

QuickStart Guide

Switching to Constant Contact

Welcome to Constant Contact, the #1 in email marketing for small businesses,* with over 20 years of experience helping small businesses, nonprofits, and individuals succeed.

*as ranked by Website Magazine



Constant Contact Features

Our online marketing platform is more than just email marketing. With Constant Contact, you can drive powerful results through beautiful emails, effective sign-up tools, digital advertising, and more. These are just some of the amazing features you can take advantage of in your Constant Contact Account:

Support & Pricing

- Free, live marketing advice and support
- [Prepay](#) and [nonprofit discounts](#)
- Unlimited email sends
- Unsubscribed and duplicate contacts don't count towards your billing

Email

- Hundreds of customizable, mobile-responsive [email templates](#) to choose from
- Create, edit, and send emails [from your desktop or mobile device](#)
- [RSVPs](#), [Polls](#), [Surveys](#), [Coupons](#), [Donations](#), [Dynamic Content](#), and more
- Trigger-based [Automated Email Series](#), automated [Welcome Emails](#), and recurring [Birthday and Anniversary Emails](#)
- Easy-to-understand, real-time [reporting](#)

Contacts & List-Growth

- [List-building tools](#), including landing pages, pop-up sign-up forms, and more
- [List segmentation](#) by contact details, email engagement, click habits, purchase activity, and more
- [Integrations](#) with Eventbrite, Shopify, BigCommerce, MINDBODY, Salesforce, Outlook, Facebook, and more

Digital Marketing Tools

- [Facebook](#), [Instagram](#), and [Google ads](#) to grow your business
- [Social media posting, monitoring, and analytics](#)
- Free [website builder](#) and [online store](#)
- Free [LogoMaker](#) to create a professional, custom logo for your organization
- [SEO tools](#) to help you get found by potential customers

Getting Familiar With Your Constant Contact Account

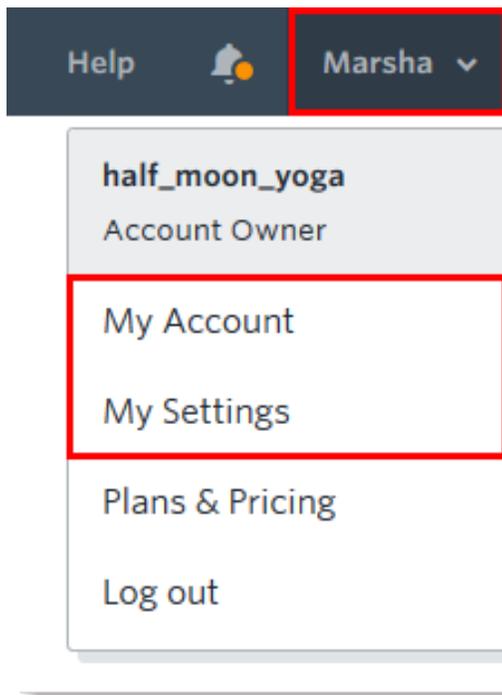
To help you with the transition to Constant Contact, we've outlined some of the differences you'll encounter if you're switching from Mailchimp.

Mailchimp	Constant Contact
In Mailchimp, your total collection of contacts was your Audience .	In Constant Contact, your audience is simply known as your Contacts .
In Mailchimp, Groups are used to sort your contacts based on their interests and preferences.	In Constant Contact, you use Email Lists to group your contacts however makes sense for your organization.
<p>Merge Tags were how you added personalized details in your emails, such as a contact's name or information from your account.</p> <p>To insert dynamic content into your email and show unique content to subscribers with different profiles, you would use Conditional Merge Tag Blocks.</p>	<p>To add personalized details in a Constant Contact email, you select Insert > Contact Details or Account Details. Learn more.</p> <p>To show or hide content based on a specific contact detail, you can turn any block into a dynamic content block by clicking the lightning bolt symbol. Learn more.</p>
In Mailchimp, an Embedded Form is a sign-up form that lives on any page of your website.	In Constant Contact, we call these embeddable forms Inline Sign-up Forms .

Getting Familiar With Your Constant Contact Account

Once you log into your account, there are a few areas you'll want to become familiar with to get up and running:

Account Settings



Click the profile name in the upper-right corner and select “My Account” from the drop-down to:

- View billing activity and statements
- Edit your billing and payment information
- Update your profile information
- Manage account users
- Set up email (domain) authentication

[Updating Your Account Information](#)

Select “My Settings” from the drop-down to:

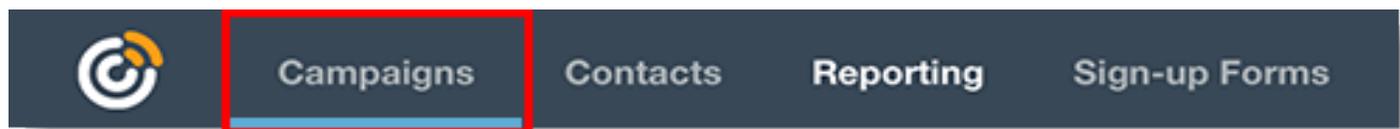
- Update your organization information
- Update your default From Name
- Manage your custom fields for contacts
- Enable Confirmed Opt-in (or double opt-in)

[Set Up Your Account Settings](#)

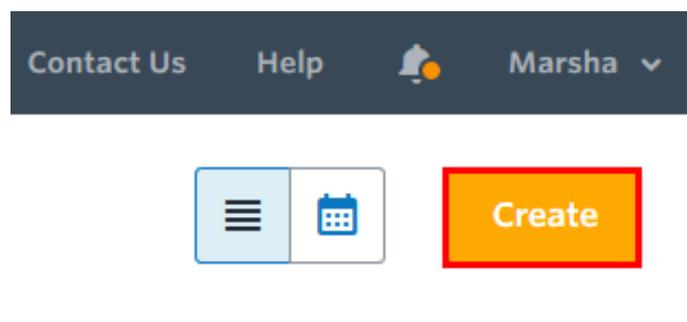
Getting Familiar With Your Constant Contact Account

Campaigns

You'll find all your campaigns under the **Campaigns** tab. Campaigns can be standard or automated emails, social posts, ads, surveys, or landing pages.



On this page, you'll see the details for each campaign you've created, including some reporting stats for sent and active campaigns. Click the name of the campaign or the hyperlinked reporting numbers to see more details.

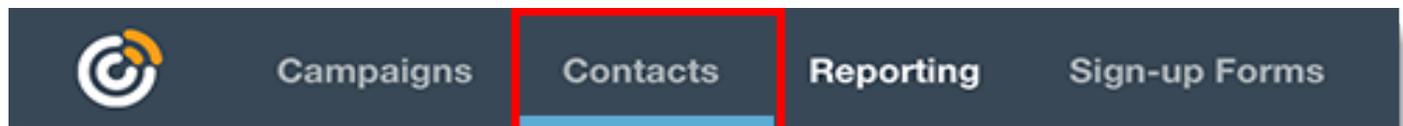


To create a new campaign, simply click the **Create** button.

Getting Familiar With Your Constant Contact Account

Contacts & Sign-up Forms

You'll find and manage your contacts, email lists, and segments under the **Contacts** tab.



A **General Interest** email list is automatically created in your account for contacts to be added to, but you can create as many lists as you want to divide your audience.

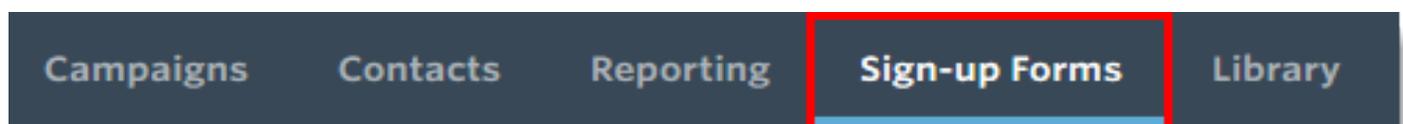
Tags are like labels for your contacts, which can be used to create sub-groups of your lists. You can further divide your contacts into groups by creating custom **segments** based on specific criteria, such as their engagement with your emails.

Campaigns can be sent to multiple email lists or to a single segment, and you can choose to exclude or exclusively send to contacts with a specific tag.

Check out the below help resources to learn more:

- [Create a Contact List](#)
- [Use Tags to Segment and Target \[Video\]](#)
- [Create Custom Segments of Your Contacts](#)

The **Sign-up Forms** tab is where you'll find all our list-growth tools, including inline sign-up forms, pop-up sign-up forms, landing pages, and Facebook lead ads.



When creating your sign-up forms, you can choose which contact details you want to collect from subscribers, such as their name, birthday, state, and more, as well as which email lists they want to be on. If you want to collect additional information about your contacts, you can create custom fields in your Settings. [See how.](#)

Importing Your Contacts Into Constant Contact

Now that you're familiar with your account, it's time to add your contacts! Whether you need to import your contacts from another email marketing platform, e-commerce platform, business software, or personal email account, we've got you covered.

Want some help importing your contacts? Feel free to [contact Support](#). Or if you'd prefer to do it yourself, check out the list of help articles below:

- [Export Contacts from Mailchimp to Import into Constant Contact](#)
- [Export Contacts from Nutshell into Constant Contact](#)
- [Upload a Contact List into Constant Contact from a File or Spreadsheet](#)
- [Import Google Contacts into Constant Contact](#)
- [Export Contacts from Microsoft Outlook to Import into Constant Contact](#)
- [Import Eventbrite Contacts into Constant Contact](#)

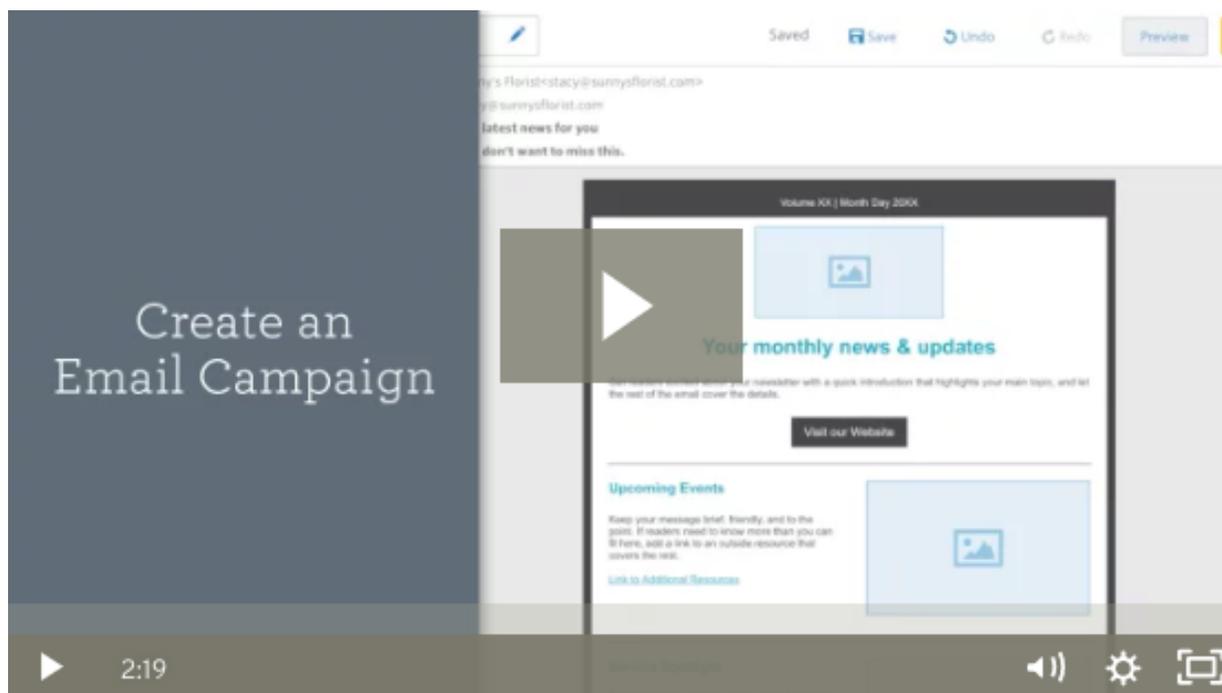
Don't see your program or option here? Check out the different ways you can add your contacts to Constant Contact:

[Methods for Adding Contacts to your Constant Contact Account](#)

Creating Your First Constant Contact Email

With your contacts added, let's create your first email! Our email editor is packed full of amazing features and user-friendly functionality. Simply pick a template, customize the design, and add your content.

We have all the help resources you need to help get your first email out the door:



- [Create a Branded Email Using the Branded Template Builder](#)
- [Optimize the Subject Line of an Email](#)
- [Preview Your Email](#)
- [Send a Test Version of Your Email](#)
- [Schedule and Send Your Email](#)

Creating a Constant Contact Sign-up Form

To continue growing your contact list, you'll want to set up a new sign-up form. You can create multiple sign-up forms and customize the content for specific audiences.

With Constant Contact, you have a few different options for sign-up forms:

- **Create a Pop-up Sign-up Form** - A Pop-up Sign-up Form will visibly pop up on your website after a designated amount of time or when someone goes to leave. [Learn how to create a Pop-up Sign-up Form.](#)
- **Create an Inline Sign-up Form** - An Inline Sign-up Form can be embedded on different pages of your website with a little HTML code. [Learn how to create an Inline Sign-up Form.](#)
- **Create a Lead Generation Landing Page** - A Landing Page is a page that you can create to share a little more about your business with your contacts, as well as collect new sign-ups. You can share the URL on your social media pages or wherever you communicate with your contacts. [Learn how to create a Lead Generation Landing Page.](#)

Check out some of the other ways you can grow your list with Constant Contact:

[Help Overview: Constant Contact Sign-up Forms](#)

Next Steps:

- [Set up a Welcome Email](#) to automatically send to your new sign-ups.
- [Segment your contacts](#) to send more targeted emails.
- [Check your reporting](#) and see how you can improve your email performance.

Helping small business do more business



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