

Little Green Light & MailChimp: Email Marketing

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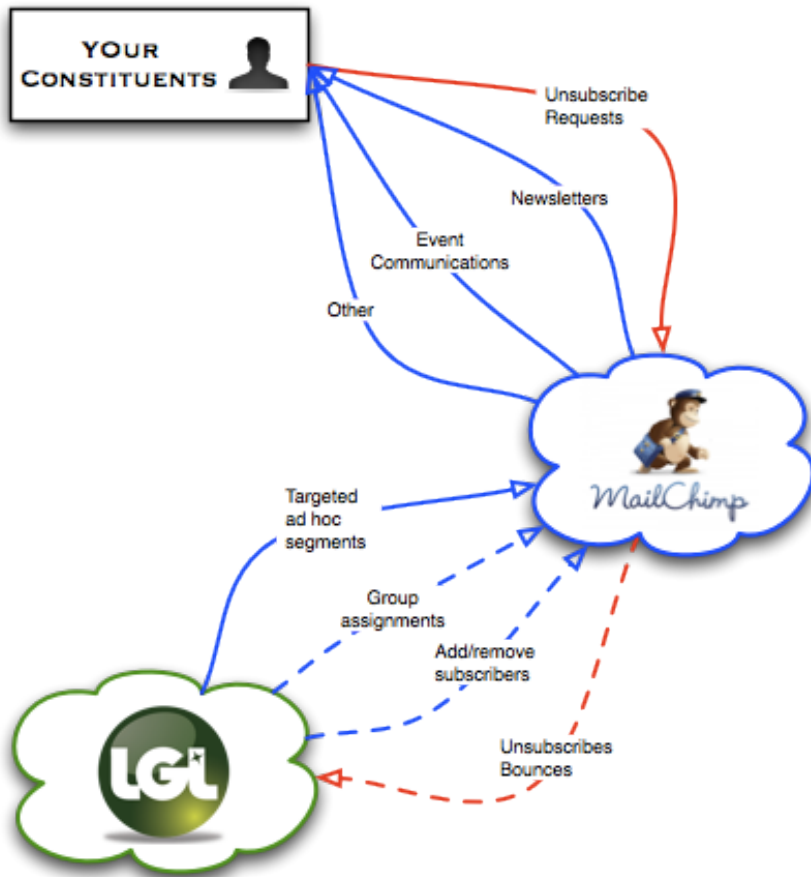
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2. Overview

Little Green Light's integration with MailChimp, will allow you to manage your email marketing lists from within LGL. After a simple setup/configuration within MailChimp and LGL, you can begin syncing information from your LGL account to MailChimp.

The synchronization process between MailChimp and LGL is a two-way process, allowing you to add and remove constituents from your MailChimp mailing lists, and automatically receiving updates when constituents unsubscribe, or have their email bounce (if the address is no longer valid).

The process looks something like this:



Note: MailChimp is not affiliated with LGL in any way. The MailChimp service is completely separate and carries its own pricing structure, terms of service, and privacy policy. Please see <http://www.mailchimp.com/> for details.

Also note: You must be an administrator to use this feature in LGL. If you are not an admin, you will not see any of these features.

3. Connect LGL to MailChimp

The first step here is to create your MailChimp account. Then you'll want to setup a list in MailChimp to use for the integration, generate an API Key, and connect those up to your LGL Account. We'll review how to do all that here.

a. Create your MailChimp account if you don't already have one

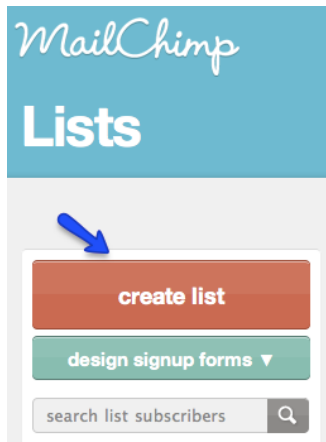
If you don't already have a MailChimp account, you can create one here: <https://mailchimp.com/signup/>. If you do already have a MailChimp account you can skip this step.

b. Create a list in MailChimp to sync with LGL

1. After logging in to your MailChimp account, click on the *Lists* menu.



2. Then, click on the *create list* button



3. Lastly, name your list and save it, filling out all required fields

A screenshot of the 'set up your new list' form in MailChimp. The form has a title 'set up your new list' and a 'list name' field with the text 'LGL MailChimp Integration'. Below the field is a note: 'Good example: "Acme Company Newsletter" - Bad example: "Cust_11_01_2007"'. There is also a 'default from name' field which is currently empty.

4. As an optional 4th step, you can create groups for your list, which you can use to connect to your LGL categories (see section 3 below for full details).

drag/drop to reorder lists update list order

0

LGL MailChimp Integration 08/14/2011
1

import
 add people
 remove people
 send to list

★ no rating yet ★
list rating

settings ▼
 replicate
 delete

forms
 list data
 groups ▼

create groups

Now you have a list that is ready to be connected to your LGL account.

e. Generate your MailChimp API Key and copy it

The next step is to generate your MailChimp API Key, if you don't already have one.

- I. To do that, move mouse over the *Account* menu, and click on the *API Keys & Authorized Apps* option:

The screenshot shows the MailChimp account menu for user 'ninux99'. The 'Account' dropdown menu is open, displaying several categories and options:

- Account**
 - Username/Password & Security Settings
 - Contact Info
 - My Defaults
 - Account Status
 - Export My Data
 - Close My Account
- Billing**
 - Monthly Plans or Buy Credits
 - Billing Information
 - Billing Statements
- Rewards**
 - MonkeyRewards
 - Partner Discounts
- Extras**
 - Add-Ons
 - Integrations
 - API Keys & Authorized Apps** (highlighted with a blue arrow)
 - Co-Branding

- Next, click on the *add a key* button to generate your API Key, unless you already have one. After it is generated, copy the full text of the API Key:

Your API Keys

[Copy the API Key for use in LGL](#)

Created	Label	API Key	QR Code	Status
Aug 14, 2011 03:28 am	none set	f63c37cd8a9feb13c673167e500907bf-us2	QR	disable
Jun 20, 2011 06:01 pm	none set	fbdf678ae2d518d0b7b20f81b9dc0a2e-us2	QR	disable

[add a key](#)

API keys provide full access to your MailChimp account, so keep them private. [tips on keeping API keys safe](#)

1. Click this button to add an API Key

c. Connect MailChimp to your LGL Account

Once you have your list build in MailChimp and your API Key copied to your clipboard, you can move on to setting up the integration in LGL. Log in to your LGL account, and then:

- Go to *Settings* and click on the *Integration Settings* link
- Click on the *MailChimp Integration* menu
- Paste your MailChimp API Key into the form and click the *Save* button

- Lastly, choose the list you want to integrate from the menu, and press the *Save* button.

e. Activate automatic updates from MailChimp

As a last step, you can activate a *Webhook* in MailChimp by clicking the *Activate* button

This will allow MailChimp to automatically post unsubscribe requests, email bounces, and email updates back to LGL when subscribers change their status or information, or when emails bounce.

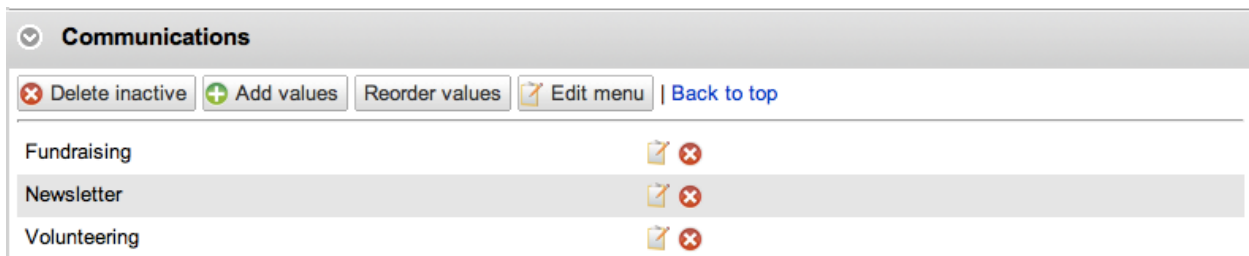
3. Connecting MailChimp Groups to LGL Categories

If you plan to send emails to different segments of constituents on a regular basis, it is best to set up a connection between some MailChimp Groups and corresponding LGL Categories. You can do this by creating a Group in MailChimp for each Category in LGL that you want to keep in sync, and then mapping the values so that LGL can understand which categories should be pushed back to MailChimp.

For example, if you allow subscribers to indicate their preferences for which types of communications they would like to receive in, you might set up a *Communications* category in LGL and a *Communications* group in your MailChimp list.

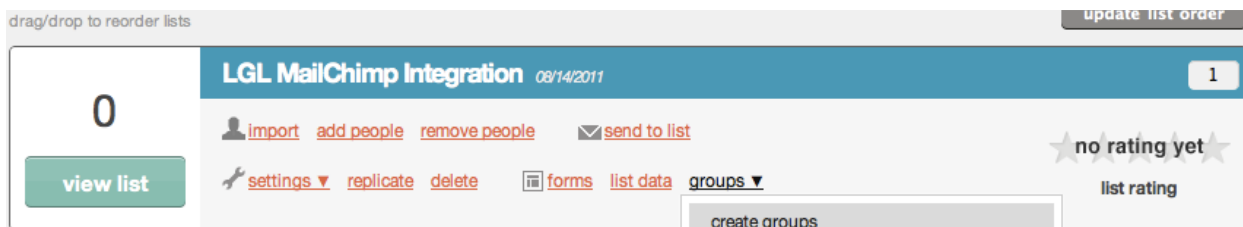
a. Add a category to LGL

Navigate to the *Menu Items* page, and click on the *Add a category* button, and then add the values you want to track:



b. Add a group to MailChimp

1. Within MailChimp, click on the *Lists* menu, and then click the *Create groups* option:



2. Add a *Communications* group, and values that will line up with your LGL category. These don't need to be exact matches, since we will map them in LGL.

create groups

These groups go in which list?
 LGL MailChimp Integration ▼

How should we show group options on your signup form?
 as checkboxes (people can select more than one) ▼

group title
 Communications
 Example: "Interested in ..." or "Food Preferences".

Fundraising
 Example: "New products" or "Vegetarian" -

Volunteering
 Example: "New products" or "Vegetarian" -

Newsletter
 Example: "New products" or "Vegetarian" -

+ add group

save **cancel**

c. Map the MailChimp group values to your LGL Category

Now, you can map the MailChimp *Communications* group to your *Communications* category in LGL.

1. Navigate to your *MailChimp Integration* page
2. Click the *Update field mappings* button in the *MailChimp fields* section

Mailchimp Fields

MailChimp Field Name	LGL Field
Communications	Communications
Email Address	Email address
First Name	First name
Last Name	Last name

3. Make sure that the *Communications* group field from MailChimp is mapped to the *Communications* category in LGL. Then, click the *Add rule* button and select *Map Values*

MailChimp Field Name	LGL Field
Communications View choices	Field Communications + Add a rule ✓ --select rule -- Map values
Email Address	Field Email address + Add a rule Set defaults

4. Map all the values as desired and save the form.

MailChimp Field Name	LGL Field
Communications View choices	Field Communications + Add a rule
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Rule: Map values</p> <p>MailChimp Choices</p> <p>Map: Fundraising</p> <p>Map: Volunteering</p> <p>Map: Newsletter</p> </div> <div style="margin-left: 20px;"> <p>to ✓ Fundraising</p> <p>to Newsletter</p> </div> <div style="float: right; text-align: right;"> <p>✗ Remove rule</p> </div>	

Now, each time that you mark a constituent *subscribed* in LGL, their *Communications* preferences will be automatically synced to MailChimp, making it easy to segment a given campaign within MailChimp by that group.

4. Managing MailChimp Subscribers in LGL

Setting up the MailChimp integration automatically creates a *MailChimp Status* category. Only those constituents with a *MailChimp Status* of *Subscribed* will be synced to MailChimp.

a. Restrictions

LGL will prevent you from subscribing any constituent who can't or doesn't want to receive email. As such, you will not be able to "Subscribe" a constituent who also has the special *Do not email* tag set, nor can you subscribe a constituent who has *Unsubscribed* via MailChimp. LGL will also prevent you from subscribing a constituent whose email is not valid or has bounced.

b. Subscribing an individual constituent

To add individual constituents to MailChimp, find them in a search or navigate to their details page, and then edit their *MailChimp Status*:

0 selected constituents History Select 1 Deselect 1 Show all		Giving summary ▼	
<input type="checkbox"/>	Constituent ▼		Total \$0
<input type="checkbox"/>	<p>Seinfeld, Jerry Jerry Seinfeld Jerry Seinfeld Apartment 5A, 129 West 81st Street New York, NY 10011 888-555-0083 seinfeld@jerryseinfeld.co...</p>	<p>MailChimp Status None defined + Add</p> <p>Stewards None defined →</p> <p>Groups</p> <p>Capacity None defined</p> <p>Interest None defined</p> <p>Edit categories</p>	

MailChimp Status Total \$0

Stewards

Groups

Capacity None defined

Select MailChimp Status
 ✓ -- none --
 Subscribed

Save or Cancel

0 selected constituents History Select 1 Deselect 1 Show all

Constituent	MailChimp Status	Stewards	Groups	Capacity	Interest	Giving summary
<input type="checkbox"/> Seinfeld, Jerry Jerry Seinfeld Jerry Seinfeld Apartment 5A, 129 West 81st Street New York, NY 10011 888-555-0083 seinfeld@jerryseinfeld.co...	Subscribed	None defined		None defined	None defined	Total \$0

Edit categories

c. Removing one constituent from MailChimp

To remove a constituent, follow the same steps as above, but change the status to – none –.

d. Bulk subscribing constituents

You can subscribe any number of *Selected* constituents to your MailChimp list. To do so, first search for the constituents you want to add, and then click the *Select X* button, to select them. From there, you can click on the *More actions* button and select the *Update MailChimp Status*:

Results 1 - 2 of 2

2 selected constituents History Select 2 Deselect 2 Show all More actions Save selected

Constituent	MailChimp Status	Stewards	Groups	Capacity	Interest
<input checked="" type="checkbox"/> Newman Seinfeld Newman Apartment 5E, 129 West 81st Street New York, NY 10012 888-555-0049 newman@seinfeld.com					None defined

Add task to selected
 Add goal to selected
 Update stewards
 Update MailChimp status
 Update categories
 Clear list

Edit categories

This will pull up a form that allows you to change the status of all selected constituents:

Update MailChimp Status

Update the MailChimp status for 2 out of 2 selected constituent(s).

Exclusions	
MailChimp - Unsubscribed:	0 constituent/s
MailChimp - Cleaned:	0 constituent/s
Deceased:	0 constituent/s
Do not email:	0 constituent/s
No valid email:	0 constituent/s
Total Exclusions:	0 constituent/s

Update MailChimp Status
 ✓ -- no update --
 -- remove --
 Subscribed

Save or Cancel

5. Send targeted emails to Static Segments

Sometimes, it is not enough to rely on the synchronization between MailChimp groups and LGL categories. For instance, if you want to email an appeal to lapsed donors, you might want to create a list in LGL and then sync that list to a *Static Segment* in MailChimp.

a. Build a list in LGL

You can do this by first creating your list in LGL:

Save List

Name

Auto-update?

or [Cancel](#)

b. Subscribe everyone on the list

From there, you can subscribe everyone on the list (who is not excluded based on the restrictions mentioned above) by clicking the *Subscribe X to MailChimp* button.

MailChimp Status

Subscribed in LGL: 1 constituent(s) out 84 total

Exclusions

<i>MailChimp - Unsubscribed:</i>	0 constituent/s
<i>MailChimp - Cleaned:</i>	0 constituent/s
<i>Deceased:</i>	0 constituent/s
<i>Do not email:</i>	0 constituent/s
<i>No valid email:</i>	0 constituent/s

Total Exclusions: 0 constituent/s

c. Link the LGL List to a static segment in MailChimp

Lastly, you can link these constituents to a *Static Segment* within MailChimp:

MailChimp Status

Subscribed in LGL: 1 constituent(s) out 84 total

Exclusions

<i>MailChimp - Unsubscribed:</i>	0 constituent/s
<i>MailChimp - Cleaned:</i>	0 constituent/s
<i>Deceased:</i>	0 constituent/s
<i>Do not email:</i>	0 constituent/s
<i>No valid email:</i>	0 constituent/s

Total Exclusions: 0 constituent/s

Active in MailChimp?

No, this list does not have a segment within MailChimp. Click the "Add MailChimp segment" button to create one.

MailChimp Segment Name

or [Cancel](#)

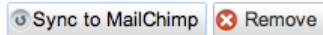
[Manage Segments](#)

And then you can sync it immediately:

MailChimp Segment

Lapsed Donors 2011

1 subscriber(s) in MailChimp Segment



Sync completed at 2011-08-14 at 03:09 AM

Note that there may be differences between the total number of subscribed constituents in LGL and MailChimp if you have not pushed the changes to MailChimp recently, or if any constituents share an email address within LGL.

[Manage Segments](#)

6. Wrapping up

We've only just covered the basics when it comes to integrating MailChimp and LGL, but you should now have enough information to get up and running. If and when you run into questions, please send us an email or give us a call.

support@littlegreenlight.com

877.820.6109

We are here to help!