

Email Marketing with an iMIS integrated MailChimp

Presented by:
Association Technology Solutions

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- 2015 & 2016 Authorized iMIS Solution Provider (AiSP) of the Year



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Moderator:

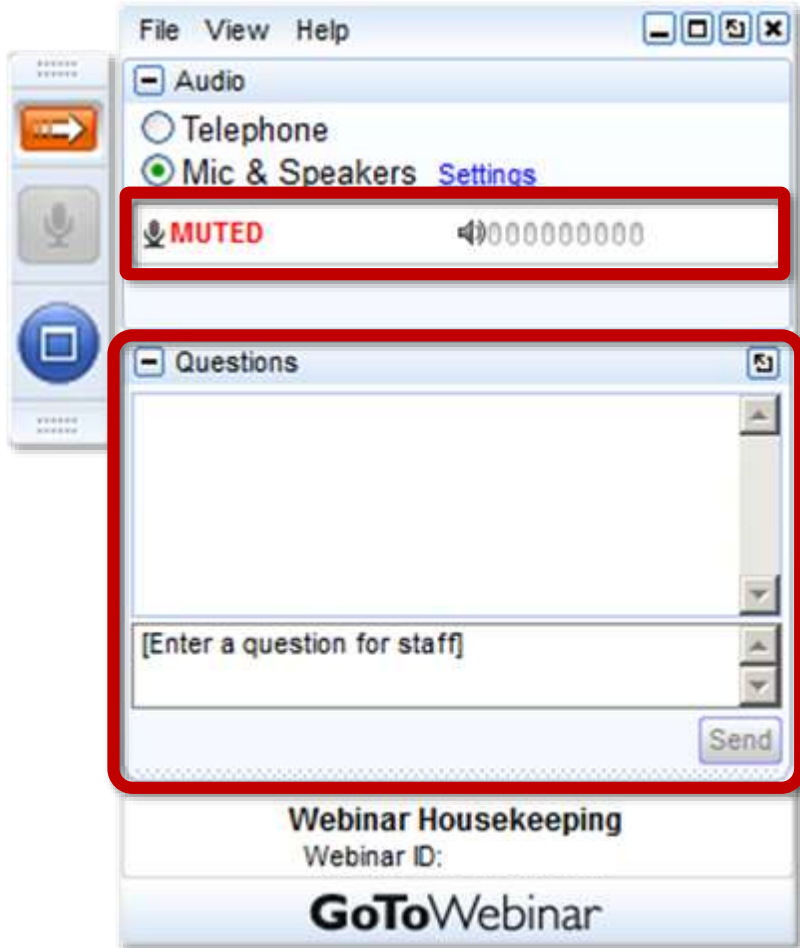
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- Attendees are muted to reduce background noise
- Remember to ask questions via the **Questions** panel
- Questions will be answered during Q&A after presentation is complete



AGENDA

- MailChimp List Setup
- iMIS IQA
- iMIS ~ MailChimp list setup
- Synchronization
- Verifying





MAILCHIMP LIST SETUP

List name and campaign defaults

List name

CCCU Sponsor List - Sync IMIS

List ID

Some plugins and integrations may request your List ID.

Typically, this is what they want: `63783594e1`.

Want to change your signup form title?

The signup forms and confirmation emails for your list use the original list name as a title. You can update this text (or replace it with an image) in the [signup form editor](#).

page.

Field label and type	Required?	Visible?	Put this tag in your content:
<input type="text" value="Email Address"/> email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	* EMAIL * or * MERGE0 *
<input type="text" value="First Name"/> text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	* <input type="text" value="FNAME"/> * or * MERGE1 *
<input type="text" value="Last Name"/> text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	* <input type="text" value="LNAME"/> * or * MERGE2 *
<input type="text" value="ID"/> address	<input type="checkbox"/>	<input type="checkbox"/>	* <input type="text" value="IMISID"/> * or * MERGE3 *
<input type="text" value="COMPANY"/> phone	<input type="checkbox"/>	<input type="checkbox"/>	* <input type="text" value="COMPANY"/> * or * MERGE4 *
Phone format			
<input type="text" value="International"/>			
<input type="text" value="COMP_ID"/> text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	* <input type="text" value="COID"/> * or * MERGE5 *





IMIS IQA

[summary](#) [sources](#) [filters](#) **[display](#)** [sorting](#)

Query Display Columns

Only display unique results View selected columns ▾

Selected [Refresh](#)

Display	Property	Function	Alias	Link	Subtotal	Order
<input checked="" type="checkbox"/>	Id	None ▾	ID		<input type="checkbox"/>	1 ▾
<input checked="" type="checkbox"/>	contact_L Name	None ▾	LNAME		<input type="checkbox"/>	2 ▾
<input checked="" type="checkbox"/>	contact_F Name	None ▾	FNAME		<input type="checkbox"/>	3 ▾
<input checked="" type="checkbox"/>	contact_email	None ▾	EMAIL		<input type="checkbox"/>	4 ▾
<input checked="" type="checkbox"/>	company	None ▾	COMPANY		<input type="checkbox"/>	5 ▾





IMIS – MAILCHIMP LIST SETUP

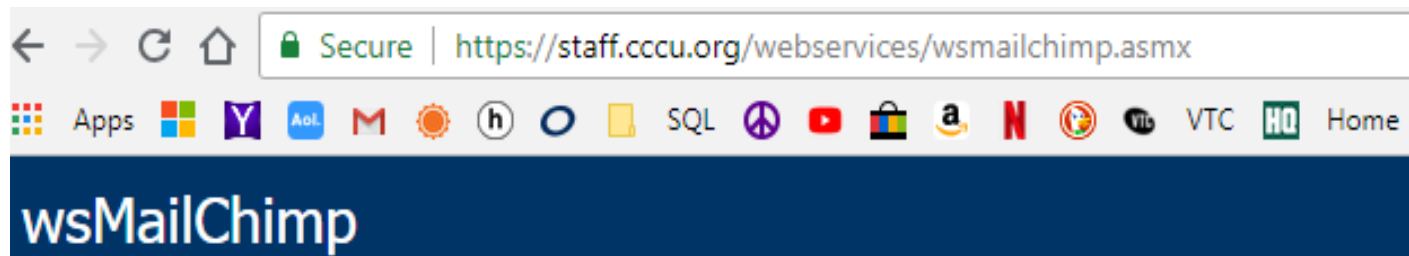
General lookup/validation

New	Open	Edit	Delete
-----	------	------	--------

MAILCHIMP_LISTS	
116340b84a	(\$/CCCU/IQA/MC_COT_I
2afba812ba	(\$/CCCU/IQA/MC_FORUM
32b3bfab25	(\$/CCCU/IQA/MC_Mult
63783594e1	
9082e33c6d	(\$/CCCU/IQA/MC_Pres
96900b9490	(\$/CCCU/IQA/MC_SNEZI
b84a9ceb27	(\$/CCCU/IQA/MC_Mult
fc7be10972	(\$/CCCU/IQA/MC_Forur

Code	63783594e1
Expansion	
Description	\$/CCCU/IQA/MC_Sponsor_Complete_List





The following operations are supported. For a formal definition, please review the [Service Description](#).

- [getBatchStatus](#)
Get Status of Batches. OnlyShowFailed can be TRUE or FALSE If true will only show batches with
- [pushContactsToMailChimp](#)
Pushes contacts to MailChimp
- [retrieveActivityFromMailChimp](#)
Retrieves activity from MailChimp

wsMailChimp

Click [here](#) for a complete list of operations.

pushContactsToMailChimp

Pushes contacts to MailChimp

Test

To test the operation using the HTTP POST protocol, click the 'Invoke' button.

Invoke

SOAP 1.1

The following is a sample SOAP 1.1 request and response. The placeholders shown need to be replaced with actual values.

```
POST /webservices/wsmailchimp.asmx HTTP/1.1
Host: staff.cccu.org
Content-Type: text/xml; charset=utf-8
Content-Length: length
SOAPAction: "http://www.atsol.org/mailchimp/pushContactsToMailChimp"

<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xml:lang="en">
  <soap:Body>
    <pushContactsToMailChimp xmlns="http://www.atsol.org/mailchimp" />
  </soap:Body>
</soap:Envelope>
```



VERIFYING

Search Campaigns and Contacts

Current List ▾ ×

Advanced search keywords





Bob Adamus · badamus@aviands.com
CCCU Sponsor List - Sync iMIS
Subscribed on Jul 18, 2018 2:36 pm






View Profile







Mr. Brian Murphy

iMIS

- Community
- Dashboard
- Find contacts
- Add contact
- Manage duplicates PLUS
- Committees
- Communities
- Volunteers
- Security
- Membership
- Fundraising
- Events
- Commerce
- Marketing
- Certification
- Continuum
- RISE
- Settings

Alex Morgan
Versaton AP
Mobile
(214) 688-5034



Member since 10/1/1994
Member type Regular Member
Status Inactive
Paid through 8/26/2015


[Print Info](#)
[Public Profile](#)
[Email](#)

[Resolve Duplicates](#)

[Donate](#)
[Order](#)
[Register](#)

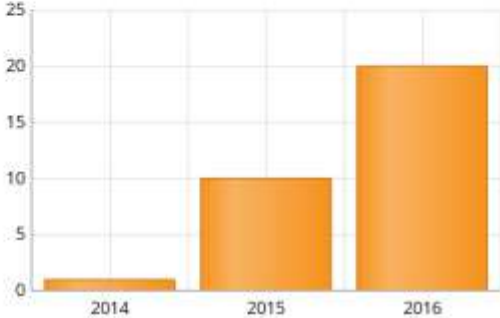
About
Participation
History
Donor data
Preferences

Engagement score



99

Engagement history



Year	Engagement Score
2014	1
2015	10
2016	20

Membership

IMIS ID	23095	Dues Amount	
Member type	Regular Member	Status	Inactive
Billing category	Billing Category 1	Member since	10/1/1994
Chapter	West Chapter	Paid through	8/26/2015
Member status	Dropped	Billed through	8/27/2016
Status changed	8/20/2016	Date added	1/26/2015
Last updated by	BRIANM	Last updated	8/20/2016 9:42 AM
Sponsor		CreditLimit	
Board	No	Advertiser	No

- Push lists to MailChimp
 - Can support any IQA fields from iMIS for merging with your email and filtering
- Record MailChimp activity back in iMIS
 - Successful Sync
 - Sends
 - Bounces
 - Opens
 - Clicks including url and device ip address
 - Unsubscribes
- Runs in batches for performance

- Installed on your iMIS application server
- Works with all versions of iMIS
- Is based on the iMIS API's and is upgradable as iMIS upgrades
- Leverages standard iMIS features such as IQA queries
- Takes planning to decide what groups to use and what information to pass



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Other Questions?

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