

Contactegration for The Raiser's Edge

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Overview

Contactegration for The Raiser's Edge integrates Constant Contact with The Raiser's Edge to allow for better bulk email management.

Contactegration allows you to export and update records directly from RE into Constant Contact for use in mass email marketing and gives you the ability to manage your campaign results, including bounces and unsubscribes.

Installation¹

When you download Contactegration from Zeidman Development and unzip the compressed file, there is only one application to be installed:

- Contactegration client – Installed wherever The Raiser's Edge is installed and the user sends bulk emails.

In general the installation is straight forward. Run the Contactegration Setup.exe file and follow the wizard.

(In previous versions there was a server setup. This is no longer required and has been removed from the installation package)

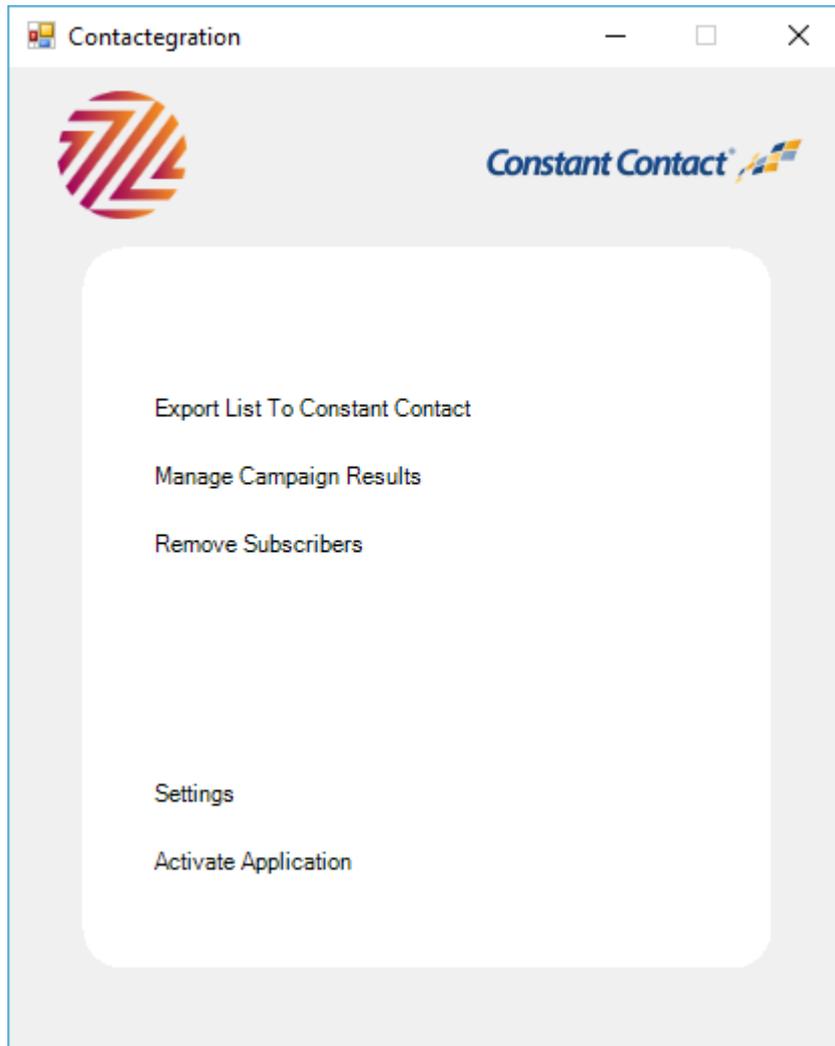
Set up

The first time you use Contactegration you will need to configure it with Constant Contact before you can start using it.

Firstly go to plug-ins and open Contactegration. You will see the screen below:

¹ Please note that regrettably Contactegration does not work in the Blackbaud hosted environment at the present time

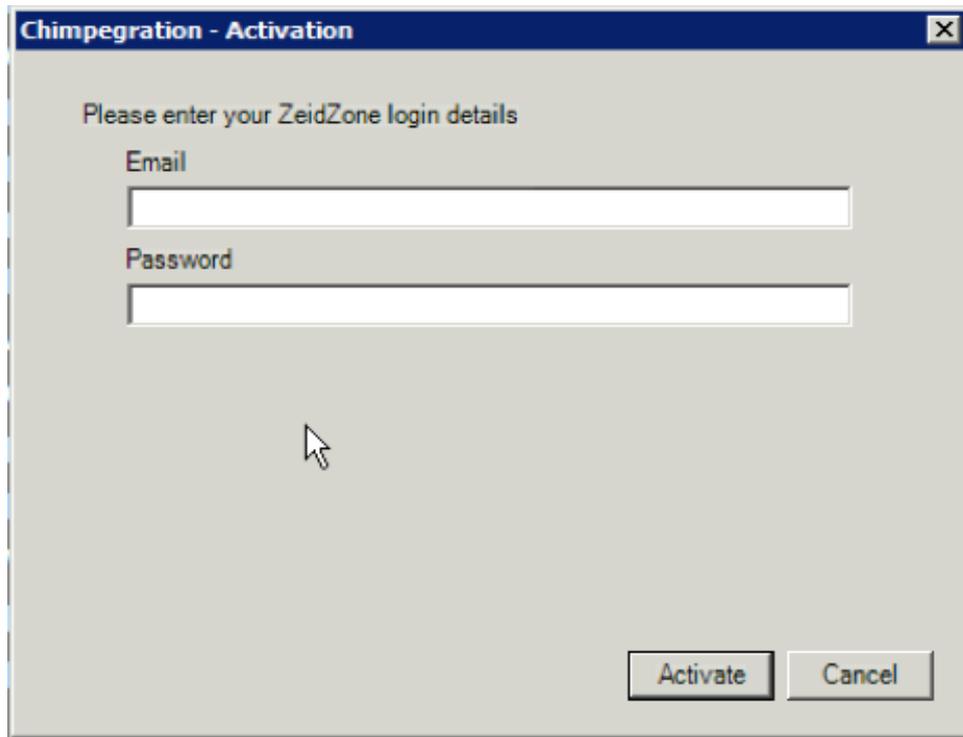




Activation

You need to first click on Activate Application. This will prompt you to enter your ZeidZone username and password.





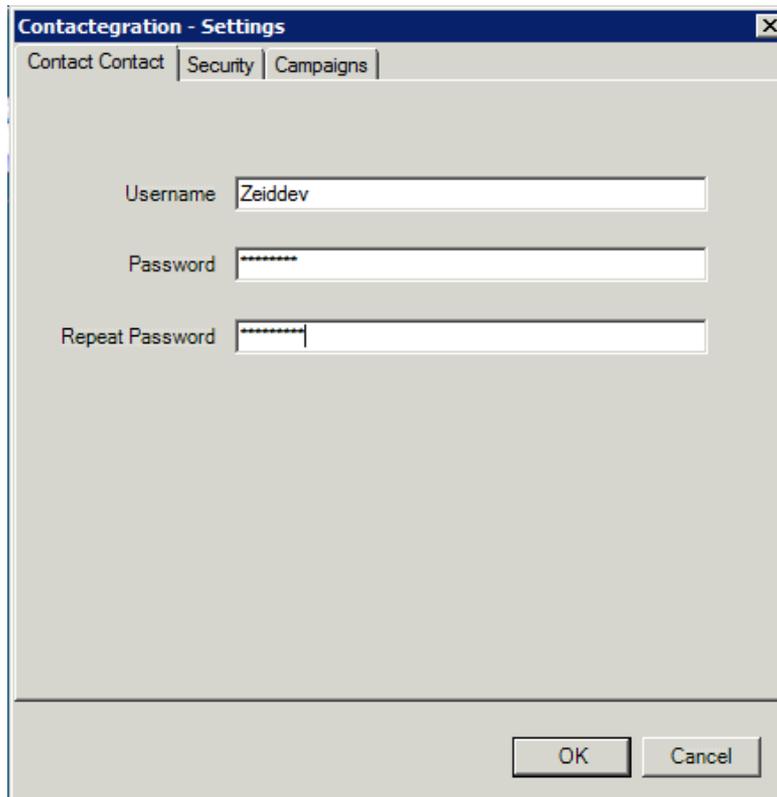
Activation will register your copy of Contactegration with Zeidman Development. The process sends your organisation name and Raiser's Edge serial number to our secure servers. This generates a registration code that is unique to your installation.

Connecting to Constant Contact

In order for Contactegration to "talk" to Constant Contact you will need to enter your Constant Contact login details.

Click on Settings and enter your Constant Contact User Name and Password.





You are now ready to start using Contactegration.

Day to Day Usage

Export

To export data from RE into Constant Contact you must first create a list in Constant Contact.

Then in RE you can create a query of users who you wish to export, be sure to include any fields you wish to use in the mailing in the output criteria. These fields will map to your Constant Contact list's merge variables. You will need to ensure there are no blank email address fields in your query, the best way to do this is to use the preferred email address field in the output.

Go into the plug-in and select Export list to Constant Contact. Select your Constant Contact list and

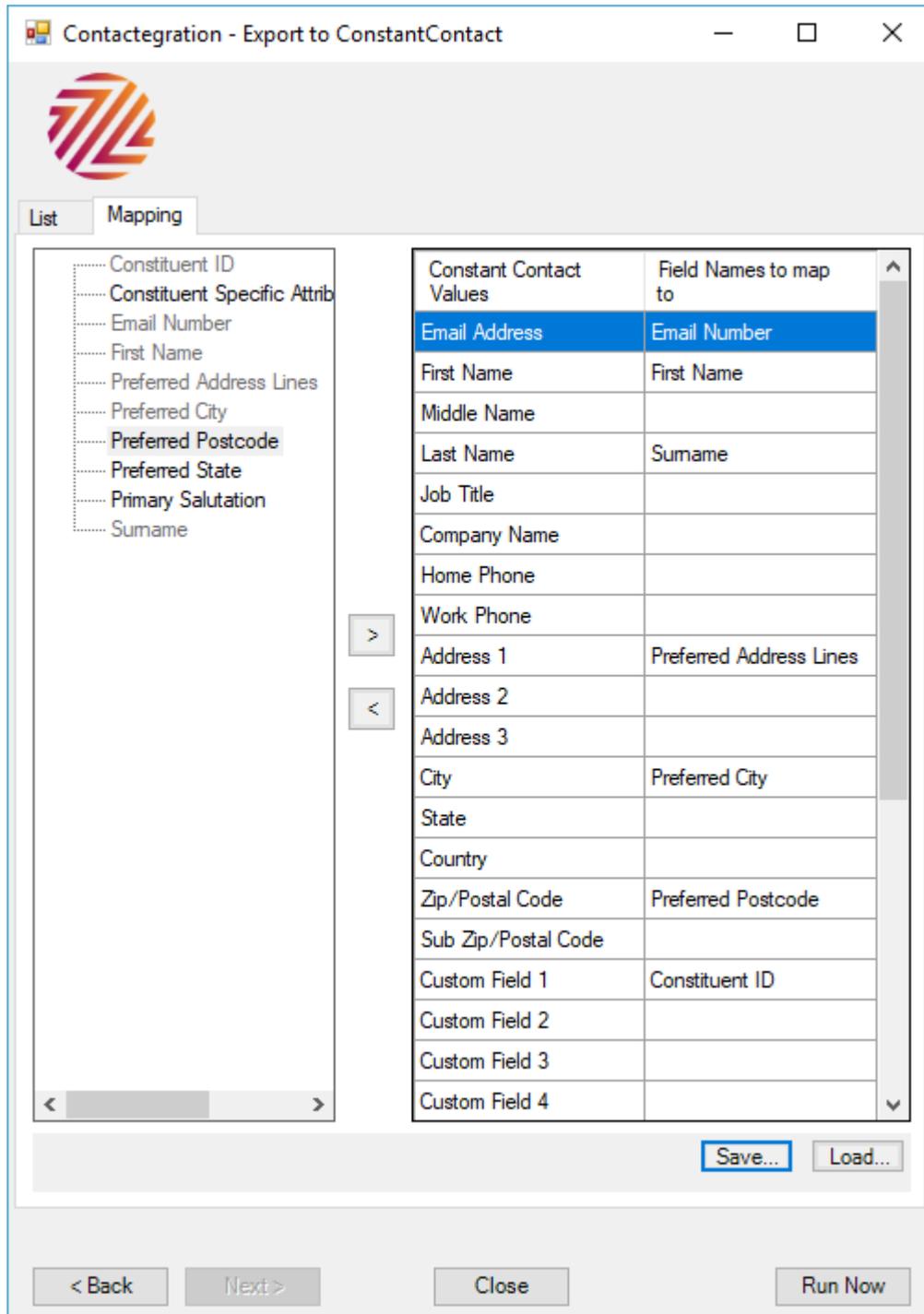
Select the query of users to export and create a control report, this will show you errors, if any, from the export.



Next you need to map the fields from your query to the fields in Constant Contact. You can map name and address fields and choose up to 15 custom merge fields in Constant Contact. You must include an email address or the export will not run. It is also recommended that you map the Constituent ID so you can use it when managing campaign results, make a note of the merge field number to which you map ConsID.

Please note that the export will update any existing fields in Constant Contact with new values if they have changed in RE, using the email address to match between the two.





You can save mapping files you use regularly and load them here to save you time.

Once all your fields are mapped click on Run Now. You will now be able to see your constituents in your Constant Contact list and email them using a regular Constant Contact campaign.



Manage Campaign Results

Once you have run your email campaign as normal from Constant Contact you can update records in RE based on the outcome of the mailing.

Select the email campaign you wish to manage from the dropdown list.

Select the type of emails to process. Select one of the following; Bounces, Unsubscribes, Everyone Sent or Everyone Opened. 'Everyone Sent' will give you a list of all those people who actually received your email, so everyone on that list excluding the hard and soft bounces.

Contactegration - Campaign Management

General | **Email Matching** | Process

What to get from ConstantContact...

Select Campaign

Campaign Created 2015/02/23, 11:35 AM

Get bounces

Get unsubscribes

Get everyone sent

Get everyone who opened

Control Report:

Create a query of updated constituents

< Back Next > Close Run Now



Create a control report for any errors in the process, you can also choose to create a query of updated records.

Choose how to identify your constituents in RE, you can either match on email address or Cons ID, if matching on ID make sure you match to the same field you exported the ConID to.

Contactegration - Campaign Management

General Email Matching Process

How emails and constituents be matched?

Match email against all constituents found

Match on Constituent Id mapped to the following merge field

Custom Field 1
Custom Field 2
Custom Field 3
Custom Field 4
Custom Field 5
Custom Field 6
Custom Field 7
Custom Field 8
Custom Field 9
Custom Field 10
Custom Field 11
Custom Field 12
Custom Field 13
Custom Field 14
Custom Field 15

< Back Next > Close Run Now

You can now choose how the records should be processed, you can choose one or more of the following:

- Change the email type



- Mark the email as do not contact
- Delete the email address
- Add a solicit code
- Globally add an action, attribute or appeal to the constituent record.

Some of these actions will be more relevant to the processing of emails. For example for bounced emails you may want to delete the email address or change the email type to “Inactive email”. Whereas if you select to process all emails that were sent, you may wish to add an action or an appeal to those constituents.

Contactegration - Campaign Management

General Email Matching Process

How should these email addresses be processed?

Change the type to

Mark as inactive

Mark as do not contact

Delete the email

Add solicit code

Add Action **Action** Action Added

Add constituent attribute Attribute

Add Appeal Appeal

< Back Next > Close Run Now



Once you have run the process you can repeat it as many times as you need to, performing different actions for different processes.

Remove subscribers

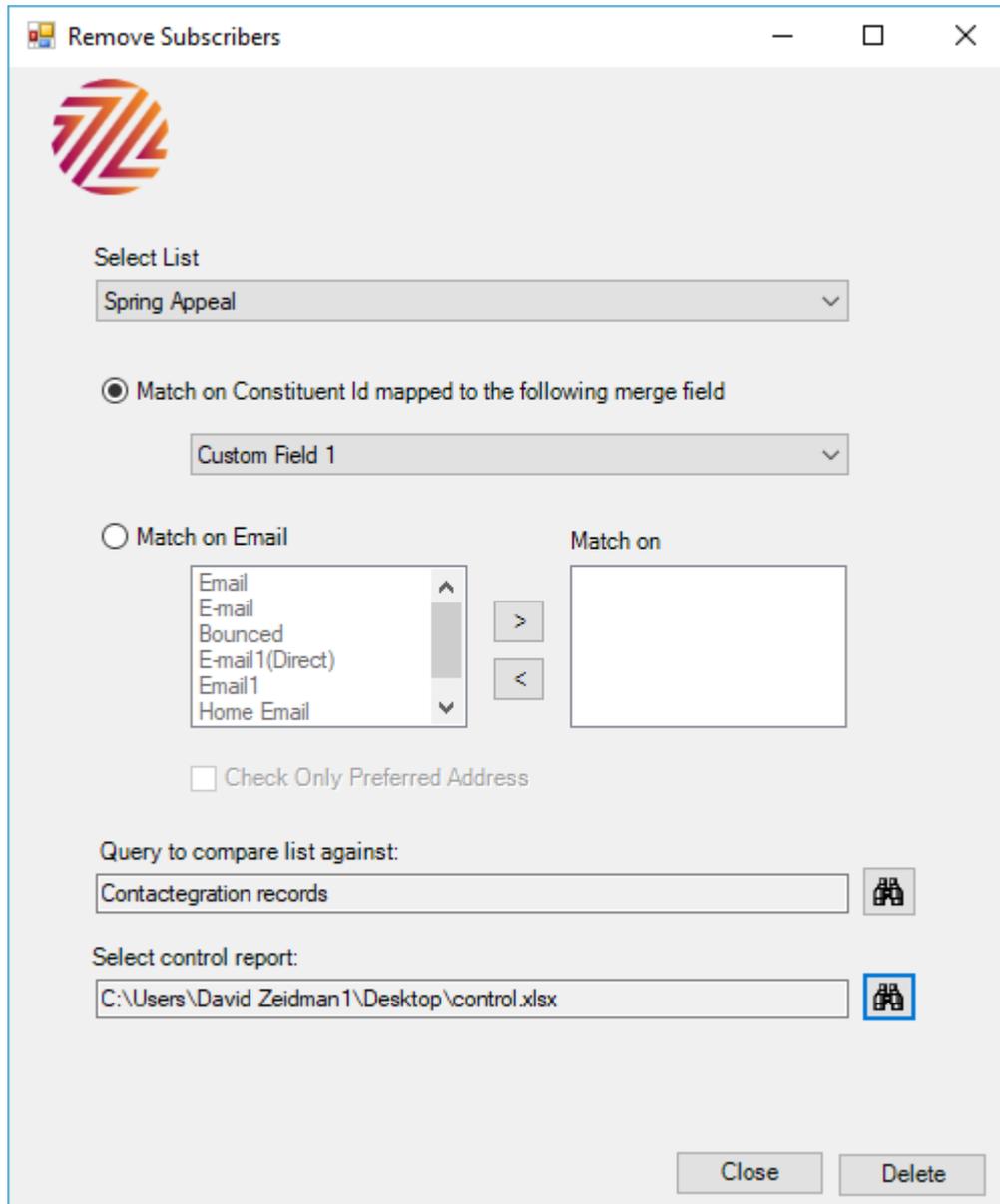
Select 'Remove Subscribers' from the main menu, select the Constant Contact list from which you wish to remove subscribers, map the ConsID to the appropriate custom field.

IMPORTANT NOTE: if you map this incorrectly Contactegration will attempt to delete all records. Please check this carefully before proceeding.

If you choose to match on email please select the email type from the list on the left and move to the right, you can select more than one. You can also choose to check only the preferred address for email addresses.

Choose the query to use and create a control report, as with all control reports this will show any errors in the remove process.





Click delete to start processing. Your constituents have now been removed.

Settings

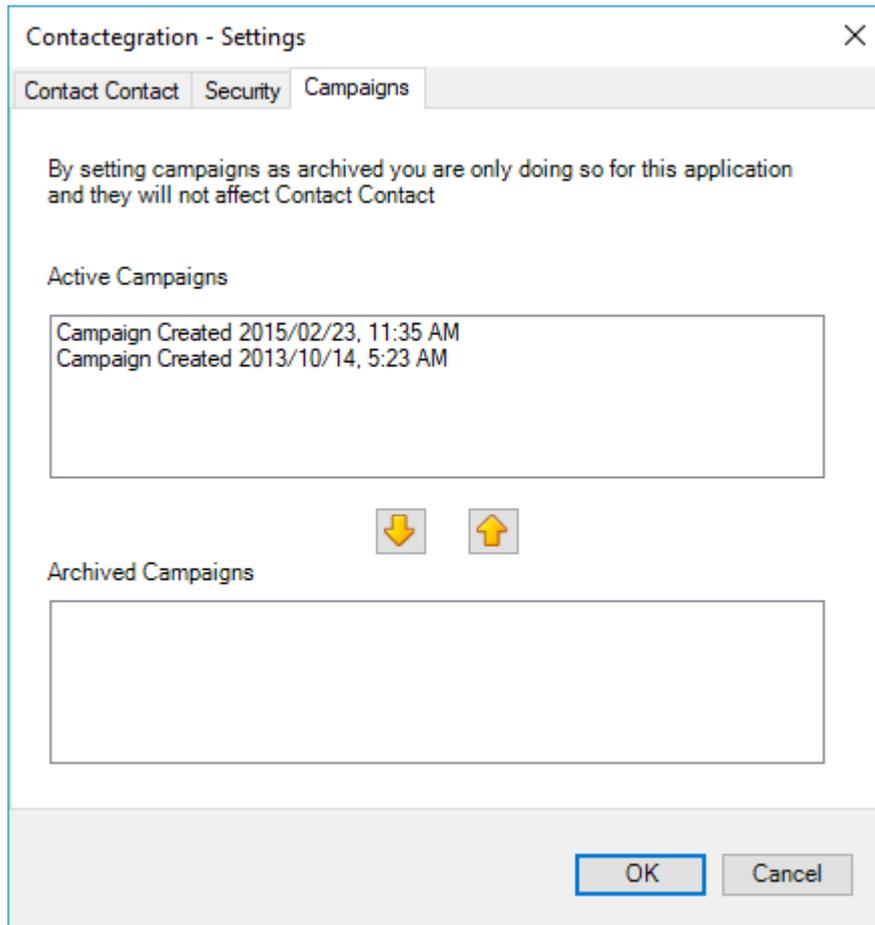
Security settings allow you to lock down certain areas of processing for Supervisor users only. Simply click on the radio buttons and click 'save' to set up.



	Available to Supervisor users	Available to all users
Export List to Contact Contact	<input checked="" type="radio"/>	<input type="radio"/>
Manage Campaign Result	<input checked="" type="radio"/>	<input type="radio"/>
Remove Subscribers	<input checked="" type="radio"/>	<input type="radio"/>
Settings	<input checked="" type="radio"/>	<input type="radio"/>
Activate Application	<input checked="" type="radio"/>	<input type="radio"/>

Campaigns allows you to manage the dropdown menu users see in the 'Manage Campaign Results' area. You can archive old campaigns to keep the list clean or move archived campaigns back into the live list for further processing using the arrow keys. Note that the archiving process only affects Contactegration and does not affect the campaigns set up on Constant Contact.





Resources

For general information about working with Constant Contact, see their website <https://www.constantcontact.com>

