Installing & Configuring
Constant Contact for Salesforce

For **Professional** & **Group** Editions

This guide is to help you install Constant Contact for Salesforce. It is recommended that you read this document and follow the steps closely. You should note that some configuration steps may vary depending on the version of Salesforce that you are running. (*Professional*, *Group, Enterprise,* or *Unlimited)*

Step 1: Install Constant Contact for Salesforce.

1. Log into your Constant Contact account.
2. Click the **Contacts** tab.
3. Select **Import Tools** from the **My Contacts** section of the screen.
4. Click **Salesforce.**
5. Click **Go to AppExchange** this will bring you to a page within the *Salesforce App exchange*.
6. Click the **Get It Now** button.
7. Click production for the environment.
8. You will be prompted to log in to your Salesforce account.
9. After you log into your Salesforce account follow the installation instructions within Salesforce.

Note: During the installation, you will be asked if you want to ignore "Apex test failures" You will need to check this box.


Step 2: Add the Upload to CTCT button for Contacts.

1. Click **Setup** at the top of the page
2. Under the **App Set-up** section of the menu click **Customize> Contacts>Search Layouts**
3. On the **Search Layouts** page look for the layout column and locate **Contacts List View**.
4. Click **Edit**.
5. You will see two columns, **Available Buttons** and **Selected Buttons**.
   -Select **Upload to CTCT** in the **Available Buttons** list.
   - Click **Add Button** and then click the **Save** button to make your changes complete.

Step 3: Add Campaign History for Contacts

1. Click **Setup** at the top of the page.
2. Under the App Setup section of the menu click **Customize> Contacts> Page Layouts**
3. Look for **Contact Layout** and Click **Edit**
4. In the right hand portion of the page, click **VisualForce** Pages in the upper right portion of the page
5. Drag the **ContactCampaign** item to a single column of the page.
6. Click the edit properties wrench 🔧 to change how the page appears to the user
   - It's recommended that you use the following settings
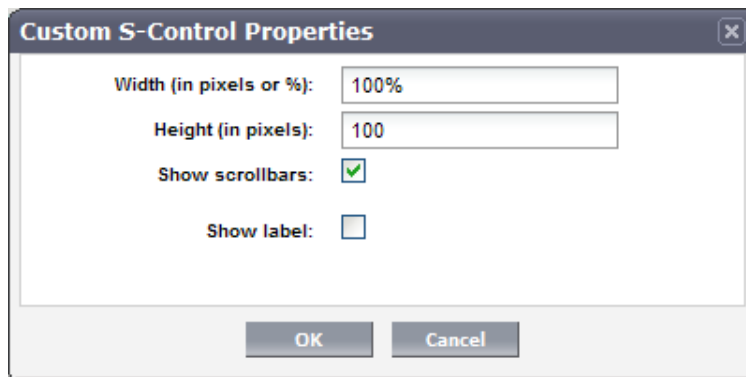
7. Click **OK** to save your settings

Step 4: Set the Email Optout Field for Contacts:

This step is necessary for placing an optout field into the contact details page. This will help ensure that the user can manage and maintain an up-to-date list of members who have opted out of your subscription.
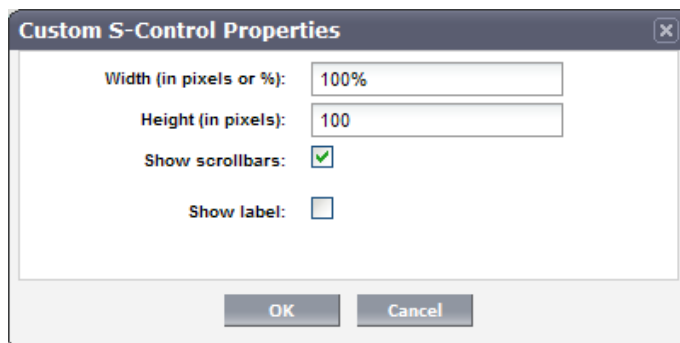
1. Click on **Setup** at the top of the page.
2. On the left hand side of the page under **App Setup,** click **Customize > Contacts> Page Layouts.**
3. Click on **Edit** next to the name, **Contact Layout**
4. Locate **Email Optout** from the **Contact Layout** section and drag it into the **Contact Information** Section.
5. Click **Save** in the Pay Layout Properties

Step 5: Add the Upload to Constant Contact Button for Leads

1. Click **Setup** at the top of the page.
2. Under the **App Set-up** section of the menu click **Customize> Leads>Search Layouts**.
3. On the Search Layouts page look for the layout column and locate **Leads List View**.
4. Click **Edit**.
5. You will see two columns, **Available Buttons** and **Selected Buttons**.
   -Select **Upload to CTCT** in the **Available Buttons** list.
   - Click **Add Button** and then click **the Save button** to make your changes complete.

Step 6: Add Campaign History for Leads

1. Click **Setup** at the top of the page.
2. Under the App Setup section of the menu click **Customize> Leads> Page Layouts**
3. Look for **Leads Layout** and Click **Edit**
4. In the right hand portion of the page, click **VisualForce** Pages in the upper right portion of the page.
5. Drag the **Lead Campaign** item to a single column of the page.
6. Click the edit properties wrench 🔧 to change how the page appears to the user.
   - It's recommended that you use the following settings

Step 7: Set the Email Optout for Leads

This step is necessary for placing an optout field into the lead details page. This will help ensure that the user can manage and maintain an up-to-date list of members who have opted out of your subscription.

1. Click on **Setup** at the top of the page.
2. On the left hand side of the page under **App Setup,** click **Customize > Leads> Page Layouts.**
3. Click on **Edit** next to the name, **Lead Layout**
4. Locate **Email Optout** from the **Lead Layout** section and drag it into the **Lead Information** Section.
5. Click **Save** in the Pay Layout Properties