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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.

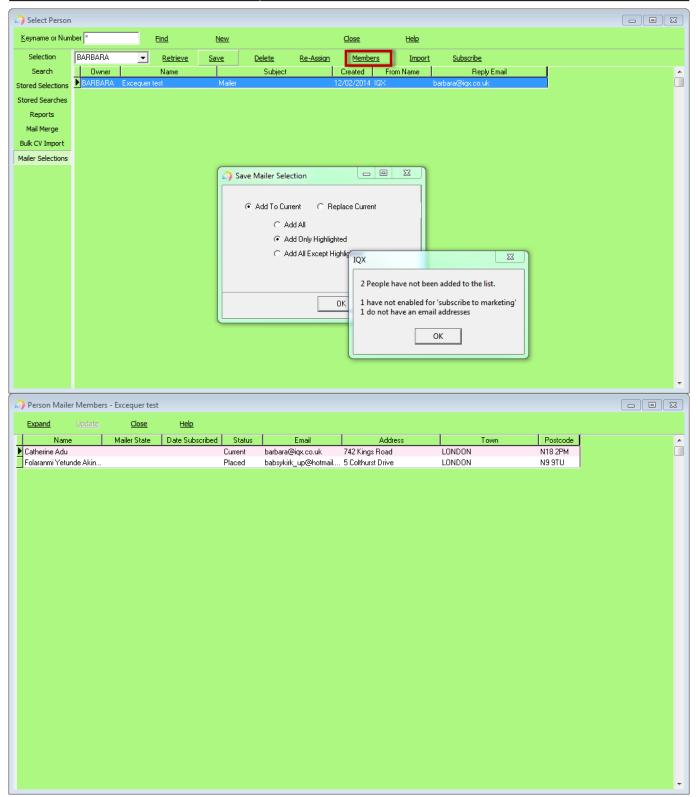
Click on the IMPORT button on the Mailer Selections view and select the List/Audience you have in MailChimp. This will create the link to the list within IQX.

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.



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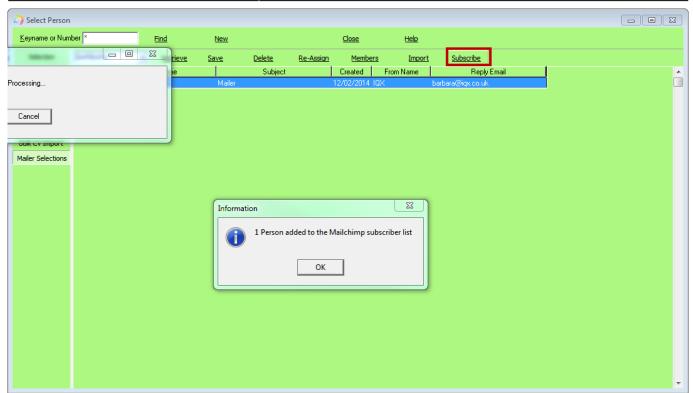


The lists can be saved into other consultants names (either on creation or using the Reassign button). And added to/replaced as with Stored Selections.

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

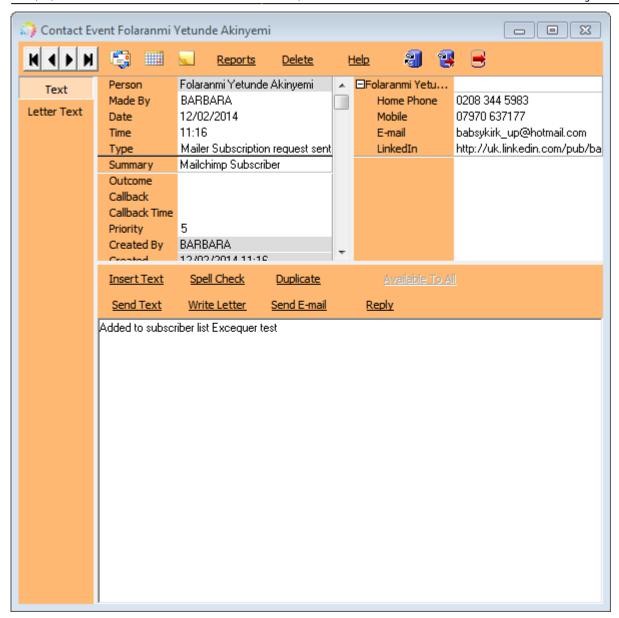


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They will now appear on your list in Mailchimp for use.

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

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