### How-To Guide

### Add Your Contacts

Getting your contacts into your Constant Contact account is just as important as designing and sending your campaigns. After all, your contacts are the people those campaigns are going to. This guide will explain all of the ways that you can add your contacts. Before you get started, you need to have <u>permission to send email</u> to them. This is so you'll be compliant with <u>CAN-Spam</u> and <u>CASL</u> laws. To jump right in, click on an image for instructions for the method you're using.





v1.0 | 03.24.2016

### **Add Contacts**

How you add contacts to your account will depend on how you have those contacts stored already and what works best for you. You can choose to type them in, copy and paste, upload from a file or use an app to connect whatever program you use to your Constant Contact account.

#### Here's how to start:

- Log into your account. •
- Click the **Contacts** button.
- Then Add Contacts. Now you can choose how you'll add your contacts to your account.



Before you add your contacts, review these suggestions for ways to make the process even smoother!

Constant Contact //

Contacts Reports	Activity	Sign-U	p Tools					
Contact Mana	gemen	t					Add Contacts	•
Search Contacts	Advanced	Act	ive Contacts Lis	st (378)	N	Ту Up	pe in one contact pe in or paste contac pload from file	
378 Contacts Select contacts to organize, export or remove								<b>`</b>
4 Contacts			Name	Email	Company	÷	City, State	\$
• Active (378)								
<ul> <li>Unsubscribed (0)</li> </ul>			Elbert Allison	examplecontact@company				
<ul> <li>View All Contacts</li> </ul>			Francis Ball	examplecontact@company				
■ Email Lists	+		Sandy Barnes	examplecontact@company				
🗙 Yoga Classes	~		Tasha Barrett	examplecontact@company				
General	•		Cathy Blake	examplecontact@company				

# **Type in One Contact**

When you choose **Type in one contact** you get to <u>add a single contact with whichever</u> <u>details</u> you'd like to store. A contact can be created with as little as a name, email address, or social profile, but you can add as much information as you'd like. By default, the <u>permission check-box</u> is checked for you. Make sure to uncheck it if needed. When you're finished, click **Save**.





### **Type in or Paste Contacts**

Add Contacts -						
Type in one contact						
Type in or paste contacts						
Upload from file						
Add from other apps 💙						

If you have a bunch of contacts and only a few details for each one, choose **Type in or paste contacts**. From here, there are two options based on the amount of information you have.

#### **Enter Contact Details Tab**

Use the drop-downs to select what type of information you want to store in each column, and then type in one contact per row. You can enter up to five columns of information. If you don't need to use a column, just leave it with the default title of "Select".

### Add Multiple Contacts

Contacts must have at least first name, last name, email address, or social profile.

Enter contact details	Paste names & emails			
Email address - other 🔹	First name 💌	Last name 💌	- Select -	- Select -
1				



## **Type in or Paste Contacts**

#### Paste Names & Emails

Your other choice is to click the **Paste names & emails** tab. You can paste up to 5,000 contacts into this field. While this method is great when you only have email addresses, you can include names as well. Copy (**Ctrl** + **C**) your contact information, then click inside the field and Paste (**Ctrl** + **V**). Then click **Continue**.

### Add Multiple Contacts

Contacts must have at least first name, last name, email address, or social profile.



Paste names & emails

Enter names and emails, or just emails. Press Enter after each address.





## **Type in or Paste Contacts**

After you've entered the contact information, you need to add them to a list. By default, your account will have a General Interest list. You can create as many new <u>lists</u> as you need. You can also <u>tag</u> this particular group of contacts for future reference or to better segment your list and focus your marketing efforts. Click **Apply** when you're done, then click **Import.** 

### Add Multiple Contacts - Organize

Contacts must have at least first name, last name, email address, or social profile.



## **Upload From File**



Now you can preview how we will import your contact information.



## **Upload From File**

Make sure that Constant Contact is <u>correctly matching the column headers</u> from your file to the field names in your Constant Contact account. Click the drop-down to choose a different name if needed. You can create a custom field by choosing "Create New Custom Field" from the dropdown - just type in the name of your column.

Contacts Reports Activity Sign-Up Tools Autoresponder



#### Here's a preview from your file.

Make sure the columns in your file match the Constant Contact field names.

Preview (5 of 251 contacts shown, 3 columns total)

First name 🗸	Last name 🗸 🗸	Email address 🗸
		Email Type other 🗸
A	В	c
First Name	Last Name	Email address
Tom1	Thumb1	TomThumb1@google.com
Tom2	Thumb2	TomThumb2@google.com
Constant Contact°,		Page 8

## **Upload From File**

Now you need to add your contacts to a list. Every account comes with a General Interest list. You can create as many new <u>lists</u> as you need. You can also <u>tag</u> this particular group of contacts for future reference or to better segment your lists and focus your marketing efforts. Click **Upload** when you're done.



## Add from Other Apps - Gmail

### Add Contacts -

Type in one contact
Type in or paste contacts
Upload from file
Add from other apps 🔰

Bringing your contacts over from other applications is really easy, and there are several choices under the **Add from other apps**. We'll show you how to connect your Gmail account to your Constant Contact account and copy over your contacts.

First, make sure you're logged in to the Google account containing your contacts. You can do this in a seperate browser window. After you click **Add from other apps > Gmail** in Constant Contact, click Connect with Google.



If you don't want to use the Import tool you can always manually export your contacts from Gmail or any email client and use the Import from File instructions to get them into them to Constant Contact.

### Constant Contact /

### Import Contacts from Google

To add your Gmail contacts we'll need to connect with your Google account. For your security, we do not store any of your Gmail login information.

Cancel

Connect with Google



Page 10

# Add from Other Apps - Gmail

Next you'll give Google permission to connect with your Constant Contact account by clicking **Allow**. If you have multiple lists in your Gmail account, select which lists you want to copy to Constant Contact, then click **Continue**.

Google		leigh.grammer@g	gmail.com - If you select multiple Gmail lists, they will be combined into one Constant Contact list.
	- Constant Contact would lik	e to:	Add Contacts from Google - Select contacts
			Now, select the contacts you'd like to import from Google
	8 Know who you are on Google	<b>(</b> )	<ul> <li>All contacts</li> <li>System Group: Friends</li> </ul>
	View your email address	(i)	System Group: Family System Group: Coworkers
	Manage your contacts	(i)	
			Cancel Continue
	By clicking Allow, you allow this app and Google to use your inf with their respective terms of service and privacy policies. You other Account Permissions at any time.	can change this and	····





# Add from Other Apps - Gmail

Now add these contacts to a list. By default your account will have a General Interest list. However, you can create as many new <u>lists</u> as you need. You can also <u>tag</u> this particular group of contacts for future reference or to better segment your lists and focus your marketing efforts. Click **Import** when you're done.



You'll be asked to confirm that these contacts are yours and you have permission to mail to them.



# Conclusion

All of your newly added contacts and lists can be found under the Contacts tab. From here you'll be able to keep track of your contacts by <u>status</u>, <u>edit</u> or <u>delete</u> individual contacts, or even <u>export</u> your contacts list as needed.

Contact Management						Add Contacts	s <b>•</b>
Search Contacts Active Contacts List (378)			st (378)	Make	e Contacts my default	Contacts!	
4 Contacts		378	Contacts Select co	ntacts to organize, export or remov	'e		Grow your <u>contact list</u> with our list sign-up
• Active (378)		A	Name 🔶	Email	Company	City, State	forms and tools.
<ul> <li>Unsubscribed (0)</li> </ul>			Allison, Elbert	examplecontact@company			
<ul> <li>View All Contacts</li> </ul>		В					
Email Lists	+		Ball, Francis	examplecontact@company			- ( which is a could
General Interest	-		Barnes, Sandy	examplecontact@company			have an ap
Wknd Cycle Trips	-		Barrett, Tasha	examplecontact@company			to help γοι bring contacts direc
Yoga Classes	-		Blake, Cathy	examplecontact@company			into Contstant
View All Lists			Bowers, Philip	examplecontact@company			Contact. Check out of Marketplace.
	_		Briggs, Lula	examplecontact@company			<u>Murketpiace.</u>
Tags	+		Brown, Reginald	examplecontact@company			
\$10 New Customer Off	i 💌		Burke, Kendra	examplecontact@company			
<ul> <li>April (13)</li> </ul>	•		Burns, Kent	examplecontact@company			
<ul> <li>August (13)</li> </ul>	-		Burton Pay	examplecontact@company			