

# Introduction to Mailchimp

7/2021

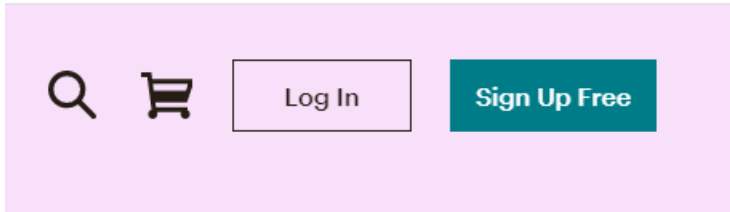


## TABLE OF CONTENTS

Getting Started: Create an Account	pg. 2 – 5
Getting Started: Create Your First Email	pg. 6 – 23
Create an Email from an Existing Account	pg. 24 – 25
Audience	pg. 26
Importing Contacts	pg. 27 – 34
Sending Email	pg. 35 – 36

## GETTING STARTED: CREATE AN ACCOUNT

1. At [www.Mailchimp.com](http://www.Mailchimp.com), click on the “Sign Up Free” button to begin creating your account.



2. Complete the “Welcome to Mailchimp” form, filling out the following form:

A screenshot of the 'Welcome to Mailchimp' registration form. The form includes three input fields: 'Email', 'Username', and 'Password'. Below the 'Password' field, there is a 'Show' button with an eye icon. At the bottom, there are four bullet points listing password requirements: one lowercase character, one uppercase character, one number, one special character, and 8 characters minimum.

**Email:** Enter the chapter email provided to you by the Ice Age Trail Alliance. (If your chapter does not have one, you may request one, or you may use the email address of the email account your chapter has set up.)

For example: [BlueHillsChapter@iceagetrail.org](mailto:BlueHillsChapter@iceagetrail.org)

**Note:** a benefit of using an email with the iceagetrail.org domain name (versus gmail.com, yahoo.com, etc.) is that the emails you send are less likely to interpreted as spam by other email providers.

**Username:** Enter your chapter's email provided to you by the Ice Age Trail Alliance (or use another user name of your choosing).

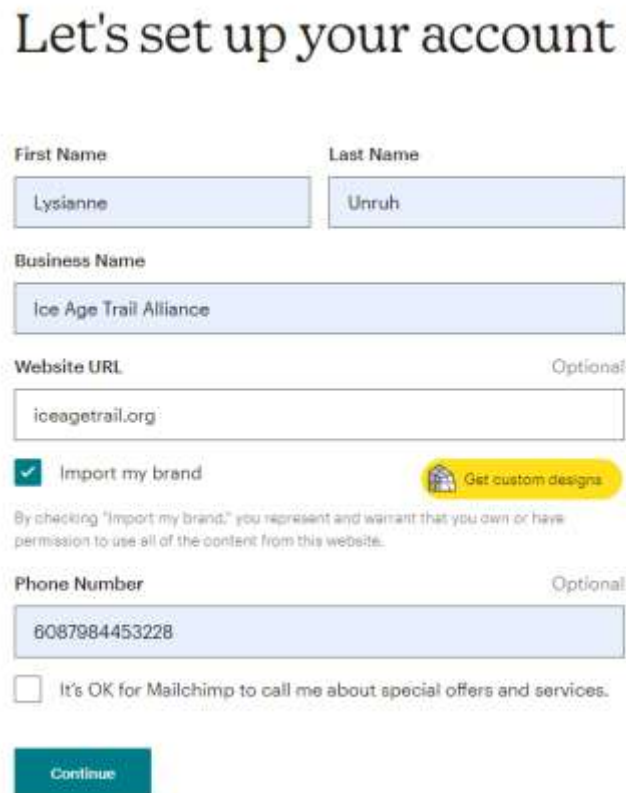
**Password:** Enter a password agreed upon by your chapter leadership.

**NOTE:** Please share the email/username/password information with your chapter's leadership. Ideally, this account information will be stored on a spreadsheet maintained by the Chapter Coordinator or designee.

3. After clicking on the "Sign Up" button, Mailchimp will send you an email containing an "Activate Account" button.
4. Click on the "Activate Account" button for confirmation.
5. Mailchimp will then open another window (be patient, it could take a moment or two) where you'll need to confirm that you are NOT a robot.

## ACCOUNT SET UP

1. Select a PLAN: Choose the FREE account option, and click "Next" button.
2. Fill in the form, allowing you to set up an account:



The screenshot shows a web form titled "Let's set up your account". The form contains the following fields and options:

- First Name:** Lysianne
- Last Name:** Unruh
- Business Name:** Ice Age Trail Alliance
- Website URL:** iceagetrail.org (Optional)
- Import my brand** (with a "Get custom design" button)
- By checking "Import my brand," you represent and warrant that you own or have permission to use all of the content from this website.
- Phone Number:** 8087984453228 (Optional)
- It's OK for Mailchimp to call me about special offers and services.
- Continue** button

### See fields:

First Name: Your first name  
Last Name: Your last name  
Business Name: [Name of Chapter] of the Ice Age Trail Alliance  
Website URL: Iceagetrail.org (optional)

Click on "Import my brand"  
Phone number: (optional)

3. Click on "Continue"
4. Add your address: Use the address determined by chapter leadership or the IATA address.

## Add your address

But why? Believe it or not, we need a physical address to make sure your emails comply with [international anti-spam laws](#). Don't have an official business address? [Learn about physical address alternatives](#)

Address line 1 (Street address or post office box)

Address line 2 Optional

City State / Province / Region

Zip / Postal code

Country

5. Confirm list of CONTACTS: Say "Yes" and select mailing list size.

## Tell us about your contacts

This can include people who signed up to receive marketing emails from your organization, or those who solely receive transactional emails. [Learn more about Mailchimp contact types](#)

Do you have a list of contacts?

- Yes
- No
- I'm not sure...

How many email contacts do you have?

**Note:** You may customize your experience: Select radio buttons as shown below. (Answering the first question generates the second question.)

## Help us determine the best experience for you

Do you sell products or services online?

- Products
- Services
- Both
- Neither

Do you intend to sell products or services online in the future?

- Products
- Services
- Both
- Neither

[Continue](#) [Skip](#)

## GETTING STARTED: CREATE YOUR FIRST EMAIL

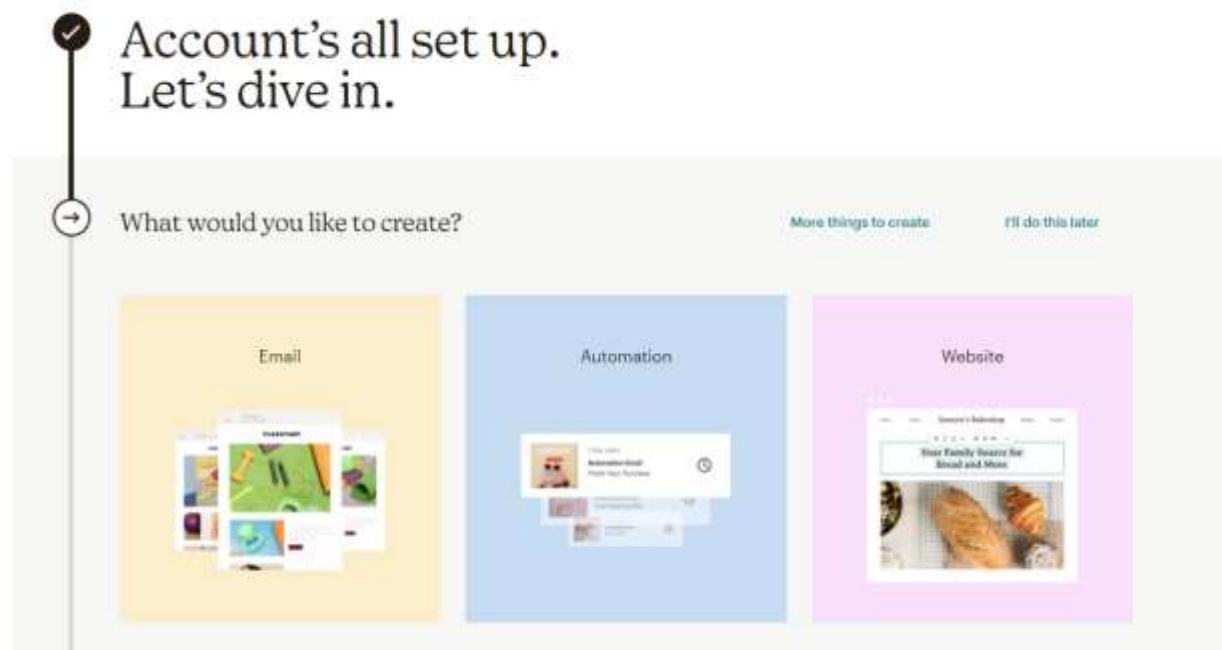
**Mailchimp Resources:**

<https://mailchimp.com/email-design-guide/>

<https://mailchimp.com/help/create-a-regular-email-campaign/>

<https://mailchimp.com/help/design-an-email-classic-builder/>

(This step-by-step guide includes useful video demonstration.)



1. Select the "Email" option by hovering over the word "Email".

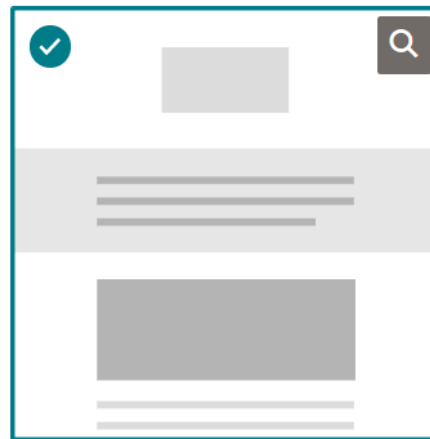
2. Select an email template.

**Note:** This module opens up in “Layouts” with an array of options presented under “Featured” and “Basic”. There are two basic template option available in the FREE Mailchimp version.

### Basic

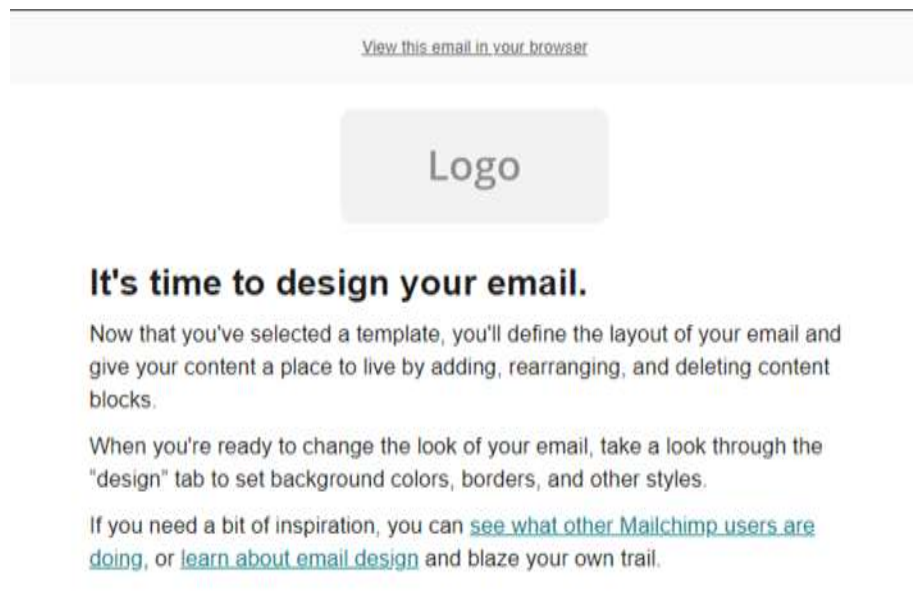


1 Column

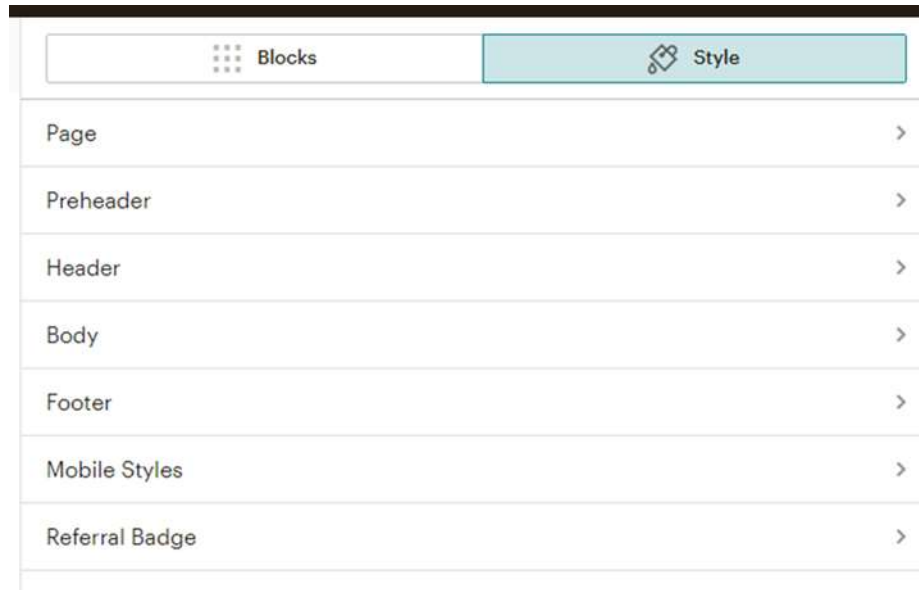


1 Column - Full Width

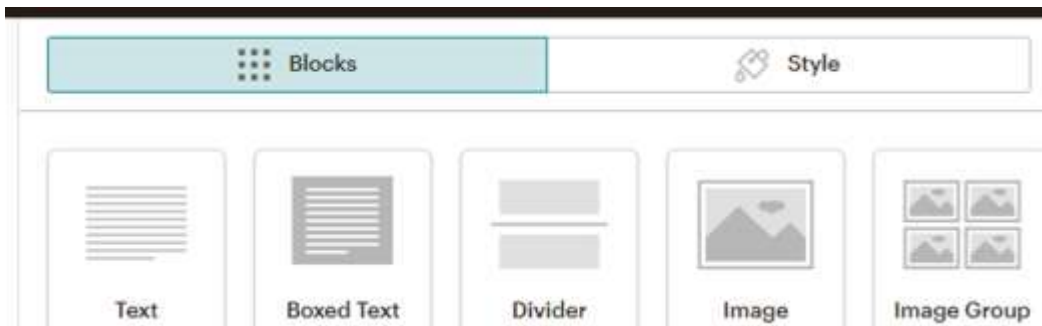
3. Choose **1 Column – Full Width**, and you’ll see the following:



4. See the right-hand side of the screen for two tabs worth of options:



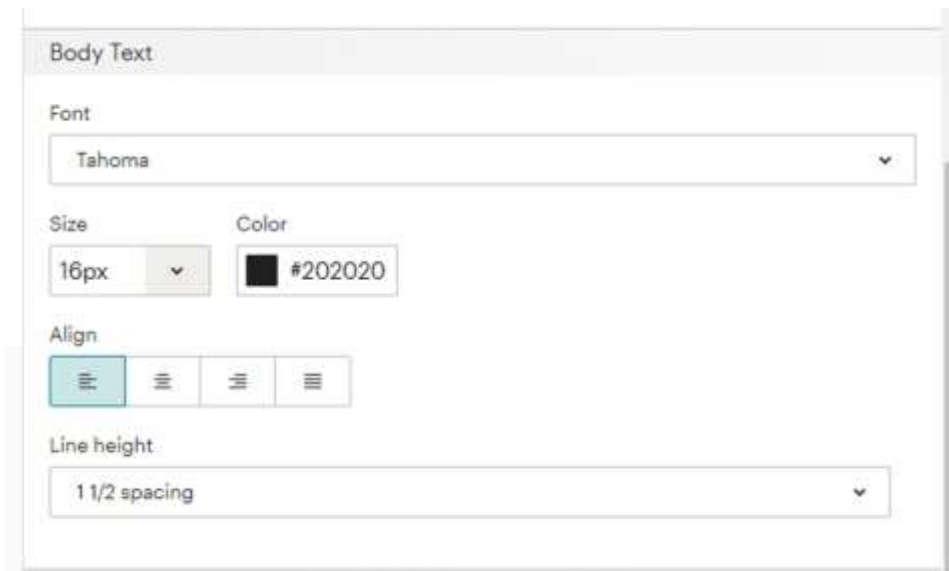
5. Choose (click on) the “Style” tab to start, and you’re presented with these options:



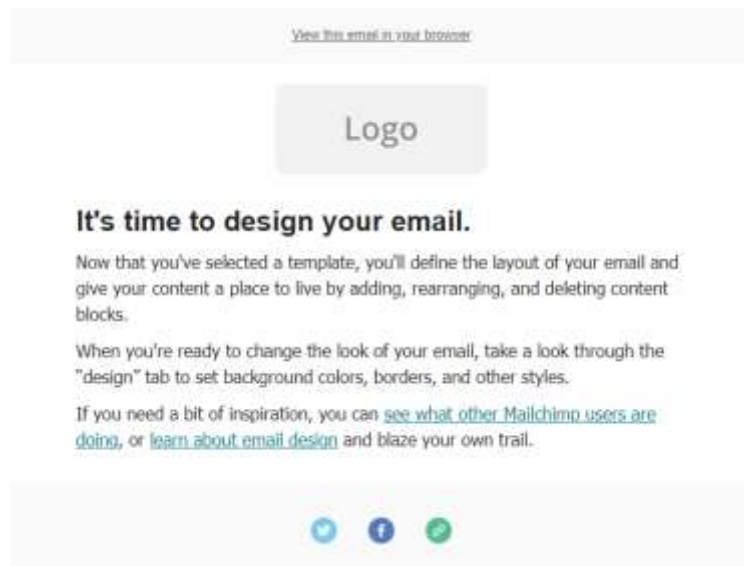


6. The Style options are where global font and color options are set. For the most part, you may leave these as they currently exist. However, click on the “Body” arrow (to the right) to open the options listed there.

**Note:** The Alliance uses the Tahoma font, 16px size and black #202020 color as shown below:



7. When you've made your changes, click the “Save” button.
8. Go back to “Blocks” to begin laying out your email.



9. **To delete blocks** you don't want, hover over the block and click on the trash can symbol. (See image below #10.)
10. **To move blocks** to a new location, grab the "cross" icon on the left-hand side and move the entire block where you want it to go. (See image below.)

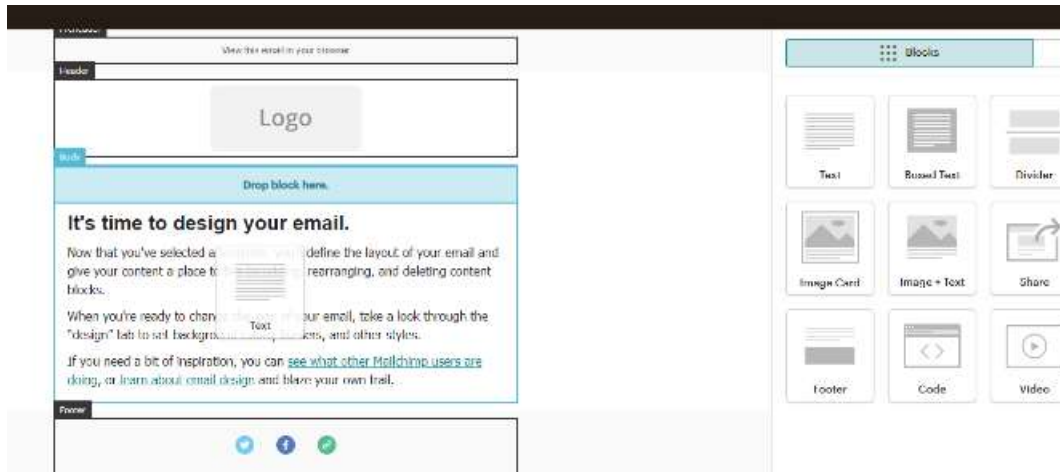


### **It's time to design your email.**

Now that you've selected a template, you'll define the layout of your email and give your content a place to live by adding, rearranging, and deleting content blocks.

When you're ready to change the look of your email, take a look through the

11. **To add the blocks you want**, left click on the feature you'd like to include. Hold down on your mouse, and drag the feature into the design area until a blue "Drop block here" box appears. Moving your mouse up and down will change the location of where the new feature will be placed once you let go of your mouse.



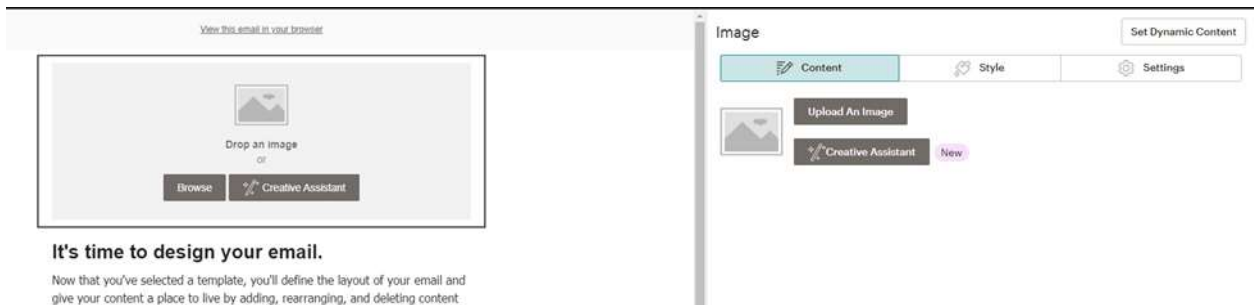
**TIP:** Things to consider when creating your email newsletter:

- Resize the photos you will use prior to uploading them to Mailchimp.
- Know how many sections of information you will have.
- Determine how to distinguish these sections of information from one another.

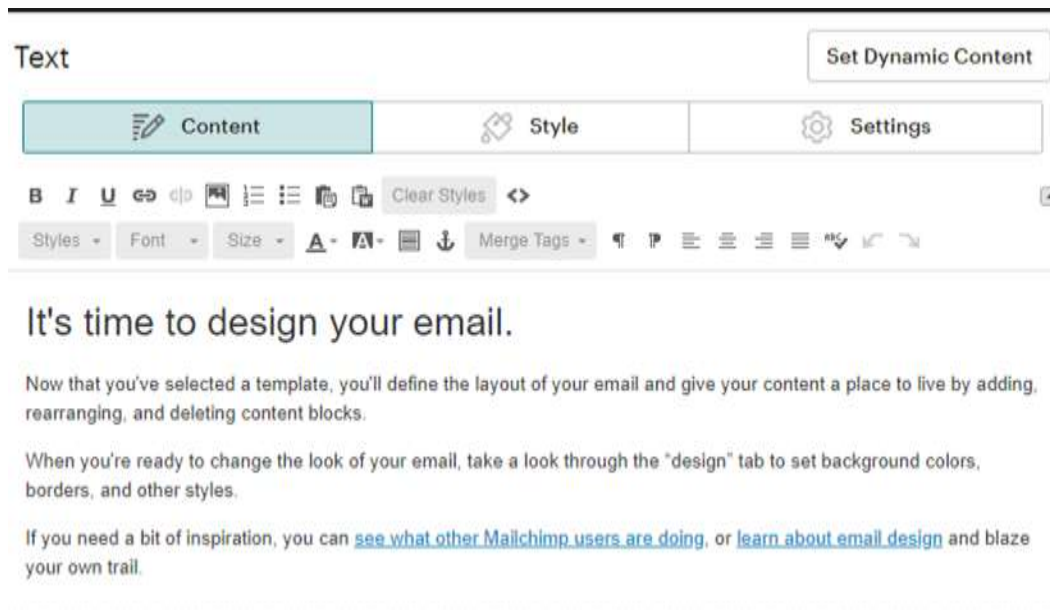
**Note: Basic Newsletter Layout:**

- A. Header photo
- B. Welcome and Intro
- C. Body of newsletter containing primary information (suggestion of Image Card or Image + Text)
- D. Boxed Text for secondary information, i.e. upcoming events, etc. (choose Alliance colors for background). The benefit of boxed text is the need for fewer photos.
- E. Ice Age Trail Alliance logo

12. Drag “Image” and drop it into the “Header” section of the email design area.
13. Click on “Drop an image” to open the right-hand panel. (See image below #14).
14. Click on “Upload An Image” to do just that. (See image below.) Ideally, you will have resized the image you want to use (we recommend a 3:2 ratio image at 600X400 pixels).

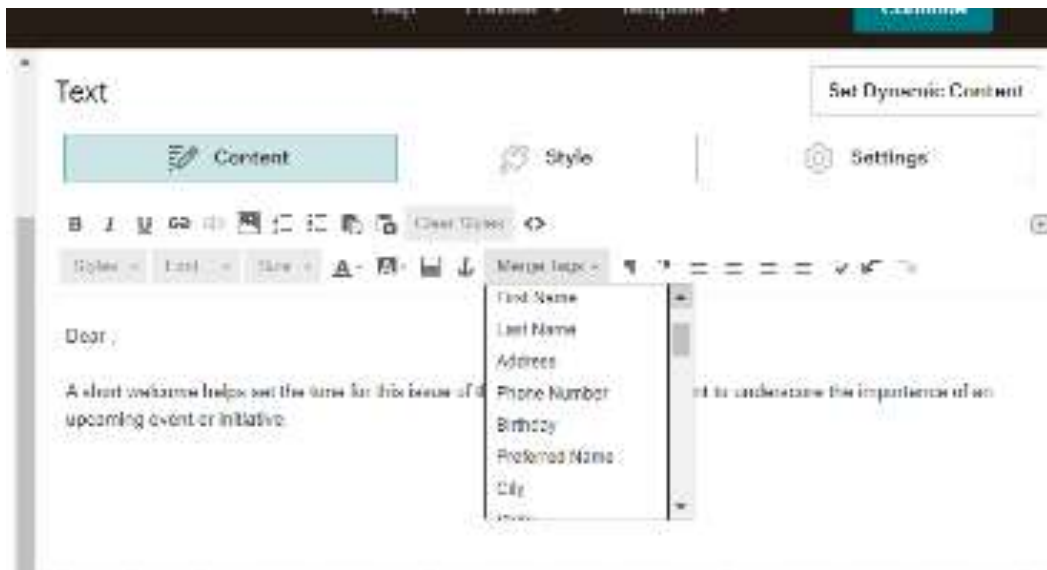


15. Now it's time for the Welcome and Intro section (a.k.a. “It's time to design your email”).



**TIP:** Clear the text in the open box by highlighting it and deleting it. If the previous text formatting remains a problem, click on the “Clear Styles” button (see above image).


16. To personalize your newsletter greeting, you may insert the “Preferred Name” merge tag \*[MMERGE6]\* into your salutation line.



**Note:** the “Preferred Name” merge tag will not appear as an option in the dropdown menu until you’ve uploaded your first list of contacts with “Preferred Name” as a column label. **SEE PAGE 24 – 31 Uploading Contacts.**


17. Continue to drag and drop the elements you want to use to create your newsletter.

[View this email in your browser](#)



Dear \*[MMERGE6]\*,

A short welcome helps set the tone for this issue of the newsletter. You may want to underscore the importance of an upcoming event or initiative.



Drop an image  
or

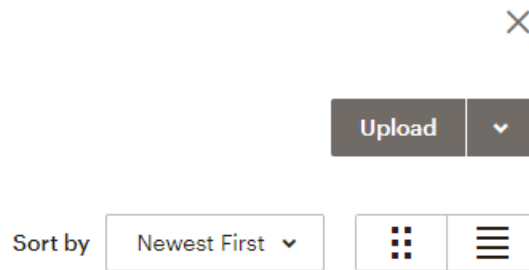
[Browse](#) [Creative Assistant](#)

The "Image + Text" box feature is an attractive way to highlight the main article of your newsletter.

18. To insert or upload an image for an image block or "Image and Text" block, click on the "Browse" button.

19. The Content Studio is opened and you will be able to upload photos and logos.

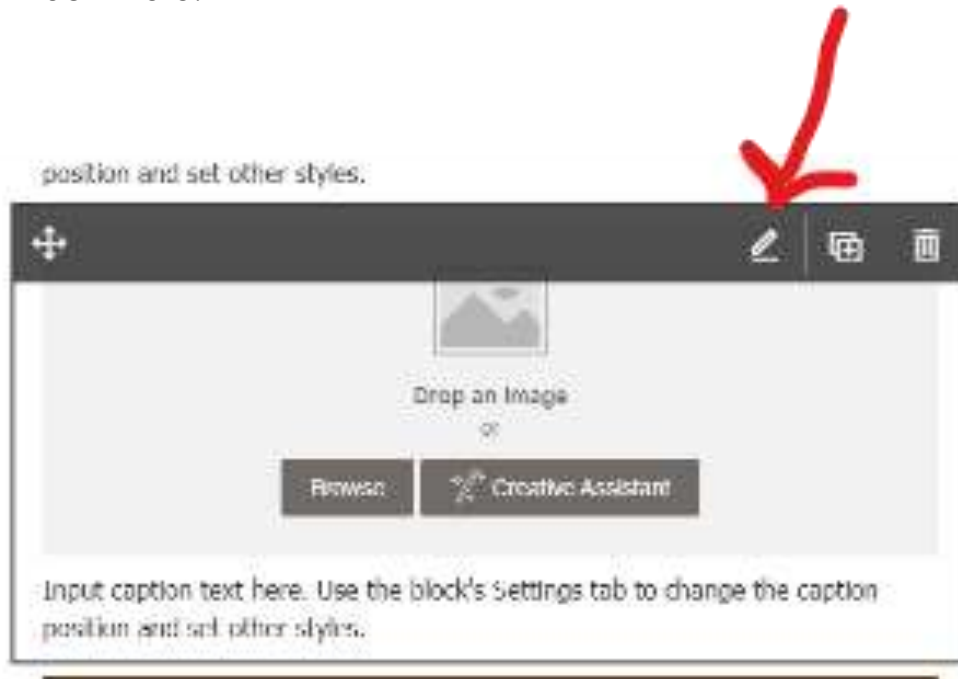
20. Choose the "Upload" button to upload a photo.



**Note:** Ideally, you will have resized your photo before uploading it.

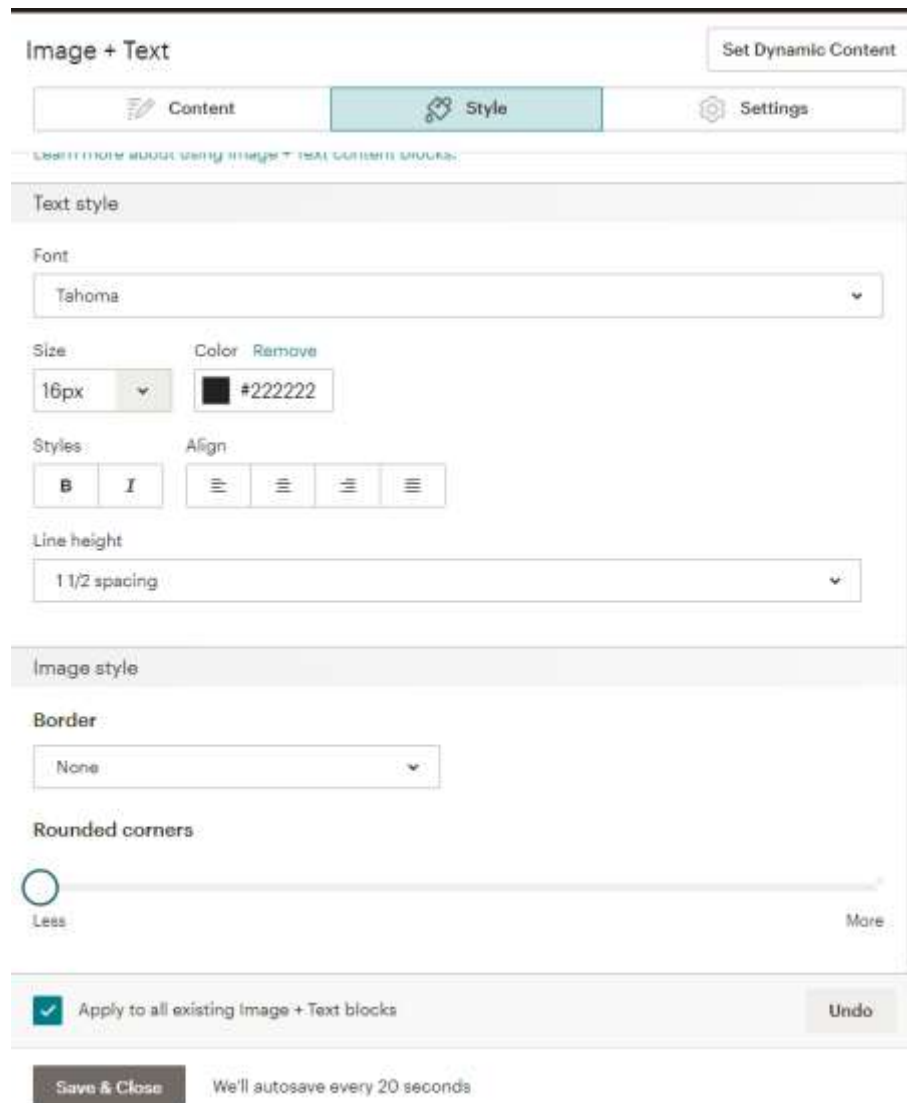
**TIP:** The IATA recommends images sized in a 3:2 ratio and 600X400 pixels. This sizing allows the email to open faster on phones and desktops.

21. Once you've dragged and dropped an element into your newsletter design area, you can hover your mouse over it until the "editing pencil" icon displays. Click on the editing pencil to upload photos, insert text, and so much more.



22. Click on the “Style” button (see blue button below) for additional font options: style, size, color, etc.

**Note:** For consistency sake, the IATA recommends the Tahoma font sized at 16px and line height 1 ½ spacing. The font color may range from #222222 to #202020. However, we recognize there may be situations where the information you are conveying may require need something else.






23. Clicking on the “Settings” button (the blue button) allows you to change the number of images, the image position, and image alignment. These settings may be altered to reflect the needs of your communication.

## Image + Text

Set Dynamic Content

 Content

 Style

 Settings

### Image + Text settings

#### Number of images

1

2

#### Image position



Left



Right



Top



Bottom

#### Image alignment



Left



Center



Right

**Note:** The example below of "Image + Text" box is a continuation of the newsletter on page 12.



Dear \*|MMERGE6|\*,

A short welcome helps set the tone for this issue of the newsletter. You may want to underscore the importance of an upcoming event or initiative.

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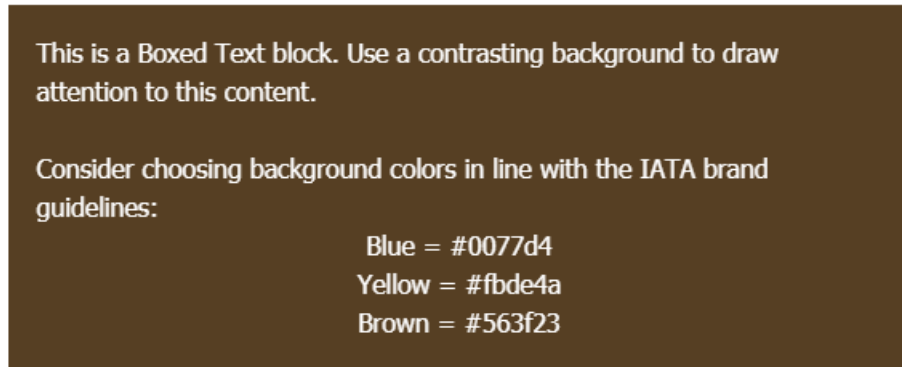
The "Image + Text" box feature is an attractive way to highlight the main article of your newsletter.

Use the block's Settings tab to change the caption position and set other styles.

Consider using the "Divider" element to help distinguish information blocks.

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24. The “Boxed Text” element is also a good way to help draw attention to certain information.



**Boxed Text** Set Dynamic Content

Content **Style** Settings

[Learn more about using Boxed Text content blocks.](#)

**Text style**

Font: Tahoma

Size: 16px | Color: #ffffff | Remove

Styles: **B** *I* | Align: [Left] [Center] [Right] [Justify] | Remove

Line height: Not specified

**Container style**

Background: #0077d4 | Remove

Border: None

Apply to all existing Boxed Text blocks Undo

25. Brand Colors:

Blue = #0077d4

Yellow = #fbde4a

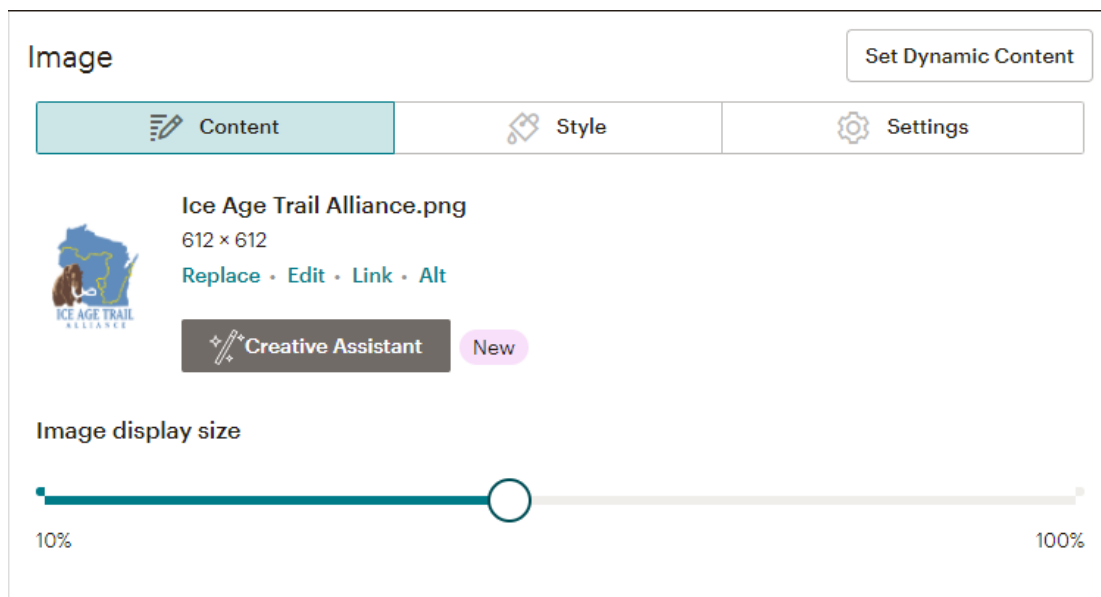
Brown = #563f23

Text colors

White = #ffffff

Black = #000000 or #202020 or #222222 (many variations on shade)

26. At the end of your email you will want to include the Ice Age Trail Alliance logo and update the social media icons with your chapter's information.



27. Hover over the social media icon element and click on the "editing pencil" and fill out the form with your chapter's information.



28. Replace the generic addresses (<http://www.facebook.com>) with the correct address to your chapter's social media account.

**Note:** Click on the Circle with an X to remove the social media options not applicable to your chapter and add the ones that are.

Social Follow Set Dynamic Content

Content Style Settings

Twitter ✕

Twitter URL or username

Link text

Facebook ✕

Facebook URL

Link text

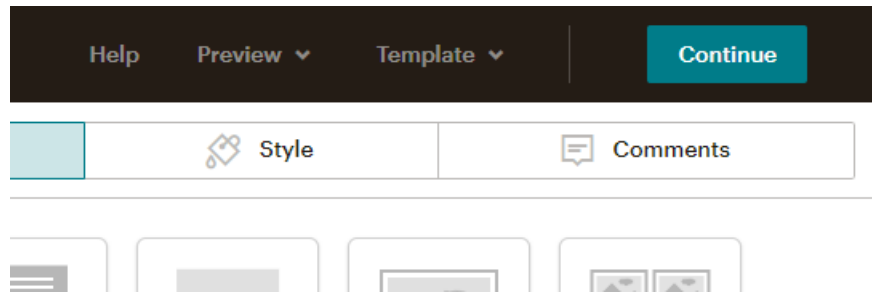
Website ✕

Page URL

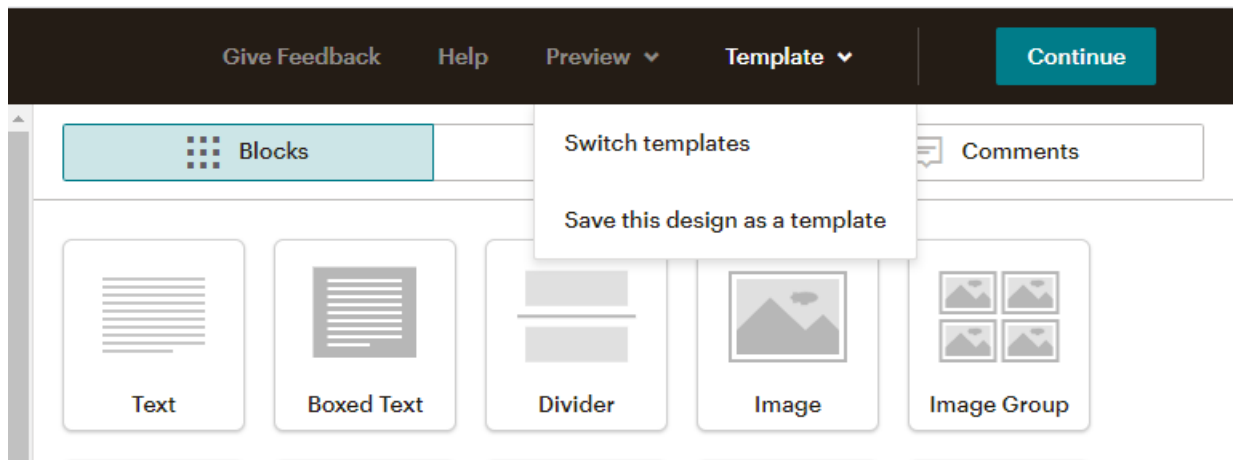
Link text

Add Another Service

29. When you're ready to SAVE (or SEND) your email, click on the "Continue" button in the upper right-hand corner:



30. To save yourself some future effort, you may save the email you created as a Template, and reuse the design again.

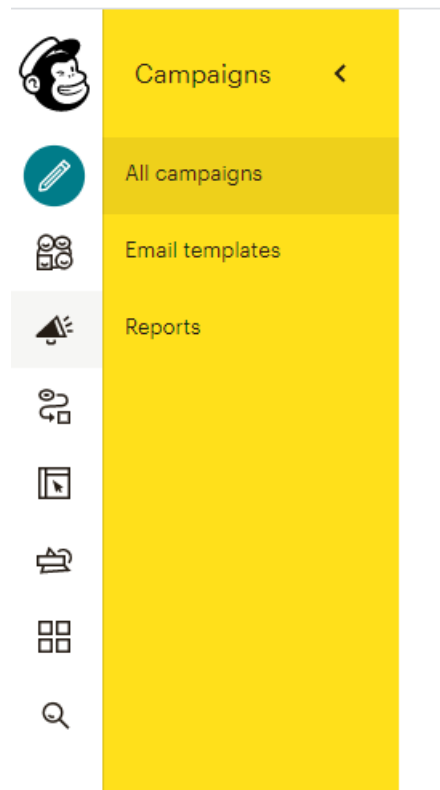


31. You may also choose to "Replicate" or copy a previously sent campaign. Select the campaign you want to copy from your list of previously sent emails. The down arrow next to the "Edit" button will offer you the option to replicate.



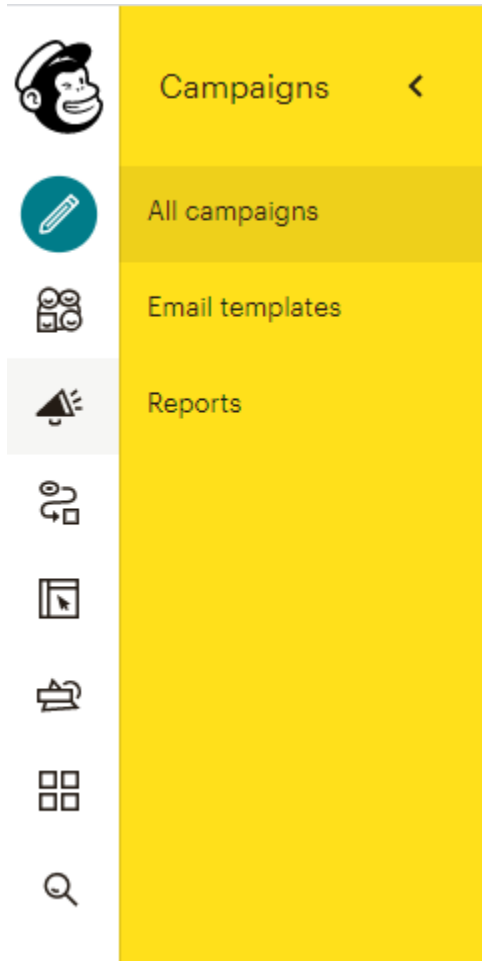
**Note:** you will need to edit the name of your campaign, update the "To", "From", "Subject", and the design of the email.

32. To create future emails, you will access your layout and design options from the dashboard.



## CREATE AN EMAIL FROM AN EXISTING ACCOUNT

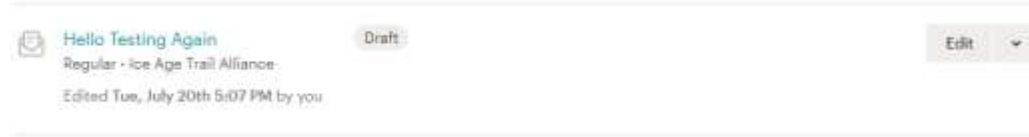
1. Log into your chapter's Mailchimp account.
2. Choose "Campaigns" (the megaphone symbol) or the "Edit pencil" to get started. (There are generally two ways to achieve the same end in Mailchimp.)



3. If you choose "Campaigns" click on the "Create Campaign" button or see #4.
4. If your chapter has an established template, you may use it (see "Email templates" in the above image).



5. Or you may choose to “Replicate” a previous campaign by choosing the down arrow next to a campaign that has a format you want to use.



**Note:** If you choose to replicate (or copy) a previously created campaign, you will want to make sure you edit the plain-text version of your new email before you send it.

6. Begin creating your new email. See pages 7 – 23 for more details on how to design your email.

**Tip:** Review these Mailchimp resources:

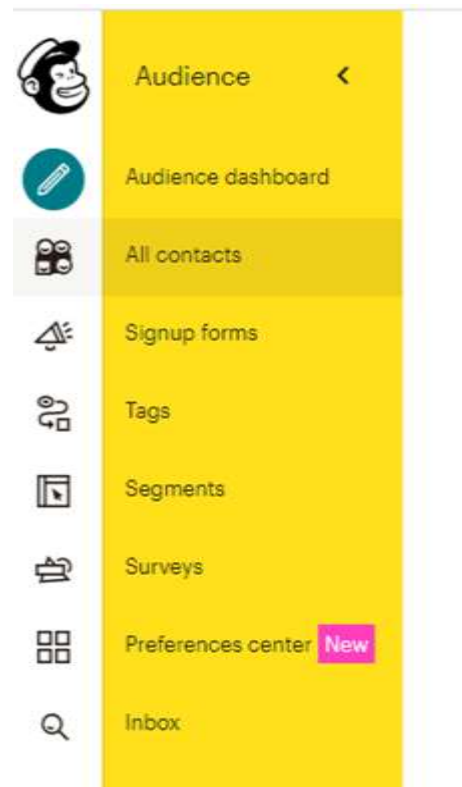
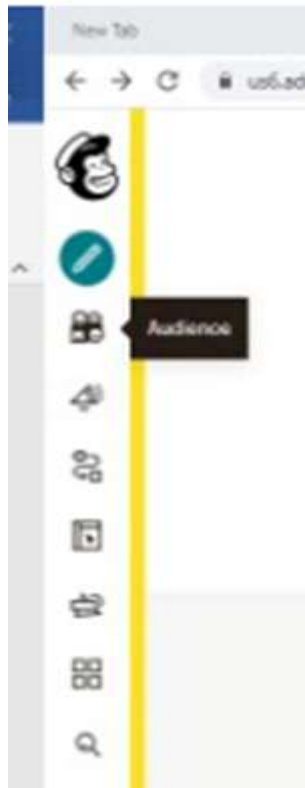
<https://mailchimp.com/help/design-an-email-classic-builder/>

<https://mailchimp.com/help/create-a-regular-email-campaign/>

## AUDIENCE (Types of Contacts):

- When using Mailchimp as a chapter, your list of contacts (or audience) is generated from your chapter's membership roster.
- You may request this list as an Excel spreadsheet from the IATA's Membership Coordinator.
- Request the spreadsheet as a CSV file.

**Note:** Access the Audience dashboard from the sidebar menu (see the grouping of four bubbles).



## IMPORTING CONTACTS

### Mailchimp Resources:

<https://mailchimp.com/help/import-contacts-mailchimp/>

Mailchimp's import tool helps you add contacts to your account.

The file import process has two parts:

1. First, you'll prepare your spreadsheet of contacts outside of Mailchimp and save it as a CSV file.
2. Second, you'll upload the information into Mailchimp.

### SPREADSHEET PREPARATION:

**Note:** We recommend your spreadsheet contain the following columns:

First Name, Last Name, Preferred Name (nicknames, etc.), Address, City, State, and Zip code (and the optional tag "Member" would populate column "I" with "Tag" as the heading).

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Preferred Name	email	Address	City	State	Zipcode	
2	Jane	Doe	Janey	<a href="mailto:janey1@yahoo.com">janey1@yahoo.com</a>	2110 Main Street	Cross Plains	WI	53528	
3	John	Doe	Johnnie	<a href="mailto:johnniebgood@yahoo.com">johnniebgood@yahoo.com</a>	2110 Main Street	Cross Plains	WI	53528	
4	Karla	Schmarla	Karla	<a href="mailto:karlawithak@gmail.com">karlawithak@gmail.com</a>	2111 Main Street	Cross Plains	WI	53528	
5	Joeseeph	Jeffery	Joe-Joe	<a href="mailto:manwith2firstnames@gmail.com">manwith2firstnames@gmail.com</a>	2111 Main Street	Cross Plains	WI	53528	
6									
7									

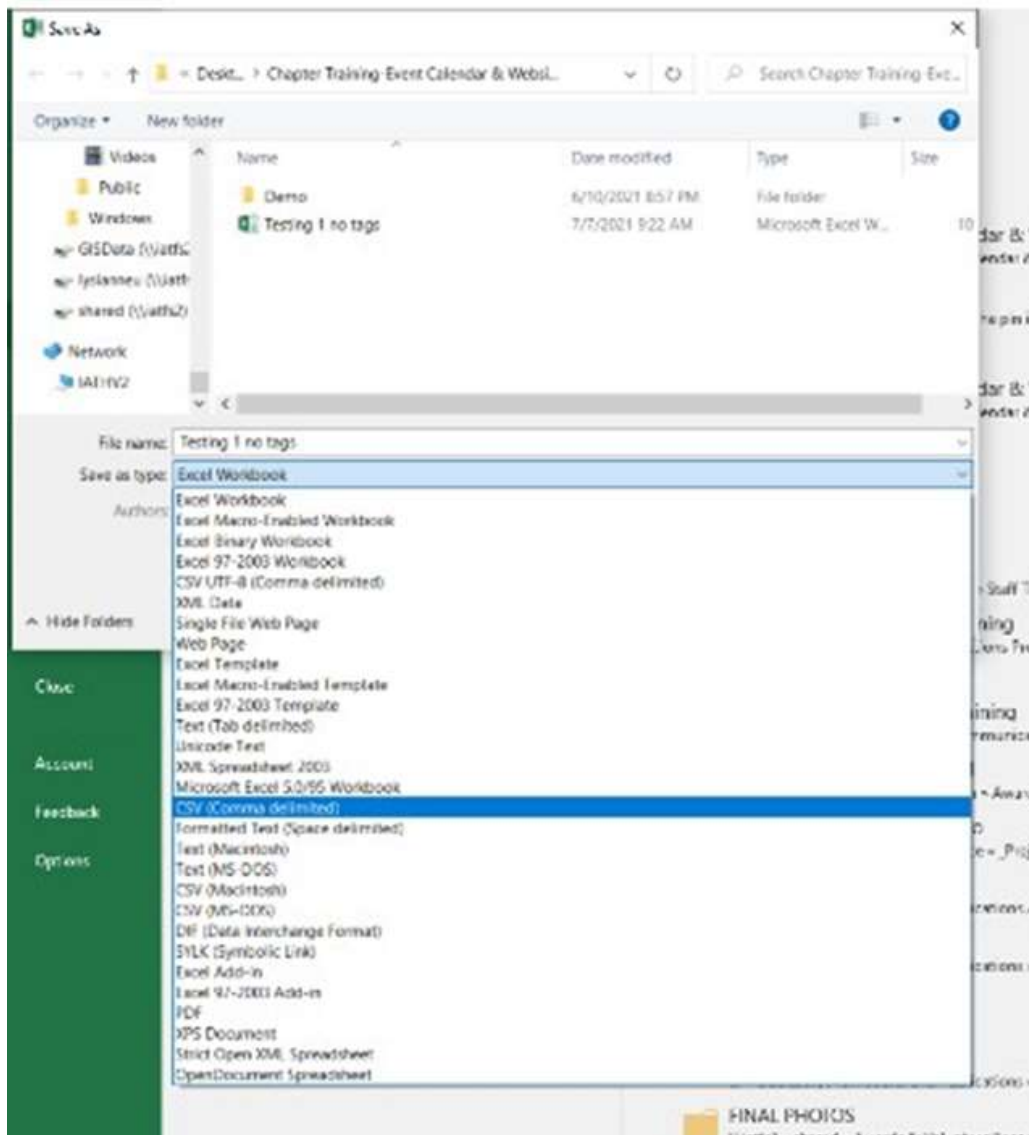
### SAVING SPREADSHEET AS A CSV FILE:

If you haven't saved your chapter membership list (Excel spreadsheet) as a CSV file, you will want to do that before you choose the upload your contact list.

To save your spreadsheet as a CSV:

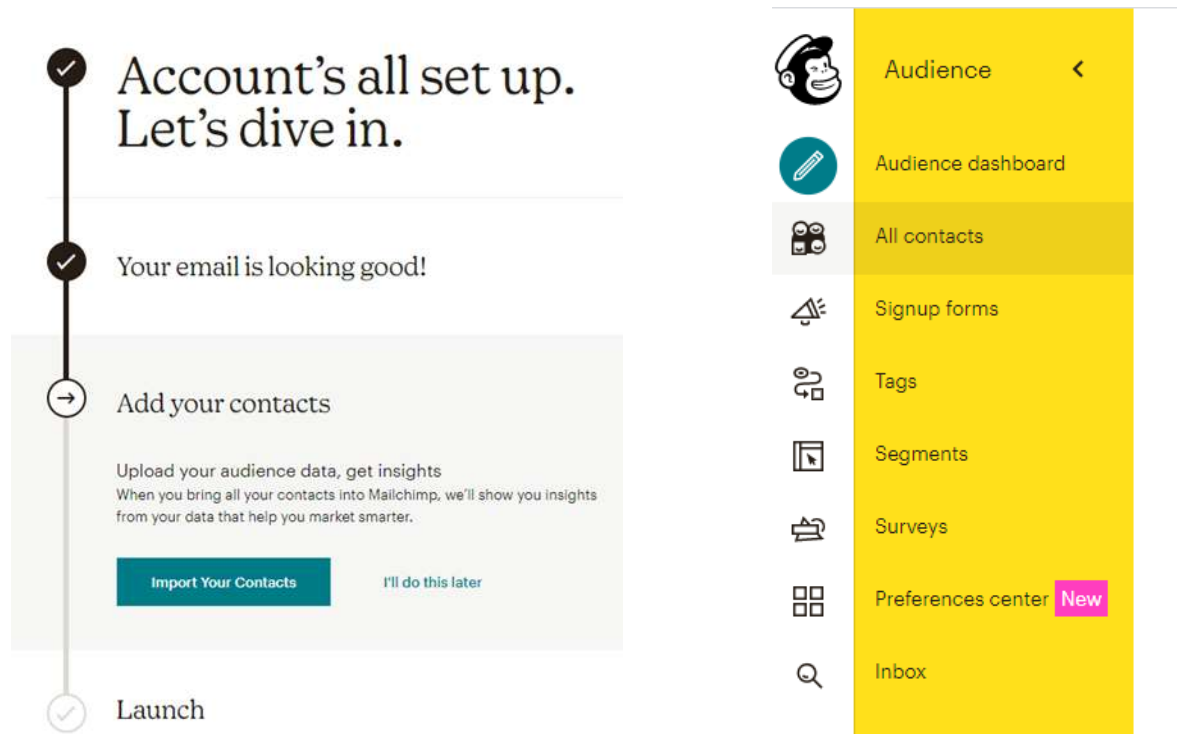
- a. Open the spreadsheet and click on "File"

- b. Choose "Save As" and choose the folder you were working in or use the "Browse" feature on your computer to help it know where to save the Excel file (which will become a CSV file).
- c. Then, once the location window opens up, you may want to rename your spreadsheet adding "CSV" to the end of the file name so you can find it later, otherwise just click on the dropdown arrow under "Save as type" which gives you two CSV options.
- d. Choose the one that reads "CSV (Comma delimited)".



## UPLOAD SPREADSHEET:

8. If you are setting up your account for the first time, then, the when and how of adding (uploading) your contacts (and access this information) could look one of two ways:



From here you will be directed to “Add Contacts” or “Import Your Contacts”.

9. You will arrive at a screen that looks like this:

## How would you like to import your contacts?

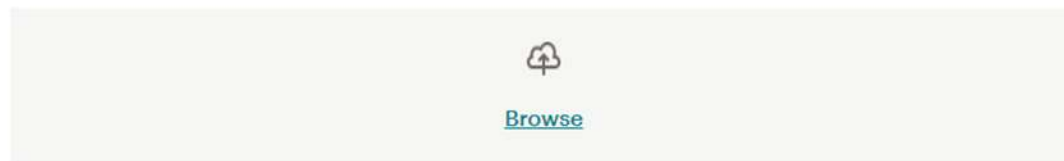
Not sure how to format your file? [Learn how](#)

- Upload file  
Upload a CSV or tab-delimited TXT file.
- Copy and paste  
Copy and paste contacts from a spreadsheet.

Continue to Upload

10. Choose to upload a CSV file and click on the “Continue to Upload” button and you’ll see this screen:

## Upload your contacts



Continue to Organize

11. Click on “Browse” and locate the CSV spreadsheet on your computer. Once the name of the spreadsheet shows up in the box (where the “Browse” is located), then you can click on the “Continue to Organize” button.

12. Choose "Subscribed" from the dropdown menu and check the "Update any existing contacts" box and click on the "Continue to Tag" button which will take you to the screen below.

**Note:** Learn more about tagging:

<https://mailchimp.com/help/getting-started-tags/>

<https://mailchimp.com/help/send-tags/>

## Organize your contacts

Select a status

Subscribed ▼

When you choose the "Subscribed" status for your contacts, it indicates that you've gained permission to market to them. Learn more about the [Importance of Permission](#).

- Update any existing contacts**  
If any imported contacts are already in your audience, we'll automatically replace their information with the data from your import. This option may make the import process take longer.

**Continue to Tag**

- Type "Member" in the box to properly tag your contacts and click on the "Continue to Match" button.

## Tag your contacts

Easily organize your contacts using simple words or phrases that make the most sense to you.

Search for or create tags Choose from popular tags

Member  Customer 2021 Staff Influencer

Start typing to add a custom tag

[Continue To Match](#)

- You will need to make sure all the column labels you have in your spreadsheet are recognized by Mailchimp. In the example below, the "Preferred Name" column needs tweaking.

## Match column labels to contact information

4 contacts were recognized in this file

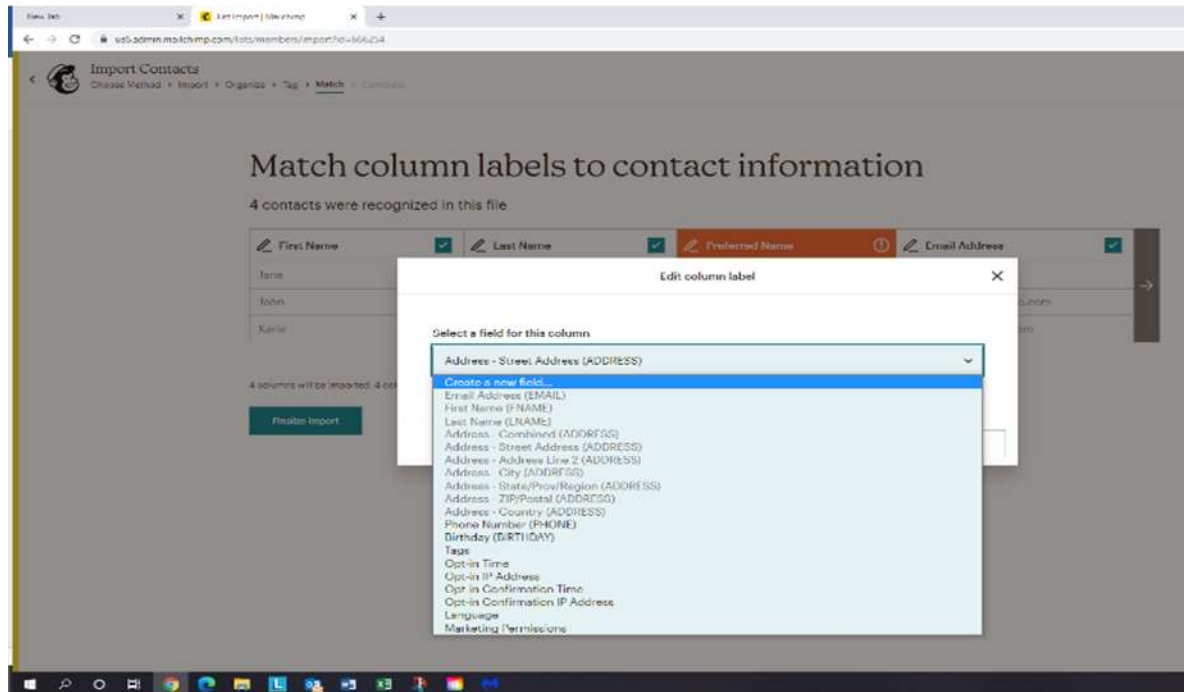
First Name <input checked="" type="checkbox"/>	Last Name <input checked="" type="checkbox"/>	Preferred Name <input type="checkbox"/>	Email Address <input checked="" type="checkbox"/>
Jane	Doe	Janey	janey1@yahoo.com
John	Doe	Johnnie	johnniebgood@yahoo.com
Karla	Schmarla	Karla	karlawithak@gmail.com

4 columns will be imported. 4 columns will not be imported.

[Finalize Import](#)



15. Hover over the “editing pencil” icon and click in the bright orange box. An “Edit column label” box will pop up. Select the down arrow next to the “Address – Street Address (ADDRESS)” line. Choose “Create a new field”.



16. The following box will pop up:

The image shows a dialog box titled "Edit column label" with a close button (X) in the top right corner. The dialog contains three main sections:

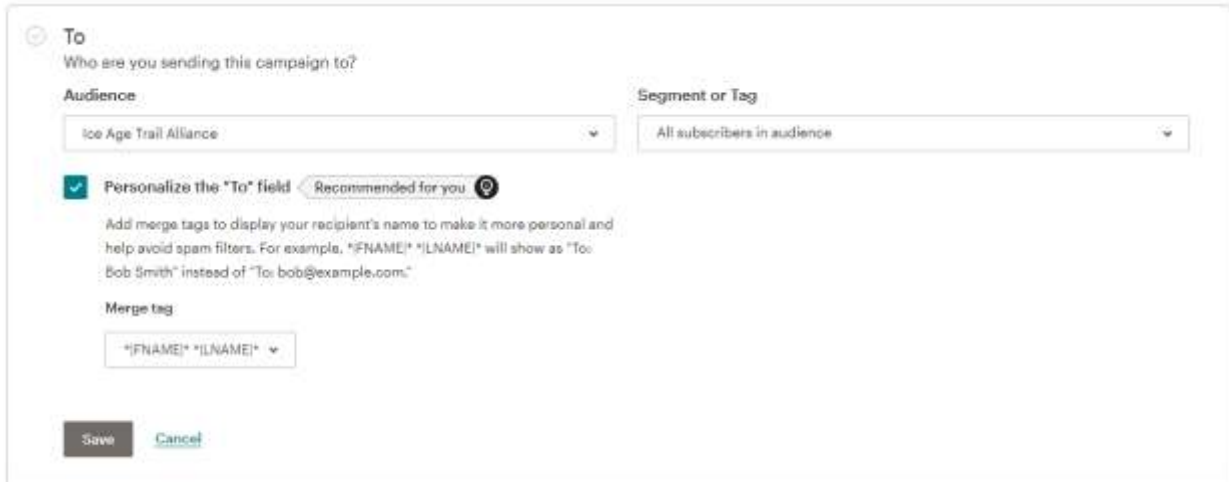
- Select a field for this column:** A dropdown menu with the text "Create a new field..." and a downward arrow.
- Create a field label:** A text input field with a "Required" label to its right.
- Select a data type:** A dropdown menu with the text "Text" and a downward arrow.

At the bottom right of the dialog, there are two buttons: a teal "Confirm" button and a white "Cancel" button with a teal border.

17. Type "Preferred Name" into the "Create a field label" box. Click the "Confirm" button.
18. REPEAT the above steps with all the columns whose labels do not match.
19. Click "Complete Import" button as your last step.
20. You may be invited to start a "Campaign" (or email).

## SENDING EMAIL

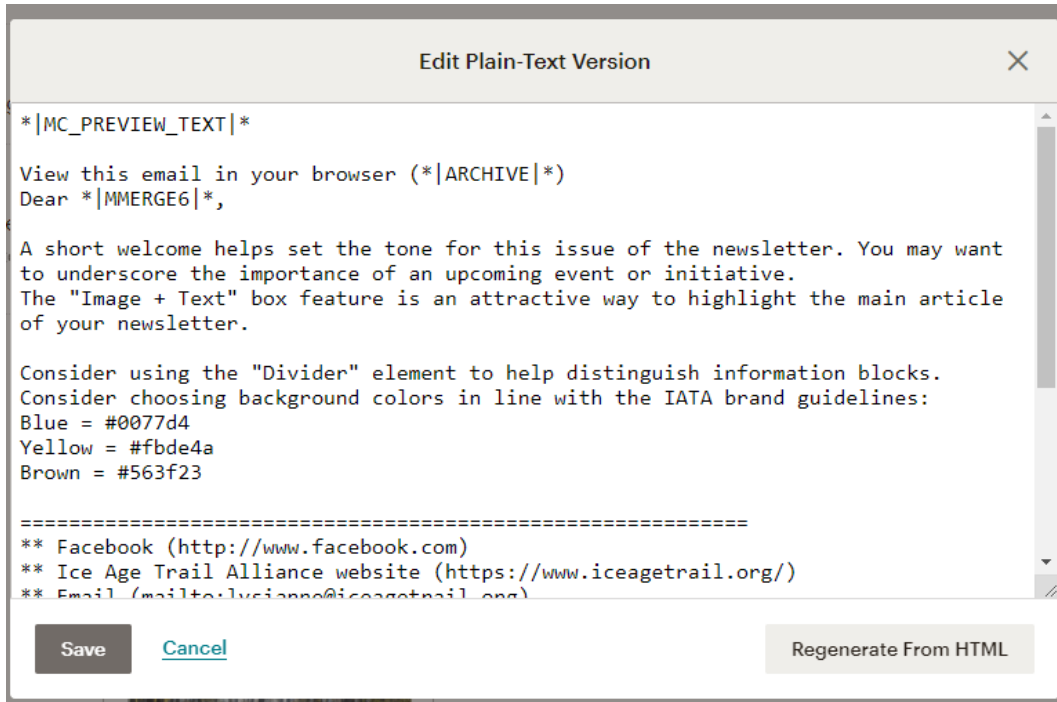
1. Complete (or edit as appropriate) the “To” and “From” fields.
2. You will want to check the “Personalize the “To” field” box and add the correct merge tags, as suggested below.
3. You will want to choose the correct Segment (All subscribers in audience) or Tag (Members, or any other tag you assigned audience members).



The screenshot shows a configuration window for an email campaign. At the top, it asks "Who are you sending this campaign to?". Below this, there are two dropdown menus: "Audience" (set to "Ice Age Trail Alliance") and "Segment or Tag" (set to "All subscribers in audience"). A checkbox labeled "Personalize the 'To' field" is checked, with a note "Recommended for you" and a help icon. Below the checkbox, there is explanatory text: "Add merge tags to display your recipient's name to make it more personal and help avoid spam filters. For example, \*{FNAME}\* \*{LNAME}\* will show as 'To: Bob Smith' instead of 'To: bob@example.com.'" Underneath, there is a "Merge tag" dropdown menu currently showing "\*{FNAME}\* \*{LNAME}\*". At the bottom left, there are "Save" and "Cancel" buttons.

4. Fill in or update the Subject.

5. Make sure you've edited the plain-text version of your email. When you click on the option to "edit". This opens up the screen you see below. Choose "Regenerate From HTML". This action synchs the HTML code with the visual version you've just created.



6. You may choose to send immediately. (The option to schedule an email requires an upgrade from the free account.)