

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

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

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](#)

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 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 shows the 'My Account' page for 'Sunny's Florist'. At the top, there's a header with the account name 'SUNNY FLOR' and 'Sunny's Florist' with a dropdown arrow. A help icon (circle with a question mark) is also present. Below the header, a sidebar on the right contains account settings: 'New experience' (switched on), 'Username' (sunnys-florist), 'Role' (Account owner), 'click rate' (with a gear icon), 'Tools' (with a wrench icon), and 'Plans and pricing' (with a dollar sign icon). The main content area is titled 'My Account: Sunny Patel' and shows the user is an 'Account owner'. Below this, a navigation bar includes 'Account details' (which is underlined in blue), 'Billing', 'Account emails', 'Manage users', 'Advanced settings', 'SMS', 'Add-ons', and 'UTM tracking'. The 'Account details' section is expanded, showing 'Profile details' for 'Sunny Patel' (617 5552368, Massachusetts, United States) and 'Community screen name' (SunnysFlorist) with an 'Edit' button. The 'Business details' section shows the logo for 'SUNNY FLORIST' and the account information: 'Sunny's Florist', 'http://www.sunnysflorist.com', '617-555-2368', and '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.

Campaigns

Single-channel Multi-channel **New** Calendar view

Campaigns Status Last modified Folders Search campaigns

Flower Care Tips
Draft Email • Created Apr 16, 2024 at 2:51pm ...
Edit ...

Spring Floral Craft Club
Active Custom Landing Page • Activated May 15, 2...
0 total visits • 0 (0%) engagement • 0 contact visits • 0 visitor...
Details ...

Don't forget to register for our Sprin...
Draft Facebook Social Post • Created Jul 13, 2023 at 2:41pm EDT
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

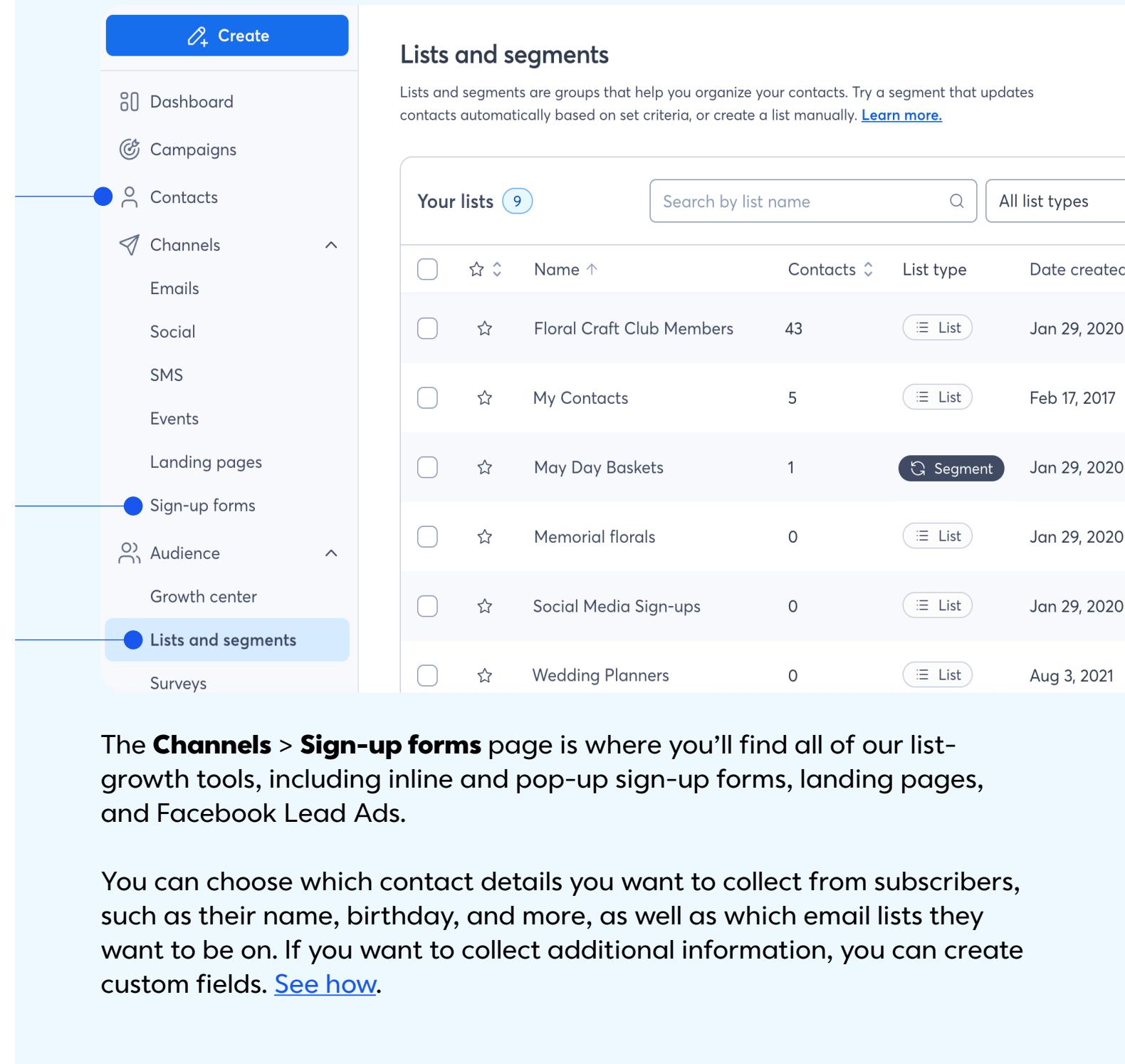
You'll find and manage your contacts, [lists](#), [segments](#), and [tags](#) under the **Contacts** and **Lists and segments** pages.

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.



The screenshot shows the Mailchimp interface. On the left, a sidebar menu is open with the following structure:

- Create** (button)
- Dashboard
- Campaigns
- Contacts** (selected, indicated by a blue dot)
- Channels** (selected, indicated by a blue dot)

 - Emails
 - Social
 - SMS
 - Events
 - Landing pages

- Sign-up forms** (selected, indicated by a blue dot)
- Audience** (selected, indicated by a blue dot)

 - Growth center

- Lists and segments** (selected, indicated by a blue dot)
- Surveys

The main content area is titled "Lists and segments". It contains the following text and a table:

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	
	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.

Contacts

New subscribers (30 days) 0 (0%) | Subscribed 2,463 | Unsubscribed 0 | [See more insights](#)

Name or em... | Search by na... | All statuses | All list statuses

[Visit growth center](#)

[Add contacts](#)

[Manually add contacts](#)

Add one or multiple contacts starting with their email or SMS number.

[Add multiple contacts](#)

[Add single contact](#)

[Upload from file](#)

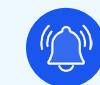
Pull in your contacts from a spreadsheet or file.

[Import file →](#)

[Sync with an integration](#)

Connect with other ecommerce, CRM, or other application where you store your contacts.

Salesforce | Google Contacts | Zoho | Office 365 | Square | [View all →](#)



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!



The screenshot shows the Constant Contact dashboard with a sidebar on the left containing links for Dashboard, Campaigns, Contacts, Channels, Emails, Social, SMS, Events, Landing pages, and Sign-up forms (which is highlighted). The main content area is titled 'Sign-up forms' and shows a section for 'Landing page forms'. It features a preview of a 'Sign-up LP for Social Media' form, which is active and a sign-up landing page. Below this, a modal window titled 'Create sign-up form' lists seven options: Pop-up, Flyout, Banner, Inline, Text to Join, Sign-up Landing Page, and Facebook Lead Ads. Each option has a description and a small icon.

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 <small>(New)</small>
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