

Constant Contact for QuickBooks Online

- About Constant Contact for QuickBooks Online
- Installing Constant Contact for QuickBooks Online
- Uninstalling Constant Contact for QuickBooks Online
- Troubleshooting
- Frequently Asked Questions



Constant Contact for QuickBooks Online

About Constant Contact for QuickBooks Online

Use **Constant Contact for QuickBooks Online** to automatically synchronize your customer or donor information between your QuickBooks Online account to your Constant Contact account. As customers are added, or their information updated in QuickBooks Online, the Constant Contact list will also update - automatically. If you need a Constant Contact account, you'll be able to sign up for one when you download the app!

If you have QuickBooks Online Simple Start or higher, you can use this app to keep your records synched. The first sync can take between 15 minutes to several hours, depending on how many customers you have. After that, the Constant Contact list is updated whenever you make changes in QuickBooks Online.

<i>What will sync?</i>	All of your customer's contact information will be synched to the Constant Contact list.
<i>When will it sync?</i>	Whenever you add a new contact record to QuickBooks Online, or make edits to an existing record, the Constant Contact list will reflect these updates.
<i>How many can I sync?</i>	The maximum limit is 10,000 customers to sync.

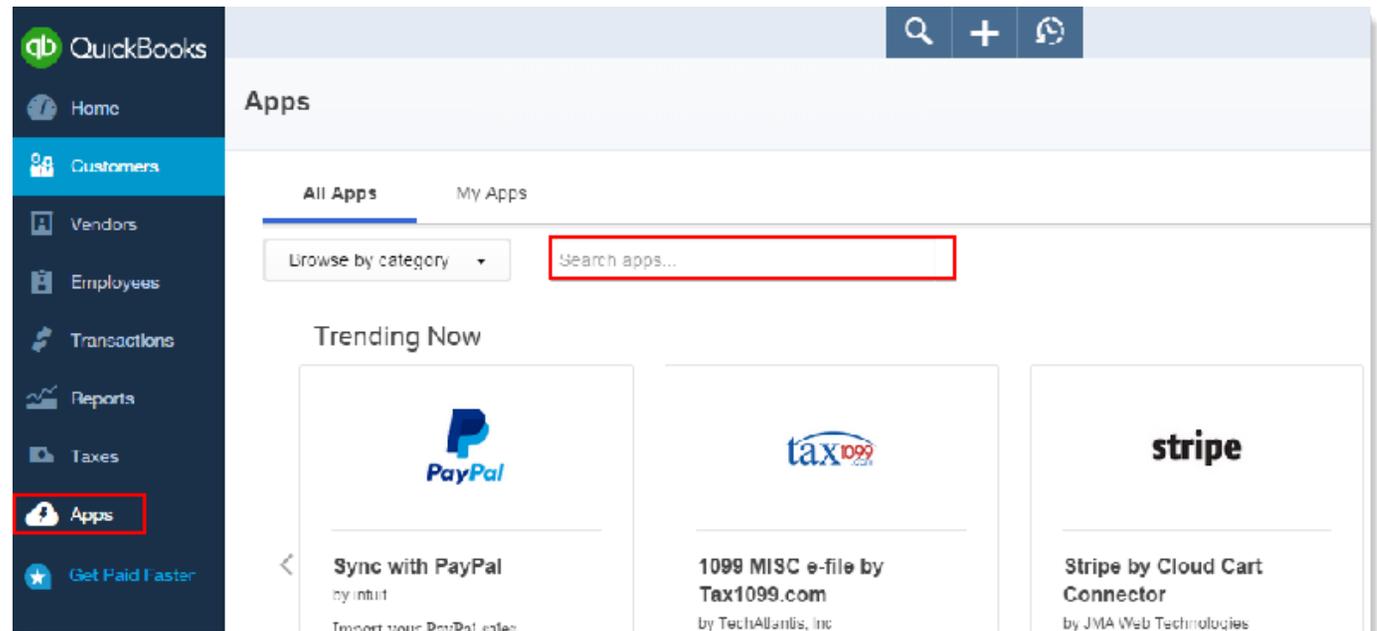
Installing Constant Contact for QuickBooks Online

Log in to your QuickBooks Online account.

Click on **Apps** tab, then type in *Constant Contact for QuickBooks Online* in the Search apps field.

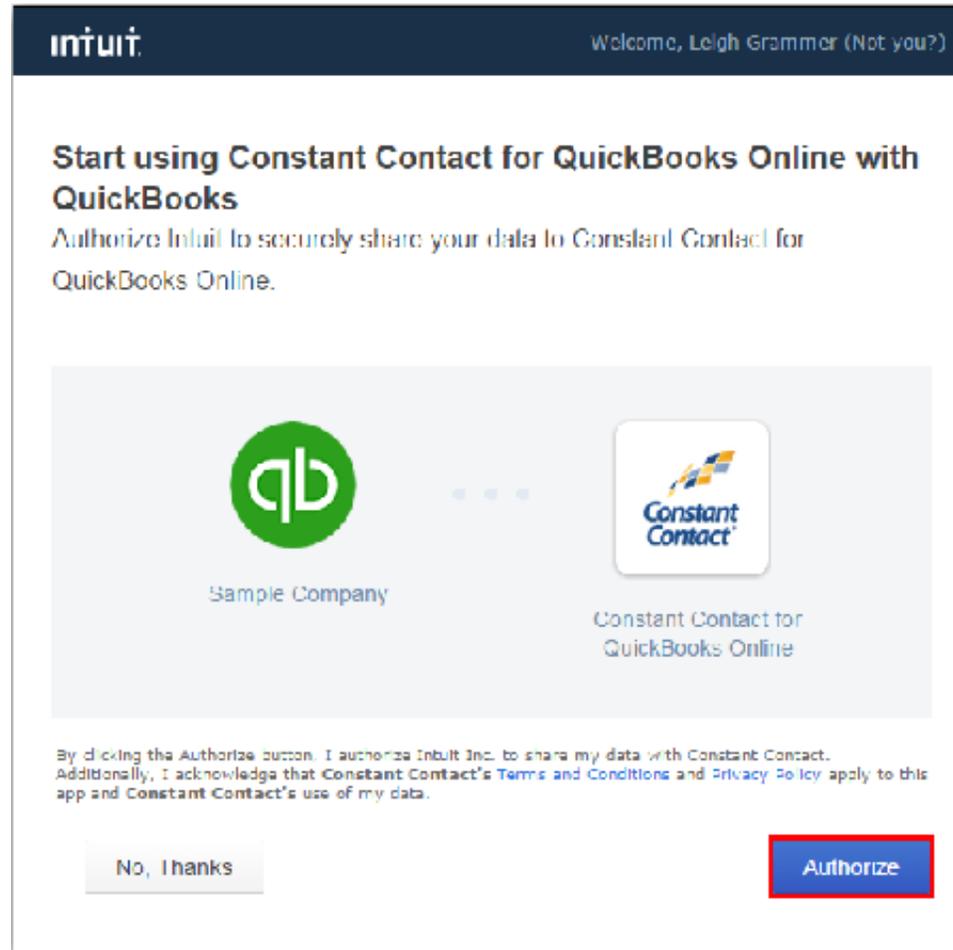
Click on the Constant Contact app when it's found.

Click on the **Get App Now** button



Installing Constant Contact for QuickBooks Online

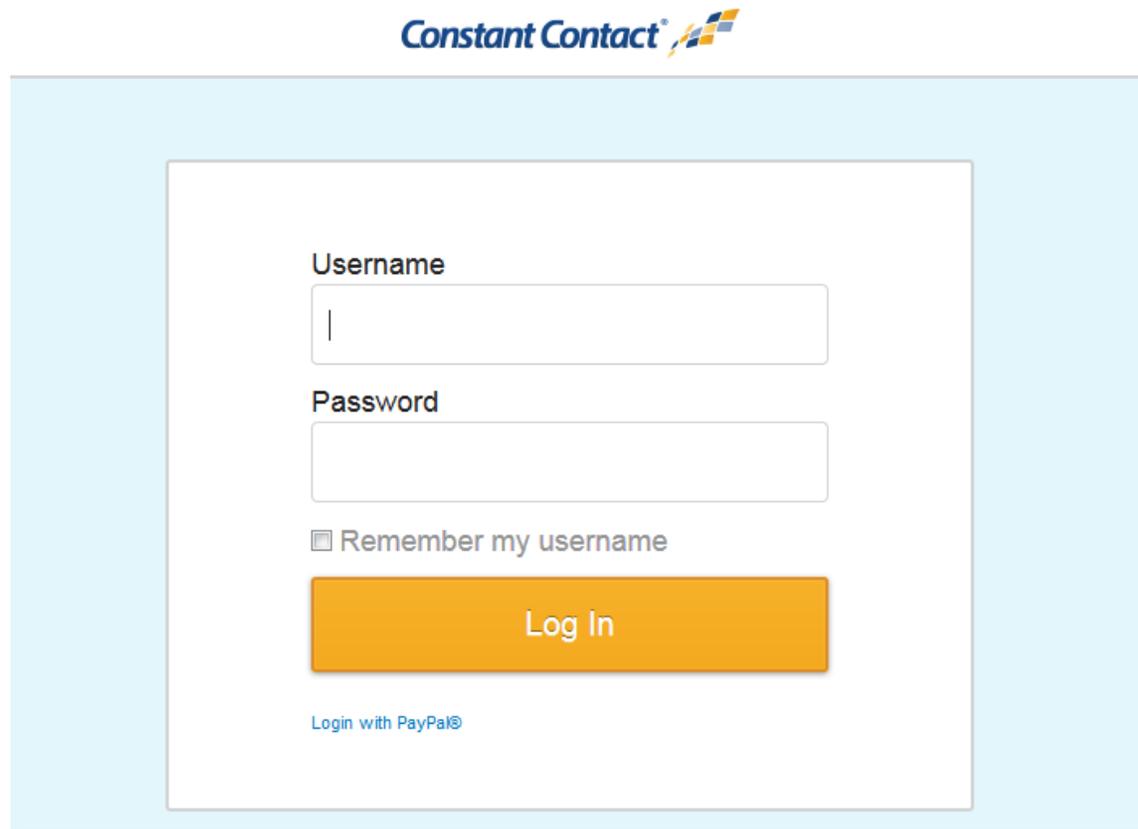
Click on the **Authorize** button.



The screenshot shows the Intuit user interface for authorizing Constant Contact for QuickBooks Online. At the top left is the Intuit logo, and at the top right is the user name "Welcome, Leigh Grammer (Not you?)". The main heading is "Start using Constant Contact for QuickBooks Online with QuickBooks". Below this is the text "Authorize Intuit to securely share your data to Constant Contact for QuickBooks Online." The central part of the screen features two app icons: "Sample Company" (a green circle with "qb") and "Constant Contact for QuickBooks Online" (a white square with a blue and yellow logo). Below the icons is a paragraph of text: "By clicking the Authorize button, I authorize Intuit Inc. to share my data with Constant Contact. Additionally, I acknowledge that Constant Contact's Terms and Conditions and Privacy Policy apply to this app and Constant Contact's use of my data." At the bottom, there are two buttons: "No, thanks" and "Authorize". The "Authorize" button is highlighted with a red border.

Installing Constant Contact for QuickBooks Online

As part of the authorization process, now you'll need to log into your Constant Contact account.



The image shows a screenshot of the Constant Contact login interface. At the top, the Constant Contact logo is displayed. Below it, there is a light blue rectangular area containing a white login form. The form has the following elements: a 'Username' label above a text input field; a 'Password' label above a text input field; a checkbox labeled 'Remember my username'; a large orange 'Log In' button; and a link for 'Login with PayPal®' at the bottom left of the form area.

Installing Constant Contact for QuickBooks Online

Click on the **Allow** button to connect your accounts.

Allow Access?

Constant Contact for Quickbooks Online would like to access and/or update your Constant Contact account.

Allow

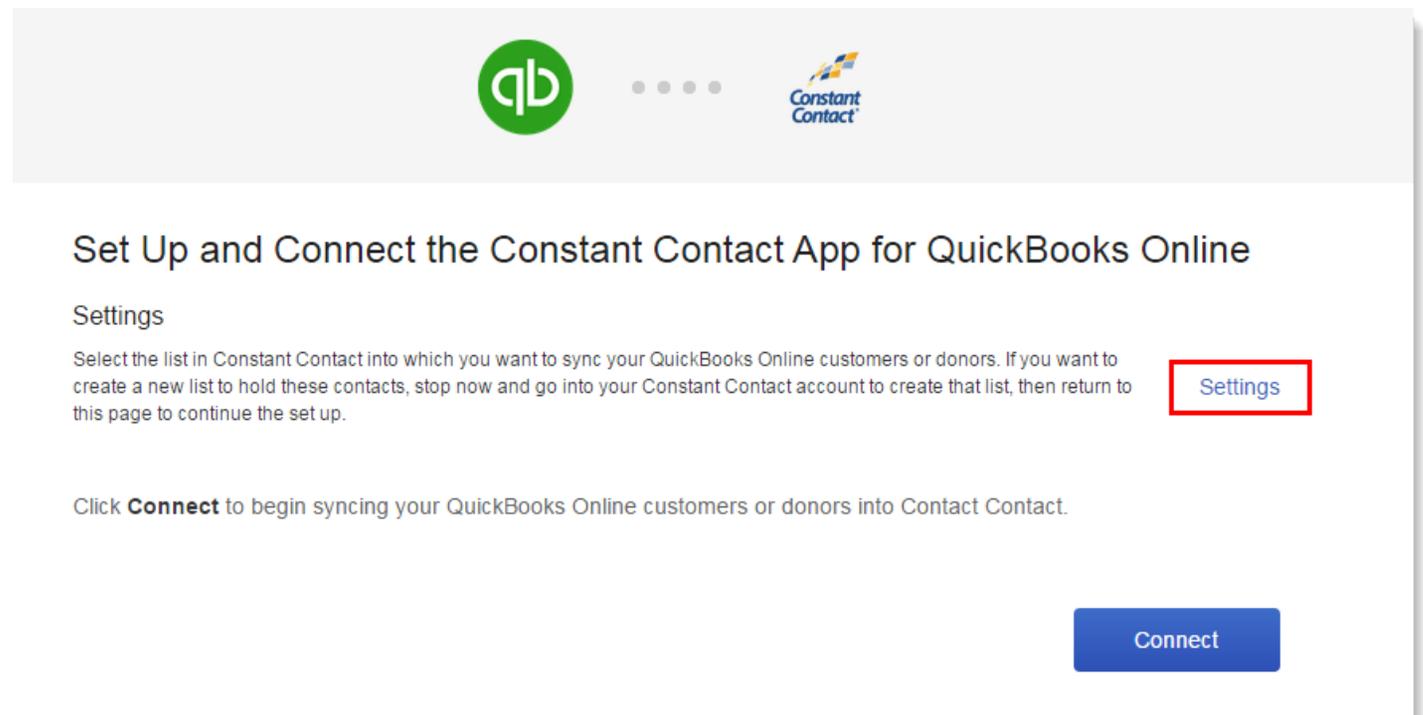
Deny

You should only grant access to applications you trust with your Constant Contact account information.

Installing Constant Contact for QuickBooks Online

Now you need to tell QuickBooks Online where your customer list will sync to in Constant Contact.

Click on the "Settings" link.



The screenshot shows the top navigation bar with the QuickBooks Online logo (qb) and the Constant Contact logo. Below the navigation bar, the main heading reads "Set Up and Connect the Constant Contact App for QuickBooks Online". Underneath, the "Settings" section is highlighted with a red box. The text in the "Settings" section instructs the user to select a list in Constant Contact for syncing QuickBooks Online customers or donors. A "Settings" link is provided in a red-bordered box. Below this, there is a "Connect" button.

qb ... Constant Contact

Set Up and Connect the Constant Contact App for QuickBooks Online

Settings

Select the list in Constant Contact into which you want to sync your QuickBooks Online customers or donors. If you want to create a new list to hold these contacts, stop now and go into your Constant Contact account to create that list, then return to this page to continue the set up.

[Settings](#)

Click **Connect** to begin syncing your QuickBooks Online customers or donors into Contact Contact.

[Connect](#)

Installing Constant Contact for QuickBooks Online

Use the dropdown arrow to see all of your Constant Contacts lists. Use the dropdown menu to choose the list you want your QuickBooks Online customer list to sync to.

Then click **Save Settings**.

intuit QuickBooks. Apps My Apps App Resources Need Help? Search apps...

qb Constant Contact

Settings

Select the list in Constant Contact into which you want new and updated customers or donors to be synced. *

2015 Doner List ▼ ?

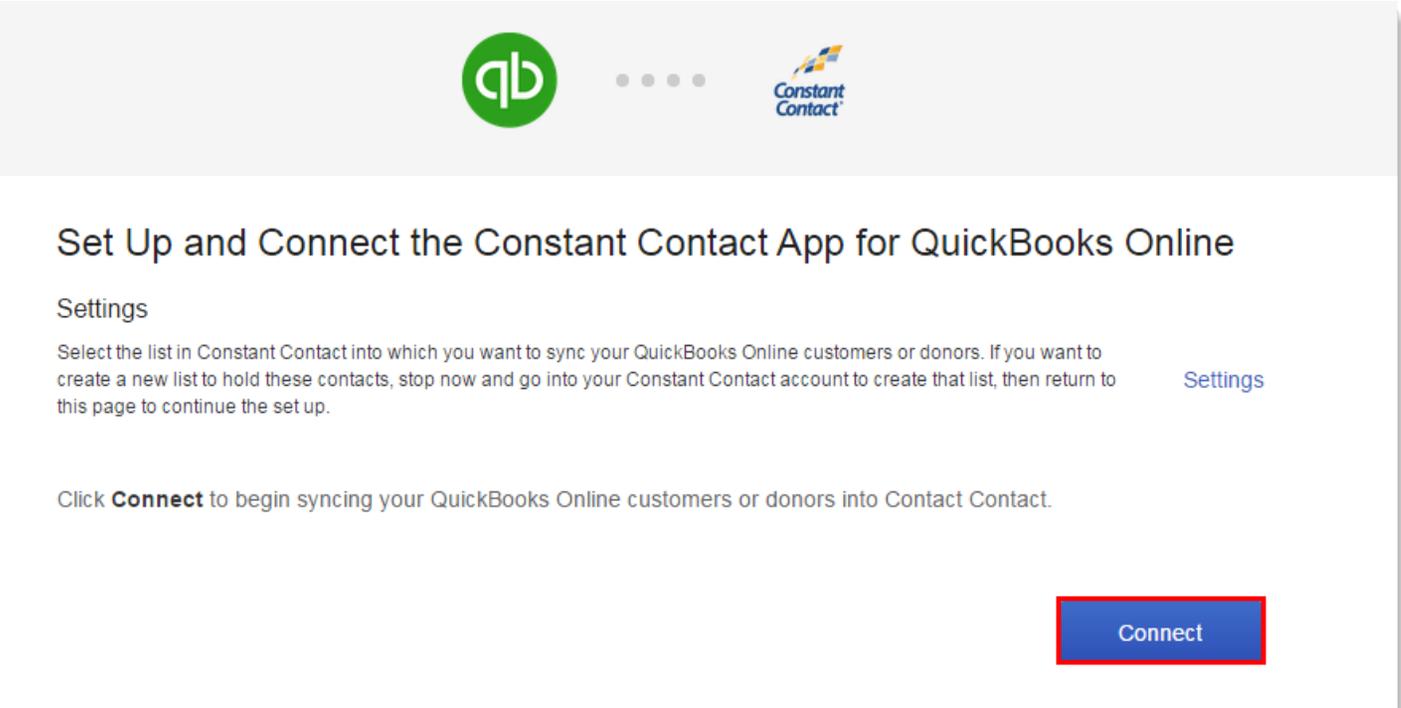
Sync all of my active existing QuickBooks Online customers or donors ?

Cancel Save Settings

If you need to create a list for your customers, click **Cancel** to go back 1 step. Go to your Constant Contact account in another browser and create your list. Then come back to QuickBooks Online and continue where you left off. You should now see your new list in the dropdown menu.

Installing Constant Contact for QuickBooks Online

Click the **Connect** button to finish setting up your app.



qb ... Constant Contact

Set Up and Connect the Constant Contact App for QuickBooks Online

Settings

Select the list in Constant Contact into which you want to sync your QuickBooks Online customers or donors. If you want to create a new list to hold these contacts, stop now and go into your Constant Contact account to create that list, then return to this page to continue the set up. [Settings](#)

Click **Connect** to begin syncing your QuickBooks Online customers or donors into Contact Contact.

[Connect](#)

Installing Constant Contact for QuickBooks Online

You'll see this success message when you have successfully installed your app and connected your Constant Contact account.

You're done!



Congratulations!

Constant Contact for QuickBooks Online is successfully installed and configured.

All new customers or donors and updates to existing customers or donors will automatically be synced to Constant Contact. Please note that depending on the number of customers or donors that you have in QuickBooks Online it can take from 15 minutes to several hours for the initial sync to complete. You will see contacts appear progressively in your Constant Contact list as the sync progresses.

In the future, if you wish to change the settings, you can go back to [My Apps](#).

Installing Constant Contact for QuickBooks Online

You'll see your Constant Contact for QuickBooks Online app in the **My Apps** tab.

The screenshot displays the QuickBooks Online interface. On the left is a dark blue navigation sidebar with the following items: QuickBooks (logo), Home, Customers, Vendors, Employees, Transactions, Reports, Taxes, Apps (highlighted with a red box), and Get Paid Faster. The main content area is titled 'Apps' and has two tabs: 'All Apps' and 'My Apps' (highlighted with a red box). Below the 'My Apps' tab, two app cards are visible. The first card is for 'Constant Contact', showing its logo and a list of actions: Launch, Settings, Support, and Disconnect. The second card is for 'Online Payroll', showing its logo and a list of actions: Launch, Support, Update Subscription, and Cancel Subscription.

Uninstalling Constant Contact for QuickBooks Online

If you need to un-install your app, the process is very simple.

- Click on the Apps tab, then My Apps to find the application.
- Click the "Disconnect" link.
- Follow the screen prompts until you have completed disconnecting the accounts.

The process is illustrated through four sequential screenshots:

- Step 1:** The user is in the QuickBooks Online 'Apps' section, specifically 'My Apps'. The 'Constant Contact' app is listed with a 'Disconnect' link highlighted in red.
- Step 2:** A confirmation dialog box appears with the message: "Are you sure you want to disconnect your data from Constant Contact?". It lists what happens after the disconnect: "The app will no longer have access to the QuickBooks data" and "The app will no longer appear in Blue Dot menu or My Apps page". The 'Yes' button is highlighted in red.
- Step 3:** A success message is displayed: "You have successfully disconnected from Constant Contact." with a red exclamation mark icon. Below the message, it says "Click 'Next' to go to Constant Contact to confirm this action." The 'Next' button is highlighted in red.
- Step 4:** The user is redirected to the 'Constant Contact for QuickBooks Online' page. A yellow banner at the bottom of the page states: "You are no longer subscribed to this app."

Constant Contact for QuickBooks Online

If you have any questions regarding the app, or how to use Constant Contact, [please contact us](#) through our Support page.

Troubleshooting

<i>My number of customers in QuickBooks Online and the list in Constant Contact aren't the same - what happened?</i>	If a customer in your QuickBooks Online account doesn't have an email address, they will not be synched to the Constant Contact list. Also if they have "unsubscribed". If your customer is in an Unsubscribed state in Constant Contact, their information will not be synched.
<i>What happens if I change the list I sync to after I've synched to a list in Constant Contact?</i>	If you add another list to synch to in Constant Contact, new contacts will be added to the "new" list only, and updated information will go to both lists, since the customer exists in both lists.

Constant Contact for QuickBooks Online

If you have any questions regarding the app, or how to use Constant Contact, [please contact us](#) through our [Support page](#).

Frequently Asked Questions

<i>I updated some info in my customer's record, will Constant Contact know?</i>	After a customer has been synched to Constant Contact, edits and updates you make in QuickBooks Online will be sent to Constant Contact automatically.
<i>What happens to customers who have been deactivated in QuickBooks Online?</i>	If you have deactivated a customer prior to synching to Constant Contact, they will not be brought to the list.
<i>My number of customers in QuickBooks Online and the list in Constant Contact aren't the same - what happened?</i>	If a customer in your QuickBooks Online account doesn't have an email address, they will not be synched to the Constant Contact list. Also if they have "unsubscribed".
<i>What if I deactivate a customer after I've synched with Constant Contact.</i>	Deleting or deactivating a customer in QuickBooks Online will not remove them from the Constant Contact list.
<i>What happens if I change the list I sync to after I've synched to a list in Constant Contact?</i>	If you add another list to synch to in Constant Contact, new contacts will be added to the "new" list only, and updated information will go to both lists, since the customer exists in both lists.