



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 this, the 'Person Mailer Members - Excequer test' window is open, displaying a table of members. Two dialog boxes are overlaid on the main windows: '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

Information

1 Person added to the Mailchimp subscriber list

OK



Contact Event Folaranmi Yetunde Akinyemi

Navigation: [Back] [Forward] [Home] [Calendar] [Reports] [Delete] [Help]

Text	Person	Folaranmi Yetunde Akinyemi	☐ Folaranmi Yetu...	
Letter Text	Made By	BARBARA	Home Phone	0208 344 5983
	Date	12/02/2014	Mobile	07970 637177
	Time	11:16	E-mail	babsykir_up@hotmail.com
	Type	Mailer Subscription request sent	LinkedIn	http://uk.linkedin.com/pub/ba
	Summary	Mailchimp Subscriber		
	Outcome			
	Callback			
	Callback Time			
	Priority	5		
	Created By	BARBARA		
Created	12/02/2014 11:16			

Actions: 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 on Person or on 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=1589204330>

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