

# MailChimp

URL: <http://www.mailchimp.com>

## User Account

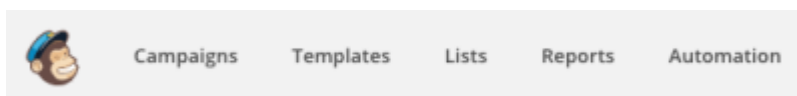
You could register an account for free.

- 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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