



# Using Mail Chimp with IQX

## Set up

General settings> Email /Telephony – 300 + 301 need to be populated with your mailchimp API key and URL.

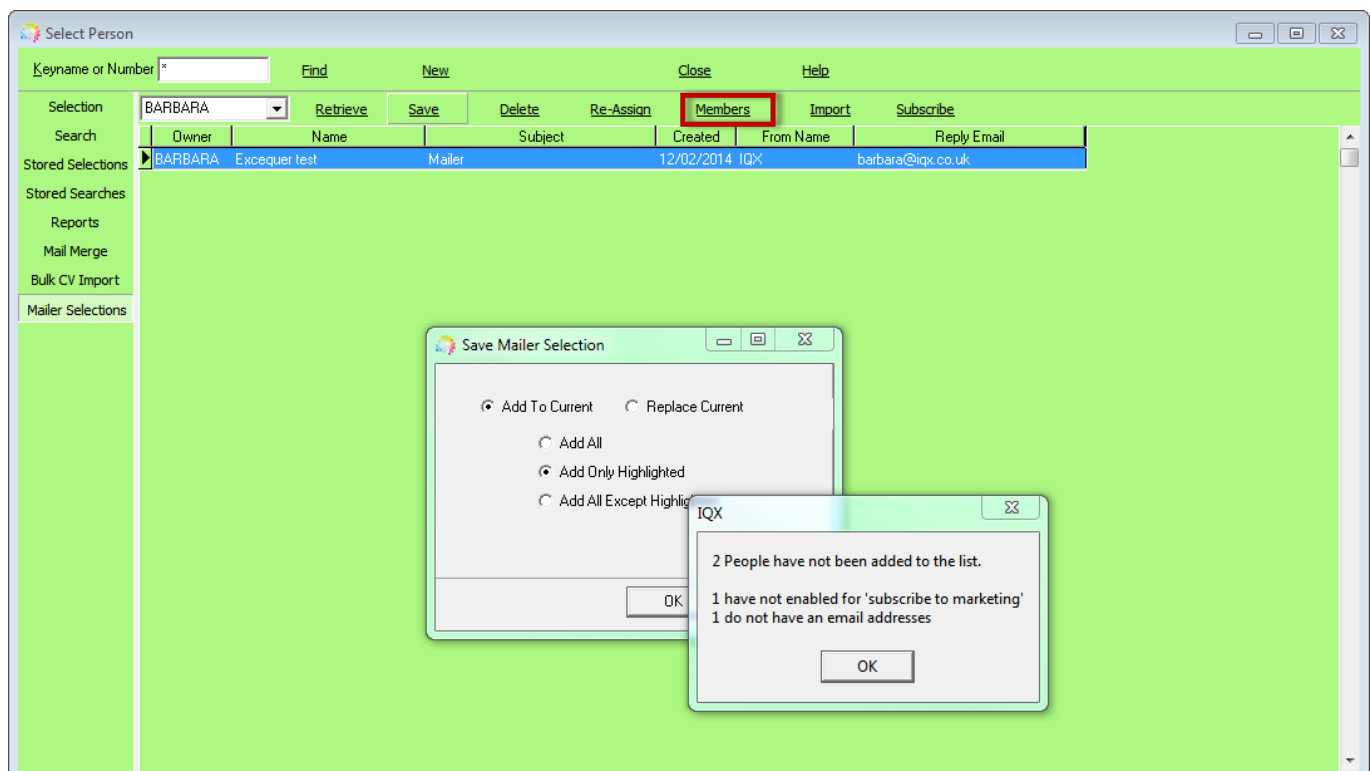
Agency Set up> Contact Event Types – create new type with ID of 'SB'. Called something like 'MailChimp Subscription'. And then populate General Settings>Email/Telephony 315 'mailchimp contact event code' with the corresponding ID.

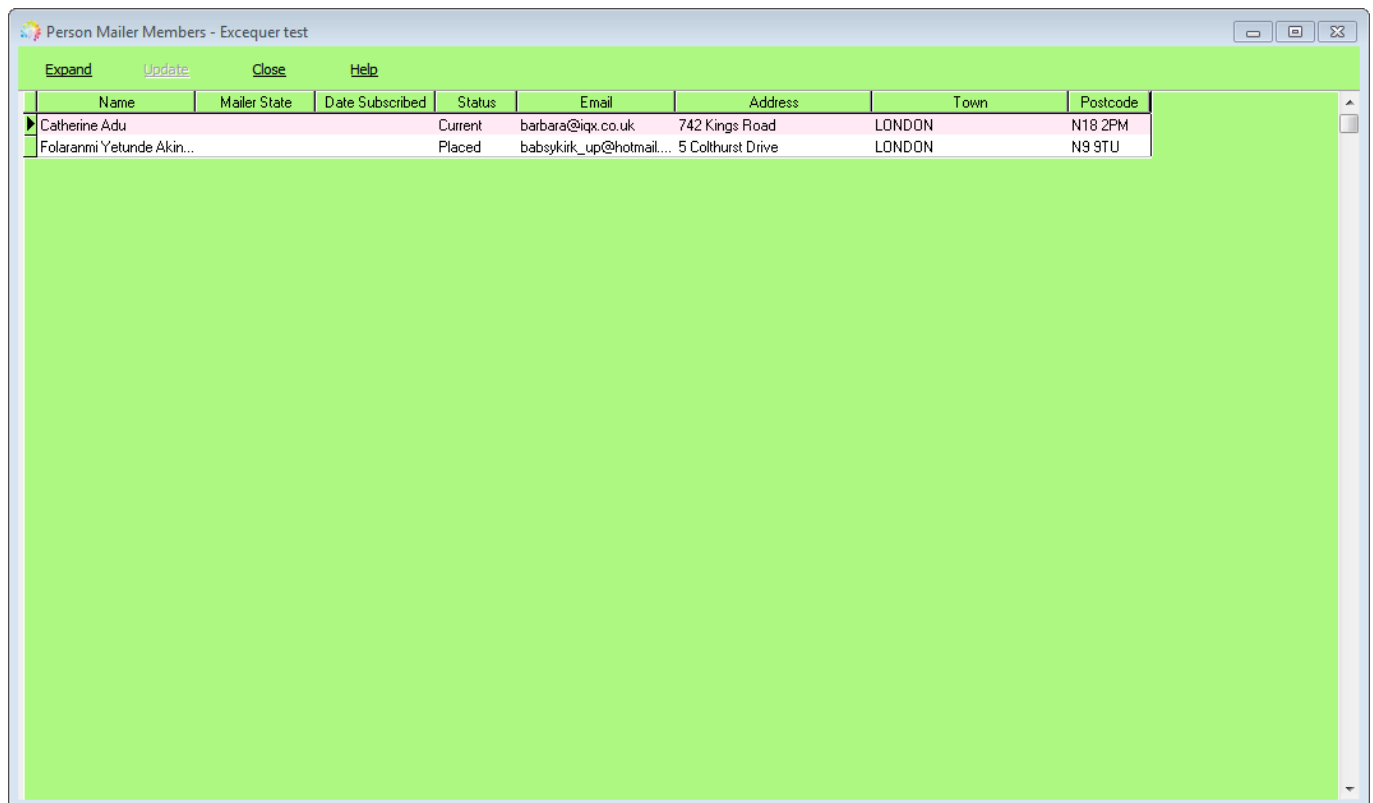
Once set up is complete you will then see a new view on Person & Client contact selector forms – Mailer Selections.

Create your list name in Mailchimp. Then click on the IMPORT button on the Mailer Selections view. This will create 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.





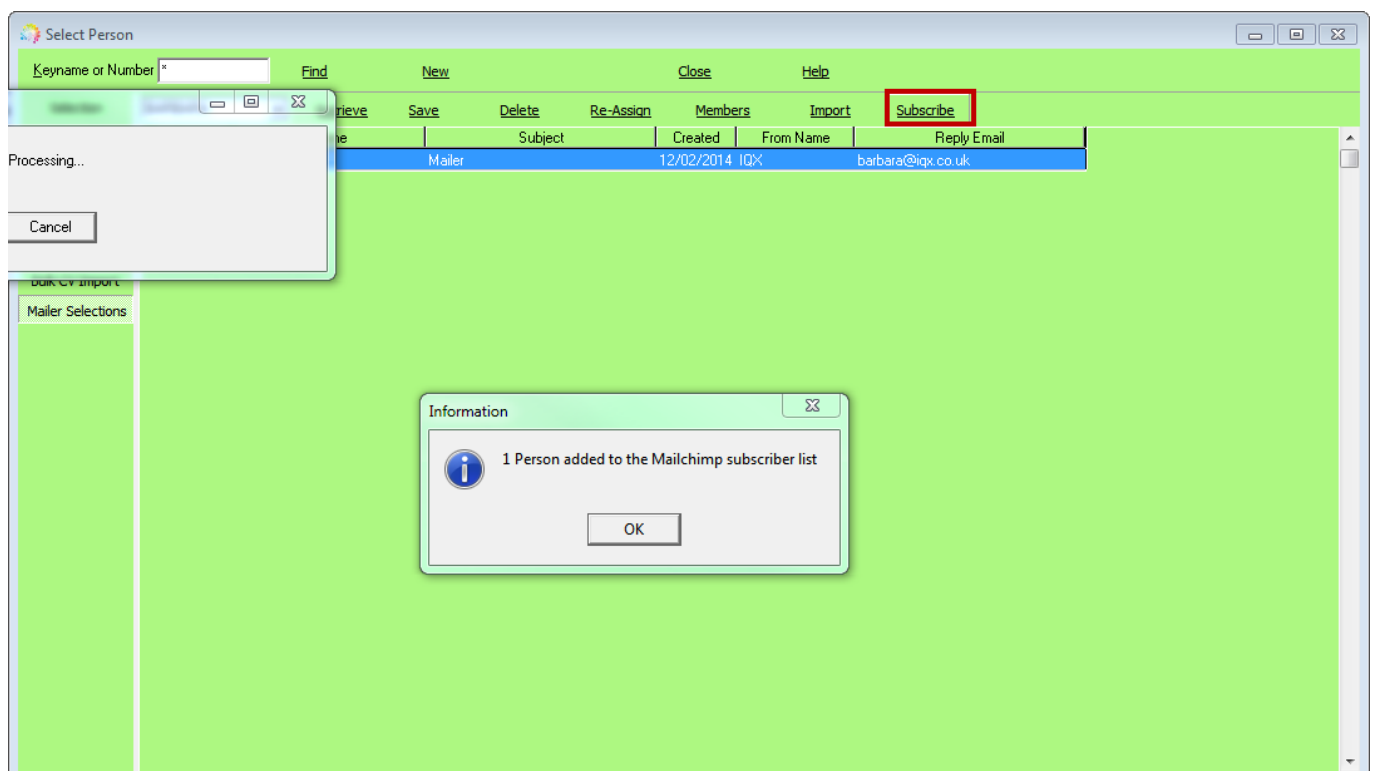
Person Mailer Members - Excequer test

Expand Update Close Help

| 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**

| 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

Made By

Date

Time

Type

Summary

Outcome

Callback

Callback Time

Priority

Created By

Created

Folaranmi Yetunde Akinyemi

BARBARA

12/02/2014

11:16

Mailer Subscription request sent

Mailchimp Subscriber

5

BARBARA

12/02/2014 11:16

Folaranmi Yetu...

Home Phone

Mobile

E-mail

LinkedIn

0208 344 5983

07970 637177

babsykirk\_up@hotmail.com

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



## Excequer test

### Please Confirm Subscription

**Yes, subscribe me to this list.**

If you received this email by mistake, simply delete it. You won't be subscribed if you don't click the confirmation link above.

For questions about this list, please contact:  
[barbara@iqx.co.uk](mailto:barbara@iqx.co.uk)

*MailChimp*

Once they confirm subscription they appear on your list in mailchimp to use for your mailchimp mailers.

Job available to run to unsubscribe people that will send an unsubscribe request to Mailchimp for any with the unsubscribe button pressed on their record.

From:

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

Permanent link:

<https://iqxusers.co.uk/iqxhelp/doku.php?id=ug10-10&rev=1403528393>

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