iContact for Salesforce Lightning Edition

User Guide

Exploring iContact for Salesforce Lightning v 2.3

Updated July 2022

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Welcome to iContact for Salesforce – Lightning

Important:
Getting Started Requirements

- If you have not purchased the iContact App, please contact sales@icontact.com
- You must have a Salesforce License
- You must be able to create new Campaigns
- You have Contacts and Leads with email addresses in the Standard Email field
- **Optional:** setup Custom DKIM for best results click here for a step-by-step guide

How it Works: 6 Step Overview

Step 1: Set your mailing address

Before you can send messages from iContact, you'll need to set your mailing address to comply with laws and regulations. Follow the steps here (click here) to set your mailing address.

Step 2: Create an email

Thanks to the iContact Drag and Drop email template editor, creating email has never been easier. If you already have email templates, jump ahead to creating a Campaign.

Step 3: Create a Campaign

Add contacts and leads as members of a Salesforce Campaign.

Step 4: Send an email to a Campaign

Send an email to a handful of colleagues, or to a few thousand subscribers, you start by clicking the **iContact Send - Lightning** button on a Campaign.

Step 5: Refresh Statistics

iContact captures your email statistics in real time and we bring that data into your org on demand when you click the **Refresh Statistics** button.

Step 6: Run reports on the statistics

iContact for Salesforce comes with email campaign reports and dashboards.

About The iContact for Salesforce Lightning App

The iContact for Salesforce App augments your Salesforce email capabilities. The iContact App is best used for sending email to many contacts and leads at one time. The primary features of the iContact App are;

1. Send email to Salesforce Campaign Members. (Contacts and Leads)
2. Display email results in Salesforce (email opens, link clicks, etc.)
3. Maintain a record of contacts that unsubscribe or hard bounce.
4. Email sending limits are set by your iContact subscription.
5. The iContact Lightning App is optimized for Lightning users.

Introduction to iContact for Salesforce:

Your iContact for Salesforce subscription includes the following;

1. The iContact for Salesforce App;
    a. The iContact App connects your Salesforce Org with your iContact account via an API connection. The API integration shares campaign members, email templates, and statistics between iContact and Salesforce.
2. Your iContact Account;
    a. Email templates and email design tools are included in iContact.
    b. Gathering of email statistics.
    c. Management of contacts that bounce or unsubscribe. iContact maintains a permanent record of contacts that unsubscribe or hard bounce. iContact automatically excludes these contacts from future Campaigns.

For Best Results with iContact for Salesforce:

The iContact for Salesforce App is optimized for sending an email message to large numbers of contacts, or leads. You will need to add Contacts and Leads as Campaign Members, create email templates, and send email to your Campaigns. You will perform most of your work within Salesforce, with the exception of creating email templates. Your iContact account includes designer email templates, and stock photography. The iContact email design tools enable you to send professional, and eye-catching communications.

- You have created a Test Campaign for sending test messages.
- Your Contacts and Leads have email addresses in the standard email field.
- You are able to add Campaign Members via a Salesforce report.
- Merge fields use iContact supported objects and data types.
- You have set up a custom DKIM record for iContact for best results with email delivery.

What You Need to Get Started:

1. Purchase an iContact for Salesforce subscription; (sales@icontact.com)
2. Salesforce License.
3. The iContact for Salesforce Lightning App is installed for your Org.
4. Permission Set Assigned to Users (Create and Assign iContact Permission Set).
5. iContact Campaign with Campaign Members.
6. Email Template (HTML template required for reporting opens and clicks activity).
7. We recommend setting up a custom DKIM record (optional).

About Merge Fields

Adding a merge field to your email is easy. Just copy the merge field you need and paste it into your email. **We recommend sending an email to a Test Campaign to verify your merge fields are performing correctly before sending to a Campaign.**

Data Types supported;

- Auto Number, Checkbox, Currency, Email, Geolocation, Number, Percent, Phone, Text, and URL.

Objects supported;

- Contact, Lead, Campaign, Organization, Account, and User objects.

Note;
The following are not supported:

- Formula fields
- Long Text fields
- dynamic fields

Important:
When to Use Contact or Lead Object Fields:

The Following Contact and Lead merge fields are interchangeable; use either field and the correct information will be merged into your email.

Warning:
Do not include merge fields for both the Contact and Lead Objects for the following fields. Including both fields will merge duplicate values.

- Account Name
- Address
- Company
- Email
- First Name
- Last Name
- Mailing Address
- Phone

2
Creating an Email

With the iContact Drag and Drop and HTML editor, creating email has never been easier. Choose a starting point from our professionally designed themes in the Drag and Drop editor.

Important Information

Note: Chapter 2 was written specifically to help you build an email in iContact. If you already have Salesforce email templates, feel free to skip ahead to **Chapter 3: Creating a Campaign.**

Note: Only HTML emails include a tracking pixel. Plain text emails are not able to collect statistics for email opens and link clicks.

Note: iContact email templates are optimized for sending to Campaigns.

Note: Always send your emails to a Test Campaign first.

Get started creating an email template

1. Log into your iContact account by going to https://www.icontact.com/login.
2. Click on the **Create Message** button, upper left.
3. Email options in iContact
    a. iContact Drag and Drop Editor (iContact templates)
        i. Includes tracking pixel for reporting Opens and Link Clicks.
        ii. Best choice for users who do not know how to write code.
        iii. Best design options; designer templates, stock photography, etc.
    b. HTML Editor (basic html text editor)
        i. Includes tracking pixel for reporting Opens and Link Clicks.
        ii. For users who want to edit custom HTML code.
        iii. Cannot be used as a saved template in Salesforce.
    c. Plain Text Editor (text only email)
        i. Does Not include tracking pixel. **No reporting** for Opens and Link Clicks.
        ii. Text only; no photos, formatting, etc.
        iii. Cannot be used as a saved template in Salesforce.

4. Once you have created an email in iContact using the Drag and Drop Editor, make sure to save it as a template so you can easily use it when sending through iContact for Salesforce.
5. Tutorials; follow the steps in this article (click here) or view the video tutorial here (click here) to create a message.

3
Creating a Campaign

Campaigns are the hubs for iContact for Salesforce. They're where you manage Campaign Members, send email, refresh statistics, and more.

Create a Campaign

1. Click on the **Apps** button (the square of 9 circles) in the top right and select **iContact Email Marketing - Marketing.**
2. Click on the **Campaigns** tab.
3. In the top right, click the **New** button.
4. If Salesforce asks which record type you'd like to use, select the **iContact for Salesforce Campaign Lightning** record type, then click **Next**. If Salesforce doesn't ask, skip this step.
5. Give the Campaign a name, then click **Save**.

The Campaign Name is the only required field to create and save a Campaign. There are many other fields associated with the iContact for Salesforce record type (outlined in the table below) that you can use when creating a Campaign.

Campaign page overview

If you want to get the most out of Campaigns, then it's important to understand the fields that make up standard Campaign pages.

> **Note:** If you are already familiar with Campaigns, you may wish to skip to Section 5 (Adding Campaign Members)

Salesforce Campaign fields

The following table lists Salesforce Campaign fields that are associated with the iContact for Salesforce record type. Depending on your page layout and field-level security settings, some fields may not be visible or editable. Unless otherwise noted, these fields are not accessible by iContact for Salesforce. You must update them manually.

Field	Description
Active	A checkbox to mark whether the Campaign is active or not. Unlike the Active box for emails, this box is not required by iContact for Salesforce.
Actual Cost	The amount of money spent to run the Campaign.
Budgeted Cost	The amount of money budgeted for the Campaign.
Campaign Name	The identifying name for the Campaign.
Campaign Owner	The assigned owner of the Campaign.
Campaign Record Type	The record type for the campaign. It determines the picklist values, the buttons, and the related lists available for the campaign. You should always use the 'iContact for Salesforce Campaign Lightning' record type.
Converted Leads	The number of Leads that were converted to Accounts due to the marketing efforts in the Campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. For more information about converting Leads, see Convert Qualified Leads.
Description	The description of the Campaign. Up to 32KB of data are allowed in this field. Only the first 255 characters are displayed in reports.
End Date	The ending date for the Campaign. Responses received after this date are still counted.
Expected Response (%)	The percentage of responses you expect to receive for the Campaign.

Expected Revenue	The amount of money you expect to generate from the Campaign.
Last Update Date	The date and time of the last time statistics were updated for the Campaign. This field is accessible to iContact for Salesforce and is updated automatically.
Message Statistic Count	The total number of emails with a status of “Released” that were used to calculate the Open, Click, Bounce, and Unsubscribe rate averages for the Campaign. This field is accessible to iContact for Salesforce and is updated automatically.
Num Total Opportunities	The number of Opportunities associated with the Campaign. This field is read only. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.
Num Sent	The number of individuals targeted by the Campaign.
Num Won Opportunities	The number of closed/won Opportunities associated with the Campaign. This field is read only. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.
Parent Campaign	The Campaign above the selected Campaign in the Campaign hierarchy.
Start Date	The starting date for the Campaign.
Status	The status of the campaign. The default values may be edited by an administrator.

Total Contacts	The number of individuals on Accounts who are associated with the Campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.
Total Leads	The number of Leads associated with the Campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.
Total Responses	The total number of Contacts and unconverted Leads who have a Member Status equivalent to “Responded” for the Campaign. This field is read only. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.
Total Value Opportunities	The amount of all Opportunities associated with the Campaign, including closed/won Opportunities. This field is read only. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.
Total Value Won Opportunities	The amount of all closed/won Opportunities associated with the Campaign. This field is read only. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.
Type	The type of Campaign, for example, Email or Referral Program. The default values may be edited by an administrator.

For more information about Salesforce Campaign fields, including a complete list of available fields, see Campaign Fields in the Salesforce Success Community.

iContact for Salesforce Campaign fields

The following table lists iContact Campaign fields that are associated with the iContact for Salesforce record type. When you have a better understanding of how your emails perform, feel free to update the default values set for these targets.

Field	Description
Average Bounce Rate	The average bounce rate of all emails in the Campaign with a status of Released.
Average Click Rate	The average click rate of all emails in the Campaign with a status of Released.
Average Open Rate	The average open rate of all emails in the Campaign with a status of Released.
Average Unsubscribe Rate	The average unsubscribe rate of all emails in the Campaign with a status of Released.
Bounce Rate Caution %	The first threshold where the Bounce Rate gauge transitions from green and becomes yellow. The default value is 1%.
Bounce Rate Warning %	The second threshold where the Bounce Rate gauge transitions from yellow and becomes red. The default value is 3%.
Click Rate Caution %	The first threshold where the Click Rate gauge transitions from red and becomes yellow. The default value is 1%.
Click Rate Success %	The second threshold where the Click Rate gauge transitions from yellow and becomes green. The default value is 8%.
Open Rate Caution %	The first threshold where the Open Rate gauge transitions from red and becomes yellow. The default value is 5%.

Open Rate Success %	The second threshold where the Open Rate gauge transitions from yellow and becomes green. The default value is 10%.
Unsubscribe Rate Caution %	The first threshold where the Unsubscribe Rate gauge transitions from green and becomes yellow. The default value is 0.1%.
Unsubscribe Rate Warning %	The second threshold where the Unsubscribe Rate gauge transitions from yellow and becomes red. The default value is 1%.

iContact Email Messages - Lightning related list
The iContact Email Messages - Lightning related list is where you find a list of all emails sent to your Campaign, including key email statistics data.

Column	Description
Action	Allows you to perform advanced actions on the email or to delete the record from the list.
Message Subject	Displays the subject of the email. Click this link to view the iContact Email Message detail page for the email.
Scheduled Time	The date and time the email was scheduled for release. Emails scheduled for immediate delivery record the date and time at the time of the send.
Unique Opens	A running tally of the number of subscribers who opened the email. Subscribers who open the email more than once will record just one unique open.
Total Opens	A running tally of the total number of times the email was opened.

Unique Clicks	A running tally of the number of subscribers who clicked a link in the email. Subscribers who click a link more than once or who click more than one link will record just one unique click.
Total Clicks	A running tally of the total number of times links were clicked in the email.
Delivered	The number of emails that were successfully delivered to Campaign Members. For more information about why this number may be lower than expected, see **Why doesn't iContact send email to all Campaign Members?**
Unsubscribes	A running tally of the number of subscribers who unsubscribed from the email.
Targeted	A checkbox that shows whether or not the email was a Targeted Send.
Status	Displays the status of the email: Scheduled, In Progress, Released, or Error. **Scheduled.** The email is scheduled for release. **In Progress.** The email is in the process of being released. **Released.** The email was released. **Error.** There was a problem and the email was not released.

4

Adding Campaign Members

iContact for Salesforce can send email to Contacts and Leads who are members of a Campaign.

Recommended: Before you begin, we recommend making a plan for organizing your Contacts/Leads as Campaign Members. *Depending on your Organization's needs, you may decide to create several Campaigns.* For example, you may prefer for Contacts and Leads to each have their own Campaigns.

Note: iContact requires that you add Contacts/Leads as Campaign Members. If you have questions about adding Campaign Members, we recommend reviewing Salesforce documentation for assistance.

Add Campaign Members in bulk

Use the Salesforce Data Import Wizard

Using the Data Import Wizard, you can easily upload a file containing Contact or Lead data to Salesforce and add them as members to a Campaign. For more information and steps on using the Data Import Wizard, please view this Salesforce documentation.

Run a Report of your Contacts/Leads

After running a Report, you can add the resulting Contact and Lead records as Campaign members. For more information and steps on using Reports to add Campaign members, please view this Salesforce documentation.

Add Contacts and Leads one at a time

You can also add individual Contacts and Leads to a Campaign if you want to pick your members selectively. For more information and steps on adding Contacts and Leads one at a time, please view this Salesforce documentation.

5
Sending email

Whether you're sending a test email to a handful of colleagues or a broadcast email to a few thousand subscribers, you start by clicking iContact Send - Lightning.

How to send email

1. Click on the **Apps** button (the square of 9 circles) in the top right and select **iContact Email Marketing - Lightning.**
2. Click on the **Campaigns** tab.
3. Click the Campaign you want to send an email to.
4. Click on the **iContact Send - Lightning** button, top right.
5. Select **Folder Type;**
   - **iContact Saved Templates** (templates created in iContact that you have saved)
   - **Lightning Folders** (templates created via App Launcher > Email Messages)
   - **Classic Folders** (templates created via Setup > Classic Email Messages)
6. **Select Folder**; if you selected Lightning or Classic Folders and select the name where your template is saved in.
7. **Select Template** name (your email message). Note; iContact will search your email for merge fields and attempt to validate them if any are found. For more information about using merge fields, see Merge fields. If iContact for Salesforce is unable to validate merge fields, see Unable to validate merge fields.
   - If using iContact Saved Templates, you will need to enter a Subject Line and optional Preview Text

Merge Notification	Explanation
This template has no merge fields.	It is Ok to send your email. No merge fields were found in your email.
This template's merge fields are supported.	Merge fields were found in your email and they pass validation. **Note; we recommend sending your message to a Test Campaign to confirm the correct data is merged.**

Unsupported merge fields detected. The unsupported fields have been highlighted in the preview below.	iContact for Salesforce found merge fields in your email but they do not pass validation. Do not send an email with unsupported merge fields. Verify your field name, data type, and object are supported.

8. In the **Sending Options** section, select a **From Option** (also called a Sender Property). Sender Properties are one of the many ways we keep you and your company compliant with our anti-spam policy. For more information about Sender Properties, see Sender Properties. For more information about our anti-spam policy, see the Anti-Spam Policy page on our website.
9. In the **Reply To** section, select a Reply To Option from the dropdown. The Sender Properties that you have created will be available to select from.
10. **Edit** message body for iContact saved templates as needed. Please note that these edits are not saved in the iContact template. If you edit a template, you must edit both the HTML and Text version of the email.
11. **Scheduling** section (upper right)
    - Send Immediately
    - Send Later (specify date/time below)
12. Click the **Send to Campaign Members** button at the top of the page.
13. Review the email's Spam Score, then click the **Continue button**. For more information about how spam scores are determined for your emails, see Spam check.

iContact Email Message Detail
After clicking the Continue button, you'll be directed to the iContact Email Message detail page. The iContact Email Message detail page houses myriad data for your email, ranging from release data to email statistics to the spam score.

There is also a Status field in the Message Properties section where the progress of your email is updated in real time. The table below explains the status designations.

Status	Explanation
Scheduled	iContact sends email on a first-come-first-served basis from a queue. So whether an email is to be sent immediately or scheduled for a future date and time, its status begins as Scheduled.

In Progress	When Salesforce begins transferring data from your org to iContact, the email's status will update to In Progress. If you ever need to cancel an email, you must cancel it by clicking the Cancel Send button on the iContact Email Message detail page before the status is updated to In Progress. For more information about canceling email, see **Chapter 8: Canceling email**.
Released	When iContact completes the send process, the email's status will update to Released. At that point, the Refresh Statistics button becomes active and you may refresh statistics. For more information about updating statistics, see **Chapter 9: Refresh Statistics**.
Error	Messages in Error status will never send, even when the cause of the error is resolved. You will need to fix the error and restart the sending process once it is corrected. You can check our Knowledge base for help on how to resolve the error here.

Sender Properties

A Sender Property is a sending profile that iContact adds to the footer of every email you send. Sender Properties are one of the many ways we keep you and your company compliant with our anti-spam policy. For more information about our anti-spam policy, see the Anti-Spam Policy page on our website.

Create Sender Properties in iContact

1. Log into your iContact account.
2. Click on the account dropdown in the top right and select **Settings and Billing**.
3. Click on the **Sender Property** link.
4. Click on the **Create a New Sender Property** button.
5. Complete the required fields at the top of the page and the address fields in the middle of the page, then click the **Save** button.

Create Sender Properties in Salesforce

Before sending an email to a Campaign, you may create a new Sender Property on the fly on the Send iContact Message page.

1. Click on the **Apps** button (the square of 9 circles) in the top right and select iContact Email Marketing - Lightning.
2. Click on the Campaigns tab.

3. Click the Campaign you want to send an email to.
4. Click on the **iContact Send - Lightning** button, top right.
5. In the Sending Options section, select **New** from the **From Option** or you can use the existing iContact sender property.
6. Complete the required fields of the Sending Options section with the information for the new Sender Property and click **Create**.
7. When you're ready to send the email, click the **Send to Campaign Members** button.

Caution: Login to your iContact account to create, edit, or rename your Sender Options. Login to iContact > click on the account name, upper right, Settings and Billing > Sender Properties.

The anatomy of a Sender Property

Sender Properties comprise 4 elements: the From Name, the name of the individual or organization sending the email; the From Email Address, the individual's or organization's email address; the Company, the company the individual or organization belongs to; and the Physical Address, the company's address.

Sender Property syntax
This message was sent to [recipient address] from [From Email Address]

[From Name]
[Company]
[Physical Address 1]
[Physical Address 2]

Example Sender Property for iContact for Salesforce Support
This message was sent to [recipient address] from salesforce@icontact.com

iContact for Salesforce Support
iContact

2121 RDU Center Drive
Morrisville, NC 27560

The following table maps specific iContact and iContact for Salesforce fields that populate the elements of a Sender Property:

Element	iContact	iContact for Salesforce
From Name	From Name field on the Edit A Sender Property page in your bundled iContact account.	From Name field in the Sending Options section on the Send iContact Message page.
From Email Address	From Email Address field on the Edit A Sender Property page in your bundled iContact account.	From Email field in the Sending Options section on the Send iContact Message page.
Company	Company Name field on the Edit A Sender Property page in your bundled iContact account.	Company Name field on the Edit A Sender Property page in your bundled iContact account.
Physical Address	Address fields in the CAN-SPAM Compliance Requirements section on the Edit A Sender Property page in your bundled iContact account.	Address fields in the Sending Options section on the Send iContact Message page.

Note: By default, Sender Properties format addresses according to the US format. Contact iContact for Salesforce Support if you’re not located in the US and need a format for your country.

iContact for Salesforce Support can be reached at 1 (866) 331-3208, internationally at +1 (919) 926-4234, or via email at salesforce@icontact.com. We're available Monday – Friday, 9 a.m. – 6 p.m. Eastern Time.

Spam Check

iContact is partnered with SpamAssassin, a leading anti-spam organization that vets every email sent from our platform. SpamAssassin uses a robust scoring framework to comprehensively evaluate the likelihood of your message going to spam based on your email headers, subject line, body, links, and domain.

Emails are scored on a scale from 0.0 - 8.0, with 0.0 being the best score.

If an email is rated with a 4.9 score or lower, we believe it stands a great chance of hitting your subscribers' inbox, so we'll allow you to send it. If an email is rated with a 5.0 score or higher, you must review the points counting against it and improve it before it can be sent.

You can also use third party email delivery improvement tools that evaluate your email using a suite of tests, including SpamAssassin check. For example; https://www.mail-tester.com/ will make suggestions to reduce your spam score and improve an email.

6
Scheduling Email

iContact for Salesforce gives you the flexibility to draft your emails today and send them tomorrow (or any other time that's more convenient).

How to schedule email

1. Click on the **Apps** button (the square of 9 circles) in the top right and select **iContact Email Marketing - Lightning**.
2. Click on the **Campaigns** tab.
3. Click the Campaign you want to send an email to.
4. Click on the **iContact Send - Lightning** button, top right.
5. Follow the instructions outlined in **Chapter 5: Sending email**:
    a. Select the template you want to send.

    b. Select a Sender Property.
    c. Decide whether or not you want to store email statistics for your subscribers.
6. In the Scheduling section, click **Send Later**.
7. Use the Date Field Pop-up Calendar to select the date and time of the send, then click the **Send to Campaign Members** button. The timezone for the time of send will be in the timezone set as your Salesforce user.

Cancel Send: The most important thing to know about scheduling email
If you need to make changes of any kind to the email (changing the date or time of the send, updating the subject line, fixing a typo, adding or removing Campaign Members, anything), you must first click the **Cancel Send** button on the iContact Email Message detail page.

Do not click the Delete button. Deleting an email will not cancel the email. If you do not click the Cancel Send button, the original email will be sent at the originally-scheduled date and time to the original group of Campaign Members.

This is so important, we're going to say it again.
If you need to make changes of any kind to the email (changing the date or time of the send, updating the subject line, fixing a typo, adding or removing Campaign Members, anything), you must first **click the Cancel Send button on the iContact Email Message detail page**.

Do not click the Delete button. Deleting an email will not cancel the email. If you do not click the Cancel Send button, the original email will be sent at the originally-scheduled date and time to the original group of Campaign Members.

For more information about canceling email, see **Chapter 7-: Canceling email**.

7
Edit or Canceling a Scheduled Email

There's only one way to edit or cancel an email once it is scheduled to be sent! And knowing how to do it is so important, we gave it its own chapter.

Caution: Do Not Delete a scheduled message (message status: Scheduled)
You must select **Cancel Send** and verify the message status is canceled before deleting a message.

Important!
You **should cancel** a scheduled message if;

- If you need to edit any aspect of the message.
- Need to change the scheduled time or date.
- You do not want to send the message.

How to cancel a scheduled email

1. Click the **Campaigns** tab.
2. In the section called iContact Email Messages - Lightning, click the **subject** of a scheduled message you wish to cancel.
3. Next, click on the **Cancel Send** button.
4. Watch for a notification confirming the scheduled send is canceled.

Note: if you see an error, please review the next section.

Error: This email send cannot be canceled. The email is too far along in the sending process to be canceled.

If you're unable to cancel the email, then the sending process has already begun. Follow these steps to attempt to cancel the message from your bundled iContact account.

1. Open a new web browser tab or window.
2. Login to your **iContact account** . https://www2.icontact.com/login?
3. Click **Email > Scheduled Messages >** locate the message > select **Cancel** (if available)

The most important thing to know about canceling email

If you need to cancel an email for any reason (it was scheduled with the wrong date or time, you need to update the subject line or fix a typo, you need to add or remove Campaign Members, you decided against sending the email at all, anything), you must first click the Cancel Send button on the iContact Email Message detail page. Do not click the Delete button. Deleting an email will not cancel the email. If you do not click the Cancel Send button, the original email will be sent at the originally-scheduled date and time to the original group of Campaign Members.

This is so important, we're going to say it again.

If you need to cancel an email for any reason (it was scheduled with the wrong date or time, you need to update the subject line or fix a typo, you need to add or remove Campaign Members, you decided against sending the email at all, anything), you must first click the Cancel Send button on the iContact Email Message detail page. Do not click the Delete button. Deleting an email will not cancel the email. If you do not click the Cancel Send button, the original email will be sent at the originally-scheduled date and time to the original group of Campaign Members.

Why doesn't the Delete button work?
Salesforce and iContact communicate through an API. Some of the things you do in Salesforce trigger communication through the API, things like sending email, updating statistics, and canceling email. These kinds of actions require Salesforce and iContact to work together to complete a task. Because deleting an email doesn't trigger communication through the API, iContact is left unaware of the fact that your email was deleted. So when the time comes to send the email, iContact carries out the last set of instructions it received from Salesforce: Send this email at this date and time to this group of people.

8
Refresh Email Statistics (Email Results)

iContact captures your email statistics (opens, link clicks, unsubscribes, etc.) in real time. We will automatically bring that data into your Salesforce org when you click the Refresh Statistics button. Statistics are stored and displayed in three locations inside your Salesforce account.

- Statistics will automatically refresh when you open an Email Message detail page.
- Refresh statistics at any time by selecting the **Refresh Statistics** button.

Refresh Statistics for Campaigns

The easiest way to refresh statistics for every email ever sent to a Campaign is to click the **Refresh Statistics** button on the Campaign page.

1. Click the **Campaigns tab**.
2. Click the Campaign you want to update.
3. Click the **Refresh Statistics** button, upper right side of the page.
4. When the update completes, click the **Campaigns tab**.
5. Click the Campaign you just updated then click the **Details** tab.

> **Note:** Depending on the number of emails in the Campaign, it may take several minutes to refresh statistics.

Refresh statistics for specific emails

If you're interested in the statistics for a specific email, click the Refresh Statistics button on the iContact Email Message detail page for that email.

1. Click the **Campaigns** tab.
2. Click the Campaign that contains the email you want to update.
3. In the iContact Email Messages - Lightning section, click the email you want to update.
4. Click the **Refresh Statistics** button.

9
Sending a Targeted Send

The perfect follow-up email -- one that's timely and ultra relevant to a specific subgroup of your Campaign -- is just a few clicks away.

Clicking the Targeted Send button on a Campaign lets you send a follow-up email based on criteria related to the Campaign's Campaign Members and the previous emails sent to that Campaign. Clicking the Targeted Send button on a specific email lets you send a follow-up email based on criteria that is unique to that specific email.

Send a Targeted Send to a Campaign

1. Click the **Campaigns** tab.
2. Click the Campaign you want to send a Targeted Send to.
3. Under the drop-down arrow on the top right of the page, click the **Targeted Send - Lightning** option.
4. Select your Targeted Send criteria, then click **Next**:
    a. Send only to subscribers who opened a specific email.
    b. Send only to subscribers who opened but did not click on a specific email.
    c. Send only to subscribers who did not open a specific email.
    d. Send only to subscribers who clicked a specific link in a specific email, a selection of links in the email, or any link in the email.
    e. Send only to subscribers who were added to the Campaign on or before a specific date, on or after a specific date, or between two dates.
    f. Send only to subscribers who have not received an email from the Campaign.
5. Proceed with the regular sending method. Follow the instructions outlined in **Chapter 6: Sending email:**

    - Give your browser permission to load mixed content.
    - Select the email you want to send.
    - Select a Sender Property.
    - Decide whether or not you want to store email statistics for your subscribers.
    - Decide whether to send this email immediately or to schedule it for later.
    - Click the **Send to Campaign Members** button.

Send a Targeted Send to an email

1. Click the **Campaigns tab**.
2. Click the Campaign that contains the email you want to send a Targeted Send to.
3. In the iContact Email Messages - Lightning related list, click the email you want to send a Targeted Send to.
4. Click the **Refresh Statistics** button. For more information about updating statistics, see **Chapter 9: Refresh statistics**.
5. Click the **Targeted Send - Lightning** button.
6. Select your Targeted Send criteria, then click **Next**:
    a. Send only to subscribers who opened the email.
    b. Send only to subscribers who opened but did not click on the email.
    c. Send only to subscribers who did not open the email.
    d. Send only to subscribers who clicked a specific link in the email, a selection of links in the email, or any link in the email.
7. Proceed with the regular sending method. Follow the instructions outlined in **Chapter 6: Sending email**:
    a. Give your browser permission to load mixed content.
    b. Select the email you want to send.
    c. Select a Sender Property.
    d. Decide whether or not you want to store email statistics for your subscribers.
    e. Decide to send this email immediately or to schedule it for later.
    f. Click the **Send to Campaign Members** button.

10
Running Reports

iContact for Salesforce comes preloaded with nearly two dozen reports to help you make sense of your data, track your ROI, and drive your business forward.

Run a Report

1. Refresh statistics. For more information about updating statistics, see **Chapter 9: Refresh statistics**.
2. Click the **Reports tab**.
3. Click **All Folders** and select a report from an iContact folder.

iContact reports

Running a report is as easy as clicking the report you need. This section outlines the reports and in detail so you can decide which starting point is best for you. The reports are located in **Reports > All Folders**; look for the iContact Lightning folders.

iContact Campaign Dashboard - Lightning folder

These reports show data that spans all Campaigns or all emails within your Campaigns.

- **Campaign Open Rate - Month - Lightning**
  - This report shows the open rate for all Campaigns created this month and presents them in a graph for easy comparison.(Open Rate per Campaign created this month.)
- **Campaign Sends - Month - Lightning**
  - This report shows the number of emails you sent for all Campaigns and presents them in a graph for easy comparison.(Sends for campaign for the current month.)
- **Campaign Unsub Rate - Month - Lightning**
  - This report shows the unsubscribe rate for all Campaigns created this month and presents them in a graph for easy comparison.(Unsubscribe rate per Campaign for the current month.)
- **Click Rate - This Month - Lightning**
  - This report shows the click rate across all emails and presents the data in a graph for easy comparison. You want to drive clicks and engagement as much as possible. Use this report to help identify emails and patterns that may have contributed to greater click rates.
- **Open Rate - This Month - Lightning**
  - This report shows the open rate across all emails and presents the data in a graph for easy comparison. You want to drive opens and engagement as much as possible. Use this report to help identify emails and patterns that may have contributed to greater open rates.

- **Unsub Rate - This Month - Lightning**
    - This report shows the unsubscribe rate across all emails and presents the data in a graph for easy comparison. Unsubscribes are registered when Contacts or Leads opt out from receiving your email. Use this report to help identify emails and patterns that may have contributed to higher unsubscribe rates.

iContact Campaign Members - Lightning folder

This folder contains the most frequently-used reports. The reports show data for individual Contacts and Leads.

- **iContact Campaign Bounces - Lightning**
    - This report shows the Contacts and Leads who hard bounced an email. For more information about bounces, see Bounces in the iContact Help Portal.
- **iContact Campaign Clicks - Lightning**
    - This report shows the Contacts and Leads who clicked a link within an email.
- **iContact Campaign Members - Lightning**
    - This report shows you a breakdown of all bounced, clicked, opened, and unsubscribed data. And if you ever need to create a custom report type, this is the report to work from. For more information about custom report types, see Custom Report Types.
- **iContact Campaign Opens - Lightning**
    - This report shows the Contacts and Leads who opened an email.
- **iContact Campaign Unsubs - Lightning**
    - This report shows the Contacts and Leads who unsubscribed from an email.

iContact Campaign Reports - Lightning folder

These reports show data that spans all Campaigns or all emails within your Campaigns.

- **Average Unsubscribe Rate - Lightning**
    - This report shows the average unsubscribe rate across all emails and presents the data in a graph for easy comparison. Use this report to see which emails triggered more unsubscribes than others.
- **Avg Open Rate - Newsletter - Lightning**
    - This report shows the average open rate for a demonstration Campaign called “Monthly Newsletter.” After selecting this report, click the magnifying glass to *select one of your Campaigns to report on.*
- **Bounce Rate - Lightning**
    - This report shows the bounce rate across all emails and presents the data in a graph for easy comparison. You want to keep your bounces to a minimum. Use this report to help identify emails and patterns that may have contributed to higher bounce rates.

- **Avg Click Rate - Campaigns - Lightning**
  - This report shows the average click rate across all iContact Campaigns and presents the data in a graph for easy comparison. Use this report to gauge your overall click rate success.
- **Click Rate - Lightning**
  - This report shows the click rate across all emails and presents the data in a graph for easy comparison. You want to drive clicks and engagement as much as possible. Use this report to help identify emails and patterns that may have contributed to greater click rates.(Click Rates for All iContact Email Messages in This Campaign)
- **Complaint Rate - Lightning**
  - This report shows the complaint rate across all emails and presents the data in a graph for easy comparison. Complaints are registered when Contacts or Leads mark your email as spam. Complaints are very damaging to your sending reputation and to ours, so you want to keep them to a minimum. Use this report to help identify emails and patterns that may have contributed to higher complaint rates..(Complaint Rates for All iContact Email Messages in This Campaign)
- **Open Rate - Lightning**
  - This report shows the open rate across all emails and presents the data in a graph for easy comparison. You want to drive opens and engagement as much as possible. Use this report to help identify emails and patterns that may have contributed to greater open rates.(Open Rates for All iContact Email Messages in This Campaign)
- **Return on Email Messages - Lightning**
  - This report shows the return on iContact Sent Messages across all Campaigns and presents the data in a graph for easy comparison. If you associated Opportunities with iContact Campaigns, this report would sum the value of the Opportunities you won.
- **Unsubscribe Rate - Lightning**
  - This report shows the unsubscribe rate across all emails and presents the data in a graph for easy comparison. Unsubscribes are registered when Contacts or Leads opt out from receiving your email. Use this report to help identify emails and patterns that may have contributed to higher unsubscribe rates.(Unsubscribe Rates for All iContact Email Messages in This Campaign)

Customizing reports

All iContact reports can be customized from their default settings to display exactly the data you need.

1. Click the **Reports tab**.
2. Click **All Folders** and select a report from an iContact folder.
3. For basic customizations, like summarizing information or changing the time frame of the report, use the options on the Report Results page. For advanced customizations, like adjusting filters, parameters, reporting columns, and column summaries, click the **Edit button** to access the Salesforce Report Builder.

For more information about the Salesforce Report Builder, see Customizing Reports in the Salesforce Success Community.

Custom report types

You may need to build a specific report that combines iContact Message Statistics data with other standard Salesforce fields. Because our reports, fields, and data are custom additions to your org, you must start by making a custom report type.

Clone the iContact report

1. Click **Setup > Feature Settings (under Platform Tools) > Analytics > Reports & Dashboards > Report Types**. Click the **Continue button** if necessary.
2. Click **iContact Contact & Lead Message Stats - Lightning**
3. Click the **Clone button**.
4. Give the report a new Report Type Label and Report Type Name, then click **Save**.

Add the Salesforce fields you need available to the cloned report

1. In the Fields Available For Reports section, click the **Edit Layout button**.
2. Locate the purple View section on the right side of the screen. Select **iContact Message Statistics Fields (via lookup)** from the dropdown.
3. Click **Add fields related via lookup »**.
4. Click the object link that contains the fields you need to add to the report. For example, click **Campaign »**.
5. Check the box next to each field you need to add to the report.
6. Click **Ok**.
7. Repeat Steps 3-6 as necessary for the other object links.
8. Click **Save**.

Create, customize, and run your report

1. Click the **Reports Tab > New Report button**.
2. Type the name of the report you created in the Quick Find box, select it, then click the Create button.
3. If necessary, you can customize the report further by dragging additional fields you may need from the Fields section on the left side of the screen and dropping them into the Preview section on the right.
4. Click **Save**, give the report a name, then click **Save And Run Report**.

For more information about reports and dashboards, including getting started resources, step-by-step tutorials, and advanced documentation, see Reports and Dashboards in the Salesforce Success Community.

A
About your bundled iContact account

Your bundled iContact account is the engine that drives iContact for Salesforce. It's where you build your emails, it's the platform that sends them, and it's where email statistics are collected in real time.

Your bundled iContact account is an iContact account that was uniquely configured to connect to Salesforce. When you log in, it will look exactly like a standard iContact account; however, many of the features and benefits covered in this chapter are not integrated into iContact for Salesforce. Those differences will be noted.

Features that aren't integrated into iContact for Salesforce are still functional within your bundled iContact account -- you may use them if you choose to. They just will not be available in your Salesforce org.

If there are non-integrated features you'd like to use with Salesforce, we strongly encourage you to search the Salesforce AppExchange for a solution as opposed to using iContact. Remember, the best solutions are integrated into your org.

Accessing your bundled iContact account

Access your bundled iContact account by logging in to iContact directly.

Home

The iContact Home Page is a collection of widgets that gives you a bird's eye view of the overall status of your account, your sends, and the latest updates from the iContact blog.

Account Limits

The Account Limits menu helps you gauge the number of emails you sent in the current month, the amount of space you're using in your iContact File Library, your contact count, and also has an Upgrade Your Account button.

The table below provides more information about the components of the Account Limits widget.

Section	Description
Messages Sent	The number of emails you send will be shown as a fraction of your monthly send limit. Your count resets to 0 every month on the first of the month. Unused sends do not roll over to the next month. Should you ever exceed your monthly send limit, overage charges will be billed automatically to the default card on file and your emails will be released without interruption. If your account is invoiced, overages will temporarily disable sending until the invoice is paid.
File Library	Your bundled iContact account comes with 5MB of image hosting space. If you run out of space, you may delete old images from your library, contact **iContact for Salesforce Support** and request more space (up to 25MB), or host images on a third-party site or on your website. For more information about images, see **Image Library**.
Contact Count	You can ignore this limit! iContact for Salesforce subscriptions include unlimited Contacts. The Contact Count is a running tally of the number of subscribers across all lists in your account. Because a new list is created every time you send an email using iContact for Salesforce, this number will grow quickly and it will eventually exceed your limit. This is normal and expected behavior. Because of this, the Contact Count has absolutely no bearing on your Account Health whatsoever.
Upgrade Your Account	The Upgrade Your Account button is designed for standalone iContact customers. It can’t be used to upgrade your account. If you’re interested in upgrading your account, **contact your Sales Representative.**

Get Started With iContact widget

This widget is a great resource to help you get started with your bundled iContact account. It includes links to standalone iContact video tutorials and a short Getting Started with iContact user guide. It also has a link to contact the iContact Support team.

Contacts

iContact doesn't make a distinction between Contacts and Leads. We simply refer to everyone as a 'Contact'.

Lists

The Lists page is where you can find a collection of every list associated with your account. Remember, a new list is created every time you send an email from Salesforce, so this page will grow and grow.

> **Note**: Every time you send an email using iContact for Salesforce, a new list is created in your bundled iContact account and you'll find a running tally of those lists here. iContact for Salesforce lists are designated by a special naming convention. Every list name starts with the prefix "SFDC Send" and contains the date and time of the send.

1. Login to iContact directly.
2. Click **Contacts > Lists**.

The table below provides more information about the columns on the Lists page.

Column	Description
List Name	The name of the list. All lists created from Salesforce Campaigns share the same naming structure, the "SFDC Send" prefix and the date and time of the send. You can give the lists you create in iContact any name you want.
Welcome Message	Welcome Messages are automated emails that are sent to subscribers when they join a list. iContact Welcome Messages are not integrated into iContact for Salesforce.

Contacts Subscribed	This column displays the number of subscribers on the corresponding list. Lists without subscribers will display a link to add subscribers. While it's possible to add subscribers to a list in your bundled iContact account, we strongly discourage it. Subscribers added to a list in iContact aren't associated with that list or its Campaign in Salesforce.
Visible	You may choose to hide or display lists created in iContact on your subscribers' Manage Your Subscription page. This column displays the visibility setting of the corresponding list. Because iContact for Salesforce lists are semantically named and you will eventually accumulate a lot of them, we hide them from your subscribers by default.
Manage List	The Manage List button groups various administrative actions for lists. Click the button to access the options in a drop down menu. **Edit List**. Edit the name of the list, add a description for the list, decide whether or not you'd like notifications for when subscribers are added to or removed from the list, or update the list's visibility on the Manage your Subscription page. As an iContact for Salesforce customer who builds and manages lists in Salesforce, you won't get much value out of this feature. **Add Subscribers.** Standalone iContact accounts can click this option to add subscribers to a list. As an iContact for Salesforce customer who builds and manages lists in Salesforce, you won't get much value out of this feature. For more information about adding Campaign Members to a Campaign, see Chapter 5: Adding Campaign Members. **View Subscribers.** See a detailed breakdown of the subscribers associated with the list and their subscription status.

	View List Health. See a graphical breakdown of the subscribers associated with the list, their subscription status, and the evolution of the list over recent months. Because a new list is created every time you send an email from Salesforce, you won't get much value out of this feature. **Delete List.** Delete a list from iContact. Deleting a list in iContact will not affect Salesforce Campaigns, so you won't get much value out of this feature.

Add Contacts

The Add Contacts page allows standalone iContact accounts to add subscribers to lists by uploading them from a file, by adding them one-by-one, or by copying and pasting them into their account. Because you have an iContact for Salesforce account and you manage your subscribers in Salesforce, you won't get much value out of this page.

1. Login to iContact directly .
2. Click **Contacts > Add Contacts**.

For more information about adding Campaign Members to a Campaign, **see Chapter 5: Adding Campaign Members.**

The table below provides more information about the subscription status links on the Browse Contacts page.

Link	Description
### Contacts in your account / associated with this list	When no list is selected, this is the total number of contacts in your account. When a specific list is selected, this is the total number of contacts on that list.
### Subscribed to lists / Subscribed	When no list is selected, this is the total number of unique contacts who are subscribed to lists. When a specific list is selected, this is the total number of contacts who are subscribed to that list.

### Bounced	When no list is selected, this is the total number of contacts who have registered a hard bounce. When a specific list is selected, this is the total number of contacts who were once subscribed to that list but have since registered a hard bounce. For more information about bounces, see Bounces in the iContact Help Portal.
### Do Not Contact	When no list is selected, this is the total number of contacts who have unsubscribed from your emails. When a specific list is selected, this is the total number of contacts who were once subscribed to that list but have since unsubscribed.

The Contacts Table is beneath the subscription status information. This table lists your contacts' email address, name, and the date they were added to your account. The Manage Contact button in the right column of the table links to a contact's iContact Contact Profile page and iContact Contact History page.

The Actions Table is beneath the Contacts Table. The Actions Table allows you to copy contacts from one list to another, to unsubscribe contacts from a specific list, to delete contacts from your iContact account, to export contacts from your iContact account, or to move contacts into the Do Not Contact status.

Because you have an iContact for Salesforce account, you manage your contacts in Salesforce, so you won't get much value out of copying or moving contacts in iContact.
The Unsubscribe action will unsubscribe a contact from a list and the Do Not Contact action will move a contact into the Do Not Contact status.

Search Contacts

Your bundled iContact account makes it easy to search for contacts using a variety of criteria, including email address (full or partial addresses, like salesforce@icontact.com or simply icontact.com), name, business or address information, or even custom field data.

Access the Search Contacts page:

1. Login to iContact directly.
2. Click **Contacts > Advanced Search**.

Segments

Segments were designed to give standalone iContact customers a way to drill down to specific contacts within a list so they could send them more targeted emails. Segments are not integrated into iContact for Salesforce.

Access the Segments page:

1. Login to iContact directly .
2. Click **Contacts > Segments**.

The Targeted Send feature was built for iContact for Salesforce to give you the same functionality as Segments. If you'd like to target specific contacts with more relevant follow-up messaging, use the Targeted Send feature in Salesforce, not the Segment feature in iContact. For more information about targeted sends, see **Chapter 10: Sending a Targeted Send**.

Sign-up Forms

Sign-up Forms allow standalone iContact customers to create a sign-up form for their website that funnels new contacts directly into their iContact account.

Note; iContact Sign-up Forms are not integrated into iContact for Salesforce.

Access the Sign-up Forms page:

1. Login to iContact directly .
2. Click **Contacts > Sign-up Forms**.

Note; the Web-To-Lead form is a Salesforce tool that gives you the same functionality as Sign-up Forms. If you'd like to build a sign-up form for your website, use the Web-To-Lead feature in Salesforce, not the Sign-up Form feature in iContact.

Build a Web-To-Lead form

1. Click **Setup > Customize (under Build) > Leads > Web-To-Lead**.
2. Click the **Edit button**.
3. Check the **Web-To-Lead Enabled box** to enable your org to receive online leads, select your Default Response Template by clicking the **magnifying glass icon** in that section and choosing the Welcome Email you built in iContact, then click **Save**.
4. Click the Create Web-To-Lead Form button.
5. Build your form by adding or removing fields from the **Available Fields and Selected Fields** sections.

Note: At a minimum, you must include the Email field for iContact for Salesforce and the Last Name and Company fields for Salesforce. You may reorder fields by moving them up or down in the Selected Fields list.

6. Paste the URL for your Thank You page in the **Return URL box**, then click **Generate.**
7. Copy your form's HTML and partner with your webmaster to paste it on your website, then click **Finished**.

Email

The most-frequently visited tab by iContact for Salesforce customers, the Email tab is where you build new emails, where you manage images stored in iContact, and where you can monitor the progress of an email or cancel an email in a pinch.

Access the Email page:

1. Login to iContact directly.

At the top of the Email page, there are three tabs.

1. **Email** (Draft messages that have not been sent)
2. **Scheduled** (Messages scheduled to send)
3. **Sent** (messages that have finished sending to your recipients)

The Drafts page stores all draft (unsent emails you save), the Draft section also retains a copy of every email sent from Salesforce. These copies are saved largely for your convenience. They can be copied, edited, or deleted as you see fit.

Scheduled Messages

The Pending Messages page is where you'll find a list of all emails that are queued up on your outgoing mail server.

Access the Scheduled Messages page:

1. Login to iContact directly.
2. Click **Email > Scheduled**

Emails that are sent with an immediate release time appear on this page as soon as your Campaign Member list uploads from Salesforce. **Emails that are scheduled for a future date and time appear on this page roughly 2 hours before the scheduled release time**.

If you ever need to cancel an email and you're unable to cancel it in Salesforce by clicking the Cancel Send button, you may be able to cancel it on the Pending Messages page in iContact. For more information about canceling email, see **Chapter 8: Canceling email**.

Automation

Automated message features enable iContact customers to schedule and automate a series of emails at specified intervals.

Note: Automated messages are not integrated into iContact for Salesforce at this time.

The Scheduled Send feature can be employed if you'd like to send Campaign Members emails at specified intervals. For more information about scheduled sends, see **Chapter 7: Scheduling email**.

File Library

Your bundled iContact account comes with a 5MB image library (upgradeable to a maximum of 25MB) for images you want to include in your emails.

Access the Image Library page:

1. Login to iContact directly.
2. Click **File Library**.

In an effort to help you optimize your images for a swift delivery and small footprint in the inbox, images uploaded to the image library may not exceed 200KB in size.

Should you ever need to include an image with a larger file size, we suggest hosting the file in Salesforce, hosting the file on your website, or hosting the file on a third-party hosting service and using the image's public URL to insert the image into a message.

Reports

While you should always refresh statistics in Salesforce to get the most out of the iContact for Salesforce integration, your stats are always available in your bundled iContact account. For more information about seeing email statistics in Salesforce, see **Chapter 9: Refresh statistics**.

Most Recent Sent Message

This is a shortcut to the Sent Email Reports page for the last email you sent.

1. Login to iContact directly.
2. The home page Dashboard **displays the most recently sent messages**.

See more information about message reports here.

Sent Messages

The Sent Messages page contains a permanent record of every email that was sent from your account, the Sender Property associated with the emails, the date the emails were sent, and the number of subscribers who received them.

Access the Sent Messages page:

1. Login to iContact directly.
2. Click **Email > Sent**

Automation

The Automated messages page under the Email > Sent tab allows standalone iContact customers to track the email statistics for their autoresponders.

Note: Autoresponders are not integrated into iContact for Salesforce. If you'd like to send Campaign Members a series of emails at specified intervals, use the Scheduled Send feature in Salesforce. For more information about scheduled sends, see Chapter 7: Scheduling email.

Reporting Dashboard

The Sent Messages Dashboard allows standalone iContact customers to review their email statistics with more detailed charts and graphs.

Access the Tracking Dashboard:

1. Login to iContact directly.
2. Click **Email > Sent > Dashboard**.

iContact for Salesforce customers can always review their email statistics on the iContact Tracking Dashboard, but to get the most out of iContact for Salesforce, it's best to Refresh statistics in Salesforce and to review them there. For more information about seeing email statistics in Salesforce, see **Chapter 9: Updating statistics**.

Account Settings

The administrative settings for your bundled iContact account are organized in the account drop down in the upper right corner of iContact. The account drop down usually shows the name of the iContact Account Administrator, but it may display someone else's name. The iContact Account Administrator is the only individual who may authorize account upgrades, downgrades, and cancellations. This individual receives password reset links and other administrative emails from iContact.

User Settings

The User Settings page displays your username and usually displays the name of the Account Administrator, but it may display someone else’s name.

Access the User Settings page:

1. Login to iContact directly .
2. Click **Account name drop down > Settings and Billing > User Settings**. The Account drop down displays your name or a colleague’s name.

You may also update your iContact account password on this page.

Contact Information
This page contains the contact information of the iContact Account Administrator and will always display his or her name. The information on this page can not be changed without the iContact account password.

Access the Contact Information page:

1. Login to iContact directly .
2. Click **Account name drop down > Settings and Bulling > Contact Information**. The Account drop down displays your name or a colleague's name.

Billing Information
This page contains the billing information for your account.

Access the Billing Information page:

1. Login to iContact directly .
2. Click **Account name drop down > Settings and Billing > Billing Information**. The Account drop down displays your name or a colleague's name.

Invoices And Receipts
This page contains a list of every invoice and receipt that is generated for your account.

Access the Invoices And Receipts page:

1. Login to iContact directly .
2. Click **Account drop name down > Settings and Billing > Invoices And Receipts**. The Account drop down displays your name or a colleague's name.

Social Media Settings
This page is where you enable or disable your Facebook and Twitter accounts, as well as your Social Media Sharebar.

1. Login to iContact directly .
2. Click **Account name drop down > Settings and Billing > Social Media Settings**. The Account drop down displays your name or a colleague's name.

Sender Properties
This page contains a permanent record of every Sender Property that is created for your account. We use Sender Properties to help you remain compliant with our anti-spam policy .

Access the Sender Properties page:

1. Login to iContact directly .
2. Click **Account name drop down > Settings and Billing > Sender Properties**. The Account drop down displays your name or a colleague's name.

For more information about Sender Properties, see Sender Properties.

Custom Fields

This page stores a list of all custom fields and merge fields that have been used to merge data into an email.

Access the Custom Fields page:

1. Click **Account name drop down > Settings and Billing > Custom Fields**. The Account drop down displays your name or a colleague's name.
2. For more information about merge fields, see **Merge fields**.

Upgrade

This page allows standalone iContact customers to upgrade their accounts, but it can not be used to upgrade your account.

When you're ready to upgrade, please reach out to our Sales team. iContact Sales can be reached at 1 (877) 820-7837, internationally at +1 (919) 957-6150, or by email at **sales@icontact.com**. iContact Sales hours are Monday - Friday, 9 a.m. - 6 p.m. EST.

Setup Custom DKIM for Email Delivery Best Results

iContact automatically DKIM signs your messages using one of our shared domains. However, you can improve your results if you set up custom DKIM for email sent by iContact. Click here for a step-by-step guide for setting up custom DKIM in your account

- You need to own a domain. For example; your-business.com, adoptapet.com, etc.
- The process takes about 15 minutes.
- There is no cost for setting up custom DKIM.

Warning: Once an email is released from iContact, we have absolutely no control over it whatsoever. Our Deliverability team does everything they can to maintain a high inbox deliverability rating -- including managing DKIM, maintaining a good sending reputation with leading Email Service Providers, and policing our sending IPs for malicious senders

Whitelist the following iContact domains

- app.icontact.com
- icontact.com
- icpbounce.com
- icptrack.com
- staticapp.icpsc.com

B
Frequently-asked questions

Can I embed video in my email?
No. However, the iContact Drag and Drop Editor does offer video preview blocks that link to a video. When your recipient clicks on the video preview, your video will open and play in their web browser. We can display a preview of videos hosted on Vimeo and YouTube. Why do we not offer embedded video? iContact for Salesforce was optimized for maximum compatibility across a wide range of inboxes and many popular inboxes still don't support embedded video in emails, so neither does iContact for Salesforce. Instead, we recommend hosting the video somewhere online and linking to it using its thumbnail image.

Can I send attachments?
No. Even though it's possible to attach a file to a template in Salesforce, iContact for Salesforce will not send the file with your email. Incoming mail filters tend to strip away attachments from bulk emails and flag the emails as spam. The best alternative is to host the file on your website and to link to it in your email.

How frequently should I refresh statistics?
Generally speaking, email has a 3-7 day lifecycle. That, of course, is influenced by your industry and the engagement level of your subscribers.

If your industry never sleeps and your subscribers are very engaged with your content, we recommend updating statistics after the first hour, after the first day, and after the third day. On the other hand, if your industry and subscribers move at a slower pace, we recommend updating statistics after the first day, after the third day, and after the seventh day.

Some of my subscribers opened and clicked a lot. Is the tracking broken?
No. When you see an unreasonably high number of opens or clicks, it's usually an indicator that the subscriber forwarded the email to his or her network or of anti-virus software that's vetting your email before your subscriber gets to it.
It's not possible for us to know who your subscribers may forward an email to, so all subsequent opens and clicks will be logged under the original recipient's email address.
In the seconds it takes an email or webpage to load after we click it, anti-virus software can review our actions dozens of times in the background to make sure everything is safe. If it's opening the email or clicking links, those opens and clicks are recorded by our system.
Because forwarded emails and anti-virus software artificially inflate your open and click totals, we include Unique Opens and Unique Clicks as a part of your email statistics.

Why doesn't iContact send email to all Campaign Members?
iContact maintains a large database of email addresses and their deliverability status. The database is aggregated from the sends of every customer we serve. We run lists through this database and clean them up before we send email. We remove duplicated, bounced, unsubscribed, and otherwise undeliverable email addresses from your Campaign lists.

Below are some of the most common reasons why we remove addresses from your Campaign lists:

- Salesforce allows you to add Contacts or Leads to a Campaign whether they have an email address or not; iContact can not deliver an email without an email address.
- Salesforce allows you to add duplicate Contacts or Leads to a Campaign; iContact will deliver 1 email to each email address – no duplicate email addresses are permitted.
- Salesforce allows you to add unique Contacts or Leads who share the same email address to a Campaign; again, iContact will deliver 1 email to each email address – no duplicate email addresses are permitted.
- Salesforce allows you to add Contacts or Leads to a Campaign even if they unsubscribed from your lists in the past; iContact will not deliver email to an unsubscribed address.
- Salesforce allows you to add Contacts or Leads to a Campaign with a bounced, invalid, or otherwise undeliverable email address; iContact will not deliver email to a bounced, invalid, or otherwise undeliverable email address.
- Salesforce allows you to add Contacts or Leads to a Campaign with a role email address (for example, admin@, marketing@, support@, etc.); iContact will not deliver email to role email addresses. Click here for a list of role email addresses iContact does not deliver to.

Keep in mind that when someone bounces or unsubscribes, they aren't automatically removed from your Campaigns because Salesforce doesn't know that you're using the Campaign for email marketing. As far as Salesforce is concerned, you could be using the Campaign for direct mail marketing, telemarketing, or anything else.

Given the way we prepare lists for delivery, it is perfectly normal for the number of Campaign Members and the number of delivered emails to differ. Before any send, we recommend refreshing statistics to be sure you have the most up-to-date Campaign Member information as possible. It is also a good idea to clean up your Campaigns and remove bounced and unsubscribed Campaign Members from time to time. But don't go overboard: email is a real time technology and it may prove difficult to reconcile those numbers perfectly.

For more information about updating statistics, **see Chapter 9: Updating Statistics.** For more information about removing bounced or unsubscribed email addresses, see **Remove bounced or unsubscribed email addresses from a Campaign.**

Why is there “No Info” for so many people?
Recipients who don’t bounce an email or open an email will be recorded as “No Info” because there is no information for us to report on. iContact tracks an open when a subscriber downloads our tracking pixel or clicks a link.

Many inboxes are configured to download and display images by default -- our tracking pixel is downloaded with those images -- but not every inbox is configured this way. It’s also possible for the subscriber or the subscriber’s admin to turn off images entirely and for an admin to mute a server from relaying back to us that an email was opened.

The best way to reduce the number of “No Info” recipients is to write engaging content, to include images that enhance your content, and to encourage your subscribers to click your Call To Action link.

C
Tutorials

We want to empower you to unleash the full potential of iContact for Salesforce. Once you've mastered the fundamentals, try your hand at these tutorials.

iContact for Salesforce is a powerful and flexible email marketing solution that grows with you. In this chapter you'll learn advanced reporting skills, how to manage Campaign Members like a pro, how to use dynamic merge fields, and so much more.

Add additional fields to the iContact related lists

Adding additional fields to the iContact related lists lets you see more information in the context of your email marketing stats. For example, adding a contact's Account Name field lets you see at a glance how contacts at a specific company interact with your email.

This tutorial outlines the steps to add a contact's Account Name field to the iContact Message Statistic related list. These steps can be followed to add myriad other fields to other lists too.

Make the field you want to add to the list available

1. Click **Setup > Setup Home > Objects and Fields (under Platform Tools) > Object Manager > iContact Message Statistic - Lightning.**
2. In the Fields & Relationships section, click the New button.
3. Select the **Formula data** type, then click **Next**.
4. Type **Account Name** in the Field Label box, select the **Text formula return type**, then click **Next**.
5. Click the **Advanced Formula tab > Insert Field button**. iContact Message Statistic - Lightning should be highlighted in the window that pops up.
6. In the second column, click **Contact >**; in the third column, click **Account >**; in the fourth column, click Account Name, then scroll to the right and click the Insert button.
7. In the Blank Field Handling section at the bottom of the page, select **Treat blank fields as blanks**, then click **Next**.
8. If you're using Enterprise Edition or Unlimited Edition, decide which profiles will see the field, then click **Next**. Professional Edition doesn't support profiles, so if you're using Professional, you can skip this step.
9. Confirm the iContact Message Statistic - Lightning Layout is checked, then click **Save**.

Add the field to the list

1. Click **Setup > Setup Home > Objects and Fields (under Platform Tools) > Object Manager > iContact Email Message - Lightning**.
2. In the Page Layouts section, click **iContact Sent Message layout**.
3. Locate the iContact Message Statistic related list and click the **wrench icon**.

4. Select **Account Name** in the Available Fields section and add it to the Selected Fields section, then click **Ok**.
5. In the silver and gray box at the top of the page, click the **Save button**.

Create an iContact for Salesforce Permission Set

We recommend creating an iContact for Salesforce Permission Set lets you assign iContact for Salesforce permissions to new Users efficiently without making changes to their profile.

> **Note:** Permission Sets will resolve most Field and Object Accessibility Errors
> Visit the iContact Help Portal for steps to Create the iContact for Salesforce Permission Set and assign the iContact for Salesforce app to User Profiles. Click here to go to the Help Portal

Merge fields

Merge fields make it easy for you to dynamically customize an email for each individual in a Campaign. For example, you can greet your subscribers by name, sign an email with the name of a Contact’s or Lead’s Owner, or even remind someone of an outstanding balance due on their account and the amount of that balance.

> **Note:** If you need help resolving an “Unable to validate merge fields” error, see Unable to validate merge fields.

> **Warning:** Never send an email that contains merge fields without first confirming they work. Always test emails that contain merge fields by sending a test email to your iContact for Salesforce Test Campaign.

Supported iContact merge fields

iContact for Salesforce supports all iContact merge fields that have an equivalent Salesforce field. The table below outlines the supported iContact merge fields.

iContact field	Salesforce Contact field	Salesforce Lead field
[address1]	{!Contact.MailingStreet}	{!Lead.Street}
[address2]	**NOT SUPPORTED**	**NOT SUPPORTED**
[business]	**NOT SUPPORTED**	{!Lead.Company}
[city]	{!Contact.MailingCity}	{!Lead.City}
[email]	{!Contact.Email}	{!Lead.Email}
[fax]	{!Contact.Fax}	{!Lead.Fax}
[fname]	{!Contact.FirstName}	{!Lead.FirstName}
[lname]	{!Contact.LastName}	{!Lead.LastName}
[phone]	{!Contact.Phone}	{!Lead.Phone}
[prefix]	{!Contact.Salutation}	{!Lead.Salutation}
[state]	{!Contact.MailingState}	{!Lead.State}
[suffix]	**NOT SUPPORTED**	**NOT SUPPORTED**
[zip]	{!Contact.MailingPostalCode}	{!Lead.PostalCode}

iContact for Salesforce supports standard and custom Salesforce fields that use specific standard Salesforce objects and specific field data types. The table below outlines the supported Salesforce objects and field data types.

Supported standard objects	Supported field data types
Contact	Auto Number
Lead	Checkbox

Campaign	Currency
Organization	Email
Account	Geolocation
User	Number
	Percent
	Phone
	Text
	URL

Before using merge fields
There are three important checks to make before using merge fields.

1. **Determine if your Campaign contains only Contacts or Leads or if it contains both Contacts and Leads.** If the Campaign contains only Contacts or Leads, use merge fields built with the Contact or Lead object, respectively. If the Campaign contains both Contacts and Leads and you're merging a field that has an iContact merge field equivalent, then use the iContact merge field. If your Campaign contains both Contacts and Leads and you use both a Contact and Lead merge field, then you will merge the data twice. Using the iContact merge field ensures the data is merged just once.
2. **Confirm your Contacts and Leads have data in the fields you're merging.** If there's no data to merge, then iContact for Salesforce will merge a blank space in the email.
3. **Confirm the data is correct.** iContact for Salesforce will merge the data you tell it to. If the data is wrong, then it will merge the wrong data.

Note: If you're sending an email that contains iContact merge fields, you will see a notification on the iContact Send Message page that says, "This template has no merge fields." This notification is a false negative and it's something our developers will address in a future release of iContact for Salesforce. Despite the notification, you can confirm iContact merge fields by sending an email to your iContact for Salesforce Test Campaign.

Run a report on Campaign Members

Running a report on Campaign Members is often the first step in advanced Campaign Member management. In addition to seeing which Contacts and Leads are members of a specific Campaign, you could run this report with the Member First Associated Date field to see when Contacts or Leads were first added to the Campaign, with the Total Value Opportunities field to measure the value of the opportunities associated with the Campaign, and so much more.

1. Click the **Reports tab > New Report button**.
2. Open the **Campaigns folder > Campaigns With Campaign Members > Create button**.
3. In the Filters section, change the Show drop down to **Select A Campaign**.
4. Click the **Magnifying Glass** icon and click the Campaign you're interested in.
5. Click the **Save** button, give the report a name, then click the **Save And Run Report** button.

Run a report on Contacts and Leads who never clicked a link

Run this report to target the Contacts or Leads who never clicked a link. You can add them to a re-engagement Campaign, get them to click through to your website, and convert.

1. Refresh statistics. For more information about updating statistics, see **Chapter 9: Refresh statistics**.
2. Click the **Reports tab**.
3. Click **All Folders > iContact Campaign Contacts / Leads > iContact Campaign Contacts / Leads Clicked**.
4. Click the **Edit button**.
5. In the Filters section, hover over the Last Clicked not equal to "" filter, and click **Edit**.
6. Change the operator to **Equals**, then click **Ok**.
7. In the Quick Find box in the Fields section on the left, type **Created Date**.
8. Drag the **Created Date field** listed under the iContact Message Statistics folder and drop it into the Preview section on the right.
9. Click the **Save As** button, give the report a name, then click **Save And Run Report**.

Run a report on Contacts and Leads who never opened an email

Run this report to target the Contacts or Leads who never opened an email. You can add them to a re-engagement Campaign, get them to open and click through to your website, and convert.

1. Refresh statistics. For more information about updating statistics, see **Chapter 9: Refresh statistics**.
2. Click the **Reports tab**.
3. Click All **Folders > iContact Campaign Contacts / Leads > iContact Campaign Contacts / Leads Opened**.
4. Click the **Edit button**.
5. In the Filters section, hover over the Last Opened not equal to "" filter, and click **Edit**.

6. Change the operator to **Equals**, then click **Ok**.
7. In the Quick Find box in the Fields section on the left, type **Created Date**.
8. Drag the **Created Date field** listed under the iContact Message Statistics folder and drop it into the Preview section on the right.
9. Click the **Save As** button, give the report a name, then click **Save And Run Report**.

Run a report on Converted Leads

If you work with Leads, running this report will show you the number of Leads that were converted to Accounts due to your email marketing efforts.
Refresh statistics. For more information about updating statistics, see C**hapter 9: Refresh statistics.**

1. Click the **Reports Tab > New Report button**.
2. Click **Campaigns > Campaigns with Leads and Converted Lead Information > Create button**.
3. In the Filter section, change the Show drop down to **All Campaigns**.
4. Click the **Add button**.
5. Change the Campaign Name drop down to **Converted** (in the Lead: General section).
6. Set the operator to **Equals**.
7. Click the **Magnifying Glass** icon and click **True > Insert Selected > Ok**.
8. Drag the **Primary Campaign Source field** from the Fields section on the left and drop it into the Preview section on the right.
9. Click the **Save** button, give the report a name, then click the **Save And Run Report** button.

Run a report on iContact Sent Message Statistics

Running a report on iContact Sent Message Statistics gives you Campaign-level reporting with iContact for Salesforce data. Start by clicking Refresh statistics. For more information about updating statistics, see **Chapter 9: Updating statistics**.

1. Click **Setup > Setup Home > Apps (under Platform Tools) > Analytics > Reports & Dashboards > Report Types**. Click the **Continue button** if necessary.
2. Click the **Campaigns with iContact Sent Messages with iContact Message Statistics label.**
3. Click the **Clone button**.
4. Give the report a new Report Type Label and Report Type Name, then click **Save**.
5. In the Object Relationships section, click the **Edit button**.
6. Click **(Click to relate another object)** and select **iContact Clicked Links** from the drop down, then click **Save**.
7. Click the **Reports tab > New Report button**.
8. Open the **Campaigns folder > Click the report type you created > Create button**.
9. In the Filters section, click the **Magnifying Glass** icon and select the Campaign you're interested in.

10. Drag the fields you need from the Fields section on the left and drop them into the Preview section on the right.
11. Click the **Save** button**,** give the report a name, then click the **Save And Run Report** button.

Run a report on opens sorted by email subject

If you send multiple emails to Campaigns, you can use this report to see which Contacts or Leads opened a specific email in a Campaign.

1. Refresh statistics. For more information about updating statistics, see **Chapter 9: Refresh statistics**.
2. Click the **Reports tab**.
3. Click **All Folders > iContact Campaign Contacts / Leads > iContact Campaign Contacts / Leads Opened**.
4. Click the **Edit button**.
5. In the Filters section, click the **triangle** on the Add button and select **Field Filter**.
6. Type Subject in the first drop down and click **iContact Sent Message: Message Subject** (under iContact Message Statistics).
7. Change the operator to **Equals**.
8. Type the subject of the email you’re interested in into the text field, then click **Ok**.
9. Click the **Save** button, give the report a name, then click the **Save And Run Report** button.

D
Errors

Sooner or later you'll encounter an error, but many errors can be resolved quickly and easily. This chapter outlines the most common errors and clear and simple steps to resolve them.

Most iContact for Salesforce errors are password-related, caused by routine password changes in Salesforce or by changing the bundled iContact account password without also changing the iContact API password. Other common errors are caused by setting up the wrong iContact Configuration page, by missing steps in the Installation Guide, and by poorly-formatted HTML.

In almost all cases errors are straightforward and easy to resolve.

The most important thing to know about errors is they stop the sending process. Which is to say, if you receive an error, your email will not be sent. Once the error is resolved, you must start the sending process again from the beginning.

Attempt to de-reference a null object

> **Error:** Attempt to de-reference a null object.
> **Error:** Attempt to de-reference a null object. Error in expression '{!sendMessage}'.

> **Note:** You must be a Salesforce System Administrator to resolve this error.

Select your scenario

- The error occurs when clicking the **Send To Campaign Members** button
- The error occurs when clicking the **Refresh Statistics** button

The error occurs when clicking the Send To Campaign Members button

The template HTML may be corrupted. Please contact iContact for Salesforce Support. We can be reached at 1 (866) 331-3208, internationally at +1 (919) 926-4234, or via email at salesforce@icontact.com.

We're available Monday – Friday, 9 a.m. – 6 p.m. Eastern Time.

Allow mixed content in Internet Explorer

1. Click **Tools > Internet Options > Security > Custom Level**.
2. In the Miscellaneous section, click **Display Mixed Content > Enable**.

The error occurs when clicking the Refresh Statistics button

This error is generated when the API connection falls out of sync or if the user doesn't have the required permissions to refresh statistics.

Sync the API connection

1. Click the **App Launcher > Other Items > iContact Configuration**.
2. In the Salesforce Credentials section, click the **Submit Salesforce Credentials** button and **log in with your Salesforce System Administrator username and password.**

Check the permissions for the user's profile

1. Click **Setup > Setup Home > Users (under Administration) > Users**.
2. Locate the user's name, click the name, then click the **Profile link**.
3. Click the **Edit button**.
4. In the Standard Object Permissions section, at a minimum, set **Campaigns**, **Contacts,** and **Leads** to **Read**, **Create,** and **Edit**.
5. In the Custom Object Permissions section, at a minimum, **set iContact Clicked Links, iContact Global Statistics**, and **iContact Message Statistics** to **Read** and **Create**, then click **Save**.

Email status "Scheduled" or "In Progress"

If an email takes longer than expected to be sent, there's a chance the API window between iContact and Salesforce will close before iContact updates Salesforce with the status of the send. In most cases, regardless of the status, the email is sent without any trouble at all.

Verify whether or not the email was sent

1. Login to iContact directly.
2. In iContact, click **Email > Sent Messages**. If the email is listed on the Sent Messages page, then it was sent. If the email is not listed, then it was not sent.

If you are not certain if a message was sent, or the message status does not say Released please contact Support for further assistance.

iContact for Salesforce Support. We can be reached at 1 (866) 331-3208, internationally at +1 (919) 926-4234, or via email at salesforce@icontact.com.

We're available Monday – Friday, 9 a.m. – 6 p.m. Eastern Time.

Field accessibility

Error: Field accessibility is not properly assigned for one or more of the fields required by iContact for Salesforce. Note: You must be a Salesforce System Administrator to resolve this error.

A Permission Set will resolve most field and object access errors. Visit the iContact Help Portal for steps to create the iContact for Salesforce Permission Set and assign the iContact for Salesforce app to User Profiles. Click here to go to the Help Portal

Insufficient access / privileges

Error: Insufficient Access.
Error: Insufficient Privileges.

Note: You must be a Salesforce System Administrator to resolve this error.

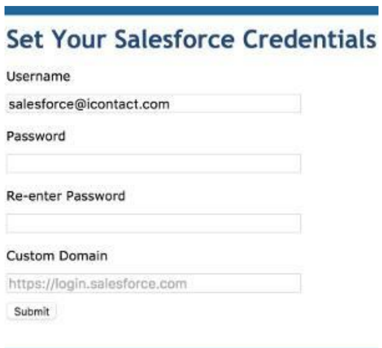
1. Click **Setup > Setup Home > Users (under Administration) > Users**.
2. Locate the user who experienced the error and click their name.
3. Click the **Edit button**.
4. Check the **Marketing User box** in the right column of the General Information section, then click **Save**.

Invalid credentials

Error: Your Salesforce API credentials are invalid. Please resubmit.

Note: You must be a Salesforce System Administrator to resolve this error.
By default, Salesforce requires a password change every 90 days. When the

admin who gave iContact permission to access your org updates his or her password, the API connection falls out of sync because the old password is no longer valid.



Sync the API connection

1. Click the **App Launcher > Other Items > iContact Configuration**.
2. In the Salesforce Credentials section, click the **Submit Salesforce Credentials** button and **log in with your Salesforce System Administrator username and password**.

List has no rows for assignment to SObject

Error: List has no rows for assignment to SObject.

Note: You must be a Salesforce System Administrator to resolve this error.

Note: A Permission Set will resolve most field and object access errors. Visit the iContact Help Portal for steps to create the iContact for Salesforce Permission Set and assign the iContact for Salesforce app to User Profiles. Click here to go to the Help Portal

The error occurs when clicking the Send To Campaign Members button

Please contact iContact for Salesforce Support. We can be reached at 1 (866) 331-3208, internationally at +1 (919) 926-4234, or via email at **salesforce@icontact.com.**

We're available Monday – Friday, 9 a.m. – 6 p.m. Eastern Time.

List index out of bounds

Error: List index out of bounds:

Note: You must be a Salesforce System Administrator to resolve this error.

Select your scenario

1. The error occurs when clicking the **iContact Send - Lightning** button.
2. The error occurs when clicking the **Send To Campaign Members** button.

Confirm that the email folder is accessible by all users and that it contains at least one template that was made available for use

1. Click **Setup > Setup Home > Email (under Administration) > Email Templates**.
2. In the Folder drop down, select the folder that contains the template you're trying to send.
3. Click the **Edit link** next to the Folder drop down.
4. Click **This folder is accessible by all users,** then click **Save**.
5. Confirm that the template you want to send was marked as available for use. If not, click the **Edit link** next to the template, check the **Available For Use box**, then click **Save**.

If the error persists, the template HTML may be corrupted. Please contact iContact for Salesforce Support. We can be reached at 1 (866) 331-3208, internationally at +1 (919) 926-4234, or via email at salesforce@icontact.com. We're available Monday – Friday, 9 a.m. – 6 p.m. Eastern Time.

The error occurs when clicking the Send To Campaign Members button
This error is generated when the API connection falls out of sync, by an ampersand in the From Name, or by a fully spelled-out State name.

Sync the API connection

1. Click the **App Launcher > Other Items > iContact Configuration**.
2. In the Salesforce Credentials section, click the **Submit Salesforce Credentials** button and **log in with your Salesforce System Administrator username and password**.

Confirm the Sending Option

1. Check the From Name field. If there is an ampersand (&), replace it with the word "and."
2. Check the State field. If the state is spelled-out, replace it with the state's two-letter abbreviation.

If the error persists, the template HTML may be corrupted. Please contact iContact for Salesforce Support. We can be reached at 1 (866) 331-3208, internationally at +1 (919) 926-4234, or via email at **salesforce@icontact.com.**

We're available Monday – Friday, 9 a.m. – 6 p.m. Eastern Time.

Missing template folder

To help reduce clutter, template folders disappear from iContact for Salesforce if they aren't accessible by all users in your org and if they don't contain at least one template that was marked as available for use.

Display missing template folders

1. Click **Setup > Setup Home > Email (under Administration) > Email Templates**.
2. Select the missing template folder from the Folder drop down.
3. Click the **Edit link** next to the Folder drop down.
4. Click **This folder is accessible by all users**, then click **Save**.
5. Confirm the folder contains at least one template that was marked as available for use. If not, click the **Edit link** next to any template, check the **Available For Use box**, then click **Save**.

Mixed Content

- The Salesforce API Connection section is blank.
- The **Send To Campaign Members** button isn't working.

These issues have one root cause: mixed content. Mixed content occurs when you're attempting to load content of varying levels of security onto a page. iContact meets Salesforce's security standards, but Salesforce is more secure than iContact. If nothing happens when you're trying to sync the API connection, or send an email, your browser might be blocking mixed content.

Allow mixed content in Chrome

1. Click the **gray shield** on the right side of the URL bar.
2. Click **Load unsafe scripts**.

Allow mixed content in Firefox

1. Click the **green lock** on the left side of the URL bar.
2. Click the arrow on the right side of the pop-up, then click **Disable Protection For Now**.

Allow mixed content in Internet Explorer

1. Click **Tools > Internet Options > Security > Custom Level.**
2. In the Miscellaneous section, click **Display Mixed Content > Enable**.

You can not allow mixed content in Safari

If you're using Safari 8 or later, Apple has not yet provided a way to allow mixed content. We suggest downloading Chrome or Firefox and using one of those browsers instead.

No valid recipients

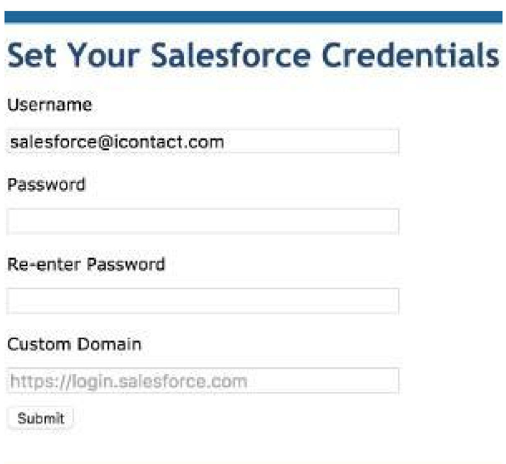
Error: There are no valid recipients in this Campaign.

Error: The Targeted Send options you selected contain no recipients. Please try again.

Note: You must be a Salesforce System Administrator to resolve this error.

Are you trying to send email from a Sandbox?
Sending is disabled in Sandbox environments and may result in the "No valid recipients" error. If you're working in a Sandbox, install iContact for Salesforce in your production environment and try sending again.

Have you recently changed your Salesforce password?
By default, Salesforce requires a password change every 90 days. When the user who gave iContact permission to access your Salesforce org updates his or her password, the API connection falls out of sync because the old password is no longer valid.



Sync the API connection

1. Click the **App Launcher > Other Items > iContact Configuration**.
2. In the Salesforce Credentials section, click the **Submit Salesforce Credentials** button and **log in with your Salesforce System Administrator username and password**.

Are your Campaign Members Contacts or Leads?
iContact for Salesforce sends email to Contacts and Leads only.

Do your Contacts or Leads have an email address in the standard Salesforce Email field?
iContact for Salesforce can only send email to Contacts or Leads who have an email address in the standard Salesforce Email field.

Is the Email Opt Out box checked for every Contact or Lead in the Campaign?
iContact for Salesforce can't send email to Contacts or Leads who have opted out of receiving your email.

Has every Contact or Lead bounced from a previous send?
iContact for Salesforce can send email to Campaign Members who are subscribed to your account and who are not in a bounced status. Confirm the deliverability status of your Campaign Members in your bundled iContact account.

1. Copy the email address of a Contact or Lead in the Campaign.
2. Login to iContact directly.
3. Click **Contacts > Search Contacts**.
4. Paste the email address in the Quick Search box, then click **Quick Search**.

> **Note:** The information above the table tells you whether the Contact or Lead is in a bounced status or if they unsubscribed from your account. You can click Manage Contact > View History to see when a Contact or Lead bounced or unsubscribed.

Are you trying to send a Targeted Send based on an email that was originally sent using iContact for Salesforce Lite?
Because iContact for Salesforce doesn't track data at the Contact or Lead level when you send email using iContact for Salesforce Lite, the Targeted Send functionality is lost. For more information about Targeted Sends, see Chapter 10: Sending a Targeted Send.

Was the email sent using the normal version of iContact for Salesforce that tracks clicks for individuals and are you trying to send a Targeted Send to Contacts or Leads who clicked a specific link in an email?

> Please contact iContact for Salesforce Support. We can be reached at 1 (866) 331-3208, internationally at +1 (919) 926-4234, or via email at **salesforce@icontact.com**.
>
> We're available Monday – Friday, 9 a.m. – 6 p.m. Eastern Time.

Null

Error: Null

Note: You must be a Salesforce System Administrator to set the new passwords.

This error is generated by a past-due balance on your bundled iContact account, by a mismatch between your bundled iContact account password and your iContact API password, or by exceeding the Salesforce API limit or data storage limit.

Is there a past-due balance on your bundled iContact account?

1. Login to iContact directly.
2. Click the **Account drop down > Invoices And Receipts.** The Account drop down displays your name or a colleague's name.

Outstanding invoices will be listed in red. Partner with your Finance team to make payment.

Did you change your iContact API password?
iContact for Salesforce is designed to seamlessly connect via the API to your bundled iContact account for sending email and gathering statistics. If your iContact API password was changed and the iContact Configuration settings were not updated to match, then you may encounter a Null error.

Update your iContact API password

1. Login to iContact in an alternate browser. If you usually work in Firefox, open Chrome. If you usually work in Chrome, open Firefox.
2. Click the **Account drop down > Settings and Billing > iContact Integrations**. The Account drop down displays your name or a colleague's name.
3. Locate the iContact for Salesforce integration and click View Details.
4. Click on the orange Regenerate button to create a new API password.
5. Carefully copy the API password.

Note – the API password is not used to login to your iContact account. This password should not need to be remembered of used again.

6. **Sign out of iContact and close your alternate browser**.

Update the iContact API password in Salesforce and sync the API connection

1. **Log in to Salesforce in your primary browser.**
2. Click the **App Launcher > Other Items > iContact Configuration**.
3. Click the **Edit button** beside the API Password box.
4. Update the API Password box with your preferred password, then click **Save**.
5. In the Salesforce Credentials section, click the **Submit Salesforce Credentials** button and **log in with your Salesforce System Administrator username and password**.

Have you exceeded the Salesforce API or Salesforce data storage limit?

1. Click **Setup >** search for **System Overview**.
    a. If the API Usage box or Data Storage section in the Schema box is red, then you have exceeded one or both of the limits.
    b. If you exceeded the API usage limit, then you must wait for the API usage limit to reset automatically or contact Salesforce Support and request a manual reset. Salesforce Support can be reached at 1 (800) 667-6389, online at help.salesforce.com, or by email at **supportresponse@salesforce.com**.

If you exceeded the data storage limit, then you must purchase more storage from Salesforce or delete data from your org. For more information about deleting iContact Message Statistics, see **Delete iContact Message Statistics data.**

Password is not recognized

Error: The password you provided is not recognized.

Note: You must be a Salesforce System Administrator to resolve this error.

This error is usually generated by a mismatch between your iContact API password or by trying to send an email from a Sandbox.

Update your iContact API password

1. Login to iContact in an alternate browser. If you usually work in Firefox, open Chrome. If you usually work in Chrome, open Firefox.
2. Click the **Account name drop down > Settings and Billing > iContact Integrations > iContact for Salesforce – select View Details**.
3. Click on the Regenerate password button, and copy the new API password.

Note; the API password is not the same as your iContact Account password. You have not changed the account password. You will not use the API password to login to iContact, and you do not need to remember the API password.

Update the iContact API password in Salesforce and sync the API connection

1. **Log in to Salesforce in your primary browser**.
2. Click the **App Launcher > iContact Configuration**.
3. Click the **Edit button** beside the API Password box.
4. Update the API Password box with the new password copied from iContact, then click **Save**.
5. In the Salesforce Credentials Section, click on the button **Submit Salesforce Credentials**, and enter **your Salesforce System Administrator username and password**. Note; do not enter the API password!

iContact for Salesforce and Sandbox

Sending is disabled in Sandbox environments and may result in the “Password is not recognized” error. If you’re working in a Sandbox, install iContact for Salesforce in your production environment and try sending again.

Unable to cancel email

Error: The iContact Message ID is currently not available to cancel the send.
Please try again.

This error is generated when you attempt to cancel an email that's too far along in the sending process to be canceled from Salesforce. Follow these steps to attempt to cancel the email from your bundled iContact account.

1. Login to iContact directly.
2. Click **Email > Scheduled Messages > Cancel This Message**.

For more information about canceling email, see Chapter 8: Canceling email.

Unable to sync the API connection

Syncing the API connection should be as easy as typing your password and clicking Submit. Should you ever run into trouble, follow these steps to get back up and running.

1. Confirm that you're using the correct Salesforce username and password combination by logging out of Salesforce and logging in again by typing your username and password.
2. If you log in to Salesforce at a custom domain, confirm that you added the custom domain to the Salesforce API Connection section.
3. If you use a security token when you log in to Salesforce, confirm that you're using your security token to sync the API connection.
4. If you use Single Sign-On or a password manager, it may be auto-populating the password field with an old password. Temporarily disable Single Sign-On or your password manager and try again.
5. Partner with another System Administrator in your org and try syncing the API connection with his or her Salesforce credentials.
6. Confirm that iContact's IP ranges are trusted by your org and that your session isn't locked to an IP address.
    a. Click **Setup > Setup Home > Security (under Settings) > Network Access**.
    b. Check that the following Trusted IP Ranges are listed. If necessary, click the **New button** to add them.

        66.192.165.133 - 66.192.165.133
        69.166.132.241 - 69.166.132.254
        69.166.134.129 - 69.166.134.158

    c. Click **Setup > Setup Home > Security (under Settings) > Session Settings**.
    d. In the Session Settings section, uncheck **Lock sessions to the IP address from which they originated**.

7. Confirm that you haven't exceeded your API limit in Salesforce.
    a. Click **Setup > Setup Home > Environments (under Platform Tools) > System Overview.**

    If the API Usage box is red, then you have exceeded the limit. You must wait for the API usage limit to reset automatically or contact Salesforce Support and request a manual reset. Salesforce Support can be reached at 1 (800) 667-6389, online at help.salesforce.com, or by email at supportresponse@salesforce.com.

8. Confirm your firewall isn't blocking iContact.
    a. Click **Setup > Setup Home > Users (under Administration) > Users > click your name > Login History link.**

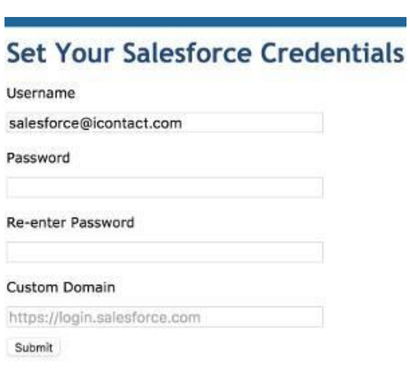
    If the Source IP for the iContact/Corp/ Application is Restricted, then your firewall is blocking iContact. Please partner with your IT team for further assistance.

Unable to validate merge fields

Error: Unfortunately, we encountered a problem when attempting to validate the merge fields for this template.

Note: You must be a Salesforce System Administrator to resolve this error.

By default, Salesforce requires a password change every 90 days. When the user who gave iContact permission to access your Salesforce org updates his or her password, the API connection falls out of sync because the old password is no longer valid.



Sync the API connection

1. Click the **App Launcher > Other Items > iContact Configuration** – the singular option.
2. In the Salesforce Credentials section, click the **Submit Salesforce Credentials** button and, **log in with your Salesforce System Administrator username and password**.

Unknown error

Error: Unknown error.

Note: You may need to be the iContact Account Administrator or a Salesforce System Administrator to resolve this error.

This error is generated by a mismatch between your bundled iContact account password and your iContact API password, by the API connection falling out of sync, by a past-due balance on your bundled iContact account, or by a Deliverability issue.

Did you change your bundled iContact account password?
iContact for Salesforce is designed to seamlessly log you in to your bundled iContact account when necessary. We're able to do this if your iContact account password matches your iContact API password. If your iContact account password was changed and the iContact API password wasn't updated to match, then you may encounter an Unknown error.

Update your iContact API password to match your iContact account password

1. Login to iContact in an alternate browser. If you usually work in Firefox, open Chrome. If you usually work in Chrome, open Firefox.
2. Click the **Account drop down > User Settings.** The Account drop down displays your name or a colleague's name.
3. Temporarily change your preferred password to something easy to remember, like your mom's nickname and birth year.
4. Paste the following into the URL bar: https://app.icontact.com/icp/core/registerapp
5. In the API 2.0 Authentication section, click **Change your API password for this AppId**.
6. In the Change Password For iContact for Salesforce section, type your preferred password into the Create A Password box, then click **Save**.
7. Click the **Account drop down > User Settings**.
8. Change the iContact account password from the temporary password to your preferred password. The iContact account password and the iContact API password should now be the same.
9. **Sign out of iContact and close your alternate browser**.

Update the iContact API password in Salesforce and sync the API connection

1. **Log in to Salesforce in your primary browser**.
2. Click the **App Launcher > Other Items > iContact Configuration**.
3. Click the **Edit button** beside the API Password box.
4. Update the API Password box with your preferred password, then click **Save**.
5. In the Salesforce Credentials section, click the **Submit Salesforce Credentials** button and **log in with your Salesforce System Administrator username and password**.

Is there a past-due balance on your bundled iContact account?

1. Login to iContact directly .
2. Click the **Account drop down > Invoices And Receipts**. The Account drop down displays your name or a colleague's name.

Outstanding invoices will be listed in red. Partner with your Finance team to make payment.
Resolve any Deliverability issues

If you received an email from our Deliverability team regarding your bundled iContact account, partner with them and confirm your account is still in good standing.

iContact Deliverability can be reached at 1 (888) 538-5590, internationally at +1 (919) 957-6070, by email at deliverability@icontact.com, or by chat at iContact.com . iContact Deliverability hours are Monday - Friday, 8 a.m. - 8 p.m. Eastern Time.

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Support

iContact Help Portal

Most errors and questions are answered in the Help Articles. We wrote hundreds of articles to help you get the most out of iContact for Salesforce and your bundled iContact account. Available 24 hours a day, 7 days a week, the iContact Help Portal is a great resource for resolving common errors, tutorials, and more. Knowledge is power

iContact for Salesforce Support

Reach out to iContact Support for iContact for Salesforce-specific questions. For example, questions about your iContact account, billing, or getting additional help with anything outlined in our Help articles. iContact for Salesforce Support can be reached at 1 (866) 331-3208, internationally at +1 (919) 926-4234, or by email at salesforce@icontact.com. iContact for Salesforce Support hours are Monday - Friday, 9 a.m. - 6 p.m. Eastern Time.

iContact Deliverability

iContact Deliverability if you have questions about bounces, list cleaning, or if sending is disabled for your account. iContact Deliverability can be reached by email at deliverability@icontact.com iContact Deliverability hours are Monday - Friday, 8 a.m. - 8 p.m. Eastern Time.

iContact Sales

Reach out to iContact Sales if you wish to upgrade your account. iContact Sales can be reached at 1 (877) 820-7837, internationally at +1 (919) 957-6150, or by email at sales@icontact.com. iContact Sales hours are Monday - Friday, 9 a.m. - 6 p.m. Eastern

iContact Design Services

Reach out to iContact Design Services if you need professional help with HTML templates. For example, adding or moving sections or columns, customizing code you built, or designing a custom template.

iContact Design Services can be reached by email at designservices@icontact.com. iContact Design Services hours are Monday - Friday, 8 a.m. - 6 p.m. Eastern Time.

Salesforce Support

Reach out to Salesforce Support for all Salesforce-specific questions that fall outside the scope of our support. For example, errors adding Campaign Members, difficulty building reports, or workflows. Salesforce Support can be reached at 1 (800) 667-6389, online at https://help.salesforce.com/s/, or by email at supportresponse@salesforce.com.

Thank you

for using iContact for Salesforce Lightning!