

MAIL CHIMP

GDPRO

April 2020

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Introduction

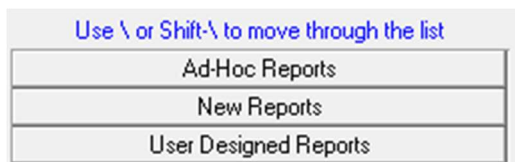
Mailchimp is a well-known, popular online email marketing system that allows up to 2,000 contacts for free. This manual describes the process to import your GPro contact list into Mailchimp.

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

GPro

Click Reports then Adhoc Reports

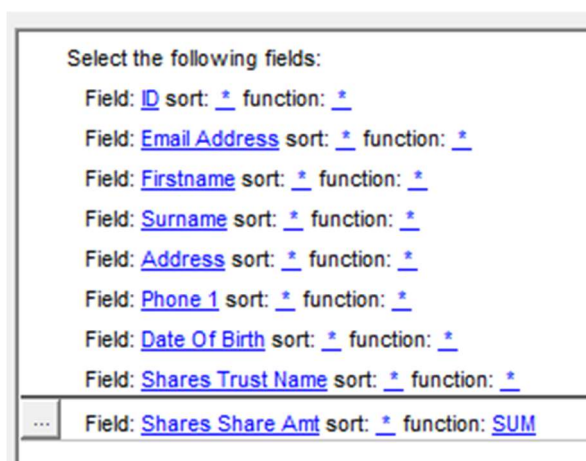
Go to User Designed Reports



Select MailChimp



These are the fields:



Select the trust

☒ Select records where all of the following apply

☒ Records where Email Address is not empty

☒ Records where Deceased is equal to No

☒ Records where Email Address is not equal to *

... ☒ Records where Shares Trust ID is equal to [dropdown]

☒ Records where Shares Total Shares is greater than 0

Click Show in Grid

Show in Grid Preview Create Layout To XLS Add Report Dele~~t~~e Report Copy Report ?

Click Export (top right)

Preview

Export

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.

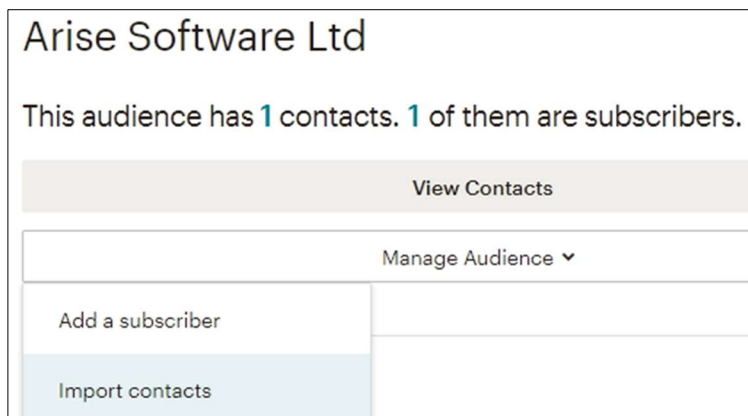
Mail Chimp

Sign up for your mail chimp account.

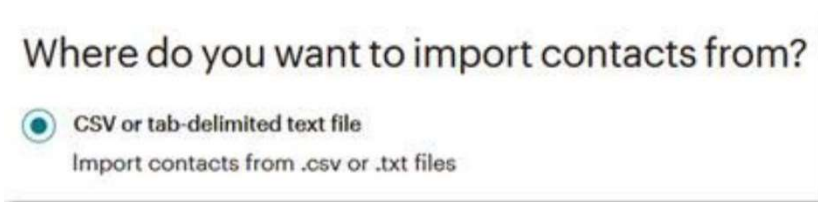
Once completed, click Audience.



Click Import contacts



Select CSV:



Select the file created by GPro:

Import from CSV file

Upload file

gdpro list.csv

Browse

Acceptable file types: CSV or [tab-delimited text files](#).



Importing contacts could raise your contact count above your current plan limit. You may need to upgrade to a paid plan before you can send a campaign to your new audience.

Duplicate addresses will be removed. We do not send confirmation emails to imported addresses and trust that you've gathered [proper permission](#) to send to every address in your audience.

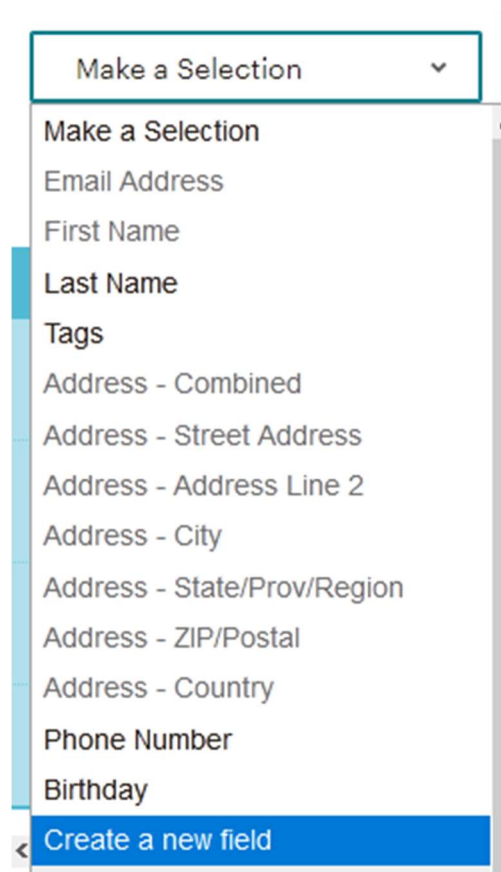
The first import, will need to tell Mail Chimp how to match the imported columns

For ID, click Edit

ID
(unmatched column)
[Edit](#) • [Skip](#)

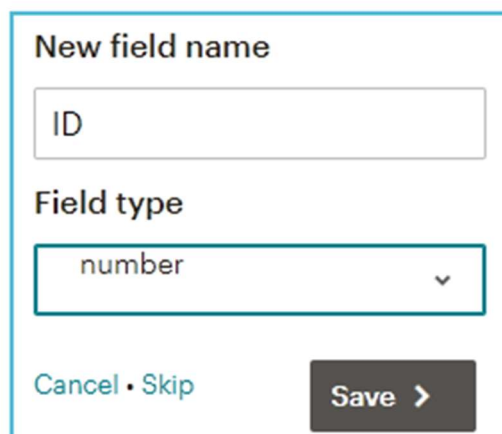
ID

Click Create a new field



A screenshot of a dropdown menu. The top item is "Make a Selection" with a downward arrow. Below it is a list of field types: "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", and "Birthday". At the bottom of the list is a blue button labeled "Create a new field".

Have ID as a number then click Save



A screenshot of a form titled "New field name". It has a text input field containing "ID". Below it is a dropdown menu labeled "Field type" with "number" selected. At the bottom left are the links "Cancel" and "Skip". At the bottom right is a dark grey button labeled "Save" with a right-pointing arrow.

For Surname, have it matched with Last Name

Surname
(unmatched column)
[Edit](#) • [Skip](#)

Last Name ▾
Make a Selection
Email Address
First Name
Last Name

For Phone_1 have it matched with Phone Number

Phone_1
(unmatched column)
[Edit](#) • [Skip](#)

Phone Number ▾
< Back Save > Skip
Phone_1

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:

| | | | |
|---|--|---|--|
| <div>ID merge field Edit • Skip</div> | <div>Email Address merge field Edit • Skip</div> | <div>First Name merge field Edit • Skip</div> | <div>Last Name merge field Edit • Skip</div> |
| ID | Email_Address | Firstname | Surname |

| | | | | |
|---|---|---|--|--|
| <div>Address - Combined merge field Edit • Skip</div> | <div>Phone Number merge field Edit • Skip</div> | <div>Birthday merge field Edit • Skip</div> | <div>Will not be imported Edit</div> | <div>Will not be imported Edit</div> |
| 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/>