MailChimp

URL: http://www.mailchimp.com

User Account

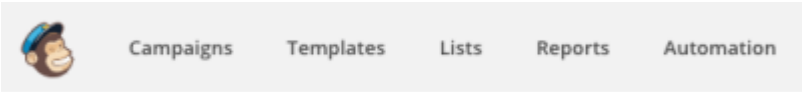
You could register an account for free.

- Create MailChimp account

If you are already the owner of the account, you could invite other co-workers.

- Invite other users with existing account (only admin can do that)
  - click Your User dropdown > Account
  - click Settings > Users
  - click Invite a User and select the appropriate role.

Navigation Menu



- After login you will see the “Dashboard” page, if not, just click the “chimp” logo

1. Add Lists

Please note that MailChimp charge based on the number of subscribers, duplicate subscriber in 2 different lists will count as 2. You should segment your contacts into smaller lists so that they will not overlap.

- Click “Lists” on the Navigation bar
  - click “Create List” (At least 1 list in order to create campaign)
  - “List name” will be seen by subscribers, make it something appropriate
  - Fill in requested information and save
  - Click “Add contacts” > Add a subscriber or Import subscribers

2. Create Templates

Before you could send out mass mail, you need to create a template.

- Click “ Templates” on the Navigation bar
  - click “Create Template”

    - Choose a proper template layout

It will then show you the template editor

- Drag-n-drop the blocks on the right-hand side to the template on the left
- You may upload your logo, image, etc. during editing.
- Edit and design the template
- Click “Preview and Test”
    - Click “Enter preview mode” to see it in Desktop, Mobile and Inbox mode
    - Click “Send a test mail” to send an email for testing
- Click save and close
- Adding the name of template



Create a template which have logo, contact info and social media etc, and modify it case by case

3. Create Campaign

You start a campaign to send out mass mail. A campaign has 5 stages.

- Click “Campaigns” on the navigation bar
    - click “Create Campaign”
    - Click Create an Email (do not choose “Create an Ad” which is not free)
    - Type a Campaign Name and click Begin

Recipients

- Choose your target list
    - choose Entire list or choose segment
    - click Next

Setup

- Adding Email Subject
    - Select Tracking from the list

Template

- Click Saved templates
    - select your desired template
- if need, you could create a new one

Design

- Make change if necessary and preview it
- You could use the “merge tags” to add some personalized message. See below

Confirm

- It will display a check list to see if the campaign has any problem
    - resolve the problem before you could proceed
- If you see “Default text content” has problem
    - read the error message. Pay attention to [Specifically, we still see “It's time to design your email” in one of your blocks] to identify the problem
    - click “Resolve” button
    - Click the “Edit” button of the corresponding block and make changes.
- Select “Schedule” for setting up delivery date and time OR “Send” for send it immediately

Optional

Merge Tags

You could include the recipient’s name in the message using merge tags to make it more personal and help avoid spam filters.

For example, *|FNAME|* *|LNAME|* will show “Bob Smith” in the email instead of “bob@example.com”. This is more personal and may help avoid spam filters.

Google Analytics

- Click “Lists”



- Select “Settings” from the dropdown
- Select “Google Analytics on archive and list pages”
- Adding Your Google Analytics Tracking ID > Save
- If no Google Analytics, can skip

Signup Form

- Click “Lists”



- Select “Signup forms” from the dropdown
- Different types signup form can be chosen
- Edit and design the signup form by adding image, logo and wording etc
- Signup form can linked with your website, Facebook or other social media

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