Using Mail Chimp with IQX

Set up

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

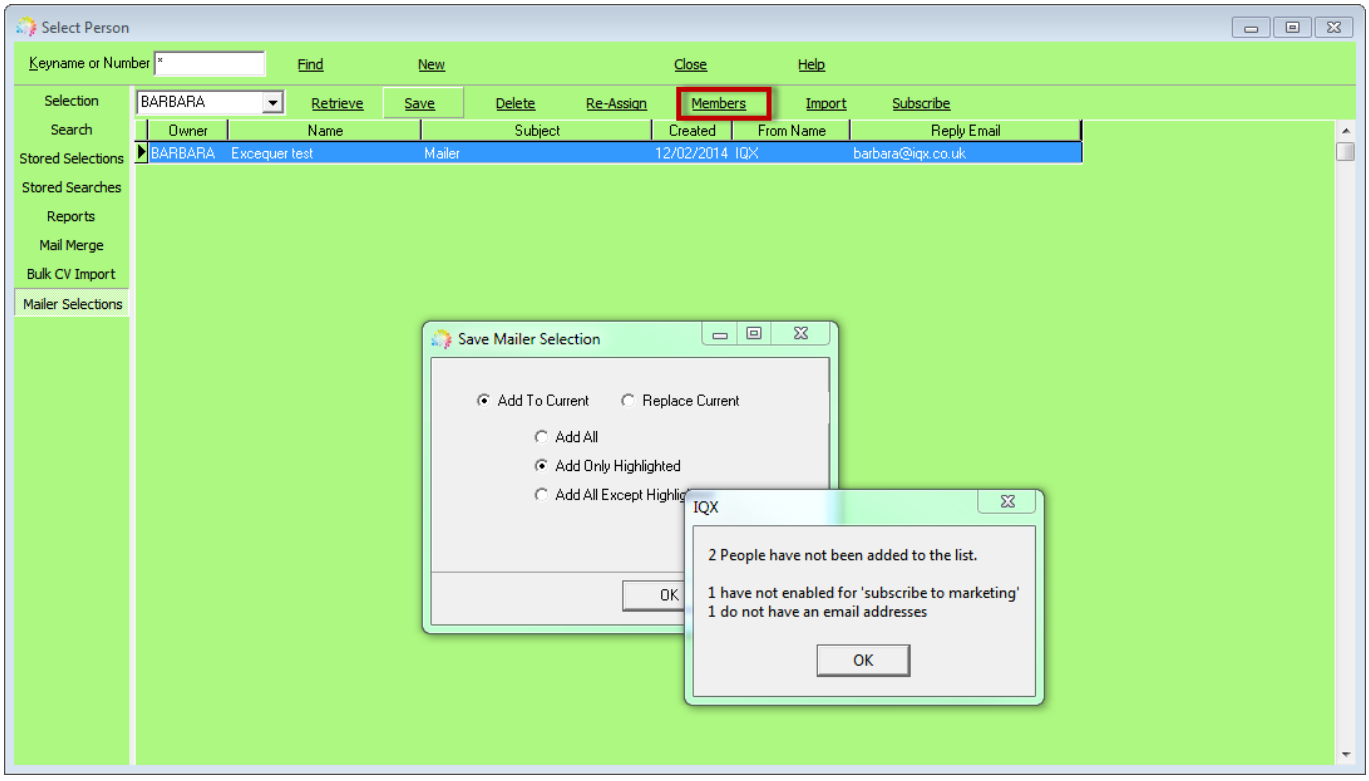
Agency Set up> Contact Event Types – create new type with unique ID eg. ID code 'SB' description 'MailChimp Subscription'. Then populate General Settings>Email/Telephony 315 'mailchimp contact event code' with the corresponding ID.

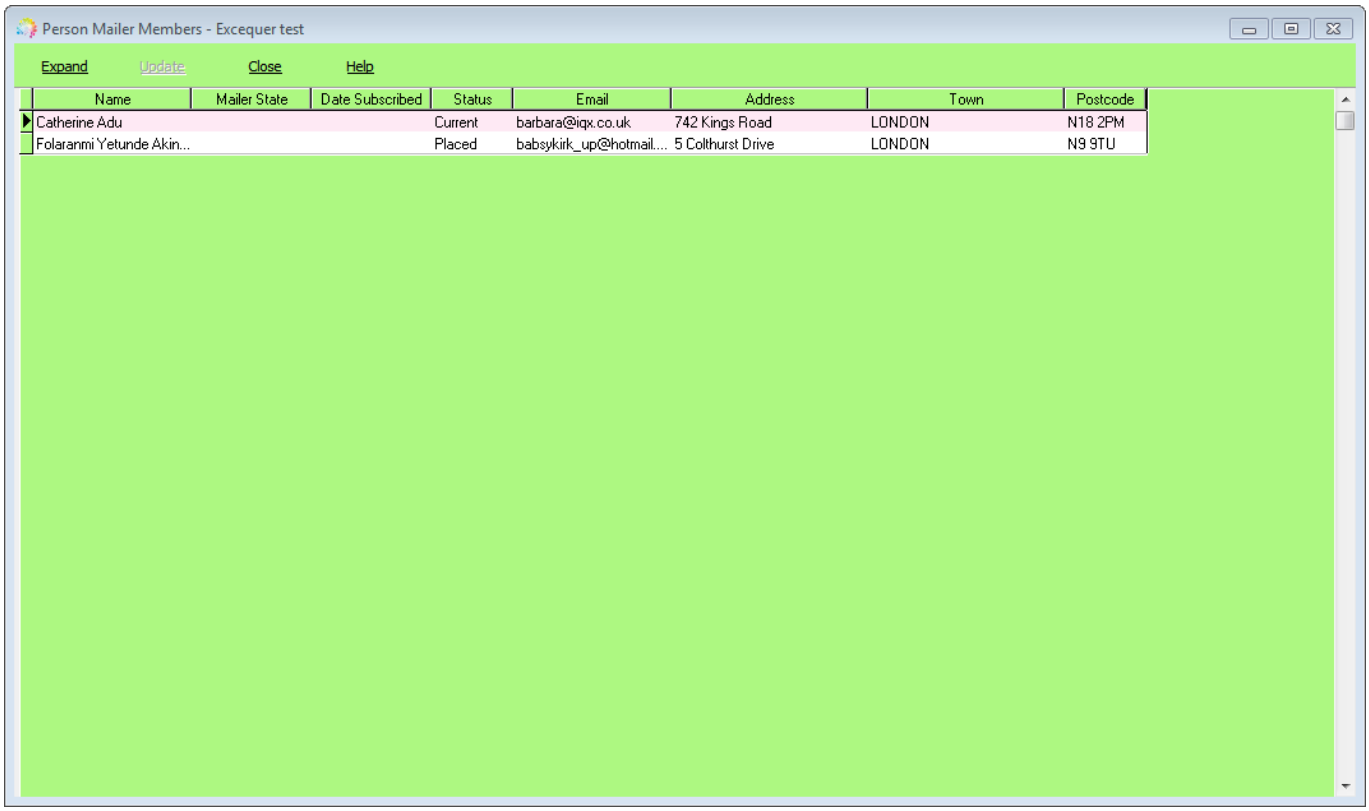
Once set up is complete you will then see a new view on Person & Client contact selector forms – Mailer Selections.

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.

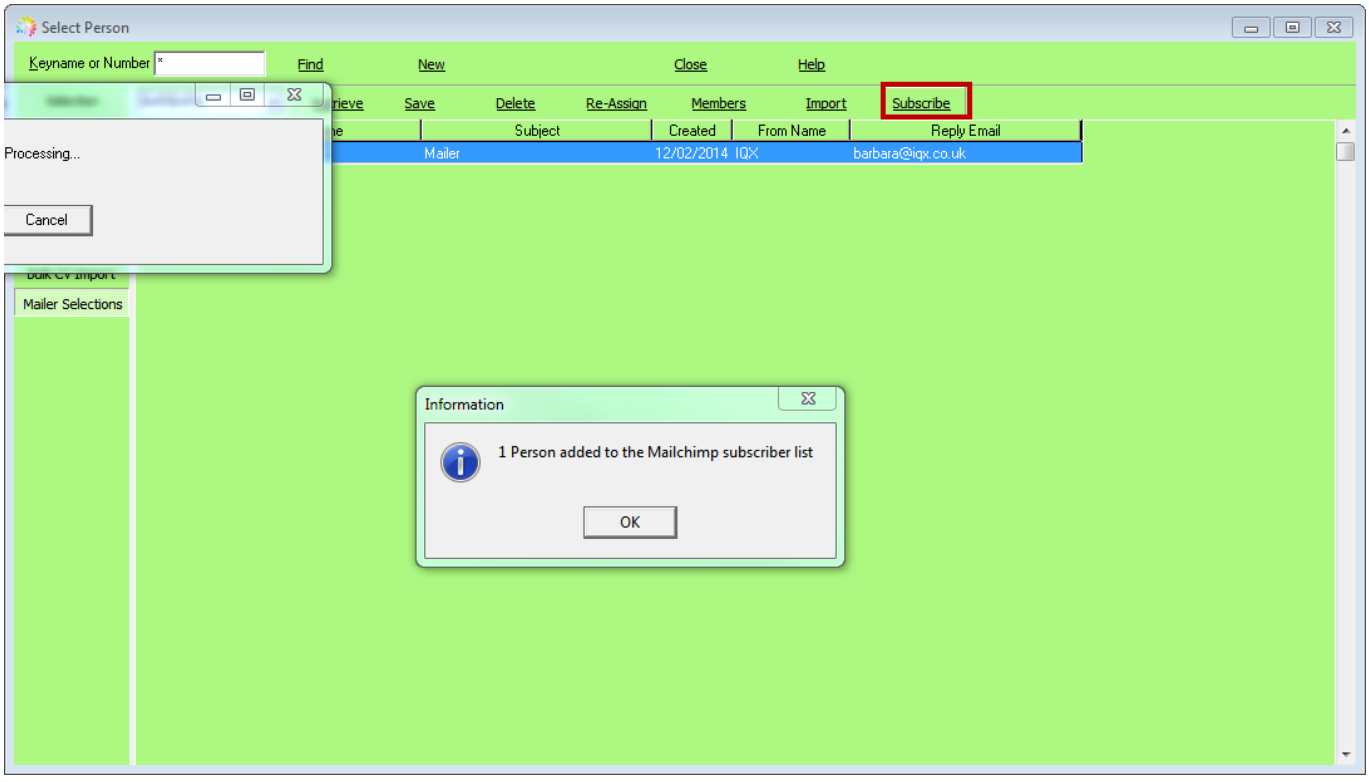
Clicking on the Members button will show you the list of people added and their Mailer State.

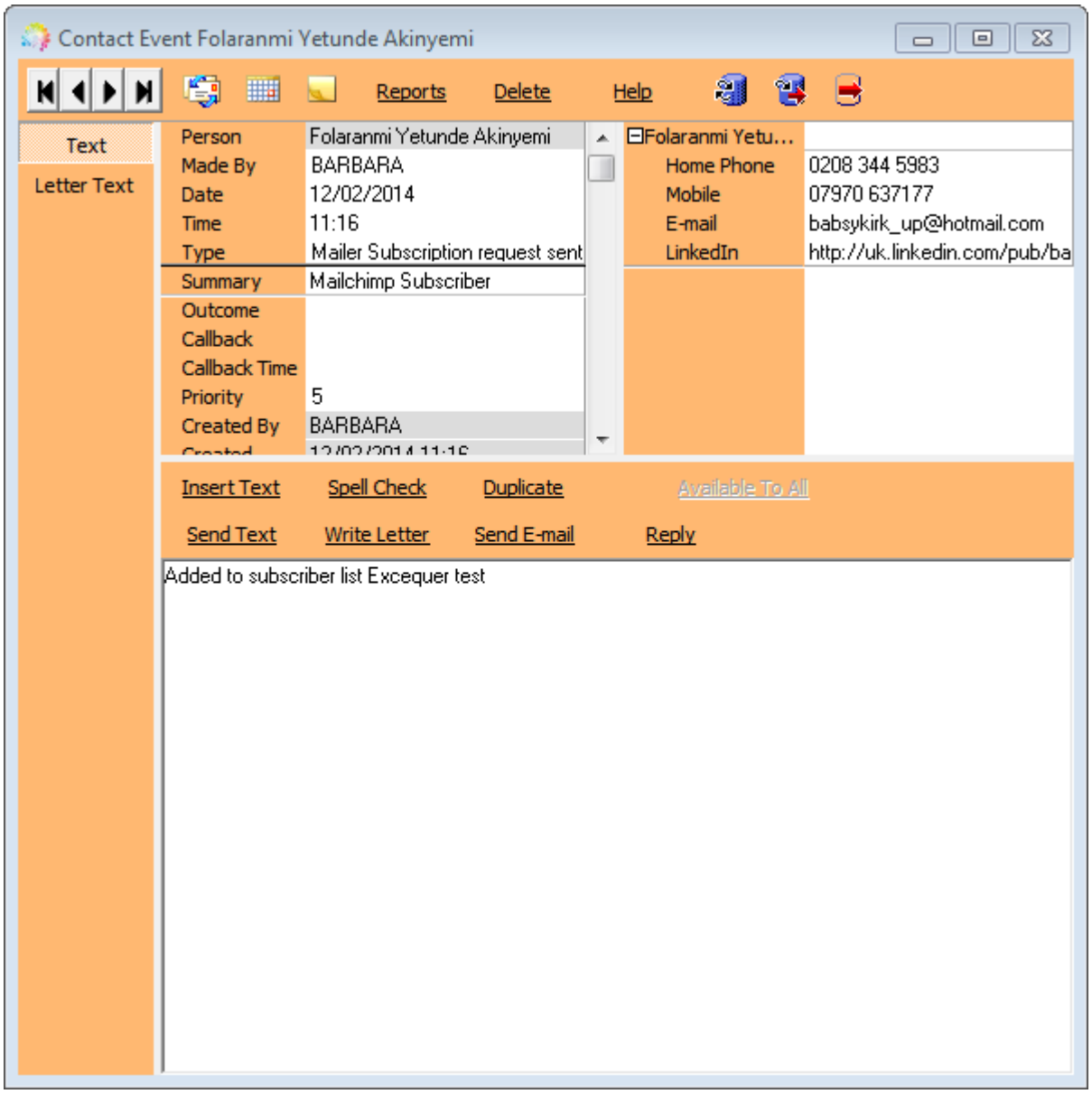




The lists can be saved into other consultants names (either on creation or using the Reassign button). And added to/replaced as with Stored Selections.

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





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

If the Unsubscribe to Marketing button is set - Person, Get in Touch view) or Company, Contact Details - then they will be removed from all lists.

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