

Constant Contact Email Export

Introduction

SofterWare has partnered with Constant Contact © to provide an easy and affordable way to expand and market to your email database of website visitors and donors. You can use this service to create and send HTML email newsletters, solicitations and constituent alerts, to collect email addresses at your website, to manage your email lists, and to measure the success of your email marketing campaigns. No particular technical expertise is required; nor do you need a graphic artist to significantly improve the professionalism of your email communications.

One of the best aspects of this collaboration is the ease with which DonorPerfect integrates with Constant Contact's functionality and email list management. With the use of an export template specifically defined to meet the requirements of the Constant Contact interface and the DonorPerfect Export to File functions, uploading your email lists to Constant Contact becomes a simple and straightforward part of your ongoing DonorPerfect processes.

Constant Contact Export Template

When combined with the Constant Contact Export Template, the Export to File (csv) function (found on the Listings and Mailings screen at Reports + Listings or Mailings + Mailmerge) provides an extremely easy way to export the information required by the Constant Contact interface.

The default Constant Contact Export Template, as shown below in Figure 1, specifies the basic set of data fields from your DonorPerfect database that must be included in the export to Constant Contact. In addition, you can easily add fields to the export file by inserting them in the export template, as discussed below.

Note that the check mark in the **Email Type Template** checkbox causes DonorPerfect to insert the email address as the first field in the export file and to insure that only those donor records having email addresses will be included. No additional filtering is required for this purpose.

► To add fields to the Constant Contact export template

1. Click on **Mailings**  + **Export Templates** to open the list of existing export templates.
2. Select the “Constant Contact” export template and click **Edit Template** to open the Export Templates...Add/Edit Template screen as shown below in Figure 1.

Since you are modifying the basic Constant Contact Export Template, it is a good idea to save this new template under a different name; e.g., “Constant Contact 2.” Thus, you should enter such a name in the **Template Name** field.

3. When finished adding fields, click **Save & Close** to return to the export template list screen.
4. Click **Done** to close the export template list.

Refer to the “Managing Export Templates” section of the *DonorPerfect User Guide* for more information on creating export templates.

Recreating the Default Constant Contact Export Template

The Setup Constant Contact screen at **Modules**  + **Constant Contact** provides a very simple way for you to recreate the default export template that matches the standard format accepted by Constant Contact.

► **To recreate an export template to match the Constant Contact default**

1. Click **Modules**  + **Constant Contact** to open the Setup Constant Contact as shown below in Figure 2.

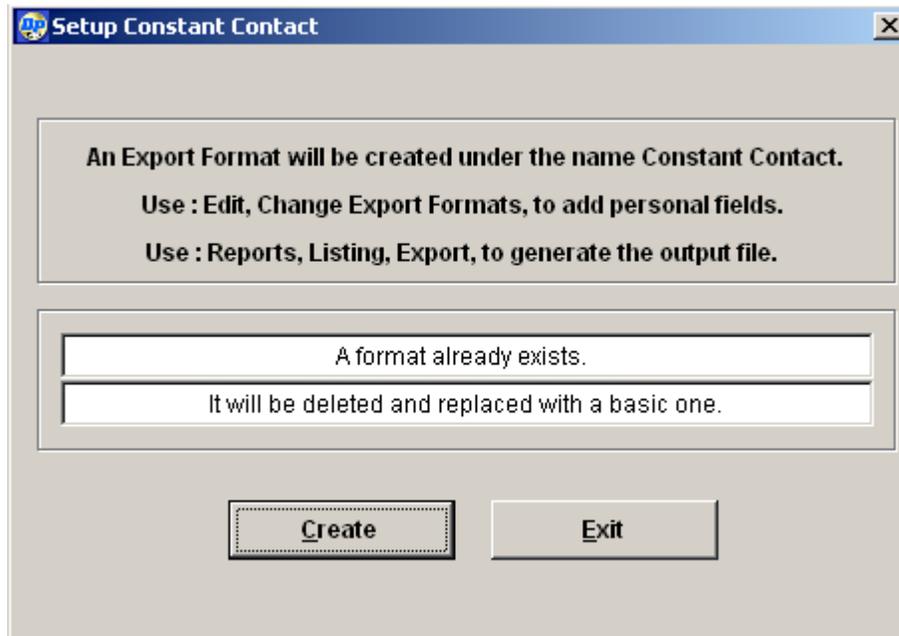


Figure 2. Setup Constant Contact Screen

2. Click **Create**. If there is no existing export template named “Constant Contact,” the system will create one that matches the default format accepted by Constant Contact.

If there is already an export template named “Constant Contact,” the system will display a message asking you to confirm the deletion of the existing template. Click **Yes**. The existing template will be deleted and replaced with the default.

3. Click **Exit** to close the Setup Constant Contact screen.

Creating the Constant Contact Email Export File

Once you have the appropriate export template, your next step is to create the export file. You will set up the export function to produce the file and to save it with the name that you specify. If you don’t specify an alternate path, the export file will be saved in the DonorPerfect program directory (usually C:\DPW32).

► **To create the Constant Contact email export file**

1. Click **Reports**  + **Listings** (or **Mailings**  + **Mailmerge**) to open the Listings and Mailings screen.

Select “Export to File (csv)” in **Report Category** area **1** and “Main/Bio” in **Select Export Type** area **2** to open the **Set Report Options** area **3** as shown below in Figure 3.

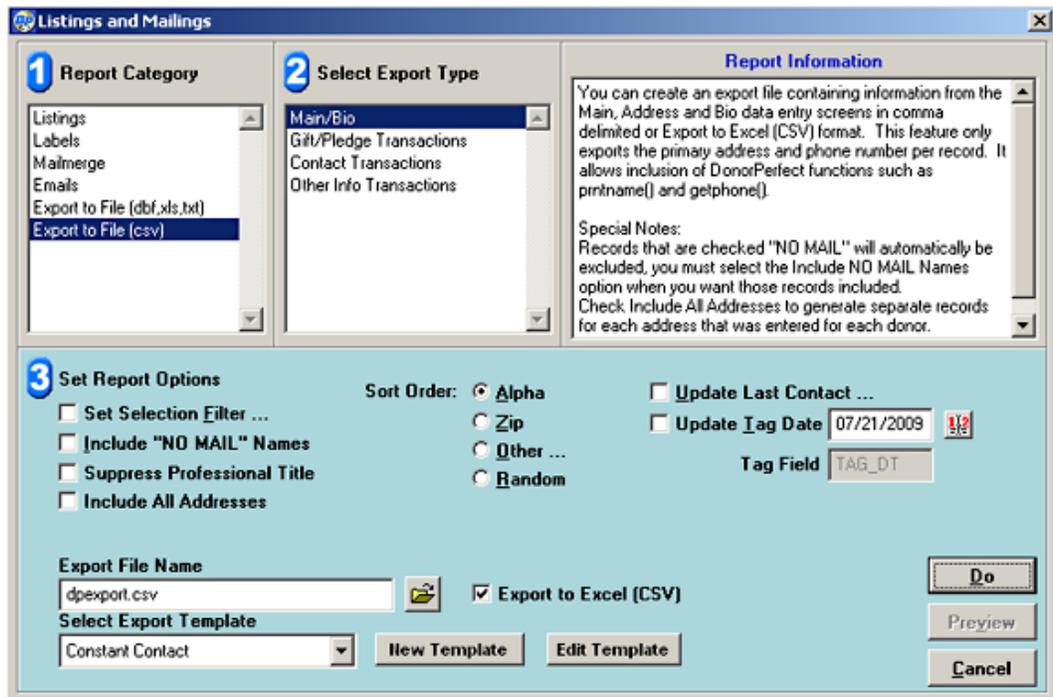


Figure 3. Constant Contact Email Export Setup

The system will enter the default name of “dpexport.csv” in the **Export File Name** field. If you want to override the default, insert the new file name or use the **Open File** icon  to navigate to the file to be exported.

Select “Constant Contact” or the name of the export file that you customized, if appropriate, in the **Select Export Template** pull-down menu. If necessary, use the **Edit Template** button to open the selected export file definition for editing.

Set the **Export to Excel (csv)** check box to produce an export file in the .csv format. If the **Export to Excel (csv)** check box is not set, the export will be in the .txt format. Constant Contact can accept email export files in any of three formats: csv, txt or xls.

Do **not** select **Include All Addresses**; otherwise the export file will include duplicate email entries.

Complete the other report option fields as necessary. For example, if you want to include only a subset of your constituent database in this export, use the **Set Selection Filter** function to choose an existing filter or build a new one to select the target subset.

2. Click **Do**. The system will create and save the export file as specified in the export template and report options and then display a message stating the number of email addresses included in the file.

Figure 4 below shows an example of a Constant Contact email export file as displayed in Microsoft Excel.

Note that the first record (row) in the export file contains the field labels that were specified in the export template.

Note also that there is one record (row) for each email address. If a donor’s record has more than one email address, as we see below for Roger Sandstone, there will be an export file record for each such address.

	A	B	C	D	E	F	G	H	I	J	K	L	M	
1	Email	First Name	Last Name	Job Title	Company	Company	Work Pho	Home Phc	Address	Li	City	State	Zip	count
2	support@adamsmckinley.com	Andrew	Lockley	CEO	Adams Mc	Adams Mc	(215)622-8377		477 W. Vir	Philadelph	PA		19011	
3	jackland@hotmail.com	Bill	Murphy	CEO, Chai	Comcast C	Comcast Cable			1200 Willc	Willow Gr	PA		19056	
4	jake@yahoo.com	Jacob	Dotsaur					(713)878-5205	72nc	Byron Cer	TX		78315	
5	ec3465@yahoo.com	Bill	Ford	Senior Grc	Ford Foun	Ford Foundation			2800 Engir	Detroit	MI		76031	
6	Fred@Garven.com	Fred	Garvin					(215)352-5123	(212)354-1231	Mary New	York NY		20002-5335	
7	cramer234@yahoo.com	Brian	Hans						42 Swift R	Orlando	FL		21056	
8	dpsupp@aol.com	Edward	Hobart						3335 Perry	San Diego	CA		92166	
9	dunn@hotmail.com	Jon	Humphrey						342 Windi	Los Angeli	CA		76742	
10	bh@excite.com	Dan	Mayer						6878 Old F	Billings	MT		57664	
11	jf23@excite.com	Paul	Thomas		Methactoi	Methacton High School			1020 Plym	Methactoi	PA		19310	
12	heartbreaker@aol.com	James	Miller						112 Fairvir	Brooklyn	NY		7417	
13	mayer1223@excite.com	Dave	Polk						653 Ice Ro	Trenton	NJ		45302	
14	glemonde@procylingfn.com	Le	Monde	Executive	Pro Cyclin	The Pro C	(731)555-5555		1952 Faus	Bulls Gap	TN		37711	
15	marys@sandstone.com	Roger	Sandstone				(215)628-5252	(215)628-5252	N. Ac	Philadelph	PA		19115-3309	
16	rsandstone@donorperfe.com	Roger	Sandstone				(215)628-5252	(215)628-5252	N. Ac	Philadelph	PA		19115-3309	
17	info@donorperfect.com	Roger	Sandstone				(215)628-5252	(215)628-5252	N. Ac	Philadelph	PA		19115-3309	

Figure 4. Constant Contact Email Address Export File in Excel



Note: You can use the Export to File (dbf,xls,txt) function at **Reports + Listings** or **Mailings + Mailmerge** in a similar manner as described above to create a Constant Contact email export file in the xls format.

Refer to the “Exporting Information to a File” section of the *DonorPerfect Reports Guide* for more information on using the file export functions.

Once created, the export file can be transmitted to Constant Contact using the import function on the Constant Contact website.

For more information on using Constant Contact with the DonorPerfect, refer to the *E-Marketing Services (Constant Contact) - Web Page* document in the Products & Services group of the Document/Video Library in the Clients section of the DonorPerfect website.