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Email Blasts Through Mailchimp



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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.

The screenshot displays the Mailchimp report builder interface. It features three main sections: 'Filter Customers', 'Group By', and 'Columns'. The 'Filter Customers' section includes a 'CUSTOMER ATTRIBUTES' filter with a dropdown menu set to 'HAS EMAIL' and a value of 'Yes'. Below this is a 'DATES' filter. The 'Group By' section has a 'ROWS' dropdown menu set to 'None'. The 'Columns' section shows a list of columns: 'Last Name', 'First Name', 'Email', and 'Agent'. Below the columns is an 'ADD A KPI' button. At the bottom, there is a text input field labeled 'Give it a title' and a green 'CREATE' button. Red boxes highlight the 'CUSTOMER ATTRIBUTES' filter, the 'HAS EMAIL' dropdown, the 'Columns' section, and the 'CREATE' button.

Filter Customers

CUSTOMER ATTRIBUTES 1

HAS EMAIL

Yes

+

DATES 0

Group By

ROWS

None

Columns

Last Name × First Name × Email × Agent ×

ADD A KPI +

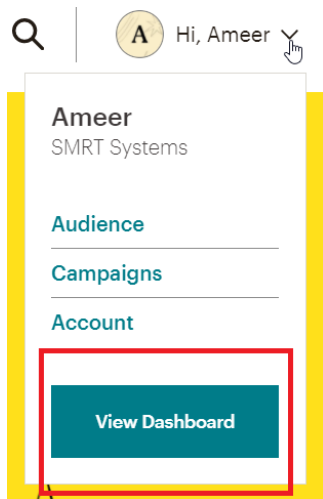
Give it a title

CREATE

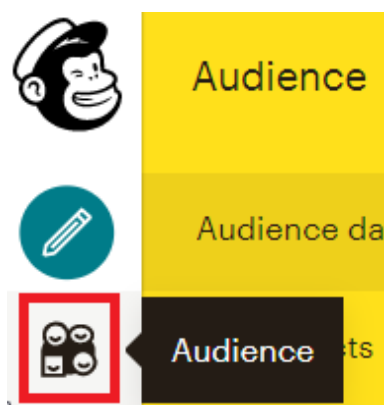
Export the new KPI to a .csv, button near the top left corner of the report.

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":

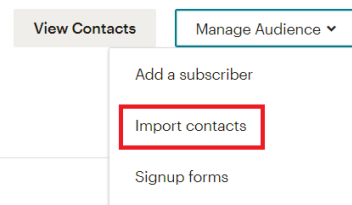


If you have not already created an email List, select "Import contacts" on the right under the "Manage Audience" button:

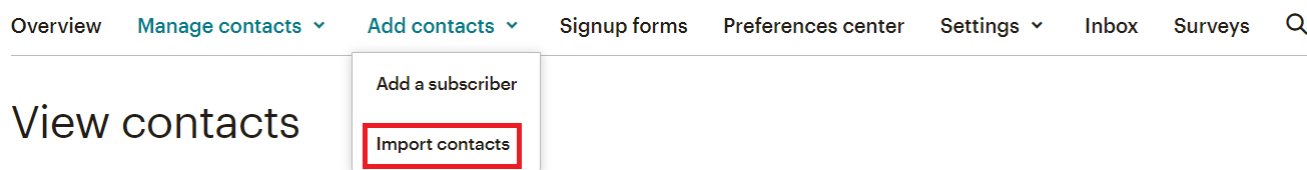
Audience

SMRT Systems

This audience has 0 contacts. 0 of them are subscribers.



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":

How would you like to import your contacts?

Not sure how to format your file? [Learn how](#)

☒ Upload file
Upload a CSV or tab-delimited TXT file.

☐ Copy and paste
Copy and paste contacts from a spreadsheet.

Continue to Upload

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)

Organize your contacts

Select a status

Subscribed



When you choose the "Subscribed" status for your contacts, it indicates that you've gained permission to market to them. Learn more about the [Importance of Permission](#).

☐

Update any existing contacts

If any imported contacts are already in your audience, we'll automatically replace their information with the data from your import. This option may make the import process take longer.

Continue to Tag

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")

Tag your contacts

Easily organize your contacts using simple words or phrases that make the most sense to you.

Search for or create tags

Start typing to add a custom tag

Choose from popular tags

Customer

2020

Staff

Influencer

Member

Continue To Match

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

Agent

Dixie Cleaners

Dixie Cleaners

Main

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".

Edit column label



Select a field for this column

Create a new field...



Create a field label

Required

Select a data type

Agent

Text



Confirm

Cancel

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

Review and complete your import

661 contacts will be added to your "SMRT Systems" audience.

- Imported from: File upload
- Email marketing status: Subscribed
- Update existing contacts: No
- Tagged: None

The maximum number of contacts allowed on your Free plan is 2,000. If you go beyond 2,000 contacts with this import, your ability to send email campaigns may be impacted.

Complete Import

Cancel 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":

Filter by Tags ▾ View Segment ▾ New Segment										
▼	Email Address	First Name	Last Name	Address	Phone Number	Birthday	Agent	Tags	Email Marketing	Source
<input type="checkbox"/>	nick+fabric@smrtsystems.com >	Test	Fabric				Fabric Test		Subscribed	List Import
<input type="checkbox"/>	doug@smrtsystems.com >	Walton	Doug				Drip N Dry Cleaners		Subscribed	List Import
<input type="checkbox"/>	ddavis@moog.com >	Davis	Debra				Drip N Dry Cleaners		Subscribed	List Import

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.**

Create a segment ✕

Contacts match

all ▾

 of the following conditions:

Agent ▾

is ▾

Route 1

+ Add

Preview Segment [Cancel](#)

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

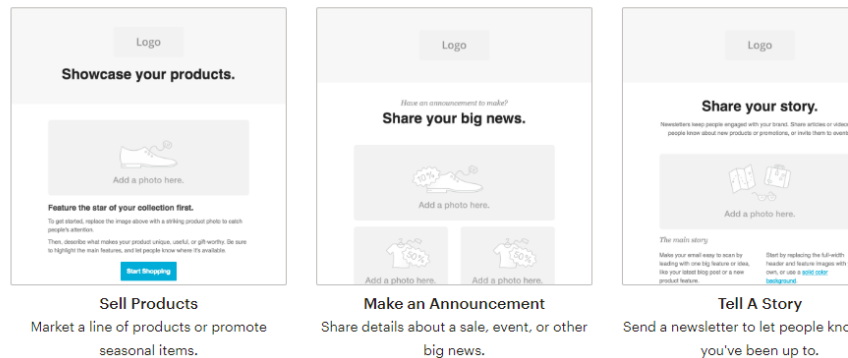
Second to last step! A template needs to be created to send out, choose "Templates" from the Mailchimp dashboard then "Create Template" near the top right. Here you can choose to start with one of the Basic templates or "Code Your Own" if you create a template with HTML.



Select a starting point for your template

Layouts Themes **Code your own**

Featured



Basic



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":

✓ To
Who are you sending this campaign to?

List
DCCS

Segment or Tag
All subscribers on list

Tip: Segmented campaigns see an average 14% increase in click rate over non-segmented campaigns. To send this campaign to a specific target audience, try our pre-built segments or create one of your own.

☐ Personalize the "To" field > What's This?

Save Cancel

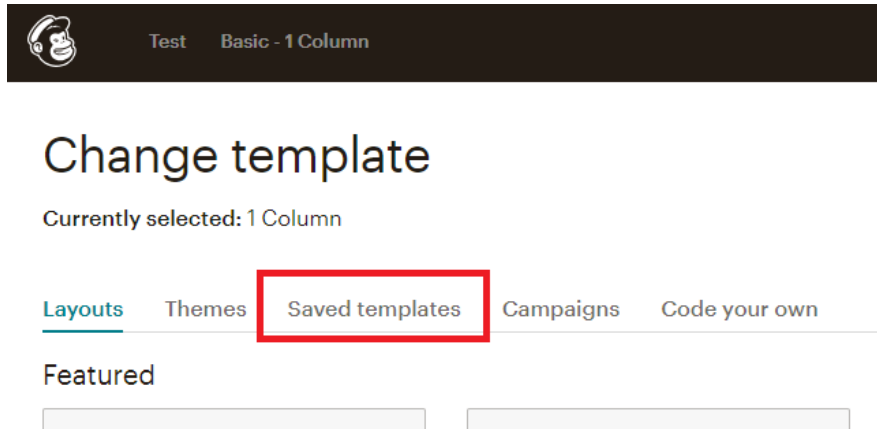
Segments
Route 1

Tags
Use tags to label your customers and organize your list.

"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!:



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