

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

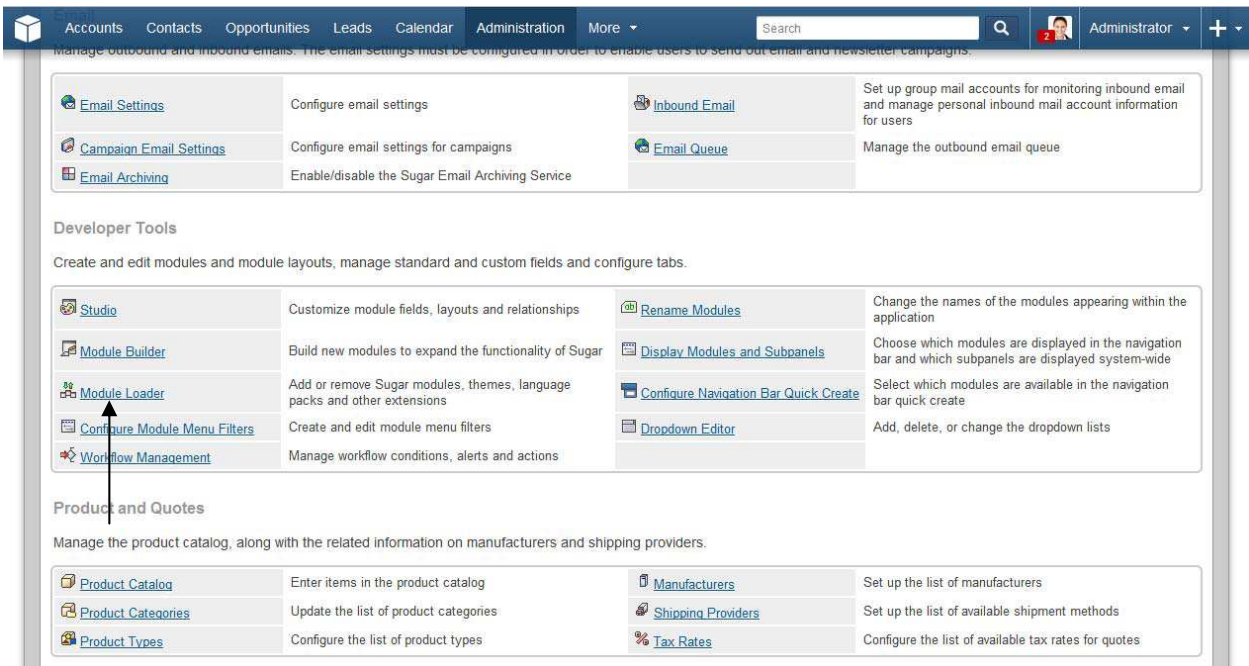
This application synchronizes data between SugarCRM and Constant Contact. The installation requires two steps:

- 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:

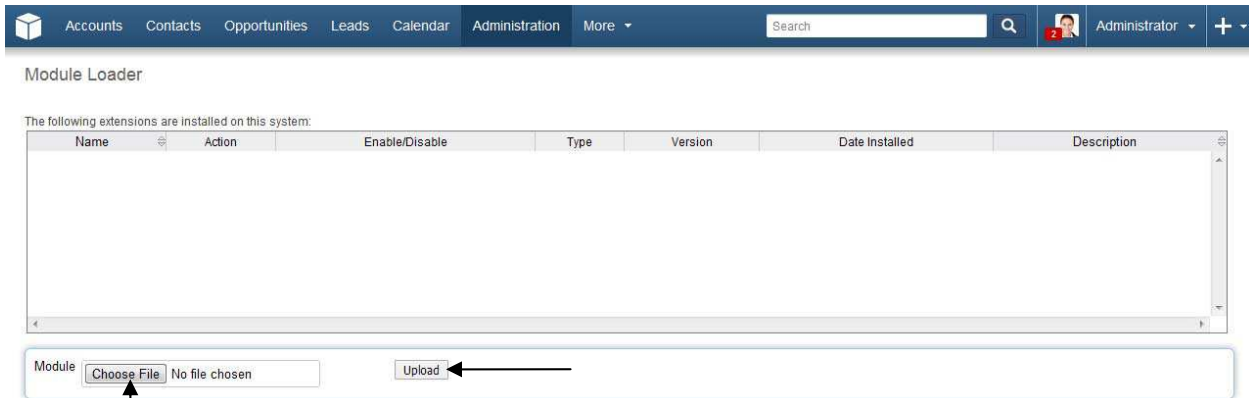
FBSG_SugarCRM_ConstantContactIntegration.zip

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.’

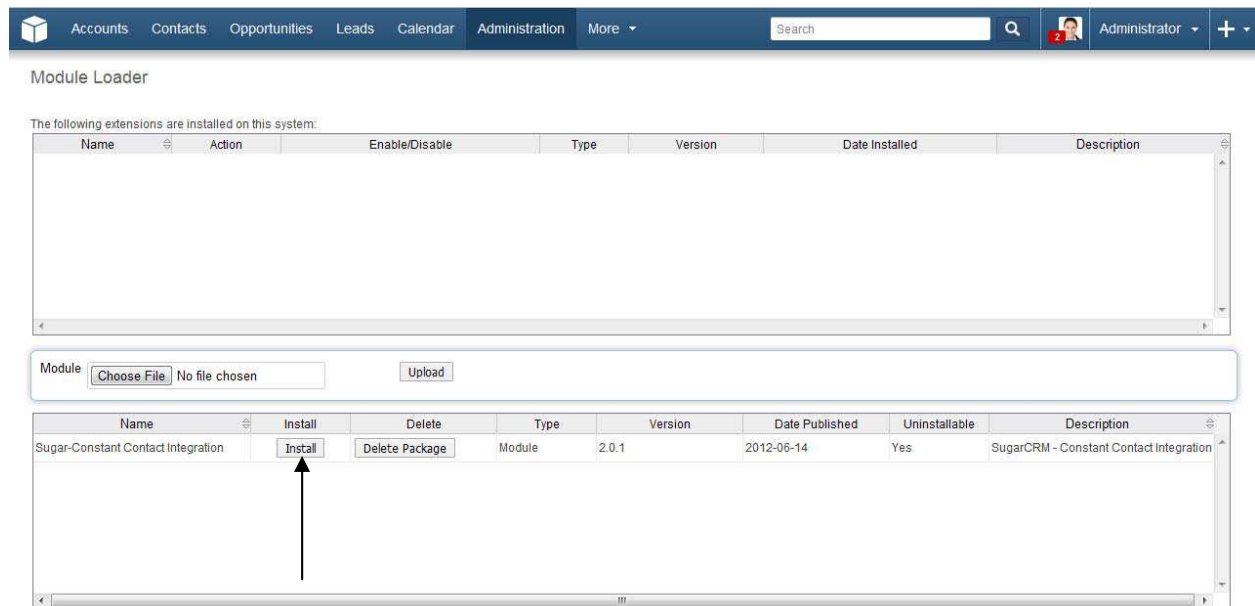


Procedures – Installation (Continued)

- Click 'Choose File,' find *FBSG_SugarCRM_ConstantContactIntegration.zip*, press 'Open', then press 'Upload.'

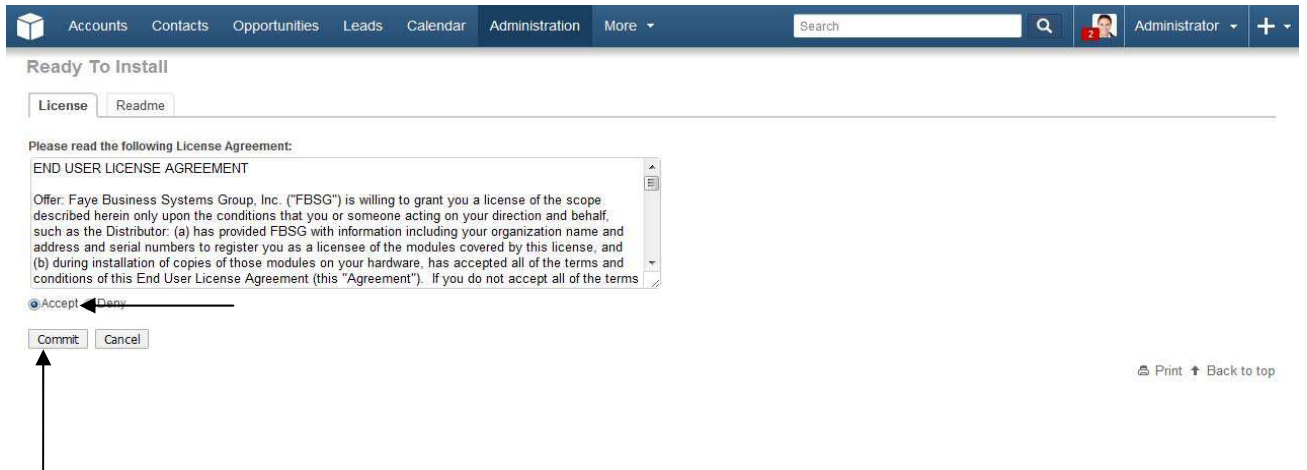


- Click 'Install,' to proceed.



Procedures – Installation (Continued)

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



Ready To Install

License | Readme

Please read the following License Agreement:

END USER LICENSE AGREEMENT


Offer: Faye Business Systems Group, Inc. ("FBSG") is willing to grant you a license of the scope described herein only upon the conditions that you or someone acting on your direction and behalf, such as the Distributor, (a) has provided FBSG with information including your organization name and address and serial numbers to register you as a licensee of the modules covered by this license, and (b) during installation of copies of those modules on your hardware, has accepted all of the terms and conditions of this End User License Agreement (this "Agreement"). If you do not accept all of the terms

Accept Deny

Commit | Cancel

Print | Back to top

7. The module will install.



100%

[Display Log](#)
Module Installed Successfully

[Back to Module Loader](#)

Print | Back to top

Procedures – Installation (Continued)

8. Click the ‘Administration’ tab, and then click ‘Repair.’

The screenshot shows the SugarCRM Administration interface. At the top, there is a navigation bar with tabs for Accounts, Contacts, Opportunities, Leads, Calendar, Administration, and More. The 'Administration' tab is selected. Below the navigation bar, the page title is 'Administration'. The main content area is divided into three sections: Users, Sugar Connect, and System. The 'System' section is expanded, showing a list of system settings and tools. The 'Repair' option is highlighted with a red arrow.

Section	Item	Description
Users	User Management	Manage user accounts and passwords
	Team Management	Manage team membership and properties
	Role Management	Manage role membership and properties
	Password Management	Manage password requirements and expiration
Sugar Connect	License Management	Manage license properties
	Sugar Updates	Check for the latest Sugar version
	Sugar Support Portal	Access technical support and more
	Online Documentation	View Sugar documentation for administrators and end-users
System	System Settings	Configure system-wide settings
	Locale	Set default localization settings for your system
	Currencies	Set up currencies and conversion rates
	Languages	Manage which languages are available for users
	Search	Select modules for the Global Search and configure full-text searching.
	Connectors	Manage connector settings
	Themes	Choose themes for users to be able to select
	Activity Streams	Enable the user feed and module feeds for the My Activity Stream dashlet.
	Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application
	Import Wizard	Use the import wizard to easily import records into the system
	Upgrade Wizard	Upload and install Sugar upgrades
	Backups	Backup Sugar files
	Repair	Check and repair Sugar
Diagnostic Tool	Capture system configuration for diagnostics and analysis	
Tracker	Enable/Disable tracking	
Scheduler	Set up scheduled events	
PDF	Manage settings for generated PDF files	
OAuth Keys	OAuth key management	

Procedures – Installation (Continued)

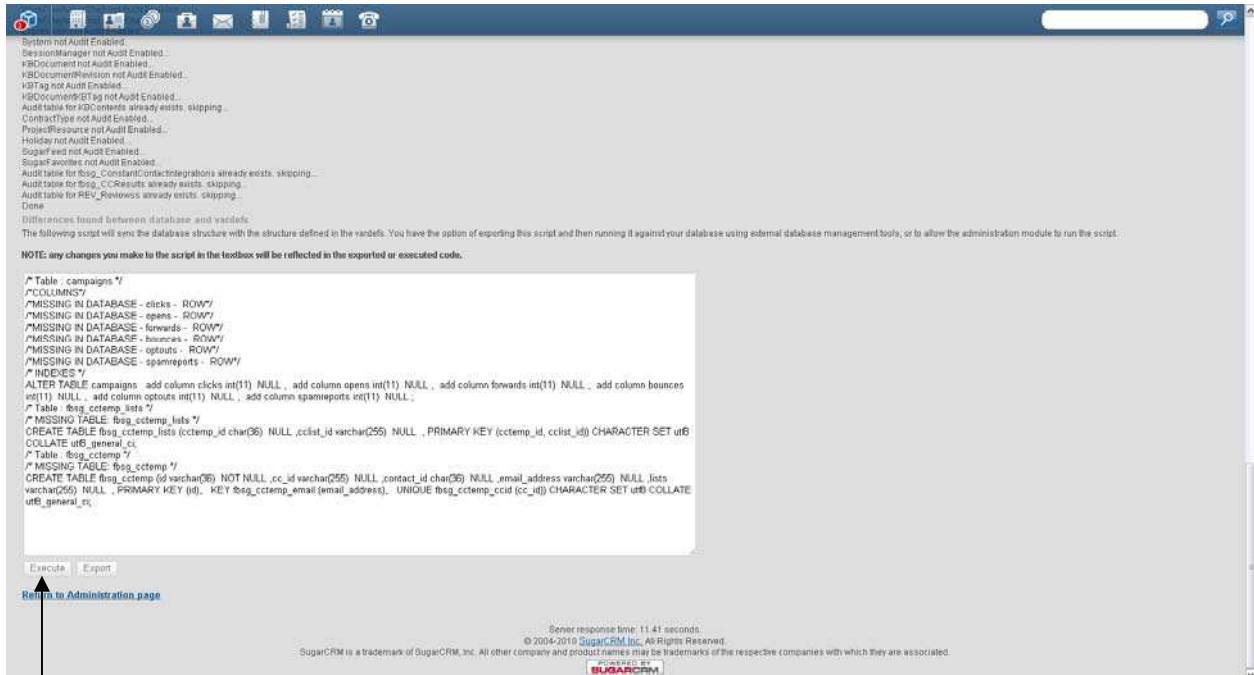
9. Click ‘Quick Repair and Rebuild’.

The screenshot shows the SugarCRM Administration interface. At the top, there is a navigation bar with tabs for Accounts, Contacts, Opportunities, Leads, Calendar, Administration, and More. A search bar and a user profile dropdown (Administrator) are also visible. Below the navigation bar, the 'Repair' section is displayed, containing a list of repair tasks. The 'Quick Repair and Rebuild' task is highlighted with a mouse cursor.

Task Name	Description
Quick Repair and Rebuild	Repairs and rebuilds DB, Extensions, Vardefs, Sugar Dashlets etc.
Upgrade Teams	Creates teams for users
Expand Column Width	Expands certain char, varchar and text columns in database (MSSQL ONLY)
Rebuild .htaccess File	Rebuilds .htaccess to limit access to certain files directly
Rebuild Config File	Rebuilds config.php by updating version and adding defaults when not explicitly declared
Rebuild Sugar Logic Functions	Rebuilds Sugar Logic functions cache
Rebuild Relationships	Rebuilds relationship metadata and drops the cache file
Rebuild Schedulers	Rebuilds out-of-the-box Scheduler Jobs
Rebuild Sugar Dashlets	Rebuilds the Sugar Dashlets cache file
Rebuild WorkFlow	Rebuilds the workflow cache & compile plugins after you re-install, drop tables or install a new workflow plugin
Rebuild Javascript Languages	Rebuilds javascript versions of language files
Rebuild JS Compressed Files	Copies original Full JS Source files and replaces existing compressed JS files
Rebuild JS Grouping Files	Re-concatenates and overwrites existing group files with latest versions of group files
Rebuild Minified JS Files	Copies original Full JS Source Files and minifies them, then replaces existing compressed files
Rebuild Sprites	Rebuilds the sprite images and configuration files
Repair JS Files	Compresses Existing JS files - includes any changes made, but does not overwrite original JS Source files
Repair Non-Lowercase Fields	Repair mixed-case custom table(s) and metadata file(s) to fix issues where code expects lowercase field names
Repair Teams	Rebuilds private team memberships based on user reporting hierarchy
Repair Roles	Repairs Roles by adding all new modules that support Access Controls, and by adding any new Access Controls to existing modules
Repair Inbound Email Accounts	Repairs Inbound Email accounts and encrypts account passwords
Remove XSS	Removes XSS Vulnerabilities from the database
Repair Activities	Repairs Activities (Calls, Meetings) end dates
Enable/Disable Seed Users	Quickly enable or disable seed users populated during demo installation.

Procedures – Installation (Continued)

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



Systems not Audit Enabled.
SessionManager not Audit Enabled...
VBCDocument not Audit Enabled...
VBCDocumentRevision not Audit Enabled...
VOTag not Audit Enabled...
VBCDocumentOTag not Audit Enabled...
Audit table for VBCDocuments already exists, skipping...
ContractType not Audit Enabled...
ProjectResource not Audit Enabled...
Holiday not Audit Enabled...
SugarFeed not Audit Enabled...
SugarFeed not Audit Enabled...
Audit table for fbsg_constantcontactintegrations already exists, skipping...
Audit table for fbsg_CCResults already exists, skipping...
Audit table for REV_Reviews already exists, skipping...
Done

Differences found between database and vandedf:
The following script will sync the database structure with the structure defined in the vandedf. You have the option of exporting this script and then running it against your database using external database management tools, or to allow the administration module to run the script.


NOTE: any changes you make to the script in the textbox will be reflected in the exported or executed code.

```
/* Table: campaigns */
/*COLUMNS*/
/*MISSING IN DATABASE - clicks - ROW*/
/*MISSING IN DATABASE - opens - ROW*/
/*MISSING IN DATABASE - forwards - ROW*/
/*MISSING IN DATABASE - bounces - ROW*/
/*MISSING IN DATABASE - optouts - ROW*/
/*MISSING IN DATABASE - spamreports - ROW*/
/* INDEXES */
ALTER TABLE campaigns add column clicks int(11) NULL , add column opens int(11) NULL , add column forwards int(11) NULL , add column bounces
int(11) NULL , add column optouts int(11) NULL , add column spamreports int(11) NULL;
/* Table: fbsg_cctemp_lists */
/* MISSING TABLE: fbsg_cctemp_lists */
CREATE TABLE fbsg_cctemp_lists (cctemp_id char(36) NULL ,cclist_id varchar(255) NULL , PRIMARY KEY (cctemp_id, cclist_id) CHARACTER SET utf8
COLLATE utf8_general_ci);
/* Table: fbsg_cctemp */
/* MISSING TABLE: fbsg_cctemp */
CREATE TABLE fbsg_cctemp (id varchar(36) NOT NULL ,cc_id varchar(255) NULL ,contact_id char(36) NULL ,email_address varchar(255) NULL ,lists
varchar(255) NULL , PRIMARY KEY (id), KEY fbsg_cctemp_email (email_address), UNIQUE fbsg_cctemp_ccid (cc_id) CHARACTER SET utf8 COLLATE
utf8_general_ci);
```

Execute Export

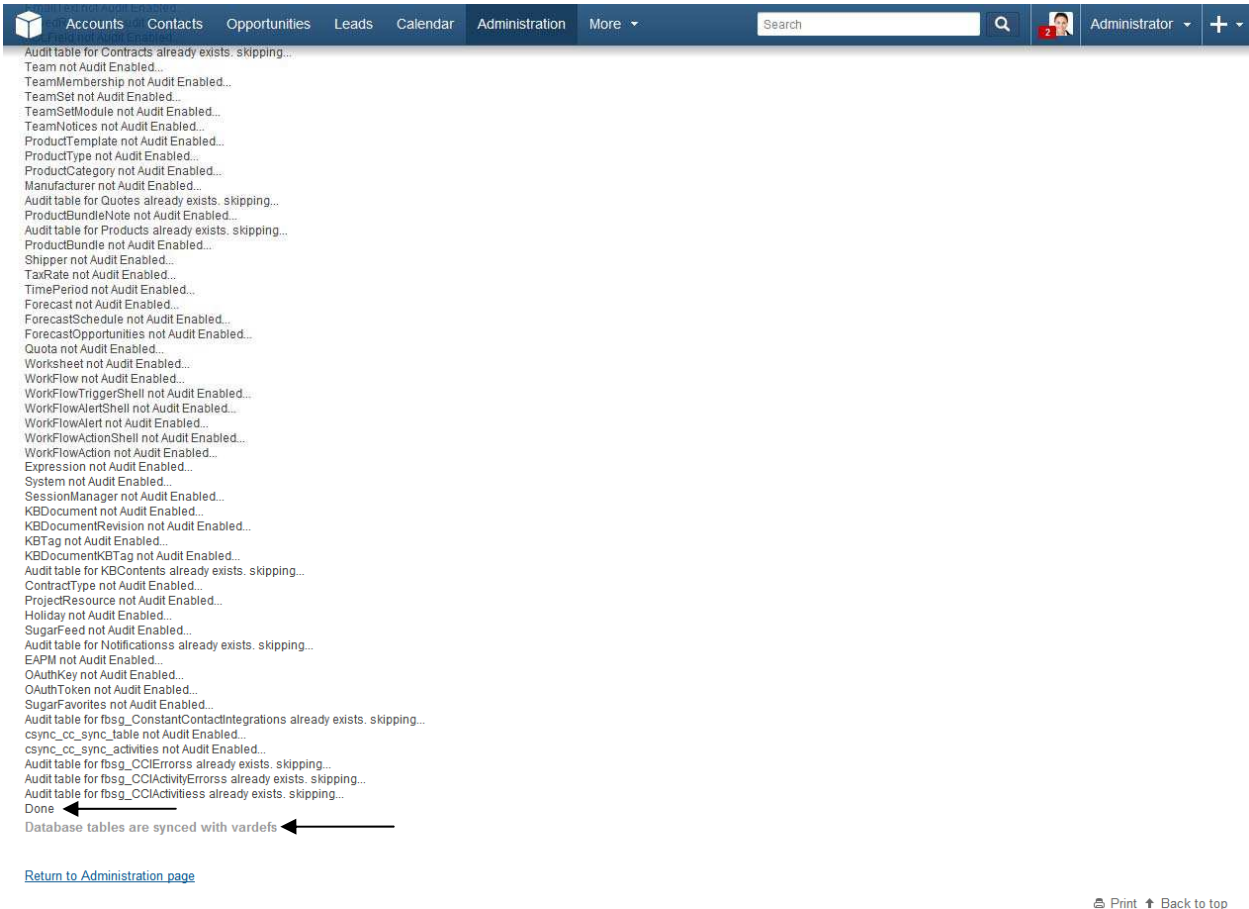
[Return to Administration page](#)

Server response time: 11.41 seconds.
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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.



Accounts Contacts Opportunities Leads Calendar Administration More ▾ Search Administrator ▾ + ▾

Audit table for Contracts already exists. skipping...
 Team not Audit Enabled...
 TeamMembership not Audit Enabled...
 TeamSet not Audit Enabled...
 TeamSetModule not Audit Enabled...
 TeamNotices not Audit Enabled...
 ProductTemplate not Audit Enabled...
 ProductType not Audit Enabled...
 ProductCategory not Audit Enabled...
 Manufacturer not Audit Enabled...
 Audit table for Quotes already exists. skipping...
 ProductBundleNote not Audit Enabled...
 Audit table for Products already exists. skipping...
 ProductBundle not Audit Enabled...
 Shipper not Audit Enabled...
 TaxRate not Audit Enabled...
 TimePeriod not Audit Enabled...
 Forecast not Audit Enabled...
 ForecastSchedule not Audit Enabled...
 ForecastOpportunities not Audit Enabled...
 Quota not Audit Enabled...
 Worksheet not Audit Enabled...
 Workflow not Audit Enabled...
 WorkflowTriggerShell not Audit Enabled...
 WorkflowAlertShell not Audit Enabled...
 WorkflowAlert not Audit Enabled...
 WorkflowActionShell not Audit Enabled...
 WorkflowAction not Audit Enabled...
 Expression not Audit Enabled...
 System not Audit Enabled...
 SessionManager not Audit Enabled...
 KBDocument not Audit Enabled...
 KBDocumentRevision not Audit Enabled...
 KBTag not Audit Enabled...
 KBDocumentKBTag not Audit Enabled...
 Audit table for KBContents already exists. skipping...
 ContractType not Audit Enabled...
 ProjectResource not Audit Enabled...
 Holiday not Audit Enabled...
 SugarFeed not Audit Enabled...
 Audit table for Notificationss already exists. skipping...
 EAPM not Audit Enabled...
 OAuthKey not Audit Enabled...
 OAuthToken not Audit Enabled...
 SugarFavorites not Audit Enabled...
 Audit table for fbsg_ConstantContactIntegrations already exists. skipping...
 csync_cc_sync_table not Audit Enabled...
 csync_cc_sync_activites not Audit Enabled...
 Audit table for fbsg_CCIErrors already exists. skipping...
 Audit table for fbsg_CCIActivityErrors already exists. skipping...
 Audit table for fbsg_CCIActivites already exists. skipping...
 Done
 Database tables are synced with vardefs

[Return to Administration page](#)

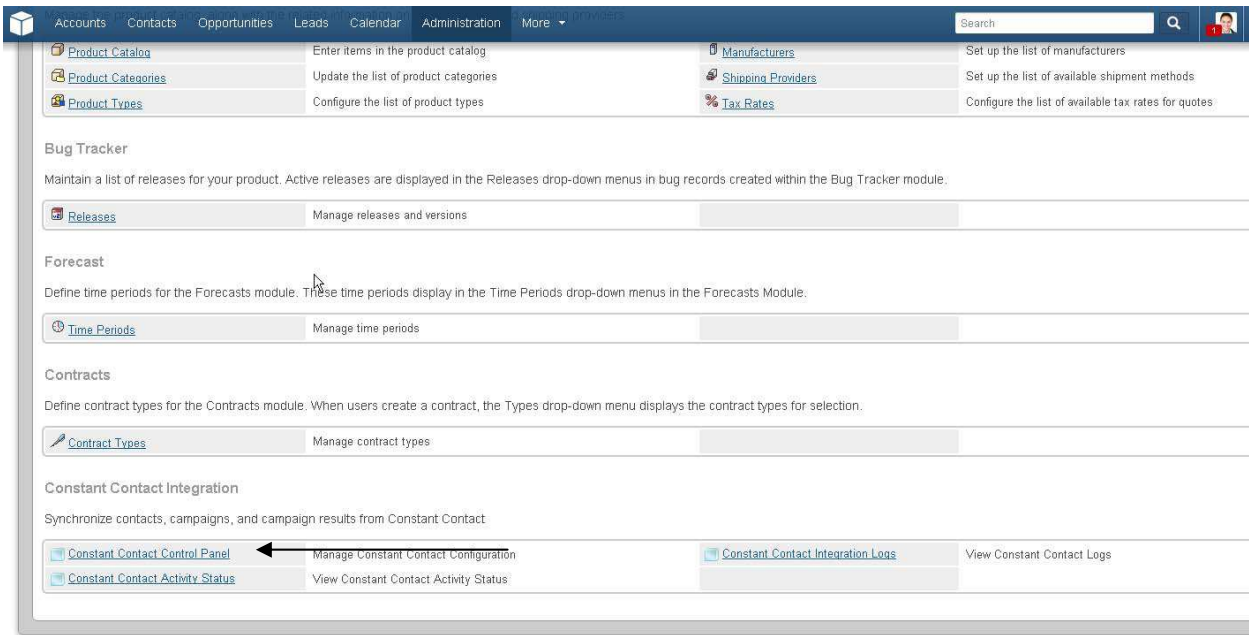
Print Back to top

Configuration

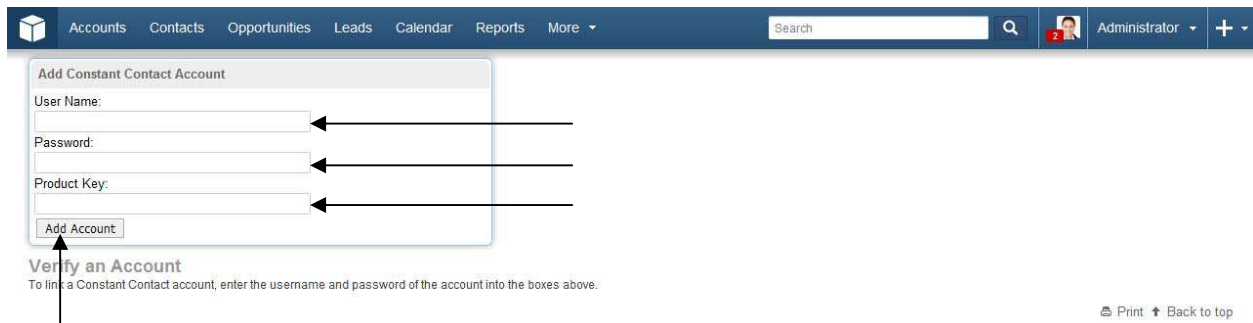
Procedures – Configuration

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’.

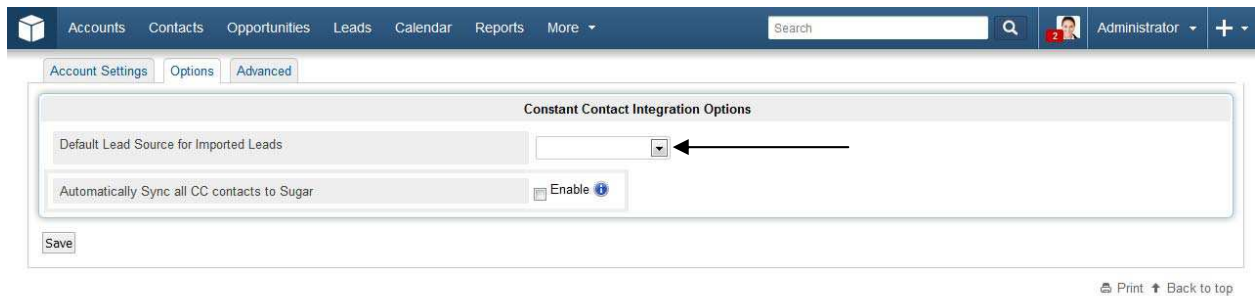


2. Enter your Constant Contact username, password, and the FBSG license key then click ‘Add Account’.

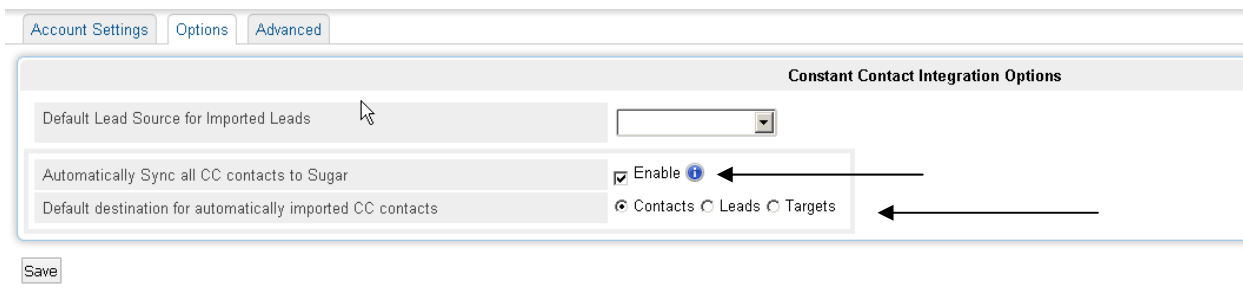


Procedures – Configuration (continued)

- 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.



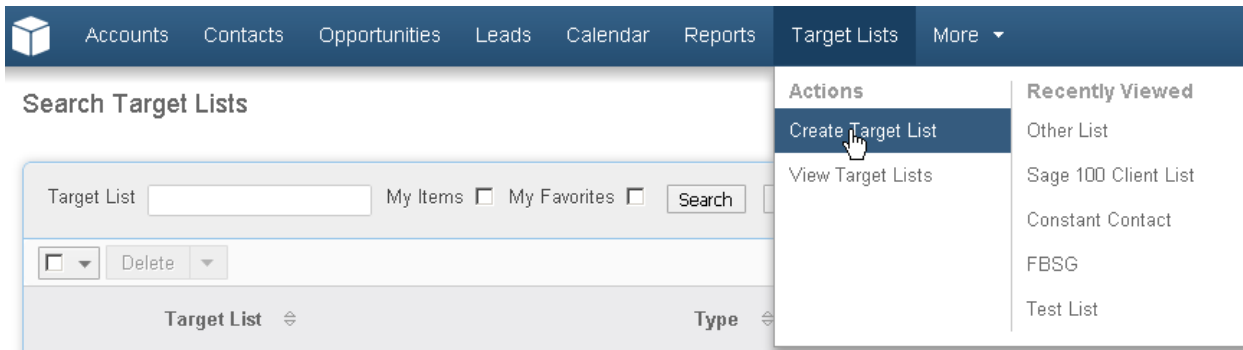
You also have the ability to set our SugarCRM – Constant Contact Integration to automatically Sync all Constant Contact contacts to a particular SugarCRM module. You can do so by checking the "Enable" check-box. Once the checkbox is enabled, you now have the option to automatically import all Constant 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.



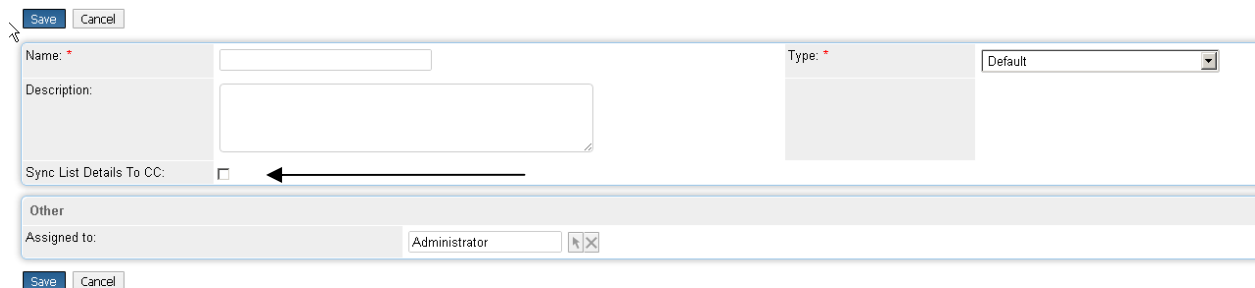
Creating Constant Contact email lists inside of SugarCRM

[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.



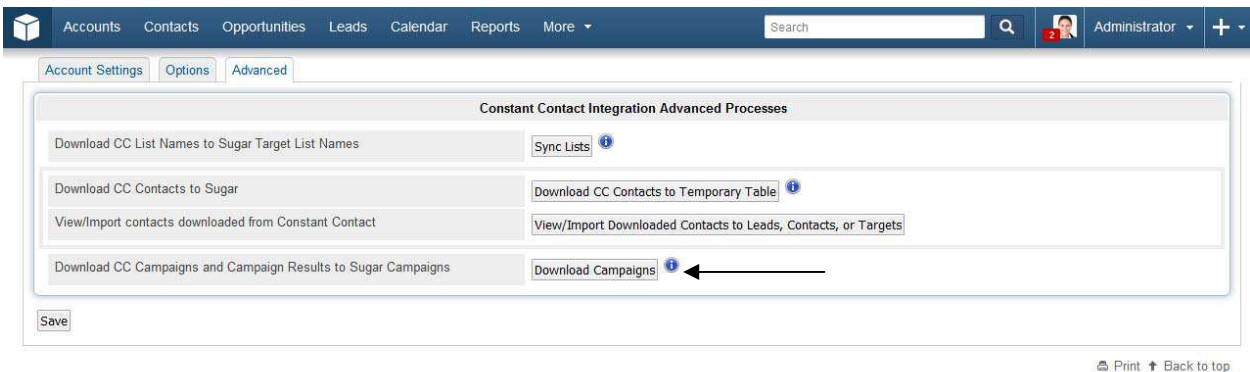
Manually Retrieving Constant Contact Information

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 right away. These processes are set to run on a scheduler automatically.

1. **Download Campaigns:**

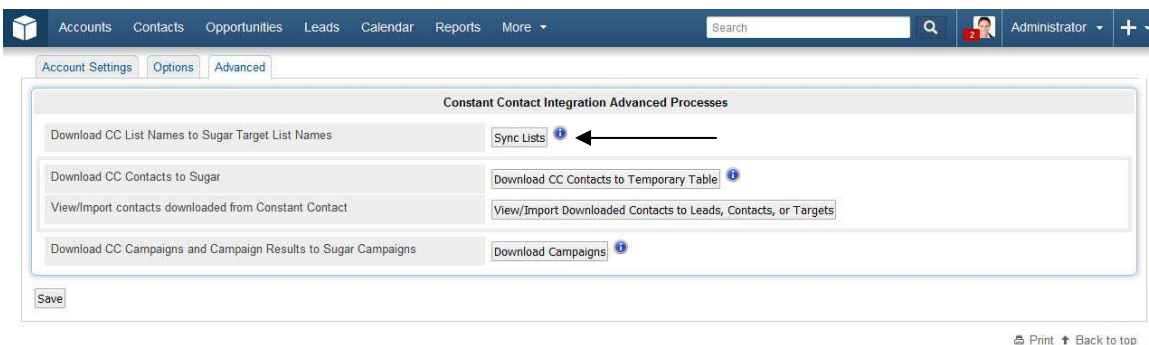
To retrieve all campaigns and campaign results from Constant Contact to SugarCRM, click the ‘Download Campaigns’ button (This may take 15-20 minutes). This will pull all campaign information from Constant Contact to SugarCRM (Opens, clicks, forwards, # of impressions, bounces etc.). You should only “Download 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:**

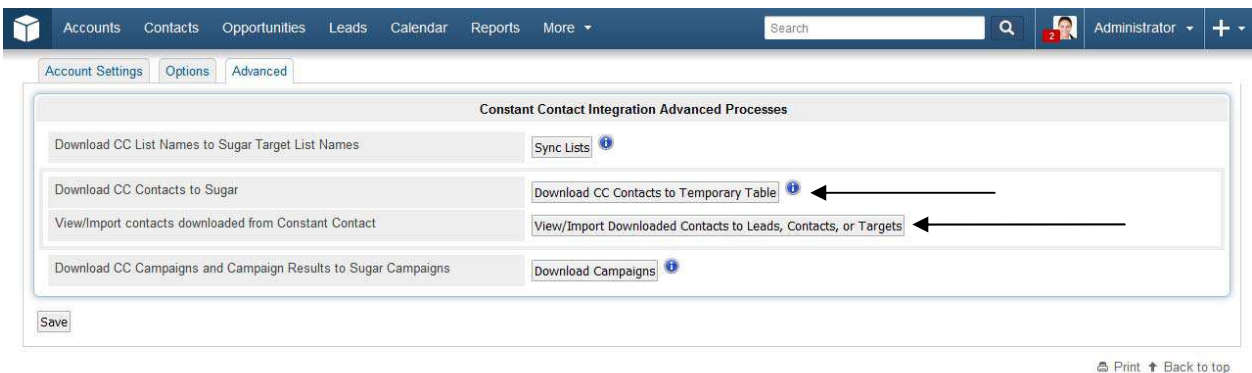
The next sets of processes are designed to allow you to update Sugar contacts and leads with data from Constant Contact. Please note that all of these processes will not be relevant for all users, and that they are handled via Scheduler automatically. These manual processes are only required for specific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



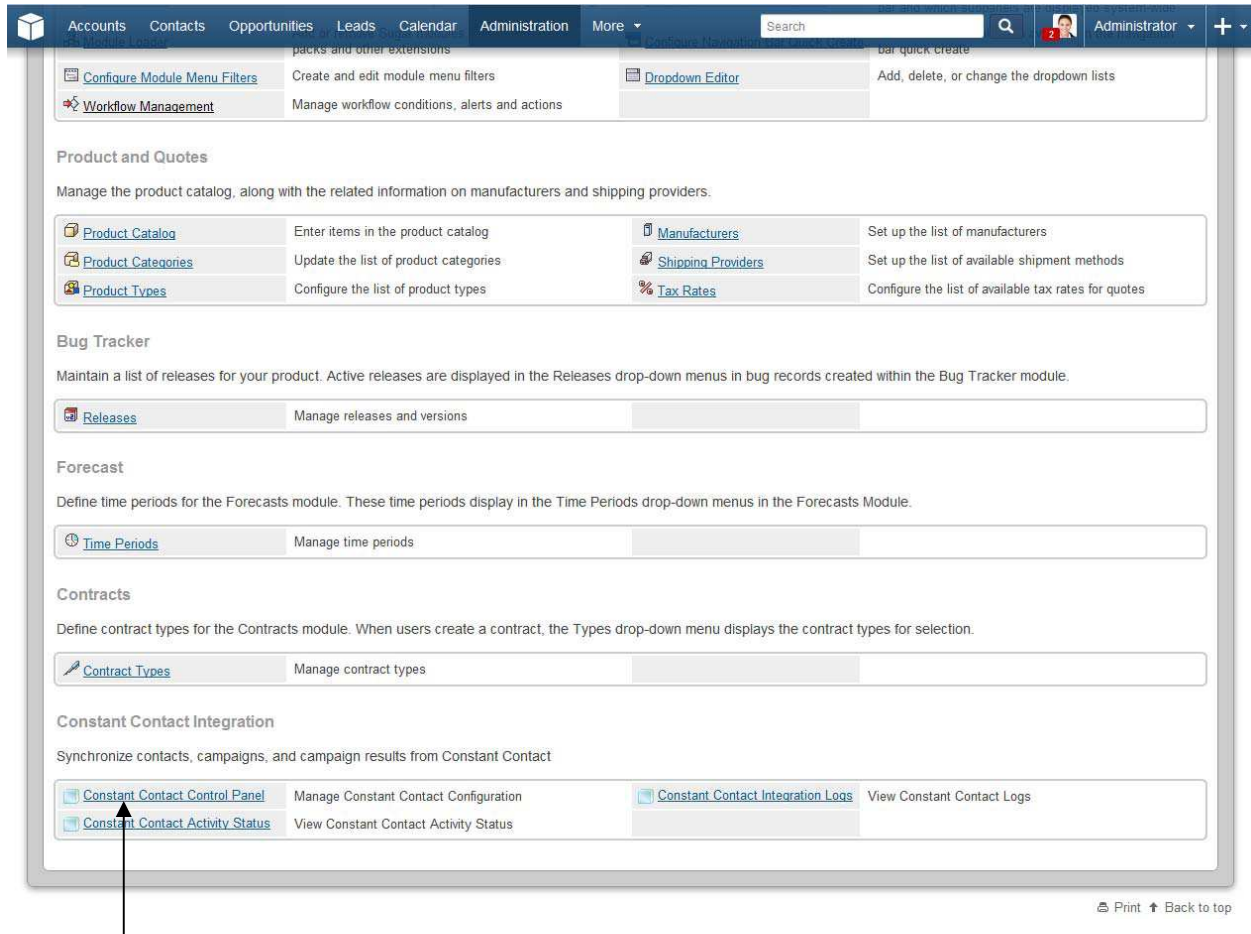
The next few pages provide detailed procedures relating to the processes above.

Manually Retrieving Constant Contact Information (continued)

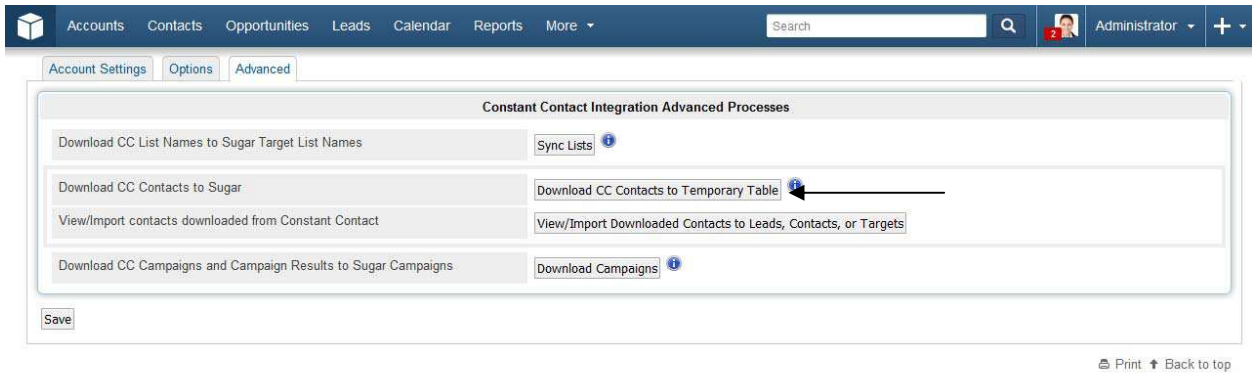
Download Contacts

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”.



Account Settings | Options | Advanced

Constant Contact Integration Advanced Processes

Download CC List Names to Sugar Target List Names | Sync Lists ⓘ

Download CC Contacts to Sugar | **Download CC Contacts to Temporary Table** ⓘ ←

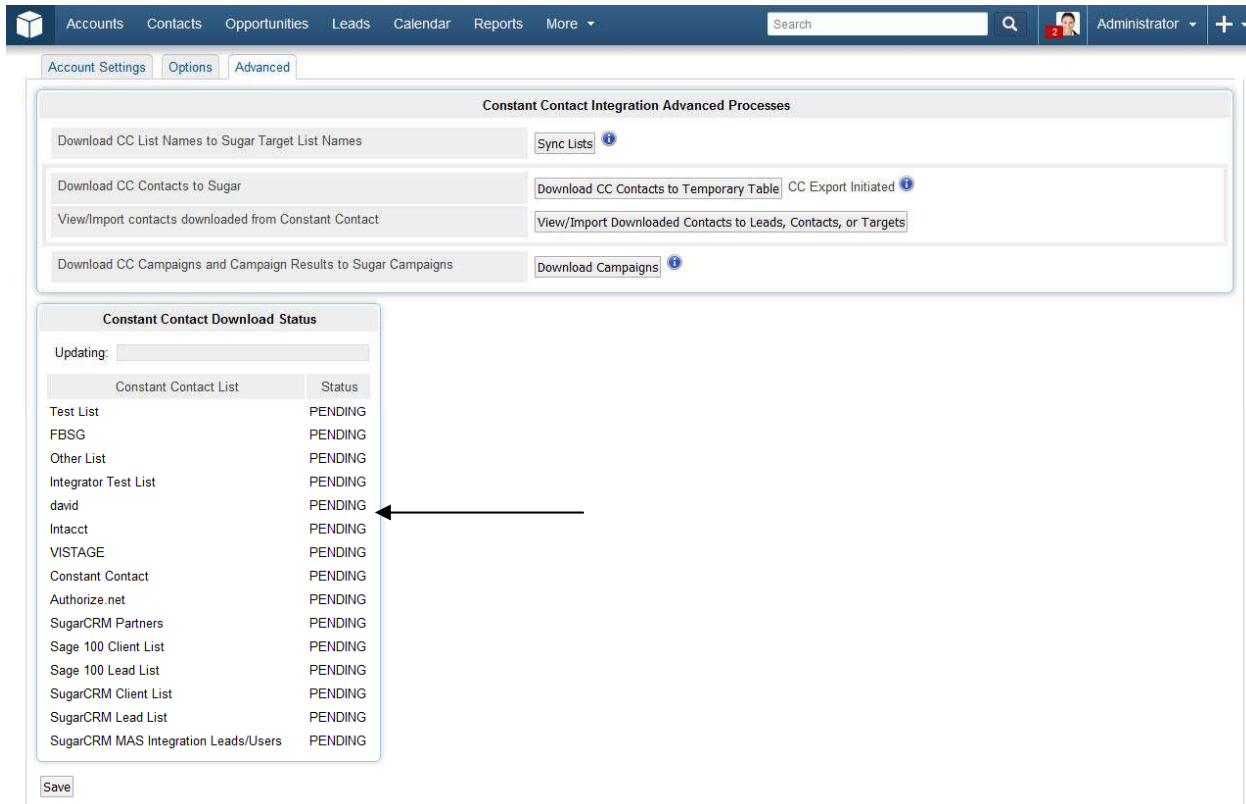
View/Import contacts downloaded from Constant Contact | View/Import Downloaded Contacts to Leads, Contacts, or Targets

Download CC Campaigns and Campaign Results to Sugar Campaigns | Download Campaigns ⓘ

Save

Print ↑ Back to top

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).



Account Settings | Options | Advanced

Constant Contact Integration Advanced Processes

Download CC List Names to Sugar Target List Names | Sync Lists ⓘ

Download CC Contacts to Sugar | **Download CC Contacts to Temporary Table** | CC Export Initiated ⓘ

View/Import contacts downloaded from Constant Contact | View/Import Downloaded Contacts to Leads, Contacts, or Targets

Download CC Campaigns and Campaign Results to Sugar Campaigns | Download Campaigns ⓘ

Constant Contact Download Status

Updating: _____

Constant Contact List	Status
Test List	PENDING
FBSG	PENDING
Other List	PENDING
Integrator Test List	PENDING
david	PENDING
Intacct	PENDING
VISTAGE	PENDING
Constant Contact	PENDING
Authorize.net	PENDING
SugarCRM Partners	PENDING
Sage 100 Client List	PENDING
Sage 100 Lead List	PENDING
SugarCRM Client List	PENDING
SugarCRM Lead List	PENDING
SugarCRM MAS Integration Leads/Users	PENDING

Save

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.

The screenshot shows the SugarCRM interface with the following elements:

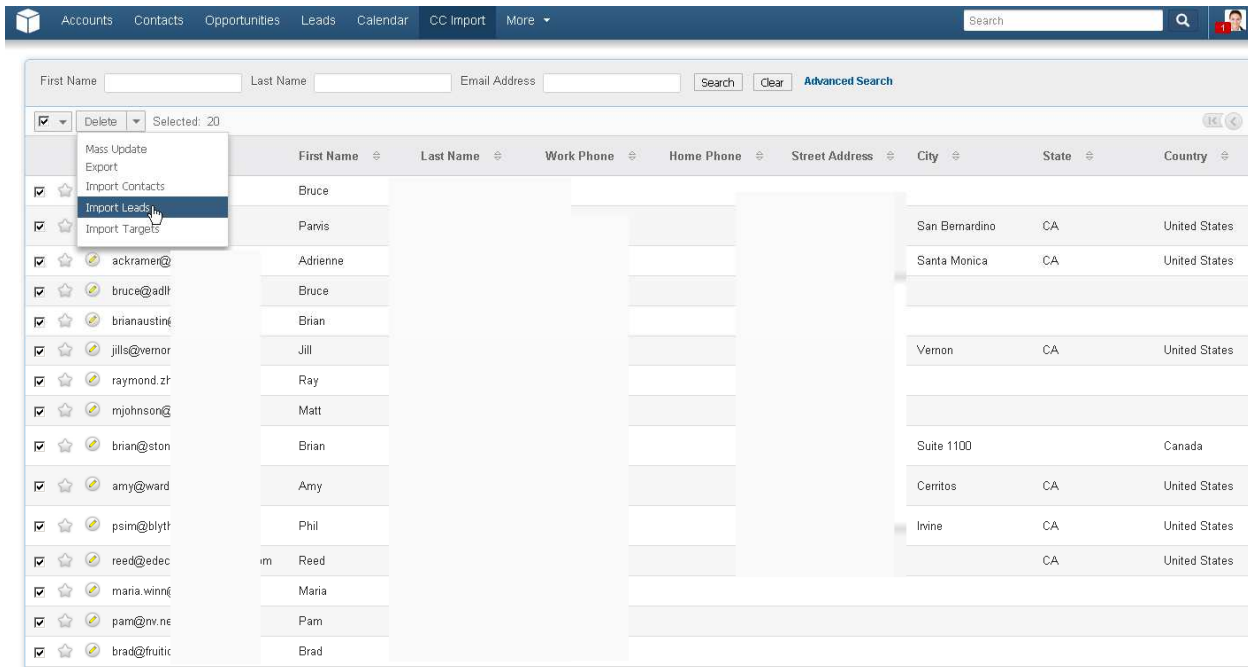
- Navigation Bar:** Accounts, Contacts, Opportunities, Leads, Calendar, Reports, More, Search, Administrator.
- Account Settings:** Options, Advanced.
- Constant Contact Integration Advanced Processes:**
 - Download CC List Names to Sugar Target List Names (Sync Lists)
 - Download CC Contacts to Sugar (Download CC Contacts to Temporary Table, CC Export Initiated)
 - View/Import contacts downloaded from Constant Contact (View/Import Downloaded Contacts to Leads, Contacts, or Targets) ←
 - Download CC Campaigns and Campaign Results to Sugar Campaigns (Download Campaigns)
- Constant Contact Download Status:**

Constant Contact List	Status
Test List	COMPLETE
FDGG	COMPLETE
	COMPLETE
	COMPLETE
	COMPLETE
	COMPLETE
	COMPLETE
	COMPLETE
	COMPLETE
	COMPLETE
	COMPLETE
	COMPLETE
- Buttons:** Save

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.



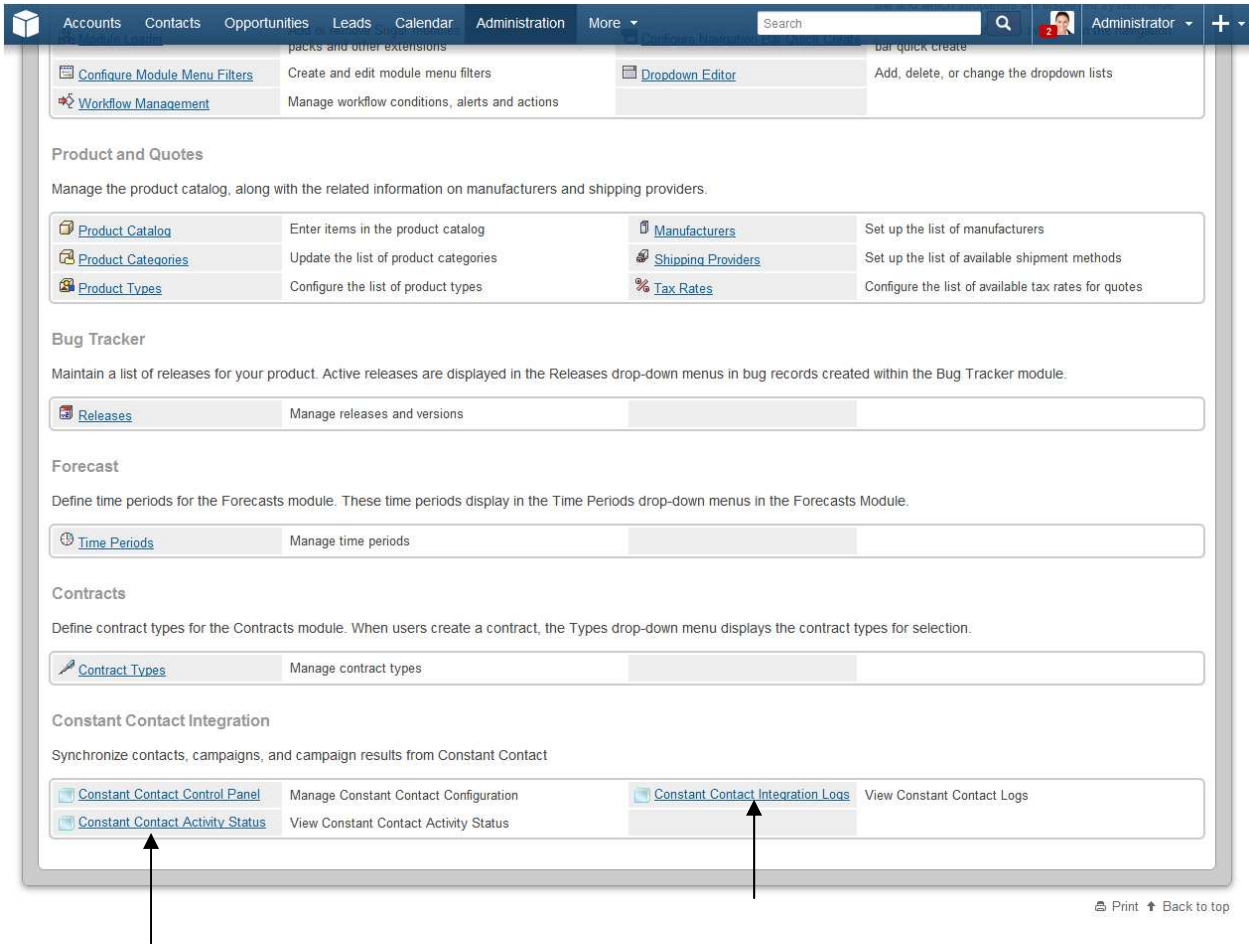
The screenshot shows the SugarCRM interface with a contact list. A context menu is open over the 'Import Leads' option. The contact list has the following columns: First Name, Last Name, Work Phone, Home Phone, Street Address, City, State, and Country. The list contains 15 contacts, each with a checkbox, a star icon, and an email address icon.

First Name	Last Name	Work Phone	Home Phone	Street Address	City	State	Country
Bruce							
Parvis				San Bernardino		CA	United States
Adrienne				Santa Monica		CA	United States
Jill				Vernon		CA	United States
Ray							
Matt							
Brian				Suite 1100			Canada
Amy				Cerritos		CA	United States
Phil				Irvine		CA	United States
Reed						CA	United States
Maria							
Pam							
Brad							

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

Manually Retrieving Constant Contact Information (continued)

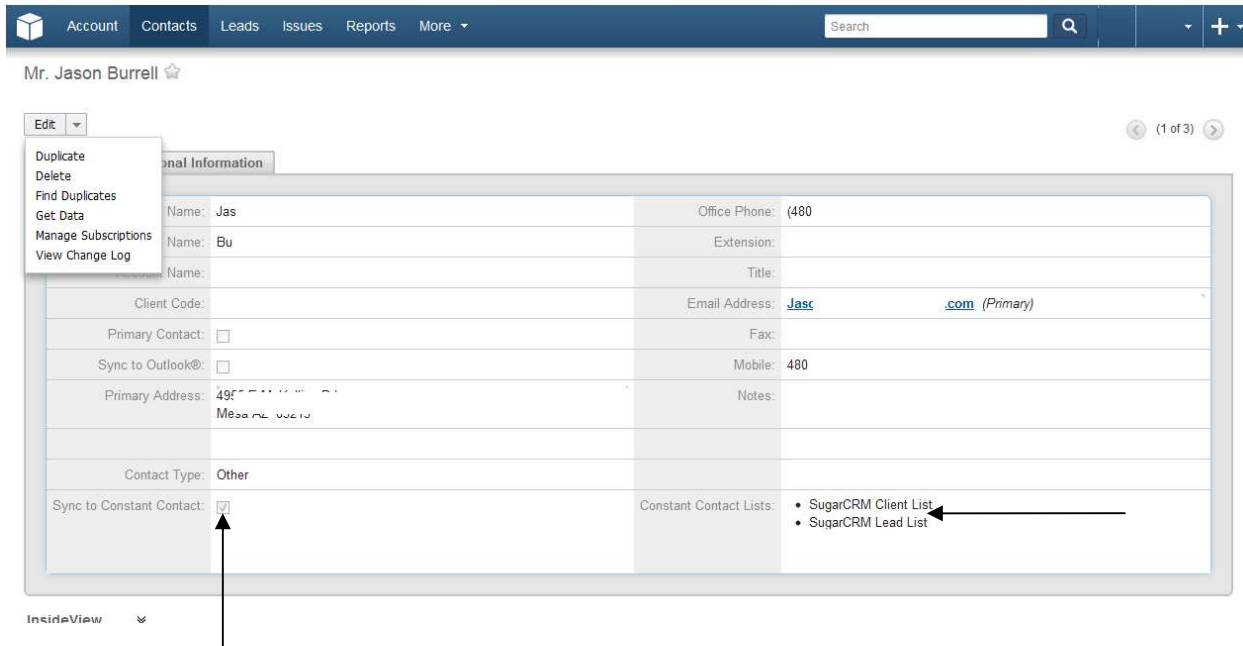
You can view the integration Activity Status and Integration Logs. These logs will keep records of how often processes are running. In addition, the logs will let you know what processes are succeeding and which are failing.



Upload Individual Contacts and Leads from Sugar to Constant Contact

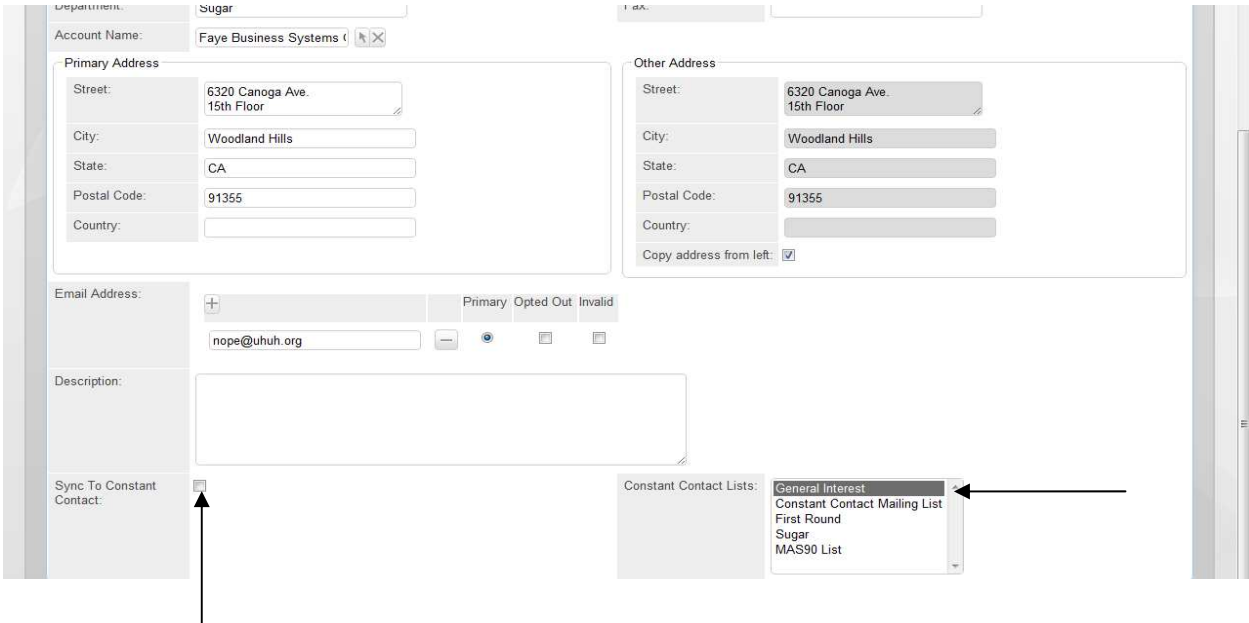
Uploading Leads and Contacts from SugarCRM to Constant Contact

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.

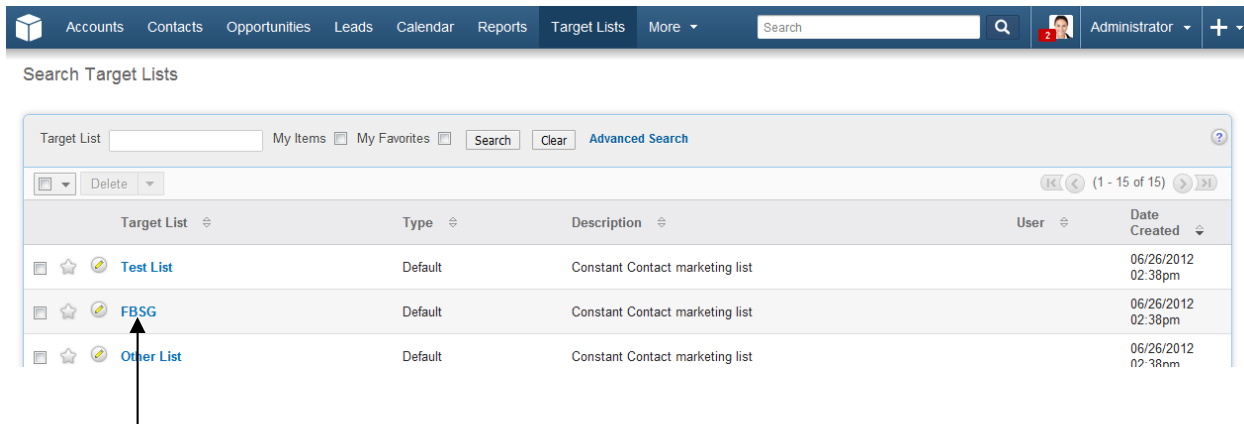
This feature will upload the following fields from SugarCRM to Constant Contact:

- 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

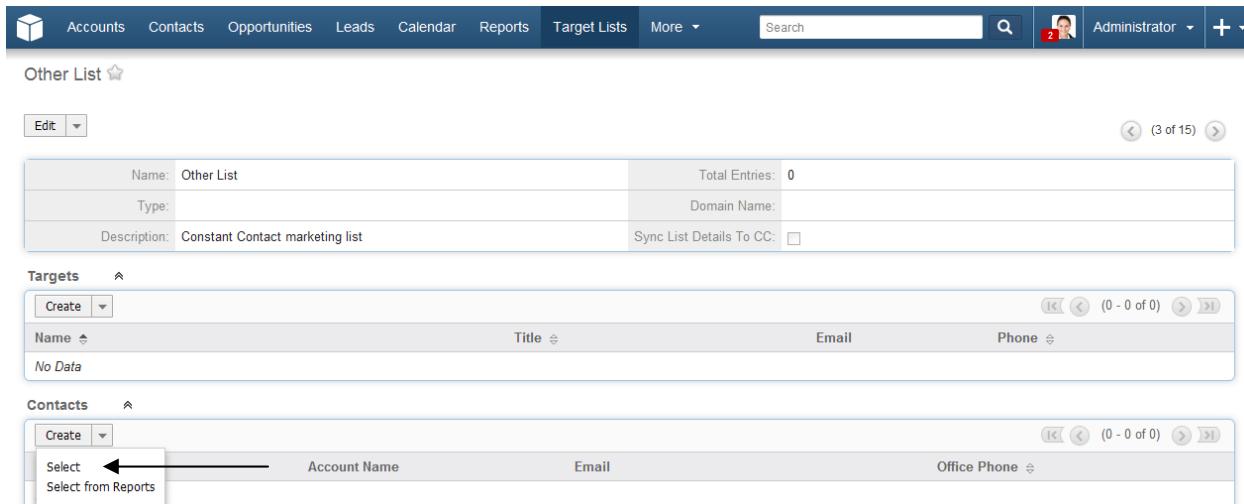
To set multiple contacts/leads to upload, you must first go to the “target lists” module, and click on an individual list to edit.



Search Target Lists

Target List	Type	Description	User	Date Created
Test List	Default	Constant Contact marketing list		06/26/2012 02:38pm
FBSG	Default	Constant Contact marketing list		06/26/2012 02:38pm
Other List	Default	Constant Contact marketing list		06/26/2012 02:38pm

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.



Other List

Edit (3 of 15)

Name: Other List	Total Entries: 0
Type:	Domain Name:
Description: Constant Contact marketing list	Sync List Details To CC: <input type="checkbox"/>

Targets (0 - 0 of 0)

Name	Title	Email	Phone
No Data			

Contacts (0 - 0 of 0)

Account Name	Email	Office Phone
<div style="border: 1px solid gray; padding: 2px;"> Select Select from Reports </div>		

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”.

Contact Search

First Name: Last Name:
 Account Name: Title:
 Lead Source: Campaign:
 Assigned to: (Dropdown menu open showing: David Faye, Demo Admin, Jake Buttikofer, Mark Gonzalez)

Search Clear

Create Contact
 Select ←

Contact List

<input type="checkbox"/>	Name	Account Name	Title	Lead Source
<input type="checkbox"/>	Mr. Dwight Creed			
<input type="checkbox"/>	Mr. Joseph Heron			
<input type="checkbox"/>	Mr. Tom Lewis			
<input type="checkbox"/>	Mr. Ron Artest			
<input type="checkbox"/>	Mr. Kobe Bryant			
<input type="checkbox"/>	Mr. Phil Jackson			
<input type="checkbox"/>	Mr. Isiah		Thomas	
<input type="checkbox"/>	Mr. Larry Bird			
<input type="checkbox"/>	Mr. David Faye			
<input type="checkbox"/>	Mr. Jake Buttikofer			
<input type="checkbox"/>	Mr. David Rosson			

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.)

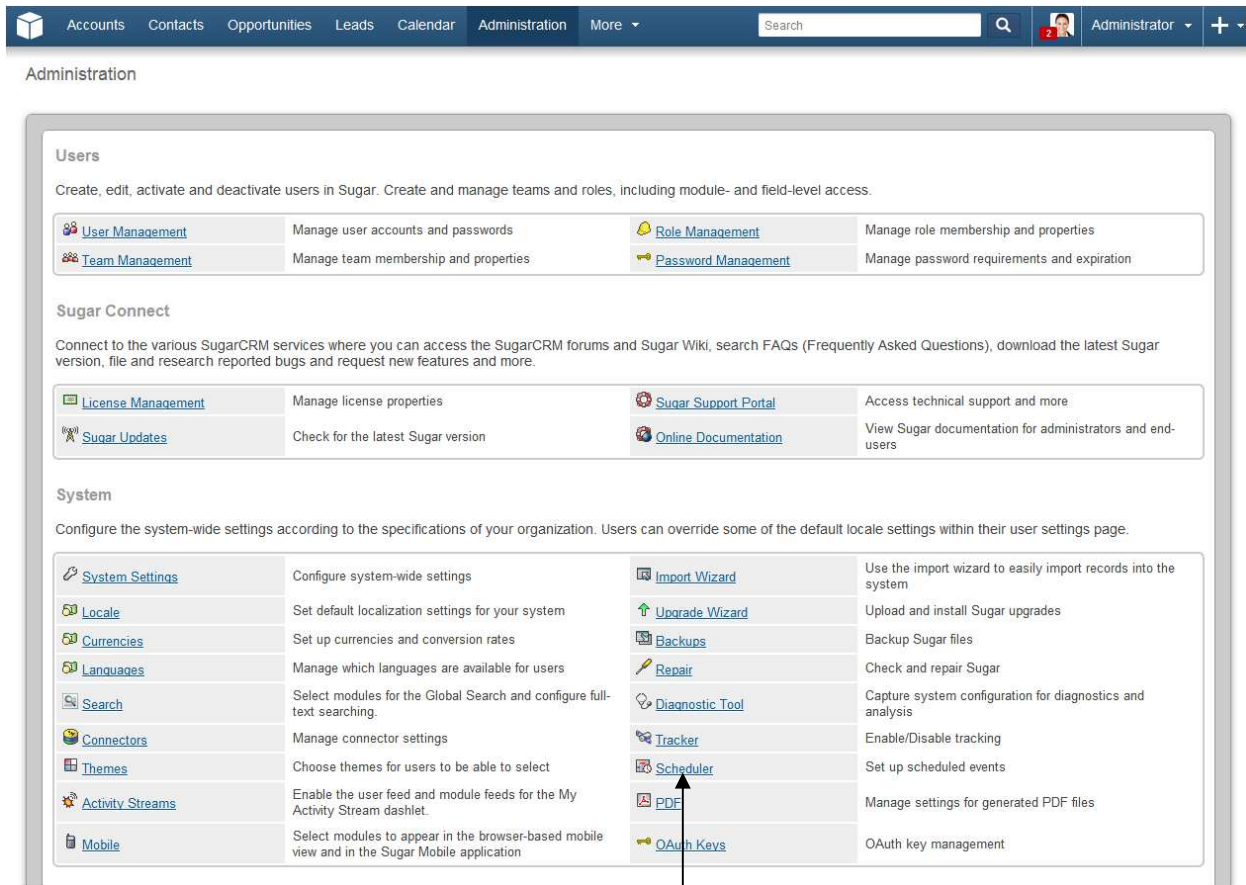
***Download CC data:** Schedule downloads of all constant contact's contact information (name, email address, phone # etc.) to be stored on a temporary table.

***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.

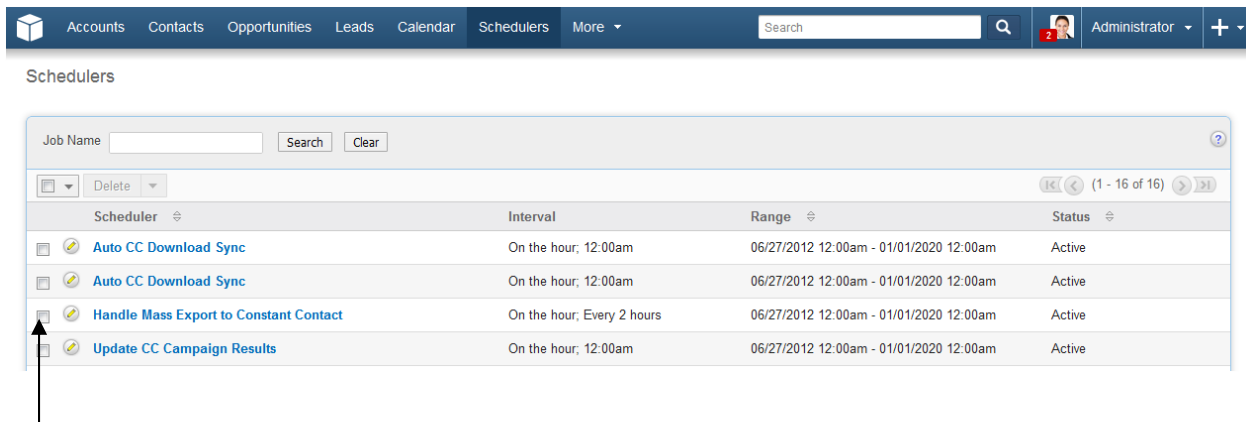
Accessing/Using the Scheduler to Manage Synchronization (continued)



The screenshot shows the SugarCRM Administration interface. The top navigation bar includes Accounts, Contacts, Opportunities, Leads, Calendar, Administration, and More. The Administration section is active, showing a search bar and a user profile for Administrator. Below the navigation bar, the Administration page is divided into three main sections: Users, Sugar Connect, and System. The System section is expanded, showing various system settings. The Scheduler option is highlighted with a black arrow pointing to it.

Section	Item	Description
Users	User Management	Manage user accounts and passwords
	Team Management	Manage team membership and properties
	Role Management	Manage role membership and properties
	Password Management	Manage password requirements and expiration
Sugar Connect	License Management	Manage license properties
	Sugar Updates	Check for the latest Sugar version
	Sugar Support Portal	Access technical support and more
	Online Documentation	View Sugar documentation for administrators and end-users
System	System Settings	Configure system-wide settings
	Locale	Set default localization settings for your system
	Currencies	Set up currencies and conversion rates
	Languages	Manage which languages are available for users
	Search	Select modules for the Global Search and configure full-text searching.
	Connectors	Manage connector settings
	Themes	Choose themes for users to be able to select
	Activity Streams	Enable the user feed and module feeds for the My Activity Stream dashlet.
	Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application
	Import Wizard	Use the import wizard to easily import records into the system
	Upgrade Wizard	Upload and install Sugar upgrades
	Backups	Backup Sugar files
	Repair	Check and repair Sugar
	Diagnostic Tool	Capture system configuration for diagnostics and analysis
Tracker	Enable/Disable tracking	
Scheduler	Set up scheduled events	
PDF	Manage settings for generated PDF files	
OAuth Keys	OAuth key management	

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

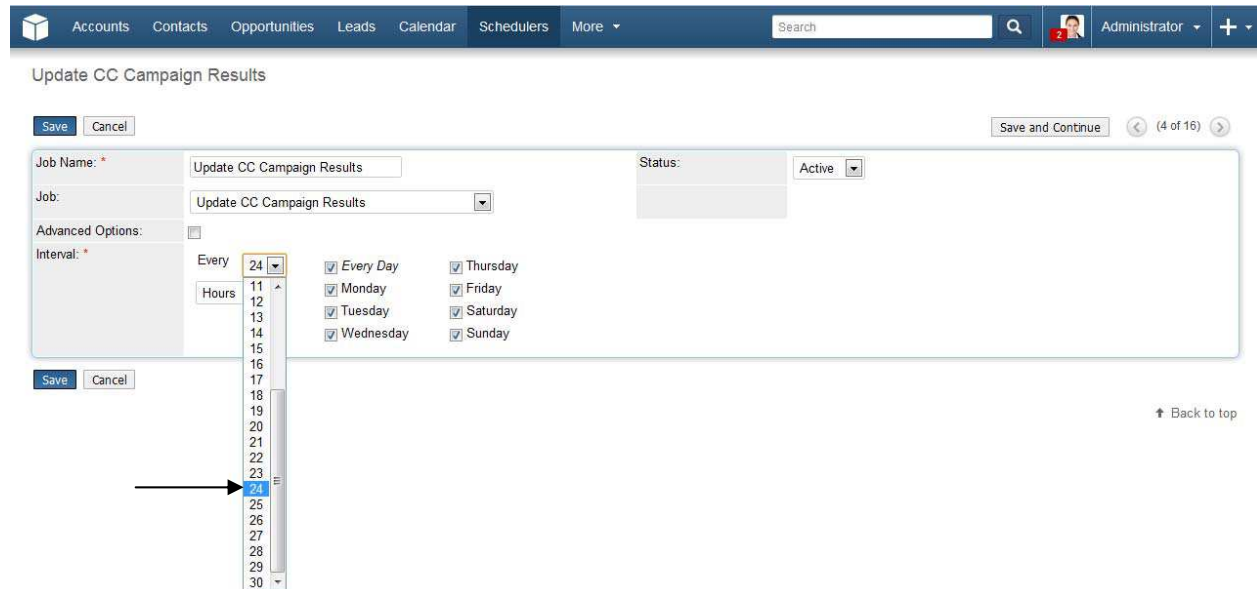


The screenshot shows the SugarCRM Schedulers interface. The top navigation bar includes Accounts, Contacts, Opportunities, Leads, Calendar, Schedulers, and More. The Schedulers section is active, showing a search bar and a user profile for Administrator. Below the navigation bar, the Schedulers page is displayed, showing a list of scheduled jobs. The Scheduler option is highlighted with a black arrow pointing to it.

Job Name	Interval	Range	Status
Auto CC Download Sync	On the hour, 12:00am	06/27/2012 12:00am - 01/01/2020 12:00am	Active
Auto CC Download Sync	On the hour, 12:00am	06/27/2012 12:00am - 01/01/2020 12:00am	Active
Handle Mass Export to Constant Contact	On the hour, Every 2 hours	06/27/2012 12:00am - 01/01/2020 12:00am	Active
Update CC Campaign Results	On the hour, 12:00am	06/27/2012 12:00am - 01/01/2020 12:00am	Active

[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.



The screenshot shows the SugarCRM scheduler interface for a job named "Update CC Campaign Results". The job is currently set to "Active" status. The "Interval" is set to "Every 24" hours, and the "Hours" dropdown menu is open, showing a list of hours from 11 to 30. An arrow points to the "24" option in the "Hours" list. The "Advanced Options" checkbox is checked, and the "Every" section is expanded to show a list of days with checkboxes: Every Day, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. All days are currently checked. The interface includes a navigation bar at the top with tabs for Accounts, Contacts, Opportunities, Leads, Calendar, Schedulers, and More. A search bar and user profile (Administrator) are also visible. The page title is "Update CC Campaign Results".

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.

The screenshot shows the SugarCRM interface for a campaign record. At the top, there is a navigation bar with tabs for Account, Contacts, Leads, Issues, Campaigns, and More. Below this is a search bar and a 'View Status' button. The main content area is titled 'SugarCRM Constant Contact Integration Updates' and includes an 'Overview' section with the following details:

- Name: SugarCRM Constant Contact Integration Updates
- Status: Complete
- Start Date: 05/31/2012
- Type: Email
- End Date: 05/31/2012
- Impressions: 775
- Bounces: 77
- Objective:
- Expected Revenue: (USD \$):
- Description: Constant Contact Campaign Status: Sent

Below the overview is an 'Other' section with 'Assigned to:' and 'Teams: FBSG'. There are also 'Target List' and 'Tracker URLs' sections. The 'Target List' section shows a table with one entry:

Target List	Description	Type	Targets in List
Constant Contact	Constant Contact marketing list	Default	274

The 'Tracker URLs' section shows a table with three entries:

Name	URL	Key
http://d2owqhe2x3j50.cloudfro	http://d2owqhe2x3j50.cloudfront.net/media.sugarcrm.com/12webcast/fbg/FBG-Constant_Contact_Integration_V2.mp4?utm_source=SugarCRM+Constant+Contact+Integration+Updates&utm_campaign=Authorize.net+Integration+Webinar&utm_medium=email	827
http://d2owqhe2x3j50.cloudfro	http://d2owqhe2x3j50.cloudfront.net/media.sugarcrm.com/12webcast/fbg/FBG-Constant_Contact_Integration_V2.mp4?utm_source=SugarCRM+Constant+Contact+Integration+Updates&utm_campaign=Constant+Contact+Update+&utm_medium=email	828
http://www.linkedin.com/compan	http://www.linkedin.com/company/684045?trk=cws-btn-overview-0-0	829

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

Account Contacts Leads Issues Campaigns More


SugarCRM Constant Contact Integration Updates

Delete Test Entries Launch Wizard View Details View ROI

Name	SugarCRM Constant Contact Integration Updates	Assigned to	
Status	Complete	Team	FBSG
Start Date	05/31/2012	Date Modified	06/25/2012 07:00am by Jaka
End Date	05/31/2012	Date Created	06/01/2012 06:32pm by wesc
Type	Email		
Budget (USD \$)		Actual Cost (USD \$)	
Expected Revenue (USD \$)		Expected Cost (USD \$)	
Objective			
Description	Constant Contact Campaign Data: Sent		

Filter Chart By: --None--

Campaign Response by Recipient Activity



Message Sent/Attempted

Recipient Name	Recipient Email	Marketing Id	Activity Type	Activity Date	Related	Hits
Jeanne Strand	jstrand@ARAUusa.com		Message Sent/Attempted	05/31/2012 07:00am		0
Ahmed Toyn	ahmed_toyn@hotmail.com		Message Sent/Attempted	05/31/2012 07:00am		0
Christian Watts	christian@city-eightseeng.us		Message Sent/Attempted	05/31/2012 07:00am		0
Jose Pena	jpg@toneoil.com		Message Sent/Attempted	05/31/2012 07:00am		0
Marc Castillo	marc.castillo@tratsports.com		Message Sent/Attempted	05/31/2012 07:00am		0
Mark LaBarge	mark@labargeco.com		Message Sent/Attempted	05/31/2012 07:00am		0
David Lewis	david@tdavidlewis.com		Message Sent/Attempted	05/31/2012 07:00am		0
Robert George	robert_george@ac.uscourts.gov		Message Sent/Attempted	05/31/2012 07:00am		0
Elin Payne	lpayne@eththeadx.com		Message Sent/Attempted	05/31/2012 07:00am		0
Tom Moore	tom@miocnc.com		Message Sent/Attempted	05/31/2012 07:00am		0

Viewed Message

Recipient Name	Recipient Email	Marketing Id	Activity Type	Activity Date	Related	Hits
Mike Molinar	mike.molinar@kactreate.com		Viewed Message	05/31/2012 07:00am		0
Jason Middleton	jason@orangeinleed.com		Viewed Message	05/31/2012 07:00am		0
Peter Serwe	peter.serwe@gmail.com		Viewed Message	05/31/2012 07:00am		0
Jeff Wetzal	jwetzal@outawack.com		Viewed Message	05/31/2012 07:00am		0

Click-thru Link

Recipient Name	Target Tracker Key	Recipient Email	Marketing Id	Activity Type	Activity Date	Related	Hits
Chen Carame		ccarame@yaf.org		Click-thru Link	05/31/2012 07:00am	http://d2w6h2x350.cloudfront.net/media.sugarcrm.com/12webcast/fbg/Constant>Contact_Integration_V2.mpg?utm_source=SugarCRM+Constant+Contact+Integration+Updates&utm_campaign=Constant+Contact+Update+&utm_medium=email	0
Armando Occione		amandocccione@hotmail.com		Click-thru Link	06/01/2012 07:00am	http://d2w6h2x350.cloudfront.net/media.sugarcrm.com/12webcast/fbg/Constant>Contact_Integration_V2.mpg?utm_source=SugarCRM+Constant+Contact+Integration+Updates&utm_campaign=Constant+Contact+Update+&utm_medium=email	0
David Faye		david.faye@fayebag.com		Click-thru Link	05/31/2012 07:00am	http://www.linkedin.com/company/584045?trk=cs-td-ownew-0-0	0
David Varela		dvarela@genproducts.com		Click-thru Link	05/31/2012 07:00am	http://www.linkedin.com/company/584045?trk=cs-td-ownew-0-0	0
Debra Elstad		delstad@centralpointsystems.com		Click-thru Link	05/31/2012 07:00am	http://d2w6h2x350.cloudfront.net/media.sugarcrm.com/12webcast/fbg/Constant>Contact_Integration_V2.mpg?utm_source=SugarCRM+Constant+Contact+Integration+Updates&utm_campaign=Constant+Contact+Update+&utm_medium=email	0
Francisco Unknown		francisco@admante.com		Click-thru Link	05/31/2012 07:00am	http://d2w6h2x350.cloudfront.net/media.sugarcrm.com/12webcast/fbg/Constant>Contact_Integration_V2.mpg?utm_source=SugarCRM+Constant+Contact+Integration+Updates&utm_campaign=Constant+Contact+Update+&utm_medium=email	0
Rick Armstrong		rick@newcastleflow.org.au		Click-thru Link	06/02/2012 07:00am	http://d2w6h2x350.cloudfront.net/media.sugarcrm.com/12webcast/fbg/Constant>Contact_Integration_V2.mpg?utm_source=SugarCRM+Constant+Contact+Integration+Updates&utm_campaign=Constant+Contact+Update+&utm_medium=email	0
Jason Middleton		jason@orangeinleed.com		Click-thru Link	06/11/2012 07:00am	http://d2w6h2x350.cloudfront.net/media.sugarcrm.com/12webcast/fbg/Constant>Contact_Integration_V2.mpg?utm_source=SugarCRM+Constant+Contact+Integration+Updates&utm_campaign=Constant+Contact+Update+&utm_medium=email	0

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.

Jake Buttikofer ☆

Edit ▾

Overview **Additional Information**

First Name:	Jake	Office Phone:	818-227-5130
Last Name:	Buttikofer	Extension:	5126
Account Name:	Faye Business Systems Group, Inc.	Title:	Sales Associate
Client Code:	Faye Business Systems Group	Email Address:	jake.buttikofer@fayebsg.com (Primary)
Primary Contact:	<input type="checkbox"/>	Fax:	
Sync to Outlook@:	<input type="checkbox"/>	Mobile:	
Primary Address:	6320 Canoga Avenue 15th Floor Woodland Hills CA 91367		Notes:
Contact Type:	Other		
Sync to Constant Contact:	<input checked="" type="checkbox"/>	Constant Contact Lists:	<ul style="list-style-type: none"> • FBSG • Constant Contact • Authorize.net • SugarCRM Client List • SugarCRM Lead List

InsideView ▾

Campaigns ▲

Campaign	Activity Type	Activity Date	Web Link
The Value of a CRM System for MAS Users and how to	Click-thru Link	06/06/2012 07:00am	https://fbsg.webex.com/fbsg/j.php?ED=200620512&UID=493526892&RT=MIM0&utm_source=The+Value+of+a+CRM+System+for+MAS+Users+and+how+to+integrate+the+two&utm_campaign=S
The Value of a CRM System for MAS Users and how to	Viewed Message	06/06/2012 07:00am	

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