

Mail Chimp Basics

Mail Chimp is a web-based application that allows you to create newsletters and send them to others via email. While there are higher-level versions of Mail Chimp, the basic application is free.

Note that this software is not officially supported by UW-Eau Claire Learning and Technology Services, so the availability of assistance with this program is limited.

This page contains information on the following tasks in Mail Chimp:

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Glossary

Below are some basic terms you will need to know when using Mail Chimp.

- **Campaign:** an email sent to a list of email addresses through your Mail Chimp account
- **Dashboard:** this is your “home page” and the first screen you see when you log into Mail Chimp
- **Draft:** this is a newsletter that is in progress—you can save a newsletter as a draft and continue to work on it later

- **Group:** segments of a list that are often based on interest
- **List:** a number of email addresses for subscribers; the people to whom you are emailing the newsletter
- **Reports:** information and stats compiled by Mail Chimp for each of your campaigns (includes number of opens, clicks, etc.)
- **Template:** a model predesigned by Mail Chimp that you may use in creating your campaign that generally has established designs, colors, fonts, and layouts to get you started.

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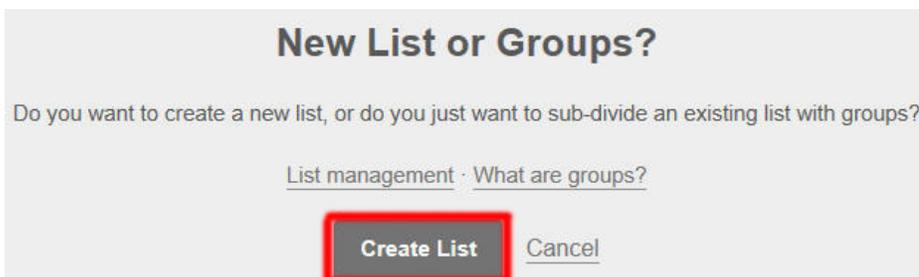
Create a List

A good starting place is to create a **List** for your campaign, which includes the email addresses for individuals to whom you want to send your campaign. Before starting your campaign you must create a list, so this is a logical starting point.

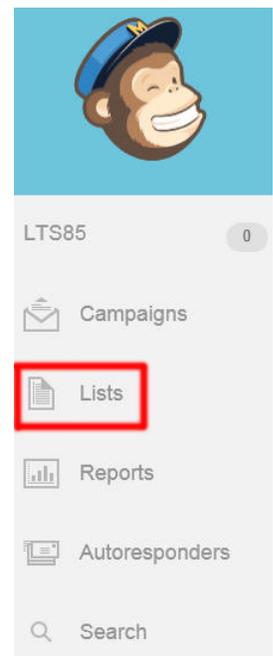
1. Click **Lists** in the panel on the left-hand side of the screen.
2. Click the **Create List** button on the top right of the screen.



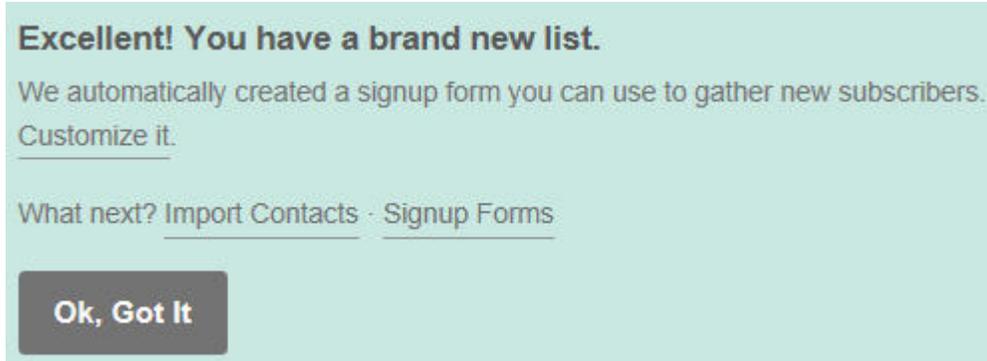
3. Click **Create List** in the middle of the screen to continue.



4. You will be directed to the *Set Up Your New List* screen. Fill out the necessary fields (fields are required unless indicated to be optional). As you click in the text box for each field, more information defining that field will appear.

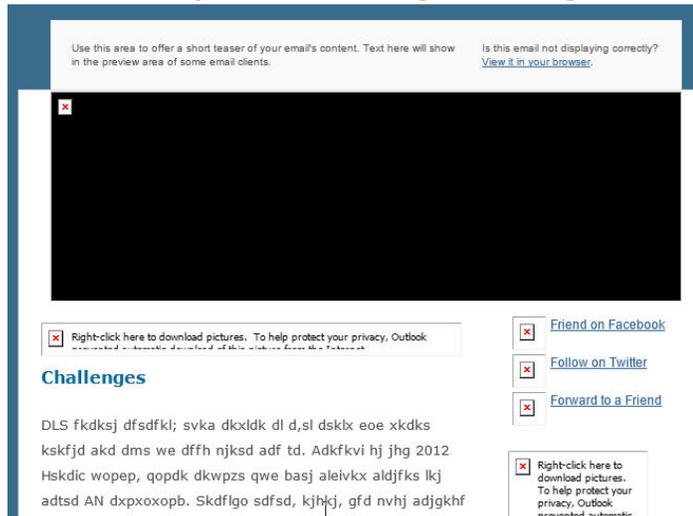


5. Once you are ready, click **Save**.
6. A screen will appear confirming that your list was created. Click **Import Contacts** to add contacts to the list (or choose **Ok, Got It** if you wish to add contacts later).

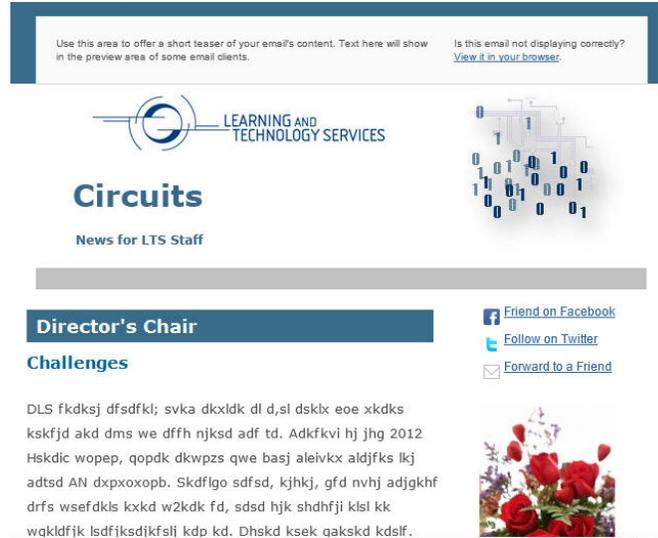


Importing Contacts to a List

1. From the *Import* dropdown menu, click **Start New Import**.
2. **Important Note:** If you wish, import files from your computer by clicking one of the options in the *Import from my computer* section. **However, if you are sending newsletters to other UW-Eau Claire campus members, it's important to note that you may run into a few problems sending campaigns using this method. When sending to UW-Eau Claire email addresses (note that other email domains may not have this issue), images are automatically blocked, looking something like this:**



While people can right click on an image and select *Download Pictures* to make the images appear, it may give viewers a poor first impression of your newsletter. Therefore, the documentation continued below offers an alternative for UW-Eau Claire viewers that allows your newsletter to be sent to users with visible pictures:



3. Instead of importing a list of contacts, add only one contact—*your* email address. Click the **Add Subscriber** icon, found to the far right of the list name. 
4. On this screen, you can subscribe one person at a time. Type your email address into the appropriate box, and add your name if desired.
5. Check the checkbox next to **This person has given me permission to add him/her to my MailChimp list.**
6. Click **Subscribe.**
7. You will be directed to a screen showing that your email address was added successfully.

Why did we only add *your* email address to the list? Now, when you send out your campaign, only *you* will receive the campaign. You will then be able to download the images and forward the campaign from your email to a list of users. Your newsletter will look more impressive and give viewers a better first impression. For more information on this process, see [Send a Campaign](#). For more information on the downsides of sending a campaign in this manner, view [Analyzing Reports](#).

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Create a Campaign

Below is information describing the different options for creating a campaign using Mail Chimp templates.

1. Click **Campaigns** in the panel on the left-hand side of the screen.
2. Click the arrow next to **Create Campaign** on the top right corner of the screen and select **Regular Ol' Campaign** from the dropdown menu.
3. First you must select the list to which you would like to send your campaign. Select the appropriate list, and click **Next** at the bottom of the screen.

Note: At the bottom of the screen, you will a progress bar showing where you are in the creation process and what you have left to complete:



4. On the *Setup* page, fill in the appropriate details for your campaign. As you click in each text box, more details will appear regarding the field.

Note: *Email Subject* and *From Name* are especially important, as they will appear prominently in your contacts' inboxes.

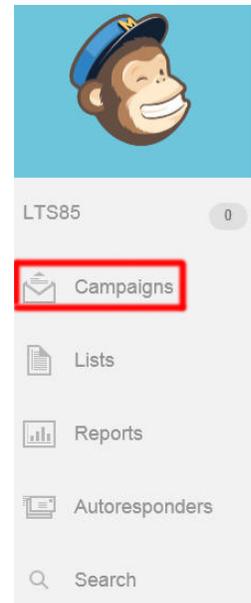
5. When you are finished, click **Next** at the bottom of the screen. Choose the desired template option from the screen that appears. For more information on these options, see the *Templates* section below.

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Templates

Below are brief overviews on the template choices offered, followed by more in-depth documentation regarding the Drag & Drop Editor, which is the recommended option.

- **Drag & Drop Editor:** Mail Chimp's new editor that allows you to create mobile-friendly emails. Once you enter the editor, you will pick from the basic templates described below to get started.
- **Basic:** Simple layouts ready for your design and content that focus on the number of columns, size of columns, etc.





- **Predesigned:** Templates ready for your content that are designed for a specific theme. These can make your newsletter look more professional, but they can also be very hard to change to fit to your topic. They are very helpful for getting ideas.



- **My Templates:** Templates you've designed and saved for later use. If you use a template that you like, you can save it to your templates to use in the future. If you have a newsletter that will look quite similar each time you use it, you can save it to your templates for repeated use.

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Drag and Drop Editor

This section describes how to create a campaign using the *Drag & Drop* editor, Mail Chimp's new editor, which is the recommended option.

Get Started (Choose a Template)

1. From the *Pick a Template* page, click **Select** below the **Drag & Drop Editor** option.



Drag & Drop Editor

Create beautiful, mobile-friendly emails with our new editor

Select

2. You will now see your editing screen. First, you must choose a template. Click **Basic Templates** in the panel on the right-hand side of the screen.
3. You will be provided with a list of basic templates to choose from that vary in the number of columns. To preview a template, click **Preview** next to the option you wish to preview.



You will get an idea of what the template looks like, both on a computer screen and a mobile device. To exit *Layout Preview* mode, click  near the upper right corner of the screen.

Note: If you don't see exactly what you are looking for, pick the closest option you can find—these templates are editable, and can be changed to fit your needs.

4. Once you have chosen a template, click **Select** next to the desired option. Your template will be loaded, and you can add content as desired.

Note: If you wish to temporarily cease work on a campaign, click **Save and Exit** in the upper right-hand corner of your screen. From the dropdown menu, select the screen you wish to be directed to upon exiting.

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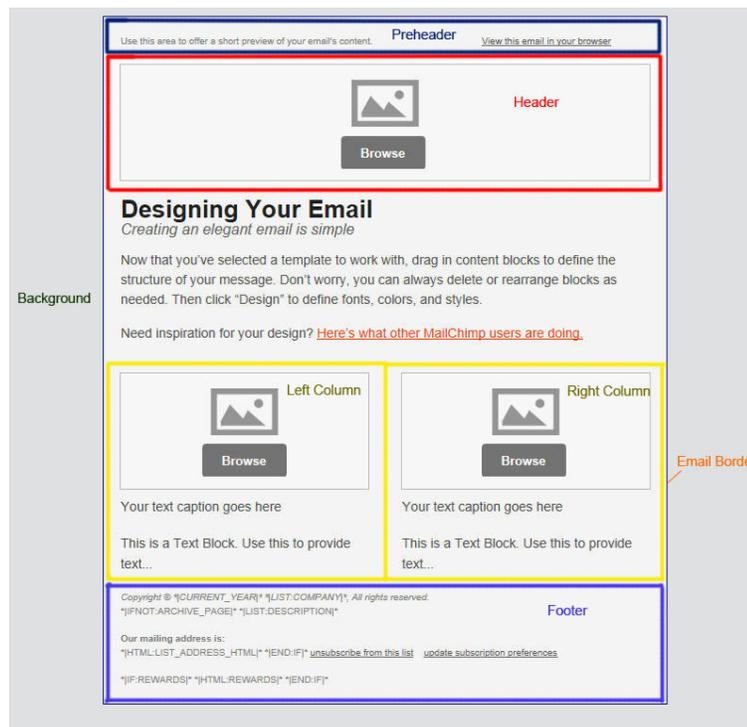
Understand the Workspace

1. On the right side of the screen, you will see an editing pane with four tabs:
 - a. **Layout:** Come back to this tab if you wish to change the layout, but note that if you have already added content it may become out of order.
 - b. **Content:** This is where you will see all the content elements you have the option to add to your newsletter. Hover over the thumbnail of an element to read a short description.
 - c. **Design:** Here you can make design choices regarding text, colors, etc., which ensure consistency throughout your newsletter. Note that you must click **Save** near the bottom of the panel for each section in which

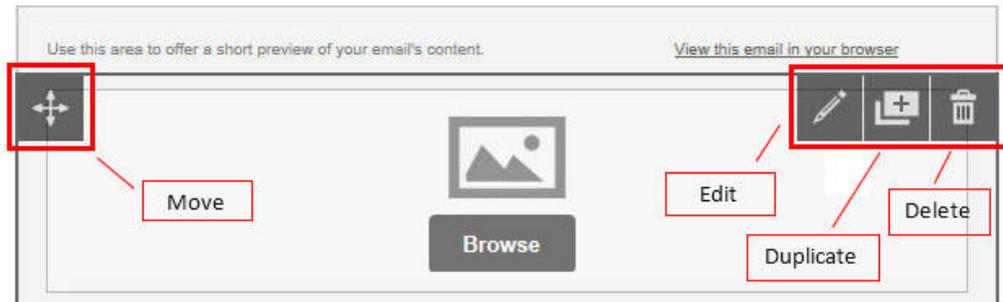
you make changes. You may not need to choose design settings for everything, but some important elements you may wish to choose settings for are listed below:

- i. **Background:** This is the area surrounding your email. You can change the background color in the *Page* section.
- ii. **Headings:** Throughout your newsletter, you may use different headings to make titles stand out. You can change the font family, color, size, alignment, etc. in the *Page* section.
- iii. **Body Text:** This is the main “paragraph text” of your newsletter. You may change the font family, color, size, alignment, etc. in the *Body* section.
- iv. **Links:** It is common to have text hyperlinked to an outside url. To edit what linked text looks like (color, weight, underline), go to the section in which the link can be found (e.g. the settings for linked text found in the body of your newsletter can be found in the *Body* section; settings for linked text in the footer can be found in the *Footer* section).

2. Use the diagram below to understand the names of different sections of a template. Note that the number of columns will vary depending on the template you chose.



3. In the main body of the page, you will see your chosen template. Note that any time you hover over an element of this template, whether it be an image, text box, etc., you will get the same options that allow you to change the template and content as you wish. For more information on these tools, view the **Edit Content** section.



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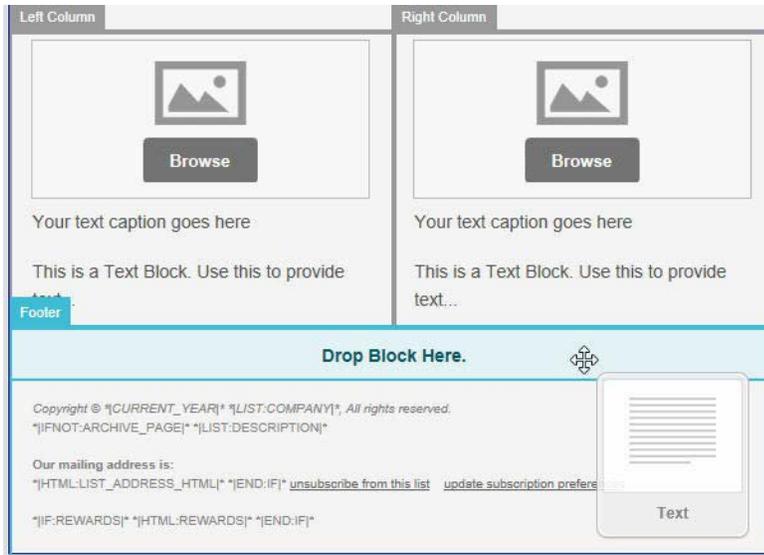
Add Content

1. In the panel on the right-hand side, click the **Content** tab.



You will see a list of all the content elements you can add to your newsletter. Hover over the thumbnail of an element to read a short description.

2. Remember that this is a “drag and drop” editor, created to simplify editing. From the panel on the right, *click and drag* the desired element over to your newsletter. Note the **Drop Box Here** area that appears—when you let go of the element, this is where it will appear in your newsletter.



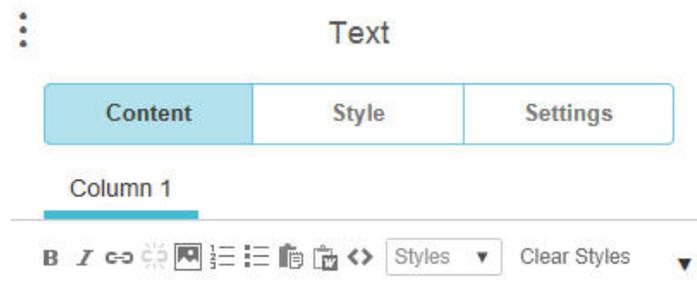
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Edit Content

Text Element

1. Hover over a content element and click the edit pencil icon in the top right of the element (or simply click the element).
2. You will see a text editor similar to other applications you may have used. Delete the default text and insert your own text.

Note: You will see a variety of tools above the text entry pane. To expand the toolbar and view *all* tools, click the dropdown arrow on the far right of the edit pane: ▼



Designing Your Email

3. Once you are finished editing an element, click the **Save and Close** button at the bottom of the pane.

A rectangular button with a dark grey background and the text "Save & Close" in white, centered.

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Image Element

1. Click **Browse** directly in the element itself. You have multiple options for uploading:
 - a. Click **browse for a file** to upload an image from your computer. Click **Browse**, find the desired file, and click **Open**. Then, click **Upload**.
 - b. Click **import from a URL** if you have the url for an image.
 - c. To view and use an image you have previously uploaded to Mail Chimp, click **Images** on the top left of the window.
2. In the panel on the right side of the screen, you will see options to replace, edit, link, and add alt-text to the image (in the *Content* tab).
3. Click the *Settings* tab to see align and margin options.
4. Once you are finished editing an element, click the **Save and Close** button at the bottom of the pane.

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Include a Video in a Campaign

Mail Chimp has video merge tags that allow you to create a screenshot of a video in your campaign that links to a video on YouTube (or other video-centric social sites), instead of simply linking text to a video. Below are instructions for linking to a video on YouTube.

1. The basic, general format for the video merge tags look like this:
|SERVICE:[\$vid=XXX]|

This merge tag can be typed straight into a text content type in Mail Chimp. Note that the video screenshot will not show up while you are editing in Mail Chimp. But, when you send out the newsletter it will appear, and you can also see it in

when you enter preview mode or send out a test email.

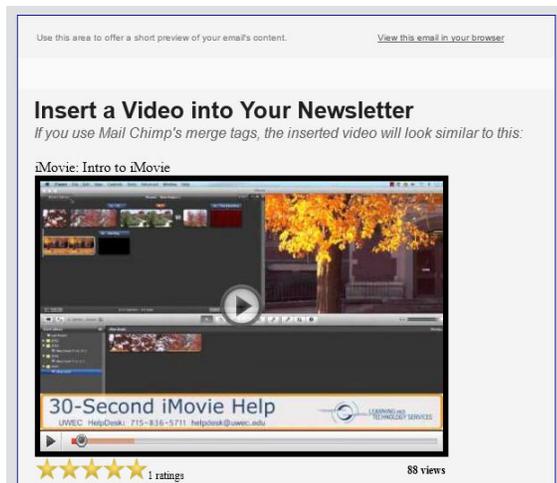
2. When linking a YouTube video, replace **SERVICE** with **YOUTUBE**.
3. Replace **XXX** with the ID at the end of the URL, which is anything that falls after the equal sign.

Example: You would use **s69lbPfwK8** for a video with the URL
<http://www.youtube.com/watch?v=s69lbPfwK8>

4. Entered in a text content type in Mail Chimp, your merge tag will look something like this:

*** |YOUTUBE:[\$vid=s69lbPfwK8] | ***

In your newsletter, the end product will look something like this:



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Preview and Test

It is helpful to be able to preview and test your newsletter before sending it out. There are multiple methods for accomplishing this:

While in the editing view, click **Preview and Test** (found near the top right of the screen) to see the various options appear in a dropdown menu.



- Click **Enter Preview Mode** to get an idea of what your newsletter will look like, both on a computer screen and a mobile device. To exit *Preview Mode*, click  near the upper right corner of the screen.
- Click **Send a Test Email** if you wish to send a test email to see what users will receive. A window will appear; enter the desired email in the text box (if you wish to send to multiple people, separate email addresses by a comma). Click **Send Test**. It will take several minutes for the test email to reach your email inbox.
- Click **Push to MailChimp Mobile** if you have installed the MailChimp mobile app and wish to preview your campaign on that device.

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Send a Campaign

Once you have finished designing your newsletter, you can move on to the confirmation and distribution process.

1. Click **Next** at the bottom of the screen. On this page you may, if you wish, insert text that will be displayed if recipients aren't able to view your HTML email (for example, if it is caught in spam filters).
2. Click **Next** at the bottom of the screen.
3. On this page you will confirm the settings you have set up for your campaign. If you wish to edit any of the settings, click the **Edit** button to the right of the element you wish to edit.

Note: If you missed any necessary settings as you set up your campaign, the element will be shaded red and will say **Resolve** instead of **Edit**.

Note: You may preview and/or send a test email from this screen as well (this option is found at the top right of the screen).

4. Once you are satisfied with the settings, look to the bottom right of the page to view the options listed there.
 - a. If you wish to send your campaign immediately, click **Send Now**. A window will appear, providing the title of the list you are sending the campaign to and asking if you want to continue. If you are ready to send, click **Send Campaign**. Note that it will take several minutes for the campaign to deliver.
 - b. If you wish to send the campaign at a later date, click **Schedule**. You will be asked to specify a date and time. Once you have done so, click **Schedule**. The campaign will be sent at the specified date and time.

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Working with In-Process and Sent Campaigns

Campaign Options

1. Click **Campaigns** in the panel on the left-hand side of the screen to view a list of your current campaigns.
2. There will be an icon to the left of each campaign, letting you know the current status of that campaign:
 - a.  = the campaign is a draft
 - b.  = the campaign is scheduled to be sent
 - c.  = the campaign has been sent
3. Each campaign has a variety of options associated with it:
 - a. Drafts will have an **Edit** option that you can select to begin editing the campaign. You may also simply click the campaign name to go to editing mode. This option will not appear if the campaign has already been distributed.

- b. Sent and scheduled campaigns, on the other hand, will have a **View Report** button to use if you wish to see the reports and statistics for your campaign.
- c. Clicking the dropdown arrow next to **Edit** or **View Report** (depending on the status of the campaign) will give you further options, as described below:
 - i. Select **View Email** (available for campaigns of any status) to view a pop-up preview of what the emailed campaign will look like.
 - ii. Click **Replicate** (available for campaigns of any status) to make an exact copy of the campaign. This may be useful if you have a serial newsletter with a consistent format; all you would have to change is the text content.
 - iii. Click **Social Share** (available for sent campaigns) to share your campaign on Twitter, Facebook, or Delicious, or to download a QR Code for the campaign.
 - iv. Click **Pause** (available for scheduled campaigns) to pause the campaign and keep it from being sent.
- d. Select the check box next to the left of a campaign name to see more options. The **Delete** and **Move to** (a folder) buttons will appear.

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Move a Campaign to a Folder

It is helpful to sort completed campaigns into folders, so your unfiled campaigns list remains uncluttered.

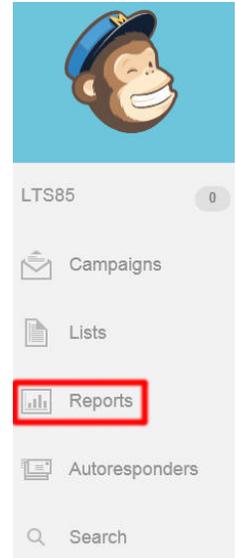
1. Click the checkbox to the left of the desired campaign's name.
2. Click the **Move To** button near the top of the screen.
3. You will see a list of existing folders you may have created. Select the desired folder from this list, or click **Add** to create a new folder for your campaign.
4. Note that at any time you can click **Folders** near the top of the screen to view all your current folders.
 - a. Click a folder name from this list at any time to view only the campaigns in that folder (the default view will be *All*).
 - b. From the *Folders* dropdown menu, click **Add** to create a new folder.

- c. From the *Folders* dropdown menu, click **Edit** to either  delete or  change the name of a folder.

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Analyzing Reports

Once you have sent a campaign, you can view the *Reports* section of Mail Chimp to see viewer data. Note that this is only helpful if you have uploaded email addresses into a list and sent the campaign to that list from Mail Chimp. If you chose to send the email to yourself and *then* forward it out to a list of individuals (in order to [ensure that images appear right away](#)), you will not have this report data.



1. Click **Reports** in the panel on the left-hand side of the screen.
2. Note that to the right of each campaign, if you click the arrow next to **View Report**, you will see further options:
 - a. **View Email:** Choose this option to view the campaign as it was emailed to your list.
 - b. **Social Share:** Click this to share your campaign on various social networking sites.
 - c. **Export to Excel:** Choose this option to export the report data directly to Excel. When you click this, choose either **Open** or **Save** from the options that appear at the bottom of the screen. Exporting to Excel will give you data strictly in a table format.
3. Click the title of the campaign for which you would like to view reports.
4. When you select a specific campaign to view, you will see charts depicting the number of opens/unopened campaigns, clicks, unsubscribers, etc. Scroll down further to view further data.
5. To view reports for a different campaign at any time, click the arrow next to **Reports** at the top of the screen, and select the desired campaign from the dropdown list.



6. Note that you also have options to download the reports to be opened in Excel, print the reports, or share the reports via email.

