

Sorrell Associates Customized Newsletter Service

www.NewsletterVille.com ~ 740-824-4842

Exporting your contacts to Constant Contact.

➤ **From ACT.**

Create a group. (Call it E-Newsletters or something like that)

Add contacts to the group and save.

➤ **To import your contacts from ACT! (.CSV file), please follow these simple steps:**

1. From the **File** menu in ACT!, select **Data Exchange > Export**. This will take you to the Export Wizard.
2. From the File type drop-down list, select **Text-Delimited** (default choice). Click on the "..." next to the **Filename and location** box.
3. At the top, in the **Save in** pull-down menu, select the directory where you want to place the exported file. For file name, type in a **file name** and add CSV at the end (ex: mycontactlist.csv). The **Save as type** pull-down menu should display **Text - Delimited (*.CSV)**. Then click **Next**.
4. Select **Contact records** only. Click the **Options** button on the right side of the window to view **Export Options**. Set the field separator to comma. Click the box to select **Yes, export field names**. Then click **OK**.
5. Click **Next** in the Export Wizard.
6. Click **All records** and click **Next**.
7. Remove all fields that you do not wish to export into Constant Contact.
8. Click **Finish**. The new text file should be now be in the location that you indicated.

Your .CSV file is now ready to into Constant Contact.

➤ **If you are using ACT 2006, follow the steps below instead:**

1. Click the **File** menu, and then click **Export**. The Export Wizard will display.
2. If desired, enable the "Check to hide in the future" option and click **Next**. The **Specify Destination** dialog box appears.
3. Ensure that **Text Delimited** displays in the "What type of file do you want to export to?" field.

4. Click the **Browse** button at the **Filename and location** field. An Open dialog box appears.
5. Enter a name into the **File Name** field and select Comma Separated Values (*.CSV) in the **Save as type** field. If necessary, browse the **Look in** field for the location you want to save the file and then click **Open**. The **Specify Destination** dialog re-appears.
6. Click **Next** to proceed to the **Specify record type(s)** dialog.
7. Select **Contact records**.
8. Enable the appropriate "Which records do you want to export?" option:
 - a. Enabling **Current Record** is the contact record currently viewable in the ACT! Contact Detail screen.
 - b. Enabling **Current Lookup** is the current list of contacts displayed under the Contact List.
 - c. Enabling **All Records** will export all records of the selected type (Contact, Group or Company) in the Database.
9. Click **Next** to proceed to the **Specify export options** dialog.
10. Enable either the **Comma** or **Tab** options in the **Select field separator** section. If you would like to export field names, enable the **Yes, export field names option**, and then click **Next**. The Contact, Group, or Company Map appears, based on the option you selected in step number 7.

➤ **How do I import a list of subscriber email addresses?**

Answer:

Importing a file is one of several ways to add email addresses to your subscriber list. Choose this option if your subscriber data is in an electronic format that can be imported into Constant Contact.

To import an email list to your Constant Contact account:

1. Click the **Subscribers & List** tab.
2. Select the "Add/Import" option on the "Manage Subscribers" page that displays.
3. Select an interest category.
4. Select the "Import my list from a file on my computer" and click **Next**.
5. Click the **Browse** button and locate the file on your computer.
6. Click the **Submit Data** button.
7. Read, check off requirements, and **Submit** the Permission Checklist.

If you are importing subscriber details along with your email addresses, follow these additional steps:

8. Verify the data labels for your details. Example: Select the "First Name" heading when you see Greg and Mary listed below the data label drop-down box.
9. Check for importing errors on the "Activity" screen. There you can monitor the progress of your import, as well as see any errors that occurred during the process.

Notes:

- Before importing, make sure .CSV, .TXT, and .XLS files are correctly formatted.
- If you are importing more than 100 email addresses, your request is also sent to the "Activity" screen for complete processing. See Step 9.

➤ **From Outlook**

How do I export contacts from MS Outlook to Constant Contact?

Answer:

If you maintain your subscriber list in Outlook and would like to upload it to Constant Contact, you have two options. You can export the file from Outlook and import it into Constant Contact or use QuickImport to upload the contact directly into your subscriber list.

File Export

File formats compatible with Constant Contact are .CSV and .XLS.

1. From the Outlook main menu, select **File > Import and Export**. The Outlook "Import and Export" Wizard displays.
2. Select **Export to a file** and then click **Next**.
3. Select **Comma Separated Values (Windows)** and then click **Next**.
4. Choose to export from the **Contacts** folder and then click **Next**.

Note: If you have your email addresses in an Outlook Personal Address Book, first convert your email Personal Address Book to a Contacts folder. See your Outlook online help for more information.

5. Type a file name (ex: "mycontactlist") and click **Browse** to locate the directory where you want to place the exported file. Then click **OK** to close the "Browse" dialog box.
6. Click **Next**, and then **Finish**. The new CSV file should now be in the location that you indicated.

7. (Optional) Prepare your list. If you only want email addresses and subscriber names, remember to open the file in MS Excel and strip the list of any extra information that may have been exported.
8. Save and import into Constant Contact.

➤ **QuickImport for Outlook**

The basic steps for using QuickImport are as follows.

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1. Click the Constant Contact QuickImport button on your Outlook toolbar and select how you want to select the contacts.

Note: You must have installed QuickImport first.

2. Log into the wizard with your Constant Contact user name and password.
3. Choose the upload type, add new contacts or update existing subscribers.
4. Select interest categories. If you upload multiple contact folders, select interest categories for each.
5. (Optional) Map additional contact fields from Outlook to Constant Contact.
6. Review your selections in the wizard and click **Finish**. Your Outlook contacts are uploaded to your Constant Contact subscriber list.

Note: This feature is not available for customers accessing Constant Contact from AOL, WebsitePros, and Interland.

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