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

 - **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.



Since Constant Contact enables you to maintain multiple email lists, you may want to set up export templates to match the purpose of each of those lists.

mplate Name Cor	nstant Conta	ct-2		Template Type Main/Bio	•				
Share with Every	one	🔽 En	nail Type Template	Save & Close					
Clear All Sele	cted	#	Field Label	Field	*				
Attended Train	ning? 🔺	1	First Name	alltrim(iif(dp.switch,wrd(dpadd.secIn,-2,*,*)					
Attorney		2	Last Name	alltrim(iif(dp.switch,wrd(dpadd.secIn,-1,",")					
Attorney Phon	e	3	Job Title	alltrim(dpadd.ptitle)					
Auto-Calc #1		4	Company Name	alltrim(iif(dp.switch,dpadd.lname,dpadd.s					
Auto-Calc #2		5	Company Name 2	alltrim(iif(dp.switch,trim(dpadd.fname)*"*					
Auto-Calc #3		6	Work Phone	alltrim(getphone("W",2,1))					
Auto-Updated	By 1	7	Home Phone	alltrim(getphone("H",2,1)) alltrim(dpadd.add)					
Auto-Updated	Date 1	8	Address Line 1						
AUTOCALC4		9	City	alltrim(dpadd.city)					
		10	State	alltrim(dpadd.st)					
		11	Zip	alltrim(dpadd zip)					
Birthdate of Pa	erson	12	country	alltrim(dpadd.country)					
Board Contac	t	<u> </u>							
Cal. Yr. Avg 1	2003 -1								
۰ <u>۱</u>	•								
View Field Na	mes				-				
					1				

Figure 1. Name & Email Address Export Template

Leave the **Template Type** at its default of "Main/Bio," unless you want to add fields from other DonorPerfect tables to this template.

Leave the Email Type Template checkbox selected.

In the left hand column select the fields that you want to add to the export file and click **Add Selected Fields**. The system will move those fields into the right hand columns. In our example above, we have chosen to add the donors' birthdates.

Note that you should **not** modify the Field Labels for the first twelve fields; they are required by Constant Contact to remain as included in the default template.

If necessary, use the **Up** and **Down** buttons to change the order in which the selected field will be displayed.

If you want to delete a field, highlight that field and click **Delete**. However, do **not** delete any of the first twelve fields; they are required by Constant Contact.

- **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 *DonorPefect User Guide* for more information on creating export templates.

Recreating the Default Constant Contact Export Template

The Setup Constant Contact screen at **Modules** $2 \longrightarrow +$ **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
 - Click Modules
 Hoddles + Constant Contact to open the Setup Constant Contact as shown below in Figure 2.

😨 Setup Constant Contact	×						
An Export Format will be created under the name Constant Contact Use : Edit, Change Export Formats, to add personal fields. Use : Reports, Listing, Export, to generate the output file.							
A format already exists. It will be deleted and replaced with a basic one.							
<u>C</u> reate <u>E</u> xit							

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.

👷 Listings and Mailings 🔀 🔀								
Category	2 Select Export Type	Report Information						
Listings Labels Maimerge Emails Exonot to File (dbf xis txt)	Main/Bio Git/Pledge Transactions Contact Transactions Other Info Transactions	You can create an export file containing information from the Main, Address and Bio data entry screens in comma delimited or Export to Excel (CSV) format. This feature only exports the primary address and phone number per record. It allows inclusion of DonorPerfect functions such as prntname() and getphone().						
Export to File (csv)	<u>_</u>	Special Notes: Records that are checked "NO MAIL" will automatically be excluded, you must select the Include NO MAIL Names option when you want those records included. Check Include All Addresses to generate separate records for each address that was entered for each donor.						
3 Set Report Options Set Selection <u>F</u> ilter Include "NO MAIL" Na Suppress Professional Include All Addresses	Sort Order: ⓒ Alpha Ĉ Zip mes Ĉ <u>O</u> ther Title Ĉ <u>R</u> andon	Update Last Contact Update I ag Date 07/21/2009						
Export File Name								
Select Export Template		Dravian						
Constant Contact	INew Template	Edit Template						
1		Cancel						

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 **i** 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	В	С	D	E	F	G	н	1.1	J	K	L	M
1	Email	First Nam	Last Name	Job Title	Company	Company	Work Pho	Home Pho	Address L	City	State	Zip	counte
2	support@adamsmckinley	Andrew	Lockley	CEO	Adams Mo	Adams Mo	(215)622-8	3377	477 W. Vi	Philadelp	PA	19011	
3	jackland@hotbot.com	Bill	Murphy	CEO, Chai	Comcast 0	Comcast 0	able		1200 Wills	Willow Gr	PA	19056	3
4	jake@yahoo.com	Jacob	Dotsaur					(713)878-9	2015 72nd	Byron Cen	TX	78315	- 2
5	ec3465@yahoo.com	Bill	Ford	Senior Gro	Ford Four	Ford Four	dation		2800 Engi	Detroit	MI	76031	3
6	Fred@Garven.com	Fred	Garvin				(215)352-9	(212)354-0	1231 Mary	New York	NY	20002-533	5 J
7	cramer234@yahoo.com	Brian	Hans						42 Swift R	Orlando	FL	21056	3
8	dpsupp@aol.com	Edward	Hobart						3335 Perry	San Diego	CA	92166	- 2
9	dunn@hotbot.com	Jon	Humphrey	/					342 Windi	Los Angel	CA	76742	
10	bh@excite.com	Dan	Mayer						6878 Old 9	Billings	MT	57664	3
11	jf23@excite.com	Paul	Thomas		Methacto	Methacto	n High Scho	ool	1020 Plym	Methacto	PA	19310	ź
12	heartbreaker@aol.com	James	Miller						112 Fairvi	Brooklyn	NY	7417	- 3
13	mayer1223@exite.com	Dave	Polk						653 Ice Ro	Trenton	NJ	45302	- 3
14	glemonde@procyclingfn	Le	Monde	Executive	Pro Cyclin	The Pro C	(731)555-5	5555	1952 Faus	Bulls Gap	TN	37711	्र
15	marys@sandstone.com	Roger	Sandstone	9			(215)628-3	(215)628-0	2522 N. A	Philadelph	PA	19115-330	9 ⊰ੇ
16	rsandstone@donorperfe	Roger	Sandstone	e .			(215)628-3	(215)628-0	2522 N. A	Philadelph	PA	19115-330	9 <u>3</u>
17	info@donorperfect.com	Roger	Sandstone				(215)628-3	(215)628-0	2522 N. A	Philadelph	PA	19115-330	9 <u>}</u>
12	irm6842@mboo.coma.c	Piebard	6 dawalan						52526(all)	Chicago	N	A 20785	

Figure 4. Constant Contact Email Address Export File in Excel



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.