

Constant contact - Integration checklist

Connector launch

- REQUIRED Scenarios to test
- REQUIRED Comments from the integration
- REQUIRED Comments from the testing

Data sharing

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 - How to test your integration
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 - REQUIRED Comments from the integration
 - Comments from the testing
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 - Comments from the testing

Connector launch

REQUIRED Scenarios to test

REQUIRED Comments from the integration

REQUIRED Comments from the testing

When I launch a new connector on my dashboard, I am redirected to the connector page

OK

OK

When I enter the correct credentials in the connector to connect to QBD, I am redirected to QBD to finish the integration and then redirected to the connector page

OK

OK

When I enter incorrect credentials in the connector to connect to QBD, a message is displayed on the connector page telling me my credentials are incorrect

OK

OK

When I launch a connector already linked to my QBD account on my dashboard, I am redirected to the app directly, not to the connector page

OK

OK

Data sharing

API Limitations

- Creation of contact in Constant contact requires a valid email

Pay attention to your existing users

An integration with existing data is ALWAYS tricky. If you want to onboard your customers with existing data in Constant

How to test your integration

To test the data sharing between apps, create an organization on Maestrano, with:

- an Impact!™ Dashboard
- an accounting app: Xero or Quickbooks

contact and another app, a management of duplicates must be anticipated. Please, contact us before doing so.

Pay attention to your users deleting their Maestrano account

Stop sharing data with Connecl! for deleted organizations

- a HR app: Orange HRM
- a CRM app: vTiger

To test the data mapping between Constant contact and Connecl!, install Postman to query Connecl! API (or use a command line on a consol) with a HTTP Basic authentication using your own API credentials

REQUIRED Scenarios to test

REQUIRED Comments from the integration

Comments from the testing

Check the box if the test is OK + add comments

Check the box if the test is OK + add comments

Creation of a customer in any of your application will create a contact in Constant contact under the 'Customer' list

OK

OK

Creation of a supplier in any of your application will create a contact in Constant contact under the 'Supplier' list

OK

OK

Creation of a lead in any of your application will create a contact in Constant contact under the 'Lead' list

OK

OK

Creation of a contact in Constant contact will create a customer in your other applications

OK

OK

Precisions regarding data mapping

In this section are listed advices to map non-trivial mapping

Sales Data

Comments from the testing

Check the box if the test is OK + add comments

OK

Company		Account
Field name on Connecl! API	Field name on Constant Contact API	Comments
name	/account/info/organization_name	
timezone	/account/info/time_zone	
email/address	/account/info/email	
address	/account/info/organization_addresses	
website/url	/account/info/website	
logo	/account/info/company_logo	

People	Contact
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OK

Field name on Conne! API	Field name on Constant Contact API	Comments
first_name	contacts/{contactId}/first_name	
last_name	contacts/{contactId}/last_name	
job_title	contacts/{contactId}/job_title	
email/address	contacts/{contactId}/email_addresses	Only people with emails can be shared to CC
address_work	contacts/{contactId}/addresses	
phone_home	contacts/{contactId}/home_phone	

Employee	Contact
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OK

Field name on Conne! API	Field name on Constant Contact API	Comments
first_name	contacts/{contactId}/first_name	
last_name	contacts/{contactId}/last_name	
job_title	contacts/{contactId}/job_title	
email/address	contacts/{contactId}/email_addresses	Only people with emails can be shared to CC
address_work	contacts/{contactId}/addresses	
phone_home	contacts/{contactId}/home_phone	

Event	Event
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NOT MAPPED YET