

Mailchimp Integration Addon

Purpose

This addon provides integration between your shopping cart and the Mailchimp.com email marketing system. You can export existing customers, users, subscribers and ecommerce information and you can add new customers to specific mailing lists as they purchase products from your store. You can also add a subscriber block that can be displayed via the block manager for managing separate newsletter or contact lists.

You can define separate lists for categories, products and/or the list that all customers will be added to when their orders are placed. An opt-in checkbox is part of the checkout page. Customers who un-check this box will NOT have their email address added to any list. A record of the customer choice is maintained with each order the system processes.

You can display a block that has a signup for any of your lists and you can include an introduction to tell your customers a little about the list.

Once setup and configured, operation is completely automatic.

Installation

Installation is as automatic as possible. It has been tested with versions 2.0.15 – 3.0.2. It should also work with future 3.0 versions of the cart.

A download link will be enabled following capture of your payment. You will be emailed with the link to download the archive. Upon receipt of your order we will contact you to verify the Domain Name you submitted with the order and to send you the license key. This addon is licensed software. Failure to enter the license key and/or if the key does not match the domain where the addon is being used will cause the addon to be disabled. Please contact us if you encounter any problems if you feel you've entered the license key correctly and the domain name is accurate. Note: EZ Merchant Solutions customers do not need to enter a license key, it will default to using the cart license key if empty.

Installation Steps

1. Please have an existing Mailchimp account with at least 1 list defined. Lists must be created at the Mailchimp website. A valid list is required for correct operation of the addon. You will also need the "*apikey*" for your Mailchimp account. This can be obtained from the Account tab in the upper left of your Mailchimp.com screen and then selecting *APIkey and additional info* from the drop-down menu..

2. After downloading the archive, extract it in the root of your store. This will “load” the addon into the system.
3. Go to Administration->Addons and click “Install” for the **Mail Chimp Integration** addon. This will install the addon and the needed files.
4. Click the *edit* link beside the **Mail Chimp Integration** addon and configure the settings you want. Be sure to enter the license key we sent you **exactly**. Then click Save.

This will kick-off the internal installation for the addon to operate.

Customization

Customization is limited to language variables (use Translation mode to identify variables), Style Sheets located within the ‘*mailchimp*’ addon directory for both customer and admin skins as well as it’s possible to apply custom hooks to the subscription block to change the format to whatever you want. The hook names are ‘*mailchimp:subscribe_field*’ and ‘*mailchimp:subscribe_separator*’. You can read the template code to see what you can change.

General Operation

There are 2 basic types of operations:

1. Export of existing information
2. Real-time order integration with Mailchimp.com

For the export section, you can export existing users, customers from existing orders and also export your existing order information (Ecomm integration). This is pretty straightforward and will probably only be done once for most sites. However, if you clear a mailchimp list, you might want to repopulate it with existing user/customer information. The export features are available to you at any time.

For real-time integration, there are several key features.

1. Adding a customer who purchases from your site to a specific list (called the *default mailing list*). When an order completes, the customer information is sent to mailchimp.com and their information is added to the specified list.
2. You can also setup a list for specific products or categories. If setup and the customer has purchased one of the products and/or the product is in the setup category, the customer info will also be added to the lists associated with the product or category.
3. Ecommerce integration (if enabled) will be sent to mailchimp.com for each order that is placed. The information sent is the order_id, total amount of the order, the products purchased and the main categories in which the products reside. Category names are sent as a category path. The separator between categories can be changed in the addon settings setup. The default is “//”. Hence if

a product is in Pets -> Collars -> Leather Collars then the default category name would be “Pets///Collars//Leather Collars”. Of course, you can change the category separator to be “ -> “ if you want to but non-whitespace characters are best.

None of the above will occur if the customer has not opt'd in during the checkout process (default is to opt-in).

Setup And Configuration

This section will walk you through the setup process as well as walk you through the export processes. It is done in the sequence that we assume will normally be done.

A standard set of Mailchimp *merge fields* are used for all lists utilized by this integration. You do NOT need to create these fields manually, they will be created automatically when you click the *Repair* link on the *Mailchimp Integration Manage* page.

The merge fields and their meaning are (user is the billing info in detail listed below):

EMAIL – The email address of the user

TITLE – The title of the user (Mr., Ms., etc.)

FNAME – First name of the user

LNAME – Last name of the user

COMPANY – Company name from the user

PHONE – Phone number of the user (stripped to digits only)

FADDRESS – Full address with fields separated by double-spaces as specified by mailchimp.

STREET – The street address portion of an address

STREET2 – Secondary street info if provided

CITY – The city of the user

STATE – The state of the user

COUNTY – The county of the user (if specified)

ZIP – Zip code/Postal code of the user

COUNTRY – 2 character abbreviation of the users country

LANG_CODE – 2 character abbreviation for the language of the user (current user's language selection).

Addon Settings

After entering your license key (per above instructions) and clicking *Save*, settings for the addon can be changed. It is critical that you have setup the *apikey* and the *default list name* before trying to use or access the addon's functionality.

Click the *Basic Settings* tab of the Addon settings page. You will see a screen that looks like:

Mail Chimp Integration: options

[General](#)

Basic Settings

[MailChimp Export Settings](#)

MailChimp Export Settings

MailChimp API Key:

Use SSL Connections:

Default List Name:

Enable MailChimp
Ecommerce Tracking:

Ecomm Store ID (20 chars
max):

Category Separator:

The fields mean:

MailChimp API Key – The *apikey* from your mailchimp account. This can usually be found by clicking the “*account*” link in the upper left of the mailchimp web page and selecting *API Keys & Info* from the menu. Cut/paste the apikey from your mailchimp account to the *MailChimp API Key* text box on the settings page.

Use SSL Connections – Check this box if you want communication with mailchimp to be via SSL.

Default List Name – The name (from mailchimp.com) of the list that you want as the default list. This is the list that all customers who do not opt-out will be added to. The name **MUST** be an exact match so please either cut/paste or keep list names to non-space characters to avoid confusion.

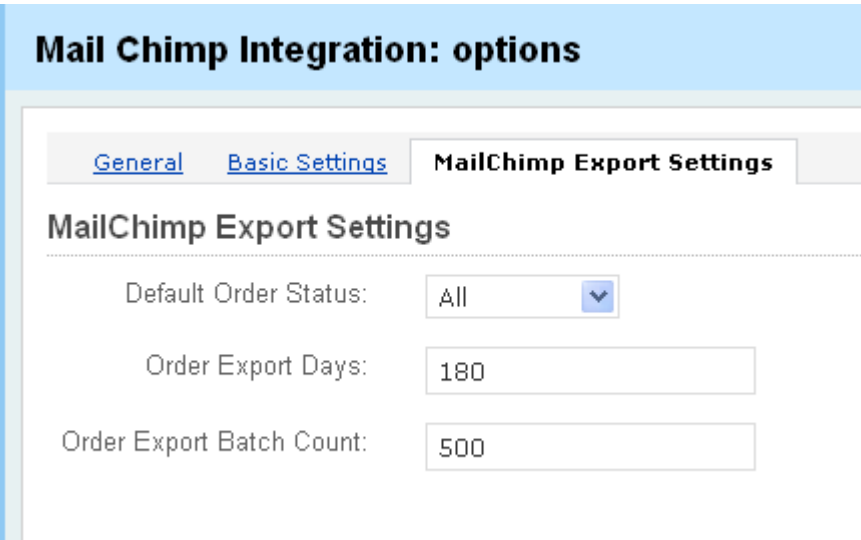
Enable MailChimp Ecommerce Tracking – Check this box to enable ecommerce tracking. When checked, ecommerce info will be sent with each transaction. Ecommerce info is not associated with any specific list. It is used in mailchimp to do things like “send

email to all customers who purchased XYZ product prior to 12/1/2010” This is done via Mailchimp list segments. Ecommerce info automatically becomes a set of segments for every Mailchimp campaign.

Ecomm Store ID (20 chars max) – Some unique identifier for this store. If you have multiple stores that all utilize mailchimp, each store must have a unique store identifier. Limit is 20 characters.

Category Separator – A string used to separate category path components when constructing a category path as the category name for ecommerce activity.

Click on the **MailChimp Export Settings** tab of the addon settings screen. It should look similar to:



The screenshot shows a settings interface for MailChimp integration. At the top, there is a blue header with the text "Mail Chimp Integration: options". Below this, there are three tabs: "General", "Basic Settings", and "MailChimp Export Settings". The "MailChimp Export Settings" tab is selected and highlighted. Underneath the tabs, the title "MailChimp Export Settings" is displayed. There are three settings visible: "Default Order Status" with a dropdown menu set to "All", "Order Export Days" with a text input field containing "180", and "Order Export Batch Count" with a text input field containing "500".

Default Order Status – select what order statuses to export. All is most generally used but other status options are *Open*, *Processed* and *Closed*.

Order Export Days – The number of days (history) of orders to export from. Entering zero will cause it to default to the system default which is 180 days. So if you want to export the last 5 years of history, you should enter something like 1850.

Export Order Batch Count – Since stores vary widely as well as PHP configurations, orders that are exported are batched in chunks of this size. This allows you to send orders without timing out in the process because of your specific hosting configuration. A setting of 500 should work for most stores and you can simply send the next 500 after the prior 500 complete.

Note: every mailchimp Ecommerce transaction (orders) is a complete round-trip to the mailchimp server and back again. Customers and users are done via a batch update. But order information is done one at a time. Hence the number of orders that you can successfully export in one chunk might vary widely even on the same server or at different times of the day. If you run into problems, start reducing the batch size downward until successful. Then lower it a bit more to be on the safe side.

Click **Save** when complete.

First Time Use

Before setting up any products or categories and before trying to export any data, it is critical that you verify that your lists are setup correctly. The addon will add any missing merge fields to your lists as required. **Only lists that have been verified will be able to be used within the system.** This ensures consistency. To check your lists and/or fix ones you want to use, *click* the *Users* tab of your Admin Panel and then click the *Mail Chimp Integration* link. This will take you to the manage page which should look something like the one below.

The screenshot displays the 'Mail Chimp Integration' admin interface. It is divided into three main sections: 'EXPORT', 'LISTS', and 'LIST STATISTICS'.

EXPORT SECTION: This section allows for exporting data based on user roles and order history. It includes four rows, each with a count, a 'Select List' dropdown, an 'Opt in' checkbox, and an 'Export' button.

- 1 Users to [Select List] Opt in: Export
- 0 Customers to [Select List] Opt in: Export
- 1 Cart Subscribers to [Select List] Opt in: Export
- Export Orders Using [150] days of history and batch using [500] orders corrupted with status: All Export

LISTS SECTION: A table listing currently defined Mailchimp lists.

List Name	List Status
CRM's	OK
Test	OK

LIST STATISTICS SECTION: A table providing current statistics for each list.

Name	Members	Unsubscribe	Created Campaigns	Rating Monthly Subs	Subject Monthly UnSubs	Open Rate	Click Rate
CRM's	92	0	2010-1-18	C	Ask an F2/Mechatronics Customer	0	0
Test	84	0	2010-1-18	C	Test List	0	0

The screen is divided into 3 sections. The upper left is the **Export** area. The upper right is a listing of all your currently defined Mailchimp lists. The lower area (spanning the full width) is the **List Statistics** area which gives you current statistics on your Mailchimp lists.

The first thing to do is to verify that the **List Status** column of the **Lists** area have a status of **OK** for the lists you want to use with

this integration. If you see **Verify / Repair** listed in the **List Status** column, then the list needs to be “*repaired*” before it can be used. If you click “*Verify*” it will tell you what is wrong with the list. If you click “*Repair*” it will be repaired. Essentially this is ensuring that all the merge fields used by the integration are part of the lists that are being used.

LISTS	
List Name	List Status
EZ Merchant Solutions List	OK
Test	Verify or Repair

Note that in this example, the list *Test* would not be in the drop-down for Exports or other list selection areas of the cart.

NOTE: Only lists marked **OK can be used by the system!!!**

For the **List Statistics** area, there are no operations. It is simply a reporting area that gives you list statistics as returned by Mailchimp.

LIST STATISTICS							
Name	Members	Unsubscribe	Created Campaigns	Rating Monthly Subs	Subject Monthly UnSubs	Open Rate	Click Rate
EZ Merchant Solutions List			2013-11-18	0	no subject set		
Test			2013-11-18	0	Test List		

Note: this shows statistics for all lists you have in Mailchimp. Not just the lists used by the addon.

Once you have at least one list that is *OK*, you can use it in other areas of the system.

Export

You can export users (people who have signed up and are seen as “Users” in your Administration/Users tab), customers (people who have purchased from you whether they are users or not) and orders. Exporting *users* and *customers* is essentially the same. The only difference is the source of the information. For *users* the source is the users table in the database. For *customers* it is the order_details table. Note that for *customers*, the *billing* information is used, not the shipping information.


Export Users and/or Customers

This is about as simple as it gets. Select a list from the drop-down menu and then simply click Export. You will get a notification about the number of successful adds and failures (if any).

If you check the *Opt-in* checkbox, then each user will be sent an opt-in email asking them to confirm that they want to be on your list. The default is to not opt-in for export but you may choose to do so if you like. Users/Customers will NOT appear in your mailchimp mailing list until they respond to the email that is sent confirming they want to be added.

Note: If you have the option set to disable anonymous checkout then you will not see the export Customers line. By definition, all Customers are also Users in this case.

Note:2: If you do not have any subscribers in your cart environment, then the Cart Subscribers line will not be show either.



The screenshot shows a form titled "EXPORT" with the following options:

- 1 Users to Opt-in:
- 0 Customers to Opt-in:
- 1 Cart Subscribers to Opt-in:
- Export Orders using days of history and batch using orders per export with status

Exporting Orders

This step is a bit more complicated due to the potentially high volume of order information and the time it takes to collect it and send it. Hence, it is broken into two or more steps. These steps are:

1. Collect the information and store it in a table in the DB.
2. Send rows of data collected and remove them from the DB.

Hence, when all orders have been exported, the table will be empty.

The first time you press export, the order_details will be copied to a new table. You can specify the history (age) of

orders to be exported and the number of orders to send per batch. If you have exported orders before, the button will be labeled “Re-Export”. If not, the button will be labeled “Export”. The system will not attempt to send any data to Mailchimp when there are no captured orders. You will see information like what’s listed below. This tells you that there are 14 orders to export and to batch them sending a maximum of 500 orders at a time. If you have 2000 orders to send, then you’d see the same info 4 times with the number of orders to send decreased by 500 each time.

The screenshot shows an 'EXPORT' interface with the following elements:

- EXPORT** (Section Header)
- 1 Users to Opt-in:
- 0 Customers to Opt-in:
- 1 Cart Subscribers to Opt-in:
- Export Orders using days of history and batch using orders per export with status

Products and Categories

You can easily have users added to lists specific to a product or category. We strongly suggest that you do this in a limited manner or you will have more lists than you know what to do with. But if you have a specific category or product that you want to collect purchaser information about, this is an easy way to do so.

Setting up a category and a product are basically the same. Go to the detail page for either and click the Addons tab. You will see an entry like:

[« back to: Products](#) :: [Category: Men](#)

Editing product: adidas Camp Tee

[add product](#) | [clone this product](#) | [delete this product](#)

[General](#) | [Images](#) | [Secondary categories](#) | [Options](#) | [Qty discounts](#) | [Files](#)
[Attachments](#) | [Required products](#)

Mail Chimp Integration

Product List: 

Product configurator

Configurable:

SEO

SEO name:

Simply select the list you want to have buyers added to when they purchase the product or where a product is in this category. Note that the category should be the Main Category associated with a product.

When a customer purchases a product that is configured in this way or purchases a product from a category that is configured this way, their information is added to the specified list.

Note: if the customer has opt'd out of email during checkout, they will NOT be added to the list(s).

Ecommerce Integration

Mailchimp provides for ecommerce integration. This sends basic information about each order to Mailchimp. The information sent is pretty generic. It is things like order_id, total amount of purchase, shipping charge, product quantities, product code, product description, customer's email address and a few other details.

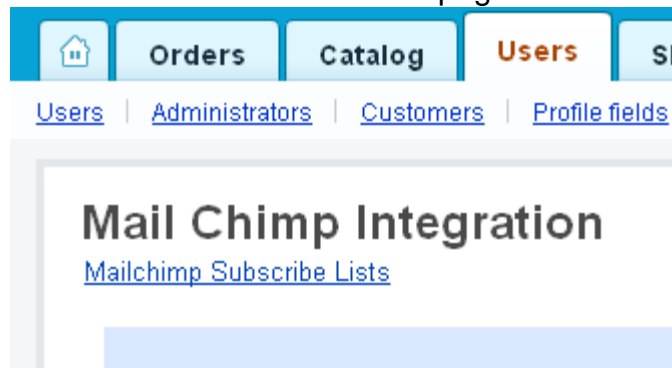
Ecommerce activity is not tied to any specific list. Instead, Ecommerce information becomes a "segment" in Mailchimp terms that can be used in campaigns to select customers who have purchased a particular (or group of) product, categories, above or below certain amounts, etc.

If enabled and the customer has not opt'd out of email, the Ecommerce info is sent to Mailchimp at the end of the checkout process. You can view ecommerce information on the Mailchimp website.

Subscription Block

Similar to the internal news and email addon functionality, you can create a block that will enable someone to sign up for all the *subscription lists* that are defined and active. The information collected can be different for each list and is collected separately. There is not currently the ability to allow a user to subscribe to more than one list using a single email address (and optionally other info). This is being looked at in a subsequent release.

To create a mailing list subscription block, go to the Administration/Users Admin panel and select *Mail Chimp Integration*. Then click the *Mailchimp Subscribe Lists* link under the page title.



If you have not created any lists, you will have a single line for a new entry that looks like the **New** line below:

MAILCHIMP MAILING LISTS					
POSITION	MAIL CHIMP SUBSCRIBE LIST	NAME	STATUS	OPT IN	ACTIONS
10	Test	test	Active	Yes	Edit / Delete
20	Test	test	Active	Yes	Edit / Delete
New					
0	Select List	<input type="text"/>	<input checked="" type="radio"/> Active <input type="radio"/> Disabled	<input checked="" type="checkbox"/>	
<input type="button" value="Save"/>					

The columns of the screen have the following meaning:

Position – The position of the subscription list in the subscription block.

Mail Chimp Subscribe List – The list selection drop-down.

Name – A meaningful name to assign to your list. This will also be used as the Title for the list

Status – The current status of the list. Either *Active* or *Disabled*.

Opt-in – Whether to send an *opt-in* email to the subscriber to confirm the subscription. The default is *Yes* (checked).

Action – You can either delete the subscription (does NOT delete the list) or Edit the subscription.

Once you have created a subscription, click **Save**. This will create the list with default values. You can then click *Edit* to modify the settings for your mailing list. This will take you to a screen that looks like:

NAME	LABEL	LANGUAGE	REQUIRED	STATUS	POSITION
EMAIL	<input type="text" value="Email"/>	EN	<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Active <input type="radio"/> Hidden	<input type="text" value="10"/>
TITLE	<input type="text" value="Title"/>	EN	<input type="checkbox"/>	<input checked="" type="radio"/> Active <input type="radio"/> Hidden	<input type="text" value="20"/>
FNAME	<input type="text" value="First name"/>	EN	<input type="checkbox"/>	<input checked="" type="radio"/> Active <input type="radio"/> Hidden	<input type="text" value="30"/>
LNAME	<input type="text" value="Last name"/>	EN	<input type="checkbox"/>	<input checked="" type="radio"/> Active <input type="radio"/> Hidden	<input type="text" value="40"/>
COMPANY	<input type="text" value="Company"/>	EN	<input type="checkbox"/>	<input checked="" type="radio"/> Active <input type="radio"/> Hidden	<input type="text" value="50"/>
PHONE	<input type="text" value="Phone number"/>	EN	<input type="checkbox"/>	<input checked="" type="radio"/> Active <input type="radio"/> Hidden	<input type="text" value="60"/>
ADDRESS	<input type="text" value="Full address"/>	EN	<input type="checkbox"/>	<input checked="" type="radio"/> Active <input type="radio"/> Hidden	<input type="text" value="70"/>

On this screen you can change the *Name* of the mailing list, the associated Mailchimp list that this mailinglist subscription will be sent to, the *Status*, whether to *Opt-in* or not and the *Intro*.

Checking off the *Opt-in* checkbox will send an email to your subscribers requesting them to confirm they want to be on your list. This significantly reduces spam in your mailing lists.

The intro is usually a brief paragraph describing the mailinglist. You can use plain text or HTML. The intro is placed in a blockquote below the title on the subscription block.

The lower area allows you to set the label for fields and whether those fields will be included in the subscription block or not as well as whether the field is required for submission.

When you are done, click **Save** at the bottom of the screen.

To create the actual block for V2, go to Administration/Design and select Blocks. Click the *Add block* button when you decide what page(s) you want the block to appear on. Then click the *Add block* button and select *Mailchimp Subscribe* as the block content.

To create the actual block for V3, go to Design/Blocks. Select the Block Manager tab and then the Add Block tab. Click the icon labeled *Mailchimp subscription* and name the block whatever you want and handle it as you

would other blocks in V3. You would then add this block to a grid within the V3 block manager.

General

Name: * **Subscribe**

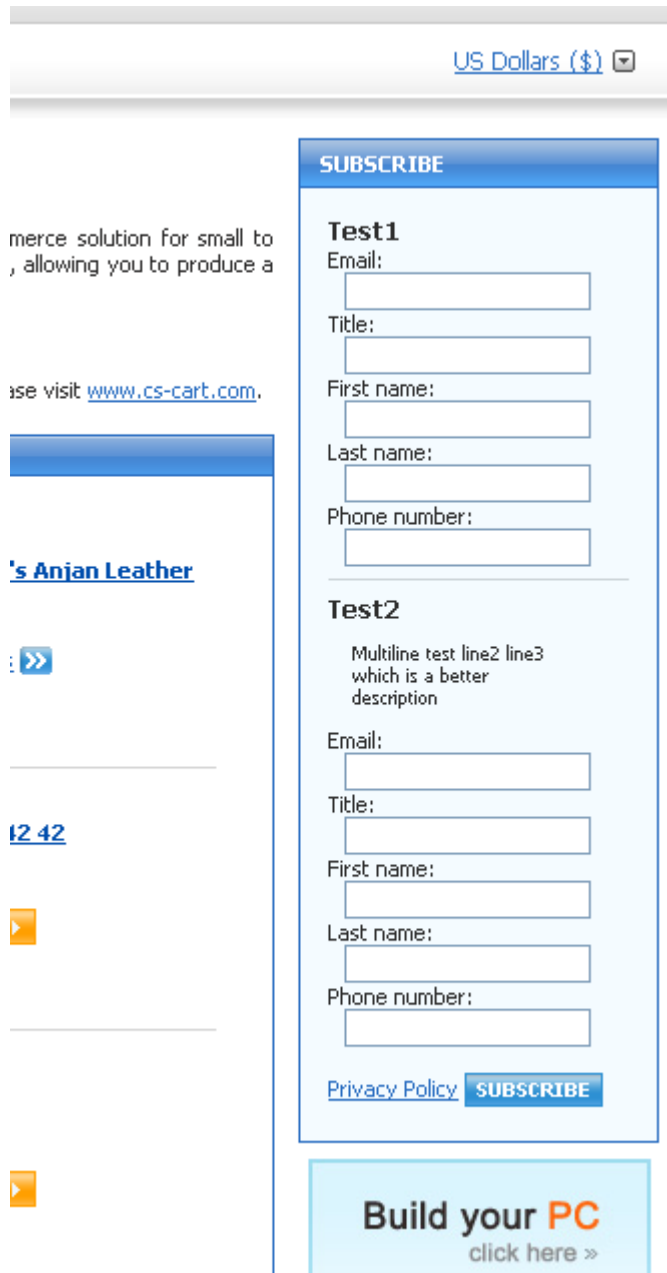
Block content: Mailchimp Subscribe ▼

Filling: Not applicable ▼

Appearance type: Not applicable ▼

Wrapper: blocks/wrappers/sidebox_general.tpl ▼

For the 2 active mailinglist subscriptions in this example, the subscription block would look like:



You can see how the *Intro* is displayed for the list named *Test2* above. If left empty, then it would look like the *Test1* example above.

The display of fields can be altered via CSS located at:
skins/<your_skin>/customer/addons/mailchimp/css/mailchimp.css

Hooks are available for the subscription field layout/format. You can view Skins/<your_skin>customer/addons/blocks/mailchimp_subscribe.tpl for the hook positions and it will help you see what you can

change. Would suggest that if you do use hooks that you do them in the 'my_changes' addon so that if the mailchimp addon is re-installed, the changes will not be overwritten.

Contact Us

If you have any difficulty you can contact us via one of the following contact points:

- Email – support@ez-ms.com
- Phone – (503) 906-3563

We will do our best to ensure you are satisfied.