Salesforce connector: creating a campaign

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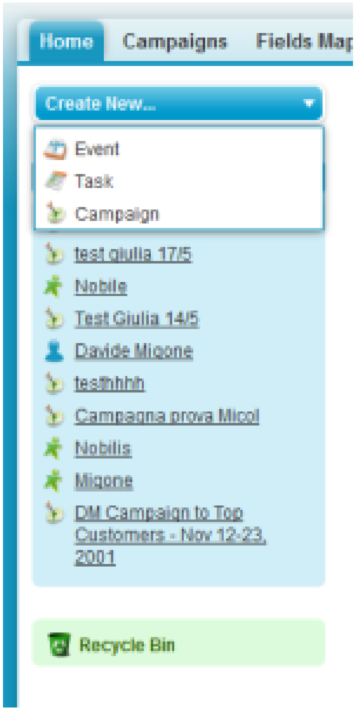
Create a new campaign

Let's start our campaign by creating a new one from the top-left drop-down **Create new:**

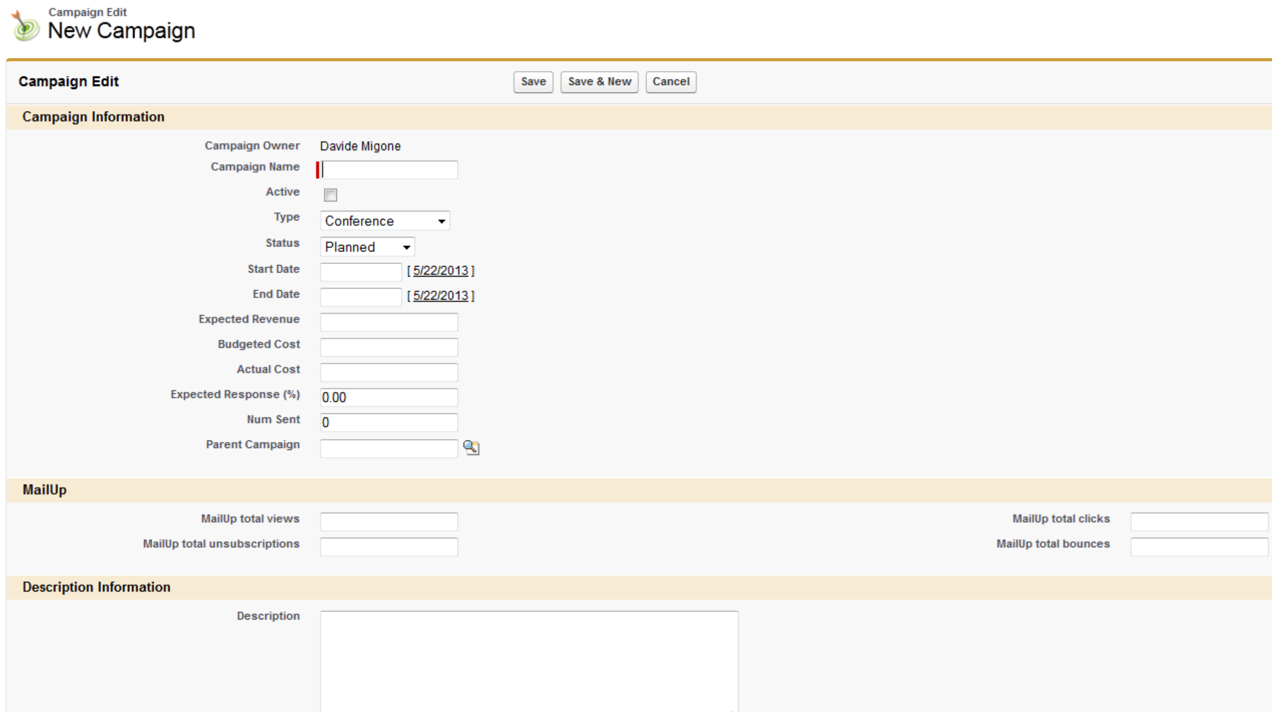


In this page you will be required to insert a few pieces of information:

- Campaign name
- Type: email
- Active: yes
- Status
- Start and end dates

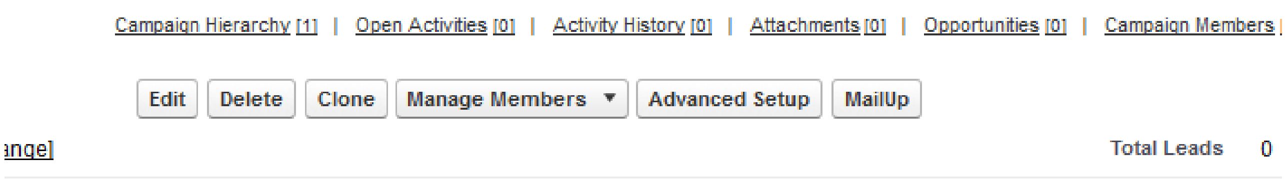
Warning

You should not insert any information in the MailUp section, these will be compiled by the tool itself with the statistics of the sent item.



Add members to your campaign

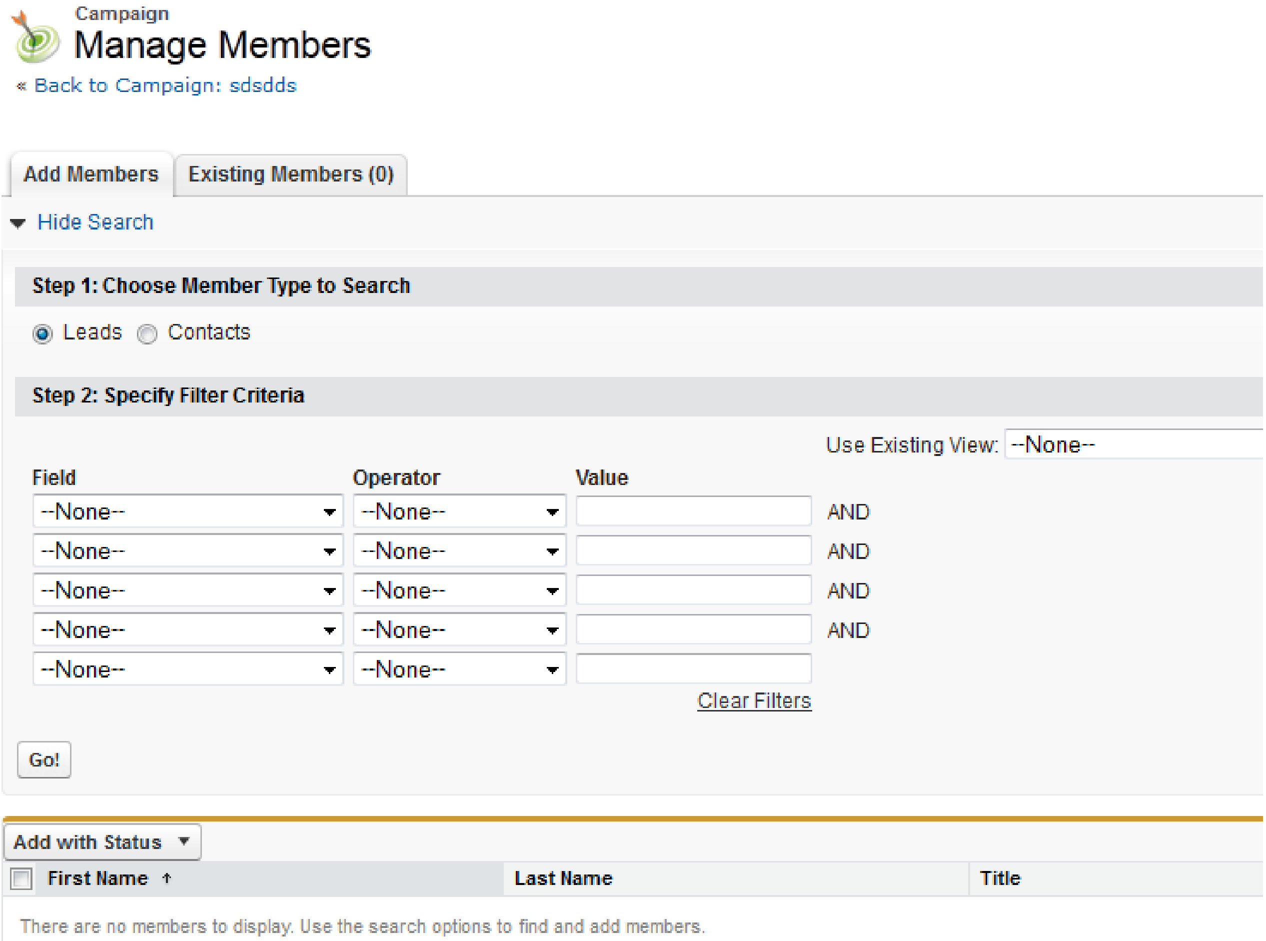
You will then need to add members to your campaign by clicking on the **Manage Members** button.



You will be able to select your campaign members using Salesforce filters.

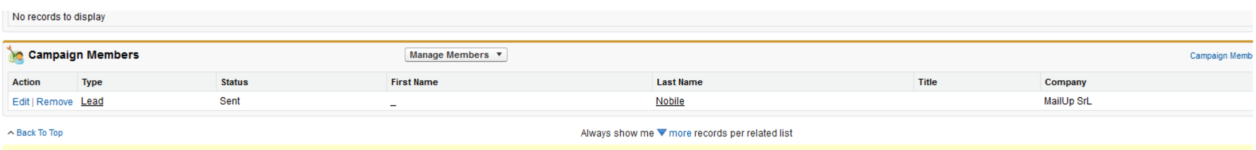
Tip

You can also add campaign members from other reports you might be running in Salesforce, at any time.



After identifying the contacts you want to add to the campaign:

- Click on **Add with status**
- Set it to **Sent**
- You will see these contacts at the bottom of your campaign page in the section **Campaign Members:**



Export campaign members to MailUp

Buttons and actions

You can now export your campaign members to your MailUp account by clicking on the **MailUp** button on the top of your page.

The data will be "pushed" to the List within your MailUp account that you have specified in the Configuration.

Here is a description of the buttons that you will find on this page, and what they do:

Button	Action
Export members to MailUp	Pushes the contacts to MailUp, assigning them to a Group named after the Salesforce campaign The data included in any mapped fields is exported to MailUp. Contacts are pushed in batches of 700 recipients, details are available in *Recipients > Import > Import status*

Import statistics in Salesforce	Imports campaign statistics from MailUp to Salesforce
Create message from template	Creates a new message in MailUp using custom templates created with the WYSIWYG HTML editor. This is needed to associate the message in MailUp with the Campaign in Salesforce. You will edit and send the messages from MailUp so that you can leverage all of its features. A note will automatically be added to the message similar to the following "<MESSAGE ID> - Message generated from Salesforce campaign <CAMPAIGN ID> <DATE DD/MM/YYYY TIME>"
Create empty message	Creates a new, empty message in MailUp (i.e. a message not generated from a template). This is needed to associate the ID of the message in MailUp with the Campaign in Salesforce. You will edit and send the messages from MailUp so that you can leverage all of its features. Choose this option if you want to create the message from scratch using the WYSIWYG HTML editor in MailUp, or if you want to copy and paste your own HTML. A note will automatically be added to the message similar to the following "<MESSAGE ID> - Message generated from Salesforce campaign <CAMPAIGN ID> <DATE DD/MM/YYYY TIME>"
Refresh message preview	Allows you to see the latest version of the message, retrieved from MailUp, without having to log into your MailUp account. This is useful if - down the road - you want to see what email message was associated with this Campaign.
View report	Allows you to view campaign statistics directly in Salesforce, without having to log into your MailUp account. (These statistics are not the same as the statistics that get imported into Salesforce. These are higher level statistics and are static.) For even more high-level campaign statistics, log into your MailUp account and visit the *Statistics* section in the navigation.

What happens after exporting to MailUp

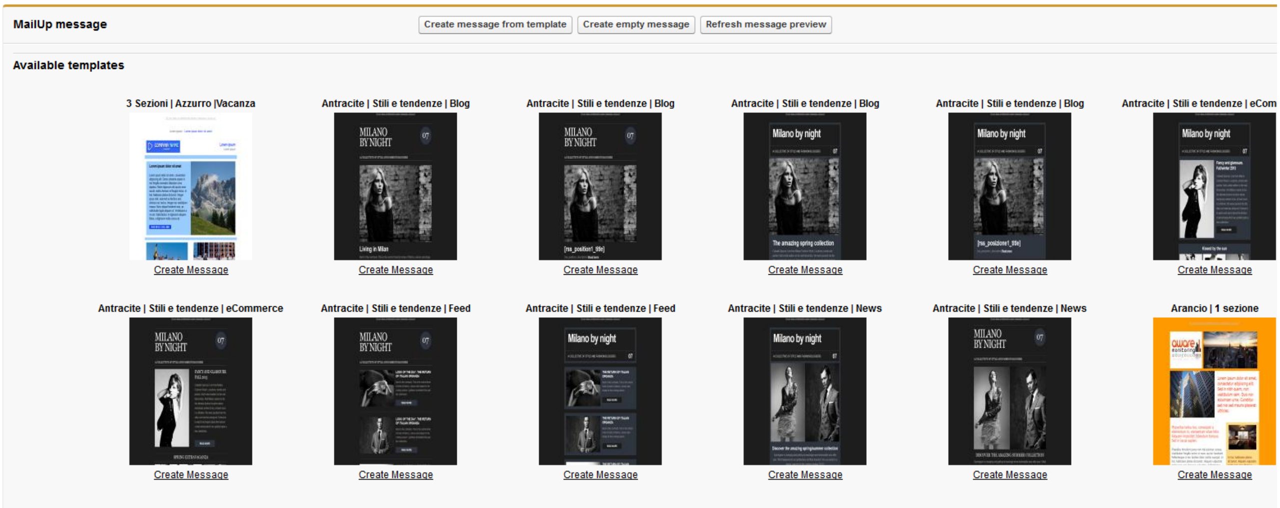
Now log into your MailUp account.

- Under *Recipients* > *Groups* you will find a new Group of recipients with the name of the campaign. Note: if a recipient already existed in MailUp prior to this campaign:
    - The recipient will be assigned to this new Group. The recipient remains assigned to any other group it had already been assigned to
    - The recipient's profile will be updated with the latest information coming from Salesforce. This applies to the data contained in the fields that have been mapped between Salesforce and MailUp in the configuration.
- Under *Messages* > *Email* > *Saved* you will find the message that you have associated with this Campaign after creating the empty message from Salesforce (see *Create empty message* or *Create message from template* in the table above)

Create a new message

Ready to create a new message? First, you must create a message in Salesforce which links to MailUp: in Salesforce on your campaign page, choose if you want to use a MailUp design (Create message from Template) or prefer an empty message (Create Empty message.)

As mentioned above, this step is needed to associate the message that will be sent from MailUp with the Campaign that has been created in Salesforce.



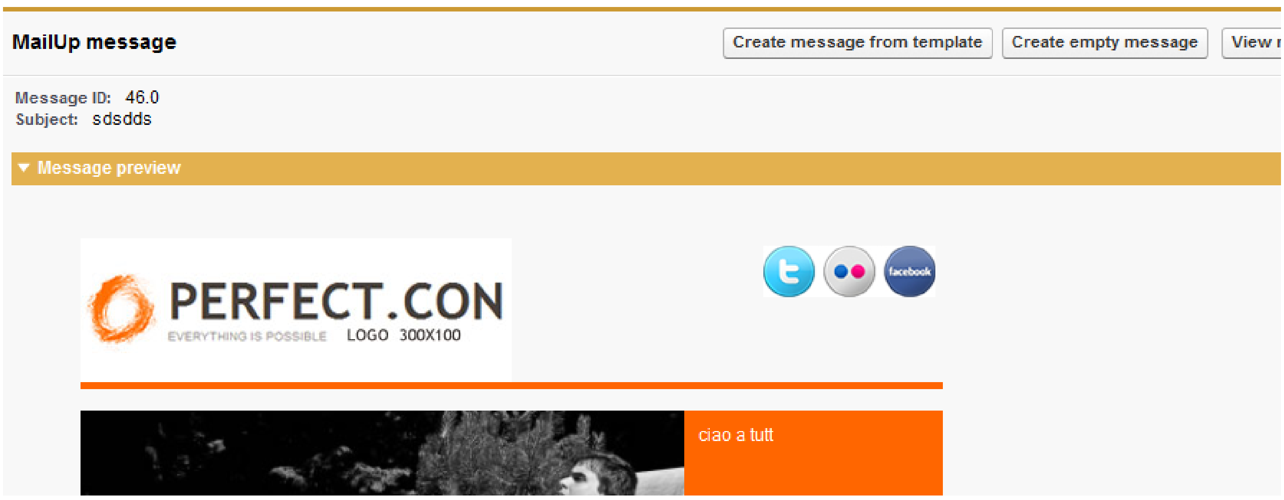
Now, to find the message in MailUp, log into your MailUp account and go to your saved emails:

- The message is named after the Salesforce Campaign
- Campaign details are saved to the message Notes.
- The message is not edited and/or sent from Salesforce, but rather must be sent directly from MailUp. This is because MailUp contains all the advanced features that you need to create, test, and execute a professional email marketing campaign.

Modify your message and see the changes in Salesforce

Whenever you change the message in your MailUp console you will be able to see it in Salesforce by clicking **Refresh message preview**, or simply by refreshing your browser.

This ensures that you are always one click away from seeing exactly the content that has been sent (or will be sent) to your campaign members.



Send your message from MailUp

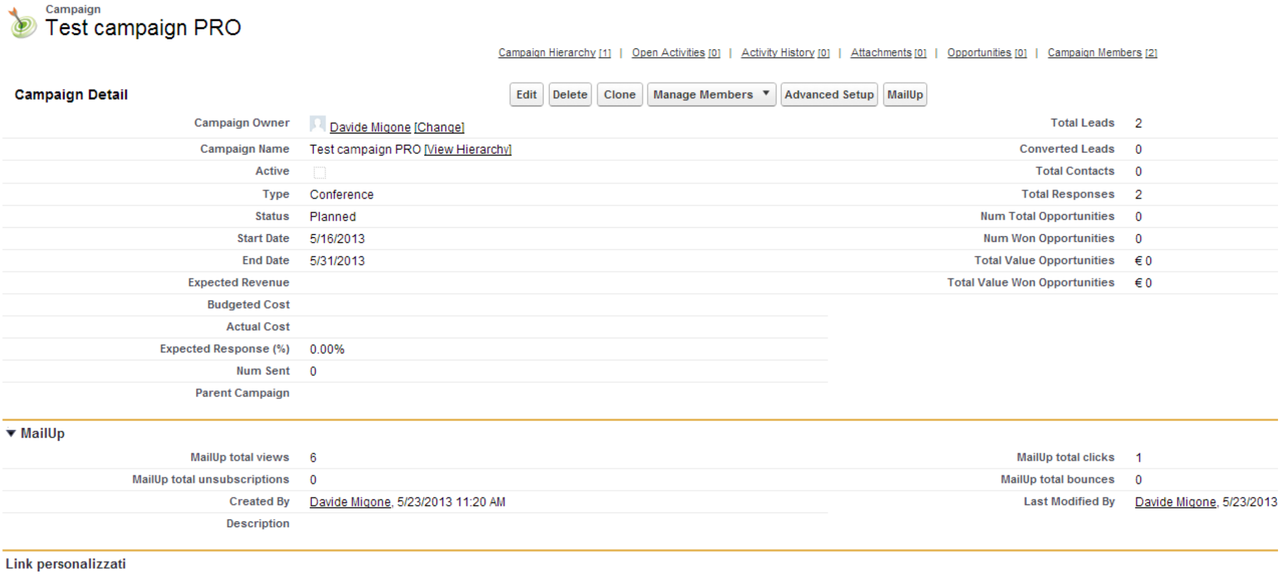
If you are ready to go, send the message from MailUp and select your previously created Group in the Select recipients page.

Warning

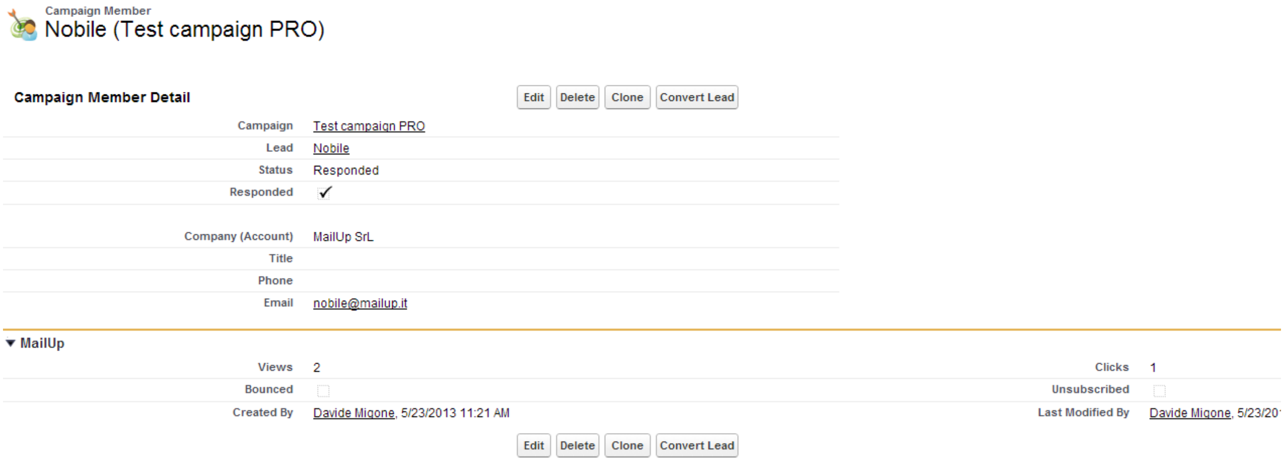
Remember to always change your message's subject. Keep your notes as they are and you will be able to always reference your message back to your Salesforce campaign.

Sync your statistics

After sending the message, you should easily import your statistics in Salesforce with the button **Import statistics in Salesforce** and you will be able to see the data in the campaign page in the MailUp section:



And in the campaign members details page:



If a user unsubscribes in MailUp, the Email Opt-out field in your contact or lead page will be automatically checked.

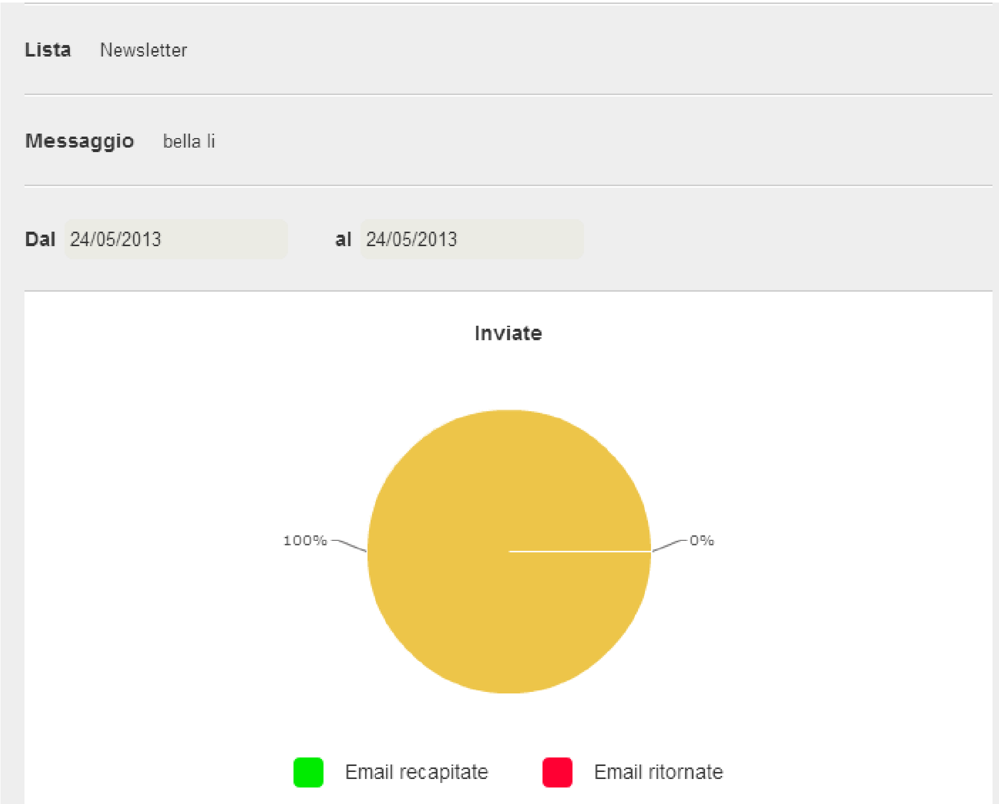
Statistics can be updated on demand with the **Import Statistics** function or by scheduling the statistic synchronization (See Schedule Task).

Please note that the scheduled synchronization will only update statistics for active campaigns with Start Date within the number of days set in MailUp Configuration. If you want to update stats for an older campaign, you need to update them on demand with the **Import Statistics** feature.

Check your results

After sending your email, you will notice a new button **View report** in the MailUp section of your campaign

The pop-up may be empty because your browser is preventing a script from running. Just authorize the script to see the statistics.



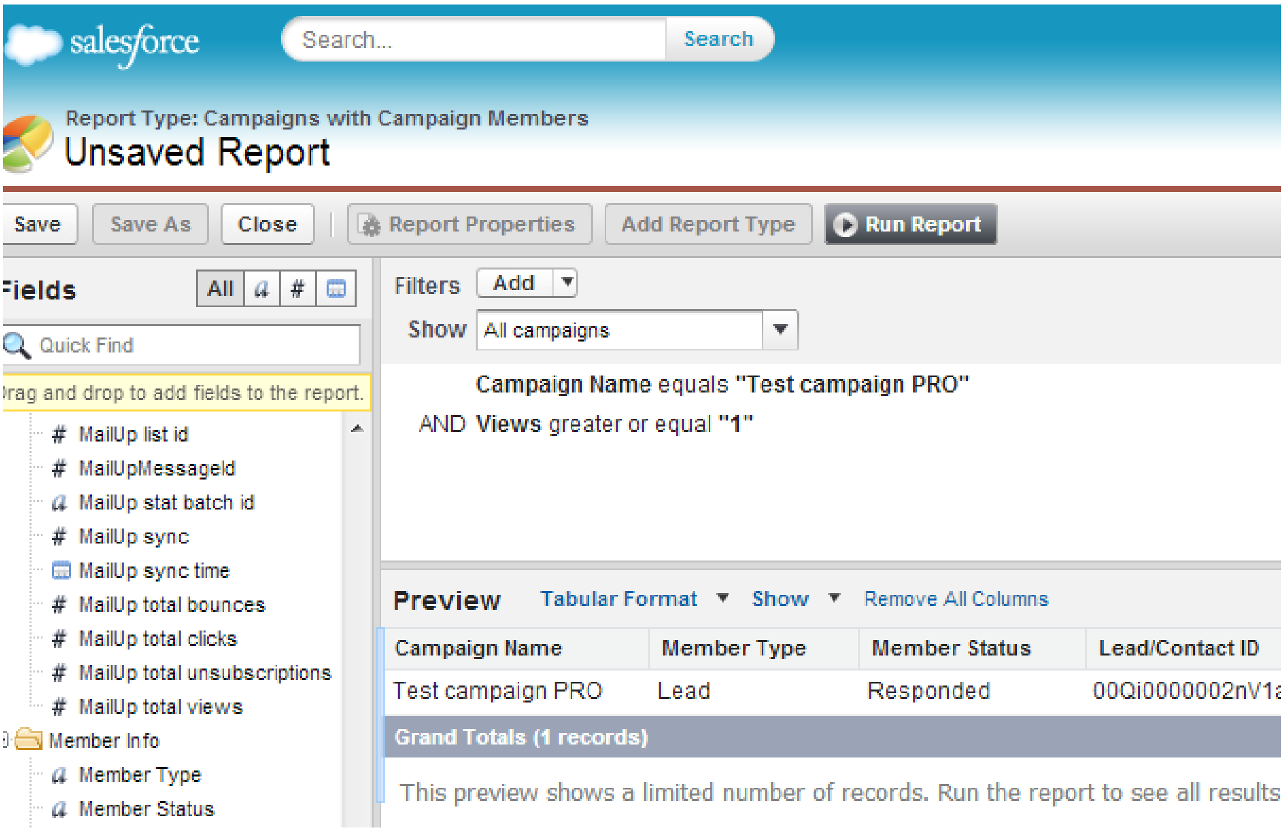
Leverage your data

The data that you imported are visible in each campaign member field and can be used to run a report in Salesforce and to create further campaigns.

Tip

Some example of campaigns:

- Re-engage your user by running a report on those campaign members that did not open a specific message and try to engage them with different content.
- Send specific offers to those members that opened a previous campaign related to a product or service


salesforce
Search...
Search
Report Type: Campaigns with Campaign Members
Unsaved Report
Save
Save As
Close
Report Properties
Add Report Type
Run Report
Fields
All
Quick Find
Drag and drop to add fields to the report.
MailUp list id
MailUpMessageId
MailUp stat batch id
MailUp sync
MailUp sync time
MailUp total bounces
MailUp total clicks
MailUp total unsubscriptions
MailUp total views
Member Info
Member Type
Member Status
Filters
Add
Show
All campaigns
Campaign Name equals "Test campaign PRO"
AND Views greater or equal "1"
Preview
Tabular Format
Show
Remove All Columns
Campaign Name
Member Type
Member Status
Lead/Contact ID
Test campaign PRO
Lead
Responded
Grand Totals (1 records)
This preview shows a limited number of records. Run the report to see all results