

Getting Started with Email Marketing





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About this Manual

Once your Constant Contact account is established, this manual will guide you through an overview to creating an email.

Getting Help

No matter where you are within your email, you can quickly get help the way you need it:

- Click the **Help** link in the upper right-hand corner to open the *Resource Center*
- Click the question-mark icon (?) for context-specific help
- Click the more information icon (i) to open a topic-specific help window
- Click the tutorial icon to view (?) an interactive tutorial on a specific feature

Section 1: Account Setup Procedures

Congratulations! You've signed up to use Constant Contact, and now have an account. These setup steps will ensure that you properly promote your company and brand. The basic steps are:

- Step 1** Verify your sending email address.
- Step 2** Specify your displayed organization information, set your email signature, and specify unsubscribe options.
- Step 3** Set up your interest groups and internal lists.
- Step 4** Set up your Join My Mailing List form.
- Step 5** Customize the automated Constant Contact welcome email.

Refer to the attached **Account Setup Checklist**. Items are marked as either **QS** (Quick Start) or **CS** (Complete Setup). Quick Start tasks need to be done before you create your first email. Complete Setup tasks need to be done, but you can go ahead and send an email before doing them.

Note

Constant Contact recommends you complete all tasks now, rather than later. It is easy to forget to do them later, and be surprised when something doesn't display quite the way you intended.

Step 1: Verifying Your Sending Email Address

Constant Contact needs to verify that you are using a legitimate email address to send an email.

1. You tell us the email address from which you want to send your email.
2. We send you a Verify Your Email Address email to that address inbox.
3. You respond, verifying that you authorize this email address to be used for your emails.

To verify your email address:

1. Click the My Settings tab.
2. Click Verify Address.
3. Scroll down to the Email Addresses to Verify section.
4. Type the email address to be verified in the text box.
5. Click **Send Verification Email**.
 - There are several different uses for these verified email addresses.
 - One is the Billing Contact, indicated by a (B) next to it in your account profile.

- One is the Account Contact to receive account and system-based messages, indicated by a (C) next to it in your account profile.
- Lastly, you can have one or several email addresses that you use for your emails for the From, Reply and Signature email addresses.

Step 2: Setting Your Email Display Information

It is important to set this up correctly, as this information is the default displayed in your emails. It also shows up in emails generated by Constant Contact, such as the Welcome email sent to a new contact after signing up for your emails.

Organization Information

This is your company or organization name, phone number, and website address that displays in your emails.

To set your organization name, URL, and phone number:

1. From the *My Settings* tab, click **Manage My Settings**.
2. Verify the **Organization Name** and **Website Address** is correct.
3. Click **Edit Organization Info**.
4. Enter an **Organization Phone**.
5. Upload your logo image or specify a path (URL) to your company logo.
 - You can link directly to the logo image on your website via the logo URL, or use Constant Contact's Image Hosting and upload a .gif or .jpg image instead. Constant Contact recommends uploading the logo via the Image Hosting to ensure it is always viewable in your emails. Your website URL can change, but you're not likely to change your logo.
6. Click **Save**.

Address Information

The CAN-SPAM Act anti-spam law requires a physical address to be included in every email you send. The information you enter here displays in the footer of all emails you send.

To specify a physical address:

1. From the *My Settings* tab, click **Manage My Settings**.
2. Click **Edit Address**, on the right.
3. Type the appropriate information in each text box. The boxes marked with an asterisk are mandatory.
4. Click **Save**.

Signature Information

Every email you send has some sort of signature, whether it's simply your name, your company logo, or a graphic that represents a signature and your email address.

To format your email signature:

1. From the *My Settings* tab, click **Manage My Settings**.
2. Click **Edit Signature Info**.
3. Type your **Signature name** as you wish it to display in your emails.
4. If you have verified more than one address, choose the email address you want displayed.
5. If you want to use a handwritten-type signature, upload the image or link to it.
 - For security purposes, you should not use your actual signature. Simply type your name in a script font, and

create a .gif or .jpg file of it.

6. Click **Save** to preserve your changes.

Authentication

Email Authentication is an industry standard designed to improve email deliverability. With authentication, your emails are recognized as legitimate by receiving ISPs and corporate domains who have adopted email authentication. This means that fewer of your emails will be filtered and more go into your contacts' inbox. Enable authentication for increased email deliverability.

To turn authentication on:

1. From the *My Settings* tab, click **Manage My Settings**.
2. Click the link, **Off**, next to **Authentication**.
3. Select **Enable Authentication with Constant Contact**.
4. Click **Save**.

Confirmed Opt-in

Confirmed Opt-in (a.k.a. double opt-in) is the most rigorous method of obtaining permission to send email communications. It requires a contact (email address owner) to respond to an email confirmation request in order to be added to your email list. If the contact does not respond, he or she will not receive any further email communications from you.

Confirmed Opt-in will not automatically confirm existing contacts or contacts that are manually imported into your account through Add/Import. These contacts will only get confirmed if a confirmation email is manually sent.

To turn this Confirmed Opt-in on:

1. From the *My Settings* tab, click **Manage My Settings**.
2. Set **Confirmed Opt-in** to **"On"** and click **Next**.
3. Read and check off each statement on the screen that displays and click **Finish**.

Once Confirmed Opt-in is enabled, the Join My Mailing List on your website requires new contacts to confirm permission with the confirmation email .

Language

To change the language for the non-editable text areas of your emails:

1. From the *My Settings* tab, click **Manage My Settings**.
2. In the *Other* section, click the hyperlinked language setting. For example, the default link is "English".
3. On the *Language Setting* page, click the dropdown box and select the language you wish to use.
4. Click **Save**.

Autosave

Autosave gives you the ability to automatically save your work every 5 minutes when you are on the Email Layout screen in the Email Wizard. This can help to avoid lost work due to session timeouts.

There is a timestamp display at the top and bottom of the Email Layout screen, indicating the last time the page was saved, either through Autosave or by clicking the **Save** button.

If you make changes to a text block and then hit the **Cancel** button, all changes that you made to that block will be discarded, even if an autosave occurred while you were working.

By default, Autosave is turned on. If you do not wish to use Autosave, you can turn it off in the *My Settings* section.

Email Message Setting - From Name

The “From Name” is the name that appears for your email in the “From” column of your contact’s inbox. You can edit the “From Name” for each email. To remain in compliance with CAN-SPAM your “From Name” should clearly identify the organization sending the email. That means that your “From Name” should almost always appear as your company name, possibly in conjunction with a department name such as Customer Support.

You can update the “From Name” that appears on the *Message Settings* page of the Email Wizard. If you choose, you can override the default “From Name” while you are composing your email.

Tip: At least one, and for best practices both, your From: address or From: name should be clearly recognizable as belonging to your organization. The “From Name” is an important piece of real estate because it - in conjunction with the subject line - can increase the likelihood of your email being opened. Your contacts signed up to receive emails from your organization, so they probably recognize your organization’s name. By including a recognizable name in the from line, your contacts will see that the email is from a reputable source and will be more likely to open it.

Note

Some older email clients may not show the “From Name” but rather the “From Email Address” instead. Most current clients show both the “From Name” and the email address; a few show only the “From Name”.

To update the “From Name”:

1. From the *My Settings* tab, click **Manage My Settings**.
2. Click the **Edit** link next to the From Name: existing title.
3. Type the new name.
4. Click **Save**.

Footer Options

The footer options displays at the bottom of every email you send. You can give contacts the option to update their information and add a comments box to your unsubscribe page.

To format the footer:

1. From the *My Settings* tab, click **Manage My Settings**.
2. Click **Edit Footer Info**.

Specify if you want to remove the “Update Profile/Email Address” link in your footer. **No** is the default.

3. Select **Yes** to display a comments box on your unsubscribe page.
 - Use this box to ask contacts why they are opting out of receiving emails from you.
4. Click **Save**.

Step 3: Creating Lists

When you create your list, Constant Contact provides a default list, General Interest.

Lists can be either “internal” or “external” lists. Internal lists are for your own classification purposes only, and are not meant to be displayed to potential new contacts when they sign up for your newsletter on your website. You will likely want to break your contact list into more meaningful categories to better target your emails. For example, these might include your customer list, preferred customer list, or vendor list. External categories are those you display on the *Join My Mailing List* form, for new contacts to select. For example, these might include signing up for your newsletter, company updates, or upcoming events.

Be careful not to display your internal lists on your *Join My Mailing List* form. For example, you may have an internal

list called “paying members”. This is NOT something you want contacts to sign up for; it’s an internal list for your own personal use, to select when deciding who will receive a particular email.

1. From the *Contacts* tab, go to the *My Lists* section and click the link: **Create New**.
2. Type the name of the list you wish to add.
3. You can check the “Join My Mailing List Form” box if you want contacts to see this list on your Join My Mailing List box form.
4. You can also check the “Autoresponder” box. This will trigger your autoresponder sequence when a contact is added to the list.
5. Click **Save & Add Contacts** to add email addresses to the new list.

You may want to rename the General Interest category to something more meaningful.

To edit or rename a list:

1. Click on the list to edit.
2. Click the **Edit** link next to the list name.
3. Type a new name for the list, and click **Save**.

Basic and Advanced Search

The basic search lets you find a contact by their Email Address, Last Name, State/Province (US/Canada), or Zip/Postal Code. The advanced search lets you find a contact by any contact field or search multiple fields (up to 5 at one time).

To search for contacts:

1. Go to **Contacts > Manage Contacts**.
2. Go to the **search** section.
3. Choose to remain in the **basic** search or click **Switch to advanced search**.
4. Select the type of search from the drop-down menu.
5. Select any additional conditions to narrow the search. The Last name and Zip code can only be searched by “begin with” or “match exactly.”
6. Click **Search**.
7. Click **OK** on the Confirm screen that pops up.

Note

The Advanced Search is not available for accounts with more than 50,000 active contacts or 100,000 combined contacts.

To save the results to a new or existing list:

1. Scroll down to search results.
2. Click **Save as List**.
3. Select which list you would like to save the results to or select the new list option and type in a list name.
4. Click **Add Contacts** to List.

Step 4: Join My Mailing List Form

The **Join My Mailing List** form is potentially used in many places:

- On your website to capture website visitors.
- When someone clicks on the **Update My Profile** link at the bottom of any email received, they see this form.
- When someone clicks on the **Forward Email** link at the bottom of any email received and the forwarding recipient clicks on **Subscribe Me**, they see the same Join My Mailing List form.
- When you add a Join My Mailing List link or box to your Facebook Fan page or to your Facebook profile page
- When you add a Join My Mailing List link or box to your Twitter profile

Join My Mailing List Report

You can then receive a **Join My Mailing List Report** listing all new and unsubscribed contacts. This report is sent via email when new contacts from your **Join My Mailing List Form** have been added to your account or existing contacts have unsubscribed from your account. It is either sent daily or weekly on the day of the week you select. The notice is only sent if there are signups or unsubscribes during that notice period. It includes contact email address and, if provided, first name, last name, and company name. You can have the report sent to any verified email address in your account.

Adding Join My Mailing List Form to Your Website

Constant Contact generates HTML for you to copy and paste into your website template. You can add a form, a button, or a simple, text hyperlink. If you prefer to create something completely different than the options we offer, your website designer can easily take our Join My Mailing List form code and apply this to your current website template.

To create and add a Join My Mailing List form to your website using the Constant Contact Wizard:

1. From the *Contacts* tab, click **Join My Mailing List**.
2. Under Step 1, click **Start Wizard to generate HTML code**.
3. Choose a style and click **Next**.
4. Pick colors, font style and edit text. You may want to use the internet (or Hex) colors currently used on your website.

Note

Consider using your company colors here. There are several free online tools to help you find the hex values (a numeric value assigned to web colors). You can also ask your website designer to provide these to you. Write these down; you will be using them again.

-
5. Click **Next**.
 6. Click **Preview** to see what the HTML looks like, and verify it's ok.
 7. Close the preview window and click **Finish**.

Customizing Join My Mailing List Form

Customize the form visitors to your website see when they signup - edit Join My Mailing List form text, add your logo, and select contact details to capture on the form.

Note

It is important to customize this form even if you don't have Join My Mailing List on your website, as information from this page is used in several different places; at the bottom of every email you send, in the Forward Email feature, and the Update Profile/Email Address feature, and the Confirm link in the Permission Reminder.

To customize the Join My Mailing List Form:

1. Under Step 2, click **Edit Join My Mailing List Form**.
2. In the introduction, insert your company, logo from the *Image Library*, or specify the path to your logo on your company website.
3. Edit the Header if you like. Customize the Introductory Paragraph to reflect your company or organization.
4. Click the link **Lists** located on the left-hand side of the screen.
5. Edit the Subheader and Description, if you like.
6. Make sure the correct lists are displaying. Edit them if necessary by clicking on the list.
7. Click **Save Changes**, then click the link **Contact Info** located on the left-hand side of the screen.
8. Edit the Subheader and Description, if you like.
9. Select the Questions you want displayed by clicking the respective **Display** or **Required** checkbox. Specify the order in which you wish the questions to display by entering numbers in the **Order** boxes.

Note

- Be careful not to require too much information. If you require too much information, you risk the possibility of people getting frustrated and simply leaving your site without subscribing.
- Delete the sentence about required fields using the * if you don't have any required fields.

-
10. Click **Save**, then click the link **Options** located on the left-hand side of the screen.
 11. Click the box to offer text-only emails as a convenience for your contacts.
 12. Click the link **Colors** located on the left-hand side of the screen.
 13. Enter the hex values for the desired Text Color and Background Color.
 14. Click **Save**, then click **Finish**.

Step 5: Customizing Constant Contact Automated Emails

Constant Contact sends several automated emails to your contacts:

- Welcome email - Sent to new contacts.
- Change of interest email - Sent to contacts who change their list preferences.
- Update profile email - Sent to contacts who change their email profile.
- Forward to a friend email - Sent when a contacts clicks the "Forward Email to a Friend" link.

It is important to set these emails to display the way you want and activate them, now, before sending out emails. Setting these things up now, before you get busy, is the best way to ensure it doesn't get overlooked, and that these emails represent your corporate brand effectively.

Welcome, Change of Interest, and Update Profile Emails

To set up each contact email:

1. Under Step 3, on the *Join My Mailing List* screen, click **Welcome Email** (or **Change of Interest Email**, or **Update Profile Email**).
2. In the *Message Header* section, edit the Subject. Make sure the "From Name" is something your contacts will recognize. If you have more than one verified email address, choose the one you want to use to welcome new contacts. Verify the Permission Reminder is set to on. Click **Next**.

Note

As you proceed through the Email Wizard, make sure your default names are correct. If you used a shorter name to get through the sign-up process, that name will display as the default.

In the **Introduction**, insert your company logo from the Image Library, or specify the path to our logo (its URL) on your company website. Click **Next**.

3. Customize the Title, Subtitle, Greeting, and Introductory Paragraph. Consider changing the greeting to something more friendly, such as “Dear Donor” or “Dear Valued Customer”. Click **Next**.
 4. Customize the paragraph text to reflect your company or organization. Click **Next**.
-

Note

Constant Contact recommends you edit this text as little as possible.

5. Customize the closing, if you like, Click **Next**.
 6. Customize the email signature. If you want to use a handwritten-type signature, upload the image or link to it.
-

Note

For security purposes, you should not use your actual signature. Simply type your name in a script font, and create a .gif or .jpg file of it

7. Verify all the signature information is correct. You need to set these for each of the contact emails. Click **Next**.
 8. Enter the Hex color values for the desired Text Color and Background Color.
 9. Ensure the Footer information is correct. Customize the text for the Forward Email and Subscribe Me features, if desired. Click **Save & Next**.
 10. Make sure **Activate your changes** is selected, and click **Finish** to apply your edits to your emails.
-

Forward to a Friend Form and Email

Now let's set up the Forward to a Friend form and email.

To customize the Forward to a Friend feature:

1. From the *My Settings* tab, click **Email Features**.
2. Under Step 2, click **Customize Your Forward Email to a Friend form**.
3. In the *Form Text* section, edit the Page Title as desired.
4. In the Organization Logo, insert your company logo from the Image Library, or specify the path to your logo (its URL) on your company website.
5. In the Introductory Paragraph, fill in the box to send a personalized copy of this email to your friend(s). Click **Next**.
6. Enter the Hex color values for the desired Text Color and Background Color, and click **Finish**.
7. Under Step 3, click **Edit Your Forward Email to a Friend Email**.
8. Customize the Greeting and Introductory Paragraph. Consider changing the greeting to something more friendly, such as “Dear Donor” or “Dear Valued Customer”. Click **Next**.
9. Verify your address, and click Next.
10. Select **Activate Your Changes** to apply your edits, and click **Finish**.

Account Setup Checklist

There are a number of setup tasks that must be completed before creating and sending your first email. Some items are optional, but are important to ensure you are properly promoting your company and brand via your emails. Follow this checklist to make sure you completely set up your account.

Items are marked as either **QS (Quick Start)** or **CS (Complete Setup)**. Quick Start tasks need to be done before you create your first email. Complete Setup tasks need to be done, but you can go ahead and send an email before doing them.

Note

Constant Contact recommends you complete all tasks now, rather than later. It is easy to forget to do them later, and be surprised when something doesn't display quite the way you intended.

Verify Your Sending Email Address

- QS** Verify your sending email addresses. If you are using different emails for billing, contact, From, Reply, or Signature, verify those also.

Set Your Email Display Information

- QS** Specify your organization information (name, phone number, website address).
- QS** Specify a physical address to display in the footer of your emails.
- CS** Specify how you want your signature to display in your emails.
- QS** Enable authentication.
- QS** Enable Confirmed Opt-in.
- QS** Customize Language.
- QS** Specify and confirm "From Name".
- CS** Set footer display options.
 - Keep the Update Profile/Email Address link.
 - Display a comments box on your unsubscribe page.

Create Interest Categories and Internal Lists

- QS** Set up your interest categories.

Format Join My Mailing List Form

- CS** Add a Join My Mailing List form to your website.
 - Customize the notification email text as desired.
 - Specify colors and upload/link to your company's logo.
 - Ensure your email address is correct.
- QS** Customize the Join My Mailing List form.
 - Upload or link to your company's logo.
 - Customize the text to your company.
 - Edit your interest categories as desired.
 - Specify the contact information you want to collect.
 - Offer text-only emails.

- Set colors to match your company colors.

Customize Constant Contact Automated Contact Emails

CS Customize the Welcome email that is sent to new contacts.

- Upload or link to your company's logo.

- Customize the text to your company.

- Set colors to match your company colors.

CS Customize the change-of-interest email.

- Upload or link to your company's logo.

- Customize the text to your company.

- Set colors to match your company colors.

CS Customize the update profile email.

- Upload or link to your company's logo.

- Customize the text to your company.

- Set colors to match your company colors.

Customize Forward to a Friend Form and Email

CS Customize the link names.

CS Customize the Forward to a Friend form.

- Upload or link to your company's logo.

- Customize the text to your company.

- Set colors to match your company colors.

CS Customize the Forward to a Friend email.

- Enter your address information.

- Activate your changes.

Section 2: Your First Email: A Step-by-Step Guide

Using Constant Contact to create professional email communications just got easier. This helpful guide walks you through creating your first email with the Email Wizard.

First, we will guide you through an overview of the Constant Contact email interface.

1. The **Emails** tab allows you to create and manage your emails. This is where you can create new emails, view **Reports**, and **Remove** and **Restore** emails from the **View** list.
2. The **Autoresponder** feature gives you the ability to make a strong first impression to your new list subscribers by automatically sending out a specific email soon after they opt-in to your list. For example, you can designate a specific letter to be sent out to a new subscriber the day after they sign up for your list from an invitation from your website or email. You can then send out subsequent Autoresponders at time intervals such as 1 or two weeks days 14 days to firmly establish a sound business relationship with your subscribers. As a result, new subscribers will see the benefits of what you have to offer without having to wait a long time for the next group emailing.

Note

The **Autoresponder** feature does not work with custom created emails (emails that do not use the Constant Contact templates).

3. If you purchase **Email Archive**, you can create a web page with links to previously sent emails. Constant Contact will host the page, and you can provide the link in your emails, or on your web site.
4. On the **Contacts** tab you can create and manage your contacts and lists. You can run reports, and you can export your contacts to a file such as Microsoft Excel. You can also manage bounced emails and monitor list activity from this screen. In this screen, you can also create a *Join My Mailing List* box so that visitors to your website will be able to sign up for your email communications.
5. The **Library** tab is where you can manage the images and .pdf documents you use in your emails. The **MyLibrary** allows you to store up to five images and five .pdf documents in your Constant Contact account. If you upgrade to **MyLibrary Plus**, you will receive up to 50 megabytes of image and .pdf document storage and access to thousands of stock images in the **Stock Image Gallery** to use in your emails, surveys and event marketing.
6. The **My Settings** tab is where you can edit the information for your organization, signature information, message settings “from name” and footer options. You can verify additional email addresses, and customize email features such as forward-to-a-friend pages.

Note

If you are a new Constant Contact user, make sure to set up your account before following these steps.

There are several steps to creating an email in the Wizard:

1. Creating an account.
2. Verifying your sending email.
3. Creating an email:
 - Choosing a template to use.
 - Filling that template with captivating text.
 - Formatting the template to personalize its appearance.
4. Uploading your contact list.
5. Sending your email.

Step 1: Creating an Account

Please refer to Section 1: Account Setup Procedures.

Step 2: Verifying Your Sending Email

Constant Contact needs to verify that you are using a legitimate email address to send an email. We dislike spammers as much as you do, and this is a simple first step to keep them from using our product to clutter mailboxes.

The idea is simple:

1. You tell us the email address from which you want to send your email.
2. We send you an email to that address, asking you to respond.
3. You respond, verifying that you did indeed receive the email from Constant Contact.

To verify your email address:

1. Click the **My Settings** tab.
2. Click **Verify Address**.
3. Scroll down to the Email Addresses to verify section.
4. Type the email address to be verified (your sending email address) in the text box.
5. Click **Send Verification Email**.

Step 3: Creating an Email

Constant Contact has designed a wide variety of layouts (called “templates”) for you to use -- all you need to do is pick one and fill it in with your information.

Before you can do that, though, you need to do the following:

1. Click the **Emails** tab.
2. Click **Create**.
3. Enter an email name. This name is NOT displayed in your emails. It is for your personal use, to help you identify each unique email.
4. Click **Next**.

Choosing a Template

You are now looking at the **Template Selection** page which allows you to choose a template for your email.

The template categories are shown on the left with samples for each category on the right. The number next to the category name represents the number of templates available in that category. If you want more information about any of the templates, click the link labeled **View Details** located below the image of the template.

1. Choose a template category in the left column
2. Click **Next**.

Filling in the Template

The Email Wizard guides you through the different sections of the template. All you have to do is fill in the blanks and you have a customized mailing!

Message Settings

The first section of any template is the **Message Settings**.

Fill in the fields:

1. The **Subject** box is what your email recipients will see. Highlight the text that is already there and type your own

subject over it.

2. If you want to change the **From Name**, highlight the text and type over it. Make sure it is a name that your email recipients know, such as a company name.
3. The **From** and **Reply Email Address** is the email address that you have verified with Constant Contact. If you verified more than one email, you can choose which one to use.
4. Turn the **Permission Reminder** on by clicking **On**. This adds a short paragraph of text at the top of your emails, reminding your contacts that they have a relationship with you.
5. If you choose to, you can include a link at the top of your email allowing contacts who cannot view images in their email program to open your email in a browser window. If you choose this option, a webpage version of your email will automatically be created once your email is sent. The webpage version will remain available for thirty days after the email has been sent. You may change the default text in the *Text* and *Link* fields as necessary.
6. Select both options in the **Forward Email to a Friend** section.
7. Click **Save** to save your work.
8. Click **Next** to continue.

Email Layout Page

You are now looking at a draft of your email on the Email Layout Page. By using the features below you can modify and customize the template.

Add Blocks

Global Colors and Fonts

Editing an Image

MyLibrary and MyLibrary Plus

Inserting a Document

Stock Image Gallery

Editing Text Block Options

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Add Blocks

A block is the portion of an email that you can add, move, edit, copy or delete. A block is usually comprised of a

header and at least one paragraph. It can also include links and images. There are three graphic icons at the top of each block. The edit  button allows you to edit the text in the block. The copy  button inserts another copy of that specific block, which can then be customized, and the delete  button will simply delete the block from the email.

If you find that a template does not have enough articles, promotions, coupons and so forth, you can add these specific blocks using the template editing toolbar. You can add as many blocks to your email as you need, until you reach a total of 100 blocks.

A block panel or column is a section of the email that contains one or more blocks.

To add a block within an email,

1. Click **Add Blocks** on the left column.
2. Click the **Add** button beside the type of block you wish to add.

The block will appear at the bottom of the section in which it belongs. For example, if you add a logo block, it will appear at the top of your email. If there is already a logo and you add another one, the new logo will appear beneath the existing logo. Once you have added a block, you can move it around within your email.

To move a block:

1. Move your cursor over the title bar of the block you would like to move. The cursor will change to a four-arrow icon.
2. Press and hold the mouse and drag the block to the location where you would like to move it.
3. Release your mouse button when you have reached the spot where you would like the block to appear.

Note

Depending on where you move a block, it will take on the default color and fonts (i.e., background color) of the panel. However, any inline style changes that you made to the contents of the block will remain.

Global Colors and Fonts

In the Global Colors and Fonts menu, you can change the look and feel of your email by changing the default colors, fonts and background images. The changes you make are instantaneous. For example, when you change the font for the main text, the changes are reflected immediately in the email.

To edit color:

1. Click the color change icon for the element you wish to modify.
2. In the color picker that displays, select the color you wish to use. You can click on one of the colors in the box or enter the hex value of the color you wish to use.

To edit text:

1. Click the drop-down button for the element you wish to modify.
2. Select the text style or size that you wish to use.


Note:

Click the **Restore Defaults** to undo your font and color changes.

Editing an Image

You can edit an image by using the editing tool.

To edit an image:

1. Click the **Edit** icon  button for the block that contains the image you would like to edit.
2. Right-click on the image you wish to edit. The menu options display: **Change, Resize, Delete, Align, Remove Alignment.**
3. Select the menu choice.

Note

If you click **Change** the Select Image window will open to then choose your image.

MyLibrary and MyLibrary Plus - Image and Document Library


You can access **MyLibrary** and **MyLibraryPlus** by the **Library** tab. From the **Library** tab, you will see **MyLibrary** and **MyLibrary Plus**. There are two main areas in this screen; the image link and documents link. When you click on the images link you will see where your hosted images will be displayed, and the “Upload an Image” section where you can upload images to your Constant Contact account. When you click on the documents link you will see where your hosted .pdf documents will be displayed as well as the Upload a new document button. The account usage indicator tells you how many megabytes you have left available.

You can also access **MyLibrary** and **MyLibrary Plus** from the **Select Image or Select Document** window that open when you edit/insert your image or document from the **Email Layout** page. In the **Select Image** window there are two tabs. The **Insert From Image Library** tab allows you to access your image library, and the other tab, **Enter Image URL** allows you to use a URL address.

Inserting a Document

In the **Email Layout** page, you will see the document link to insert into the newsletter.

To insert the document:

1. Click on the **Edit**  icon button in a block.
2. Click the **Document** button under the Insert section. The **Select Document** window will open to then choose your document.
3. Click on the radio button next the document you want and then type in the link text that your subscribers will see in the newsletter.
4. After you are finished, click **Insert Document**. Check the **Disable Link Tracking** box, if you want the link tracking turned off.

Now when your subscriber receives the newsletter or invitation, they will click on the link and the .pdf document opens in a new window. If the subscriber clicks on a link to a document that has been deleted, they will get a message letting them know that the document is no longer available for viewing.

Note

Please note that you can only upload **.pdf file format** documents to your Constant Contact accounts.

Uploading a Document

To **upload** a document from your computer to the Document Library:

1. On the main toolbar, click the Library tab.
2. Go to **Documents**.
3. Click **Upload** a new document. In the new window that appears, click **Browse**.
4. Locate a document on your computer and click **Open**.

For MyLibrary Plus subscribers only: Select the folder where you wish to host the document from the Select a folder dropdown. If you wish to create a new folder, click Create new folder.

5. Click **Upload**.

Note:

Clicking Cancel will abort the upload. The document will not appear in your list of available files and will not be hosted.

Replacing a Document

If you sent an email containing a link to a document in error, you can replace the incorrect document with a new file.

1. On the main toolbar, click the Library tab.
2. Go to **Documents**.
3. Locate the document you sent in error on the Documents page, and click **Replace**.
4. In the new dialog window that appears, click **Browse**.
5. Locate a document on your computer and click **Open**.
6. Click **Replace**.

Stock Image Gallery

Click the **Stock Image Gallery** link, from the **MyLibrary Plus Image Library**, to access thousands of images that may be used in your emails, surveys and event marketing. The image categories are listed on the left with a thumbnail view of the image on the right. Click the category links to view images in that category. You can also use keywords to narrow your search within a category. Moving your mouse over a thumbnail will display the full-sized image. And underneath the image thumbnail is the name, size, and dimensions of the image.

To add an image to your account:

1. Click the **Add Image** button below the image. You will see a message letting you know that the image has been added to the **My Stock Images** folder.

To view the stock images in your account:

1. Click the link to **Return to the Image Library**.
2. Click on the **My Stock Images** folder.
3. When you open the **My Stock Images** folder, you will see the images that have been added from the gallery.

To delete an image:

1. Click the **Manage My Stock Images** link from the Image Library.
2. Select the image.
3. Click **Delete**.

Note:

To find out more information about Images, MyLibrary, MyLibrary Plus and Stock Image Gallery, please refer to the FAQs located in the *Resource Center*.

To insert an image:

4. Click the **Edit** icon  in the article block.
5. Under the Insert heading on the left, click **Image**.
6. The **Select Image** window opens, with the **Insert from Image Library** tab.

7. If you haven't uploaded an image to the Image Library yet, click **Upload a New Image**.
8. Click **Browse** to browse your computer for an image file, and select one.
9. Type a short description of the image in the **Description** block. This is text that displays in your email if, for some reason, your image isn't seen.
10. Click **Upload image**.
11. In the **Make Image a Clickable Link** text box, type an URL. For example, "http://www.mycompanywebsite.com."
12. The **Align** section is where the image will appear in relation to surrounding text. For example, "Left" align will keep the image to the left, with any text wrapping on the right-hand side of the image.
13. Click **Insert Image**.
14. If you want to resize the image, right-click with your mouse on the image and then click the link **Resize**. The **Resize Image** window will appear and you can then modify your image. After you are finished, close the **Resize Image** window.
15. Save your changes by clicking **Save** at the top of the block.
16. Click **Preview** and click on your image to see how it works. Click **Exit Preview** when you are done.


Note

Click **Preview** to see what your email will look like. You can check your work at any time.

Editing Text Block Options

In each block you will see generic text that will help you get started with writing your own text.

To edit text in a block:

1. Click the **Edit** icon  on the block that contains the text you wish to change.
2. Highlight the text you want to edit.
3. Under *Text Formatting* on the block editing toolbar:
 - Change the font type by clicking the font data drop down box and selecting a new font.
 - Change the font size by clicking the font size drop down box and selecting a new size.
 - Bold, italicize, or underline the text by highlighting the text and clicking the appropriate style icons.
 - Change the font color by highlighting the text and clicking the **Font Color** button . Select a new color from the color picker and click **Use New Color**.
4. Click **Save** on the block and **Preview** to see what your email will look like.

Paste with Formatting

By default, **Paste with Formatting** is checked off to let you easily paste formatted text from other original sources such as Microsoft Word. The text will then paste in the way it was formatted from the original source. You should uncheck **Paste with Formatting**, if you want to paste in text and have the text automatically format to the templates font style and color.

Insert Link

The **Insert Link** option allows you to insert a link into a block. When you click on the insert link button in a block, the **Insert Link** window comes up. The window is where you fill out the information that controls which words will be clicked and where the link will go. We recommend that you not use the actual URL for the Text to Display. Because Constant Contact redirects links in order to track them in your reports, some anti-phishing filters will disable the link

or possibly block the email.

Insert Facebook, LinkedIn, or Twitter Link

The **Insert Facebook, LinkedIn, or Twitter Link** option allows you to enter the link directly into an email.

To insert a link for either your Facebook, LinkedIn, or Twitter account directly into an email:

1. Click on the Email Marketing tab.
2. Click on the email you want to insert the link into.
3. Find the block where the link will go into.
4. Click the **Edit** icon.
5. Under **Insert**, click on either the **Facebook, LinkedIn, or Twitter** icon.
6. In the window that appears, choose either:
 - View our profile on ...
 - View my profile on ...
 - One of the three different sized social media icons
7. Follow the instructions under the **Link** box within the window to obtain the unique social media link.
8. Click **Save & Close**.

Note

Make sure your Facebook profiles can be searched and found by people who are not your friends. If people are encountering problems finding the profile, check your privacy settings.



Insert Contact Details

The **Insert Contact Details** option allows you to enter dynamic data fields, so that each contact will see the information you have stored for them for the selected property. If no data exists in the selected property for that contact, the field will appear blank.

Anchor Tag

Anchor tags allow you to link to different parts of your email. For example, you might create a “Back to top” link that, when clicked, brings the reader to the top of your email.

To create an anchor and its associated link:

1. Click the **Edit** icon  on the block where you would like to insert an anchor. If you are creating a “Back to top” link, for example, you will insert the anchor in a block at the top of your email.
2. In the left pane, click **More Insert Options** and select **Anchor**.
3. In the **Insert Anchor** box that displays, enter the name for the anchor and click **Save**. This name will not be visible to your customers. For example, you might name it “top”. An anchor icon will display within the block where you inserted the anchor.
4. Click **Save** on the block.
5. Click the **Edit** icon  on the block where you would like to insert the link. For example, if you are creating a “Back to top” link, you might want to insert the link at the bottom of your email.
6. Place your cursor where you would like to add the link.

In the left pane, click the **Insert Link** button.

7. In the pop-up box that displays, type the text of the link. For example, “Back to top”.

8. For link type, select the **Anchor** radio button.
9. In the dropdown box that displays, select the anchor you want to link to. For example, “top”.
10. Click **Insert**.
11. Click **Save** on the block.

Note

Anchor tags work only if you enter data into a block. If you add an anchor to an empty block, it will not work properly.

Greeting Option

The **Greeting** option allows you to add a personalized greeting when the contact’s information is available. This option is located under **More Insert Options**.

Forward to a Friend link

The **Forward to a Friend** link adds a text or image link to your email, allowing the receivers to forward the same email on to others. This option is located under **More Insert Options**.

Survey Link

The **Survey Link** option allows you to add a link to a selected Survey. This option is located under **More Insert Options**.

Paypal Link

The **Paypal Link** option allows you to insert a PayPal link. This option is located under **More Insert Options**.

Amazon Link

The **Amazon Link** option allows you to insert a Amazon link. This option is located in the drop-down menu under **More Insert Options**.

HTML Codeview

If you are proficient in HTML you can also make modifications to your email by clicking the **Code View** button. Once you have modified the code, click the **Update** button to view your changes in the block, or click **Update and Close** to update the block and exit Code View.

Advanced Features

If you expand the **Advanced Features** link you will see the **Edit Style Sheet** link and **Edit Text Version** link.

The Edit Style Sheet should only be used if you are familiar with HTML. You can modify styles included in the email, including column widths.

The text version of your email is automatically generated from your email layout. So you can also edit the text version.

Preview Mode

You can check your work at anytime by clicking the **Preview** button. In the preview mode, you can send up to 5 email addresses a test email to see how the email looks once mailed. Simply enter the email addresses, separated by a comma. You can also include a personalized note.

You can choose to send both HTML and text versions of the email by checking the check box.

1. To send the test email, click the **Send** button.

2. To switch back into edit mode, click the **Exit Preview** button.
3. Click **Save and Continue** if you satisfied with your email layout.

Step 4: Uploading Email Lists

You are now on the *List Selection* page. Check **General Interest**, and click the link **Add**. Here you will add some names to your contact list. You can add contact email addresses to your list, either individually type or copy (Ctrl C) and paste (Ctrl V) your email list into the **Addresses to Add** text box. Then click **Save**.

You may add more contacts at any time under the **Contacts** tab:

1. Click the **Contacts** tab.
2. Click **Add/Import**.
3. Select General Interest and click **Next**.
4. Select the first option, Type or copy my email addresses into Constant Contact, and click **Next**.
5. Type one or two email addresses into the text box. Press the <Enter> key after each address.
6. Click **Submit Data**.

Now you can schedule your email to be sent.

Step 5: Sending Your Email

You need to tell Constant Contact when to send your email:

1. Click the **Emails** tab, and click your email name.
2. Click the link **Select Lists** on the bottom left corner of the screen and choose the list(s) by clicking the checkbox(es) next to the list name. Then click **Save**.
3. Click the link **Schedule Email** on the bottom right corner of the screen.
4. Select **Send Now** and click **Save**, or select **Scheduled for**, enter a date in the Date field, and click **Save**.

If you purchase **Email Archive**, you can click the checkbox to automatically archive an email once it has been sent. And then click the checkbox **Add the Share button to this email's footer**. Using the Share button, your contacts can link to this email on social networking sites such as Facebook, Twitter, and Digg.

Viewing Reports

Once your emails have been sent, you will want to click the **Reports** link to view the results.

The Email Statistics Graph is a visual representation of the reported data for past emails. This graph displays the number of emails sent as well as the number of bounces, the open rates, and the click rates for those emails. In addition, the average open rate and average click rate for an account's chosen industry is also displayed. If no industry has been indicated on the account, this information won't be available. However, you can select an industry at any time.

The comparative metrics shows the results of your overall emails as well as the results of your emails sent in the last three months. Emails that have been removed are excluded from these reports. Click on the linked count to view details on bounces, spam reports, opt-outs, opens, clicks, or forwards.

Getting Help

- Click the **Help** link in the upper right-hand corner to open the *Resource Center*
- Click the question-mark icon (?) for context-specific help
- Click the more information icon (i) to open a topic-specific help window
- Click the tutorial icon to view (?) an interactive tutorial on a specific feature