Setting Up the BOS MailChimp Feature

MailChimp is a global email marketing software platform. In the recent BOS upgrades, the Dollywood Foundation partnered with MailChimp to bring its services to affiliates of Dolly Parton's Imagination Library, for free or at discounted rates. This feature allows BOS Main Coordinators to easily send an e-newsletter directly to parents of children currently enrolled in your program. Users must be logged in as a Main Coordinator to see the MailChimp menu.

Discount Rates:
- For affiliates with 2,000 parent members or less, MailChimp accounts are free and those affiliates can send up to 12,000 free emails per month.
- For affiliates with more than 2,000 parent members, accounts are free and affiliates receive discounted sending credits when sending emails to their subscribers.

Why Use MailChimp:
***Note: The Dollywood Foundation prohibits affiliates from sending direct solicitations to parents of registered children.**
- Send professional newsletters quickly and easily
- Promote upcoming events and activities
- Ask parents to update their child's information
- *All communications within MailChimp adheres to international data protection and privacy policies.

How-to Create a MailChimp Account Connected to the BOS:
1. Only the "BOS Main Coordinator" can set-up a MailChimp Account. **Log into the BOS.**
2. From the home page, click the "Menu Icon" at the top left of the screen (three horizontal, parallel lines).
3. From the main menu, click "MailChimp."
4. Click **Create Account**.
5. Follow the on-screen prompts, filling out the appropriate contact and profile information.
6. Click **Subscribe**.
7. You will receive an email from MailChimp to activate your account.

How-to Create a Newsletter within MailChimp:
Once you have created your MailChimp account, **follow the step-by-step instructions at the resources** below to create a newsletter, import your child list of parents contact information, and send the newsletter out!
- **Dollywood BOS Support Video:**
  https://support.imaginationlibrary.com/customer/en/portal/articles/2553350-bos-3-0-mailchimp-menu-option-for-main-coordinators
- **MailChimp Guide**: https://mailchimp.com/resources/guides/getting-started-with-mailchimp/html/

How-to Import your Child List for Parent Contacts:
Once you have created your MailChimp account, you will want to import your child list of parens contact information!

First, you need to download your child list. **Follow the step-by-step instructions below to complete this step.**

How-to download your Child List and prepare for sorting:

1. Once you have logged into your BOS, click the "Menu Icon" at the top left of the home page (three horizontal, parallel lines).
2. From the main menu, click "Reports" and click "Child Lists."
3. Your affiliate program should appear on the screen, click "Go." This will download your book list into a csv document.
4. The document should appear in a minimized box at the bottom of your screen. Double click to open the document. If your document does not appear, go to the Downloads folder of your computer, and it will be there.
5. Once you have opened your child list, make sure you save it to your computer and keep it as a CSV file. You will need it to be CSV, not Excel, when you import it into MailChimp.
6. If there are any columns of the spreadsheet, you would like to delete, please feel free to do so. During the import process, each column will be added to your contact list in MailChimp. It is easier to maneuver the list if you get rid of unnecessary columns in your child list before importing. To delete a column, select it and right click, Delete.

How-to Import your Child List for Parent Contacts:

1. Once you have saved and cleaned up your child list. Log into MailChimp. You can do so from the MailChimp link within the BOS or at www.mailchimp.com.
2. Once you are logged into MailChimp, click "Lists" at the top of the page.
3. This takes you to a page where typically a list of your contacts will appear. Click "Create List" in the upper right-hand corner.
4. Click "Create List" from the pop-up gray section of the screen.
5. On the "Create List" page, enter in all of the appropriate information in the fields below. You can name your list, "Imagination Library Parent Contacts" or something similar. It might be helpful to add the date as well. The rest of the fields will apply certain settings to your contact list.
6. Click "Save" once you have filled out each field.
7. On the next page, you will see that there are no contacts in your new list. Click "Import Contacts."
8. Choose the "CSV or tab-delimited text file" option. Click "Next" in the bottom right corner of the screen.
9. On the next page, click "Browse" and find your child list you saved on your computer. This might be on your desktop or in the Downloads folder of your computer. Click "Next" once your child list is uploaded.
10. On the next screen, each column of data from your child list will be separated into different sections for you to match each one to a column that will appear in your contact list. This is basically how you will assign each column of your child list to match a column in MailChimp. For each column of information you want in MailChimp, i.e. Parent's Name, Email Address, etc., click "Make a Selection." For those columns of data you do not want to import into MailChimp, you can click "Skip."
11. From the drop-down menu, click each appropriate matching title if the title is already listed.
12. If the information title is not listed in the drop-down menu, click "New column name" under "Create a new column" section. Name the column appropriately for which type of information it is by entering the title in the field. Click "Save."
13. Once you have matched all columns, and you are pleased with the titles of each, click "Next" at the bottom right corner of the screen.
14. The next screen will confirm your import settings. Make sure it is set to import the number of columns of your choosing. Click "Import."

15. You will be taken to your contact list of all imported names. ALL DONE!

How-to Create your Newsletter aka Campaign:

1. Once you are logged into MailChimp, click "Campaigns" at the top of the screen.
2. Click "Create Campaign."
3. Click "Create an Email." Name your campaign appropriately i.e. Imagination Library Newsletter March 2018.
4. On the next screen, fill in the appropriate fields below.
5. Under To, click "Add Recipients." Choose your Imagination Library contact list you imported from your child list.
6. Under From, click "Add From" and enter the name and email address you want listed as the sender.
7. Under Subject, click "Add Subject" and enter in what you want listed as the subject of the email.
8. Under Content, click "Design Email."
9. On the next page, click the template you would like your email design to look like.
10. On the next page, add content to your template by clicking on each item. If you want to add/edit text, click on the text on the template. On the right-hand side of the screen, you will see a text box field to type in, change the color, etc.
11. Click "Add photo" on the image blocks to upload a photo from your computer.
12. Once you are pleased with your email visual, you can click "Save as template" at the top of the screen to be able to use this design format again without having to redo it. Click "Save and close."
13. You will be taken back to the campaign screen. From there, make sure your settings, the contact list and from field are correct.
14. Once you are ready to send the email campaign, click "Send" in the upper right-hand corner of the screen.
15. ALL DONE!