SugarCRM - Constant Contact

Integration

Operations
Manual

Created by

Faye
Business
Systems
Group

Helping you over the wall.

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Compatibilities

This software is currently compatible with:

Constant Contact
SugarCRM v6.3
SugarCRM v6.4
SugarCRM v6.5

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Overview

SugarCRM is the leading open source CRM software package in the world. Constant Contact offers email marketing software that makes it easy to create and manage your email campaigns without the need for technical skills. These two systems working together can enable your sales and marketing team to reach levels of productivity that will elevate your business to the next level. No longer will your team have to manage multiple databases to reach your customer.

The FBSG SugarCRM – Constant Contact Integration Application offers you both a detailed and high level view of your marketing efforts. It allows the two software packages to "communicate with one another" by syncing customers, email addresses, marketing lists, campaign results, individual email tracking, and removal results. The synchronization runs with the SugarCRM scheduler and can be set up to run when and as often as makes sense for your business. The FBSG Integration offers a cloud based integration, the only SugarCRM – Constant Contact integration that does not require a desktop application.

Key Benefits

- Eliminate double entry of customers in Constant Contact
- Download contacts to import into SugarCRM
- Update marketing lists within SugarCRM
- View campaign results within SugarCRM
- Mass update marketing lists within SugarCRM
- View individual campaign results under each contact or lead
- Keep a complete history of email results
- Create reports in Sugar from your Constant Contact results

Installation

Procedures – Installation

This application synchronizes data between SugarCRM and Constant Contact. The installation requires two steps:

A. Installation of the SugarCRM – Constant Contact Integration module within SugarCRM
B. Configuration of module

You will need the following file from FBSG to complete the installation:

FBSG_SugarCRM_ConstantContactIntegration.zip

1. Log in to your SugarCRM instance using an account with Administrative privileges.

2. Go to the Administration page within Sugar (Click 'Admin' in the upper right corner).

3. Click 'Module Loader.'
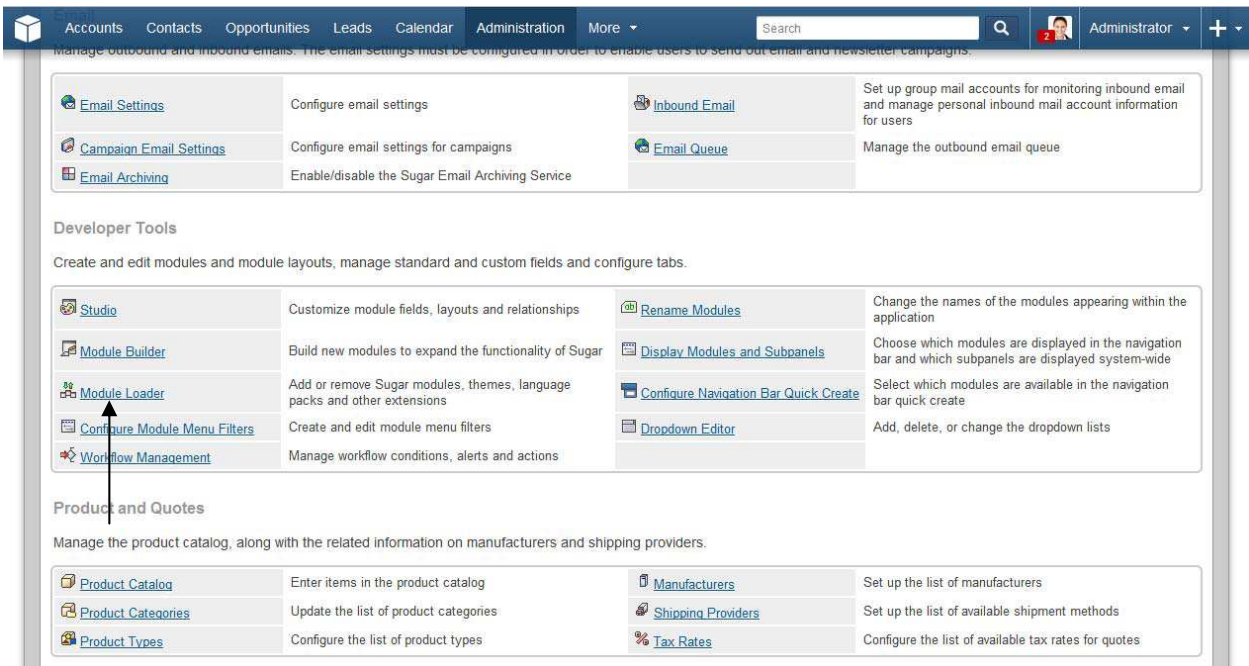
Procedures – Installation (Continued)

4. Click 'Choose File,' find *FBSG_SugarCRM_ConstantContactIntegration.zip*, press 'Open', then press 'Upload.'
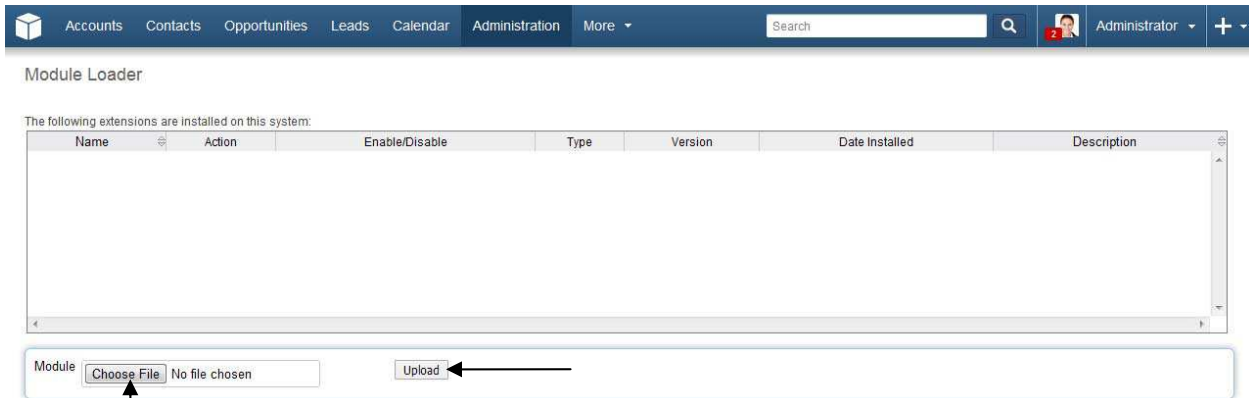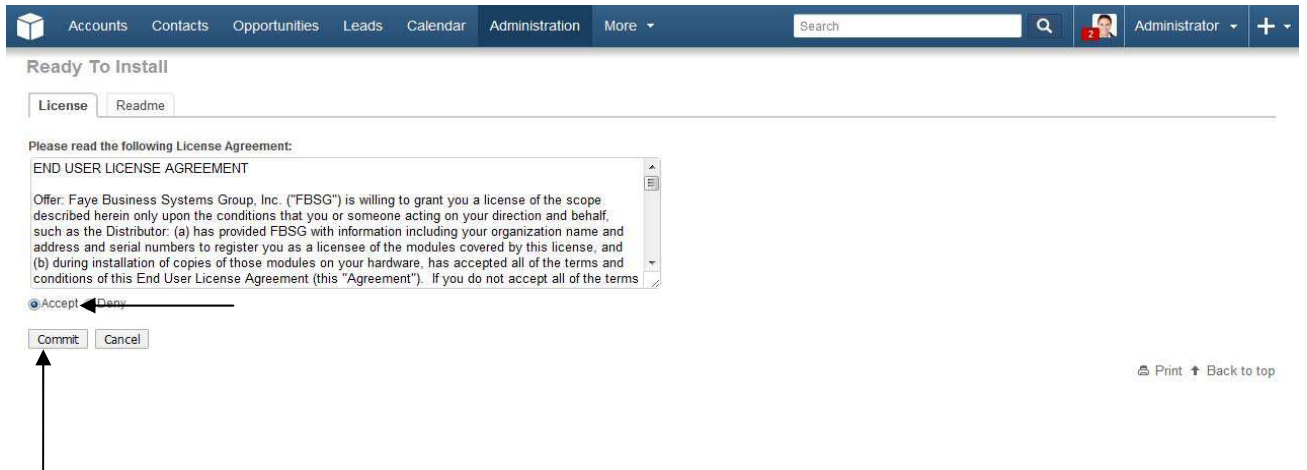
5. Click 'Install,' to proceed.
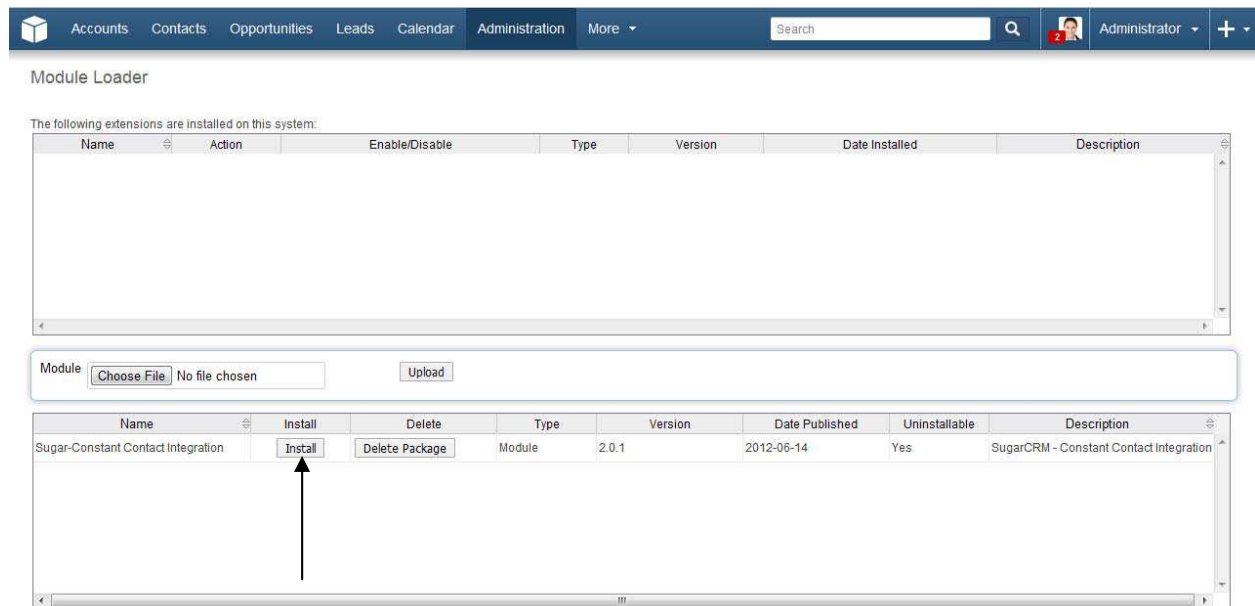
Procedures – Installation (Continued)

6. Click 'Install,' accept the license agreement, and click 'Commit'.

7. The module will install.

Procedures – Installation (Continued)

8. Click the 'Administration' tab, and then click 'Repair.'

Procedures – Installation (Continued)

9. Click 'Quick Repair and Rebuild'.

Procedures – Installation (Continued)

10. Scroll to the bottom of the page, and click 'Execute.'

Procedures – Installation (continued)

11. Scroll to the bottom of the page, and confirm that the messages 'Done' and 'Database tables are synced with vardefs' appear on the SugarCRM screen.

Configuration

Procedures – Configuration

Note: You may have to log out and log back in after you "execute" in order for the "Constant Contact control panel" to appear in the admin screen (see below screen shot).

1. Navigate to the 'Admin' screen, scroll to the bottom, and click 'Constant Contact Control panel'.
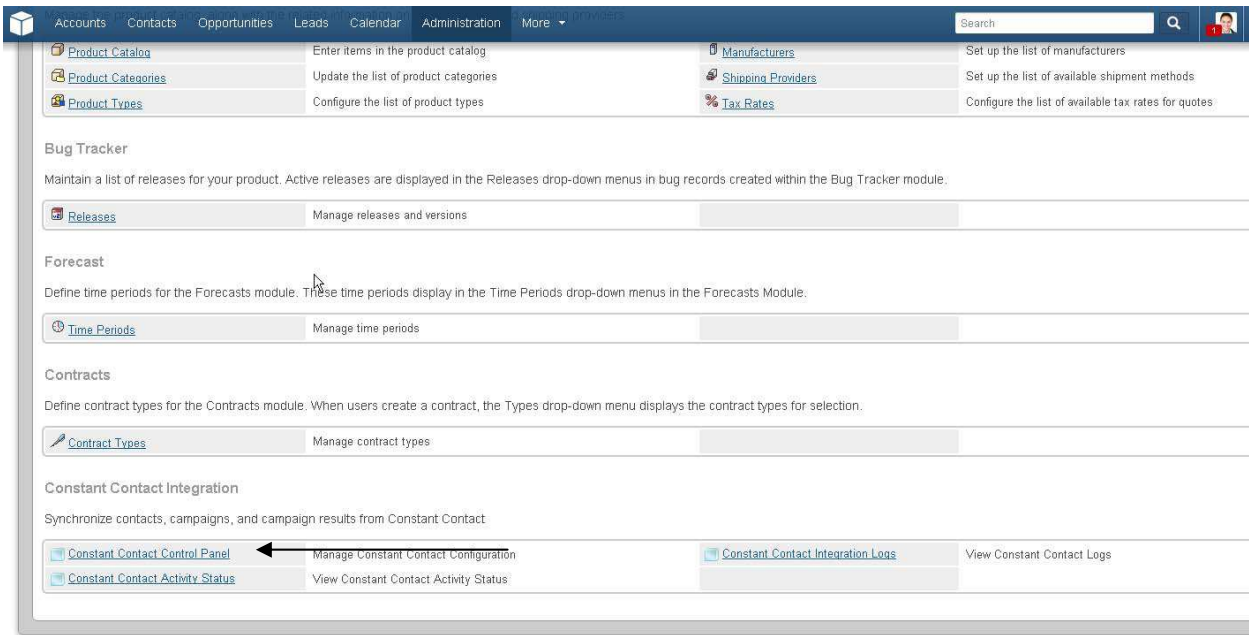
2. Enter your Constant Contact username, password, and the FBSG license key then click 'Add Account'.

Procedures – Configuration (continued)

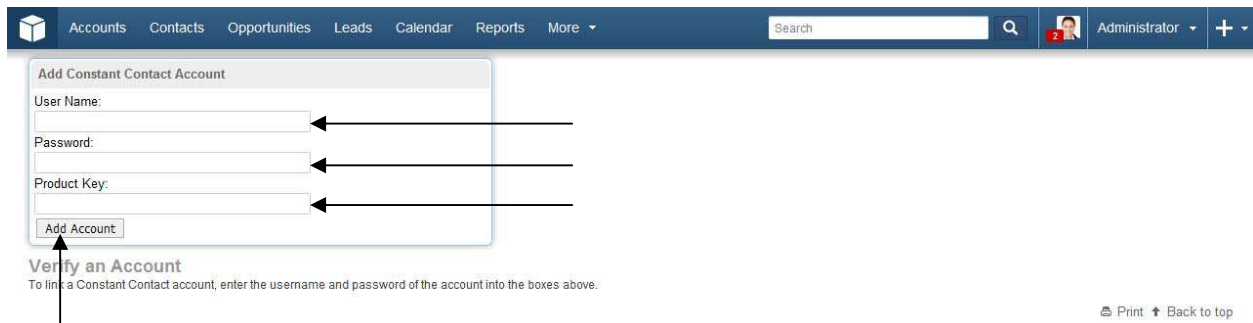2. Once your Constant Contact account has been verified, you now have the option to set the 'Default Lead Source for Imported Leads'. You can do so by navigating to the "options" tab of the integration control panel. This is only important if you plan on importing contacts from Constant Contact into Sugar. When you utilize the integration to set the lead source in Sugar, this will automatically assign that lead source to all contacts that are imported from Constant Contact into SugarCRM.
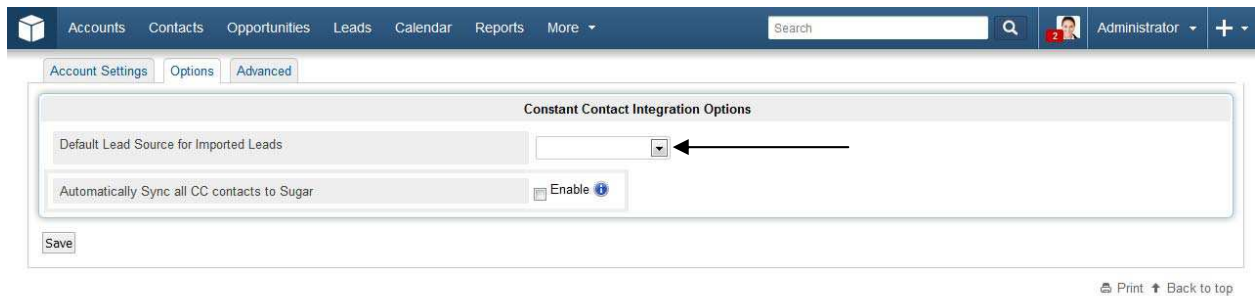
You also have the ability to set our SugarCRM – Constant Contact Integration to automatically Sync all Constant Contact contacts to a particular SugarCRM module. You can do so by checking the "Enable" check-box. Once the checkbox is enabled, you now have the option to automatically import all Constant Contact contacts to the targets, leads, or contacts module. This feature will import ALL constant contact contacts to an individual module. If you want to important different contacts to different modules, you will need to utilize the manual import process (see the section starting on page 18). This feature duplicates checks by email address, so if the contact already exists inside of Sugar, the integration will simply update the existing record.
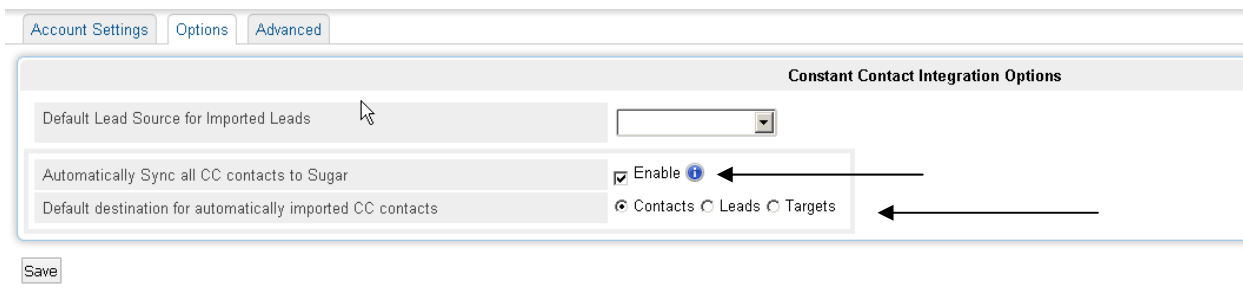
Creating Constant Contact email lists inside of SugarCRM

Creating Constant Contact email lists inside of SugarCRM

1) Hover over the "Target lists" module inside of SugarCRM and click on "Create Target list".
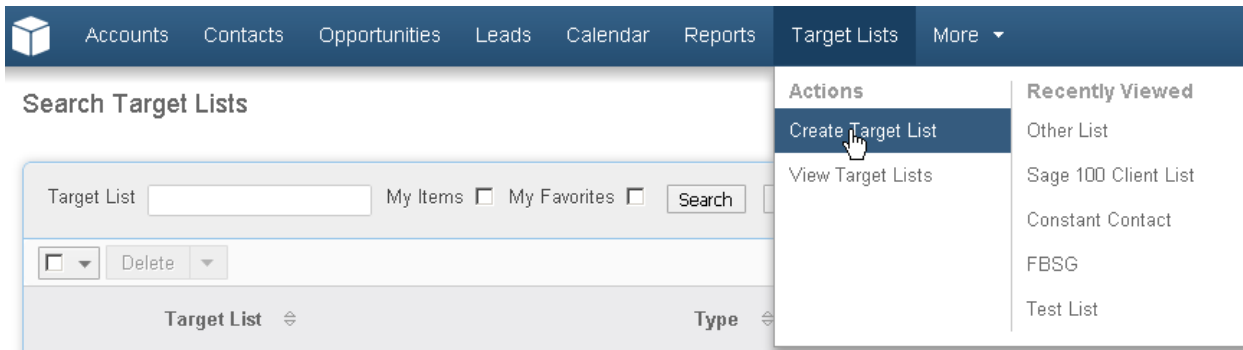
2) Create the name of your desired target list, and then check the "Sync List details to CC" checkbox. This will automatically send the list to Constant Contact upon clicking "Save". You can now add contacts/leads/targets to your Constant Contact Marketing list through SugarCRM.
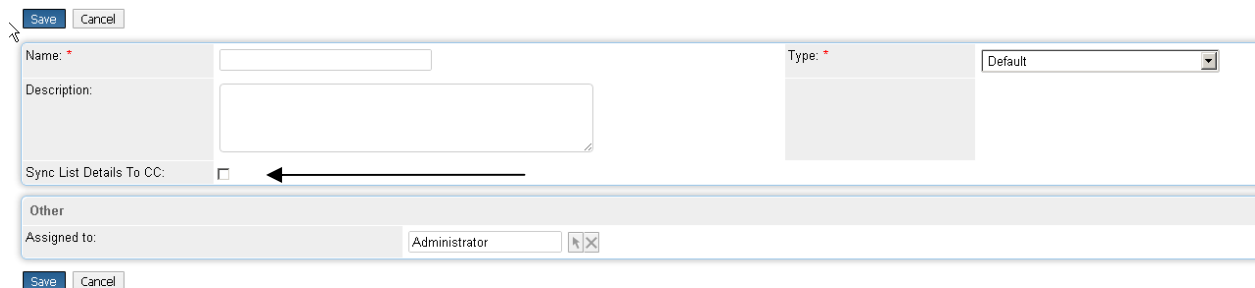
Manually Retrieving Constant Contact Information

Manually Retrieving Constant Contact Information

Please note that the "Download Campaigns" and "Sync list" manual processes only need to be run if you need an update <u>right away</u>. These processes are set to run on a scheduler automatically.

1. **Download Campaigns**:
   To retrieve all campaigns and campaign results from Constant Contact to SugarCRM, click the 'Download Campaigns' button (This may take 15-20 minutes). This will pull all campaign information from Constant Contact to SugarCRM (Opens, clicks, forwards, # of impressions, bounces etc.). You should only "Download Campaigns" after the initial configuration if you need the data right away after installing the integration. The "Scheduler" automatically retrieves all campaign information and runs in the background. Refer to page 31 - 35 for more information on the Scheduler and the Default Settings.
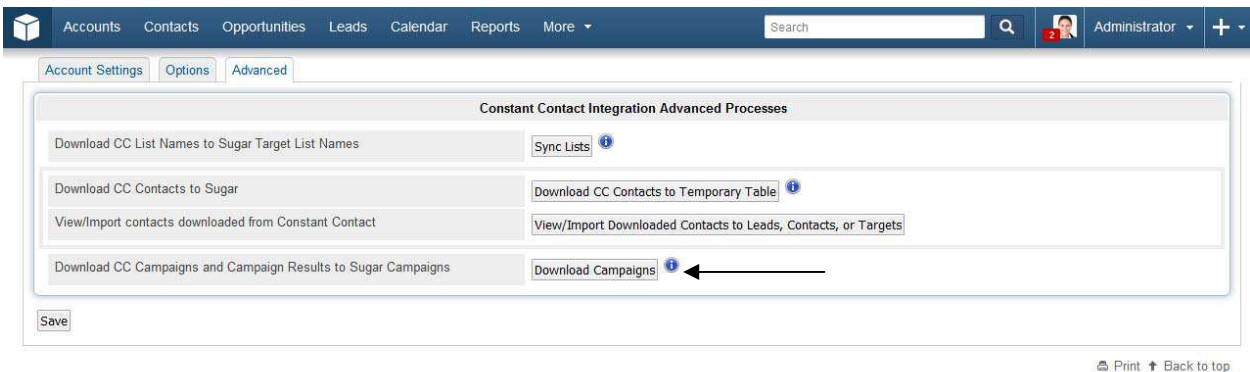
2. **Sync lists**:
   Allows you to pull over all of the contact list titles from Constant Contact to SugarCRM. Downloading these lists makes them available to be assigned to your contacts, leads, or targets.

   Please note this process is handled automatically via Scheduler. You only need to manually "Sync Lists" if you need the lists right away after installing the integration (See page 24 for more information on the Scheduler).
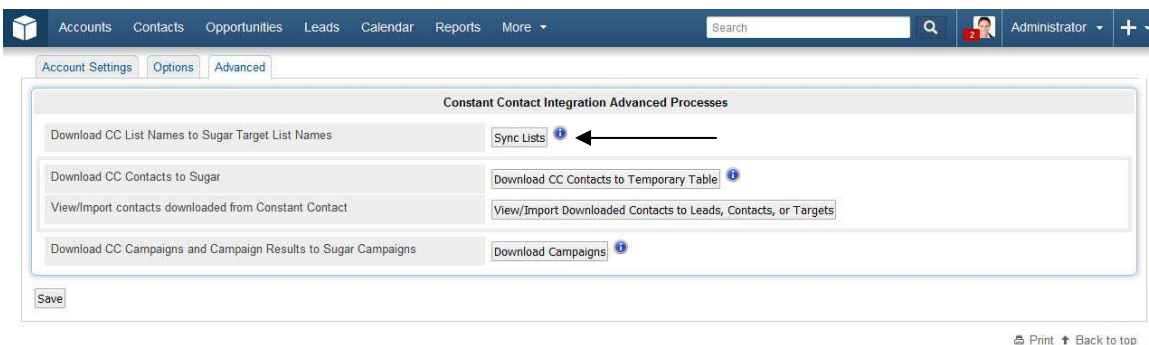
Manually Retrieving Constant Contact Information (continued)

3) **Downloading contacts from CC and merging with Sugar Contacts/Leads:**

The next sets of processes are designed to allow you to update Sugar contacts and leads with data from Constant Contact. Please note that all of these processes will not be relevant for all users, and that they are handled via Scheduler automatically. These manual processes are only required for specific purposes. Here is an overview:

a. Download Contacts   Pulls CC contacts into Sugar into a temporary location. This is required if you want to perform either one of the next two functions (b and c).

b. View/Import Downloaded Contacts   Based on the contacts downloaded (a), This function allows you to select which contacts you want to be added into Sugar as a contact/lead/target. This is generally only useful if you are a new Sugar user, but have been using CC for a while and want your Sugar records to be created from CC.
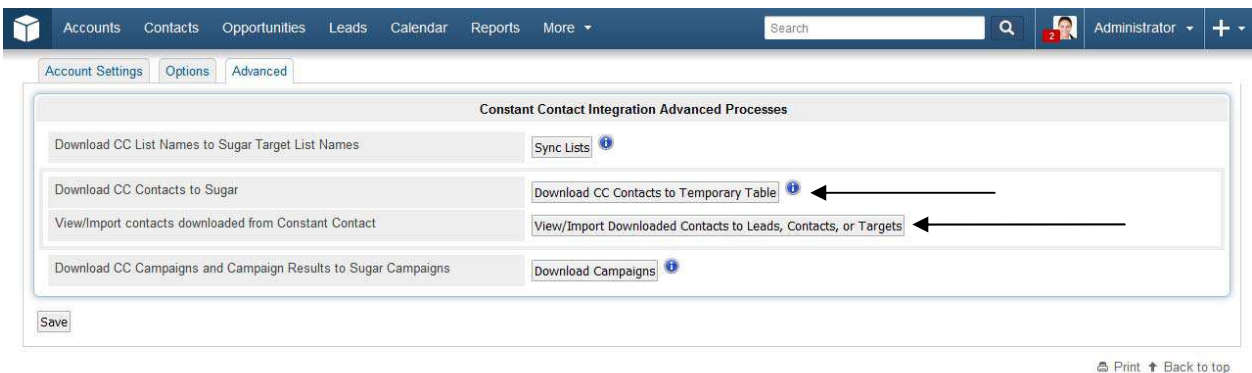

The next few pages provide detailed procedures relating to the processes above.

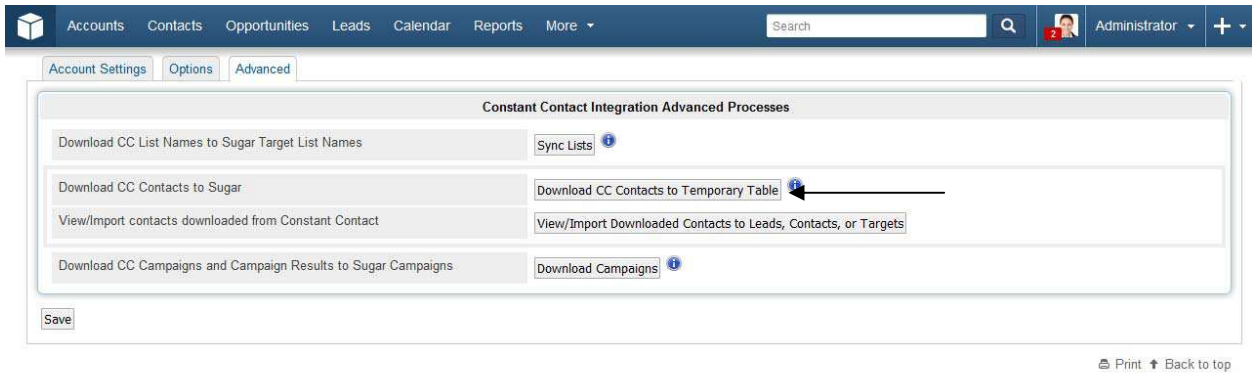Manually Retrieving Constant Contact Information (continued)

Download Contacts

You can download and import CC contacts into SugarCRM based on an email address association. This will allow you to download/import the contacts name, email address, phone number (if available) and any additional information stored on Constant Contact. The integration is built to check for duplicates, so if you try to import a contact that already exists in SugarCRM, the integration will simply update any information that is not already stored in SugarCRM.

In order to download contacts, you first must go to: Admin → Constant Contact Control Panel.
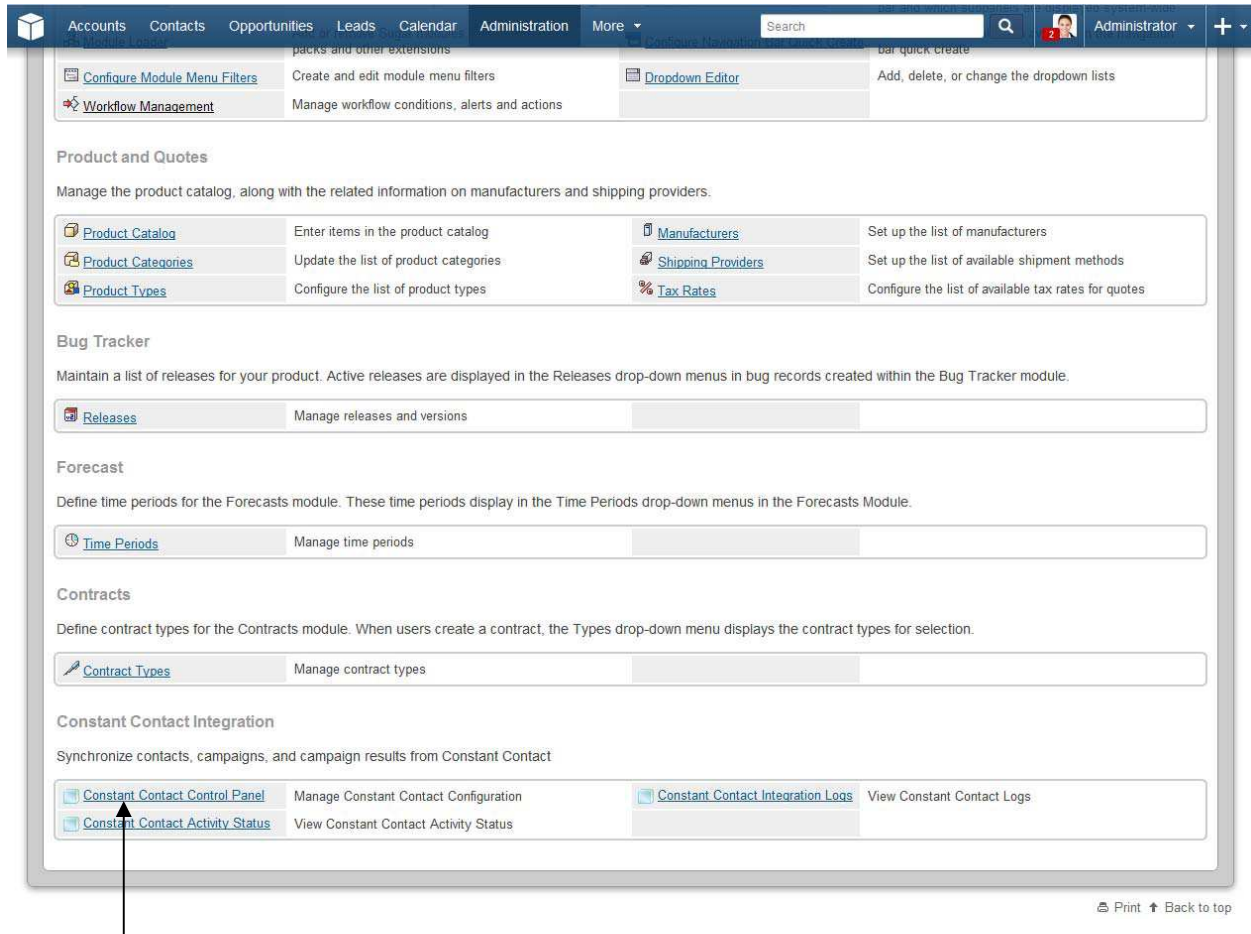
You now must select "Download contacts".

Once you have selected "download CC contacts to Temporary table", a table will appear with the contact lists and a "pending" status. The amount of time this takes to finish varies on the amount of contacts associated with the lists. However, a download should generally take no longer than an hour for large contact lists (over 50k contacts) and no longer than 5 minutes for smaller contact lists (under 10k contacts).

Manually Retrieving Constant Contact Information (continued)

Upon completion of the download, the table will automatically update from "PENDING" to "COMPLETE". Once this has occurred, you now have the option to import contacts by selecting the "View/Import Downloaded contacts to leads, contacts, or targets." tab.

Manually Retrieving Constant Contact Information (continued)

View/Import Downloaded Contacts

Once you have selected the "View/Import Downloaded Contacts", a contact list will appear. You now have the option to either individually select contact(s) to import, or you can "mass update" and import all contacts. The importing feature allows you to import the contacts to the leads, targets, or contacts module in SugarCRM.

Note – this function is only relevant if you want to import contacts from Constant Contact.

Manually Retrieving Constant Contact Information (continued)

You can view the integration Activity Status and Integration Logs. These logs will keep records of how often processes are running. In addition, the logs will let you know what processes are succeeding and which are failing.
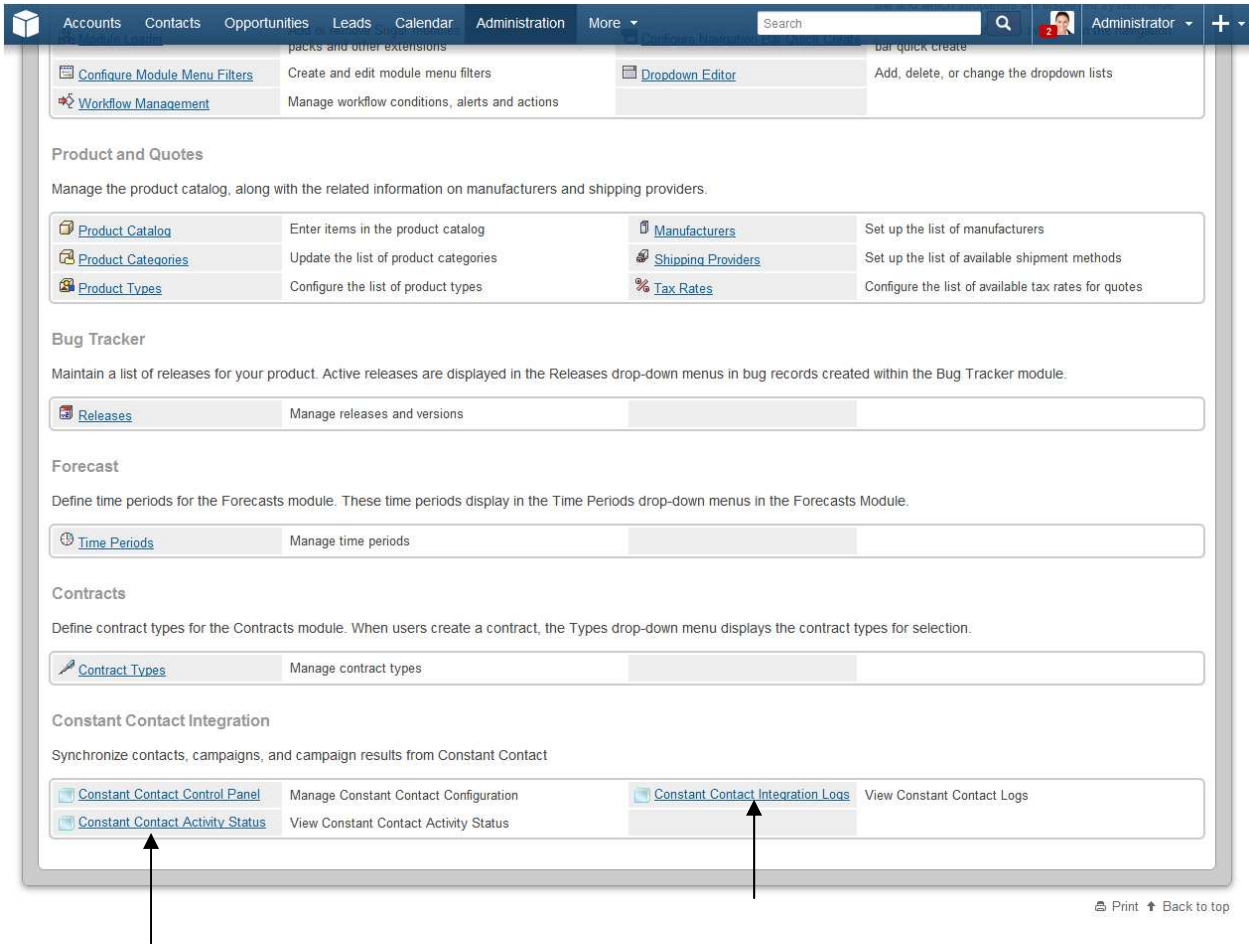
Upload Individual Contacts and Leads from Sugar to Constant Contact

Uploading Leads and Contacts from SugarCRM to Constant Contact

To upload an individual contact or lead to Constant Contact, you need to go to the individuals contact/lead/target detail view inside of SugarCRM, click "edit" and then click the 'Sync to Constant Contact' checkbox, highlight the lists you'd like to sync the contact/lead to, and save the record. This will either create a new contact if it doesn't exist on Constant Contact, or update an already existing record.
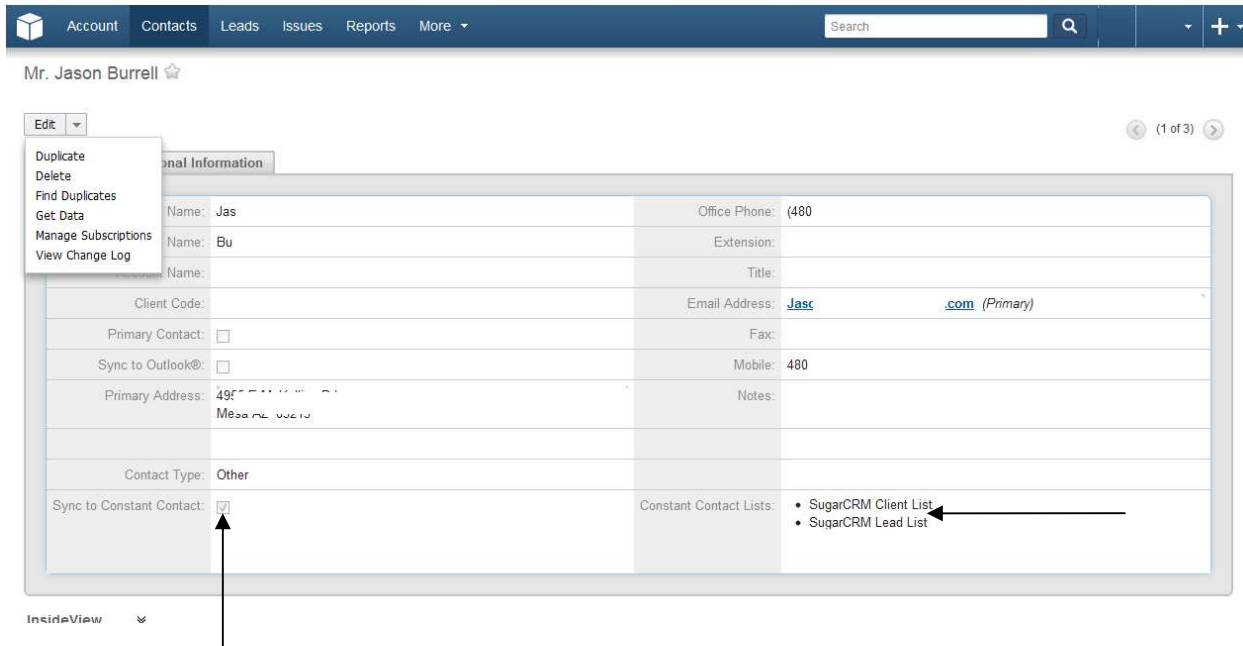
Uploading Leads and Contacts from SugarCRM to Constant Contact (continued)

To stop syncing contact/lead information, uncheck the Sync to Constant Contact box. Alternatively, to remove a contact/lead from a specific mailing list, The constant contact box must be checked, and then you can deselect the mailing list from the dropdown (CTRL + left click to uncheck a list).
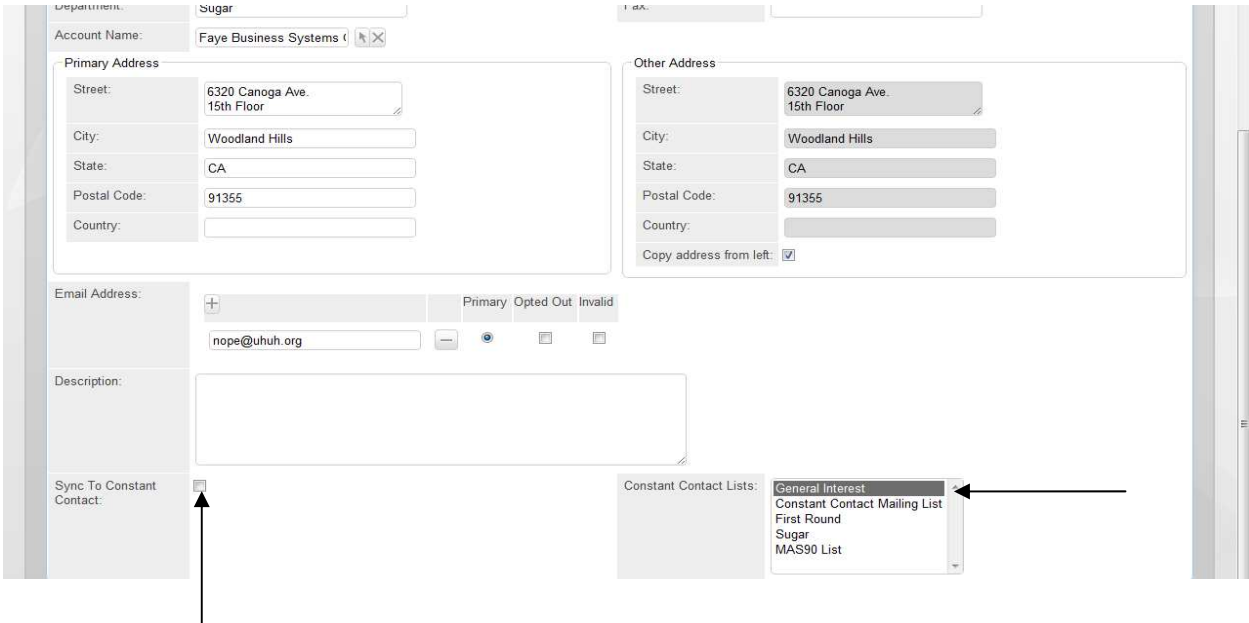
Constant Contact will sync contact information upon your saving of the Sugar record.
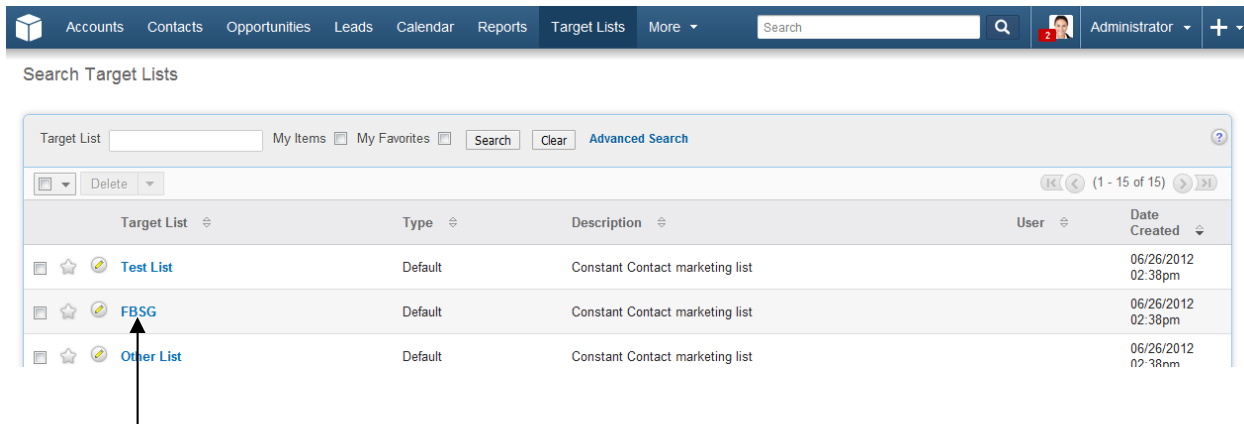
This feature will upload the following fields from SugarCRM to Constant Contact:

First and last name
Email address
Company name
Job title
Home phone/Work phone
Street address/City/State/ Zip Code/Country

Mass Uploading of Contacts and Leads from SugarCRM Target Lists to Constant Contact

Mass Uploading of Contacts and Leads from SugarCRM to Constant Contact
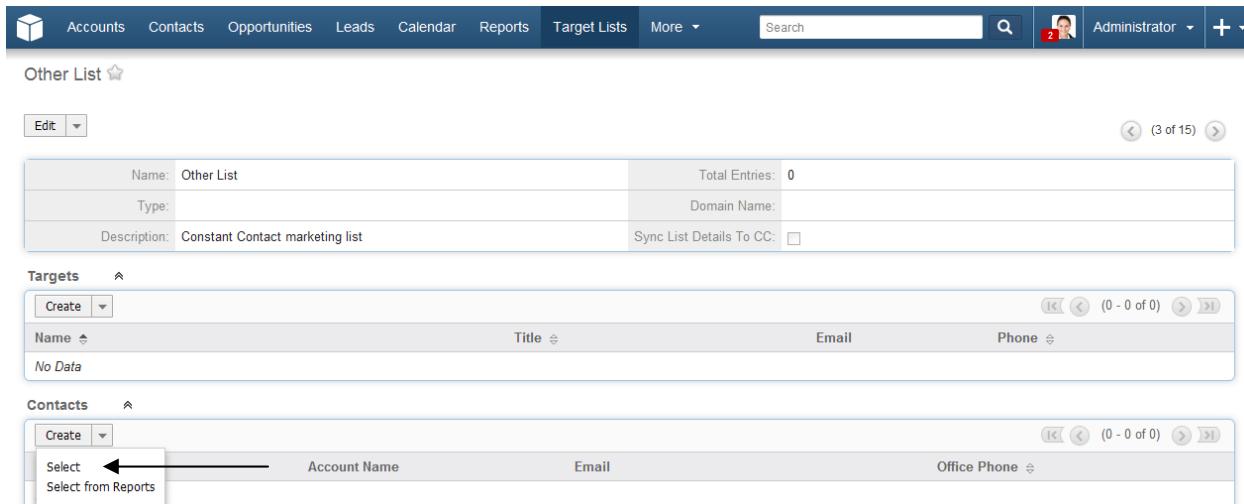
To set multiple contacts/leads to upload, you must first go to the "target lists" module, and click on an individual list to edit.

Once you have selected the list to edit, you are now able to see all of the contacts associated with the constant contact list. To add contacts to the list , simply click the "select" button on the contacts module.

Mass Uploading of Contacts and Leads from SugarCRM to Constant Contact (continued)

All of your contacts will appear under the 'contact list'. To add contacts, simply click on the checkbox on the left of the individual contacts you want to add/sync, then press "select". You may also select all of the contacts by clicking on the mass update checkbox to the left of the "Name" field. You may also assign a user to the contacts you are syncing to the list by selecting a user to the right of "Assigned to".

Accessing/Using the SugarCRM Scheduler to Manage Synchronization

Accessing/Using the Scheduler to Manage Synchronization

Please note that the scheduler is setup automatically when the Sugar-Constant Contact integration is first installed. There is no need to access the scheduler unless you want to change the default settings.

There are 5 Schedulers related to the Constant Contact integration within the SugarCRM scheduler. All of the schedulers have default synchronization schedules and you will only need to change them if the current schedules don't fit your business needs:

*Handle Mass Export to Constant Contact (Every 2 hours by default)
*Update CC Campaign Results (Every midnight by default)
*Download CC data (Often as possible by default)
*Import CC Data (Every ½ Hour)
*Auto CC Download Sync (Every midnight by default)

Handle Mass Export: When adding contacts or leads to target list(s), you can schedule the export to synchronize contact information from SugarCRM to Constant Contact.

Update CC Campaign results: Allows you to schedule the transfer of all campaign results from Constant Contact to SugarCRM (Opens, forwards, click-throughs, bounced emails, etc.)
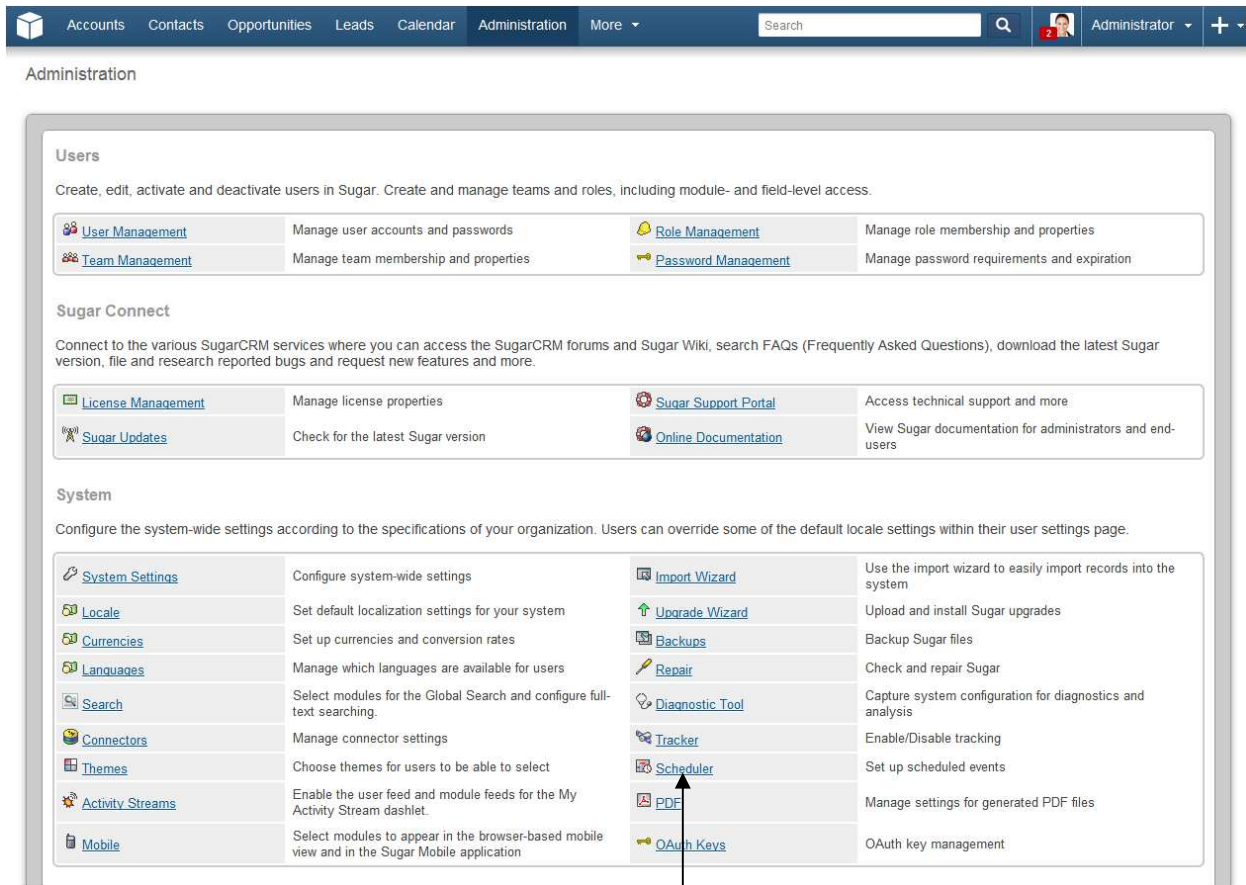
Download CC data: Schedule downloads of all constant contact's contact information (name, email address, phone # etc.) to be stored on a temporary table.

Import CC Data: This allows you to schedule how often the Constant Contact data is imported (after the download).

Auto CC Download Sync: This allows you to schedule how often contacts will be automatically imported into SugarCRM from Constant Contact.

To change any of the above schedulers, you must access the administration module, and then click on the scheduler link under the "System" Group.

Accessing/Using the Scheduler to Manage Synchronization (continued)

You now have access to the schedulers and can edit them by clicking on the preferred scheduler.

Accessing/Using the Scheduler to Manage Synchronization (continued)

Below is a screen shot of a SugarCRM scheduler. You have the option to update as often as you would like. In the example below, we have selected to update every 24 hours. Once we click "save", our campaigns are now set to synchronize once a day. You can check the "advanced options" checkbox to set the exact time to update every day.

Reviewing Campaign Results by Campaign

Reviewing Campaign Results by Campaign

1. Navigate to the Campaigns module.

2. Select the campaign (also known by the CC Email Title) that you want to view.

3. The Constant Contact results will be displayed in the campaign record.

4. Click View Status on the right hand side of the Campaign details screen

5. View which contacts and leads were sent or attempted, viewed the email, opted-out, and click through (see below).

Reviewing Campaign Results by Campaign

Reviewing Campaign Results by Contact or Lead in SugarCRM

Reviewing Campaign Results by Contact or Lead in SugarCRM

1. Navigate to the contact/lead record.

2. View the email results in the Campaigns subpanel. You can see the exact link a contact or lead clicked on by viewing the "Web link" field in the campaign sub-panel for the contact, target, or lead record.

Technical Notes

Technical Notes

System requirements:

cURL and SimpleXMLElement enabled on web server
Sugar 6.0+ Community Edition, Professional, Corporate, Enterprise or Ultimate
Active Constant Contact account