

Constant Contact Integration

Get started with Constant Contact:

To receive a 10-20% discount [follow this link to get started.](#)

View all features and pricing [HERE.](#)

Wylie charges \$15/month to add the integration. (if you sign up between Jan 16th - Feb 28th, 2025 this fee is waived for the first 6 months)

Sync Wylie Contacts:

1. Before connecting Wylie, you must create your constant contact account by selecting the 'follow this link to get started' 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 'Activate' to the far right of the 'Constant Contact' option in the table.
5. You will then get a pop-up, where you will want to select 'Continue to Constant Contact settings'.
6. Select the first button on the page to 'Connect Constant Contact Account'. You will then be prompted to log in to your Constant Contact account.
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.
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.

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. Below are some common marketing functions and where to access the particular help guide.

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 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/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](#).

Creating automated text/drip campaigns:

- To set up specific texts to go out automatically based on the action of you or the client [CLICK HERE](#).

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