

Synergy Enterprise & Constant Contact



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Goals

- Use Constant Contact for Newsletters for Customers / Prospects or Other Accounts
- Make the Process Simple to Create and Distribute Newsletters
- Ensure Compliance with the Can-Spam Act
- Identify Which Newsletters, an Account / Contact Person is to Receive
- Keep the Marketing Budget Low for Newsletters
- Make Professional / Useful Newsletters

Contact Cards

- Ensure that the Following Synergy Fields are Used and Kept Updated within a Contact Card:

- E-mail
- Valid email address
- Email permission

E-mail	dkloepfer@donas.com
Valid email address	Yes
Email permission	Yes

- The “E-mail” is necessary to use Constant Contact as the Delivery Tool.
- The “Valid email address” field of a Contact Person is necessary for the exporting of this data (Excel) into Constant Contact from a Synergy Search.
- The “Email permission” field provides protection to keep your organization safe from Spamming Laws. It is used in the Exporting of this data (Excel) into Constant Contact from a Synergy Search.

Contact Cards

- Additional Free Fields may be Used to Select Which Types of Newsletters or Products that a Contact Person Should Receive. These would typically be Yes / No Fields in Synergy. In my Database, I use the following:

- e-Mail Weekly Newsletter
- e-Mail Operations Newsletter





e-Mail Weekly Newsletter?







e-Mail Operations Newsletter?

- Other Fields that may be useful, could be a Date Field, when You are notified by Constant Contact or the Account that they wish to stop receiving e-mail newsletters.

Contact Card

SynergyExpert.com Jack McBean  

Accounts 902 + Create Modules

Contact: Sharon Topper      

X Close Edit New Create letter Create email New Request Validation vCard Notes

Customer: **Bike O'Rama**
 Status: **Active** Rating: **7**
 Created by Jack McBean 01/21/2015 09:08
 Modified by Jack McBean 04/12/2017 11:23

Contacts

Name: MS. Sharon Topper
 Status: **Active**
 Job description: Sales Manager - East Coast
 Job title: Sales
 Gender: Female
 Extension: 543
 Mobile: 857-490-9500
 Additional Phone #1:
 Additional Phone #2:
 E-mail: dkloepfer@donas.com
 Valid email address: Yes
 Email permission: Yes
 Language: American English

Addresses

Address: 8976 McDonald Expressway Map (3)
 City: Quincy
 State / Zip code: Massachusetts 02169
 Country: United States of America
 Direct Phone:
 Fax:


Marketing

Account manager: Ryan Shellhouse
 Job title (Account manager): Sales Manager
 Manager (Contact): Ryan Shellhouse (Employee)
 Portal access: Yes, TOPP31, Active

Links

Type	Account	Job description	Direct Phone	Mobile	E-mail

Picture




Remarks




Loves Italian Food [Jack McBean 07/17/2015 13:07 (GMT -05:00)]

Free fields

Next Follow-Up Date: 04/27/2017
 Last Date Contacted: 04/25/2017
 Qty of Calendars: 1.00
 Reports To: Sam Joaner
 Send Calendar:
 e-Mail Weekly Newsletter?:
 e-Mail Operations Newsletter?:
 Spouse Name: Ron
 Children: Bev / Dan / Colin
 Other Contact Specific Data:
 Callback in Number of Days: 14

Workflow  Documents

External References Add

Type	Link
	dkloepfer@donas.com
	frank@donas.com
	https://www.linkedin.com/profile/view?id=27736873&authType=N

Add



Synergy Search To Allow Excel Export of Data

- Use the “Accounts: Search – Contacts” in Synergy to Assist You in Searching and Exporting the Data into Constant Contact.
- I Recommend the Use of Saved Templates in the Search to Make it Simpler (Faster) to Search and Export Data.
- Select Fields similar to my Example in Your Search.



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Accounts: Search – Contacts (Search)

SYNERGYEXPERT.COM Jack McBean Settings Info

Contacts

Accounts: Search - Contacts Close Show Reset Account Count Print Star Help Refresh

General

Account type: Associate Prospect Customer Supplier Reseller Division Bank Not validated Lead Suspect

Status: Active Blocked Inactive Not validated Passive Pilot Reference

Contact

Contact: Direct Phone

Contact: E-mail

Valid email address:

Email permission:

Only main contact:

e-Mail Weekly Newsletter?:

e-Mail Operations Newsletter?:

View

Include: Contacts (All)

Columns

Account name	Contact: First name	Contact: Last name	Contact: E-mail
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Synergy Results To Allow Excel Export of Data

- In Order to Capture All of the Data Required in an Export as Demonstrated in this Document, it is Necessary to Change the Page Size that will include all of your possible Results. In this Example, you may wish to increase the number on the page from 200 to 2,000.

The Excel Export Discussed in the Next Few Screens Will Only Display the Number of Records Displayed on a Single Page.

- I Recommend the Use of Saved Templates in the Search to Make it Simpler (Faster) to Search and Export Data.

Accounts: Search – Contacts (Results)

Accounts: Search - Contacts

Valid email address: Yes
Only main contact: No
Email permission: Yes

Include: Contacts (All)

Page size: 20/20 Show

Account name	Contact: First name	Contact: Last name	Contact: E-mail
AAA Bikes	Ronni	Gator	
AAA Bikes	Susan	Polls	sp@donas.com
AAA Bikes	Sammy	Waters	
Behind Bars Bicycle Shop	Laura	Jlmer	lj@donas.com
Bicycle Chain	Harry	Bellows	hb@donas.com
Bicycle Link	Raymond	Janson	rj@donas.com
Bike Connection	Holly	Powers	hpowers@bc.net
Bike O'Rama	Sally	George	busyjane@ca.rr.com
Bike O'Rama	Sam	Joaner	
Bike O'Rama	Sharon	Topper	dkloepfer@donas.com
Bike O'Rama	Janet	White	jw@donas.com
Bike O'Rama	Cameron	Wood	ce@donas.com
Cycle Scene	Gene	Danall	Gdanall@cyclescene.com
Cycle Scene	James	Sunderland	js@donas.com
Cycle Scene	Randall	White	rw@donas.com
Cycle Scene	Randall	White	rw@donas.com
Family Bike	Dan	Larcer	dl@familybike.com
Grand Cycle, Inc.	David	Johnson	dj@grandcycle.com
High Gear	Bart	Smalley	Bart@highgear.net
I Cycle Bike Shop	Harold	Johnsten	Harold@icycle.net
Key Bank	Robert	Sands	RSands@donas.com
Key Bank	Ann	Weber	ann@donas.com
Main Street Bicycles	John	Barrister	johnb@mainstreet.com
Midwest Cyclery	Roberto	Gerris	roberto@mc.net



Exporting of Data into Excel

- A Resource with the Correct Security Role and Function Rights has a Button that directly will take the data shown in the Screen into Excel. It is Important that the Number of Records to be Displayed is Less Than the Page Size Described Previously.

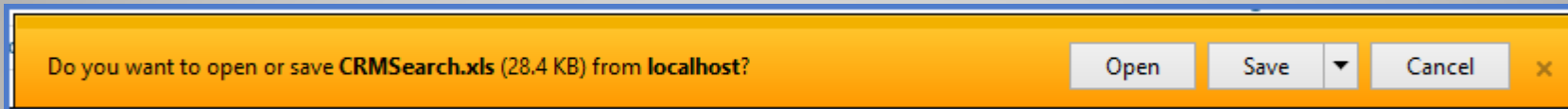
- Use the Excel Icon for the Export Process.



- Once the Search Results are Displayed, You may Notice that Some Contacts May Not Have an E-Mail. These Can Be Sorted and Managed in Excel, Eliminating Those Contacts.

Saving of Data in an Excel File

- Once You Select the Excel Icon, You Should See a Message that Looks Similar to this Example.



- I Recommend Using the Save As function and Saving it to a Drive that you may Access the Excel Spreadsheet. Newer Browser Security May Prohibit You from Opening the File Before Saving.

Saving the Search Results into Excel

The screenshot shows a web application interface with a 'Save As' dialog box open. The dialog box is titled 'Save As' and shows the current location as 'Desktop'. The file name is 'Excel CC File 04-28-2017' and the save as type is 'Microsoft Excel 97-2003 Worksheet (*.xls)'. The background shows a search results table with columns for Name, Size, Item type, and Date modified.

Name	Size	Item type	Date modified
Libraries			
Administrator			
Computer			
Network			
ASIMport Background		File folder	12/17/2016 1:33 PM
CRM Install		File folder	2/25/2017 12:55 PM
Customer Portal Order Entry		File folder	4/13/2017 7:52 AM
Document Import Tool Files		File folder	3/16/2017 8:18 PM
GFW		File folder	2/16/2017 9:14 AM
GLM 10-4-3 Installers		File folder	4/13/2017 7:18 AM
New folder		File folder	4/18/2017 10:05 AM
Presentations for Demos		File folder	4/13/2017 7:14 AM
exact event manager	1 KB	Internet Shortcut	12/17/2016 1:20 PM
Applicant	1 KB	Internet Shortcut	3/23/2017 8:51 PM
Phone Interface	1 KB	Internet Shortcut	10/19/2016 7:56 AM
Rebuild Repository in ESE	1 KB	Internet Shortcut	10/19/2016 7:48 AM
SSRS Report Manager	1 KB	Internet Shortcut	7/12/2016 6:09 PM

File name: Excel CC File 04-28-2017
Save as type: Microsoft Excel 97-2003 Worksheet (*.xls)

Do you want to open or save CRMSearch.xls (28.4 KB) from localhost? [Open] [Save] [Cancel]

Review of Data in an Excel File

- Open Excel and You Should See a Screen Similar to the one on the next page.
- Delete the Headings of the File, in this Example Rows 1 through 9. Keep Row 10 and Below.
- Using Excel Sorting, Eliminate the Records that Do Not Match Your Criteria, Such as Having an e-Mail Address.
- Save this file, as We Could use it Later for an Import of a Note Stating that an e-Mail Was Sent to this Contact on a specific Date, if Desired.

Excel File

Excel CC File 04-28-2017.xls - Microsoft Excel

Administration 001 McBean Bike

Administration 001 McBean Bike
Date April 28 2017 By Jack McBean

Accounts: Search - Contacts

Valid email address Yes Email permission Yes
Only main contact No
Include: Contacts (All) v

Page size 200 Show

Account name	Contact: First name	Contact: Last name	Contact: E-mail
AAA Bikes	Ronni	Gator	
AAA Bikes	Susan	Polls	sp@donas.com
AAA Bikes	Sammy	Waters	
Behind Bars Bicycle Shop	Laura	Jimer	lj@donas.com
Bicycle Chain	Harry	Bellows	hb@donas.com
Bicycle Link	Raymond	Janson	rj@donas.com
Bike Connection	Holly	Powers	hpowers@bc.net
Bike O'Rama	Sally	George	busyjane@ca.rr.com
Bike O'Rama	Sam	Joaner	
Bike O'Rama	Sharon	Topper	dkloepfer@donas.com
Bike O'Rama	Janet	White	jw@donas.com
Bike O'Rama	Cameron	Wood	ce@donas.com
Cycle Scene	Gene	Danali	Gdanali@cyclescene.com
Cycle Scene	James	Sunderland	js@donas.com
Cycle Scene	Randall	White	rw@donas.com
Cycle Scene	Randall	White	rw@donas.com
Family Bike	Dan	Larcer	dl@familybike.com
Grand Cycle, Inc.	David	Johnson	dj@grandcycle.com
High Gear	Bart	Smalley	Bart@highgear.net
I Cycle Bike Shop	Harold	Johnsten	Harold@icycle.net
Key Bank	Robert	Sands	RSands@donas.com
Key Bank	Ann	Weber	ann@donas.com
Main Street Bicycles	John	Barrister	Johnb@mainstreet.com
Midwest Cyclery	Roberto	Gerris	roberto@mc.net
Minneapolis School of Medicine	John	Backer	JB@msoe.com
National Bicycle Dealers Association	James	Moore	JM@nbda.com
OSF Hospital	Robert	Jorgensen	rj@osf.com
Outdoor Adventure Outlet	David	Graham	
Outdoor Adventure Outlet	James	Graham	
Outdoor Adventure Outlet	Justin	Ketalk	justin.ketalk@ebkbeonline.com



Using Constant Contact to Create Newsletter

- Open Constant Contact
- Delete Previous Mailing List
- Enter New Contacts as a Mailing List Using the Excel File to Upload
- Create Newsletter
- Send Newsletter
- Review Opt-Outs and Manage in Synergy Contact Cards
- Review Status of Clicks and Further Follow-Up by Newsletter Receivers

Saving Contacts into Constant Contact

- In Constant Contact, You are Billed per Number of Contacts within Your Mailing Lists Normally. I Manage the Number of Lists / Contacts to Keep My Budget Low.
- For Every Mailing that We Create and Distribute, A New Mailing List is Created from the Excel File Previously Discussed. Any Old Mailing Lists are Deleted from Constant Contact Manually.



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Managing Contacts for Opt-Outs

- Any Contacts that Have Expressed an Interest to Opt-Out of Future Mailings Can Be Found in Constant Contact.

These Contacts Need to Be Managed in Synergy Through the Use (Manually Modifying the Value) of the Fields Displayed on the Contact Card and Described Earlier.

Synergy Workflow for Marketing Campaigns

- Some Accounts Want to Manage and Track Each Newsletter Being Sent and Tracking All Activities That Are Occurring as a Result of the Campaign. If You Want This Functionality, Then Create a Workflow Request from the Excel File and Use That to Designate Which Contacts Received the Newsletter.
- As a Manual Process, This Will Be Time Consuming. We Recommend Using a Workflow Request, Similar to the Example on the Next Page. Use the GLM Systems Tool for Creating Workflow Requests from an Excel File to Manage the Upload Process.
- You may use the Fields for Tracking Requirement Needs from the Newsletter to Assist in Managing the Effectiveness of the Campaign.

Synergy Workflow for Marketing Campaigns

The screenshot displays a web browser window with the URL `http://localhost/synergy/docs/Portal.aspx`. The page title is "Campaign Attendance - New". The interface includes a navigation bar with "Contacts" and a search icon, and a user profile for "Jack McBean". The main form area contains the following fields and options:

- Buttons: Close, Create, Edit, Draft
- Workflow: Create (selected), Approve
- User: Jack McBean, 04/28/2017 15:21
- Role: Person
- Sales Person: 1 — Jack McBean — Division General Manager — McBean Bike
- Description: Attendance at Trade Show
- Project: [Text Field]
- Opportunity: [Text Field]
- Event Date: [Calendar Icon]
- Account: [Text Field]
- Contact: [Text Field]
- Interest Level: [Dropdown Menu]
- Document: [Text Field]
- Remarks: Request
- Timestamp: [Text Field]
- Full screen: [Text Field]

The Windows taskbar at the bottom shows the time as 3:22 PM and includes icons for various applications like Chrome, Word, and Excel.



Synergy Projects for Marketing Campaigns

- In Addition to the Synergy Workflows Discussed Previously, You May Wish to Create a Marketing Campaign. In This Project, You Will be Able to View:
 - All Workflows Related to the Newsletter,
 - A Workflow Request to Showcase Which Contacts Expressed Opt-Out,
 - A Synergy Document That is the Newsletter,
 - Excel Spreadsheet Used for the Newsletter Campaign.

Synergy Projects for Marketing Campaigns

The screenshot shows a web browser window displaying the SynergyExpert.com interface. The browser's address bar shows the URL `http://localhost/synergy/docs/Portal.aspx`. The user is logged in as Jack McBean. The main content area displays details for a project with ID 74.002, titled "Marketing to Customers / Prospects". The project is managed by Jack McBean and is currently active, with a start date of 11/10/2016 and an end date of 12/10/2017. The interface includes a navigation menu with options like "Accounts", "Workflow", "Documents", "Opportunities", and "Reports". A "Free fields" section lists various data fields such as "Step 1 / Completed Step 1" through "Step 5 / Completed Step 5", "New Long Text Field", "Free GUID 20 for Request", "File Path", and "Sample Selection Drop Down". At the bottom, there is a table with columns for Name, Job title, Division, Country, Start date, End date, and Action. The table contains one entry for Jack McBean, Division General Manager, at McBean Bike in the United States of America.

Project: 74.002 - Marketing to Customers / Prospects

Created by Jack McBean 11/10/2016 11:55
Modified by Jack McBean 11/10/2016 11:55

General

Code: 74.002
Description: Marketing to Customers / Prospects
Security level: Internal - 10
Manager: Jack McBean
Start date — End date: 11/10/2016 — 12/10/2017
Status: Active

Accounts Workflow Documents
Opportunities Reports

Free fields

- Step 1 / Completed Step 1: NO
- Step 2 / Completed Step 2: NO
- Step 3 / Completed Step 3: NO
- Step 4 / Completed Step 4: NO
- Step 5 / Completed Step 5: NO
- New Long Text Field
- Free GUID 20 for Request
- Free GUID Field 25 - Accounts
- File Path
- Sample Selection Drop Down

Members Child projects Workflow Remarks

Name	Job title	Division	Country	Start date	End date	Action
Jack McBean	Division General Manager	McBean Bike	United States of America	11/10/2016	12/10/2017	Edit



Constant Contact

- Constant Contact Does a Great Job at the Creation, Scheduling and Reporting on Activities. Reporting includes:
 - Open Rate
 - Click Through Rate
 - Bounce Rate
 - Unsubscribe Rate
- This Reporting within Constant Contact Provides Drill-Down to Each of these Marketing Campaign to Look for Trends.



More Information

Please contact us to schedule a demo or
receive additional information on our tools

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