

Directions to Integrate The Edge with Your Constant Contact Account

Introduction

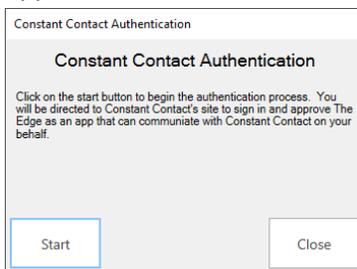
The Edge can directly upload your customer mailing lists for use in **Constant Contact**. This requires an active account with Constant Contact and is subject to their terms, conditions, and pricing. To start a 30-day trial or open a new account with Constant Contact and get all the features of the Drive Retail/Constant Contact program, including access to 450+ free professionally designed and jewelry-specific email templates, click this link: <https://www.constantcontact.com/partner-offer?pn=driveretail&promotionalCode=CODE&intent=try>

Setup

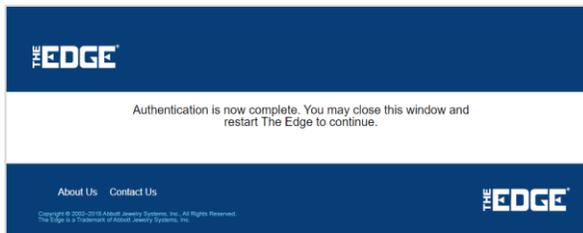
You must have an active **Constant Contact** account before proceeding. If you do not, you can register for one by clicking **Clientele > Online Marketing > Website**.

To authorize **Edge** to upload to your account:

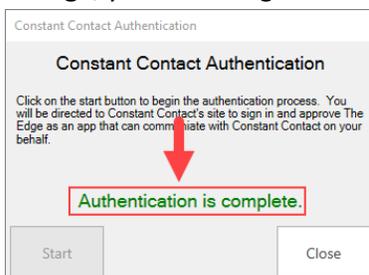
1. Click **Clientele > Online Marketing > Authenticate**. The **Constant Contact Authentication** window will appear.



2. Click **Start**. This will bring you to the **Constant Contact** website and ask you to log in.
3. After logging in, you will see this confirmation page that authentication is complete.



4. In **Edge**, you will also get confirmation.

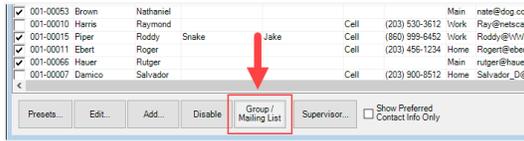


5. Click **Close**. You can now begin using this feature.

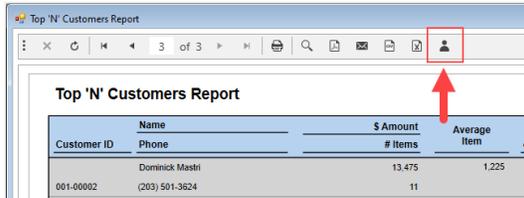
Uploading Customers

Before you can upload customers you must add them to a **Mailing List**. There are three ways you can do this:

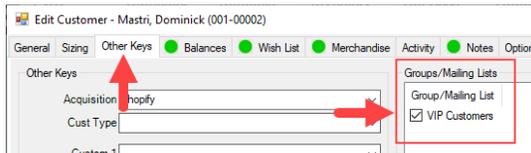
- From a **Customer List**, click the **Group / Mailing List** button at the bottom. You can use this in conjunction with checkboxes to individually select which customers to include.



- From any **Customer Report**, click the **Mailing** button at the top.



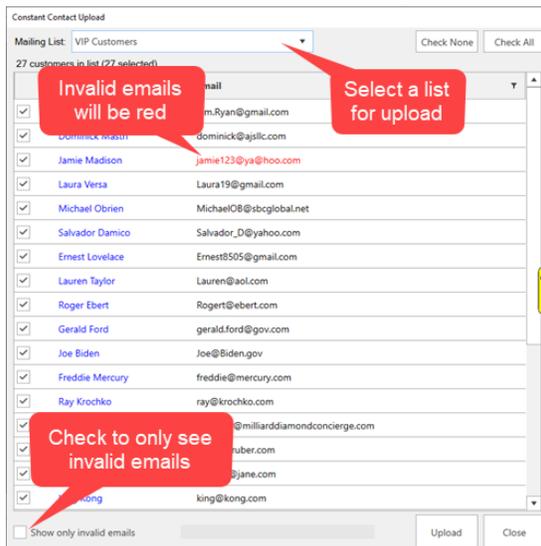
- From the **Customer Record**, click the **Other Keys** tab and select the list(s) you want to add them to.



For more information on working with **Mailing Lists** see our [Knowledgebase Article](#).

To upload your **Mailing List** to **Constant Contact**:

1. Click **Clientele > Online Marketing > Upload Group**. The **Constant Contact Upload** form will appear.



2. Use the drop-down at the top to select a list.
3. All the customers from the list will appear. If any have invalid emails, they will appear in red. Use the **Show only invalid emails** checkbox to only see these.
4. If you need to make any changes, click on the customer's name to open their customer record.

5. Check the customers you want to include and click **Upload**.
6. Once the upload is complete, your list will appear under the **Contacts** section on **Constant Contact**.

