



# iContact for Salesforce User Guide

Exploring iContact for Salesforce  
Salesforce Classic

# Contents

## Chapter 1: Welcome to iContact for Salesforce

iContact for Salesforce workflow overview

Supported Browsers

Improved Setup User Interface

## Chapter 2: Creating an email

Using MessageBuilder

Using MessageCoder

iContact Design Services

## Chapter 3: Copying an email from iContact into Salesforce

Avoid the Send Test And Verify Merge Fields button

## Chapter 4: Creating a Campaign

Campaign page overview

## Chapter 5: Adding Campaign Members

Using the Manage Members button

Adding Campaign Members from a report

Adding Campaign Members from the Contacts or Leads page

Uploading Campaign Members from a .csv using the Data Import Wizard

## Chapter 6: Sending email

iContact Sent Message Detail

Sender Properties

Spam check

## Chapter 7: Scheduling email

The most important thing to know about scheduling email

## Chapter 8: Canceling email

The most important thing to know about canceling email

## Chapter 9: Updating statistics

Update statistics for Campaigns

Update statistics for specific emails

## Chapter 10: Sending a Targeted Send

Send a Targeted Send to a Campaign

Send a Targeted Send to an email

## Chapter 11: Running a report

iContact reports and dashboards

Customizing reports

Custom report types

## Appendix A: About your bundled iContact account

Accessing your bundled iContact account

Home

Contacts

Email

Social

Reports

Account Settings

## Appendix B: Frequently-asked questions

Can I embed video in my email?

Can I send attachments?

How frequently should I update statistics?

Some of my subscribers opened and clicked *a lot*. Is the tracking broken?

Why doesn't iContact send email to all Campaign Members?

Why is there "No Info" for so many people?

## Appendix C: Tutorials

Add additional fields to the iContact related lists

Create an iContact for Salesforce Permission Set

Delete iContact Message Statistics data

Merge fields

Run a report on Campaign Members

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

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

Run a report on Contacts and Leads who received a specific email

Run a report on Converted Leads  
Run a report on iContact Sent Message Statistics  
Run a report on opens sorted by email subject  
Uninstall iContact for Salesforce  
Whitelisting iContact and updating your Sender Policy Framework (SPF) record

## Appendix D: Errors

Attempt to de-reference a null object  
Email status is stuck as “Scheduled” or “In Progress”  
Field accessibility  
iContact login page  
The iContact MessageBuilder or Help tab is blank  
Insufficient access / privileges  
Invalid credentials  
List has no rows for assignment to SObject  
List index out of bounds  
Missing Add To Campaign button  
Missing template folder  
No valid recipients  
Null  
Password is not recognized  
The Salesforce API Connection section is blank  
The Send To Campaign Members button isn't working  
Session has timed out  
Unable to cancel email  
Unable to sync the API connection  
Unable to validate merge fields  
Unknown error

## Appendix E: Support

iContact Help Portal  
iContact for Salesforce Support  
iContact Deliverability  
iContact Sales  
iContact Design Services  
Salesforce Support

# 1

## Welcome to iContact for Salesforce

If you're new to iContact for Salesforce, this guide is for you. Each chapter of this book walks you through the major features and helps you learn by doing. Later, when you're ready and you've built a solid foundation on the basics, you can jump into some serious email marketing.

This book assumes you've already installed iContact for Salesforce in your org. If you haven't, partner with a System Administrator and follow the Installation Guide for your org below.

Salesforce Classic  
**Enterprise & Unlimited**

Salesforce Classic  
**Professional**

### [iContact for Salesforce workflow overview](#)

The typical iContact for Salesforce workflow is just five easy, intuitive steps.

#### **Step 1: Create an email**

Thanks to the iContact MessageBuilder and MessageCoder editors, creating email has never been easier. And if you already have a collection of Salesforce HTML with Letterhead templates, then you're ahead of the game. Simply build a Campaign and click iContact Send.

#### **Step 2: Create a Campaign**

iContact for Salesforce sends email to Contacts and Leads who are members of a Campaign. Create a Campaign and choose from a variety of methods to populate it.

#### **Step 3: Send an email to a Campaign**

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 the iContact Send button on a Campaign.

#### Step 4: Update statistics

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

#### Step 5: Run reports on the statistics

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

### Supported Browsers

[Chrome](#) and [Firefox](#) offer the best experience with iContact for Salesforce and our documentation assumes you're using one of those two browsers. The table below outlines the complete list of browsers that are supported by iContact for Salesforce.

Browser	Details
Chrome	The most recent and stable version. Our specific recommendation.
Firefox	The most recent and stable version.
Internet Explorer	Versions 9, 10, and 11
Safari	Versions 5.x, 6.x, and 7.x on Mac OS X Lion and before.

### Improved Setup User Interface

Unless otherwise noted, all instructions in this guide should be carried out in Salesforce. Furthermore, this guide assumes you're using the Improved Setup User Interface in Salesforce. For the best experience following this guide, please configure your Setup Interface accordingly.

1. Log in to Salesforce.
2. Click **Setup > Customize (under App Setup) > User Interface**.
3. In the Setup section, check **Enable Improved Setup User Interface**, then click **Save**.

# 2

## Creating an email

With the iContact MessageBuilder and MessageCoder editors, creating email has never been easier. Choose from over 600 professionally-designed, mobile responsive email templates in MessageBuilder or design something amazing from the ground up with your own HTML and CSS in MessageCoder.

Chapters 2 and 3 were written specifically to help you build an email in iContact and copy it into Salesforce. If you already have a collection of Salesforce HTML with Letterhead templates, feel free to skip ahead to [Chapter 4: Creating a Campaign](#).

### Get started creating an email

1. Click the **iContact MessageBuilder** tab or [log in to iContact directly](#). If you logged in to iContact directly, click **Email > Messages**.
2. If you want to start with one of our pre-designed templates, click **Use MessageBuilder**. If you want to write your own HTML and CSS, click **Use MessageCoder**.

#### Create an Email Message



### Using MessageBuilder

The iContact MessageBuilder Editor is designed for users who prefer not to work with code. With iContact MessageBuilder, emails are designed using blocks and an intuitive “What You See Is What You Get” or WYSIWYG interface so you can visually compose a Campaign-perfect email in minutes.

## Selecting a template

After clicking Use MessageBuilder, the Select A Template page appears. Here you can browse over 600 professionally-designed templates which are conveniently organized into categories. Check or uncheck categories to broaden or narrow the selection of templates you see.

When you find a template you like, click the **Use Template button**.

## Basic templates

If your tastes are subtle and more refined or if you'd like to send a text-only email, then the Basic template category is for you. The Basic category boasts dozens of templates that are built with an elegant form and structure, and none of the styling.

**Note:** It's possible to build a text-only email using another iContact email creation tool, but we don't recommend it. Text-only emails are, by definition, text only. They lack our embedded tracking pixel and traditional clickable links, which means it's impossible for us to report on which Contacts or Leads opened and engaged with your email. If email statistics are important to you, use a Basic template.

## Customizing and editing your template

After clicking the Use Template button, the Create An Email Message page appears. The page contains the Template Organization section, the Editor Toolbar, the Editor Window, and the Save section.

The screenshot shows the 'Create an Email Message' interface. It includes a 'Template Organization' section with fields for 'Sender property', 'Message name', and 'Email subject'. Below this is the 'Editor Toolbar' with various formatting options. The 'Editor Window' displays a blue banner with the text 'LOGO | HERE'. At the bottom, there is a 'Save Section' with options to 'Export Template', 'Save as Draft', 'Proceed to Send', and 'Custom Templates'.


Labels on the right side of the screenshot:

- Template Organization
- Editor Toolbar
- Editor Window
- Save Section



## Template Organization section

The Template Organization section gives you three ways to organize your templates, by Sender Property, Email Subject, and Message Name.

The 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 Sender Properties, see [Sender Properties](#). For more information about our anti-spam policy, see the [Anti-Spam Policy page](#)  on our website.






## The Editor Toolbar

The Editor Toolbar is the control panel of our WYSIWYG editor. It gives you direct access to every design element of your email, including access to the code (in case you're feeling adventurous).

## Text Tab

Use the Text Tab to control the formatting and layout of your text.



Icon	Description
	<b>Cut.</b> Remove content from your email and copy it to your clipboard.
	<b>Copy.</b> Copy content to your clipboard.
	<b>Paste.</b> Add content from your clipboard to your email.
	<b>Insert link.</b> Turn text or images into a link. Link to websites or anchors within your email; create Mailto links that open an email with a pre-populated email address, subject, and message; create links with iContact URL merge fields, including a Manage Your Subscription URL, an Opt-In URL, and a Web Version URL; and create Click To Call links for phone numbers.
	<b>Remove link.</b> Remove a link from text or images.



**Anchor.** Add an anchor to jump to a specific location in your email.



**Merge field.** Add a merge field to dynamically customize an email for each individual Contact and Lead. For more information about merge fields, see [Merge Fields](#).



**Social tools.** Add a Facebook Like, a Twitter Tweet, a Google+ +1, or a LinkedIn Share button to your email.



**Strikethrough.** Strikethrough text.



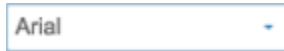
**Subscript.** Format text as subscript.



**Superscript.** Format text as superscript



**Font size.** Set the size of text.



**Font.** Set the font for text.



**Bold.** Format text as bold.



**Italic.** Format text as italic.



**Underline.** Format text as underlined.



**Font color.** Set the color of text.



**Numbered list.** Add a numbered list to your email.



**Bulleted list.** Add a bulleted list to your email.



**Decrease indent.** Decrease the indentation of text.



**Increase indent.** Increase the indentation of text.



**Align left.** Align content to the left.



**Align center.** Center content.



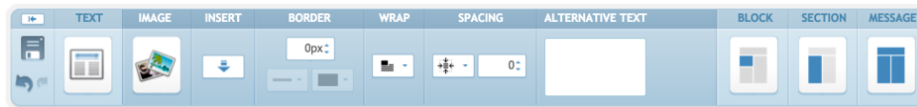
**Align right.** Align content to the right.



**Justify.** Justify content.

## Image Tab

Use the Image Tab to add images and control their formatting and layout.











Icon	Description
	<b>Insert image.</b> Add an image to your email. For more information about images, see <a href="#">Image Library</a> .
	<b>Border width.</b> Set the width of an image's border.
	<b>Border style.</b> Set the style of an image's border.
	<b>Border color.</b> Set the color of an image's border.
	<b>Wrapping style.</b> Set the wrapping style of an image.
	<b>Spacing position.</b> Specify which side of an image receives spacing.
	<b>Spacing amount.</b> Set the amount of spacing.
	<b>Alternative text.</b> Set the alternative text for an image. Alternative stands in place of your image if your subscriber's inbox is set not to display images. It can also be read by screen readers to enhance accessibility.

**Warning:** Image borders, border styles, border colors, wrapping, and spacing are not fully supported by all inboxes. For more information about which style options are supported by popular inboxes, check out the [Email Standards Project](#).

## Block Tab

A block is a container that can hold text, images, and links. Use the Block Tab to control the formatting and layout of your blocks.










Icon	Description
	<b>Background color.</b> Set the background color of a block.
	<b>Border edge.</b> Specify which side of a block receives a border.
	<b>Border width.</b> Set the width of a block's border.
	<b>Border style.</b> Set the style of a block's border.
	<b>Border color.</b> Set the color of a block's border.
	<b>Spacing position.</b> Specify which side of a block receives spacing.
	<b>Spacing amount.</b> Set the amount of spacing.
	<b>HTML.</b> Make changes directly to a block's HTML and inline CSS.

**Warning:** Block borders, border styles, border colors, and spacing are not fully supported by all inboxes. For more information about which style options are supported by popular inboxes, check out the [Email Standards Project](#).

## Section Tab

A section is a container that can hold blocks. Use the Section Tab to control the formatting and layout of your sections.

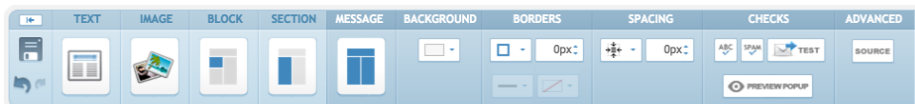




Icon	Description
	<b>Background color.</b> Set the background color of a section.
	<b>Border edge.</b> Specify which side of a section receives a border.
	<b>Border width.</b> Set the width of a section's border.
	<b>Border style.</b> Set the style of a section's border.
	<b>Border color.</b> Set the color of a section's border.
	<b>Spacing position.</b> Specify which side of a section receives spacing.
	<b>Spacing amount.</b> Set the amount of spacing.











**Warning:** Section borders, border styles, border colors, and spacing are not fully supported by all inboxes. For more information about which style options are supported by popular inboxes, check out the [Email Standards Project](#).


### Message Tab

Use the Message Tab to control the formatting and layout of your email, to run spell check and spam check, and to send Test Emails to yourself or a colleague.



Icon	Description
	<b>Background color.</b> Set the background color of the email.
	<b>Border edge.</b> Specify which side of the email receives a border.

	<b>Border width.</b> Set the width of the email's border.
	<b>Border style.</b> Set the style of the email's border.
	<b>Border color.</b> Set the color of the email's border.
	<b>Spacing position.</b> Specify which side of the email receives spacing.
	<b>Spacing amount.</b> Set the amount of spacing.
	<b>Spell check.</b> Run spell check.
	<b>Spam check.</b> Run spam check. For more information about spam scoring, see <a href="#">Spam check</a> .
	<b>Send Test Message.</b> Send a test email to review the design of your email in your inbox.
	<b>Preview pop-up.</b> Preview your email on various screen widths.
	<b>Source code.</b> Make changes directly to a email's HTML and CSS.

**Warning:** Message borders, border styles, border colors, and spacing are not fully supported by all inboxes. For more information about which style options are supported by popular inboxes, check out the [Email Standards Project](#) .

### Save section

By clicking the **Save As Draft button**, you can save your work and return to it later.

You can also use the Custom Templates section to turn your email into a reusable template that you can find on the Select A Template page. To save your email as a reusable template, give it a name, then click the **Save button**.

**Warning:** Do not click the Proceed To Send button. Clicking the Proceed To Send button will send your email directly from iContact, bypassing iContact for Salesforce. If you send an email directly from iContact, your email will live in iContact. You will never see a record of it in

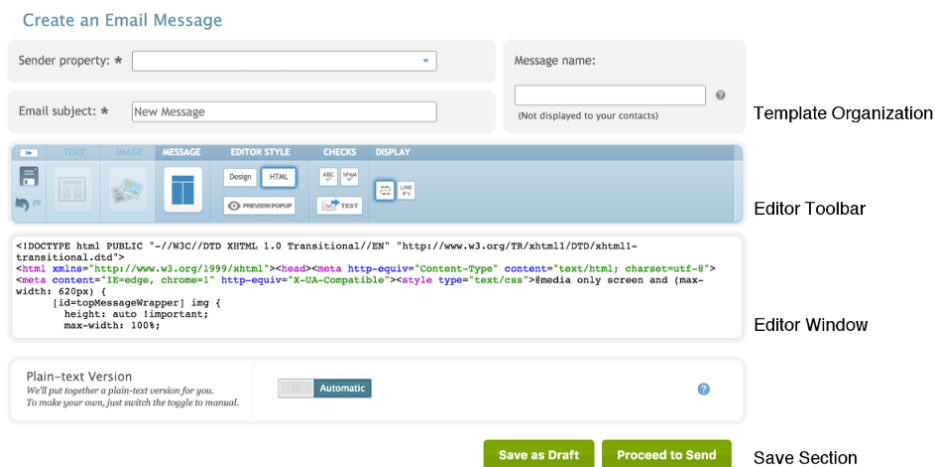
Salesforce and you will never be able to see its statistics in Salesforce.

## Using MessageCoder

The iContact MessageCoder Editor is designed for professional graphic designers and developers. With a blank canvas and direct access to the HTML and CSS of your email, you'll feel right at home.

To get started, click **Use MessageCoder**.

After clicking Use MessageCoder, the Create An Email Message page appears. The page contains the Template Organization section, the Editor Toolbar, the Editor Window, and the Save section.



### Template Organization section

The Template Organization section gives you three ways to organize your templates, by Sender Property, Email Subject, and Message Name.

The 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 Sender Properties, see [Sender Properties](#). For more information about our anti-spam policy, see the [Anti-Spam Policy page](#) on our website.












### The Editor Toolbar

The Editor Toolbar is the control panel of our WYSIWYG editor. It gives you direct access to every design element of your email, including unobstructed access to the code.

















## Text Tab

Use the Text Tab to control the formatting and layout of your text.



Icon	Description
	<b>Cut.</b> Remove content from your email and copy it to your clipboard.
	<b>Copy.</b> Copy content to your clipboard.
	<b>Paste.</b> Add content from your clipboard to your email.
	<b>Insert link.</b> Turn text or images into a link. Link to websites or anchors within your email; create Mailto links that open an email with a pre-populated email address, subject, and message; create links with iContact URL merge fields, including a Manage Your Subscription URL, an Opt-In URL, and a Web Version URL; and create Click To Call links for phone numbers.
	<b>Remove link.</b> Remove a link from text or images.
	<b>Anchor.</b> Add an anchor to jump to a specific location in your email.
	<b>Social tools.</b> Add a Facebook Like, a Twitter Tweet, a Google+ +1, or a LinkedIn Share button for your email.
	<b>Strikethrough.</b> Strikethrough text.
	<b>Subscript.</b> Format text as subscript.
	<b>Superscript.</b> Format text as superscript
	<b>Font size.</b> Set the size of text.













	<b>Font.</b> Set the font for text.
	<b>Bold.</b> Format text as bold.
	<b>Italic.</b> Format text as italic.
	<b>Underline.</b> Format text as underlined.
	<b>Font color.</b> Set the color of text.
	<b>Numbered list.</b> Add a numbered list to your email.
	<b>Bulleted list.</b> Add a bulleted list to your email.
	<b>Decrease indent.</b> Decrease the indentation of text.
	<b>Increase indent.</b> Increase the indentation of text.
	<b>Align left.</b> Align content to the left.
	<b>Align center.</b> Center content.
	<b>Align right.</b> Align content to the right.
	<b>Justify.</b> Justify content.
	<b>Insert table.</b> Add a table to your email.
	<b>Insert horizontal rule.</b> Add a horizontal rule to your email.
	<b>Insert special character.</b> Add a special character to your email.

## Image Tab

Use the Image Tab to add images and control their formatting and layout.



Icon	Description
	<b>Insert image.</b> Add an image to your email. For more information about images, see <a href="#">Image Library</a> .
	<b>Image width.</b> Set the width of an image.
	<b>Image height.</b> Set the height of an image.
	<b>Border width.</b> Set the width of an image's border.
	<b>Border style.</b> Set the style of an image's border.
	<b>Border color.</b> Set the color of an image's border.
	<b>Wrapping style.</b> Set the wrapping style of an image.
	<b>Spacing position.</b> Specify which side of an image receives spacing.
	<b>Spacing amount.</b> Set the amount of spacing.
	<b>Alternative text.</b> Set the alternative text for an image. Alternative stands in place of your image if your subscriber's inbox is set not to display images. It can also be read by screen readers to enhance accessibility.









**Warning:** Image borders, border styles, border colors, wrapping, and spacing are not fully supported by all inboxes. For more information about which style options are supported by popular inboxes, check out the [Email Standards Project](#).

### Message Tab

Use the Message Tab to control the formatting and layout of your email, to run spell check and spam check, and to send Test Emails to yourself or a colleague.



Icon	Description
------	-------------

	<b>Design mode.</b> Enter a WYSIWYG view to see the rendered design of your HTML and CSS.
	<b>HTML mode.</b> Enter a code view to see the HTML and CSS behind your design.
	<b>Preview pop-up.</b> Preview your email on various screen widths.
	<b>Spell check.</b> Run spell check.
	<b>Spam check.</b> Run spam check. For more information about spam scoring, see <a href="#">Spam check</a> .
	<b>Send Test Message.</b> Send a test email to review the design of your email in your inbox.
	<b>Word wrap.</b> Turn on or turn off the line wrapping for your code.
	<b>Line numbers.</b> Turn on or turn off the line numbers for your code.

### Save section

By clicking the **Save As Draft button**, you can save your work and return to it later.

**Warning:** Do not click the Proceed To Send button. Clicking the Proceed To Send button will send your email directly from iContact, bypassing iContact for Salesforce. If you send an email directly from iContact, your email will live in iContact. You will never see a record of it in Salesforce and you will never be able to see its statistics in Salesforce.

### iContact Design Services

For an additional fee, the iContact Design Services team is available if you're interested in something custom that was designed just for you and your business. They're also your best resource if you're running into trouble making big changes to your template, changes like adding or moving sections or columns, or customizing the code you built.

iContact Design Services can be reached by email at [designservices@icontact.com](mailto:designservices@icontact.com). iContact Design Services hours are Monday - Friday, 8 a.m. - 6 p.m. EST.

# 3

## Copying an email from iContact into Salesforce

You just designed the perfect email in iContact. Now, copy the email into Salesforce so you can send it to your Campaign Members.

This chapter was written specifically to help you copy an email from iContact into Salesforce. If you already have a collection of Salesforce HTML with Letterhead templates, feel free to skip ahead to [Chapter 4: Creating a Campaign](#).

### Copy your email's code in iContact

1. Click the **Message tab** on the editor toolbar. If you're using MessageBuilder, continue with Steps 2 and 3 below. If you're using MessageCoder, jump down and follow Steps 4 and 5.
2. Click the **Source button** in the Advanced section, then click **Continue**.
3. Select all the code and copy it to your clipboard, then click **Close**. Skip the next two steps and continue with the instructions below.
4. Click the **HTML button** in the Editor Style section.
5. Select all the code and copy it to your clipboard.

### Paste your email's code into Salesforce

1. Click **Setup > Communication Templates (under Administer) > Email Templates**.
2. Click the **New Template button**.
3. Select **Custom (without using Letterhead)**, then click **Next**.
4. Decide which folder to save the template in (we recommend the iContact Templates folder), check **Available For Use**, and give the template a name and unique name, then click **Next**.

**Note:** The Available For Use box isn't required by Salesforce, but it is required by iContact for Salesforce. If an email isn't made available, then it can't be sent with iContact for Salesforce.

5. Give the template a subject. This is the subject your subscribers will see when you send the email.
6. Paste the code into the HTML Body box, then click **Next**.
7. Click the **Copy Text From HTML Version button**, confirm that you want to copy text, then click **Save**.

### Avoid the Send Test And Verify Merge Fields button

The Send Test And Verify Merge Fields button is a Salesforce button that operates outside of iContact for Salesforce. Sending a test email using this button will send the email from Salesforce servers, not iContact for Salesforce servers, and may result in unexpected design, formatting, or deliverability issues.

Always test email by clicking the iContact Send button on a Campaign. For more information about sending email, see [Chapter 6: Sending email](#).

# 4

## Creating a Campaign

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

### Create a Campaign

1. Click the **Campaigns tab**.
2. Click the **New button**.
3. If Salesforce asks which record type you'd like to use, select the **iContact for Salesforce record type**, then click **Continue**. If Salesforce doesn't ask, skip this step.
4. 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.

Campaign Detail		Last Update Date 9/9/2016 2:11 PM	
Campaign Name	Test Campaign <a href="#">View Hierarchy</a>	Total Leads	0
Active	<input checked="" type="checkbox"/>	Converted Leads	0
Type	Email	Total Contacts	5
Status	In Progress	Total Responses	0
Start Date	8/8/2016	Num Total Opportunities	0
End Date	11/7/2016	Num Won Opportunities	0
Expected Revenue	\$150,000	Total Value Opportunities	\$0
Budgeted Cost	\$22,000	Total Value Won Opportunities	\$0
Actual Cost	\$23,500	Message Statistic Count	26
Parent Campaign		Expected Response (%)	30.00%
		Num Sent	0

## 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 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 <a href="#">Convert Qualified Leads</a> .
Description	The description of the Campaign. Up to 32KB of data are allowed in this field. Only the first 255 characters display 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

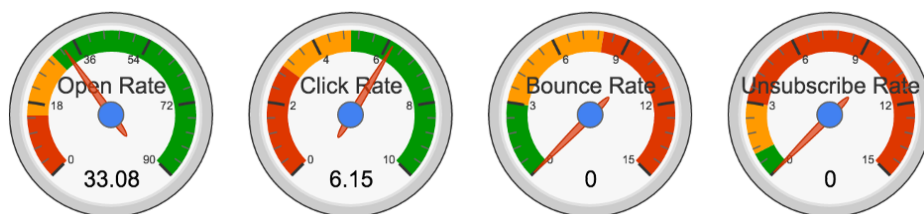


	Campaign. This field is read only. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.
Total Value Opportunities	The amount of all Opportunities associated with the Campaign, including closed/won Opportunities. This field is 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.

### Charts

The charts are a visual representation of the averages of the Open, Click, Bounce, and Unsubscribe rates for all emails in the Campaign with a status of Released.



Charts display averages from the 26 messages in the "Released" status.

## 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.

▼ Campaign Impact	
Average Open Rate 🟡 33.08%	Average Bounce Rate 🟡 0.00%
Average Click Rate 🟡 6.15%	Average Unsubscribe Rate 🟡 0.00%
▼ Success Criteria	
Open Rate Caution % 🟡 15.00%	Bounce Rate Caution % 🟡 3.00%
Open Rate Success % 🟡 30.00%	Bounce Rate Warning % 🟡 8.00%
Click Rate Caution % 🟡 3.00%	Unsubscribe Rate Caution % 🟡 1.00%
Click Rate Success % 🟡 5.00%	Unsubscribe Rate Warning % 🟡 3.00%
Description Fall 2016 product campaign.	

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 Sent Messages related list

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

Action	Message Subject	Scheduled Time	Unique Opens	Total Opens	Unique Clicks	Total Clicks	Delivered	Unsubscribes	Targeted	Status
Edit   Del	Change is in the air	9/9/2016 1:38 PM	2	3	1	2	5	0	<input type="checkbox"/>	Released
Edit   Del	3 Things we wish we knew when we started	9/8/2016 12:06 PM	1	2	1	1	5	0	<input checked="" type="checkbox"/>	Released
Edit   Del	I was so embarrassed	9/7/2016 3:04 PM	1	1	0	0	5	0	<input type="checkbox"/>	Released
Edit   Del	FLASH SALE - 50% OFF	9/6/2016 2:07 PM	5	7	3	3	5	0	<input type="checkbox"/>	Released
Edit   Del	Hello, {fname}!	9/5/2016 1:24 PM	1	1	0	0	5	0	<input type="checkbox"/>	Released

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 Sent 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 <a href="#">Why doesn't iContact send email to all Campaign Members?</a>
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.  <b>Scheduled.</b> The email is scheduled for release. <b>In Progress.</b> The email is in the process of being released. <b>Released.</b> The email was released. <b>Error.</b> There was a problem and the email was not released.

# 5

## Adding Campaign Members

iContact for Salesforce can send email to Contacts and Leads who are members of a Campaign. Salesforce is flexible and offers many ways to populate Campaigns.

### Using the Manage Members button

The Manage Members button is the easiest way to add Campaign Members directly from the page of any Campaign.

#### Add Campaign Members using the Manage Members button

1. Click the **Campaigns tab**.
2. Click the Campaign you want to add Members to.
3. Click the **Manage Members button > Add Members - Search**.
4. Select which member type to search, either Contacts or Leads.
5. Define your filter criteria, then click the **Go button**.
6. Check the box next to the name or names you want to add, then click the **Add With Status button > Sent**.

**Note:** When using the Manage Members button, Salesforce allows you to add Campaign Members in batches of up to 200 people.

## Adding Campaign Members from a report

Adding Campaign Members from a report is the most powerful way to populate your Campaigns. With Salesforce's robust reporting tools, you can drill down to your target Campaign Members in just a few clicks.


### Add Campaign Members by running a report

1. Click the **Reports tab**.
2. Click the **New Report button**.
3. Open the **Accounts & Contacts** or **Leads folder > Contacts & Accounts or Leads > Create button**.
4. Drill down to your target Contacts or Leads by using the Filters options, then click the **Run Report button**.
5. Click the **Add To Campaign button > Magnifying Glass icon**. Select a Campaign from the pick list.
6. Click the **Add To Campaign button**, then click **Done**.

**Note:** When adding Campaign Members by running a report, Salesforce allows you to add Campaign Members in batches of up to 50,000 people.

Salesforce only supports the Add To Campaign button on standard Account And Contact, Opportunities And Roles, Cases And Roles, and Lead reports. Salesforce does not support the Add To Campaign button on reports that include Custom Objects like the iContact Message Statistics object, nor does it support the button on reports that contain both Contacts and Leads.

If you run a report that doesn't support the Add To Campaign button, customize the report to include the Lead/Contact ID and Email fields, export the report to a .csv, then import it to your Campaign using the steps outlined in the [Uploading Campaign Members from a .csv using the Data Import Wizard](#) section below.

For more information about running reports in Salesforce, see [Reports and Dashboards](#)  in the Salesforce Success Community.

## Adding Campaign Members from the Contacts or Leads page

If your workflow frequently brings you to the Contacts or Leads page, use the Add To Campaign button to quickly add subscribers to your Campaigns.

### Add Campaign Members using the Add To Campaign button on the Contacts or Leads page

1. Click the **Contacts** or **Leads tab**.
2. Select a view from the View dropdown.
3. Check the box next to the name or names you want to add, then click the **Add To Campaign button**.
4. Click the **Magnifying Glass icon** and select a Campaign from the pick list.
5. Click the **Add To Campaign button**, then click **Done**.

**Note:** When adding Campaign Members from the Contacts or Leads page, Salesforce allows you to add Campaign Members in batches of up to 200 people.

## Uploading Campaign Members from a .csv using the Data Import Wizard



The Data Import Wizard makes it easy to add Campaign Members from a .csv by uploading the file directly to a Campaign. Salesforce will even create new Contact or Lead records for individuals who aren't already saved in your org.

### Add Campaign Members by uploading a .csv file to a Campaign

1. Click the **Campaigns tab**.
2. Click the Campaign you want to add Members to.
3. Click the **Manage Members button > Add Members - Import File**.
4. Follow the steps listed in the Data Import Wizard. Salesforce will send you an email when the upload is completed.

**Warning:** Salesforce will create a new Contact or Lead record for any individual uploaded without a Salesforce.com ID. In order to prevent duplicates in your org, do not upload Contacts or Leads who are already a part of your database without including their Salesforce.com ID in the upload file.

For more information about using the Data Import Wizard, see Salesforce's [Data Import](#)

[Series](#) . For more information about importing Campaign Members, see [Importing Campaign Members](#)  in the Salesforce Success Community.



# 6

## 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 the iContact Send button on a Campaign.

Up until now, everything we've covered has been 100% iContact or Salesforce. Now, without further ado, iContact for Salesforce.

### How to send email

1. Click the **Campaigns tab**.
2. Click the Campaign you want to send an email to.
3. Click the **iContact Send button**.
4. Give your browser permission to load mixed content.
  - If you're using Chrome
    1. Click the **gray shield** on the right side of the URL bar.
    2. Click **Load unsafe scripts**.
  - If you're using 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**.

**Note:** If you don't see a gray shield in Chrome or a green lock in Firefox, your browser is not blocking mixed content. For more information about mixed content, see [Mixed content](#).

5. In the Select Email Template section, select the folder that contains the email you want to send, then select the email itself. iContact for Salesforce 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](#).

Notification	Explanation
This template has no merge fields.	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. As long as you're using the correct merge fields for your Campaign Members and your Campaign Members have data to merge, the merge fields will work.
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. They will not work. Confirm the syntax of your merge fields and test them by sending a test email to your iContact for Salesforce Test Campaign.

- In the Sending Options section, select a Sender Property (also called a From Option). 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.
- In the Version section, check the box if you want to track email statistics for your subscribers. Uncheck the box if you don't want to track email statistics.
- In the Accept Terms And Conditions section, type your initials to certify you have the right to send email to your subscribers.
- Click the **Send To Campaign Members button** at either the top or bottom of the page.
- 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 Sent Message Detail

After clicking the Continue button, you'll be directed to the iContact Sent Message Detail page. The iContact Sent 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 Sent Message Detail page before the status is updated to In Progress. For more information about canceling email, see <a href="#">Chapter 8: Canceling email</a> .
Released	When iContact completes the send process, the email's status will update to Released. At that point, the Update Statistics button becomes active and you may update statistics. For more information about updating statistics, see <a href="#">Chapter 9: Updating statistics</a> .

## 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. Click the **iContact MessageBuilder tab** or [log in to iContact directly](#).
2. Click the **Account Drop Down > Sender Properties > Create A New Sender Property**. The Account drop down displays your name or a colleague's name.
3. 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 the **Campaigns tab**.
2. Click the Campaign you want to send an email to.
3. Click the **iContact Send button**.
4. In the Sending Options section, select **New** from the From Option dropdown.

5. Complete the required fields of the Sending Options section with the information for the new Sender Property.
6. When you're ready to send the email, click the **Send To Campaign Members button**.

**Warning:** Do not click the Create button in the Sending Options section. It will not create your new Sender Property. Clicking the button will only delete the text you entered in the other fields, requiring you to fill them out again.

### The anatomy of a Sender Property

Sender Properties are comprised of 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

From Name | From Email Address | Company | Physical Address | Physical Address

### Example Sender Property for iContact for Salesforce Support

iContact for Salesforce Support | salesforce@icontact.com | 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 field on the Edit A Sender Property page in your bundled iContact account.	Company 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	Address fields in the Sending Options section on the Send iContact Message page.

---

Property page in your bundled  
iContact account.

---

**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](mailto: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 target 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.

SpamAssassin has a [roundup of point names and descriptions](#) you can use to reduce your spam score and improve an email.

# 7

## 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 the **Campaigns tab**.
2. Click the Campaign you want to send an email to.
3. Click the **iContact Send button**.
4. 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.
  - Type your initials to certify you have the right to send email to your subscribers.
5. In the Scheduling section, click **Send Later**.
6. 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 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 Sent 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 Sent 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 8: Canceling email](#).

# 8

## Canceling email

We all make mistakes. At one point or another, you'll need to cancel an email. There's only one way to cancel an email and knowing how to do it is so important, we gave it its own chapter.

### How to cancel email

1. Click the **Campaigns tab**.
2. Click the Campaign that contains the email you need to cancel.
3. Click the **iContact Sent Messages link > click the name of the email you need to cancel**.
4. Click the **Cancel Send button**.

### If the email is too far along in the sending process

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

If you're unable to cancel the email because it's too far along in the sending process, then the sending process has already begun. Follow these steps to *attempt* to cancel it from your bundled iContact account.

1. Click the **iContact MessageBuilder tab** or **log in to iContact directly** [🔗](#).
2. Click **Email > Pending Messages > Cancel This Message**.

### 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 Sent 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 Sent 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. Other things that don't require Salesforce and iContact to work together -- things that can be accomplished in Salesforce without iContact -- don't trigger communication through the API, things like adding Campaign Members, running reports, and deleting emails.

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.

# 9

## Updating statistics

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

### Update statistics for Campaigns

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

1. Click the **Campaigns tab**.
2. Click the Campaign you want to update.
3. Click the **Update Statistics button**. A pop-up window will appear showing you the progress of the update.
4. When the update completes, **refresh the page**.

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

### Update statistics for specific emails

If you're interested in the statistics for a specific email, click the Update Statistics button on the iContact Sent Message Detail page for that email.

1. Click the **Campaigns tab**.
2. Click the Campaign that contains the email you want to update.
3. Click the **iContact Sent Messages link**.
4. Click the email you want to update.
5. Click the **Update Statistics button**.

# 10

## 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. Click the **Update Statistics button**. For more information about updating statistics, see [Chapter 9: Updating statistics](#).
4. Click the **Targeted Send button**.
5. Select your Targeted Send criteria, then click **Next**:
  - Send only to subscribers who opened a specific email.
  - Send only to subscribers who opened but did not click on a specific email.
  - Send only to subscribers who did not open a specific email.
  - 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.
  - 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.
  - Send only to subscribers who have not received an email from the Campaign.

6. 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.
  - Type your initials to certify you have the right to send email to 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. Click the **iContact Sent Messages link**.
4. Click the email you want to send a Targeted Send to.
5. Click the **Update Statistics button**. For more information about updating statistics, see [Chapter 9: Updating statistics](#).
6. Click the **Targeted Send button**.
7. Select your Targeted Send criteria, then click **Next**:
  - Send only to subscribers who opened the email.
  - Send only to subscribers who opened but did not click on the email.
  - Send only to subscribers who did not open the email.
  - 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.
8. 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.
  - Type your initials to certify you have the right to send email to your subscribers.
  - Decide whether to send this email immediately or to schedule it for later.

Click the **Send to Campaign Members button**.

# 11

## Running a report

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

### Running a report

1. Update statistics. For more information about updating statistics, see [Chapter 9: Updating statistics](#).
2. Click the **Reports tab**.
3. Select an iContact folder from the list of folders on the left and select a report or dashboard within the folder.

### iContact reports and dashboards

Running a report or viewing a dashboard is as easy as clicking the report or dashboard you need. This section outlines the reports and dashboards in detail so you can decide which starting point is best for you.

#### iContact Across Campaigns Dashboard folder

- **Across iContact Campaigns.** A high-level view of the success rate of your email marketing efforts across all iContact Campaigns.

#### iContact Campaign Contacts / Leads folder

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

- **iContact Campaign Contacts and Leads.** The most functional report, iContact Campaign Contacts and Leads shows you a breakdown of all bounced, clicked, opened, and unsubscribed data. Should 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 Contacts / Leads Bounced.** 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 Contacts / Leads Clicked.** This report shows the Contacts and Leads who clicked an email.
- **iContact Campaign Contacts / Leads Opened.** This report shows the Contacts and Leads who opened an email.
- **iContact Campaign Contacts / Leads Unsubscribed.** This report shows the Contacts and Leads who unsubscribed from an email.

### iContact Campaign Dashboard folder

By default, the following reports will show you data for this current month, but you can customize the time frame to see the data you need for any time.

- **Click Rate - Messages This Month.** This report shows the click rate for all Campaigns and presents them in a graph for easy comparison.
- **Open Rate - Messages This Month.** This report shows the open rate for all Campaigns and presents them in a graph for easy comparison.
- **Open Rate Per Campaign Created This Month.** This report shows the open rate for all Campaigns created this month and presents them in a graph for easy comparison.
- **Sends Per Month Per Campaign.** This report shows the number of emails you sent for all Campaigns and presents them in a graph for easy comparison.
- **Unsubscribe Rate Per Campaign Created This Month.** This report shows the unsubscribe rate for all Campaigns created this month and presents them in a graph for easy comparison.
- **Unsubscribe Rate - Messages This Month.** This report shows the unsubscribe rate for all Campaigns and presents them in a graph for easy comparison.

### iContact Campaign Reports folder


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

- **Average Click Rate - iContact Campaigns.** 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.
- **Average Open Rate - Monthly Newsletter.** This report shows the average open rate for a fictitious Campaign called “Monthly Newsletter.” After selecting this report, click the magnifying glass to select one of your Campaigns to report on.
- **Average Unsubscribe Rate - Across Messages.** 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.

- **Bounce Rate - All Messages.** 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.
- **Click Rate - All Messages.** 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.
- **Complaint Rate - All Messages.** 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.
- **Open Rate - All Messages.** 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.
- **Return on iContact Sent Messages.** 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 - All Messages.** 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.

## Customizing reports

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

1. Click the **Reports tab**.
2. Select an iContact folder from the list of folders on the left and select a report within the 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 **Customize 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 > Create (under Build) > Report Types**. Click the **Continue button** if necessary.
2. Click **iContact Contact and Lead Message Statistics**.
3. Click the **Clone button**.
4. Give the report a new Report Type Label and Report Type Name, then click **Save**.

### Make 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 clicking the **iContact MessageBuilder tab** or 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](#).

### Most Recent Email widget

This widget displays statistics for the last email you sent, including the email subject; the number of subscribers the email was released to; the open and click rates; bounce,

unsubscribe, and complaint totals; the date and time of the send; and the date and time the send was completed.

### Contact Lists widget

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 structure. Every list name starts with the prefix "SFDC Send" and contains the date and time of the send.

### Social widget

Your bundled iContact account allows you to post directly to Facebook, Twitter, and LinkedIn. For more information about iContact's social media integration features, see [Enable a social media integration](#) and [Post a message to a social media page](#) in the iContact Help Portal.

### Latest iContact News widget

Stay up-to-date with the latest posts from the [iContact Blog](#). Updated regularly, the iContact blog is an excellent resource for marketing insights, iContact tips and tricks, and customer success stories.

### Account Health widget

The Account Health widget helps you gauge the number of emails you sent in the current month, the amount of space you're using in your iContact Image Library, your subscriber count, and also has an Upgrade Your Account button.

The table below provides more information about the components of the Account Health 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.
Image 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, <a href="#">contact iContact for Salesforce</a>

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[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](#).

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#### Subscriber Count

The Subscriber 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 Subscriber Count has absolutely no bearing on your Account Health whatsoever.



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#### 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](#).

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#### **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. But what's in a name? That which we call a rose by any other name would smell as sweet.

## 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.

1. Click the **iContact MessageBuilder** tab.
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.  <b>Edit List.</b> Edit the name of the list, add a description for the list, decide whether or not you’d like notifications for when

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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.

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## 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. Click the **iContact MessageBuilder tab**.
2. Click **Contacts > Add Contacts**.

For more information about adding Campaign Members to a Campaign, see [Chapter 5: Adding Campaign Members](#).

## Browse Contacts

The Browse Contacts page is the easiest way to see detailed information about your lists and the subscribers associated with them.

Access the Browse Contacts page:

1. Click the **iContact MessageBuilder tab**.
2. Click **Contacts > Browse Contacts**.

Every list in your account is accessible from the Limit To List Or Segment drop down. Select a list to see more information about the subscribers on that list including their subscription status.

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 <a href="#">Bounces</a> 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. Click the **iContact MessageBuilder tab**.
2. Click **Contacts > Search Contacts**.

## 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. Click the **iContact MessageBuilder tab**.
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. Sign-up Forms are not integrated into iContact for Salesforce.

Access the Sign-up Forms page:

1. Click the **iContact MessageBuilder tab**.
2. Click **Contacts > Sign-up Forms**.

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.



## Messages

The Messages page loads by default when you click the iContact MessageBuilder tab. Here you'll find the iContact MessageBuilder and MessageCoder editors.

Access the Messages page:

1. Click the **iContact MessageBuilder tab**.

The Messages page has two primary sections: The Editor section at the top and the Draft section (called My Messages) at the bottom.

### The Editor section

You'll find the iContact MessageBuilder and MessageCoder editors in the Editor section. For more information about building emails in iContact, see [Chapter 2: Creating an email](#).

### The Draft section

The Draft section works overtime for iContact for Salesforce customers. In addition to housing all draft 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.

## Pending 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 Pending Messages page:

1. Click the **iContact MessageBuilder tab**.
2. Click **Email > Pending Messages**.

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](#).

## Surveys

Surveys allow standalone iContact customers to poll their contacts with public or private questionnaires. Surveys are not integrated into iContact for Salesforce.

Access the Surveys page:

1. Click the **iContact MessageBuilder tab**.
2. Click **Email > Surveys**.

If you're interested in adding survey functionality to your Salesforce org, we recommend [searching the AppExchange for a solution](#) .

## Autoresponders

Autoresponders allow standalone iContact customers to schedule and automate a series of emails at specified intervals. Autoresponders are not integrated into iContact for Salesforce.

Access the Autoresponders page:

1. Click the **iContact MessageBuilder tab**.
2. Click **Email > Autoresponders**.

The Scheduled Send feature was built for iContact for Salesforce to give you functionality that's similar to autoresponders. If you'd like to send Campaign Members a series of emails at specified intervals, use the Scheduled Send feature in Salesforce, not the Autoresponder feature in iContact. For more information about scheduled sends, see [Chapter 7: Scheduling email](#).

## Image 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. Click the **iContact MessageBuilder tab**.
2. Click **Email > Image 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 in MessageBuilder or MessageCoder.

### Add an image to an email using its public URL

1. Copy the image's public URL.
2. In MessageBuilder or MessageCoder, place your cursor where you want the image to go, then click the **Image tab** on the editor toolbar.
3. Click the **Insert Image button** in the Insert section.
4. Click **From Web**, paste the image's public URL in the search box, then click **Find**.
5. Click the **blue check**.

## Social

Your bundled iContact account can be connected to your Facebook, Twitter, and LinkedIn accounts to help you create, schedule, share, and track your posts and tweets.

The Social tab was not integrated into iContact for Salesforce. In order to use this feature, you must manage lists and subscribers in iContact and you must send email directly from iContact. As an iContact for Salesforce customer, you manage lists and subscribers in Salesforce and you send email from Salesforce.

## Reports

While you should always update 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: Updating statistics](#).

## Last Message

This is a shortcut to the Track My Email Message page for the last email you sent.

Access the Track My Email Message page for the last email you sent:

1. Click the **iContact MessageBuilder tab**.
2. Click **Reports > Last Message**.

The Track My Email Message page has six primary sections: Email Information, Email Impact, Device Usage, Social Engagement, Lists And Segments, and Details.

## Email Information

The Email Information section displays the subject of your email, the date and time of the send, the time it took to complete the send, and the number of Campaign Members the email was sent to.

The number of Campaign Members the email was sent to is usually lower than the number of Campaign Members associated with the Campaign in Salesforce. This is normal. For more information about why there is a difference between these numbers, see [Why doesn't iContact send email to all Campaign Members?](#)

## Email Impact

The Email Impact section shows the percentage of subscribers who opened, clicked, or bounced your email, as well as the subscribers who couldn't be tracked. It also shows the number of subscribers who unsubscribed from your account and the number who registered a complaint about receiving your email.

The table below provides more information about the engagement level of your subscribers and how it's measured by iContact.

Engagement Level	Description
Opened	<p>The number of subscribers who opened your email.</p> <p>iContact can track HTML emails built using MessageBuilder or MessageCoder. Text-only emails can not be tracked.</p> <p>iContact tracks opens using a Web Bug, a 1x1 embedded pixel that's activated when images are downloaded for your email. iContact can also track opens when links are clicked in the email.</p>
Bounced	<p>The number of subscribers who bounced your email.</p> <p>Bounced emails represent unreachable subscribers whose incoming mail server rejected, or bounced, your email. There are a variety of reasons why a subscriber may be unreachable. For example, their server may be down for maintenance, their inbox may no longer exist, or strict anti-spam rules may reject your email based on its content.</p> <p>iContact tracks two kinds of bounces, soft bounces, which</p>

	are temporary, and hard bounces, which are permanent. For more information about bounces, see <a href="#">Bounces</a> in the iContact Help Portal.
No Info	<p>The number of untrackable subscribers.</p> <p>This category includes subscribers who didn't open your email as well as those who opened it in an untrackable way. For example, they opened the email but didn't download images (and our tracking pixel), they didn't click a link, or their server was muted by an administrator to prevent it from alerting us of the open. For more information about subscribers designated as No Info, see <a href="#">Why is there "No Info" for so many people?</a></p>
Clicked	<p>The number of subscribers who clicked a link in your email.</p> <p>iContact link tracking code is automatically added to each link when email is sent, provided that this setting wasn't turned off on the Sender Property associated with this send. For more information about Sender Properties, see <a href="#">Sender Properties</a>.</p>
Unsubscribed	The number of subscribers who unsubscribed from your account.
Complained	<p>The number of subscribers who marked your email as spam.</p> <p>Subscribers who mark an email as spam are automatically unsubscribed from your account.</p>

### Device Usage

The Device Usage section shows you which devices your contacts used when they opened your email: Smartphone, Tablet, or Computer.

### Social Engagement

Standalone iContact customers can post directly to social media when they send email. That feature was not integrated into iContact for Salesforce, so this section will always be empty.

## Lists And Segments

This section displays the name of the list your email was sent to. iContact for Salesforce lists are designated by a special naming structure. Every list name starts with the prefix “SFDC Send” and contains the date and time of the send.

## Details

The Details section is accessible after clicking the **View Details button**. The Details section contains an itemized list of subscribers in the click, open, no info, unsubscribe, and bounce statuses.

## 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. Click the **iContact MessageBuilder tab**.
2. Click **Reports > Sent Messages**.

## Surveys

The Surveys page under the Reports tab allows standalone iContact customers to track the results of their surveys.

Access the Surveys page under the Reports tab:

1. Click the **iContact MessageBuilder tab**.
2. Click **Reports > Surveys**.

Surveys are not integrated into iContact for Salesforce. If you're interested in adding survey functionality to your Salesforce org, we recommend [searching the AppExchange for a solution](#) .

## Autoresponders

The Autoresponders page under the Reports tab allows standalone iContact customers to track the email statistics for their autoresponders.

Access the Autoresponders page under the Reports tab:

1. Click the **iContact MessageBuilder tab**.
2. Click **Reports > Autoresponders**.

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](#).

## Tracking Dashboard

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

Access the Tracking Dashboard:

1. Click the **iContact MessageBuilder tab**.
2. Click **Reports > Tracking 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 update 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. Click the **iContact MessageBuilder tab**.
2. Click **Account drop down > 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.

**Warning:** Never update the iContact account password without also updating the iContact API password that links your iContact account to your Salesforce account. For information about updating your iContact account and iContact API password, see [iContact login 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. Click the **iContact MessageBuilder tab**.
2. Click **Account drop down > 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. Click the **iContact MessageBuilder tab**.
2. Click **Account drop down > 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. Click the **iContact MessageBuilder tab**.
2. Click **Account drop down > 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, Twitter, and LinkedIn accounts, as well as your Social Media Sharebar.

1. Click the **iContact MessageBuilder tab**.
2. Click **Account drop down > 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. Click the **iContact MessageBuilder tab**.
2. Click **Account drop down > 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 the **iContact MessageBuilder tab**.
2. Click **Account drop down > Custom Fields**. The Account drop down displays your name or a colleague's name.

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](mailto:sales@icontact.com).

iContact Sales hours are Monday - Friday, 9 a.m. - 6 p.m. EST.

# B

## Frequently-asked questions

You've got questions. We've got answers.

### **Can I embed video in my email?**

No. 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 update 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 updating 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 or 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?**

Subscribers 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” subscribers 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 > Create (under Build) > Objects > iContact Message Statistic**.
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 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 Layout is checked, then click **Save**.

## Add the field to the list

1. Click **Setup > Create (under Build) > Objects > iContact Sent Message**.
2. Click the **Page Layouts link** at the top of the page and click **Edit** next to 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

Creating an iContact for Salesforce Permission Set lets you assign iContact for Salesforce permissions to other users on-the-fly without making changes to their profile.

**Note:** You may not use all of the following objects or fields but they're all required for iContact for Salesforce to work.

## Create the iContact for Salesforce Permission Set and assign the iContact for Salesforce app to it

1. Click **Setup > Manage Users (under Administer) > Permission Sets**.
2. Click the **New button**.
3. In the label field, type **iContact for Salesforce**, then click **Save**.
4. In the Apps section, click **Assigned Apps**, then click the **Edit button**.
5. Move the **iContactforSF.iContact Email Marketing app** from the Available Apps section on the left to the Enabled Apps section on the right, then click **Save**.

## Add Campaign object permissions

1. Click the **More button** next to Assigned Apps and select **Object Settings**.
2. Click **Campaigns**, then click the **Edit button**.
3. In the Campaign: Record Type Assignments section, check **iContact for Salesforce**.
4. In the Object Permissions section, check **Read**, **Create**, and **Edit**, then click **Save**.

## Add Contact and Lead object and field permissions

1. Click the **More button** next to Campaigns, select **Contacts**, then click the **Edit button**.
2. In the Object Permissions section, check **Read**, **Create**, and **Edit**.
3. In the Field Permissions section, check **Read Access** and **Edit Access** for the following fields, then click **Save**:
  - Email
  - Email Opt Out
  - Fax
  - iContact Contact ID
  - Mailing Address (for Contacts) / Address (for Leads)
  - Name



- Phone
4. Repeat from Step 1, this time selecting **Leads**.

### Add the iContact Clicked Links, iContact Global Statistics, and iContact Message Statistics permissions

1. Click the **More button** next to Leads, select **iContact Clicked Links**, then click the **Edit button**.
2. In the Object Permissions section, check **Read** and **Create**, then click **Save**.
3. Repeat from Step 1 for the **iContact Global Statistics** and **iContact Message Statistics** objects.

### Enable the iContact for Salesforce Visualforce pages

1. Click the **More button** next to Object Settings and select **Visualforce Page Access**, then click the **Edit button**.
2. Move every Visualforce page that starts with the prefix **iContactforSF** from the Available Visualforce Pages section on the left to the Enabled Visualforce Pages section on the right, then click **Save**.

### Assign the iContact for Salesforce Permission Set and check the Marketing User box for the new iContact for Salesforce users

1. Click **Setup > Manage Users (under Administer) > Users**.
2. Locate the user you want to assign the permission set to and click **his or her name**.
3. Click the **Edit Assignments button** in the Permission Set Assignments section.
4. Move the **iContact for Salesforce** permission set from the Available Permission Sets section on the left to the Enabled Permission Sets section on the right, then click **Save**.
5. Click the **Edit button**, check the **Marketing User box**, then click **Save**.

# Delete iContact Message Statistics data

The primary benefit of iContact for Salesforce is the email statistics we bring into your org. If you don't have an unlimited data storage plan with Salesforce, your statistics will eventually consume your available space. If you decide not to upgrade your data storage plan, then you can follow this tutorial to delete old data.

**Warning:** The iContact for Salesforce Support team has not been trained to remove data from your org or to troubleshoot any issues that may come up during the process.

## Enterprise or Unlimited edition

If you're using Salesforce Enterprise or Unlimited edition, you can use Data Loader to delete iContact Message Statistics data.

1. Click **Setup > Data Management (under Administer) > Data Loader**.
2. Target the data on the iContactforSF\_\_iContact\_Message\_Statistic\_\_c object.

**Note:** Please consult the [Salesforce Data Loader User Guide](#) or partner with Salesforce Support if you need help with Data Loader. They can be reached at 1 (800) 667-6389, online at [help.salesforce.com](https://help.salesforce.com), or by email at [supportresponse@salesforce.com](mailto:supportresponse@salesforce.com).

## Professional edition

If you're using Salesforce Professional edition, please [search the AppExchange](#) for a solution. Many customers have had success with [dataloader.io](#) and [Jitterbit](#).

**Note:** For help with third-party tools, please reach out to that company through their provided support channels.

## Using iContact for Salesforce after you delete data

Deleting data may affect the aggregated stats that are displayed on the dashboards for Campaigns and individual emails, but there are no other downsides to deleting data.

To help keep your data under control moving forward, we recommend cleaning up statistics regularly, strategically updating statistics at the email level, using iContact for Salesforce Lite, or upgrading your data storage with Salesforce.

### Strategically updating statistics at the email level

Strategically updating statistics means clicking the Update Statistics button only on the specific emails you're interested in. By contrast, clicking the Update Statistics button for a Campaign will update statistics for every email sent to that Campaign, including the emails that may not be mission-critical.

### Using iContact for Salesforce Lite

When using iContact for Salesforce Lite, we will not store stats for individual Contacts or Leads in Salesforce. You will not run out of data storage as quickly as before but you will lose the ability to see which individuals are opening and clicking, to run reports on individual Contacts or Leads, and to send Targeted Sends. What's more, emails sent using iContact for Salesforce Lite can not retrieve individual stats later if iContact for Salesforce Lite is turned off.

### Turn on iContact for Salesforce Lite

1. Click the **+** tab for all tabs.
2. Click **iContact Configuration** – the singular option with our logo.
3. Click the **Edit button**.
4. In the Configure section at the top of the page, check the **Enable Lite Version box**.
5. Click **Save**.

iContact for Salesforce Lite prevents iContact for Salesforce from storing individual stats in your org, but your bundled iContact account will continue to track and store that data. You can always log in to your bundled iContact account to see the data you're missing in Salesforce.

### See stats in your bundled iContact account

1. Click the **iContact MessageBuilder tab** or [log in to iContact directly](#) .
2. In iContact, click **Reports > Sent Messages**.

## Customizing the Campaign Page layout after deleting data

Finally, use caution when clicking the Update Statistics button on the Campaign page. If you update stats for a Campaign you already cleaned up, all the stats you deleted will be loaded back into Salesforce.

### Remove the Update Statistics button from the Campaign page

1. Click **Setup > Customize (under Build) > Campaigns > Page Layouts**.
2. Click **Edit** on the left side of the iContact Campaign Layout.
3. In the purple and gray box, click **Buttons**.
4. Drag the Update Statistics button from the Campaign Detail section and drop it into the Buttons section in the purple and gray box, then click **Save**.

# 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]	<b>NOT SUPPORTED</b>	<b>NOT SUPPORTED</b>
[business]	<b>NOT SUPPORTED</b>	{!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]	<b>NOT SUPPORTED</b>	<b>NOT SUPPORTED</b>
[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

## Salesforce Contact merge fields

The following is a list of standard and default custom Contact merge fields. For more information about creating your own custom fields, see [Create a custom field in Salesforce](#) in the iContact Help Portal.

### Standard Contact merge fields

{!Contact.AssistantName}  
 {!Contact.AssistantPhone}  
 {!Contact.CreatedBy}  
 {!Contact.CreatedById}  
 {!Contact.Department}  
 {!Contact.Email}  
 {!Contact.Fax}

{!Contact.FirstName}  
{!Contact.HomePhone}  
{!Contact.LastModifiedBy}  
{!Contact.LastModifiedById}  
{!Contact.LastName}  
{!Contact.LeadSource}  
{!Contact.MailingCity}  
{!Contact.MailingCountry}  
{!Contact.MailingPostalCode}  
{!Contact.MailingState}  
{!Contact.MailingStreet}  
{!Contact.MobilePhone}  
{!Contact.Name}  
{!Contact.OtherCity}  
{!Contact.OtherCountry}  
{!Contact.OtherPhone}  
{!Contact.OtherPostalCode}  
{!Contact.OtherState}  
{!Contact.OtherStreet}  
{!Contact.OwnerId}  
{!Contact.OwnerFullName}  
{!Contact.Owner}  
{!Contact.OwnerEmail}  
{!Contact.OwnerFirstName}  
{!Contact.OwnerId}  
{!Contact.OwnerLastName}  
{!Contact.OwnerPhone}  
{!Contact.OwnerTitle}  
{!Contact.Phone}  
{!Contact.Salutation}  
{!Contact.Title}

#### **Default custom Contact merge fields**

{!Contact.iContact\_Contact\_Id\_\_c}  
{!Contact.Languages\_\_c}  
{!Contact.Level\_\_c}

## Salesforce Lead merge fields

The following is a list of standard and default custom Lead merge fields.

### Standard Lead merge fields

{!Lead.AnnualRevenue}  
{!Lead.City}  
{!Lead.Company}  
{!Lead.Country}  
{!Lead.CreatedBy}  
{!Lead.CreatedById}  
{!Lead.Email}  
{!Lead.Fax}  
{!Lead.FirstName}  
{!Lead.Industry}  
{!Lead.LastModifiedBy}  
{!Lead.LastModifiedById}  
{!Lead.LastName}  
{!Lead.LeadSource}  
{!Lead.Name}  
{!Lead.NumberOfEmployees}  
{!Lead.Owner}  
{!Lead.OwnerEmail}  
{!Lead.OwnerFirstName}  
{!Lead.OwnerFullName}  
{!Lead.OwnerId}  
{!Lead.OwnerLastName}  
{!Lead.OwnerPhone}  
{!Lead.OwnerTitle}  
{!Lead.Phone}  
{!Lead.PostalCode}  
{!Lead.Rating}  
{!Lead.Salutation}  
{!Lead.State}  
{!Lead.Status}  
{!Lead.Street}  
{!Lead.Title}  
{!Lead.Website}



### Default custom Lead merge fields

{!Lead.CurrentGenerators\_\_c}  
{!Lead.iContact\_Contact\_Id\_\_c}  
{!Lead.Lead\_Help\_System\_\_c}  
{!Lead.NumberofLocations\_\_c}  
{!Lead.Primary\_\_c}  
{!Lead.ProductInterest\_\_c}  
{!Lead.Secondary\_\_c}  
{!Lead.SICCode\_\_c}

### Salesforce Campaign merge fields

The following is a list of standard and default custom Campaign merge fields.

#### Standard Campaign merge fields

{!Campaign.ActualCost}  
{!Campaign.AmountAllOpportunities}  
{!Campaign.AmountWonOpportunities}  
{!Campaign.BudgetedCost}  
{!Campaign.CreatedBy}  
{!Campaign.CreatedById}  
{!Campaign.ExpectedRevenue}  
{!Campaign.Id}  
{!Campaign.IsActive}  
{!Campaign.LastModifiedBy}  
{!Campaign.LastModifiedById}  
{!Campaign.Name}  
{!Campaign.NumberOfContacts}  
{!Campaign.NumberOfConvertedLeads}  
{!Campaign.NumberOfLeads}  
{!Campaign.NumberOfOpportunities}  
{!Campaign.NumberOfResponses}  
{!Campaign.NumberOfWonOpportunities}  
{!Campaign.NumberSent}  
{!Campaign.OwnerId}  
{!Campaign.RecordTypeId}  
{!Campaign.Status}  
{!Campaign.Type}

### Default custom Campaign merge fields

{!Campaign.Average\_Bounce\_Rate\_\_c}  
{!Campaign.Average\_Click\_Rate\_\_c}  
{!Campaign.Average\_Open\_Rate\_\_c}  
{!Campaign.Average\_Unsubscribe\_Rate\_\_c}  
{!Campaign.Bounce\_Rate\_Warning\_Threshold\_1\_\_c}  
{!Campaign.Bounce\_Rate\_Warning\_Threshold\_2\_\_c}  
{!Campaign.Click\_Rate\_Success\_Threshold\_1\_\_c}  
{!Campaign.Click\_Rate\_Success\_Threshold\_2\_\_c}  
{!Campaign.Message\_Statistic\_Count\_\_c}  
{!Campaign.Open\_Rate\_Success\_Threshold\_1\_\_c}  
{!Campaign.Open\_Rate\_Success\_Threshold\_2\_\_c}  
{!Campaign.Total\_Bounce\_Rate\_\_c}  
{!Campaign.Total\_Click\_Rate\_\_c}  
{!Campaign.Total\_Open\_Rate\_\_c}  
{!Campaign.Total\_Unsubscribe\_Rate\_\_c}  
{!Campaign.Unsubscribe\_Rate\_Warning\_Threshold\_1\_\_c}  
{!Campaign.Unsubscribe\_Rate\_Warning\_Threshold\_2\_\_c}

### Salesforce Organization merge fields

The following is a list of standard Organization merge fields.

#### Standard Organization merge fields

{!Organization.ComplianceBccEmail}  
{!Organization.Country}  
{!Organization.DefaultCalendarAccess}  
{!Organization.DefaultCampaignAccess}  
{!Organization.DefaultCaseAccess}  
{!Organization.DefaultContactAccess}  
{!Organization.DefaultLeadAccess}  
{!Organization.DefaultLocaleSidKey}  
{!Organization.DefaultOpportunityAccess}  
{!Organization.Division}  
{!Organization.Fax}  
{!Organization.FiscalYearStartMonth}  
{!Organization.Id}  
{!Organization.LanguageLocaleKey}  
{!Organization.Name}  
{!Organization.OrganizationType}  
{!Organization.Phone}

{!Organization.PostalCode}  
{!Organization.PreferencesRequireOpportunityProducts}  
{!Organization.PrimaryContact}  
{!Organization.ReceivesAdminInfoEmails}  
{!Organization.ReceivesInfoEmails}  
{!Organization.Street}  
{!Organization.UiSkin}  
{!Organization.WebToCaseDefaultOrigin}

## Salesforce Account merge fields

The following is a list of standard and default custom Account merge fields.

### Standard Account merge fields

{!Account.AccountNumber}  
{!Account.AnnualRevenue}  
{!Account.BillingCity}  
{!Account.BillingCountry}  
{!Account.BillingPostalCode}  
{!Account.BillingState}  
{!Account.BillingStreet}  
{!Account.CreatedBy}  
{!Account.CreatedById}  
{!Account.Fax}  
{!Account.Id}  
{!Account.Industry}  
{!Account.LastModifiedBy}  
{!Account.LastModifiedById}  
{!Account.Name}  
{!Account.NumberOfEmployees}  
{!Account.Owner}  
{!Account.OwnerEmail}  
{!Account.OwnerFirstName}  
{!Account.OwnerFullName}  
{!Account.OwnerId}  
{!Account.OwnerLastName}  
{!Account.OwnerPhone}  
{!Account.Ownership}  
{!Account.OwnerTitle}  
{!Account.Parent}  
{!Account.ParentId}  
{!Account.Phone}

{!Account.Rating}  
{!Account.ShippingCity}  
{!Account.ShippingCountry}  
{!Account.ShippingPostalCode}  
{!Account.ShippingState}  
{!Account.ShippingStreet}  
{!Account.Sic}  
{!Account.Site}  
{!Account.TickerSymbol}  
{!Account.Type}  
{!Account.Website}

### Default custom Account merge fields

{!Account.Active\_\_c}  
{!Account.CustomerPriority\_\_c}  
{!Account.NumberofLocations\_\_c}  
{!Account.SLA\_\_c}  
{!Account.SLASerialNumber\_\_c}  
{!Account.UpsellOpportunity\_\_c}

### Salesforce User merge fields

The following is a list of standard User merge fields.

#### Standard User merge fields

{!User.Alias}  
{!User.City}  
{!User.CommunityNickname}  
{!User.CompanyName}  
{!User.Contact}  
{!User.ContactId}  
{!User.Country}  
{!User.Department}  
{!User.Division}  
{!User.Email}  
{!User.EmployeeNumber}  
{!User.Extension}  
{!User.Fax}  
{!User.FirstName}  
{!User.Id}  
{!User.IsActive}  
{!User.LastName}

{!User.Manager}  
{!User.ManagerId}  
{!User.MobilePhone}  
{!User.Name}  
{!User.Phone}  
{!User.PostalCode}  
{!User.Profile}  
{!User.ProfileId}  
{!User.State}  
{!User.Street}  
{!User.Title}  
{!User.Username}

## 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.

**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.

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.

# 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. Update statistics. For more information about updating statistics, see [Chapter 9: Updating statistics](#).
2. Click the **Reports tab**.
3. Click the **iContact Campaign Contacts / Leads folder** on the left and click the **iContact Campaign Contacts / Leads Clicked report** on the right.
4. Click the **Customize 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. Update statistics. For more information about updating statistics, see [Chapter 9: Updating statistics](#).
2. Click the **Reports tab**.
3. Click the **iContact Campaign Contacts / Leads folder** on the left and click the **iContact Campaign Contacts / Leads Opened report** on the right.
4. Click the **Customize 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 Contacts and Leads who received a specific email

If your Campaigns are routinely in a state of flux, you could run this report to see which Contacts and Leads received a specific email.

1. Update statistics. For more information about updating statistics, see [Chapter 9: Updating statistics](#).
2. Click the **Reports tab**.
3. Click the **iContact Campaign Contacts / Leads folder** on the left and click the **iContact Campaign Contacts and Leads report** on the right.
4. Click the **Hide Details button**, check the box next to the Campaign you're interested in, then click the **Drill Down button** at the bottom of the page.
5. Click the **Show Details button**
6. Click the **Customize button**.
7. In the Filters section, click the **triangle** on the Add button and select **Field Filter**.
8. Type **Subject** in the first drop down and click **iContact Sent Message: Message Subject** (under iContact Message Statistics).
9. Change the operator to **Equals**.
10. Type the subject of the email you're interested in into the text field, then click **Ok**.
11. Click the **Save button**, give the report a name, then click the **Save And Run Report button**.

# 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.

1. Update statistics. For more information about updating statistics, see [Chapter 9: Updating statistics](#).
2. Click the **Reports Tab > New Report button**.
3. Click **Campaigns > Campaigns with Leads and Converted Lead Information > Create button**.
4. In the Filter section, change the Show drop down to **All Campaigns**.
5. Click the **Add button**.
6. Change the Campaign Name drop down to **Converted** (in the Lead: General section).
7. Set the operator to **Equals**.
8. Click the **Magnifying Glass icon** and click **True > Insert Selected > Ok**.
9. Drag the **Primary Campaign Source field** from the Fields section on the left and drop it into the Preview section on the right.
10. 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. In addition to seeing a list of emails sent to each Campaign, you could run this report with the Total Value Opportunities field to measure the value of the opportunities associated with the Campaign, with the Click Rate field to see the click rate percentage of each email, and so much more.

1. Update statistics. For more information about updating statistics, see [Chapter 9: Updating statistics](#).
2. Click **Setup > Create (under Build) > Report Types**. Click the **Continue button** if necessary.
3. Click the **Campaigns with iContact Sent Messages with iContact Message Statistics label**.
4. Click the **Clone button**.
5. Give the report a new Report Type Label and Report Type Name, then click **Save**.
6. In the Object Relationships section, click the **Edit button**.
7. Click **(Click to relate another object)** and select **iContact Clicked Links** from the drop down, then click **Save**.
8. Click the **Reports tab > New Report button**.
9. Open the **Campaigns folder > Click the report type you created > Create button**.
10. In the Filters section, click the **Magnifying Glass icon** and select the Campaign you're interested in.
11. Drag the fields you need from the Fields section on the left and drop them into the Preview section on the right.
12. 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. Update statistics. For more information about updating statistics, see [Chapter 9: Updating statistics](#).
2. Click the **Reports tab**.
3. Click the **iContact Campaign Contacts / Leads folder** on the left and click the **iContact Campaign Contacts / Leads Opened report** on the right.
4. Click the **Hide Details button**, check the box next to the Campaign you're interested in, then click the **Drill Down button** at the bottom of the page.
5. Click the **Show Details button**
6. Click the **Customize button**.
7. In the Filters section, click the **triangle** on the Add button and select **Field Filter**.
8. Type **Subject** in the first drop down and click **iContact Sent Message: Message Subject** (under iContact Message Statistics).
9. Change the operator to **Equals**.
10. Type the subject of the email you're interested in into the text field, then click **Ok**.
11. Click the **Save button**, give the report a name, then click the **Save And Run Report button**.

# Uninstall iContact for Salesforce

**Note:** You must be a Salesforce System Administrator to uninstall iContact for Salesforce.

**Warning:** Uninstalling iContact for Salesforce will delete all iContact for Salesforce Message Statistics data. Export and archive the data from your Salesforce account or from your bundled iContact account before uninstalling iContact for Salesforce.

1. Click **Setup > Customize (under Build) > Campaigns > Page Layouts > Page Layout Assignment > Edit Assignment**.
2. If the iContact for Salesforce record type is listed, click **iContact for Salesforce**, select **Campaign Layout** from the Page Layout To Use drop down, then click **Save**. If the iContact for Salesforce record type isn't available, skip this step.
3. If you have Salesforce Professional edition, click **Setup > (Customize under Build) > Campaigns > Page Layouts**. Click **Edit** next to the Campaign Layout. Remove the **iContact buttons**, **iContact Campaign Dashboard**, and **iContact Custom Links** from the page layout. If you don't have Salesforce Professional edition, skip this step.
4. Click **Setup > Communication Templates (under Administer) > Email Templates**.
5. Select the **iContact Templates folder** from the Folder drop down, then click the **Edit link** next to the drop down.
6. Move the folder's templates from the Email Templates In This Folder section on the right to the Unfiled Public Email Templates section on the left, then click **Save**.
7. Click **Setup > Installed Packages (under Build) > Uninstall (next to iContact for Salesforce)**.
8. At the bottom of the page, decide whether or not you want to save a copy of the iContact for Salesforce package after you uninstall, check **Yes, I want to uninstall this package and permanently delete all associated components** to confirm you want to uninstall iContact for Salesforce, then click **Uninstall**.

**Note:** These are the steps to uninstall iContact for Salesforce for most orgs. If your org or installation of iContact for Salesforce is customized, then you may need additional steps to uninstall. Salesforce may provide you with a list of components that are using iContact for Salesforce. If you see this list, navigate to the components Salesforce lists in the Components column, follow the instructions in the Problems column, then uninstall.

# Whitelisting iContact and updating your Sender Policy Framework (SPF) record

If your email is being delivered to your spam or junk folder or if it's not being delivered at all, then we recommend whitelisting iContact and updating your SPF record. Whitelisting iContact approves the email we send for delivery on your incoming mail servers and updating your SPF record gives iContact permission to send email on behalf of your outgoing mail servers. Additionally, updating your SPF record has the added bonus of improving email deliverability for your subscribers.

**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 -- but an email's final destination is up to the receiving incoming mail server and its anti-spam settings. Whitelisting iContact and updating your SPF record will improve your inbox deliverability chances, but it will not guarantee inbox delivery.

iContact for Salesforce Support has not been trained to whitelist domains, to update your SPF record, or to troubleshoot problems with those tasks because doing so requires making changes to your domain's DNS settings and incoming mail server settings. Please partner with an experienced IT Administrator and proceed with caution.

## Whitelist the following domains

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

## Recommended SPF record

```
v=spf1 a mx include:icpbounce.com ~all
```

**Note:** If you're unable to define an SPF record with a domain, please [contact Support](#) for a list of IP addresses associated with your account.

# 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:** System.NullPointerException: Attempt to de-reference a null object (Visualforce error).

**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 iContact Send button

The error occurs when clicking the Send To Campaign Members button

The Visualforce error occurs when clicking the Send To Campaign Members button

The error occurs when clicking the Update Statistics button

---

## The error occurs when clicking the iContact Send button

This error is generated if the iContact Configurations page (plural), not the iContact Configuration page (singular), is configured; if the endpoint URL on the iContact Configuration page is incorrect; or if the API connection falls out of sync.

## Remove the configuration from the iContact Configurations page

1. Click the **+ tab** for all tabs.
2. Click **iContact Configurations** – the plural option with the computer icon.
3. Click the iContact configuration.
4. Copy the data in the Username, API Password, API AppID, Endpoint URL, Account ID, and Client Folder ID fields and paste it into another document like Notepad or Word or Pages. You'll need them again in the next section.
5. Click the **Delete button**.

## Configure the iContact Configuration page and sync the API connection

1. Click the **+ tab** for all tabs.
2. Click **iContact Configuration** – the singular option with our logo.



3. Click the **Edit button**.
  4. Using the data you copied, complete the fields in the iContact API Connection section, then click **Save**.
  5. In the Salesforce API Connection section, **log in with your Salesforce System Administrator username and password**.
- 

## 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](mailto:salesforce@icontact.com). We're available Monday – Friday, 9 a.m. – 6 p.m. Eastern Time.

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## The Visualforce error occurs when clicking the Send To Campaign Members button

This error is generated when the user's Profile doesn't have the required Visualforce pages associated with it or if the user is trying to send the email without enabling mixed content in Internet Explorer 9.

### Assign the required Visualforce pages to the user's Profile

1. Click **Setup > Manage Users (under Administer) > Users**.
2. Locate the user's name, click the name, then click the **Profile link**.
3. Click the **Enabled Visualforce Page Access link** at the top of the page, then click **Edit**.
4. Enable every Visualforce page that starts with the **iContactforSF prefix**, then click **Save**.
5. Click the **+ tab** for all tabs.
6. Click **iContact Configuration** – the singular option with our logo.
7. In the Salesforce API Connection section, **log in with your Salesforce System Administrator username and password**.

### 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 Update 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 update statistics.

### Sync the API connection

1. Click the **+ tab** for all tabs.
2. Click **iContact Configuration** – the singular option with our logo.
3. In the Salesforce API Connection section, **log in with your Salesforce System Administrator username and password.**

### Check the permissions for the user's profile

1. Click **Setup > Manage Users (under Administer) > 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 is stuck as “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. Click the **iContact MessageBuilder tab** or [log in to iContact directly](#).
2. In iContact, click **Reports > Sent Messages**. If the email is listed on the Track Sent Messages page, then it was sent. If the email is not listed, then it was not sent.

## If the email was sent, update the email status in Salesforce

1. Click the **Campaigns tab**.
2. Click the Campaign that contains the email that’s stuck.
3. Click the **iContact Sent Messages link**.
4. Click the **Edit link** next to the email that’s stuck.
5. Change the Status to **Released**.
6. Click **Save**.

If the email was not sent, 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](mailto: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.

## Select your scenario

[I'm using Salesforce Enterprise or Unlimited edition](#)

[I'm using Salesforce Professional or Professional Plus edition](#)

---

## Salesforce Enterprise or Unlimited edition

This error is generated when one or more fields required by iContact for Salesforce are hidden or inaccessible.

### Configure the field accessibility for the Contact and Lead objects

1. Click **Setup > Security Controls (under Administer) > Field Accessibility > Contact**.
2. Click **View By Profiles** and select the **System Administrator Profile** from the drop down.
3. Check that the Field Access for the fields listed below is **Editable** or **Required**. If not, click **Hidden**. In the Field-Level Security section, set the **Profile** to **Visible**; in the Page Layout section, set the **Page Layout** to **Visible**; then click **Save**.
  - Email
  - Email Opt Out
  - Fax
  - iContact Contact ID
  - Mailing Address (for Contacts) / Address (for Leads)
  - Name
  - Phone

**Note:** You may not use all of these fields, but they're all required for iContact for Salesforce to work.

4. Repeat Steps 2 - 3 for the Marketing User profile as well as any other profiles that have access to iContact for Salesforce.
  5. Click **Field Accessibility > Lead** and repeat Steps 2 - 4 for the Lead object.
- 

## Salesforce Professional or Professional Plus edition

This error is generated when one or more fields required by iContact for Salesforce is not associated with an iContact for Salesforce page layout or is hidden or inaccessible.

### Configure the Contact and Lead page layout

1. Click **Setup > Customize (under Build) > Contacts > Page Layout**.
2. In the purple and gray box, click **Fields**.
3. Drag and drop the fields listed below onto the Contact Page Layout:
  - Email
  - Email Opt Out
  - Fax
  - iContact Contact ID
  - Mailing Address (for Contacts) / Address (for Leads)
  - Name
  - Phone

**Note:** You may not use all of these fields, but they're all required for iContact for Salesforce to work.

4. After adding the **iContact Contact ID field**, mouse over it and click the **wrench icon**, check the **Read-Only box**, then click **Ok**.
5. In the purple and gray box, click **Related Lists**.
6. Drag and drop the **iContact Message Statistic** and **iContact Clicked Links** lists onto the Contact Page Layout.
7. Click the **wrench icon** on the iContact Message Statistic list. Move the following fields from the Available Fields on the left to the Selected Fields on the right:
  - Recipient Name
  - Campaign
  - iContact Sent Message
  - Total Opens
  - Total Clicks
  - Bounced Date
  - Unsubscribed Date

- Created Date
8. Change the Sort By drop down to **Created Date** and select the **Descending** option.
  9. Expand the purple Buttons section and uncheck the **New box**, then click **Ok**.
  10. Click the **wrench icon** on the iContact Clicked Links list. Move the following fields from the Available Fields on the left to the Selected Fields on the right:
    - Link
    - Full Link
    - Clicks
    - Unique Clicks
    - Created Date
  11. Change the Sort By drop down to Created Date and select the Descending option.
  12. Expand the purple Buttons section and uncheck the **New box**, click **Ok**, then click **Save** on the purple and gray box at the top of the page.
  13. Repeat this section from Step 1 for the Lead Page Layout, click **Setup > Customize (under Build) > Leads > Page Layout**.

**Note:** Even if you don't use both the Contact and Lead objects, they're both required for iContact for Salesforce to work.

### Configure the iContact Sent Message and iContact Message Statistic page layouts

1. Click **Setup > Create (under Build) > Objects > iContact Sent Message**.
2. In the Page Layouts section, click the **Edit link** next to iContact Sent Message Layout.
3. In the purple and gray box, click **Fields**.
4. Drag and drop the following fields onto the Page Layout:
  - Comments
  - iContact Asynchronous Send ID
  - iContact Campaign ID
  - iContact Message ID
  - iContact Send ID
  - IdString
  - Status Summary
5. In the purple and gray box, click **Save**.
6. Click **Setup > Create (under Build) > Objects > iContact Message Statistic**.
7. In the Page Layouts section, click the **Edit link** next to iContact Message Statistic Layout.

8. In the purple and gray box, click **Fields**.
9. Drag and drop the following field onto the Page Layout:
  - iContact Contact ID
10. In the purple and gray box, click **Save**.

### Configure the field accessibility for the Contact and Lead objects

1. Click **Setup > Security Controls (under Administer) > Field Accessibility > Contact**.
2. Click **View By Profiles** and select the **System Administrator Profile** from the drop down.
3. Check that the Field Access for the fields listed below is **Editable** or **Required**. If not, click **Hidden**. In the Field-Level Security section, set the **Profile** to **Visible**; in the Page Layout section, set the **Page Layout** to **Visible**; then click **Save**.
  - Email
  - Email Opt Out
  - Fax
  - iContact Contact ID
  - Mailing Address (for Contacts) / Address (for Leads)
  - Name
  - Phone

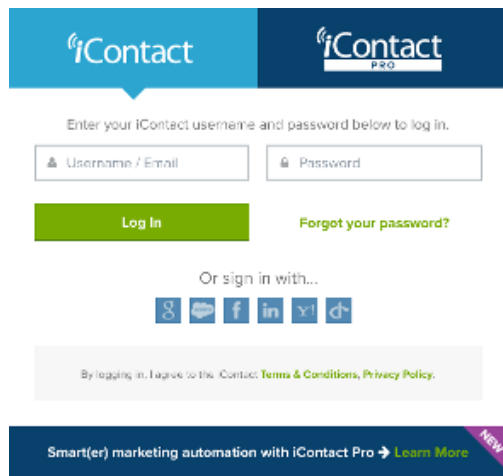
**Note:** You may not use all of these fields, but they're all required for iContact for Salesforce to work.

4. Repeat Steps 2 - 3 for the Marketing User profile as well as any other profiles that have access to iContact for Salesforce.
5. Click **Field Accessibility > Lead** and repeat Steps 2 - 4 for the Lead object.

# iContact login page

iContact for Salesforce is designed to seamlessly log you in to your bundled iContact account whenever you click the iContact MessageBuilder tab or the iContact Configuration tab. We're able to do this if your iContact account password matches your iContact API password. If you ever encounter an iContact login screen, someone changed the iContact account password without updating the iContact API password to match.

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



Enter your iContact username and password below to log in.

Username / Email Password

Log In Forgot your password?

Or sign in with...

By logging in, I agree to the iContact: [Terms & Conditions](#), [Privacy Policy](#).

Smart(er) marketing automation with iContact Pro → [Learn More](#)

## 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 Appld.**
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 **+ tab** for all tabs.
3. Click **iContact Configuration** – the singular option with our logo.
4. Click the **Edit button**.
5. Update the API Password box with your preferred password, then click **Save**.
6. In the Salesforce API Connection section, **log in with your Salesforce System Administrator username and password.**

# Insufficient access / privileges

**Error:** Insufficient Access.

**Error:** Insufficient Privileges.

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

1. Click **Setup > Manage Users (under Administer) > 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.

---

## Set Your Salesforce Credentials

Username

Password

Re-enter Password

Custom Domain

---

## Sync the API connection

1. Click the **+ tab** for all tabs.
2. Click **iContact Configuration** – the singular option with our logo.
3. In the Salesforce API Connection section, **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.

## Select your scenario

The error occurs when clicking the iContact Send button

The error occurs when clicking the Send To Campaign Members button

---

## The error occurs when clicking the iContact Send button

This error is generated if the iContact Configurations page (plural), not the iContact Configuration page (singular), is configured.

### Remove the configuration from the iContact Configurations page

1. Click the **+ tab** for all tabs.
2. Click **iContact Configurations** – the plural option with the computer icon.
3. Click the iContact configuration.
4. Copy the data in the Username, API Password, API AppID, Endpoint URL, Account ID, and Client Folder ID fields and paste it into another document like Notepad or Word or Pages. You'll need them again in the next section.
5. Click the **Delete button**.

### Configure the iContact Configuration page and sync the API connection

1. Click the **+ tab** for all tabs.
  2. Click **iContact Configuration** – the singular option with our logo.
  3. Click the **Edit button**.
  4. Using the data you copied, complete the fields in the iContact API Connection section, then click **Save**.
  5. In the Salesforce API Connection section, **log in with your Salesforce System Administrator username and password**.
-

## 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](mailto: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: 0

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

## Select your scenario

The error occurs when clicking the iContact Send button

The error occurs when clicking the Send To Campaign Members button

---

## The error occurs when clicking the iContact Send button

This error is generated if the iContact Configurations page (plural), not the iContact Configuration page (singular), is configured; if the default email folder doesn't contain at least one template that was made available for use; or if the email folder you're trying to access is managed by group sharing rules.

## Remove the configuration from the iContact Configurations page

1. Click the **+ tab** for all tabs.
2. Click **iContact Configurations** – the plural option with the computer icon.
3. Click the iContact configuration.
4. Copy the data in the Username, API Password, API AppID, Endpoint URL, Account ID, and Client Folder ID fields and paste it into another document like Notepad or Word or Pages. You'll need them again in the next section.
5. Click the **Delete button**.

## Configure the iContact Configuration page and sync the API connection

1. Click the **+ tab** for all tabs.
2. Click **iContact Configuration** – the singular option with our logo.
3. Click the **Edit button**.
4. Using the data you copied, complete the fields in the iContact API Connection section, then click **Save**.
5. In the Salesforce API Connection section, **log in with your Salesforce System Administrator username and password**.

## 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 > Communication Templates (under Administer) > 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](mailto: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 **+ tab** for all tabs.
2. Click **iContact Configuration** – the singular option with our logo.
3. In the Salesforce API Connection section, **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](mailto:salesforce@icontact.com). We're available Monday – Friday, 9 a.m. – 6 p.m. Eastern Time.

# Missing Add To Campaign button

Salesforce does not support the Add To Campaign button on every report. The only reports that support the Add To Campaign button are standard Account And Contact, Opportunities And Roles, Cases And Roles, and Lead reports. Salesforce does not support the Add To Campaign button on reports that include Custom Objects like the iContact Message Statistics or iContact Sent Messages objects, nor does it support the button on reports that contain both Contacts and Leads.



If you run a report that does not support the Add To Campaign button, you can export the report to a .csv and upload it directly to your Campaign.

## Upload Campaign Members from a .csv

1. Confirm that the report contains the **Lead/Contact ID** and **Email fields**. If not, customize the report to include the Lead/Contact ID and Email fields.

**Note:** The Lead ID and Contact ID are referred to as the Salesforce.com ID in the Data Import Wizard in the steps that follow.

2. Click the **Run Report button > Export Details button**.
3. Change the Export File Format to **Comma Delimited .csv**, then click **Export**.
4. Click the **Campaigns tab > Click your Campaign**.
5. Click the **Manage Members button > Add Members - Import File**.
6. Follow the steps listed in the Data Import Wizard. Salesforce will send you an email when the upload is completed.

For more information about using the Data Import Wizard, see Salesforce's [Data Import Series](#) . For more information about importing Campaign Members, see [Importing Campaign Members](#)  in the Salesforce Success Community.



# 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 > Communication Templates (under Administer) > 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 iContact MessageBuilder tab or Help tab is blank

The Salesforce API Connection section is blank

The Send To Campaign Members button isn't working

These three different 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 load the iContact MessageBuilder tab or Help tab, sync the API connection, or send an email, your browser is 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.

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## Set Your Salesforce Credentials

Username

Password

Re-enter Password

Custom Domain

---

## Sync the API connection

1. In Salesforce, click the **+ tab** for all tabs.
2. Click **iContact Configuration** – the singular option with our logo.
3. In the Salesforce API Connection, **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. Click the **iContact MessageBuilder tab** or [log in 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](mailto: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. Click the **iContact MessageBuilder tab** or [log in 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 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 a Null 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 Appld.**
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 **+ tab** for all tabs.
3. Click **iContact Configuration** – the singular option with our logo.
4. Click the **Edit button**.
5. Update the API Password box with your preferred password, then click **Save**.
6. In the Salesforce API Connection section, **log in with your Salesforce System Administrator username and password**.

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

1. Click **Setup > System Overview (under Monitor)**.

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.

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](https://help.salesforce.com) , or by email at [supportresponse@salesforce.com](mailto: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 generated by a mismatch between your bundled iContact account password and your iContact API password or by trying to send an email from a Sandbox.

### 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 Appld.**
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 **+ tab** for all tabs.
3. Click **iContact Configuration** – the singular option with our logo.
4. Click the **Edit button**.
5. Update the API Password box with your preferred password, then click **Save**.
6. In the Salesforce API Connection section, **log in with your Salesforce System Administrator username and password.**

### iContact for Salesforce and Sandbox

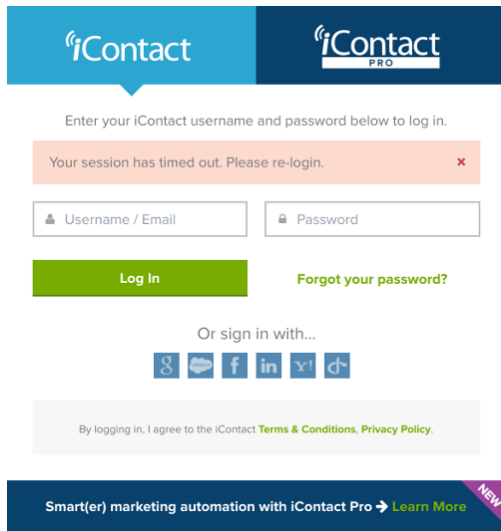
Sending is disabled in Sandbox environments and may result in the “Password is not recognized” error. If you're working in a Sandbox, install iContact for Salesforce in your production environment and try sending again.





# Session has timed out

If you click the iContact MessageBuilder tab and find your session has timed out, follow these steps to easily log in without typing a single keystroke.



The screenshot shows the iContact Pro login interface. At the top, there are two tabs: 'iContact' (highlighted in blue) and 'iContact PRO' (dark blue). Below the tabs, a message states: 'Enter your iContact username and password below to log in.' A red notification bar indicates: 'Your session has timed out. Please re-login.' Below this are two input fields: 'Username / Email' and 'Password'. A green 'Log In' button is present, along with a link for 'Forgot your password?'. Below the input fields, there is a section for social login: 'Or sign in with...' followed by icons for Google, Facebook, LinkedIn, and others. At the bottom, a small text line reads: 'By logging in, I agree to the iContact Terms & Conditions, Privacy Policy.' The footer contains the text: 'Smart(er) marketing automation with iContact Pro → Learn More' with a 'NEW' badge.

1. Click the **+** tab for all tabs.
2. Click **iContact Configuration** – the singular option with our logo.
3. Click the **iContact MessageBuilder tab**.

# 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. Click the **iContact MessageBuilder tab** or [log in to iContact directly](#).
2. Click **Email > Pending 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 > Security Controls (under Administer) > 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 **Security Controls (under Administer) > 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 > System Overview (under Monitor)**.

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](https://help.salesforce.com) , or by email at

[supportresponse@salesforce.com](mailto:supportresponse@salesforce.com).

8. Confirm your firewall isn't blocking iContact.
  - a. Click **Setup > Manage Users (under Administer) > 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.

---

## Set Your Salesforce Credentials

Username

Password

Re-enter Password

Custom Domain

---

## Sync the API connection

1. Click the **+** tab for all tabs.
2. Click **iContact Configuration** – the singular option with our logo.
3. In the Salesforce API Connection section, **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 Appld.**
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 **+ tab** for all tabs.
3. Click **iContact Configuration** – the singular option with our logo.
4. Click the **Edit button**.
5. Update the API Password box with your preferred password, then click **Save**.
6. In the Salesforce API Connection section, **log in with your Salesforce System Administrator username and password**.

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

1. Click the **iContact MessageBuilder tab** or **log in 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](mailto:deliverability@icontact.com), or by [chat at iContact.com](#) [↗](#). iContact Deliverability hours are Monday - Friday, 8 a.m. - 8 p.m. Eastern Time.

# E

## Support

Help is never more than a click or call away.

### iContact Help Portal

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 for Salesforce Support for iContact for Salesforce-specific questions. For example, questions about your bundled 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](mailto:salesforce@icontact.com). iContact for Salesforce Support hours are Monday - Friday, 9 a.m. - 6 p.m. Eastern Time.

### iContact Deliverability

Reach out to iContact Deliverability if you have questions about reducing bounces, list cleaning services, or if sending is disabled for your account.

iContact Deliverability can be reached at 1 (888) 538-5590, internationally at +1 (919) 957-6070, by email at [deliverability@icontact.com](mailto:deliverability@icontact.com), or by [chat at 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](mailto:sales@icontact.com). iContact Sales hours are Monday - Friday, 9 a.m. - 6 p.m. Eastern Time.


### iContact Design Services

Reach out to iContact Design Services if you need to make big changes to your 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](mailto: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 [help.salesforce.com](https://help.salesforce.com) , or by email at [supportresponse@salesforce.com](mailto:supportresponse@salesforce.com).