

Constant Contact Email Sync Guide

DonorPerfect Online

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Table of Contents

INTRODUCTION	3
Types of Synchronization	3
Data Synchronization when Accessing the Constant Contact Email Module	3
Synchronizing Constant Contact Email Module screens	3
Field Mapping	3
Nightly Database Synchronization	4
Performance Limits	4
SYNCHRONIZING CONSTANT CONTACT EMAIL MODULE SCREENS.....	5
Campaign Results Screen	5
List Management Screen	5
Reports Screen	6
Settings Screens.....	6
Email Information Section in DPO Main Entry Screen.....	6
FIELD MAPPING SYNCHRONIZATION	7
NIGHTLY DATABASE SYNC	9
Manually Running a Nightly Database Sync.....	9
Enabling the Nightly Database Sync	9
What the Nightly Database Sync Does.....	9
Creating and Updating Constituent Records in DPO.....	9
Creating and Updating Contacts in Constant Contact.....	10
Creating and Updating DPO Contact Records for Constant Contact Email Campaigns.....	11
Updating the Contents of Dynamic Lists on the Constant Contact website	11
Field Mapping Data Updated on Constant Contact	11
Nightly Database Sync Performance Issues	12
Sync Setting Examples	12
Default Settings.....	12
Basic Nightly Sync	13
Full-Featured Sync.....	13

Introduction

The Constant Contact Email module provides a new level of integration between Constant Contact and DonorPerfect Online. However, in order for the module to function, data must be moved back and forth between DPO (DonorPerfect Online) and Constant Contact, in order to keep both web applications in sync with each other. This document explains how the synchronization features work, and how you can use them to strike a balance between the amount of synchronization you want, and the system performance that you need.

Types of Synchronization

Constant Contact Email has to synchronize its data with the Constant Contact website in order to keep itself up to date. This is done in several different ways:

Data Synchronization when Accessing the Constant Contact Email Module

When the Constant Contact Email module is accessed for the first time during a DonorPerfect Online session, it performs the following operations:

- The names of all the email campaigns on the Constant Contact website are downloaded from Constant Contact to DPO.
- The details of the 50 most recent email campaigns are downloaded from Constant Contact to DPO, and used to update the Campaign Results screen.
- All of the lists that are stored on the Constant Contact website are downloaded from Constant Contact to DPO.
- All of the contact records for the contacts that appear in the lists on the Constant Contact website are downloaded from Constant Contact to DPO.

Synchronizing Constant Contact Email Module screens

When you access Constant Contact Email, it synchs all of the data in the Campaign Results and List Management tabs with the Constant Contact website. As you use the module, the data for each screen is updated when the screen appears or refreshes. See “Synchronizing Constant Contact Email Module Screens” on page 5 for details.

Field Mapping

The **Field Mapping** tab of the Settings screen allows you to specify up to 10 additional fields to be synched from DonorPerfect Online to Constant Contact, in addition to the fields that are normally shared between the two applications. These fields map to the first 10 Custom Fields for each contact in the Constant Contact website. See “Field Mapping Synchronization” on page 7 for details.

Nightly Database Synchronization

This is a far more comprehensive and resource-intensive sync process. It is usually set up to run overnight as an automated process, using the settings on the Sync Settings screen.



Note: A Nightly Database Sync may also be triggered manually at any given time, but may take more than an hour to complete on some systems.

A number of operations may be performed as part of the Nightly Database Sync, depending on the settings in the DPO Sync Settings screen:

- DPO Constituent records are created for contacts on the Constant Contact website who are not found in the DPO system.
- Contact records are created in DPO for emails that have been sent out from the Constant Contact website if they do not already exist.
- Existing DPO contact records for Constant Contact emails are updated with the current email status.
- Dynamic Update mailing lists on the Constant Contact website are updated to match the current contents of the list in DonorPerfect Online.
- If Field Mapping has been set up, data from DPO is updated to Constant Contact for the selected fields. See “Field Mapping” page 7 for full details on this process.

For full details, see “Nightly Database Synchronization” on page 9.

Performance Limits

We recommend that you use the following rule to keep the number of records that have to be synced manageable:

$$(\# \text{ of Contacts}) \times (\# \text{ of Lists}) < 5,000$$

In other words, the number of contacts in your average email campaign, multiplied by the number of email campaigns, should be less than 5,000.

So, for instance, if you have around 100 contacts in your email campaigns, you can keep 50 campaigns in the system. If you have 200 contacts in your campaigns, you should limit yourself to about 25 campaigns. If you only have 50 contacts in an average campaign, you could have 100 campaigns in the system without going over the limit.

Going over this limit will impact your performance, and greatly increase the duration of the nightly database sync.

Synchronizing Constant Contact Email Module Screens

This section details what information gets updated when the various screens in the Constant Contact Email module are accessed or used.

Campaign Results Screen

The information in the Campaign Results screen is updated as follows:

- When the Constant Contact Email module is first accessed, the following information is downloaded from Constant Contact to DPO:
 - The names of all email campaigns
 - The details for the 50 most recent Campaign Results (so that the Campaign Results page displays up-to-date information)
- If you have more than one page of campaigns, navigating to the next page loads details for the next 50 campaigns, and so on.
- Navigating back to a previous screen does NOT load fresh data from Constant Contact. Instead the information is simply reloaded from cache.
- Clicking the **Refresh Results** button repeats the same sync process that was done when the module was first accessed (see “Data Synchronization when Accessing the Constant Contact Email Module, page 3).
- Drilling down on one of the numbers in the campaign results loads the details for the campaign in question from Constant Contact to DPO.

List Management Screen

The information in the List Management Screen is updated as follows:

- When the Constant Contact Email module is first accessed, the following information is downloaded from Constant Contact to the DPO Constant Contact Email module:
 - The information for all of the lists on the Constant Contact website is downloaded from Constant Contact to DPO.
 - All of the contact records for the contacts that appear in the lists on the Constant Contact website are downloaded from Constant Contact to DPO.
- When the contents of a list are updated in the DPO Constant Contact Email module, the list and all of the constituent records for the contacts in that list are synched from DPO to Constant Contact.

Reports Screen

When a report is run the information for the report is drawn from DPO.

If you want up-to-the-minute data on your email campaigns, you should run a manual Nightly Database Sync before running your reports. See “Manually Running a Nightly Database Sync” on page 9 for details.

Settings Screens

The Settings screens have the following impact on data synchronization:

- The options chosen in the tabs of the Settings screens affect how the sync processes function. However, editing the settings does not trigger a sync, as the setting info is stored in DPO.
- Clicking the **Sync Campaign Results with DPO Now** button triggers a Nightly Database Sync that begins immediately. See “Nightly Database Sync” on page 9 for details.
- Clicking the **Sync History Report** link does not trigger a sync, as the sync data is stored in DPO.

Email Information Section in DPO Main Entry Screen

The **Email Information** section of the Main Entry Screen displays information from the contact record for a constituent on the Constant Contact website. The information in this section is synced between DPO and the Constant Contact website as follows:

- The Email Address can be updated in either DPO or the Constant Contact website, if the constituent is part of a dynamic list. The most recently updated record will be synced to the other application as part of the Nightly Database Sync.



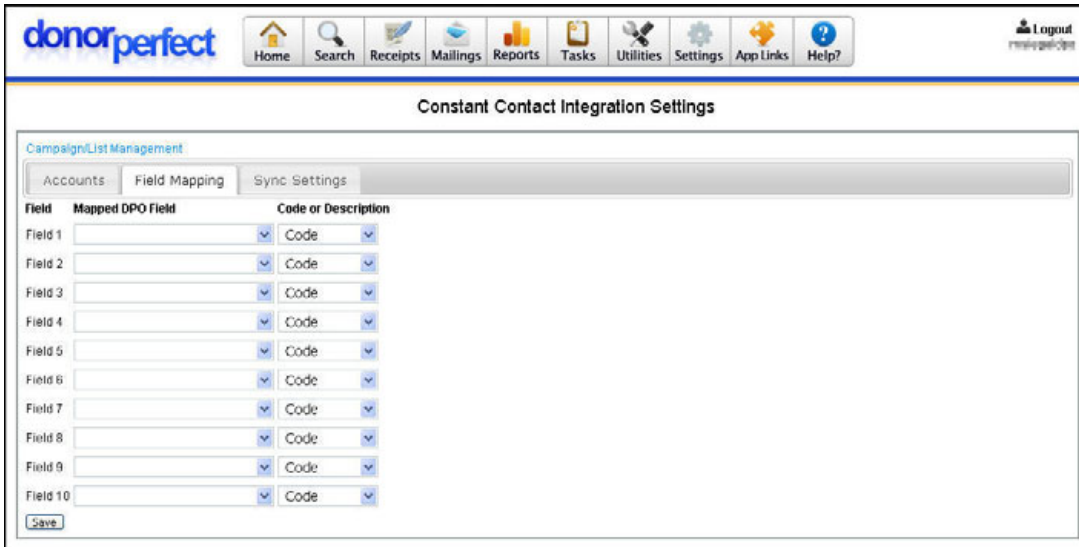
Warning! If the donor is not part of a dynamic list, the email address will not be synced between the applications as part of the nightly sync.

- The Email Status is updated from Constant Contact to DPO as part of the Nightly Database Sync.

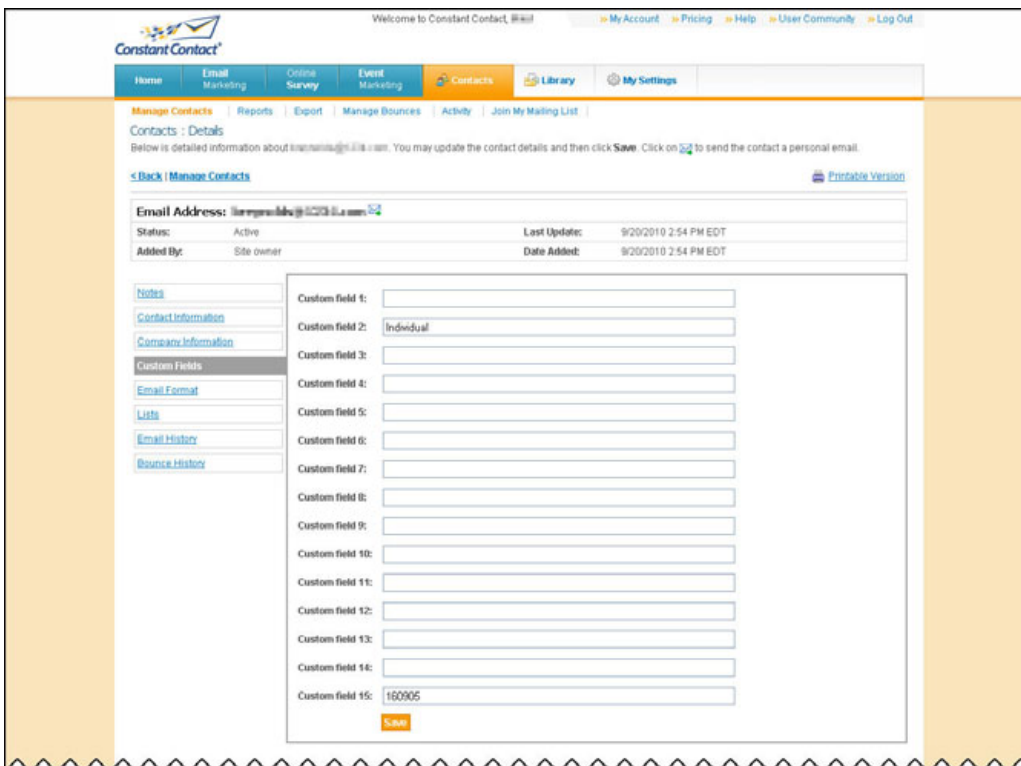


Important! Changes made to the Email Status in DonorPerfect Online will not be uploaded to Constant Contact, and may be overwritten by future updates from Constant Contact. For this reason, you should always edit the Email Status using the Constant Contact website, not DonorPerfect Online.

Field Mapping Synchronization



The **Field Mapping** tab of the Settings screen allows you to specify up to 10 additional fields to be kept in sync between DonorPerfect Online and Constant Contact, in addition to the fields that are normally shared between the two applications.



These fields map to the first 10 Custom Fields for each contact in the Constant Contact website. You can view them from Constant Contact by viewing the **Details** for a contact, then selecting the **Custom Field** tab.

The Field Mapping function syncs data between DonorPerfect Online and Constant Contact according to the following rules:

- Field Mappings only update information in one direction: from DPO to Constant Contact. This has the following effects:
 - If you edit the information in one of the Custom Fields in Constant Contact, that information will not be sent back to DPO.
 - If you edit the information in one of the Custom Fields in Constant Contact, your changes may be overwritten by the next update from DPO.

In short, don't edit the information in the Custom Fields in Constant Contact. Edit the information in DPO instead.

- When a Field Mapping is first set up in DPO, data is not sent from DPO to Constant Contact immediately.
- Field Mappings are only updated at one of two times: when a list is updated and sent to Constant Contact, or during a Nightly Database Synchronization. The following rules determine which records are updated and when:
 - In order for its mapped fields to be updated in Constant Contact, a DPO record must have its **Email Status** (set in the **Email Information** section of the Main Entry Screen) set to **Active**, and it must be included in one or more lists in the Constant Contact Email module.
 - If a DPO record is a member of one or more manual lists, but is not a member of a dynamic list, the information in its mapped fields will only be updated when the list is created, or when the list is updated. It will not be updated as part of the Nightly Database Sync.
 - If a DPO record is a member of one or more dynamic lists, its mapped fields will be updated first when the list is sent to Constant Contact, and then each time the information in the mapped fields changes, in the next Nightly Database Sync.

Nightly Database Sync

The Nightly Database Sync is a much more comprehensive and time-consuming data synchronization that is typically set up to run automatically overnight.

Manually Running a Nightly Database Sync

Clicking the **Sync Campaign Results with DPO Now** button on the Sync Settings screen triggers a Nightly Database Sync that begins immediately.



Warning! Depending on the sync settings and the number of campaigns and contacts in Constant Contact, a manual sync may take more than an hour on some systems.

Enabling the Nightly Database Sync

In order for the Nightly Database Sync to run, you must check the **Enable Nightly Campaign Sync** option on the Sync Settings screen and select the window of time during which the process will begin.

What the Nightly Database Sync Does

A number of operations may be performed as part of the Nightly Database Sync, depending on the settings in the DPO Sync Settings screen

Creating and Updating Constituent Records in DPO

If the **Create New Records in DPO** option is checked, DPO constituent records are created for contacts on the Constant Contact website which are not found in the DPO system. If a constituent record is found that matches the contact record from Constant Contact, then the last modified date is used to determine whether the record will be updated. If the last modified date for the Constant Contact record is newer than the last modified date for the DPO record, then the relevant fields in the DPO record will be overwritten with the matching information from the Constant Contact record.

If the **Create New Records in DPO** option is not checked, the Nightly Database Sync will not create new constituent records in DPO.



Note: For the first Nightly Database Sync that runs after the Constant Contact Email module is installed, the sync process must check every contact record on the Constant Contact website to see if they match an existing DPO record. This adds to the length of the first Nightly Database Sync. The next time the sync process runs, however, it only needs to check the records that have changed since the previous sync. As a result, the performance of the Nightly Database Sync is greatly improved after the first sync.

The following options affect how constituent records are created/updated in DPO:

- By default, contact records in Constant Contact are matched to constituent records in DPO using only email addresses. However, if the **Match records based on Names** option is selected in the Sync Settings screen, records will be matched based on first name, last name, and ZIP code if they do not have email addresses.
- If the **Create Constant Contact “Removed” Records in DPO** option is checked, constituent records will be created for records that are marked as “Removed” on the Constant Contact website. The **Email Status** of the records will be set to **Removed** in DPO. If this option is unchecked, Constant Contact records that are marked as “Removed” will be ignored by the Nightly Database Sync process. This option is only relevant when **Create New Records in DPO** is checked.
- If the **Create Constant Contact “Do Not Mail” Records in DPO** option is checked, constituent records will be created for records that are marked as “Do Not Mail” on the Constant Contact website. The **Email Status** of the records will be set to **Do Not Email** in DPO, and the **Do Not Email** option under Email Information will be checked. The **Do Not Send Mail** option in DPO will not be checked, however, as these records may be OK to receive postal mail. If unchecked, Constant Contact records that are marked as “Do Not Mail” will be ignored by the Nightly Database Sync process. This option is only relevant when **Create New Records in DPO** is checked.
- If the **Create Records without First and Last Name in DPO** option is checked, Constant Contact records that do not have a first and last name listed (just an email address) will have constituent records created for them in DonorPerfect Online. The **Last Name** will be set to the email address of the record, as **Last Name** is a required field. The records will be marked as “DO NOT MAIL” by default, as they lack standard mailing address information. If unchecked, constituent records will not be created for that type of record.
- If the **Update Name & Address Information During Sync** option is checked, DPO constituent records will be updated with data from contact records from Constant Contact as part of every Nightly Database Sync. The fields affected are First Name, Last Name, Address, and Email Address. If unchecked, DPO records are not updated after they are created, except for **Email Status**.

Creating and Updating Contacts in Constant Contact

If a constituent is added to a list in the Constant Contact Email module in DPO, a contact record will be created for them on the Constant Contact website if a matching record is not found. Records are matched using email addresses.

If a matching record is found, then the last modified date is used to determine whether the Constant Contact record will be updated. If the last modified date for the DPO record is newer than the last modified date for the Constant Contact record, then the information in

the Constant Contact record will be overwritten with the matching information from the DPO record.

The type of list determines how often this will be done:

- If a DPO constituent is a member of one or more manual lists, but is not a member of a dynamic list, the corresponding Constant Contact record will only be updated when the list is created, or when the list is updated.
- If a DPO record is a member of one or more dynamic lists, its mapped fields will be updated first when the list is sent to Constant Contact, and then each time the information in the DPO record changes, in the next Nightly Database Sync.

Creating and Updating DPO Contact Records for Constant Contact Email Campaigns

When email campaigns are sent out from the Constant Contact website, the Constant Contact Email module creates separate contact records in DPO for each email message as part of the next Nightly Database Sync. After that, each time the email status changes in Constant Contact, the status of the corresponding DPO contact record is updated to match in the next Nightly Database Sync.

The following options affect the contact records that are created in DPO:

- The **Default Contact “BY_WHOM”** option selects the default contact person from your organization who will be assigned to contact records created by the Constant Contact Email module.
- The **Default Contact “ACTIVITY”** option selects the default activity code that will be assigned to contact records created by the Constant Contact Email module.
- The **Default Contact Comment** will be entered as a comment for contact records created by Constant Contact Email. For instance, “Created by Constant Contact Email module.”

Updating the Contents of Dynamic Lists on the Constant Contact website

During the Nightly Database Sync, Dynamic Update mailing lists on the Constant Contact website are updated to match the current contents of the list in DonorPerfect Online.

The records for all of the contacts in the dynamic lists are also updated from DPO to Constant Contact (see “Creating and Updating Contacts in Constant Contact,” above).

Field Mapping Data Updated on Constant Contact

If Field Mapping has been set up, data from DPO is updated to Constant Contact for the selected fields. See “Field Mapping” page 7 for full details on this process.

Nightly Database Sync Performance Issues

In general, when we talk about performance issues with the Constant Contact Email module, we mean the amount of time that it takes to do a Nightly Database Synchronization.

The following issues have a major effect on Nightly Database Sync performance:

- Large dynamic lists can lead to long sync times, because every contact from every list must be updated from DPO to Constant Contact one at a time.
- The more records in Constant Contact, the longer the sync time.

In addition, the following can also have an effect on Nightly Database Sync times:

- Server load (trying to sync at the same time as many other users)
- Amount of Network Traffic
- Network Communication Issues

Sync Setting Examples

Default Settings

By default, none of the Sync Setting options are enabled.

These settings have the following effects:

- Campaign results will only be synched from Constant Contact to the **Campaign Results** tab when the module is first accessed, or when users navigate to other pages in the Results tab, or when the **Refresh Results** link is clicked.
- There will be no nightly sync, so you will need to trigger a manual Nightly Database Sync using the **Sync Campaign Results with DPO Now** button on the Sync Settings screen in order to do the following:
 - Create/update contact records in DPO for the results of your Constant Contact email campaigns
 - Update the contents of dynamic lists from DPO to Constant Contact
 - Update the contact records on the Constant Contact website for the members of dynamic lists. Field mapping information will also be copied from DPO to Constant Contact if field mapping has been set up.
 - No DPO constituent records will be created or updated to match the contacts on the Constant Contact website. The one exception to this is the **Email Status** field, which will be updated if the Nightly Database Sync is manually triggered.

Basic Nightly Sync

In this scenario, the **Enable Nightly Sync** option is checked, and a **Sync Time** has been selected. In addition, the **Default Contact "BY_WHOM"**, **Default Contact "ACTIVITY"**, and **Default Contact Comment** options have been selected or filled in.

These settings have the following effects:

- A Nightly Database Sync will be performed each night within the selected sync time window. This allows the Constant Contact Email module to do the following:
 - Create/update contact records in DPO for the results of your Constant Contact email campaigns
 - Update the contents of dynamic lists from DPO to Constant Contact
 - Update the contact records on the Constant Contact website for the members of dynamic lists. Field mapping information will also be copied from DPO to Constant Contact if field mapping has been set up.
- No DPO constituent records will be created or updated to match the contacts on the Constant Contact website. The one exception to this is the **Email Status** field, which will be updated as part of the Nightly Database Sync for those constituents whose email addresses match contacts' email addresses on the Constant Contact website.

Full-Featured Sync

In this scenario, all options have been enabled, and a **Sync Time** has been selected. In addition, the **Default Contact "BY_WHOM"**, **Default Contact "ACTIVITY"**, and **Default Contact Comment** options have been selected or filled in.

These settings have the following effects:

- A Nightly Database Sync will be performed each night within the selected sync time window. This allows the Constant Contact Email module to do the following:
 - Create/update contact records in DPO for the results of your Constant Contact email campaigns
 - Update the contents of dynamic lists from DPO to Constant Contact
 - Update the contact records on the Constant Contact website for the members of dynamic lists. Field mapping information will also be copied from DPO to Constant Contact if field mapping has been set up.
- DPO constituent records will be created or updated to match the contacts on the Constant Contact website. The following rules will apply:
 - If the email address of an existing DPO constituent record matches the email address of a contact record on the Constant Contact website, and the last modified date of the Constant Contact record is more recent than the DPO

record, the first name, last name, address, email address and email status fields will be updated with information from the Constant Contact website.

- If no DPO constituent records are found that match the email address of a contact record on the Constant Contact website, the DPO Constant Contact Email module will attempt to match the record using the first name, last name, and ZIP code fields. If a match is found, the first name, last name, address, email address and email status fields will be updated with information from the Constant Contact website.
- If no constituent records are found that match the email address or first name/last name/ZIP code fields, a new DPO constituent record will be created using the information from the contact record in Constant Contact. The following rules will apply:
 - If the contact record in Constant Contact lacks a first and last name, the email address will be used as the last name in DPO, and the record will be marked as **Do Not Send Mail** in DPO.
 - If the contact record in Constant Contact had a **Removed** status, the **Email Status** of the DPO constituent record will also be set to **Removed**.
 - If the contact record in Constant Contact had a **Do Not Mail** status, the **Email Status** of the DPO constituent record will also be set to **Do Not Mail**, and the **Do Not Email** option under **Email Information** will be checked. The **Do Not Send Mail** option in DPO will not be checked, however, as these records may still be good to receive letters via postal mail.