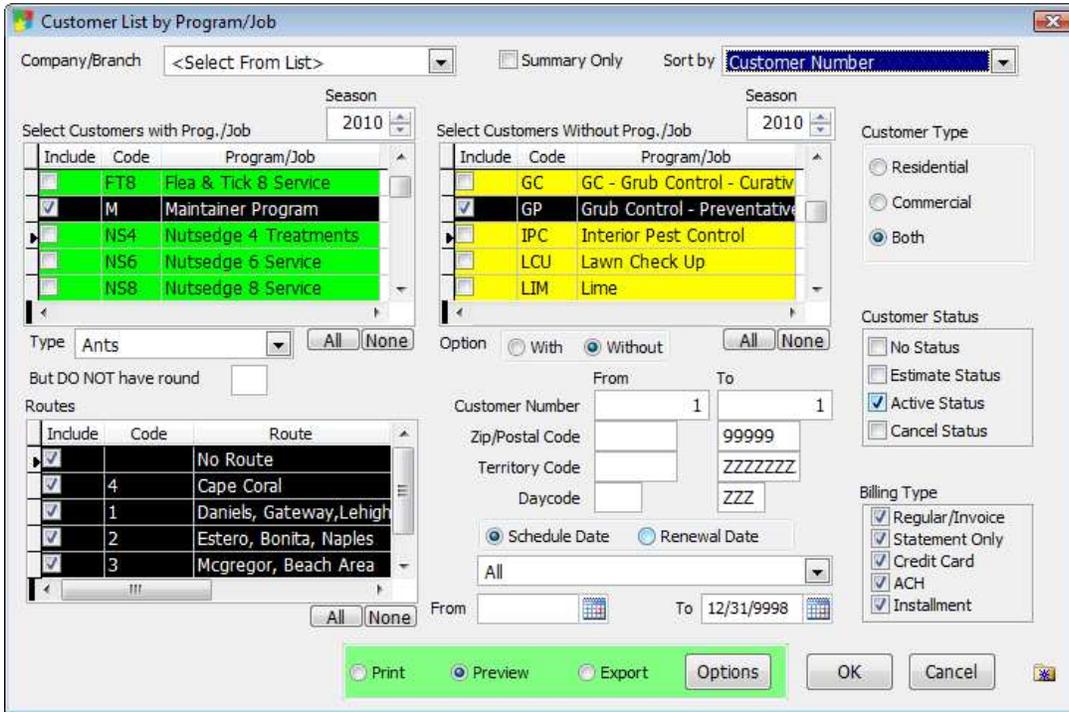


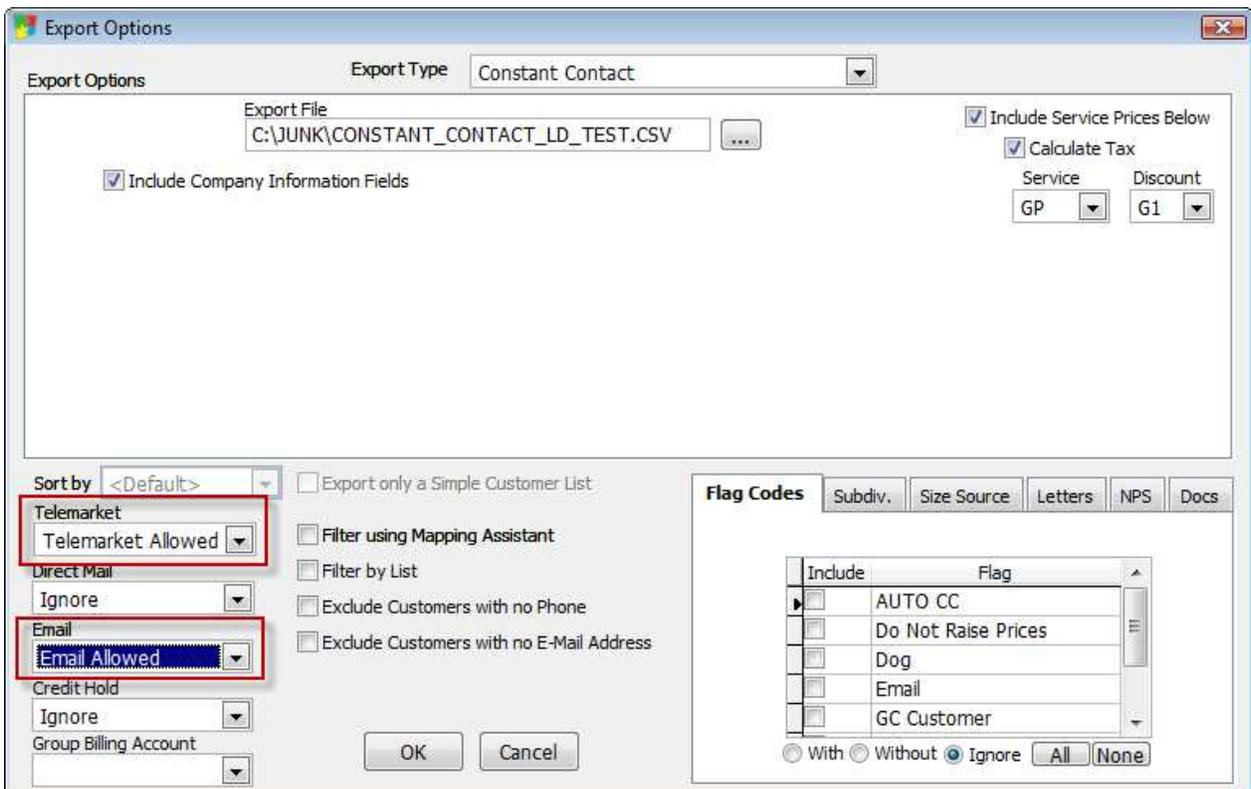
Constant Contact Instructions

These Instructions use an upsell scenario. The process is the same except for the report you will run in Service Assistant.

1. In Service Assistant, run the customer list by program job report.



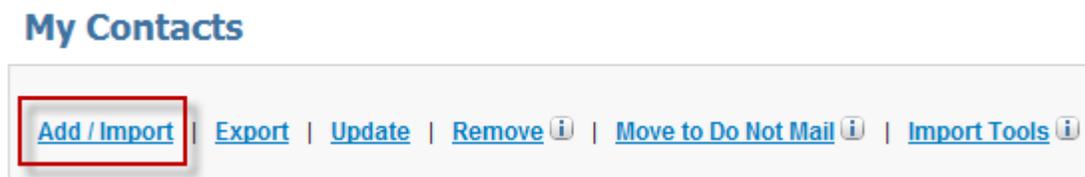
2. Preview the report to make sure you are getting the correct customers
3. Click on Export option in the green box - **If you are creating a list to send out a general email with no pricing information, you DO NOT have to select include service price, calculate tax, service or discount options.**



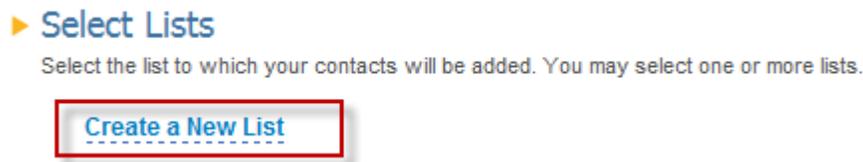
4. Export Type: Select Constant Contact
5. Export File: Hit the Browse button (button with three dots) and select the path and name the export file.
 - a. This will create a special file formatted correctly to easily import into Constant Contact.
6. Click the OK button on the export window
7. Click the OK button on the report window to export the data to the file.
8. Logon to your constant contact account
9. Click on the Contact icon



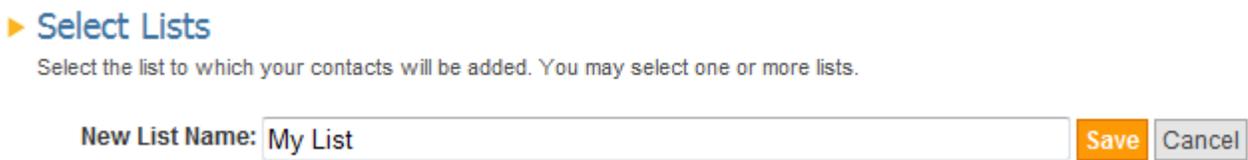
10. Click on Add/Import option



11. Click on Create a New List option



12. Give your List a name and Hit the Save button



13. Hit the Next Button



14. Select the Import Contacts from a File option and hit Next

► How would you like to add your list?

Select the method you would like to use for adding your list.

 Be advised, your account is subject to the terms in our zero tolerance [Anti-Spam Policy](#).

- Copy and Paste Contacts** 
Type or copy and paste my email addresses into Constant Contact
- Add Individual Contacts** 
Type my email addresses and contact details into Constant Contact
- Import Contacts from a file**  
Import my list from a file on my computer
- Import Contacts from a webmail account** 
Import contacts from Gmail or Google Contacts

Download our easy-to-use [import tools](#) to add/update contacts.

15. Specify File Location - Hit the browse button and browse to the csv file you exported from Service Assistant.

► Specify File Location

You can upload your file here. File formats acceptable for uploading are Excel (.xls,.xlsx) and Comma Separated Value (.csv) and Text (.txt), with one email address per line. We recommend [reading the instructions](#) prior to uploading your file.

File to Upload
(.txt, .csv, .xls, .xlsx)

16. Click on the Submit Data button



17. Check all the boxes on the Permission Confirmation Checklist window and hit Submit button

Permission Confirmation Checklist

Only contacts that have given you or your business prior consent to receive communications can be used in Constant Contact. If your list does not meet each condition on the checklist below, select **Cancel**. **All boxes must be checked before your import can begin.**

- My list is consent based** - All contacts have given me or my business their prior consent to receive email communications.
- My list is NOT a third party list** - My list has not been purchased, rented, appended or given to me from any third party source.
- My list does NOT contain role addresses or distribution lists** - E.g. email addresses that may be received by more than one individual: sales@, support@, users@, list@, etc.
- My list does NOT contain email addresses** captured in my address book without prior consent. Including but not limited to: user group addresses, transactional addresses or auto-response addresses.

Violation of these rules will make you subject to our [Anti-Spam Policy](#) and may result in the immediate termination of your account. Please contact Customer Support with questions.

18. Confirmation Page will display. The special file created from Service Assistant automatically maps the fields during the import process for you. If an field mapping page displays, you did not use the Export to Constant Contact export type.

Contacts : Import in Progress

✓ **Congratulations!**

Your import has begun. Typically, lists are imported within 10 minutes. However, some larger lists may take up to 2 hours.

Please visit [Contacts](#) to see the additions to your lists.

You may also want to visit the [Activity](#) screen for a status of your import and error reports, if any.

19. Click on the Activity link in the above message to check on the status of your list import.

20. Click on the Email Marketing Option at top of the page



21. Select Email to send. THIS ASSUMES YOU ALREADY HAVE AN EMAIL CREATED.

Existing Emails

Edit		Copy	Email Name	Status	See all	Date
			MobileAssistant2.0	Sent		6/4/2010
			Email Test	Draft		5/27/2010

22. List Selection - Click on Select Lists link

Email Details

▶ Email Test

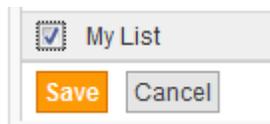
[Edit Email](#) | [Edit Message Settings/Header](#) | [Edit Name](#)

Status: **Draft**

Template: Promotions - My Image I

List Selection: [Select Lists](#)

23. Select the List to send the email by checking the box next to the list you imported. Then hit the Save button.



24. You will now see that a List has been selected for this email and is ready to be scheduled.

Email Details

▶ Email Test

Preview

[Edit Email](#) | [Edit Message Settings/Header](#) | [Edit Name](#)

Status: **Draft**

Template: Promotions - My Image I

List Selection: [Edit Selections](#)

My List

Delivery Date: [Schedule Email](#)

25. Preview the email to verify its accuracy by clicking the Preview button.

26. Schedule the email to send by clicking on the Schedule Email link. Select the appropriate delivery option and hit the Save Button

Email Status

Important : Emails typically begin sending within 1 hour of the time you selected.

Select Status

Draft [i](#)

Send Now [i](#)

Scheduled for [i](#)

Date: [i](#)

Time: EDT (US Eastern Time)

Email Archive

Archive this email once it's been sent.

Email Archive Link: <http://archive.constantcontact.com/fs081/1103080519845/archive/1103441916492.html>

This link won't be active until the email is sent. Usually archive pages are available within 10 minutes of when the email is sent, but it can take as long as 1 hour.

[+](#) SHARE [t](#) [f](#) Add the Share button to this email's footer. [i](#)

Save

Cancel

A confirmation page will be displayed if the email was scheduled as you requested.

✓ **Success—Your email has been scheduled.**

[◀ Back](#)

Email Details

▶ Email Test

You cannot edit an email you've already scheduled for delivery. To edit this email, you must [reset it to draft status](#).

Status: **Scheduled**

Template: Promotions - My Image I

List Selection: My List

Delivery Date: Thursday, July 1, 2010 at 4:30 PM EDT
[Edit Date](#)

Service Assistant - Constant Contact Export File Information

Constant Contact Field Name	Data
Email Address	Email Address
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Address line 1	Address line 1
Address line 2	Address line 2
Address line 3	Address line 3
City	City
US State/CA Province	US State/CA Province
Other State/Province	Other State/Province
Zip/Postal Code	Zip/Postal Code
Sub Zip/Postal Code	Sub Zip/Postal Code
Country	Country
Home Phone	Home Phone
Company name	Company name
Work Phone	Work Phone
Job Title	Job Title
Custom field 1	Customer Number
Custom field 2	Company Name
Custom field 3	Company Address 1
Custom field 4	Company Address 2
Custom field 5	Company Address3
Custom field 6	Company Phone 1
Custom field 7	Company Phone 2
Custom field 8	Company URL
Custom field 9	Service Name
Custom field 10	Service Code
Custom field 11	Service Price
Custom field 12	Service Discount
Custom field 13	Service Discounted Price
Custom field 14	Service Tax
Custom field 15	Service Price with Tax