

Getting Started with MailChimp



Start at Dashboard

Tip: To delete anything (list, campaign, template, etc. click the box to the left of the item you want to delete and the option to delete it will appear. Type DELETE to confirm that you want to delete this item.

Tip: Click on Monkey to get to Dashboard

Create List

1. Click lists
2. Click create list to begin
3. Name your list
4. Email address (better to use domain name, not Gmail, Hotmail, etc.)
5. Name from (personal name or business)
6. Reminder of why they are getting this email "You are receiving this email because you signed up for _fill in the blank__)
7. Address is entered already (set this up when you signed up) Can edit if you like
8. Choose when to get notifications if you want them
9. Save

To save time you can create a template for future emails. Will save your banner, social media icons, etc. and you can add text as desired.

Create template

1. Create template
2. Choose a template select
3. Create your own template (will be select your own from my saved templates when you are creating campaigns)
4. Add logo or image
5. Delete or add
6. Edit upload
7. Can edit image
8. Main email body, can leave blank *(this is a template)
9. Add social media icons
10. Settings option will allow you to change the appearance of the icons

11. Can add social share buttons (can share the content with others)
12. Save and close
13. You can create as many templates as you want

Create sign up forms

1. Go to the list you want to create a sign up form for or use the dropdown on the right after choosing a list
2. Choose the form you want to create from the drop down arrow (sign up form)
3. Choose the form builder, this will create a link you can share with the form you create
 - a. Note: Embedded forms will show up as a sign up box on your website, this will create code that can be added in a widget
 - b. Once you create a form in the form builder you can create an embed code for that form
4. Choose if you want to allow subscribers to check email format (plain text or HTML)
5. The link of what you create is below this check box
6. A basic form will be on the page and you can edit from here
7. You can delete what you don't want (type DELETE)
8. Move or add sections (drag)
9. Add image (s) if desired
10. Drag and drop from field list on the right
11. Field settings will add merge feature (personalized) choose first name, etc.
12. Design as you like, add background color, text color, edit header, etc.
13. Auto translate feature switches text to language of the person viewing. If you check this box, MailChimp will automatically switch the language of your form to match the language specified by the user's browser
14. There is no save button, just copy the link and open in a new browser and you can see what it review
15. You can go back and edit at any time

To create an embed code for this form (add to your website)

1. Do all the steps above
2. Go back to sign up forms and choose the embedded forms option
3. Change the style of your form by selecting classic, super slim, horizontal or naked
4. Add or change title
5. Choose to show all fields or just required (email address)
6. Copy the paste the code provided in your website

Create Campaign (now automation is included in the campaign tab)

1. Click on create campaign
2. Choose email you want to create
 - a. Regular (goes out to everyone you choose at the same time (or)
 - b. Automated (goes out at frequency you set based on when they signed up)
3. Complete To, from, subject line and preview text. click save
4. Click on Design email and create your email content
5. Can use a template you created (under saved templates) or choose one of MailChimp's templates

6. Tips:
 - a. For the welcome email, the MailChimp trigger is set at 1 day by default (You can change this to immediate if desired)
 - b. If your freebie is linked in the thankyou/confirmation page, then can send this message on day 1 with a “Did you get it?” message and send the link to the freebie again.
 - c. If your freebie comes in the first email, then set to immediate
7. Select list to send the message to (can sent to only a segment if desired)
8. Create email and click next
9. Note: The first time you create a campaign, you will have to set some demographic and MailChimp will need to verify your from address
10. If you are creating an autoresponder sequence (funnel) you can add emails and set the trigger
 - a. Trigger is when the email goes out based on when the subscriber was added
 - b. Click “add email” to add another message, can change the trigger and edit the message from there
 - c. Click on design email

Landing page

1. Start at Dashboard (monkey icon)
2. Click on create campaign
3. Choose landing page
4. Name your page
5. Select list for subscribers to be added to
6. Start with blank page
7. Add the elements you want from the contact list on the right
8. Can design color, background, fonts, size, etc. in the Design tab on the right
9. The sign up form is already embedded based on the list you selected
 - a. (note: need to create the sign up form first)
10. Save and close (bottom right)
11. Add page title (this will automatically be added to permalink – url of the page)
12. All campaigns (email and landing pages can be found on the campaigns list and will identify what list it is attached to
13. Can edit any of these by click on the campaign and choosing the design tab on the right

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