Creating an Email with Constant Contact

A step-by-step guide



About this Manual

Once your Constant Contact account is established, use this manual as a guide to help you create your email campaign Here's what you'll learn:



And no matter what stage you're at when editing, sending, or viewing your email, you can quickly access help and assistance in a way that works for you.

Click the Help link in the upper right-hand corner to open the Resource Center

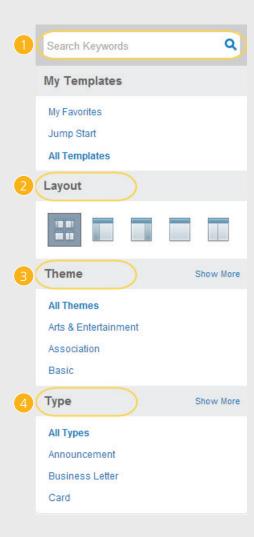
Click 3 for help relating to the page you're viewing

Click • to open a topic-specific help window

Contents

Step 1:	Step 3:	
Choose a template	Schedule and send	15
	Preview and Test	14
Step 2:	Email Settings	15
Customize a template5	Schedule to Send	17
Email Name5	Step 4:	
Inbox delivery options6	Promote and measure	
Email Header6		
Email Footer7	View email details	18
Design & content	Using SimpleShare	18
Set Colors & Fonts	View reports	19
Add Blocks		
Remove Blocks9	Need more help?	
Move Blocks9	FAQs	20
Edit a Block10	Tutorials	20
Block Toolbar10	Checklists	20
Add Elements to Blocks	Cricciiss	·····
Using images12		
Add Images within a Template12		
Delete Images from a Block12		
Edit Images within a Template13		
Manage Existing Images13		

Choose a template



First, log in to your account and click the **Email** tab. Then, click the **Create** link in the top navigation bar. Now you can select your template. There are a number of ways to decide which template you want to use. You can browse through all templates without searching for anything specific, or use the filters in the left navigation box to narrow down your options.

- 1 Search by **Keywords** based on color, industry, or topic.
- 2 Browse by **Layout**, focusing on how you want to organize pieces of your email. In some cases, it helps to mimic the layout of your website (if you have one).
- 3 Browse by **Theme**, but don't feel limited to only those that match your industry—they can all be customized to fit your brand or organization.
- 4 Choose by **Type**, if you've decided that you're sending a newsletter, an announcement, an invitation, etc.

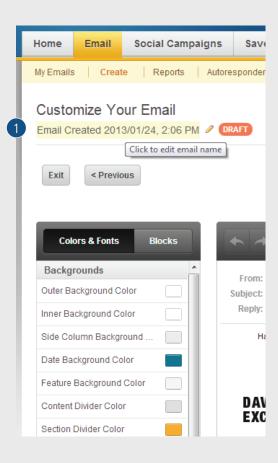
No matter which method you use, hover over any template thumbnail and click the **Preview** button to see a bigger sample.

Don't stress if you can't find the perfect pre-made template for your email. Every template can be tweaked as little, or as much, as needed to fit your brand. Once you've found one you like, hover over it and click **Select**.





Customize a template



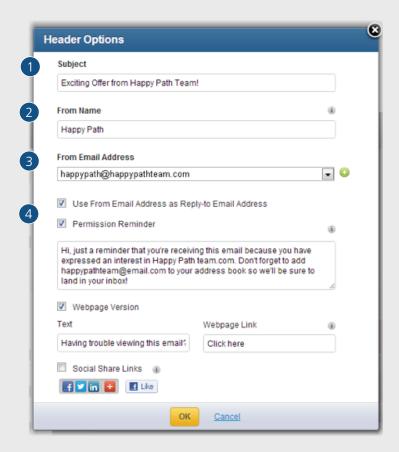
Before getting into the nitty-gritty of editing the template, start with the most basic task of naming your email.

Email Name

- 1 At the top left of screen, click the text that says **Email** Created with today's date and time.
- 2 Type in a name that will help you easily identify the email in a list (your contacts will not see this name). Example: "Fall Festival Update"

Next, we'll get down to blocks. All email templates are sectioned into blocks. Each block contains text and/or images that can be edited. Most blocks can be repositioned, added, and removed, to create a template layout that works best for you. To see the blocks, **move your cursor** over the template. As you do this, rectangles with block titles will appear around the blocks you can edit.

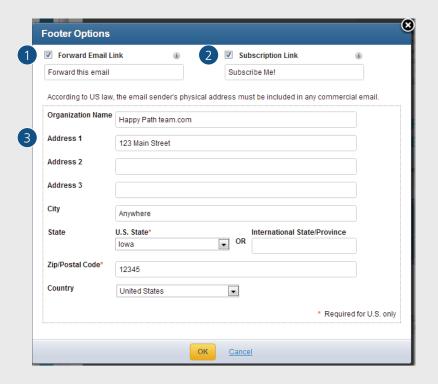




Email Header

To set each item, click the **Header Options** block.

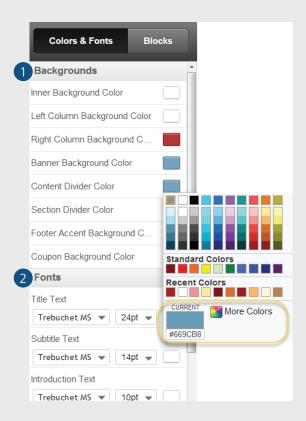
- 1 Subject: Enter a subject line that's as specific as possible in describing what your email is about. Put the most important words first, but remember, the longer the subject line, the more likely it'll get cut off in Inbox view.
- **2 From Name:** Enter a name that your readers will recognize in your inbox. Typically, the name of the business or organization is a good choice.
- **3 From Email Address:** Enter an email address that includes your business' name or the name of a well-known business representative.
- 4 Optional (but recommended) additions:
 - a. Use From Email Address as Reply-to Email Address: Check this box if you want to use the same address to receive replies from readers. If you have a separate address, such as a customer support email address, that you want to use to handle replies, leave the check box empty.
 - b. **Permission Reminder:** Check this box if you want to remind readers why they're getting your email, and give them a chance to add your email address to their contacts list. You can customize the message if you want.
 - Webpage Version: Check this box to allow readers to view your email as a webpage (handy for image rendering).



Email Footer

The Footer block, located at the bottom of the template, contains your physical address and some extra features. To set each item, click the **Footer** block.

- 1 Forward Email Link: Provides readers with an easy way to share the email with their friends, and gives you an extra method of growing your list.
- 2 Subscription Link: When subscribers forward the email to friends, those friends can subscribe to your mailing list through this link.
- **3 Physical Address (required):** Fill in each field as marked. Per CAN-SPAM rules, all email communications must include the physical address of your company or organization.



Now, we get to the fun and creative part—changing the look and feel of the template to match your company or organization. Customize a bunch or a little to achieve the appearance you want!

Set Colors & Fonts

First, locate the toolbar on the left of the template editor. To quickly change large sections of colors and fonts, click the Colors & Fonts button.

- 1 To **change a color** for backgrounds, fonts, or borders, click the colored rectangle associated with the part you want to change.
 - a. You can choose from standard colors, or click More Colors to enter a HEX code, RGB numbers, or select a custom shade
- 2 To quickly **change font type and font size for multiple blocks**, find the block name in the left navigation bar under "Fonts" and use the dropdown menus. Font type and size can also be changed when editing individual blocks—this is just a shortcut.

Note that these global color and font options are only available when you're viewing the template. When you're editing an individual block, you can change colors and fonts for that block using the block toolbar options.

Tell me more...

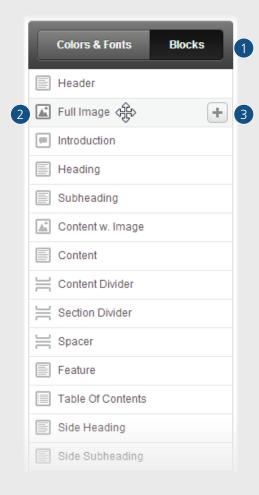
What are HEX color codes?

These web-friendly colors are identified by unique 6-digit codes, made up of numbers and letters, starting with #. Web browsers interpret the code to produce the color associated with it.

What are RGB color codes?

These colors are similar to HEX codes, but they require a different combination of numbers





Add Blocks

Sometimes, you might want more "Promotion Blocks" or "Divider Blocks" in your template than what's built in. To add more blocks to your template, use the **toolbar** on the left of the template editor.

- 1 Click the **Blocks** button.
- 2 Click and hold on the item you want to add, then drag and drop it into position in your template.
- 3 You can also use the icon to add a block to your template. When added this way, the new block is inserted in the default position of the template.

Remove Blocks

If your template includes more blocks than you need, or you accidentally add one you don't want, it can be removed. To delete a block:

- a. Hover over a block you want to move.
- b. **Click** the icon in the top right of the block.
- c. Click OK to confirm the deletion.

You can always add blocks back in using the Add Blocks steps above.

Move Blocks

To move a block to a different spot:

- a. Hover over a block you want to move.
- b. **Click and hold** the icon in the top right of the block.
- c. **Drag** the block to a new location, and release the click to drop it in.



Edit a Block

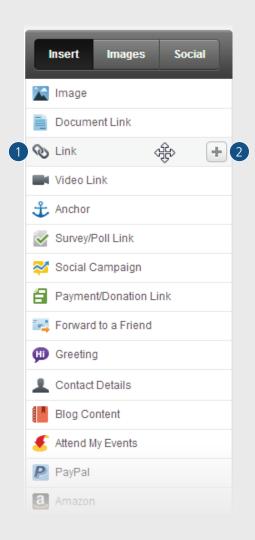
Move your cursor over the template. As you do this, rectangles with block titles will appear around the blocks you can edit. To **edit a block**, just click inside the rectangle area and the block toolbar will appear.

Block Toolbar

With the block selected, you can change multiple formatting options. **Highlight** the text you want to format, then choose from:

- 1) Font type, font size, and font color
- 2 Bold, Italic, and Underline
- 3 Left, center, right, and justified alignment
- 4 Indenting
- 5 Bullets and number lists
- 6 Background color
- 7 Links

You can also run **Spell Check** on the whole block (no need to highlight text), and check the HTML code (for advanced users who know HTML)

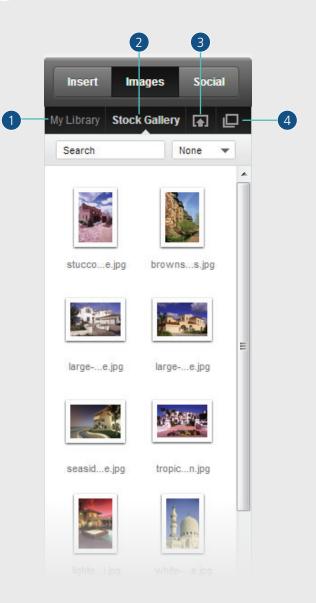


Add Elements to Blocks

With a block selected for editing, the toolbar on the left changes to display Insert, Images, and Social tabs.

- 1 Click and hold on the **element** you want to add, then drag it into the block.
- 2 You can also use the icon to add an element to the block. The element will be added to the default position, or wherever the text insert cursor is located. *Note:* Some elements require more information, and you'll be prompted to provide it once the element is added to the block.





Let's take a look at using images. When used appropriately, images can add visual appeal to your email communications. You can upload and edit images while you're working on a template.

Add Images within a Template

With a block selected, click the **Images** tab in the vertical toolbar located to the left of the editor. You'll see four sections in the sub-navigation bar:

- 1 My Library stores all the images you previously uploaded.
- 2 Stock Gallery contains images provided by Constant Contact for use by customers subscribed to My Library Plus (see p. 13 for more info).
- 3 The **upload** icon allows you to upload new images to your Library for use in the current template, or for later use.
- 4 The **insert** icon opens the Insert Image window, where you can review and insert existing Library images, Stock images, or images located on a direct URL.

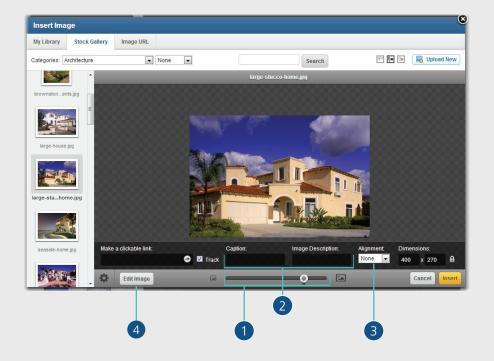
Images can also be inserted via drag & drop:

- a. Hover over an image under My Library or Stock Gallery in the vertical toolbar, then click, hold, and drag it into the block.
- b. The image will be resized to fit the block and/or the size of the image being replaced.

Delete Images from a Block

With a block selected, hover over the image and click the icon. In the menu, click **Delete**.

Customize a template



Edit Images within a Template

With a block selected to edit, click the **Images** tab in the toolbar on the left. Then, double-click an image from My Library, Stock Gallery, or upload a new image.

From the **Insert Image** window, you can make multiple image changes:

- Use the vertical slider to resize the image.
- 2 Add a caption and image description. Captions will always appear with the image, but the image description only shows up when the image can't load within a reader's inbox.
- **3** Change the alignment of the image to appear in the block.
- 4 You can also manually **set the image size** using the Dimensions fields. The dimensions are automatically locked to avoid image distortion.

Edit Image | button lets you make detailed image edits, like exposure, rotate, crop, and photo filter effects. We've partnered with PicMonkey to make this feature available, and the image is saved to your library when you're done.

Manage Existing Images

MyLibrary is where all your images are stored. You can preview and edit the images, create and manage folders of images, and delete images from your library. Just click on the Library tab at the top of the page (sandwiched between Contacts and My Settings).

Want more images?

Add MyLibrary Plus for just \$5/month to get these features:

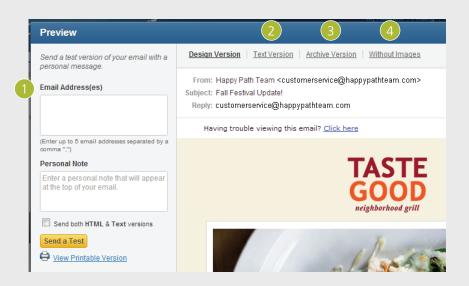
- Access to a stock image gallery of 4,000 images File management tools
- Storage for hundreds of your own pictures - More space to upload larger files

How can you get MyLibrary Plus?

Follow these instructions and start adding pictures and PDFs today!



Schedule and send



Preview and Test

To see how your email will look to a recipient, click the **Preview** button in the top navigation bar of the editor. In this window, you can:

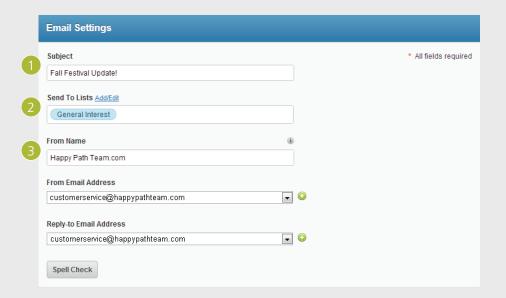
- 1 Send a test email to yourself or a friend to check the layout, links, and overall formatting to make sure it's what you want before sending to your list.
- 2 View the text version shows you the plain-text layout (if subscribers can only receive plain-text emails).
- **View the archive version**, if you have the Archive add-on.
- 4 View without images gives you an example of what recipients might see if their images are blocked by their email provider. If you used image descriptions, they will be shown in place of images.



STEP

Schedule and send





When you're happy with your email template, click the **Continue** button to move on to the scheduling step. Here's what you'll need to do:

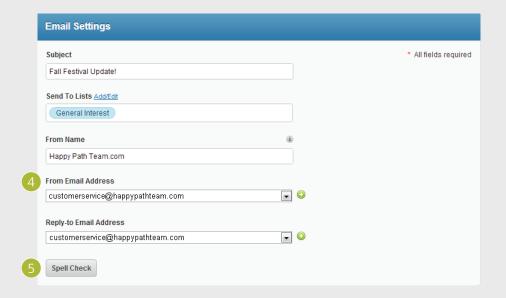
Email Settings

- 1) Subject: Enter a subject line that describes what your email is about. Put the most important words first, but remember, the longer the subject line, the more likely the last few words will get cut off in Inbox view.
- 2 Click the Add/Edit link next to the Send To Lists field. Select the check box next to an existing list of contacts, or you can add a new list through the New list link.
 - a. If you add a new list, enter the list name, then click Save.
 - b. The new list appears in the complete list of contact lists.
 - c. Click the ② icon to add contacts to the list.
 - d. **Type or paste** email addresses into the empty box, making sure to put each address on its own line and deleting any extra blank spaces before and after each address.
 - Have a large list? Click the Contacts icon in the top navigation bar, and then click the Add & Update button. From here, you can upload a file or spreadsheet, or add from your Gmail, Outlook, or CRM tools.
 - e. **Click Save**, and select the check box next to the list(s) you want to send your email to.
 - f. Click OK.
- From Name: Use a name that your readers will recognize in your inbox. Typically, the name of the business or organization is a good choice.

STEP

Schedule and send





- 4 From Email Address: Use an email address that includes your business' name or the name of a well-known business representative. Example: mybusiness@email.com.
 - a. If you don't see the email address you need to use, click the icon next to the drop-down lists.
 - b. Type in the new address, then click Verify.
 - c. **Check your inbox** for that email address. An email from Constant Contact will be delivered asking you to verify that you own the address. Then, come back to the template and select it from the drop-down list.
- 5 Run **Spell Check** to catch spelling errors in the template before it gets sent.

Tell me more about Email Archive

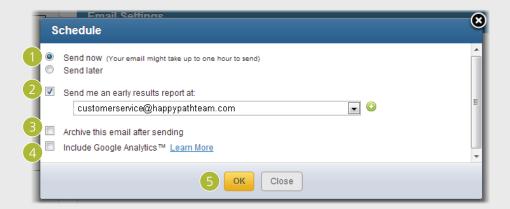
Share your newsletters and promotions on your website or blog to generate new interest. Add Email Campaign Archive to your Email Marketing account and instantly turn emails you've already sent into easy-to-view web pages—and turn online visitors into email subscribers.

Interested? To add Email Campaign Archive to your Email Marketing account, log in and go to the My Account link. Or, give us a call at (866) 289-2101.

STEP

Schedule and send





Schedule to Send

When you're satisfied with the email settings, click the **Schedule** button.

- 1 Choose to send your email now, or send later. If you select **Send now**, your email will be sent within the next hour. If you select **Send later**, pick a future date and/or time to send the email (anything later than the current time).
- 2 To get a report of **early open and click results** emailed to you, click the *Send me an early results report* check box, then select the address you want the email to go to.
- 3 If you have the Archive add-on, select the "Archive this email after sending" check box to add this email to your archives.
- 4 If you use Google Analytics™, you can include tracking on your links to see how your emails drive traffic to your site. Check the box next to "Include Google Analytics™" to activate this feature and enter the Google Analytics Campaign Title.
- 5 Click **OK** to schedule or send your email!





Congratulations! Your email is ready to go. Now's the time to think about promoting your email and measuring its results. You should be seeing the **Email Details** page. This page shows you the Email Settings of the email you just created, Social Sharing options, and the date/time the email will be sent.

Using SimpleShare

Want to spread the word about your latest email on Facebook, Twitter, or LinkedIn? You can easily increase visibility and grow your contact list by sharing the email with your connections. Here's how:

- 1 Click the **Simple Share** button.
- 2 To connect Constant Contact to your social profiles, click the desired **social network icon**. You'll be prompted to log in to that account through Constant Contact. Once logged in, select the personal profile or business page you wish to add, then click **Continue**.
- 3 To add another social network, click **Add link** on the top right next to Accounts and select a network. Repeat steps 2-3.
- 4 After connecting to your networks, you can review and edit the posts Constant Contact will send to each profile for your connections to see. When satisfied with the messages, click **Save** and close.

When your email is sent, these messages will be posted to your network(s).

You can also take the following actions on this **View Email Details** page:

- Copy the email, if you want to make changes to send to another group of contacts.
- Unschedule the email, as long as it hasn't been sent yet.
- Click I'm Done when you're finished with this page.





Sending the email is the first step in building a successful campaign. The second step is to review your results through the Reports tab, and adjust your marketing efforts based on those results.

- 1 Click the **Email** tab in the top navigation bar, and then click the **Reports** tab in the sub-navigation bar.
- 2 The **Email Statistics** graph is a representation of the reported data for past emails sent. It shows the number of emails sent, total emails bounced, the open rate, and the click rate. To view results for a specific email, click the name of the email in the Emails list below the statistics chart.

For detailed information on using the report results to fine-tune your next email campaign, see <u>How to Use Email Reports for Better Results</u>.

Need more help?



There's a wealth of information available at ConstantContact.com. Here, we gathered up the most relevant articles to keep you moving forward with your campaigns. Take a look when you're ready.

FAQs

- How can I find an email template I like?
- What should I say in my subject line to ensure optimum delivery?
- How do I use the From name field and subject line more effectively?
- How do I match colors to my website or logo colors?
- How do I add more blocks to my email?
- How do I add or attach an image to an email?
- How do I view Google Analytics Report?
- What is the time-of-day scheduling option?
- What are the average open, click-through, and bounce rates of other Constant Contact customers?

Tutorials

- Getting started with Email Marketing
- Choosing the right template
- <u>Using SimpleShare</u>
- Choosing Colors and Fonts

Checklists

• Get ready to send your first email!



Online Engagement Marketing tools & coaching to help small businesses and nonprofits grow.



Email Marketing

Build relationships from the inbox that keep customers coming back.



Social Campaigns

Turn Facebook "likes" and shares into real, measurable results.



EventSpot

Control every phase of the event process from one place.



SaveLocal

Create deals your way and find your next great customer.



SinglePlatform

Customize your online listings and stand out to new customers.









