MANUAL
ESWA MAILCHIMP MANAGEMENT

Version 1.3 - Colleen Gauron (colleengauron@gmail.com), Bill Betz (bill.betz@ucdenver.edu)
December 2022

ESWA uses several programs to communicate electronically with people: Wix ($55/yr), MailChimp (free), InMotionHosting (free). We also access GoDaddy and Techsoup.org for special procedures. The techniques for using MailChimp are described below.

MAILCHIMP

Background: We use MailChimp (MC) for all of our emails to large audiences. The service is completely free for us. We are limited to 2,000 names on our mailing list (we currently have nearly 1,000) and we are limited to sending no more than 1,000 emails per day. We have had no difficulty staying within our limits.

After you log in, it is pretty simple to create and send an email. It's a 3-step process. First, create the email (make a "Template"), then choose your recipients (from our "Audience" of 1,000), and then join the two together in a "Campaign" and send it out.

For specific instructions on creating and sending a weekly "clicklet" announcing Get Wild newspaper articles, please see Part V (below).

LOGIN
URL: https://login.mailchimp.com/
Username: bill.betz@ucdenver.edu
Pw: [contact bill.betz@ucdenver.edu or colleengauron@gmail.com]
Click "Login"
Login Verification:
Click "Answer a security question"
Paternal grandmother? Best friend from childhood? Town of mother's birth? [contact bill.betz@ucdenver.edu or colleengauron@gmail.com for answers]

Click "Submit Verification"
Vertical menu on left side: We use only 2 of the items (Audience and Campaigns)

A. TEMPLATE - CREATE YOUR EMAIL

A draft email is called a Template. After creating it you'll join it to your Audience; the combination is called a Campaign.

On the Home page, click "Campaigns" (left side vertical menu)

Click "Email templates" from the drop down menu. The complete list appears showing all the templates that we have ever made. In making your own template, you have 2 choices – a brand new one, or a copy of an existing one. We do not recommend creating a brand new one, because MC tries to force you into one of their own templates. So start with a copy of an existing template.

To start with an existing ESWA template, scroll down to any of the existing ones (the "Clicklets" are simplest for practicing) and beside the "Edit" button on the right, click the little down arrow and click "Replicate" in the popup menu. This will make a copy of the template and take you to the MC Editor.

You are now in the MC editor. The left side shows how the template will appear – this is how your email will look when sent.

The right side is used for entering all content – text, images, etc. When the editor opens, it shows a dozen boxes in the editor. Ignore the boxes for now.
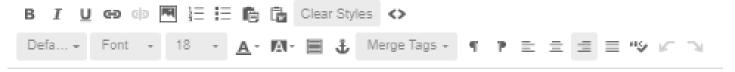
Begin by Renaming your template. In the far upper left, just to the right of the monkey face is the name of the replicated file (e.g., "clicklet_2210123 (copy 01)"). Click "Rename" and give the template a new name. (It

may then take you back to the previous page showing all templates. Just click "Edit" beside your new template's name and you will return to the editor.)

To edit the template, on the left side, click on one of the content boxes and on the right side its contents will appear. You can now edit the content and when done click "Save & Close" at the bottom. (Content is automatically saved every several seconds or so.)

EDITING YOUR TEMPLATE: All editing is done on the right side of the screen. At the very top is a menu. Ignore that for now (see box below for description).

Let's examine the two rows of tiny icons.

TOP ROW OF ICONS

1. B, I, U – the usual: **Bold**, *Italic*, Underline (you can also use CTRL/b, etc)

4-5. LINK: Two icons (left creates link, right breaks link). Select the text or image that will be linked. Click the left LINK icon and fill in the popup:

"Link to" – choose the destination (web or email)

Click "Web address" and add URL, or

Click "Email address" and add the email address, then type a default Message Subject and Message Body text. When a viewer of the email clicks the link, an email will pop up, pre-addressed to the recipient and with the default message and body text that you entered. The viewer can edit any of it before clicking Send (or the viewer can cancel).

6. CONTENT STUDIO: This icon is for adding an **IMAGE**. Position the cursor at the beginning of a paragraph, then click the Image icon. Thumbnails of all of the ESWA images will open (there are hundreds and they are not sorted, except by date of use – most recent first). Choose an image or:

Click "Upload" (upper right corner). This will open a folder on your computer. Navigate to the image that you want and double click on it. It will be uploaded and then displayed for you to edit. EDIT IMAGE:

Selecting the width or height of the image is important. MC emails are **600 pixels wide** (to accommodate screens on phones). Thus, if you want your image to span half the screen (with text on the other half), enter the width as 300 (the height will be adjusted to keep the image's aspect ratio constant).

Link to URL: you probably won't use this feature

Click "Show image style options."

Under "Align," choose the position ("right" is most common).

Ignore "Alt text" if you like

Under "Margin" you can enter the number of pixels around the image (e.g., 9).

Click "Save & Insert Image." Back in the editor, notice how the text wraps beside the image. (Something that Wix doesn't do!) If you don't like the result, double click the image in the editor and you will return to the Image Options page.

NOTE: You cannot resize the image by dragging it in the editor, only by going to the Image Options page and entering the number of pixels of width or height. Also, repositioning the image in the box by dragging it works, sort of… If you don't like how it is positioned, delete the image in the editor and reload it.

At the top of the Editor is a **menu bar**:

CONTENT: this is where the editing is done (be sure that you have clicked on a content box on the right)

STYLE: Use this to change background stuff. There are 2 grey bars:

"Text Style" grey bar – you can ignore these choices because all of these things can be changed from the main (CONTENT) page

"Container Style" heading – change the overall background color by clicking in the rectangle under "Background" and then dragging the 2 little circles. The results will be displayed immediately in the template on the right side of the screen. Under "Border" you can make a border around your content box (choose style, border width, and color).

SETTINGS: This is useless. Never use 2 columns (they don't work well on phone screens).

7-8. NUMBERED & BULLETED TEXT – the next 2 icons are the usual for numbering or bulleting paragraphs.

Ignore the rest of the icons in the top row.

BOTTOM ROW OF ICONS

1. DEFAULT – text styles that we haven't used

2. FONT STYLE – the usual meaning

3. FONT SIZE – the usual meaning. Sometimes MC gets confused and you need to resize text twice.

4. TEXT COLOR – the usual meaning

5. BACKGROUND COLOR – this is for the background on the selected text, not for the background of the entire box

6. INSERT HORIZONTAL LINE – this can be useful for separating different parts of text in the same text box.

We don't use any of the last icons, except for justification of text (left, center, right).

Special words

We sometimes add the recipient's name to an email. For example, if you want to have a salutation that begins, "Dear Sally" for Sally and "Dear Ralph" for Ralph, and so forth through the recipient list, in the editor you can enter the following:

Dear *|FNAME|*,

as the salutation, and MC will populate each email with the recipient's first name (drawn from the second column in the Audience list). You can also use *|LNAME|* for last name (from column 3) and *|NAME|* for both first and last names (from column 4).

Adding a new content box

If you are editing something on the right, click "Save & Close" at the bottom. This reveals about a dozen little squares. We use "Boxed Text" for a new content box. Just drag the square over to the left side – near the bottom you'll see rectangles that say "Drop Content Boxes Here." After dragging the box, you will see it open in the editor with the draft text "This is a Boxed Text block. Use a contrasting background to draw attention to this content." Just erase this draft text and start adding your own content. Note: by default, the new content box opens with a black background and white text. To change these colors, click the "Style" tab at the top, change the colors, and click the "Content" tab at the top to return to the editor.

SEND A TEST EMAIL

You can send a test email to see how it looks (you can check it on laptop and phone, for example). Because MC limits the number of test emails that we can send in a day, it is best to send it only to yourself, and then forward it to whomever you like. To send a test email:

In the upper right of the editor, on the black bar, click "Preview & Test"

From the popup menu, click "Send a test email"

In the popup, type your email address and click "Send Test." Then click the "OK" button that pops up. You will soon receive the email.

B. AUDIENCE – select recipients

There are about 1,000 people in our database ("Audience"). For each entry, there are 4 columns: email, first name, last name, and first+last name. It is easy to add, edit, and delete people from this list. The *only* thing that MC cares about is their email address.

It is also easy to send an email to a subset of our full audience, by the use of "tags," described later.

It is simplest of course to send your email to everybody in our audience. If, however, you want to update the audience from the ESWA Master List or if you want to send your email to only a subset of people, then you need to

EDIT THE AUDIENCE.

Click "Audience" in the vertical menu on the left.
CHOOSE THE CORRECT AUDIENCE
Under "Current Audience," click the down arrow and click "View Audiences"
We have 3 audiences, but 2 of them (blank01 and blank02) we never use. Click "ESWA Newsletter." This is the Audience that we always use.
Click "View Contacts" (upper right corner). This will display the full list of members of our database.
Ignore all columns except the first 4 (Email Address, First Name, Last Name, and Name).
MANAGING THE AUDIENCE:
Edit an entry:
Double click any entry in the Audience
On the right, under "Profile Information," click "Edit"
Edit the profile and click "Save"
Adding a new entry:
In the menu at the top, click "Add contacts"
If just one entry, click "Add a subscriber," then fill out the top 5 spaces on the popup form (sorry that 2 are called "First Name" – just fill them out the same). Also "Name" means "First Name and Last Name" (e.g., "Colleen Gauron"))
OR, if there are more than one entry
Click "**Import Contacts**" if you want to import Audience members from a file. We import contacts each month from the ESWA Master List (ML). It's very easy. Merry Lynne Hamilton manages the ML (Excel) and sends it out near the end of the month. It is organized just like the MC Audience – the first 4 columns are email, first name, last name, and name (first+last). So we just copy the ML members with emails and paste them into MC, and MC automatically updates any changes.
Open Excel and load the ML
Sort the ML by email (first column). This puts everybody without an email at the bottom.
Select the 1st four columns of all the rows with emails.
Copy the selection
NOTE: Don't worry if you have some entries that lack emails – MC will ignore them.
Now go to the MC Audience page and click "Add contacts" (menu at top) and then click "Import contacts"
How would you like to add contacts? Click "Copy and Paste," then click "Continue"
Click in the text window and paste (CTRL/V) the selection that you copied in Excel from the ML
Click "Continue to Organize"
Organize your contacts:
Under "Select an Audience" choose "ESWA Newsletter"
Under "Select a Status" choose "Subscribed"
Be sure to check the box "Update any existing contacts"
Click "Continue to Tag"
Tag your contacts: Leave this Tag form blank for now and click "Continue to Match" (see below for how Tags work)
Match Column Labels…
For the 3 orange columns click the top row, then click "Confirm" in the popup
Click "Finalize import"
Click "Complete import." A final message will appear. You have updated the MC list.

Click the monkey face in the top left to return to the home page.

TAGS

Use of Tags is a powerful way to segment the audience, so that you can send an email to anybody you want. For example, suppose you want to send an email to everyone who has donated to ESWA this calendar year. All you need to do is make a list of those people – just sort the ML in Excel according to the column named "Last pd dues" and select the first 4 columns of all those who gave this year. Then import them into MC, as described above, with the addition that when the page "Tag your contacts" appears:

Under "Search for or create tags" type the name of your tag (e.g., "donors 2022"), press ENTER and you will see the name of the tag just above the form. Then continue to import as described above.

Thus, while the Audience has 1,000 entries, only those that you imported carry the tag "donors 2022" and when you make your campaign, you will tell MC to send the emails only to those who carry that tag. A very cool system.

Tags are easy to manage. Go to the home page (monkey face) and on the vertical menu on the left, click "Audience" and then on the expanded menu click "Tags." You can easily delete any existing tags here.

Special case: Suppose that you want to send an email to those who are NOT tagged with a particular tag. You need to create a "Segment," as follows: Click audience > segments > create segment > type name of your segment > +Add another condition > Click How your contacts are tagged/Tags > type your Segment name/checkbox "**contact is not tagged**"/checkbox name of tag/click Review segment > click Save segment. This Segment now contains those who do NOT have your tag.

when you create the Campaign: > Add recipients > Choose audience/ click "Segment or Tag" and choose your segment. The campaign will not be sent to those NOT tagged. Whew!

C. CAMPAIGN – join your Template and Audience

Once you have designed your email (template) and have your audience ready, it is time to combine them in a Campaign. It is very easy to do; there are 4 steps:

Start at the home page (click the monkey face in the upper left corner).

Click "Campaigns" in the vertical menu on the left and choose "All Campaigns" from the drop down menu.

[Stats: A list of all emails (campaigns) that ESWA has ever sent appears. If you are interested in how viewers responded to a campaign, click "View Report" on the right and you can explore the data.]

Click the "Create Campaign" button in the upper right corner

On the left, under the monkey face, click "Email," then "Regular" from the dropdown menu.

Enter your "Campaign Name" and click the "Begin" button.

There are 4 simple tasks to do:

1. To: click the "Add Recipients" button

Choose an audience from the top drop down menu

On the right appears "Segment or Tag." You can choose from the drop down menu if you don't want to send the email to everybody in the audience.

Check the "Personalize the To Field" and select one of the choices (*|FNAME|* *|LNAME|* is good). This option adds the recipient's name to the email somewhere (not sure where – not in the body of your email), and MC says that it helps keep the email from being diverted to the junk folder.

Click "Save"

2. From: click "Edit From." These should be filled out correctly, so just click "Save" or "Cancel."

3. Subject: Click "Add Subject." Add the subject line of your email and add some preview text. Click "Save"

4. Content: click "Design Email."

In the top menu bar, click "Saved templates"

Click on the template of your email.

The MC editor opens and shows your template. You can edit it if you like. NOTE: If you edit the template here, it is saved separately from the original version, and you need to do any further editing here, and not in the original template.

Click the "Continue" button (upper right corner).

You have 3 choices now (upper right, 3 buttons):

Click "Finish later" if you don't want to proceed further right now. You can easily return later.

Click "Schedule" if you want to schedule when to send it. Choose the date and time and click "Schedule Campaign." You can edit the campaign any time before it is sent.

Click "Send" if you want to send it now.

APPENDIX I: Resubscribing a contact

Occasionally people report that they are not receiving our emails (newsletters, Eaglets, clicklets, etc). It is virtually always because they clicked "unsubscribe" on an email that they received, perhaps not realizing that they were unsubscribing from *all* emails from ESWA.

To resubscribe them:

View All Contacts

Click the box beside the name of the person you wish to resubscribe. Unfortunately, it may be difficult to find that person among the 1,000 names. So, you'll have to do a bit more:

Click Search > type name of person

Click on that person to go to Edit Profile

Click Tags > "+" > type unique tag name

Return to All Contacts

Click Filter by Tags, choose your new unique tag and you will see just the one entry to be resubscribed

Click the box > Actions >Resubscribe

Sometimes this doesn't work, and you will have to have MC send an email to the person for them to opt in again.