

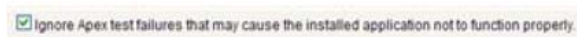


This guide is to help you install Constant Contact for Salesforce. It is recommended that you read this document and follow the steps closely. You should note that some configuration steps may vary depending on the version of Salesforce that you are running. (*Professional, Group, Enterprise, or Unlimited*)

## 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.

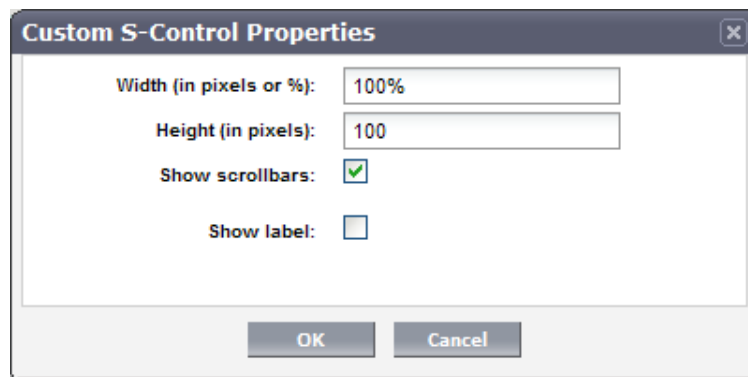


## Step 2: Add the Upload to CTCT button for Contacts.

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 Opt-out Field for Contacts:


This step is necessary for placing an opt-out 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.

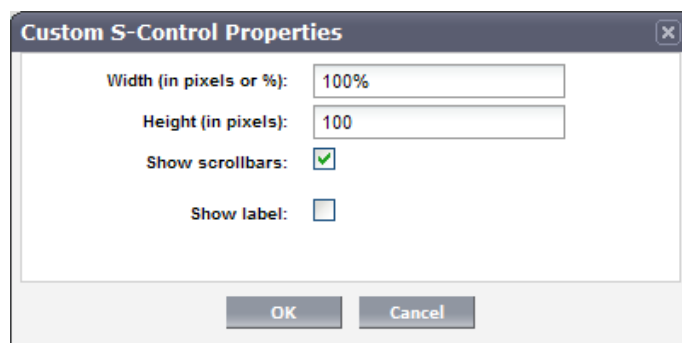
1. Click on **Setup** at the top of the page.
2. On the left hand side of the page under **App Setup**, click **Customize > Contacts > Page Layouts**.
3. Click on **Edit** next to the name, **Contact Layout**
4. Locate **Email Optout** from the **Contact Layout** section and drag it into the **Contact Information** Section.
5. Click **Save** in the Pay Layout Properties
6. On the left-hand side of the page, click **Fields** in **AppSetup > Contacts**.
7. Click **Edit** next to **Edit Email Optout** located in the **Contact Standard Fields** section of the page.
8. On the next page click on the **Set Field-Level Security** button.
9. Click on the **Visible** Check box and click the **Save** button to save your changes.

## 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



7. Click **OK** to save your settings

## Step 7: Set the Email Optout Field 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

6. On the left-hand side of the page, click **Fields** in **AppSetup > Leads**.
7. Click **Edit** next to **Edit Email Optout** located in the **Lead Standard Fields** section of the page.
8. On the next page click on the **Set Field-Level Security** button.
9. Click on the **Visible** Check box and click the **Save** button to save your changes.

## Step 8: Configure Profile Permissions, Apex Classes, and Visualforce Pages

If you use Salesforce Enterprise or Unlimited Editions you must also configure the following:

- Profile Permissions
- Apex Classes
- Visual Source Pages

### To set the Profile Permissions:

1. Click **Setup** at the top of the page
2. In **Administration Setup** click **Manage Users**
3. Click **Profiles**
4. Select the profile you want to set and click **Edit**
5. Set the profile and object permissions
  - a. Scroll down the page until you see the section, **Standard Object Permissions**
  - b. Confirm that, at a minimum, the following Standard Object Permissions are set.

Object type	Permission Level.
Contacts	Read
Leads	Read

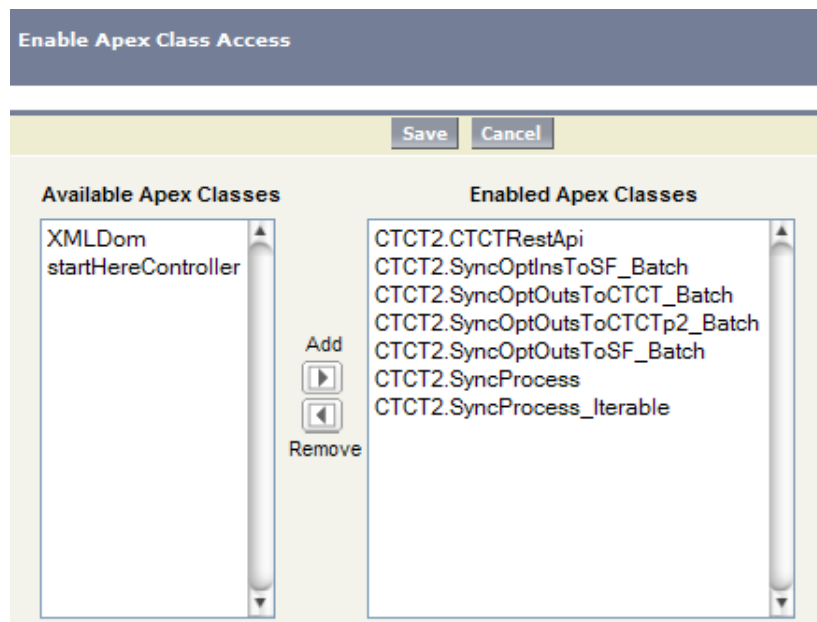
- c. In the next section of the page, set **Custom Object Permissions**
- d. Confirm that at a minimum the following Custom Standard Permissions are set.

Object type	Permission Level.
Constant Contact Agreements	Read
Constant Contact History	Read
Constant Contact Mappings	Read, Create, Edit
Constant Contact Settings	Read, Create, Edit

6. Click **Save**

#### To set the Apex Classes:

1. Back on the **Profiles** page, click the name for the profile you want to set
2. Scroll down the page until you see **Enabled Apex Class Access**
3. Click **Edit**
4. You will see two columns, **Available Apex Classes** and **Enabled Apex Classes**
5. Ensure that the following Apex classes are enabled.
  - CTCT2.CTCTRestApi
  - CTCT2.SyncOptInsToSF\_Batch
  - CTCT2.SyncOptOutsToCTCT\_Batch
  - CTCT2.SyncOptOutsToCTCTp2\_Batch
  - CTCT2.SyncOptOutsToSF\_Batch
  - CTCT2.SyncProcess
  - CTCT2.SyncProcess\_Iterable
6. Click **Save**



**To set the Visualforce Pages:**

- a. Back on the profile page scroll down to the **Enabled Visual Page Access** section
- b. Click **Edit**
- c. You will see two columns, **Available Visualforce Pages** and **Enabled Visualforce Pages**.
- d. Ensure that the following **Visualforce Pages** are enabled.
  - CTCT2.ContactCampaignHistory
  - CTCT2.LeadCampaignHistory
  - CTCT2.LicenseAgreement
  - CTCT2.Schedule
  - CTCT2.Setup
  - CTCT2.SignUp
  - CTCT2.SyncHistory
  - CTCT2.UploadContacts
  - CTCT2.UploadHistory

