



Creating Email Messages with MailChimp

Revision History

Date	Version	Description	Author
3/25/16	0.01	Rough Draft	H4B / C. Carter

Issues List

Date	Version	Description	Resolution	Open/Closed



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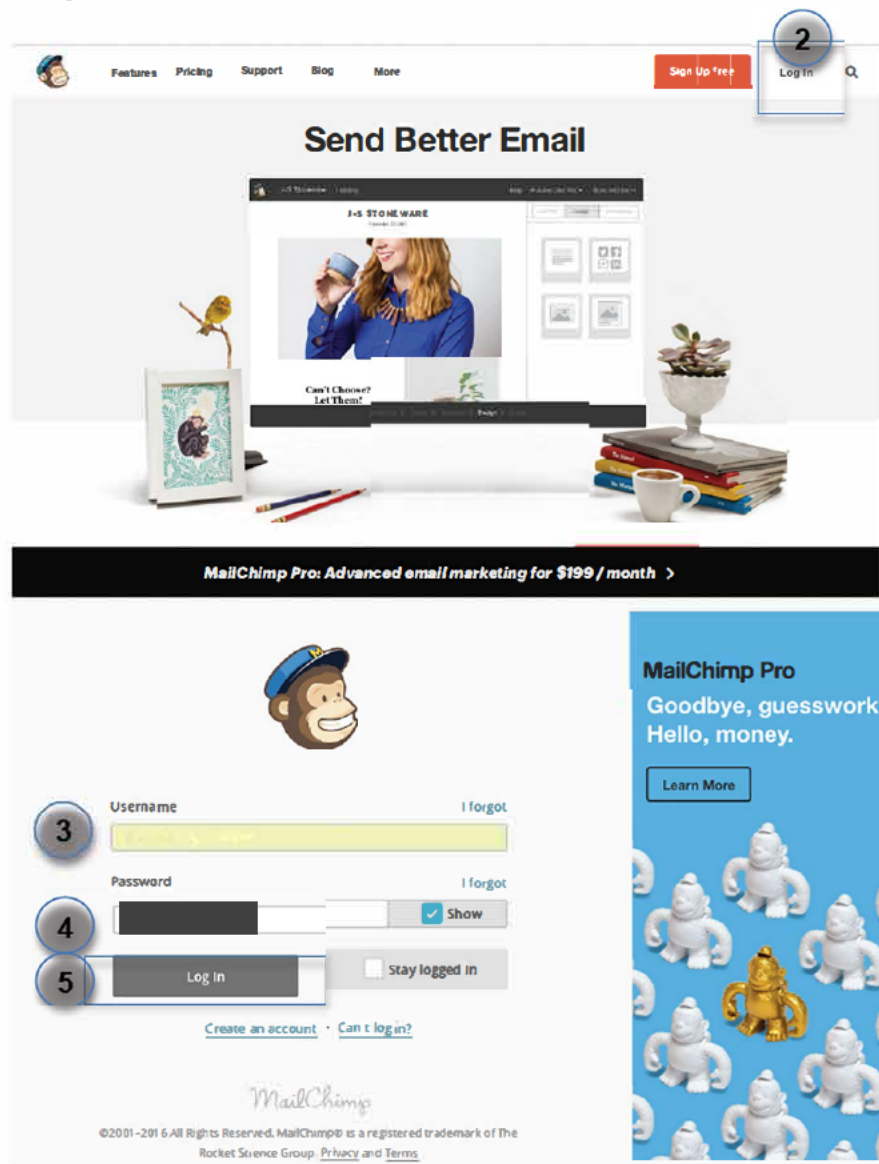
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Login



The image shows the MailChimp Pro login page. At the top, there is a navigation bar with links for Features, Pricing, Support, Blog, and More. A red 'Sign Up Free' button and a 'Log In' button are in the top right corner. A circled '2' highlights the 'Log In' button. Below the navigation bar is a large banner with the text 'Send Better Email' and a central image of a woman holding a cup. Below the banner is a black bar with the text 'MailChimp Pro: Advanced email marketing for \$199 / month >'. The main content area features the MailChimp monkey logo, a login form, and a promotional banner for MailChimp Pro. The login form has fields for Username and Password, both with 'I forgot' links. A 'Log In' button is highlighted with a circled '5'. Below the login form are links for 'Create an account' and 'Can't login?'. At the bottom, there is a copyright notice: '©2001-2016 All Rights Reserved. MailChimp® is a registered trademark of The Rocket Science Group. Privacy and Terms'.

2

Sign Up Free Log In

Send Better Email

MailChimp Pro: Advanced email marketing for \$199 / month >

MailChimp

MailChimp Pro
Goodbye, guesswork.
Hello, money.
Learn More

Username I forgot

Password I forgot

Log In Stay logged in

Create an account Can't login?

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1. In your web browser, go to www.mailchimp.com.

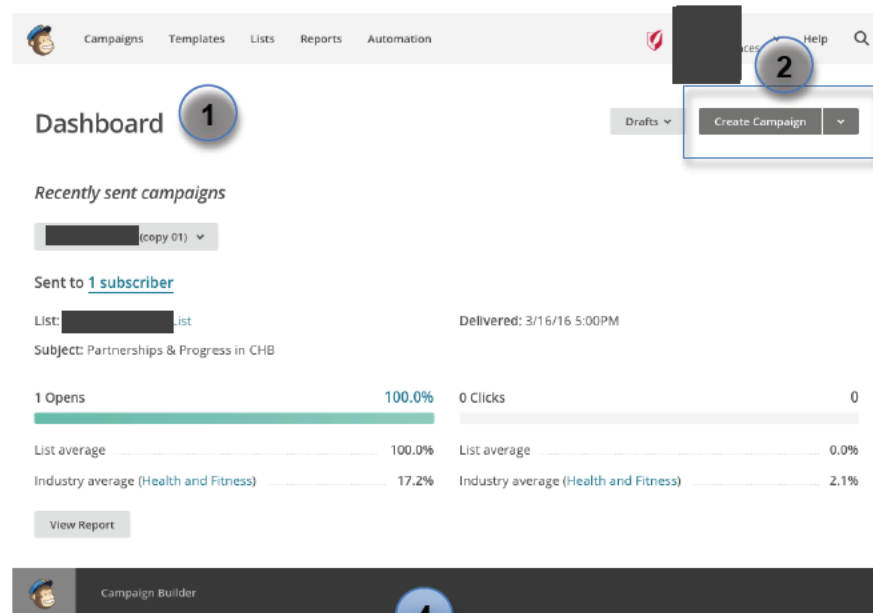
2. Click on Log In in the top right corner.

3. Enter Username:

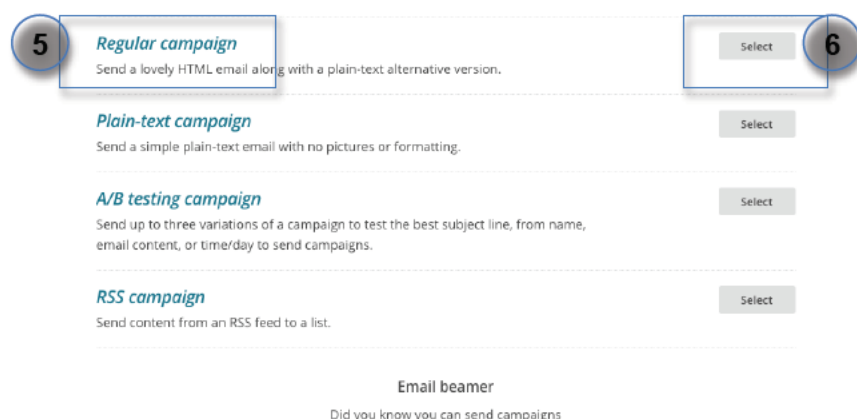
4. Enter Password:

5. Click the Log In button.

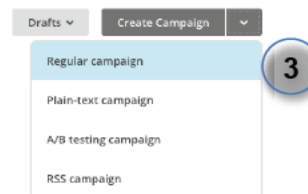
Create a New Email Message



Select A Type Of Campaign To Send:



1. After logging in, you will see the MailChimp Dashboard.
2. In the upper right portion of the page you will see the **Create Campaign** button with a down arrow button beside it.
3. Click the **down arrow** and select Regular campaign.

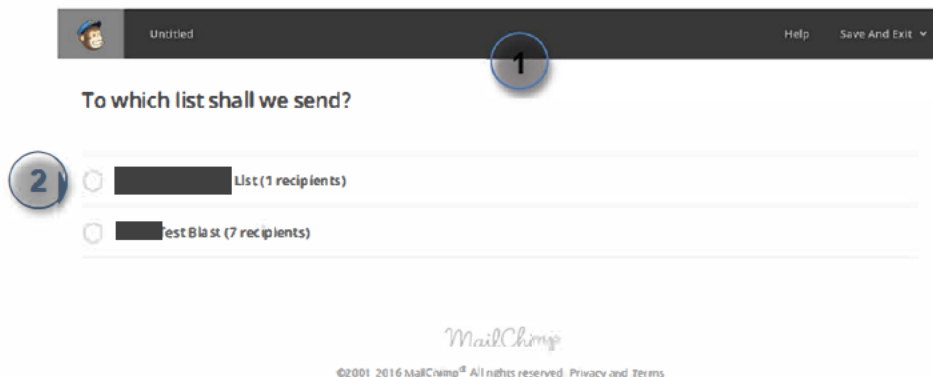


Alternatively, you may click the (2) **Create campaign** button, which will take you to the (4) "Select a Type of Campaign To Send" page.

Click on (5) **Regular campaign**, or else click the (6) **Select** button to the right of Regular campaign.

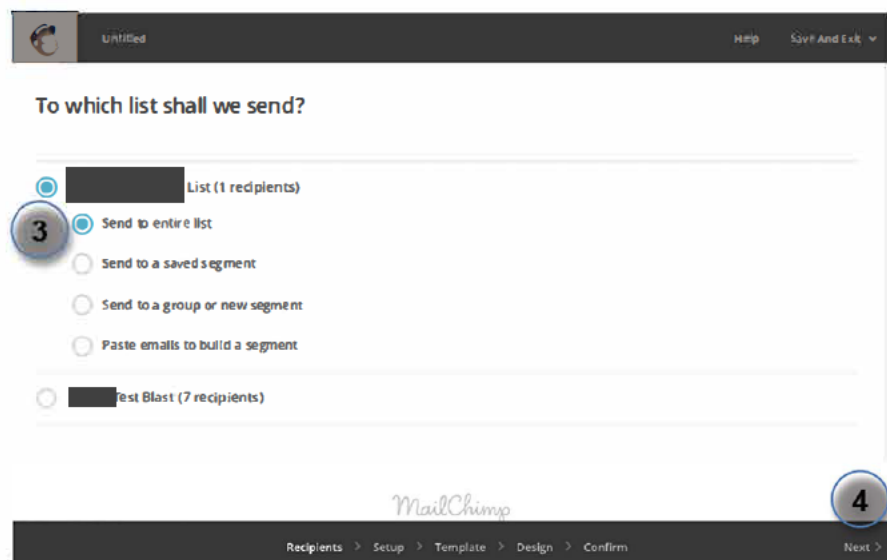


Select Recipients



1. You will now see a screen that asks, "To which list shall we send?"
2. Select xxxxxxx List (1 recipients).

The only recipient on this list is [redacted] [.com](#).



3. From the options that become available after you select xxxxxx List, select **Send to entire list**.
4. Click **Next** in the bottom right corner.

Enter Campaign Information

Untitled
Help
Save And Exit

Campaign info

1 Name your campaign

Internal use only. Ex: "Newsletter Test84"

2 Email subject 150 characters remaining

How do I write a good subject line? • Email support

3 From name 90 characters remaining

Use something subscribers will instantly recognize, like your company name.

4 From email address

5 ☐ Use Conversations to manage replies Paid accounts only

When enabled, we'll send a special reply-to address for your campaign. We'll filter out "office" replies, then thread conversations into your subscribers' profiles and display them in reports.

6 ☐ 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|* will show "To: Bob Smith" in the email instead of "To: bob@example.com". This is more personal and may help avoid spam filters.

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 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 must be enabled.

Track clicks from your campaigns all the way to purchases on your website.

☐ **eCommerce360 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.

☐ **Goal tracking** Paid accounts only

Track where subscribers go on your site, then trigger automations or segment your list based on what pages they've visited.

☐ **Auto tweet after sending**

[Connect to Twitter](#)

☐ **Auto post to Facebook after sending**

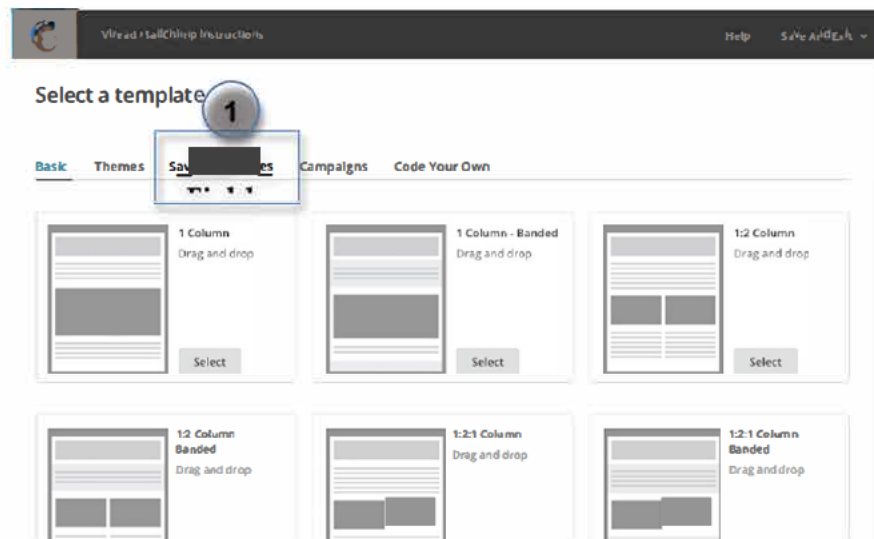
[Connect to Facebook](#)

More options

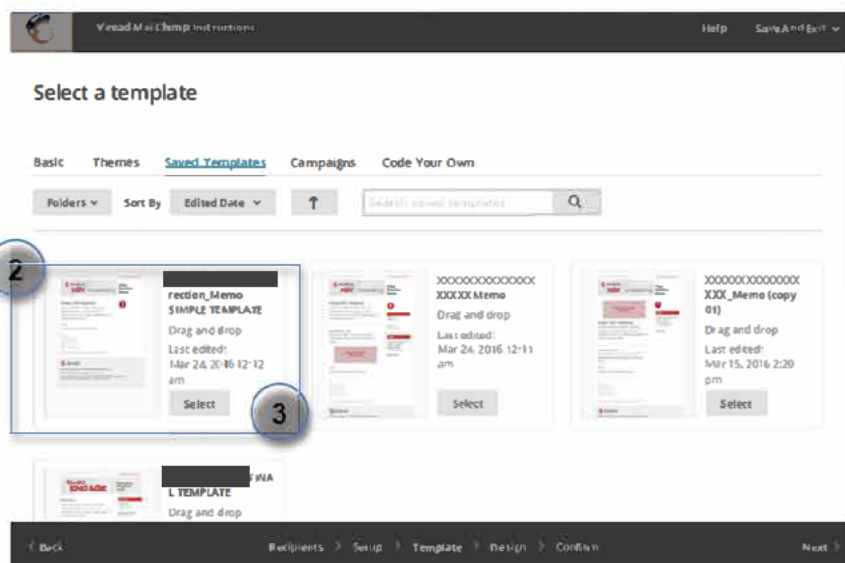
< Back
Recipients >
Setup >
Template >
Design >
Confirm
Next >

- 1. Name your campaign:** This name will identify this particular email in MailChimp but will not appear anywhere on the email once it is blasted out.
- 2. Email subject:** [tips on appropriate subjects lines needed here]
- 3. From name:** do not change.
- 4. From email address:** do not change.
- 5. Use Conversations to manage replies:** ignore.
- 6. Personalize the "To" field:** ignore.
- 7. Tracking, Social media, and More options:** ignore.
- 8. Click Next** in the bottom right corner.

Select a Template

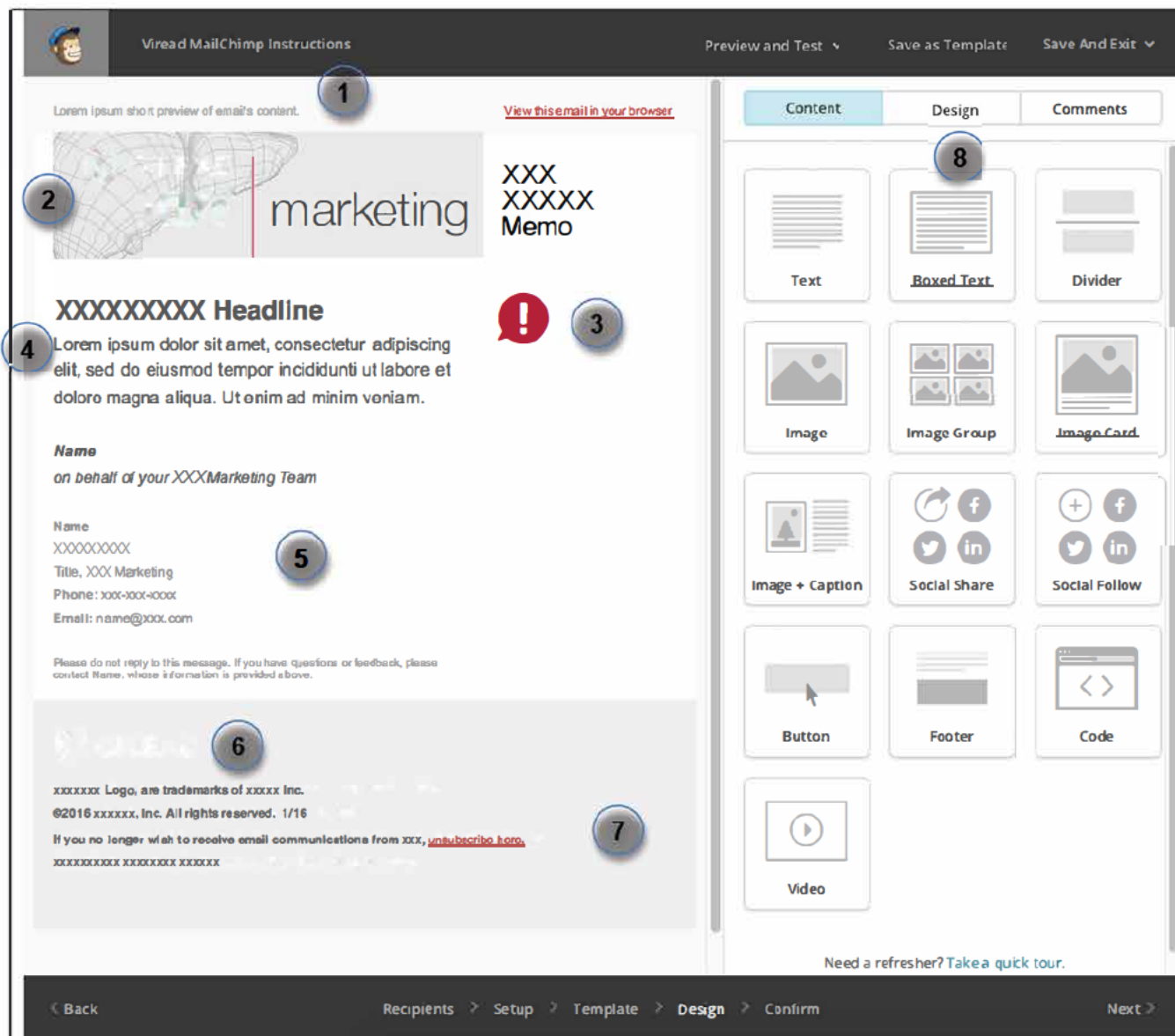


1. On the Select a template screen, click **Saved Templates**.



2. From the available saved templates, find **XXXXXX Memo SIMPLE TEMPLATE**.
3. Click the **Select** button in the box containing **XXXXXX Memo SIMPLE TEMPLATE**.

Edit Your Email: Overview



Viread MailChimp Instructions

Preview and Test ▾ Save as Template Save And Exit ▾

1 View this email in your browser

2 marketing

3 XXX XXXXX Memo

4 XXXXXXXX Headline

5 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam.

Name
on behalf of your XXXMarketing Team

Name
XXXXXXXXXX
Title, XXX Marketing
Phone: xxx-xxx-xxxx
Email: name@xxx.com

6 Please do not reply to this message. If you have questions or feedback, please contact Name, whose information is provided above.

7

8

Content Design Comments

Text Boxed Text Divider

Image Image Group Image Card

Image + Caption Social Share Social Follow

Button Footer Code

Video

Need a refresher? Take a quick tour.

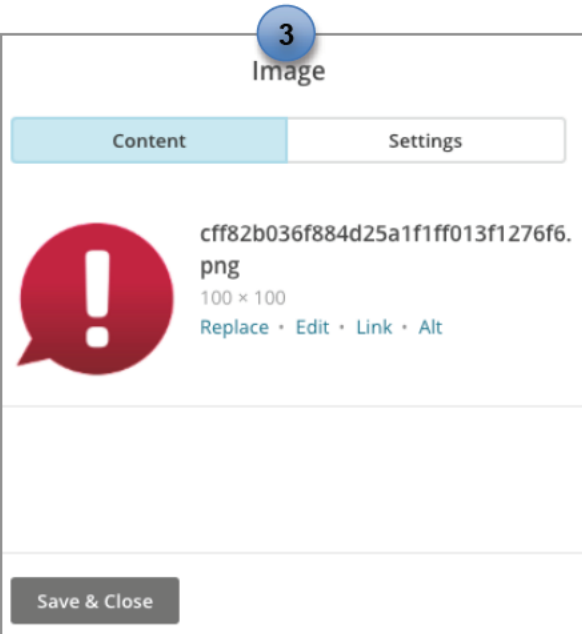
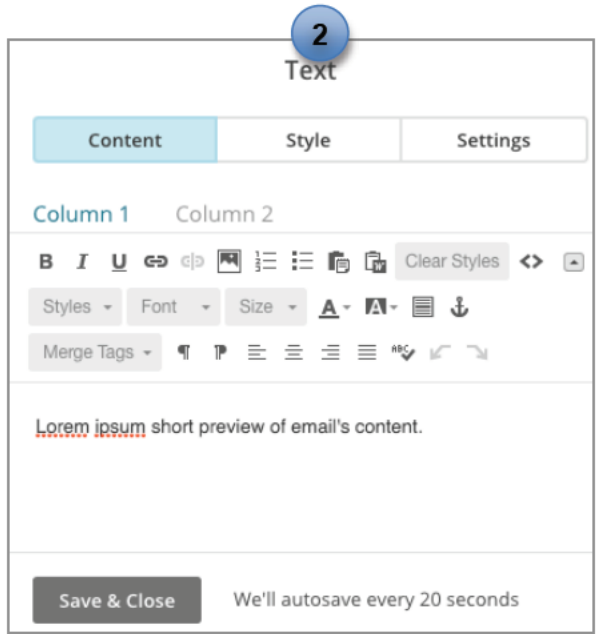
◀ Back Recipients > Setup > Template > Design > Confirm Next >

Following are the elements that can be edited:

1. Preheader text
2. Header image
3. Sidebar icon
4. Email body
5. Signature block
6. Footer logo
7. Footer
8. Drag & drop content blocks design settings

The next several pages explain how to work with each element.

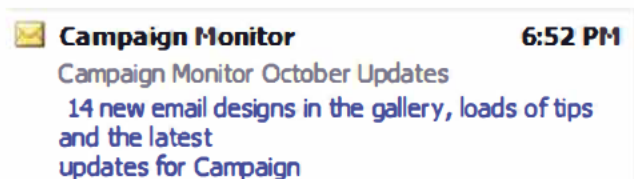
Edit Your Email: Editing Tools



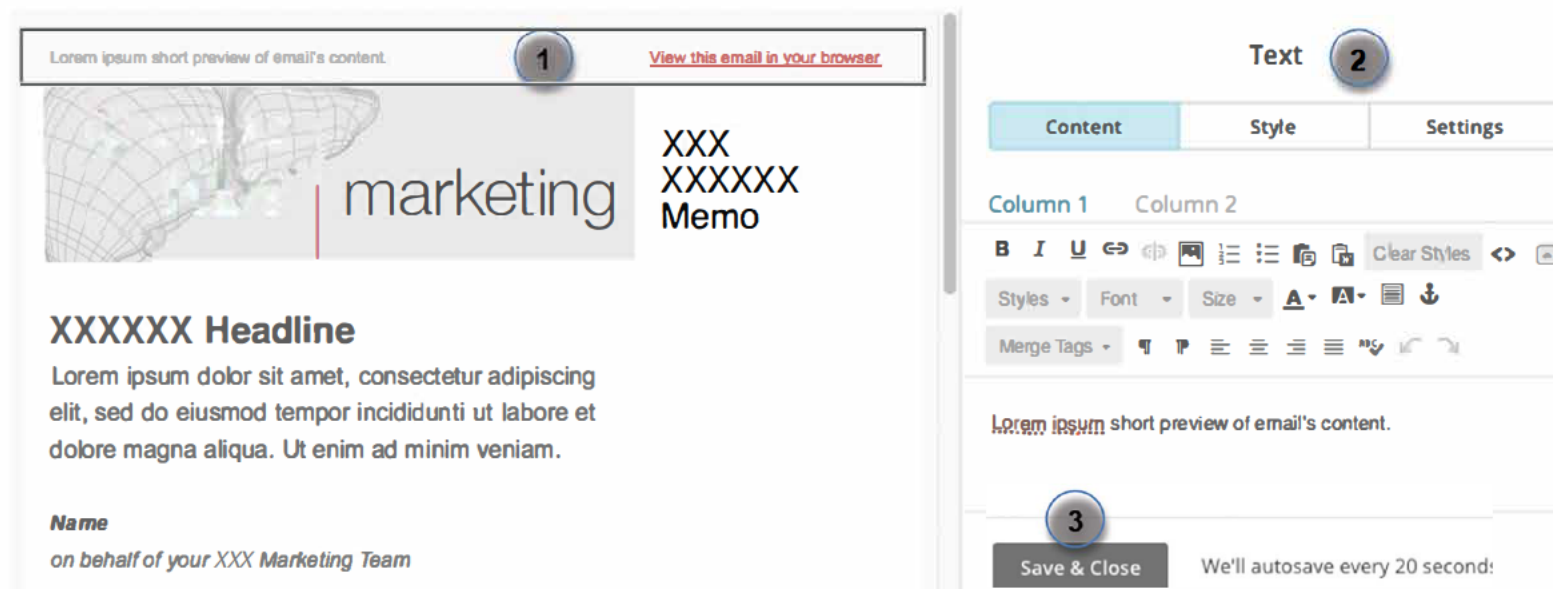
Following are the elements that can be edited:

1. **Editor Toolbar:** When you click on an element, the Editor Toolbar appears as an overlay on top of the element you clicked on.
2. If the element you clicked on is text, you will see the **Text Editor**. See Appendix A for details on how to use the Text Editor.
3. If the element you clicked on is an image, you will see the **Image Editor**. See Appendix B for details on how to replace images.

Edit Your Email: Preheader Text



Preheader text (example shown in blue to the left) provides information in addition to the subject line to entice recipients to open the email. Outlook displays up to 100 characters of preheader text in the inbox.



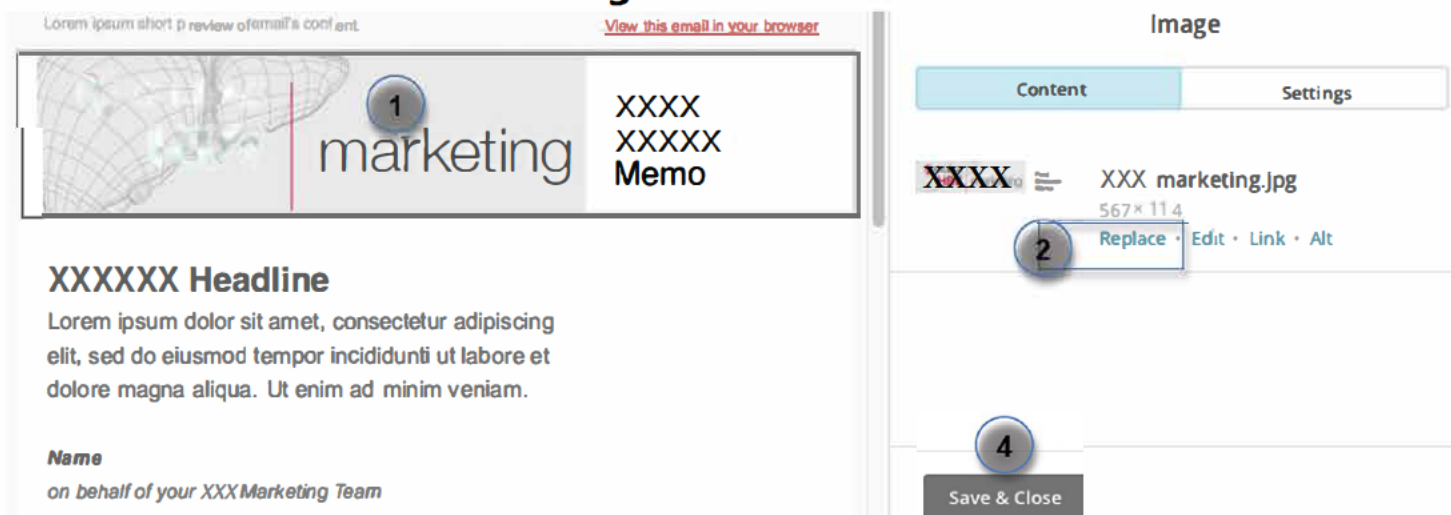
The screenshot shows the email editor interface. On the left, a preview of the email is shown with a preheader text area (labeled 1) containing the text "Lorem ipsum short preview of email's content." and a link "View this email in your browser". The main content area shows a "marketing" header and a "XXX XXXXXX Memo" section. Below this is a "XXXXXX Headline" and a paragraph of Lorem ipsum text. The footer shows "Name" and "on behalf of your XXX Marketing Team". On the right, the "Text" editor (labeled 2) is open, showing a rich text editor with various formatting options (bold, italic, underline, link, unlink, list, list-group, image, video, clear styles, etc.) and a text area containing the preheader text "Lorem ipsum short preview of email's content." (labeled 3). At the bottom, there is a "Save & Close" button and a message "We'll autosave every 20 second!".

To customize the preheader of your email:

1. Click on the preheader text to access the text editor.
2. Use the Text editor to write the text.

3. Click **Save & Close** button when finished.

Edit Your Email: Header Image



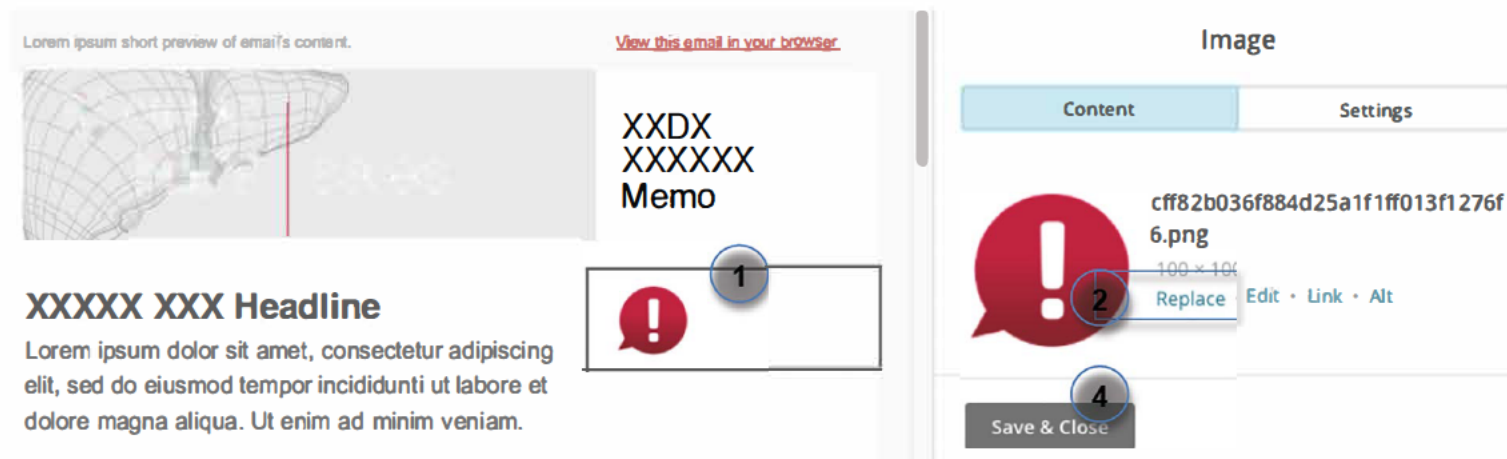
To replace the Header Image of your email:

1. Click on the **Header Image** to access the Image editor.
2. In the Image Editor, click the **Replace** link.
3. In the File Manager, select the **XXX Headers** folder and choose the header image you want.



4. Click the **Save & Close** button when finished editing.

Edit Your Email: Sidebar Icon



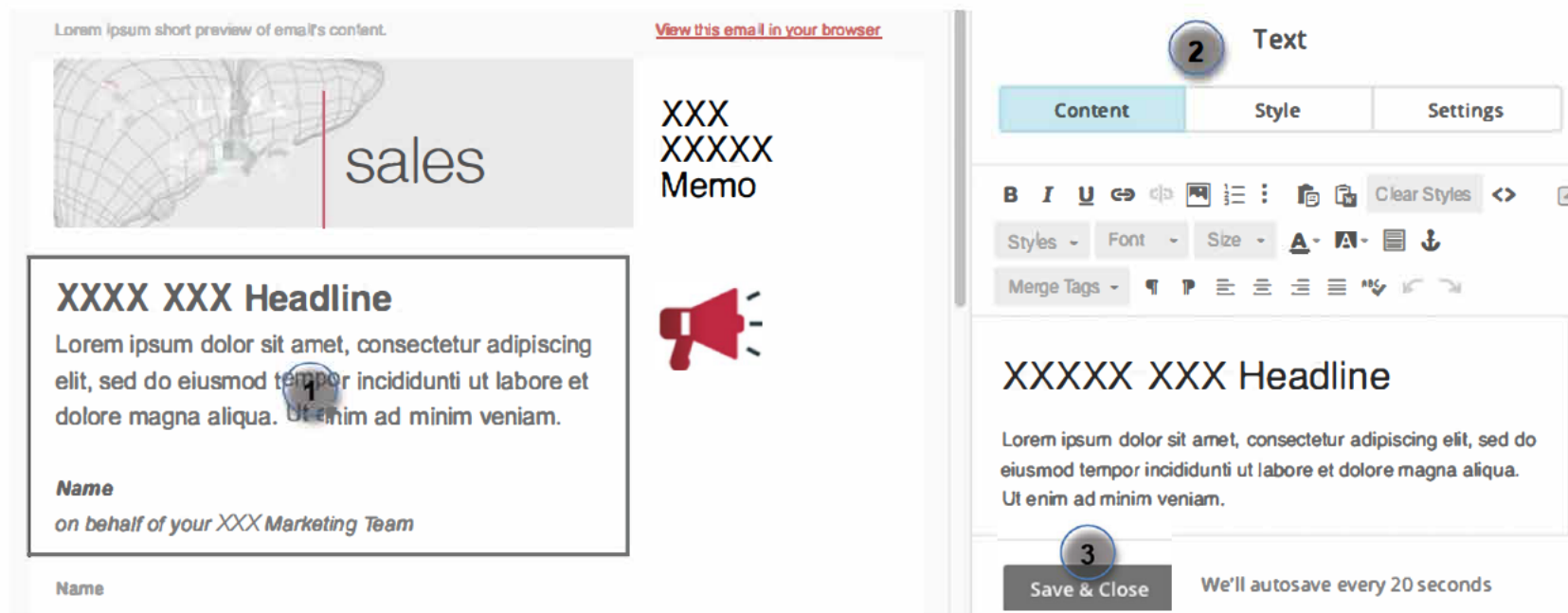
To replace the Sidebar Icon in your email:

1. Click on the **Sidebar Icon** to access the Image editor.
2. In the Image Editor, click the **Replace** link.
3. In the File Manager, select the **Icons** folder and choose the icon you want.



4. Click the **Save & Close** button when finished editing.

Edit Your Email: Email Body



The screenshot displays the email editor interface. On the left, a preview of the email body is shown, featuring a header with a wireframe globe and the word "sales", a main content area with a headline "XXXX XXX Headline" and a paragraph of Lorem ipsum text, and a signature block with the name "Name" and the text "on behalf of your XXX Marketing Team". A red megaphone icon is visible next to the preview. On the right, the "Text" editor is open, showing a toolbar with various formatting options (bold, italic, underline, link, unlink, image, list, indent, outdent, clear styles, etc.) and a text area containing the same headline and paragraph as the preview. A "Save & Close" button is at the bottom left of the editor, and a status message "We'll autosave every 20 seconds" is at the bottom right.

To customize your email's body copy:

1. Click on the **body copy** to access the text editor.
2. Use the **Text Editor** to write the text.
3. Click **Save & Close** button when finished.

Edit Your Email: Signature Block


















dolore magna aliqua. Ut enim ad minim veniam.

Name
on behalf of your XXXMarketing Team

Name
XXXXXXXXXXXXXX, Inc.
Title, XXX Marketing
Phone: xxx-xxx-xxxx
Email: name@xxx.com

Please do not reply to this message. If you have questions or feedback, please contact Name, whose information is provided above.

2 Text

Content	Style	Settings
<div style="margin-bottom: 5px;"> B I U      Clear Styles   </div> <div style="margin-bottom: 5px;"> TOG... Font i2 A A- A+ ↓ </div> <div> Merge Tags           </div>		
<p>Name</p> <p>XXXXXXXX XXXXX Inc.</p> <p>Title, XXX Marketing</p> <p>Phone: xxx-xxx-xxxx</p> <p>Email: name@XXX.com</p> <p>Please do not reply to this message. If you have questions or feedback, please contact Name, whose information is provided above.</p>		

3

Save & Close
We'll autosave every 20 seconds

To customize your signature block:

1. Click on the Signature Block to access the text editor.
2. Use the Text Editor to insert your name, phone number, and email address.



3. Click **Save & Close** button when finished.

Edit Your Email: Footer & Footer Logo

dolore magna aliqua. Ut enim ad minim veniam.

Name
on behalf of your HBV Marketing Team

Name
[Redacted]

Title, [Redacted] Marketing
Phone: xxx-xxx-xxxx
Email: name@[Redacted].com

Please do not reply to this message. If you have questions or feedback, please contact Name, whose information is provided above.

[Redacted]

[Redacted] Logo, are trademarks of [Redacted] Inc.
©2016 [Redacted] Inc. All rights reserved. 1/16
If you no longer wish to receive email communications from [Redacted] [unsubscribe here](#).

[Redacted]

Footer

Content

Style

Settings

We may automatically add your contact info into the footer block. Contact information is required in all campaigns to comply with the [CAN-SPAM Act and international spam law](#).

Edit Contact Info

B

I

U

↺↻

↺↻

Clear Styles

↔

⬆

Styles ▾

Font ▾

Size ▾

Merge Tags ▾

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©2016 [Redacted], Inc. All rights reserved. 1/16
If you no longer wish to receive email communications from [Redacted] [unsubscribe here](#).

[Redacted]

Save & Close

We'll autosave every 20 seconds

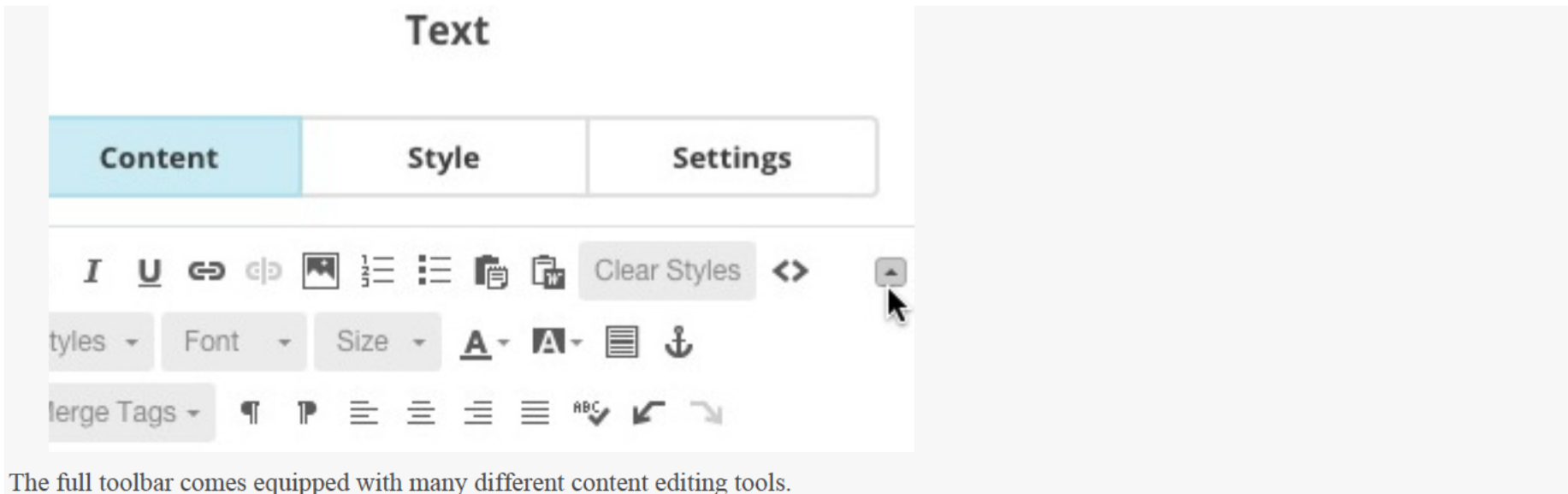
Do not modify the footer or footer logo.



Blasting an Email

Here explain how to copy into an email and send out . . . ?

Appendix A: Text Editor



Toolbar Features

- Text Tools



Use the *Bold* and *Italic* options to change the appearance of the text.

Keyboard shortcuts:

⌘ B Bold text

⌘ I Italic text

- **Link Tools**



The link tool is used to [create a link](#) to a website or file in your content. Keyboard shortcut: ⌘ L Create link

If you've added a link that you no longer need, you can highlight the link and use the broken link icon to remove it.



- **File Manager Tool**



Use this icon to [upload and add an image](#) to your text box. You can also click this icon to [upload a file](#) to our servers.

- **List Tools**



These tools let you create an ordered (numbered) or unordered (bulleted) list in your content.

- **Paste Tools**



The first paste tool allows you to paste your content as plain-text, which is great for copying and pasting from other websites and other formatted text. The second icon is for the *Paste from Word* tool.



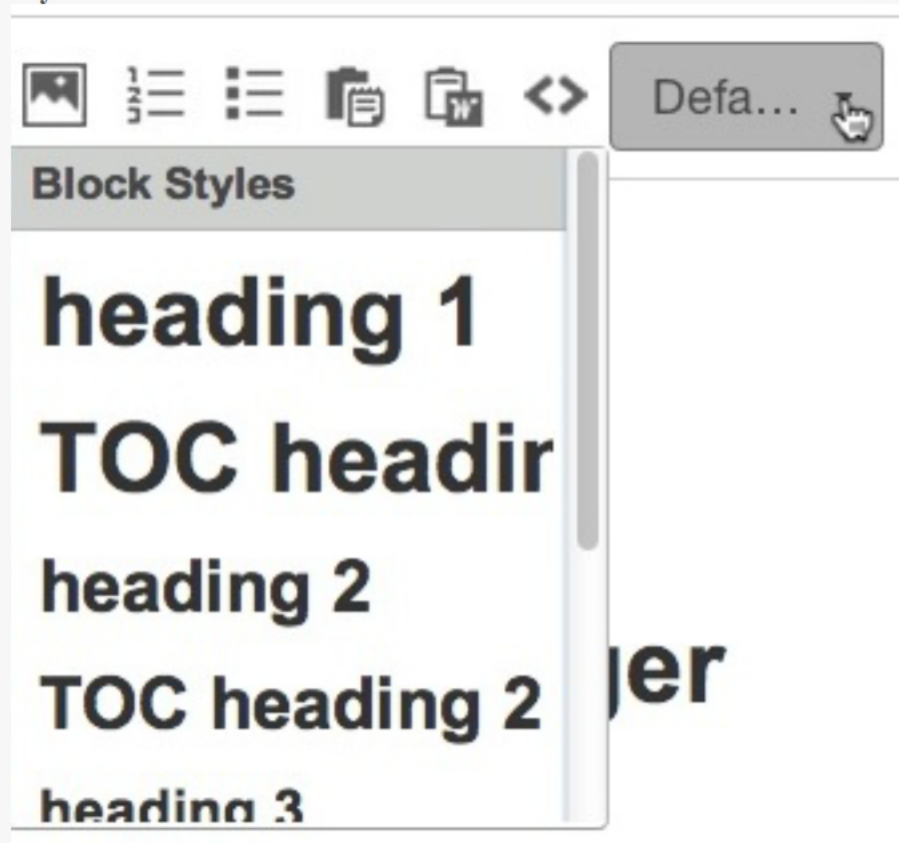
This clears most unnecessary [Microsoft Word formatting](#) that can mess up the way your HTML email is displayed in subscribers' inboxes. The *Paste from Word* tool removes a lot of the content's other formatting too, so you may need to add headers and other formatting back in using the Campaign Builder's editor tools.

- **<> Source Code Button**



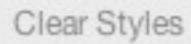
Click the < > *Source* icon to access the underlying HTML source code for the content area you're working with. If you need to edit the source of the template itself, you'll need to [export the template from MailChimp](#) and edit in the HTML file directly.

- **Styles**



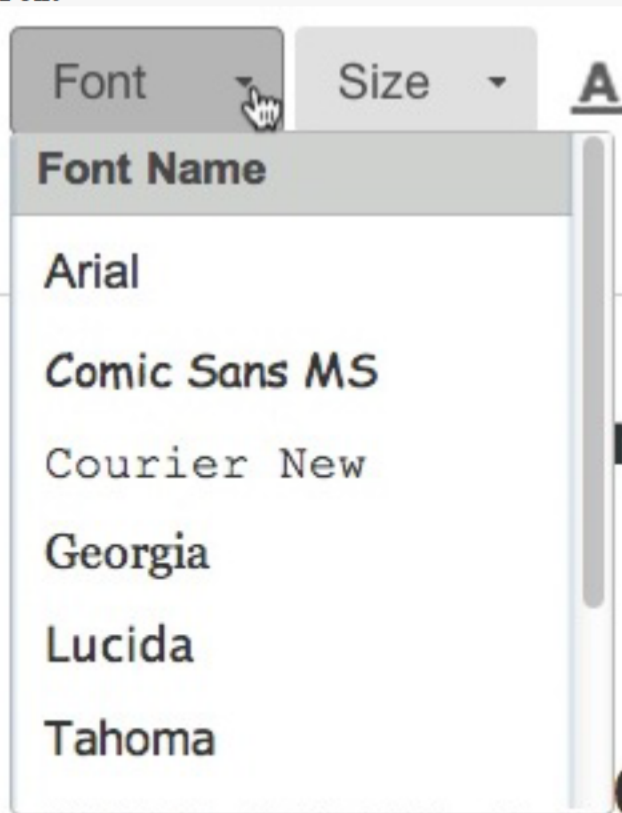
The *Styles* drop-down menu lets you set the font style for text you've highlighted. In some of our predesigned *Themes* you may only see the option for *Default* styles. If you'd like additional flexibility and functionality in setting styles, try our [basic templates](#).

- **Clear Styles**



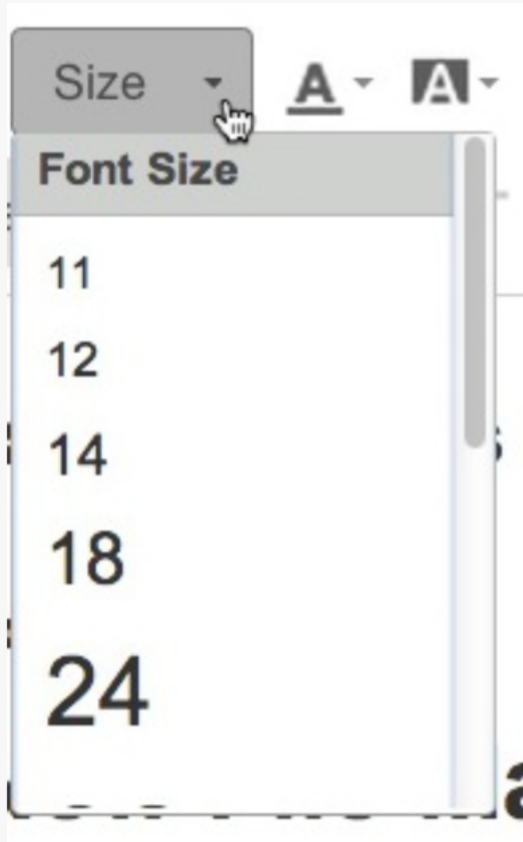
The *Clear Styles* tool, also known as the *Clear Formatting* button, allows you to remove formatting set for any piece of text without deleting the text itself. If you copied your content in from an outside source like a website and the format isn't quite what you're expecting, highlight the content and click this option to set the text back to the default style in the [style editor](#).

- **Font**



Choose the font you'd like to use for your text by selecting from the optional fonts in this drop-down menu. We recommend [using fonts that are considered global to all computers](#) in an email, because you can't install special fonts on your recipient's computer.

- Size



Use this drop-down menu to set the font size for your text. Some font styles in our predesigned *Themes* have specific sizes set directly in the template code and can't be overridden.

- **Color Tools**



Use these tools to set the color of the text as well as the background color of your text. If you're looking to change the background color for sections of your template, you can do that using the [style editor](#).

- **Underline**



Use the *Underline* option to change the appearance of the text.

Keyboard shortcut: ⌘ U Underline text

- **Alignment Tools**



Use this option to left align, center, right align, or [fully justify](#) the text and images in your content.

- **Spell Check Tool**



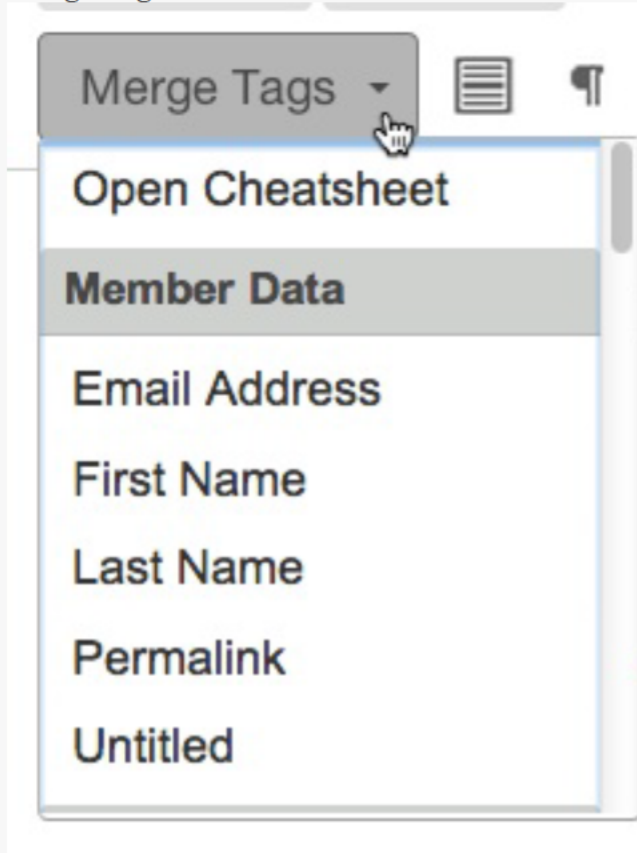
This tool can be used to check the spelling within your campaign and help you correct any misspelled words. We still encourage you to [preview and test](#) your campaign before sending.

- **Anchor Tool**



You can create anchors in your content to link to another section within your campaign. Anchors can be used to create a [table of contents](#) or a [Read More link](#).

- **Merge Tags**



Use the *Merge Tags* drop-down menu to add [merge tags](#) to your content. You'll find tags for Member Data, List Data, List Links, Social Sharing, Social Profiles and Content Helpers.

- **Line Tool**



The *Line* tool allows you to add a horizontal line to your content to separate areas of text.

- **Text Direction Tools**



Use these options to set direction on your text: from left to right or from right to left.

- **Undo/Redo Tools**



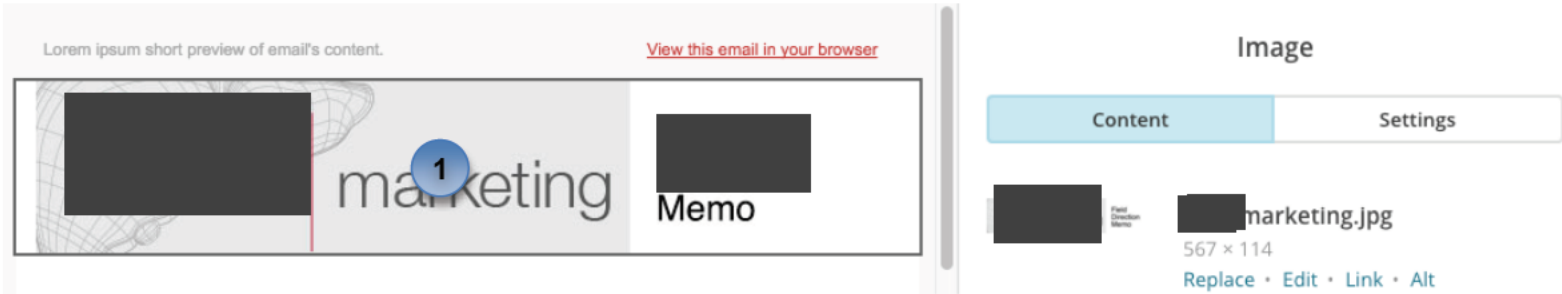
Use the arrows to undo and redo selections of text in your content. The arrow pointing to the left will remove any content that was just added in while the arrow pointing to the right will redo anything that was just removed.

Keyboard shortcuts:

⌘ Z Undo action

⌘ Y Redo action

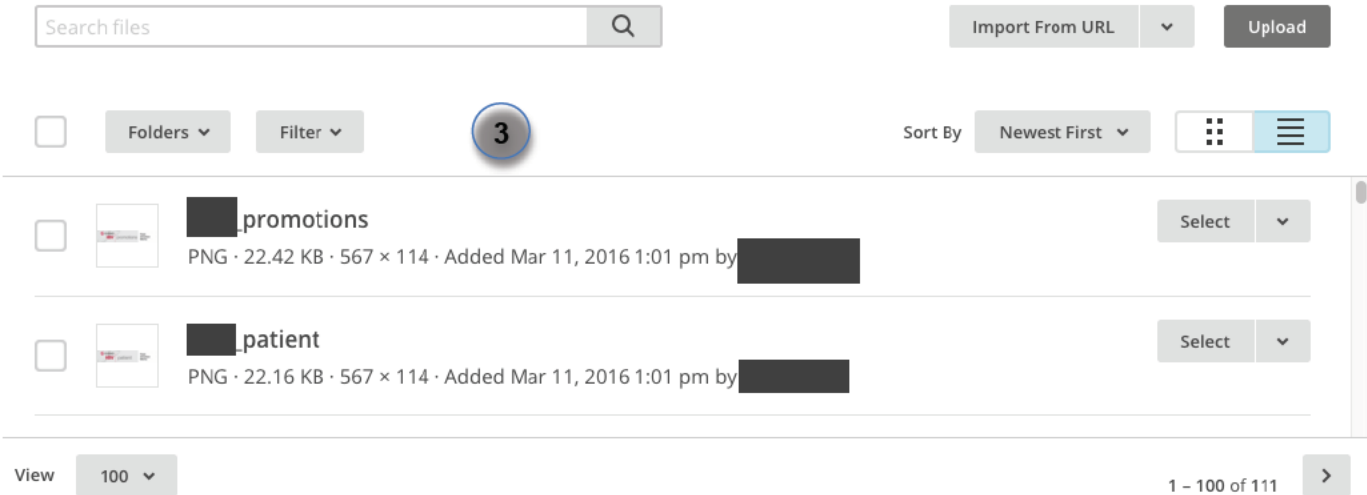
Appendix B: Replacing Images



To replace an image in your email:

1. Click on the image to access the Image editor.
2. In the Image Editor, click the **Replace** link. This will open the (3) **File Manager**:

3



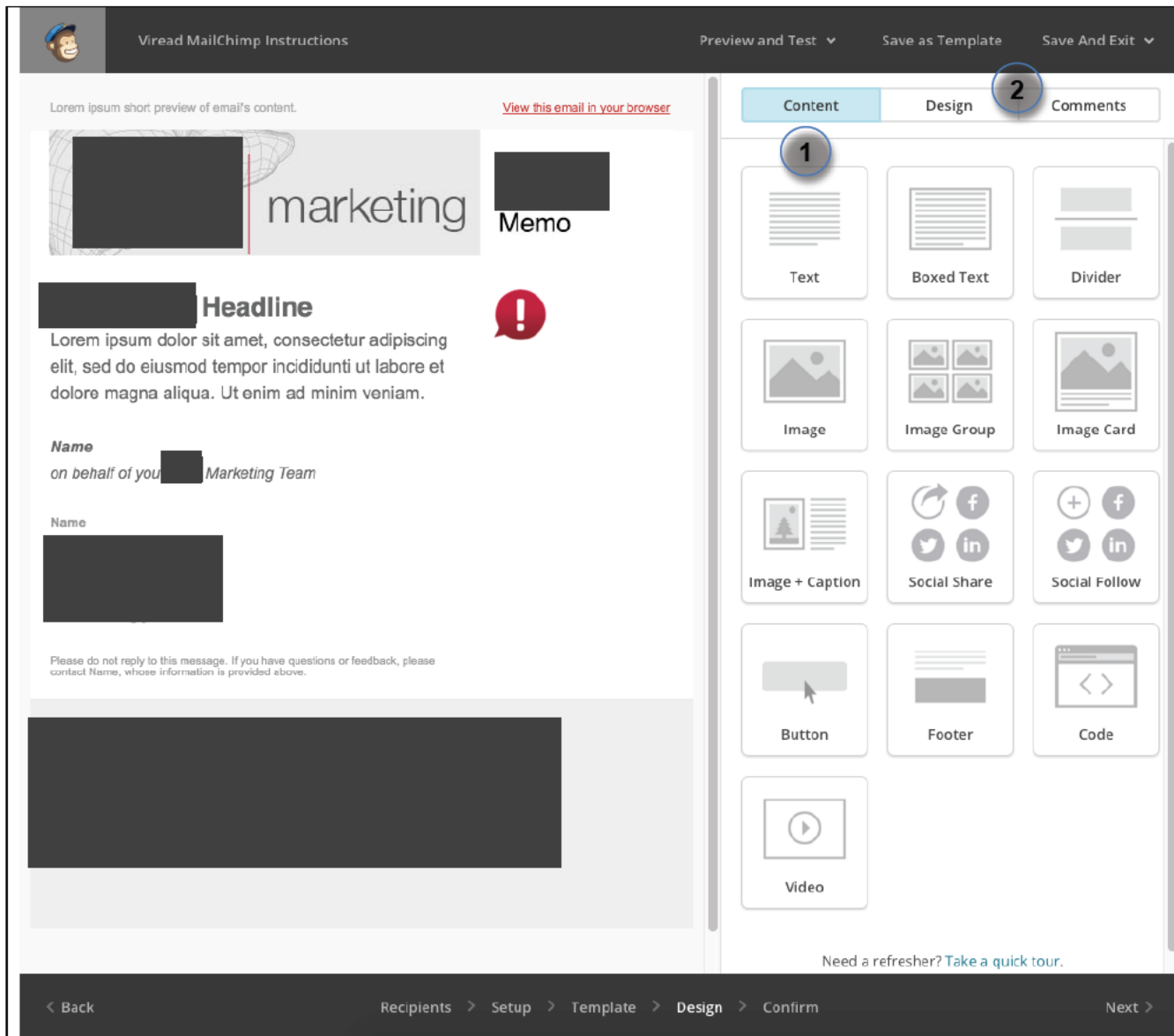


Appendix C: Images Available in File Manager

Insert all Template Graphics grouped by folder



Appendix D: Drag & Drop Content Blocks and Design Settings



Viread MailChimp Instructions

Preview and Test Save as Template Save And Exit

View this email in your browser

marketing

Memo

Headline

on behalf of you Marketing Team

Name

Please do not reply to this message. If you have questions or feedback, please contact Name, whose information is provided above.

Content Design Comments

1

2

Text

Boxed Text

Divider

Image

Image Group

Image Card

Image + Caption

Social Share

Social Follow

Button

Footer

Code

Video

Need a refresher? [Take a quick tour.](#)

< Back Recipients > Setup > Template > Design > Confirm Next >

1. **Drag & drop components:** click on a content block -- such as "Divider" or "Image" -- and drag it to the location where you want to add it to the email. (See additional details on next page.)
2. **Design settings & Comments:** do not use.



- [Text](#) – Add text, [upload images](#), and [wrap text around an image](#).
- [Boxed Text](#) – Add text within a border, and choose a background color to display behind the text.
- [Divider](#) – Add a horizontal line between content blocks.
- [Image](#) – [Upload an image](#) to a campaign.
- [Image Group](#) – [Upload multiple images](#) to a campaign.
- [Image Card](#) – [Upload an image](#) and add a caption within a border, and choose a unique background color to display behind the image and caption.
- [Image Caption](#) – [Upload an image](#) with a caption to the left, right, or bottom.
- [Social Share](#) – Add social icons to allow recipients to share your campaign on sites such as [Facebook](#) or [Twitter](#).
- [Social Follow](#) – Add social icons so recipients can follow you or your company on sites such as [Facebook](#) or [Twitter](#).
- [Button](#) – Add a button that links to a website or [file for download](#).
- [Footer](#) – Add our [default footer](#) to your campaign.
- [RSS Header](#) – Pull in [*\[RSSFEED:\]*](#) tags for your feed automatically. Only available for RSS-Driven Campaigns.
- [RSS Items](#) – Pull in [*\[RSSITEM:\]*](#) tags for your feed automatically. Only available for RSS-Driven Campaigns.
- [Code](#) – Add custom HTML to further personalize your campaign.



Appendix E: Account Settings

Security questions that we created for the account:

Security Question 1: Name of your first employer

Answer:



Security Question 2: Name of the street you grew up on

Answer:



Security Question 1: In what city did your parents meet

Answer:

