

shelby

v.5

How To

Use the Constant Contact Upload Report

Updated: 7/7/2011

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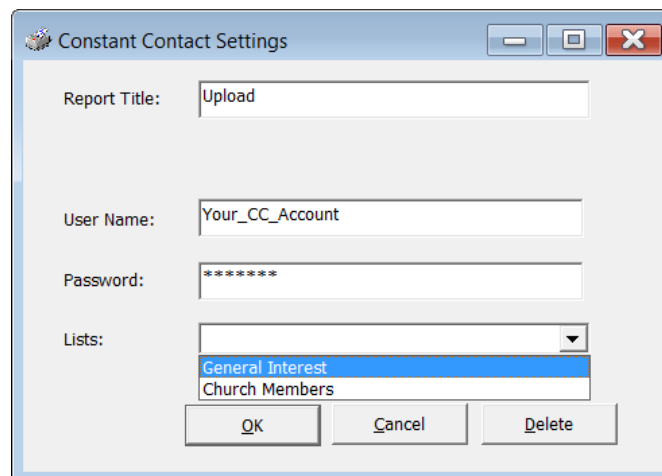
Prepare your Constant Contact account to receive names from Shelby v.5

Before you can upload to Constant Contact, you need to have an account with them and also have a list prepared to receive the names from Shelby v.5. Assuming you already have a Constant Contact account, the following steps will help you prepare a list to receive data using the Constant Contact Upload report in Selections and Listings. If you already have a list ready, skip to the next topic.

1. Log into your Constant Contact account.
2. Click on the **Contacts** tab.
3. Click on **Create New** under the My Lists section of the page.
4. Enter the **List Name**. Give the list a name that you will easily recognize when you are ready to upload into it.
5. Optionally, check the boxes for **Join My Mailing List Form** and **Autoresponder**, depending on your preferences.
6. Click **Save**.

Create a Selections and Listings report that selects the desired names and uploads them to Constant Contact

1. Start Selections and Listings and create a new report.
2. Define the **Criteria** to select the names you want to upload to Constant Contact.
3. Under Reports, double-click the **Constant Contact Upload** report type.
4. Enter a **Report Title**. The title is not optional, but it does not appear in any output.
5. Enter your Constant Contact **User Name** and **Password**.
6. Click on the drop-down option at the bottom of the window. It will take a moment to populate with your Constant Contact **Lists**. Once the drop-down opens up, choose the appropriate list.



7. Click **OK**.
8. Save, close, and run the report.
9. The system will select the names based on your criteria and then upload names and e-mail addresses to your Constant Contact list. The following facts are true about the upload process:
 - a. Only name and e-mail address are uploaded to Constant Contact, no other information.
 - b. If the name has no e-mail address on record, it will not be sent to Constant Contact.
 - c. If the e-mail address is already in the Constant Contact list, it will not be uploaded again.
10. You will see a reminder that it may take several minutes for Constant Contact to process the upload. Click **OK** to acknowledge the message.