# MAIL CHIMP

## GDPRO

April 2020
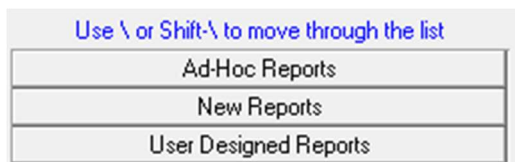
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# Introduction

Mailchimp is a well-known, popular online email marketing system that allows up to 2,000 contacts for free. This manual describes the process to import your GDPro contact list into Mailchimp.

To know more about Mailchimp, use their guide https://mailchimp.com/resources/mailchimp-101/ or contact them directly https://mailchimp.com/why-mailchimp/support/

# GDPro

Click Reports then Adhoc Reports

Go to User Designed Reports

| Use \ or Shift-\ to move through the list |
| --- |
| Ad-Hoc Reports |
| New Reports |
| User Designed Reports |

Select MailChimp

MailChimp

These are the fields:
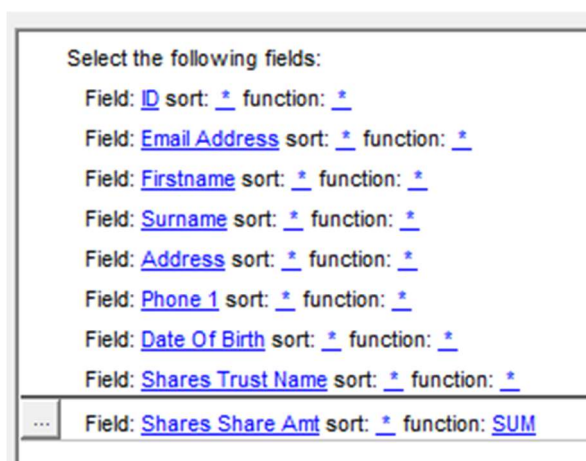
Select the following fields:

Field: ID sort: * function: *

Field: Email Address sort: * function: *

Field: Firstname sort: * function: *

Field: Surname sort: * function: *

Field: Address sort: * function: *

Field: Phone 1 sort: * function: *

Field: Date Of Birth sort: * function: *

Field: Shares Trust Name sort: * function: *

Field: Shares Share Amt sort: * function: SUM

Select the trust



Click Show in Grid



Click Export (top right)



Save the file. If you are on GDPro GO. Copy the file from your cloud desktop to your own desktop.

The file contains the list of owners with shares in the selected trust that have an email address and are not deceased.
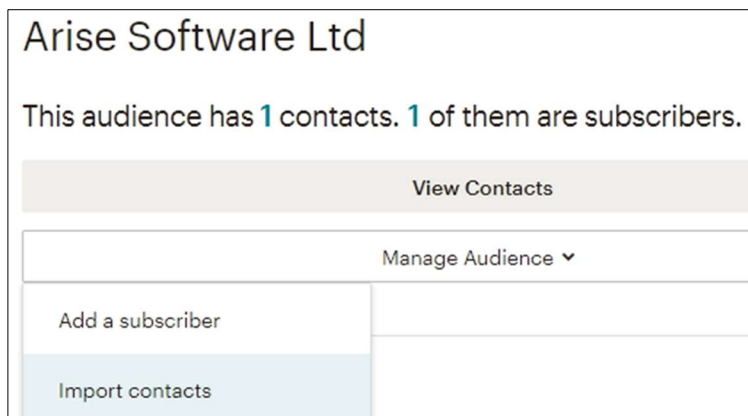
# Mail Chimp
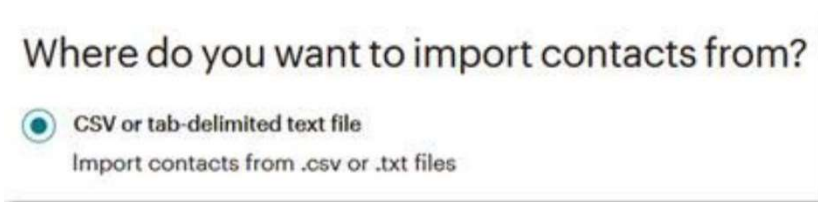
Sign up for your mail chimp account.

Once completed, click Audience.



Click Import contacts



Select CSV:

Select the file created by GDPro:
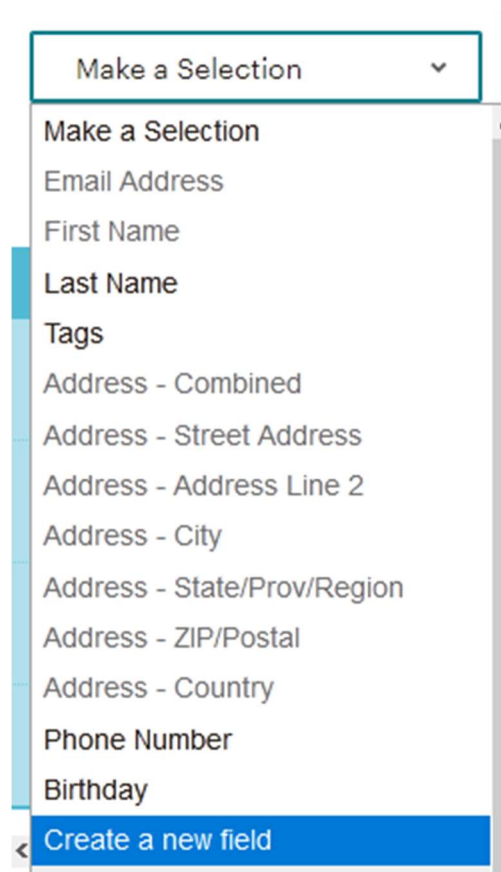


The first import, will need to tell Mail Chimp how to match the imported columns

For ID, click Edit
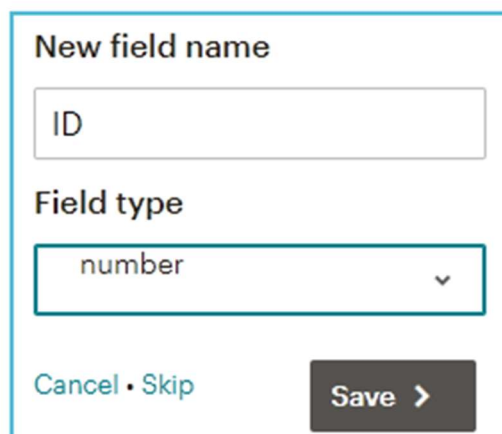
Click Create a new field



Have ID as a number then click Save

For Surname, have it matched with Last Name



For Phone_1 have it matched with Phone Number

For Date_Of_Birth have it matched with Birthday

**Date_Of_Birth**
(unmatched column)
Edit • Skip

Date_Of_Birth

Make a Selection ⌄

Make a Selection
Email Address
First Name
Last Name
Tags
Address - Combined
Address - Street Address
Address - Address Line 2
Address - City
Address - State/Prov/Region
Address - ZIP/Postal
Address - Country
Phone Number
Birthday

Click skip for both Shares_Trust_Name and SUM_of_Shares_Share_Amt

**Shares_Trust_Name**
(unmatched column)
Edit · Skip

**SUM_of_Shares_Share_Amt**
(unmatched column)
Edit · Skip

SUM_of_Shares_Share_Amt

This is the completed set of columns:

| **ID** | **Email Address** | **First Name** | **Last Name** |
|---|---|---|---|
| merge field | merge field | merge field | merge field |
| Edit · Skip | Edit · Skip | Edit · Skip | Edit · Skip |
| ID | Email_Address | Firstname | Surname |

| **Address - Combined** | **Phone Number** | **Birthday** | Will not be imported | Will not be imported |
|---|---|---|---|---|
| merge field | merge field | merge field | Edit | Edit |
| Edit · Skip | Edit · Skip | Edit · Skip | | |
| Address | Phone_1 | Date_Of_Birth | Shares_Trust_Name | SUM_of_Shares_Share_Amt |

Complete the import.

For more information or assistance:

https://mailchimp.com/resources/mailchimp-101/ or contact them directly
https://mailchimp.com/why-mailchimp/support/

arisesoftware