



Using Mail Chimp with IQX

Set up

Create a Mailchimp account, if you do not already have one.

Mailchimp- Create your List or Audience name(s).

IQX - General settings> Email /Telephony - 300 + 310 need to be populated with your mailchimp API key (found in Account, Extras, API keys) and URL.

IQX - Agency Set up> Contact Event Types - create new type with unique ID eg. ID code 'SB' description 'MailChimp Subscription'. Then populate General Settings>Email/Telephony 315 'mailchimp contact event code' with the corresponding ID.

If your Agency wishes to have different Mail Chimp accounts for different divisions then the API key, URL and username should be added to the Division under Maintenance - Agency Setup -Division.

Using

Once set up is complete you will then see a new view on Person & Client contact selector forms - Mailer Selections.

Click on the IMPORT button on the Mailer Selections view and select the List/Audience you have in MailChimp. This will create the link to the list within IQX.

Adding people to the list is similar to creating stored selection. Search & highlight the relevant people. Save.

Clicking on the Members button will show you the list of people added and their Mailer State.



The screenshot shows the IQX software interface. The top window is titled 'Select Person' and contains a search bar, buttons for 'Find', 'New', 'Close', and 'Help', and a list of actions: 'Retrieve', 'Save', 'Delete', 'Re-Assign', 'Members' (highlighted with a red box), 'Import', and 'Subscribe'. Below these is a table with columns: 'Owner', 'Name', 'Subject', 'Created', 'From Name', and 'Reply Email'. The table contains one row: 'BARBARA', 'Excequer test', 'Mailer', '12/02/2014', 'IQX', and 'barbara@iqx.co.uk'. A sidebar on the left lists 'Stored Selections', 'Stored Searches', 'Reports', 'Mail Merge', 'Bulk CV Import', and 'Mailer Selections'. Two dialog boxes are open: 'Save Mailer Selection' with options 'Add To Current' (selected), 'Replace Current', 'Add All', 'Add Only Highlighted', and 'Add All Except Highlighted'; and 'IQX' with the message '2 People have not been added to the list. 1 have not enabled for 'subscribe to marketing' 1 do not have an email addresses'.

The bottom window is titled 'Person Mailer Members - Excequer test' and contains a table with columns: 'Name', 'Mailer State', 'Date Subscribed', 'Status', 'Email', 'Address', 'Town', and 'Postcode'. The table contains two rows:

Name	Mailer State	Date Subscribed	Status	Email	Address	Town	Postcode
Catherine Adu			Current	barbara@iqx.co.uk	742 Kings Road	LONDON	N18 2PM
Folaranmi Yetunde Akin...			Placed	babsykirik_up@hotmail...	5 Colthurst Drive	LONDON	N9 9TU

The lists can be saved into other consultants names (either on creation or using the Reassign button). And added to/replaced as with Stored Selections.

Using the Subscribe button will send the Subscription Request email from Mailchimp and save a contact event into the relevant record.



Select Person

Keyname or Number * Find New Close Help

Retrieve Save Delete Re-Assign Members Import **Subscribe**

Key	Subject	Created	From Name	Reply Email
Mailer		12/02/2014 IQX		barbara@iqx.co.uk

Processing...

Cancel

Mailchimp Import

Mailer Selections

Information

1 Person added to the Mailchimp subscriber list

OK



Contact Event Folaranmi Yetunde Akinyemi

Text

Letter Text

Person	Folaranmi Yetunde Akinyemi
Made By	BARBARA
Date	12/02/2014
Time	11:16
Type	Mailer Subscription request sent
Summary	Mailchimp Subscriber
Outcome	
Callback	
Callback Time	
Priority	5
Created By	BARBARA
Created	12/02/2014 11:16

Home Phone 0208 344 5983

Mobile 07970 637177

E-mail babsykirk_up@hotmail.com

LinkedIn http://uk.linkedin.com/pub/ba

Insert Text Spell Check Duplicate Available To All

Send Text Write Letter Send E-mail Reply

Added to subscriber list Excequer test

They will now appear on your list in Mailchimp for use.

If the Unsubscribe to Marketing button is set on Person or on Company, Contact Details - then they will not be added to a list. If a candidate or contact unsubscribes via Mail Chimp the next time the Subscribe button is pressed in IQX this data will be pulled back and the relevant record in IQX updated to say they are unsubscribed from marketing.

From:
<https://iqxusers.co.uk/iqxhelp/> - **iqx**

Permanent link:
<https://iqxusers.co.uk/iqxhelp/doku.php?id=ug10-10>

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