



# 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:**

- Search: BARBARA
- Buttons: Retrieve, Save, Delete, Re-Assign, Members (highlighted), Import, Subscribe
- Table:

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



Contact Event Folaranmi Yetunde Akinyemi

Text Letter Text

Person	Folaranmi Yetunde Akinyemi	<input type="checkbox"/> Folaranmi Yetu...
Made By	BARBARA	Home Phone 0208 344 5983
Date	12/02/2014	Mobile 07970 637177
Time	11:16	E-mail babsykirk_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	

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>

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