

iContact  
for



**(NOTE: Salesforce screen shots have been blurred due to proprietary information)**

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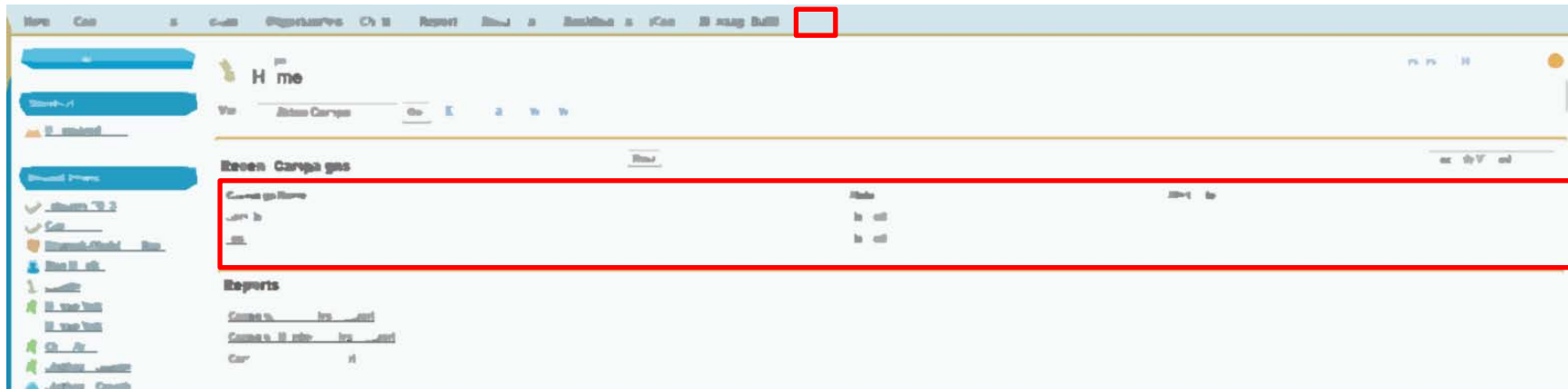
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## How do I add the Campaign tab?

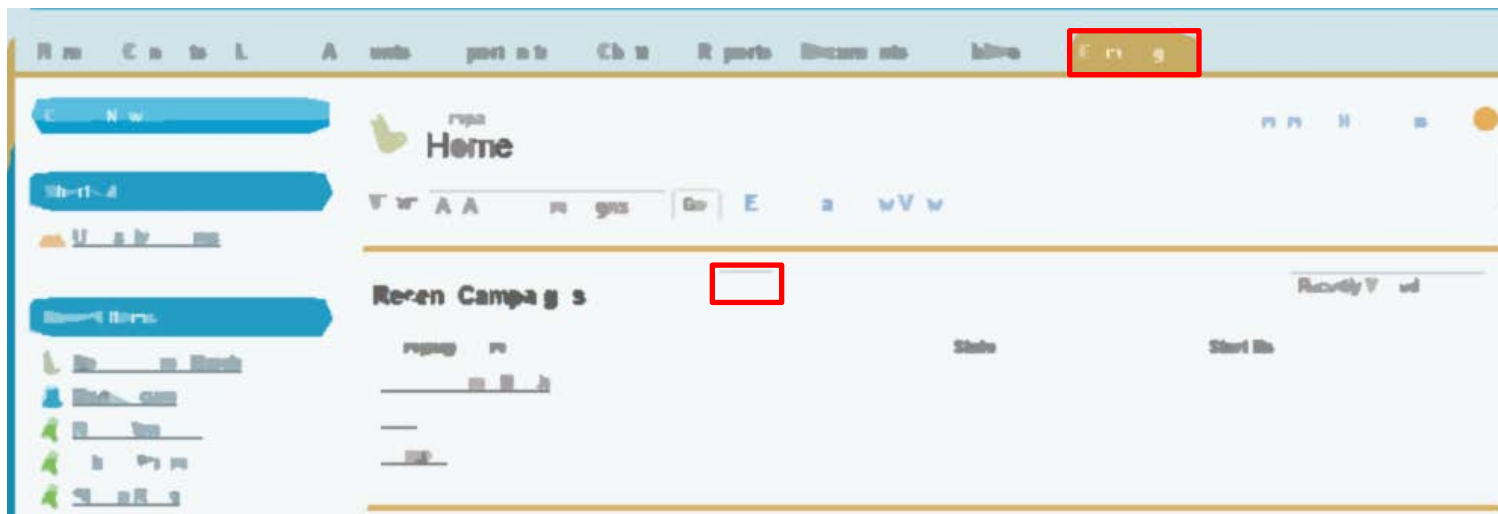
1. Click the + on the **Salesforce tab**.
2. Click on **Campaign** from the list of available tabs.



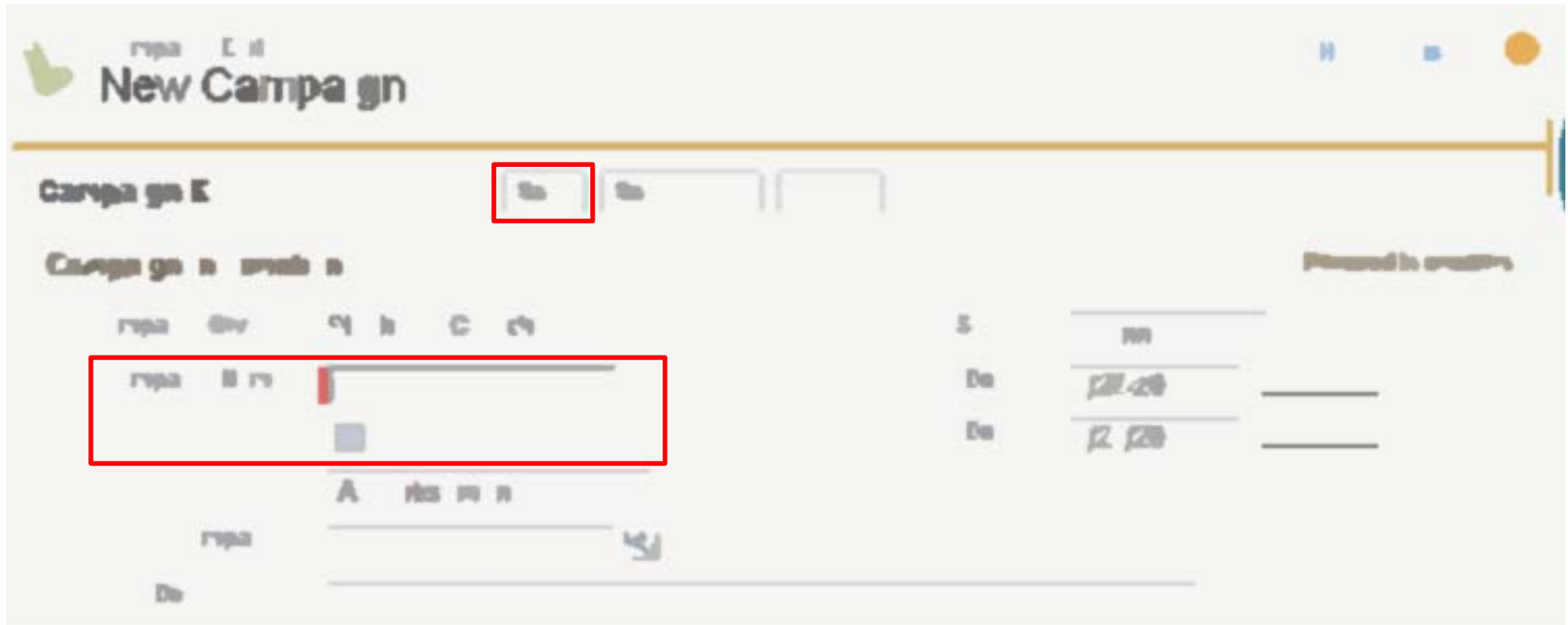
## How do I create and add members to a trackable email Campaign in Salesforce?

To track email marketing you must first create a campaign second add contacts/leads to the campaign.

1. Click the **Campaigns** tab.
2. Click **New**.



3. Enter **Campaign Name** (REQUIRED).
4. Check the **Active** box (REQUIRED).
5. Click **Save**.

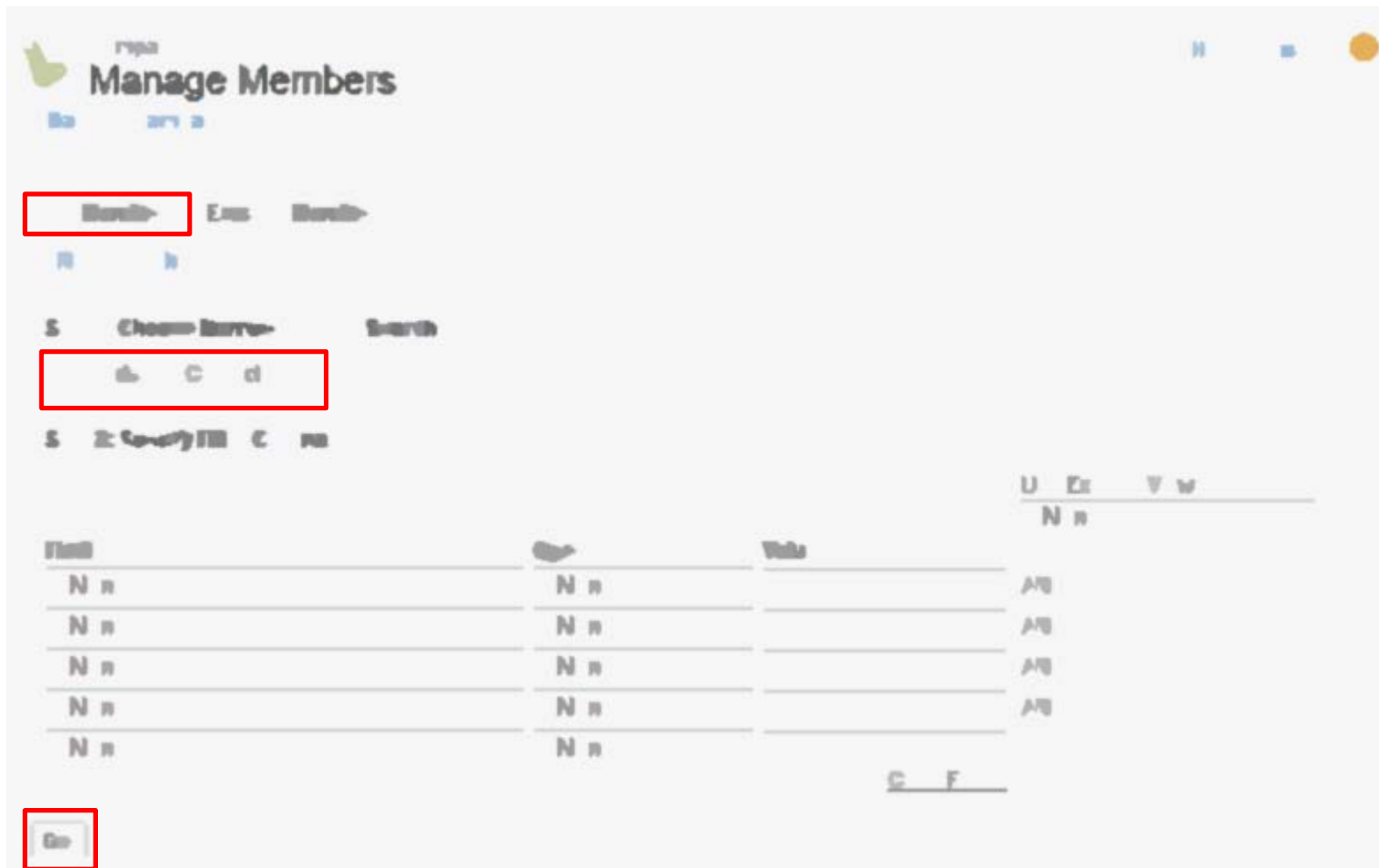


The screenshot shows the 'New Campaign' form in iContact. The 'Campaign Name' field is highlighted with a red box. The 'Active' checkbox is also highlighted with a red box. The 'Save' button is highlighted with a red box. The form includes fields for 'Campaign Name', 'Active', 'Start Date', 'End Date', and 'Save'.

6. Click the **Manage Members** drop down.
7. Click **Add Members – Search**.



8. In the Add Members tab click **Leads or Contacts**.
9. Click **Go!**



10. Click the **check box** next to the **name to add**.
11. Click the **Add with Status** drop down, click **Sent**.



Add with Status Drop down menu



12. Continue to add members or click **Back to Campaign** to exit campaign membership.

**NOTE:** Existing members tab now list all members associated with this campaign.



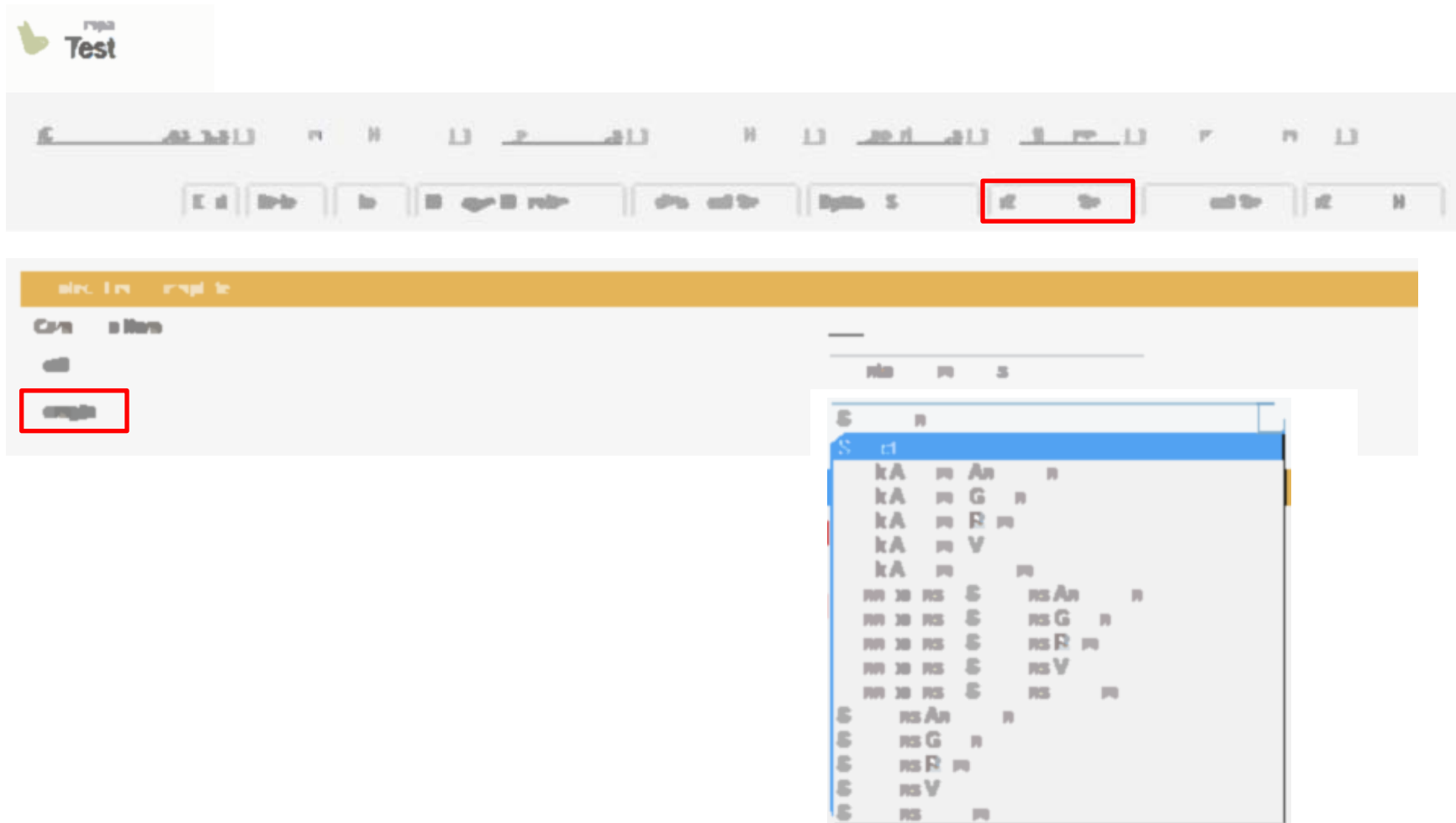


## How do I send an iContact marketing piece to a Campaign?

1. Click the **Campaigns** tab in Salesforce.
2. Click on the **Campaign Name** to open.



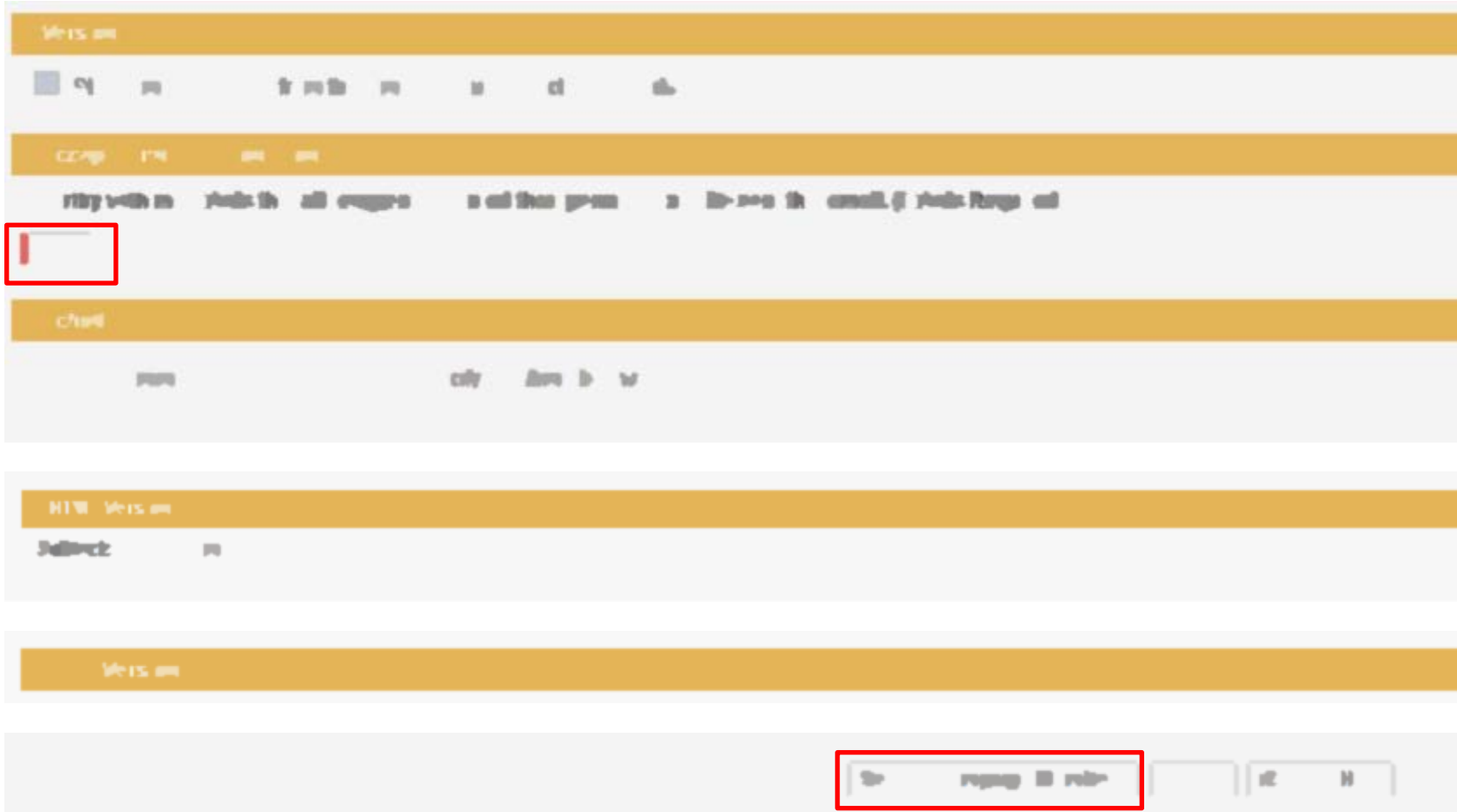
3. Click the **iContact Send** button to access the templates.
4. Click the **template** from the drop down menu.



4. Pick the **sender's name** from the From Option dropdown. (All other information will default).

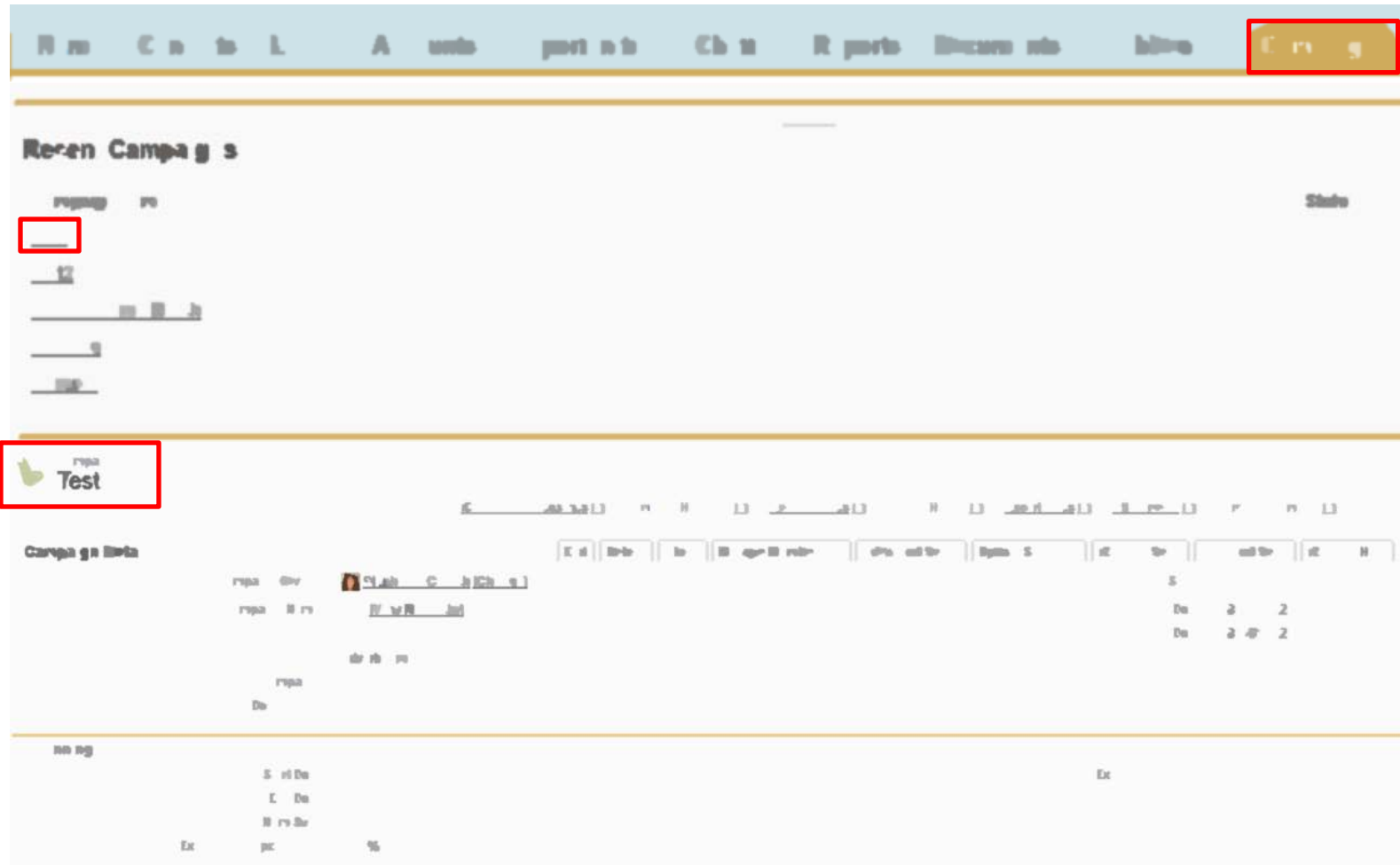


5. Enter your **initials** in Accept Terms and Conditions.
6. View the HTML Version and Text Version.
7. Click **Send to Campaign Members**.



## How do I view the Campaign results?

1. Click the **Campaigns** tab in Salesforce.
2. Click on the **Campaign Name** to view details.



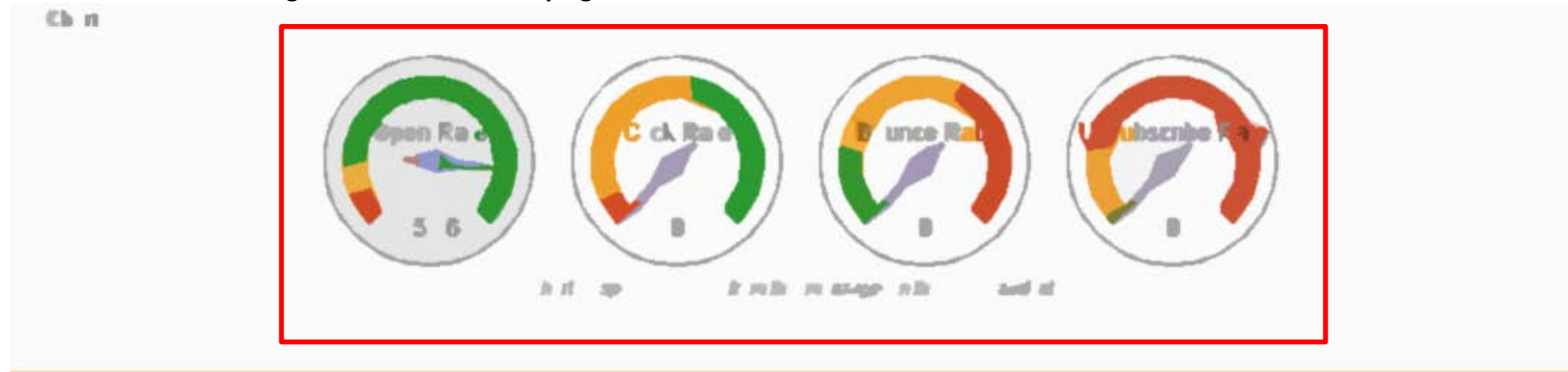
The screenshot shows the Salesforce interface for viewing campaign results. At the top, the navigation bar includes tabs for Home, Contacts, Leads, Accounts, Opportunities, Chatter, Reports, Discussions, and **Campaigns** (highlighted with a red box). Below the navigation bar, the page title is "Recent Campaigns". A search bar is visible on the left, with a red box around the search icon. The main content area displays a list of campaigns. The first campaign, "Test", is highlighted with a red box. Below the list, there is a detailed view of the "Test" campaign, showing its status, start and end dates, and other relevant information.

### What do the Campaign results mean?

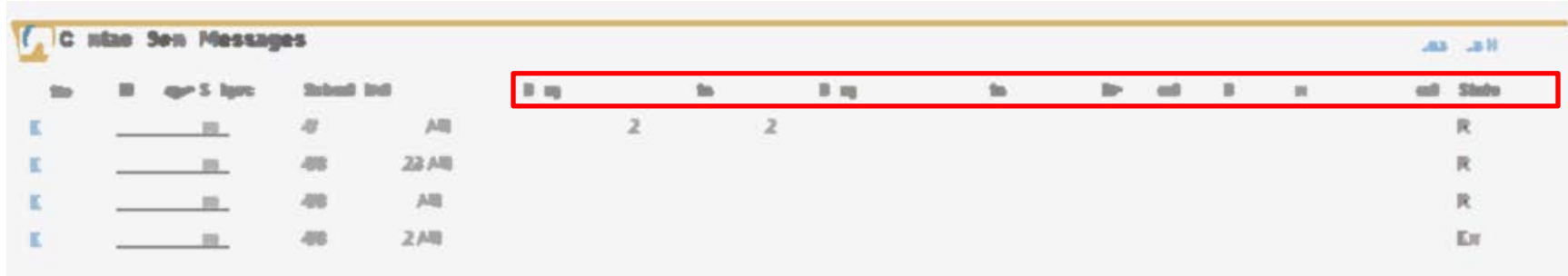
A campaign's result provides data by individual email. The kind of information contained in a result is who opened the email, if there was a link contained in the email, who clicked on the link and also who unsubscribed to your list. It also gives you the ability to go back and market to those who didn't open and to those who did.



The Charts show an at a glance view of the campaign results



The iContact Sent Messages detail provides specific campaign information.



The screenshot shows a table titled "iContact Sent Messages" with columns for "To", "From", "Subject", "Sent", and "Status". A red box highlights the "To" and "From" columns for the first row, which contains the values "2" and "2".

To	From	Subject	Sent	Status
2	2			R
			22 AM	R
			AM	R
			2 AM	Err

Click on the Message Subject to view error detail.



## How do I send a follow-up piece to the Campaign members?

1. Click the **Campaigns** tab in Salesforce.
2. Click on the **Campaign Name** to open.
3. Click **Targeted Send**.



### Recent Campaigns

Campaign Name	Status	State
[Redacted]		





4. Click the group from the **Send only to users who** dropdown menu.
5. Click the recipients from **the following message** dropdown menu.
6. Click next.



Send only to users who:



7. Complete the Send **iContact Message Campaign** window to send another trackable campaign to a campaign within the campaign.

