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

Here's what we'll go over:

Constant Contact is more than just email marketing—you can drive powerful results through beautiful emails, effective sign-up tools, digital advertising, and more! This guide will help you transition from your old marketing platform and get up and running in your Constant Contact account right away.

Constant Contact features

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

- Unsubscribed and duplicate contacts don't count towards your billing

Email:

- Hundreds of customizable, mobile-responsive email templates

- Create, edit, and send emails from your desktop or mobile device

- RSVPs, Polls, Surveys, Dynamic Content, and more

- Trigger-based automation paths, automated Welcome paths, and recurring Birthday and Anniversary paths

- Easy-to-understand, real-time reporting

Contacts & list-growth:

- List-building tools, including landing pages, pop-up forms, and more

- Segmentation by contact details, email engagement, purchase activity, and more

- Integrations with Shopify, MINDBODY, Salesforce, Canva, and more

Digital marketing tools:

- SMS Marketing to reach your contacts via text messages

- Facebook, Instagram, and Google ads to grow your business

- Social media posting, monitoring, and analytics

- SEO tools to help you get found by potential customers

Get familiar with your 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.

In Mailchimp:

Your total collection of contacts was your **Audience**.

Groups were used to sort your contacts based on their interests and preferences.

Merge Tags were how you added personalized details in your emails, such as a contact's name or information from your account.

To insert dynamic content into your email and show unique content to subscribers with different profiles, you would use **Conditional Merge Tag Blocks**.

An **Embedded Form** was a sign-up form that lived on any page of your website.

In Constant Contact:

Your audience is simply known as your **Contacts**.

You use **Lists** to group your contacts however makes sense for your organization.

To add personalized details in a Constant Contact email, you select **Insert** > **Contact Details** or **Account Details**. Learn more.

To show or hide content based on a specific contact detail, you can turn any block into a dynamic content block by clicking the **light bulb symbol**. Learn more.
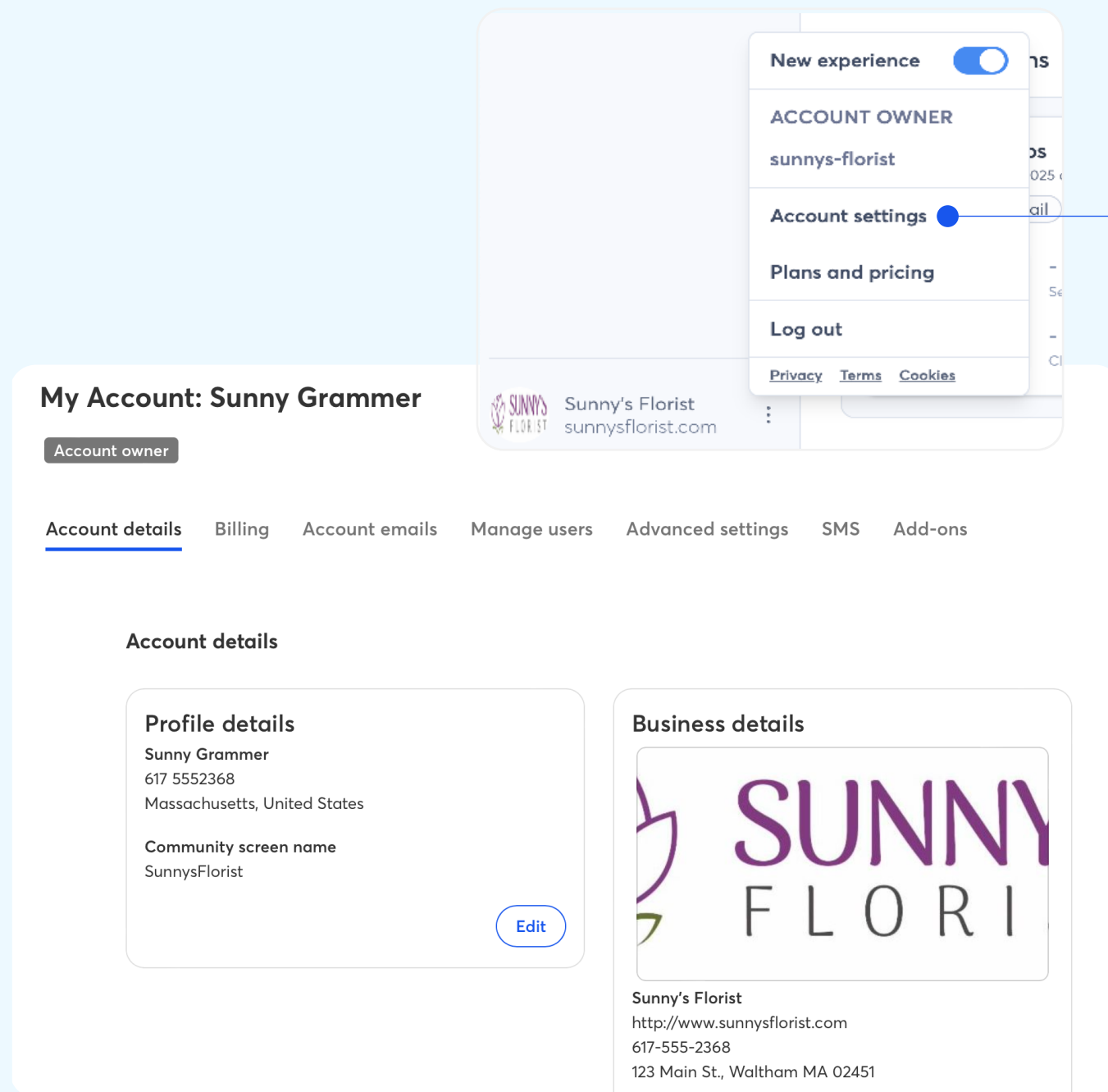
We call embeddable forms **Inline Sign-up Forms**.

Account settings

To get started:

1. Click the three dots in the lower-left corner.

2. Select **Account settings** from the menu to [manage your default settings](#).

This is where you can:

- Add or update your profile and organization details

- Manage your login information

- Edit your billing and payment info

- Add and manage account users

- Set up email authentication if you have your own domain

- And more

New experience

ACCOUNT OWNER

sunnys-florist

Account settings

Plans and pricing

Log out

Privacy   Terms   Cookies

Sunny's Florist
sunnysflorist.com

My Account: Sunny Grammer

Account owner

Account details	Billing	Account emails	Manage users	Advanced settings	SMS	Add-ons

Account details

Profile details
Sunny Grammer
617 5552368
Massachusetts, United States

Community screen name
SunnysFlorist

Edit

Business details

SUNNY
F L O R I

Sunny's Florist
http://www.sunnysflorist.com
617-555-2368
123 Main St., Waltham MA 02451

Marketing campaigns

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

To create a new campaign, simply select a campaign type from the drop-down and click the **Create** button.

This is also where you'll see the details for each campaign you've created. To dig deeper, click the campaign name or the hyperlinked reporting numbers.

Dashboard

Marketing channels
- All campaigns
- Multi-channel campaigns
- Email
- Social posts
- SMS
- Automations
- Surveys

Audience growth

Contacts

Reporting

My brand

Email

+ Create an email

Status ⌄   Last modified ⌄   🔍 Search campaigns

Floral Craft of the Month
Draft · 📧 Email · Created Aug 4, 2022 at 3:44pm …   Edit ···

Flower Care Tips
Draft · 📧 Email · Created Apr 16, 2024 at 2:51pm …   Edit ···

Marigold Madness
Draft · 📧 Email · Created May 18, 2021 at 12:54p…   Edit ···

March Floral Craft of the Month
Sent · 📧 Email · Sent Mar 19, 2024 at 10:41am EDT

20 sends · 5 (42%) opens · 5 (42%) clicks · 0 (0%) bounces · 0 (0%) unsubscribes

Contacts & sign-up forms

You'll find and manage your contacts, [lists](#), [segments](#), and [tags](#) 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 by creating custom **segments** based on specific criteria, such as their engagement with your emails.

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

The **Audience growth** > **Sign-up forms** page is where you'll find all of our list-growth tools, including inline and pop-up sign-up forms, landing pages, and Facebook Lead Ads.

You can choose which contact details you want to collect from subscribers, such as their name, birthday, and more, as well as which email lists they want to be on. If you want to collect additional information, you can create custom fields. [See how](#).

Contacts

Discover improvements to help you manage your contacts in this [knowledge base article](#).

Lists | Segments `New` | Tags | Contacts

Insights

Subscribed ⓘ	New subscribers (30 days) ⓘ	Subscriber g...
2,463	**0** —	**0%** —

9 Lists

☐	★	List name ↑	Total contacts	Email
☐	☆	Floral Craft Club Members	2,443	2,443
☐	☆	General Interest	5	5
☐	☆	May Day Baskets	1	1

Navigation menu:
- 🔲 Dashboard
- ◎ Marketing channels ⌄
- ↗ Audience growth ⌃
  - Growth center
  - Landing pages
  - Lead magnet
  - Sign-up forms
  - Events
  - Ads
  - SEO
- 👥 Contacts ⌃
  - All contacts
 - Segments
  - **Lists**
  - Tags
- 📊 Reporting

Import your contacts

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:

- [Mailchimp](#)

- [Nutshell](#)

- [Google](#)

- [Microsoft Outlook](#)

- [Eventbrite](#)

- [File or spreadsheet](#)

Don't see your program or option here?

Check out the different ways you can add your contacts to Constant Contact.
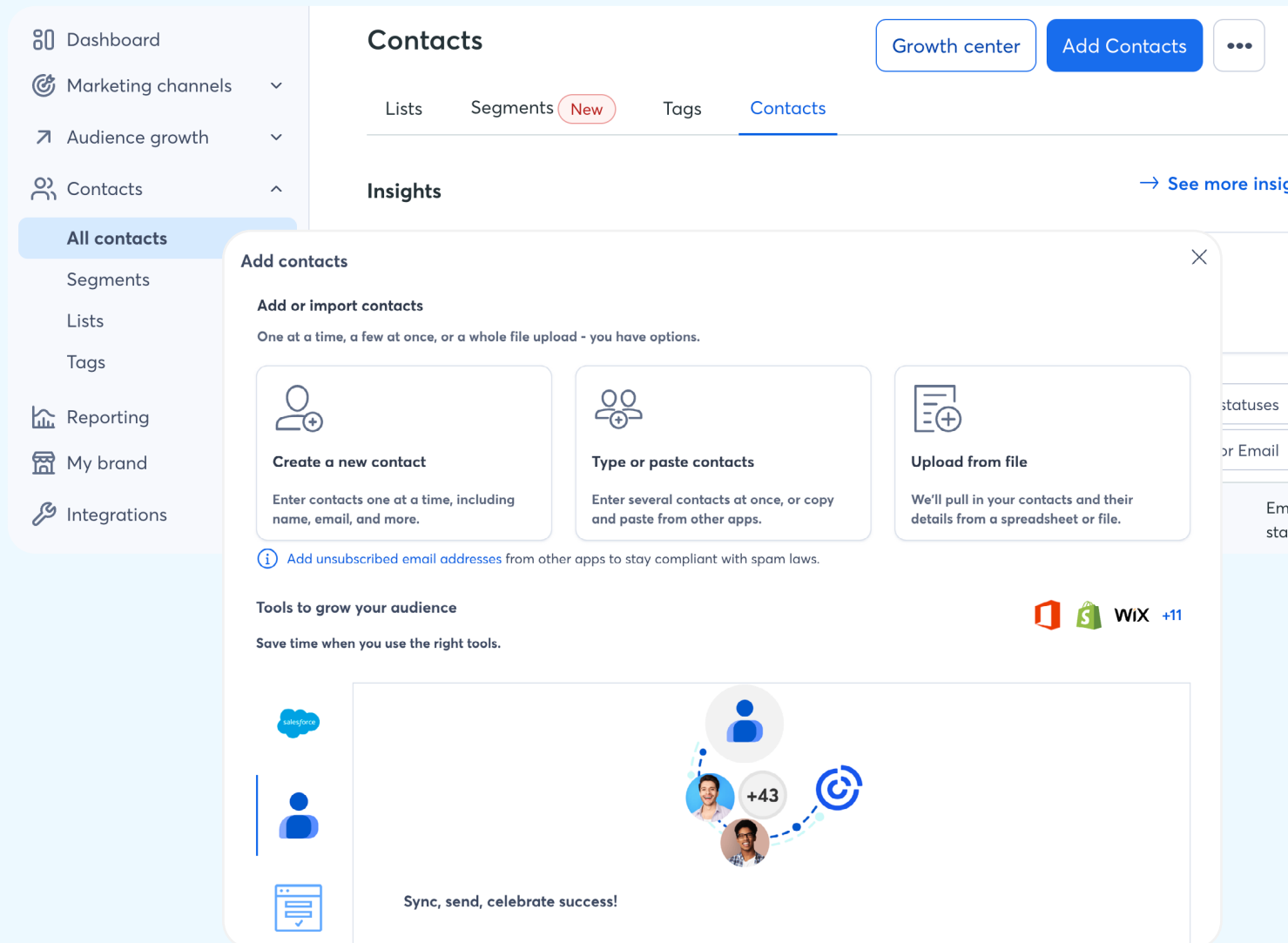
Need help? If you want some help importing your contacts, don't hesitate to contact Support!

Set up a sign-up form

To continue growing your contact list, Constant Contact has [several sign-up form options and other tools](#).

[Inline sign-up forms](#) can be embedded on a specific page of your website, while [pop-up](#), [banner](#), and [flyout](#) sign-up forms catch your website visitors' attention and displays after a designated amount of time or when someone goes to leave.

[Sign-up Landing Pages](#) are like standalone webpages that you can create and share the URL on your social media pages, in an ad, or anywhere online to capture new subscribers to a specific list.

You can create multiple sign-up forms and customize the content for specific audiences!
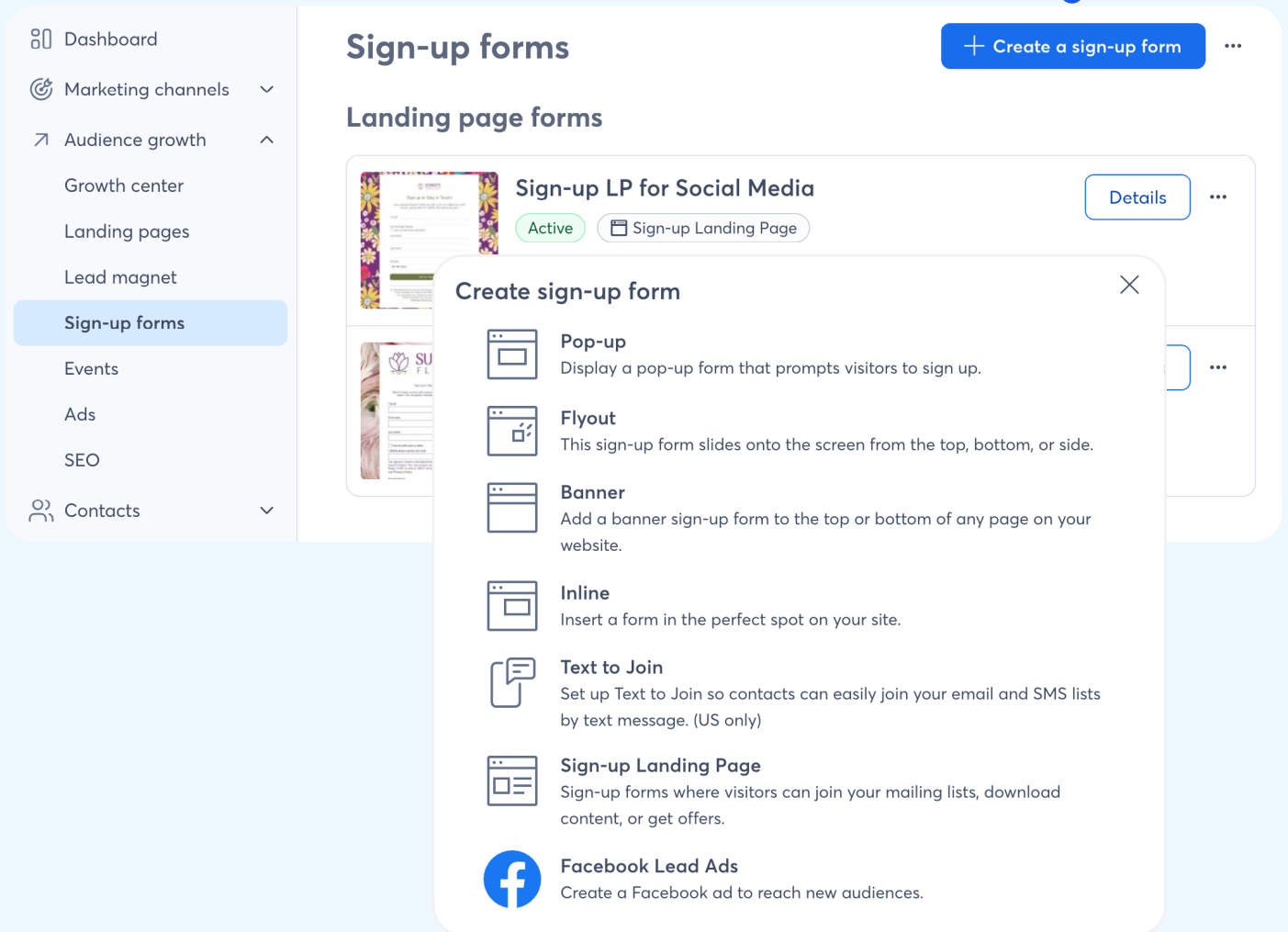
Next steps:

- [Set up a Welcome Email](#) that automatically sends to new contacts when they join your list.

- [Segment your contacts](#) to send more targeted emails.

Create your first Constant Contact email

With your contacts added and new subscribers coming in, let's create your first email!

Our drag-and-drop email editor makes designing a professional, beautiful campaign quick and easy. Simply pick a template, customize the design, and add your content.

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

- Add, arrange, or delete blocks in your email template
- Changing colors in your email template
- Send a test version of your email
- Schedule and send your email

More resources

Check out these additional resources to get up and running in your Constant Contact account! Our Support team is also here to help you work through any hurdle. Just visit our Help Center.

For even more how-to articles, video tutorials, and guides, visit our Knowledge Base.

Getting started with Constant Contact

Overview of Constant Contact's mobile app

Getting started with the Automation Path Builder

Automatically generate a marketing campaign based on your goals

Use the Content Generator