



BROKERBASE



**INTUIT
mailchimp**

MailChimp is a versatile email marketing tool to do customized emails to your clients. BrokerBase provides some options to help get you started.

You can get a MailChimp account at www.mailchimp.com. Accounts start at free for up to 500 contacts and 1,000 emails per month. Other limitations of the free plan include MailChimp branding in emails, no automation, no importing templates, and no importing from BrokerBase without removing the existing audience.

To take advantage of BrokerBase options with MailChimp, at least a Standard account is needed. (see <https://mailchimp.com/pricing/marketing/compare-plans/?currency=CAD>)

How to Bring BrokerBase Clients into MailChimp

Prerequisites

- BrokerBase (www.brokerbase.ca) account with clients imported from Filogix
- MailChimp account with at least one available Audience slot left

Steps

1. Log into your MailChimp account
2. Get the API key:
 - a. Click on the circle in the top right corner.
 - b. Click on **Profile**, and then **Extras** tab, and choose **API Keys**.
 - c. Click **Create A Key**. Copy the new API Key. (You will not be able to see it again after this so you may want to save it in a safe location)
3. Log into your BrokerBase account and go into your profile (**Click your profile photo in the top right > My Profile**)
4. Scroll down to the **Sync Settings** section. Paste the API Key from MailChimp into the **MailChimp APIKey** field (right-click, Paste). Scroll to the bottom and press the **SAVE** button.
5. Go into your Marketing Dashboard (**TOOLS > E-Marketing > Marketing Dashboard > Marketing Dashboard**)
 - a. Make sure **Sort** is set to **Creation Day: Newest First**

- b. In the **Select a Data Export Destination** dropdown, select **MailChimp**
- c. Click **Export** to start the process of exporting all your client data to your MailChimp account. It can take up to 30 minutes to fully export all the data if you have many clients in your dashboard. Your clients will be under the **BrokerBase** list in MailChimp.



6. **Repeat step 5 whenever you want to add new any new clients from your dashboard to MailChimp. We recommend making it part of your weekly maintenance routine.**

Notes



- **BrokerBase syncs in the order they appear in the Dashboard.** If you sync in any other order than newest first, then repeat clients may have their older information synced instead.
- The export only sends clients that are marketable. Clients without email addresses, or have previously unsubscribed will not be sent to MailChimp
- **The export does not update or overwrite clients already in MailChimp. If a client's information changes after it has been exported to MailChimp, you would need to manually update the client in MailChimp.**
- The Personal and Product marketing selection does not get sent to MailChimp. You will need to select which clients receive which campaigns from within MailChimp.
- Like with BrokerBase marketing, remember to always be CASL compliant. Only send to clients that have provided consent. An empty field has been included in the MailChimp subscribers that you can specify the client's CASL status, which you can use to target clients using MailChimp's segment feature.



Setting the List Details in MailChimp

Emails sent pull your info from MailChimp's contact info in the BrokerBase list. It is important to set this correctly so that emails have your accurate contact info, and so that emails can meet CASL content rules.

Steps

1. In MailChimp, click on your profile name in the top right of MailChimp, and select **Profile**
2. Under **Settings**, select **Contact Information**
3. Scroll down to **Audiences in this account**, and find the **BrokerBase** list, and click **Edit Audience Information** underneath
4. Complete/correct the profile information, and press **Save**.

Importing BrokerBase's MailChimp Email Templates into MailChimp

If you want to recreate some BrokerBase-type marketing in MailChimp, we provide some customized templates to help get you started.

Prerequisites

- BrokerBase account with clients imported from Filogix
- MailChimp account (Standard plan or better)

Steps

1. Log into BrokerBase.
2. Download the email template:
 - a. Go to **TOOLS > E-Marketing > MailChimp Email Templates**
 - b. Go to the appropriate tab with the template you want. You can preview the template by clicking the name. Then click **Download** to the right of the template. That will download the template to your computer as a HTML file.
3. Upload the template to MailChimp:
 - a. Log into your MailChimp account
 - b. Under Content, Click the **Email Templates** tab
 - c. Click **Create Template**
 - d. Click the **Select the Classic Builder** option
 - e. Select the **Code your own** tab, then click **Import HTML**
 - f. Enter an appropriate name for your template for later reference. Click the **Browse** button and locate the html file you previously downloaded. Click **Upload**.
 - g. Press the **Save** button, then **Save and Exit** in the bottom right corner.

Notes

- The templates will be editable from within MailChimp, but may require some HTML knowledge depending on what needs to be edited. For easier editing, you can use MailChimp to create native templates with a simpler editor.
- The templates contain “merge tags” which will be filled in with completed info when a campaign is sent. For example, ***|FNAME|*** will be replaced with the subscriber’s first name when the email is sent. Merge tags are located in links as well, such as web page links. Make sure to complete the BrokerBase list’s contact information to include your completed contact info. You may want to send yourself a test campaign first to make sure the content is completed.
- You may wish or need to add additional content, such as license numbers. That can be done after import in the MailChimp editor.
- These templates duplicate the functionality of emails in BrokerBase. Make sure that you aren’t duplicating the same emails to the same clients by sending with both BrokerBase and MailChimp. It is recommended to use either BrokerBase or MailChimp for marketing, not both, to avoid duplications and missed unsubscribes.
- Some templates, such as the newsletters, will need to be downloaded and applied monthly to get new content.
- For sending an email campaign to your clients, that will vary depending on how you’ve set up your subscribers in MailChimp. For instructions on setting up a MailChimp

campaign, you can find instructions at <https://eepurl.com/dyilc1>. Make sure you select your template under **Saved Templates** when on the “Select a template” step.

MailChimp Help

As it is a third-party service, VERICO does not provide tech support for MailChimp. MailChimp does have an excellent knowledgebase though, such as this getting started guide at <https://mailchimp.com/help/getting-started-with-mailchimp/>. You can also contact them for support at mailchimp.com/support (paid accounts only).