This guide is intended for Finance and Operations users. MailChimp provides help documentation on their site and we recommend you check out their help page for a more in-depth look at the email (campaign) topics covered here.

Mailchimp is the webmail platform used by Finance and Operations for newsletter distribution. We chose MailChimp for its ease of use and subscriber list options. Please do not send mass emails using Outlook or campus listservs.

Getting Started

1. Visit login.mailchimp.com and enter your user name and password.
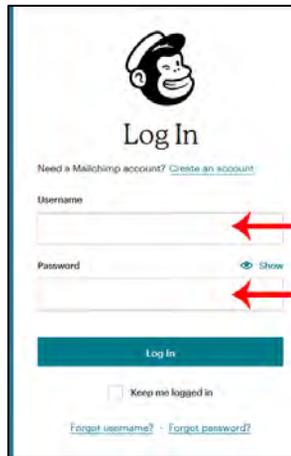
2. In the MailChimp dashboard choose 'Campaigns' from the top left corner of the navigation menu. Campaigns is MailChimp's term for "newsletter."
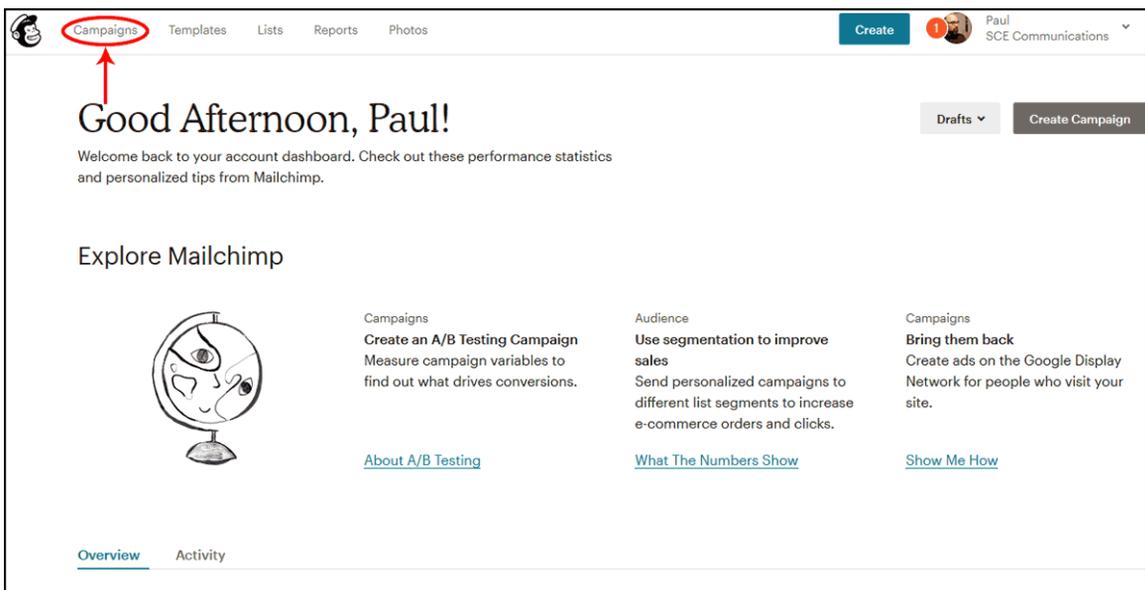
3. On the campaigns page, select 'Replicate' from the dropdown list from the sent campaign you would like to use to build your new campaign. *If this is your initial campaign refer to MailChimp's documentation or contact SCE Web Services (foweb@unc.edu) for assistance.*
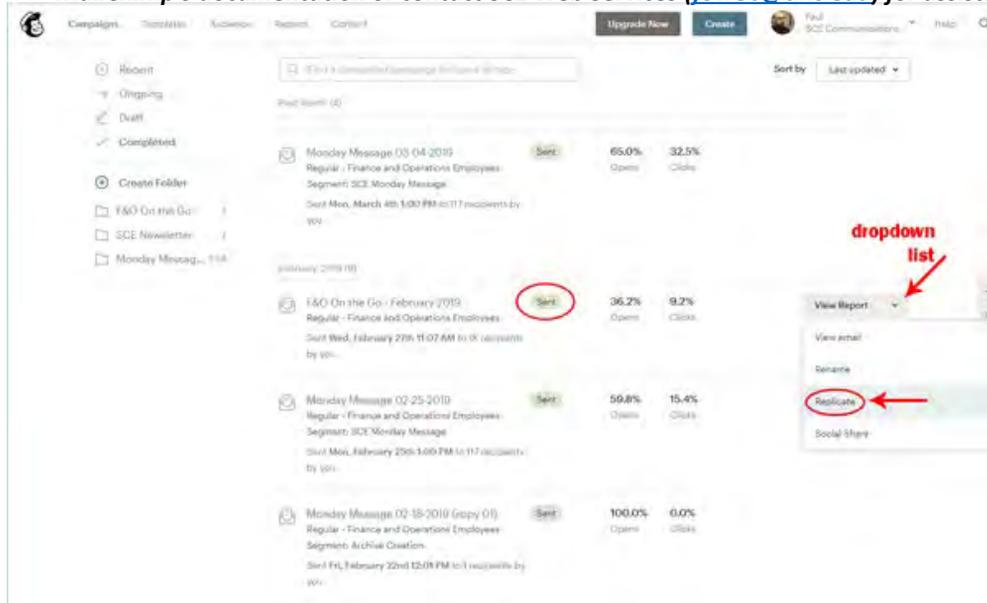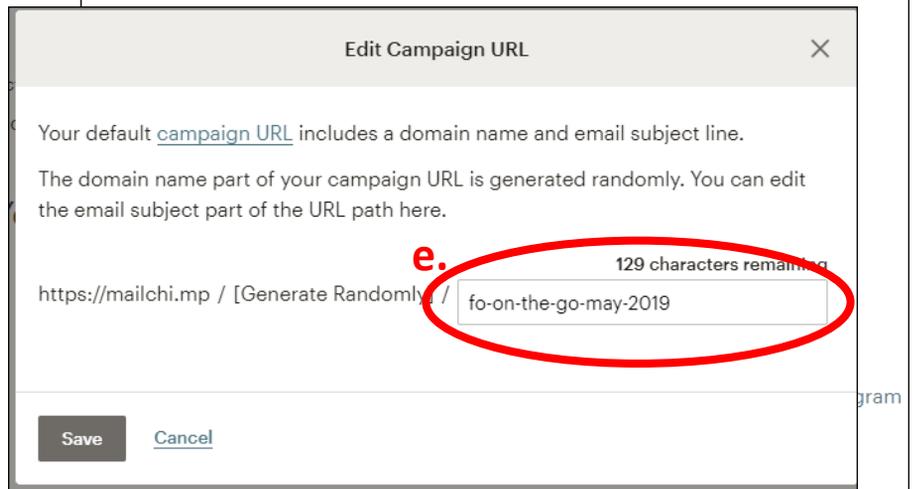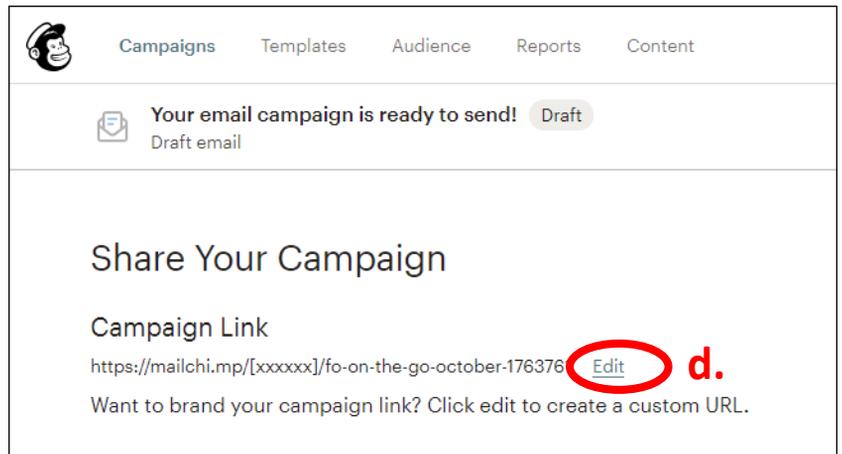

4. **Newsletter name, recipients and subject**:

   a) Rename the newsletter with the correct information (e.g., change "F&O On the Go – February 2019 (copy 03)" to the correct date and remove the "(copy 03)" text).

   b) Confirm recipient list is correct. In most instances, the recipient list will remain the same as the previously sent version of the same newsletter. For information on updating or changing your recipient list contact SCE Web Services (foweb@unc.edu)

   c) Edit the subject line to reflect the correct newsletter name and date.

Note: Do not use special characters or emojis in the subject line. They do not render correctly in archived versions of the newsletter.
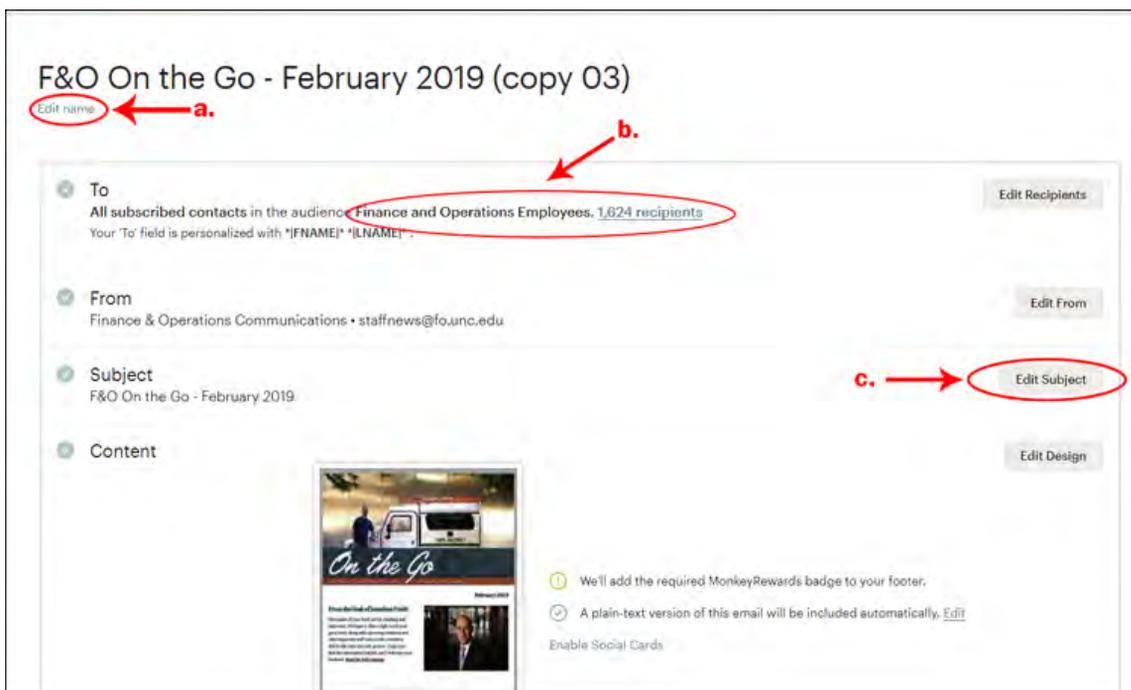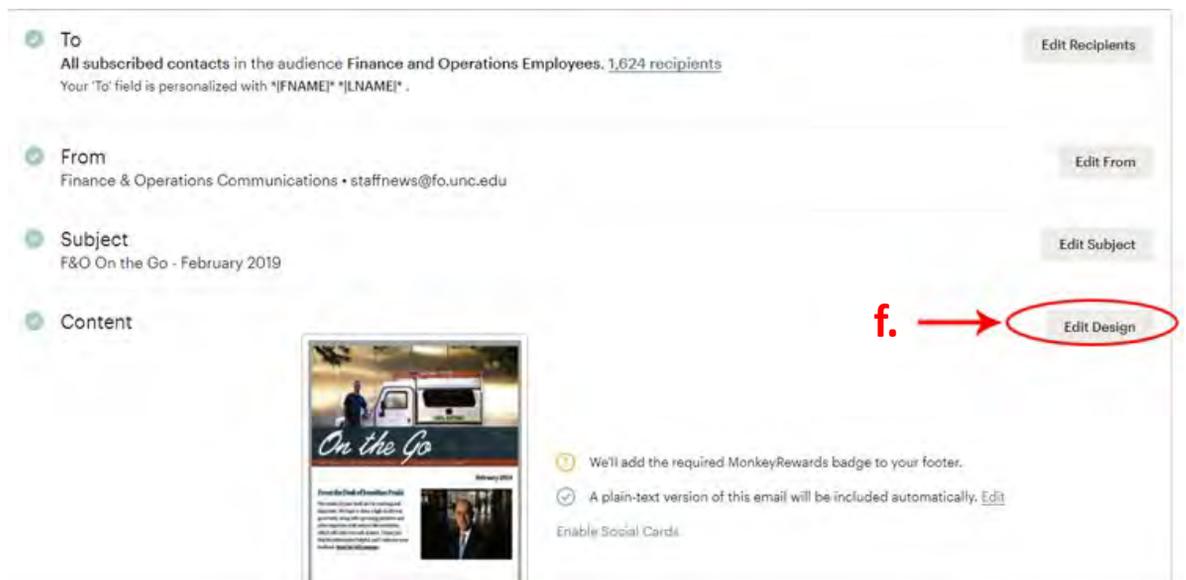
4. (continued)

d) Scroll to "Share Your Campaign" and choose "Edit" under "Campaign Link."

e) In the pop up box, edit the URL for the campaign you are about to send so it reflects the newsletter title and date. *Use lower case only and hyphens to separate words. Do not use any special characters or symbols.*


Campaigns   Templates   Audience   Reports   Content

Your email campaign is ready to send!   Draft
Draft email

Share Your Campaign

Campaign Link

https://mailchi.mp/[xxxxxx]/fo-on-the-go-october-176376   Edit   **d.**

Want to brand your campaign link? Click edit to create a custom URL.

Edit Campaign URL   ✕

Your default campaign URL includes a domain name and email subject line.

The domain name part of your campaign URL is generated randomly. You can edit the email subject part of the URL path here.

e.   129 characters remaining

https://mailchi.mp / [Generate Randomly] / fo-on-the-go-may-2019

Save   Cancel

f) Choose "Edit Design" to begin editing your newsletter content.

○ To
All subscribed contacts in the audience Finance and Operations Employees. 1,624 recipients
Your 'To' field is personalized with *|FNAME|* *|LNAME|*.   Edit Recipients

○ From
Finance & Operations Communications • staffnews@fo.unc.edu   Edit From

○ Subject
F&O On the Go - February 2019   Edit Subject

○ Content   **f.** →   Edit Design

We'll add the required MonkeyRewards badge to your footer.

A plain-text version of this email will be included automatically. Edit

Enable Social Cards

Editing and Adding Content

Content blocks are the elements you can choose to build your campaign and include Image, Text, Image + Caption, Video, and HTML blocks. Most content blocks you will use in F&O newsletters will be "Image + Caption" blocks. The following steps will work for all other content blocks available in the editor.

1. Click on the content block you would like to edit in the newsletter (a.).
   In the editing box that appears to the right (b.),
   copy and paste or type your content.
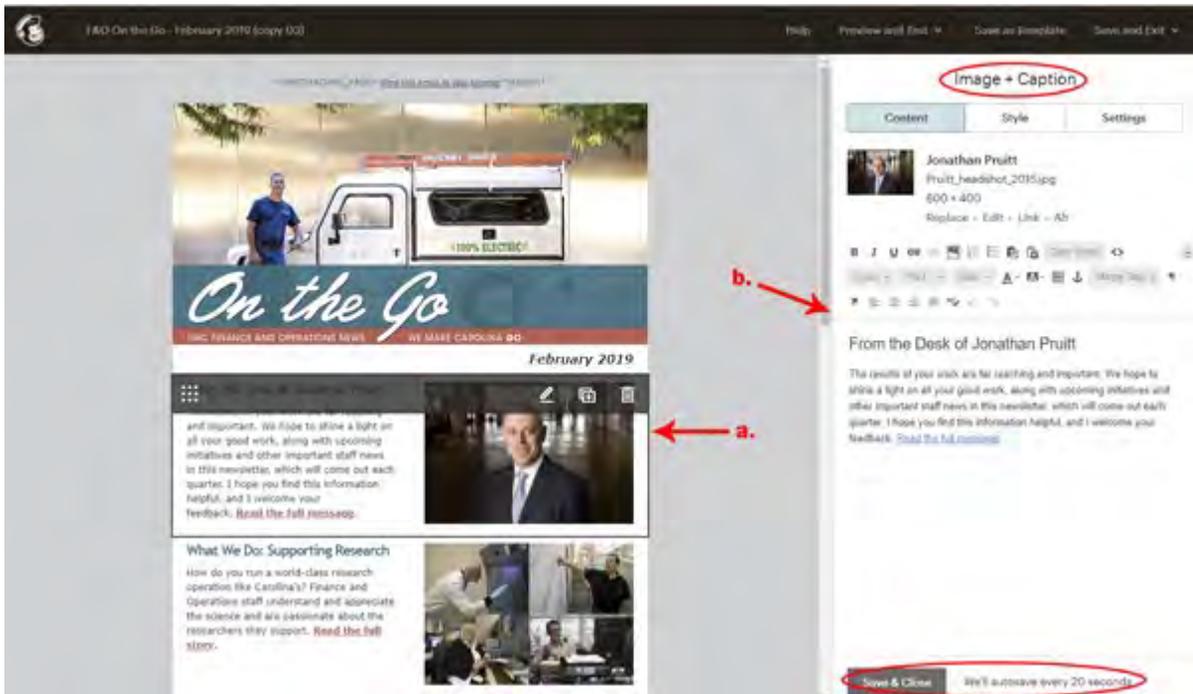
2. If you have copied and pasted content from Word or another program, some unwanted formatting may be included. If you would like to remove this formatting, highlight the text area and choose "Clear Styles".

HTML editing is available by clicking the <> icon in the editing toolbar. The <> icon enables you to toggle between the visual editor and the HTML editor panes.

If you are comfortable with HTML editing, you may use this option to fine tune the appearance of your content block.

If you have any questions about HTML editing, please contact SCE Web Services (foweb@unc.edu).
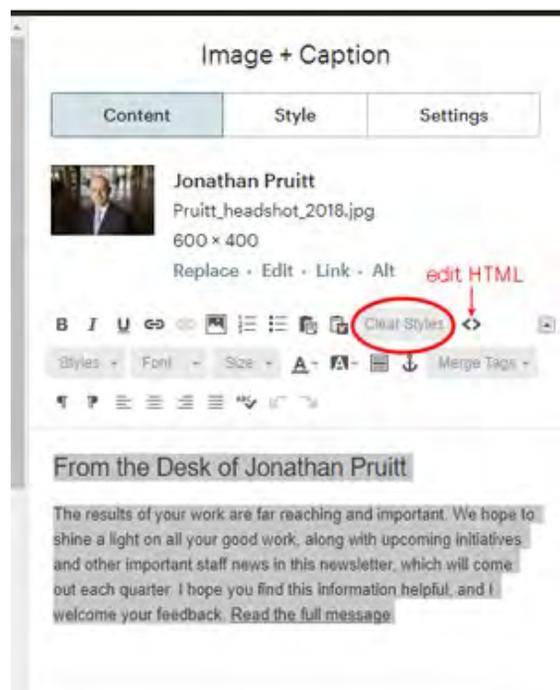
Editing and Adding Images and Photos

Within your content blocks, you may wish to replace existing images or add an image to a new content block. The process is the almost the same in both instances.

1. You may add images in a new content block by dragging or dropping them from a file on your computer or choosing "Browse" in the image block or Image + Caption editing block to open the "Content Studio" (image library) of already uploaded images.
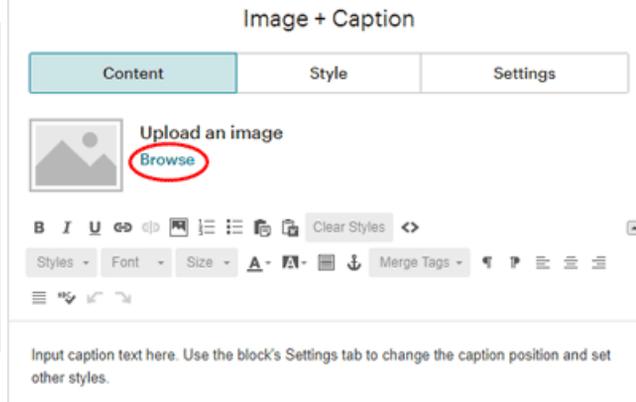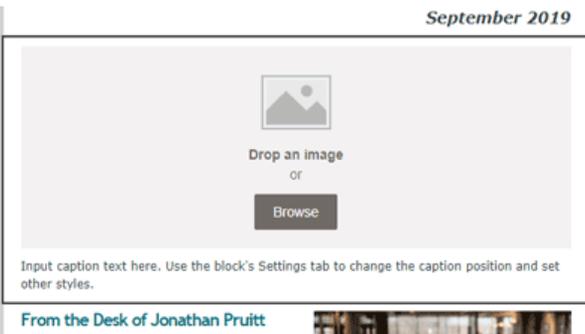

2. To replace an image in an existing content block, choose "replace" in the editing block to open the "Content Studio"
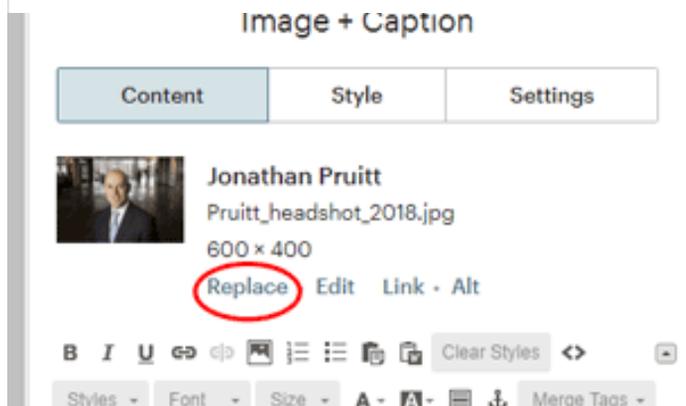
3. Once in the "Content Studio," select an image from the existing library or choose "upload" to add an image to the library from your computer's files.
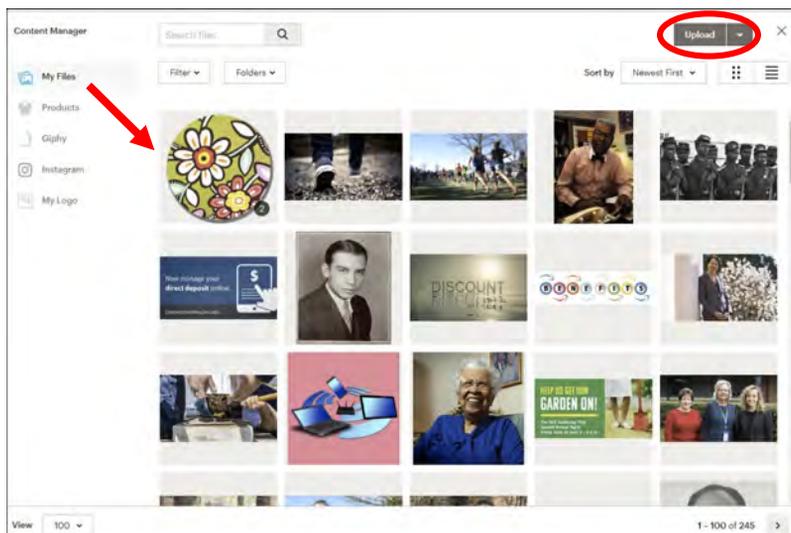
4. If you would like to change the position of the image in relation to the text in your content block, choose "settings" In the Image + Caption editing block and make your selections from the dropdown lists.
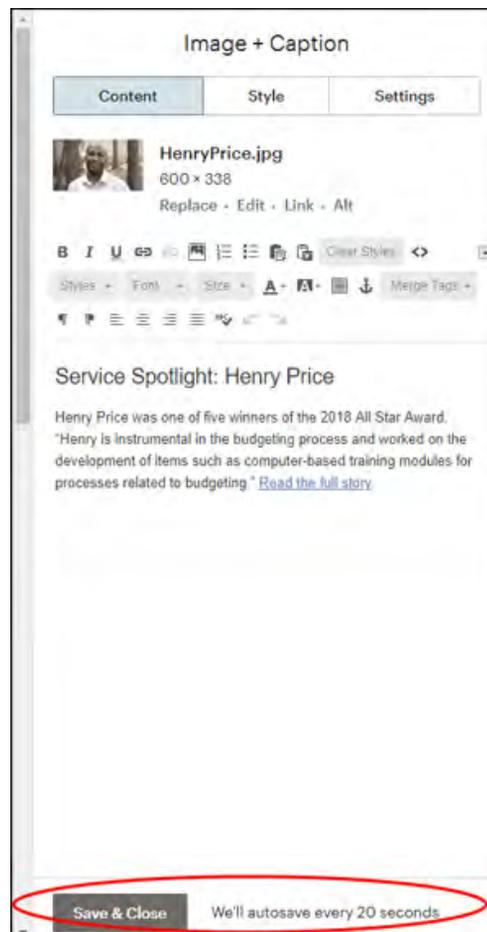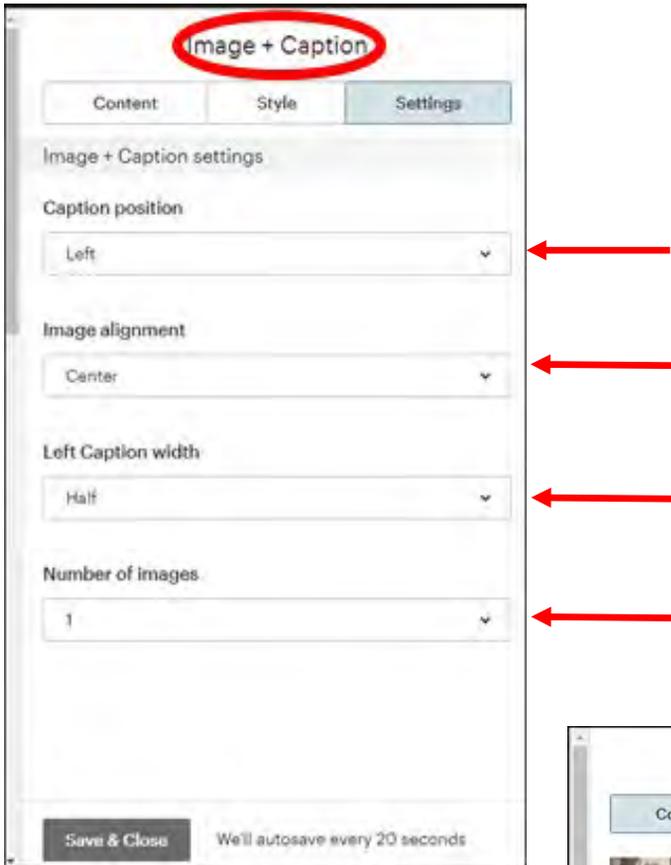

Choose "Save and Close" to save changes.

Adding Section Dividers

In many instances, you may want to add section dividers to your newsletter. Section dividers can help clarify the start and end of each section or add visual appeal to the newsletter.

1. To add a divider, drag and drop a "Divider" content block between stories.

2. Style your divider using the content editor in the "Divider" content block.
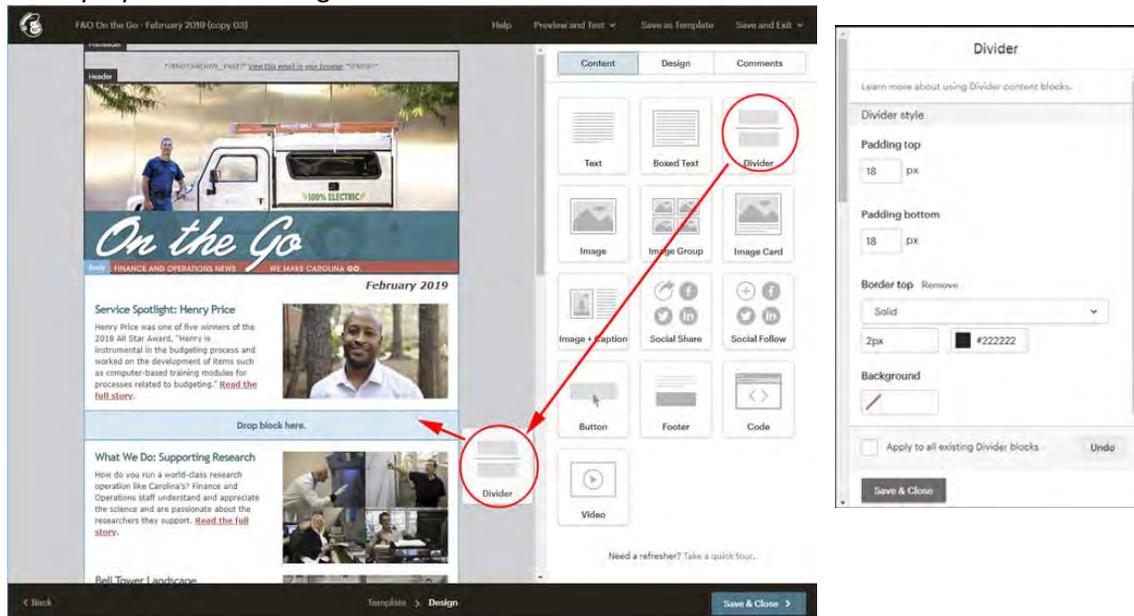
3. If you would like to repeat the same style divider in multiple places in your newsletter, choose "Duplicate Block" when hovering over your existing divider to copy it.

4. Drag and drop the newly copied divider between the next stories you would like to separate.

Select "Save & Close."
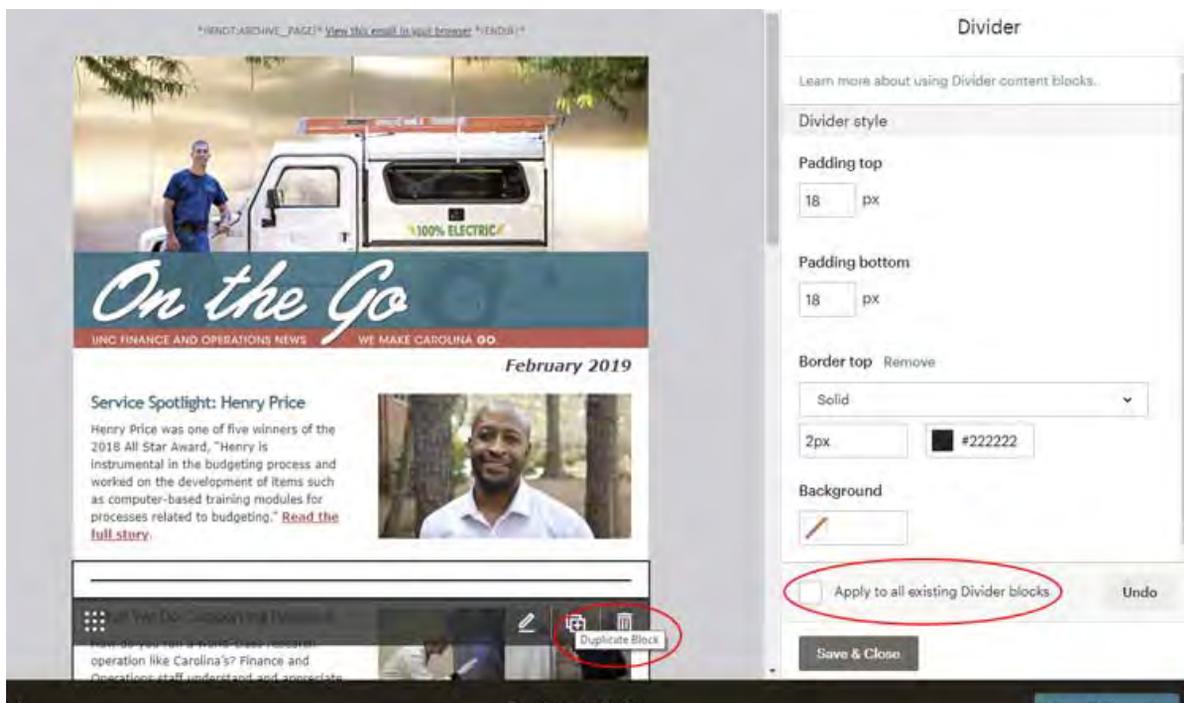
Preview and Send Test Copies

1. Choose "Preview and Test" from the menu at the top right of the screen then choose "Enter preview mode" from the drop-down list.
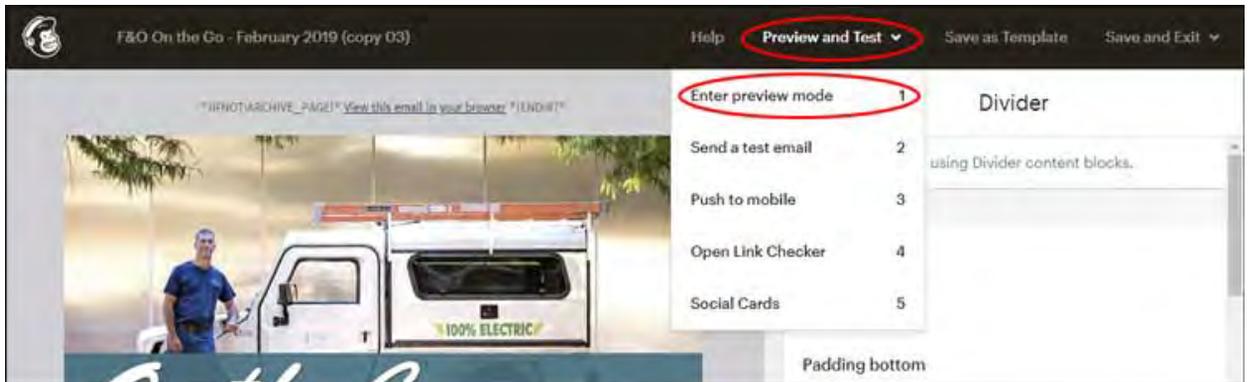
2. Test all the links in your newsletter to ensure they point to the correct web addresses.

3. Proofread for other errors.

4. Choose the "X" in the top right corner to exit the preview page and return to the main editing page.
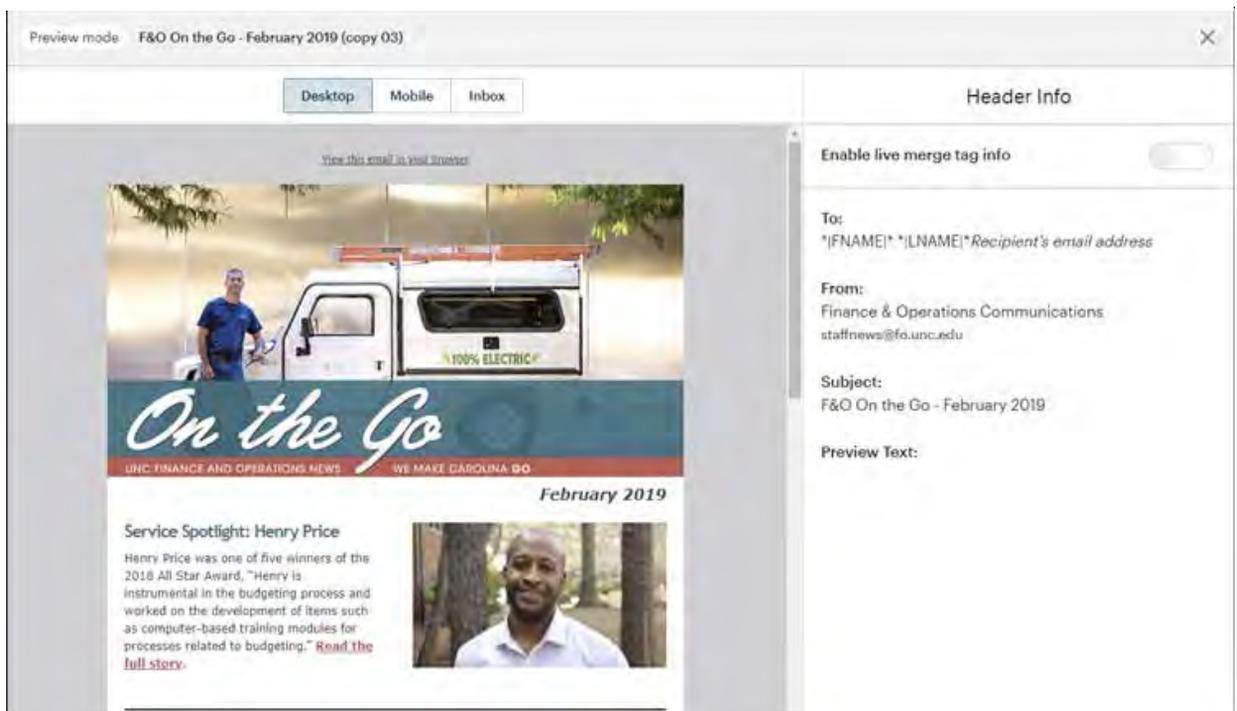
5. To send a test of your campaign, choose "Preview and Test" from the top menu and then choose "Send a test email" from the drop down.
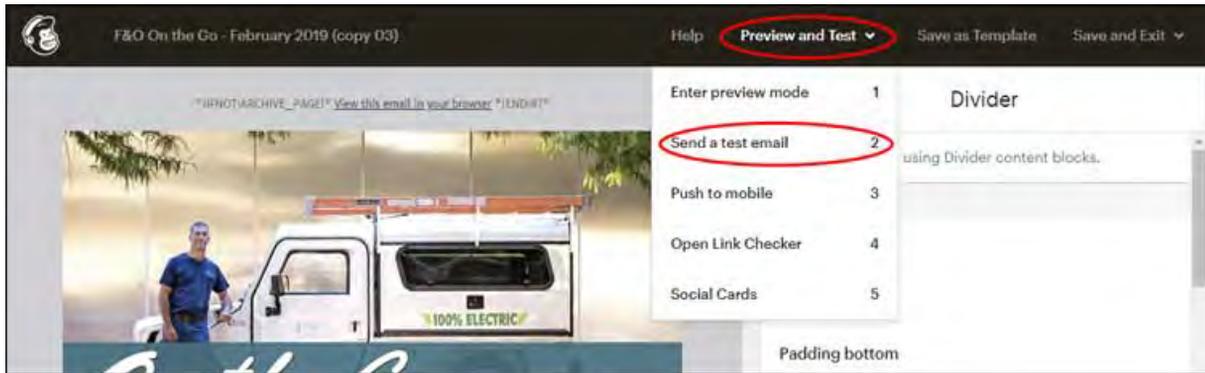

6. In the "Send A Test" pop-up box, enter email addresses separated by commas, and check administrators' names from the selection list to copy them on the test.

As MailChimp free plan users, we can send up to 12 test emails per campaign, but no more than 24 total test emails in a 24-hour period. Tests can include up to six addresses at once. (About Test Email Sending Limits)

Add a brief message to the test recipients by choosing "Include instructions and a personal message (optional)"

7. Choose "Who should be notified by email about new comments?" if you would like to add other recipients other than yourself to replies from the test message.
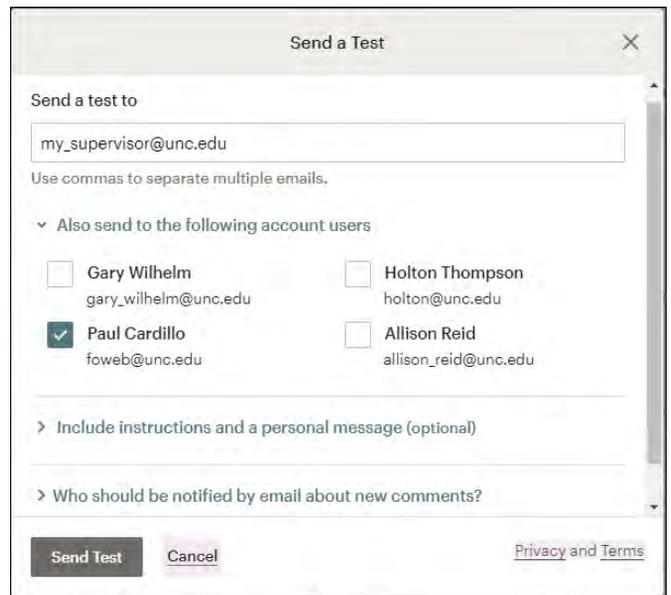

After completing all edits to the newsletter select "Save and Close" from the bottom of the main editing page
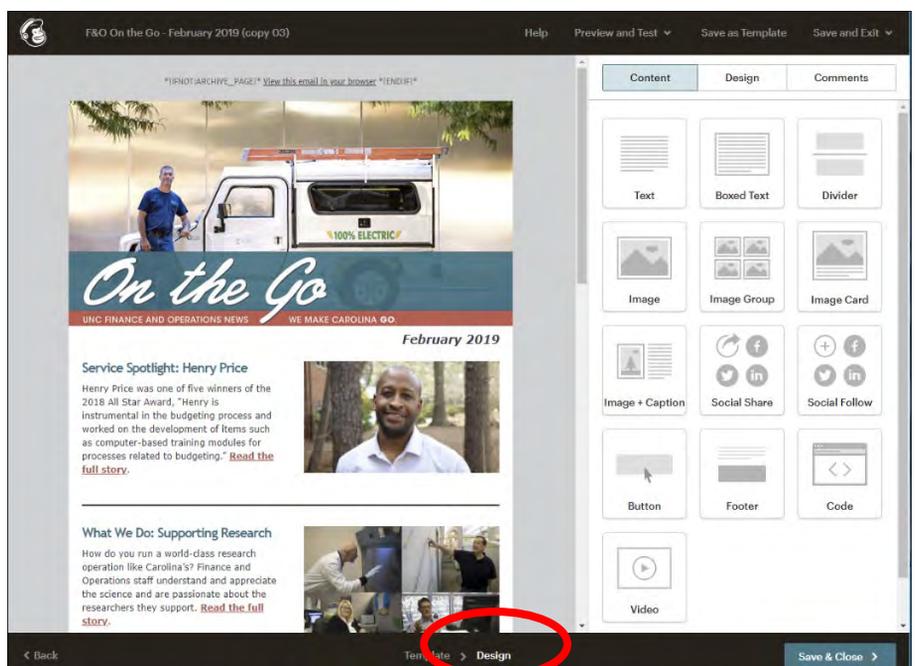
Sending the newsletter (email, campaign)

After saving your newsletter from the main editing page you will be taken to the "campaign dashboard." From here you can choose:

- "Finish later" to save your work and return to the main Campaigns dashboard.
- "Schedule" to choose a future date and time at which your email will be automatically sent, or
- "Send" to send your email to your subscribers right away.
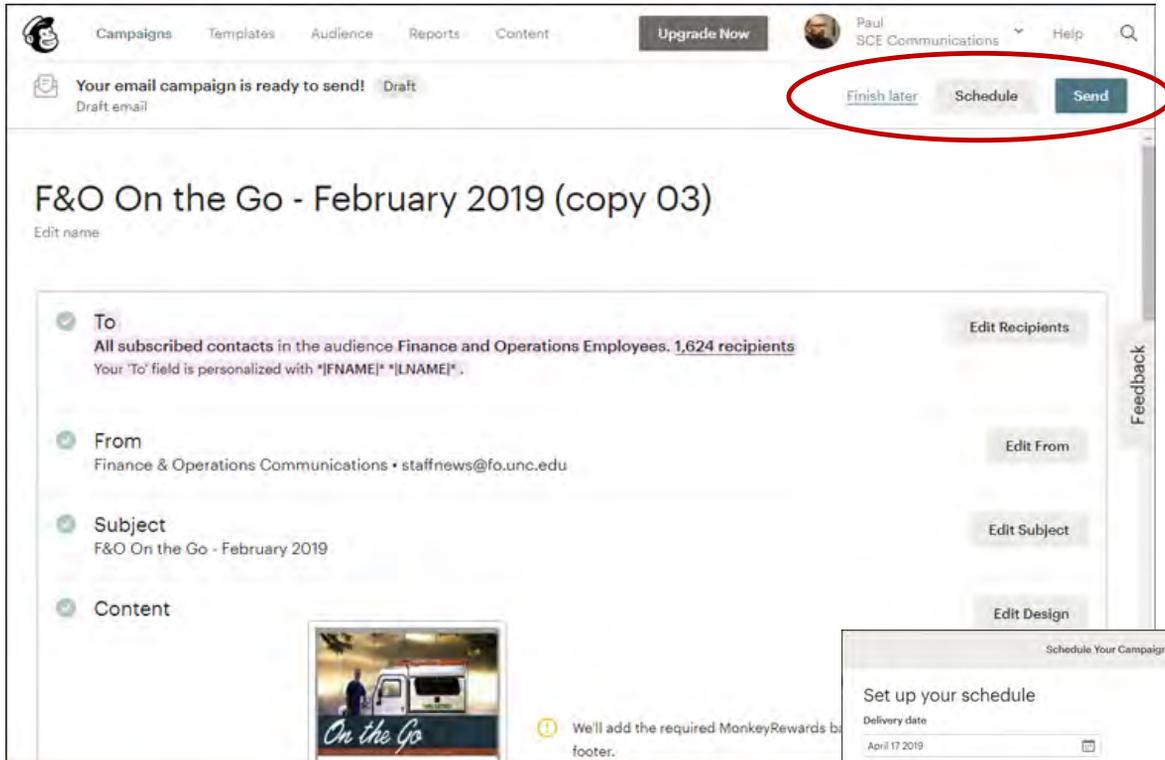
If you chose "Schedule" choose the date and time at which you'd like to send your email campaign.
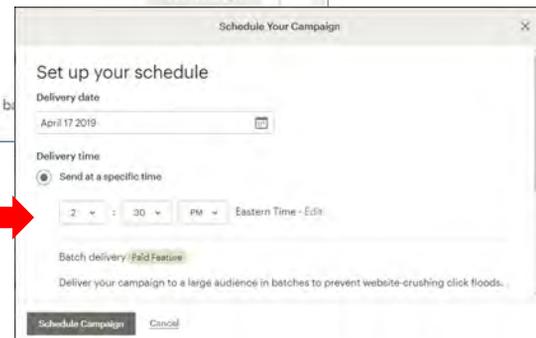
If you chose "Send" select "Send Now" to send your campaign immediately.

Once your campaign is sent, Mailchimp offers many reporting options for tracking your campaign deliveries and statistics on which of your stories are being viewed.

Please refer to their document, About Email Campaign Reports, for more information.