



# 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 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 table of stored selections. The 'Members' button is highlighted. Below it, the 'Person Mailer Members - Excequer test' window is open, displaying a table of members. Two dialog boxes are open: 'Save Mailer Selection' and 'IQX'.

**Select Person Window:**

| Selection | Owner         | Name   | Subject | Created    | From Name | Reply Email       |
|-----------|---------------|--------|---------|------------|-----------|-------------------|
| BARBARA   | Excequer test | Mailer |         | 12/02/2014 | IQX       | barbara@iqx.co.uk |

**Save Mailer Selection Dialog:**

- ☒ Add To Current
- ☐ Replace Current
- ☐ Add All
- ☒ Add Only Highlighted
- ☐ Add All Except Highlighted

**IQX Dialog:**

2 People have not been added to the list.

- 1 have not enabled for 'subscribe to marketing'
- 1 do not have an email addresses

**Person Mailer Members - Excequer test Window:**

| 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



| Text        | Person        | Folaranmi Yetunde Akinyemi       |
|-------------|---------------|----------------------------------|
| Letter Text | 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                 |

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 - Person, Get in Touch view) or Company, Contact Details  
- then they will be removed from all lists.

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

Permanent link:  
<https://iqxusers.co.uk/iqxhelp/doku.php?id=ug10-10&rev=1576605226>

Last update: **2019/12/17 17:53**

