

Constant Contact Integration

Get started with Constant Contact: digital marketing platform

Wylie customers receive an exclusive 10-20% discount on Constant Contact. Take advantage of a free trial.

To receive a 10-20% discount [follow this link to learn more](#)

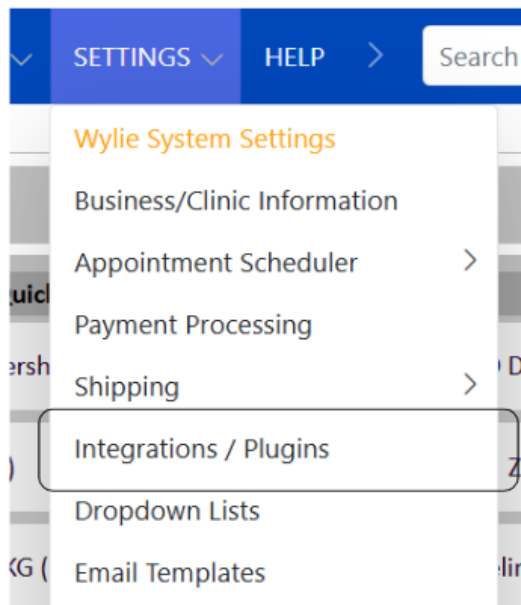
View all features and pricing [HERE](#). *(discount will be applied at checkout)*

Using Constant Contact with Wylie:

This integration makes it easy to keep all clients up to date in Constant Contact while taking advantage of their marketing features. Wylie automatically creates and updates lists in Constant Contact to help target clients based on actions in Wylie. For example, customers without an appointment in the last 30 days.

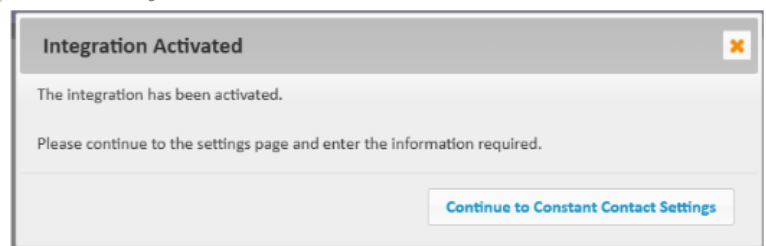
Sync Wylie Contacts:

1. Before connecting Wylie, you must create your Constant Contact account by selecting the 'follow this link to learn more' link above.
2. Once you have created your Constant Contact account, log into Wylie, and select the 'settings' menu on the blue bar.
3. Select 'Integrations/Plugins' in the menu.



4. On this page, you will see Constant Contact in the table. Select

5. You will then get a pop-up, where you will want to select 'Continue to



6. Select the first button on the page to 'Connect Constant Contact Account'. You will then be prompted to log in to your Constant

Constant Contact

Constant Contact Integration Settings

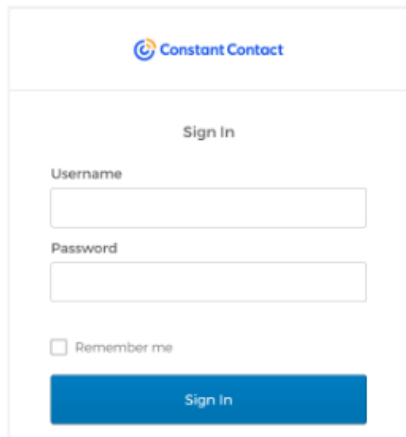
Connect Constant Contact account

Bulk import Wylie contacts into Constant Contact

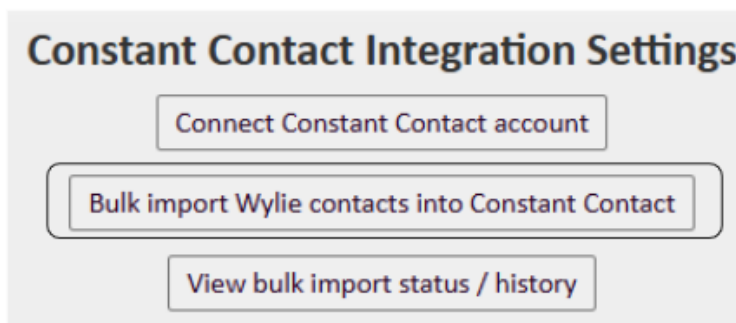
View bulk import status / history

ie table.

Contact account.

The image shows the Constant Contact Sign In page. At the top is the Constant Contact logo. Below it is the text "Sign In". There are two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Remember me". At the bottom is a blue button labeled "Sign In".

7. Then select the second button to 'Bulk import Wylie Customers into Constant Contact'. This may take a few minutes. Please leave the dialog box up for as long as possible while the data is being processed. If you receive an error, your data is likely still syncing in the background and this process may take until the next morning to finish. However, after this initial sync, the data syncing is instant/automatic.

The image shows the "Constant Contact Integration Settings" dialog box. It has a title bar at the top. Below the title bar are three buttons: "Connect Constant Contact account", "Bulk import Wylie contacts into Constant Contact", and "View bulk import status / history".

8. Now, open a separate tab in your browser and log into Constant Contact to check that all your contacts from Wylie have been imported. You will find this under 'contacts' on the blue menu, then 'lists', then 'Wylie: Contacts' list.

Mass-emailing templates to specific Wylie clients:

- Clients can be targeted based on the list or segment they belong to. To learn how to create an email in Constant Contact [CLICK HERE](#) and to schedule and send the email [CLICK HERE](#). To create a Segment that

allows for even more specific targeting than a list [CLICK HERE](#). **TIP:** When creating segments, under 'criteria' choose 'custom field' to choose from the custom fields that Wylie has imported. This will allow you to target clients based on details in Wylie such as start date, program name, program start date, process start date, last appointment date, and last purchase date.

Creating automated emails or SMS (Text) drip campaigns:

- You can set a series of emails to go out to specific clients based on an action taken by you or the client. To learn how to create and trigger this series of emails [CLICK HERE](#).

Sending mass-text campaigns:

- To set up texting on your account [CLICK HERE](#) and to learn how to send out mass-text to your clients [CLICK HERE](#).

Online URL: <https://help.wyliebiz.com/article.php?id=45>