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.

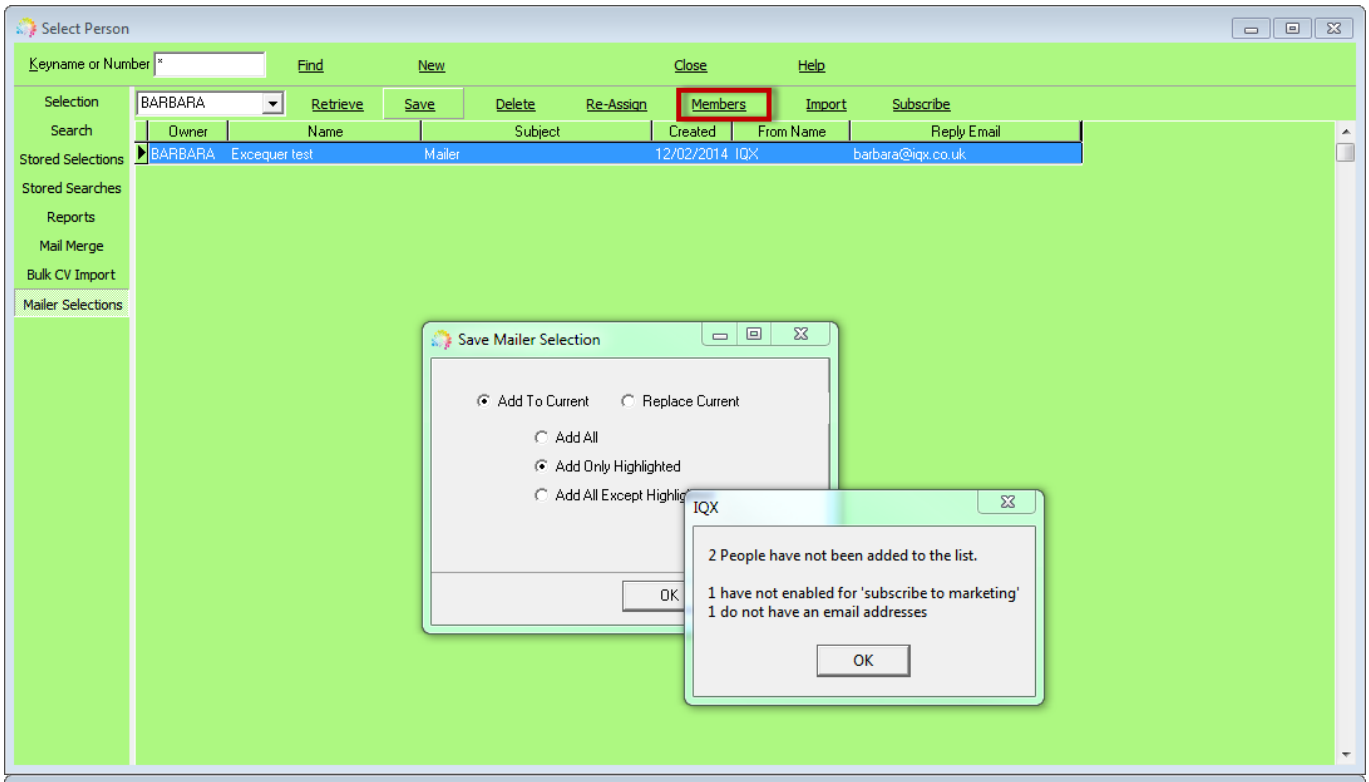
Using

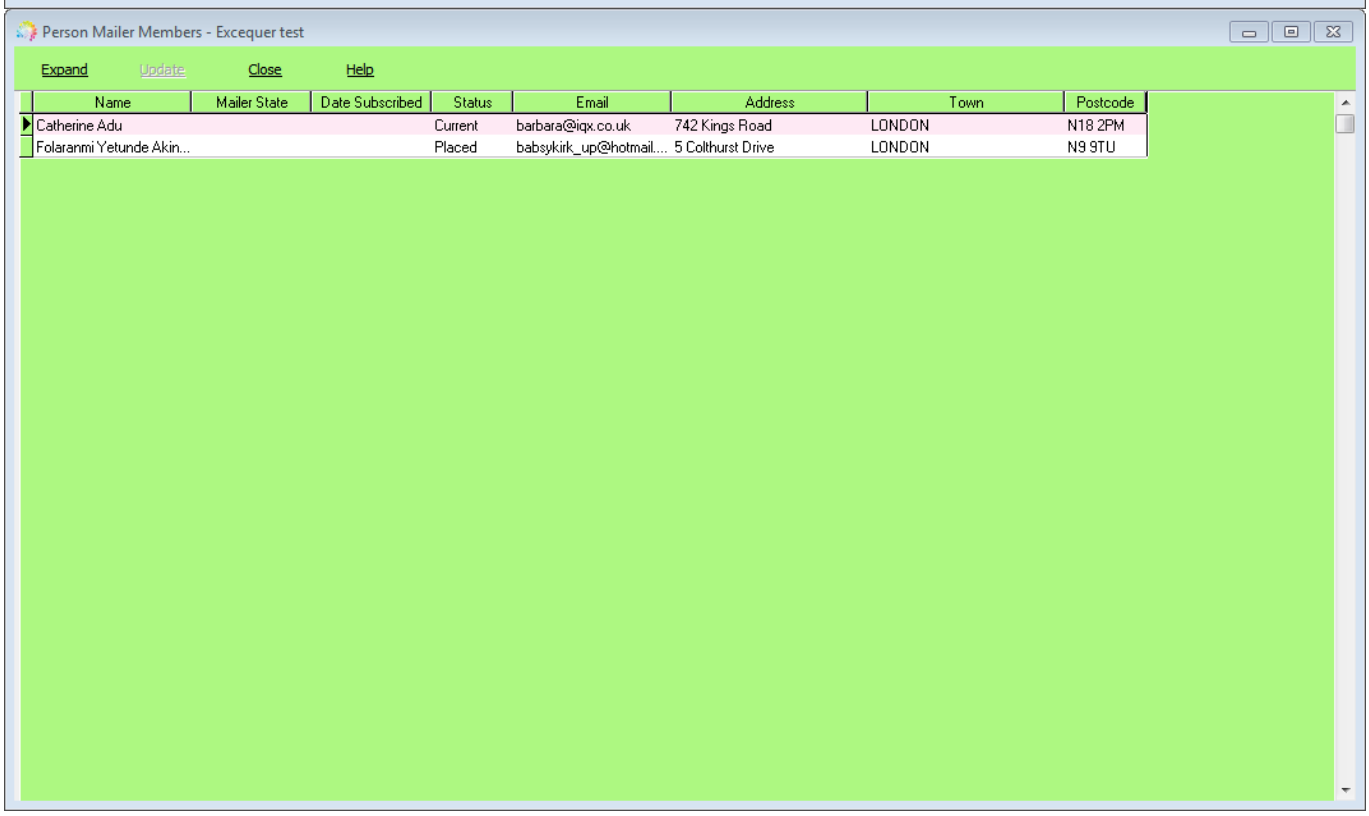
Once set up is complete you will then see a new view on Person & Client contact selector forms – Mailer Selections.

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.

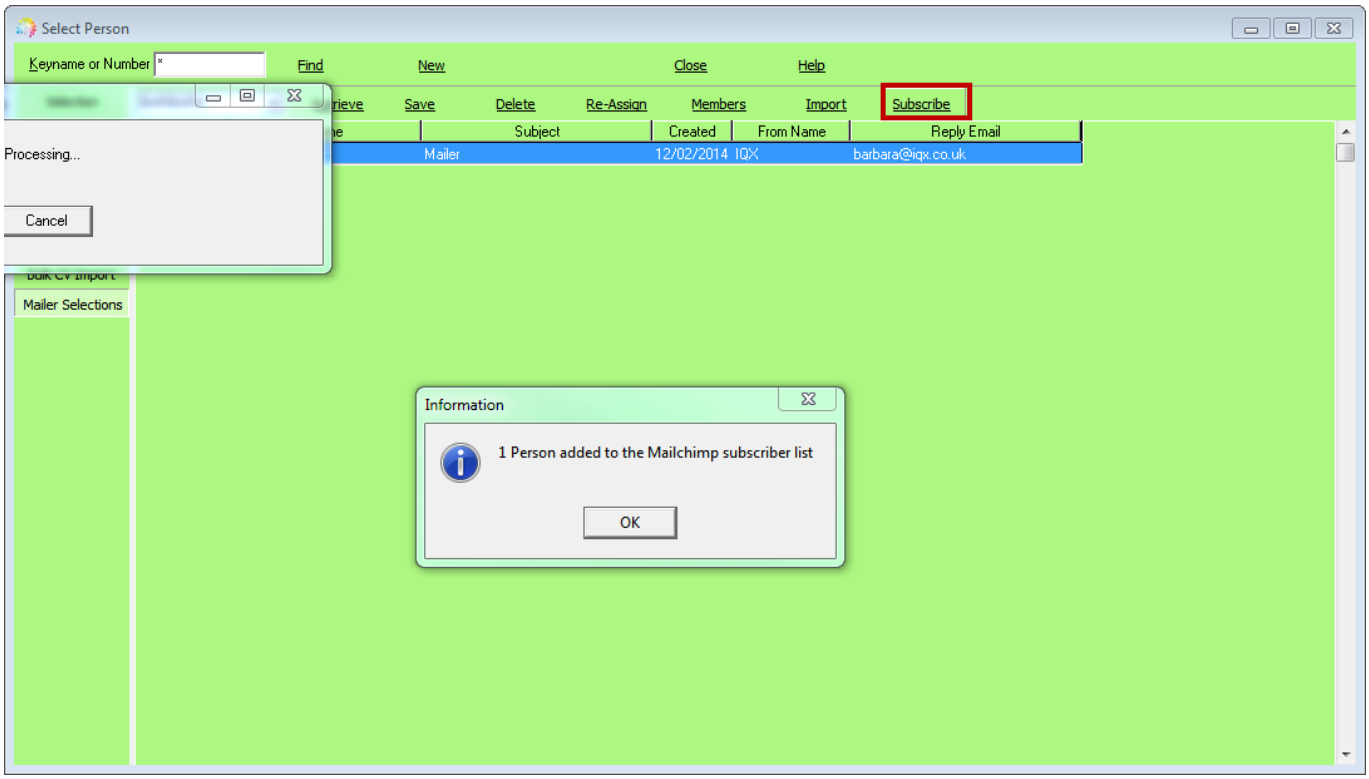
Clicking on the Members button will show you the list of people added and their Mailer State.

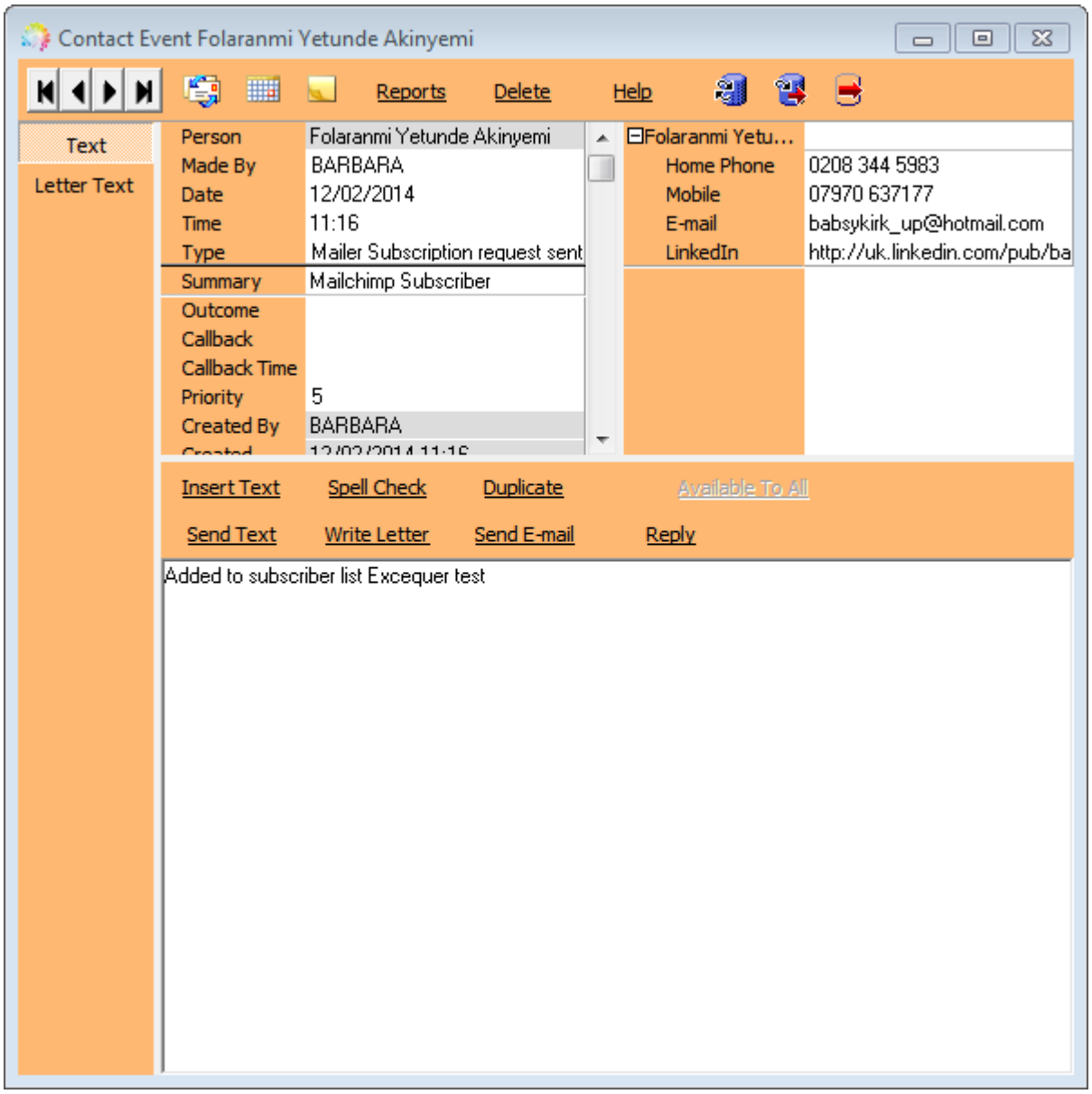




The lists can be saved into other consultants names (either on creation or using the Reassign button). And added to/replaced as with Stored Selections.

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
Save
Delete
Re-Assign
Members
Import
Subscribe
Subject
Created
From Name
Reply Email
Mailer
12/02/2014
IQX
barbara@iqx.co.uk
Processing...
Cancel
Mailer Selections
Information
1 Person added to the Mailchimp subscriber list
OK



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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