SMRT Systems Help Center

SMRT Systems Help Center > Learning Center > Marketing

Search

Articles in this section

Email Blasts Through Mailchimp

Nick Platania

2 years ago · Updated

Follow

1. Mailchimp Account

First, visit https://mailchimp.com and create an account if you do not already have one! You can select "I'll do this later" in most areas if you are ever unsure what to select.

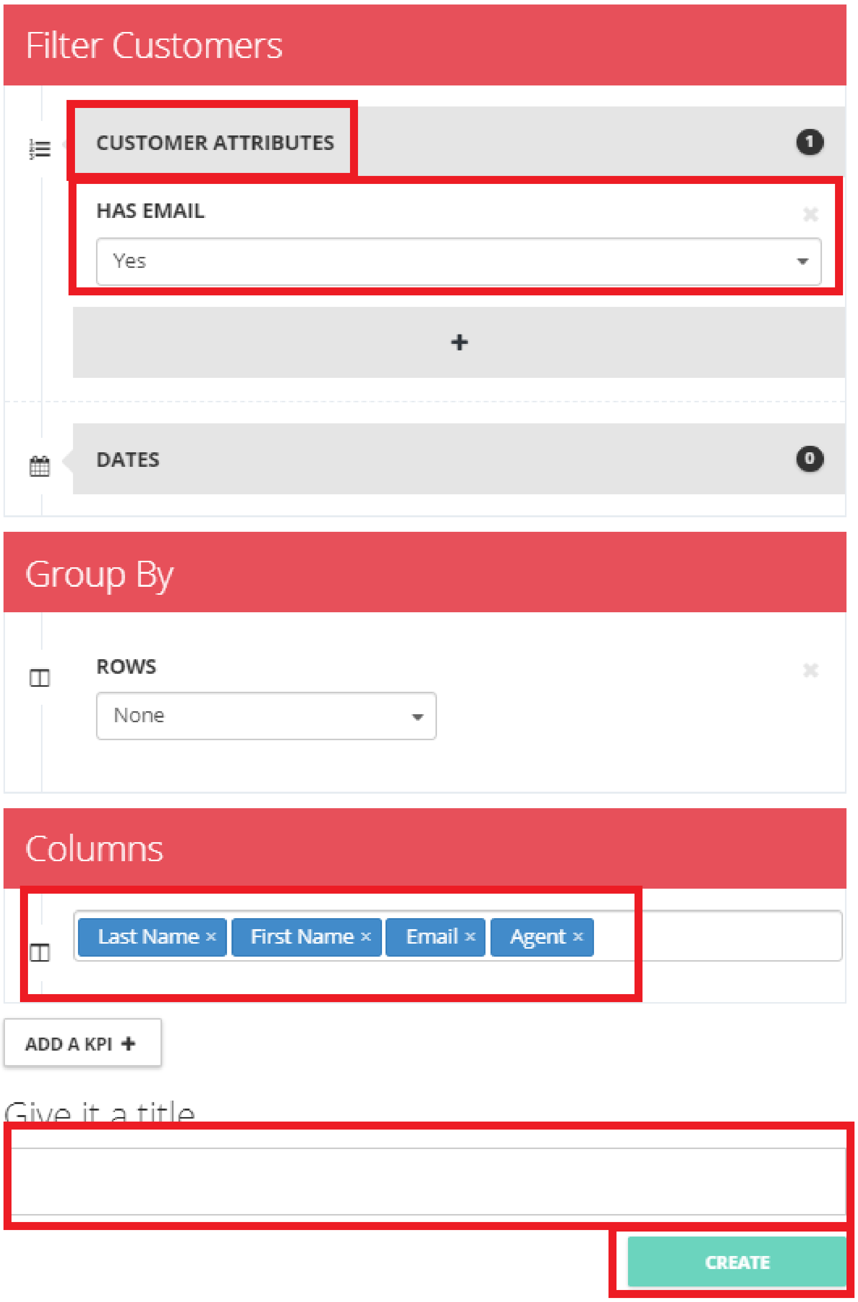
2. Customer Email KPI

Next, we'll need a .csv file with our customers' names, emails, and agents which we can get through a KPI. To create this KPI, navigate to Reports -> KPI Config -> New Report -> Customers.

Now configure the KPI setting on the right of your screen to mimic the image below, be sure to click "add" for the "Has Email" attribute and give the KPI a title and click "Create." Add

Help

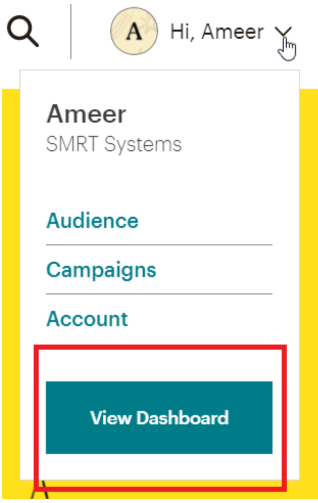
data columns as you want, we recommend adding the Customer Portal Link so that you can embed the customers' unique link in your emails.



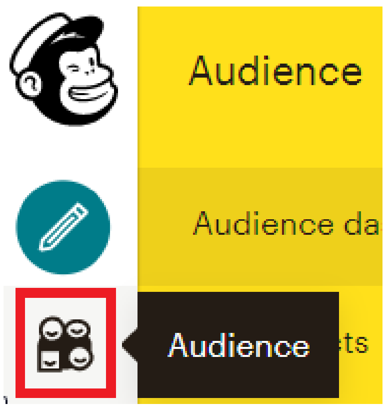
Export the new KPI to a .csv, button near the top left corner of the report.

3. Mailchimp Import

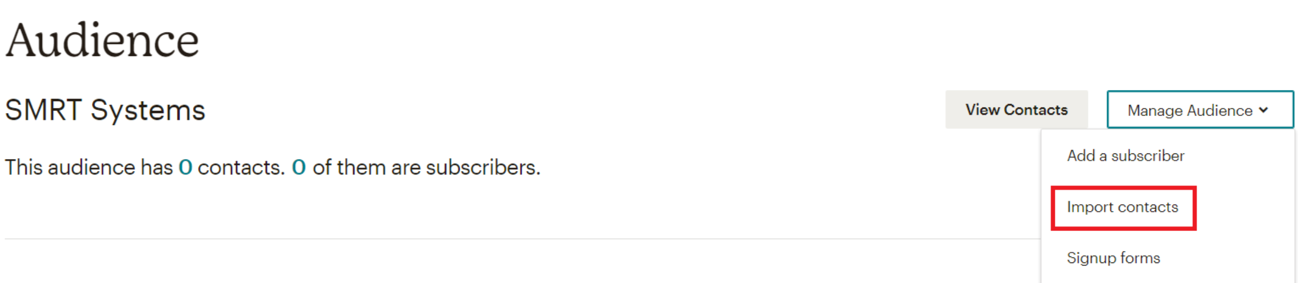
Next we can return to Mailchimp and sign in. Look for access to the Dashboard in the top right corner:



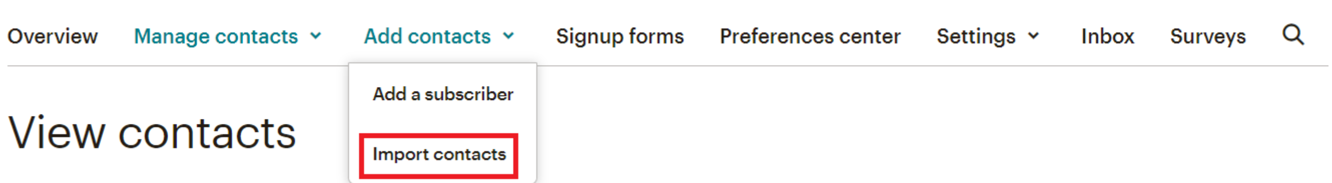
If you are already at the Dashboard or once there, select "Audience":



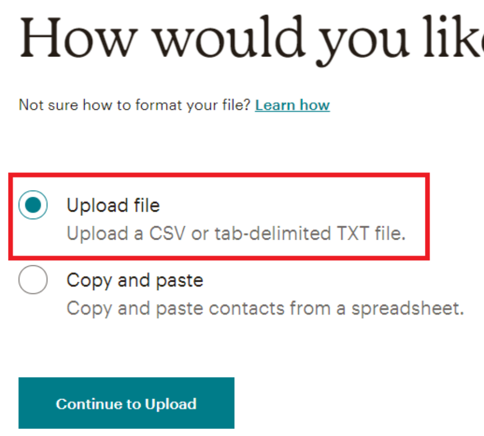
If you have not already created an email List, select "Import contacts" on the right under the "Manage Audience" button:



If you do already have a List from the account creation, go to that List and choose "Add Contacts" -> "Import Contacts":



Choose "Upload a CSV or tab-delimited TXT file" and click "Next":



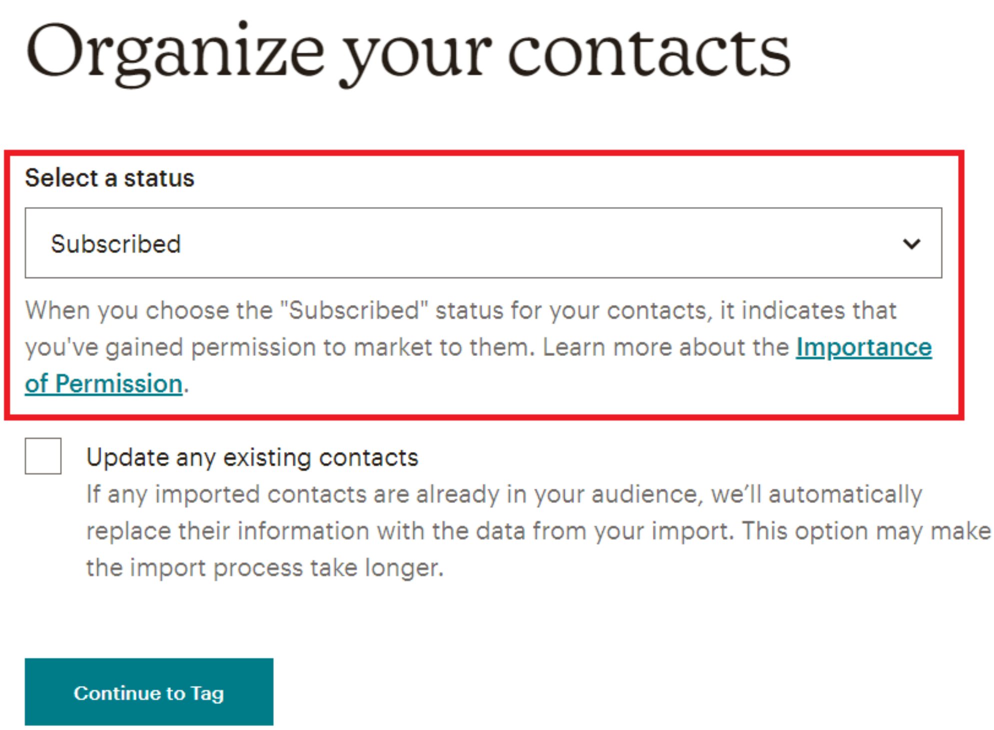
Browse for and select the final .csv file we downloaded from our Google Sheet/Excel and click "Next."

Continue the import by clicking "Continue to Organize".

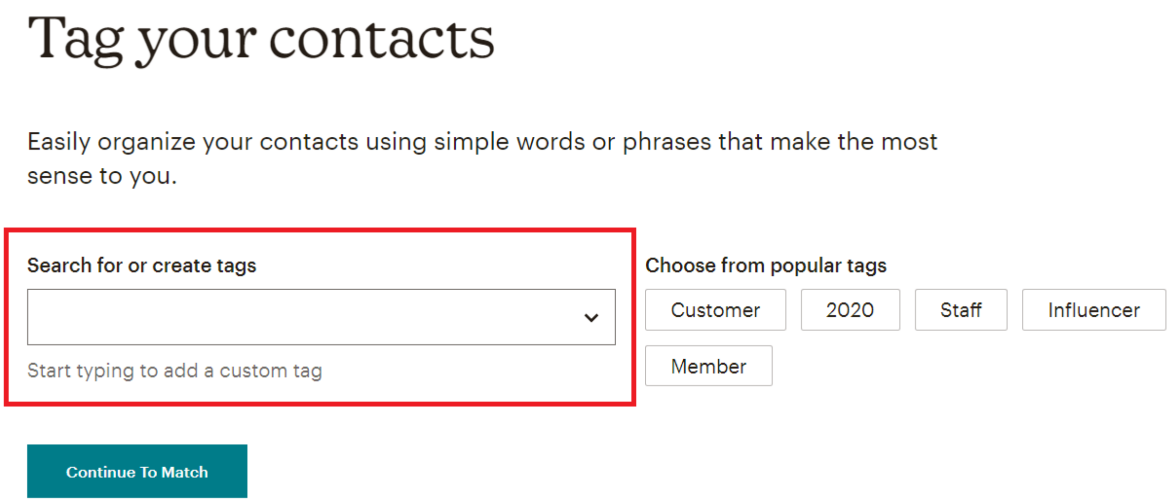
Organize your contacts by status. Each status type will display a description underneath when selected.

First time MailChimp users should choose "Subscribed" for contact status.

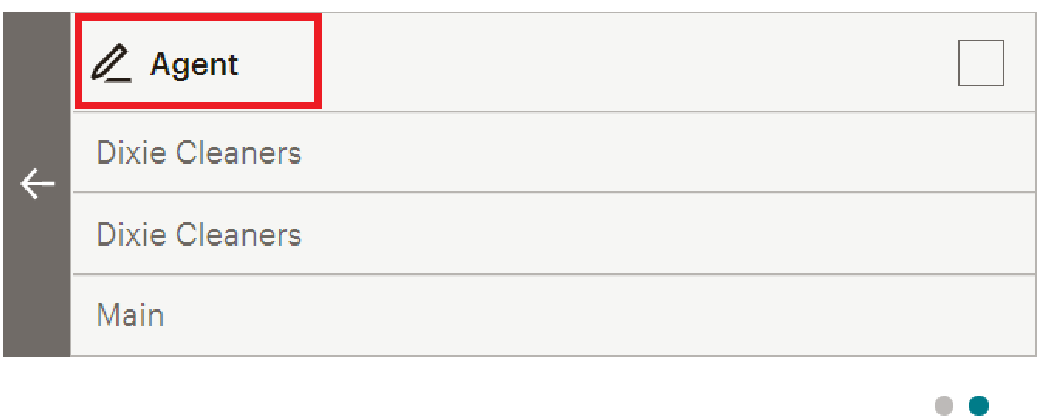
Choose "Update any existing contacts" to update or replace any existing contacts or information/data. *(e.g. a user gets a new e-mail address and needs the old one replaced)*



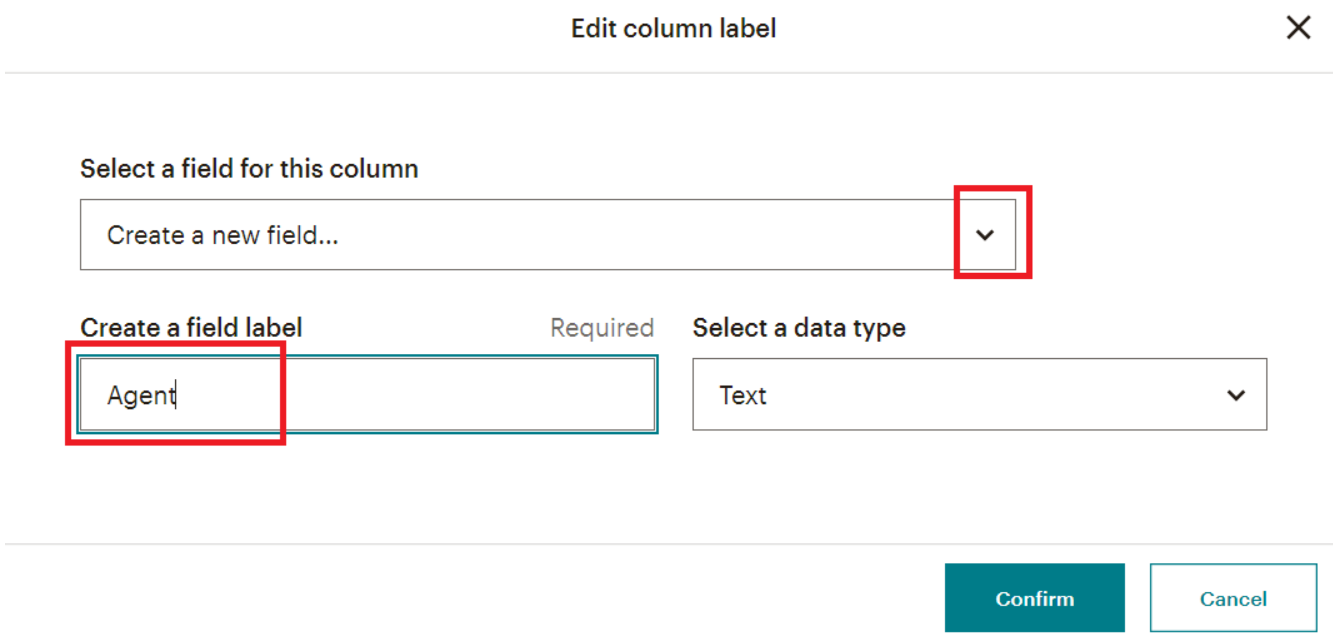
Next, you may choose to associate your contacts with "tags". Simply type a word or phrase that you want to associate with your contacts. *(when searching by tags, you can locate certain contacts by typing their "tag")*



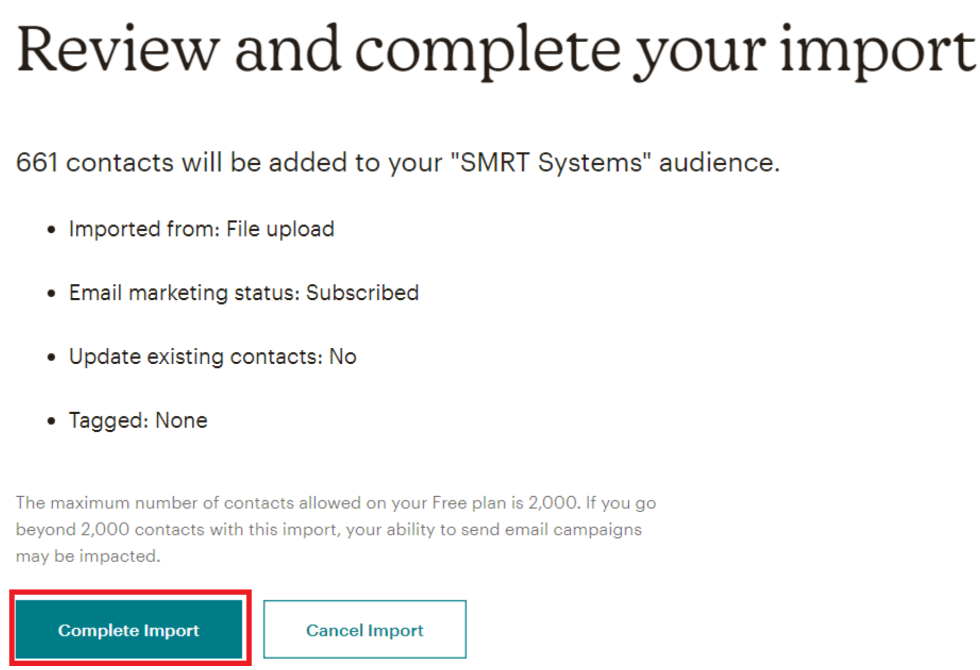
The next page will have one unmatched column for the agents, click "Agent" (*pencil tool)* to edit.



Now "Edit column label" will appear and you will click in the box "Select a field for this column". Scroll to the top and choose "Create a new field" and type in "Agent".

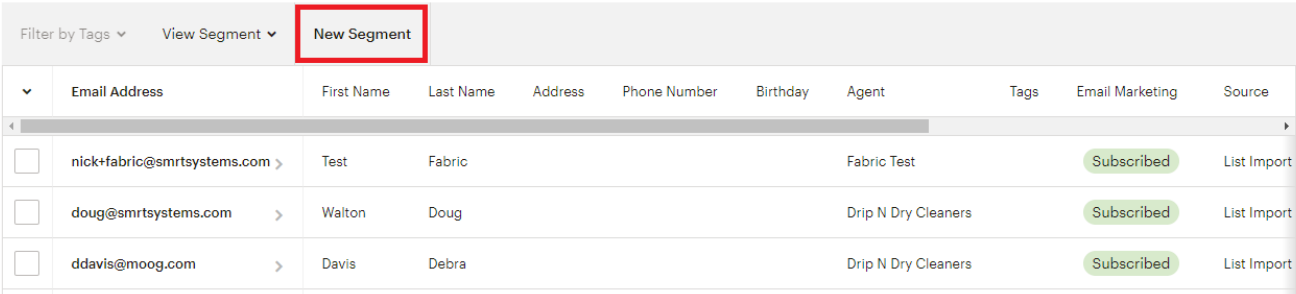


Click "Confirm," then click "Finalize Import" and finally, click "Complete Import to finish with your import!

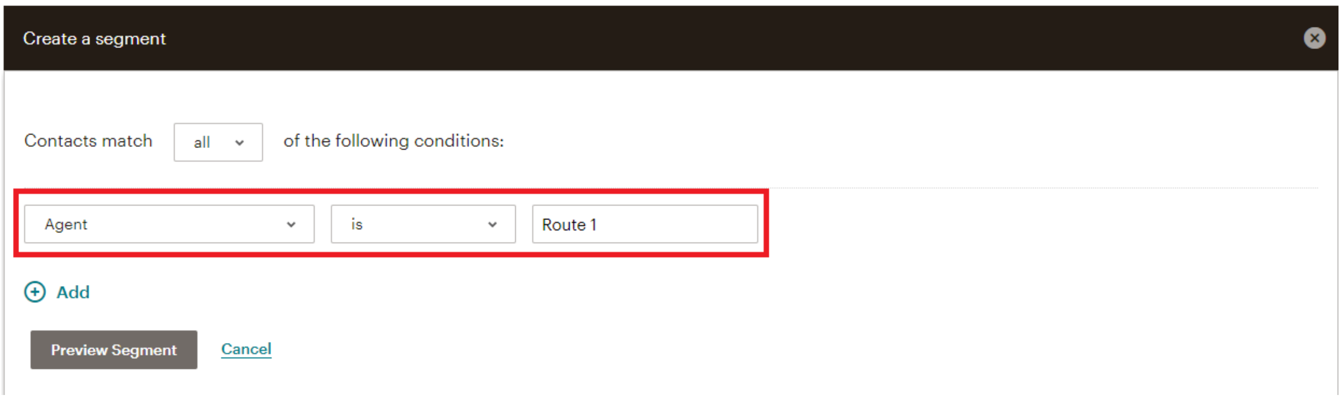


4. Mailchimp Segment - Filtering Customer List

Now we have all customers' with email addresses in Mailchimp and may need to break that list down further to send messages to specific Agents (stores/routes). To do this, open your new List (may be titles your business name) and choose "New Segment":



On this screen, we'll filter our customer list by a certain Agent. I use the example "Route 1" here. **NOTE: The text you type into the box here to the right of "is" needs to EXACTLY match the Agent name from SMRT.**

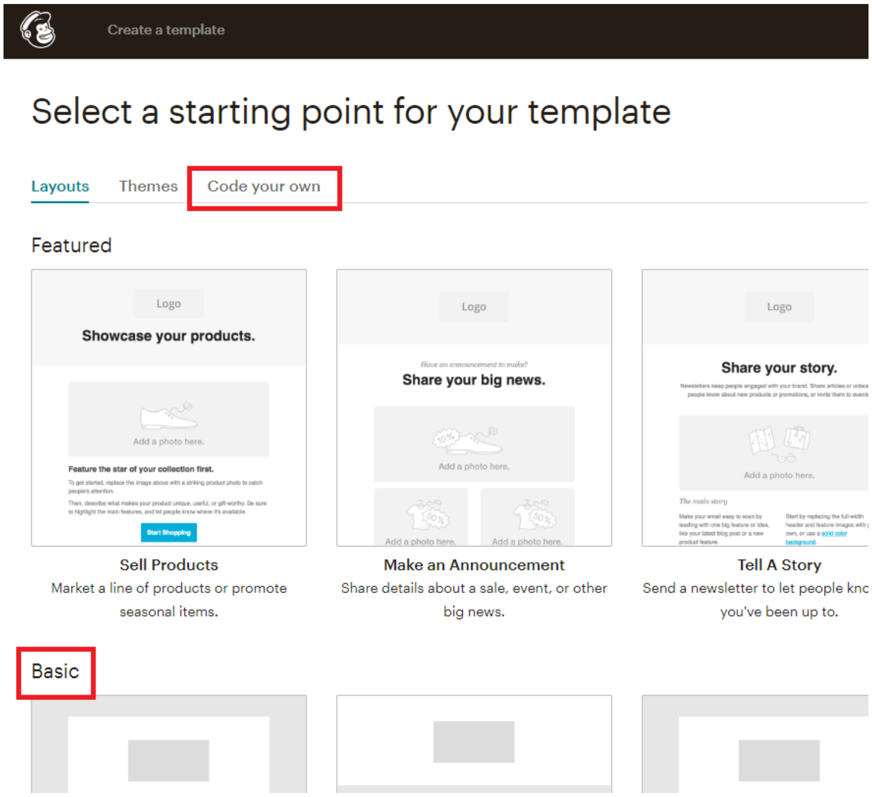


Last, select "Preview Segment" followed by "Save Segment." Name your segment (probably the Agent name you filtered by) and click "Save" one last time. This will take you back to the screen for the segment you just created.

This can be repeated as many times as necessary to separate all customers into the necessary Segments to target specific Agent(s).

5. Creating a Template

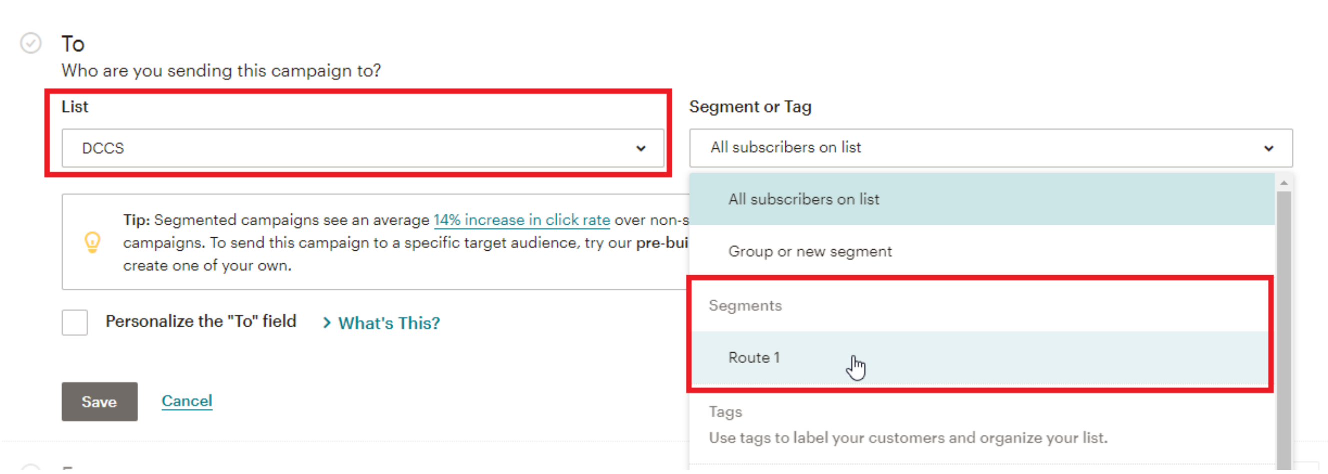
Second to last step! A template needs to be created to send out, choose "Templates" from the Mailchimp dashboard then "Create Template" near the top right. Here you can choose to start with one of the Basic templates or "Code Your Own" if you create a template with HTML.



6. Creating a Campaign - Email Blast!

With everything in place the last thing we need is to set up a Campaign. Choose "Campaigns" from the dashboard and "Create Campaign" near the top right. Select "Email," name your campaign, and click "Begin"!

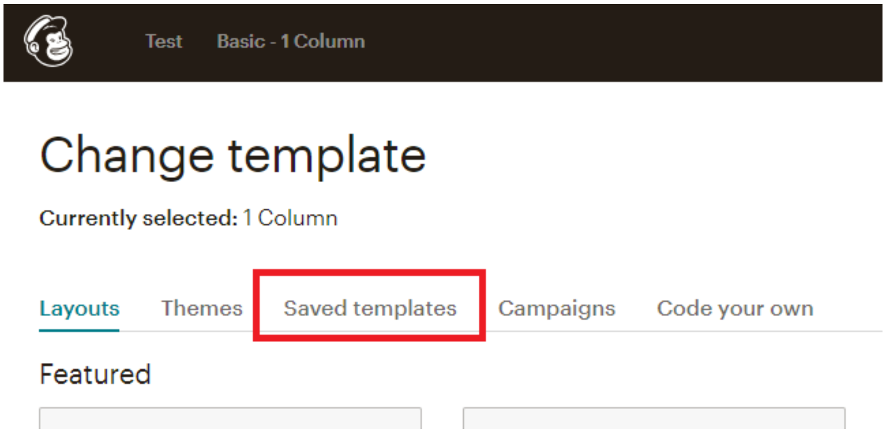
First fill in the "To" options. Select your "List" and use "Segment and Tag" to choose the appropriate Segment if we only want to send to a particular Agent(s) and then "Save":



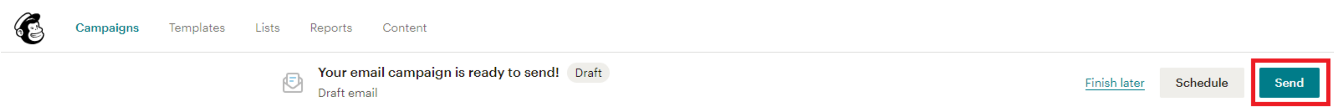
"From" should consist of your business name and main customer service email address.

"Subject" of the email campaign can be filled in here.

For "Content," the "Design Email" button will take you to a screen where you can choose from your "Saved Templates":



Once these 4 options have been filled out, just hit "Send" in the top right corner!:



Was this article helpful?

Yes No

1 out of 1 found this helpful

Return to top

Recently viewed articles

Recommended Event Based Emails

Setting Up Birdeye

Birdeye Segment Setup

Customer.io Setup

Merging Items With 2 Barcodes

Related articles

Employee Levels

EZ Press Heat Sealer

Storage Inventory

Customer.io Setup

KPI Data Fields

Comments

0 comments

Be the first to write a comment.