User Guide

Version 3

Confidential

Last updated July 2013

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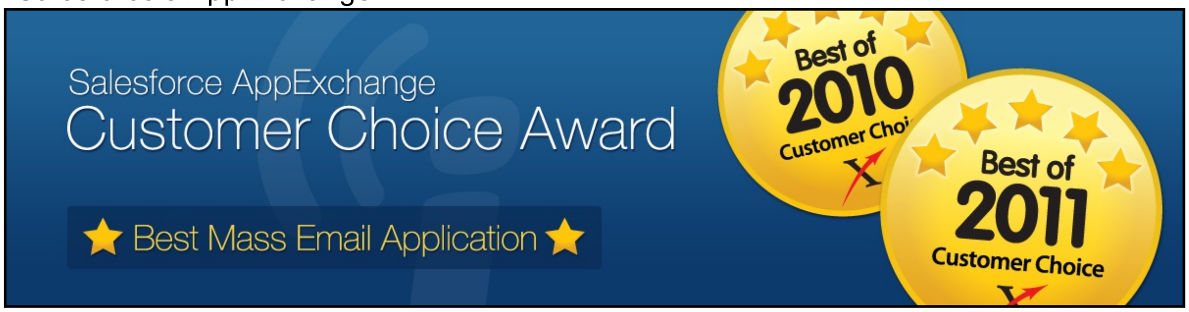
1. Getting Started

1.1 Introduction

This document is a guide to using iContact for Salesforce CRM (hereafter referred to as "iContact"). Email marketing with iContact for Salesforce allows you to create, send and track relevant and targeted email marketing without the need to learn a new application. If you know how to use Salesforce, you know how to use iContact for Salesforce. For more information, please visit us on the AppExchange.

iContact for Salesforce was awarded the 2010 and 2011 Best Mass Email App in Salesforce's AppExchange.



1.2 Requirements

To integrate with iContact, your Salesforce organization must be Professional Edition (PE), Enterprise Edition (EE), or Unlimited Edition (UE) and have the Campaign functionality enabled. iContact can send messages to Contacts and/or Leads. iContact currently does not support full use with Person Accounts. As a user, you will need to be given the proper permissions to utilize iContact for Salesforce.

For setup and configuration details, please see the iContact for Salesforce Installation and Configuration Guide for your Salesforce edition or contact your System Administrator.

1.3 Overview

For a general overview of iContact for Salesforce, we recommend to start by watching our video tutorials. We also have weekly training webinars to give more experience with the product.

1.4 Support

For any technical or setup questions that are not answered in this guide, please contact iContact for Salesforce Support at:

Toll free: 1-866-331-3208
International: +1-919-957-6070
salesforce@icontact.com

2. Configuring your Application

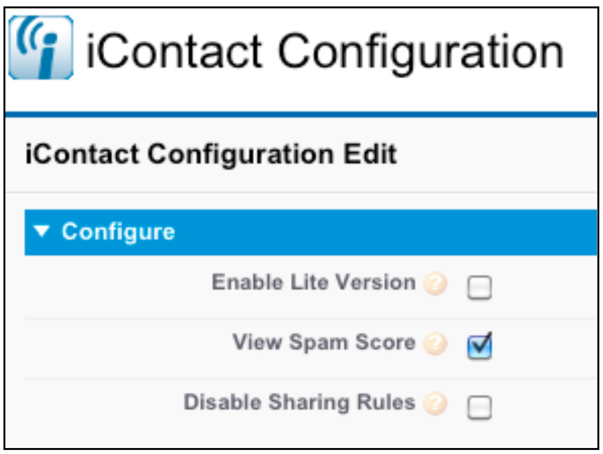
iContact for Salesforce has included an easy way to configure its settings. Installed with the package is an iContact Configuration tab where you can configure default settings. Your System Administrator will set this information. Depending on the settings chosen by your System Administrator, you may or may not be able to view this tab.

To access the iContact Configuration tab:

1. Click **All tabs** (**+** or **>** on far right tab)

or

2. Click on 



2.1 Enable Lite Version

The default unchecked setting is “Normal” and is recommended for full use of all of iContact’s features. Checking “Enable Lite Version” will prevent iContact from storing contact and lead email statistics to conserve Salesforce storage space. This will also disable some features such as Targeted Sending.

2.2 View Spam Score

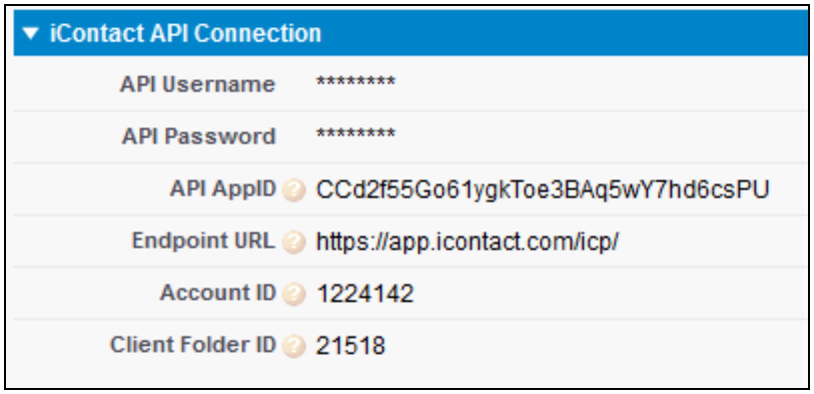
Checking this box will display the Spam Check Scores of emails before they are sent. The Spam Score is always displayed on the iContact Sent Message Detail page and provides a numerical assessment of how likely a message is to be marked as spam.

2.3 Disable Sharing Rules

The “Disable Sharing Rules” default setting of *unchecked* keeps your Salesforce organization’s permission settings (org-wide, roles, and sharing rules) intact. When the “Disable Sharing Rules” setting is *checked*, sharing settings that prevent an iContact for Salesforce user from accessing an iContact Campaign for sending or updating will be ignored. For more details regarding sharing rules please see your Salesforce System Administrator or the iContact for Salesforce Installation and Configuration Guide.

2.4 iContact API Connection

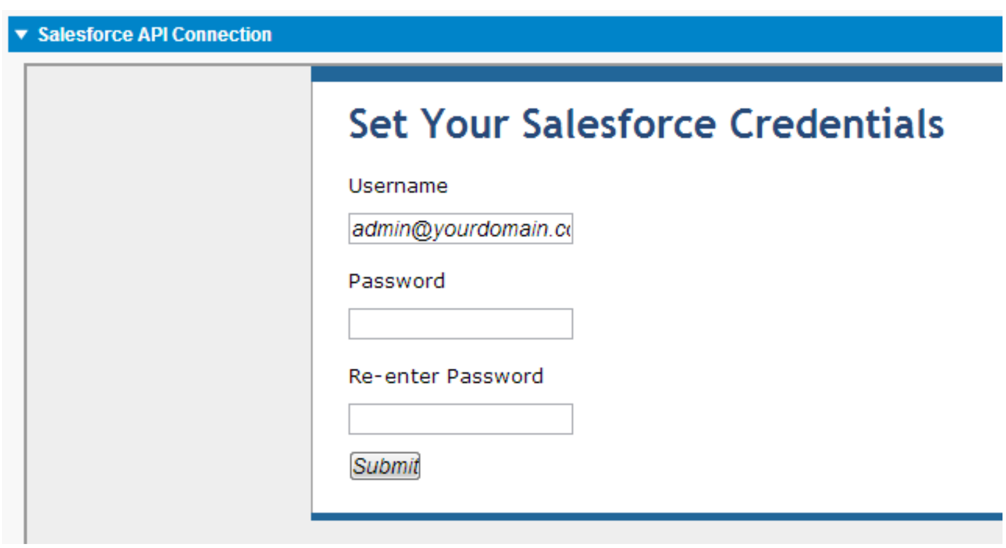
Also located on this page is the ‘iContact API Connection’ section. The information in this section contains the authentication information that is required to connect iContact and Salesforce. This information only needs to be edited once, by the System Administrator, upon initial installation and setup of the iContact for Salesforce application. The information is provided in the installation email and should only be changed unless directed to by iContact Support.



2.5 Salesforce API Connection

In this section, a System Administrator can enter their Salesforce username and password to ensure that iContact and Salesforce are properly synced. This is performed upon initial setup, but also needs to be done any time the System Administrator’s password is changed.

NOTE: To avoid needing to frequently re-sync iContact and Salesforce, one option is to create a non-human user account with System Administrator permissions and a password that never expires. That user’s credentials can then be entered to authenticate the account. Please refer to your Installation and Configuration Guide for more information on this step.



3. Creating a Message

iContact for Salesforce allows you to leverage your existing Custom and HTML templates and send them out to your contacts. If you aren't familiar with the process of creating templates in Salesforce, please see the video tutorials entitled "Create a Template Folder", "Create a Custom Template", or "Create a Letterhead Template" at http://www.icontact.com/salesforce or visit the Help & Training section within your Salesforce org.

3.1 iContact MessageBuilder

If you don't already create your own templates, we provide access to the iContact MessageBuilder editor for all of our iContact for Salesforce clients. The MessageBuilder editor allows you to select from hundreds of pre-designed templates and create great email content without needing to know HTML.

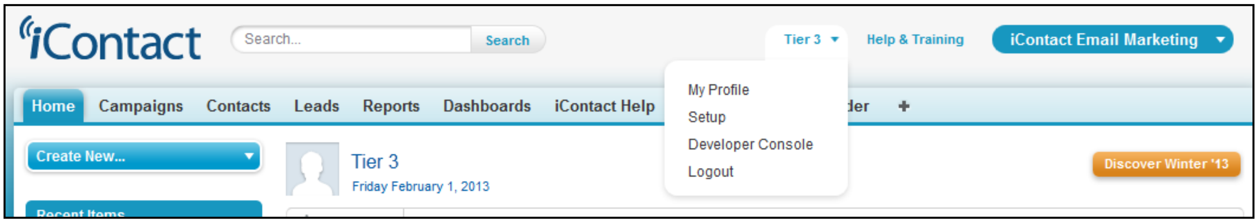
If you are interested in getting started with MessageBuilder, you can quickly do so by signing up for an iContact trial account at www.icontact.com.

We have video tutorials for how to use MessageBuilder here: https://www.icontact.com/resources/email-marketing-tips.

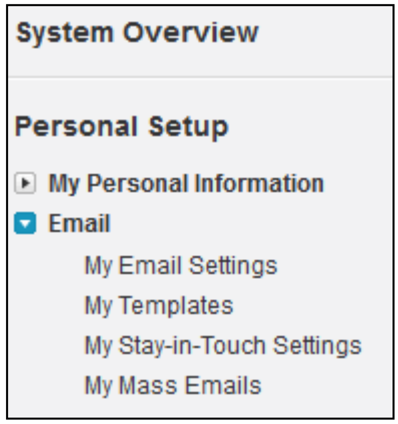
3.2 Bringing Your Message into Salesforce

Once you have created a message in MessageBuilder, you will need to copy the source HTML of the message into a custom Salesforce template before you will be able to send it through iContact for Salesforce:

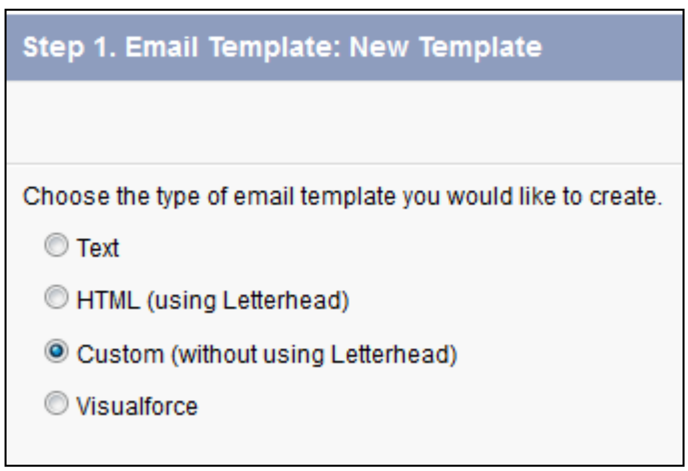
1. In the message editing toolbar, click the Message icon and then click Source to bring up the HTML for your message. Copy the HTML.
2. Now, in Salesforce, go to the Setup menu:



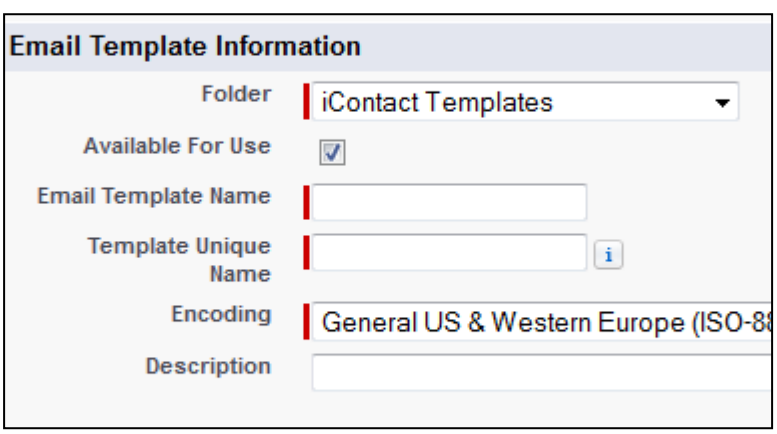
3. Go to Personal Setup > Email > My Templates



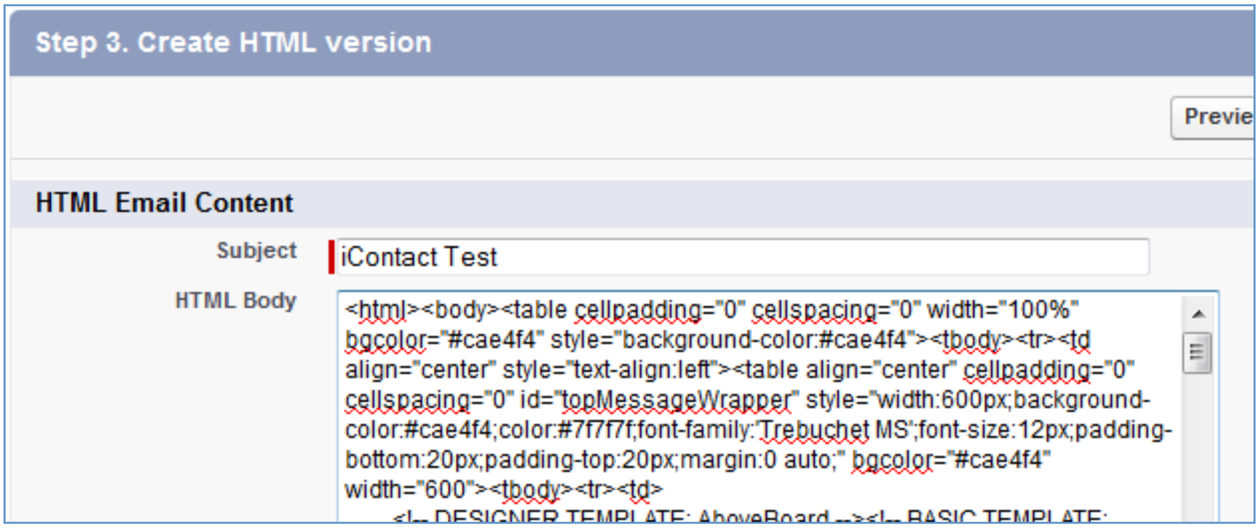
4. Click the New Template button and select ‘Custom (without using Letterhead)’



5. You will be prompted to select the template folder and name your template. Make sure to click the ‘Available for Use’ checkbox or you won’t be able to select the template later.



6. Paste your HTML code from MessageBuilder into the HTML body section.

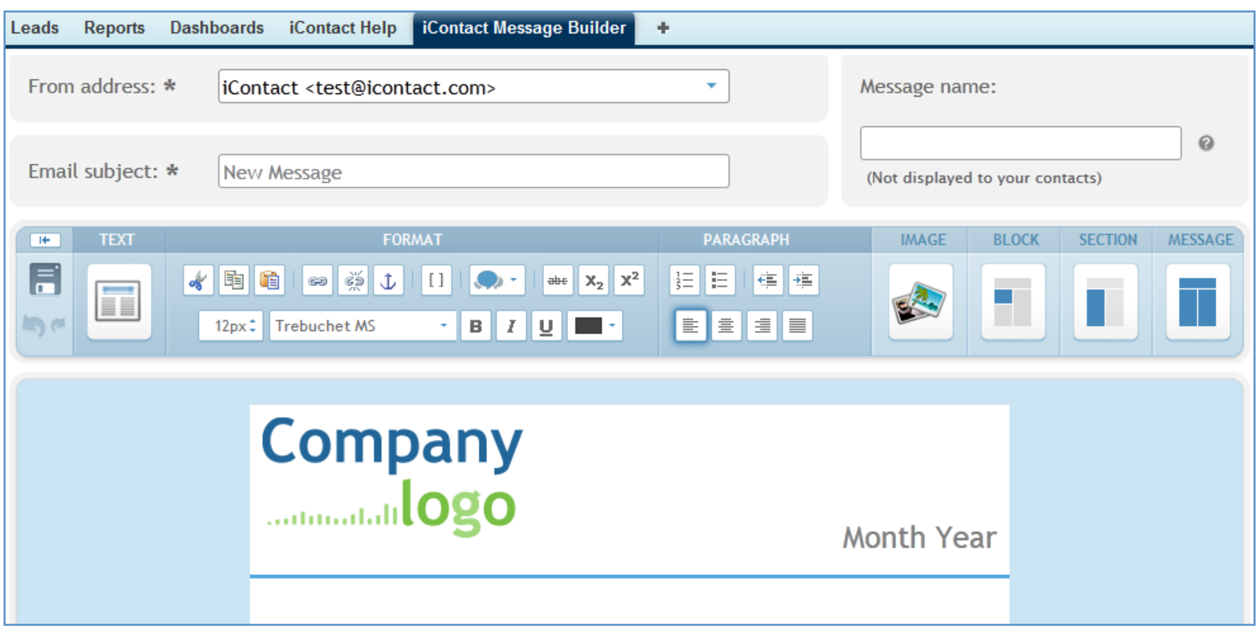


7. Click Save.

8. You now have the option to create a plain text version of your message. This is for any recipients who are unable to receive HTML emails. We recommend to click the ‘Copy text from HTML version’ button as this will automatically copy the text from your message. However, you do also have the option to customize your own text version.

3.3 Custom tab for iContact MessageBuilder

Salesforce also provides the ability to create a custom tab so that you can use the iContact MessageBuilder from within Salesforce. You will still need to follow the steps outlined in Section 3.2 in order to bring your template into Salesforce.



If you are interested in installing this tab, please refer to your installation and configuration guide or contact Support for more information.

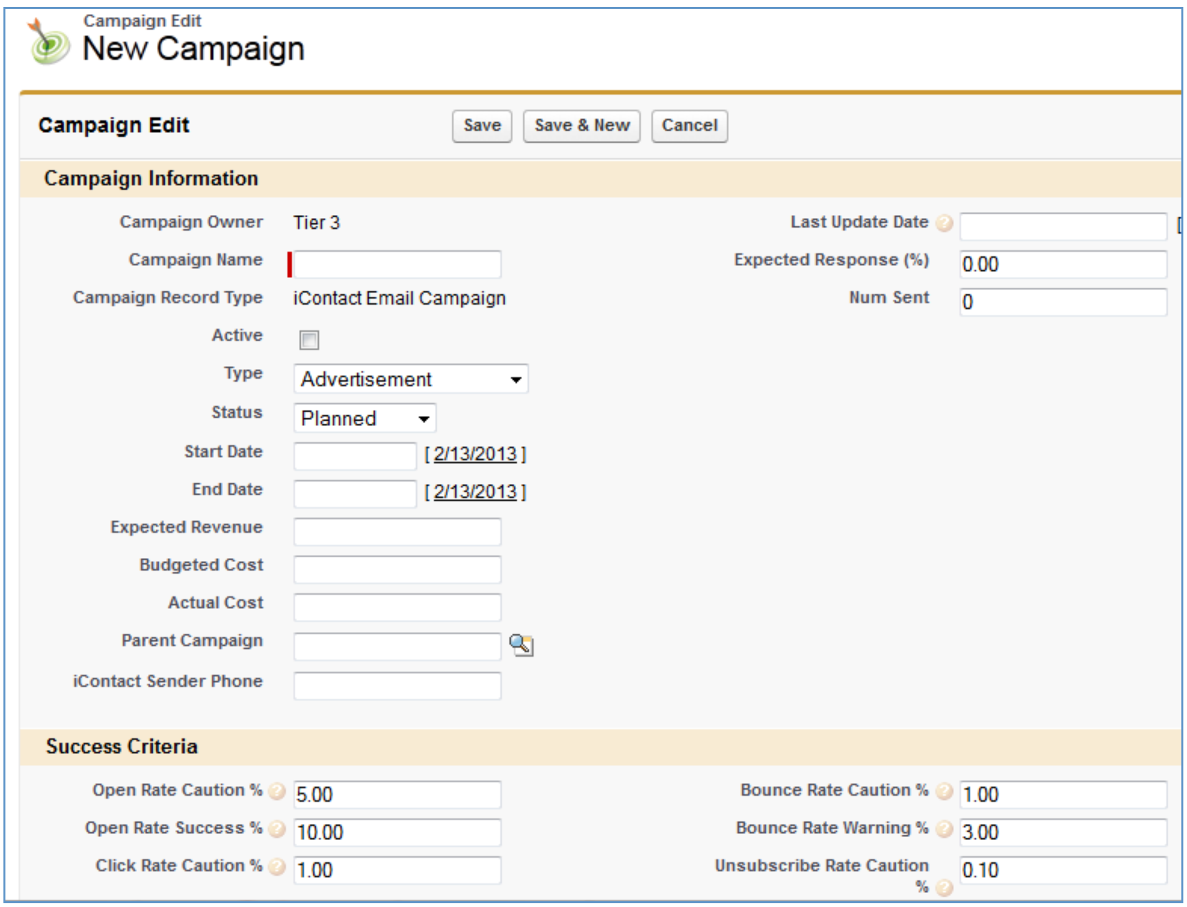
4. Getting Ready to Send

****Before any send, best practices recommend that you send your message to small set of internal users that includes you. This is in order to fully test that a send works as expected, especially as some email clients will sometimes render the message differently than expected.**

4.1 Creating an iContact Campaign

Since iContact is tightly integrated with Salesforce, beginning your email marketing is as simple as creating a Campaign in Salesforce. In Enterprise and Unlimited Editions, iContact uses a new record type called iContact Email Campaign.

1. Create a new Campaign and, if prompted, select the “iContact Email Campaign” record type to create an email marketing Campaign (if using Professional Edition, you will not be prompted). You must have “Marketing User” permissions in your Salesforce org to be able to create a new Campaign.



2. Specify a name for your iContact Email Campaign
3. If you have the appropriate permissions in Salesforce, you will be able to adjust your email marketing success criteria. These can also be adjusted later from the Campaign page.
4. Mark the Campaign as active.
5. Click Save

Once you create your new iContact Email Campaign, you’ll notice four new iContact buttons: **Update Statistics**, **iContact Send**, **Targeted Send** and **iContact Help**. These buttons, except for **iContact Send**, are also located on the iContact Sent Message page

Update Statistics – This button will update different things related to your Campaign or Sent Message, depending on which page you are on. From the Campaign page, the Update Statistics button will update the statuses as well as statistics (opens, clicks, bounces, unsubscribes) for **all** messages within your Campaign. From the Sent Message Detail page, the Update Statistics button will be disabled until your message has sent (indicated by a status of Released). When the message's status changes to Released, you may use the Update Statistics button to update the status and statistics for this individual message. ***Important: On the Campaign level, you must refresh your browser to see the updated data. Statistics will NOT update unless the Update Statistics button has been clicked.***

iContact Send – This button begins the process of sending your message through iContact for Salesforce. Before beginning this process, be sure that you have added all Contacts and/or Leads to whom you would like to send to your Campaign, and you have your email template prepared and saved within Salesforce.

Targeted Send – This button allows you to send an email to targeted recipients, based on past action or inaction within this Campaign.You may send a targeted send from the Campaign level, or from a specific Sent Message.

iContact Help – Please use the iContact Help button for a quick overview and helpful details for the particular page that you are on.

4.2 Creating Your List of Recipients

You must add members to your Campaign before you may begin the sending process. If you do not have any Campaign members when you attempt to send your message, a warning will display requesting that you add Campaign members. To create your list of email recipients, you have several options to add contacts or leads to your iContact Email Campaign. All of these options use standard Salesforce functionality. Please refer to the video tutorial entitled "Create a Campaign & More" to see this process performed.

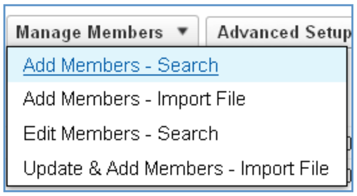
4.2.a. Add from Salesforce Report or View

You may add Contacts/Leads to your Campaign through other standard methods, such as running a report or creating a list view, and then selecting **Add to Campaign**, and following the prompts. Note that the report must be built on a Contact or Lead object or the Add to Campaign button will not be visible.

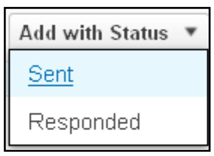
Example:

4.2.b. Add via Search

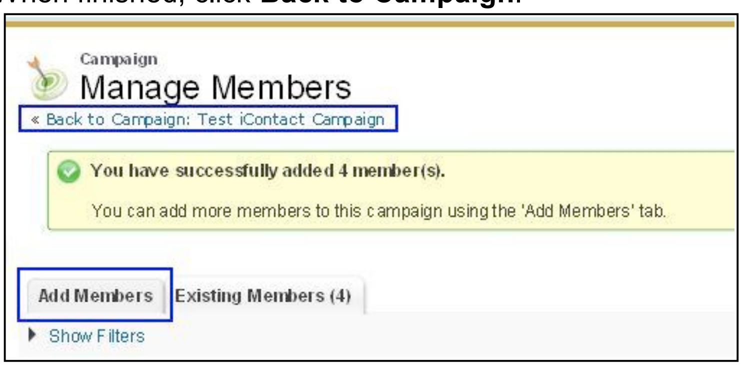
1. From the Campaign, click **Manage Members** and choose **Add Members – Search**



2. Select to search for Leads or Contacts
3. Use Salesforce's filter criteria to perform your search
4. Select the contacts or leads that you would like to add and click **Add with Status**,
choosing either Sent or Responded. Please note that for the purposes of the iContact for Salesforce integration, it does not matter which status you choose.

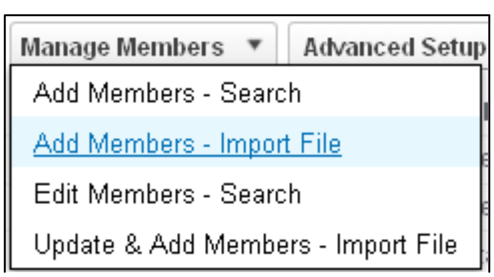


5. To search again and add more contacts or leads, click the **Add Members** tab within the **Add Members – Search** option.
6. When finished, click **Back to Campaign**.



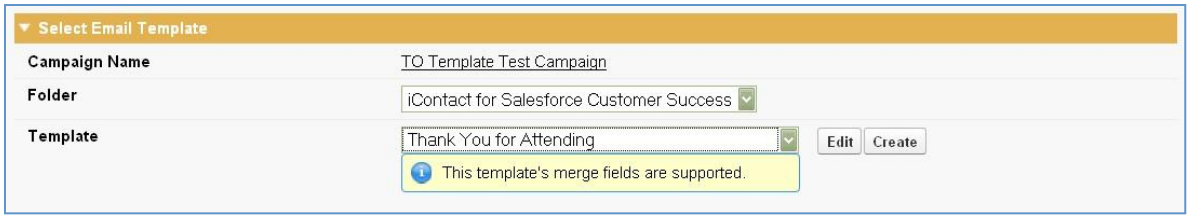
4.2.c. Add via File Import

1. Click **Manage Members** and choose **Add Members – Import File**



2. Follow the prompts by the Salesforce Import wizard to upload your .csv file.

4.3 Selecting Your Email Template



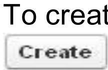
1. To begin the email send process, click the **iContact Send** button on your Campaign page.

    a. Use the dropdown boxes to choose the appropriate folder and template. If your email template contains any mail merge fields, iContact will check their validity automatically. You will receive one of three messages:

    i. "This template has no merge fields"
    ii. "This template's merge fields are supported"
    iii. "Unsupported merge fields detected.
    The unsupported fields have been highlighted in the preview below.
    For a list of supported merge fields, please see the list of iContact merge fields."

2. iContact for Salesforce includes options to **Edit** or **Create** an email template from the Send iContact Message page. Clicking either of these buttons will take you to your Email Communications area of your Setup menu. Edit or create your template as needed, then return to your Campaign, click **iContact Send**, and choose your folder and email template.

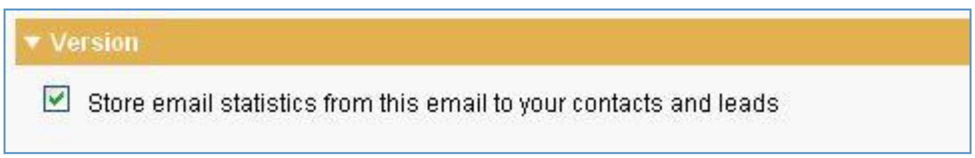
4.4 Specifying Your Sending Options

1. Select the appropriate **From Option** from the drop down menu.
2. To create a new from option, choose either **New** from the dropdown, or click the 

button. Your new From Option information will be saved upon sending. Do not click Create again, as it will remove your information.
3. You may also edit existing **From Option** details. These changes will be saved when you send your message and will appear the next time you choose a **From Option**.
4. Currently, it is not possible to delete From Options.
5. Enter the name, email address, and physical address from which this message will be sent. This information is required by US CAN-SPAM law as well as iContact policy and will be automatically added to the footer of your emails. All fields are required.

4.5 Setting the Version

The system administrator sets the default version of iContact for Salesforce in your Salesforce organization on the iContact Configuration page. If your org is set to Normal version, the **Version** box on the iContact Send page will be checked by default, like below. **Normal** version stores statistics on the Campaign member level and is recommended for most users. Storing this data on the Campaign member level allows you to use targeted sending options and view detailed reports.



Sending your message with the box unchecked enables the **Lite** version. The Lite version does not store information on the Campaign member level and may benefit users with storage capacity concerns. Utilizing the Lite option will prevent the use of certain features such as Targeted Sending and detailed reporting. If you choose the option that is not your default setting, you will receive the following warning message before the message is sent. If you intended to change this setting, click OK to continue.

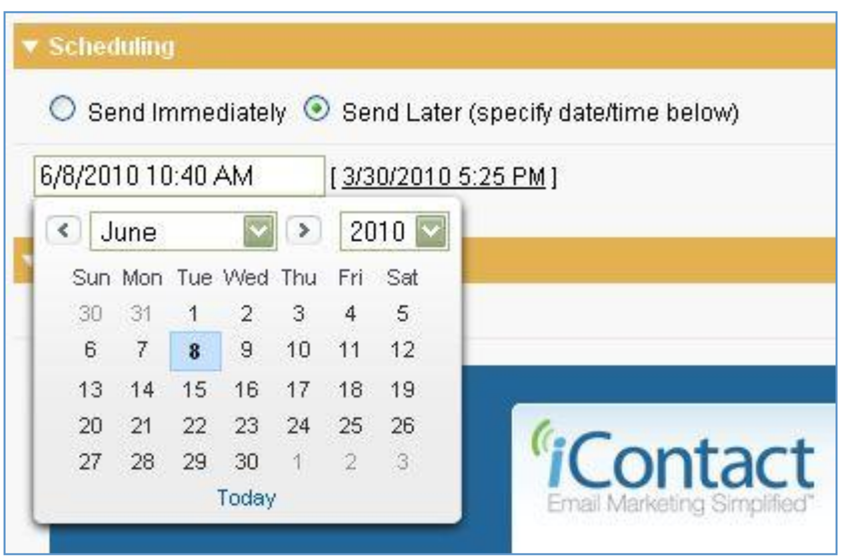
4.6 Accept Terms and Conditions

Enter your initials where indicated. iContact requires that senders have explicit permission from their recipients to send them marketing emails. Your user initials are required as acknowledgement that you have permission to send to each of your recipients. This policy ensures that iContact has a high deliverability rate and successfully delivers as many of your emails as possible. Please review our complete Anti-Spam Policy at http://www.icontact.com/terms/antispam, and feel free to contact iContact for Salesforce Support with any questions.

4.7 Scheduling Your Email

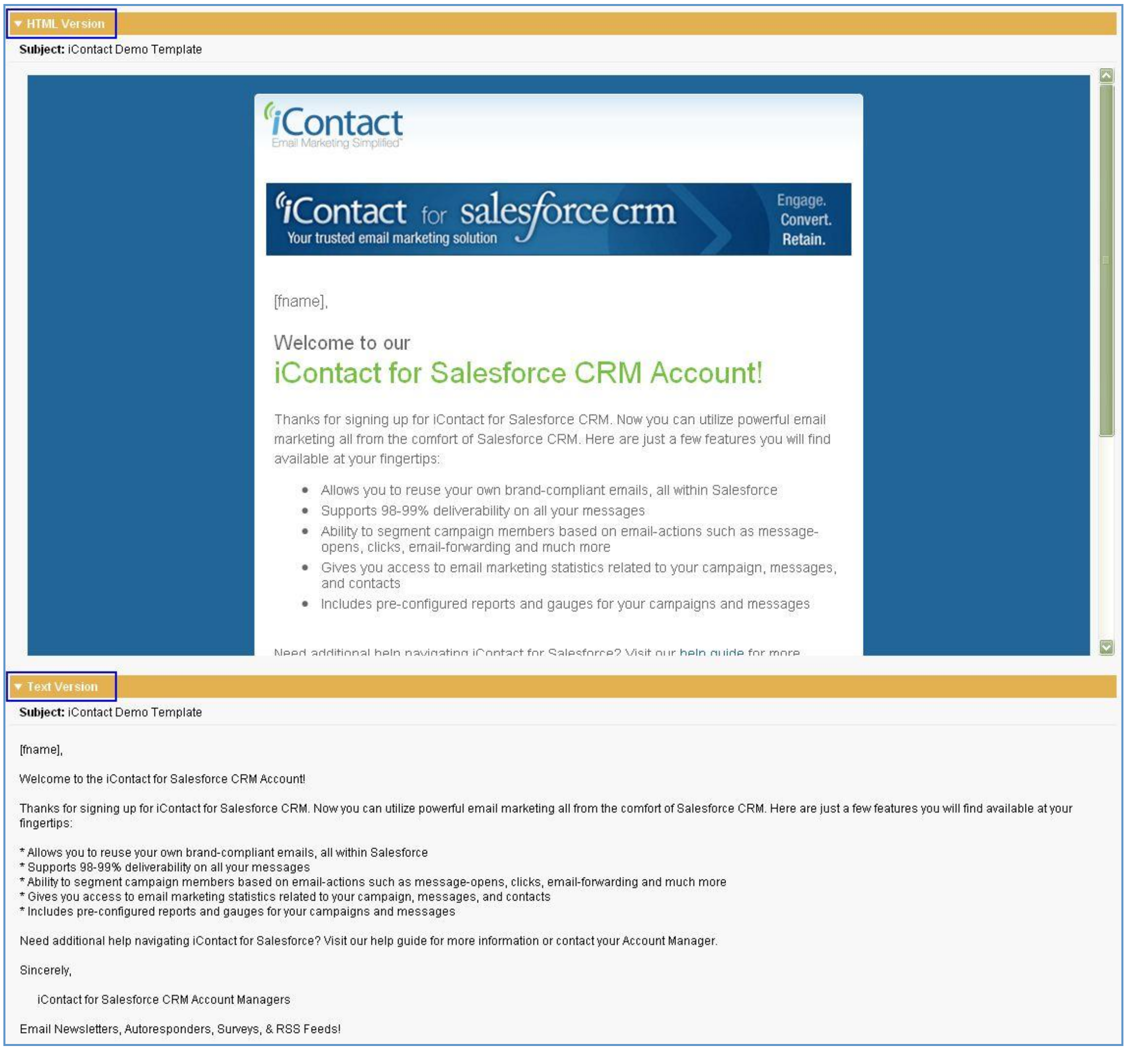
iContact for Salesforce offers the powerful option of sending your message immediately, or scheduling the message to be sent at a later date. To queue your message to send immediately, leave the **Send Immediately** option selected. This means that your message will be transferred from Salesforce to iContact as soon as you complete this sending process. It will be queued in iContact for immediate release. This process may take a few minutes, depending on several factors that include but are not limited to your message itself, the number of recipients, etc. **Always confirm successful release of your message by checking that the status of the message is "Released".**

You can also select to send your message at a future date and time using the standard Salesforce date/time picker. Click the **Send Later** radio button to view the date picker. Click within the date field to make the Salesforce calendar appear. Navigate the calendar to select the date that you would like your message to be queued for sending. You can manually change the time in this field for the send. Clicking on the date to the right of this field will reset the time to the date and time that you opened this page. The date and time displayed here match the time zone from your Salesforce user settings.



4.8 Previewing Your Email

iContact for Salesforce provides an easy way to preview your text and HTML messages. When you select your email template, the HTML preview for an HTML or Custom type template, and the text preview are displayed at the bottom of the iContact Send page.

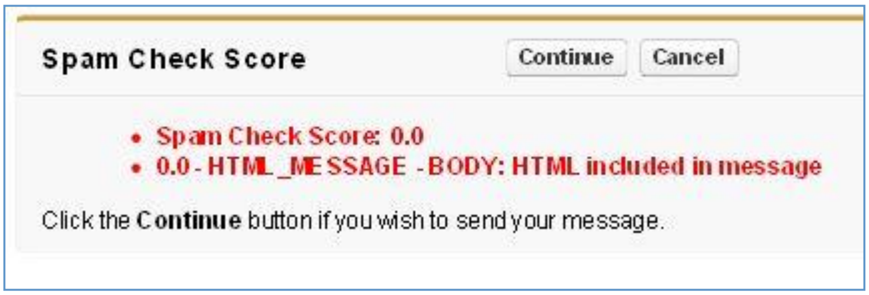


4.9 Sending Your Email

When satisfied with all settings, click Send to Campaign Members at the top or the bottom of the page.

If you have Spam Check Score turned on, you will see your message's spam score with any available information about the score. You may then choose to continue with the send or cancel to edit your template.

If your spam score is higher than 5.0, whether you have Spam Check Score turned on or not, your message will not be allowed to send through iContact. You'll be prompted to edit your template to lower the spam score.



5. Viewing the Results

There are several ways to view the results of your sent messages. Before viewing any statistics, make sure that your information has been updated.

5.1 Using the Update Statistics Button

In order to view up-to-date statistics, click the Update Statistics button on the Sent Message Detail page or the Campaign page. Statistics **do not** update automatically so this button must always be clicked in order to view statistics.

Important: For your convenience, both the Campaign page and the Sent Message pages include a field called **Last Update Date**. This field displays the last time that this information was updated. After clicking the Update Statistics button on the Campaign page, you will need to refresh your browser to view the updated statistics. The pop-up Campaign Update window may be closed while it is working and you may reopen it at any time during the process.

The next few sections review different ways to view and report on the results of your message.

5.2. Campaign Level Reporting

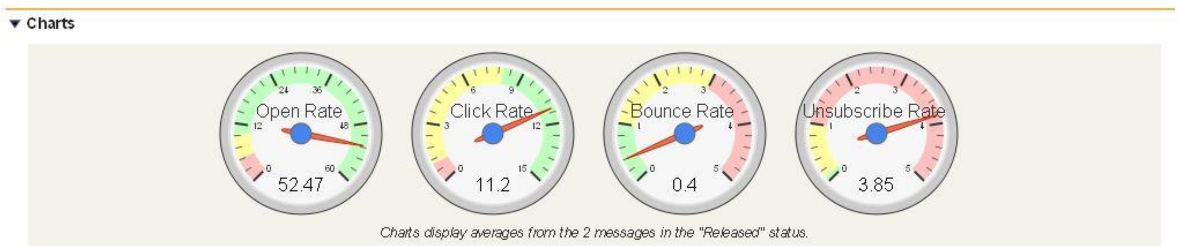
The reporting shown on the iContact Email Campaign page is aggregate reporting across all released messages in your Campaign.

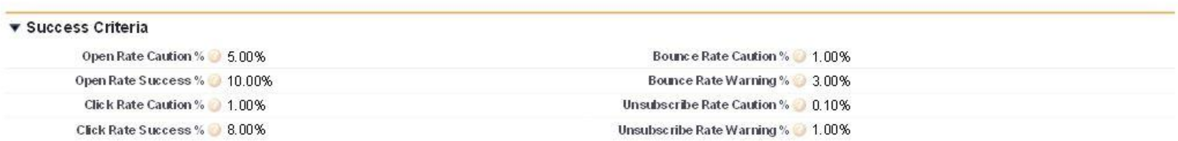
5.2.a. Campaign Impact

The aggregate results of your Campaign's messages are displayed in numerical form in the **Campaign Impact** section.

5.2.b. Campaign Charts and Success Criteria

The Campaign Impact figures are translated into visual form in the **Charts** section. The Success Criteria allows you to customize the ranges on the gauge charts for optimal viewing of the Campaign and message level data for your particular needs.





iContact has provided default ranges for the open, click, bounce, and unsubscribe rates based on general email marketing averages. Acceptable ranges for these numbers can vary for many reasons, including as industry, the Campaign, the recipients, the message, and more. The provided values are general guidelines to help you get started. The default values iContact provides are as follows:

- Open Rate Caution %, where chart goes from red to yellow, 5%
- Open Rate Success %, where chart goes from yellow to green, 10%
- Click Rate Caution %, where chart goes from red to yellow, 1%
- Click Rate Success %, where chart goes from yellow to green, 8%
- Bounce Rate Caution %, where chart goes from green to yellow, 1%
- Bounce Rate Warning %, where chart goes from yellow to red, 3%
- Unsubscribe Rate Caution %, where chart goes from green to yellow, 1%
- Unsubscribe Rate Warning %, where chart goes from yellow to red, 3%

With the appropriate Salesforce permissions, you can edit the success criteria for an entire Campaign when creating the Campaign or by editing the Campaign at any time. You may also edit the success criteria fields on the individual iContact Sent Message.

5.2.c. Campaign Sent Messages

You can see how each of your messages within the Campaign has performed by viewing the **iContact Sent Messages** section on the iContact Email Campaign page. This section shows Unique Opens, Total Opens, Unique Clicks, Total Clicks, Bounces, Delivered, Unsubscribes, and whether or not the message was a Targeted Send. These fields shown can be edited on the Campaign page layout.

To get more detailed message-specific reporting, click on the subject line of a message.

5.3. Message Level Reporting

The reporting shown on the iContact Sent Message Detail page is data collected from that particular message only.

Your message *status* will automatically update in near real-time with no user interaction required. Once your message status is Released you can update the statistics at any time by clicking the Update Statistics button. The following describes the possible states for your message:

- **Scheduled** – This message is scheduled to be sent, but has not begun the sending process. Messages in this state can usually be cancelled by clicking the Cancel Send button. Deleting the message from Salesforce will **NOT** cancel an active send.
- **In Progress** – This message is in the sending process. It will be sent shortly. This message can no longer be cancelled.
- **Released** – This message has completed sending and message statistics can be updated.
- **Cancelled** – This message was successfully cancelled by the user by clicking the Cancel Send button. The message will not be sent.
- **Error** – This message experienced an error. The state will be followed by additional details and an error message. See Troubleshooting Section for more information

5.3.a. iContact Sent Message Detail

Once you have sent your message, the iContact Sent Message page will be shown. You'll notice the following buttons.

Update Statistics – Once the message status is Released the Update Statistics button will be enabled. You can use this button to update your message statistics. Please be sure to always update before using Targeted Send or Reporting.

View Message Body – This button allows you to view the message body at any time.

Targeted Send – This button allows you to send an email to targeted recipients, based on past action or inaction within this message.

Cancel Send – This button allows you to cancel a scheduled message. If the message is currently sending or has already been sent, the button will be disabled. Again, note that deleting a send in Salesforce simply removes it from view, it does NOT cancel the send once already scheduled.

iContact Help – Please use the iContact Help button for a quick overview and helpful details for the particular page that you are on.

The **Message Properties** section of the iContact Sent Messages page informs you of the overall status of the message, including the times that the message was scheduled and released, the last update date, status, version, template, etc.

5.3.b. Message Statistics

The **Message Statistics** section displays the core results from your message sent. This information is also translated into the gauges below the **Charts** on this page and contributes to the calculation of the **Message Impact**; see Section 7.5.

The following is a guide to the meaning of each term found in the Message Statistics:

Released The number of messages that iContact attempted to send.

Delivered The number of emails that successfully sent. NOTE: Some contacts may have a status in iContact where messages can't be delivered to them, such as Unsubscribed, Do Not Contact, Bounced or Invitable. If this is the case, they may still appear as members of the campaign but will not appear in the Delivered category once the message is sent.

Unique Opens This reports the number of recipients that opened your message.

Total Opens This reports the total number of times that all recipients have opened your message. For instance, if 5 people open the message once and one more person opens the message 5 times, the total opens would be 10.

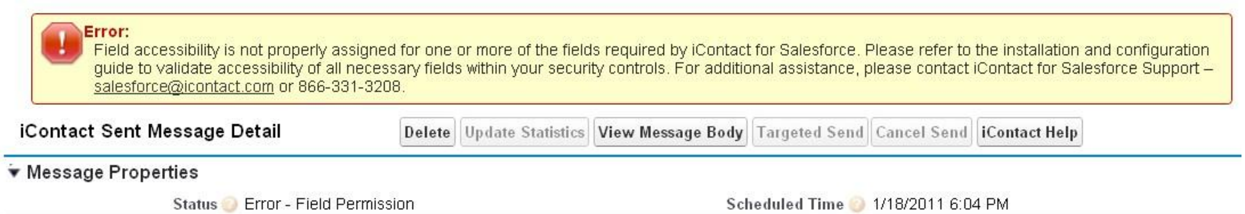
Unique Clicks This reports the number of recipients that clicked on your message.

6. Troubleshooting

6.1 iContact Sent Message Errors

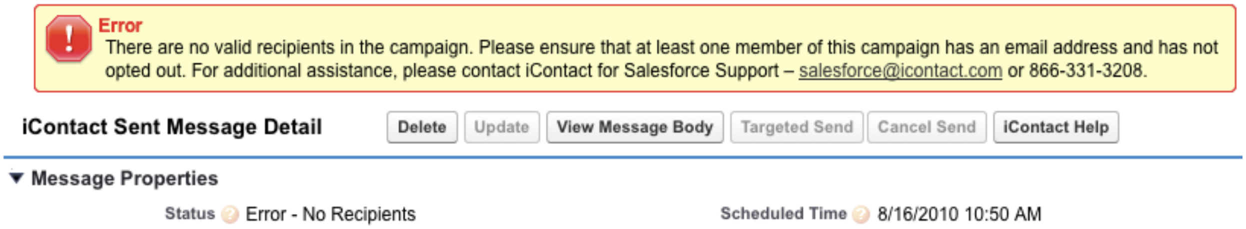
There are 5 Error states that iContact for Salesforce may display. These are listed below followed by an example image of the error displayed.

1. **Error – Field Permission**



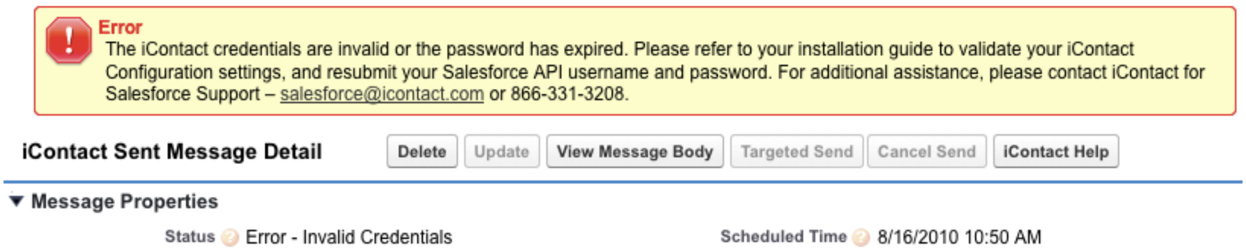
   a. Please refer to the Installation and Configuration Guide to validate the accessibility of all necessary fields. For Enterprise and Unlimited Editions, this information can be found on pages 7-10 of your guide. For Professional Edition, this information can be found on pages 14-16 and 20-22. Be sure to follow the directions fully for both Contact and Lead objects even if you only use one of the two in your org as both are required for the iContact for Salesforce integration to operate.

2. **Error – No Recipients**



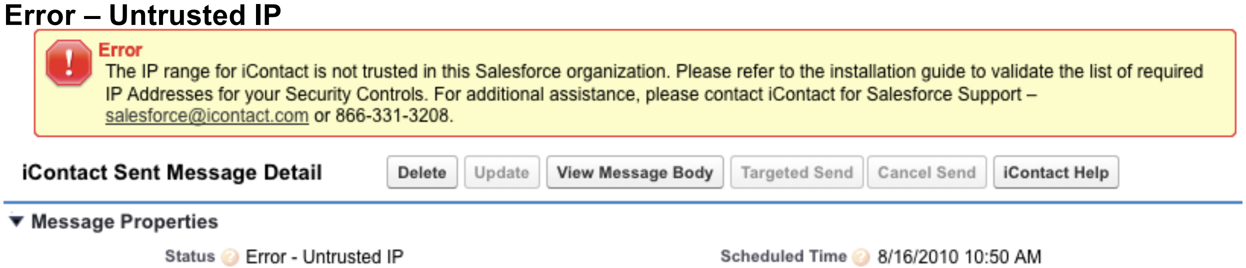
a. Please review the members of your campaign to ensure there is at least one member who has an email address and Email Opt Out unchecked on their contact profile.

3. **Error – Invalid Credentials**



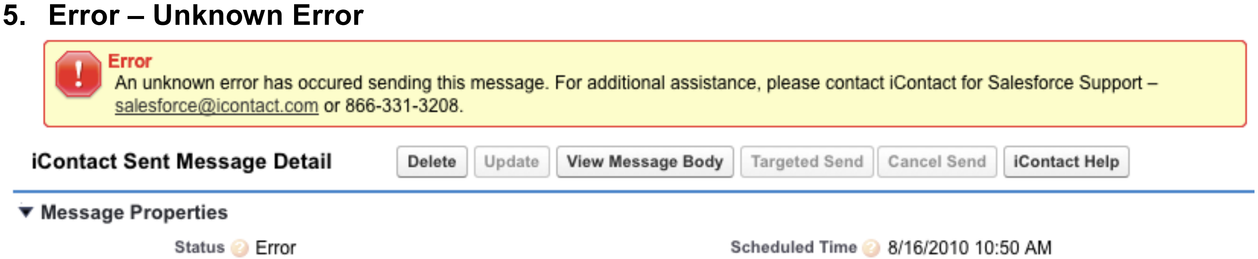
a. Please refer to Section 2.5 for directions on how to resubmit your Salesforce API credentials.

4. **Error – Untrusted IP**



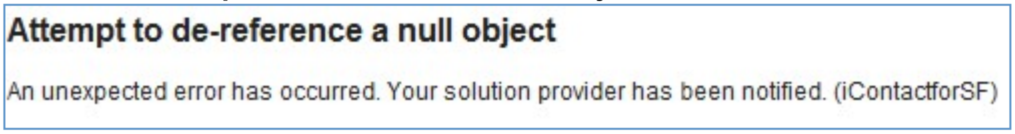
a. Please validate the trusted IP ranges set within your Setup menu. This information is located on page 7 of your installation and configuration guide.

5. **Error – Unknown Error**



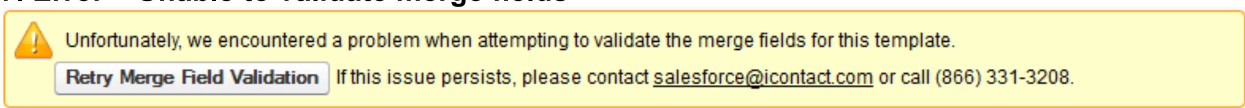
a. Please begin by resubmitting your Salesforce API credentials on the iContact Configuration tab (see section 2.5), then try to send again. Should these steps not resolve the issue, please contact iContact Support for further assistance.

6. Error – Attempt to de-reference a null object



a. Please begin by resubmitting your Salesforce API credentials on the iContact Configuration tab (see section 2.5).
b. Check the HTML version of your code for any links containing 'click.icptrack.com.' This indicates links that were copied and pasted from and old email and will result in this error. These are redirected links which need to be replaced by the direct link to the URL. For any questions about this, please contact iContact Support.

7. Error – Unable to validate merge fields



a. This error also indicates that Salesforce and iContact are not connected. To resolve this, resubmit your Salesforce API credentials (see section 2.5).

7. FAQ

1. **What merge fields are supported in iContact for Salesforce?**

Although we can support most Salesforce merge fields, there are some limitations that prevent us from being able to support all. For information on which merge fields are and are not supported, please refer to: http://salesforce.icontact.com/email_merge_fields.

We support most Salesforce custom fields, with the exceptions of the following categories:

- Date
- Text formula
- Long text area (32,000 characters)
- Rich text (32,000 characters)
- Lookup
- Multi-picklist

2. **How do I cancel a message?**

Salesforce gives the option to delete a message. However, this does NOT cancel a send that has already been scheduled. To fully cancel a message, you MUST click the "Cancel Send" button for your iContact Sent Message.

The reason for this is that this Delete button is a Salesforce feature that simply removes the message from the campaign.

3. **I have reached my data storage limit in Salesforce. What should I do?**

Although most clients will never reach their data storage limit, some frequent senders do find that the iContact Message Statistics take up a large amount of their data. One solution to this is to employ the 'Lite Version' of sends as this will no longer store statistics at the campaign and lead levels.

It is also possible to delete old statistic records using a Salesforce tool called the Data Loader.

4. **Why aren't statistics updating for my message?**

Statistics will NOT automatically update for a message or campaign. You must click the 'Update Statistics' button on either the message or campaign levels before statistics will update.

5. **I sent a message but the status hasn't changed.**

On rare occasions, a message may send but the status of the message will not change to Released. In these cases, you can actually manually change the status of the message to Released. This can be done by clicking the 'Edit' link next to the name of your message in the iContact Sent Messages section of your campaign.

6. **My message did not release to all members of my campaign. Why is there a discrepancy between the two numbers?**

iContact will send to all contacts that are subscribed to your list that are subscribed and have an email address. Here are four scenarios where we will not be able to send:

   a. No email address listed in the profile of the campaign member

Salesforce will allow you to add members to your campaign even if they don't have an email address stored in their profile. Obviously, if no email address is stored, iContact won't be able to send an email to that person.

   b. Campaign member is a duplicate

If there is more than one member of your campaign with the same email address, iContact will only be able to send to that email address once.

   c. Campaign member has unsubscribed

If the person has unsubscribed from a previous iContact email, they will no longer be sent any messages unless they choose to resubscribe. Salesforce will update the Email Opt Out box in their profile to reflect that they have unsubscribed, but they will not be automatically removed from the campaign. Note that if you haven't recently updated statistics, it is possible this box may not be checked. However, if they have unsubscribed

   d. Campaign member is in the 'Bounced' status in iContact

In addition to tracking bounces, iContact also designates a special 'Bounced' status for contacts. Contacts will enter this status based on a 'hard,' or permanent bounce (such as an invalid email address) or after five 'soft,' or temporary bounces. This status does not have an equivalent status in Salesforce, so the only way to determine which contacts are in this status is to log directly into your integrated iContact account.

7. **The ‘Add to Campaign’ button is not visible on my report when trying to add members.**

Salesforce only displays this button on the following report types: Account and Contact, Opportunities and Roles, Cases and Roles, and Lead reports. If a custom object such as iContact Message Statistics or iContact Sent Messages is being used, Salesforce will not be able to automatically add the report members to the campaign. The workaround is to export the report and upload to the campaign via the Manage Members feature (see section 4.2) or to create a custom report type.

8. **I don’t have the option to create a new campaign.**

This is an indication that you may not have the correct permissions in Salesforce to create campaigns. You must have the ‘Marketing User’ box checked in your user profile in order to be able to create campaigns. You must also have ‘Create’ permissions assigned to your profile for the Campaign object.