Mailchimp and Salesforce Bidirectional Integration
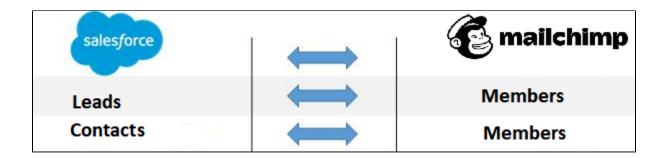
Overview

DBSync for Mailchimp & Salesforce integration template is easy to integrate Mailchimp Members with Salesforce Leads and Contacts. DBSync provides bi-directional sync between Mailchimp and Salesforce with the pre-built field to field mappings along with flexibility for more complex and dynamic mapping capabilities. DBSync with an automatic online update, enables customers to enjoy all the product updates and features with every new release.

DataFlow

The data flow of bidirectional integration between Salesforce & Mailchimp is shown in the below table.

This Data Flow diagram shows that you can create a separate list of Lost Customers, Current Customers, and Stuck Opportunities with the help of Salesforce Leads and Contacts objects. You can run a campaign in Mailchimp and Integrate the information from Salesforce to Mailchimp.

Prerequisites

To faciltate the data flow between Salesforce and Mailchimp, the user has to do the following

- Have a valid license to DBSync Mailchimp and Salesforce connector.
- Should have a valid username, password to access Mailchimp.
- Should have a valid username, password of the Salesforce Instance.

> Make Sure you have a valid Username and Password to access Mailchimp. For more information, follow the Stage Steps below.

Getting Started With DBSync

1. Go to www.mydbsync.com & register for Free Trial. Ensure that Source & Target Adapters are Salesforce & Mailchimp respectively and fill in the user registration form to complete registration.
2. An email would have been triggered from dbsync-notification@mydbsync.com to the registered email id. Click on the activation link to activate your DBSync account
3. Click on "Development studio" will redirect the user to the connectors landing page, configure both Salesforce and Mailchimp connectors respectively.
4. Now run the integration by following the steps listed in the latter section "Running The Integration".

How to connect a Mailchimp Instance with DBSync

1. Go to the DBSync connectors page and click on the Mailchimp connector.
2. After that, you will find the "Connect" button and click on the connect button will redirect the user to Mailchimp Login popup.
3. Enter your Username and password of your Mailchimp instance to authenticate your user credentials and grant access to DBSync App.
4. After successful authentication, your Mailchimp username will be displayed on the connector settings page which clearly indicates Mailchimp is connected to DBSync.

Frequently Asked Questions

Q: Can I get a trial of DBSync Mailchimp Instance?

A: DBSync is available free for 14 days trial after going through the signup process.

Q: Does this connector be used for bi-directional integration?

A: Yes, and you also have the control to make it uni-directional if you choose.

Q: How frequent can we perform Integration?

A: The DBSync has the ability to trigger data integration for as low as three minutes.

Q: How does DBSync connect to Mailchimp Instance?

A: DBSync connects to the Mailchimp connector called Mailchimp Instance which has inbuilt API methods that open a connection to the Mailchimp application for data retrieval and data insertion.

Q: Does DBSync need to be installed on the same machine as that of Mailchimp Instance?

A: The answer is No, As both of the platforms are available through the cloud and if required can also be installed on-premise.