

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



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.

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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

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.

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 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**.

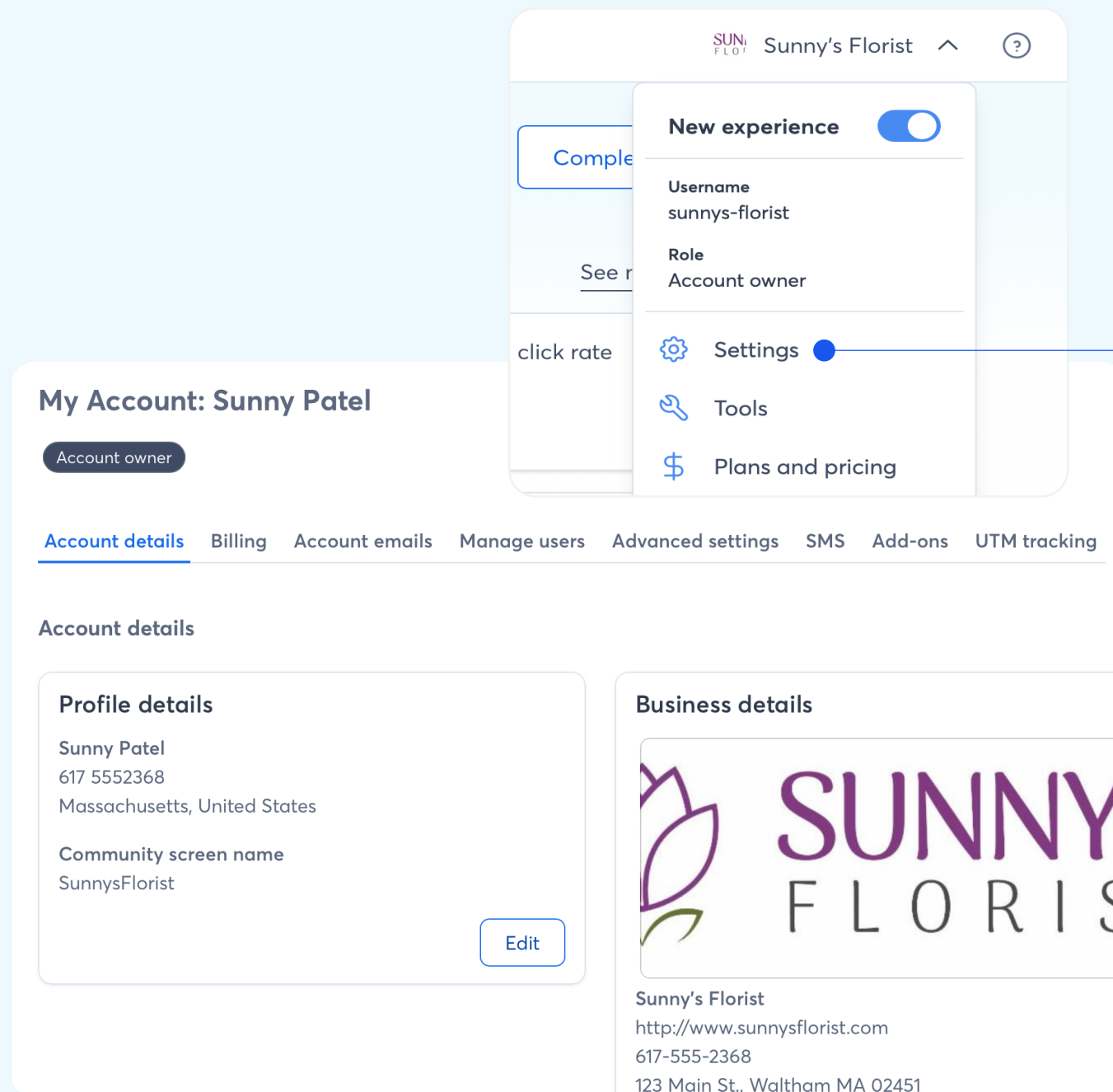
Account settings

To get started:

1. Click the profile name in the upper-right corner.
2. Select **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




The screenshot displays the 'My Account: Sunny Patel' page for 'Sunny's Florist'. A dropdown menu is open from the profile name in the top right, showing options: 'New experience' (toggle on), 'Username' (sunnys-florist), 'Role' (Account owner), 'Settings' (selected), 'Tools', and 'Plans and pricing'. The main page has a navigation bar with links: 'Account details' (active), 'Billing', 'Account emails', 'Manage users', 'Advanced settings', 'SMS', 'Add-ons', and 'UTM tracking'. The 'Account details' section is divided into 'Profile details' and 'Business details'. 'Profile details' shows 'Sunny Patel', phone '617 5552368', location 'Massachusetts, United States', and 'Community screen name' 'SunnysFlorist', with an 'Edit' button. 'Business details' shows the 'SUNNY FLORIST' logo and contact information: 'Sunny's Florist', 'http://www.sunnysflorist.com', '617-555-2368', and '123 Main St., Waltham MA 02451'.

My Account: Sunny Patel
Account owner

[Account details](#) Billing Account emails Manage users Advanced settings SMS Add-ons UTM tracking

Account details

Profile details
Sunny Patel
617 5552368
Massachusetts, United States
Community screen name
SunnysFlorist
[Edit](#)

Business details
 **SUNNY FLORIST**
Sunny's Florist
<http://www.sunnysflorist.com>
617-555-2368
123 Main St., Waltham MA 02451

Marketing campaigns

You'll find all your campaigns on the **Campaigns** page. These can be standard or automated emails, SMS messages, social posts, ads, events, surveys, or landing pages.

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

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.

Create

Dashboard

Campaigns

Contacts

Channels

Emails

Social

SMS

Events

Landing pages

Sign-up forms

Audience

Assets

Reporting

Automations

Campaigns

Settings

Create a campaign

Single-channelMulti-channelNewCalendar view

CampaignsStatusLast modifiedFoldersSearch campaigns

Flower Care Tips

DraftEmailCreated Apr 16, 2024 at 2:51pm ...

Edit

Spring Floral Craft Club

ActiveCustom Landing PageActivated May 15, 2...
0 total visits • 0 (0%) engagement • 0 contact visits • 0 visitor...

Details

Don't forget to register for our Sprin...

DraftSocial PostCreated Jul 13, 2023 at 2:41pm EDT

Edit

SUNNY'S FLORIST

March Floral Craft of the Month

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

Sent

Email

Sent Mar 19, 2024 at 10:41am EDT

Contacts & sign-up forms

You'll find and manage your contacts, [lists](#), [segments](#), and [tags](#) under the **Contacts** and **Lists and segments** pages.

A **My Contacts** 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.

Lists and segments

Lists and segments are groups that help you organize your contacts. Try a segment that updates contacts automatically based on set criteria, or create a list manually. [Learn more.](#)

Your lists 9

Search by list name

All list types

<input type="checkbox"/>	☆	Name ↑	Contacts	List type	Date created
<input type="checkbox"/>	☆	Floral Craft Club Members	43	List	Jan 29, 2020
<input type="checkbox"/>	☆	My Contacts	5	List	Feb 17, 2017
<input type="checkbox"/>	☆	May Day Baskets	1	Segment	Jan 29, 2020
<input type="checkbox"/>	☆	Memorial florals	0	List	Jan 29, 2020
<input type="checkbox"/>	☆	Social Media Sign-ups	0	List	Jan 29, 2020
<input type="checkbox"/>	☆	Wedding Planners	0	List	Aug 3, 2021

The **Channels > 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.](#)

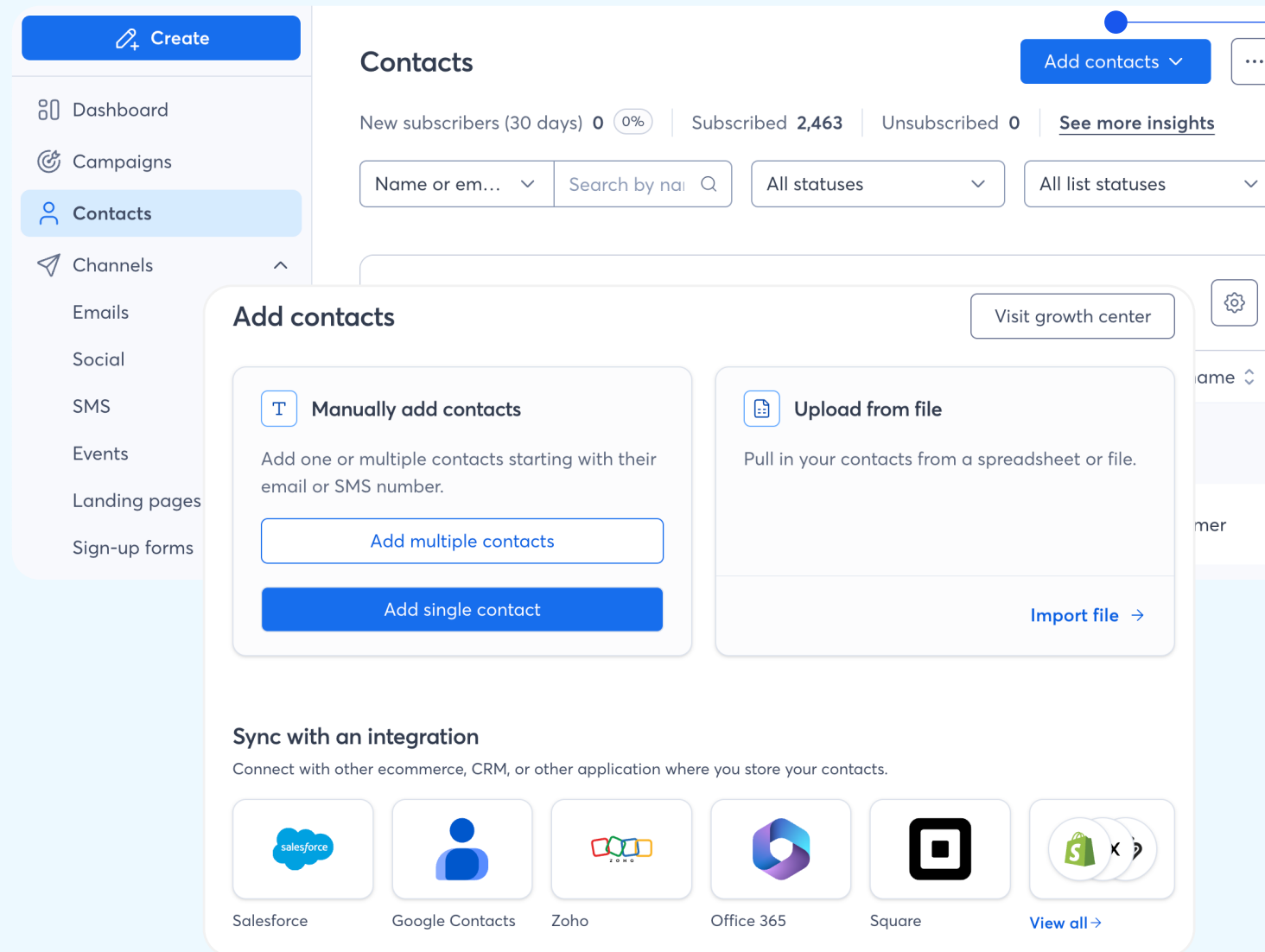
Import your contacts

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.



The screenshot displays the Constant Contact 'Add contacts' interface. On the left is a sidebar with navigation options: Dashboard, Campaigns, Contacts (highlighted), Channels, Emails, Social, SMS, Events, Landing pages, and Sign-up forms. The main content area is titled 'Contacts' and shows statistics: 'New subscribers (30 days) 0 0%', 'Subscribed 2,463', and 'Unsubscribed 0'. There are filters for 'Name or email', 'Search by name', 'All statuses', and 'All list statuses'. A 'Create' button is at the top left, and an 'Add contacts' button is at the top right. The 'Add contacts' modal is open, showing two main options: 'Manually add contacts' (with sub-options 'Add multiple contacts' and 'Add single contact') and 'Upload from file' (with an 'Import file' button). Below these is a 'Sync with an integration' section with icons for Salesforce, Google Contacts, Zoho, Office 365, and Square, followed by a 'View all' link.



Need help? If you want some help importing your contacts, don't hesitate to [contact Support!](#)

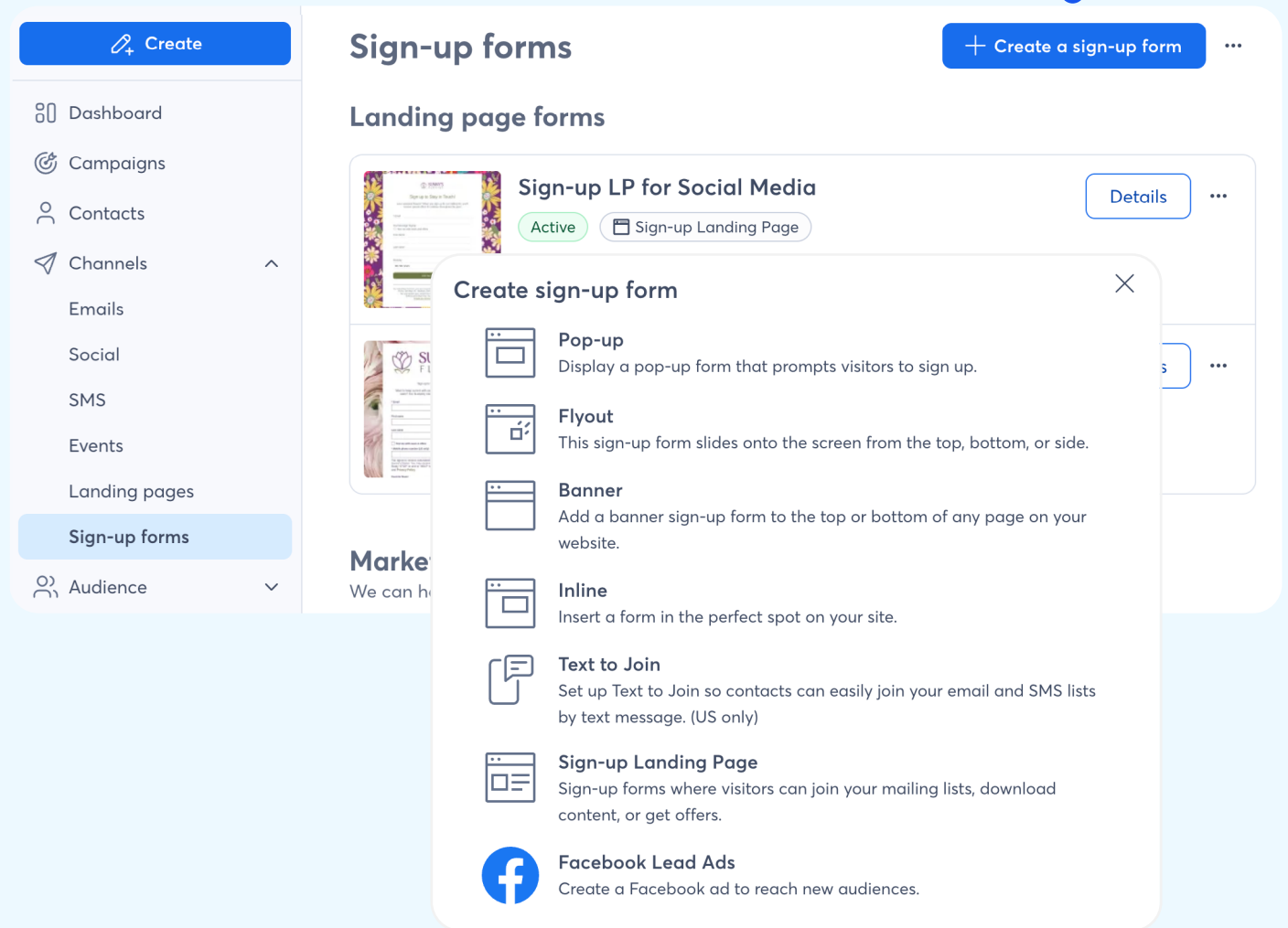
Set up a sign-up form

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](#)

Floral Craft of the Month

✓ Saved ← Undo → Redo Preview & Test Continue

Build Images Design

Blocks

Text

Image

Button

Divider

Spacer

Social share

Social follow

Video

Read more

Data table

Event

Feedback


RSVP


Product

Layouts

Heading

Section heading





SUNNY'S FLORIST

Spring is finally here and it's time for another meeting of our Floral Craft of the Month Club!

- **When:** 2nd Wednesday of the month
- **Time:** 6:30pm
- **Location:** Sunny's on Main St.

Light snacks will be provided - bring your own wine!




RSVP

Nothing screams March like daffodils! This month's project involves a teeny bit of painting, a little bit of ribbon, a whole lot of fun, and we'll even throw in a couple of crocuses for contrast!

\$49.00 (Pay at the door.)

See details

Stay Connected





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](#).

[Was this guide helpful?](#)

[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](#)