Zapier: Mailchimp Emails to Notes

REST API · https://mriacrm.com/docs/rest-api-zapier-mailchimp-emails-to-notes/

Zapier can call the Mria CRM REST API, but only through a Zapier step that speaks OAuth 2.0. This page walks through one complete use case, logging an email campaign as a note on the matching contact, and every screen you pass on the way. The same connection and request steps work for any other endpoint in the OpenAPI spec.

Before you start

- The API uses **Atlassian OAuth 2.0 (3LO)** only. There are no API keys, so the plain *Webhooks by Zapier* action cannot authenticate: it supports basic auth and nothing else.
- Use **API by Zapier** instead. It is available on Zapier's Professional, Team and Enterprise plans (a new account gets a 14-day Professional trial), creates an OAuth2 *connection*, and then runs an *API Request* action per call.
- Complete REST API: Setup first, or follow the Atlassian steps below. The person who creates the OAuth integration must have a verified Atlassian account in the organization that owns the site.
- Everything Zapier writes runs as the user who connected the account and is limited by that user's CRM role.

The use case

A marketing tool sends a campaign. For every recipient who is a contact in Mria CRM, the sales team wants a note on the contact saying which email went out and when. In Zapier this is three steps:

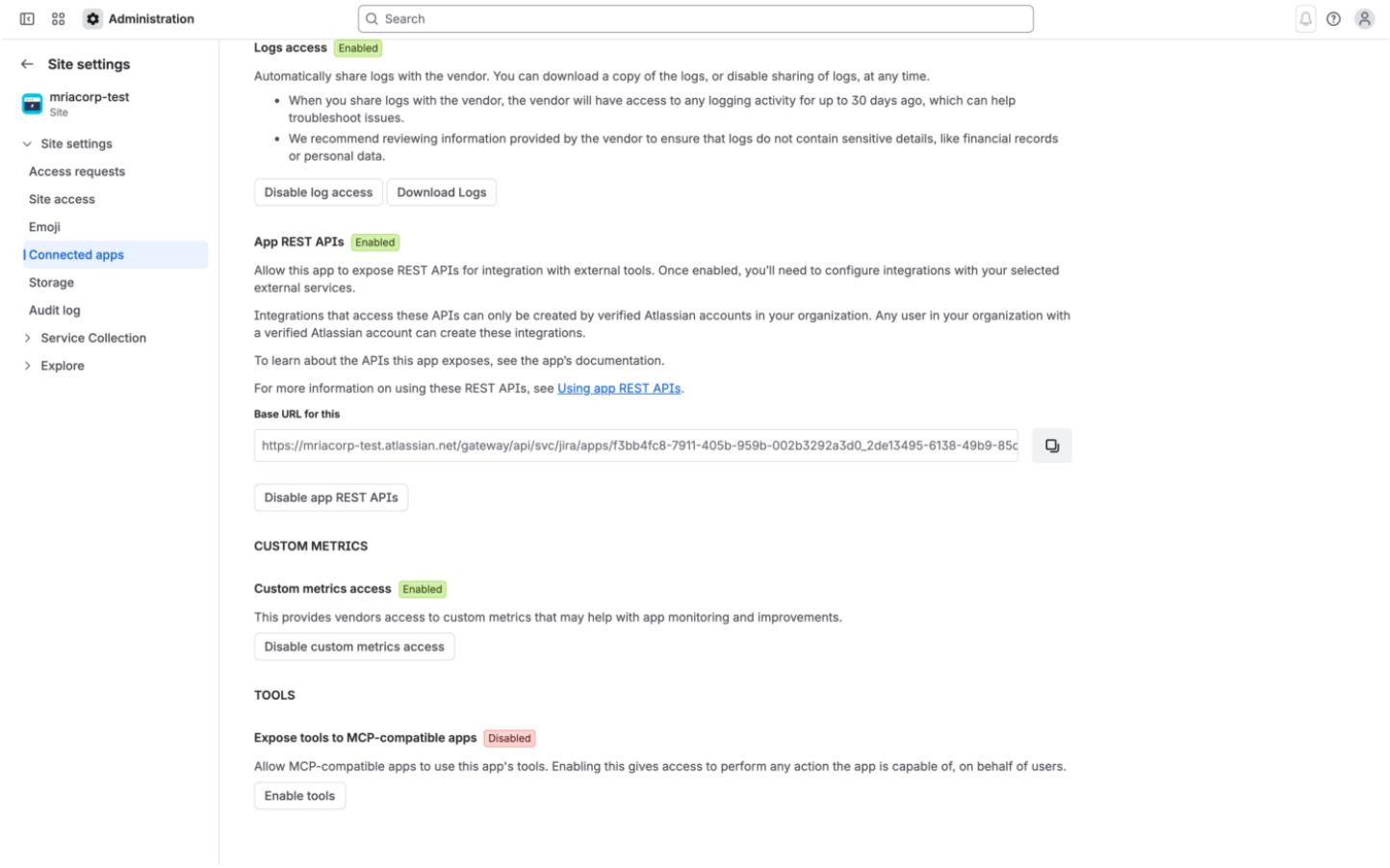
1. **Trigger**: the source app reports the sent email with the recipient's address and the subject. The example uses a *Catch Hook* trigger fed with a sample payload, so the screenshots are tool-neutral; with Mailchimp the trigger would be *New Campaign*, *Email Opened* or *Link Clicked*.
2. **Find the contact**: `POST /contacts/search` with the recipient's email as the search term.
3. **Add the note**: `POST /contacts/{contactId}/notes` with the subject in the note text.

The API has no Emails endpoint. External emails can be stored as **Notes** on a Contact, Lead or Deal; they appear in the record's Notes section and on its timeline, not under the Emails tab, which is reserved for the Gmail and Outlook connectors.

Part 1: Atlassian side

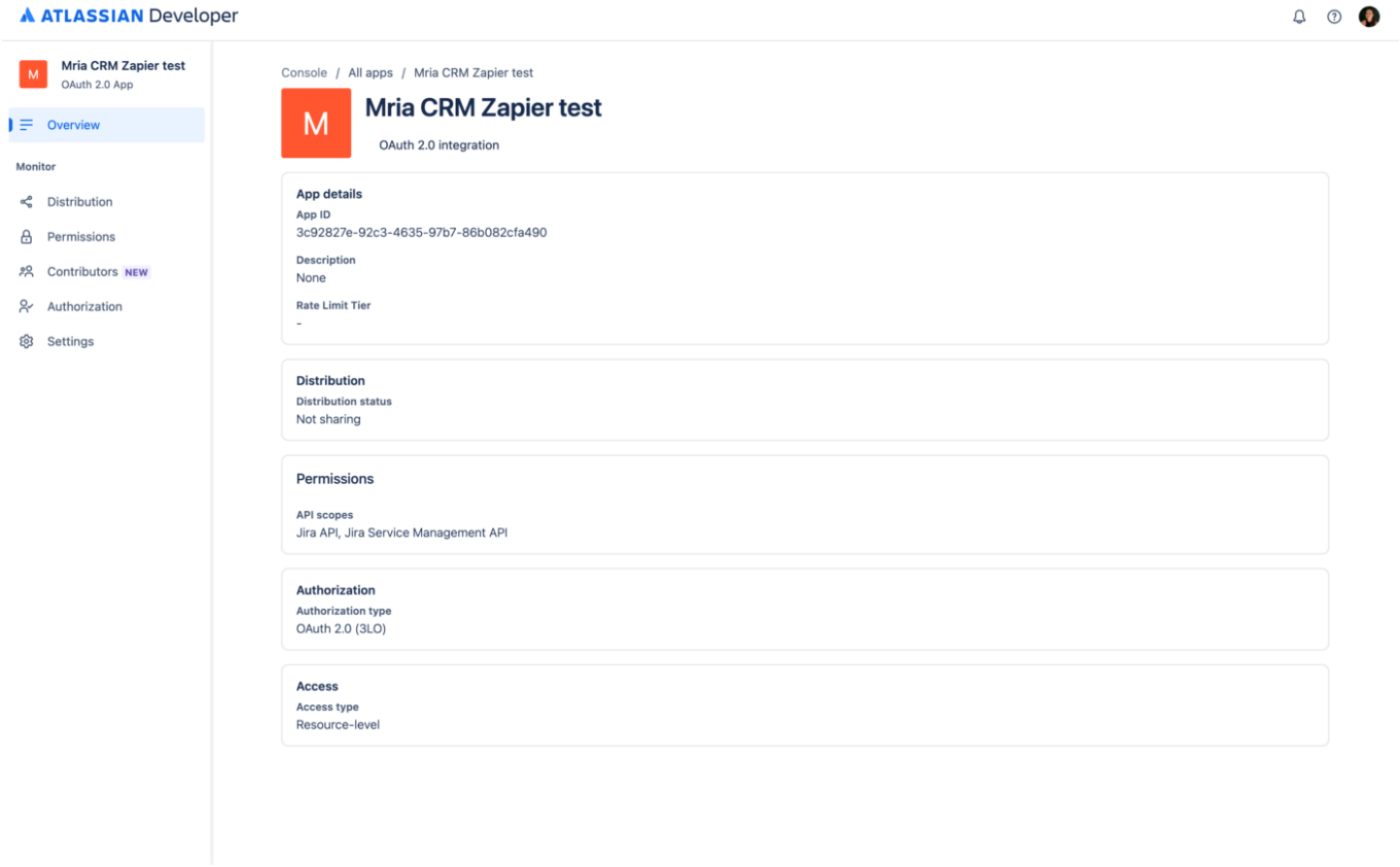
1. Enable App REST APIs on the site

A site admin opens **admin.atlassian.com → your site → Connected apps → Mria CRM → View app details** and enables **App REST APIs**. Copy the **Base URL** shown there: it contains the `appId_envId` segment you will need in every Zapier request.



2. Create the OAuth 2.0 integration

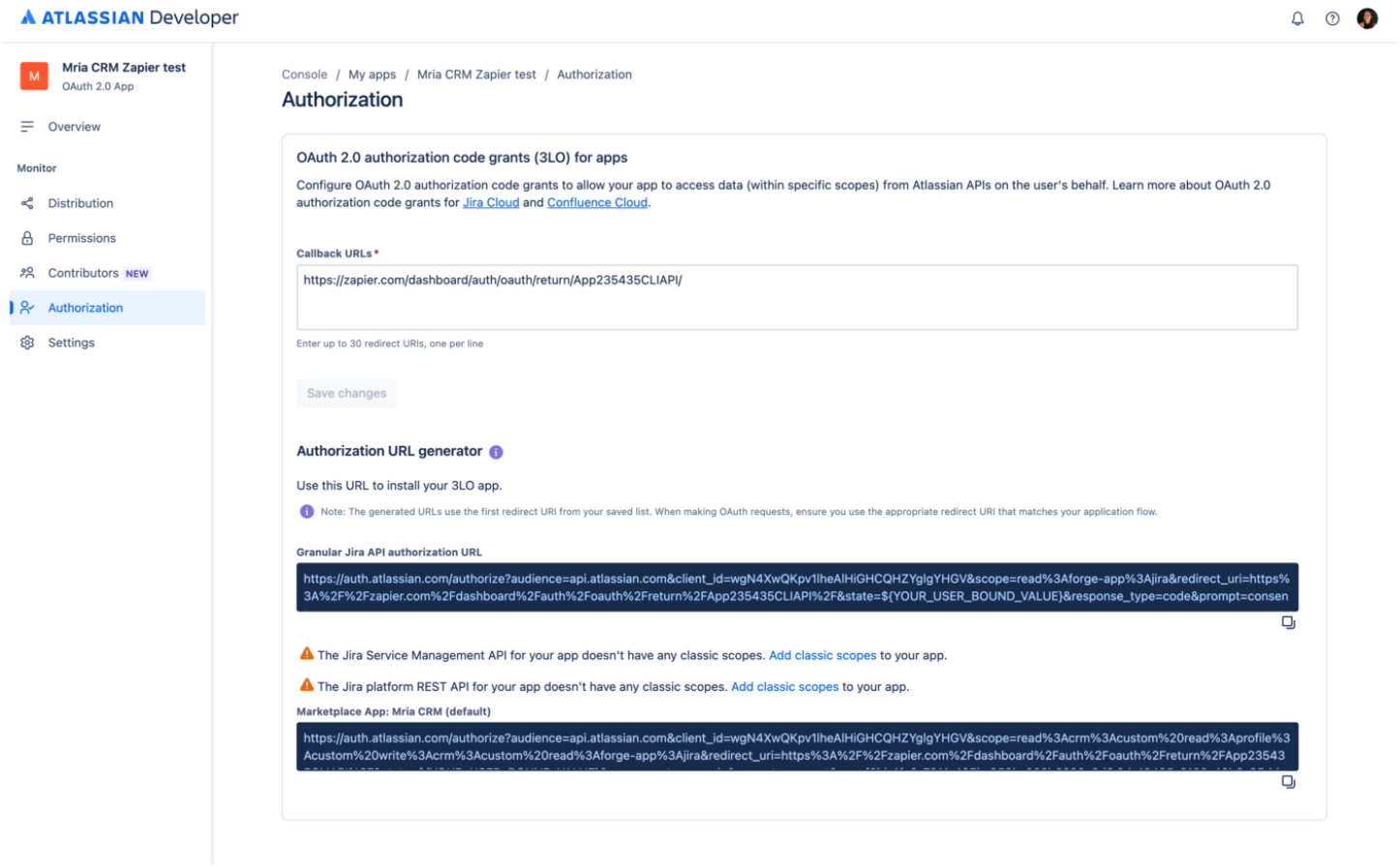
In the Developer console choose **Create → OAuth 2.0 integration**, give it a name and keep the **Resource-level** access type.



3. Register Zapier's callback URL

Open **Authorization → OAuth 2.0 (3LO) → Add** and add exactly this callback URL. It is the same for every API by Zapier connection:

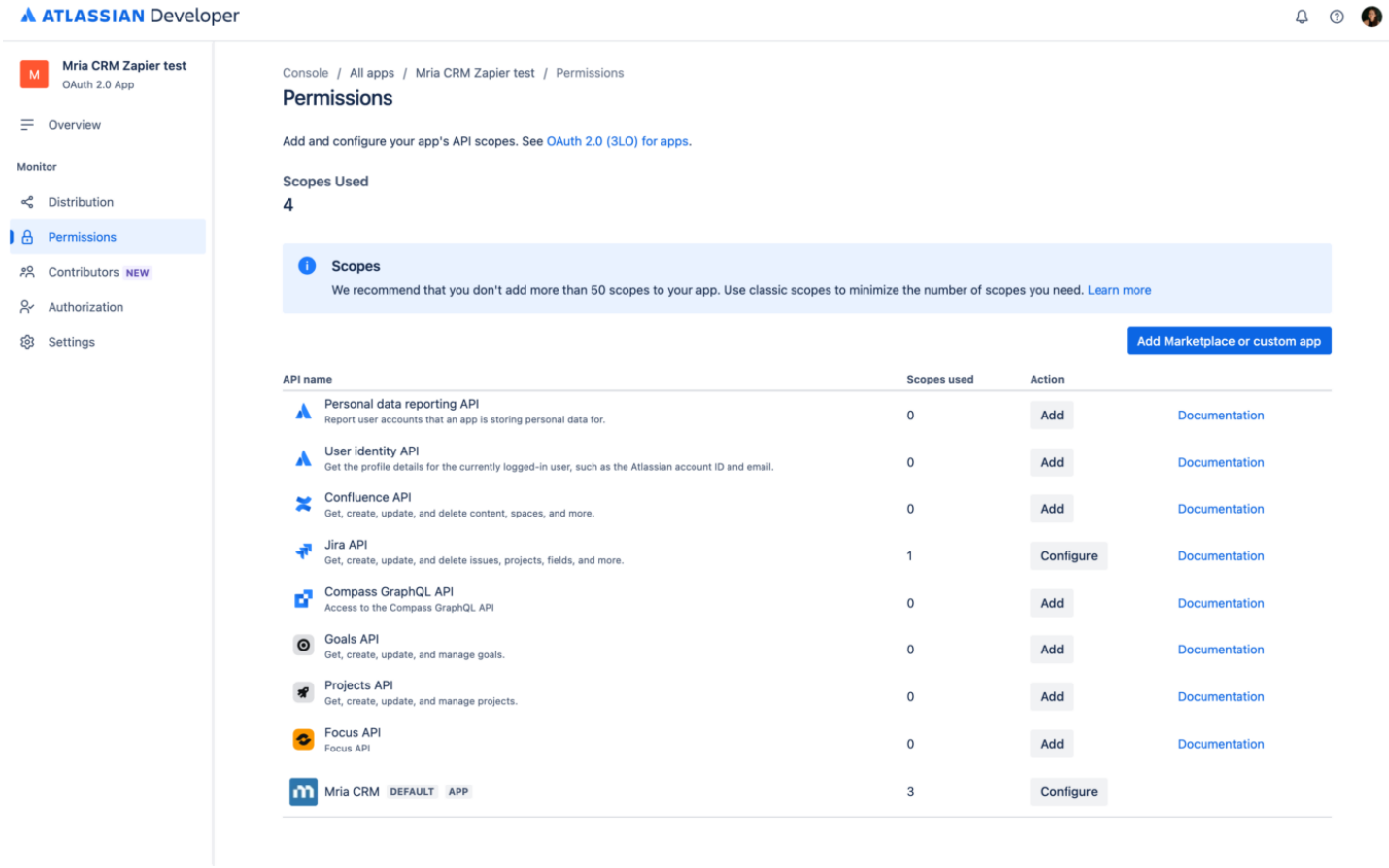
```
https://zapier.com/dashboard/auth/oauth/return/App235435CLIAPI/
```

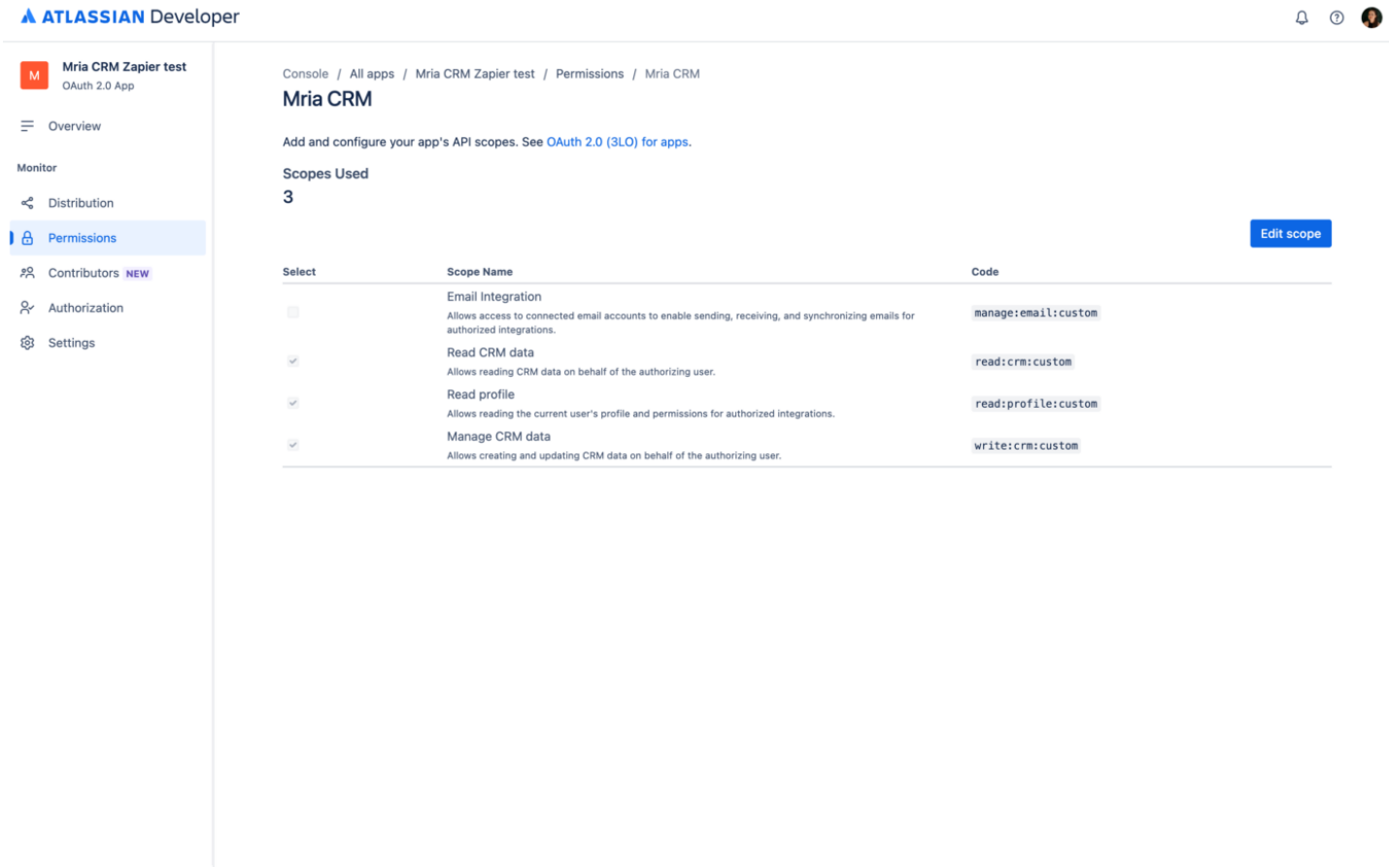


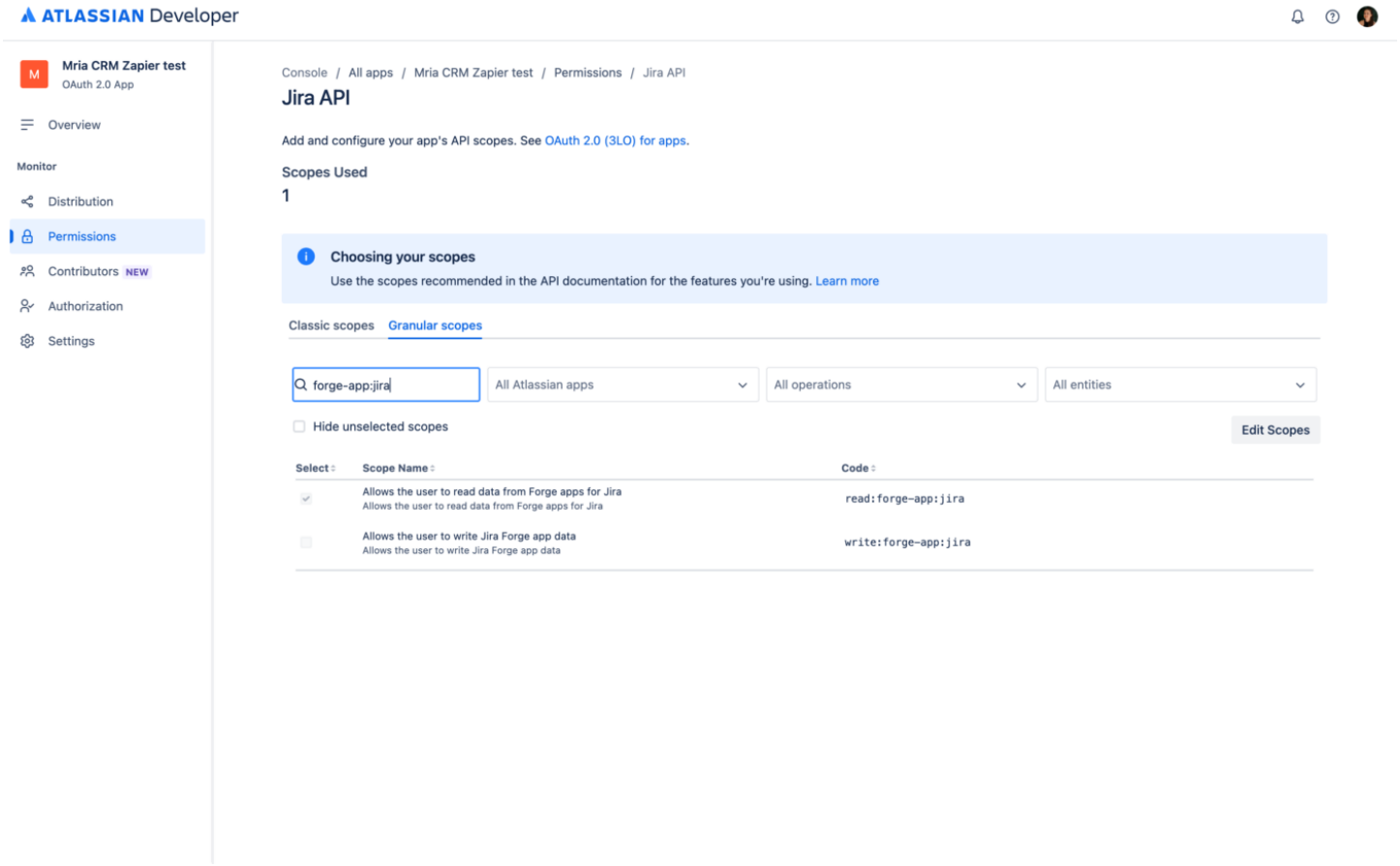
4. Add the scopes

Under **Permissions**:

1. **Add Marketplace or custom app** → your site → **Mria CRM** → tick `read:crm:custom`, `write:crm:custom` and `read:profile:custom`. If the site has several Mria CRM installs, pick the one whose environment matches your Base URL.
2. **Jira API → Add → Configure → Granular scopes** → tick `read:forge-app:jira`.

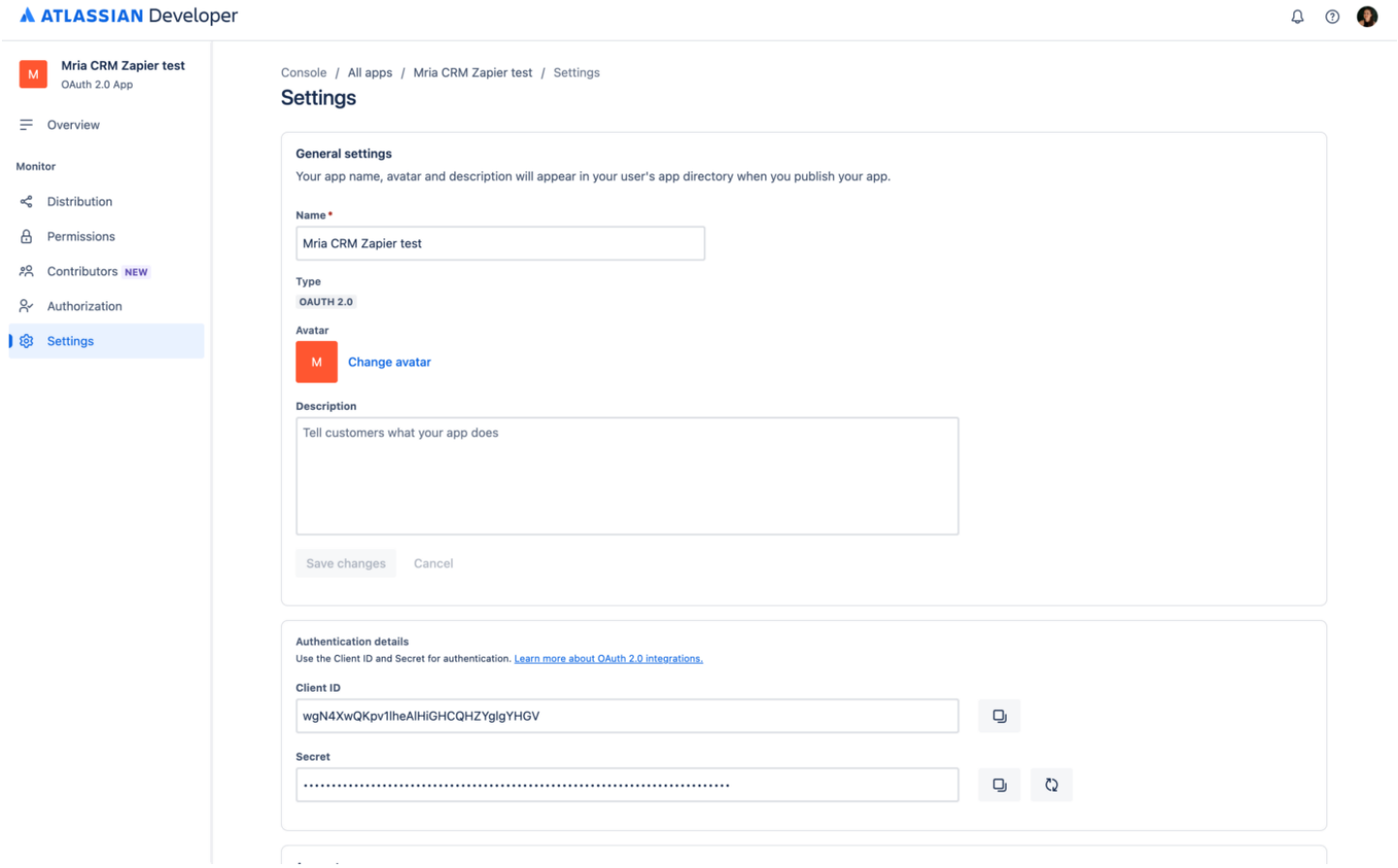

ATLASSIAN Developer
Mria CRM Zapier test
OAuth 2.0 App
Overview
Monitor
Distribution
Permissions
Contributors NEW
Authorization
Settings
Console / All apps / Mria CRM Zapier test / Permissions
Permissions
Add and configure your app's API scopes. See OAuth 2.0 (3LO) for apps.
Scopes Used
4
Scopes
We recommend that you don't add more than 50 scopes to your app. Use classic scopes to minimize the number of scopes you need. Learn more
Add Marketplace or custom app
API name
Scopes used
Action
Personal data reporting API
Report user accounts that an app is storing personal data for.
0
Add
Documentation
User identity API
Get the profile details for the currently logged-in user, such as the Atlassian account ID and email.
0
Add
Documentation
Confluence API
Get, create, update, and delete content, spaces, and more.
0
Add
Documentation
Jira API
Get, create, update, and delete issues, projects, fields, and more.
1
Configure
Documentation
Compass GraphQL API
Access to the Compass GraphQL API
0
Add
Documentation
Goals API
Get, create, update, and manage goals.
0
Add
Documentation
Projects API
Get, create, update, and manage projects.
0
Add
Documentation
Focus API
Focus API
0
Add
Documentation
Mria CRM DEFAULT APP
3
Configure


ATLASSIAN Developer
Mria CRM Zapier test
OAuth 2.0 App
Overview
Monitor
Distribution
Permissions
Contributors NEW
Authorization
Settings
Console / All apps / Mria CRM Zapier test / Permissions / Mria CRM
Mria CRM
Add and configure your app's API scopes. See OAuth 2.0 (3LO) for apps.
Scopes Used
3
Edit scope
Select
Scope Name
Code
Email Integration
Allows access to connected email accounts to enable sending, receiving, and synchronizing emails for authorized integrations.
manage:email:custom
Read CRM data
Allows reading CRM data on behalf of the authorizing user.
read:crm:custom
Read profile
Allows reading the current user's profile and permissions for authorized integrations.
read:profile:custom
Manage CRM data
Allows creating and updating CRM data on behalf of the authorizing user.
write:crm:custom



5. Copy the client credentials

On **Settings** copy the **Client ID** and the **Secret**. You paste both into Zapier in the next part.



Part 2: Zapier side

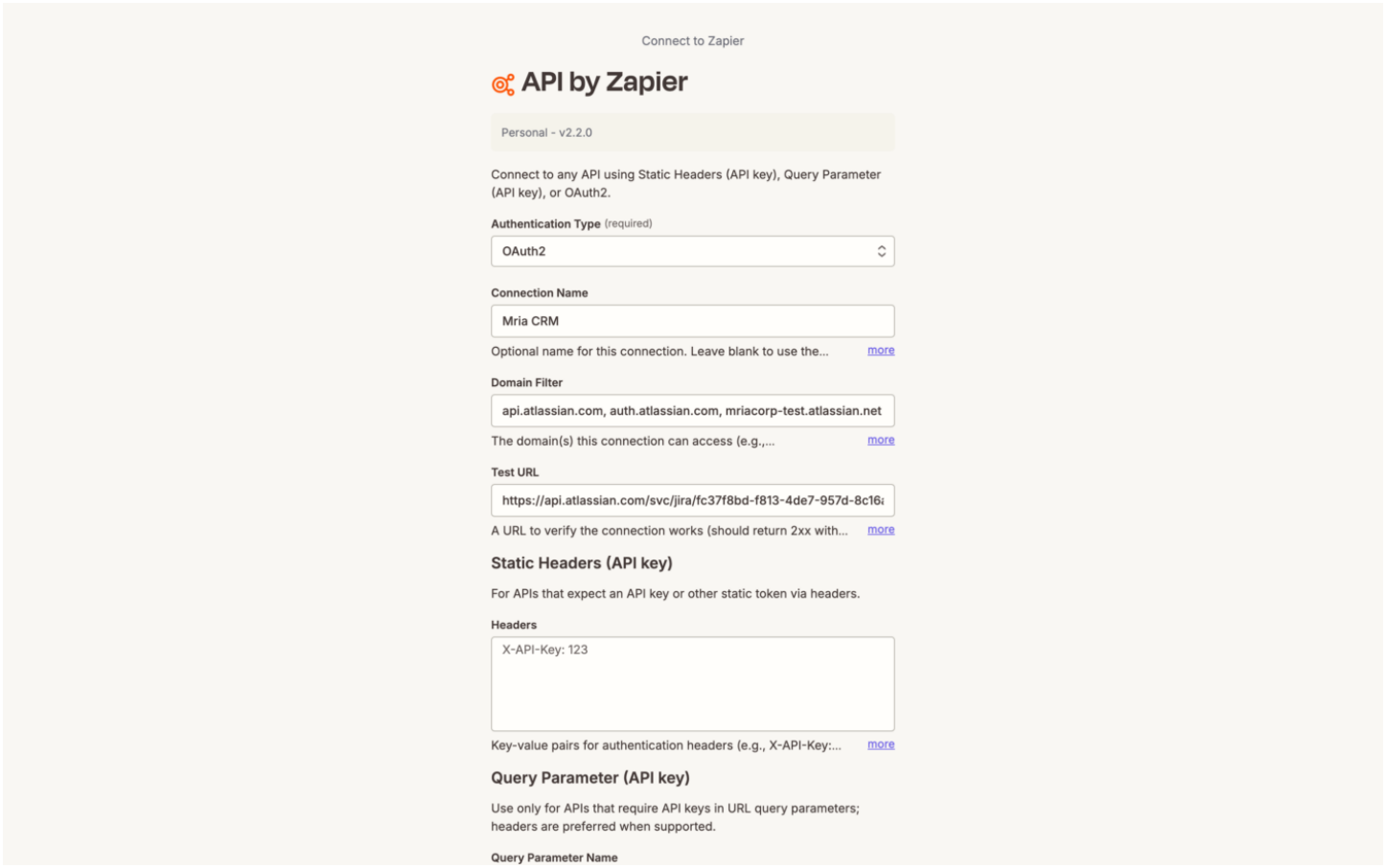
6. Create the API by Zapier connection

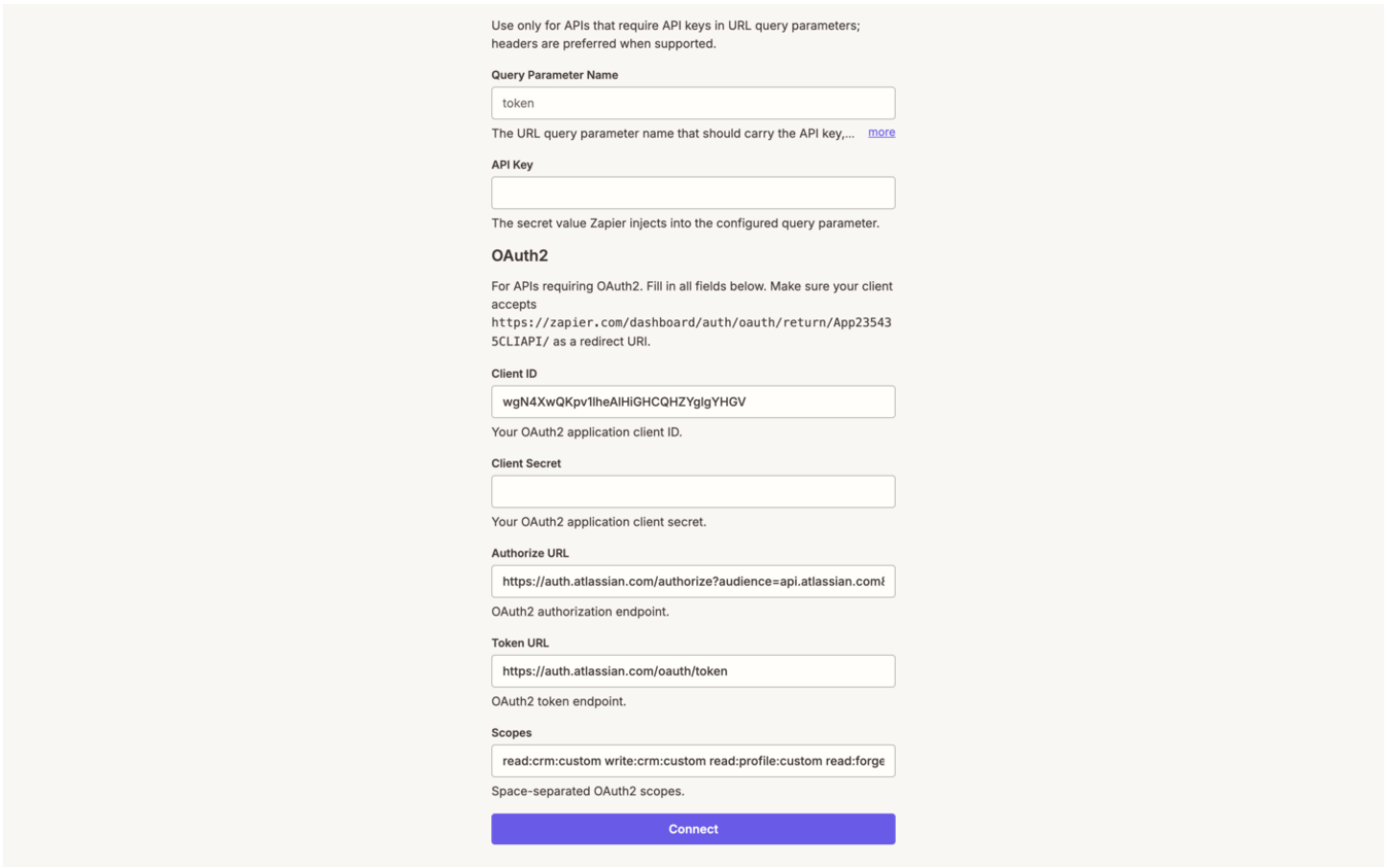
In Zapier open **App connections → Create connection**, search for **API by Zapier** and set **Authentication Type** to **OAuth2**. Fill the form with the values below; `<cloudId>`, `<appId>` and `<envId>` come from the Base URL in step 1, and the app id is the same on every site: `f3bb4fc8-7911-405b-959b-002b3292a3d0`.

Field	Value
Connection Name	Any name, for example Mria CRM
Domain Filter	`api.atlassian.com, auth.atlassian.com, <your-site>.atlassian.net`
Test URL	`https://api.atlassian.com/svc/jira/<cloudId>/apps/<appId>_<envId>/v1/me`

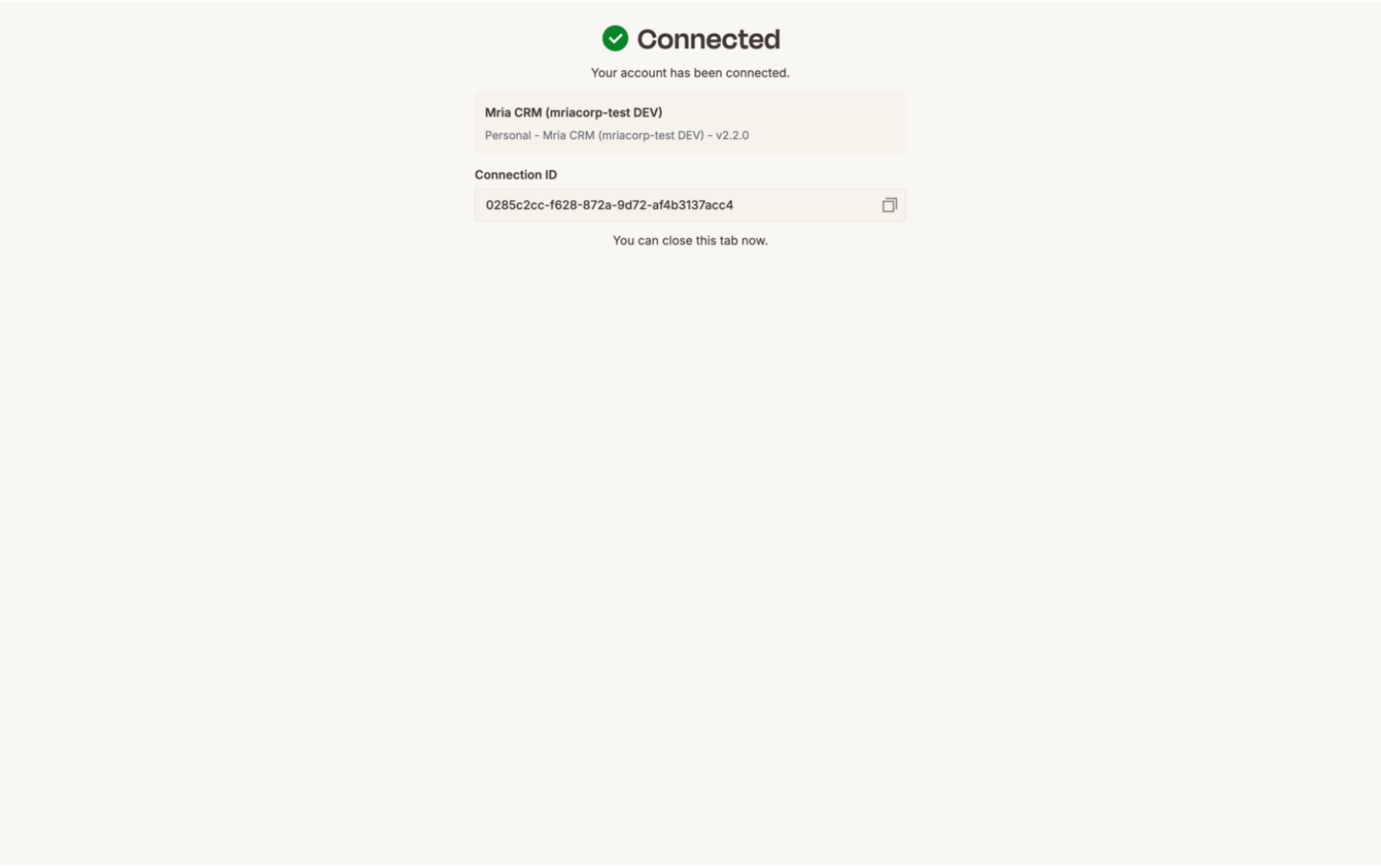
Field	Value
Client ID / Client Secret	From step 5
Authorize URL	`https://auth.atlassian.com/authorize?audience=api.atlassian.com&prompt=consent&sns=<appId>.<env`
Token URL	`https://auth.atlassian.com/oauth/token`
Scopes	`read:crm:custom write:crm:custom read:profile:custom read:forge-app:jira offline_access`

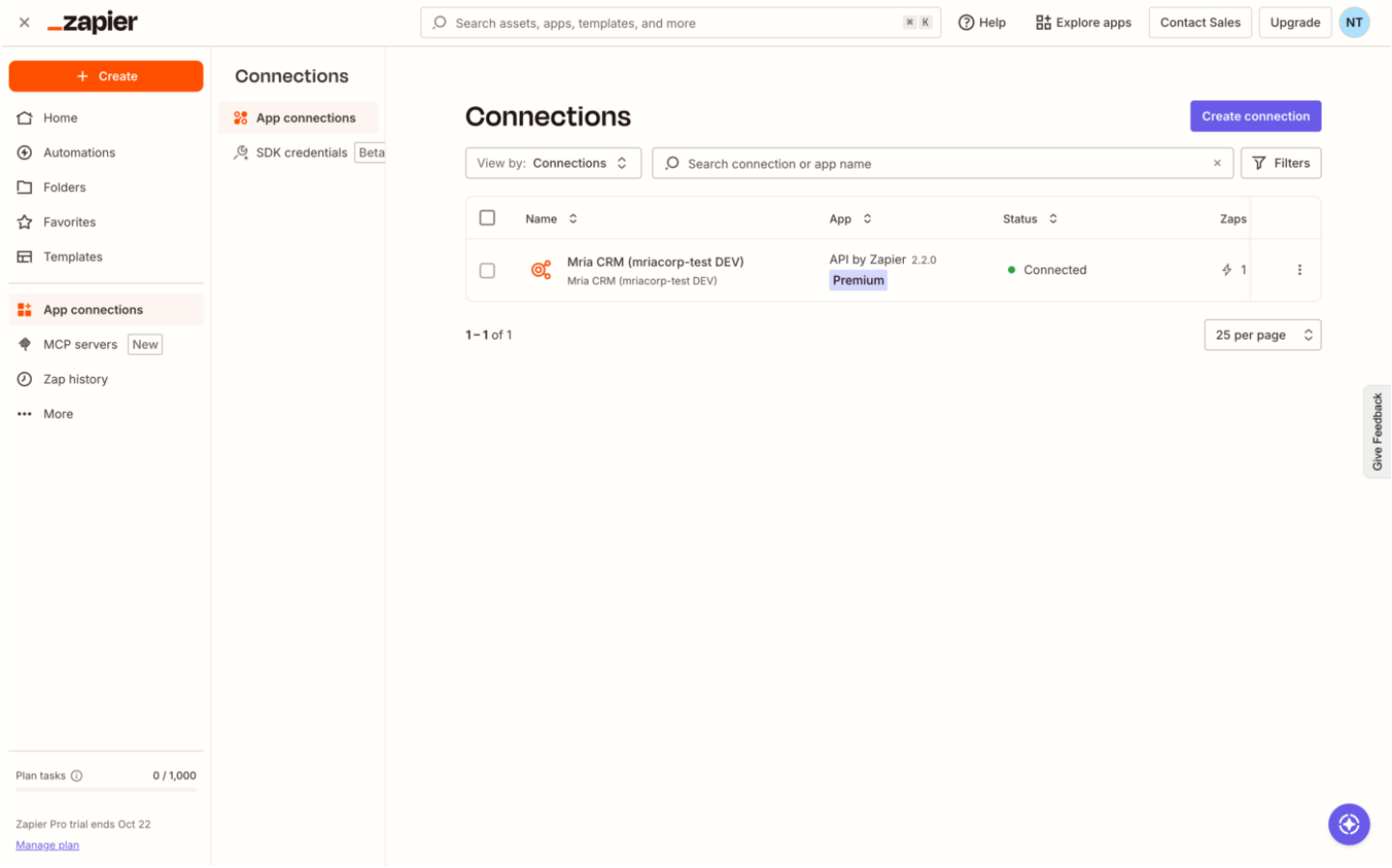
Three details are easy to miss. The Authorize URL must carry `audience`, `prompt=consent` and `sns=<appId>.<envId>` (the environment joined with a dot, not the underscore used in the path). The scope list must include `offline_access`, which is what lets Zapier refresh the one-hour access token. And the `sns` environment, the `envId` in your request URLs and the install you ticked in step 4 must all be the same environment, or every call answers `401 Unauthorized; scope does not match`.


Connect to Zapier
API by Zapier
Personal - v2.2.0
Connect to any API using Static Headers (API key), Query Parameter (API key), or OAuth2.
Authentication Type (required)
OAuth2
Connection Name
Mria CRM
Optional name for this connection. Leave blank to use the...
more
Domain Filter
api.atlassian.com, auth.atlassian.com, mriacorp-test.atlassian.net
The domain(s) this connection can access (e.g.,...
more
Test URL
https://api.atlassian.com/svc/jira/fc37f8bd-f813-4de7-957d-8c16
A URL to verify the connection works (should return 2xx with...
more
Static Headers (API key)
For APIs that expect an API key or other static token via headers.
Headers
X-API-Key: 123
Key-value pairs for authentication headers (e.g., X-API-Key:...
more
Query Parameter (API key)
Use only for APIs that require API keys in URL query parameters; headers are preferred when supported.
Query Parameter Name


Use only for APIs that require API keys in URL query parameters; headers are preferred when supported.
Query Parameter Name
token
The URL query parameter name that should carry the API key,...
more
API Key
The secret value Zapier injects into the configured query parameter.
OAuth2
For APIs requiring OAuth2. Fill in all fields below. Make sure your client accepts
https://zapier.com/dashboard/auth/oauth/return/App23543 5CLIAPI/ as a redirect URI.
Client ID
wgN4XwQKpv1IheAlHiGHCQHZYgIgYHGV
Your OAuth2 application client ID.
Client Secret
Your OAuth2 application client secret.
Authorize URL
https://auth.atlassian.com/authorize?audience=api.atlassian.com
OAuth2 authorization endpoint.
Token URL
https://auth.atlassian.com/oauth/token
OAuth2 token endpoint.
Scopes
read:crm:custom write:crm:custom read:profile:custom read:forge
Space-separated OAuth2 scopes.
Connect

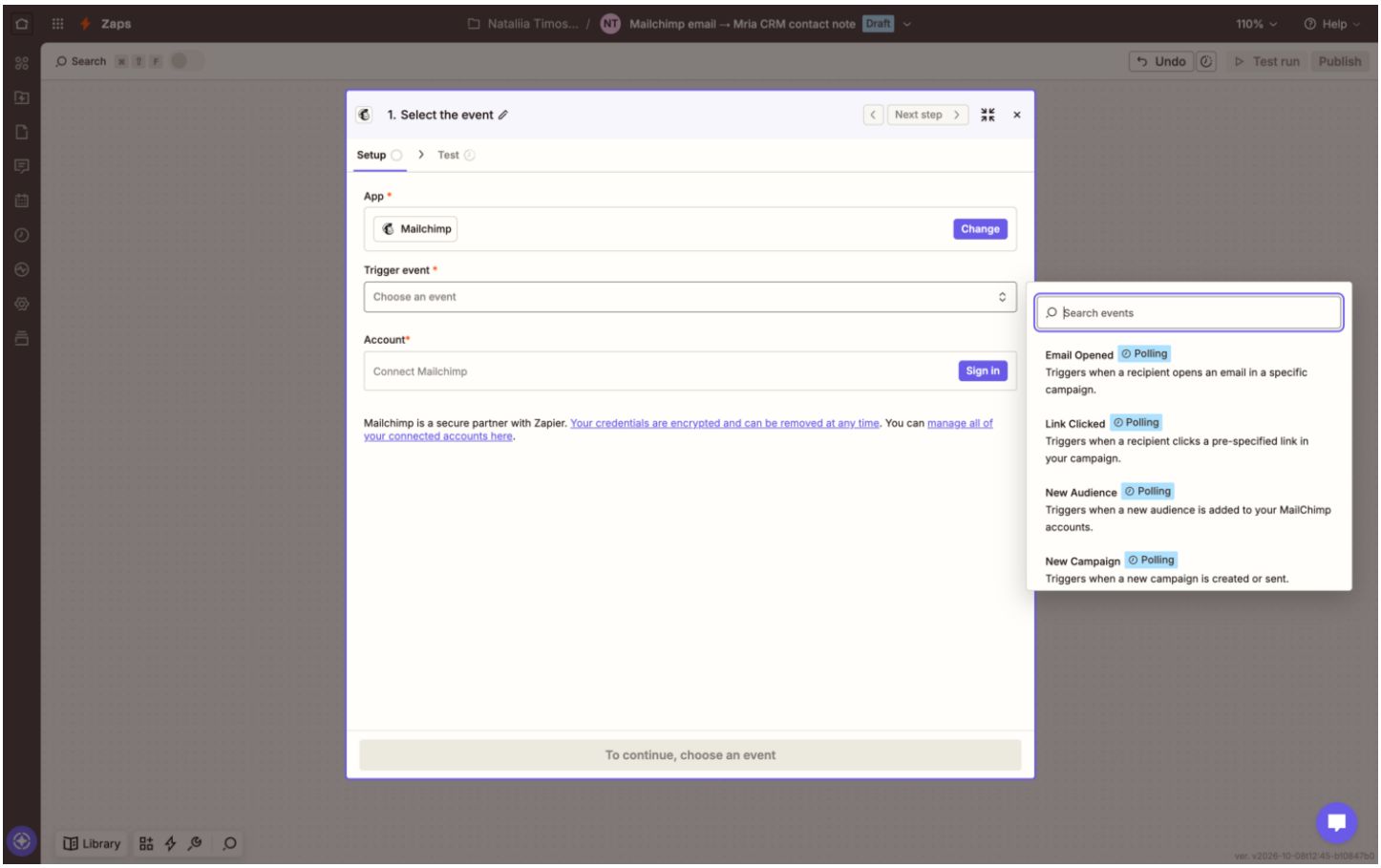
Press **Connect**. Atlassian shows its consent screen; choose the site and accept. Zapier then calls the Test URL and reports the connection as **Connected**.



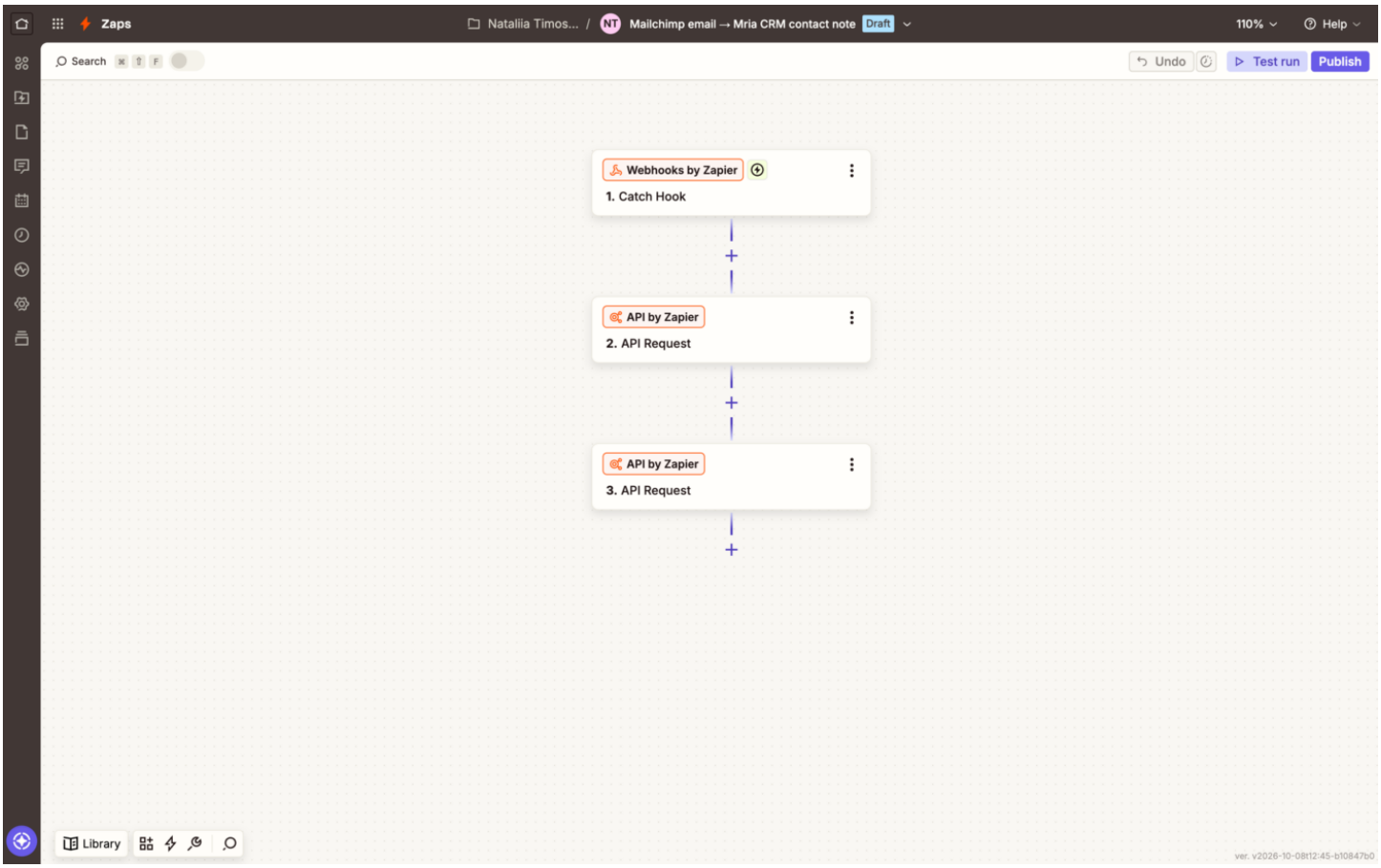


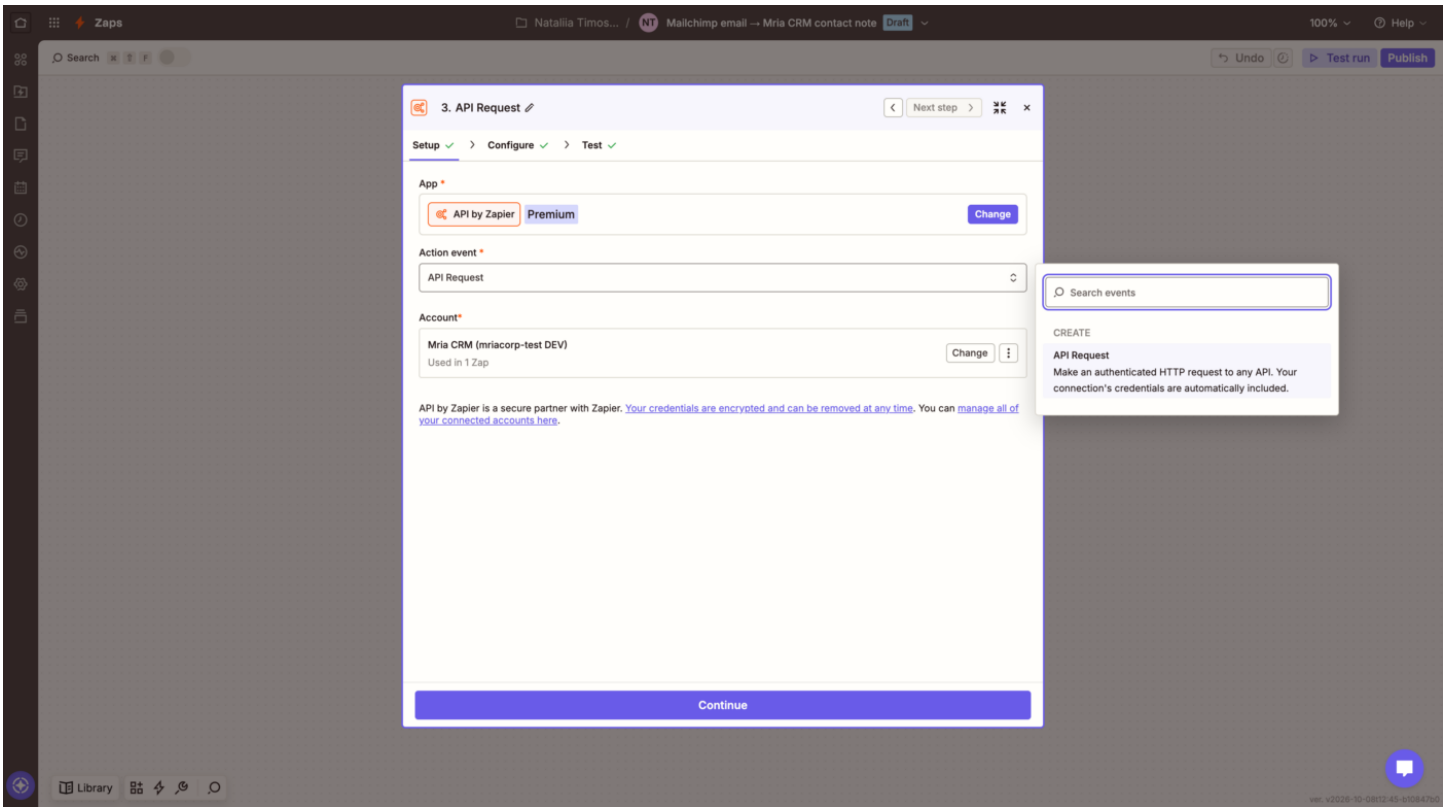
7. Build the Zap

Create a Zap and pick the trigger of your source app. For Mailchimp, Zapier offers these events; note that there is no per-recipient "email sent" event, so a campaign-level trigger is the usual choice.



The finished Zap has the trigger and two **API by Zapier → API Request** actions. Each action uses the connection from step 6, so you never set an Authorization header yourself: Zapier adds the bearer token to every request.

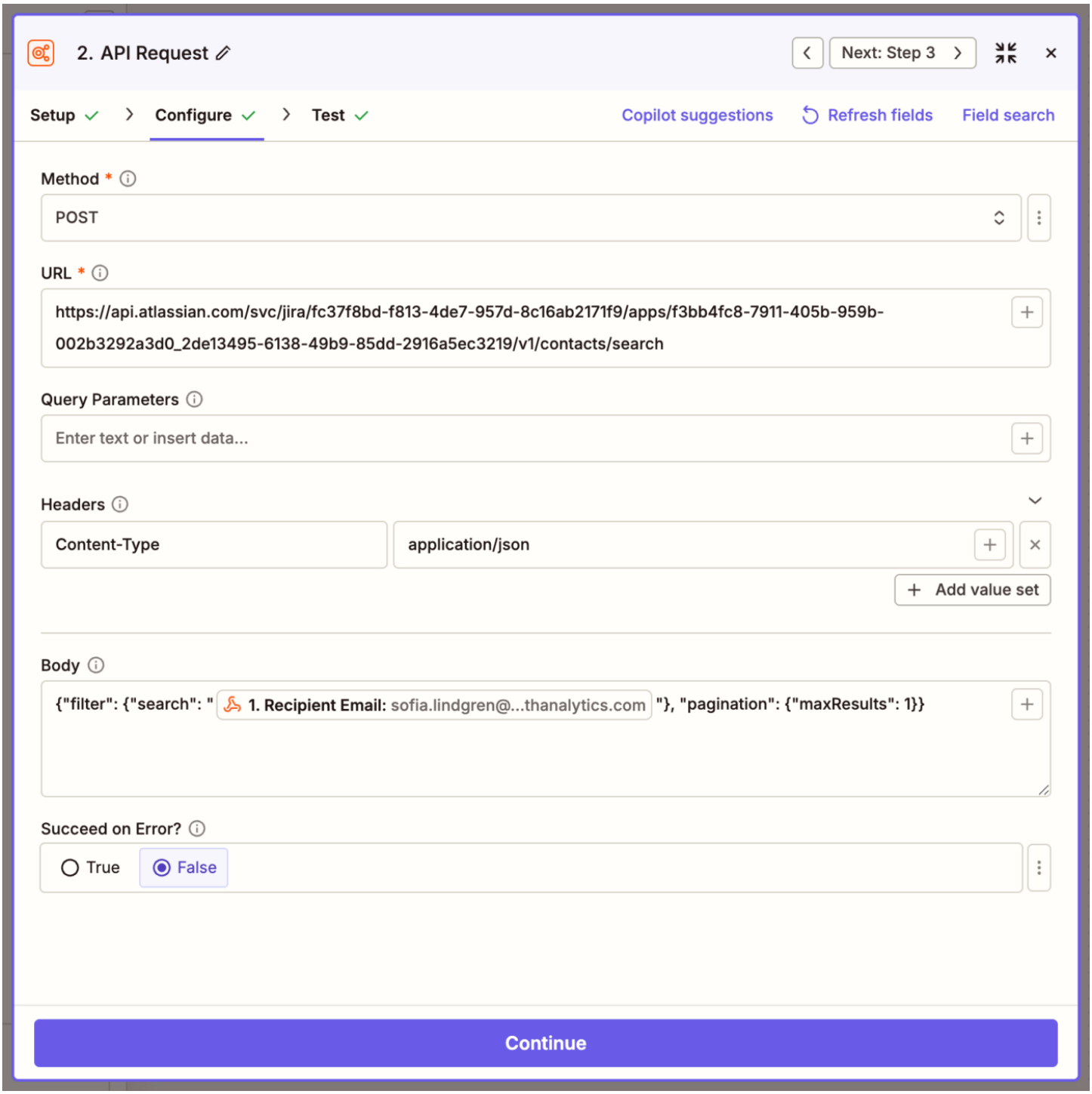

Zaps
Nataliia Timos... / Mailchimp email → Mria CRM contact note Draft
110%
Help
Search
Undo
Test run
Publish
Webhooks by Zapier
1. Catch Hook
API by Zapier
2. API Request
API by Zapier
3. API Request
Library

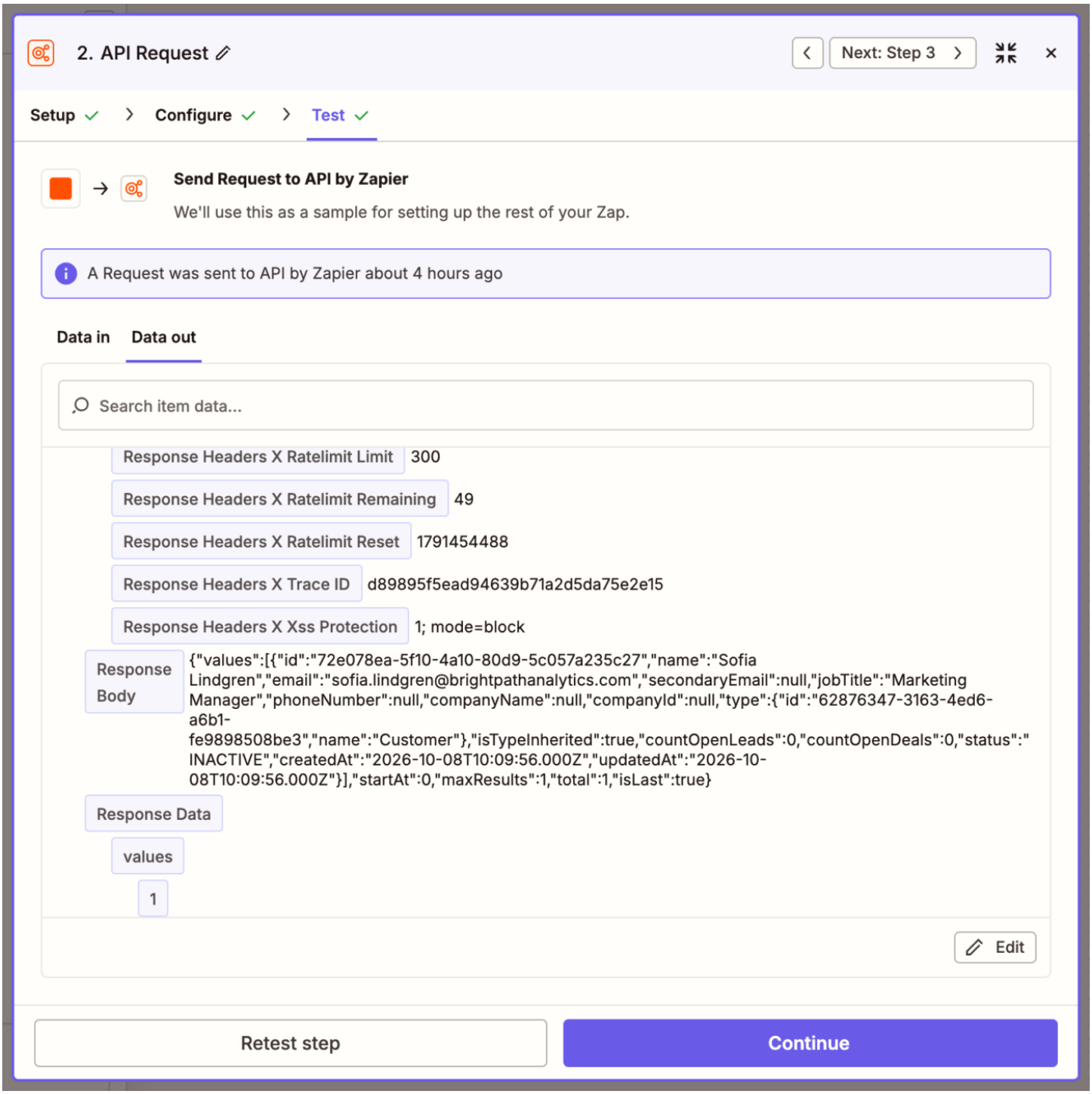

Zaps
Nataliia Timos... / Mailchimp email → Mria CRM contact note Draft
100%
Help
Search
Undo
Test run
Publish
3. API Request
Next step
Setup
Configure
Test
App *
API by Zapier
Premium
Change
Action event *
API Request
Account*
Mria CRM (mriacorp-test DEV)
Used in 1 Zap
Change
API by Zapier is a secure partner with Zapier. Your credentials are encrypted and can be removed at any time. You can manage all of your connected accounts here.
Search events
CREATE
API Request
Make an authenticated HTTP request to any API. Your connection's credentials are automatically included.
Continue
Library

8. Action: find the contact

Field	Value
Method	POST
URL	`https://api.atlassian.com/svc/jira/<cloudId>/apps/<appId>_<envId>/v1/contacts/search`
Headers	`Content-Type` = `application/json`
Body	`{"filter": {"search": "<recipient email from the trigger>"}, "pagination": {"maxResults": 1}}`

Insert the trigger's email field into the body with the **+** button next to the field. The test returns the matching contact; its `values[0].id` (shown by Zapier as *Response Data Values ID*) is what the next step needs.


2. API Request
Next: Step 3
Setup
Configure
Test
Copilot suggestions
Refresh fields
Field search
Method *
POST
URL *
https://api.atlassian.com/svc/jira/fc37f8bd-f813-4de7-957d-8c16ab2171f9/apps/f3bb4fc8-7911-405b-959b-002b3292a3d0_2de13495-6138-49b9-85dd-2916a5ec3219/v1/contacts/search
Query Parameters
Enter text or insert data...
Headers
Content-Type
application/json
Add value set
Body
{"filter": {"search": " 1. Recipient Email: sofia.lindgren@...thanalytics.com "}, "pagination": {"maxResults": 1}}
Succeed on Error?
True
False
Continue

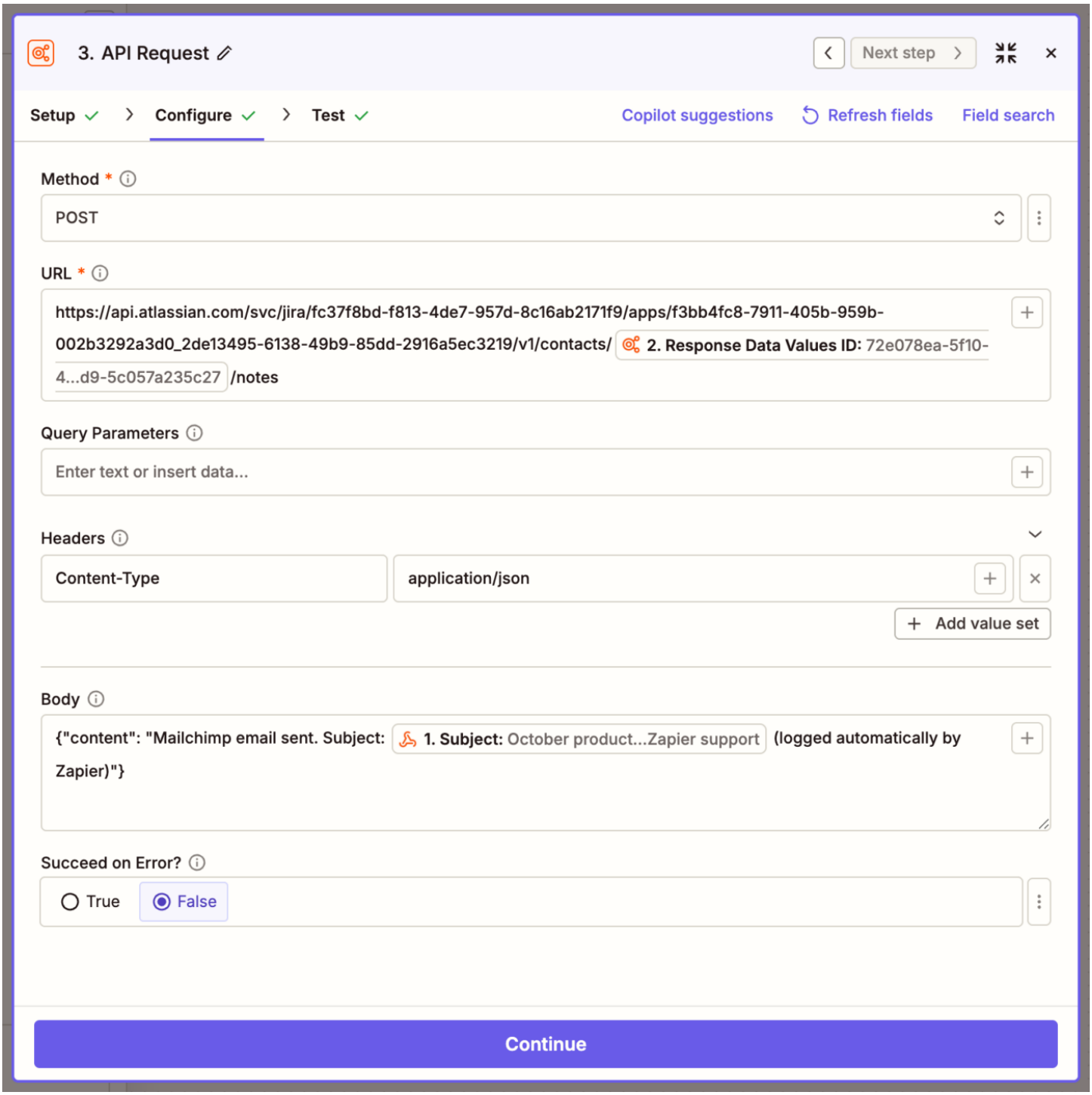


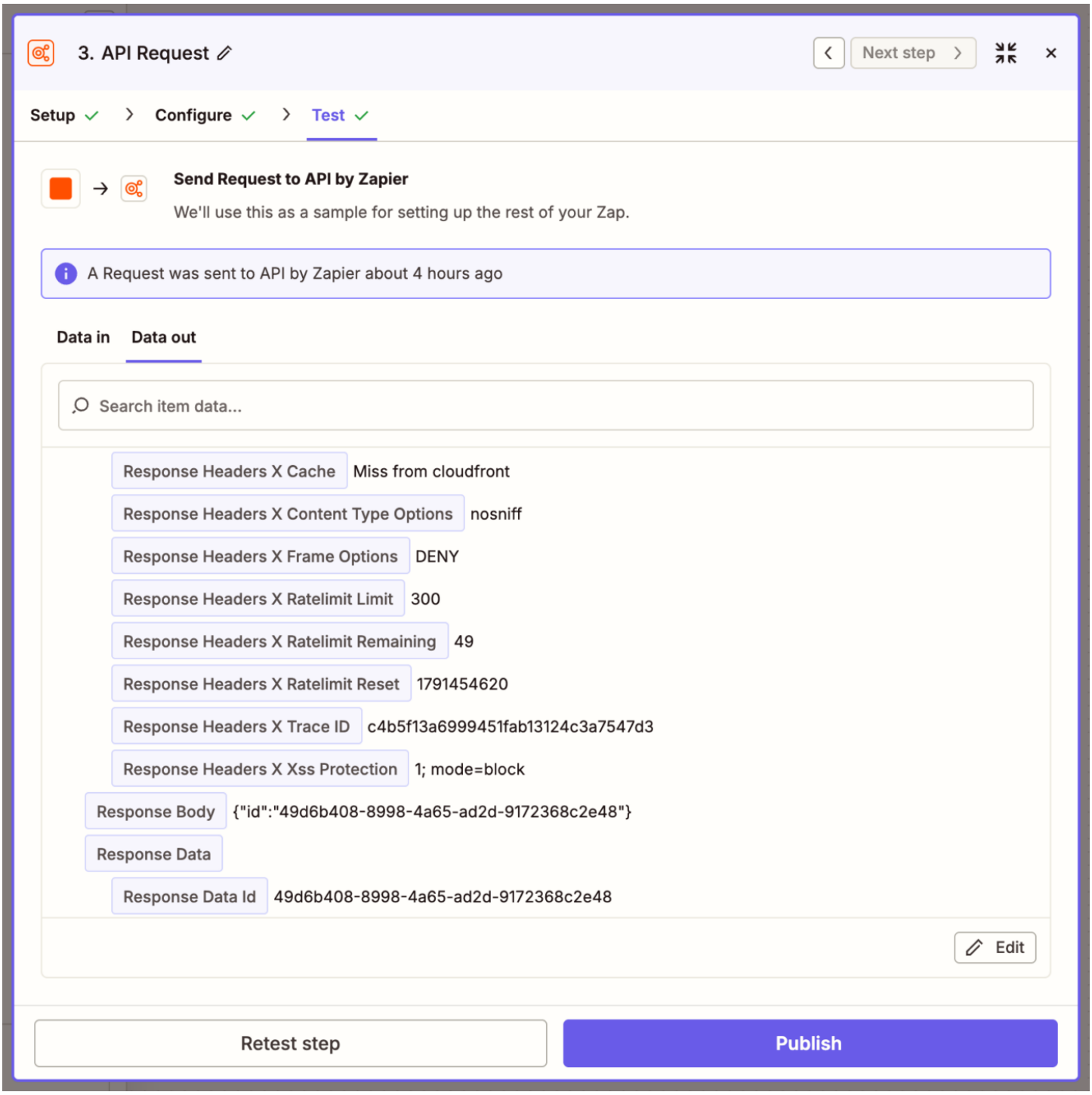
9. Action: add the note

Field	Value
Method	POST
URL	`https://api.atlassian.com/svc/jira/<cloudId>/apps/<appId>_<envId>/v1/contacts/` <Response Data Values ID from step 8> `/notes`

Field	Value
Headers	`Content-Type` = `application/json`
Body	`{"content": "Mailchimp email sent. Subject: <subject from the trigger>"}`

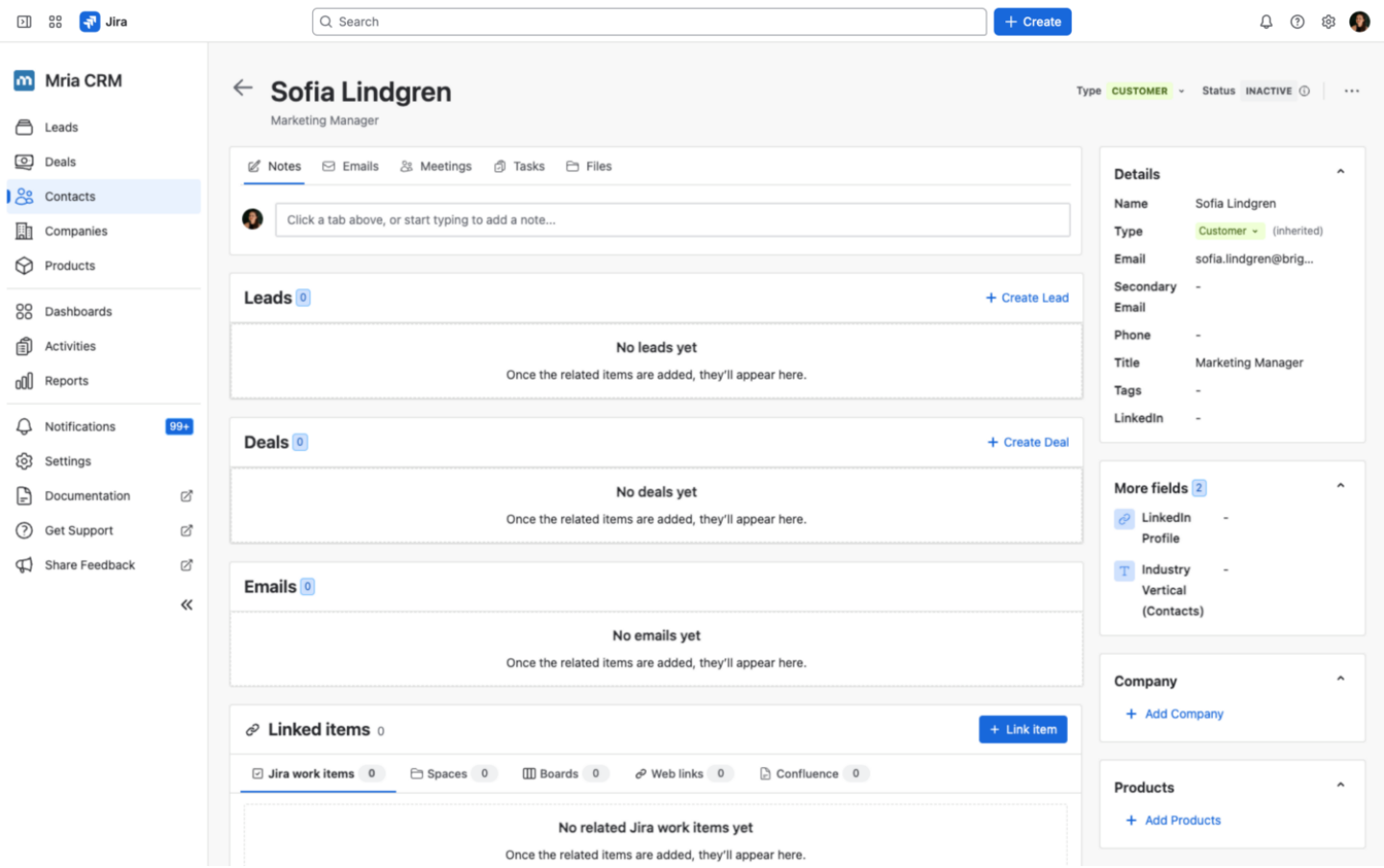
A successful test answers `201` with the id of the new note.

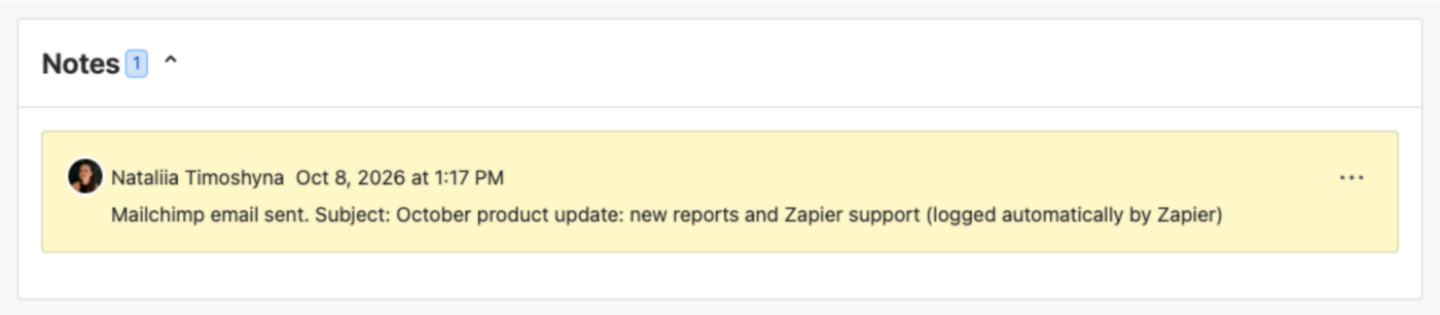




10. The result in Mria CRM

The note appears on the contact, authored by the user who connected the account, and the contact's timeline records it. Publish the Zap once the tests pass.





Other endpoints and limits

- Any endpoint in the OpenAPI spec works the same way: one *API Request* action per call, JSON body, `Content-Type: application/json` on writes.
- Writes need `write:crm:custom`, an active license and a CRM role that allows the edit; a read-only user gets `403` on the note step.
- Notes take up to 10 000 characters of plain text.
- Each API Request action counts as one Zapier task.

- If you cannot use API by Zapier, the same OAuth values work in a private integration built on the Zapier Developer Platform (Platform UI → Authentication → OAuth v2).

This API is supported and actively developed, so it can change without notice. It builds on Atlassian's Forge App REST APIs (Preview). Send feedback to the Mria CRM team.