

Making the Switch to Constant Contact®

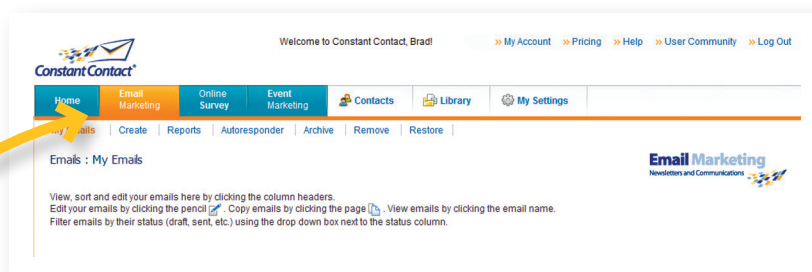
A quick, easy-to-use guide
for savvy online marketers

Making the switch is easy!



Sure, there are lots of companies out there that offer online marketing services for small businesses.

But when it comes to dialing into the challenges time-starved small businesses and nonprofits face, Constant Contact shines. We offer personalized coaching, and products and services that are simple to use. And we deliver robust educational resources that will help you become a smarter marketer – including a roadmap on how you can integrate **social media** into your email marketing and other online market strategies.



Because you're already familiar with email marketing, the guide will focus on how you can import your list of contacts into your Constant Contact account – whether they're in a spreadsheet, a database, CRMs, or even another email marketing service provider.

We'll show you how easy it is to move your contacts into Constant Contact, so that you can begin to realize the many benefits of our industry-leading Email Marketing.

Haven't started yet? You can begin by opening a **FREE 60-day trial of Constant Contact** – now or at any point as you read through this guide.

**Start your FREE
60-day trial now!**

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Import your list of contacts



Already have a list of contacts?

Constant Contact offers a contact import tool that makes it easy to import them into your Constant Contact account!

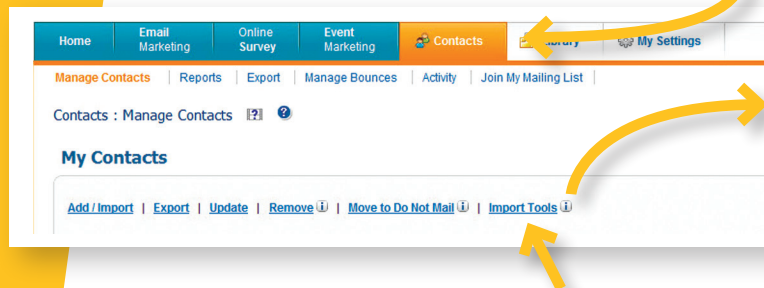
Importing your contacts using popular web programs

If contacts are stored in:

1. **Any of the following applications**, you can use the Constant Contact import tool to transfer them directly into your Constant Contact account:

- Microsoft® Outlook®
- Microsoft® Outlook Express®
- ACT!® by Sage®
- Salesforce®
- Intuit® QuickBooks®
- Contact Capture Tool

To download a contact import tool, click the **Contacts** tab in your Constant Contact account.



Where would you like to import your contacts from?

[Microsoft® Outlook®](#)

Import contacts from your Outlook folders, distribution lists, groups and categories into your Constant Contact account.

[Microsoft® Outlook Express®](#)

Import contacts from your Outlook Express folders, distribution lists, groups and categories into your Constant Contact account. Also compatible with Windows Mail.

[ACT!® by Sage®](#)

Import contact groups or individual contacts from your ACT! by Sage database into your Constant Contact account.

[Salesforce®](#)

Import contacts and download opt-out information - all from within your Salesforce Group, Professional Edition or higher account.

[Intuit® QuickBooks®](#)

Import contacts from your Intuit QuickBooks Pro or Premier database into your Constant Contact account.

[Contact Capture Tool](#)

Add and update contacts directly from your desktop on your PC or Mac. Use as a POS(Point of Sale) or as a quick way of adding contacts without having to login to Constant Contact.

Then click the **Import Tools** link in the **My Contacts** section of the resulting page.

2. **Your own application**, you may be able to use an Application Programming Interface (API). By the way, have you heard about the Constant Contact MarketPlace? (see TIP)

>>> TIP <<<

Need help making the switch?

At the [Constant Contact MarketPlace](#), you'll find solution providers ready to help you get the most out of your marketing. And you'll find software solutions - already integrated with Constant Contact - that will help you work smarter, not harder. Visit today.

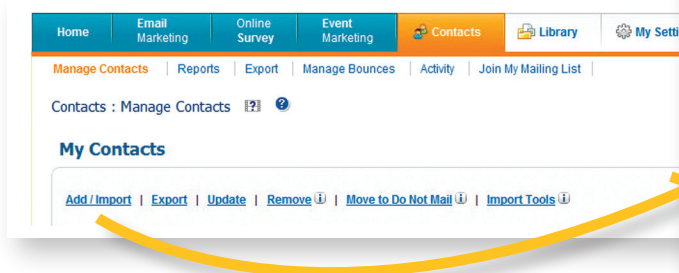
Import your list of contacts

Importing or adding new contacts from a file or webmail account

Here are **4 more common ways** to import or add new contacts to your list:

1. **Type or copy email addresses** – up to *one hundred* email addresses without contact details at a time.
2. **Type my email addresses and contact details** – add or update up to *ten contacts* with up to *four contact details* each at a time.
3. **Import my contacts from a file** – add up to *20,000* email addresses with or without contact details using .CSV, .XLS, or .TXT files.
4. **Import my contacts from a webmail file.**

Note: If you are exporting your contacts from another web based program you can export a .CSV file from that program.



► How would you like to add your list?
Select the method you would like to use for adding your list.

Be advised, your account is subject to the terms in our zero tolerance [Anti-Spam Policy](#).

- ☐ **Copy and Paste Contacts** ⓘ
Type or copy and paste my email addresses into Constant Contact
- ☐ **Add Individual Contacts** ⓘ
Type my email addresses and contact details into Constant Contact
- ☐ **Import Contacts from a file** ⓘ ⓘ
Import my list from a file on my computer
- ☐ **Import Contacts from a webmail account** ⓘ
Import contacts from Gmail or Google Contacts

Why permission-based email marketing?

Imagine your customers or prospects actually *looking forward* to receiving email communications from you. That's the beauty of permission-based email marketing. Because your recipients have asked to receive your emails, they're more likely to open them, read them, and act upon them.

But permission-based email marketing isn't just about smart marketing. It's also the law. The federal CAN-SPAM Act protects consumers from receiving unwanted commercial email.

Permission Confirmation Checklist

Only contacts that have given you or your business prior consent to receive communications can be used in Constant Contact. If your list does not meet each condition on the checklist below, select **Cancel**. **All boxes must be checked before your import can begin.**

- ☐ **My list is consent based** - All contacts have given me or my business their prior consent to receive email communications.
- ☐ **My list is NOT a third party list** - My list has not been purchased, rented, appended or given to me from any third party source.
- ☐ **My list does NOT contain role addresses or distribution lists** - E.g. email addresses that may be received by more than one individual: sales@, support@, users@, list@, etc.
- ☐ **My list does NOT contain email addresses** captured in my address book without prior consent. Including but not limited to: user group addresses, transactional addresses or auto-response addresses.

Violation of these rules will make you subject to our [Anti-Spam Policy](#) and may result in the immediate termination of your account. Please contact Customer Support with questions.

Submit

Cancel





Browsing and Searching for Contacts

Contact details help you find a contact's profile in your Constant Contact account – faster and easier. You can also use contact details to look for demographic trends and create targeted lists from your searches.

1. You can browse for contacts in a variety of ways:

- Search for a specific contact
- View all of your contacts
- View all contacts with a certain status (active, removed, awaiting confirmation, do not mail)
- View all contacts within a certain list
- View a contact list with contact details (by exporting your list)

My Contacts

[Add / Import](#) | [Export](#) | [Update](#) | [Remove](#) ⓘ | [Move to Do Not Mail](#) ⓘ | [Import Tools](#) ⓘ

▶ **463 Active Contacts**

View Contacts

- [All](#)
- [Active](#)
- [Awaiting Confirmation](#)
- [Do Not Mail](#)
- [Removed](#)

Basic search for contacts [Switch to advanced search](#) [Search Tips](#) ⓘ

Search in: Active ▼

for: Email Address ▼ beginning with ▼

2. You can search contacts within lists and search using these criteria:

- Email address
- Last name
- US state/CA province
- Zip/Postal code

If you want to search other or multiple fields consider the advanced search feature. 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.

Update existing contacts' details



Want to review the details of a contact? Simply click on the contact's email address.

The screenshot shows the 'List Details' for 'My Mailing List'. The contact list has columns for 'Email Address', 'Name', and 'Company'. A yellow arrow points from the 'Email Address' column to the 'Email Address' field in the contact details form. The contact details form shows the email address 'abc123@gmail.com' and other fields like 'First Name', 'Middle Name', 'Last Name', 'Home Phone', 'Address', and 'City'.

Choosing the best way to update information on a current contact.

If you are:

Here's the recommended way to update information:

Updating just a few contacts manually:

- Revise each contact's profile information – one by one – in your Constant Contact account.
- Include new details on up to 10 individual contacts, using "Add/Import."

Updating several details for multiple contacts (**Note:** 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).

Confirming 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 in the footer of any email they receive.)

>>> TIP <<<

Want to collect additional information on your contacts? Send them an online survey. It's a great way to gather new information using our custom fields – and confirm information you already have!

Clean your email list

Want to remove one or more email addresses from some or all of your lists?

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

Go to **Contacts > Manage Contacts**

In the **My Contacts** section, click **Remove**.

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.

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.

Click **Remove**.



Remove Do Not Mail QuickSend Move or Copy to: - Select List -

2 contacts, displaying all contacts.

| | First Name | Last Name |
|---|------------|-----------|
| <input type="checkbox"/> Select all contacts within this list | | |
| <input type="checkbox"/> Email Address | | |
| <input type="checkbox"/> abc123@hotmail.com | Ben | |
| <input checked="" type="checkbox"/> xxxxxxxx@gmail.com | Brad | |

2 contacts, displaying all contacts.

Remove and Do not mail

What's the difference between **Removing** a contact from your mailing list and placing a contact on your **Do Not Mail** list?

Removing a contact takes that record off your mailing list, but still allows you to add them again later.

Once a contact is on your **Do Not Mail** list, you cannot add them to any of your lists. For that reason, you should use **Do Not Mail** only when a contact asks to be removed from your mail list.

close

Would you like to remove the selected contact **abc123@hotmail.com** from all lists or just this list?

☐ All lists

☒ Just this list

Submit Cancel

Note: Contacts that click the **Unsubscribe** link in your email are automatically removed from your contact list and put on your **Do Not Mail** list.

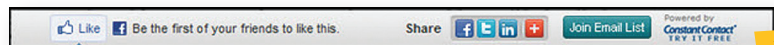


When it comes to your organization's success, managing your list of contacts is just part of the story. You'll also want to continuously add new, high-quality names to your list, as well. Constant Contact has the tools and resources to help you do just that.

As you'll soon discover, building your list of contacts is easier – and faster – than you might imagine. Here are some quick tips that will help:

- Add a **Join My Mailing List** to a web page or email.
- Add a **Join My Mailing List** sign up to your Facebook fan page and Twitter page.

- Add contacts to your account – wherever you are with **QuickView**, our free iPhone App.
- Place a **Join My Mailing List** sign-up book near your front desk, register, check-in area – wherever customers or members will see it. And don't be shy about asking them to give you their email address.



- Add a social media **share bar** – complete with a Join My Mailing List form – to the top of your Constant Contact emails. In addition, the share bar makes it super simple for your readers to share your emails and survey invitations – and expose your organization to a whole new audience of potential new contacts.
- **Contact Capture Tool:** Add right from your desktop – even when you are not logged in or talking to people. Easy to use with your PC or Mac.

Track contact activity with built-in online dashboard for all email communications, events, and online survey invitations.

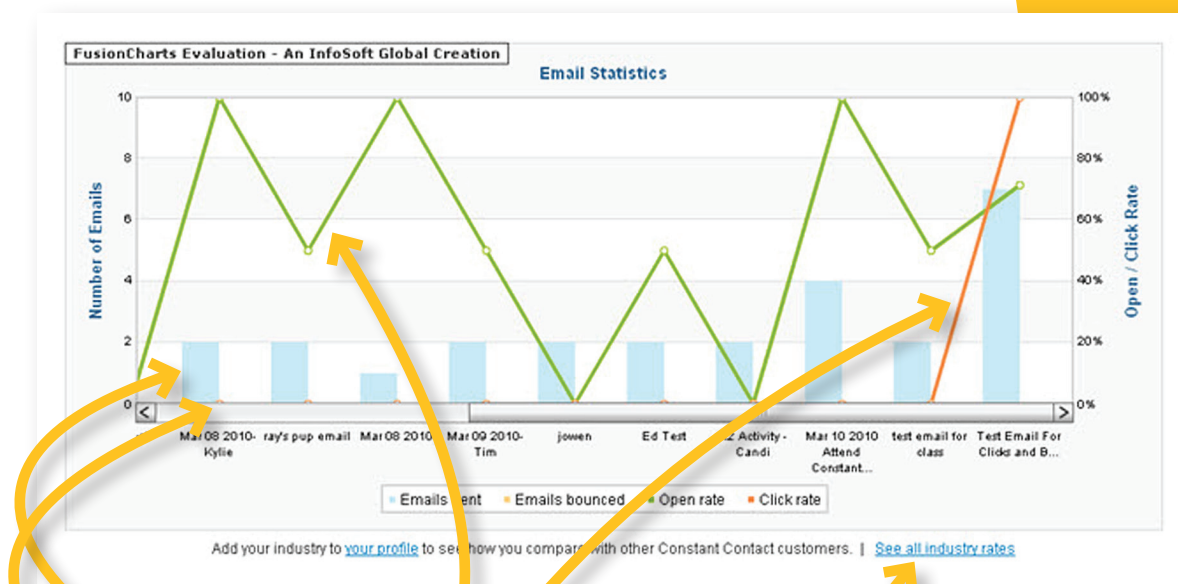
Raw Data will tell you:

- Who you sent the email to
- Spam reports
- Which emails bounced back*
- Opt-outs*
- Opens*
- Click throughs*
- Forwards to a friend*

* Also in contact details



Email Statistics Chart will show you:



- Emails sent
- Emails bounced
- Open rate
- Click through rate
- Industry average

>>> TIP <<<

Use Open & Click-throughs

to segment contacts. Save those who open and click a link as a new list and flag with specific interests based on what they clicked.

Resources



Additional Resources

Constant Contact offers a host of easy, informative, and educational materials to help you get up and running fast.

- Constant Contact [Learning Center](#)
- Constant Contact tutorials on [Contact List Management](#)

Guides to Getting Started



Tutorials on Getting Started

