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MailChimp – Basic Instructions

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What is it? Simple email marketing software for designing, sending, and tracking your email campaigns.

Why use it? Add professional elements to your email like images, columns, etc. Get automatic notification if someone unsubscribes to your list. Personalize your mass email with recipients' first names. Send scheduled emails.

How much does it cost? Free if you have fewer than 2000 subscribers whom you send fewer than 12,000 emails per month to fewer than 2,000 subscribers. You can upgrade to a couple other platforms if you need to.

Getting Started:

Create, confirm, and log in to your MailChimp account mailchimp.com

Create a list of email recipients: Choose **Lists** from the dashboard, then **Create List**. Name your list; enter default “from” email and default “from” name. Remind people how you got their contact info. Enter contact info for this list (necessary to comply with anti-spam laws: see references), then click on **Save**.

To add recipients to your list, click **Add Subscribers**. Choose **Add a subscriber** to enter each one manually, or **Import subscribers** to import a list.

To manually add subscribers, enter Email Address, First Name, and Last Name. You must check the box “This person gave me permission...” or you can't add the contact. Click **Subscribe**.

To import an email list, click on **Import from a CSV or Text File**. Browse to the file on your computer; choose **Auto-Update my existing list** so duplicates are not added, then **Upload List**. You have to match the columns in your CSV file to those in MailChimp (Email Address, First Name, Last Name): click **Save** on each column. If the columns don't match automatically, you have to choose the right column from the dropdown list. Click **Complete Import**.

You can edit or update a list by clicking on **Manage subscribers**.

Create Your Campaign: You can use a completely custom template for your campaign, but it's easier to start with an already built template. You can save a template from one campaign to the next for re-use.

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Click on **Create Campaign**, then **Create an Email**. Choose what list of contacts you want to send to. Name your campaign and enter the Email subject the recipients will see when the message reaches them. (The From Name and From Email Address are added automatically from those entered when you created the list.) Click the **Personalize the “To:” field** so the greeting uses each recipient’s name and enter the code for this: enter `*|FNAME|*` for first name. Scroll down to see social media options like Auto-post to Facebook after sending. Click on **Template** in the bottom menu.

Choose the theme for your campaign. Click **on Select**, not on the image. (I almost always use 1 column drag and drop – it lets you add both text and images.) You’ll be taken to the Design area.

From the left side of the design area, hover over each section. You’ll see you can choose from Edit, Duplicate, or Delete (don’t delete the footer – it’s required by MailChimp and has the mandatory anti-spam info like how to unsubscribe).

In the header block, type your salutation. If you want each recipient’s first name to show up, type “ ” followed by a colon. In the Preview mode and test emails, this will show as Dear <<Test First Name>> and not as a real name.

You can add more blocks by clicking and dragging them from the right side. You can change the attributes (color, font size) of different elements like dividers and text by clicking on them and modifying their styles.

At any time, you can see how your design looks by clicking on **Preview and Test** from the top right of the design screen. Get out of the Preview mode by clicking on the **X** in the upper right corner.

When you’re ready to send a test email, click on **Preview & Test**, then **Send a Test Email**. *Always do this!* I almost always see something I want to change.

When you’re ready to send, click on **Confirm** at the bottom of the screen. Confirm your details, then choose either **Schedule** (to send in the future) or **Send**.

There’s lots more you can do with MailChimp – this is a basic primer. Google for any other subject you want to learn about, like “how do I link my MailChimp campaign to my Facebook page?”

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The word "EUREKA" is written in a large, dark, hand-drawn style font. It is centered horizontally over a background image of a misty landscape with mountains and water.

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References:

[Mail Chimp vs. Constant Contact](#)

[Getting Started with MailChimp](#)

[How Much Does MailChimp Cost?](#)

[Examples of Compliant and Non-compliant Lists](#)

[How to Import CSV Contact List](#)

[Another resource for Importing Contacts](#)

[Integrate Facebook with MailChimp](#)

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