



Mailchimp Masterclass

'How to' Guide

Sign Up for an Account

1. Navigate to MailChimp's homepage and click **Sign Up Free**.



2. On the Get Started page, type in your **Email**, **Username**, and **Password**, and click **Get Started!**



Get started with a free account

Create a free MailChimp account to send beautiful emails to customers, contributors, and fans. Already have a MailChimp account? [Log in here](#)

Email

Username

Password

Show

- One lowercase character
- One uppercase character
- One number
- One special character
- 8 characters minimum

3. We'll display a confirmation message. Check your inbox for the account activation email to complete your account setup.

Activate Your Account

After you receive the account activation email from MailChimp Client Services, you can complete the account setup.

Open the account activation email and click **Activate Account**.

On the **Confirm Humanity** screen, check the **I'm not a robot** box, and click **Confirm Signup**.

Create a List

The foundation of great email marketing is a clean, up-to-date list of email contacts, who we call "subscribers." When you create a list in MailChimp, you're prompted to input default information like your From email address and how your subscribers got on your list.

To create a new list in your MailChimp account, follow these steps.

1. Navigate to the **Lists** page.
2. Click **Create List**.



3. Type in the **List details** in the fields provided.
4. When you're finished, click **Save**. That's it!

After you create your list, you'll be able to enter subscribers manually, upload contacts from a CSV file, or import contacts from your customer relationship management (CRM) database.

How to Import Subscribers

A list import has a couple of steps. First, you'll prepare your spreadsheet file of contacts outside of MailChimp, and save it as a CSV file. Next, you'll use our handy List Import Builder to add your contacts to MailChimp.

Prepare for Import

To prepare your file for import, follow these steps.

1. In a spreadsheet program like Excel or Sheets, open your blank worksheet.

	A	B	C
1	Email Address		
2			
3			
4			
5			
6			

2. Create and label a column for email address.

- Next to your **Email Address** column, create and label additional columns for **First Name**, and **Last Name**.

	A	B	C
1	Email Address	First Name	Last Name
2			
3			
4			
5			
6			

Email Address is the only field that we require, but you can repeat this step for any other subscriber data fields you want to include in MailChimp, like phone number, birthday, language, address, or country.

- Paste your contacts' information into the relevant fields in the spreadsheet.

	A	B	C
1	Email Address	First Name	Last Name
3	mwhite@student.hathaway.edu	Maya	White
4	bmwangi@hathaway.edu	Benjamin	Mwangi
5	enemec@hathaway.edu	Elizabeth	Nemec
6	eruiz@hathaway.edu	Edward	Ruiz

- Save the file in CSV format. This option can usually be accessed from the **File** menu in your spreadsheet program, labeled as "Export as .CSV" or "Download as .CSV". Different spreadsheet programs will vary a little bit. If you use another file type, we won't be able to process the file.

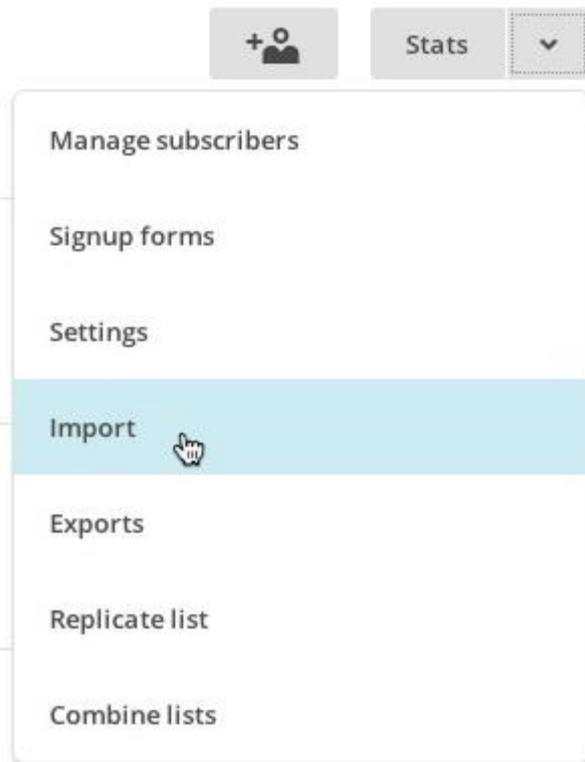
Now that you've completed these steps, you're ready to import the CSV file to your MailChimp list.

Import to MailChimp

You've got your file set up correctly, so now you'll log in to your MailChimp account and use our List Import Builder to upload your file.

To upload your contacts to MailChimp, follow these steps.

- Navigate to the **Lists** page.
- Click the drop-down menu next to the list you want to work with, and choose **Import**.



3. Choose **CSV or tab-delimited text file**.

Where do you want to import subscribers from?

- CSV or tab-delimited text file**
Import contacts from .csv or .txt files
- Copy/Paste from file**
Copy and paste contacts from .xls or .xlsx files
- Integrated service**
Import contacts from services like Google Contacts, Salesforce, Highrise, Zendesk, and more. [Learn more](#)

If your last import was a CSV with the same columns, you can click **Use settings from last import**, which will allow you to skip steps 7-11.

4. Click **Next**.

- Click **Browse** and choose the file from your computer.

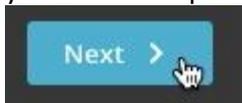
Import from CSV file

Upload file

Hathaway Alumni.csv Browse

Acceptable file types: CSV or [tab-delimited text files](#).

- Check the box next to **I understand that my billing plan may be automatically upgraded**. Your account will only be upgraded if your list import causes your subscriber count to exceed your current billing plan.
- Click **Next** to go to the Import Subscribers step and match the columns in your import file to the fields in your MailChimp list.



- Click **Save** for the Email Address column. We automatically match the column in your import file that contains email addresses to the required Email Address field in your list.

Column Name

Email Address

Save > Skip

Email

lilah@hathaway.edu

- On the second column, check that the column name and field type are correct, and click **Save**. Or click the drop-down menu to select a different field type. To create a new column in your list, choose **New Column Name**.

New Column Name

Phone Number

Field Type

phone

Cancel • Skip

Save >

Phone Number

The editing pane for each column includes the current column name, field type, and example data from your list, for your reference. To exclude a column from the final import, click **Skip**.

10. Repeat **Step 9** for all unmatched columns. You must match or skip all columns to complete your import. After you're finished matching, we'll display a success message.

Hooray! All columns have been matched. Click "Next" below to finish.

11. Click **Next** to review your final import settings.
12. On the **You're all set to import!** screen, review the settings for your import. Be sure to keep the **Subscribed** option selected.

You're all set to import!

Please review your selections below before importing your data.

Import method
File

Importing 8 of 12 columns Edit
[> Details](#)

Categorize the imported subscribers as:

- Subscribed**
Regular subscriber addresses
- Unsubscribed**
Suppressed or blacklisted emails that will be unsubscribed from your list
- Cleaned**
Addresses that have bounced too many times and have been removed from your list

[< Match](#) Import

13. After you've reviewed your settings, click **Import**.

After the import is finished, we'll send your Primary Account Contact an email notification. Be sure to check out the **Lists** page in your account to see all your new subscribers.

How to Auto-Update a List

After you've had some subscribers in your list for a while, their data might change. Luckily, our auto-update import feature helps you update the information of multiple subscribers at once.

Auto-update replaces the list field information with information from your import file, so you can quickly update information from your CRM or other database. Like a regular import, you'll gather your contacts, prepare your spreadsheet, and add them to MailChimp with our List Import Builder.

On the final step of the import, you'll check the box next to **Auto-update my existing list**, and click **Import**. That's it! We'll handle the rest by scanning your list and updating subscriber information.



Auto-update my existing list



If MailChimp finds a subscriber in your import that is already on your list, it can update the subscriber's info for you. This is particularly useful if you have an existing list that you are trying to keep synced with an external list. Choosing this option will make imports on existing lists much slower, so only select it if you have new profile information that you need updated.

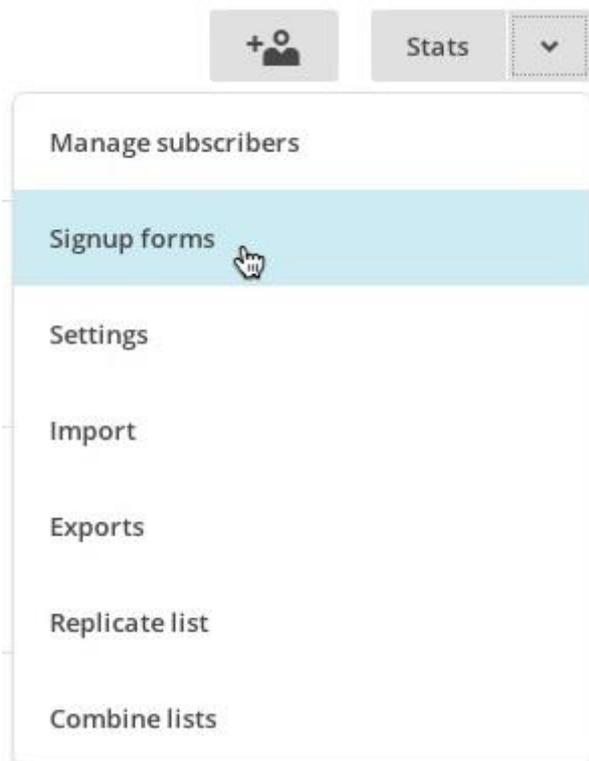
Be careful when you auto-update. You'll need to verify that your import column names match your MailChimp list field names and that no fields are blank. Blank fields overwrite existing subscriber data with blanks, erasing your old information.

Customize Your Signup Form

If you don't have any subscribers yet, don't worry! We'll automatically generate a signup form for your list, which you can post on your website or Facebook page, so you can start collecting subscribers right away. Plus, we give you lots of options to customize the design of your signup form, so it'll fit your brand.

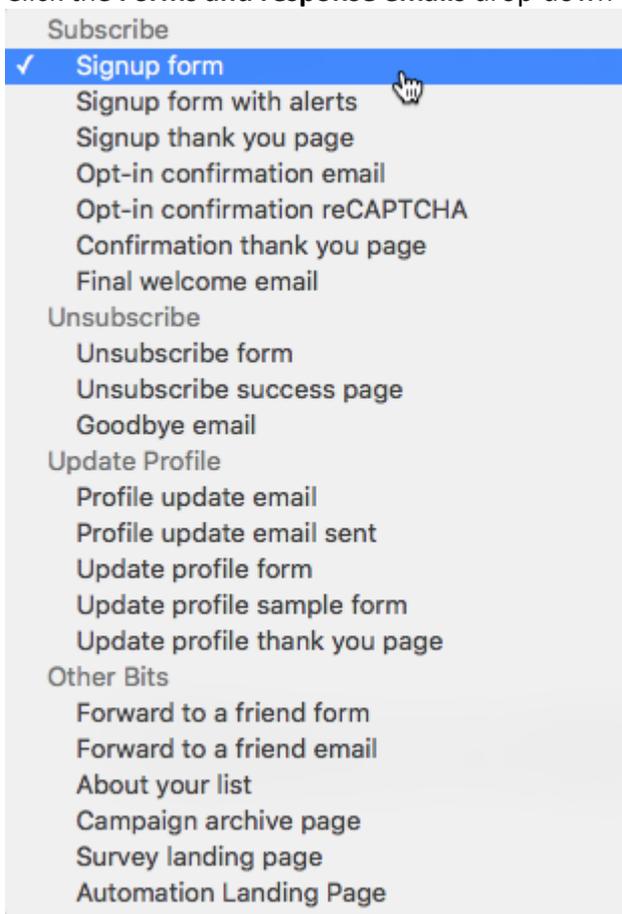
To access the Form Builder and customize your signup form, follow these steps.

1. Navigate to the **Lists** page.
2. Click the drop-down menu next to the list you want to work with and choose **Signup forms**.



3. Select **General forms**.

4. Click the **Forms and response emails** drop-down menu, and choose which form you want to edit.



5. Click the **Design it** tab.



6. Click through the **Page**, **Body**, **Forms**, or **MonkeyRewards** tabs to review the customization options. Use the fields and drop-down menus to make any changes you want to the styles, colors, and fields. We'll save your changes automatically. When you're done, click **Save & Close**. Voila!

For in-depth instructions, read the article [How the Form Builder Works](#).

How the Form Builder Works

The Form Builder is made of three main tabs, **Build it**, **Design it**, and **Translate it**, which you'll use to customize all your forms, signup response emails, and miscellaneous landing pages. Here's a brief overview of how things work.

The Build It Tab

The **Build it** tab is where you'll add structure and content to your signup form and response emails. Use the **Build it** tab of the Form Builder to add or remove list fields, and change field settings.



Manage List and Signup Form Fields

The Design It Tab

The **Design it** tab is where you'll edit the style, color, font, and graphics of your signup form and response emails. You can also edit the page and body layout of your signup form and response emails here.



Any design changes you make here, like changing background color or font, will be inherited by all your other pages and response emails. This helps build brand consistency for all the pages your subscribers will interact with, and saves you some time.

The Translate It Tab

The **Translate it** tab is where you'll translate your signup form and response emails, or customize default text. MailChimp supports more than 50 languages.



Share Your Form

After you design your signup form, you can share it across all your online channels. Just copy your **Signup Form URL** in the Form Builder, and share it anywhere you want!

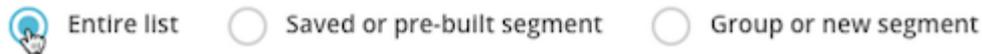
Create a Campaign

1. Navigate to the **Campaigns** page.
2. Click **Create Campaign** in the upper-right corner of the screen to create a Regular Campaign.

To create a Plain-Text Campaign, A/B Testing Campaign, or RSS campaign, click the drop-down menu and select that option.



3. On the **Recipients** step, choose a list from the drop-down menu.
4. Click **Entire list**, or pick a segmentation option. To learn more about segments, read [Getting Started with Segments](#).



5. To proceed, click **Next** or **Setup** in the progress bar.
6. On the **Setup** step, input your **Email subject, From name, and From email address**. Select tracking tools, connect social media, and configure advanced settings from the available options. When you're finished, click **Template** or **Next** in the progress bar.
7. On the **Template** step, select one of the following options to create and add your content.

Select a template

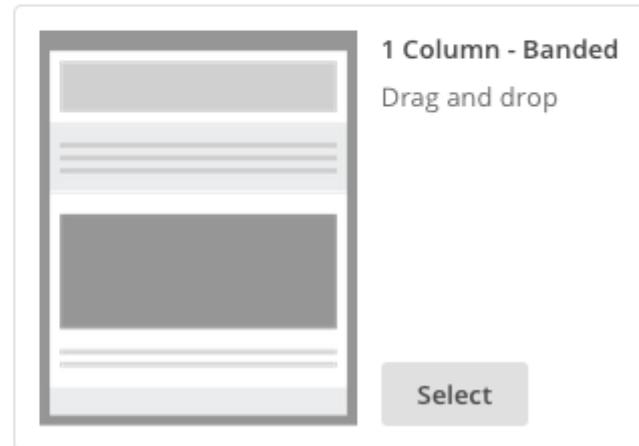
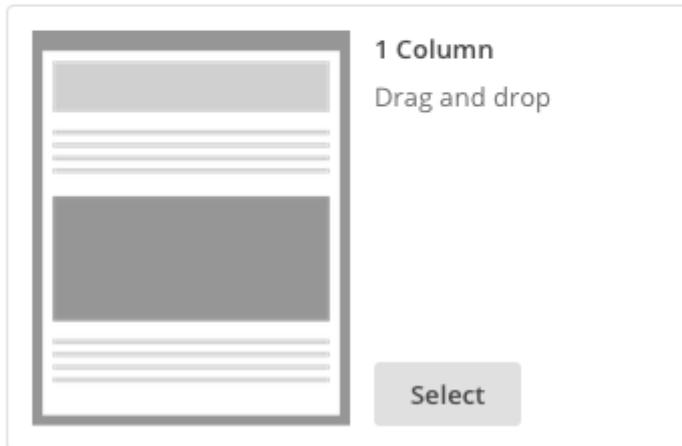
Basic

Themes

Saved templates

Campaigns

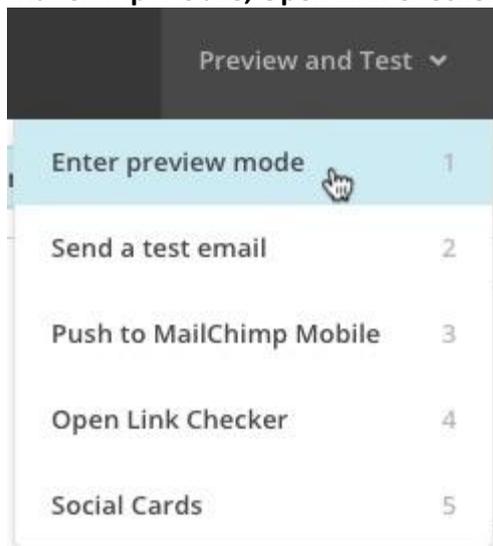
Code your own



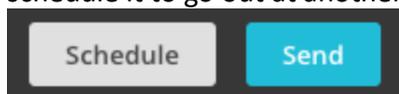
- On the **Basic** tab, you can choose from flexible Drag and Drop templates.
- Click **Themes** to select from our predesigned layouts.
- The **Saved templates** tab allows you to select from any templates you've previously saved or imported.
- **Campaigns** lets you reuse one of your recently sent or draft campaigns for your current campaign. The **Recently Sent** section displays up to 25 campaigns most recently sent from your account. Only draft campaigns with content appear in the **Drafts** section.
- The **Code your own** tab displays three ways to import a campaign layout from outside of MailChimp: Paste in code, Import from Zip, and Import from URL.

8. In the **Design** step, you'll input and customize your campaign content.

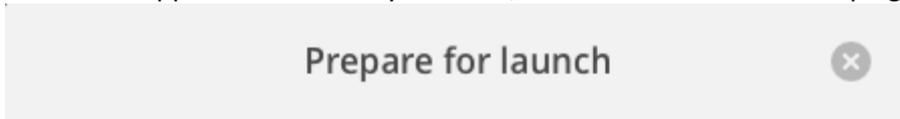
9. Click the **Preview and Test** drop-down menu to **Enter preview mode**, **Send a test email**, **Push to MailChimp Mobile**, **Open Link Checker**, or customize **Social Cards**.



10. Click the **x** in the top-right corner of the screen to return to the **Design** step.
11. Once you're satisfied with your design, click **Next** or **Confirm** in the progress bar.
12. Review the Pre-Delivery Checklist on the **Confirm** step. Click **Resolve** to navigate directly to the step to fix any errors that may appear. To make other changes, click the **Edit** button to return to a step. You can also view and edit the automatically generated plain-text version of your campaign by clicking the **Edit** button in the **Plain-Text Email** section of the checklist.
13. When you've finished testing your campaign, you can either send the campaign immediately, or schedule it to go out at another time.



14. If you're ready to send the campaign to your subscribers, click the **Send** button. The **Prepare for launch** modal will appear. To confirm your send, click **Send Now**. Your campaign is on its way!



You're about to send a campaign to:
Hathaway Store
22,815 subscribers

This is your moment of glory.

Send Now

[Cancel](#)

Tips for Designing Your Campaign

When you send a campaign through MailChimp, there are a few things you'll want to keep in mind while creating your content.

- Each recipient on your MailChimp list is hidden from all the other recipients. We deliver a completely separate copy of your email to each recipient, so you can personalize your content for everyone. This also allows us to track clicks and opens.
- Be sure to test your campaign before you send to your entire list. For the best possible result, we recommend sending tests to all the popular web-based email services, like Yahoo!, Hotmail, and Gmail. You can also use the Inbox Preview tool to preview how your email will appear in multiple clients.
- MailChimp automatically includes both an HTML version and a plain-text alternative version for each of your subscribers. This ensures your subscribers view your content as expected, regardless of the email client or program they use.
- MailChimp is designed to send email campaigns that contain HTML code and plain-text content. It's possible to use other types of code, but we advise against it. For example, Flash is not supported in most email programs. The best way to send Flash content is to use an image in your campaign, and link the image to the Flash content hosted on an external server or website.

View Your Campaign Reports

You've clicked **Send**, but it's not over yet! A key component of successful email marketing is tracking subscriber engagement, so you can provide more of what your subscribers want and less of what they don't.

The next time you login to MailChimp after sending a campaign, you'll see how many subscribers opened, clicked, or unsubscribed from your recent campaigns, right on your Dashboard. Click **Reports** for more detailed information, and to download, share, or print your campaign reports.

MailChimp's open- and click-tracking tells you how many people looked at your campaign, which links they clicked, and other information, like their geolocation. Integrate your Google Analytics account with MailChimp or connect your CRM database for more in-depth reporting.

Information adapted from www.mailchimp.com

Need help setting up your Mailchimp account? Glow Virtual Assistants can help – contact us at info@glowva.co.uk



Supporting your business to shine