

Constant Contact

Note: the preferred browsers for Constant Contact are Chrome and Firefox

Overview

The interface in VinNOW provides the following features:

- Creates a Constant Contact account.
- Logs in to Constant Contact automatically from VinNOW. Note: depending on your system browsers and Constant Contact account, you may have to log in via their website.
- Uploads email mailing lists.
- Downloads and automatically handles bounced or unsubscribed email addresses.
- Provides you the option to automatically put a note in the VinNOW customer file of every customer that was part of the upload.

Constant Contact is accessed in VinNOW from the Customer Search screen Utilities menu, Constant Contact Email/ Marketing.

Setting Up Your Constant Contact Account

Before you can use Constant Contact, you must create an account, VinNOW gives you the tools to accomplish this from within VinNOW. The first time you access the Constant Contact function you will see a screen that you can enter your winery and contact information in.

The data in the fields from Winery Name and below come from your Winery Info record on the System Options menu and they should not be changed here. If you have not supplied this information in your Winery Info record, or the information is not correct, you will need to click the Cancel button, and update this information in your Winery Info record before proceeding.

Authentication VinNOW Connection to Constant Contact

Exit

VinNOW

Constant Contact®

Status: Not Authenticated (Constant Contact account is not linked to VinNOW)

Username:

Password:

Company Name:

First Name:

Last Name:

Email Address:

Phone:

State:

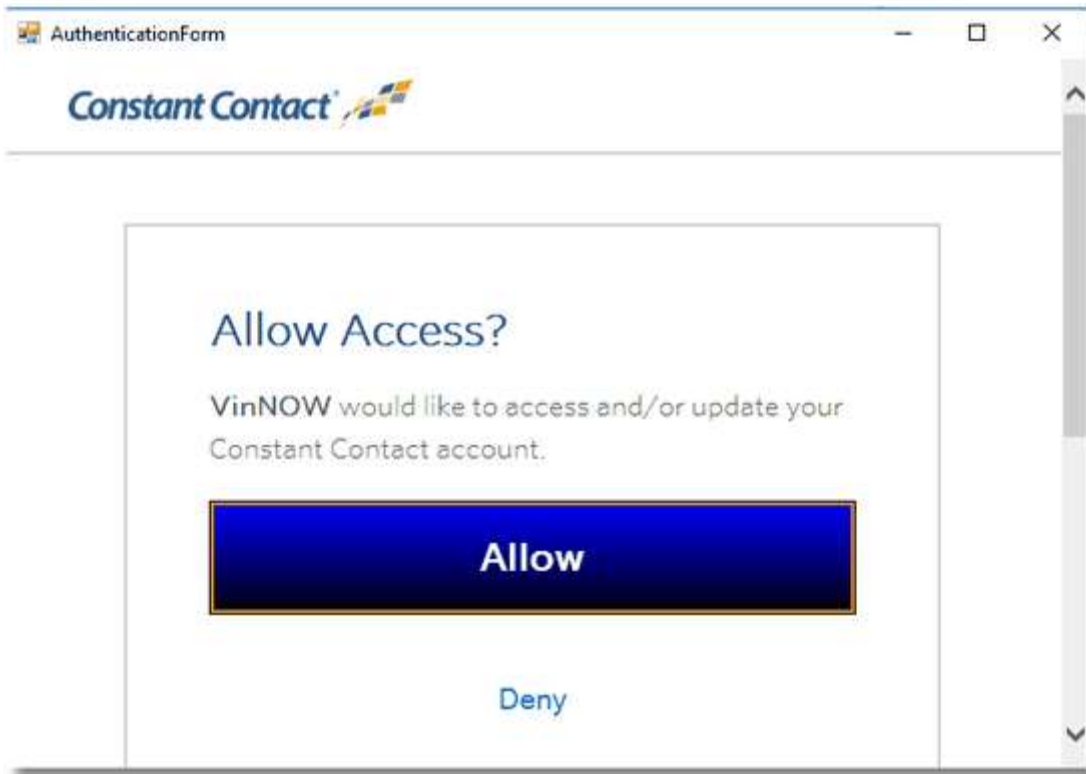
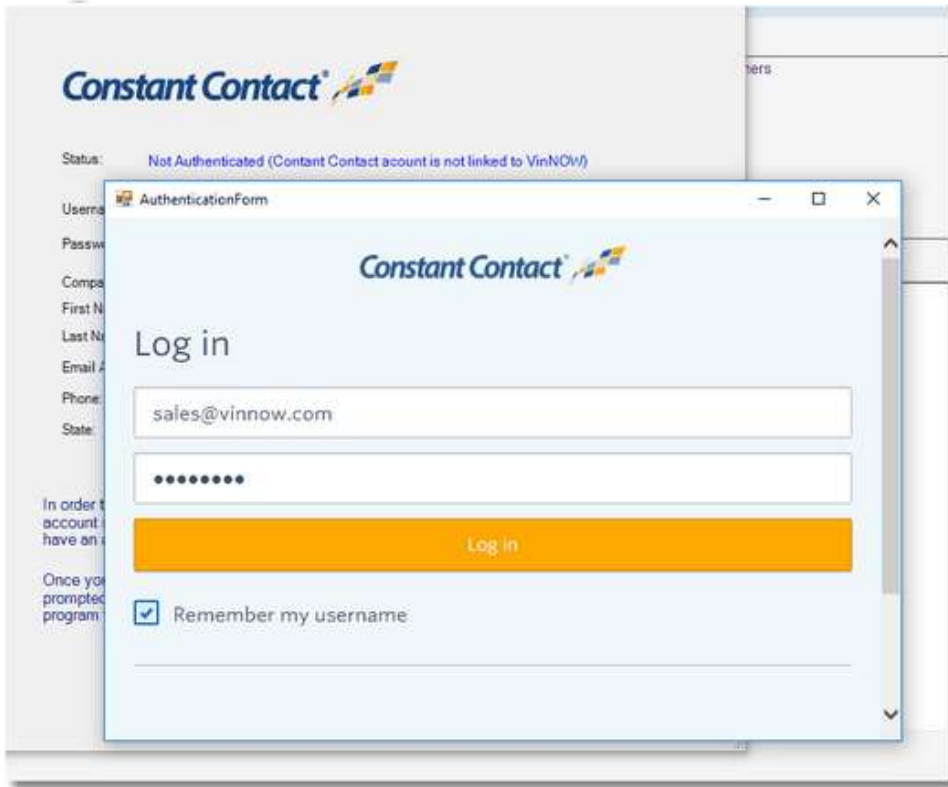
OK

In order to use the VinNOW to Constant Contact integration, your Constant Contact account must be linked to VinNOW, by filling in the information above. If you do not have an account, filling in the information above will create one.

Once you have supplied the information above, OK button. You will then be prompted to login to Constant Contact to Grant access permitting the VinNOW program to access your account completing the linkage.

To set up a Constant Contact account if you don't already have one, you need to provide what is going to be your account user name, password and company information. The Password will be used if you log in to your Constant Contact account by accessing the Internet directly without using VinNOW.

Once your account has been created, you be prompted to login to Constant Contact to grant access permitting VinNOW to access your account which will complete the set up. You will not be able to update or change your Constant Contact account from VinNOW. Changes to the account information must be made within Constant Contact and then changed in VinNOW to match Constant Contact via the Authentication button at the top of the Login screen.

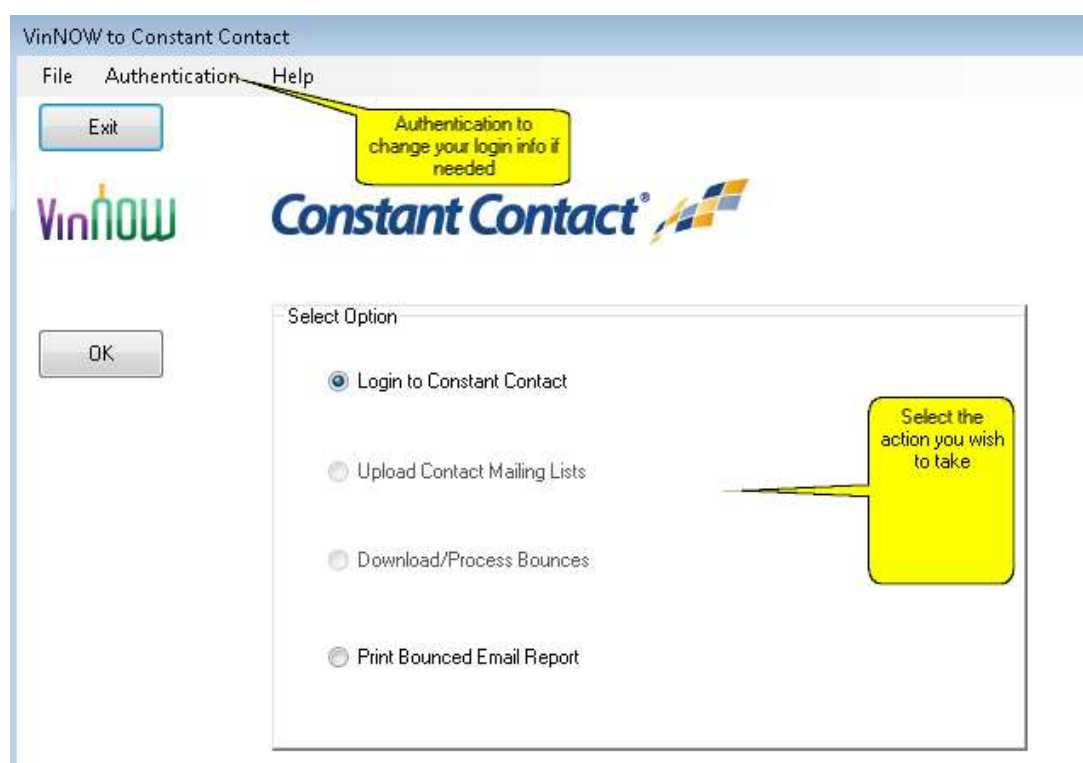


When you have supplied the necessary information, click the "ok" button to create your account. If the account is successfully created you will be prompted to log into Constant Contact, and validate you allow VinNOW to access your Constant Contact account.

Uploading Mailing List Data

To upload mailing listing information from VinNOW to Constant Contact you must first perform a search in VinNOW for the list you want to upload. For example, if you want to upload all the customers in a specific wine club, on the VinNOW Customer Search screen, select the wine club and click Search so the members are displayed.

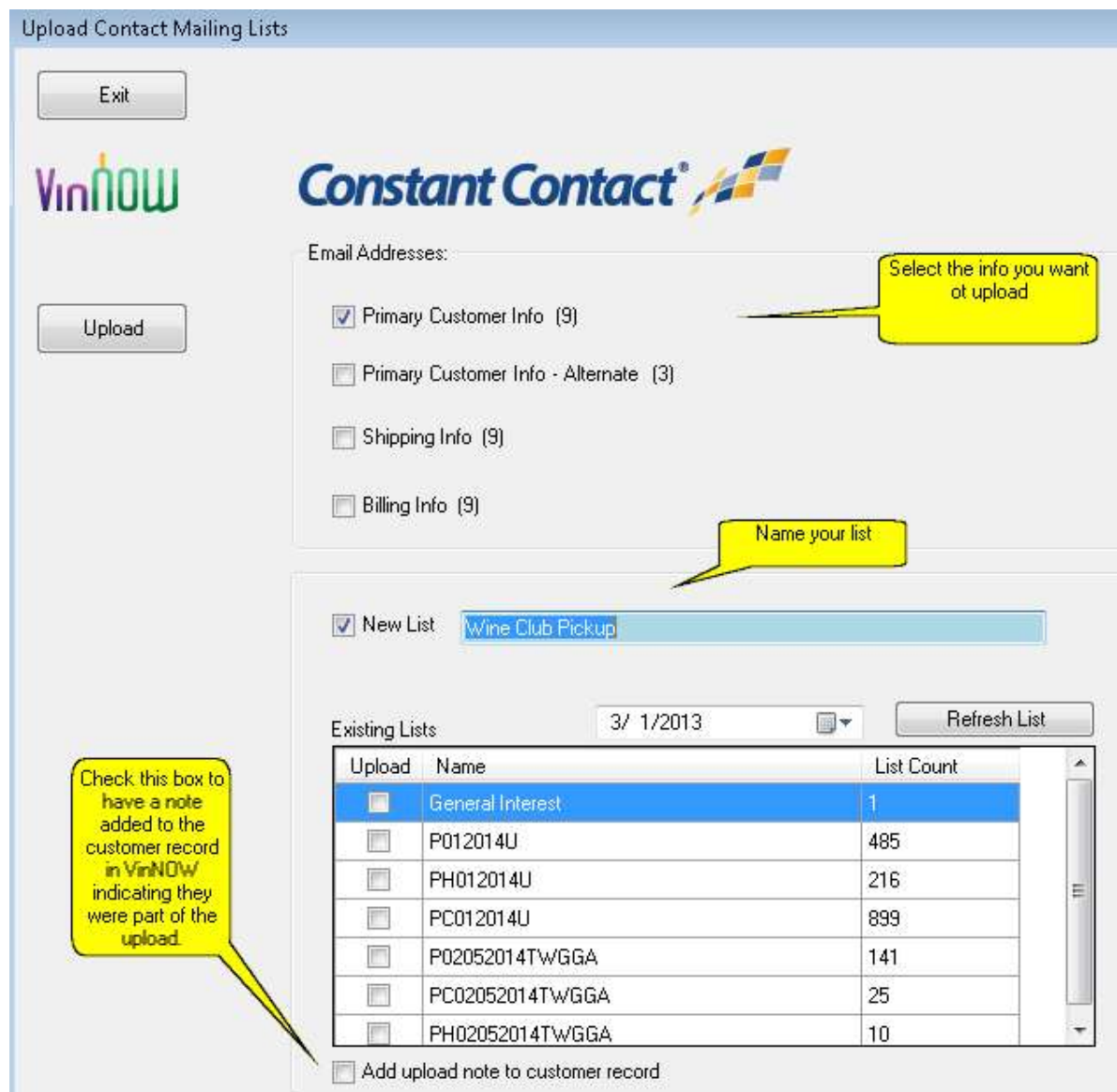
Next, select Constant Contact on the Utilities menu. Click the Upload Mailing List option and then click OK.



VinNOW will display a message if not all of the customers you have selected have an email address. You will then have the option to continue or to "X" out of that screen and work on your customer data before uploading again.

When you upload a list, you have the option of uploading mailing list information from the customer information, the billing information, or the shipping information. The default is always the customer information. You also have the option to check the box if you wish to have VinNOW add a note to each customer in the list indicating that you have uploaded to Constant Contact. If you do not want this note to automatically be placed in their customer record note section, make sure you uncheck the box.

Each mailing list uploaded must have a name. This helps you identify and manage your mailing lists once they have been uploaded to Constant Contact. VinNOW supplies a default unique name for the list, but you may supply your own mailing list name by typing the desired name in the field.



Upload Contact Mailing Lists

Exit

VinNOW

Constant Contact®

Email Addresses:

☒ Primary Customer Info (9)

☐ Primary Customer Info - Alternate (3)

☐ Shipping Info (9)

☐ Billing Info (9)

Select the info you want to upload

Upload

☒ New List

Wine Club Pickup

Name your list

Existing Lists

3/ 1/2013

Refresh List

Upload	Name	List Count
☐	General Interest	1
☐	P012014U	485
☐	PH012014U	216
☐	PC012014U	899
☐	P02052014TWGGA	141
☐	PC02052014TWGGA	25
☐	PH02052014TWGGA	10

☐ Add upload note to customer record

Check this box to have a note added to the customer record in VinNOW indicating they were part of the upload.

The next screen will display Constant Contact's spam agreement which you will need to agree to in order to continue.

Once you have agreed to continue the list will upload and you will receive a notification of how many records uploaded, how many were rejected by Constant Contact and a message asking if you want to log on to Constant Contact to work on your campaign.

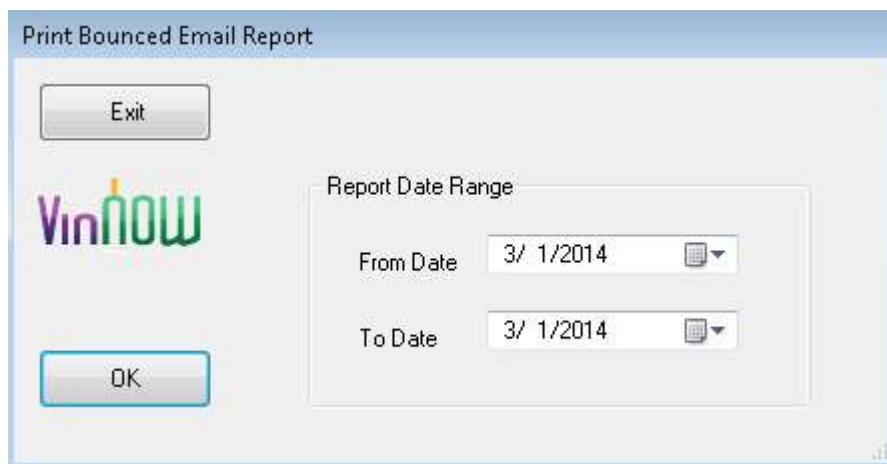
If the total number of records uploaded does not match the number of records in your original list, this can be for any of the following reasons:

- There was not an email address in the customer record to be uploaded. Only records containing valid email addresses will be uploaded.
- There are email addresses in all of the records to be uploaded, but there are duplicate email addresses in the list. Only one record will be uploaded from a set of duplicate email addresses. Email addresses must be unique for each record uploaded.

NOTE: If the email address being uploaded to Constant Contact has been previously bounced or unsubscribed on the Constant Contact system you must first take it off the do not send list prior to attempting to upload the email again. Contact Constant Contact if the email address should not be on their do not send list and they will be able to assist you with this issue.

Downloading/Processing Email Bounces And Unsubscribes

You have two options for handling bounces and unsubscribes. You can choose to just print a report and no further actions will be taken in VinNOW:



You also have the ability to have VinNOW download and process all emails that had bounces and unsubscribes. On the main Constant Contact screen, select the Download/Process Bounces and Unsubscribes option, and click OK.

The Constant Contact system will then send a list of any bounced or unsubscribed emails to VinNOW. The program will automatically remove any bounced or unsubscribed email addresses from the appropriate VinNOW customer records and place a note in the customers record similar to the following describing the action taken.



Email address removed (rmjjjkt@yahoo.com) - Constant Contact (BOUNCE)

Note: it is possible for a valid email to have been bounced on a specific email campaign, emails may bounce for a variety of reasons. We recommend following up to see if a removed email is valid and correct. If so, you will need to take the email address from the notes section or report and repopulate the email field in the customer record.

Please note: Constant Contact® uses the email address as their way to manage the data provided to them. The number of records uploaded may vary. If your customer record does not contain an email address Constant Contact rejects the record. Additionally, Constant Contact will not upload duplicate email addresses.

Your system clock must be synchronized with the correct Internet time to be able to log into Constant Contact. VinNOW does not use a user name password combination to log you into Constant Contact. VinNOW has a built-in secure link to Constant Contact for your account.

Note: An error of "The specified impersonation is not authorized" means the e-mail address stored in VinNOW does not match what Constant Contact has for that account, or the account is not set up as a VinNOW Sub-account with Constant Contact.

Follow the steps below if you get this impersonation not authorized message:

1. Verify with Constant Contact, via phone, the email account that is setup for use with VinNOW. In addition, verify with Constant Contact that their account is setup as a "VinNOW® Sub Account" (this can only be done by making a call to Constant Contact-there is no way to verify this in VinNOW & there isn't a setting that needs changing in VinNOW).
2. After the above is determined, verify the email account that is setup in VinNOW by going to Utilities, Constant Contact, "Authentication" and view the email address that is currently setup. If the email address needs to be changed, enter the new one on the top line, then click Update, exit the Constant Contact create account screen, all the way, then go back in and try doing an upload again.



Ports:

TCP port 443 is the standard TCP port that is used for websites which use SSL. We don't change it in our code, so URL's beginning with "https", should be using port 443.