How Do I Add a Person To a Mailing List?
In This Tutorial You Will Learn:

1. The difference between an **Auto-Mailing list** and **Custom Mailing List**

2. How to add a person to a Custom Mailing List such as the “Events” Mailing List

3. How to add a person to an Auto-Mailing list including:
   
   1. **Active Volunteer** Mailing List
   2. **Active Member** Mailing List
   3. **Prospective Member** Mailing List
**STEP 1:** Before adding a person to any mailing list, **you must verify whether they have been added to the Newsletter.**

The Newsletter checkbox in a person’s personal profile must be check marked in order to add the person to any other mailing list in Helpful Village. You will not be able to add anyone to any mailing list if this prerequisite is not met. Here is how you access a person’s profile:
Once you are in the person’s profile select the “Newsletter” checkbox.
Auto Mailing Lists versus Custom Mailing Lists

Before adding a person to any mailing list, it is important to distinguish between: “Auto Mailing Lists” versus “Custom Mailing Lists” because the approach to adding a person on either of these two types of lists is different.
Auto Mailing Lists versus Custom Mailing Lists

**Auto Mailing Lists** like the “Active Members”, “Prospective Members” or “Active Volunteers” list cannot be modified unless the status of the person you want to add or remove has changed. In other words, these lists are dependent on specific updates made to a person’s profile status. For instance, a person will only be added to the “Active Volunteer” mailing list once he has been successfully screened and an administrator manually makes the appropriate updates on the person’s profile (more on how this is done below).

**Custom Mailing List:** On the other hand, making modifications to a Custom Mailing List like the “Events Mailing Lists” mailing is much more straightforward. Adding or removing a person from a custom mailing list is not dependent on updates made to a person’s profile but only on whether they have given their consent to being added or removed from the mailing list. Once a request has been made, a person can be added or removed from a custom mailing list by simply adding their name to the list and synchronizing the list with MailChimp (more on how this is done below).
Here, the two mailing lists boxed in red are “Custom Mailing Lists.” All others in the Mailing List group category are “Auto-Mailing Lists” which include Active Members, Active Volunteers, Prospective Donors, etc.
Adding a Person to a Custom Mailing List
Adding a Person to a Custom Mailing List: Events Mailing List

**STEP 1:** Go to **Admin > People Management > Groups**
STEP 2: Click on the Events Mailing list

You can create your own custom list too!

The groups falling under these two categories do not constitute mailing lists.
Step 3: Search the name of the person and click on “Select This User”
Step 4: The final step is to Synchronize this list with MailChimp.

Although the person selected will now appear among the other people on the list, one final step is required otherwise the person will not be added.

The final step is to "Synchronize This List with Mailchimp." By clicking on this button, the person selected will be both added to the Helpful Village Events mailing list AND to the "Helpful Village" mailing list in Mailchimp under the "Events" Custom Group.
How to Add a Person to the Auto-Mailing List

“Active Volunteer”
Step 1: Use the Search box in the upper left corner and type the name of the person you want to add to the list. Click the “Edit” button to go to the person’s profile.
Step 2: Select the Volunteer Tab and check mark the “Screened Volunteer” box. Only add a person to this mailing list if they have been properly screened.
**Step 3:** As the last step you will have to synchronize this list with MailChimp. The person will not be added to either mailing list if this step is skipped.

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**ACTIVE VOLUNTEERS**

Number of people in this group: 4  
Comments:

**LIST OF PEOPLE**

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manuel Acevedo</td>
<td>1835-B Addison Street, Berkeley</td>
</tr>
<tr>
<td>Pete Barcena</td>
<td></td>
</tr>
<tr>
<td>Daniela C.</td>
<td></td>
</tr>
<tr>
<td>Pam Dupont</td>
<td></td>
</tr>
</tbody>
</table>

This button has a dual function. It will add the person to the Helpful Village "Active Volunteer" mailing list AND automatically add the person to the corresponding mailing list on MailChimp.
How to Add a Person to the Auto-Mailing List: “Active Members”
Step 1: Go to the person’s personal profile by searching their name in the Search box provided at the top left corner then once their name appears hit EDIT.
Step 2: Click on the Member tab and then “Create Membership for this User.”
**Step 3:** In order to include a person in the “Active Member” mailing list, their status must be “Active” AND they must have an expiration date that is still valid. Then click on **Save Membership Info.**
**Step 4:** As the last step you will have to synchronize this list with MailChimp. The person will not be added to either mailing list if this step is skipped.
Adding a Person to the Auto-Mailing List: Prospective Member
Step 1: Go to the person’s personal profile

Search the person by name in the Search Box and hit Enter

Once their name appears, click on EDIT
Step 2: Click on the Prospect Tab and then Click on New Task
Step 3: Select the appropriate category for the person you want to add. Then you have to add a “follow up task” in the box provided. Then hit submit.
**Step 4:** The final step is to synchronize with MailChimp. The person will not appear in the prospective members list until you have synchronized the list with MailChimp.
If you log onto your **MailChimp** account and go to:

**List > Helpful Village > Manage Contacts**

You will see that the person has also been added to the following **Interest Groups**:

1. Members
2. Volunteer
3. Prospects
4. Custom Groups (Events).

These Interest Groups fall under the much broader Helpful Village Mailing List in MailChimp. Another way to think about it is that the Helpful Village mailing list in MailChimp is the *tree* and the Interest Groups are *the branches*. Therefore, when you “Synchronize” a mailing list in Helpful Village with MailChimp, the person will be added to the Helpful Village mailing list in Mailchimp **AND** the person will also be automatically placed in the corresponding Interest Group so that you can send specific emails to targeted groups of people. The picture in the next page should help to clarify.
# MailChimp

## Helpful Village 9

**Switch list**

<table>
<thead>
<tr>
<th>Stats</th>
<th>Manage contacts</th>
<th>Add contacts</th>
<th>Signup forms</th>
<th>Settings</th>
<th>Search</th>
</tr>
</thead>
</table>

**Toggle Columns**

- [ ] Email Address
- [ ] First Name
- [ ] Last Name
- [ ] Phone Number
- [ ] Members
- [ ] Volunteers
- [ ] Prospects
- [ ] Custom Group

### View Saved Segments

<table>
<thead>
<tr>
<th>Email Address</th>
<th>First Name</th>
<th>Last Name</th>
<th>Phone Number</th>
<th>Members</th>
<th>Volunteers</th>
<th>Prospects</th>
<th>Custom Group</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:daniela@helpfulvillage.com">daniela@helpfulvillage.com</a></td>
<td></td>
<td></td>
<td></td>
<td>Active Members</td>
<td>Active Volunteers</td>
<td>Prospective Members, Prospective Volunteers</td>
<td>Events</td>
</tr>
</tbody>
</table>
Thank You For Your Interest!