HOW-TO GUIDE | EMAIL MARKETING

How to Add and Update Your Contacts

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Preview Your Options and Resources

This guide helps you to add new contacts to, and update your existing contacts' information in, Constant Contact. Here is a summary of everything this guide does and does not cover.

What this Guide Covers

You will find help with several topics related to adding and updating contacts in the following sections.

• Learn and follow the contact permission policy

Section 1 provides brief answers to questions about how to:

- Follow the permission policy requirements
- Collect permission-based contacts
- Avoid getting spam complaints from contacts who opted into your mailing list

It also explains why the permission policy is strictly enforced.

Select lists for new contacts before you add them

You cannot add new contacts into your Constant Contact account without first creating and selecting contact lists for them. The beginning of *Section 2* explains what you need to keep in mind when creating and selecting lists for your new contacts.

- Select and use the method for adding and updating contacts that will be most efficient for you The best way to add new contacts, or update existing contacts' details, in Constant Contact depends on:
 - Where the contact information is currently stored If your permission-based contact list is currently stored in another software application or database, you may be able to use a **contact import tool** instead of a standard method explained in this guide. See the next page for details.
 - The number of email addresses and details you need to add or update *Sections 2* and *3* will help you to select and use the standard method that will be most efficient for you.

• Use contact details and custom fields

Section 4 explains what types of information you can add with email addresses, how many characters each detail can have, and more.

Select contact data labels

If you are importing contacts in a file, and you did not label the contact details in the file correctly, you will encounter a 'Select how to label your data' page during the import process. *Section 5* provides instructions for using this data label matching tool.

• Find help with miscellaneous issues

Section 6 provides answers questions about topics such as:

- Adding back opted out contacts
- Managing **duplicate** email addresses
- Resolving import errors

And more

• Learn technical terms and contact management lingo

If you see a word or technical term that you do not understand, look for a definition in the *Glossary* at the end of this guide.

Alternative Options not Covered in this Guide

The following helpful, but non-essential, options for adding and updating contacts are not covered in this guide:

Import Tools

If your permission-based contact list is stored in any of the following applications, you can use an import tool to transfer it directly into your Constant Contact account:

- Microsoft[®] Outlook[®]
- Microsoft[®] Outlook Express[®] and Windows[®] Mail
- Intuit[®] QuickBooks[®]
- ACT![®] by Sage[®]
- Salesforce[®]
- QuickView[®] iPhone Application

To download a contact import tool, click the **Contacts** tab in your Constant Contact account. Then click the "Import Tools" link in the My Contacts section of the resulting page.

To get help installing or using a contact import tool, visit:

http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=3798

If your permission-based contact information is in:

- Gmail or Google Mail (My Contacts list only), see Appendix IV at the end of this guide.
- A database or email client not listed above, you may be able to export the list into a file and import the file into Constant Contact (see Section 2 to format and import the file). Need help exporting your contacts from your email client? Visit: http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_fagid=2652
- Your own application, you may be able to use an Application Programming Interface (see below).

Join My Mailing List Form

Anyone who joins your list through your online **Join My Mailing List form** will be added to your account automatically. To create a Join My Mailing List form, select the **Contacts** tab in your Constant Contact account and click the "Join My Mailing List" link just below the tabs.

Application Programming Interfaces

You can integrate Constant Contact directly into your software program with Constant Contact's Application Programming Interfaces (APIs) if you have software development skills (or access to a web developer). Visit our AppConnect website at: http://developer.constantcontact.com

Contact Capture Tool

To quickly add or update one contact at a time without opening a web browser, use Contact Capture Tool. Use it to update your contact lists directly from your Macintosh or Windows desktop. Learn more: <u>http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_fagid=3293</u>

1. Learn and Follow the Contact Permission Policy

All contacts that you add to your Constant Contact account must be **permission-based**. To understand how and why you must follow the permission policy requirements, review the answers to the following questions:

- How do I *follow* the permission policy?
- How can I collect permission-based contacts?
- Why do permission-based contacts report my email as spam?
- How can I avoid getting spam complaints?
- What are the *consequences of violating* the permission policy?
- Why is the permission policy required and strictly enforced?

How do I Follow the Permission Policy?

Only use Constant Contact to send email to contacts that meet *all* of the following criteria:

- They have given you, or your organization, prior consent to send them email.
- They are not from a list that has been purchased, rented, appended, or given to you by a third party.
- They do not have distribution lists or **role addresses** E.g. email addresses that may be received by more than one individual: sales@, support@, users@, list@, etc. (These are email addresses that can belong to more than one person and have a higher likelihood of being marked as spam).
- They are not email addresses that you captured from your address book without prior consent (including but not limited to: user group addresses, transactional addresses or auto-response addresses). Although it may be possible to add these types of addresses (such as Craigslist and Yahoo! Group email addresses) to your contact lists, Constant Contact will not send to them and you must remove them.

How can I Collect Permission-Based Contacts?

Resources you can use to collect permission-based contacts include:

- Join My Mailing List Create a customizable online Join My Mailing List signup form with Constant Contact. Contacts who sign up through this form, are automatically added to your account.
- **Survey** Use a "Collect Personal Information" question type in a Constant Contact online survey and allow anonymous participants who access your survey through a webpage to join your mailing list.
- Paper signup form Display a hardcopy signup form in your store front, at meetings, and during events. To download a printable signup form from Constant Contact, go to:
 <u>http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=1154</u>

To find more in-depth resources that will teach you how to collect permission-based contacts, see Section 7.

Why do Permission-Based Contacts Report my Email as Spam?

Even contacts who have asked to sign up for your mailing list may report your email as spam if:

• They do not recognize the name in your email's From and Subject line

- They do not remember opting into your list or they opted in accidentally
- They change their mind and no longer want to receive email from you

How can I Avoid Getting Spam Complaints from my Permission-Based Contacts?

Two ways you can reduce your chances of getting spam complaints from contacts who opted into receiving your emails include:

• Turn the "Permission Reminder" on in every email you send.

The Permission Reminder is a standard message that appears at the top of your email. It reminds your contacts why they are receiving your email and makes it easier for them to click an "Unsubscribe" link (instead of the Report Spam button) if they do not want to receive your emails.

 Enable Confirmed Opt-in and/or send targeted Confirmed Opt-in campaigns to lists that don't perform well.

When Confirmed Opt-in is enabled in your account, contacts must confirm their interest in receiving your emails by responding to a confirmation email they receive after sigining up through your Join My Mailing List Form. You can also send confirmation emails manually to contacts that you add or import into your account.

To learn more about confirmed opt-in visit:

http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_fagid=1716

What are the Consequences of Violating the Permission Policy?

If your contacts do not meet *all* of the above criteria:

- Your account may be subject to analysis by our Compliance Team
- The Compliance Team may disable or terminate your account if you receive complaint rates above industry tolerances

Note: To help prevent you from violating the policy, Constant Contact conducts routine **list reviews** in response to organic list growth. During a list review we explain, and assist with, list maintenance best practices.

Why is the Permission Policy Required and Strictly Enforced?

Constant Contact's permission policy is strictly enforced in an attempt to:

- Prevent you from violating the federal CAN-SPAM Act¹ that protects consumers from receiving unwanted commercial email
- Ensure successful delivery rates for all customers
- Protect Constant Contact's reputation as a trusted email sender
- Prevent Internet Service Providers (ISPs) from blocking or rejecting all mail sent through Constant Contact

¹ To read the Federal Trade Commission's 2008 updates to the CAN-SPAM act online, please visit: http://www.ftc.gov/os/2008/05/R411008fm.pdf

2. Add New Contacts

To add new email addresses, with or without contact details, into Constant Contact, you will use an Add/Import function. The Add/Import functions, located in the Contacts > Manage Contacts section of your Constant Contact account, feature two standard* options:

- Type or copy & paste
- Import a file (.CSV, .XLS, or .TXT)

The guidelines on the next page will help you determine which method to use. Before you select a method, however, you should know how contact lists work in Constant Contact.

* Notes:

- To learn about alternative ways to add new contacts not explained in this section, refer to the *Preview Your Options and Resources* section at the beginning of this guide.
- You can also use both of the above Add/Import methods to update details for contacts that are already in your Constant Contact account. *Section 3*, however, explains additional options for updating your existing contacts' profiles.
- For help importing contacts from a Gmail My Contacts list or Gmail Group, see Appendix IV.

Before You Add Contacts

Before you begin adding new contacts:

- 1. Be aware that the contacts you are about to add to your account will *not* receive a Welcome Email. If you have never sent emails to the contacts you are about to add before, you may send them a test version of your Welcome Email.
- 2. Review the list selection criteria below to understand how contact lists work in Constant Contact.
- 3. To choose the method for adding your contacts that will work best for you, use the guidelines on the next page.

Learn How Contact Lists Work & Select Lists for Your New Contacts

When you add a group of email addresses to your account, you must add all of the contacts in the group to the same contact lists, at least initially. Before you consider how you will add your new contacts, take a moment to determine how many contact lists you want to add, and how many email addresses each group will contain.

As you plan and select contact lists for your new contacts, keep the following things in mind:

- When you add a group of email addresses to your account, either by importing a file or typing the contact information into your account manually, you must add all of the email addresses in that group into the same list(s).
- You can change contacts' list subscriptions after you add them into your account.
- You can only send emails to entire lists at once. To send an email to just one or two people, create a separate list for them.
- It is impossible to add an email address to the same list twice. Constant Contact removes **duplicate email addresses** from lists for you. If you send an email to two lists at once, any email addresses that are on both lists will receive only one copy of the email. If you are concerned about duplicate email addresses or the effect on your contact limit for billing purposes, see *Section 6*.
- Constant Contact saves your lists. You do not need to re-add contacts to lists each time you send an email.

Tip: Need a resource to show you how to manage your contact lists in Constant Contact? See Section 7.

Choose a Method for Adding New Contacts

After you select the lists for your new contacts, you will see the following options:

- Type or copy **email addresses** into Constant Contact (up to *one hundred* email addresses without contact details at a time)
- Type my **email addresses and contact details** into Constant Contact (add or update up to *ten contacts* with up to *four contact details* each at at time)
- Import contacts from Gmail or Google Contacts (for help with this option, see Appendix IV)
- Import my list from a file² (add up to 20,000 email addresses with or without contact details)
- Download import tools (see the Overview at the beginning of this guide to learn more)

Note: To learn about contact details, see Section 4.

To determine which method will be most efficient for you to use, follow the guidelines in *Table 1* below. If you want to update existing contacts' details without accidentally adding any new contacts in the process, skip ahead to *Section 3*.

Table 1. Select a Method for Adding New Contacts

Quantity of Information to Add	Recommended Method	Where to Find Instructions
 New email addresses only (Up to 100 at a time) Up to ten new* email addresses at a time with four or fewer details each 	Type or copy & paste	Section 2a on this page
 Eleven or more new* email addresses with four or fewer details each Any number of email addresses having five or more details each (Maximum contact limit per file is 20,000) 	Format the contact list* in a file and import it into Constant Contact	 Section 2b to format the file Section 2c to import the formatted file

*Note: You can also use both of the Add/Import methods (type or import a formatted file) described in this section to update existing contacts' details. See Table 2 in Section 3 for help choosing the appropriate update option for you.

Email Marketing Free Trial Contact Limit Reminder: An Email Marketing Free Trial ends as soon as your account contains greater than 100 contacts (in addition to your own email address). If your trial ends for this reason, or if you have questions about allowing Constant Contact to upload only as many contacts as will fit within this limit, see *Section* 6.

2a. Type or Copy & Paste New Contacts

Manually typing or copying & pasting new contacts into your account is the fastest method if you are adding:

- Up to 100 new email addresses without contact details
- 2 **Note:** If your permission-based contacts list is in your email client's address book, get help exporting it into a file at: http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=2652

• Up to ten email addresses for new or existing contacts with four or fewer details each

Tips:

If you frequently add just one contact at a time... Try the free, downloadable Contact Capture Tool that allows you to quickly add or update a contact without opening a web browser. Learn more at: <u>http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=3296</u>

If you want to add more than 100 email addresses at a time... it will be most efficient to import the list in a file using the instructions in Section 2b - 2c.

Email Addresses Only

If you are adding new email addresses without details, you can type or copy & paste up to 100 at a time. If you are in the Email Marketing Free Trial, you trial will end

To type or copy new email addresses without details into Constant Contact list(s):

- 1. Click the **Contacts** tab.
- 2. In the My Contacts section of the resulting page, click the "Add/Import" link.
- Select a list and click Next. If creating a new list, give it a unique name and click Save.
 Note: To learn about how contact lists work in Constant Contact, refer back to the beginning of Section 2.
- 4. Select "Type or copy my email addresses into Constant Contact" and click Next.
- Type or paste one email address per line.
 Note: Do not type any extra spaces before or after an email address. Addresses containing invalid characters (such as < , > , : , [, and]), or more than 80 characters, cannot be added.
 Tip: Submit data frequently to avoid losing your work.
- 6. Click **Submit Data**.

Note: For help with error messages or Free Trial contact limits, refer to Section 6.

Email Addresses with Contact Details

You can use the type or copy & paste method described below to add up to 100 email addresses having no more than four details each. For efficiency, we only recommend using this method if you have *no more than ten** *email addresses* for new and/or existing contacts with *four or fewer details* each. You will be able to choose which contact details or custom fields you want to add. You can learn more about contact details in *Section 4.*

If you are adding more than ten new email addresses with details, or each address has five or more details, you can save time by importing the list in a file instead (see *Section 2b and 2c*).

To manually add new email addresses with contact details and/or new details for existing contacts:

- 1. Click the **Contacts** tab.
- 2. In the My Contacts section of the resulting page, click the "Add/Import" link.

- Select or create a list and click Next.
 Tip: To find out how contact lists work in Constant Contact, refer back to the beginning of Section 2.
- 4. Select "Type my email addresses and contact details into Constant Contact" and click Next.
- Select the appropriate detail headings from the drop-down box.
 Note: If there isn't a standard detail label for your data, you may assign it to a custom field.
- Type a valid email address into the first text box.
 Note: Do not type any extra spaces before or after the address. Addresses containing invalid characters (such as < , > , : , [, and]), or more than 80 characters, cannot be added.
- 7. Type the appropriate contact details into the corresponding text boxes in that row. For example, type "John" under "First Name." Continue to add up to four contact details per email address.

Note: Most contact details have a 50 character limit (only the first 50 characters are saved).
See Section 4 to see a complete list of contact detail character limits.
Tip: Click the Submit Data button frequently to avoid losing your work.

- 8. If you have more email addresses to add, click **Submit & Add More**.
- When you are done, click Submit Data.
 Note: For help with error messages or Free Trial contact limits, refer to Section 6.

2b. Format a File of New or Updated Contacts

Importing a file containing your contact list into Constant Contact is the most efficient way to add:

- Large contact lists with greater than 100 email addresses (although you can import files with smaller lists, if you prefer)
- Any list size with email addresses having five or more details each

Before you import any list of contacts, regardless of whether it contains information for new contacts and/or updates to existing contacts, you must put the information into a spreadsheet (.CSV or .XLS) or a plain text (.TXT) file and format it according to the guidelines in this section. Many email clients allow you to export contacts into a spreadsheet file. To format your contact information:

- In a spreadsheet, use the instructions below.
- If your contact information is in a plain text file (such as in Notepad or TextEdit), go to page 13.

Format a Spreadsheet (.CSV or .XLS) File of New or Updated Contacts

Before you import contact information in a spreadsheet file, you must arrange the information in a format that Constant Contact can recognize.

Important note: The following formatting instructions apply to all contact files you import into Constant Contact regardless of whether they contain new contacts and/or updated details for existing contacts.

To begin, open a blank spreadsheet (or the spreadsheet containing your contact list), and save the file with a .CSV or .XLS extension. *We strongly recommend saving as .CSV* instead of .XLS to reduce the chance of errors

occurring when you import it. Do not save as .XLSX.

Note: If you are using Microsoft Excel, the 97-200**3** version is recommended. **If you are** using Excel 200**7**, re-save the file in the Excel 2003 format to avoid creating a .XLSX file. For help converting a .XLSX file to a .XLS file, go to: <u>http://office.microsoft.com/en-us/excel/HA100141071033.aspx#SaveToPreviousVersion</u>

Tip: Save the file with a name that describes the group of contacts you want to import and/or today's date.

 If you need help exporting contacts from an email client (e.g., Hotmail AOL, Yahoo, etc.) into a file, you can find instructions through this FAQ: http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_fagid=2652

To watch a brief online recorded *demonstration of how to format a spreadsheet*, see the *Importing a List* tutorial at: <u>http://www.constantcontact.com/display_media.jsp?id=14t</u>

If you are adding new email addresses without contact details, enter one valid email address in each row. Do not type any extra spaces before or after an address. Addresses containing invalid characters (such as < , > , : , [, and]), or more than 80 characters, cannot be added. When you are done adding the addresses, skip to Section 2c (Import a Formatted File of New or Updated Contacts).

If you are adding email addresses with contact details, use the following steps to arrange the information for each contact in a separate row:

- 1. In the first row, we recommend that you type a unique label for each type of information you are adding with each email address. Although optional, labels allow you to:
 - Indicate what type of information each column will contain
 - Help Constant Contact to store each detail in the appropriate field in Constant Contact
 - Bypass the 'Select how to label your data' page (explained in Section 5)

Example: You can upload any variety of contact details. This example shows how the first row in your file would appear if you were only adding contacts' first names, last names, and email type preferences (HTML or Text) with their email addresses.

	A	В	С	D	E
1	email address	first name	last name	email type	
2					

Note: For a list of contact character limits and proper spellings for each label, refer to *Section 4*. **Tip:** For best results, always label cell A1 email address (or Email Address). Then enter the email addresses in the first column in the rows beneath the email address label.

- 2. Enter the information for each contact in a separate row. Type the **valid** email address in the 'email address' column. Enter any other contact details in the column with the appropriate label you added in step 1. The order of your contacts does not matter.
 - **Spreadsheet format:** Do not use multiple spreadsheets/worksheets. Enter all of the contact information on only one page/tab/worksheet.
 - Email addresses: Enter only one email address per row (ideally, in the first column). Do not type any extra spaces before or after the address. Addresses containing invalid characters (such as < , > , : , [, and]), or more than 80 characters, cannot be added.
 Note: If your email addresses look like the ones in the image below (blue and underlined), they

are hyperlinked. You must deactivate the hyperlinks. To find out how, visit:

	A	В	С	D
		first name	last name	email type
2	address@aol.com	Mary	Cabot	HTML
	screename@yahoo.com		Locovich	Text
4	fakeemail@domain.com	Cary	O'Malley	HTML

http://office.microsoft.com/en-us/excel/HP051996971033.aspx?pid=CH062528431033

- Missing contact details: If you are missing a contact detail for a particular email address, leave the corresponding cell blank. If you use this file to update existing contacts' details, leaving a cell blank will erase any corresponding value you may have previously stored in Constant Contact for that contact.
- Spelling: Spell state, province, and country names correctly. See Appendix I II.
- Zip codes: When importing zip codes beginning with zeros in Excel, format those cells with the 'zip code' number formatting. For more detailed help, visit: <u>http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.</u> <u>php?p_faqid=2179</u>
- 3. Save your work.
- 4. Import the formatted file. There are two ways to import a formatted file. If your file has:
 - At least one new contact (an email address that is not yet in your account) use the "Add/ Import" function to import the file. For instructions, go to Section 2c (Import a Formatted File of New or Updated Contacts).
 - Only new details for existing contacts and you want to make sure you do not accidentally add a new contacts to your account — use the "Update" function to import the file. For instructions, go to Section 3b (Import a File to Update to Existing Contacts' Details).
 Note: The difference between importing a file with the "Add/Import" and "Update" function is explained in Appendix III.

Format a Plain Text File (.TXT) of New or Updated Contacts

Before you format contact information in a Notepad (Windows) or TextEdit (Mac) plain text document, save the file with a .TXT file extension.

- Use a name that describes the group of contacts you want to import and/or today's date.
- Verify that the Encoding drop-down menu on the Save As screen is set to ANSI (Unicode will not work).

<	0		>
File name:	new_contacts_joined_Week3_August09.bt	~	Save
Save as type:	Text Documents (*.txt)	*	Cancel
Encoding:	ANSI	~	
	ANSI Unicode	_	

Formatting the file:

How you format the file depends on whether you are adding contact details with each email address.

If you are adding email addresses without contact details, separate each valid email address with a comma (e.g. name1@company.com,name2@company.com,name3...) or enter one email address per line. When you are done inputting the addresses, import the file with the instructions in Section 2c.

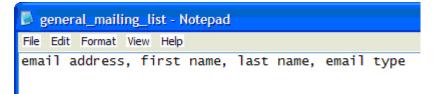
If you are adding email addresses with contact details, use the following steps to arrange the information for each contact on a separate line:

1. On the first line, we recommend that you type a unique label for each type of detail you are adding with the email addresses. Separate each detail's label with a comma (i.e., email address, first name, last name). To see a list of standard contact detail labels that Constant Contact can recognize, and to learn about custom fields, refer to Section 4.

Although optional, labels allow you to:

- Indicate what type of information each column will contain
- Help Constant Contact to store each detail in the appropriate field in Constant Contact
- Bypass the 'Select how to label your data' page (explained in Section 5)

Example: The following example shows how the first row in your file would appear if you were only uploading first names, last names, and email types with each email address.



If you customized the names of the contact details on your Join My Mailing List form, type the labels exactly as they appear on your form **or** use the original standard names.

- On the second line, add the first contact's email address, followed by the contact's details. Separate each detail with a comma. If you used the first line in the file to label the details you will add, as described in the previous step, enter the details in the same order in which you've listed the labels.
 - Do not type any extra spaces before or after an email address
 - Enter only one email address per contact. It must be valid (for details, see Section 6f)
 - Remove invalid characters (such as < , > , : , [, and])
- Continue to add one contact per line with each detail ordered in the same sequence as the line above.
 - Order of email addresses: The order in which you list the contacts does not matter, but the order in which you list the details must be the same on each line.
 - Spelling: Spell state, province, and country names correctly. See Appendix I II.
 - **Missing contact details:** If you are missing a contact's detail, simply indicate that by typing two consecutive commas. If you use this file to update existing contacts' details, leaving a cell blank will erase the corresponding value you had previously stored in Constant Contact for that contact.

Example: In the sample .TXT file below, an email type is missing from the second row because Mary Smith did not indicate whether she preferred to receive Text or HTML emails. By default, however, she will receive an HTML email.

eneral_mailing_list - Notepad Edit Format View Help il address, first name, last name, email type eD@domain.com, Mary, Smith, ________Doe@domain.edu, Joe, Doe, Text ite_13@domain.biz, Jane, Sprite, HTML gers@domain.net, Mike, Rogers, HTML eM12@domain.com, Jose, Martinez, Text

- 4. Import the formatted file. There are two ways to import a formatted file. If your file contains:
 - At least one new contact (an email address that is not yet in your account)— Use the "Add/ Import" function to import the file. For instructions, see Section 2c (below).
 - Only new details for existing contacts *and* you want to make sure you do not accidentally add a new contacts to your account— Use the "Update" function to import the file. For instructions, go to Section 3b (Import a File to Update to Existing Contacts' Details).

Note: The difference between importing a file with the "Add/Import" and "Update" function is explained in *Appendix III*.

2c. Import a Formatted File of New or Updated Contacts

If you formatted your contact information in a file with the instructions in the previous section, you are ready to import it into Constant Contact. If you re-add existing contacts with new or updated details in the file, their new details will be updated in your account. If you only want to update existing contacts' details, without adding new email addresses, use the import instructions in *Section 3b*.

Email Marketing Free Trial Reminder: If you are in the Email Marketing Free Trial, it will end as soon as your account contains greater than 100 contacts (in addition to your own email address). If your trial ends for this reason, or if you have questions about allowing Constant Contact to select and upload as many contacts as will fit within the limit, see Section 6.

To import your formatted file that contains at least some new contacts into Constant Contact:

- 1. Click the **Contacts** tab and select "Add/Import" in the My Contacts section.
- 2. Select or create a list and then click Next.
- 3. Select "Import my list from a file on my computer" and click Next.
- 4. Click Browse to locate the file on your computer.
- 5. Click Submit Data.
- 6. Read and check off the permission requirements.
- 7. Click Submit.
- If the 'Select how to label your data' page appears, select the contact detail or custom field label that best describes the example provided directly below it.

Example:

2.	Select Label	~
Mar	Select Label Do not import	^
Mai	Do not import	
Pau	Email Address	
	Email Type	
Jos	First Name	
	Middle Name	_

Note: If you do not want to import a particular column, select **do not import** from the menu. For additional help selecting data labels, see *Section 5* (*Selecting Contact Data Labels*).

- To check the status of your import, go to Contacts > Activity.
 Note: Depending on the list size, it may take a few minutes to up to two hours for the import process to complete. Click the orange Refresh button to see the activity's current status.
- 9. To view the activity's details, click the activity's link in the Activity column.

Contacts with "errors" have *not* been imported. Contacts with "warning" messages have been added to your account, but we recommend correcting any inaccurate data, such as spelling errors, that caused the warning.

To learn how to resolve warning and error messages, see Section 6e - 6f. To learn about the Email Marketing Free Trial contact limit, see Section 6k - 6l.

3. Update Existing Contacts' Details

This section explains how to update details and email addresses for contacts that are already in your account. If you are not familiar with how to collect and use contact details or custom fields, see *Section 4*.

Here is an overview of your options for updating contact information in Constant Contact. The table on the next page will help you select the method that will be most efficient for you.

To update an individual contact's *details* you can:

- Edit a profile directly in your account View and modify an individual contact's profile and list subscriptions (see Section 3a).
- Use Contact Capture Tool If you frequently need to add or update no more than four contact details for one existing contact at a time, try Contact Capture Tool. Contact Capture Tool is not explained in this section, but you can find instructions for installation and use at: <u>http://constantcontact.custhelp.com/cgi-bin/</u> <u>constantcontact.cfg/php/enduser/std_adp.php?p_faqid=3293</u>

To update contact *details* for a group of contacts you can:

- **Type or copy & paste** Add or update *up to four* contact details for *up to one hundred* existing contacts with the "Add/Import" function (Note: If you are updating *more than ten contacts*, it is generally more efficient to import the updates in a file).
- Import a file Format the the new or updated contact details for up to 20,000 existing contacts in a file with the steps in *Section 2b*. After you carefully format the file, import it with the "Update" function instructions in *Section 3b* if you want to avoid accidentally adding new contacts.

*Note: If your permission based contact list is currently in another application, you may be able to use a **contact** import tool or API to add and update your existing contacts' details. For more information, refer to the *Preview Your Options and Resources* section at the beginning of this guide.

To update existing contacts' *email addresses*, you can:

- **Remind contacts to update their profiles** Remind contacts to click the "Update Profile" link at the bottom of your emails to give them the chance to update their own email addresses (and other details).
- Manually edit email addresses Edit an individual contact's email address when you view their profile in Constant Contact (This method only works with email addresses that have *not* been confirmed through the **Permission Reminder** or a **Confirmed Opt-in** email).
- Add the new email addresses and remove the old ones— Add the new email addresses (and any details associated with each old email address) as new contacts and remove the old email addresses.

Choose a Method for Updating Contacts' Information

To determine which method you should use and to locate instructions, follow the guidelines in Table 2 (on the next page.

Type of Update / Purpose	Recommended Update Method	Where to Find Instructions
Update just a few contacts	 Update manually: Edit each contact's profile individually in Constant Contact) Type up to four new details for up to ten contacts at a time through "Add/ Import" 	 Section 3a to view and edit individual profiles Section 2a to type or copy & paste updates for a few contacts at once
Update several details for multiple contacts *You cannot update email addresses with this method	Import a file (Format the existing contacts' details into a spreadsheet or plain text file and import it)	<i>Section 2b</i> to format the file <i>Section 3b</i> * to import the file
Confirm that the information you have on file for every contact is complete and current	Ask contacts to update their profile (Encourage your contacts to click the "Update Profile" link in your email to update their own information)	Section 3c

Table 2. Select a Method for Updating Existing Contacts' Details

* **Note:** Section 3b explains how to import the formatted file of updates with the Update function. You can also use the Add/Import function to import files containing updated details for existing contacts. For more information about the difference between the "Add/Import" and "Update" file import options, see *Appendix III*.

3a. Type or Copy & Paste Updates

You can manually update contact profiles individually or in small groups from within your Constant Contact account.

- **Small groups**: To add up to four new details for a few existing contacts at once from one screen in your account, see the Add/Import "Type or Copy & Paste with contact details" option in *Section 2a*.
- A single contact: To view and edit one contact's profile (email address, details, notes, and lists) directly³:
 - 1. Search for the email address or contact name. If you are changing the email address, search for the old address first.
 - 2. When the search results display, click the contact's email address to display the contact's profile on the Details page.

3 contacts, displaying all contacts.		
Email Address		
example1@domain.com		
example2@domain.com		
example@domain.com		

3. Use the tabs on the left to navigate to the correct details section.

3 You can also update details for a single contact with Contact Capture Tool, a free tool you can download for your computer desktop. To try Contact Capture Tool, visit: http://constantcontact.custhelp.com/cgi-bin/constantcontact.ctg/php/enduser/std adp.php?p faqid=3296

Email Addre	ss: johndoee	xample@domain.com 🖂		
Status:	Active			Last Update:
Added By:	Site owner	Select tabs to change	views	Date Added:
Notes	_	Email Address:	johndoeexa	mple@domain.com
Contact Inform	ation	First Name:	John	
Company Infor	mation	Middle Name:	Μ.	
Custom Fields		Last Name:	Doe	
Email Format		Home Phone:	555-555-55	66
Lists		Address:	Street Add	ess
Email History		Edit contact information		
Bounce History		here	00110 10 120	

4. Make your changes and click **Save**.

Note: If you cannot edit a contact's email address, the contact confirmed the address through a confirmed opt-in email or the "Confirm" link in a Permission Reminder. Refer to *Section 6* for help.

3b. Import a Formatted File to Update Existing Contacts' Details

Before using the instructions below to import a file of updates, format the information in the file with the steps in *Section 2b.* You can use this method to update the details for up to 20,000 of your existing contacts (if you just need to update a contact's email address, use the steps in *Section 3a* or *3c*).

Note

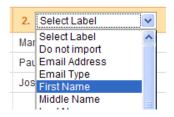
If your file contains *any new* email addresses that are *not* already in your Constant Contact account, import the file with the Add/Import function (see *Section 2c*). The Update function described in this section is specifically designed to prevent you from adding new contacts that are not permission-based by mistake (See *Appendix III)*.

To automatically update the details for email addresses that are in an existing list in Constant Contact:

- 1. After formatting your contact detail updates according to the guidelines in *Section 2b*, click the **Contacts** tab.
- 2. In the My Contacts section of the resulting page, click "Update".
- 3. Click **Browse** to locate your file of formatted and updated contact details on your computer and then click **Update**.

Important: Always format contact information in your file carefully with the instructions in *Section 2b.* Every row or line must contain an email address (ideally, located in the first column in spreadsheets and to the left of the details in plain text files).

4. If the 'Select how to label your data' page appears, confirm or select the appropriate data labels for each data field.



If you do not want to import a particular column, select **do not import** from the menu. If you need additional help selecting data labels, see *Select Contact Data Labels* (*Section 5*).

- 5. Click **Start Import** to begin the import.
- 6. To check the status of your import, go to Contacts > Activity. If the status is Pending, click the orange Refresh button at the bottom of the activities list to re-check the import's status every so often until it is complete. Depending on the quantity of data in your file, the import could take anywhere from a few minutes to up to 2 hours to complete.
- 7. When the import is complete, click the link in the Activity column to find out if all of the contacts were imported successfully.

Note: Contacts listed on the Activity screen with "errors" have *not* been imported. Contacts with "warning" messages have been imported, but you should correct the invalid data that caused the warning. To learn more about what causes warning messages and errors, refer to *Section 6*.

3c. Ask Contacts to Update their Information

Your contacts have two options for updating their email addresses, personal information, and list subscriptions:

Click the "Update Profile" link in the footer of your email.
 To verify that the "Update Profile" link is included in your emails, click My Settings > Manage My

Settings. If the "Update Profile Email Link" option is OFF, click "Edit footer info" to turn it ON.

Re-add their email address into a Join My Mailing List box.

Enter the contact's email address into a Join My Mailing List signup form link in your email or on your website (as though they were signing up for the first time). Contacts will then receive an email with a link to your email registration page where they can update their existing profile.

To customize the contact details you collect on your Join My Mailing List form, click the **Contacts** tab and the "Join My Mailing List" link. On the resulting page, select (#2) "Edit Join My Mailing List Form".

To watch the *Customizing Your Join My Mailing List Form* tutorial, go to: <u>http://www.constantcontact.com/display_media.jsp?id=5t</u>

4. Use Contact Details and Custom Fields

Contact details are the pieces of information about each contact, such as name and zip code, you can optionally store with each email address in your Constant Contact account. To see Constant Contact's list of standard contact details, refer to Table 3 on the next page. This section provides a brief overview of how to collect, update, use, and label contact details, as well as custom fields.

Collecting Contact Details

If you have not collected contact details yet, that's okay; here are a few ways you can collect information from your existing contacts at any time:

• Customized Join My Mailing List Form

Customize which details you collect on your online **Join My Mailing List Form** and encourage your existing contacts to click the "Update Profile" link in your email (as described in more detail in Section 3). Watch this recorded tutorial: <u>http://www.constantcontact.com/display_media.jsp?id=15t</u>

• Constant Contact Online Survey Invite your contacts to take an online survey with a "Collect Personal Information" question type.

See the recommended resources for collecting permission-based contacts and contact details in Section 7.

Updating Contact Details

To add new details to your existing contacts' profiles, use any of the update methods listed in Section 3.

Using Contact Details

Contact details, although not required, are primarily useful for personalizing emails. A few of them They are searchable within Constant Contact, helping you to find a specific contact's profile in more quickly. You can also use contact details to look for demographic trends and, in turn, to create targeted lists from your searches.

- Personalize emails When you insert a contact detail field into the body of an email, each contact will see their own information appear in their email precisely where you inserted the field. It will appear as though you wrote the email specifically for them.
 Example: Adjust the greeting in the email to say "Dear [Recipient's Name]"
 To get help adding contact details to an email, please visit: http://constantcontact.cig/php/enduser/std_adp.php?p_faqid=2069
- Search for contacts You can also search for contacts in your account. The basic search allows you
 to find contacts by Last Name, State/Province, and Zip/Postal code (in addition to email address).
 The advanced search allows you to find contacts by up to five contact details and custom fields.

To find the contact search options in your account, click **Contacts** > **Manage Contacts** and look for the search section on the right-hand side.

• Segment lists and identify contact demographic trends - When you export your contact information into a spreadsheet and sort contacts by their details, you can create targeted lists. You can also create targeted lists through the search options in your Contacts screen. To learn more about using

contact details to segment your lists:

Tip: Take a free webinar that demonstrates how to use contact details to segment lists: http://www.constantcontact.com/learning-center/webinars/live/details/How-to-Boost-the-Response-to-Your-Emails.jsp

 See the following step-by-step segmentation instructions in our knowledgebase at: <u>http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=2566</u>

Using Custom Fields

If the contact information you want to add is not included in Constant Contact's list of standard contact details (shown in Table 3 on the next page), you can add it into a **custom field** if it has fewer than 50 characters.

"This sample sentence contains about fifty characters."

You could, for example, store the names of each contact's favorite product in custom field #1, membership type in custom field #2, child's name in field #3, birthday in field #4, etc.

If the special information you need to add is between 50 and 500 characters long, you may add it to the contact's Notes field. Unlike contact details, however, you cannot insert contact notes into emails. You can view and edit a contact's notes directly within their individual profile in Constant Contact. Do not use the Type or Copy & Paste method to add contact notes (if you do, it will be truncated at 50 characters).

Labeling Contact Details and Custom Fields in Files

When you format a file containing new or updated contact details (with the instructions in *Section 2b*), you will assign labels to each contact detail. Contact detail labels help Constant Contact to store each piece of information in the appropriate field in your contacts' profiles. We recommend that you label the data in your file carefully to:

- Bypass the 'Select how to label your data' page
- Indicate the order in which you will enter the contact details in each row or line

If you misspell, or do not type the labels correctly, the import wizard will prompt you to select labels. If you are prompted to select labels for the contact details in your file during the import, see Section 5.

Table 3 on the next page provides the correct spellings for each type of data. If you customized the detail names on your Join My Mailing List form, you may use the labels as they appear on your form *or* use each renamed label's original name.

Tip: Put email addresses in the first column, at the left of the contact's details.

Contect Datail Label	Character	Quatem Field Label	Character
Contact Detail Label	Label Limit Custom Field Label		Limit
Email Address	80	Custom field 1	50
Email Type	4	Custom field 2	50
First Name	50	Custom field 3	50
Middle Name	50	Custom field 4	50
Last Name	50	Custom field 5	50
Job Title	50	Custom field 6	50
Company Name	50	Custom field 7	50
Work Phone	50	Custom field 8	50
Home Phone	50	Custom field 9	50
Address Line 1	50	Custom field 10	50
Address Line 2	50	Custom field 11	50
Address Line 3	50	Custom field 12	50
City	50	Custom field 13	50
State	50	Custom field 14	50
Country	50	Custom field 15	50
Postal Code	25		
Sub Postal Code	25		
Notes	500*		

Table 3. Contact Detail Standard Labels and Character Limits

You do not have to use all of the labels listed in this table; just use the ones that describe the information you are adding or updating.

Get help adding contact details for:

- New email addresses (or new and existing contacts together), see Section 2.
- Email addresses that are already in your Constant Contact account, see Section 3.

To learn more about custom fields and contact details, in general, see the Contact Detail and Custom Field Help Overview in Constant Contact's searchable knowledgebase:

http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=3576

5. Select Contact Data Labels

When you add contact details with email addresses, you need to make sure you are adding them to the appropriate field in each contact's profile. You would not want a contact's first name, for example, to be added to the Last Name field in their profile.

If you do not type the contact detail labels in your file exactly as they appear in the list (or on your customized Join My Mailing List Form), you will be prompted to select labels with the data label matching tool described below.

The 'Select how to label your data' page shows you one drop-down menu for each type of data you are importing. Select the label from the drop-down menu that most accurately describes the type of information that appears above and below it.

To label the data in a file you are importing from within Constant Contact:

- 1. On the 'Select how to label your data' page, the data from your file will appear directly beneath the drop-down menu.
- 2. Open the drop-down menu and select the type of data that reflects the information in the column.

Select how to label your data



Notes:

• If you do not want to import the type of information that you see listed above and below the menu, select **Do not import** from the menu.

- If you do not see a label for the type of data you want to import, select a **custom field** number that you have not used yet.
- Repeat steps 1 and 2 with each drop-down menu that appears.
 Example:

2.	Select Label	~
Mar	Select Label Do not import	^
Iviai	Do not import	
Pau	Email Address	
	- 11-F	

4. Click **Start Import** to begin the import.

- 5. To check the status of your import, go to Contacts > Activity. Because the import could take up to 2 hours to complete, depending on the quantity of data you are importing, click the orange Refresh button at the bottom of the page to re-check the activity's status every so often until it is complete.
- 6. When the import is complete, click the activity name to find out if all of the contacts were imported successfully.

Contacts listed on the Activity screen with "warning" messages have been imported, but you should correct the invalid data that caused the warning. Contacts with "errors" have not been imported. To learn more about what causes warning messages and errors, refer to *Section 6*.

6. Troubleshoot Common Issues

This section provides help with the following tasks and issues you may encounter while adding and updating contacts in Constant Contact:

- Add an opted-out contact back to a list (6a)
- Cannot edit an email address (6b)
- Duplicate email addresses (6c)
 - Number of contacts that were added was less than the number of contacts I tried to add
 - · Sending to lists that may contain some of the same contacts
- Blank screen displays when adding contacts (6d)
- Warnings or errors appear after importing a file (6e 6f)
- Erased contact details from my account when updating contacts' profiles (6g)
- Remove one or more email addresses from some or all of my lists (6h)
- View a contact's profile (details and list subscriptions) (6i)
- Free trial of Email Marketing ended while adding contacts (6)
- Figuring out which contacts Constant Contact uploaded to prevent my Email Marketing Free Trial account from exceeding the 100 contact limit (6k)
- Choose between Add/Import and Update functions to import a file of contacts (6/)

If you have a different question or issue, please refer to *Section 7* which provides a list of resources designed to teach you about a variety of contact and list management topics.

6a. Add an opted-out contact back to a list

If you cannot add a contact to your list, that contact may have unsubscribed from your list or you may have moved the email address to your **Do Not Mail list** manually.

To rejoin your list, the contact must use either of the following:

Join My Mailing List form on your website

If you do not have a signup form and wish to create one, click **Contacts** > **Join My Mailing List** and follow step 1. Also see *Section 7* (*Additional Resources*).

• A "Subscribe me" link or an "Update Profile/Email Address" footer link in one of your emails If the contact does not have a previous email from you, send a Constant Contact email to your personal address (please do not send a test email because its "Forward Email" link would not be functional). Then use the "Forward Email" link at the bottom of the email (not the Forward button in your email client) to forward it to the contact.

After contacts attempt to sign up again via either of the above methods, they will receive an email with a link to update the "You are already a member of the Constant Contact mailing list. If you would like to update your profile, please click **Submit** and instructions will be emailed to you." Your contact must click **Submit** and **Update Profile** in the email they receive next.

After opening the email and clicking **Update Profile**, they will select which mailing lists they want to join. At that time, two things could happen depending on whether **Confirmed Opt-in** is enabled:

• If confirmed opt-in is enabled (turned on), the contact will receive a confirm subscription email.

When the contact clicks the "Confirm" link in the confirmation email, he or she will receive your welcome letter.

If confirmed opt-in is disabled (turned off), the contact will just receive your welcome letter.

Don't know if confirmed-opt-in is enabled in your account? Find out by going to **My Settings** > **Manage My Settings** and looking for 'Confirmed Opt-in'. To give your Welcome Letter a personal touch, go to **Contacts** > **Join My Mailing List**. In Section 3 of the page that appears next, click "Welcome Email".

If contacts are unable to re-subscribe using any of the previous methods, you may help them to re-join by sending an email with a Join My Mailing List link to yourself and signing up for them. If confirmed opt-in is enabled, they will receive an email in which they must click **Confirm Subscription** before receiving a welcome letter. If confirmed opt-in is disabled, they will just receive your welcome letter.

To learn why you cannot add opted-out contacts back to your mailing list by yourself, watch the two minute minitutorial here: <u>http://www.constantcontact.com/display_media.jsp?id=43t</u>

6b. Contact's email address is not editable

Normally you can edit a contact's email address by updating it manually from the Contacts: Details page (as described in *Section 3a*). You cannot edit an email address if the contact has confirmed it by:

- Responding to a confirmed opt-in email
- Clicking the "Confirm" link in the Permission Reminder header

To update the email address of a contact who confirmed the old email address you can:

- Ask the contact to click the "Update Profile" link in your email's footer
 To verify that your emails are set up to include an "Update Profile" link, click My Settings >

 Manage My Settings. If the 'Update Profile Email Link' option is OFF, click "Edit footer info" to
 turn it ON.
- Remove the contact from your lists and add him or her back as a new contact If have a copy of the contact's details (if any) to reference after you remove the contact from your account, follow the steps in Section 6h to remove the contact from all of your lists. Add the new contact's email address (and any details) with the instructions in Section 2.

6c. Duplicate email addresses

You can add one email address to multiple lists, but it is not possible to add the same email address to the same list twice. If an email address appears on multiple lists, it only counts as one contact for Email Marketing contact limit billing purposes.

If you attempt to add an email address to a single list more than once, Constant Contact will remove the duplicate from that list for you automatically. Here are some common issues related to duplicate email addresses:

Number of contacts added was less than the number of contacts I tried to add If you try to add a list of contacts in which an email address appears more than once, the number of contacts you add will be less than the number of contact that may appear to be on the list. This happens because Constant Contact automatically removes the second instance of an email address on your list automatically.

If the number of contacts you added or imported is less than the number of contacts that you tried

to add, but the list you added did not contain duplicate email addresses, errors may have occurred. Click **Contacts** > **Activity** and select the link in the Activity column to view error details. To see common causes of error messages, refer to *Sections 6e - 6f*.

• Sending to lists that may contain some of the same contacts

If you send a single email to all of your lists simultaneously, any contact that is on more than one of your lists will only receive that email once. If you send out the same email to different lists at different times, the contact will receive multiple copies of the email; each copy, however, would have a different timestamp.

6d. Blank screen displays when adding contacts

If you see a blank screen when adding contacts, the specific combination of your computer's operating system and web browser might not be compatible with Constant Contact. Constant Contact is not optimized for dial-up connections and is not compatible with AOL software on MAC computers.

Below is a list of browser and operating system combinations that are compatible with Constant Contact Email Marketing. To see a current list of compatible browsers for all products, please visit: <u>http://constantcontact.custhelp.</u> <u>com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=2382</u>

OS	Browser		
Windows 2000	Internet Explorer 7+, Firefox 3.5+		
Windows 2003	Internet Explorer 7+, Firefox 3.5+		
Windows 2007	Internet Explorer 7 and 8, Firefox 3.5+		
Windows XP	Internet Explorer 7+, Firefox 3.5+		
(Service Pack 2)			
MAC 10.4	Firefox 3.5+		
Windows Vista	Internet Explorer 7, Firefox 3.5+		

Email Marketing Combatible Web Browsers

Note: Google Chrome is not currently supported.

6e. Warnings appear after importing a file

After you import a file of contacts, review the **Contacts** > **Activity** screen in your account to check for warning and error messages. If you see a "warning" message, the contact has been added or updated, but you should correct the invalid data. Common causes of warning messages include:

- o Misspelled or mis-matched state, province, and country names See Appendix I-II.
- Contact detail exceeded character limit— If you attempt to add a contact detail that exceeds the character limit it will be truncated, or cut off. Most contact details can support up to fifty characters, but refer to *Section 4* for exceptions. To correct any incorrect details that may contain errors, you can view and edit the contact's profile directly (see *Section 3a*).

Note: You cannot export the list of email addresses that generated warning messages into a file. You can, however, copy & paste them into a file to reference while you correct the mistakes.

6f. Errors appear after importing a file

Unlike warning messages, error messages indicate that the contact with the invalid information has *not* been added or updated. To find out if errors occurred during your last file import, go to the **Contacts** > **Activity** screen. Look at the Errors column to see the number of errors that occurred. To help identify what caused these errors, click the activity's link in the Activity column. This takes you to the Activity Details page which includes a more detailed error list. Here are some common causes of errors:

- Missing email address You cannot add or update contact information without specifying a valid email address. For best results, list email addresses first on every row or line when importing a file that also contains contact details. In an Excel spreadsheet, for example, put all email addresses in column A, and the contact details associated with each email address in the columns to the right of column A.
- **Invalid email address** Below are some common reasons why email addresses are considered to be "invalid", followed by examples in the table.
 - Non-printable characters in a data value In addition, the following characters will cause errors: < , > , : , [, and]
 - *Hyperlinks* If an email address in a file appears in <u>blue underlined font</u>, it is hyperlinked.
 You must remove hyperlinks from email address. To get help deactivating hyperlinks, see: <u>http://office.microsoft.com/en-us/excel/HP051996971033.aspx?pid=CH062528431033</u>
 - Mistyped Most valid email addresses take the form: name@domain.com
 - o Too long Valid email address can contain no more than 80 characters

Bad email address	Problem
joe smith@domain.com	Extra space between 'joe' and 'smith'
joesmith@domain@com	Two @ symbols
	Missing dot before the 'com'
joesmith@domain.com	The _ represents a space; do not put extra spaces
	before or after data
joesmith@domain.	Two addresses on one line in a spreadsheet file
com,joesmith1@domain.com	
joesmith@domain.	Missing comma to separate two email addresses in a
comjoesmith1@domain.com	.TXT file of email addresses without details
joesmith@domain.com	Email address is a hyperlink

• Extra spaces – Do not enter extra spaces before or after the address

- "Contact does not exist" message (when importing a file of Updates only)— If you are adding any email addresses that do not yet in your Constant Contact account, use the "Add/Import" function (Section 2c) instead of the "Update" function (Section 3b) to import your file.
- **Opted out or unsubscribed contact** If you are trying to add an opted out contact back to your list, see *Section 6a*.

6g. Erased contact details from my account when updating contacts' profiles

When you update the contact details in your account, it is possible to accidentally overwrite or delete a contact detail. If you leave a cell in a spreadsheet (two consecutive commas in a plain text document) empty, you are

instructing Constant Contact to clear out, or delete, any corresponding value that you had already saved in your account. If you lose or accidentally overwrite a contact's detail, you can retrieve the correct data if you originally uploaded the information to your account in a file (if you have not deleted the file).

Constant Contact cannot recover data that was lost or overwritten when updating contact details. To recover lost contact information, urge your contacts to click the "Update Profile" link in your email footer.

6h. Remove one or more email addresses from some or all of my lists

To remove a contact (or file containing a list of contacts) from some or all of your lists:

1. Go to Contacts > Manage Contacts.

- 2. In the My Contacts section, click "Remove" (not "Removed").
- 3. Select the names of the lists from which you want to remove the contact. If you want to remove the contact from all of your lists, check the box to the left of "List Name" to select all lists.
- 4. Scroll down to Step 2 and either enter the email addresses in the text box provided or click **Browse** to provide a file containing the list of email addresses you want to remove.

5. Click Remove.

If you removed the contact because their email address was outdated, and you want to add the contact's new address to your account, go to *Section 2a*. If the contact has asked to be removed from your list, add them to your Do Not Mail list to prevent yourself from accidentally re-adding them to your list later.

6i. View and edit a specific contact's details and list subscriptions

To view and edit a contact's list subscriptions, navigate to their Details page and select the **Lists** tab on the left side of the page. For help finding a contact's Details page, see the instructions in *Section 3a*.

6j. Free trial of Email Marketing ended while adding contacts

If your Email Marketing free trial ended because your account exceeded the 100 contact limit, you can:

- Upgrade to a paid Email Marketing account to regain full functionality
- Remove contacts (with the steps in Section 6h) so that your account contains fewer than 100 contacts, then
 ask Constant Contact Support to reset your trial. To view your Constant Contact Support options, visit:
 http://www.constantcontact.com/support/index.jsp

6k. Figuring out which contacts were uploaded to prevent me from exceeding Free Trial limit (6k)

The Email Marketing free trial will end either after 60 days or when your account contains greater than 100 contacts (whichever comes first). If you try to add more than 100 contacts to a free trial Email Marketing account using any of the standard methods (copy and paste, add individual contacts, or import file of contacts), Constant Contact will offer to select and upload as many contacts from the group you are uploading as will fit into your account without end-ing your trial. If you choose this option, Constant Contact *selects the contacts at the top of the list* you are trying to upload.

You may still have room to add more contacts in your account after you use this option if your original list contained addresses that were already in your account or duplicate email addresses. Constant Contact automatically removes duplicate email addresses during the import process. After it removes the duplicate email address from the contact list while importing it, it will not return to the original list you provided and select another email address to replace it. When the contact upload process is complete, you can view the total number of active contacts in your account in the My Contacts section of the **Contacts** > **Manage Contacts** screen in your account.

6l. Choose between Add/Import and Update functions to import a file of contacts

If your formatted file of contacts contains:

- Only new contacts, import the file with the Add/Import function explained in Section 2.
- New contacts and updated details for existing contacts, always import the file with the Add/Import function explained in Section 2.
- Only updated details for existing contacts, and you want to make sure you do not accidentally add new contacts, import the file with the Update function explained in *Section 3*.

For a more detailed comparison of the Add/Import and Update functions, see Appendix III.

7. Additional Resources: Collect and Manage Permission-Based Contact Lists

The following resources will help you learn how to build and manage permission-based contact lists with Constant Contact. The resources are organized categorically in this order:

- Follow the Required Permission-Based Contact Policy
- Collect More Contacts
- Manage Contact Lists
- Remove Contacts and Manage Opt-Outs
- Import Contacts from Email Clients and Other Software Applications

Follow the Required Permission-Based Contact Policy

Building Better Lists (Live webinar)

Find out how to grow your list and get permission to add your contacts to your mailing list in the Building Better Lists live webinar. You can watch, listen, and ask questions. To register, visit: http://www.constantcontact.com/learning-center/webinars/live/details/Building-Better-Lists.jsp

- Constant Contact's Anti-Spam Policy
 What constitutes consent? What constitutes a pre-existing business relationship? See Constant Contact's antispam policy, at: http://www.constantcontact.com/uidocs/CCSpamPolicy.jsp
- Tips for Getting Permission (Printable whitepaper)
 See the top ten tips for getting and keeping permission to send email in this short printable PDF.
 http://img.constantcontact.com/docs/pdf/10tips_getting_keeping_permission.pdf
- Confirmed Opt-In Guide (Printable guide)
 This guide explains how to confirm new contacts and why doing so has become an industry best practice.
 <u>http://img.constantcontact.com/docs/pdf/confirmed_opt_in_v02.pdf</u>

Collect More Contacts

- Using Constant Contact to Build My List (FAQ)
 See instructions for using a Join My Mailing List box, surveys, social media, a printable signup form, and more
 to grow your list.
 http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=1735
- Sign Up for my List! (Recorded webinar)
 Learn how to create an engaging online signup form, customize your welcome letter, protect your signup form
 from hackers, and more. Watch the complete class or just fast-forward to the parts you're interested in!
 http://www.constantcontact.com/display_media.jsp?id=20t
- Creating a Join My Mailing List Box (Recorded tutorial)
 Watch this tutorial to see how to select, create, and customize your Join My Mailing List Box.
 <u>http://www.constantcontact.com/display_media.jsp?id=15t</u>
- Printing a Mailing List Signup Form (Printable forms)
 Print a signup form to allow visitors to your store, event, or office to sign up for your list.
 <u>http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=1154</u>

Manage Contact Lists

Manage Contact Lists (FAQ)

This resource is your table of contents to list management help topics. Get instructions for viewing, creating, emptying, renaming, deleting, merging, and organizing your contact lists! http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=2550

Manage Contacts (Recorded tutorial)
 To see an overview of your contact management options, check out this five minute tutorial:
 http://www.constantcontact.com/display_media.jsp?id=6t

Remove Contacts and Manage Opt-Outs

- Compliance with Opt Outs (Recorded mini-tutorial)
 Constant Contact helps you comply with federal law regarding sending email to unsubscribed contacts. Watch
 this two minute tutorial to learn more: <u>http://www.constantcontact.com/display_media.jsp?id=43t</u>
- Removing Contacts Versus Adding them to the Do Not Mail List (FAQ)
 Learn the difference between contacts on your Removed list and your Do Not Mail list and see steps to add
 contacts to either list.
 http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_fagid=1717

Import Contacts from Email Clients and Other Software Applications

- Import Tools Help Overview (FAQ)
 Find out what free contact import tools are available to help you transfer contacts directly into your account and
 find out how to use them.
 http://constantcontact.custhelp.com/cgi-bin/constantcontact.cfg/php/enduser/std_adp.php?p_faqid=3798
- Exporting Contacts in my Email Client into a File (FAQ)
 If you cannot use an import tool, and need help exporting a permission-based contacts list in your email client's
 address book into a file, these instructions may come in handy:
 http://constantcontacts list in your email client's
 address book into a file, these instructions may come in handy:
 http://constantcontacts list in your email client's
 address book into a file, these instructions may come in handy:
 http://constantcontact.custhelp.com/cgi-bin/constantcontact.cg/php/enduser/std

• Importing a List (Tutorial)

After you export your permission-based contacts from your email client into a spreadsheet, you can format the information and import it according to the guidelines in this guide. In addition, you can watch this online recorded demonstration that shows you how to format contact information in a spreadsheet, import the file, and check for errors. To watch the tutorial, go to: http://www.constantcontact.com/display_media.jsp?id=14t

Application Programming Interfaces

You can integrate Constant Contact directly into your own software program if you have software development skills (or have access to a web developer). To learn more about Constant Contact's Application Programming Interfaces (APIs), visit the Constant Contact AppConnect website at: http://developer.constantcontact.com

Appendix

I. Valid Country Names

To avoid seeing a warning message when importing a list with country names, be careful to use the correct spellings shown in the table below.

Table 4. Country Names

United States	Cameroon	French Polynesia		
Canada	Canada	French Southern Territories		
Afghanistan	Cape Verde	Gabon		
Aland Islands	Cayman Islands	Gambia		
Albania	Central African Republic	Georgia		
Algeria	Chad	Germany		
American Samoa	Chile	Ghana		
Andorra	China	Gibraltar		
Angola	Christmas Island	Greece		
Anguilla	Cocos (Keeling) Islands	Greenland		
Antarctica	Colombia	Grenada		
Antigua and Barbuda	Comoros	Guadeloupe		
Argentina	Congo	Guam		
Armenia	Congo, Democratic Republic of	Guatemala		
Aruba	Cook Islands	Guernsey		
Australia	Costa Rica	Guinea		
Austria	Cote D'Ivoire	Guinea-Bissau		
Azerbaijan	Croatia	Guyana		
Bahamas	Cyprus	Haiti		
Bahrain	Czech Republic	Heard and McDonald		
Bangladesh	Denmark	lslands Honduras		
Barbados	Diibouti	Hong Kong		
Belarus	Dominica	Hungary		
Belgium	Dominican Republic	Iceland		
Belize	East Timor	India		
Benin	Ecuador	Indonesia		
Bermuda	Egypt	Iraq		
Bhutan	El Salvador	Ireland		
Bolivia	England	Isle of Man		
Bosnia and Herzegovina	Equatorial Guinea	Israel		
Botswana	Eritrea	Italy		
Bouvet Island	Estonia	Jamaica		
Brazil	Ethiopia	Japan		
British Indian Ocean Territory	Faroe Islands	Jersey		
Brunei Darussalam	Faukland Islands	Jordan		
Bulgaria	Fiji	Kazakhstan		
Burkina Faso	Finland	Kenya		
Burundi	France Kiribati			
	French Guyana	Kuwait		

(Continued on the next page)

Valid country names continued

Kyrgyzstan	istan Palau		
Laos	Palestinian Territory, Occupied	Svalbard and Jan Mayen	
Latvia	Panama	Swaziland	
Lebanon	Papua New Guinea	Sweden	
Lesotho	Paraguay	Switzerland	
Liberia	Peru	Taiwan	
Libya	Philippines	Tajikistan	
Liechtenstein	Pitcairn	Tanzania	
Lithuania	Poland	Thailand	
Luxembourg	Portugal	Тодо	
Macao	Puerto Rico	Tokelau	
Macedonia	Qatar	Tonga	
Madagascar	Reunion	Trinidad and Tobago	
Malawi	Romania	Tunisia	
Malaysia	Russian Federation	Turkey	
Maldives	Rwanda	Turkmenistan	
Mali	Saint Helena	Turks and Caicos Islands	
Malta	Saint Fielena Saint Kitts and Nevis	Tuvalu	
Marshall Islands	Saint Kitts and Nevis		
		Uganda	
Martinique	Saint Pierre and Miquelon	Ukraine	
Mauritania	Saint Vincent & the Grenadines	United Arab Emirates	
Mauritius	Samoa	United Kingdom	
Mayotte	San Marino	United States	
Mexico	Sao Tome and Principe	United States Minor Outlving Is.	
Micronesia	Saudi Arabia	Uruguay	
Moldova	Scotland	Uzbekistan	
Monaco	Senegal	Vanuatu	
Mongolia	Saint Helena	Vatican City State	
Montenegro	Saint Kitts and Nevis	Venezuela	
Montserrat	Saint Lucia	Vietnam	
Morocco	Saint Pierre and Miquelon	Virgin Islands, British	
Mozambique	Saint Pierre and Miqueion Saint Vincent & the Grenadines	Virgin Islands, U.S.	
	Samoa	Wales	
Myanmar		Wallis and Futuna	
Namibia	San Marino		
Nauru	Sao Tome and Principe	Western Sahara	
Nepal	Saudi Arabia	Yemen	
Netherlands	Scotland	Zambia	
Netherlands Antilles	Senegal	Zimbabwe	
Neutral Zone	Serbia		
New Caledonia	Seychelles		
New Zealand	Sierra Leone		
Nicaragua	Singapore		
Niger	Slovakia		
Nigeria	Slovenia		
Niue	Solomon Islands		

II. Valid States / Provinces and Abbreviations

To avoid seeing a warning message when importing a list with states and provinces, use the proper spellings or abbreviations listed in the table below.

AL	Alabama	NB	New Brunswick	
AK	Alaska	NE	Nebraska	
AB	Alberta	NH	New Hampshire	
AZ	Arizona	NJ	New Jersey	
AR	Arkansas	NM	New Mexico	
AA	Armed Forces Americas	NY	New York	
AE	Armed Forces Europe	NL	Newfoundland and Labrador	
AP	Armed Forces Pacific	NC	North Carolina	
BC	British Columbia	ND	North Dakota	
CA	California	NT	Northwest Territories	
CO	Colorado	NS	Nova Scotia	
CT	Connecticut	NU	Nunavut	
DE	Delaware	OH	Ohio	
DC	District of Columbia	OK	Oklahoma	
FL	Florida	ON	Ontario	
GA	Georgia	OR	Oregon	
HI	Hawaii	PA	Pennsylvania	
ID	Idaho	PE	Prince Edward Island	
IL	Illinois	QC	Quebec	
IN	Indiana	RI	Rhode Island	
IA	lowa	SK	Saskatchewan	
KS	Kansas	SC	South Carolina	
KY	Kentucky	SD	South Dakota	
LA	Louisiana	ΤN	Tennessee	
ME	Maine	TX	Texas	
MB	Manitoba	UT	Utah	
MD	Maryland	VT	Vermont	
MA	Massachusetts	VA	Virginia	
MI	Michigan	WA	Washington	
MN	Minnesota	WV	West Virginia	
MS	Mississippi	WI	Wisconsin	
MO	Missouri	WY	Wyoming	
MT	Montana	ΥT	Yukon Territory	
NV	Nevada			

Table 5. State / Province Abbreviations and Names

III. Add/Import and Update Function Differences

When you click the **Contacts** tab after logging into Constant Contact, you will see an "Add/Import" link and an "Update" link in the My Contacts section.

Home	Email Marketing	Online Survey	Event Marketing	a Contacts	a In			
Manage Co	Manage Contacts Reports Export Manage Bounces Activity Join My Mailir							
Contacts	Contacts : Manage Contacts 😰 3							
My Co	My Contacts							
Add / Im	Add / Import Export (Update) Remove 🕕 Move to Do Not Mail 🛈 Import Tool							

Add/Import

The Add/Import functions (Type/Copy & Paste, Import a Formatted File, or use a Contact Import Tool) allow you to:

- Add new contacts
- And/or update details for existing contacts

Although you can use the Add/Import function to import a file that only contains updated details for existing contacts, we do not recommend it. By importing the updated contact information with the Update function instead, you can avoid accidentally adding a new contact that does not belong on your mailing list.

For help selecting and using the method for adding new contacts that will be most efficient for you, see Section 2.

Update

The **Update** function only includes the option to import a formatted file to update existing contacts' details. The additional ways to update existing contacts' details, lists, and email addresses are explained in *Section 3*.

If you use the Update function to import a file containing a contact that is not already in your Constant Contact account, that contact will not be added.

Before importing a file of contacts with either function: Use the instructions in *Section 2b* to arrange the contact information in a format that Constant Contact will recognize. This is necessary to prevent errors (*Section 6e - 6f*) and to make sure each contact detail will be stored in the appropriate field in your contacts' profiles.

IV. Importing Contacts from Gmail

You can import contacts that you have added to your Gmail or Google Contacts list directly into your Constant Contact account. Although this method doesn't require you to format the email addresses in a file, the only contact details you can import in this manner are first name and last name.

Note: If you are in the Email Marketing free trial, your trial will end as soon as your account contains more than 100 contacts even if 60 days has not passed.

To import contacts in your Gmail My Contacts list directly into Constant Contact:

- 1. Click the **Contacts** tab.
- 2. Click "Add/Import".
- 3. Put a checkmark next to the list(s) in which you want to add the contacts.
- 4. Click Next.
- 5. Select the fourth option, "Import Contacts from a webmail account".
- 6. Click Next.
- 7. Click on the Gmail logo.
- 8. A new window will appear asking permission to connect with Gmail.
- 9. Click Connect with Google.
- 10. On the following screen click **Grant access**. You will only have to grant access one time unless you want to use another Gmail account for future imports.
- 11. Put a check mark next to the contacts that you want to import. If you want all contacts to be imported, click the checkbox at the top of the entire list of contacts to select all contacts.

To select contacts by groups, click on the drop-down menu next to "Groups". You can only import one Gmail group at a time.

Note: When "All Contacts" is selected from the drop-down menu, the select all feature will be disabled. Only your first 5,000 Gmail contacts will be shown and only contacts in your My Contacts group. If you have more than 5,000 Gmail contacts you will need to export your contacts from Gmail and import them as a file.

- 12. Click Next.
- Review the list of contacts that you will be importing. To make changes click **Previous**.
 Note: If you go back to the previous step, you will need to re-select the contacts to import.
- 14. If the contact selection is correct, click Import.
- 15. Read the Permission Confirmation Checklist, check off all the boxes then click **Submit**. A message displayed confirming that the import has begun.
- 16. Click **Done** to close the import window.
- 17. To check the progress of the import, click **Contacts** > **Activity**.

Glossary

Active contact Any email address on at least one contact list in your Constant Contact account to whom you can send an email. Only active contacts count toward your total contact count for Email Marketing billing purposes. Active contacts do not include contacts that are in the "Awaiting confirmation" category or on your Removed or Do Not Mail lists. If an email address is on multiple lists, it only counts as just one active contact.

Activity page The page you should review in Constant Contact to find out if a file of contacts was imported successfully, without errors or warning messages. The page also displays list deletion, list merges, and other contact activity. To view it, click the **Contacts** tab and the "Activity" link below the tabs. Depending on the size of the list you are importing, the import may take up to two hours to complete. Click the **Refresh** button at the bottom of the page to view the activity's most current status. If you see error or warning messages, refer to *Section 6e-6f.*

Add/Import functions This refers to the following methods for adding new contacts and/or updating existing contacts' details:

- Type or copy and paste new email addresses with or without details
- Import a file containing your contact information (Note: If the file *only* contains updates to existing contacts, and you want to make sure no new contacts are added by accident, use the "Update" function instead of the "Add/Import" function).
- Download a contact import tool (see definition for Import Tools).

To access the Add/Import functions, click **Contacts** > **Manage Contacts** and click the "Add/Import" link in the My Contacts section. For more information about the difference between the Add/Import and Update functions, see *Appendix III.*

Confirmed Opt-In When this function is turned "On", everyone who joins your list through your online Join My Mailing List form receives a confirmation email immediately after signing up. They must respond to the confirmation email to verify their interest in receiving your emails. If the contact does not respond, he or she cannot receive any further email communications from you. We recommend that you turn the Confirmed Opt-in feature in your account "On" to lower your chances of getting spam complaints.

Contacts The people who have given you permission to send them email. They are sometimes referred to as subscribers, email addresses, recipients, or readers. All of your contacts must meet Constant Contact's permission requirements, as explained in *Section 1* of this guide.

Contact details Any piece of information you collect from your contacts that is not an email address. Commonly collected details include first name, last name, address, and preferred email type. When you insert a contact detail field into an email, each contact will see their own information appear in its place in their copy of the email. To see the list of standard contact details you should use to label each detail in a file you are importing, see *Section 4*. You can search for contacts or groups of contacts by their contact details with Basic and Advanced Search.

Custom field A place to store any contact information that is not included in Constant Contact's list of standard details. You can use up to 15 custom fields, each of which can contain up to 50 characters. You can customize your Join My Mailing List signup form to collect extra information from new contacts when they sign up. To find out how to label the information you want to store in custom fields when importing a file, see *Section 4.*

Do Not Mail list The group of contacts that do not want to receive email from you. Contacts are automatically added to this list if they unsubscribe from your emails or report your email as spam. You only need to add them to the list manually if they personally request to opt-out of your mailings (such as by replying to your email instead of clicking "Unsubscribe"). Contacts with the Do Not Mail status are not considered "active contacts" and do not count toward your total contact count for Email Marketing billing purposes. Unlike contacts on your Removed contacts list, you cannot re-add them to your lists without their help. If a contact on your Do Not Mail list wants to re-subscribe, see *Section 6*.

Duplicate email addresses You cannot add an email address to a single list twice. Constant Contact removes duplicate email addresses from lists for you. If you send an email to two lists at once, any email addresses that are on both lists will receive only one copy of the email. Read more about duplicate email address issues in *Section 6*.

Email type The format in which a contact prefers to receive your email (HTML or text only). By default, all of your contacts' email types are set to HTML. To change a contact's preferred email type, go to his or her Contact Details page, as explained in *Section 3a*. To add several contacts' email type preferences at once, use any of the methods for adding and updating contact details described in *Sections 2 and 3* of this guide. To specify contacts' email type preference in a file you are preparing to import, name the column heading "Email Type". You can optionally type "T" for text or "H" for HTML in the rows or lines below.

Existing contact An email address that has already been added to your Constant Contact account. For help updating an email address or contact details for a contact that is already on at least one of your contact lists in Constant Contact, refer to Section 3. **Import Tools** Free, downloadable software to help you transfer your permission based contacts directly from Microsoft® Outlook®, Outlook Express®, Windows Mail®, QuickBooks®, ACT! by Sage®, or Salesforce® into Constant Contact lists. To download an import tool, click the **Contacts** tab in your Constant Contact account. Then click the "Import Tools" link in the My Contacts section of the resulting page.

Join My Mailing List An online form that you can create with Constant Contact to allow people to sign up to receive your mailings. Create links to this form to include in your emails and on webpages. Customize it to collect additional contact details and allow new subscribers to sign up for specific lists. To get started with Join My Mailing List, click **Contacts** > **Join My Mailing List** and watch this short online tutorial: <u>http://www.constantcontact.com/display_media.jsp?id=15t</u>

List Review A routine phone call to Constant Contact Customer Care in which we discuss the source, type, and age of your email list with you. We also explain how to safely grow and maintain your contact list, remove "role" and illegitimate email addresses, and provide tips for creating emails that your contacts will not confuse with spam. If your list needs a review, you will see a message to call Customer Support when you attempt to log into your account. For more information, read the *List Reviews and Campaign Staging Guide* http://img.constantcontact.com/docs/pdf/listrev_staging_v02.pdf

Mailing lists A set of contacts, usually called contact lists, to whom you would like to send an email. If you customize your Join My Mailing List form, you can allow your contacts to select the types of emails that they're interested in receiving. To learn how contact lists work in Constant Contact before you add contacts to your account, see the beginning of *Section 2*. For help managing lists in Constant Contact, review the resources recommended in *Section 7*.

Notes field A field in each contact's profile that supports up to 500 characters. It is a place to store special information about a customer (such as their favorite products, personal preferences, a comment from a survey, etc.) that may not be appropriate for, or cannot be abbreviated into, a custom field. See also: *Section 4*.

Permission-based contacts Individuals who have a previous relationship with you or your business. You can acquire their email addresses through a signup form in a store, an online Join My Mailing List form from Constant Contact, through previous purchases, business acquaintances, or other personal relationships. See also: *Section 1*.

Permission Reminder A standard message that appears at the top of your email to remind your contacts why they are receiving your email. It gives them the opportunity to click an "Unsubscribe" link rather than report your email as spam. To verify that an email's Permission Reminder is turned ON before you send it, view its "Edit Email Message Settings/Header" page and choose **On** next to Permission Reminder.

Removed contact An email address that you deleted from all of your contact lists in Constant Contact with the "Remove" function. Unlike the contacts on your Do Not Mail list, you can re-add removed contacts to your lists at anytime. You can remove contacts individually or, with a .CSV file, in bulk. Constant Contact saves all of your removed email addresses, but they do not count toward your total contact count for billing purposes. To view all of your removed contacts, go to **Contacts** > **Manage Contacts** and click the "Removed" link in the My Contacts section. To find out how to remove a contact from your account, see *Section 6h.*

Role email address An email address that belongs to multiple recipients or a specific group. Adding this type of address to any of your Constant Contact lists is a violation of the Permission Policy (see *Section 1*). Constant Contact does not send to role email addresses because it is unlikely that all of the recipients would have given their permission to receive your email. Examples of role addresses include admin@domain.com, support@domain.com, webmaster@domain.com, etc. If you know that the role address belongs to a single person, ask them to give you another email address. If you added a role address to your account, move it to your Do Not Mail list.

Update function This term usually refers to the process of importing a file to update and add new details for contacts that are already in your account. Although you can use the "Add/Import" function to import updates to existing contacts' profiles, only the "Update" function can prevent you from accidentally adding email addresses that are not already on your permission-based lists in Constant Contact. There are, however, other ways to update existing contacts' details, as explained *Section 3* of this guide.

Valid email address Constant Contact only accepts email address having all of the following:

- The @ symbol
- Fewer than 80 characters
- Four or fewer characters after the dot (e.g. name@company.net)

• Only printable characters

Important notes:

- Addresses containing invalid characters (such as < , > , : , [, and]) will cause errors and cannot be added.
- Do not type an extra space before or after an email address.
- Although role email addresses may be valid, you may not add them to Constant Contact lists.
- If an email address was not added to your account successfully, you will see an error on the Contacts > Activity
 page.

Examples: Section 6f provides examples of common email address formatting mistakes.