![JoomConnect Logo - If it's not in your website, then it didn't happen!]

Quick Campaign Pro Documentation

1. To start the process ensure that the contacts whom you want to receive the mailing have all been added to the marketing group in ConnectWise.

Note: If there are contacts that should not receive email from either MailChimp or Constant Contact then ensure that the contact is not in the marketing group.or you can check the No Email option on the contact (this will exclude them regardless if they are added to the marketing group or not)

	Company	First Name	Last Name	Email	No Email
☐		michael	casta	*michael.casta@joomconn	
☐	JoomConnectingTesting	Michael	Casta	michael.casta@joomconn...	✉

This setting can be updated by checking the "Do not send E-mails to this contact" option under the Profile tab for a contact in ConnectWise.

Notes	**Profile**	Opportunities	Tracks	Activities	Service	Documents	Groups	Other	Projects

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ⓘ Updated: 6/6/2013 5:24PM by MichaelC

|				
Nickname:		Address:	UPDATE ADDRESS	↩
Gender:	M ◉ F ○			
School:		City:		
Birthday:	▾	State:	▾	
Married:	☐	Zip:		
Children:	☐	Country:	United States ▾	
Significant Other:				
Anniversary:	▾			
Marketing Manager:	☑ Do not send E-mails to this contact.			
Photo:			Browse... ✕ 👤	

2. **Create the campaign** to track opens and clicks in ConnectWise.
   Go to Marketing; Marketing Campaign; click the New Icon

Marketing

Marketing Manager

Marketing Campaign
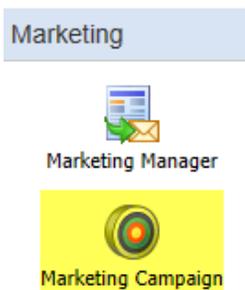
The yellow highlighted areas are required.   If you do not have a Campaign Type and Sub-type you can set these up in the Setup Tables; Opportunities.

3. Then **create the list and campaign** in MailChimp or Constant Contact.
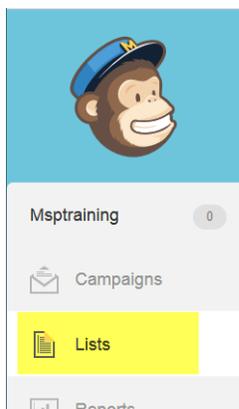

4. In order to sync the changes made in ConnectWise into JoomConnect **perform a sync**.   Login to the backend of your website or JC Anywhere site. Go to components, JoomConnect; Configuration. Click the Sync with CW button.
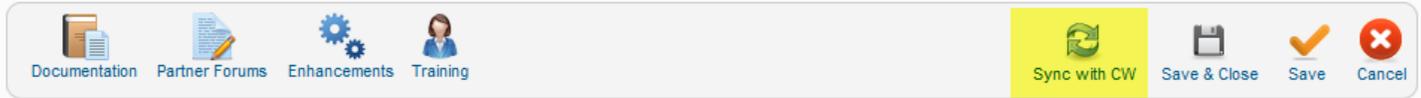
5. Next you will need to **sync the marketing group**.   In JoomConnect go to Groups and Tracks; Marketing Groups, click the Red publish button for the marketing group (it will turn green when successful).
   Next go Quick Campaign Pro and click the **Sync Group** button. Once the lytebox window opens, select the marketing group and click Sync Contacts. This will update all the contacts in JoomConnect who are in the marketing group within ConnectWise.
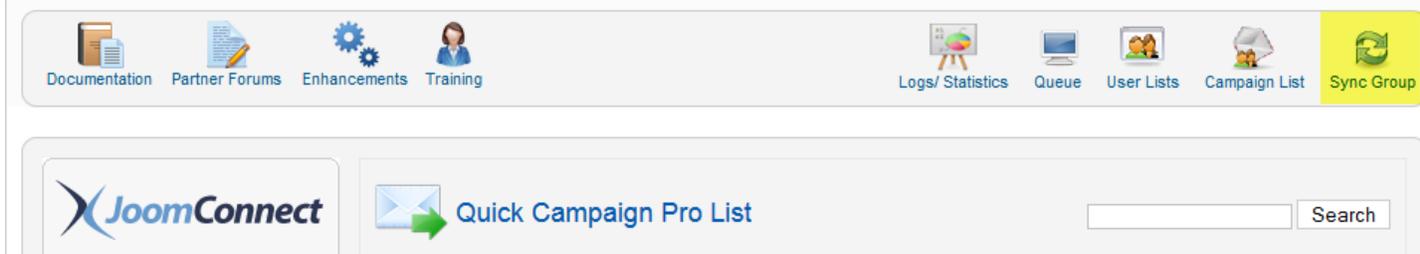

6. You will need to confirm that all the contacts in the marketing group have a portal password.   A password for a contact is a requirement for both the MailChimp and Constant Contact API.   To confirm your contacts, in JoomConnect go to **Contact Management**, select the marketing group, click search. If any contacts appear here they either don't have an email address, a password or both.   You can easily generate passwords for the contacts by selecting them, select the portal security level, make No Change to the Portal Login and Contact Active or Inactive. Then click Generate Random Password.

   After all of the contacts have passwords generated go to Quick Campaign Pro (QCP) in JoomConnect, sync the marketing group with the MailChimp list by clicking the sync button under the Sync column for the marketing group.
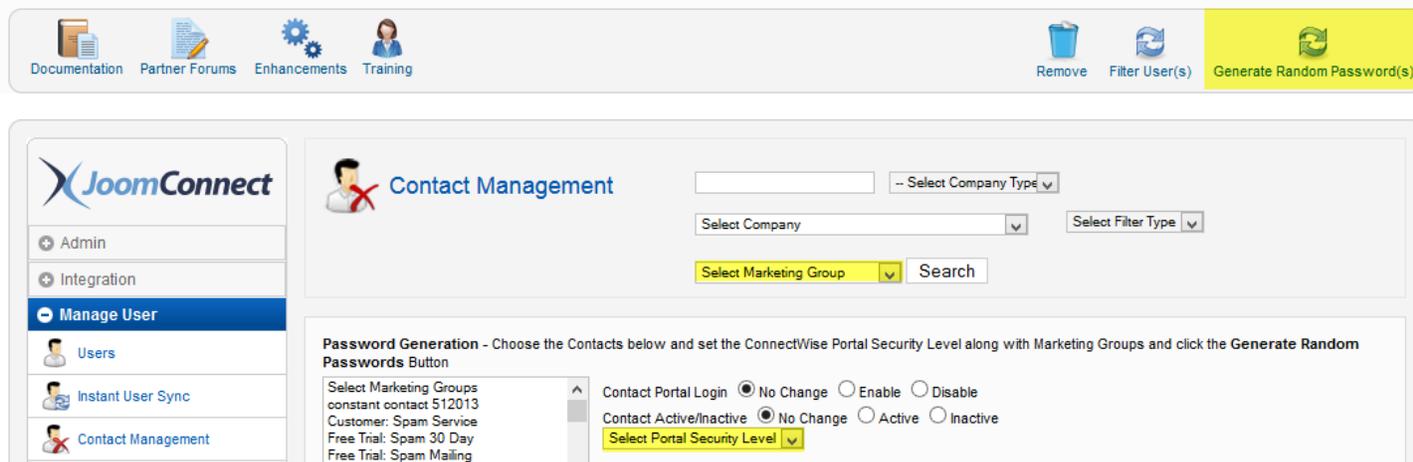

7. After the sync has complete go back to Groups and Tracks; Marketing Groups and **unpublish the marketing group**.
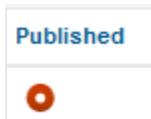
8. Next step in JoomConnect will be to **sync the marketing group contacts with your list in MailChimp or Constant Contact**. Go to Quick Campaign Pro (QCP), under Quick Campaign Pro List, select the mailing system,


then click the Marketing Group, in the drop down select the list you made in the mailing system, save.
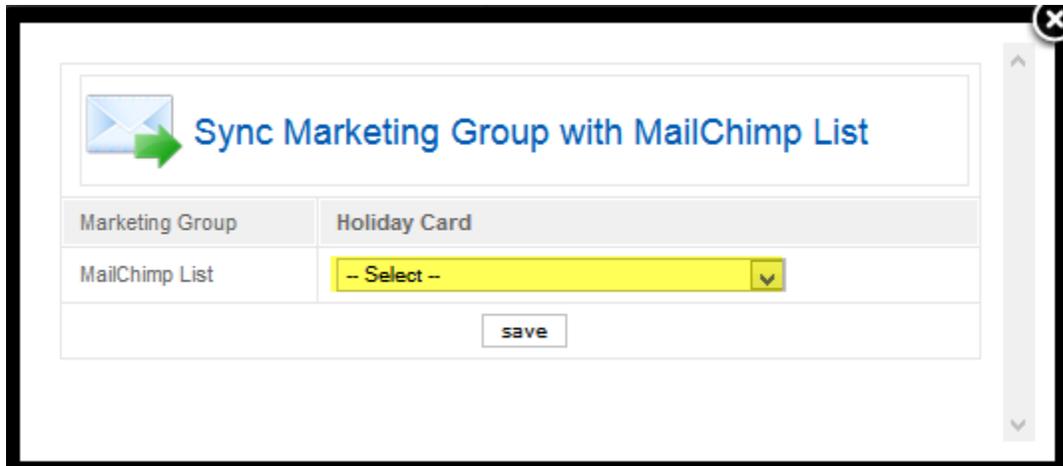
9. When the marketing group has been linked to a mailing list, to push the contacts simply click the Sync button.

10. Finally to **track the clicks and opens** a link will need to be made from the Marketing Campaign to the Campaign in the mailing system. In Quick Campaign Pro (QCP), click Campaign List button
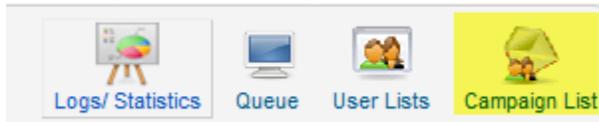
Click the ConnectWise Campaign, in the lytebox, click Add More, then from the drop down, select the campaign from the mailing system. Set an expiration date (date to set the campaign inactive), then click save.

When this is successful, it will be flagged active and have a numeric code confirming a successful link.

| Test | Untitled (445c899547) | ACTIVE | Select Automation Template |

You are now ready to complete and schedule your campaign in MailChimp or Constant Contact!

If you experience any issues during any portion of this documentation please let us know by emailing support@joomconnect.com or by calling 607 433 2200 or via live chat on http://www.joomconnect.com by clicking the Live Chat Support button.