NASSGAP How-to: MailChimp

This how-to guide will cover navigating to a template, replicating a template, editing a template, and how to apply it to a list for email distribution.

Logging into MailChimp and navigating to the saved templates

Step 1: Follow this link to go to the login page: https://login.mailchimp.com/

Step 2: Enter your Username and Password in the corresponding boxes.

Step 3: Click the button labeled “Log In”

Step 4: Once logged in, click “Templates” in the top menu.

Step 5: Here you will be able to replicate a template to use.

Replicating a template

Any of your saved templates can be replicated from the Templates page in your account. This can save you a lot of time when you need to use a previous layout so you don't have to completely recreate it or when you want to test a new layout.

Follow the steps below to replicate a template in your account:

Step 1: Once on the template page, locate the template you would like to replicate.

Step 2: Click the template's drop-down menu on the right-hand side of the template and choose “Replicate.” This step will open the copied template in the template editor.

Step 3: Click “Rename” in the top menu next to the name of the template.

Step 4: Enter the name of the new template and click “Rename”

Editing a template

After renaming the replicated template, proceed with editing the template by clicking on the part of the template you would like to edit.

Step 1: Editing the text box.

a) For the text section, while under the “Content” tab, highlight the text that reads, “Text content goes here.” and delete it. Here you will be able to replace that text with whatever text you like.
b) This text can be edited like most other word processors with options for font, font size, formatting, etc.
c) When satisfied with the text content click “Save & Close”

Step 2: Editing the image box.

a) Click on the sample template image of the students studying.
b) Click “replace” on the image edit window on the right.
c) Select one of the images on the “content manager’ page that pops up after clicking “replace”
    i) Click “insert”
d) If there aren’t any images in the “Content Manager” that you have previously uploaded that you would like to use, click “upload” in the upper right of the page.
    i) From here, you will be able to select an image from your computer.
    ii) Once you select one from your files it will automatically be brought into the template
e) Click “Save & Close”

Step 3: Previewing the template

a) Click “Preview and Test” in the upper right hand corner.
b) Click “Enter preview mode” - Here you will be able to preview what the template looks like on Desktop, Mobile, and Inbox.
c) Close out of the preview by clicking the “X” in the upper right hand corner.

Step 4: Testing the template

a) Click “Preview and Test” in the upper right hand corner.
b) Click “Send a test email”
c) Add the emails where you would like the test email sent.
d) Click “Send test”

e) A test email will be sent to those emails. - check the email inbox of the email address you entered to send the test email to view the email.

Applying the template to an email campaign

Step 1: Click “Campaigns” in the menu at the top of the page.

Step 2: Click on the blue button labeled “Create” in the top menu.

Step 3: Click on “create an email”

Step 4: While on the “regular” tab, type in the name of the email campaign under “Campaign Name”

Step 5: Click “Begin”

Step 6: Click the button “Add Recipients” for the “To” section.

a) Choose a list of recipients for the email to be sent to from the drop down labeled “Choose a list”
b) If you would like to segment who on the list recieves the email, click the drop down menu under “Segment”
c) **Optional:** Check the “Personalize the "To" field” box to display the recipient's name instead of their email address. This is more personal and may help you avoid spam filters.
d) After you check the box, you'll choose a merge tag that corresponds with the list data you want to display in the "To" field. For example, if you choose *|FNAME|*, a recipient named Bob will see "To: Bob" instead of "To: bob@example.com." The default options are *|FNAME|*, *|LNAME|*, and *|FNAME|* *|LNAME|*, but you can click Custom to enter an alternate tag or text.
e) Click Save.

Step 7: Click the button labeled “Add From” in the “From” section of the campaign builder.

a) Enter your from name and email address.
b) You may be asked to verify the domain in your email address.
c) Click Save.

Step 8: Click “Add Subject” in the subject section of the campaign builder.

a) In the Subject field, enter a subject line for your email.
b) In the Preview text field, you can enter up to 150 characters that will display next to your subject line in recipients’ inboxes. This field is optional.
c) Click “Save”

Step 9: To design the content for your campaign using the template that you built, click the button labeled “Design Email”

a) Click on the “Saved Templates” tab.
b) Click on the template you created that you would like to use.
c) Click “Save & Close”

Step 10: Choose to either “Schedule” the campaign out or “Send”

To Send:

a) Click “Send”
b) Click “Send Now” to confirm the send.

To Schedule:

a) Click “Schedule”
b) In the Schedule Your Campaign pop-up modal, use the date picker to set the delivery date.
c) Click the Delivery time drop-down menus to choose a time of day.
d) Review your settings and click “Schedule Campaign” to confirm.

Adding Attachments in a Template

1. Navigate to your template
2. Open or add a content block
3. Type what you want the link to say
4. Highlight the word, and hit the link icon
5. Use the "Link To" drop down to select "File"
6. Upload a new file, and click on it to use that specific file or choose from the library
7. Hit the insert button in the top right

Screenshot of the file dropdown: