ActiveCampaign Email Integration Guide

OVERVIEW

Humanitru Alpine offers deep integrations with best-in-class email marketing platforms to assist you in all of your email engagement needs. This guide is meant to provide an overview of what goes on behind the scenes, taken directly from the code to ensure that nothing goes missing and undocumented.

To the best of our ability, we will ensure that all email marketing integrations behave similarly. However, as this is a guide specifically for ActiveCampaign, we will use language that is appropriate to that platform.

Vocabulary

This guide assumes an intermediate level of understanding of the ActiveCampaign platform and its vocabulary. To provide in brief, within ActiveCampaign, your **Contacts** belong to **Lists**, with the potential for your account to **have multiple Lists**.

Within a **List**, you can have **Tags** which you can use to segment contacts. Contacts may have multiple **Tags**, and **Tags** can have multiple **Contacts**.

Each **Contract** can have **Fields** (merge fields) that can be used when personalizing content, e.g. first name, last name, etc. ActiveCampaign's preferred syntax for denoting these **Merge Fields** is with a percentage symbol prefixing and suffixing the field name, e.g. %FIRST_NAME%, this syntax is unique to ActiveCampaign.

Then, each **Field** belongs to a **Group**, standard fields belong to *"General Details"*. To ensure Alpine does not override any of your contact's data a new *"Alpine"* group will be created to sync Alpine's data.

Finally, within ActiveCampaign a contact may have several **subscription statuses:** any, unconfirmed, active, unsubscribe, bounced. Please refer to the [ActiveCampaign documentation](#) for specific definitions of what these contact subscription statuses mean.

SETUP & SETTINGS

Integration Settings

LOCATED UNDER THE "INTEGRATIONS" SECTION UNDER "SETTINGS" ON THE LEFT
Here the only requirement is to include the ActiveCampaign's API Key.

Your API key can be found in your ActiveCampaign account on the Settings page under the "Developer" tab.

Synced Merge Fields (Fields)

IN ALPINE "SETTINGS" UNDER "ALL FIELDS"
Alpine can manage its synced fields with ActiveCampaign, allowing you to use personalized content and information from your **Alpine Constituent Report** in your ActiveCampaign email campaigns. Be sure that you've added these columns to your **Alpine Constituent Report** so that you can use their data in your ActiveCampaign email.

IN ALPINE "SETTINGS" UNDER "ALL FIELDS", click on "SYNC TO EMAIL MARKETING MERGE FIELD" to pull in that information into your personalized email. In ActiveCampaign.

From your **Alpine Constituent Report** you can push the following column information to use as "Merge Fields" in your ActiveCampaign email.

[Alpine] Last Donation Amount
[Alpine] Last Donation At
[Alpine] Transaction Total Tax
[Alpine] Donation Total Tax Deductible

While creating your email, you'll find in ActiveCampaign's "Merge Tags" under the "Personalization" button several precalculated merge fields available that do not appear in your Alpine Constituent Reporting Interface.

The merge fields available in ActiveCampaign but not in Alpine are the following:

[Alpine] Last Donation Amount Tax Deductible
[Alpine] Linked Donation Tax Deductible

NIGHTLY SYNC

OCCURS EVERY NIGHT RANDOMLY BETWEEN 1:00AM ET AND 4:59AM ET TO EVEN OUT LOAD.
Every night, all of your integrations will run, including your ActiveCampaign email marketing integration. The following is a step-by-step process of what occurs every night when your integration is run, in order, taken directly from the code.

Pulling Contacts from ActiveCampaign into Alpine

CONTACTS ONLY (EMAIL ADDRESSES + ADDITIONAL INFO)
First, all currently applied subscription status Alpine Tags (under the Tag Group: "[ActiveCampaign] Subscription Status") will be deleted (except for "Do Not Sync" and "Deleted (Do Not Sync)", as they will be immediately subsequently refreshed directly from their source, as described in the following paragraph). Then, Alpine will fetch a list of contacts from the ActiveCampaign audience configured above under Setup "ActiveCampaign Audience (Pull)", along with additional information depending on the platform.

Additional Fields	
ActiveCampaign	*Corresponding Alpine Field*
Email Address (%EMAIL%)	[Base] Email
First Name (%FIRSTNAME%)	[Base] Email Salutation
Last Name (%LASTNAME%)	"%FIRSTNAME% %LASTNAME%" will be [Base] Name (to combat spam, this will be truncated to 255 characters)
Address Line 1 (%ADDRESS1%)	All address fields combined into [Base] Address (and then geocoded into [Derived] Address Fields)
Address Line 2 (%ADDRESS2%)	
City (%CITY%)	
State Abbreviation (%STATE%)	
ZIP Code (%ZIP%)	

Subscription Status	A Tag Group named: [ActiveCampaign] Subscription Status

Alpine will then attempt to either match these contacts to pre-existing constituents or create new ones if not present or found. This matching algorithm is standardized across our entire platform: return the first result from the following lists, ordered by priority:

1. Any constituent with the [Base] Email field equal to the correct value
2. Any constituent with Custom Fields of type Email (e.g. Secondary Email, Tertiary Email, etc.)
3. Any constituent with the [Base] Name field equal to "FIRST_NAME LAST_NAME".

If there are multiple matches within the same type of match (e.g. multiple constituents with the same [Base] Email field matching the email address given, then it will choose the **first constituent created (lower ID).** However, do not rely on this as this is not guaranteed [e.g. merging constituents will generate a new constituent with a higher ID than any of its merged constituents]).

*To ensure first and last names are pulled into Alpine, be sure to turn off first and last name as "required" fields in ActiveCampaign.

Pushing Contacts from Alpine into ActiveCampaign
CONTACTS ONLY (EMAIL ADDRESSES + ADDITIONAL INFO)
For ActiveCampaign, Alpine will begin pushing its entire constituent list to your ActiveCampaign List, according to the following process:

1. Take every single Constituent within your Alpine database.
2. Out of those Constituents, remove any that are tagged with the following tags:
   a. [ActiveCampaign] Subscription Status: Do Not Sync
   b. [ActiveCampaign] Subscription Status: Deleted (Do Not Sync)
3. Fetch all ActiveCampaign "Merge Fields", looking for those maintained by Alpine (within ActiveCampaign, these will be merge fields that are under the Group "Alpine").
   a. If these fields do not yet exist, then create them.
   b. Alpine will never **push** information into your pre-existing non-Alpine ActiveCampaign Merge Fields, e.g. "%FIRSTNAME%" or %LASTNAME%". This is to preserve any data you have within these platforms. However, when **pulling** information from ActiveCampaign, Alpine will access these fields

c. The list of fields synced by Alpine into ActiveCampaign can be customized and is covered above under Setup
- i. These can include both Base Fields and Custom Fields
  - 1. Currently, Alpine does not support syncing Derived fields into ActiveCampaign
d. You may use these Alpine fields in your Merge Field sections in your campaign templates, e.g. *|ALPINE_B0|* for Alpine [Base] Name, etc
e. If you accidentally delete these Merge Fields within ActiveCampaign, they will be restored during the nightly sync from Alpine
f. If you replace or set any values for these Alpine-managed Merge Fields within ActiveCampaign, they will be overridden/replaced on a nightly basis
g. Two additional calculated fields will always be synced into ActiveCampaign on a nightly basis:
- i. Last Donation Amount (in full $0,000.00 format, including cents even if zero).
- ii. Last Donation Date (in MM/DD/YY format, omitting leading zeros where appropriate, e.g. 5/2/19 instead of 05/02/19).

4. Push remaining constituents from Step 2 with data from ActiveCampaign Merge Fields identified in Step 3 into ActiveCampaign.
   a. Each constituent will be associated with an email address. Email addresses will be pulled from the [Base] Email field, as well as any custom Fields that are of type Email. If multiple constituents share the same email address (either via custom Fields, Base Fields, or a mix of the two), then the following priority will be used as which Constituent's information will be used for that email address:
   - i. Custom Fields
   - ii. Base Fields
   - iii. N.B. *Do not rely on this pattern, we highly encourage you to maintain unique email addresses per constituent within Alpine to minimize the chances of email address collision*
   b. ActiveCampaign will automatically perform matching based on email for all passed-in email addresses from Alpine. If Alpine passes in an email address from a constituent that does not have a corresponding contact within ActiveCampaign, a new contact within ActiveCampaign will be created with Subscription Status: Subscribed.
   c. Alpine will never override the pre-existing subscription status within ActiveCampaign if the matched ActiveCampaign Contact already exists. For example, if someone is unsubscribed within ActiveCampaign, Alpine will never reset that status

i. However, if you delete contacts out of ActiveCampaign, Alpine will re-sync them into ActiveCampaign. To prevent this from happening, either leave them within ActiveCampaign marked as unsubscribed (instead of deleting), as that will leave them in the system but Alpine will not override (as they already exist within ActiveCampaign)

After Alpine has synced its entire constituency base into ActiveCampaign, it will look at any Alpine Tags that have been set to sync on a nightly basis, and repeat the process described above, with the following differences. To configure an Alpine Tag to sync automatically on a nightly basis, please refer to the Setup section above.

- Instead of Step 1 ("Take every single Constituent within your Alpine database."), it will only take Constituents that are tagged with the Tag in question
- After Step 4 ("Push Constituents into ActiveCampaign"), it will perform the additional step of creating an ActiveCampaign Tag (or finding one if it already exists) and associate the constituents with that particular ActiveCampaign Tag
  - First, Alpine will fetch a list of all ActiveCampaign Tags from ActiveCampaign, selecting those begin with "[Alpine: "
    - For example, an ActiveCampaign Tag titled "[Alpine: Created 1/20/20 1:45 PM ET] Test Tag 1"
  - Within those matched ActiveCampaign Tags, look for one whose name matches the corresponding Alpine Tag
    - For example, if the Alpine Tag name is "Test Tag 1", then it will match the ActiveCampaign Tag "[Alpine: Created 1/20/20 1:45 PM ET] Test Tag 1", or one named "[Alpine: Updated 1/24/20 2:39 PM ET]".
  - If no ActiveCampaign Tag exists that matches the Alpine Tag name, then a new ActiveCampaign Tag will be created with its name adhering to the following format:
    - [Alpine: Created M/D/YY HH:MM AM TZ] TAG_NAME
  - Now that an ActiveCampaign Tag exists (either created on the spot or previously found), then the constituents under the Alpine Tag will be associated with that ActiveCampaign Tag
    - N.B. Similar to Step 4a above, all emails linked to the constituent ([Base] Email, as well as any Custom Fields of type Email) will be associated with this ActiveCampaign Tag. This is regardless of if those columns are selected in the Alpine Constituent reporting interface.

Syncing Email Subscriber Activity
EMAILS SENT, OPENED, AND LINKS CLICKED

Alpine will fetch a list of all Email Campaigns sent to that Audience in the two weeks preceding the last time the email integration synchronization was run. If no date is present (e.g. the first time the integration runs), then it will pick the date of 12 months ago. As this email integration runs nightly, this will usually correspond to any email campaigns sent within the last two weeks.

For Automated ActiveCampaign Campaigns, Alpine will sync all component email campaigns within the larger Automated Email Campaign. For A/B ActiveCampaign Campaigns (known as Split Testing), Alpine will sync not only the A and B versions but also the final winning email campaign sent to the rest of your List.

For each ActiveCampaign Campaign, Alpine will fetch campaign subscriber activity (email address recipients, email opens, links clicked) since the last time the synchronization was run, or if not present, twelve months ago. Therefore, there are three types of campaign subscriber activity:

Campaign Subscriber Activity Types		
Email Sent	*Email Opened*	*Email Link Clicked*
Email Address	Email Address	Email Address
Email Body (HTML)	Email Body (HTML)	Email Body (HTML)
Email Subject Line	Email Subject Line	Email Subject Line
Timestamp	Timestamp	Timestamp
		URL of Link Clicked

Campaign subscriber activity will be skipped if the given email address from ActiveCampaign matches one of the values under Setup (Ignored Email Addresses (Comma Separated)).

If during this campaign subscriber activity sync, if a new email address is found (e.g. not previously present in the database), then a new Alpine Constituent will be created with the name "Contact for email@address.com". This may occur if you have deleted a contact out of ActiveCampaign, but that contact had received an email communication at some point in the past.

If multiple Constituents match a given Email Address, then all matched constituents will have Actions created under their own profiles. For example, if the email address "hello@example.com " is linked to three Constituents (two with the "[Base] Email" field set to "hello@example.com", and a third with a Custom Field of type Email called "Secondary Email" set to

"hello@example.com"), then three email open Actions will be created (and associated with the three Constituents).

Syncing Email Campaign Content

HTML BODY + SUBJECT LINE + PREVIEW TEXT

For all ActiveCampaign Campaigns tracked with all Alpine Actions related to email subscriber activity (emails sent, emails opened, email links clicked), Alpine will sync the content of the ActiveCampaign email campaign into its own database (accessible via "View Preview"). Alpine will attempt to download the following information per ActiveCampaign email campaign:

- HTML Content (images, CSS, as displayed to end-users)
  - For A/B email campaigns (internally referred to as Variate), the A version will be recorded
- Plain Text Content (not always available, depending on your ActiveCampaign plain-text campaign generation settings)
  - For A/B email campaigns (internally referred to as Variate), the A version will be recorded
- Subject Line
- Preview Text

If you have any questions about the ActiveCampaign/Alpine integration be sure to reach out to your Customer Success Manager/Support Team.