

ShipWorks®

User Guide

Updating MailChimp Lists with ShipWorks

Contents

Updating MailChimp Lists with ShipWorks	3
Background	3
First Things First	3
The Process	4
Adding the MailChimp Subscribe Template to ShipWorks	4
Gathering Needed Information from MailChimp	8
Creating the MailChimp Action in ShipWorks	8
Sending Customer Information to Your MailChimp List	13
Things to Know	14
Still Need Help?	14

Updating MailChimp Lists with ShipWorks

Table of Contents

[Background](#)

[First Things First](#)

[The Process](#)

[Adding the MailChimp Subscribe Template to ShipWorks](#)

[Gathering the Needed MailChimp Information](#)

[Creating the MailChimp Action in ShipWorks](#)

[Things to Know](#)

[Still Need Help](#)

Background

You can update your MailChimp email list by sending your customer's name and email address to MailChimp from within ShipWorks. By creating an action in ShipWorks you will be able to click a button in ShipWorks to easily update your MailChimp list with customer information that may not be already included in your email list.

This may prove useful if you have customers who place orders with you and the customer's information is not automatically added to the email list in MailChimp.

This article will guide you through how to add an action and a template to ShipWorks, allowing you to update your MailChimp list(s).

First Things First

Please be sure that you have the following in place before continuing:

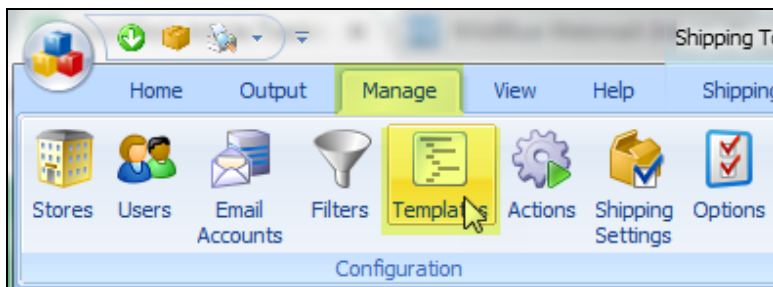
- » You have ShipWorks installed and are logged into ShipWorks as a user with administrator rights.
- » You are able to log into your MailChimp account as a user with administrator access.

The Process

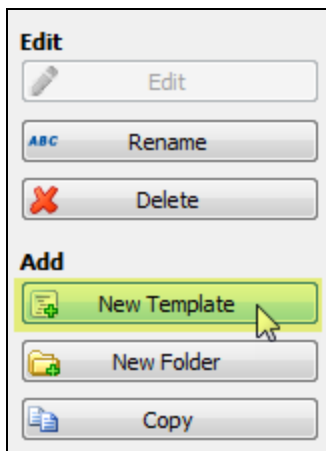
Adding the MailChimp Subscribe Template to ShipWorks

The **MailChimp Subscribe** template is used by ShipWorks to send your customer's subscription information to MailChimp in a format that MailChimp understands. The following steps will guide you through how to add the template to ShipWorks.

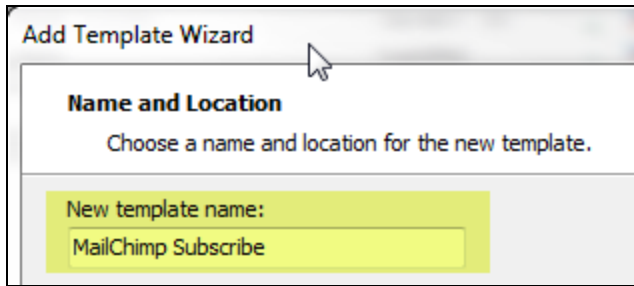
1. In ShipWorks, click on the **Manage** tab and then on the **Templates** button.



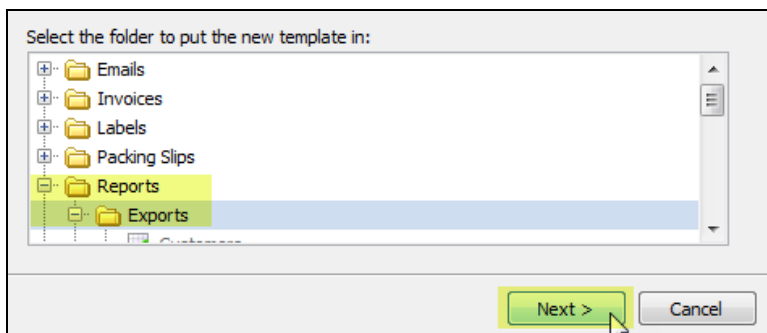
2. Click on the **New Template** button on the right side of the **Template Manager** screen.



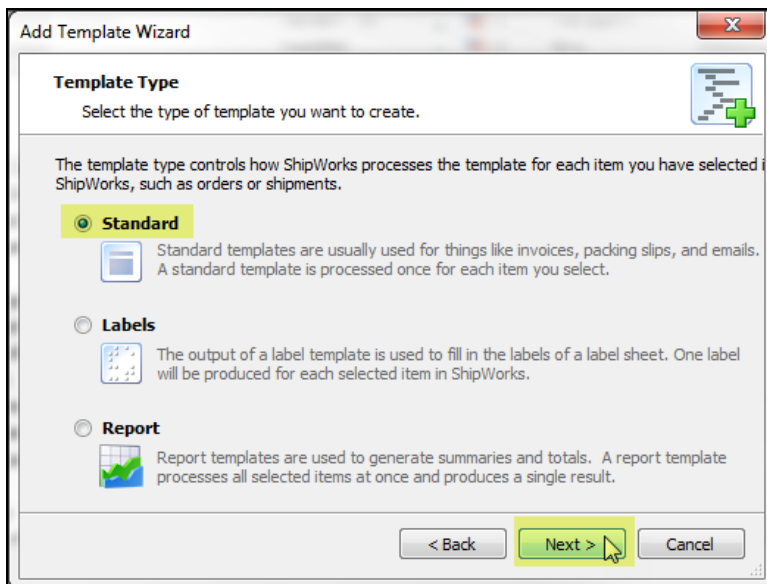
3. Name the template **MailChimp Subscribe**.



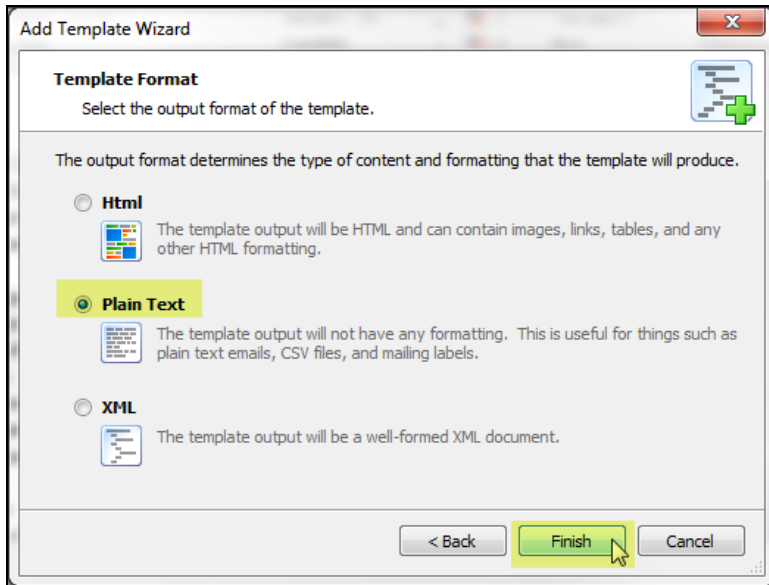
4. In the **Select the folder to put the new template in:** section, expand the **Reports** folder. Then, select the **Exports** folder. Click **Next**.



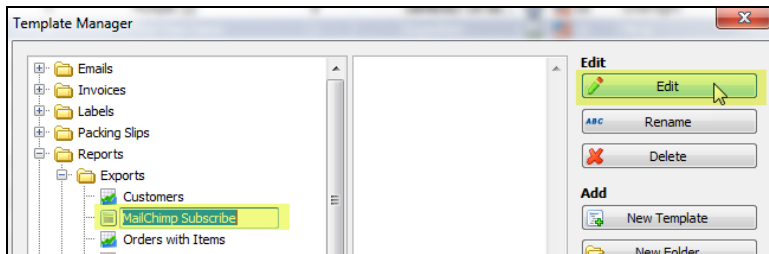
5. Select **Standard** as the **Template Type**. Then, click **Next**.



6. On the **Template Format** screen, select **Plain Text** and then click the **Finish** button.



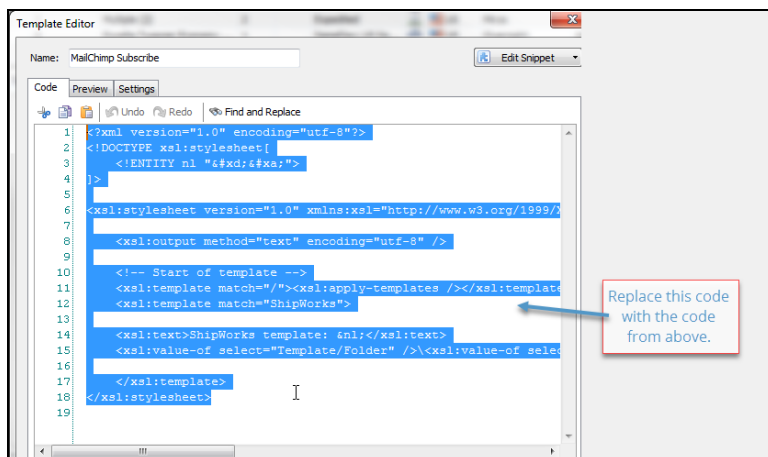
7. Verify that the **MailChimp Subscribe** template that you just created is selected. Then, click on the **Edit** button.



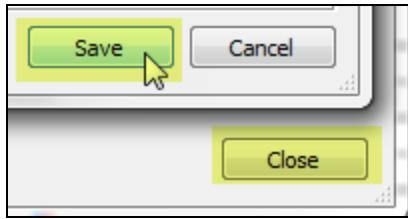
8. Verify that the **Code** tab is selected. Then, select and delete all of the code in the code screen. Next, copy the code from the below box and paste it into the **Code** tab in ShipWorks.

HTML

```
<?xml version="1.0" encoding="utf-8"?>
<!DOCTYPE xsl:stylesheet[
  <ENTITY nl "&amp;amp;amp;#xd;&amp;amp;amp;#xa;">
]>
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform" xmlns:sw="http://www.in-
teraptive.com/shipworks" extension-element-prefixes="sw" >
  <xsl:output method="text" encoding="utf-8" />
  <!-- Start of template -->
  <xsl:template match="/"><xsl:apply-templates /></xsl:template>
  <xsl:template match="ShipWorks">
  {
    "email_address": "<xsl:value-of select="//Order/Address/Email"/>",
    "status": "subscribed",
    "merge_fields": {
      "FNAME": "<xsl:value-of select="//Order/Address/FirstName"/>",
      "LNAME": "<xsl:value-of select="//Order/Address/LastName"/>"
    }
  }
  </xsl:template>
</xsl:stylesheet>
```



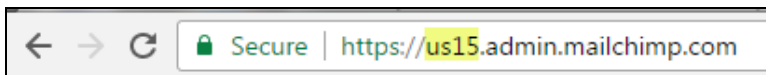
9. Click **Save** and then click **Close**.



Gathering Needed Information from MailChimp

In order to create the **Send to MailChimp** action in ShipWorks you will need to gather some information from MailChimp first:

- » Your MailChimp list's unique ID - [Please follow the steps outlined in this MailChimp article](#) to obtain your list ID. Make note of the ID as you will need it when creating the action in ShipWorks.
 - » Your MailChimp API Key - [Please follow the steps outlined in this MailChimp article](#) to generate and/or obtain your MailChimp API key. Make note of the key as you will need it when creating the action in ShipWorks.
 - » Your MailChimp server ID - Follow the below steps to obtain your MailChimp server ID. Make note of the ID as you will need it when creating the action in ShipWorks.
1. Log into your MailChimp account.
 2. Once logged in, look at the URL in your web browser. Make note of the highlighted section in the sample below. This is your MailChimp server ID.

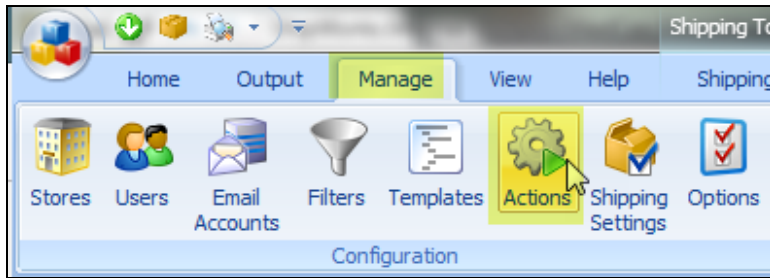


In the above example, the server ID is **us15**.

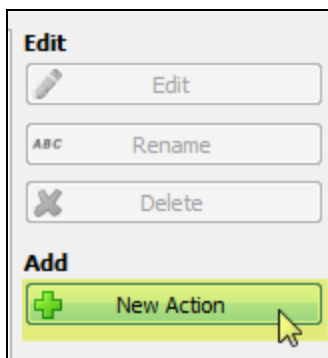
Creating the MailChimp Action in ShipWorks

Using the List ID, API key, and Server ID obtained from MailChimp in the previous steps, let's create the action to update your MailChimp list with information from ShipWorks.

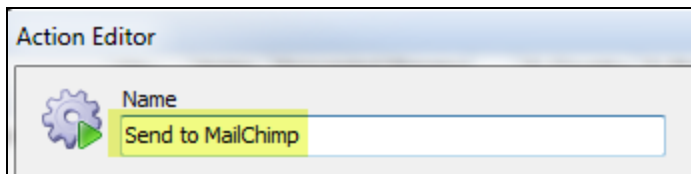
1. In ShipWorks, click on the **Manage** tab and then on the **Actions** button.



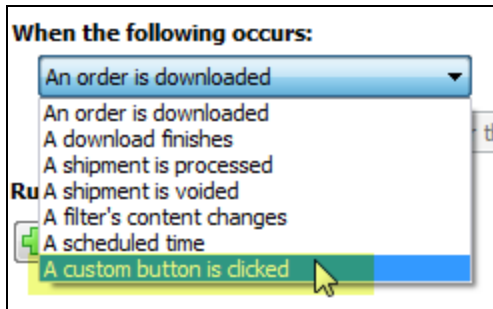
2. Click on the **New Action** button on the right side of the **Action Manager** screen.



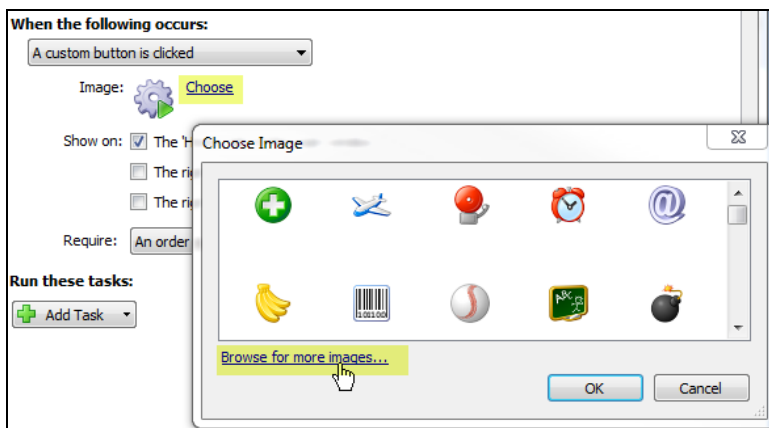
3. Give the action a name, like **Send to MailChimp**. You can actually name the action anything you would like.



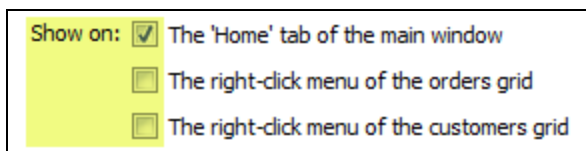
4. Click on the **When the following occurs:** drop-down menu and select **A custom button is clicked** from the list of options. This option creates a custom button on the **Home** tab in ShipWorks that you will click to send information to MailChimp.



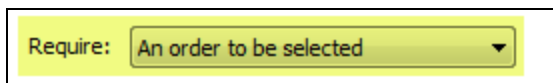
5. Optionally, you can select the image used on the custom button by clicking on the **Choose** link to the right of the **Image:** icon. You can select an image from the available list of images in ShipWorks, or upload your own image by clicking on the **Browse for more images...** link. In our example, we uploaded a publicly available image of the MailChimp logo.



6. The custom button, by default, will show up on the **Home** tab in ShipWorks. You can also specify whether or not to show the button in the right-click menu of the orders grid or the customers grid.

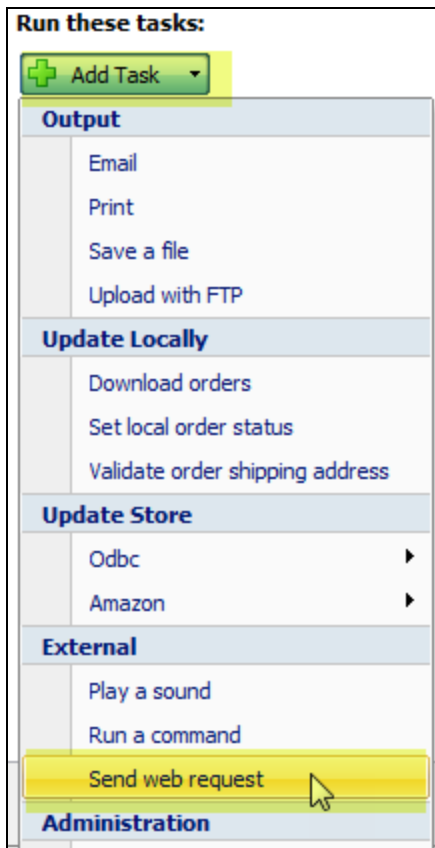


7. Leave the **Require:** option as the default of **An order to be selected**.



Require: An order to be selected

8. Click on the **Add Task** button and select **Send web request** from the drop-down menu.



Run these tasks:

+ Add Task

Output

- Email
- Print
- Save a file
- Upload with FTP

Update Locally

- Download orders
- Set local order status
- Validate order shipping address

Update Store

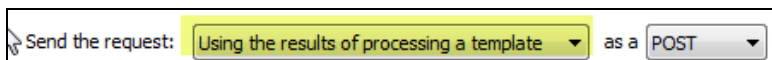
- Odbc
- Amazon

External

- Play a sound
- Run a command
- Send web request**

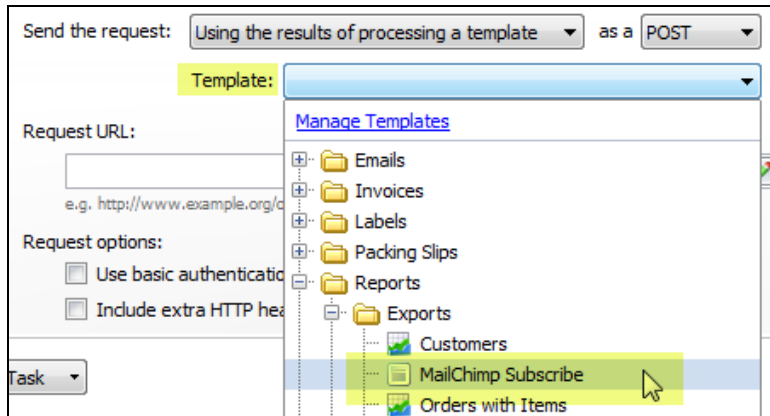
Administration

9. Leave **Send the request using: The selected orders** as is. Then, click on the **Send the request:** drop-down menu and select **Using the results of processing a template** so that the options are configured like the below screen-shot.



Send the request: Using the results of processing a template as a POST

10. Click on the **Template:** drop-down menu and select the **Reports > Exports > MailChimp Subscribe** template you created earlier in this article.



11. Now, we need to create your **Request URL:** by replacing the server ID and List ID in the below example URL with the information gathered from MailChimp earlier in this article.

example URL: <https://yourserverID.api.mailchimp.com/3.0/lists/yourlistID/members/>

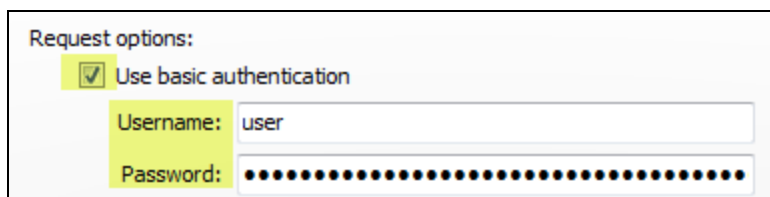
So, if your Server ID is **us17** and your unique List ID is **d78e54n456**, your URL would be <https://us17.api.mailchimp.com/3.0/lists/d78e54n456/members/>

Enter your URL into the **Request URL:** field.

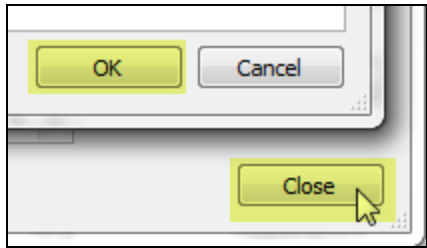


12. In the **Request options:** section, check the box to the left of **Use basic authentication**. Then, enter the following:

- » **Username:** user
- » **Password:** The API Key that you obtained from MailChimp earlier in this article.



13. Click **OK** then **Close**.



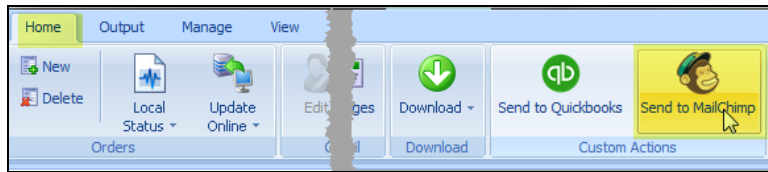
That's it!! Your template is installed and the action is created to send customer information to your MailChimp list. Next, let's take a look at how to send the information to MailChimp using the action you just created.

Sending Customer Information to Your MailChimp List

1. On the main orders grid, select the order(s) that contain the customer information you wish to send to MailChimp by checking the box to the left of the order(s).

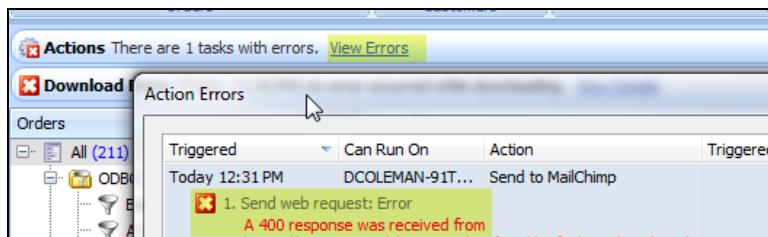
All		
Date	Store Name	Order #
<input type="checkbox"/> May 05, 2016	Amazon	1
<input type="checkbox"/> Yesterday	Odbc	1
<input type="checkbox"/> August 02, 2...	Amazon	2
<input checked="" type="checkbox"/> Yesterday	Odbc	2
<input type="checkbox"/> July 27, 2016	Amazon	3
<input checked="" type="checkbox"/> Yesterday	Odbc	3
<input checked="" type="checkbox"/> July 18, 2016	Amazon	4
<input checked="" type="checkbox"/> Yesterday	Odbc	4
<input type="checkbox"/> August 19, 2...	Amazon	5
<input type="checkbox"/> Yesterday	Odbc	5
<input type="checkbox"/> August 12, 2...	Amazon	6
<input type="checkbox"/> Yesterday	Odbc	6
<input checked="" type="checkbox"/> August 23, 2...	Amazon	7
<input type="checkbox"/> Yesterday	Odbc	7

2. Click on the **Home** tab and then click on the **Send to MailChimp** button.



Things to Know

- » There will be no physical indicator that the list was updated successfully after clicking the **Send to MailChimp** button. No response is a good thing.
- » If you receive an action error after clicking on the **Send to MailChimp** button, check the error by clicking on the **View Errors** link in the information bar at the top of the ShipWorks window. A **400 response was received** error is a response from MailChimp indicating that one or more email addresses were already included in the MailChimp list.



Still Need Help?

Please feel free to [reach out to one of our awesome Customer Care representatives in St. Louis](#). We are happy to assist you.