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**USER GUIDE: GETTING STARTED WITH MAILCHIMP**

## CHAPTER 1. INTRODUCTION TO MAILCHIMP



### Welcome to Mailchimp!

Mailchimp is a powerful marketing automation platform that helps you share email and ad campaigns with clients, customers, and other interested parties. It's essentially a tool you can use to create and manage mailing lists and newsletters, as well as automate your email campaigns and collect leads

In this guide, you'll learn the basics of Mailchimp and how you can start using it to create effective newsletter campaigns. We'll also provide some helpful resources to use as you work.

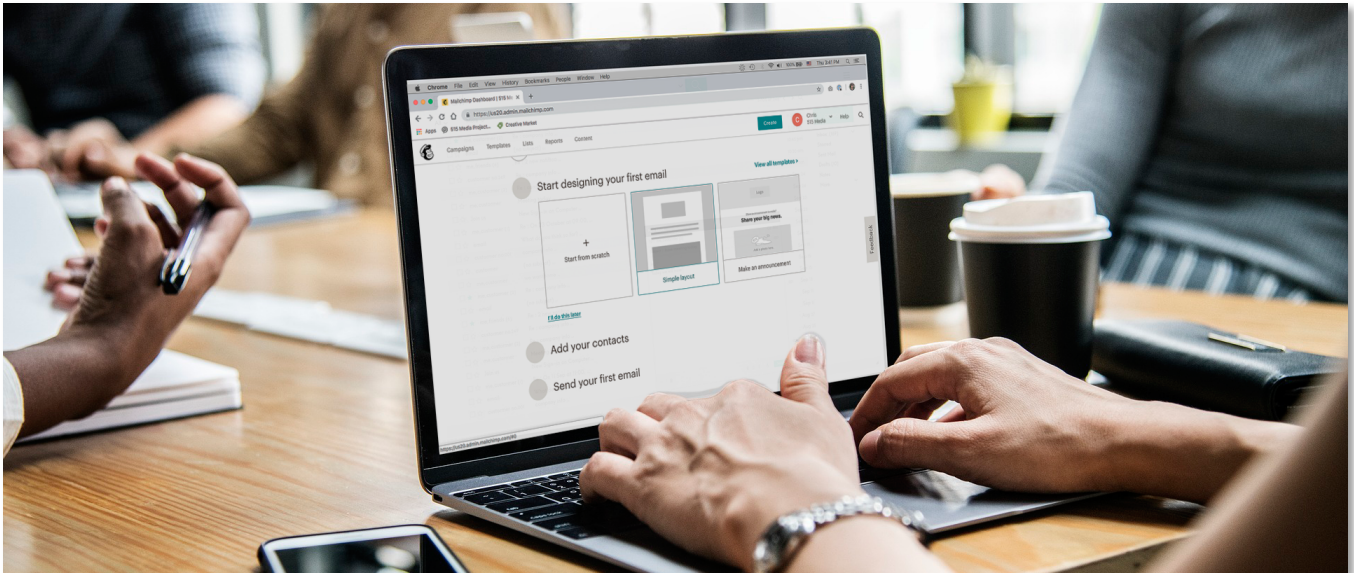
This tutorial is geared for complete beginners who are new to Mailchimp and don't have any prior experience.

### Our Mailchimp guide will cover the following:

- Overview of the Mailchimp Dashboard
- How to Manage Contacts
- How to Use Lists For Your Subscribers
- How to Use the Newsletter Editor
- Adding Content to Your Campaigns
- Creating and Sending Campaigns
- How to Generate Reports



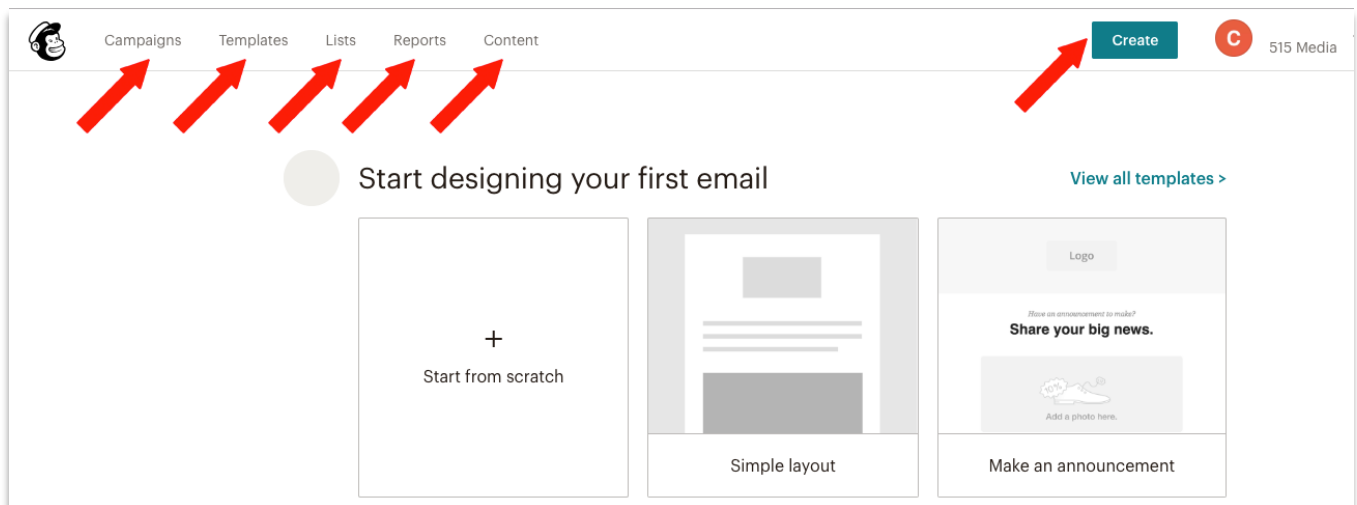
## CHAPTER 2. THE MAILCHIMP DASHBOARD



### Getting to Know the Mailchimp Dashboard

Mailchimp makes it easy to design beautiful, personalized email campaigns and automations so you can build and strengthen your relationships with potential and existing customers. The Mailchimp Dashboard is where you will find all the necessary tools to get started.

Once you are logged into your Mailchimp account, you will arrive on the Dashboard page and see the following navigation items on the top of the page:



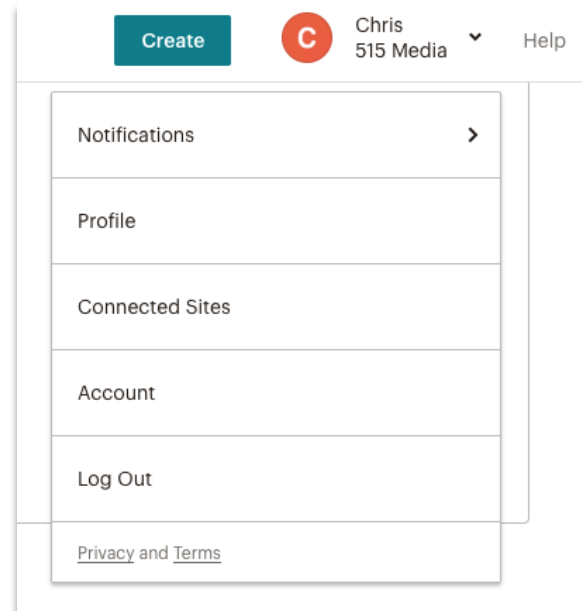
The main Navigation bar at the top of the Mailchimp Dashboard contains the following tabs:

- **Campaigns:** A Campaign is the email message you design and send to subscribers. In this tab, you will find a list of your recent and saved Campaigns. Here you can manage your existing Campaigns and create new ones.
- **Templates:** Here is where you will find your Templates, which are preset layouts for your newsletters, that you build your Campaign on. Here you can select a saved Template to use for your new Campaign.
- **Lists:** In this section, you will be able to access and manage your contact lists. This includes your newsletter subscriber lists.
- **Reports:** Here is where you can access performance reports to view the stats of your campaigns/ads to help you track your growth, engagement, and revenue.
- **Content:** Here is where you will find the Content Manager which houses all of your uploaded media (images, files, etc)

In the main content area of the Dashboard, you will also find additional tools to get you started with your new Campaign.

**Create Button:** On the right side of the Navigation area, you will see a "Create" button. This is simply a shortcut for creating a new Campaign.

**Account Tab:** To the right of the Create button, you will find your account name and a dropdown tab, which lists your pages related to general Account Management. Here you can access and update your Profile info, check your Notifications, manage your Account Settings, Connected Sites, and more...



## CHAPTER 3. MANAGING CONTACTS



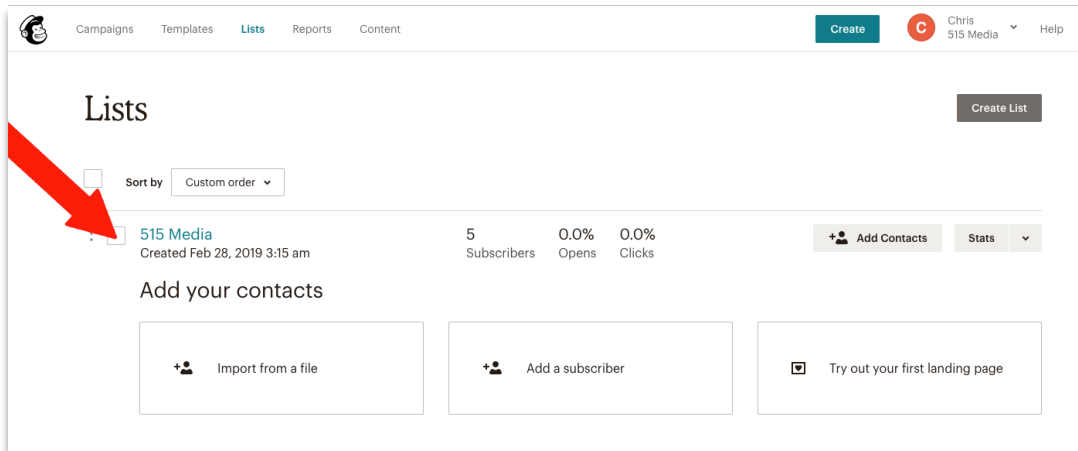
### Contact Management

Mailchimp makes it easy to manage your contacts and subscriber lists. Here you will learn where contacts go once they subscribe to your mailing lists from your website, and how to edit / manage and remove contacts, plus what contacts can do to manage their own subscription preferences, like unsubscribing.

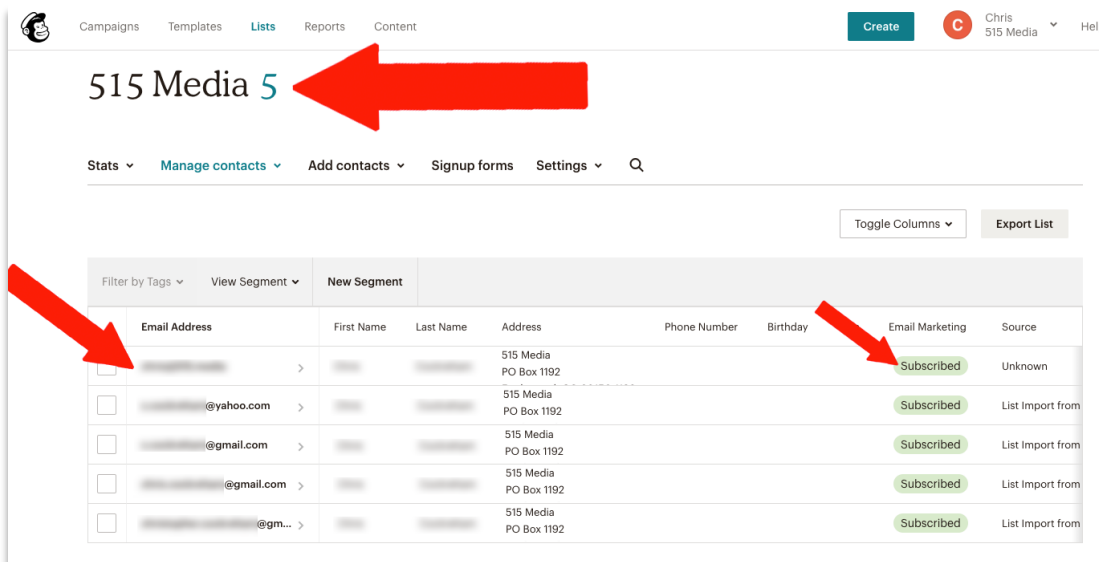
#### NEW SUBSCRIBER CONTACTS

When a new subscriber signs up to your mailing list via the Signup form on your website, they will be automatically added to the corresponding Subscriber List in your Mailchimp account.

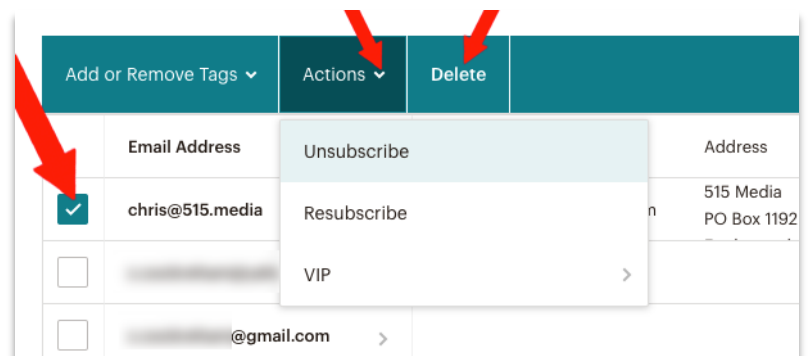
To access your Subscriber Lists to view your new contacts, please click on the **Lists** tab in the Dashboard Nav Menu. This will take you to the **Lists** page, where you will see your current List/s (if you have multiple) displayed. Each List entry will display the number of subscribers along with some basic stats on Opens and Clicks percentages. (see image on next page)



To view the full list of subscribers for a specific list, please click on the desired List title. This will open a new page displaying all of the current subscribers to that list. For example, you will be able to see the email addresses, names and subscription status for each subscriber.



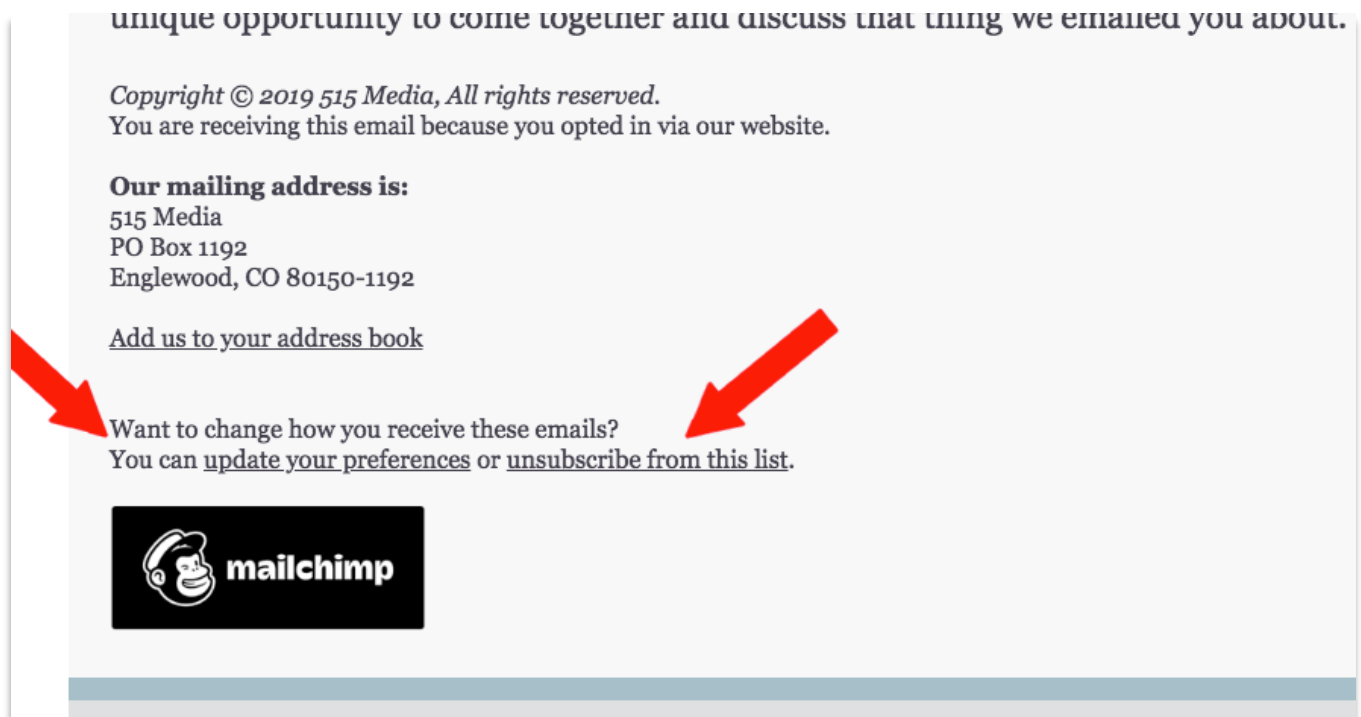
If you would like to edit Subscriber information for an individual, you may do so by clicking on the checkbox next to the subscribers email or clicking on their email directly. Once you do that, additional options will appear that will allow you to take actions such as unsubscribing or deleting the individual from the list, or making other edits to their information.



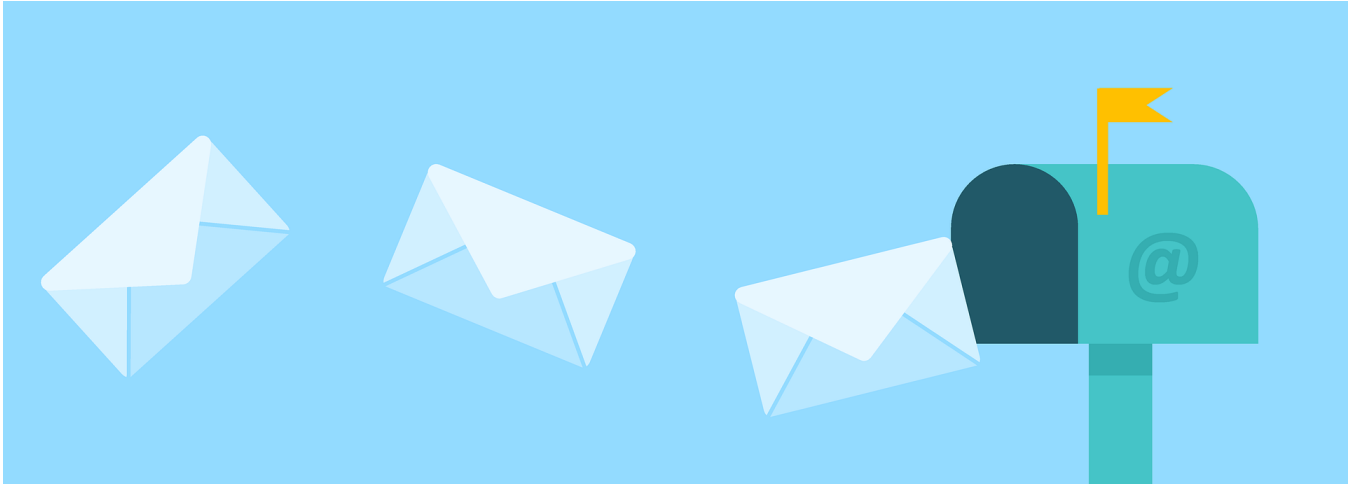
## SUBSCRIBER OPTIONS

For contacts who no longer wish to be subscribed to a newsletter / list, they can unsubscribe via the links that appear at the bottom of the Newsletter Campaign emails sent to the subscriber.

Typically, Mailchimp places these links at the bottom of each Newsletter email message. Please see the sample below:



## CHAPTER 4. HOW TO USE LISTS



### How to Use your Lists

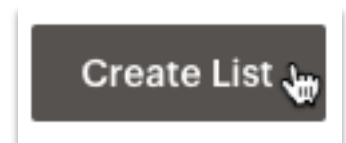
In this section of the guide, you will learn how to create new lists of contacts and subscribers, and how to manage your existing lists.

#### CREATE A NEW LIST

When you create a Mailchimp account, we generate a list for you and populate it with details you provide. Each time you create a new list, you'll be prompted to input default information like your "From" email address and a message to remind your contacts who you are.

To create a new list in your Mailchimp account, follow these steps:

1. Navigate to the **Lists** page
2. Click on the **Create List** button located on the right side of the page.
3. In the box, click Create List.
4. Type in the List details in the fields provided. (see screenshot on next page)





### List details

List name

Default From email address

Default From name

Campaign URL settings

Choose a verified domain to use in your [campaign URLs](#). You must be [authorized to use the domain name](#) you choose.

Remind people how they signed up to your list

5. Review the Contact information for this list, and edit if necessary.

6. In the Form Settings section, choose the opt-in method for your list.

**Enable double opt-in**  
Send contacts an opt-in confirmation email when they subscribe to your list.

Check the box next to Enable double opt-in to send an opt-in confirmation email when someone signs up to your list. Or, leave it unchecked to use single opt-in and add subscribers to your list right away.

7. Enter the email address where you'd like to receive notifications about your list, and select your notifications.

### Notifications

**Daily summary**  
Summary of subscribe/unsubscribe activity

**One-by-one**  
Subscribe notifications as they happen

**One-by-one**  
Unsubscribe notifications as they happen

8. When you're finished, click **Save**.

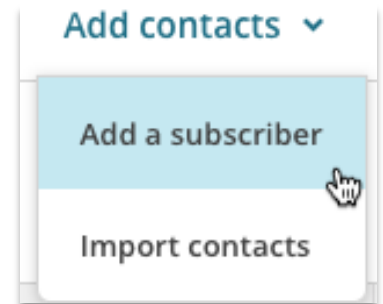
After you create your list, you'll be able to import subscribers or set up a signup form to collect new contacts.

## ADDING NEW INDIVIDUAL SUBSCRIBERS MANUALLY

In addition to editing your Subscribers information, you may also add Subscribers to your Lists manually, assuming the person has given you permission to add them to your list.

This can be done from the **Lists** page in your account. To add a single email address to a list, follow these steps.

1. Navigate to the **Lists** page.
2. Click the name of your list.
3. Click the **Add Contacts** drop-down menu and choose **Add a subscriber**.
4. Type in the subscriber's information and check the **"This person gave me permission to be added to my list"** box.



Add subscriber

Want to subscribe more than one person at a time? [Import a list](#)

Email Address \*

First Name

Last Name

Birthday

 / 

What best describes your gardening experience?

Beginner

Intermediate

Expert

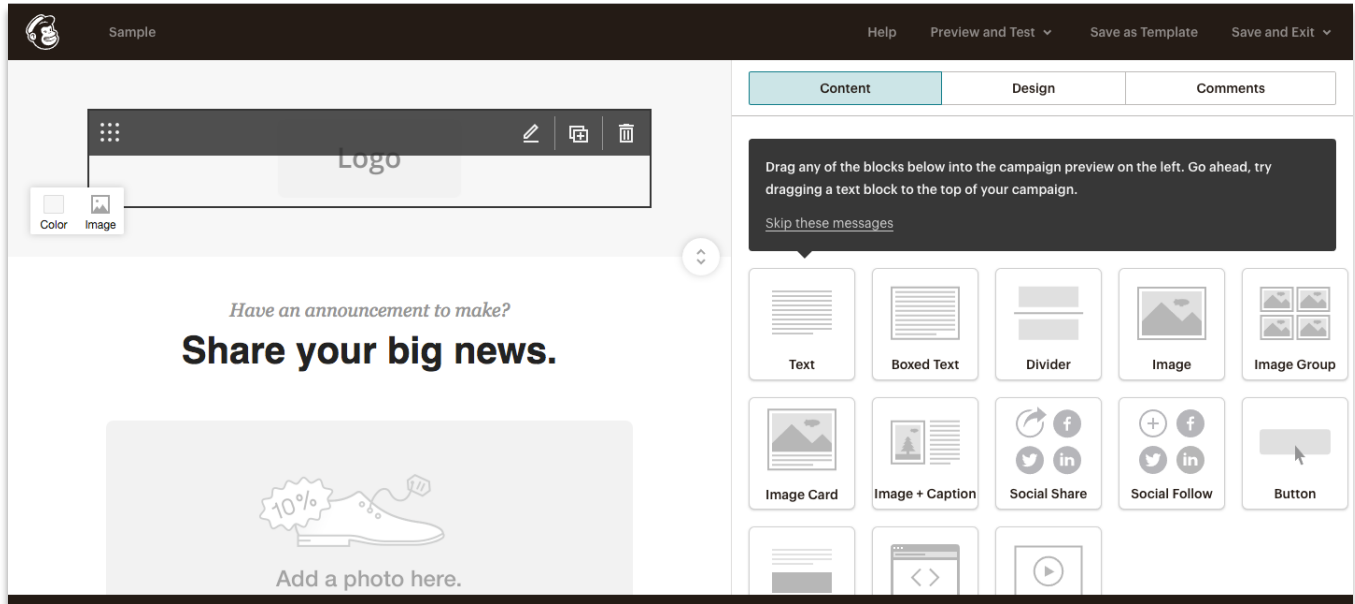
Tags

5. When you're done, click **Subscribe**.

If the email address is already on your list and you want to update the information you have on file, check the  If this subscriber is already on my list, update their profile box.

After the subscriber has been successfully added, Mailchimp will display a success message at the top of the page.

## CHAPTER 5. USING THE NEWSLETTER EDITOR

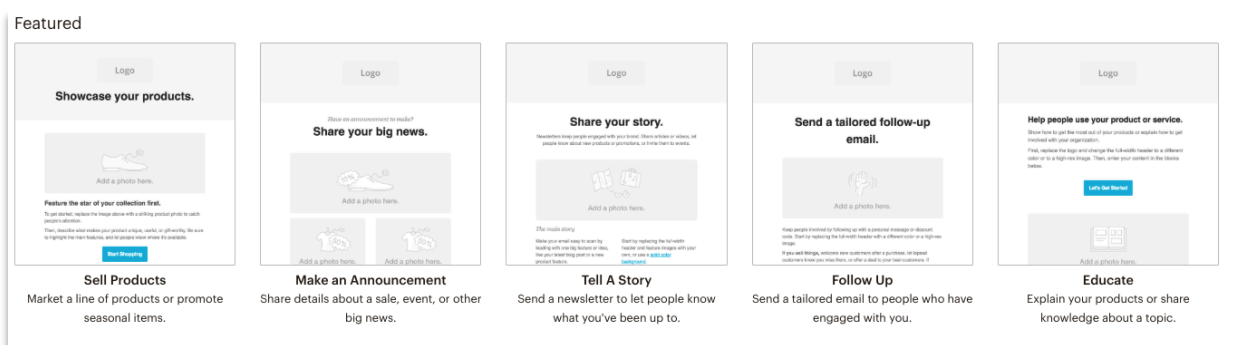


### How to Use the Newsletter Editor

Mailchimp comes equipped with a powerful editor and newsletter templates that will allow you to create catchy, attractive and marketable email blasts with unique layouts.

To help you get started with your new Campaign newsletter layout, Mailchimp offers a wide variety of free templates to choose from, and which provide the foundation for your message.

When selecting a template, the first options you will see are the “Featured” Templates, which have pre-designed layouts based on specific needs.



The **Featured** templates allow you to choose layouts geared for specific purposes, such as:

- **Selling Products:** With this layout you can market and promote your products
- **Making Announcements:** Share details about your events, sales, or other news.
- **Tell a Story:** Share your personal story or let people know what you have been up to.
- **Follow Up:** Send a tailored email to contacts you have previously engaged with.
- **Educate:** You can offer in-depth information about your products or services.

In addition, you can also choose **Basic** templates, that provide a variety of standard layouts. These are typically the most popular templates to choose from as they provide a standard base that is easy to work with and customize.

The **Basic** templates offer 9 different layouts that will allow you to present your content in single column, multi columns, full width, plain text and more.



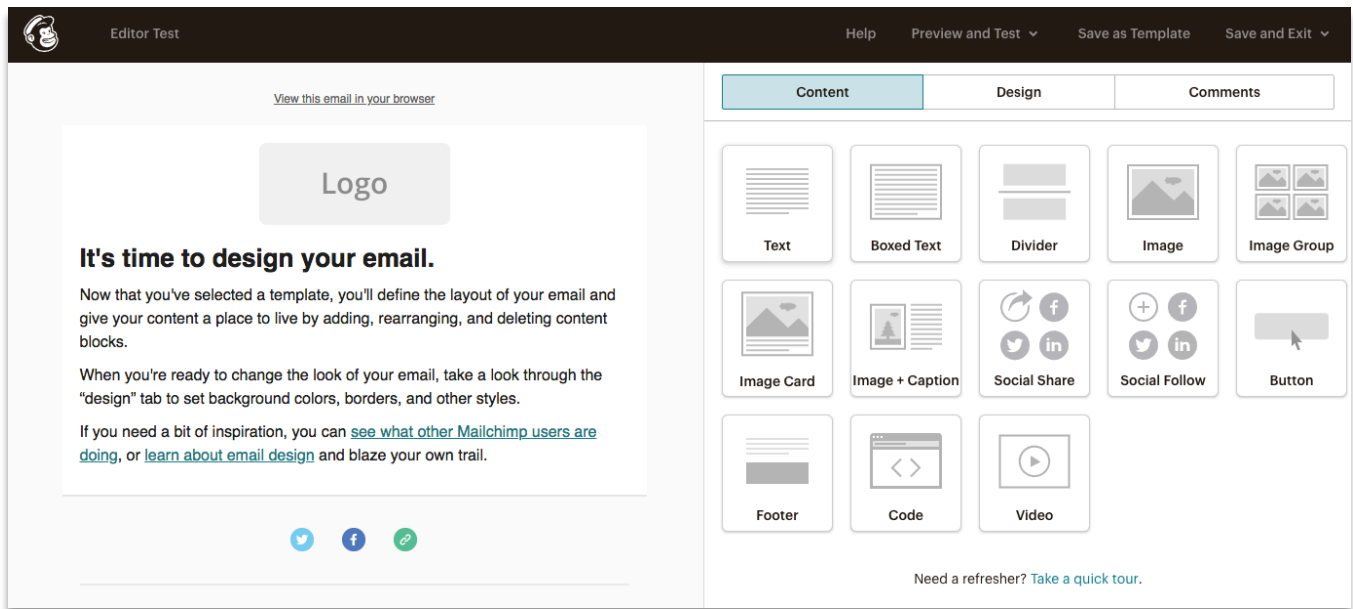
## THE MAILCHIMP EDITOR

After you have chosen your Template, the next step is to start designing your Campaign and adding your content to your newsletter layout. Here is an overview of the editor and its primary features.

One of the great features of the editor is its “Drag-and-Drop” functionality, which allows you to build newsletters with predefined content blocks that you can easily order and customize based on your content.

## EDITOR INTERFACE

The editor interface features an easy-to-use, intuitive design. On the left side, you will find the area which houses your content and displays the layout of your Campaign. Your content appears in individual blocks that can be ordered and customized as desired.



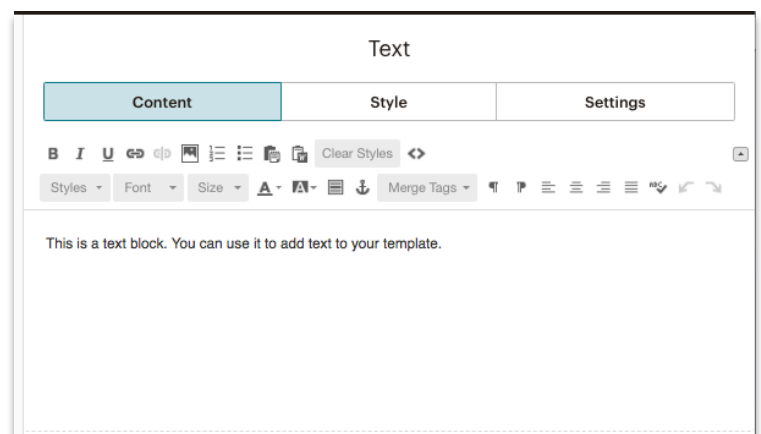
On the right side of the page, you will find the tools and content blocks that you will use to build your layout. There are a variety of content blocks to choose from that will allow you to add text, images, buttons, videos, social media share links and more.

To use any of these blocks in your layout, you just need to simply select one of the blocks, then drag it to the content area on the left. After you have dragged the new block to the content area, you can also drag the block to the desired order.

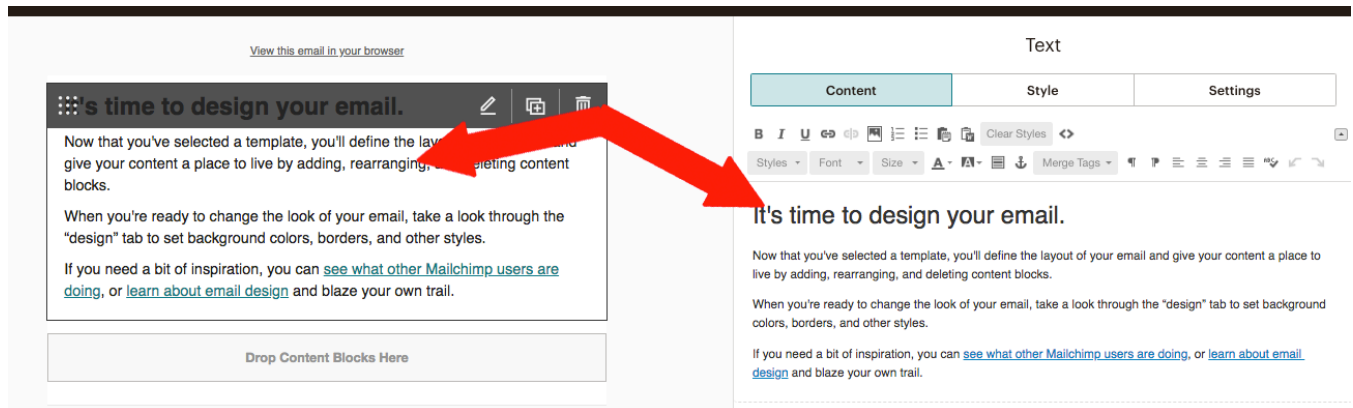
## ADDING CONTENT TO NEW TEXT BLOCK

For example, if you add a new **Text** content block to the content area, on the right side of the page, the "**Content**" tab will open in the Text panel (tab highlighted in blue). In the content area below, you will add in your new text content by either typing it in or copying and pasting it in.

For your convenience, there are additional tools in the formatting toolbar you can use to liven up your text content.

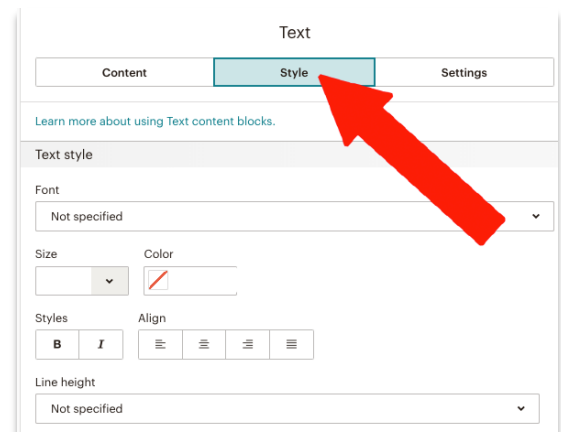


As you enter your text into the editor panel on the right, you will see it simultaneously appear in the content layout on the left.



There are also additional content styling adjustments available in the Text panel. To access these, you will just need to click on the **Style** tab (to the right of the **Content** tab).

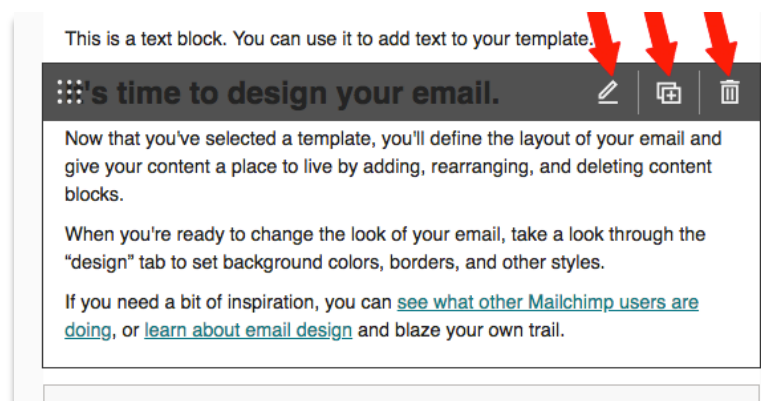
In the **Style** tab, you will find options for changing the Font type, size, alignment and styles. You can also adjust the line-height of your text here.



## EDITING EXISTING TEXT BLOCKS

To edit one of the existing text block in the content layout area (left side), you just simply need to hover your cursor over the desired block. This will reveal a grey tool bar, where you will see 3 icons on the right side.

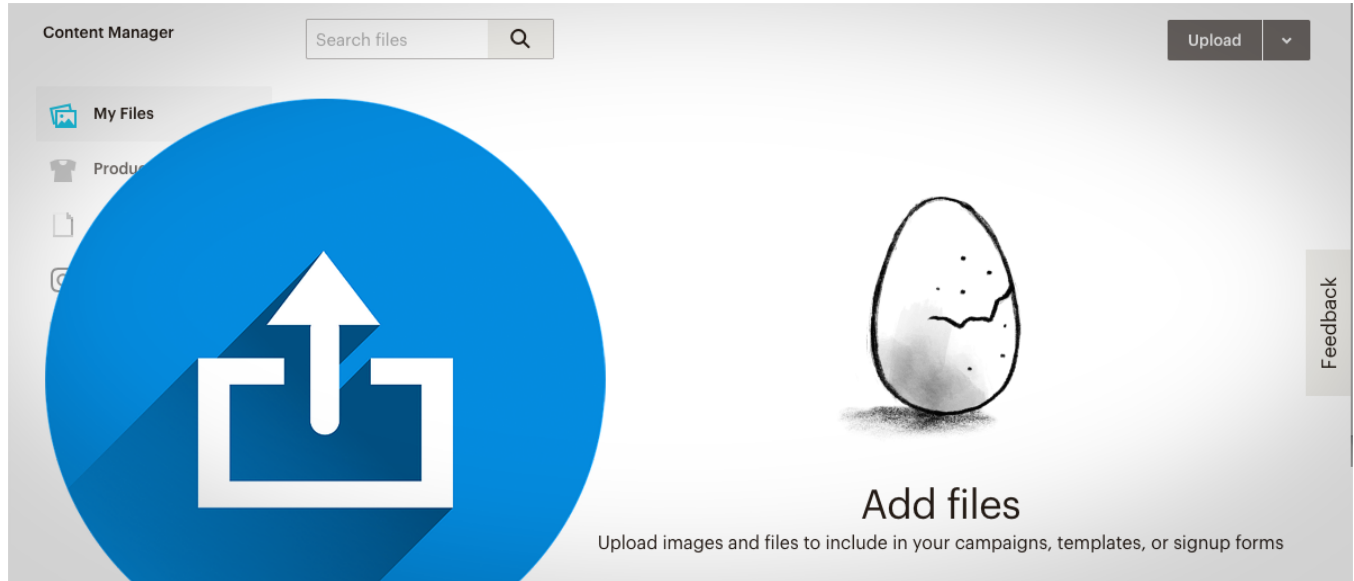
The first icon (pencil shaped), will allow you to make text edits, the second icon (box with + sign) will duplicate the block, and the third icon (trash can) will delete the block.



## SAVING CONTENT IN TEXT BLOCKS

After you have entered and styled the content in your text block you will need to click the **"Save & Close"** button that appears on the bottom of the Text Panel.

## CHAPTER 6. ADDING IMAGE & VIDEO CONTENT



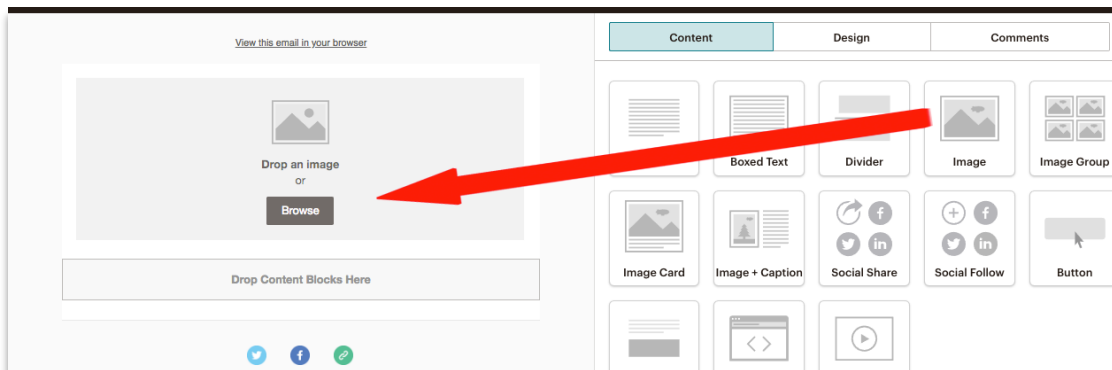
### How to Upload New Content for Use in Your Campaigns

Adding additional media, such as images and videos, to your Newsletter Campaign is very easy with Mailchimp.

#### ADDING IMAGES

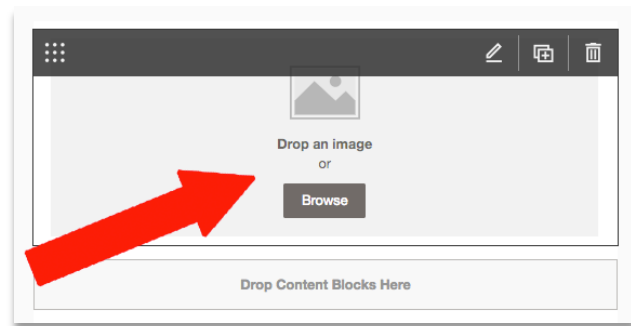
To add a new image to the content area of your Campaign, please follow the below steps:

1. In the **Content** tab on the right side of the Editor page, please drag the “**Image Block**” to desired location in the layout on the left side of the page.

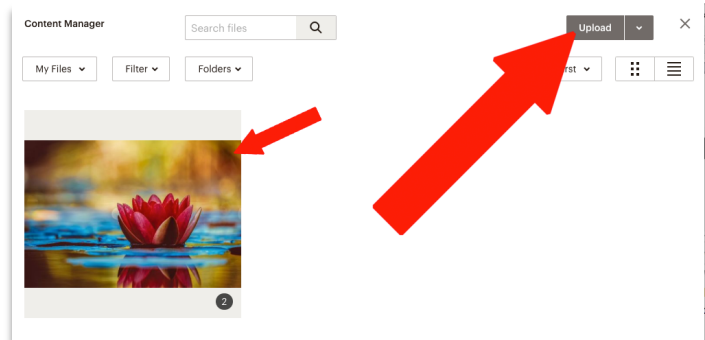




2. Once the Image Block is in place on your layout, you can either drag an image from your Desktop directly into the block where it says **"Drop an image"**, or you can click the **"Browse"** button to select and import a new image. (In this example, we will be using the "Browse" option)

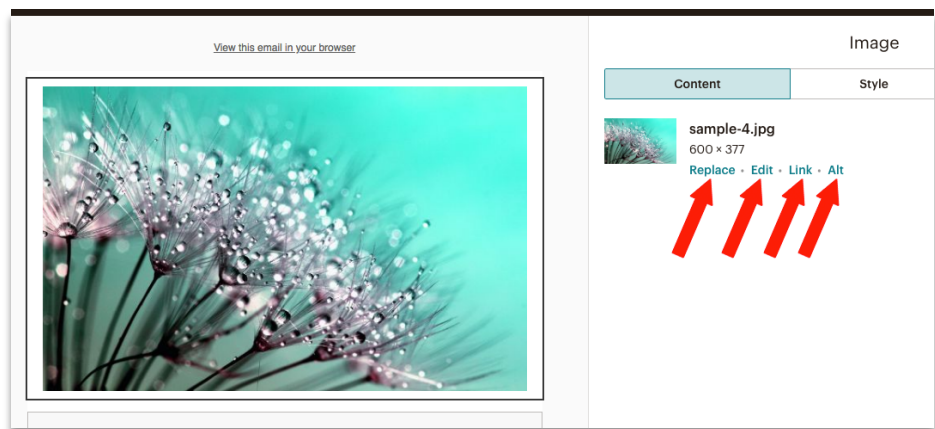


3. After you have clicked the **"Browse"** button, you will arrive on the **Content Manager** page, where you can either select an existing image from your library, or you can click on the **"Upload"** button in the top right corner to add a new image. (For this example, we will be adding a new image)



4. After you have either selected an existing image, or clicked the **"Upload"** button and selected an image from your computer, the image will automatically be inserted into the Image Block on the page.

In the **Content** tab on the right, you will see image info (title, size) and options for replacing the image, editing the image, adding a hyperlink / ALT tag to the image.



For additional image styling options, you can select the **Style** tab, which will allow you to add an image border and rounded corners.

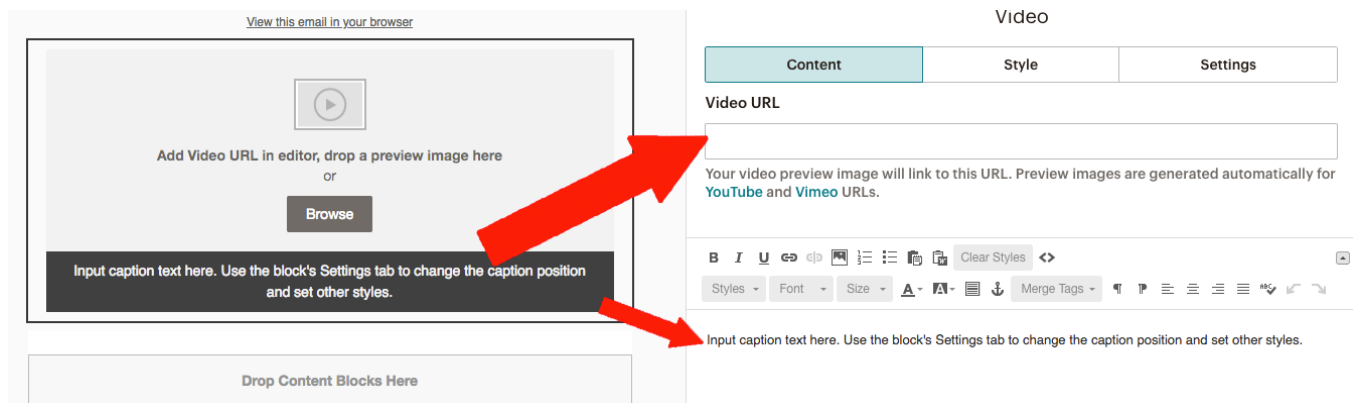
For additional image formatting options, you can click on the **Settings** tab, which will allow you to set the image alignment (left, center, right) and set "edge to edge" margins.

After you have inserted your image and made the desired adjustments, please click the **"Save and Close"** button on the lower right to save your changes.

## ADDING VIDEOS

To add a new video to the content area of your Campaign, please follow the below steps:

1. In the **Content** tab on the right side of the Editor page, please drag the **"Video Block"** to desired location in the layout on the left side of the page.
2. After, you have placed the **"Video Block"** in the layout, on the right side of the page in the **Content** tab, you will need to add the link for your video in the **"Video Block"** field. (Ex. YouTube or Vimeo URLs). Below the Video URL field, you can add a Caption for your video in the text editor area.



For additional image styling options, you can select the **Style** tab, which will allow you to adjust the font type, sizes, line-height, etc...

For additional formatting options, you can click on the **Settings** tab, which will allow you to set the caption position, video alignment, and set "edge to edge" margins.

After you have embedded your video and made the desired adjustments, please click the **"Save and Close"** button on the lower right to save your changes.

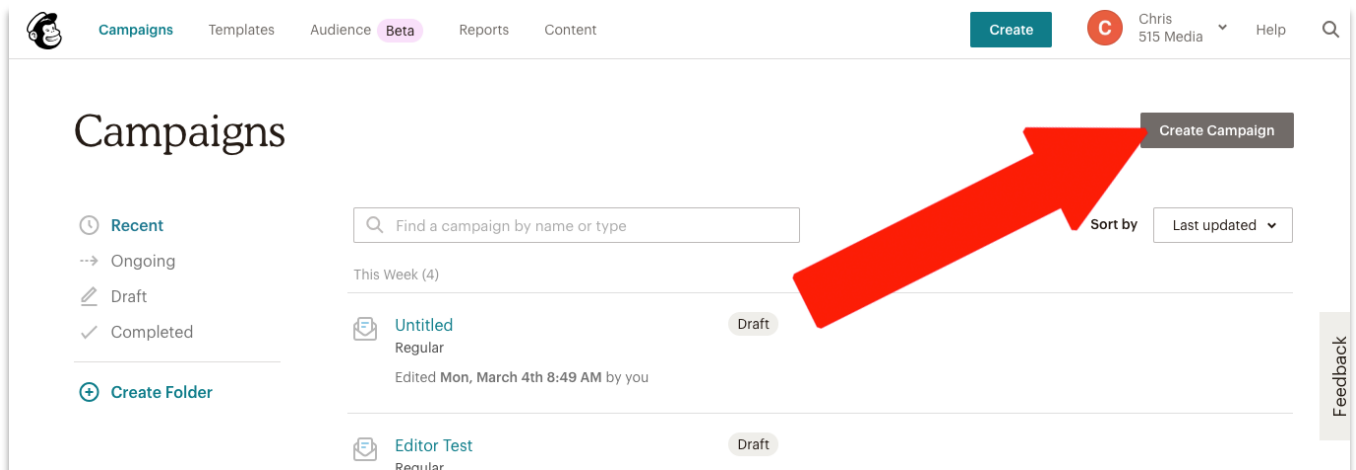
## CHAPTER 7. CREATING AND SENDING CAMPAIGNS



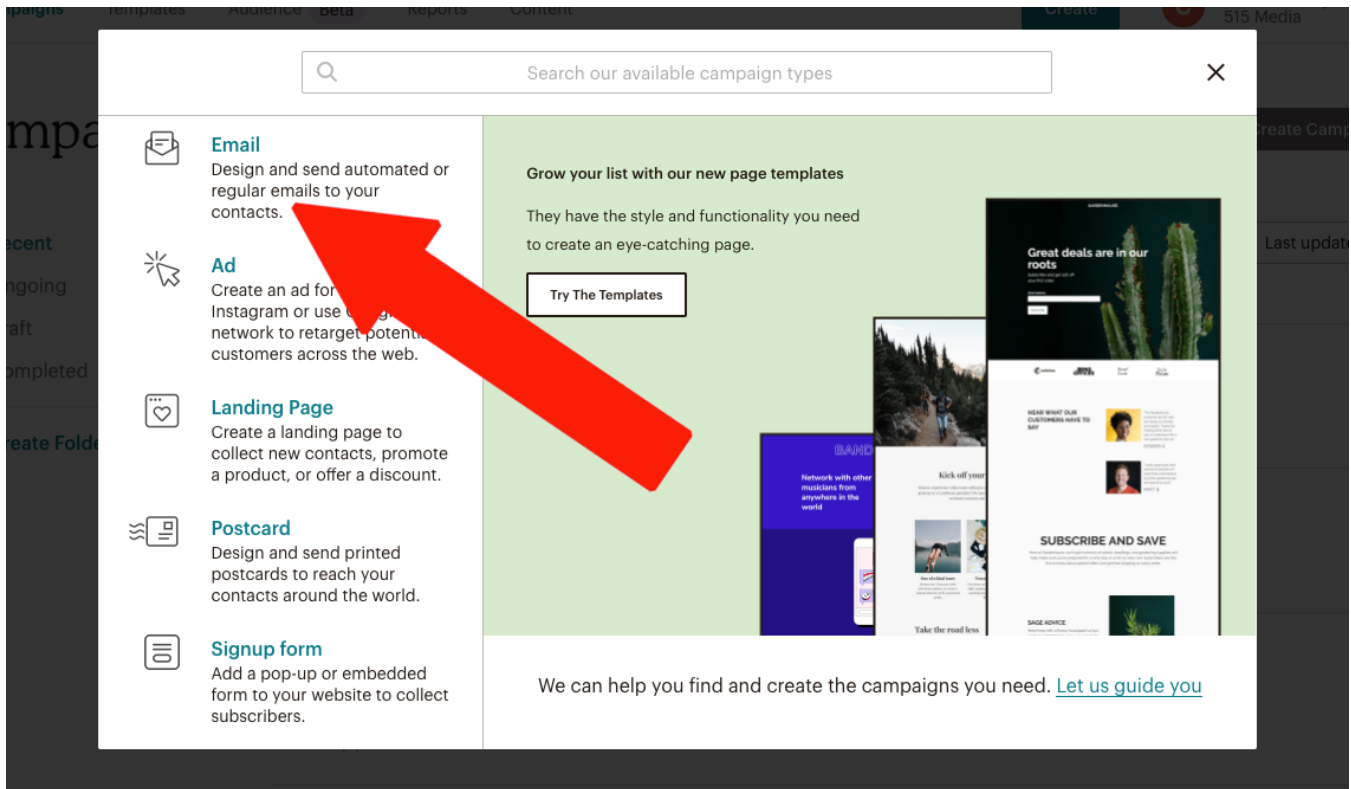
### How to Create a New Campaign, and Send it to your Subscribers

To create a new Email Campaign, and send it out the people on your subscriber list, please follow these steps:

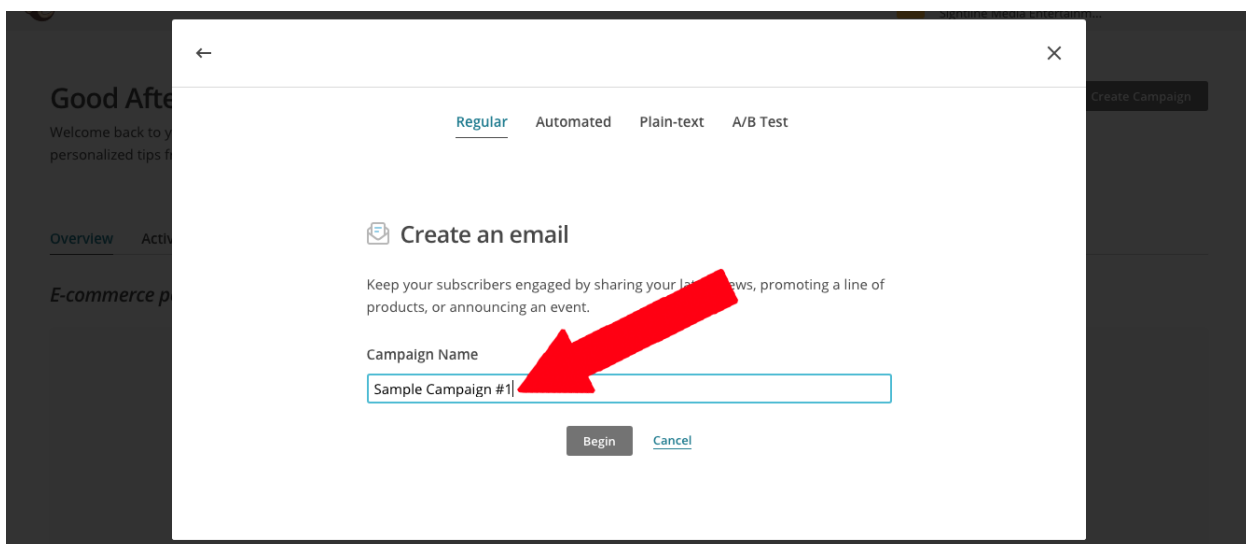
1. Log into your Mailchimp account, go to the **Campaigns** tab/page, then click on the **Create Campaign** button in the top right corner of your screen.



2. This will open a new window where you can select which type of Campaign you would like to start building. Please click on the **Email** option.



3. On the next tab, please select the **Regular** tab, then enter your campaign name in the labeled field. Next, please click the **Begin** button.



This will take you to the Campaign Builder, where you'll choose your settings and design your content.

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## SETUP & DESIGN

Mailchimp's Campaign Builder is designed to let you work on the different parts of your campaign in the order you choose, and review everything at once before you send.

There are four main things to do before you can send.

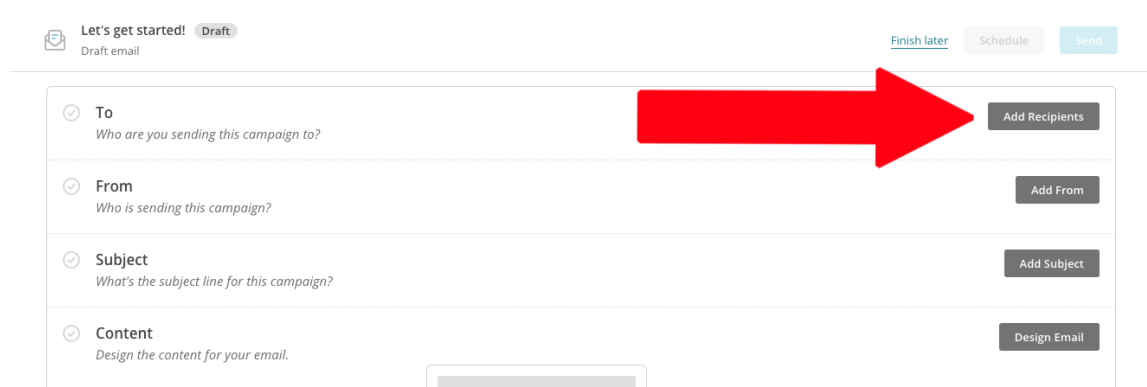
- **Add your recipients in the "To" section.**
- **Add your from name and from email address in the "From" section.**
- **Add your subject line in the "Subject" section.**
- **Design your email in the "Content" section.**

As each task is completed, a green checkmark will appear next to the corresponding section.

## ADD RECIPIENTS

After you have arrived on the Campaign Builder page you will need to choose your recipients of your email campaign follow these steps.

1. In the **To** section, click **Add Recipients**.



The screenshot shows the Mailchimp Campaign Builder interface. At the top left, it says "Let's get started! Draft" with a "Draft email" label. On the top right, there are buttons for "Finish later", "Schedule", and "Send". The main content area is divided into four sections: "To", "From", "Subject", and "Content". Each section has a radio button icon on the left and a button on the right. A large red arrow points to the "Add Recipients" button in the "To" section. The "To" section text reads "Who are you sending this campaign to?". The "From" section text reads "Who is sending this campaign?". The "Subject" section text reads "What's the subject line for this campaign?". The "Content" section text reads "Design the content for your email." Below the "Content" section, there is a placeholder for the email content.

2. In the List drop-down menu, choose the list you want to send to. (see screenshot below)

Who are you sending this campaign to?

List: Abandoned in Berlin Subscribers

Segment: All subscribers on list

Personalize the "To" field > What's This?

Save

From: Who is sending this campaign? Add From

3. In the Segment drop-down menu, choose **All subscribers on list**.

4. Click **Save**.

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## ADD FROM NAME & FROM EMAIL ADDRESS

To set your from name and from email address, follow these steps.

1. In the **From** section of the Campaign Builder, click **Add From**.

Let's get started! Draft

Draft email

Finish later Schedule Send

To: Who are you sending this campaign to? Add Recipients

From: Who is sending this campaign? Add From

Subject: What's the subject line for this campaign? Add Subject

Content: Design the content for your email. Design Email

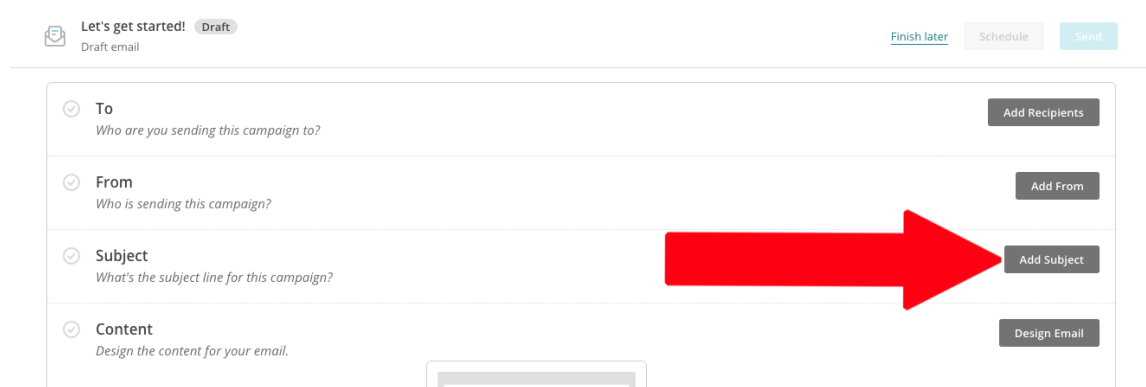
2. Your "From" name and email address should automatically show up. If not, enter your from name and email address.

3. Click **Save**.

## ADD SUBJECT

To set your subject line and optional preview text, follow these steps.

1. In the **Subject** section of the Campaign Builder, click **Add Subject**.



The screenshot shows the Campaign Builder interface. At the top, there is a header with "Let's get started!" and a "Draft" button. Below this, there are four sections: "To", "From", "Subject", and "Content". Each section has a corresponding button: "Add Recipients", "Add From", "Add Subject", and "Design Email". A red arrow points to the "Add Subject" button.

2. In the Subject field, enter a subject line for your email.

3. In the Preview text field, you can enter up to 150 characters that will display next to your subject line in recipients' inboxes. This field is optional.

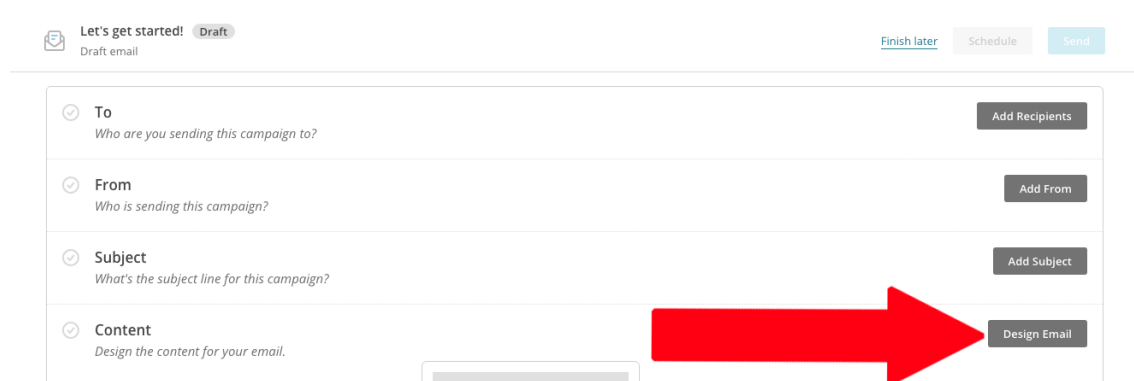
4. Click **Save**.

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## DESIGN EMAIL

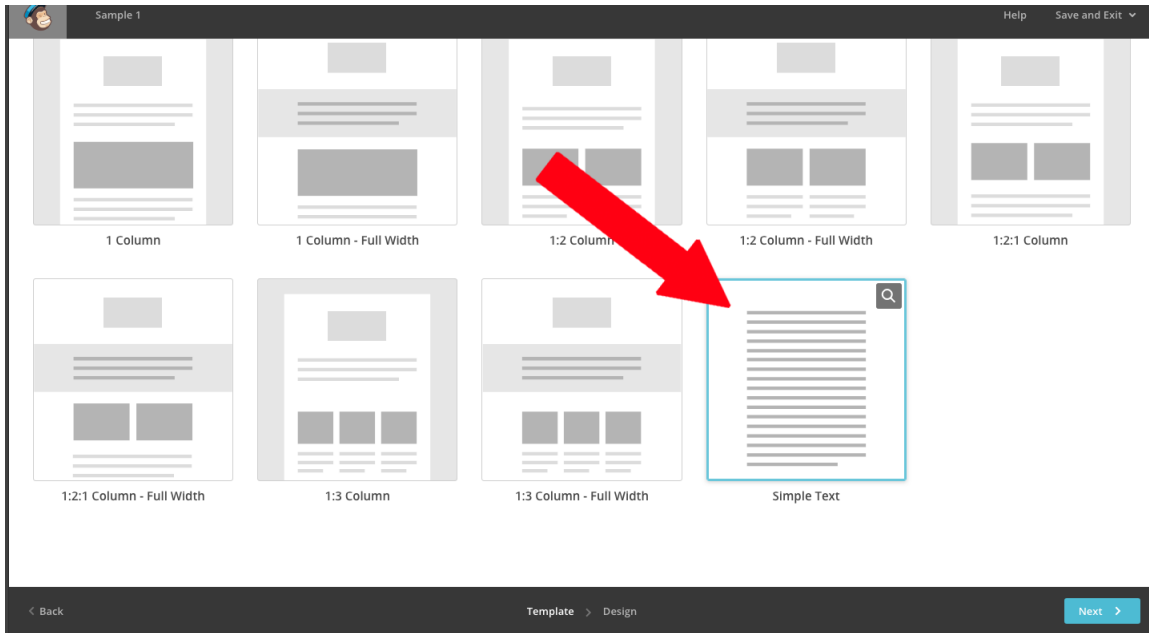
To design the content for your campaign, follow these steps.

1. In the **Content** section of the Campaign Builder, click **Design Email**.

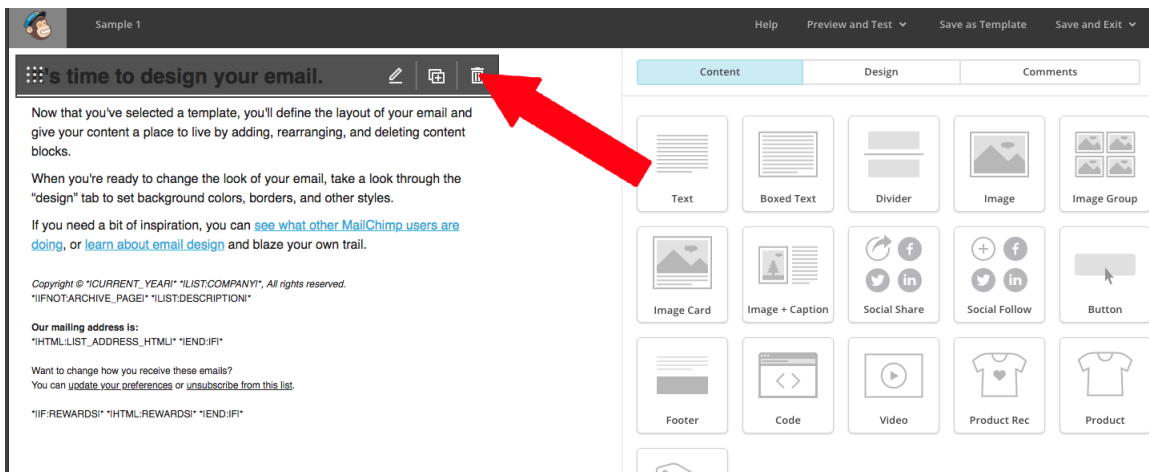


The screenshot shows the Campaign Builder interface. At the top, there is a header with "Let's get started!" and a "Draft" button. Below this, there are four sections: "To", "From", "Subject", and "Content". Each section has a corresponding button: "Add Recipients", "Add From", "Add Subject", and "Design Email". A red arrow points to the "Design Email" button.

2. This will open up a new page where you can choose a template to start with. Please scroll down to the bottom where you will see a template called **"Simple Text"** Please select it, then click on the **Next** button

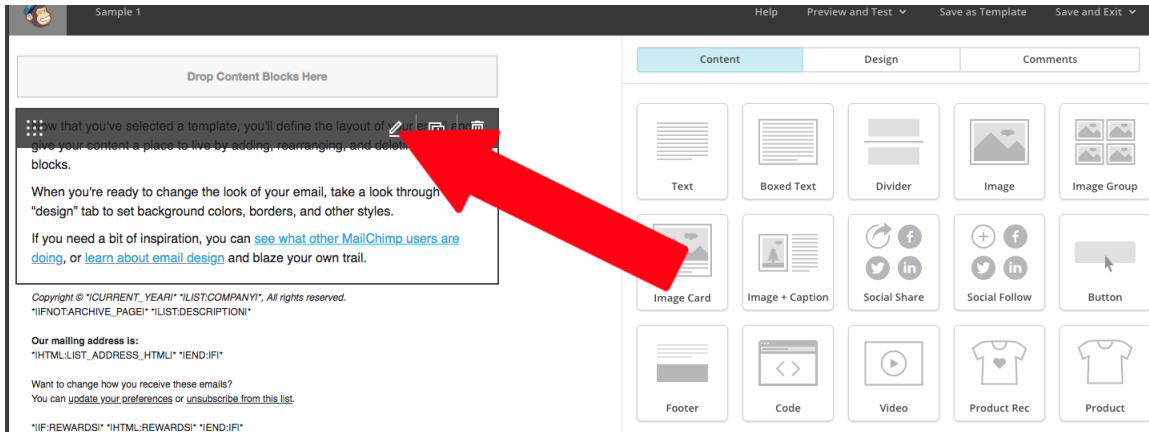


3. After you select the template and click Next, you will arrive in the Email Designer, where you will see some placeholder text on the left side of the screen. You can click on the text sections and start editing right away. For example, if you want to get rid of the top "Title" text, you can simply place your cursor over that section, then click on the Trash Can icon to remove it.

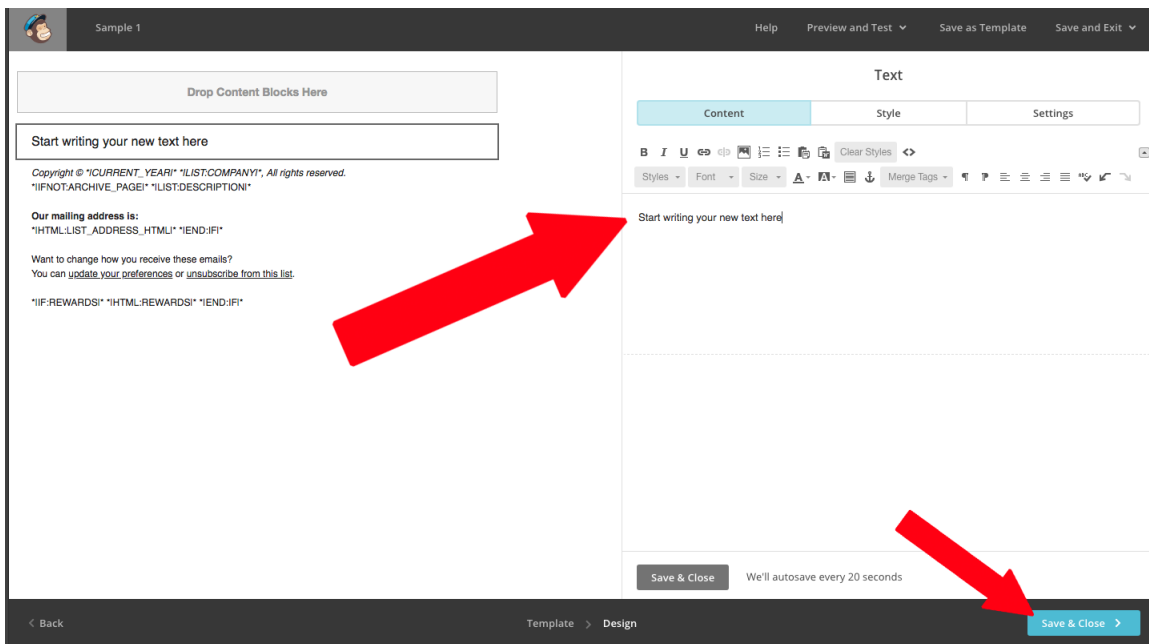




To edit the email body text, you can simply place your mouse over the body text and click on the "Edit" icon which is shaped like a pencil.



4. After you have clicked the "Edit" icon, on the right side of the screen, a content box with the text should appear, and you will be able to add your new text there and make formatting adjustments using the formatting toolbar (just like in Microsoft Word) (see image below)



(OPTIONAL) After you have added and edited the content, you may click the **Preview and Test** drop-down menu (located in top menu bar) to access testing tools before you send your email.

5. After you complete your design, click **Save and Close** (located on the bottom right corner of the page) . You are almost ready to finish up and Send your Campaign!

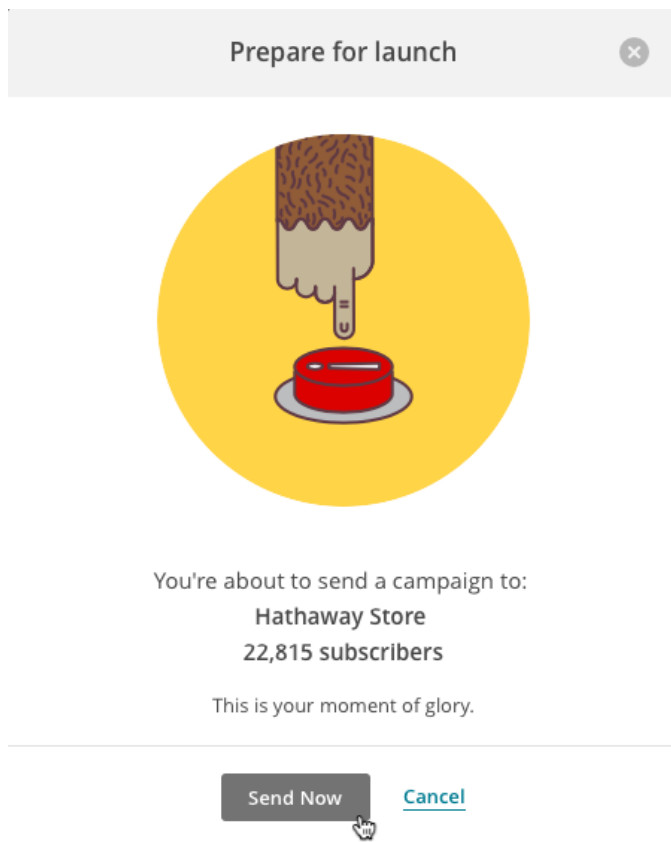
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## SEND CAMPAIGN

After you've completed the **To**, **From**, **Subject**, and **Content** sections of the Campaign Builder, you should see a green checkmark next to each. That means your regular email is ready to schedule or send.



If you're ready to send the campaign to your subscribers, click the **Send** button. Then, in the **Prepare for launch** modal, click **Send Now** to confirm your send.



**Your campaign is on its way!**

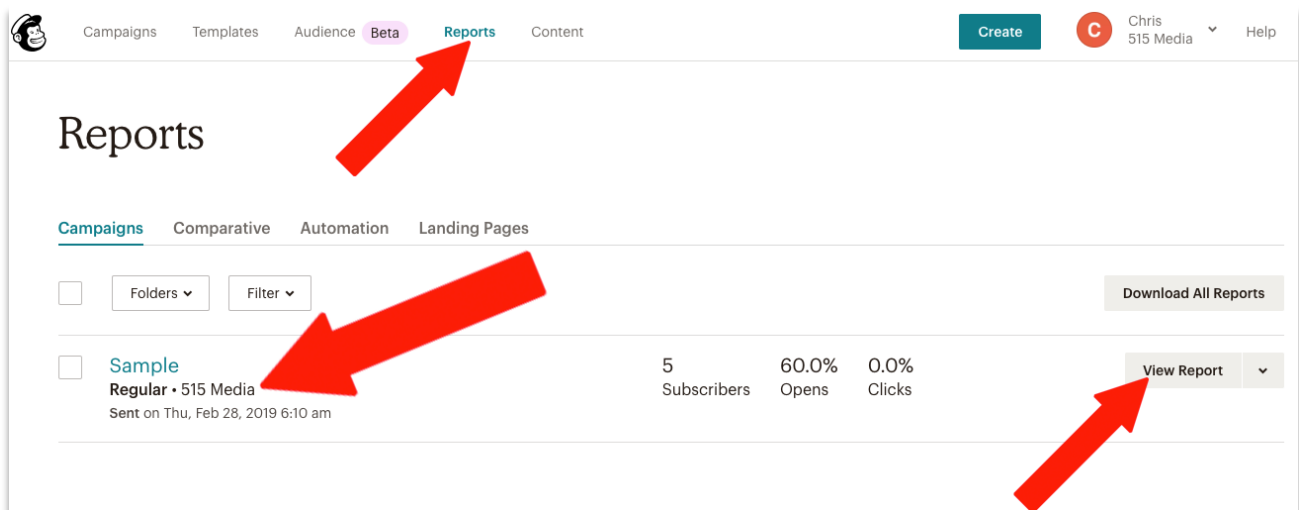
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## CHAPTER 8. REPORTS



### How to Access your Reports

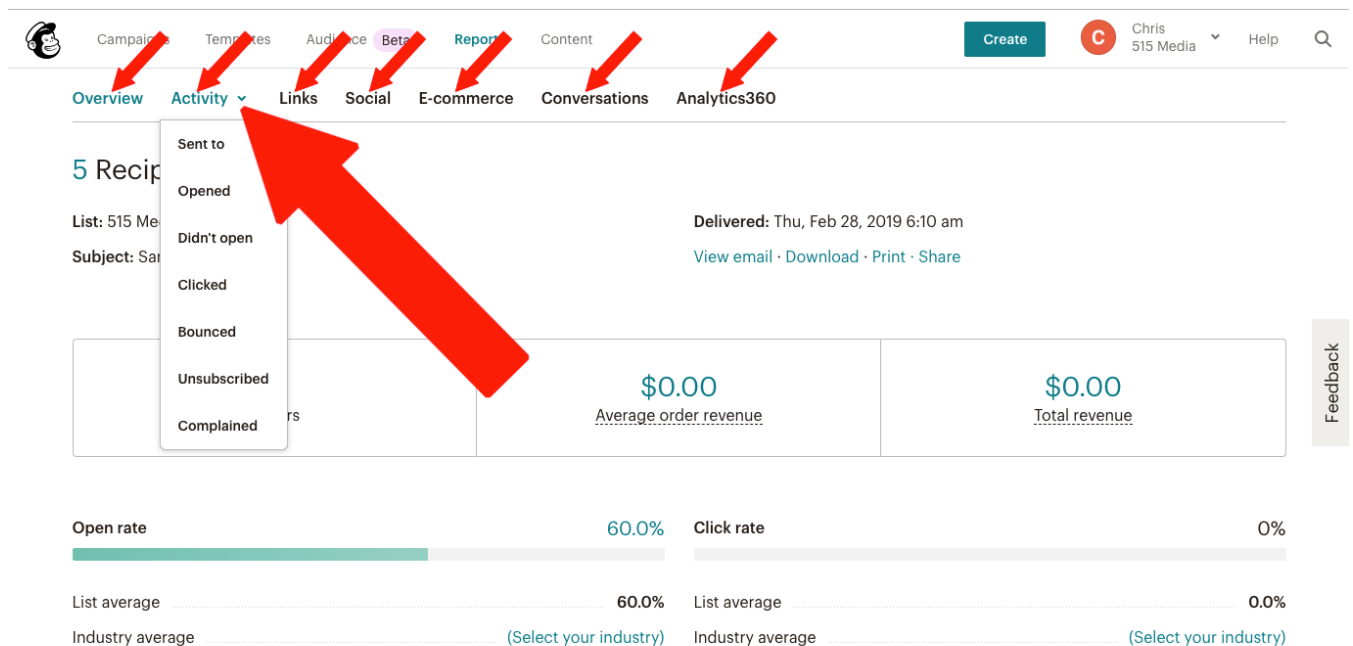
After you send your first campaign, you'll be able to see data on how it performed, who opened it, and more! You can access detailed performance reports by going to the **Reports** tab/page.



The main **Reports** page will show a list of your individual Campaigns, and basic stats for each entry, including number of subscribers, opens and clicks. To view the full report data for each Campaign, you will need to click the **“View Report”** button.

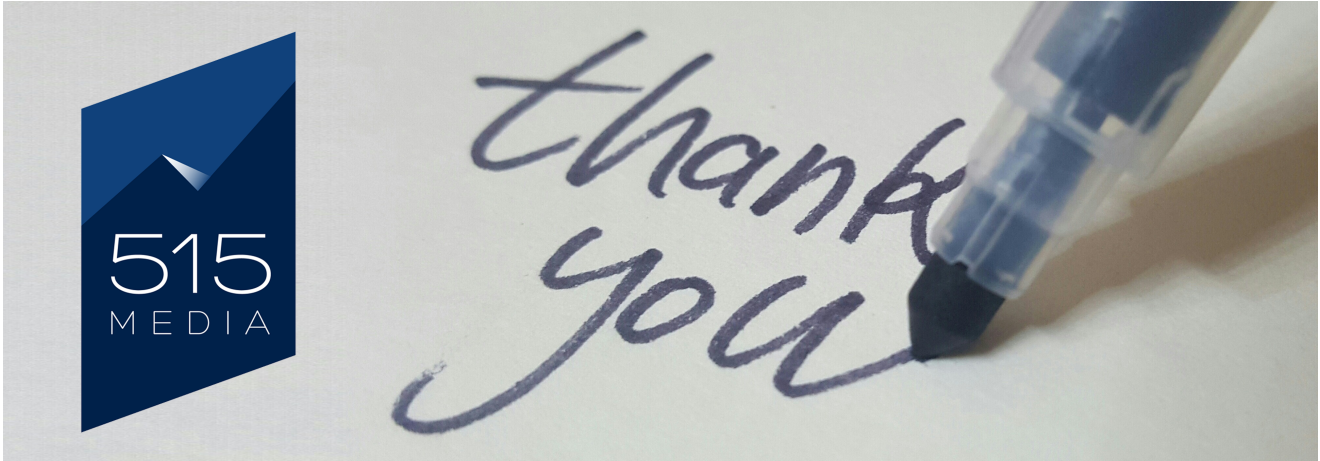
This opens the individual report page which opens on the **Overview** tab by default. Here is where you will find general information and stats on your Campaign performance. (recipients, opens, etc.)

At the top of the page you will see a row of tabs for different types of specific reporting (Activity, Links, Social, eCommerce, Conversations, Analytics 360)



One of the most useful tabs is **“Activity”**. This main tab contains 7 additional subtabs that allow you to access very insightful information on who your campaign was sent to, who opened it, who didn't open it, who clicked on links in your Campaign, which emails bounced, who unsubscribed, and who complained about your email. and will let you know who is reading your email blasts, who is clicking and who is not engaging.

## CHAPTER 9. FINAL THOUGHTS



We hope you have enjoyed this guide and found it to be useful as you are learning how to use Mailchimp to create your Newsletter Campaigns. If you have any questions, please feel free to contact us anytime. We are always happy to help.

From all of the 515 Media team, we look forward to your success in your online business venture!



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