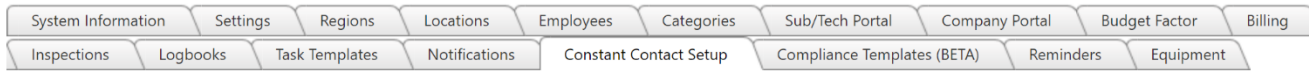


Constant Contact Integration

Initial Setup:

After the integration has been activated by Support, go to Settings → System Setup → Constant Contact Setup. The API Key and Client Secret will be populated already.



Constant Contact Information

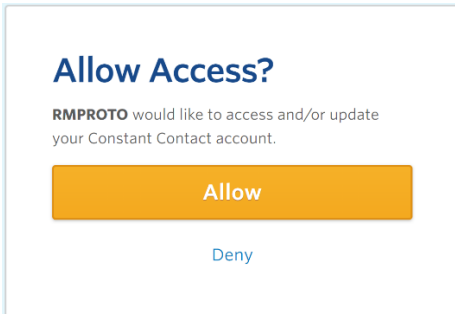
API Key:

Client Secret:

User Name Linked:

No authentication is present.

1. Click the Activate Link () button. This will take you to the Constant Contact login page.
2. Enter your Constant Contact Username and Password.
3. On the Allow Access screen in Constant Contact, click 'Allow'.



- 4.
5. This will connect your Constant Contact account to Restoration Manager. You will be directed back to the Setup Page in Restoration Manager and confirm the account has been fully activated.

Mass Syncing Company Contacts to Constant Contact

After the integration is set up, you can mass sync your Company Contacts from Restoration Manager to Constant Contact. Go to Settings → System Setup → Constant Contact Setup.



Constant Contact Integration

Add Project Contacts to Constant Contact

Constant Contact List:

- Plumbers (0 contacts)
- General Interest (1 contacts)
- Agents (0 contacts)
- Adjusters (0 contacts)
- Past Customers (0 contacts)

Title: <All> Company: Marketing Cat: <All>

Company: <All> Type:

Q

Jim Smith - - Insurance ABC

»
«
»»
««

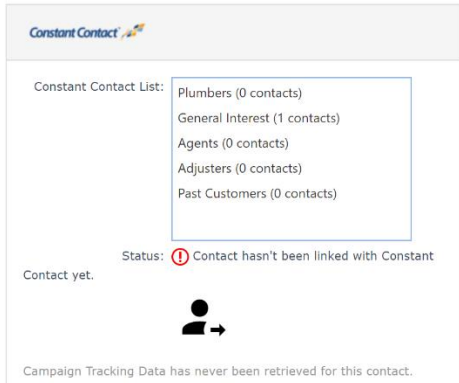
👤 📧

1. Select the List you wish to send your contacts to. (Note: If you would like to send to multiple lists, hold CTRL and select the additional list(s)).
2. Filter by one or multiple criteria to find the contacts you wish to sync.
 - a. Title – Contacts Title/Position
 - b. Company – The company the contact(s) belong to
 - c. Marketing Cat – Marketing Category List the contact is on
 - d. Company Type – Type of company the contact(s) belong to.
3. Once your filter is set, select the Search Icon (Q)
4. This will return a list of all contacts that meet your search criteria AND that has an email address in Restoration Manager.
5. Select the contact(s) you would like to add to the list and use the arrow to move them to the right box.
6. Once you have all your contacts selected, click the Send to CC (👤📧) button.
7. This will add your contacts into Constant Contact.

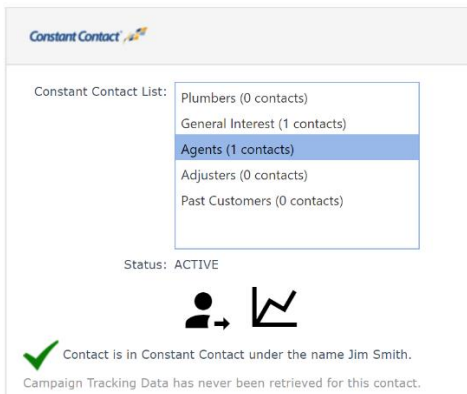
Adding a single Company Contact to Constant Contact

1. Navigate to a Company Contact in Restoration Manager
2. Scroll to the Constant Contact Box on the right side of the page.

Constant Contact Integration



3. Select the List or Lists you would like the contact to be added to.
4. Press the Send to CC button.
5. The contact will be added to Constant Contact and the Status will update to Active.



6. The following Information is added in Constant Contact
 - a. Email Address
 - b. First Name
 - c. Last Name
 - d. Title
 - e. Company
7. If a matching email address already exists in Constant Contact, it will display a message saying “A contact with the email provided already exists in Constant Contact under the name of XXXX. Please press update in order to link this contact with RM (will override current data in Constant Contact)”.
 - a. When you press the Send to CC button again, it will update the contact in Constant Contact for you.
 - b. This can also be used to add a contact to an additional list.

Adding a Job Contact to a list in Constant Contact

1. Navigate to a Job
2. Click on Job Contacts
3. Double click on the contact you wish to add to Constant Contact
4. Scroll down to the Constant Contact box
5. Follow Steps 3-7 in previous section.

Mass Pulling Campaign Data

1. To pull all results from a recent campaign, go to Setup → System Setup → Constant Contact Setup

Constant Contact Integration

2. Scroll to the bottom of the page and select the campaign you wish to pull the data from.




Select a Campaign:

Update Email on our Services

- a.
3. Click the Get Campaign Data button. This will pull all results from the campaign and create a correspondence note on the contact for each of the following.
 - a. CC – Click → Contact clicked on a link in the email
 - b. CC – Open → Contact opened the email
 - c. CC – Send → Contact was sent the email
 - d. CC – Unsubscribed → Contact unsubscribed from future emails

Pulling Campaign Data on a Single Contact

1. Navigate to the Company or Job Contact
2. Scroll to the Constant Contact box
3. Click the Get Tracking Data button ()
4. This will pull all the Campaign data for the contact and add it as correspondence.