Optima Management software allows a user to send basic HTML text emails or to link to more advance email programs like Constant Contact.

Topics:
To create a Constant Contact account
To connect your Constant Contact account to OMS (Optima Management Software)
To export email lists from OMS to Constant Contact

**To set up your account with Constant Contact:**

- If you are not currently a member with Constant Contact, begin at step 1.
- If you are already a member of Constant Contact, begin at step 7.
    - Step 1: Log in as administrator into OMS (Optima Management Software) Customers
    - Step 2: Click "email" on the left side of the screen
    - Step 3: Select the "Constant Contact" tab in center of page
    - Step 4: Click the "Constant Contact Free Trial" button at the bottom of the page. A 60 day free trial is available from Constant Contact.

- The page will refresh and redirect you to a Constant Contact page.

    - Step 5: When ready, select the "Get Email Marketing" button.
    - Step 6: Depending on what screen appears next, follow step below.

        - If the page says "Welcome Back" then select the "sign up for free" link, then proceed to fill in the required information and click the "Get Started" button at the bottom. Follow their steps in proceeding. When complete, return to OMS.
        - If the Page says "Try email marketing" then fill in the required information and click the "Get Started" button at the bottom. Follow their steps in proceeding. When complete, return to OMS.

If you already have an account with Constant Contact

    - Step 7: Once you have an account with Constant Contact, return to the Constant Contact page within OMS and select the "Connect Now" button and enter your Constant Contact username and password then click log in. Follow the steps to connecting and you are done.
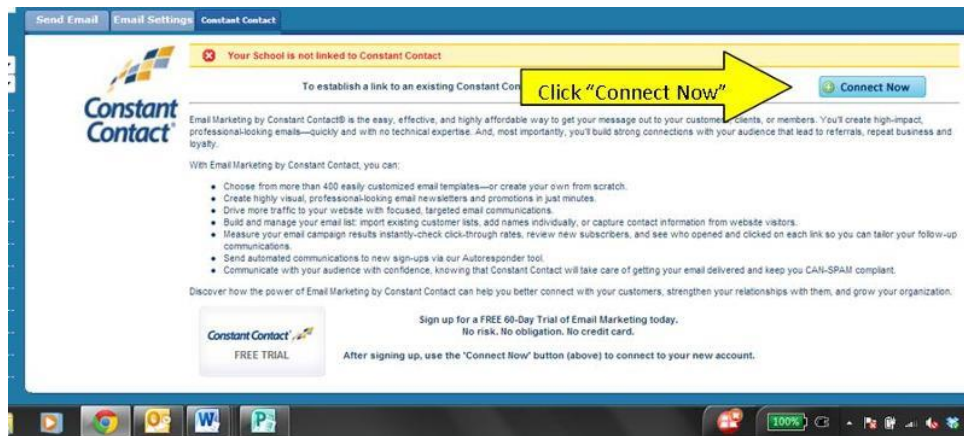
Your software should now be connected to Constant Contact and you should see a confirmation that your school is linked to OMS.

When uploading an email list from OMS (Optima Management Software) to Constant Contact:
Currently you can only upload list from 1 area of OMS. We will be adding the feature to many other reports as well.

*NOTES:
    Only contacts with valid email addresses will go into list.
    Duplicate email addresses will only be entered one time under the first submitted name.
        Ex. Family members with same email address will only be listed under one name.
    If a student has "unsubscribed" from your mailing previously, they will be imported however they
    will be listed as "Unsubscribed" and you will not be able to email them until they "subscribe" again.

To Export a list to Constant Contact:

- Click "Reports" on the left of the screen.
- Next click "Mailing list".
- Select your desired criteria for your mailing list.
- Click "Submit".
- Once the page displays a page with a label layout for addresses, at the top of the page you should see a Constant Contact export line.

Mailing List

CHANGE CRITERIA

[Printable View] [Export]

EXPORT TO CONSTANT CONTACT

NEW LIST NAME: [   ] [Add]   LIST TO USE: [General Interest ▼] [Export to Constant Contact]   **Constant Contact Export line**

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If creating a new list:
- Enter "New List Name" in the "New List Name" box. This should be the name that you would like to appear in Constant Contact.
- Click "Add"
- After screen refreshes, the new list is added to drop down menu called "List to Use".
- Select the list if not already entered.
- Click "Export to Constant Contact".
- Your new list will now be sent to Constant Contact. It will usually take 3-4 minutes to finalize in Constant Contact. Larger list may take a little longer.

To use a current list:
- Select the list from the drop down menu called "List to Use".
- Then select "Export to Constant Contact".

When using a current list, any new contact will be added however it will not remove any contact that may not be in your new list but was in a previous version of it. For ex: if you create an active member list for 1-1-13 and upload it, then on 2-1-13 add to that list of active members (to include new enrollments), any student who was changed from active to former customer within OMS between those dates would still appear in the active Constant Contact list. To clean out a list, it is recommended to upload a new list with a different name then delete the old list from Constant Contact.

You can also view all your lists and any recent Constant Contact activity in OMS. Go to "Email" on the left side of the screen, then select the "Constant Contact" tab