SugarCRM - Constant Contact



Integration

Operations Nanual

Created by







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Compatibilities

This software is currently compatible with:

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

Contact Us

Email:	info@fayebsg.com
Web:	www.fayebsg.com
Voice:	818-227-5130
Fax:	818-227-5099
Snail:	6320 Canoga Avenue, 15 th Floor
	WOOUIAHU HIIIS, CA 91307





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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.'

Email Settings	Configure email settings	Pinbound Email	Set up group mail accounts for monitoring inbound email and manage personal inbound mail account information for users				
Campaign Email Settings	Configure email settings for campaigns	Email Queue	Manage the outbound email queue				
Email Archiving	Enable/disable the Sugar Email Archiving Service						
create and edit modules and modu	le layouts, manage standard and custom fields and con Customize module fields, layouts and relationships	nfigure tabs.	Change the names of the modules appearing within the application				
Module Builder	Build new modules to expand the functionality of Sugar	Display Modules and Subpanels	Choose which modules are displayed in the navigatic bar and which subpanels are displayed system-wide				
Module Loader	Add or remove Sugar modules, themes, language packs and other extensions	Configure Navigation Bar Quick Create	Select which modules are available in the navigation bar quick create				
Configure Module Menu Filters	Create and edit module menu filters	Dropdown Editor	Add, delete, or change the dropdown lists				
Norkflow Management	Manage workflow conditions, alerts and actions						
Product and Quotes	with the related information on manufacturers and ship	ping providers.					
Produc <mark>t and Quotes</mark> fanage the product catalog, along Product Catalog	with the related information on manufacturers and ship Enter items in the product catalog	pping providers.	Set up the list of manufacturers				
Product and Quotes Aanage the product catalog, along Product Catalog Product Catagories	with the related information on manufacturers and ship Enter items in the product catalog Update the list of product categories	pping providers.	Set up the list of manufacturers Set up the list of available shipment methods				





Procedures – Installation (Continued)

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

Ŷ	Accounts	Contacts	Opportunities	Leads	Calendar	Administration	More 👻		Search		٩	2	Administrator 👻	+ -
Mod	lule Loade	r												
The fo	llowing extensi	ons are insta	lled on this system:											
	Name	\$ I	Action	Ena	able/Disable		Туре	Version		Date Installed		De	escription	0
4														-
Moo	iule Choose	File No file	chosen		Upload	<u> </u>	-							
	-			8										
					<u>.</u>									

5. Click 'Install,' to proceed.

llowing extensions are install	ed on this s	system:	Enable/Disable	т	Varsion	Date	heliat	De	ecription
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))
ule Choose File No file	chosen		Upload						
				Type	Version	Date Published	Uninstallable	Des	cription
Name	4	Install	Delete	1900					
Name r-Constant Contact Integratio	÷	Install Install	Delete Delete Package	Module	2.0.1	2012-06-14	Yes	SugarCR <mark>M</mark> - Cons	tant Contact Integratio
Name r-Constant Contact Integratio	n	Install Install	Delete Delete Package	Module	2.0.1	2012-06-14	Yes	SugarCRM - Cons	tant Contact Integration
Name -Constant Contact Integratio	÷	Install	Delete Delete Package	Module	2.0.1	2012-06-14	Yes	SugarCRM - Cons	tant Contact Integratio
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Name ar-Constant Contact Integratio	e n	Install	Delete Delete Package	Module	2.0.1	2012-06-14	Yes	SugarCRM - Cons	tant Contact Integra





Procedures - Installation (Continued)

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



7. The module will install.

Ŷ	Accounts	Contacts	Opportunities	Leads	Calendar	Administration	More -	Search	٩	Administrator +	+ •
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Ba	ck to Module Lo	ader									
										& Print + Back t	o top



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Procedures - Installation (Continued)

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

Accounts Contacts O	pportunities Leads Calendar Administration More	e 👻 Search	Q 2 Administrator -				
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cerc							
este edit activate and dea	stiluate users in Sugar. Create and manage teams and relea	including module, and field lovel	20000				
eate, euit, activate and dea	ictivate users in ougar. Create and manage teams and roles,	including module- and field-level	auces				
User Management	Manage user accounts and passwords	Role Management	Manage role membership and properties				
⁸⁸ Team Management	Manage team membership and properties	Reserved Management	Manage password requirements and expiration				
ugar Connect							
onnect to the various Sugar	CRM services where you can access the SugarCRM forums	and Sugar Wiki, search FAQs (Fr	equently Asked Questions), download the latest Sugar				
ersion, file and research rep	orted bugs and request new features and more.						
Iccense Management	Manage license properties	Sugar Support Portal	Access technical support and more				
X [®] <u>Sugar Updates</u>	Check for the latest Sugar version	Online Documentation	View Sugar documentation for administrators and end- users				
system							
configure the system-wide se	ttings according to the specifications of your organization. Us	ers can override some of the defa	ault locale settings within their user settings page.				
System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system				
50 Locale	Set default localization settings for your system	1 Upgrade Wizard	Upload and install Sugar upgrades				
59 <u>Currencies</u>	Set up currencies and conversion rates	Backups	Backup Sugar files				
50 Languages	Manage which languages are available for users	P Repair	Check and repair Sugar				
Search	Select modules for the Global Search and configure full- text searching.	Diagnostic Tool	Capture system configuration for diagnostics and analysis				
Connectors	Manage connector settings	Se Tracker	Enable/Disable tracking				
E Themes	Choose themes for users to be able to select	Scheduler	Set up scheduled events				
Activity Streams	Enable the user feed and module feeds for the My Activity Stream dashlet.	PDF	Manage settings for generated PDF files				
Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application	Math Keys	OAuth key management				





Procedures - Installation (Continued)

9. Click 'Quick Repair and Rebuild'.

Accounts Contacts Oppo	rtunities Leads Calendar Administration More • Search 🔍 🙀 Administrator • •
Repair	
P Quick Repair and Rebuild	Repairs and rebuilds DB, Extensions, Vardefs, Sugar Dashlets etc.
1 Upgrade Tea s	Creates teams for users
Expand Column Width	Expands certain char, varchar and text columns in database (MSSQL ONLY)
A Rebuild .htaccess File	Rebuilds Intaccess to limit access to certain files directly
A Rebuild Config File	Rebuilds config.php by updating version and adding defaults when not explicitly declared
A Rebuild Sugar Logic Functions	Rebuilds Sugar Logic functions cache
A Rebuild Relationships	Rebuilds relationship metadata and drops the cache file
Rebuild Schedulers	Rebuilds out-of-the-box Scheduler Jobs
A Rebuild Sugar Dashlets	Rebuilds the Sugar Dashlets cache file
A Rebuild WorkFlow	Rebuilds the workflow cache & compile plugins after you re-install, drop tables or install a new workflow plugin
A Rebuild Javascript Languages	Rebuilds javascript versions of language files
A Rebuild JS Compressed Files	Copies original Full JS Source files and replaces existing compressed JS files
A Rebuild JS Grouping Files	Re-concatenates and overwrites existing group files with latest versions of group files
Main Contract Antipied JS Files	Copies original Full JS Source Files and minifies them, then replaces existing compressed files
A Rebuild Sprites	Rebuilds the sprite images and configuration files
P 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
🔎 <u>Repair Teams</u>	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
P Repair Activities	Repairs Activities (Calls, Meetings) end dates
P 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.'

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58 · · · · · · · · · · · · · · · · · · ·	
Herences found hotwoon distatase and varilets	
a following script will sens the dalabase structure with the structure defined in the vandels. You have the option of exporting this script and then running if against your dalabase using external database management tools, or to allow the administration module to run the script.	
TE: any changes you make to the script in the testbox will be reflected in the exported or executed code.	
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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	Q	Administrator 👻	+ •
Audit table for Contra	acts already exis	sts. skipping								
Team not Audit Enab	oled									
TeamMembership n	ot Audit Enable	d								
TeamSet not Audit E	nabled									
TeamSetModule not	Audit Enabled.	-								
TeamNotices not Au	dit Enabled									
ProductTemplate no	t Audit Enabled									
ProductType not Aud	lit Enabled									
ProductCategory not	Audit Enabled.									
Manufacturer not Aut	a eksedu eviste	akinnina								
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Shipper not Audit En	abled									
TaxRate not Audit En	abled									
TimePeriod not Audi	t Enabled									
Forecast not Audit Er	nabled									
ForecastSchedule n	ot Audit Enable	d								
ForecastOpportunitie	es not Audit Ena	abled								
Quota not Audit Enat	bled									
Worksheet not Audit	Enabled									
WorkFlow not Audit E	Enabled	1930-19								
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SessionManager no	t Audit Enabled									
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KBDocumentRevisio	on not Audit Ena	abled								
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KBDocumentKBTag	not Audit Enabl	led								
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ContractType not Au	dit Enabled									
ProjectResource not	Audit Enabled.									
Holiday not Audit Ena	abled									
Audit table for Notific	chabled	voviete ekinning								
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OAuthToken not Aud	it Enabled									
SugarFavorites not A	udit Enabled									
Audit table for fbsg_(ConstantConta	ctintegrations alread	ly exists. sk	ipping						
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csync_cc_sync_activ	vities not Audit E	Enabled								
Audit table for fbsg_(CCIErrorss alre	ady exists. skipping								
Audit table for fbsg_(CIActivityError	ss already exists, sk	apping							
Audit table for fbsg_0	UCIActivitiess a	uready exists, skippi	ng							
Done -										
Database tables a	ire synced wi	th vardets		-						

Return to Administration page

A 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'.

Accounts Contacts Opportunitie	s Leads Calendar Administration More -		Search					
Product Catalog	Enter items in the product catalog	Manufacturers	Set up the list of manufacturers					
2 Product Categories	Update the list of product categories	Shipping Providers	Set up the list of available shipment metho					
Product Types	Configure the list of product types	36 Tax Rates	Configure the list of available tax rates for quo					
ug Tracker								
aintain a list of releases for your produ	ict. Active releases are displayed in the Releases drop-down m	enus in bug records created within the Bug Tracker mo	dule.					
Releases	Manage releases and versions							
orecast								
ofina tima pariada far tha Faranasta m	adula TINes time periode display in the Time Bariade drap day	in monute in the Enrocente Medule						
enne une penous loi une norecasis inc	Judie. These time pendus display in the Time Pendus drop-dow	in menus in the Porecasts Module.						
D <u>Time Periods</u>	Manage time periods							
ontracts								
efine contract types for the Contracts r	module. When users create a contract, the Types dron-down m	enu displays the contract types for selection						
	Manual Andreas and a constant, and Types and plant in							
Contract Types	manage contract types							
onstant Contact Integration								
	ampaion results from Constant Contact							
vnenrunize cuntacts, campaiuris, anu c								
vinchronize contacts, campaigns, and c			Mow Longtont Lontact Long					
Constant Contacts, campaigns, and c	Manage Constant Contact Configuration	Constant Contact Integration Logs	view curistant contact Logs					

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

Accounts Co	ntacts Opportunities	Leads	Calendar	Reports	More 👻	Seärch	Q	2	Administrator -	+ -
Add Constant Contac	t Account									
User Name:										
Password:		•								
Product Key:		•								
Add Account		4								
Verify an Accou	nt Laccount option the upperior	me and pace	word of the acco	ount into the h	ovac shove					
ro milia constant contac	account, enter the usernar	ne and passi	word or the door	Juni and alle p	uxes audve:				a Print 🕈 Back to	o top





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.

				Ca	onstant Contact	Integration Option	15		
Default Lead So	urce for Impo	rted Leads				•			
Automatically S	ync all CC co	ontacts to Sugar		1	Enable 🕕				

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.

	Constant Contact Integration Options
Default Lead Source for Imported Leads $>$	
Automatically Sync all CC contacts to Sugar	🖂 Enable 📵 ┥
Default destination for automatically imported CC contacts	Contacts C Leads C Targets





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".

Accounts Contacts Opportunities Leads Calendar Reports	Target Lists	More 🝷	
Search Target Lists	Actions		Recently Viewed
	Create Target Li	st	Other List
	View Target List	ts	Sage 100 Client List
my items i my ravontes i Search			Constant Contact
Delete 💌			FBSG
Target List ⇔ Type ↔	2		Test 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.

Save Cancel			
Name: *		Туре: *	Default
Description:			
Sync List Details To CC:			
Other			
Assigned to:	Administrator		
Save Cancel			





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.

Accounts Contacts Opportunities Leads Calendar	Reports	More 👻	Search	٩	2	Administrator -	+ -
Account Settings Options Advanced							
	Constan	t Contact Integration Ad	vanced 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 t	o top

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).

Co	onstant 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





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
-------------	----------

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.

Accounts Contacts Opportunities Leads Calendar Repor	s More - Search Q 🔐 Administrator - 🕂
Account Settings Options Advanced	
Cons	tant Contact Integration Advanced Processes
Download CC List Names to Sugar Target List Names	Sync Lists 0
Download CC Contacts to Sugar	Download CC Contacts to Temporary Table 0
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	
	A Drint + Back to too

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 \rightarrow Constant Contact Control Panel.

Norkflow Management	Create and edit module menu filters Manage workflow conditions, alerts and actions	Dropdown Editor	Add, delete, or change the dropdown lists
Product and Quotes	with the related information on manufacturers and	shipping providers.	
Product Catalog	Enter items in the product catalog	D Manufacturers	Set up the list of manufacturers
Product Categories	Update the list of product categories	Shipping Providers	Set up the list of available shipment methods
Product Types	Configure the list of product types	% Tax Rates	Configure the list of available tax rates for quotes
orecast			
orecast			
Forecast Define time periods for the Forecast	ts module. These time periods display in the Time	Periods drop-down menus in the Forecasts	s Module.
Forecast Define time periods for the Forecast Time Periods	ts module. These time periods display in the Time Manage time periods	Periods drop-down menus in the Forecasts	s Module.
Forecast Define time periods for the Forecast Time Periods Contracts Define contract types for the Contra Contract Types	ts module. These time periods display in the Time Manage time periods acts module. When users create a contract, the Ty Manage contract types	Periods drop-down menus in the Forecasts	s Module. types for selection.
Forecast Define time periods for the Forecasi Time Periods Contracts Define contract types for the Contra <u>Contract Types</u> Constant Contact Integration Synchronize contacts, campaigns, a	ts module. These time periods display in the Time Manage time periods acts module. When users create a contract, the Ty Manage contract types and campaign results from Constant Contact	Periods drop-down menus in the Forecasts	: Module. types for selection.
Forecast Define time periods for the Forecasi Time Periods Contracts Define contract types for the Contra Constant Contact Integration Constant Contact Integration Constant Contacts, campaigns, a	ts module. These time periods display in the Time Manage time periods acts module. When users create a contract, the Ty Manage contract types and campaign results from Constant Contact Manage Constant Contact Configuration	Periods drop-down menus in the Forecasts pes drop-down menu displays the contract	s Module. types for selection.
Forecast Define time periods for the Forecasi Time Periods Contracts Define contract types for the Contra Contract Types Constant Contact Integration ynchronize contacts, campaigns, a Constant Contact Control Panel Constant Contact Activity Status	ts module. These time periods display in the Time Manage time periods acts module. When users create a contract, the Ty Manage contract types and campaign results from Constant Contact Manage Constant Contact Configuration View Constant Contact Activity Status	Periods drop-down menus in the Forecasts pes drop-down menu displays the contract Constant Contact Integration Logs	s Module. types for selection.





You now must select "Download contacts".

	onstant Contact Integration Advanced Processes
Download CC List Names to Sugar Target List Names	Sync Lists 0
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 0

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						
		Consta	nt Contact Integration Ad	vanced Processes		
Download CC List Names to Sugar Target	List Names		Sync Lists 0			
Download CC Contacts to Sugar			Download CC Contacts to	Temporary Table CC Export Initiated 0		
View/Import contacts downloaded from Co	instant Contact		View/Import Downloaded	Contacts to Leads, Contacts, or Targets		
Download CC Campaigns and Campaign F	Results to Sugar Campaigns		Download Campaigns			
Constant Contact Download Sta	atus					
Updating:						
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Fest List	PENDING					
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Other List	PENDING					
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ntacct	PENDING					
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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					





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.

Constant Contact Integration Advanced Processes Download CC List Names Sync Lists Image: Colspan="2">Constant Contact Integration Advanced Processes Download CC Contacts to Sugar Download CC Contacts to Temporary Table CC Export Initiated Image: Colspan="2">CC Export Initiated Download CC Contacts to Sugar Download CC Contacts to Temporary Table CC Export Initiated Image: Colspan="2">CC Export Initiated Download CC Campaigns and Campaign Results to Sugar Campaigns Download Campaigns Image: Colspan="2">Image: Constant Contact List Constant Contact List Status Status Image: Colspan="2">Completing COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	
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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 Image: Constant Contact Download Status Constant Contact List Status Status Constant Contact List Status Constant Contact List COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	ح ـــــــــ
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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.

Accounts Contacts Op	oportunities Leads Calenda	r CC Import More	۲			Search		Q 🔐
First Name	Last Name	Email Address		Search	Clear Advanced Search			
✓ ▼ Delete ▼ Selected: 20	L							(K)
Mass Update Export	First Name 🗦	Last Name \ominus	Work Phone $\ \oplus$	Home Phone	⊖ Street Address ⊕	City 🕀	State 🕀	Country 🕀
💌 🍲 Import Contacts	Bruce							
Import Leads	Parvis					San Bernardino	CA	United States
🔽 🏠 🧭 ackramen@	Adrienne					Santa Monica	CA	United States
🔽 🏠 🧭 bruce@adlf	Bruce							
🔽 🏠 🧭 brianaustin(Brian							
💌 🏫 🧭 jills@vernor	Jill					Vernon	CA	United States
💌 🏫 🧭 raymond.zh	Ray							
🔽 🏠 🧭 mjohnson@	Matt							
💌 🏠 🧭 brian@ston	Brian					Suite 1100		Canada
🔽 🎡 🧭 amy@ward	Amy					Cerritos	CA	United States
💌 🏫 🧭 psim@blytł	Phil					Irvine	CA	United States
🔽 🏠 🧭 reed@edec	m Reed						CA	United States
💌 🏫 🧭 maria.winn(Maria							
🔽 🎡 🧭 pam@nv.ne	Pam							
💌 🏫 🧭 brad@fruitic	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.

	Constant of the second statement of the second		Add dates to be an decident for
Configure Module Menu Filters	Create and edit module menu filters	Dropdown Editor	Add, delete, or change the dropdown lists
☆ Workflow Management	Manage workflow conditions, alerts and actions		
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roduct and Quotes			
anage the product catalog, along	with the related information on manufacturers and	shipping providers.	
Product Catalog	Enter items in the product catalog	Manufacturers	Set up the list of manufacturers
Product Categories	Update the list of product categories	Shipping Providers	Set up the list of available shipment methods
Product Types	Configure the list of product types	% Tax Rates	Configure the list of available tax rates for quotes
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🖨 Print 🕈 Back to top





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.

r. Jason Burrell	21					
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ind Duplicates iet Data	Name:	Jas	Office Phone	e: (480		
nage Subscriptions	Name:	Bu	Extension			
lew change Log	Name:		Title			
Clier	nt Code:		Email Address.	Jasc .com (Primary)	2	
Primary (Contact:		Fax			
Sync to Ou	utlook®:		Mobile:	480		
Primary A	Address:	495 THE WALL	. Notes:			
Conta	ct Type:	Other				
Sync to Constant (Contact:		Constant Contact Lists:	SugarCRM Client List SugarCRM Lead List		





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).

	Faye Business Systems (
Primary Address		Other Address	
Street:	6320 Canoga Ave. 15th Floor	Street:	6320 Canoga Ave. 15th Floor
City:	Woodland Hills	City:	Woodland Hills
State:	CA	State:	CA
Postal Code:	91355	Postal Code:	91355
Country:		Country:	
		Copy address from	left: 🔽
	+ nope@uhuh.org	Primary Opted Out Invalid	
Description:			
		ĥ	

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.

Ŷ	Account	s Contacts	Opportunities	Leads	Calendar	Reports	Target Lists	More 👻	Search	٩	2	Administrator 👻	+ -
Sea	arch Targ	jet Lists											
Т	arget List		My Items	s 🔲 My F	avorites 🔲	Search	Clear Advance	ed Search					?
	🛛 🔻 Delet	te 💌									1< <	(1 - 15 of 15) 🕥 🛐	>1)
		Target List ≑			Type		Descriptio	n 🔤		Us	ser 🕀	Date Created ♀	÷
	☆ ⊘	Test List			Default		Constant C	Contact marketing li	st			06/26/2012 02:38pm	
	☆ ⊘	FBSG			Default		Constant C	Contact marketing li	st			06/26/2012 02:38pm	
	☆ ⊘	Other List			Default		Constant C	Contact marketing li	st			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.

🔶 Accounts Con	tacts Opportunities Leads	Calendar Reports	Target Lists	More 👻 Se	arch	Q 2	Administrator - 🕂
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:			
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Contacts 😞							
Create 👻						1(((0 - 0 of 0) > >
Select Select from Reports	Account Nat	ne	Email			Office Phone $\ \Leftrightarrow$	





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".

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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)

Jsers			
Create edit activate and dear	tivate users in Sugar. Create and manage teams and roles i	ncluding module- and field-level	arress
08			Manage rela membarabia and repedies
User Management	Wanage user accounts and passwords	Role Management	Manage fole membership and properties
Team Management	Manage team membership and properties	Password Management	Manage password requirements and expiration
lugar connect			
Jugar Connect			
ersion, file and research repo	rted bugs and request new features and more.		
License Management	Manage license properties	Sugar Support Portal	Access technical support and more
🕅 Sugar Updates	Check for the latest Sugar version	Online Documentation	View Sugar documentation for administrators and end
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 Sugar Updates System Configure the system-wide set System Settings Locale Currencies Languages Search 	Check for the latest Sugar version tings according to the specifications of your organization. Use Configure system-wide settings Set default localization settings for your system Set up currencies and conversion rates Manage which languages are available for users Select modules for the Global Search and configure full-text searching.	 Online Documentation Online Documentation Imoort Wizard Diparade Wizard Backups Repair Diagnostic Tool 	View Sugar documentation for administrators and end users ault locale settings within their user settings page. Use the import wizard to easily import records into th system Upload and install Sugar upgrades Backup Sugar files Check and repair Sugar Capture system configuration for diagnostics and analysis
 Sugar Updates System Configure the system-wide set System Settings Locale Locale Currencies Languages Search Connectors 	Check for the latest Sugar version Ings according to the specifications of your organization. Use Configure system-wide settings Set default localization settings for your system Set up currencies and conversion rates Manage which languages are available for users Select modules for the Global Search and configure full-text searching. Manage connector settings	 Online Documentation Online Documentation Import Wizard Upgrade Wizard Backups Repair Diagnostic Tool Tracker 	View Sugar documentation for administrators and end users ault locale settings within their user settings page. Use the import wizard to easily import records into th system Upload and install Sugar upgrades Backup Sugar files Check and repair Sugar Capture system configuration for diagnostics and analysis Enable/Disable tracking
 Sugar Updates System Configure the system-wide set System Settings Locale Locale Currencies Languages Search Connectors Themes 	Check for the latest Sugar version tings according to the specifications of your organization. Use Configure system-wide settings Set default localization settings for your system Set up currencies and conversion rates Manage which languages are available for users Set modules for the Global Search and configure full-text searching. Manage connector settings Choose themes for users to be able to select	 Online Documentation Online Documentation Control Vizard Import Wizard Darade Wizard Backups Repair Diagnostic Tool Tracker Scheduler 	View Sugar documentation for administrators and end users ault locale settings within their user settings page. Use the import wizard to easily import records into th system Upload and install Sugar upgrades Backup Sugar files Check and repair Sugar Capture system configuration for diagnostics and analysis Enable/Disable tracking Set up scheduled events
 Sugar Updates System Configure the system-wide set System Settings Locale Locale Qurrencies Currencies Languages Search Connectors Themes Activity Streams 	Check for the latest Sugar version Configure system-wide settings Configure system-wide settings Set default localization settings for your system Set up currencies and conversion rates Manage which languages are available for users Select modules for the Global Search and configure full- text searching. Manage connector settings Choose themes for users to be able to select Enable the user feed and module feeds for the My Activity Stream dashlet.	 Online Documentation Contine Documentation Contine Documentation Continue Documentation Import Wizard Import Wizard Deckups Repair Diagnostic Tool Tracker Scheduler PDE 	View Sugar documentation for administrators and end users ault locale settings within their user settings page. Use the import wizard to easily import records into th system Upload and install Sugar upgrades Backup Sugar files Check and repair Sugar Capture system configuration for diagnostics and analysis Enable/Disable tracking Set up scheduled events Manage settings for generated PDF files

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

🕆 Accounts Contacts Opportunities Leads Calendar S	Schedulers More 🗸	Search Q	Administrator - + -
Schedulers			
Job Name Search Clear			3
Delete V			K (1 - 16 of 16)
Scheduler 🔤	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.

Accounts Co	ontacts Opportuni	ties Leads Cale	endar Schedulers	More -	Search	Q <mark>2</mark>	Administrator -
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	20 21						
	22 23						
	24 25						
	26 27						
	28 29						
	30 -						





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.

Account Contacts	Leads iss	ues Campaigns	More 🕶		Search	٩	•
ugarCRM Constant (Contact Integ	ration Updates 🕯	2				
="Array" Edit 💌					(6 of 51+) () Laun	ch Wizard View Stat	us View ROI
Overview						T	
Name:	SugarCRM Cons	stant Contact Integration	n Updates	Status:	Complete		
Start Date:	05/31/2012			Туре:	Email		
End Date:	05/31/2012			Impressions:	775		
Bounces:	77 🗲						
Objective:							
Expected Revenue: (USD \$):							
Description:	Constant Contac	t Campaign Status: S	ent				
Other							
Assigned to:				Teams:	FBSG		
farget List 🔗							
Create 💌						IC (1 - 1	of 1) 🔊 河
Target List 🌲			Description		Type ⊜	Targets in List	
Constant Contact			Constant Contact r	narketing list	Default	274	edit 🔻
racker URLs 🛸							
Create						(10) (1-3	of 3) (>) (>)
Name 🜲	URL 😄					Key 🖨	
http://d2owqhhe2x3j50.cloud	fro http://d2ov utm_sourc	wqhhe2x3j50.cloudfron ce=SugarCRM+Consta	t.net/media.sugarcrm.com/* int+Contact+Integration+Up	2webcast/fbg/FBG-Constant_Cont dates&utm_campaign=Authorize.ne	act_Integration_V2.mp4? at+Integration+Webinar&utm_mediur	n=email 827	edit 🔻
http://d2owqhhe2x3j50.cloud	lfro http://d2ov utm_source	wqhhe2x3j50.cloudfron ce=SugarCRM+Consta	t.net/media.sugarcrm.com/* int+Contact+Integration+Up	2webcast/fbg/FBG-Constant_Cont dates&utm_campaign=Constant+C	act_Integration_V2.mp4? ontact+Update+&utm_medium=ema	il 828	edit 👻
				Loger Contractor			

- 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, optedout, and click through (see below).





Reviewing Campaign Results by Campaign

Account Contacts	Leads asues Campaigns	More *				Starth	۹ .
SugarCRM Constant	Contact Integration Updates						
Delete Test Entries							Launch Wizard View Details View
	Name Sugar	RM Constant Contact Integration Updates			Assigned to		
	Status Compl	et#			Team	FBSG	
	Blart Date 05/31/	2012			Data Modified	06/25/2012 07:00am by Jake	
	End Date: 05/31/	2012			Date Created	06/01/2012 06 32pm by wesc	
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Aarc Castillo	marc castillo@totssport	s.com		Message Sent/Attempted	05/31/2012 07:00am		0
ark LaBarge	mark@labarpeco.com			Message Sent/Attempted	05/31/2012 07:00am		0
David Lewis	david@davidmlewis.com			Message Sent/Attempted	05/31/2012 07:00am		0
obert: George	robert_george@ao.usco	uns gov		Message Sent/Attempted	05/31/2012 07:90am		
en Payne	bpayne@jetheaddes.com	n		Message Sent/Attempted	05/31/2012 07 00am		0
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## Reviewing Campaign Results by Contact or Lead in SugarCRM



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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 Infor	nation							
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		Fax						
Sync to Outlook®		Mobile:						
Primary Address	6320 Canoga Avenue 15th Floor Woodland Hills CA 91367	Notes:						
Contact Type	Other							
Sync to Constant Contact		Constant Contact Lists:	FBSG     Constant Contact     Authorize.net     SugarCRM Client List     SugarCRM Lead List					
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### **Technical Notes**





#### **Technical Notes**

System requirements:

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