

MailChimp Basics
Or
If Darwin had Email
Part 2

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1 CAMPAIGNS (“BLASTS”)

MailChimp is the facility that Project Onward uses to send email blasts (which MailChimp calls, “Campaigns.”)

1.1 CREATE A CAMPAIGN (“BLAST”)



Click the “Create Campaign” button on the right of the screen. (Picture above).

1.1.1 Use the “Create an Email” wizard

We know all the shortcuts because we live here!
We'll help you find and create the campaigns you need.

Let us guide you



Click on “Create an Email” (picture above).

(Don't use “*Let us guide you*,” for now. This guides you through other tasks, not covered in this introductory training.)

Create an email

Keep your subscribers engaged by sharing your latest news, promoting a line of products, or announcing an event.

Campaign Name

My First Blast 

Begin 

Type a name for the blast. This name will be used for managing and tracking. **The name will be seen only by you, not by your recipients.** Click the “**Begin**” button when you are ready. (Picture above).

1.1.2 Step 1 - Recipients

PO Training List (4 subscribers)

Entire list  Saved or pre-built segment Group or new segment

4 recipients. Everyone in your list will receive this email.

Choose to send to the Entire list (Picture above). Groups and Segments are used for targeting subsets of subscribers. For most mailings, we send to the Entire list. (Targeting mailings through usage of Groups and Segments is covered in Advanced training.)



Notice that, at the bottom of the screen, you are on the First Step: “Recipients.” (Picture above) This is the first of five steps, in creating the blast. **You proceed to the next step by clicking on the “Next” button**, at the bottom right of the screen. But **you can always go back** to a previous step, if you want to change something, by clicking on the step name in the menu on the left side of the bottom of the screen.

1.1.3 Step 2 - Setup

Campaign info

Campaign name
My First Blast
Internal use only. Ex: "Newsletter Test#4"

Email subject 111 characters remaining
Why not make this Friday UNFORGETTABLE? ↩️

Preview text 118 characters remaining
Meet an artist at Project Onward ↩️
This snippet will appear in the inbox after the subject line.

From name 86 characters remaining
Project Onward ↩️
Use something subscribers will instantly recognize, like your company name.

From email address
training@pencildave.com ↩️

Use Conversations to manage replies Paid accounts only
When enabled, we'll generate a special reply-to address for your campaign. We'll filter "out of office" replies, then thread conversations into your subscribers' profiles and display them in reports.

Personalize the "To" field
Include the recipient's name in the message using [merge tags](#) to make it more personal and help avoid spam filters. For example, *|FNAME|* *|LNAME|* will show "To: Bob Smith" in the email instead of "To: bob@example.com". This is more personal and may help avoid spam filters.

The second step, “Setup” (pictured above), is where you enter **Campaign info**. Note that the “Setup” highlighted in the black area at the bottom of the screen (not shown). Remember, you can always go back to this step to change anything you need before sending a blast. Just click on a step name in the black area at the bottom of the screen.

The fields shown with **Red arrows** (pictured above) will be seen in the recipient’s email:

- **Email subject** – This is one of the most important items in the blast. A good, versus bad Subject line can make the difference in whether or not a recipient reads the email, versus deleting it.

Email subject

[How do I write a good subject line? • Emoji support](#)

Click on the link, “**How do I write a good subject line?**” (pictured above), for suggestions.

- **Preview text** – In many (*but not all*) email clients, this line will appear after the subject line. Write a compelling follow-up line, realizing that it may, or may not be seen.
- **From Name** – This name will appear at the bottom of the blast, as the sender. Project Onward blasts use the name, “Project Onward.”
- **From email address** - This email address will appear as “**From**” email address for the blast. A “**Reply**” from a recipient will be sent to this address. Project Onward blasts use **info@projectonward.org** as the “From” address.

Leave the boxes on the right of the screen (pictured above - “Use Conversations...” and “Personalize the “to” field”) un-checked. These are options for advanced users.

Tracking

- Track opens**  Discover who opens your campaigns by tracking the number of times an invisible web beacon embedded in the campaign is downloaded. [Learn more](#)
- Track clicks** Required on free accounts  Discover which campaign links were clicked, how many times they were clicked, and who did the clicking.
- Track plain-text clicks** Required on free accounts  Track clicks in the plain-text version of your email by replacing all links with tracking URLs. [Learn more](#)
- Google Analytics link tracking** Google integration or Shopify must be enabled Track clicks from your campaigns all the way to purchases on your website. Requires Google Analytics on your website or Shopify integration.
- E-commerce link tracking** Track visitors to your website from your MailChimp campaigns; capture order information, and pass that information back to MailChimp. Then you can view purchase details, conversions, and total sales on the reports page. You can also set up segments based on your subscribers' purchase activity. [Learn more](#)
- ClickTale link tracking** Gain insight to how subscribers interact with your email content. Requires ClickTale on your website.
- Track stats in Salesforce** First, enable Salesforce in Account > Integrations.

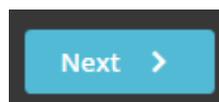
Social media

- Auto-tweet after sending** [Connect To Twitter](#)
- Auto-post to Facebook after sending** [Connect To Facebook](#)

More options

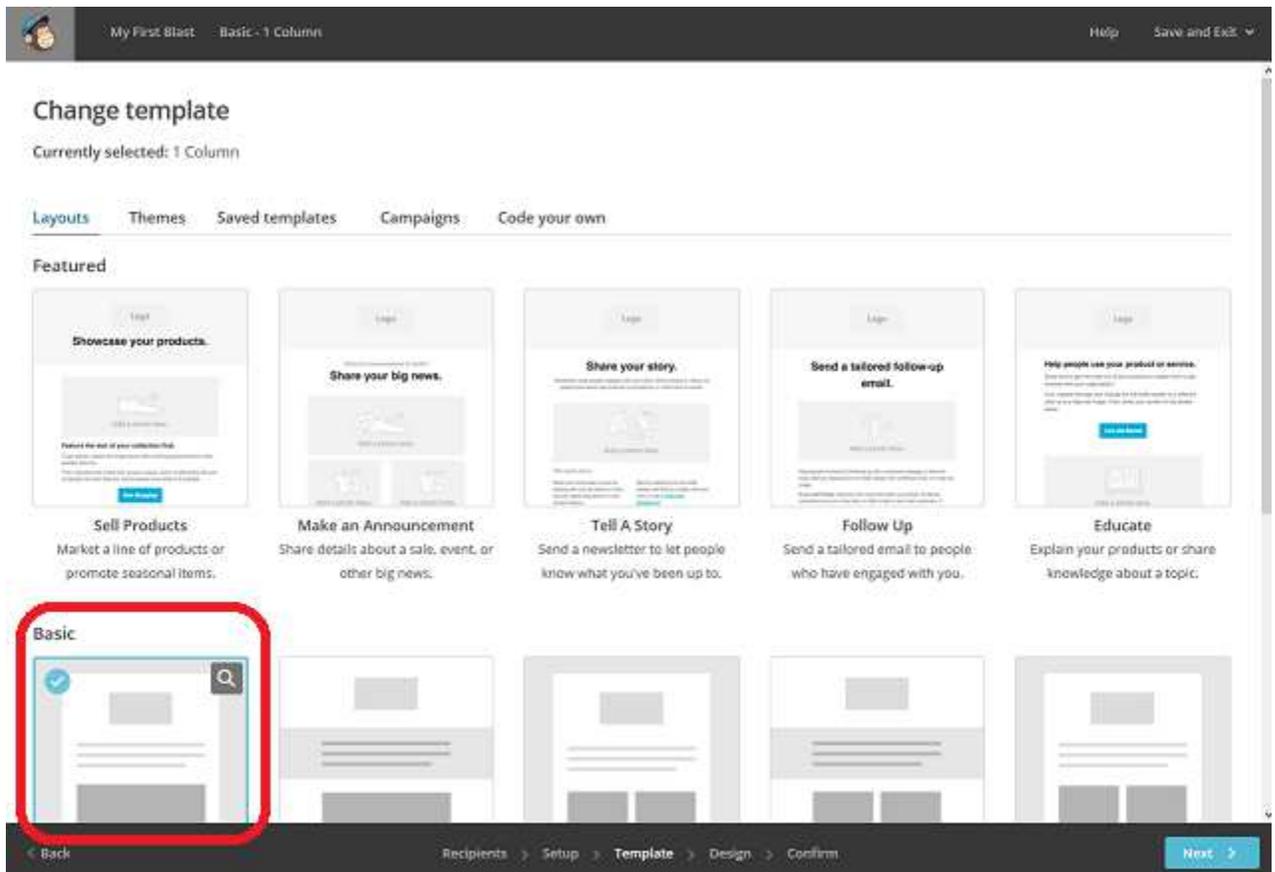
- Auto-convert video** Turn this on, and we'll scan your content for embedded videos (which don't always render properly in email apps), then auto-convert them to use our email-

The bottom half of the “Setup” screen (pictured above) has customization options (for advanced users). For most mailings, you don’t have to change anything. **Use the defaults. (The Red arrows indicate boxes checked by default.)** Leave the other boxes unchecked.



Click the “Next” button (bottom right of the screen) when you are ready.

1.1.4 Step 3 – Template



Project Onward blasts are often built from Saved templates or from previously sent Campaigns. We will show this, further on. But for the purpose of this training, we will start by using a Basic Layout. **Click on the “Basic 1-column Layout”** (as circled in red, in the picture above). Click the **“Next”** button.

1.1.5 Step 4 – Design

The screenshot displays the MailChimp design interface. On the left is a campaign preview window with a 'View this email in your browser' link at the top. The preview shows a placeholder for an image with the text 'Drop an image or Browse', followed by the heading 'It's time to design your email.' and several paragraphs of instructional text. Below the text are social media icons for Twitter, Facebook, and LinkedIn. At the bottom of the preview is a footer with copyright information and links to update preferences or unsubscribe.

On the right is the design editor, which has three tabs: 'Content', 'Design', and 'Comments'. The 'Design' tab is active. A dark tooltip box at the top of the design editor contains the text: 'Drag any of the blocks below into the campaign preview on the left. Go ahead, try dragging a text block to the top of your campaign. Skip these messages'. Below the tooltip is a grid of 15 content blocks, each with a small icon and a label: Text, Boxed Text, Divider, Image, Image Group, Image Card, Image + Caption, Social Share, Social Follow, Button, Footer, Code, and Video.

The template that you chose fills in most the elements (called “blocks”) of a basic email that will meet the standards and pass the programmatic tests to keep your email from being rejected by mail providers.

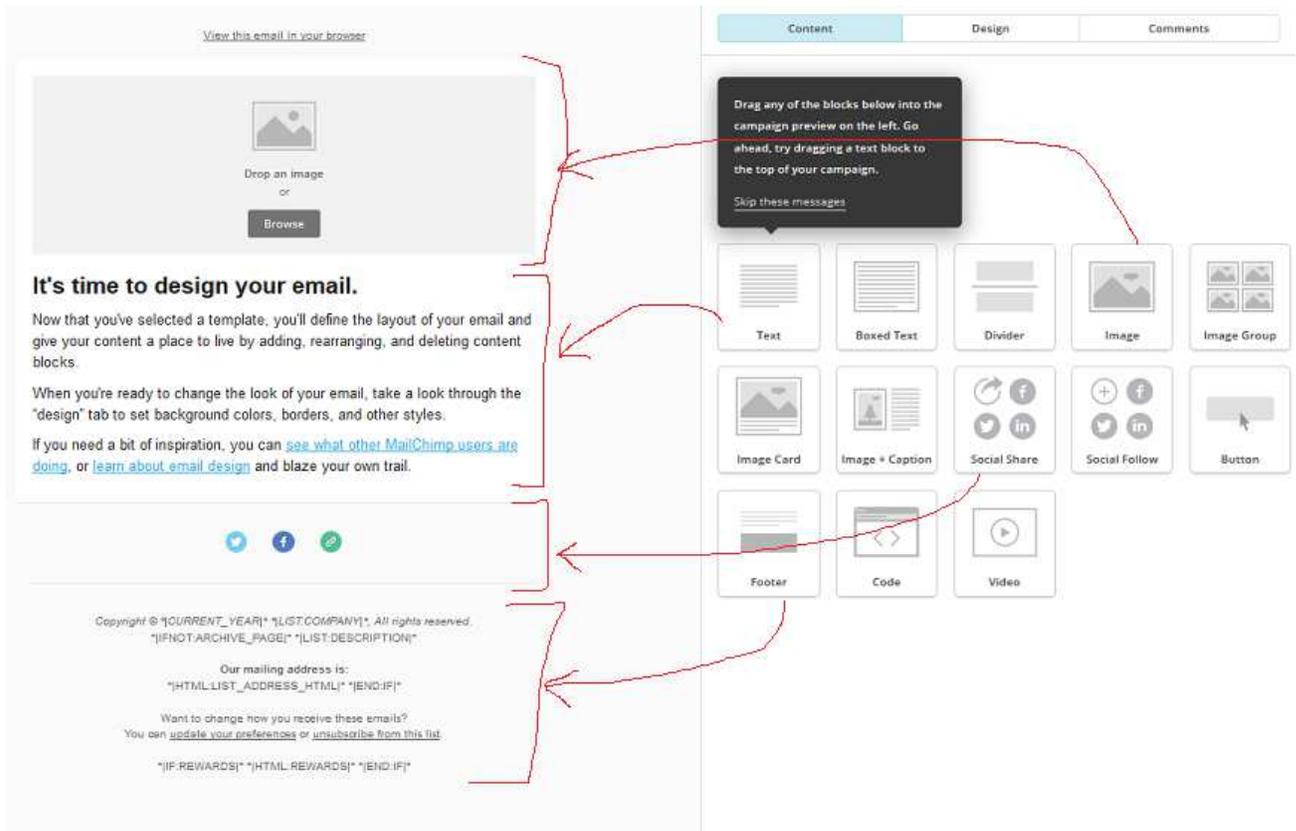
The template (pictured above) is a basic one, which formats your email as follows:

- stack everything in one column
- have an image at the top
- followed by some text
- followed by your social media links (which you setup when you initially register for MailChimp)
- followed by footer information and links (that are also setup when you initially register for MailChimp)

It is important to note that the template formats your email with all the basic information needed to meet the standards for bulk email, as discussed earlier. Most this is in the footer:

The process of Design is modifying the elements for the blast you want to send.

Note that you can also add, change or delete most elements (and blocks of elements), as well as include special formatting (example: a section that has multiple images.)

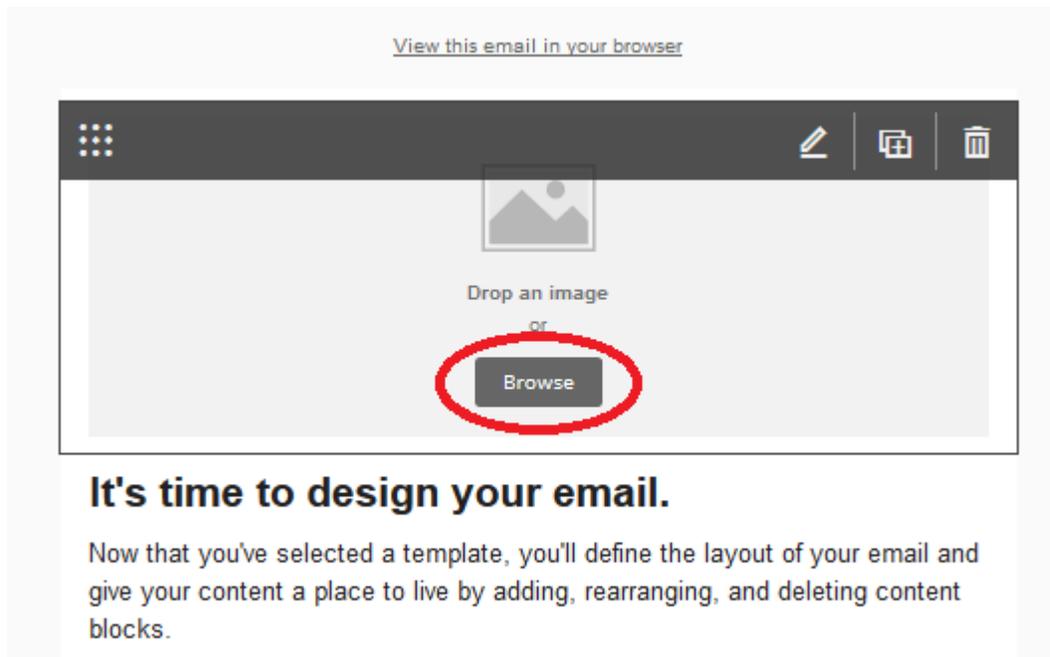


The blocks that you can work with for your design are on the **right** (pictured above).

Your email design is on the **left** (as pictured above).

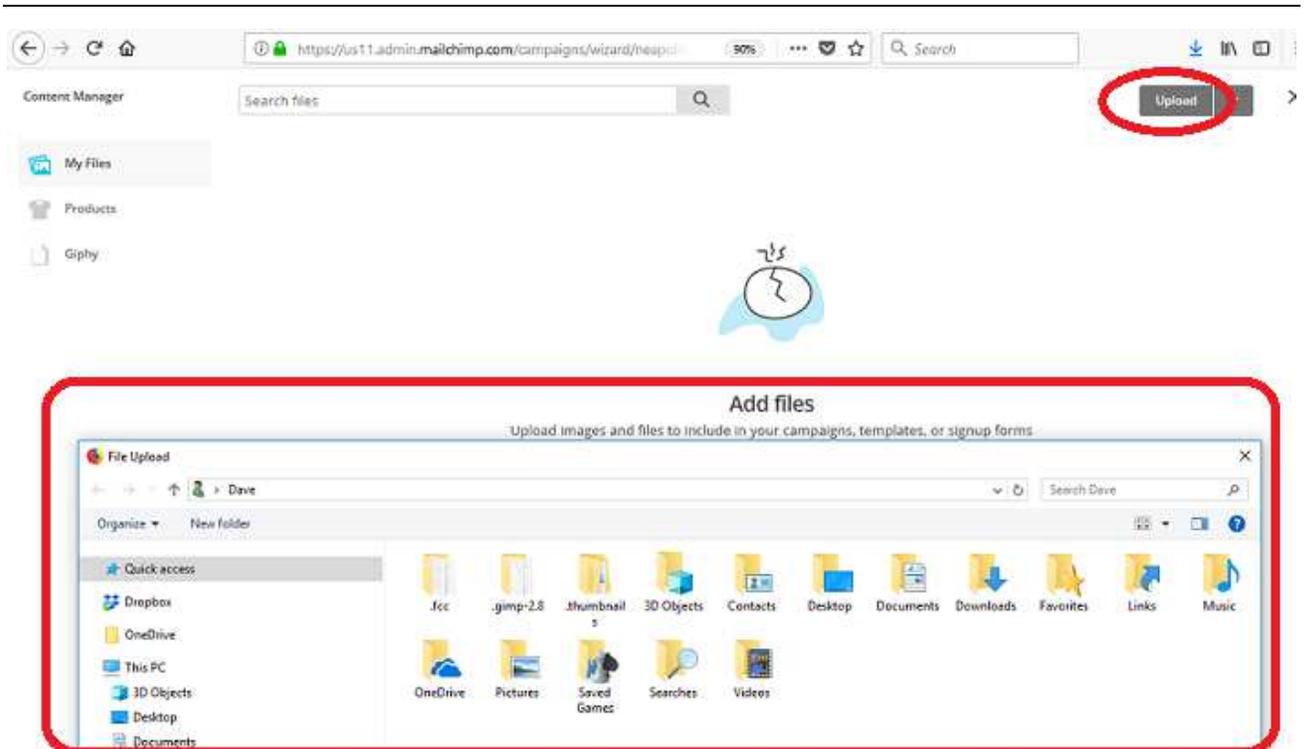
Note that your template has already started you off with some of the blocks (pictured above, **noted in red**).

1.1.5.1 Add an image



When I put my mouse over any part of the design template on the left, a box highlights the block that my mouse is over. I want to put in an image.

So I click on the **“Browse”** button (as pictured above).



If I already have an image that I want to use in my MailChimp library, I could use that. But, since my library is empty, I will upload an image from my computer.

Click on “Upload” in the upper-right of the screen.

Then your File Manager (Finder on a Mac) will pop-up.



Find the image you want to use and click on it.

1.1.5.2 Pay attention to file-size

Later, in the training, we will look at file-size of images and what you can do to make life easier, for yourself, and for your email recipients.

But for now, just be aware that, if you try to upload (from your computer) a dense image (large file size):

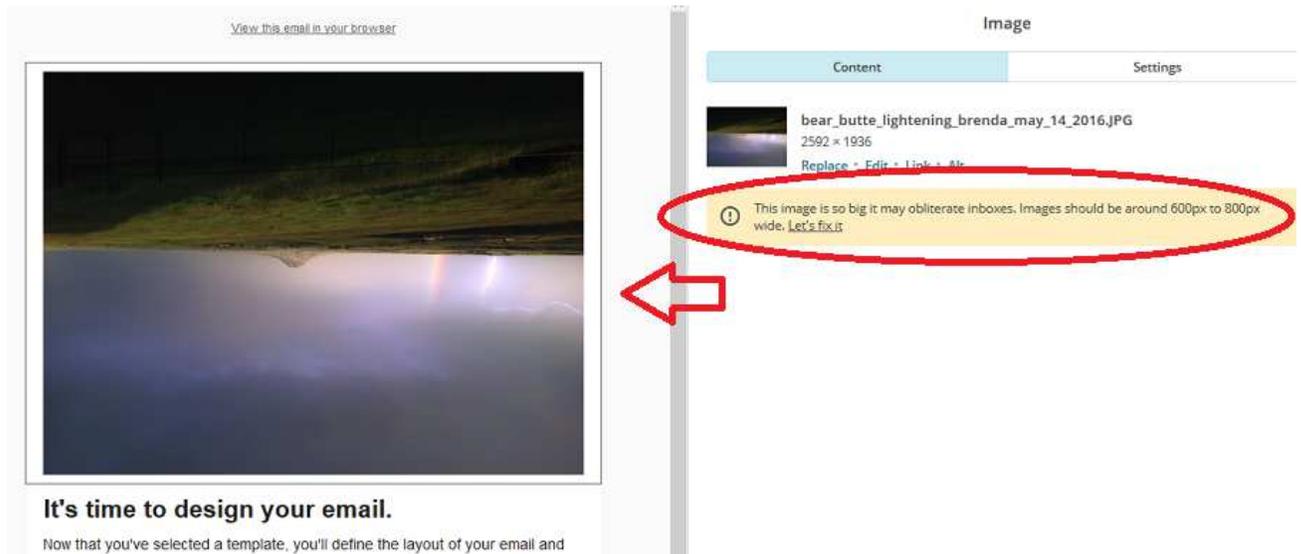
It will take a long time to upload

MailChimp may give you an error message after a while, saying that it couldn't load the file

MailChimp may accept the file, but:

Your email recipients may have to wait a long time for one picture to load (they usually give up, and delete the email)

1.1.5.3 Making changes to images

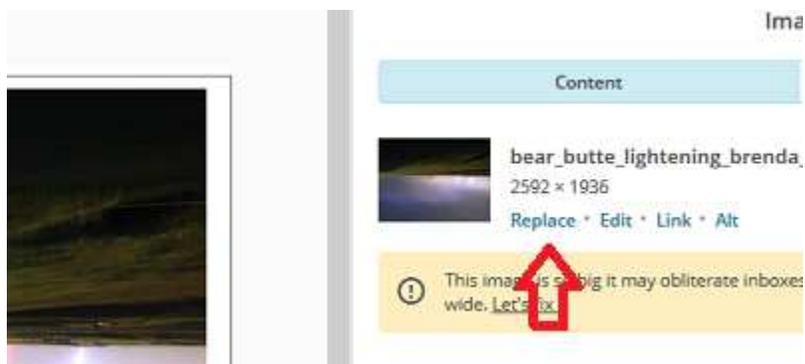


Whoaa! What happened? (pictured above)

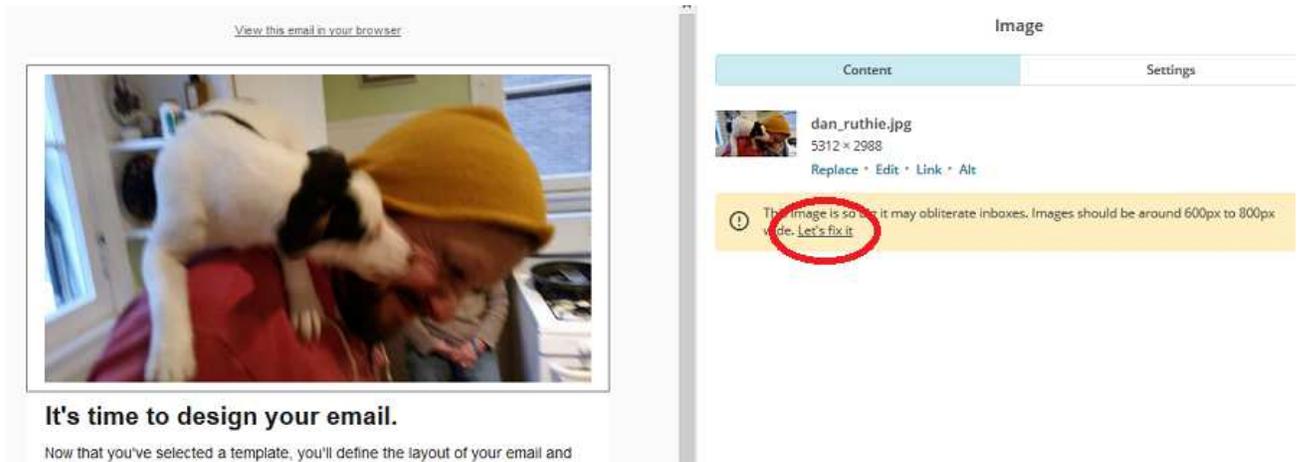
I could fix the upside-down image in MailChimp.

Note that MailChimp is yelling at me about using an image that is too dense (too big). I could also fix that in MailChimp.

But, instead, I will use another image.



I just click on "Replace"

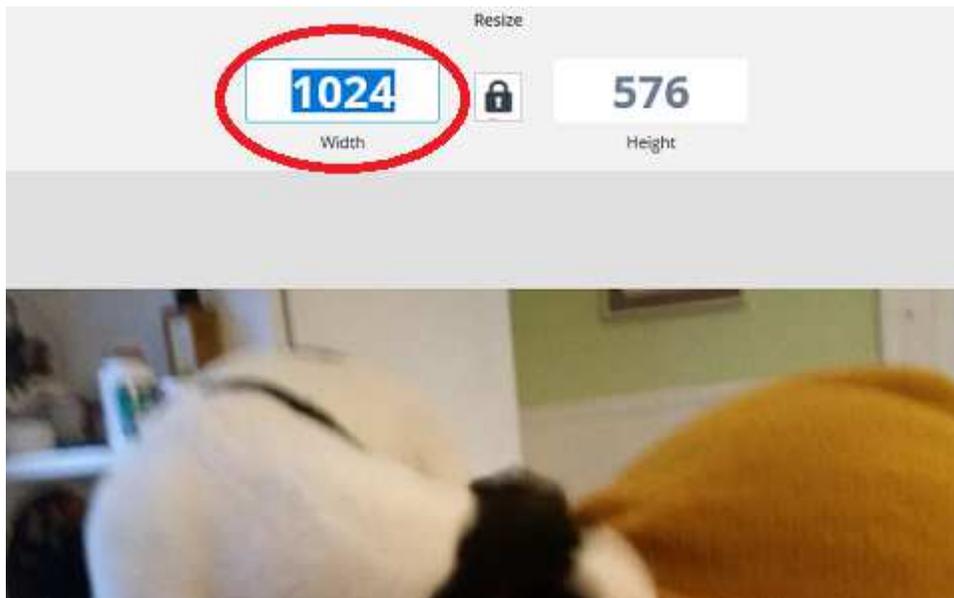


Ok. I will use this image.

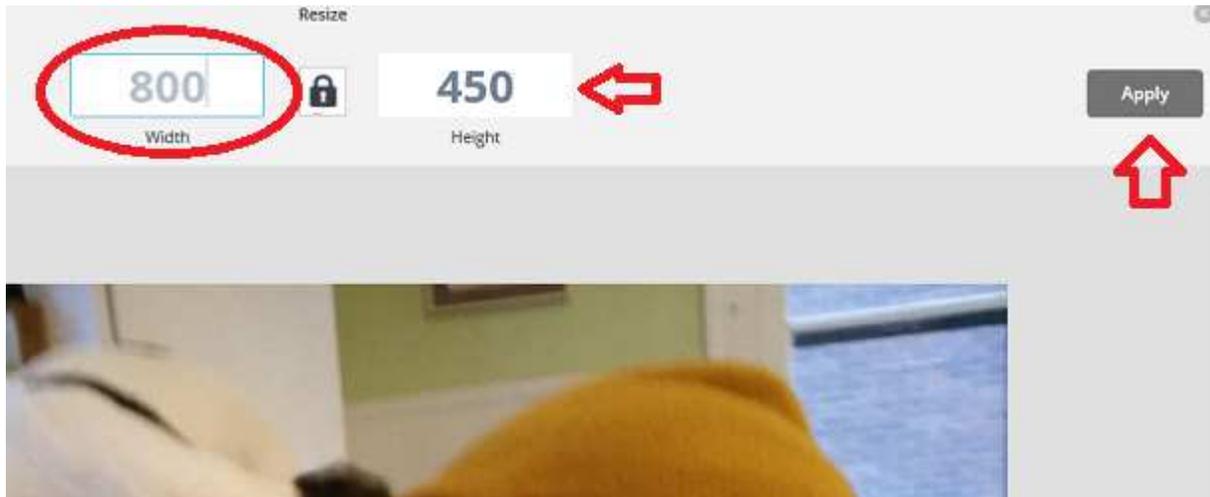
But it is still too big (note on the right in the picture above).

The picture doesn't look too big in the MailChimp screen, but if I send this in an email, it will take forever to load, or even crash an inbox. *Needless to say, bulk email recipients aren't going to wait. Worse yet, they will hate your for filling-up their inbox.*

Click on the *Let's fix it* link (red circle, above).



The numbers are pixels. MailChimp recommends images that are a maximum of 800 x 600 pixels, or smaller. (This is a ballpark range – it doesn't have to be exact).

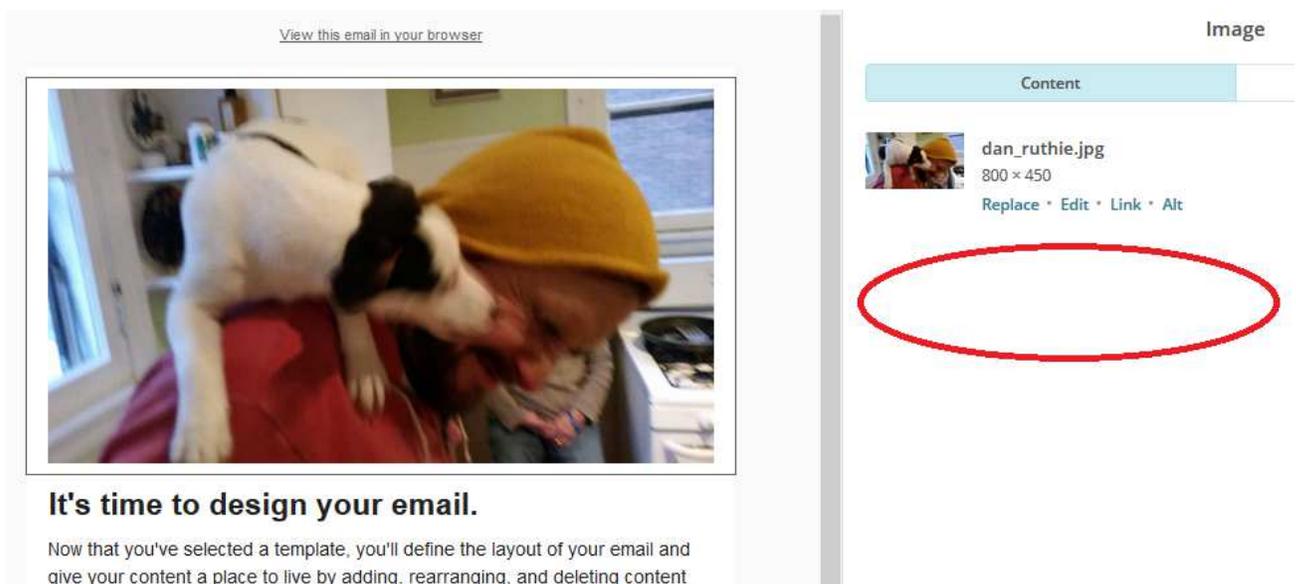


I just type-in **800** for the width (**red** circled number above).

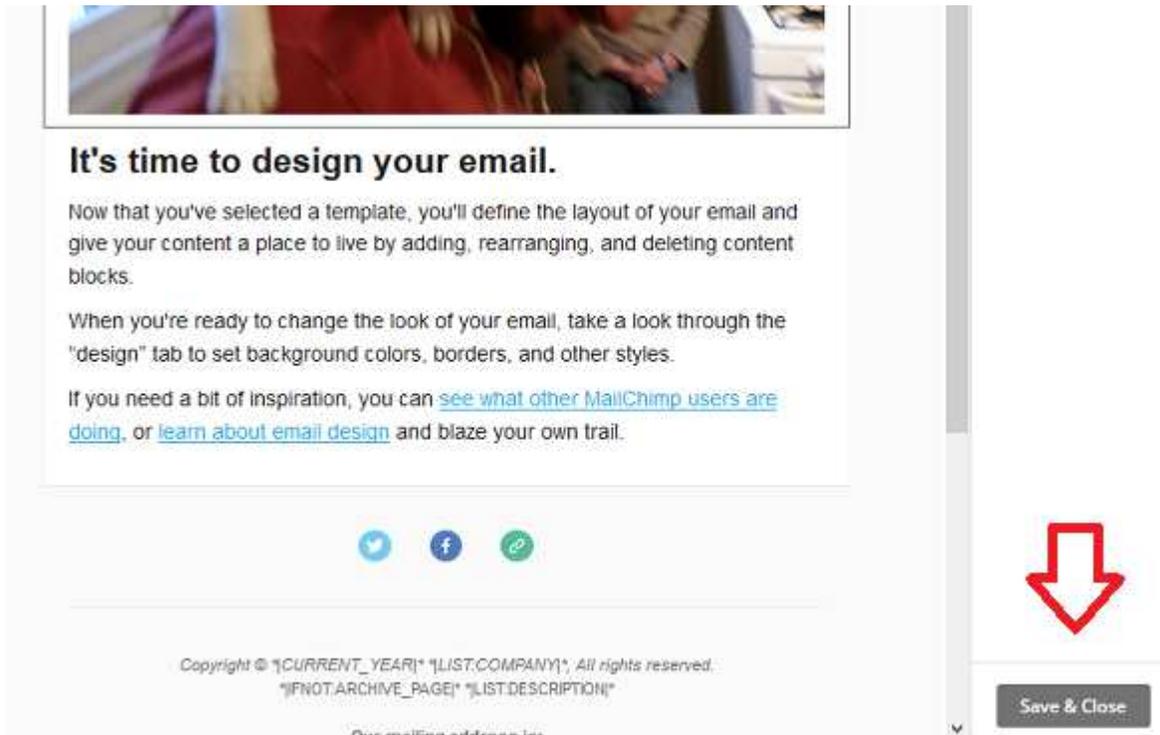
Note that the other number (height) changes to keep the proportions correct.

Then I click on the “Apply” button in the upper right.

Then I click on “Save” in the upper right.



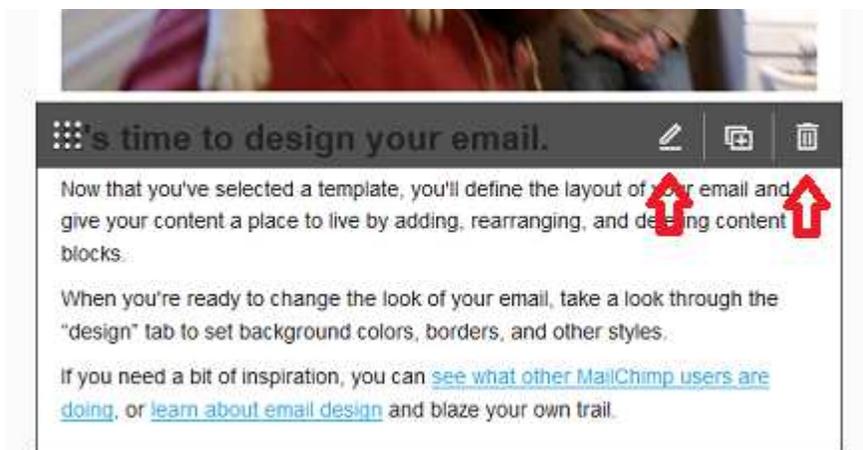
Voila! The nasty message is gone. (pictured above) You don't see the difference, but your email recipients will experience *Nervana*.



Don't forget to click on "Save and Close" (on the right side, as pictured above).

This Saves your changes for the block.

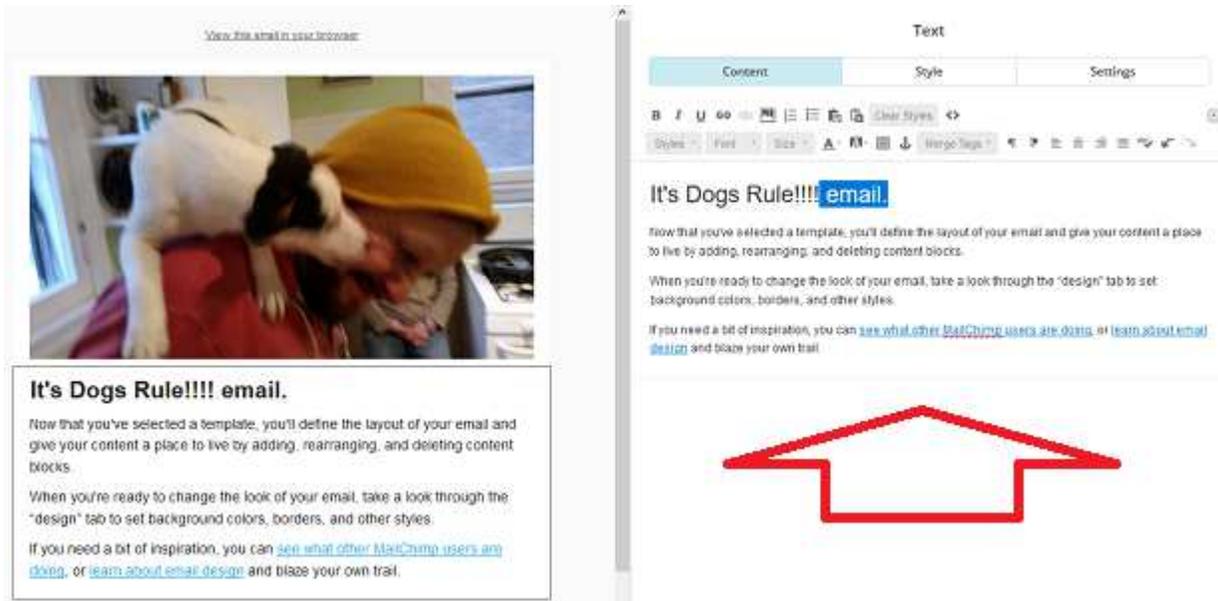
1.1.6 Editing a Text block



I put my mouse over the text, and the outline for the Text block appears (pictured above).

*Note that, in the upper-right of the block, I can Delete the whole block (by clicking on the **trash can** icon). I don't want to do that, but I could.*

Instead, I will click on the *pencil* icon (pictured above).



I do all my editing of text on the right side (red arrow, above).

I highlight text, use icons for making things **bold**, changing fonts, etc., just like in a Word Processor.

Asdf

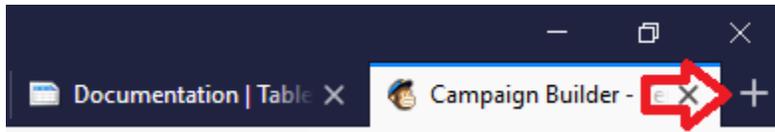


When I want to Save my changes, I click the “Save & Close” button (on the bottom of the right side, as pictured above).

Commercial Break

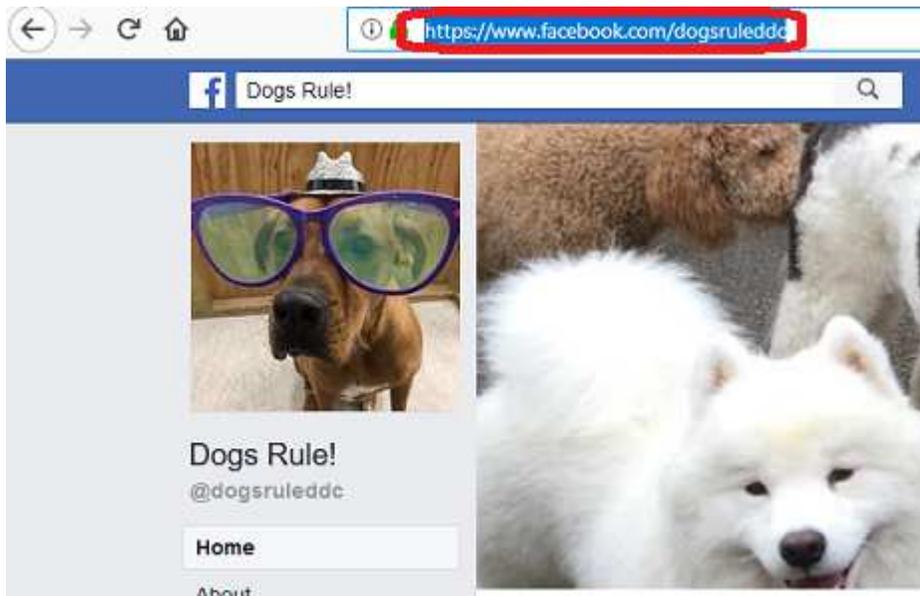
Remember – Save Early, Save Often

1.1.7 Put-in a link



Say, I want to link to a website.

First, I open a tab in the upper-right of my browser (using the “+” at the top of the browser) and go to the website (pictured above). (Note that different browsers look different.)

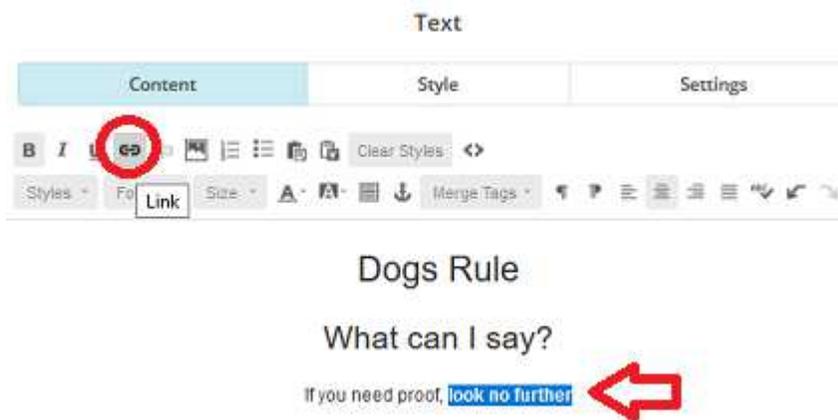


I highlight the URL (found at the top of the browser, as pictured above).

I Copy it - **Ctrl+C** (for Copy) – **Cmd+C** on a Mac.

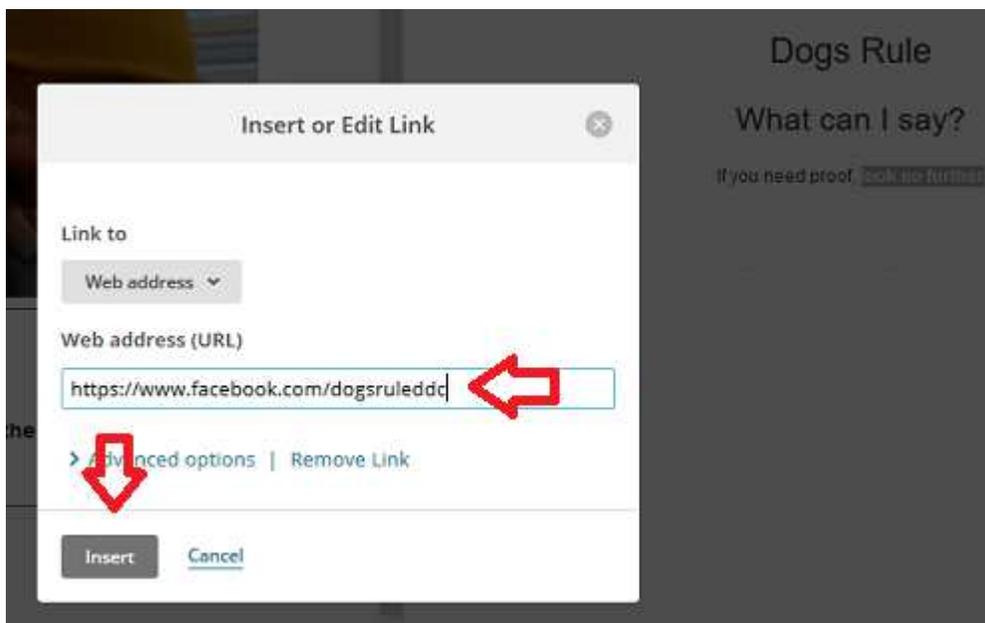


Then I go back to the MailChimp tab in my browser (as pictured above).



I am now back in my MailChimp session.

I highlight the text in which I want to put the link, and click on the “link” icon (circled in red, above).

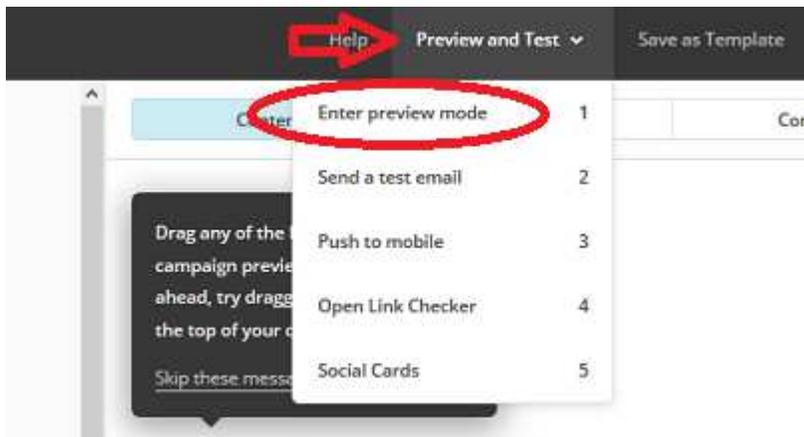


I PASTE the URL into the field in the dialog (using Ctrl-V, Cmd-V on a Mac).

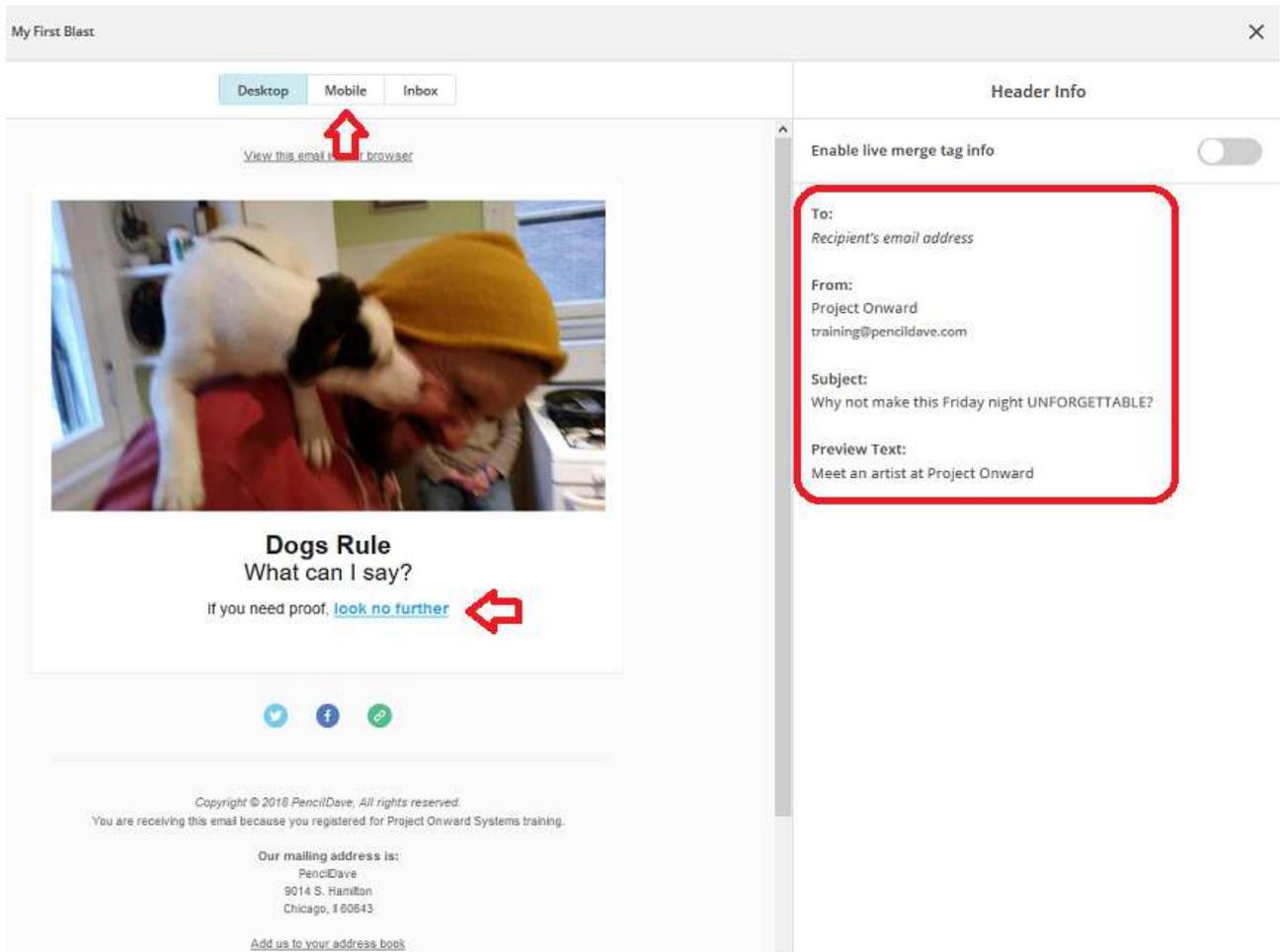
Then I click on the “Insert” button.

(Click on the “Save & Close” button on the bottom, right, to Save your changes.)

1.1.8 What it REALLY looks like – testing my changes



What you see on the left of the MailChimp Design screen is **NOT NECESSARILY WHAT YOU GET**. To see what your email will look like, rather, click on “Preview and Test” in the menu at the top, and then click on “Enter preview mode.”



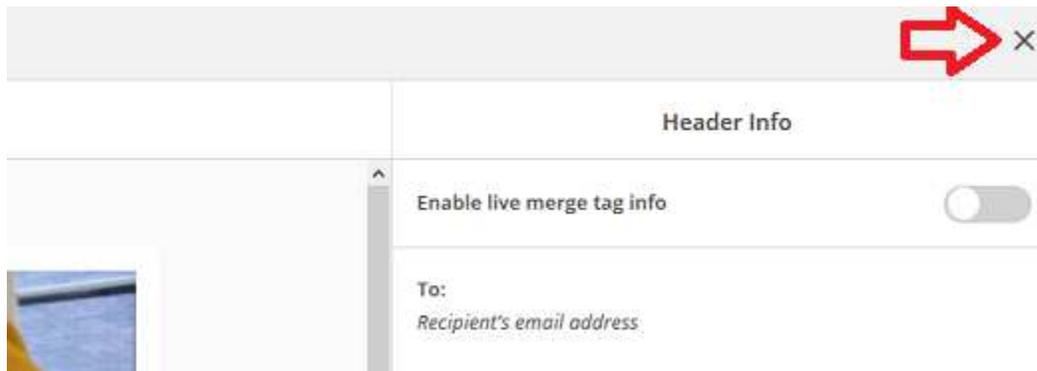
NOW, you can click on the link to see that it works (pictured above).

While you are at it, check the copy and links in the footer.

And check the *From* and *Subject* line on the right.

And, click the “Mobile” button on the top, to see what the email will look like on a smartphone.

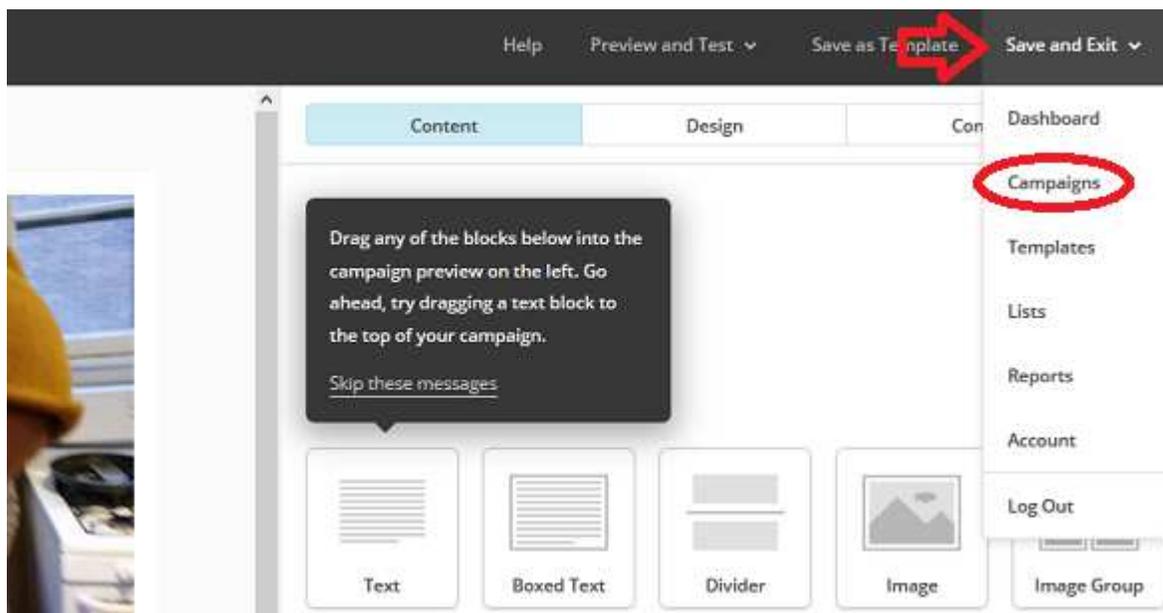
1.1.8.1 How do I get out of Preview Mode?



When you are done looking at the email in Preview Mode,

Click the “X” in the gray area in the upper-right (pictured above).

1.1.8.2 I want to quit, and come back later – How do I get out?



To Save all your work, and get out (without sending anything), in the Design editor,

click “Save and Exit” in the top-right of the menu. Then click on “Campaigns” (as pictured above).

This will save your email as a Campaign, which allows you to find it easily, the next time you use MailChimp to continue working on it.
