DASH

USER GUIDE
MAILCHIMP

April 2024

Prerequisites

Before using the Mailchimp integration with DASH, an existing MailChimp account is required.

If you do not have a MailChimp account, you can sign up for one by visiting: https://login.mailchimp.com/signup
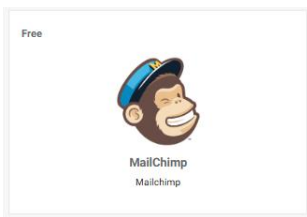
What this integration includes

Importing contacting into Mailchimp to use for emailing, surveying or any other Mailchimp purposes. Contacts within Mailchimp can also be imported back to DASH.
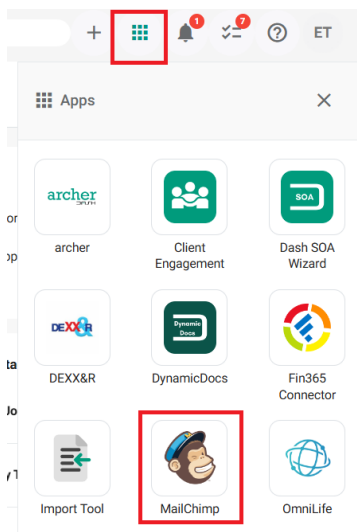
The integration does not include inputting emails/survey data from mailchimp into DASH file notes.
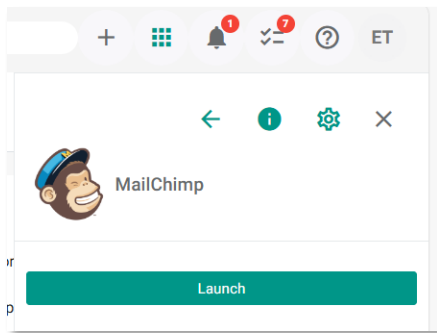
Setting up

1. Visit the Store on the left side menu > Under **Apps**, search and subscribe to the Mailchimp app

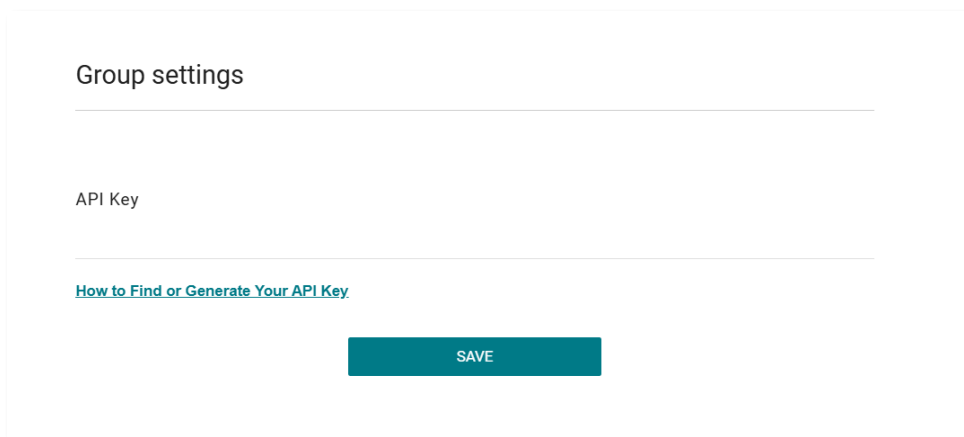2. Once complete, select the **Apps panel** to open the Mailchimp app

3. Select the App Settings denoted by the cog icon

4. Input your Mailchimp API Key, instructions can be found via the link on the screen or via the below link.

For information about finding or generating your API Key please visit: https://mailchimp.com/help/about-api-keys/

Using Mailchimp integration

1. Select the **App Panel** and find the **Mailchimp** app
2. Select **Launch.**
   - Mailchimp will begin populating a list of your contacts. This may take a couple of minutes. - In the event that no contacts are loaded, exit the App by clicking X Close MailChimp on the top right of your screen and relaunch the App.

3. If you are launching MailChimp for the first time, you will be prompted with a message regarding the default audience, click **OK** to continue

   The default audience will be where any contacts you import from DASH will appear under. Additionally, any contacts that you would like to export from MailChimp over to DASH will need to be under the audience stated in the message.

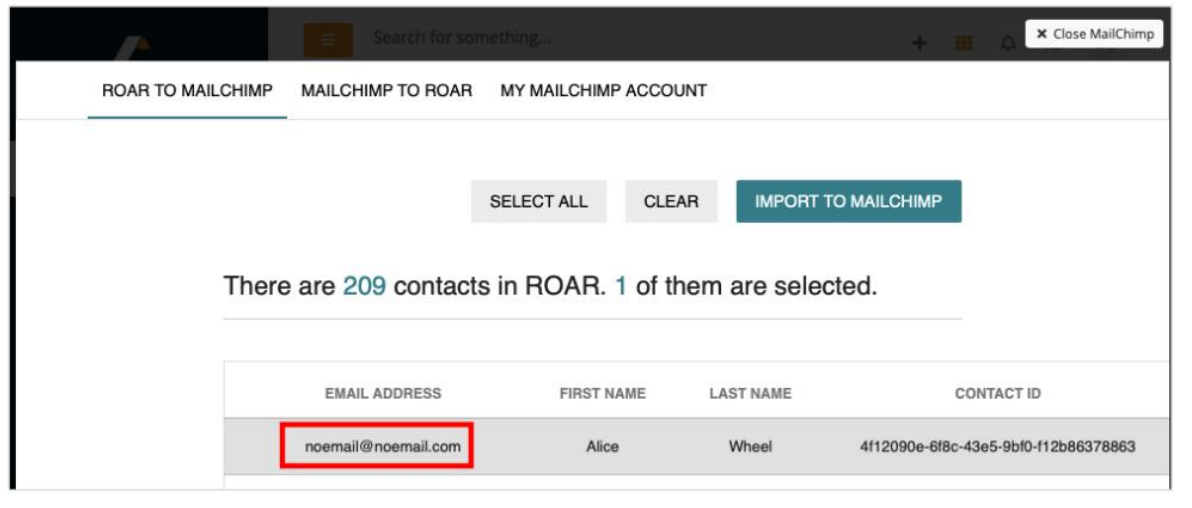   Please remember to note the name of the audience.

Note: Any contacts imported from DASH will appear under that audience in Mailchimp. Should you wish to export a contact from Mailchimp over to DASH, they must be within the default Audience.

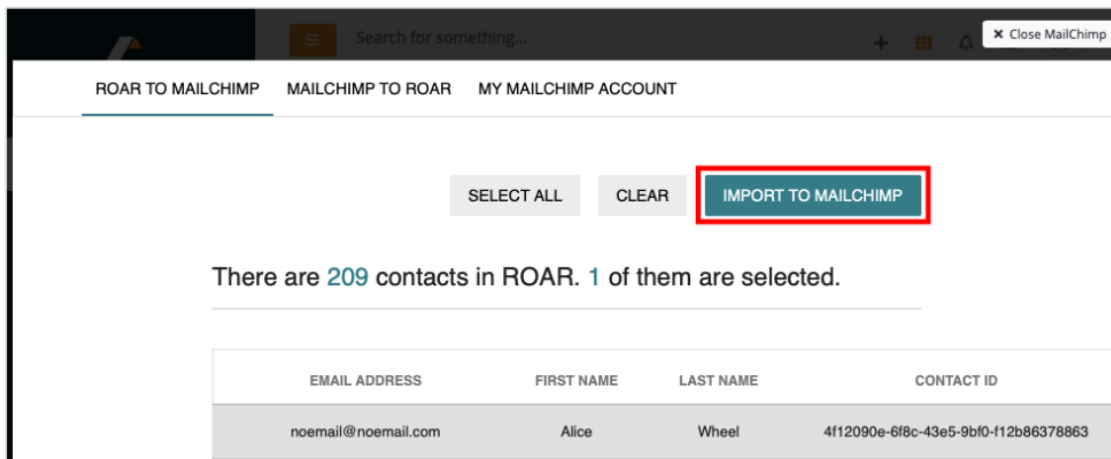# Importing Contacts from DASH to Mailchimp

1. Select the contact(s) that you want to import

    - In the Imports tab you can select individual contacts by clicking on the email addresses of the contacts.
    - Alternatively, you can select all the contacts by clicking Select All.
    - If you have accidentally clicked 'Select All', you can clear the selections by clicking on Clear

    •   Note – screenshots in this guide has references to ROAR

2. Select the Import to Mailchimp

Note: Contacts imported from DASH will appear under the **audience** that was specified as default when first launching the MailChimp App.

Importing Contacts from Mailchimp to DASH

You can only export a client to DASH if they are listed under the 'DASH' audience in MailChimp.

Please keep this in mind, as contacts is listed under any other audience in MailChimp will not appear as a contact available to be exported to DASH.

1. Select the **Export** tab