iContact for Salesforce®

User Guide

Version 2.3

Confidential

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1. Getting Started

1.1 Introduction
This document serves as 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 Salesforce's 2010 Best Mass Email App.

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.

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

1.4 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

For questions regarding billing, advanced reporting, or feature requests, please contact your dedicated iContact for Salesforce Customer Success Manager.

2. iContact for Salesforce Architecture
iContact for Salesforce is designed to be easy to use and tightly integrated with Salesforce. As such, there are four main changes to Salesforce you'll notice:
1. iContact Email Campaign –The iContact Email Campaign allows you to add/remove Campaign members, view aggregate message results and gauges

across multiple emails within the campaign, send messages, and update statistics. For EE and UE, this is a new Campaign record type. You can use iContact Email Campaign page to drill down to a specific message within that Campaign.

2. iContact Sent Message Detail Page – This page displays detailed information for one particular message. From here you can drill down to specific Campaign members to view their interactions with the message.

3. iContact Message Statistic Detail Page – This page recaps how a single Campaign member has interacted with a particular message. You can then drill down to the contact or lead's page to view their interaction across other messages.

4. Standard Salesforce Contact/Lead Page – These pages will now contain additional information regarding how your contact/lead interacted and responded to your email marketing efforts across messages and Campaigns.

3. 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 for viewing your Spam Score information and setting your product version. 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.

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

or

2. Click on **iContact Configuration** Tab

3. Click the Edit Button to edit your custom setting
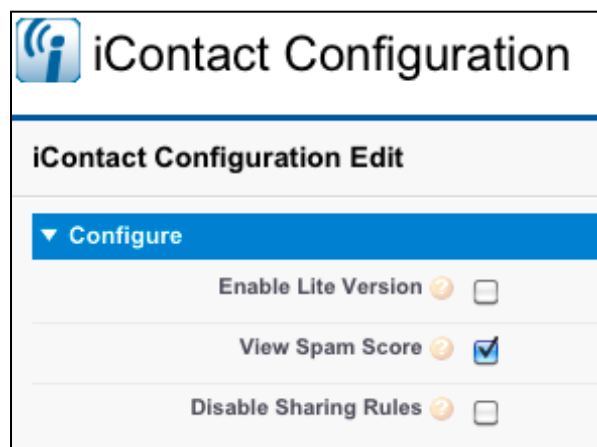
3.1 Enable Lite Version

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. For more details see section 4.5.

3.2 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. For more details see section 12.3.

3.3 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.

** Please do not make any changes to the iContact API Connection section, unless asked to by your Customer Success Manager.
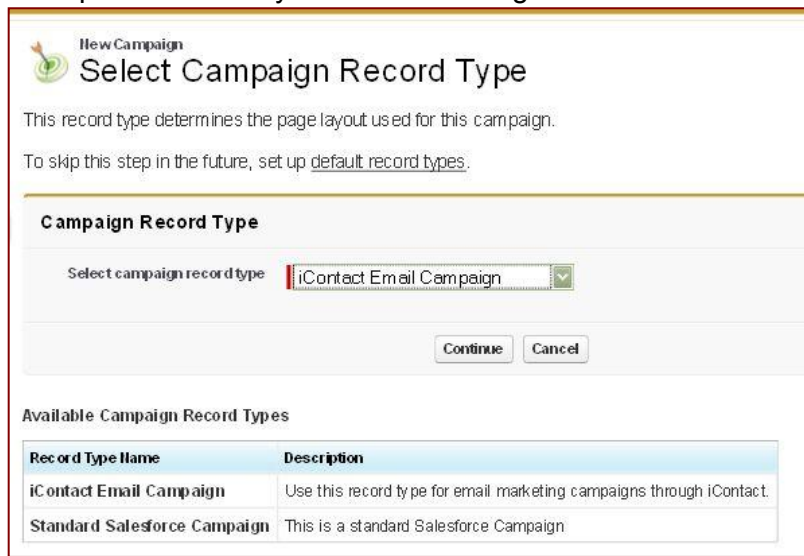
4. Getting Ready to Send

**Before any send, best practices recommend that you send your message to small set of internal users that includes you.

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 EE and UE, 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. You must have "Marketing User" permissions in your Salesforce org to be able to create a new Campaign.

2. Click **Continue**

3. Specify a name for your iContact Email Campaign
4. 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. See Section 6.3 for details.
5. Mark the Campaign as active.
6. 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   iContact Send   Targeted Send   iContact Help

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 is Released. When the message is 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.*

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. Please see section 12.2 for full details.

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" at www.icontactplus.com/salesforce to see this process performed.

Add via search
1. From the Campaign, click **Manage Members** and choose **Add Members – Search**
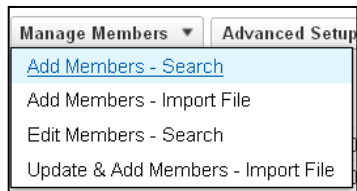
2. Select to search for Leads or Contacts
3. Use Salesforce's filter criteria to perform your search
4. Select the contacts or leads that you would like to add and click **Add with Status**, choosing the appropriate status.
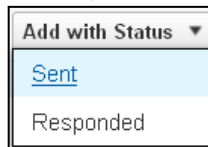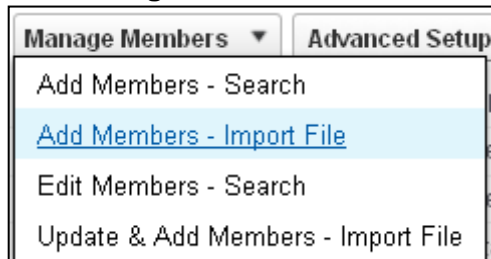

5. To search again and add more contacts or leads, click the **Add Members** tab within the **Add Members – Search** option.
6. When finished, click **Back to Campaign**.

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.

Add from Salesforce Report, or Contact/Lead 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.

Example:

4.3 Selecting Your Email Template

1. To begin the email send process, click the **iContact Send** button on your Campaign page.
   a. iContact for Salesforce leverages existing Salesforce functionality to create email templates. This means that if you already have your emails in Salesforce, there is no further work required to begin using iContact.
   b. 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."

   c. If you do not have any templates in Salesforce, you may create your messages either in Salesforce or via a third party tool and copy and paste your branded emails into Salesforce. You may use Salesforce's HTML templates, Custom templates, or plain Text messages. If using HTML or Custom templates, be sure to include a text version to be sent with the email. Please note that if you choose to send a plain text only type message, tracking information will not be available.
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.

Notes:
- Salesforce requires that your emails be less than 70kb in size.
- Make sure that any email template folder that you would like to use with iContact for Salesforce is marked as "…accessible by all Users" or is located in your "My Personal Email Templates" or "Unfiled Public Email Templates" folders.
- For more information about Salesforce email templates, please see the video tutorials entitled "Create a Template Folder", "Create a Custom Template", or "Create a Letterhead Template" at www.icontactplus.com/salesforce, or visit the Help & Training section within your Salesforce org.

  Go to **Help & Training** > Click the **Help** tab > Expand **Administration Setup** menu > Click **Managing Email Templates**

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 Create button.
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. The Can-Spam Act requires this information. For more information about the Can-Spam Act, please refer to the Glossary of this document. This information will be added to the footer of your emails by iContact. All fields are required.

| ▼ Sending Options		
From Option	New...	Create
From Name	Example Company, Inc.	
From Email	news@example.com	
Address		
Street	123 Street	
City	City	
State	ST	
Zip	11111	
Country	US	

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.
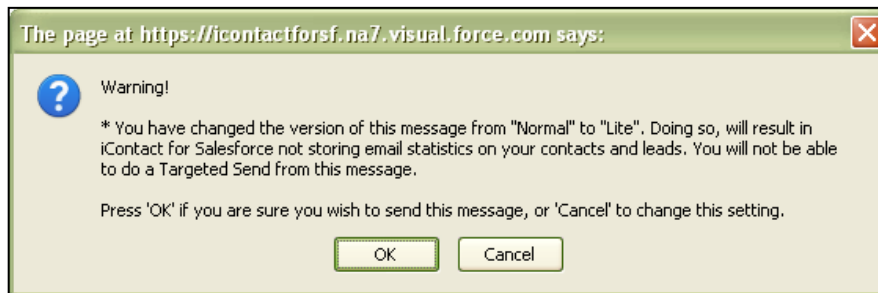
4.6 Accept Terms and Conditions

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 or your Customer Success Manager with any questions at all about this.

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.
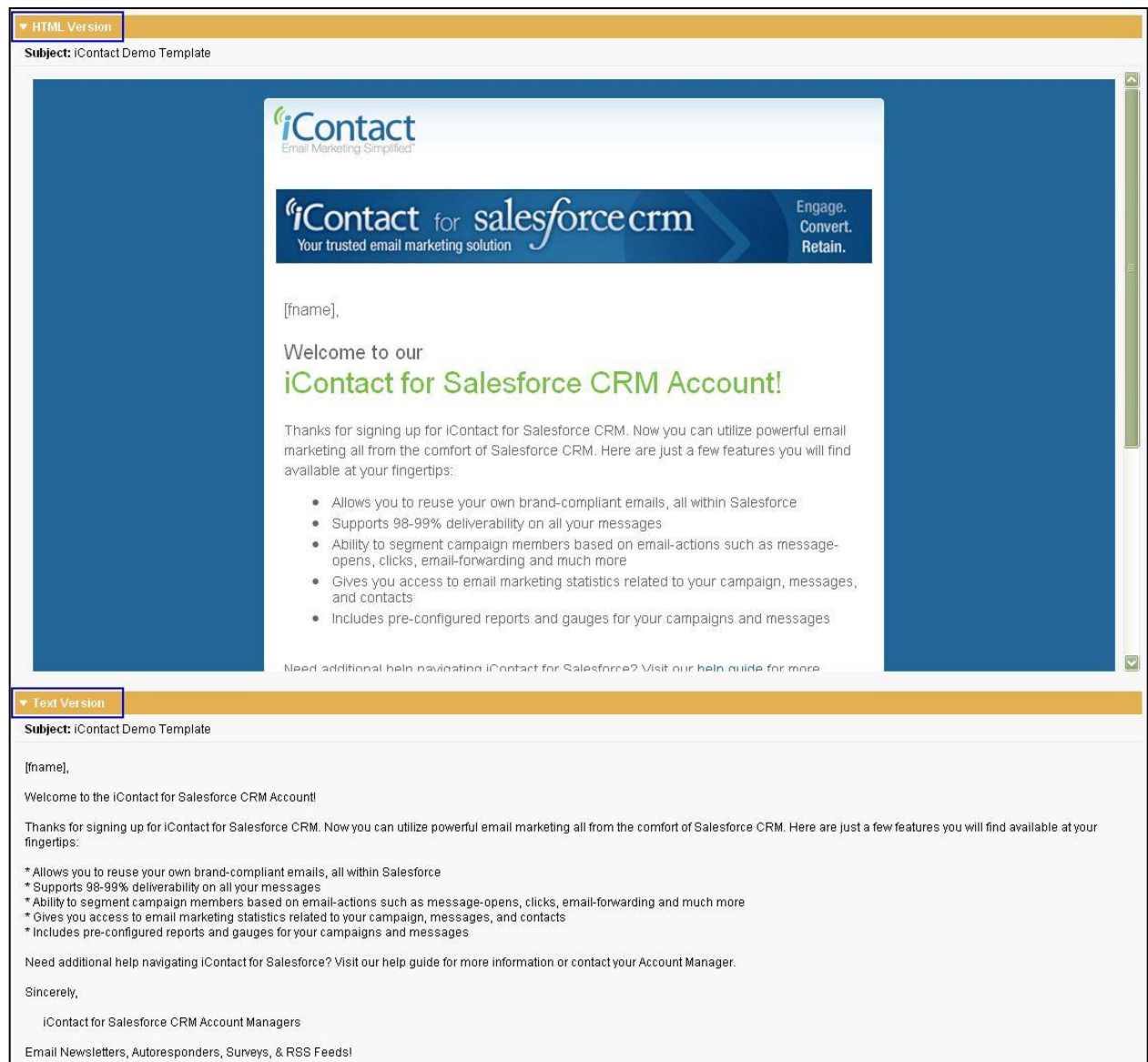
4.9 Sending Your Email

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 messages 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.
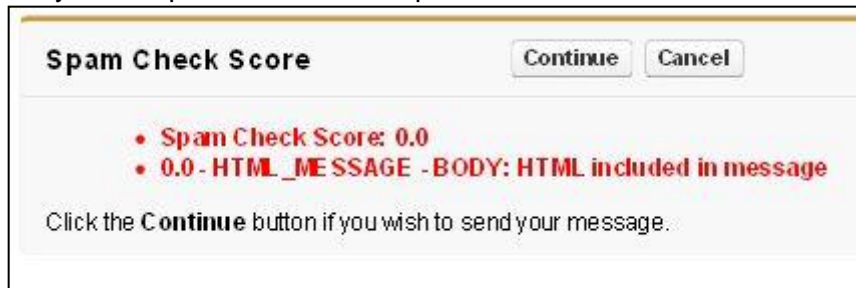
5. Viewing the Results

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 Buttons

In order to view up-to-date statistics, click the `Update Statistics` button on the Sent Message Detail page or the Campaign page.

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.

6. Campaign Level Reporting

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

6.1 Campaign Impact

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

6.2 Campaign Charts and Success Criteria

The Campaign Impact figures (section 6.1) 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.
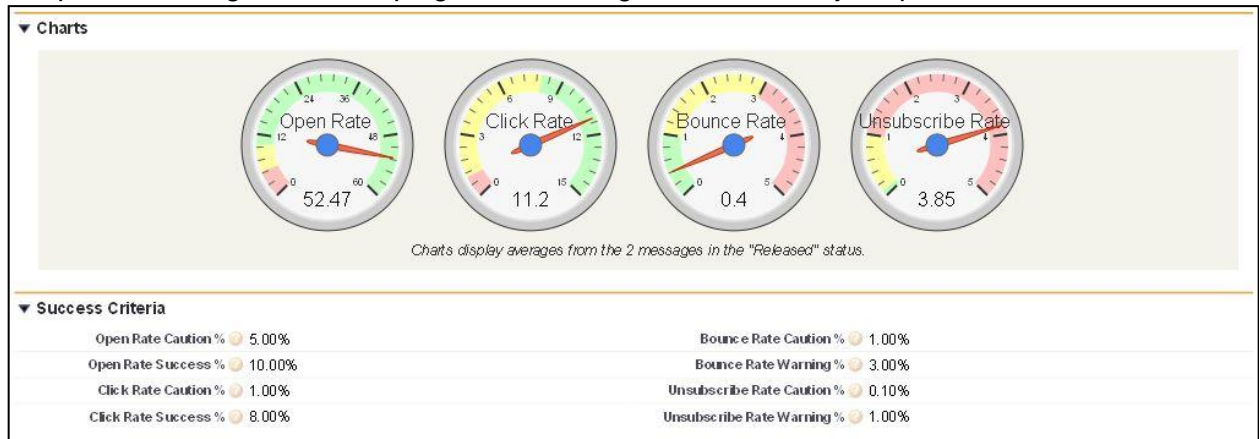
iContact has provided default ranges for the open, click, bounce, and unsubscribe rates based on general email marketing averages. Acceptable ranges for these numbers can vary for many reasons, including as industry, the Campaign, the recipients, the message, and more. The provided values are general 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.

6.2 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.

Action	Message Subject	Scheduled Time	Unique Opens	Total Opens	Unique Clicks	Total Clicks	Bounces	Delivered	Unsubscribes	Targeted
Edit | Del	Get More From Your Account! Monthly Tips Inside	3/30/2010 6:54 PM	18	38	5	8	0	26	2	✓
Edit | Del	Example Template	3/19/2010 3:46 PM	45	50	4	4	1	125	0	☐

To get more detailed message-specific reporting, click on the subject line of a message. For more details, view section 7.

7. 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
- **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 Section 7.1 for more information

7.1 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.

2. **Error – No Recipients**

a. Please add valid recipients to your Campaign.

3. Error – Invalid Credentials

a. Please resubmit your iContact User or System Admin credentials by going to the iContact Configuration tab.

4. Error – Untrusted IP

a. Please validate the trusted IP ranges set within your Setup menu.

5. Error - Unknown

a. Please contact iContact for Salesforce Support for assistance.

7.2 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. Full details in section 12.2.

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.

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. Possible statuses for your message include, but are not limited to: Scheduled, In Progress, Released, Error, and Cancelled.

▼ Message Properties			
Status	Released	Scheduled Time	3/30/2010 6:54 PM
Campaign	Sales Demo Campaign	Released Time	3/30/2010 6:56 PM
Email Template	/This Month's Newsletter Template	Last Update Date	3/31/2010 10:31 AM
Message Subject	Get More From Your Account! Monthly Tips Inside	Version	Normal

7.3 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.

▼ Message Statistics			
Delivered	26	Forwards	0
Released	26	Bounces	0
Unique Opens	18	Unsubscribes	2
Total Opens	38	Complaints	0
Unique Clicks	5		
Total Clicks	8		

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. This can be less than the number of attempted sends due to bounced emails or previously unsubscribed contacts, or contacts with a status of "invitable".

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.

Total Clicks	This reports the total number of times that all recipients have clicked on a link in your message. For instance, if 5 people click on one link and one more person clicks on 5 links, the total clicks would be 10.
Forwards	This field will not be populated by iContact and will be removed in future versions of iContact for Salesforce.
Bounces	Bounces reports the number of times the message was not successfully delivered to an email address, which is usually due to a full email inbox, a busy email server, or an invalid email address. iContact will automatically remove recipients from future sends after 5 consecutive bounced messages.
Unsubscribes	Unsubscribes reports the number of contacts who unsubscribed from this particular message.
Complaints	The number of complaints refers to the number of people who reported your message as spam or junk in their email client. The threshold of allowable number of complaints is 0.03%, or 3 spam complaints for every 1000 messages.

7.4 Spam Check and Targeted Send Information

These two sections display both the Spam Check Score and Details as well as whether or not this message was a Targeted Send, to whom it was sent, and the original targeted message. For more details regarding Spam Check Scores, please see section 12.3. For more details regarding Targeted Sends, please see section 12.2

7.5 Message Impact, Charts, and Success Criteria

Message Impact, **Charts**, and **Success Criteria** are also displayed on each sent message page. These sections will display results from that particular sent message only. Each message will inherit the success criteria settings of the Campaign from which it was sent, but may be altered individually.

The **Message Impact** section provides valuable data on how your contacts/leads have responded to your message.

The **Charts** on the iContact Sent Message Detail page display the open, click, bounce, and unsubscribe rate for that message. These gauges are meant to give an at-a-glance view of whether you are successfully reaching your Campaign members. The bar graphs below each gauge display the raw number of opens, clicks, bounces or unsubscribes. The maximum values for the bar graphs are always the number of recipients the message was sent to.

7.6 iContact Message Statistic, Clicked Links, and Targeted Sent Messages

The iContact Sent Message page also contains a view of recipients and their actions in the **iContact Message Statistic** section.

The **iContact Clicked Links** section shows a detailed view of exactly which links within your message were clicked, how many times, and when was the last click time. Click on one of the links to drill down to the iContact Click Link page.

The **Targeted Sent Messages** section will display any targeted messages that were sent from this particular message. Click on the message subject to view that Sent Message Detail.

iContact Message Statistic

Action	Recipient Name	Total Opens	Last Opened	Total Clicks	Last Clicked	Bounced Date	Unsubscribed Date	Last Modified Date
Edit	Del	John Doe	0		0		3/19/2010 3:46 PM		3/31/2010
Edit	Del	Jeff Smith	1	3/23/2010 6:24 PM	0				3/31/2010
Edit	Del	Laura Johnson	1	3/19/2010 3:50 PM	0				3/31/2010
Edit	Del	Mark Andrews	0		0				3/31/2010
Edit	Del	Larry Johnson	1	3/19/2010 3:50 PM	0				3/31/2010

Show 5 more » | Go to list (50+) »

iContact Clicked Links

Action	Link	Unique Clicks	Clicks	Last Click Time
Edit	Del	http://ncaviationeducation.aero/application.pdf	2	2	3/19/2010 3:49 PM
Edit	Del	http://ncaviationeducation.aero/introduction.pdf	1	3	3/19/2010 3:49 PM

Targeted Sent Messages

Action	Message Subject
Edit	Del	Get More From Your Account! Monthly Tips Inside

8. Contact/Lead Reporting

As long as your message was sent in Normal mode, data will be stored about how each individual contact or lead interacted with your message. You can view a quick version in the iContact Message Statistics section of the iContact Sent Message page (see section 7.6 above). By clicking on any Campaign member within this list, you can view the iContact Message Statistic Detail, which shows more specific information regarding this person's opens, clicks, etc. with this message.

From this iContact Message Statistic Detail page, you can drill down even further to the actual contact or lead page for this Campaign member.

The Contact & Lead pages now include sections that show **iContact Message Statistics** and **iContact Clicked Links**. These related lists and fields featured within them may be edited at any time in the page layout menu.

iContact Message Statistic								iContact Message Statistic Help (?)
Action	Recipient Name	iContact Sent Message	Campaign	Total Opens	Total Clicks	Bounced Date	Unsubscribed Date	Created Date
Edit | Del	Peter Ghali - iContact	Long URL HTML Version	Test Campaign	0	0			6/22/2010
Edit | Del	Peter Ghali - iContact	iContact Demo Template	Marketing Campaign	0	0			4/16/2010
Edit | Del	Peter Ghali - iContact	HTML with lots of links	Marketing Campaign	0	0			4/2/2010
Edit | Del	Peter Ghali - iContact	iContact Demo Template	Marketing Campaign	1	0			3/31/2010
Edit | Del	Peter Ghali - iContact	Spam Score 2.7	Marketing Campaign	0	0			3/24/2010

Show 4 more » | Go to list (9) »

iContact Clicked Links					iContact Clicked Links Help (?)
Action	Link	Full Link	Clicks	Unique Clicks	Created Date
Edit | Del	http://www.icontact.com/apichallenge	http://www.icontact.com/apichallenge	1	2	3/12/2010
Edit | Del	https://app.icontact.com/icp/core/registerapp	https://app.icontact.com/icp/core/registerapp	1	2	3/12/2010
Edit | Del	https://sites.secure.force.com/appexchange /content?contentid=a0K30000001jIYWEAY	https://sites.secure.force.com/appexchange /content?contentid=a0K30000001jIYWEAY	1	2	3/11/2010

The **iContact Message Statistics** section shows all the iContact email messages that the contact has received, the Campaign associated with each message, and other email marketing statistics. The image above represents a lead page, but this information is also available on the contact level. In this example above, recipient John Doe has been sent three messages from the Sales Demo Campaign, and he opened and clicked on one.

iContact for Salesforce will update the Email Opt Out field for Contacts/Leads that have unsubscribed when you click the Update Statistics button. This provides our customers with the most visibility regarding contacts or leads that have opted to no longer receive emails. If a contact or lead resubscribes to your emails, the Email Opt-out field will need to be manually updated.

Email Opt Out ✓

In addition, if you manually check the Email Opt Out box on a Contact or Lead's page, that Campaign member will not be sent a message through iContact for Salesforce.

9. iContact Campaign Email Reports

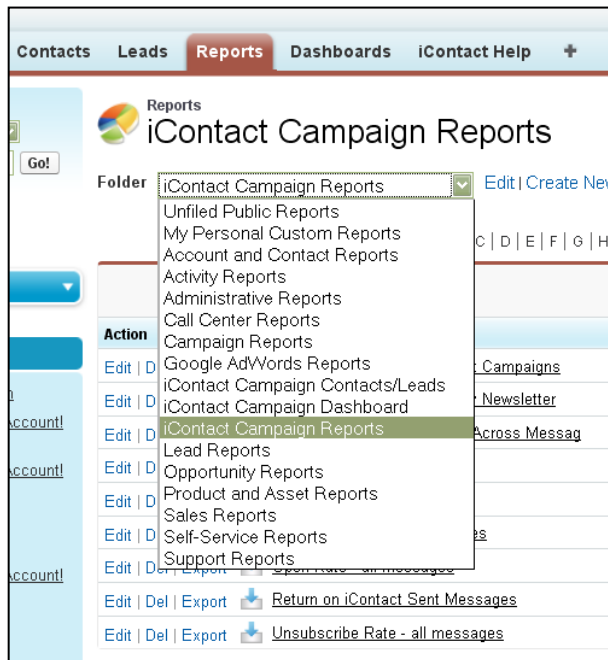**Please Update Statistics before viewing any reports for the most up to date tracking information.

iContact provides several pre-packaged reports to be used within your Campaigns. This first group of reports highlights key email statistics across all of your messages within a particular Campaign. The available reports are:

- Open Rate for All Messages
- Click Rate for All Messages
- Bounce Rate for All Messages
- Complaint Rate for All Messages
- Unsubscribe Rate for All Messages

This group of reports can be found in two places. First, they can be found in the Custom Links section of your iContact Email Campaign page.

These reports are also located in the **iContact Campaign Reports** folder in the Reports tab.

10. iContact Campaign Contact and Lead Email Reports

**Please Update Statistics before viewing any reports for the most up to date tracking information.

iContact also provides pre-packaged contact and lead email marketing reports which contain both Contact and Lead data related to who opened, clicked, bounced or unsubscribed from your iContact email marketing Campaign(s). These reports allow users to drill down to specific Campaigns, messages, or filter by any other available criteria.

The available reports are:

- iContact Campaign Contacts/Leads
- iContact Campaign Contacts/Leads Opened
- iContact Campaign Contacts/Leads Clicked
- iContact Campaign Contacts/Leads Bounced
- iContact Campaign Contacts/Leads Unsubed

These reports are located in the **iContact Campaign Contacts and Leads** Reports folder.
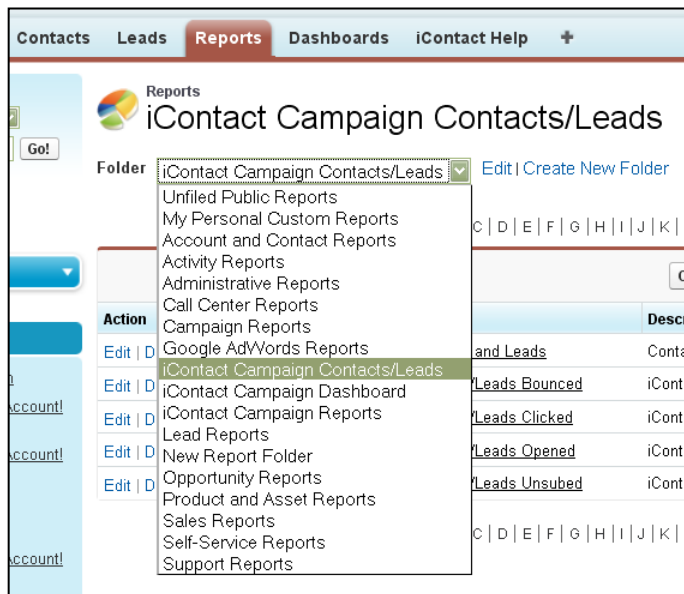
The **iContact Campaign Contacts and Leads** report displays all data from all Campaigns. You can easily narrow down the data that you view by setting Salesforce criteria. You could view data by Campaign, by certain message subjects, by date ranges, etc.

iContact Campaign Contacts / Leads Opened shows all contacts and leads who are members of your iContact Campaign(s) and opened on a Campaign message. You can edit to see a specific Campaign or message.

iContact Campaign Contacts / Leads Clicked report shows all Contacts and Leads who are members of your iContact Campaign(s) and clicked on a Campaign message. You can edit to see specific Campaign or message.

iContact Campaign Contacts / Leads Bounced report shows all contacts and leads who are members of your iContact Campaign(s) and bounced on a Campaign message. You can edit to see specific Campaign or message.

iContact Campaign Contacts / Leads Unsubscribed report shows all contacts and leads who are members of your iContact Campaign(s) and unsubscribed from a Campaign message. You can edit to see specific Campaign or message.

iContact Campaign Contacts/Leads Unsubed

Report Generation Status: Complete

Report Options:

Summarize information by:
[Campaign: Campaign Name ▾]

View
[All icontact message statistics ▾]

Time Frame

Date
[Bounced Date ▾]

Duration
[Custom ▾]

Start Date [ ]   End Date [ ]

[Run Report ▾] [Hide Details] [Customize] [Save] [Save As] [Delete] [Printable View] [Export Details]

Filtered By: Edit
Unsubscribed Date not equal to Clear

iContact Sent Message: Message Subject	Recipient Name	Contact: Email	Contact: First Name	Contact: Last Name	Contact: Account Name: Account Name	Contact: Phone	Lead: Email	Lead: First Name	Lead: Last Name	Lead: Company
Campaign: Campaign Name: Dave Dorsey Demo (5 records)										
iContact Demo Template	Darren Cook	-				-	darren.cook@douglasscientific.com	Darren	Cook	Douglas Scient
iContact Demo Template	Jorge Rivas	-				-	jrivas@arc.org	Jorge	Rivas	iContact
iContact Demo	Jorge Rivas	-				-	jrivas@arc.org	Jorge	Rivas	iContact

11. iContact Dashboard

**Please Update Statistics before viewing any reports for the most up to date tracking information.

iContact for Salesforce includes a dashboard that provides email marketing information across all Campaigns. This dashboard provides a snapshot of monthly email marketing activities.

12. Advanced Features

iContact for Salesforce has built in some fantastic advanced features to make your email marketing efforts even more meaningful and productive than ever.

12.1 Merging Fields in Your Email

iContact for Salesforce supports email template merge fields for most parameters for the Contact, Lead, Campaign, Organization, Account, and User objects. Additionally, the email templates can support most custom fields created for these objects.

You may use Salesforce's standard merge codes for any iContact supported merge field.

For some standard merge fields, iContact uses Contact and Lead information interchangeably. iContact supports the following list of Standard Contact and Lead merge fields. The merge fields for Contacts and Leads will merge data for both the contact and the lead, so you should choose either the contact or lead merge value, but not both. If you use both values, the field will merge twice.

- Salutation
- Name
- First Name
- Last Name
- Account Name / Company
- Email
- Phone
- Fax
- Mailing Address / Address

Don't use both {!Lead.FirstName} {!Contact.FirstName} as this will result in duplicate merge values for the Standard iContact fields above.

For all other merge fields, you must specify {!Contact….} or {!Lead….}. If you are sending to a Campaign that includes both Contacts and Leads, use both merge fields. The correct one for each Campaign member will be populated, and the other will be ignored.

For a full reference of supported standard email template merge fields, please read the iContact for Salesforce help article at
http://salesforce.icontact.com/email_merge_fields.

iContact for Salesforce's email templates also support most custom fields that you create for an object. To merge a custom field, place two underscores and the letter "c" after the field name. For example, {!Contact.customfield__c}

Note: We do not support date custom fields or description merge fields.

If your email contains a field that is not supported by iContact it will be highlighted in the message preview (text and HTML) as shown below:

Text Version

Subject: Case {!Case.CaseNumber}:"{!Case.Subject}" auto-assigned to you

The following case has been auto-assigned to your team. The case needs to be resolved within our standard service levels.

Company: [business]
Contact: [fname] [lname]
Subject: {!Case.Subject}
Description: {!Case.Description}

If you select a template that includes unsupported merge fields, you will receive the following error message:

Folder	iContact Templates
Template	InvalidMergeFieldTest1

⚠ Unsupported merge fields detected.

If the template includes unsupported merge fields, we recommend editing the template and changing the field values before sending.

12.2 Targeted Send

iContact for Salesforce includes an innovative and easy-to-use Targeted Send feature that allows Salesforce users to follow-up with contacts/leads. Targeted Sends can be sent from both your Campaign Page and your iContact Sent Message Page.

There are six options for a Targeted Send.. You can target only those Campaign members who:

1. Opened a particular message – Campaign and Message Targeted Sends Supported
2. Clicked a particular link or any link - Campaign and Message Targeted Sends Supported
3. Opened but did not click a message - Campaign and Message Targeted Sends Supported
4. Did not open a particular message - Campaign and Message Targeted Sends Supported
5. Have not received a message from Campaign – Campaign Only Supported
6. Were added to Campaign within a date range – Campaign Only Supported

To utilize the Targeted Send functionality, first update your message or Campaign statistics. Click the "**Targeted Send**" button on either the iContact Email Campaign page or the iContact Sent Message page.

The Targeted Send will be sent even if the recipient is no longer a Campaign member.

If a message is a Targeted Send, it is noted in two areas:

- On the Campaign page in the iContact Sent Messages section, a check mark will display beside those messages that are Targeted Sends.
- On the iContact Sent Message page, the Targeted Send section will highlight which message and what actions originated the iContact message.

It is important to note the following information about Targeted Sends:
- Because iContact has no way of tracking opens for people who have images turned off or who receive text-only versions, these people are considered Did Not Opens. Therefore, they will receive the Targeted Send. Please consider this before sending a Targeted Send to this group.
- If a targeted send is scheduled to be sent at a future date and time, the recipients of the Targeted Send are determined at the time of creation, not at the time of send. So for example, if you create a Targeted Send at 2PM for all Campaign members who opened a particular message to be sent at 4PM it will not be sent to recipients who open the email between 2PM and 4PM.
- In order to use the Targeted Send feature you must have already sent a message from your Campaign.
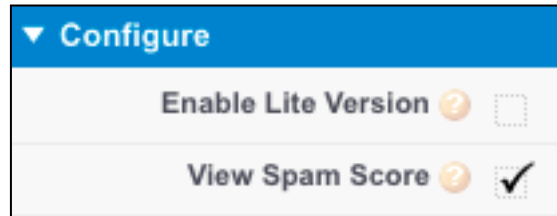
If your Targeted Send results in no recipients, a warning message will appear. For example, if you try to create a Targeted Send for everyone who opened a message but

there were no opens, iContact for Salesforce will prevent you from creating the Targeted Send.

12.3 Viewing Spam Score

The SpamCheck feature allows our customers to gauge the deliverability of their message in order to prevent spam blockers from preventing the message from reaching the inbox.
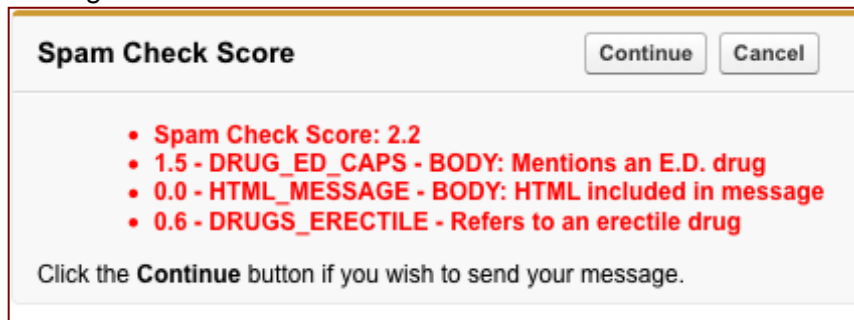
This feature is enabled In the iContact Configuration Tab, there is a configure section that allows you to change your "View Spam Score" setting. If checked, iContact for Salesforce will display the Spam Score of your message before sending and give you the option of continuing to send your email or going back to your Campaign and to edit your message.

If the "View Spam Score" Configuration is checked, you will see the following page after sending your message. This page gives you the option to continue to send your message or cancel.
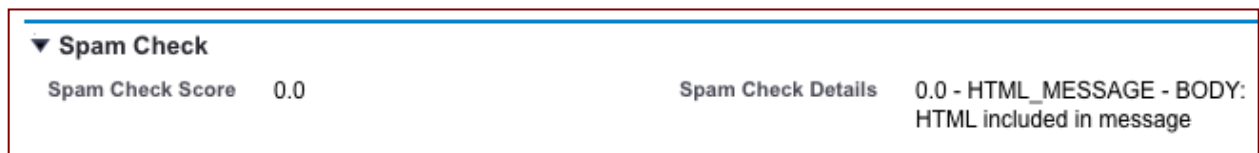
Additionally, iContact for Salesforce will store your Spam Check Score with your message for your reference. Most results are self explanatory, but to help understand codes better, please view this detailed Spam Assassin reference online: http://spamassassin.apache.org/tests_3_2_x.html

iContact for Salesforce will not allow you to send a message with Spam Check Score above 5.0.

13. Glossary

Bounce - A bounce occurs when your message cannot reach the intended recipient's inbox. Bounces can occur for any number of reasons, such as your recipient's inbox being full or your recipient's email server being temporarily down. An email will also bounce if you attempt to send to an invalid email address. The bounce rate is the ratio of the number of bounces per number of emails attempted to send. While this rate can vary for many reasons, your bounce rate should generally be lower than 20%. iContact will automatically remove recipients from future sends after 5 consecutive bounced messages.

CAN-SPAM - The CAN-SPAM Act of 2003 is a law that regulates commercial email. It protects the rights of the consumer and requires email marketers to follow its rules when sending emails. The law applies to any email whose primary purpose is advertising or promoting a commercial product or service.

The six major provisions of the Act are:
1. The email must not have misleading header information.
2. The email must not have a misleading subject line.
3. The email must come from a functioning return email address.
4. Senders must remove all unsubscribe requests within 10 business days.
5. Commercial email must display the physical postal address of the sender.
6. Any unsolicited emails must clearly identify that it's an advertising email. The recipient must have the opportunity to decline further emails.

Clicks - A click is a record of a person clicking a link that is in your message. There are several ways to look at click statistics.
- Unique clicks is how many individuals clicked on a sent message
- Total clicks reports each time someone clicks a link if they open it more than one time.
- Click rate is the number of unique clicks over the number of intended recipients.

If there are no links in the body of the message, the iContact Clicked Link Statistics will be zero.

Consider the following example; you send a message to 10 people, 5 of them click on a link in the message, and 1 of those 5 clicks on 3 different links.
- Unique clicks count would be 5
- Total clicks count would be 7
- Click rate would be 50% (5/10).

The click rate gives a rough idea of how many people are interacting with the emails you send to them, which is usually 3-12% depending on the industry.

Complaints - The number of complaints is a record of the number who reported your message as spam in their email client. Only certain email clients provide iContact with complaints, so this statistic should be considered carefully. The complaint rate is the ratio of the number of complaints per number of emails attempted to send recipients. While this rate can vary for many reasons, your complaint rate should generally be lower than 2%.

Released Messages – "Released" is the count of the number of emails that iContact attempted to send. iContact will charge you for the number of released emails.

Delivered Messages - "Delivered" is the number of emails that were successfully released. The number of delivered emails can be lower than the number released because of bounced emails, previously unsubscribed contacts, or contacts with a status of "invitable".

Opens - An open is a record of a single instance of a recipient opening your email.

There are several ways to look at open statistics:
- Unique opens counts how many individuals opened the sent message.
- Total opens counts each time someone opens a message if they open it more than one time.
- Open rate is the number of unique opens over the number of intended recipients.

Consider the following example; you send a message to 10 people, 5 of them open it, and 1 of those 5 opens the email 3 times.
- Unique opens count would be 5
- Total opens count would be 7
- Open rate would be 50% (5/10).

The open rate gives a rough idea of how many people are reading the emails you send to them, which is usually 5-20% depending on industry.

Unsubscribe - The "unsubscribe" statistic counts the number of Campaign members that have requested that they no longer receive emails from you by employing the "Manage Your Subscription" link in the email's footer. The unsubscribe rate is the ratio of unsubscribed contacts per recipients for a particular message. While this rate can vary for many reasons, your unsubscribe rate should generally be lower than 5%.