

Syncing DMS Groups with your Mailchimp Account

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Donor Management System

After [configuring your Mailchimp Settings](#) in your DMS, you'll just need to sync your [DMS Groups or Smart Groups](#) with your Mailchimp account so that both systems can communicate with one another.

To do so, you have **two options, either:**

- Sync your DMS Group/s with existing [Mailchimp Audiences](#) and/or [Mailchimp Audience Groups](#),

or

- Create new Mailchimp Audiences and/or Mailchimp Audience Groups and then sync them with your DMS Groups.

Considerations

- You can only associate one Mailchimp Audience with one DMS Group. Learn more about [how to use Mailchimp Audience Groups with multiple DMS Groups](#) in order to segment your Mailchimp list.
- Prior to syncing your DMS Contacts with Mailchimp, we strongly recommend that you **perform a backup of all of your Mailchimp subscribers.**

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Syncing a **Single** DMS Group with Mailchimp

1. Using your [Advanced Search for Contacts](#), add a [Group](#) or [Smart Group](#) in your DMS

Example: Create a Group of **all of your Contacts** in the DMS, filtering out whoever is flagged as *Do Not Email* and *NO BULK EMAILS*.

2. Once you've created your Group, on the [Manage Groups](#) page, select **Settings** for your desired Group

Wellness Avenue

Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail

Settings | Help

DMSCA DMSCA

Manage Groups

[Add Group](#)

Update Smart Group Counts

Show 25 entries

First Previous 1 2 3 4 Next Last

Name	Count	Created By	Description	Group Type	Visibility	Mailchimp Sync
<\$1000 Donors - All Time (Smart Group)	105	John Bonjovi			User and User Admin Only	Settings More
0-100 donors (Smart Group)	85	DMSCA DMSCA	Contribution Amount - greater than "0" AND less than "100"	Mailing List,	User and User Admin Only	Settings More
2021 donors (Smart Group)	78	DMSCA DMSCA	Date Received is This calendar year (between Jan 1st, 2021 12:00 AM and Dec-31st, 2021 11:59 PM)	Mailing List,	User and User Admin Only	Settings More
2021 Engaged Year-End Donors	2	DMSCA DMSCA	Donors who engaged with an email and made a donation between November 1 and December 31, 2021.	Mailing List,	User and User Admin Only	Settings More
2021 Engaged Year-End Subscribers	32	DMSCA DMSCA	Donors who engaged with an email in 2021	Mailing List,	User and User Admin Only	Settings More

Group settings

3. In the popup window that appears, under **Mailchimp Settings**, select from one of two options:

Group Settings: British Columbia

Group Title *

Created By

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

Mailchimp Settings

- No integration
- Membership Sync: Contacts in this group should be subscribed to a Mailchimp List
- Interest Sync: Contacts in this group should have an "Interest" set at Mailchimp

Parent Groups

Add Parent

» Contacts in this Group

[Cancel](#) [Save](#)

Mailchimp setting options

- **Membership Sync:** check this to sync the Contacts of this DMS Group with one of your **Mailchimp Audiences** on your Mailchimp account (most common scenario).
- **Interest Sync:** check this to sync the Contacts of this DMS Group with one of your **Mailchimp Audience Groups & Groups Names** on your Mailchimp account.

Option 1: Membership Sync

4. After selecting **Membership Sync**, associate this DMS Group with one of your **Mailchimp Audiences** by selecting from **Mailchimp List**

Group Settings: British Columbia

Group Title *

Created By White, Anne

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

^ Mailchimp Settings

No integration

Membership Sync: Contacts in this group should be subscribed to a Mailchimp List

Mailchimp List

Interest Sync: Contacts in this group should have an "interest" set at Mailchimp

Ensure list's webhook settings are correct at Mailchimp when saved.
If this is ticked when you press Save, CanadaHelps DMS will edit the webhook settings of this list at Mailchimp to make sure they're configured correctly. The only time you would want to *untick* this box is if you are doing some development on a local server because that would result in supplying an invalid webhook URL to a possibly production list at mailchimp. So basically leave this ticked, unless you know what you're doing :-)

Parent Groups ⓘ

Add Parent

» Contacts in this Group

Select Mailchimp List

5. Leave "Ensure the list's webhook settings are correct at Mailchimp when saved" **checked** for easier backend support

Group Settings: British Columbia 🖨️ ↻ ✕

Group Title*

Created By White, Anne

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

^ Mailchimp Settings

No integration

Membership Sync: Contacts in this group should be subscribed to a Mailchimp List

Mailchimp List

Interest Sync: Contacts in this group should have an "interest" set at Mailchimp

Ensure list's webhook settings are correct at Mailchimp when saved.

If this is ticked when you press Save, CanadaHelps DMS will edit the webhook settings of this list at Mailchimp to make sure they're configured correctly. The only time you would want to *untick* this box is if you are doing some development on a local server because that would result in supplying an invalid webhook URL to a possibly production list at mailchimp. So basically leave this ticked, unless you know what you're doing :-)

Parent Groups ⓘ

Add Parent

» Contacts in this Group

Verify Mailchimp webhook

6. When ready, select **Save** at the bottom right corner of the page.

Option 2: Audience Group Sync

4. After selecting **Interest Sync**, associate this DMS Group with:

- One of your **Mailchimp Audiences** by selecting from **Mailchimp List (1)**, and
- One of your **Mailchimp Audience Groups & Groups Names** by selecting a **Mailchimp Group (2)**

Group Settings: British Columbia

Group Title *

Created By White, Anne

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

Mailchimp Settings

No integration
 Membership Sync: Contacts in this group should be subscribed to a Mailchimp List
 Interest Sync: Contacts in this group should have an "interest" set at Mailchimp

Mailchimp List

Mailchimp Group

Subscribers are NOT able to update this grouping using Mailchimp
 Subscribers are able to update this grouping using Mailchimp

Parent Groups

Add Parent

» Contacts in this Group

Select Mailchimp interest

5. Then you can select between:

- **Subscribers are NOT able to update this grouping using Mailchimp** : check this if you want to block your Mailchimp subscribers from updating this Synced DMS Group. This way, only what you change in Mailchimp as an admin will be reflected in the DMS.
- **Subscribers are able to update this grouping using Mailchimp** : check this if you want to allow your Mailchimp subscribers to update this Synced DMS Group. This way, both your changes in MailChimp as an admin and from your Mailchimp subscribers (i.e. on a Mailchimp Form) will be reflected in the DMS.

Group Settings: British Columbia

Group Title *

Created By

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

^ Mailchimp Settings

No integration

Membership Sync: Contacts in this group should be subscribed to a Mailchimp List

Interest Sync: Contacts in this group should have an "Interest" set at Mailchimp

Mailchimp List

Mailchimp Group

Subscribers are NOT able to update this grouping using Mailchimp

Subscribers are able to update this grouping using Mailchimp

Parent Groups ⓘ

Add Parent

» Contacts in this Group

Mailchimp Subscriber update options

6. When ready, select **Save** at the bottom right corner of the page.

Syncing Multiple DMS Groups with Audiences & Audience Groups

If your charity uses [Mailchimp Audience Groups & Group Names](#) to further segment your Audiences, you can choose to sync these Audience Groups to equally segmented sub-Groups & Smart Groups in the DMS.

Note: These following steps allow you to sync DMS sub-groups with different Mailchimp Groups (segments), and is necessary if you only have one Mailchimp Audience and no Group segmentation.

Step 1: Sync a DMS Group with a Mailchimp Audience

1. Add a [Group](#) or [Smart Group](#)
2. On the [Manage Groups](#) page, select **Settings** for your desired Group

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Manage Groups

[Add Group](#)

Update Smart Group Counts

Show 25 entries

Name	Count	Created By	Description	Group Type	Visibility	Mailchimp Sync
<\$1000 Donors - All Time (Smart Group)	105	John Bonjovi			User and User Admin Only	Settings More
0-100 donors (Smart Group)	85	DMSCA DMSCA	Contribution Amount - greater than "0" AND less than "100"	Mailing List,	User and User Admin Only	Settings More
2021 donors (Smart Group)	78	DMSCA DMSCA	Date Received is This calendar year (between Jan 1st, 2021 12:00 AM and Dec 31st, 2021 11:59 PM)	Mailing List,	User and User Admin Only	Settings More
2021 Engaged Year-End Donors	2	DMSCA DMSCA	Donors who engaged with an email and made a donation between November 1 and December 31, 2021.	Mailing List,	User and User Admin Only	Settings More
2021 Engaged Year-End Subscribers	32	DMSCA DMSCA	Donors who engaged with an email in 2021	Mailing List,	User and User Admin Only	Settings More

Manage Groups page of the DMS

3. Under **Mailchimp Settings**, you'll have two options:

Group Settings: British Columbia

Group Title *

Created By White, Anne

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

Mailchimp Settings

- No integration
- Membership Sync: Contacts in this group should be subscribed to a Mailchimp List
- Interest Sync: Contacts in this group should have an "interest" set at Mailchimp

Parent Groups

Add Parent

» Contacts in this Group

[Cancel](#) [Save](#)

Mailchimp setting options

4. Select **Membership Sync** and associate this DMS Group with one of your **Mailchimp Audiences** by selecting from **Mailchimp List**

Group Settings: British Columbia

Group Title *

Created By

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

Mailchimp Settings

No integration

Membership Sync: Contacts in this group should be subscribed to a Mailchimp List

Mailchimp List

Interest Sync: Contacts in this group should have an "interest" set at Mailchimp

Ensure list's webhook settings are correct at Mailchimp when saved.
If this is ticked when you press Save, CanadaHelps DMS will edit the webhook settings of this list at Mailchimp to make sure they're configured correctly. The only time you would want to *untick* this box is if you are doing some development on a local server because that would result in supplying an invalid webhook URL to a possibly production list at mailchimp. So basically leave this ticked, unless you know what you're doing :-)

Parent Groups

Add Parent

» Contacts in this Group

Select MailChimp List

5. Leave "Ensure the list's webhook settings are correct at Mailchimp when saved" checked for easier backend support

Group Settings: British Columbia

Group Title *

Created By

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

Mailchimp Settings

No integration

Membership Sync: Contacts in this group should be subscribed to a Mailchimp List

Mailchimp List

Interest Sync: Contacts in this group should have an "interest" set at Mailchimp

Ensure list's webhook settings are correct at Mailchimp when saved.
If this is ticked when you press Save, CanadaHelps DMS will edit the webhook settings of this list at Mailchimp to make sure they're configured correctly. The only time you would want to *untick* this box is if you are doing some development on a local server because that would result in supplying an invalid webhook URL to a possibly production list at mailchimp. So basically leave this ticked, unless you know what you're doing :-)

Parent Groups

Add Parent

» Contacts in this Group

Verify Mailchimp webhook

6. When ready, select **Save** at the bottom right corner of the page.

Step 2: Add DMS Sub-Groups to the DMS Synced Group

7. Add a [Group](#) or [Smart Group](#)

8. On the [Manage Groups](#) page, select **Settings** for your desired Group

The screenshot shows the 'Manage Groups' page in the DMS interface. The page header includes the 'Wellness Avenue' logo and navigation links: Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. A 'Settings | Help' dropdown menu is visible in the top right corner, currently showing 'DMSCA DMSCA'. Below the header, there is a 'Manage Groups' section with an 'Add Group' button. A table of groups is displayed, with columns for Name, Count, Created By, Description, Group Type, Visibility, and Mailchimp Sync. The 'Settings' button for the first group is highlighted with a red box. A blue question mark icon is visible on the right side of the table.

Name	Count	Created By	Description	Group Type	Visibility	Mailchimp Sync
<\$1000 Donors - All Time (Smart Group)	105	John Bonjovi			User and User Admin Only	Contacts Settings More
0-100 donors (Smart Group)	85	DMSCA DMSCA	Contribution Amount - greater than "0" AND less than "100"	Mailing List	User and User Admin Only	Contacts Settings More
2021 donors (Smart Group)	78	DMSCA DMSCA	Date Received is This calendar year (between Jan 1st, 2021 12:00 AM and Dec 31st, 2021 11:59 PM)	Mailing List	User and User Admin Only	Contacts Settings More
2021 Engaged Year-End Donors	2	DMSCA DMSCA	Donors who engaged with an email and made a donation between November 1 and December 31, 2021.	Mailing List	User and User Admin Only	Contacts Settings More
2021 Engaged Year-End Subscribers	32	DMSCA DMSCA	Donors who engaged with an email in 2021	Mailing List	User and User Admin Only	Contacts Settings More

Manage Groups page in the DMS

9. Under **Parent Groups** > **Add Parent**, select the [DMS Group](#) that was previously synced with your Mailchimp Audience.

- This action will add the previous group as the **DMS Parent Group**, which will make the current group a sub-group under the Parent.

Group Settings: British Columbia

Group Title *

Created By White, Anne

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

Mailchimp Settings

No integration

Membership Sync: Contacts in this group should be subscribed to a Mailchimp List

Interest Sync: Contacts in this group should have an "interest" set at Mailchimp

Parent Groups

Add Parent

» Contacts in this Group

Parent Groups

10. Select **Save** at the bottom right

Step 3: Sync the DMS Sub-Group with the Mailchimp Audience Group

11. Back on the *Manage Groups* page, **your Parent Group and Sub-Group** should look like this:

Wellness Avenue | Dashboard | **Contacts** | Contributions | Campaigns | Opportunities | Reports | DMS Mail | DMS Charity Admin

Manage Groups

Show 100 entries | Update Smart Group Counts

Name	Count	Created By	Description	Group Type	Visibility	Mailchimp Sync
Administrators	1		Contacts in this group are assigned Administrator role permissions.	Access Control	User and User Admin Only	Contacts Settings
Annual Donors 0-250 (Smart Group)	unknown	Admin, DMS Charity		Mailing List	User and User Admin Only	Contacts Settings
British Columbia	unknown	White, Anne		..	User and User Admin Only	Contacts Settings
Sub Group (Smart Group)	unknown	Admin, DMS Charity		Mailing List	User and User Admin Only	Contacts Settings

Manage Groups page Groups and Sub-Groups

12. Select **Settings** for your **Sub-Group**

13. Then, under Mailchimp Settings:

- (1) Select **Interest Sync**,
- (2) Associate the same MailChimp Audience on **Mailchimp List**,

(3) Associate your desired Audience Groups & Group Names on **Mailchimp Group**, and

(4) Select your subscriber preferences.

Group Settings: Sub Group (Smart Group)

Group Title * Sub Group (Smart Group) (Smart Group)

Created By Admin, DMS Charity

Modified By Admin, DMS Charity

Group Description

Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.

Mailchimp Settings

No integration

Membership Sync: Contacts in this group should be subscribed to a Mailchimp List

Interest Sync: Contacts in this group should have an "Interest" set at Mailchimp 1

Mailchimp List DMS Integration 2

Mailchimp Group Interest 1::Group 1-1 3

Subscribers are NOT able to update this grouping using Mailchimp

Subscribers are able to update this grouping using Mailchimp 4

Parent Groups

Remove Parent?

British Columbia

Cancel Save

Mailchimp settings for Sub-Groups

14. Select **Save** at the bottom right

15. Repeat the same process for each **Mailchimp Audience Group & Group Names (segments)** that you have under a single Audience.