

MailChimp Basics
Or
If Darwin had Email
Part 1

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1 INTRODUCTION TO MAILCHIMP

1.1 MAILCHIMP USES

Project Onward uses **MailChimp** for bulk email mailings (“blasts”). MailChimp facilitates the sending of bulk email. This email is formatted and sent in such a way as to meet the standard requirements for bulk email. *Bulk email standards* help:

- minimize the possibility of emails being flagged as “spam” or “junk email”
- minimize the possibility of the sender being penalizing by an email provider.

MailChimp (<http://mailchimp.com>) is used to:

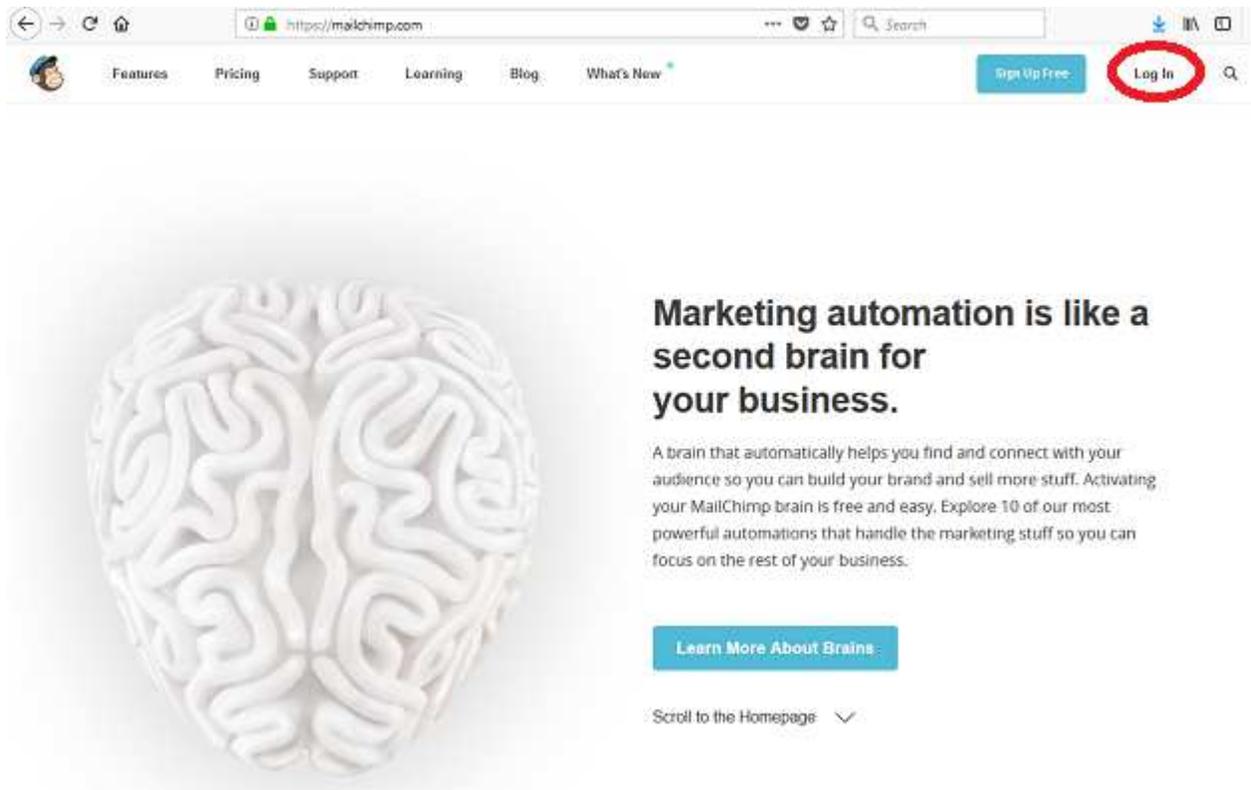
- **maintain the Project Onward mailing list** - Member email addresses and basic information can be added manually or people may subscribe by themselves. Once names are added, MailChimp monitors the list and keeps statistics, and/or updates the list members, based on activity and response.
- **send bulk email mailings** (MailChimp calls a mailing, a “*campaign*,” these are often referred to, generally, as “*blasts*”). MailChimp has web browser enabled screens to put together a blast using graphics and/or text, based on templates or past mailings. When you send the blast, MailChimp monitors the responses based on:
 - opens
 - clicks (on different links within the mailing)
 - “unsubscribe me” requests
 - recipient “in-box full” responses
 - bad email addresses (MailChimp removes the address from the list after three campaign attempts in which the response is a “bad address”)

1.2 MAILCHIMP ACCESS

You need to have a MailChimp account (username) assigned to you by the Systems Administrator. This account will be linked to the Project Onward master account.

Note: If you create your own account, you will not be linked to Project Onward. You must have the Systems Administrator create or link your account.

1.2.1 First time access on a new account



In a web browser, go to <http://mailchimp.com> (as shown above).

LEFT-CLICK on **Log in** (upper-right of screen, as shown above.)



Log In

Need a MailChimp account? [Create an account](#)

Username

SpongeBob

Password

 Show

Log In

Keep me logged in

[Forgot username?](#) [Forgot password?](#)

You have already been registered to the Project Onward MailChimp account (and to the MailChimp training account which we will use for this training) by your Systems Administrator.

Enter your username (as pictured above). *If you don't know it, see the Training Instructor and/or the Project Onward System Administrator.*

You don't have a password yet, so, click on "Forgot password?" (**red circle**, above).



Reset Your Password

Fear not. We'll email you instructions to reset your password. If you don't have access to your email anymore, you can try [account recovery](#).

Username

SpongeBob

We'll email you a password reset link.

Reset Password

[Return to login](#)

Follow the directions to reset your password. (picture above)

(As part of the process, you will need to check your email. *If you don't see an email from MailChimp, make sure to also check your **Spam** folder.*)

1.2.2 Normal Login (now that you have a working password)



Log In

Need a MailChimp account? [Create an account](#)

Username

Password [Show](#)

Log In

Keep me logged in

[Forgot username?](#) - [Forgot password?](#)

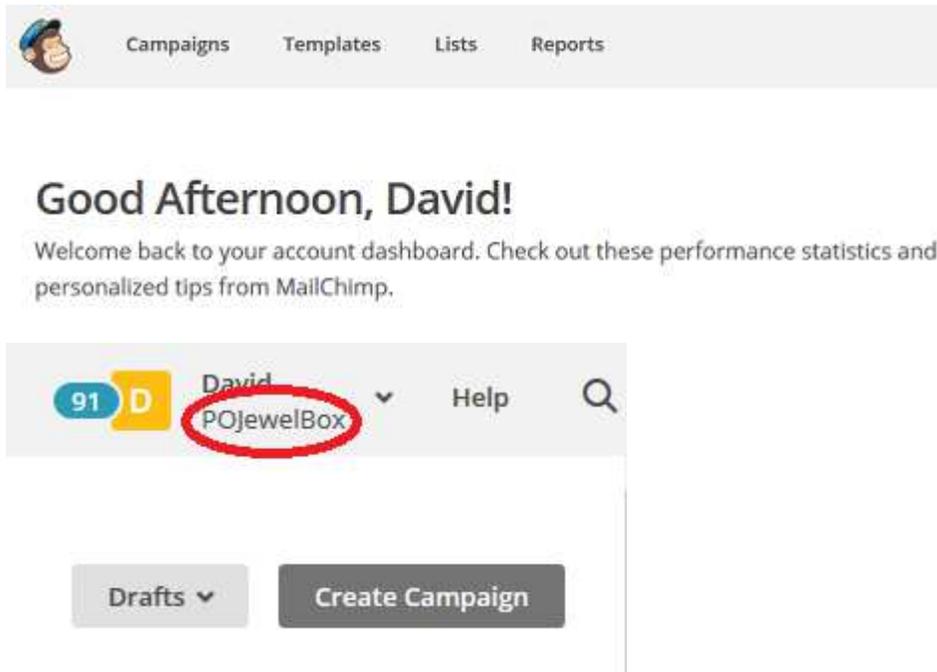
Now that you have a password, just enter your username and password in the MailChimp Login screen.

1.2.3 Forgot your username or password?

Use the links at the bottom (picture above). Follow the directions.

(As part of the process, you will need to check your email. *If you don't see an email from MailChimp, make sure to also check your **Spam** folder.*)

1.2.4 You're in!



Notice the name under your username, in the upper right of the screen. (Picture above.) This is the company name.

Project Onward's MailChimp account is named, "POJewelBox" (as shown above).



Note that the MailChimp account for this TRAINING is "Pencildave." (Picture above).

If you don't see this, you logged into the wrong MailChimp account.

2 EMAIL LIST MANAGEMENT IN MAILCHIMP

MailChimp is used to maintain the mailing list.

- Mailings from Project Onward contain links for recipients to unsubscribe from the mailing list.
 - Additionally, the Project Onward website, as well as social media like Facebook and other communications use forms and links to MailChimp for recipients to subscribe or unsubscribe.
 - Besides people being able to manage their own subscriptions, MailChimp facilitates management of the mailing list (adding names, updating information, unsubscribing names).
 - MailChimp also provides facilities to monitor and analyze the performance of mailings as well as to facilitate better response rates.
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2.1 ACCESSING THE MAILING LIST



Click on the “Lists” link (upper left)



Project Onward has ONE email list: “**Project Onward Email List (All)**” (red circle, above). **Don’t create multiple mailing lists.**

This is very important. It is tempting to create multiple lists, as your needs develop within an organization. But multiple lists create their own problems and multiply your headaches in list management. **For targeted emails to subsections of the list, MailChimp Groups and Segments are used (advanced topic), NOT multiple email lists.**

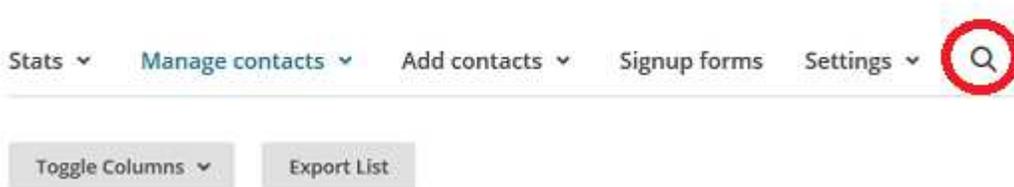
Click on the list name (as pictured above).

2.2 ADD AN EMAIL ADDRESS (SUBSCRIBER) IN MAILCHIMP

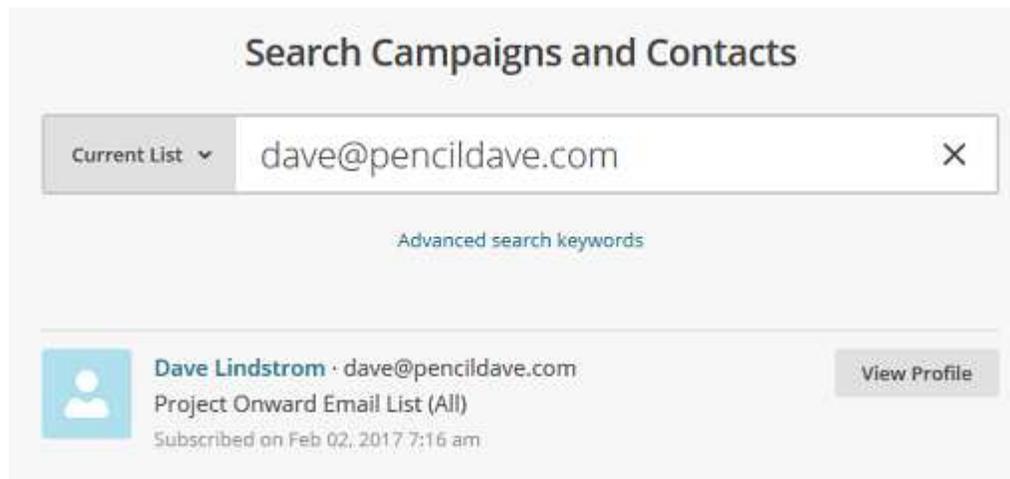
2.2.1 Always search first, to avoid duplicates

It is important to always search a name or address before adding it. This avoids duplicates. Don't assume that the information is new or not already there.

Project Onward Email List (All) 2,614

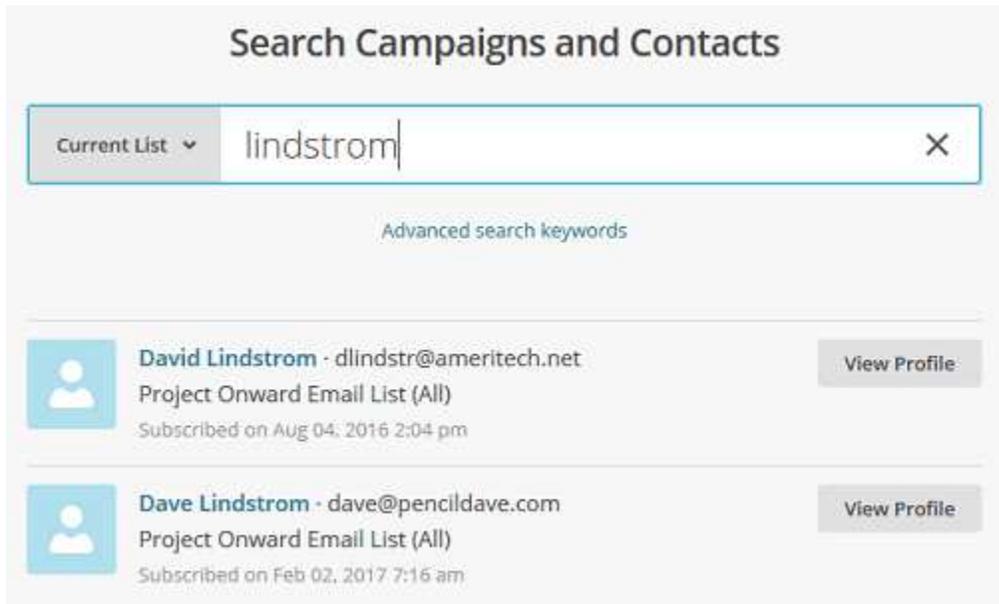


Use the magnifying glass icon (picture above)



Type the email address to make sure it is not already on the list. (picture above) This one is already on the list.

You can click on "View Profile" to view or edit information such as name or zip code.



Note that you can also search a name or a zip code. **But be careful. Not all email addresses on the list have name or email information.**

2.2.2 Add the new subscriber

Project Onward Email List (All) 2,624



Click on the down-arrow to the right of “Add contacts,” then click on “**Add subscriber**” (picture above).

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

Email Address * 

dave@pencildave.com

First Name

Dave

Last Name

Lindstrom

Zip Code

60643

Fill in the all the fields that you can. (The **red star**, as indicated by the **red arrow**, means that the field is **required**.)

The zip code helps for targeted mailings (picture above).

Empty Campaigns and segments only

heART Campaign 2017 donors not buyers

heART Campaign 2017 buyers_not_donors

heART Campaign 2017 donated_and_bought

Email Type

Text HTML

This person gave me permission to email them
This person will not receive a confirmation email from MailChimp. Since you're adding this recipient manually, they won't have an opt-in IP address or date in your records, so be extra sure you have permission first. [Learn more](#)

This person is already on my list, update their profile

Subscribe

Don't worry (for now) about the checkboxes for different types (empty, in the picture above). These are for targeted mailings, and will be covered in more advanced training.

Make sure you do check both boxes at the bottom (picture above):

- This person gave me permission to email them
- If this person is already on my list, update their profile

Then click the "Subscribe" button (picture above).

Mission accomplished. danceswithpugs@gmail.com was successfully added to your list. [View Profile](#)

Make sure to **check the green message box** at the top of the screen. This will tell you the status (success, failure or otherwise) of you update (picture above).

Oh Joy! dave@pencildave.com was already on your list so we updated their settings. [View Profile](#)

Be careful. Make sure you read the message! The green message box in the example notes that you might have inadvertently just changed information for someone who was already subscribed (picture above). **This is why it is always important to search a name or address before adding a new one.**

Whoops, dave@pencildave.com is already subscribed to your list. [View Profile](#)

The **orange message box** (picture above) tells you if there was a problem, such as the name already being on the list.

Click “**View Profile**” if you want to view and/or update any information such as name or zip code.

2.2.3 View or Update information for a current subscriber

You can check if someone is currently subscribed or view and/or update information for a current subscriber. Information that Project Onward tracks currently includes:

- **Email address** (always required)
- **First name** (if known)
- **Last name** (if known)
- **Zip code** (if known – useful for targeted emails to a regional area, for instance, to email addresses in the Chicago area)
- **Groups or segments that the person belongs to** – useful for target emails based on known categories of information that Project Onward tracks – example: “Christmas Ornament buyer”

Lists

Sort by: Custom order ▾

<input type="checkbox"/>	Project Onward Email List (All) Created May 06, 2015 1:51 pm	2,624 Subscribers	20.7% Opens	0.7% Clicks
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Access the List – click on the list name (picture above)

Project Onward Email List (All) 2,614

Stats ▾ Manage contacts ▾ Add contacts ▾ Signup forms Settings ▾ 

Toggle Columns ▾ Export List

Use the magnifying glass icon (picture above)

Search Campaigns and Contacts

Current List ▾ X

Advanced search keywords

 **Dave Lindstrom** · dave@pencildave.com
Project Onward Email List (All)
Subscribed on Feb 02, 2017 7:16 am



Type the name or email address (picture above)

Click on “View Profile” to view or edit information (picture above)



Campaigns

Templates

Lists

Reports

Project Onward Email List (All) 2,614

Stats ▾

Manage contacts ▾

Add contacts ▾

Signup forms

Settings ▾





dave@pencildave.com
Dave Lindstrom
Subscribed Feb 02, 2017 7:16 am
★★★★★

+ VIP Unsubscribe Delete

Details

Activity

Notes

Conversations

E-commerce

Social Profiles

Subscriber details

Edit

Email Address

dave@pencildave.com

First Name

Dave

Last Name

Lindstrom

Zip Code

60643

Click on the “Edit” button, next to Subscriber details – in this example, we will update information for *Dave Lindstrom* (picture above)

Subscriber details

Edit

Email Address *

dave@pencildave.com

First Name

Dave

Last Name

Zip Code

Save

Cancel

Make updates to information. In this example, the Last name and Zip Code hadn't been included for the subscriber. We want to fill that in, as well as change the First Name (as pictured above).

Subscriber details

Edit

Email Address *

dave@pencildave.com

First Name

David

Last Name

Lindstrom

Zip Code

60643

Save

Cancel

Click the "Save" button (as pictured above).

Can I change the email address? Yes. For example, a person may have sent you information that they have a new email address. **But be careful. Make sure your new information is correct.** You don't want to overlay a good email address with an older one, or bad one, based on erroneous information.