Using Mail Chimp with IQX

Set up

General settings> Email /Telephony – 300 + 310 need to be populated with your mailchimp API key and URL.

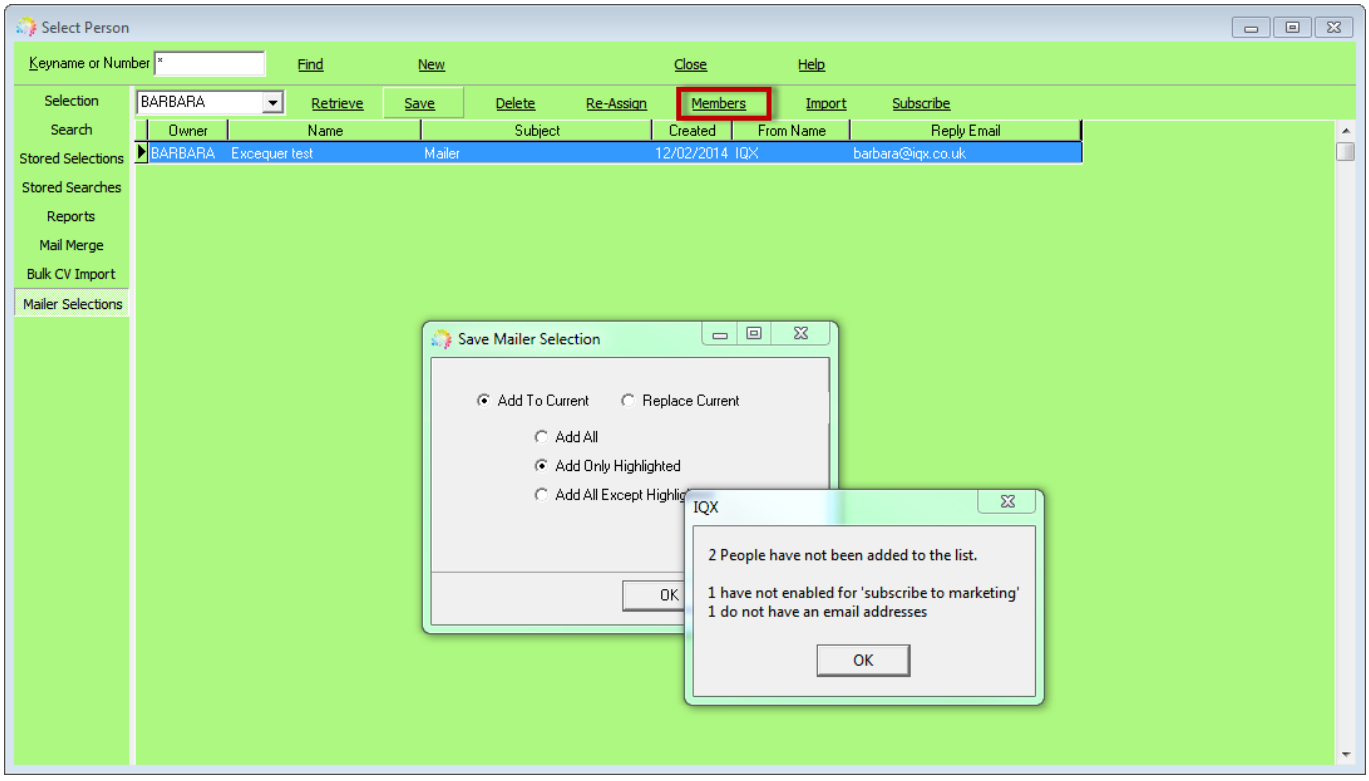
Agency Set up> Contact Event Types – create new type with unique ID eg. ID code 'SB' description 'MailChimp Subscription'. Then populate General Settings>Email/Telephony 315 'mailchimp contact event code' with the corresponding ID.

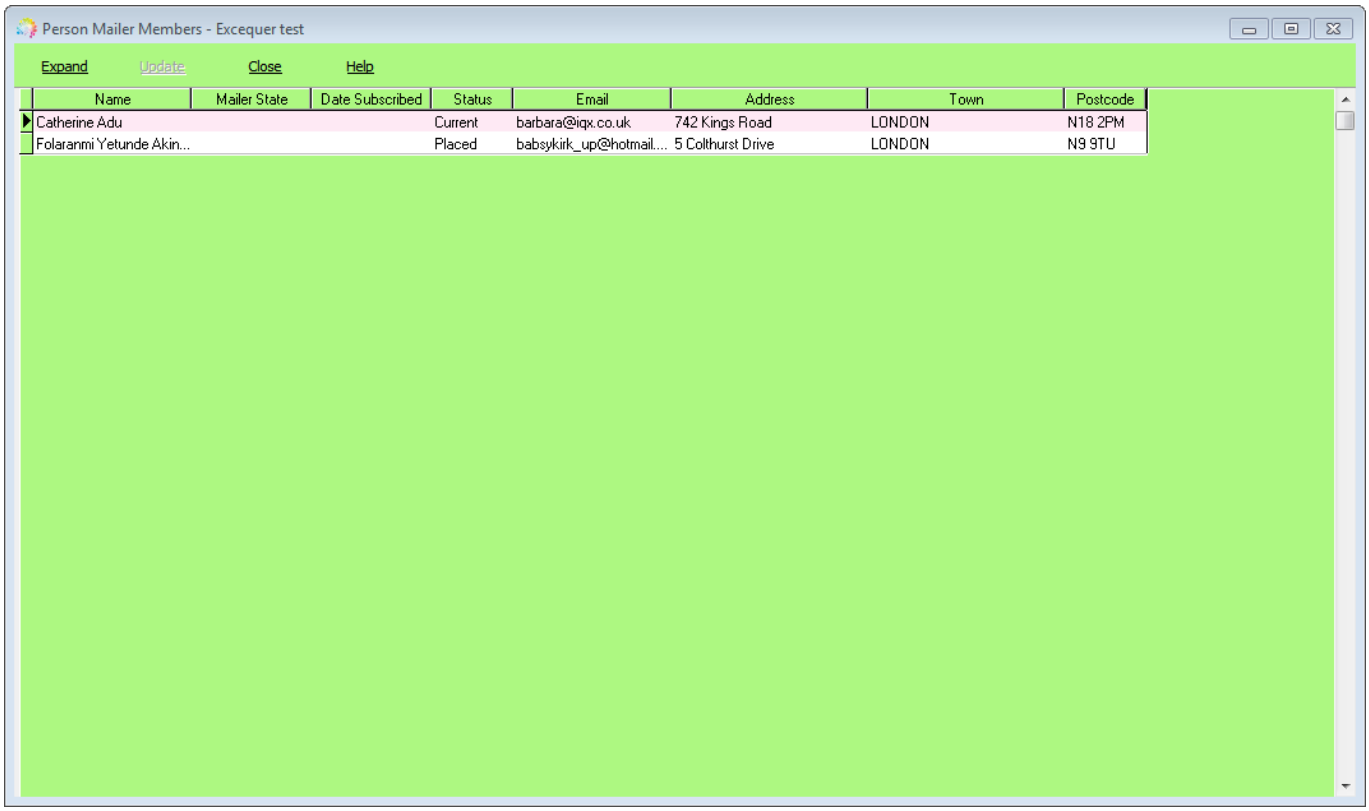
Once set up is complete you will then see a new view on Person & Client contact selector forms – Mailer Selections.

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.

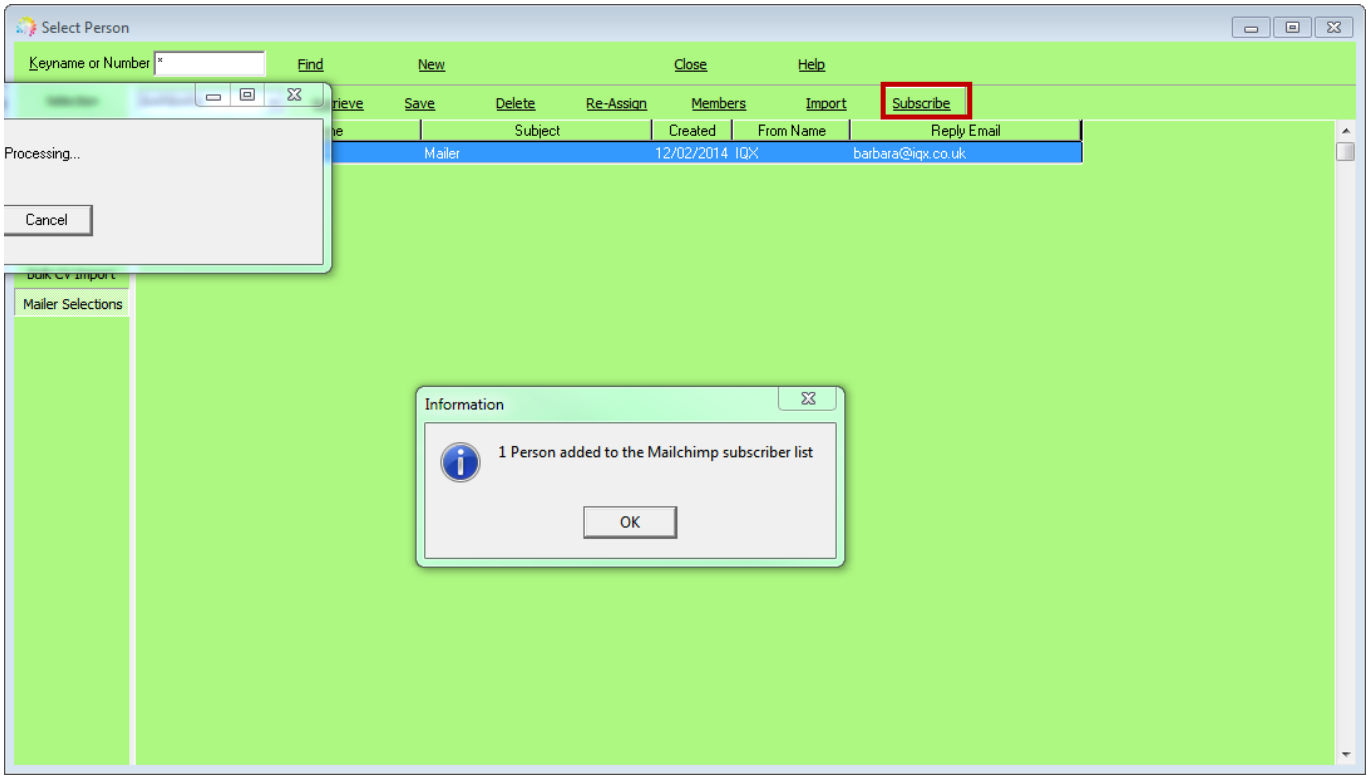
Clicking on the Members button will show you the list of people added and their Mailer State.

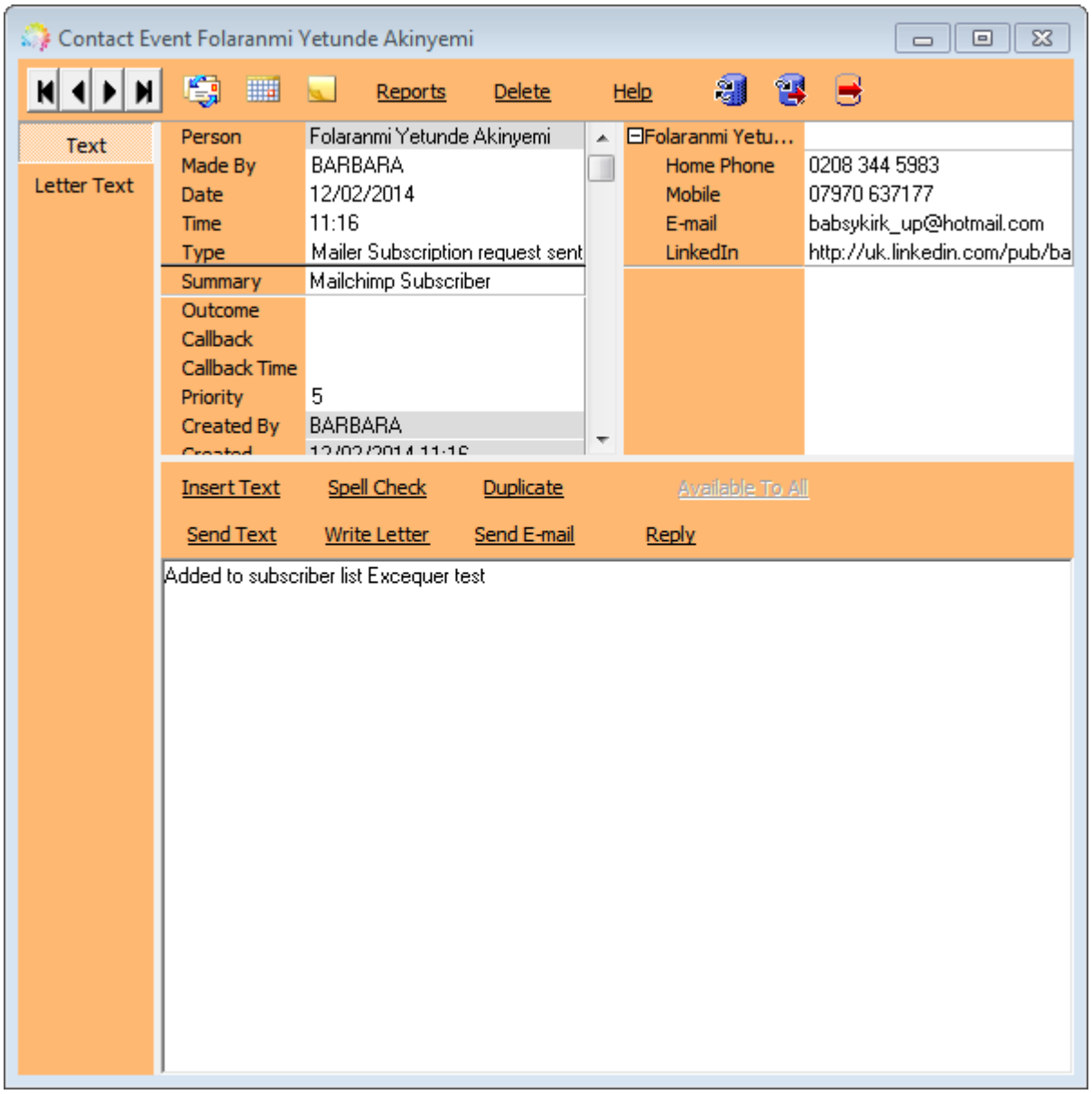


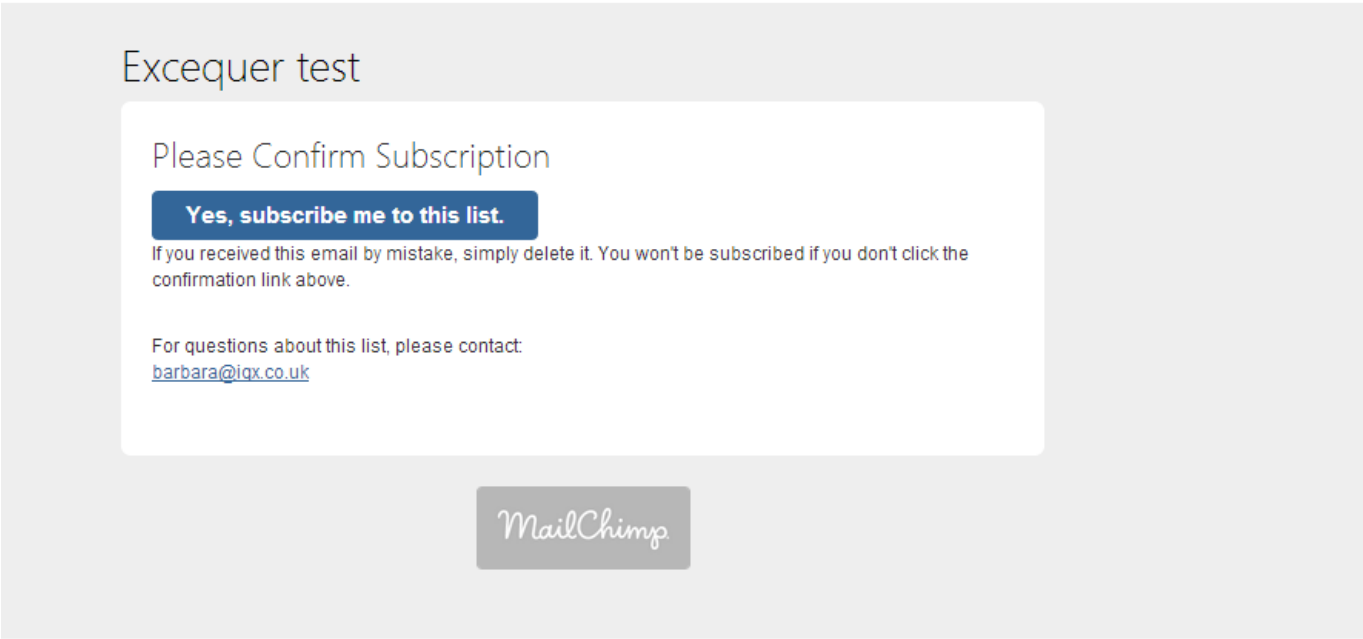


The lists can be saved into other consultants names (either on creation or using the Reassign button). And added to/replaced as with Stored Selections.

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




Contact Event Folaranmi Yetunde Akinyemi
Reports
Delete
Help
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
Folaranmi Yetu...
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



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**

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