Guide for

Salesforce e-shot™ APP

How to use the integrated e-shot™ features within Salesforce

Version 1

March 2018

Contents

1. Introduction

The integration of Salesforce with e-shot™ offers two main benefits:

- Contacts can be exported from Salesforce into an e-shot™ contact group of your choice
- e-shot™ campaign statistics can be viewed within Salesforce

Leads and Contacts can be pushed from Salesforce into e-shot™ via the Campaigns page in Salesforce to a chosen e-shot™ group. Once imported into e-shot™, the contacts can be used in any campaign.

Salesforce will retrieve campaign performance information from e-shot™, allowing you to view clicks, displays, sends, hard bounces, unsubscribes and interaction details. This information can then be used within the Salesforce Reports section to search and filter contacts as well as providing the criteria to create marketing campaign address books to drive future campaign sends.

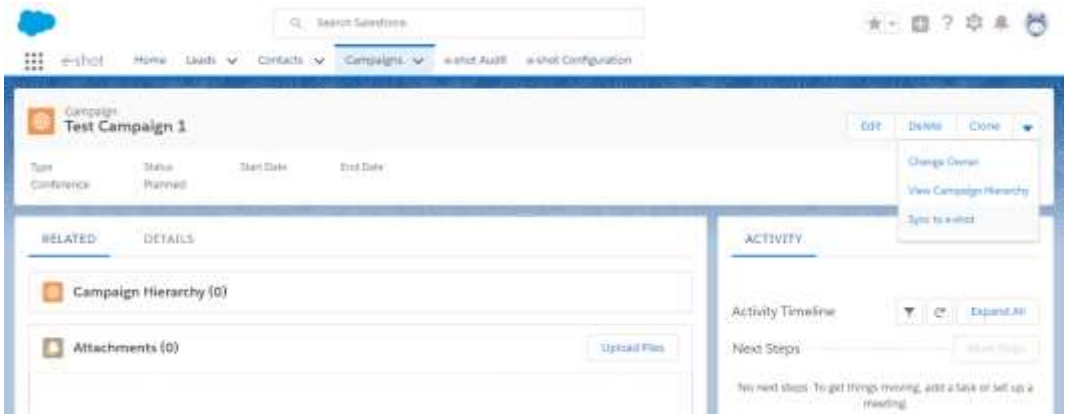
This document will walk you through the synchronisation process and help to illustrate how the two systems interact.

2. Contact Synchronisation

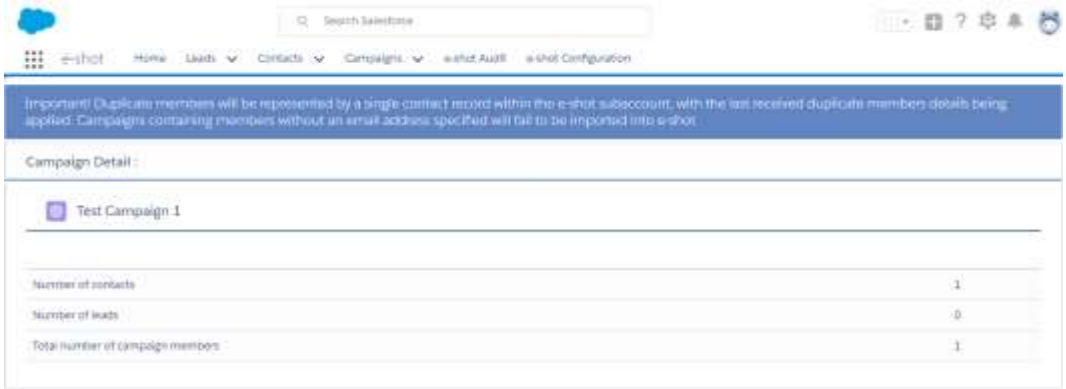
Once the setup has been completed and you are logged into Salesforce as a mapped user, the next step is to navigate to the Campaigns page by clicking on the Campaigns menu item. From the Campaigns list, click on a campaign name to show the campaign details.

The next step is to click on the 'Sync to e-shot' option, which has a button at the top of the Classic view.

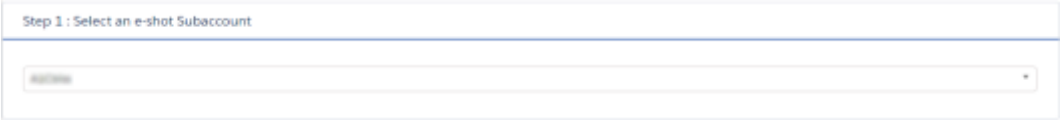
If you prefer to use the Lightning Experience view, then the 'Sync to e-shot' option is located from the menu dropdown, pictured below. It is possible to move the 'Sync to e-shot' option from the dropdown menu to a button of its own, but this has to be done independently and cannot be done as part of the package install.



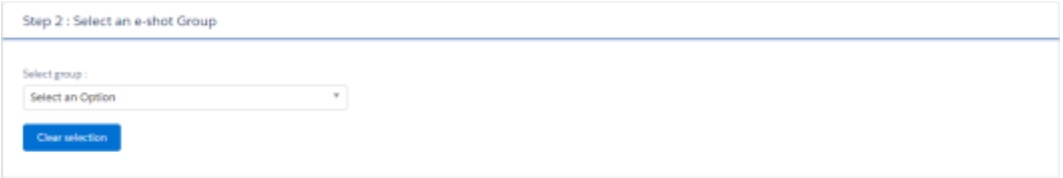
Clicking the 'Sync to e-shot' option will navigate to a new page.



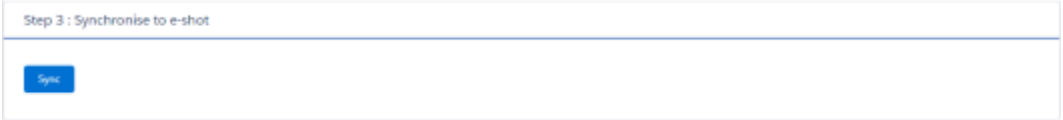
Underneath in step 1, the e-shot™ Subaccount the Salesforce campaign members will be pushed into is displayed.



In step 2 an e-shot™ parent group is selected, either by choosing an existing group from the dropdown option, or by selecting 'Create a new group' and entering a new group name.

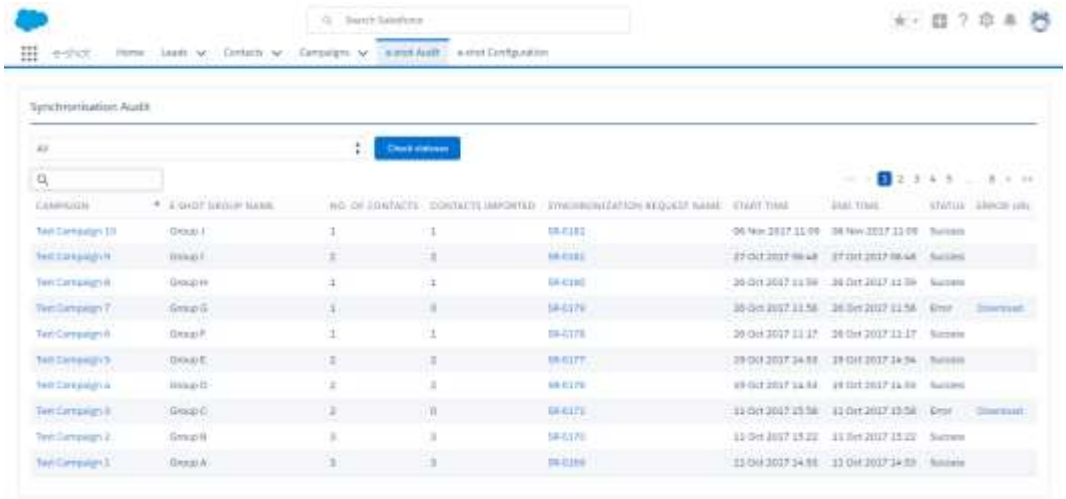


Then click 'Sync' within step 3 to start the synchronisation.



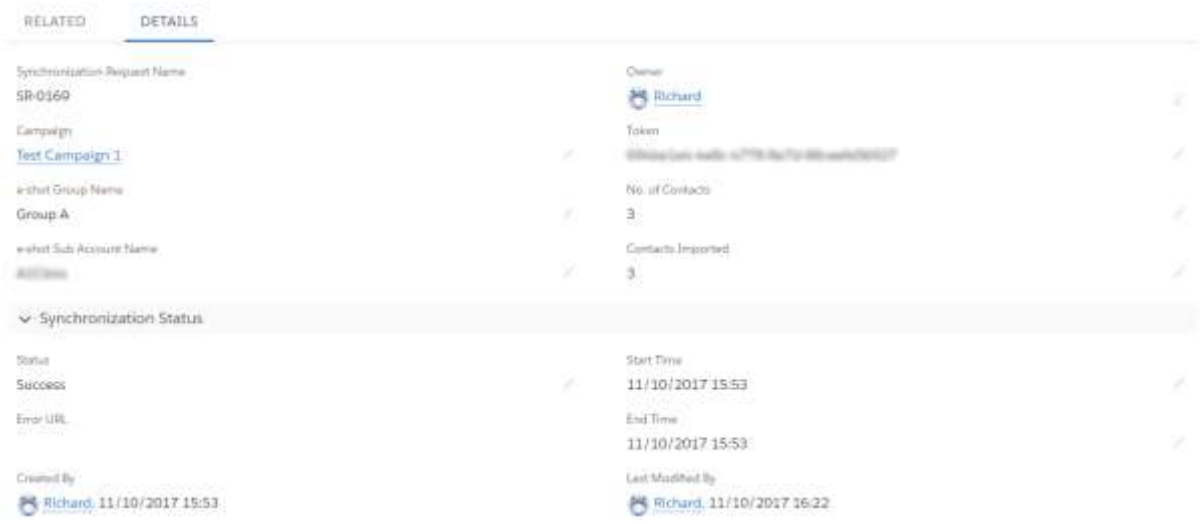
3. Audit Page

Once a synchronisation has been initialised the progress can be monitored on the Audit page, which records all of the synchronisation attempts in chronological order. To navigate to the Audit page click on the 'e-shot Audit' menu item that's present at the top of the page in either the Classic or Lightning Experience view.



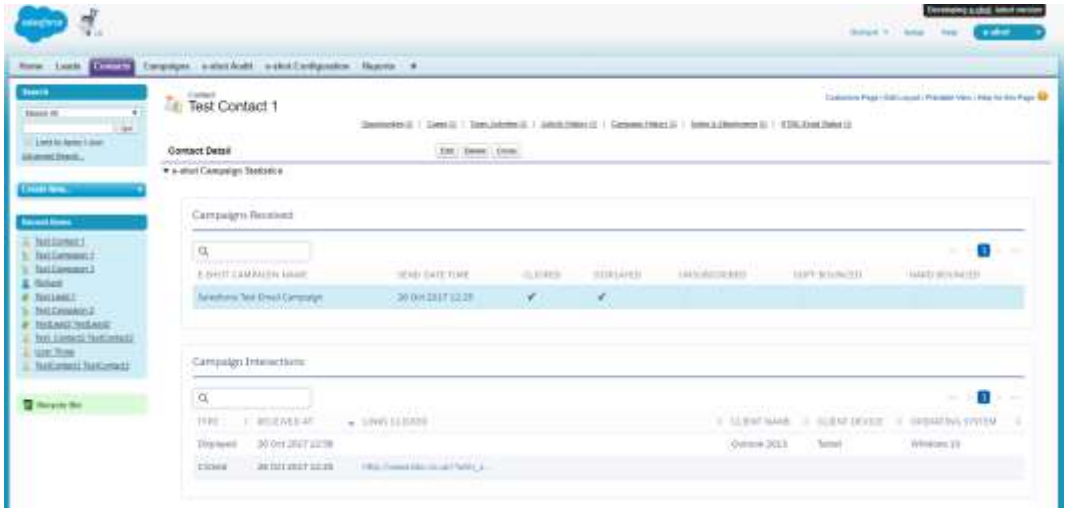
To update the status of any incomplete synchronisations click on the 'Check statuses' button.

If a synchronisation fails then an error report is generated and can be downloaded from the link in the 'ERROR URL' column. The campaign name provides a hyperlink to the respective Salesforce campaign, while the 'SYNCHRONIZATION REQUEST NAME' column link provides a variety of information about the synchronisation request.

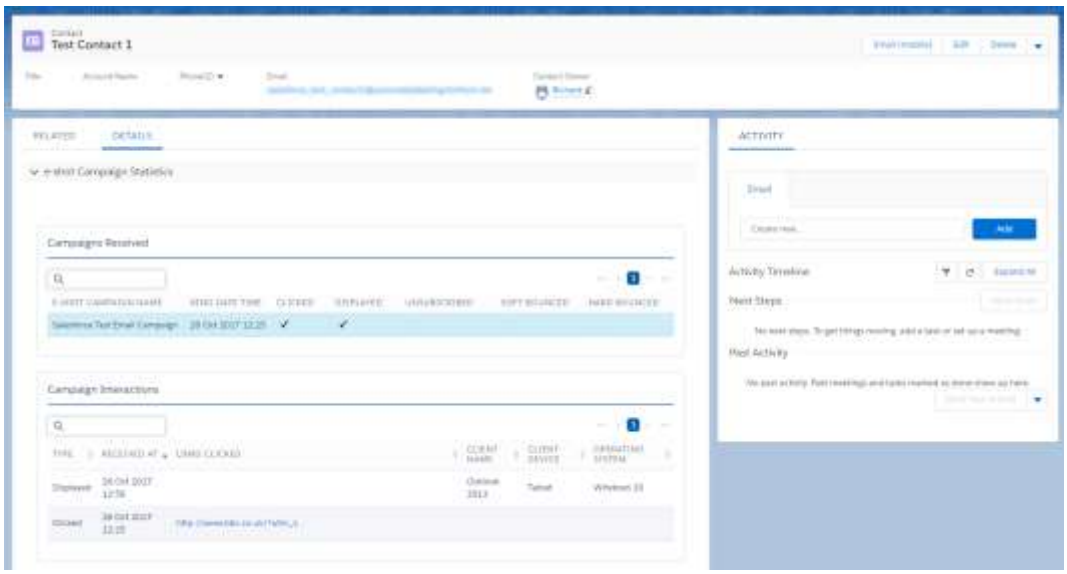


4. Contacts & Leads Information

As part of the scheduled synchronisation process, e-shot™ send information is imported into Salesforce and is displayed for each contact or lead. To locate this information for a contact, click the 'Contacts' option from the main menu, then select a contact to view their information. While using the Classic view, the e-shot™ information will display at the top of the Contact page.



If you're using the Lightning Experience view, then the e-shot™ information is contained within the 'DETAILS' tab.



The details of each campaign are listed in the Campaigns Received table, clicking one of the campaigns to select it will populate the Campaign Interactions table for that record.

The e-shot™ information for a lead is located in a similar location and provides the same details. To locate this information for a lead, click the 'Leads' option from the main menu, then select a lead to view their record. While using the Classic view, the e-shot™ information will display at the top of the Contact and Lead pages, while Lightning Experience users will need to navigate to the 'DETAILS' tab.

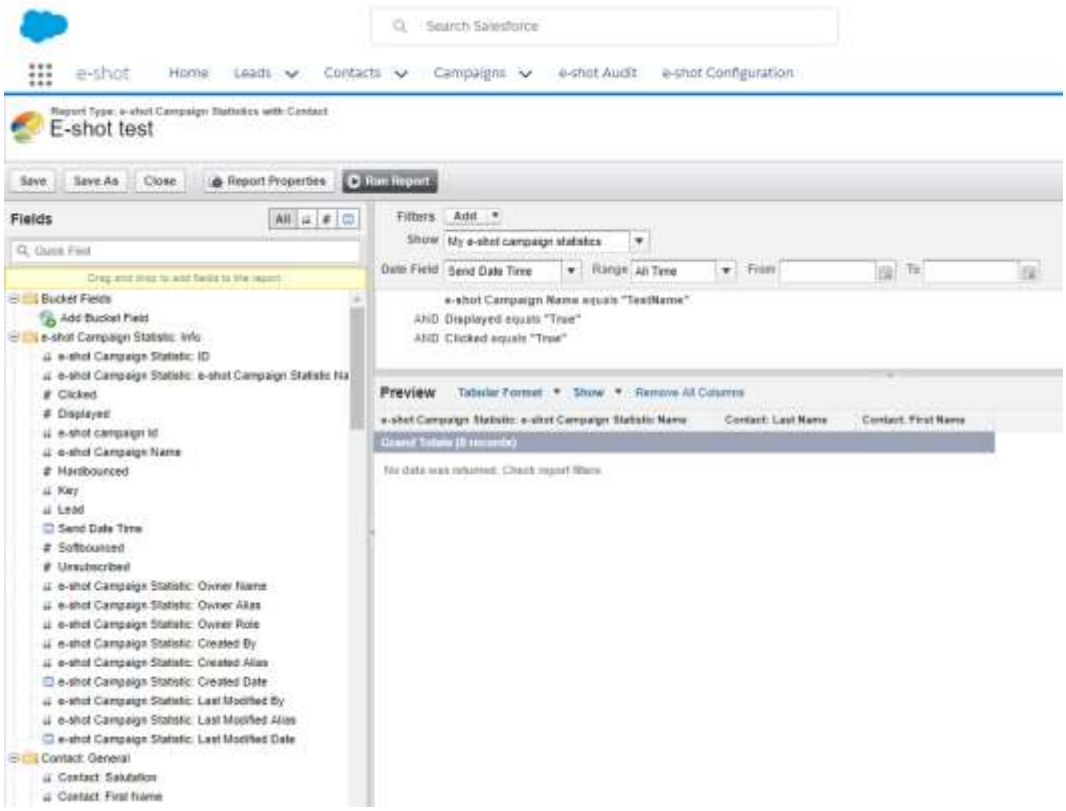
The campaign statistics summary displays all e-shot™ campaigns sent to the contact or lead in question. This information is saved to Salesforce and can be reported on, using the e-shot™ information to filter the query. However, the e-shot™ individual interaction information is only visible within the Contact or Lead pages, it is not saved within Salesforce so cannot be reported on at this time.

Each of the seven campaign columns can be filtered on, as well as 'and', 'or', 'equal' and 'not equal' conditions being supported. The e-shot™ campaign information can be used to break down your contacts into useful groups. For example, once a campaign has been sent the contacts can be easily broken down into who has displayed the campaign, who has clicked a link within the campaign and who has not interacted with the campaign at all.

5. Reporting

While using the Classic view, to navigate to the Reports page click the '+' menu item, then click 'Reports'. If you are using the Lightning Experience view, then click the dots menu item in the top left of the menu, then select 'Reports' to navigate to a list of existing reports.

When creating a new report, you will be able to customise the report as you would like by dragging and dropping filters from the left menu into the Filters section, above the Preview table.



You can create a report with complex rules to return the results you require, then save the report for future use and use the results to populate a campaign.