'07 User Guide

VerticalResponse for AppExchange

VerticalResponse for AppExchange provides self-service email & direct mail solutions to all salesforce.com users. Create custom mailing lists of any size, design professional sales & marketing campaigns, track post-launch statistics – all from within your salesforce.com account.

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Introduction

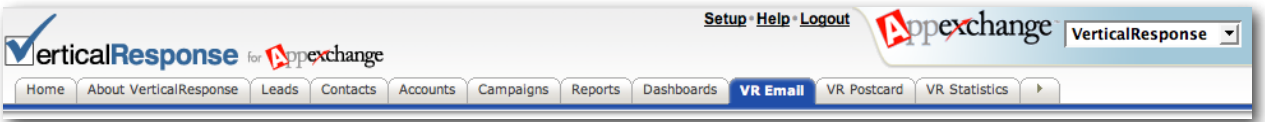
Installation:

To set-up VerticalResponse for AppExchange in your salesforce.com account simply visit the AppExchange:

http://www.salesforce.com/appexchange/detail_overview.jsp?id=a0330000000GI9FAAW

By clicking on the Get It Now > button you’ll be able to add this custom application into your salesforce.com org. Then you can access the VerticalResponse application via the AppExchange pull-down menu at the top right area of your salesforce.com account.

VerticalResponse for AppExchange contains:



3 Custom Tabs

VR Email
Create & send email campaigns and build mailing lists of any size

VR Postcard
Create & send postcard campaigns and build mailing lists of any size

VR Statistics
View post-launch reporting and update Leads and Contacts

2 Custom Objects

VR Email History Lead
View email campaign content and response statuses on the Lead Page Layout

VR Email History Contact
View email campaign content and response statuses on the Contact Page Layout

12 Custom Reports

Leads: Bounced
Leads that have bounced

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Leads that have opened the email

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Leads that have unsubscribed

Leads: Non-Responders
Leads that have taken no action

Leads: Full VR Email History
Detailed summary of all sent VR email campaigns sent to Leads

Contacts: Bounced
Contacts that have bounced

Contacts: Opened
Contacts that have opened the email

Contacts: Clicked
Contacts that have clicked a link

Contacts: Unsubscribed
Contacts that have unsubscribed

Contacts: Non-Responders
Contacts that have taken no action

Contacts: Full VR Email History
Detailed summary of all sent VR email campaigns sent to Contacts

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Totals by VR Email

Leads: Opened
Totals by VR Email

Leads: Clicked
Totals by VR Email

Leads: Unsubscribed
Totals by VR Email

Contacts: Bounced
Totals by VR Email

Contacts: Opened
Totals by VR Email

Contacts: Clicked
Totals by VR Email

Contacts: Unsubscribed
Totals by VR Email

Compatibility

VerticalResponse for AppExchange is compatible with Professional, Enterprise and Unlimited editions of salesforce.com. However, certain list building functionality is only available to users with the "Campaigns" tab enabled. We encourage you to contact your salesforce.com sales representative if you are interested in upgrade options.

Account Creation/Linking

After you've installed VerticalResponse for AppExchange you can click on any of the three VerticalResponse custom tabs to get started. If you already have an existing VerticalResponse account, you will be prompted to enter your password to link it to your salesforce.com account. You'll only need to do this once and all future logins will be authenticated automatically.

If you do not yet have a VerticalResponse account, as soon as you click on any of the three custom tabs one will be created for you immediately and it will be based on the email address listed in the "Email" field of your salesforce.com profile. To locate or change your current "Email", simply follow these instructions:

Setup > Personal Setup > My Personal Information > Personal Information > Email

Overview of 3 VerticalResponse Tabs & Global Navigation

VR Email: Create & Send Email Campaigns

The VR Email tab houses all active, but unsent email campaigns. You will have 4 options for email creation:

1. VerticalResponse’s wizard-based templates
2. Upload your own HTML content (i.e. Freeform)
3. Upload your own Text-Only content

NEW 4. Access a saved salesforce.com email template

You can create as many email campaigns as you like and once they are launched they will move to the VR Statistics tab. For a more detailed overview of email campaign creation, go to “VR Email”

Within the VR Email tab you can build and view mailing lists from your salesforce.com Leads & Contacts. Please see “List Building” for more information on VerticalResponse for AppExchange’s powerful query tool.

VR Postcard: Create & Send Postcard Campaigns

The VR Postcard tab houses all active, but unsent postcard campaigns. Postcard campaigns are created using a simple, wizard-based tool that enables anyone to create professional, high-quality postcards in just minutes. You can upload your own high-resolution graphic or choose from our image gallery with over 800,000 available options.

Once you create and launch the postcard campaign, VerticalResponse for AppExchange takes care of the rest, which includes: 4 color printing, UV gloss coating on both sides, First Class postage and inserting into USPS mail. Please note VerticalResponse for AppExchange can only send to valid US postal addresses at this time. For a more detailed overview of postcard campaign creation, go to “VR Postcard”

VR Statistics: View Post-Launch Reporting and Update Leads & Contacts

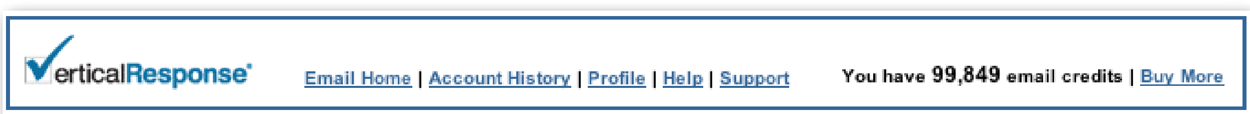
From the VR Statistics tab you can analyze the performance of your sent campaigns. VerticalResponse provides a wide array of viewable and downloadable reports based on the actions of your recipients.

Data for the email addresses that “opened”, “clicked”, “bounced” and “unsubscribed” is readily available as well as the ability to compare multiple campaigns and analyze domain-specific reports. This information can be updated into salesforce.com on the Lead, Contact and Reports level.

NEW: Update and view email campaign statistics on the Lead/Contact Page Layout with our new custom objects: “VR Email History.” Simply add these objects into the Related Lists section and you’ll be able to track multiple campaign responses (i.e. Sent, Bounced, Opened, Clicked, Unsubscribed) on the individual record level.

Global Navigation Buttons

At the top of each of the three VerticalResponse for AppExchange tabs are navigational links and we’ll explain each one below:



Email/Postcard/Stats Home

These links will take you back to the start page for their respective tab and mimic the same behavior of simply clicking on the main Tab.

Account History

Purchases:	Lists all email and postcard purchases
Campaigns:	List all sent email and postcard campaigns, date sent and number of credit used
Email Credits:	A running balance of remaining email credits
Invoices:	Lists invoice history (if applicable)

Profile

This is an important area of your VerticalResponse account and is not related to your salesforce.com profile. Within this area you can contact information, time zones, or upload a logo for your email campaigns.

> *NOTE: The VerticalResponse/salesforce.com account linkage is based on the email address in the Log In area so it's very important not to edit this information.*

Some key areas of the Profile are:

Time zone:	Determines the date/time for campaign launches
Support Email:	Replies to your sent campaigns will be routed here (can be changed on a per campaign basis)
Logo:	The default logo for VR Template email campaigns. This can also be changed on a per campaign basis.

Help

An extensive FAQ area for both the email and postcard products.

Support

VerticalResponse provides top-notch service and support to all salesforce.com users, at no charge. Our expert staff can be reached via phone, email, or live chat and will gladly assist in a timely and professional manner.

Email:	vip@verticalresponse.com
Live Chat:	Located at the bottom of each VR tab
Telephone:	1-866-683-7842 ext. 1 (toll free)

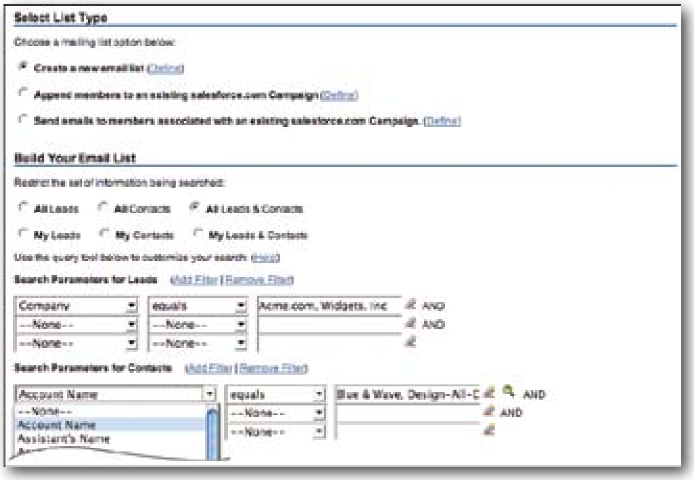
List Building

Using VerticalResponse for AppExchange's powerful query tool users can build mailing lists of any size, at any time. VerticalResponse does not have list size limits, so unlike salesforce.com's Campaign Member Import and Mass Email tools, you can create lists on-the-fly without restrictions.

In addition, VerticalResponse for AppExchange allows you to create combination lists (containing both Leads and Contacts), which is not an option within salesforce.com.

List Type and Query Tools

To build a new email list click on the New Email List button at the top of the VR Email tab. At the top of the page, under "Select List Type", you will see your list type options. Following the list type section is the "Build Your Email List" section. The actions required for this section will be dependent upon which list type option you choose.



The following describes each option and its corresponding "Build Your Email List" section:

1) Create a new email list

A "Mass Email" list is comprised of Leads and Contacts taken from your salesforce.com account. The Mass Email list can also be used for postcard marketing campaigns, assuming full U.S. postal addresses are present. Mass Email lists are not associated with salesforce.com "Campaigns".

<u>Data Set Selection</u>

All Leads	All Contacts	All Leads & Contacts
My Leads	My Contacts	My Leads & Contacts

<u>Search Parameters</u>

This query tool allows you to add up to 8 custom search filters to shape your list. If you've chosen to search for both Leads and Contacts above there will be a set of filters for both Leads and Contacts.

2) Append members to an existing salesforce.com Campaign

A "Campaigns" list is comprised of Leads and Contacts that have been assigned to a specific salesforce.com Campaign. Using the VR query tool, you can create a new list of Leads and Contacts that will automatically be added/ appended to the selected salesforce.com Campaign. Once created, this list can be used to send email and postcard marketing campaigns using VerticalResponse.

Data Set Selection

All Leads	All Contacts	All Leads & Contacts
My Leads	My Contacts	My Leads & Contacts

Campaign Selection

A pull-down menu will display all "Active" salesforce.com campaigns. There is an option to the right of the pull-down menu to toggle between displaying "All" or "My" campaigns.

Search Parameters

This query tool allows you to add up to 8 custom search filters to shape your list. If you've chosen to search for both Leads and Contacts above there will be a set of filters for both Leads and Contacts.

3) Send emails to members associated with an existing salesforce.com Campaign

This option allows you to send email and postcard campaigns to Leads & Contacts already assigned to a salesforce.com Campaign. In this case, you are not querying to build a new list or append records, you're simply mailing to the existing Campaign members.

Campaign Selection

A pull-down menu will display all "Active" salesforce.com campaigns. There is an option to the right of the pull-down menu to toggle between displaying "All" or "My" campaigns.

Data Mapping

The Data Mapping page is where you decide what fields you would like included in your mailing list. Since both Leads and Contacts can be compiled into one mailing list this page has a separate column for each.

Use combinations of the pull-down menus and checkboxes to the right to customize your list. If custom fields are included they should be given an informative name for future reference.

> *NOTE: To personalize your outgoing email campaign you will need to use the VerticalResponse-specific merge field syntax. For example, to personalize by "First Name" you would need to add {FIRST_NAME} into your email content. The same is true for custom fields such as "Product Type" where the merge field would be {PRODUCT_TYPE}.*

Preview, Name and Compile List

On the Preview List Data page you are shown a sample of the query results. You can then decide to go back and revise your query, change your data mapping options, or proceed to compile your list.

The last step is to give your mailing list a name so you can identify it on the "View Active Lists" page. Once the list is loaded you'll receive a summary report that will tell you which records were loaded and which were not, with the associated reasons for failure.

View Active Lists

This area contains all active mailing lists that can be used for email and/or postcard campaigns. You can also access your active lists using the **View Active Lists** button found within the VR Email and VR Postcard tabs.

The following are the possible values for the list "Type" column on the View Lists page:

Salesforce Mass Email	>	Compiled using option 1 above (PE, EE & UE editions)
Salesforce Campaign	>	Compiled using option 2 or 3 above (PE w/ Campaigns, EE & UE editions)

VR Email

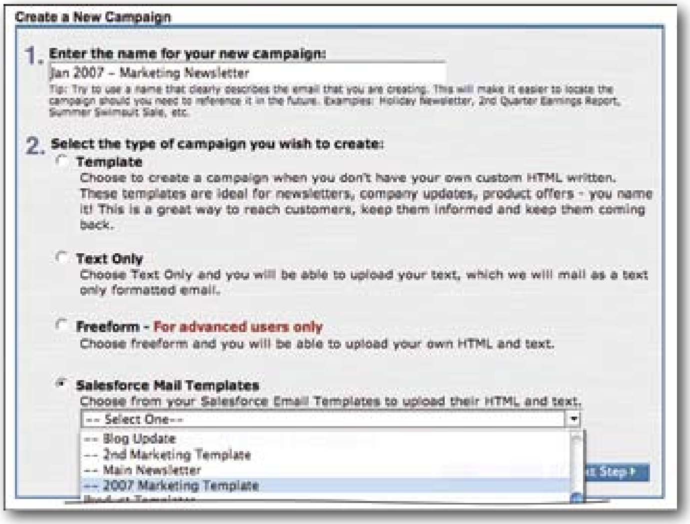
Email campaigns can be created in just minutes. They are saved in your account indefinitely for further editing or to use as a reference tool. VerticalResponse offers 4 types of email campaigns: VR Templates, Freeform (upload custom HTML), Text-Only (upload custom Text) and Salesforce Mail Templates.

Email Campaign Creation

To start a new email campaign click on the New Email Campaign button on the VR Email tab, then give the new campaign a name. Below we have provided information outlining the creation process for each type of email campaign:

VR Templates

Our wizard based Template creation tools enable you to create professional looking HTML emails in just minutes, with no technical experience. It's as easy as selecting your background border style, uploading your images, and pasting in text content.



Freeform

For advanced users who prefer your own branded look and feel we have provided the capability to create Freeform HTML email campaigns. Just paste in your own HTML source code, and back up text version, into the two large input sections. Recipients who cannot handle HTML emails will only receive the text-only version.

Text-Only

For users who prefer to send plain text emails we offer a Text-only email campaign type. Similar to the Freeform version, editing the Text-only type of campaign involves pasting plain text into a large text input section.

NEW: Salesforce Mail Templates

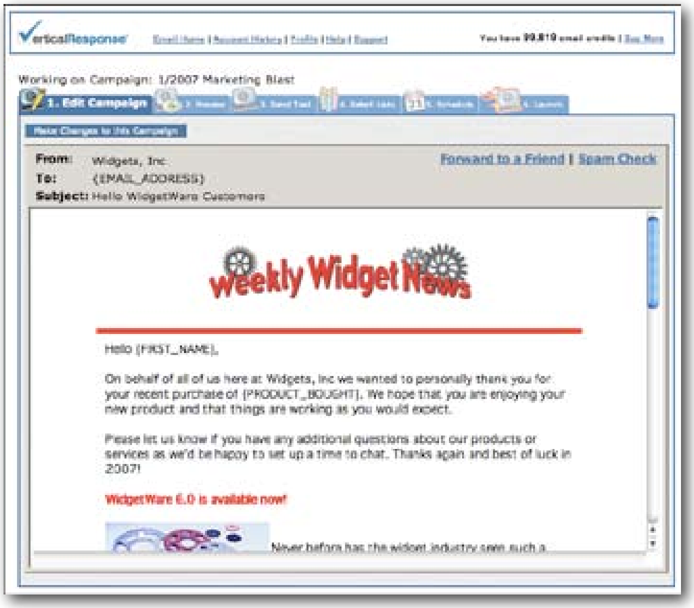
Access saved mail templates that exist within your salesforce.com account. Simply select the template name and the content will be automatically loaded into your VerticalResponse account for mailing purposes. Using the Merge Field Editor, you can easily map your salesforce.com merge fields to standard or custom fields in VerticalResponse. This ensures proper syntax for personalization in your outgoing mass email.

Remaining Pre-Launch Steps

Once you've completed the initial creation process there are a few remaining steps to complete before launching.

Preview

A snapshot of your final campaign, without any of the edit functions displayed.



Send Test

Send a copy of your email campaign to yourself or to a seed list of up to 10 people. This is a great way to obtain approval from different departments/co-workers and allows you to see the message in its intended fashion.

Two emails are sent for each test email submission: a graphical (HTML) version and a text-only version. The only exception would for Text-Only emails as only one version is mailed.

NOTE: The recipients on your mailing lists will only receive one copy of your live campaign when it's launched and this will be dependent upon the settings of their email program.

Select Lists

You can attach as many lists as you like to your outgoing campaign. Our system will automatically de-dupe the selected audience to ensure that if an email address appears on multiple lists, the recipient receives only one copy of your message.

For more information about building email lists please see the "List Building" section above.

Schedule

You can schedule your campaigns to be sent at any time of the day and up to 4 months in the future. In order to ensure all email campaigns are CAN-SPAM Compliant, each email campaign must pass through an approval process after it has been launched.

Approval periods take place every 2 hours, between 7:00am and 7:00pm PT, daily. If your email campaign is "declined" for any reason, you will receive an email highlighting the issue and what needs to be fixed in order for approval.

Launch

This is the final step that needs to be completed in order for your campaign to be mailed. Our system will check to make sure you've completed all of the other pre-launch steps and will indicate steps that still require action.

The total campaign size will referenced against the amount of "Email Credits" currently available within your account. If the credit balance will cover the campaign size, the credits will simply be deducted and your campaign will be launched. If you do not have enough credits at the time of launch you'll be prompted to purchase more before the campaign can be sent.

Clicking the "Launch" button sends your campaign into the Approval Queue and moves the message from the VR Email tab into the VR Statistics tab.

Purchasing Email Credits

The fees associated with VR email campaigns are tied solely to the number of emails that you are sending at any given time. There are no setup or support costs, and no minimums to buy or license fees. Email credits can be purchased at any time via the "Buy More" links at the top right of each VR tab. Postcard purchases are handled differently and are explained in the VR Postcard section below.

There are various pricing tiers depending on your overall list size. However, if you plan on mailing weekly or monthly email campaigns, buying the email credits in bulk will save you money as the cost per email decreases at higher quantities. Unused email credits never expire and can be used at any time in the future.

For more information on email credit pricing and instant quotes please visit:
http://www.verticalresponse.com/pricing/

For larger purchases and quotes please email from more information:
vip@verticalresponse.com

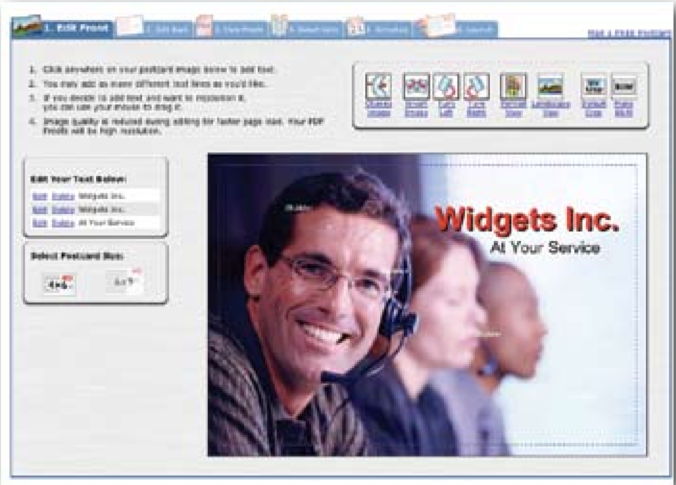
VR Postcard

Postcard Campaign Creation

VR Postcard is a wizard-based tool that enables anyone to create professional, high-quality postcards in minutes. Postcards will be printed on high quality, 12 point card stock, UV coated on both sides and sent First Class. We currently offer two different size options: 4 x 6 (finished size 3.75" x 5.5") or 6 x 9 (finished size 5.5" x 8.5"). You can even send yourself one free postcard to try out the creation process and see the quality. Just walk through the following steps and let VR take care of the rest:

Design the Postcard "Front"

Simply select a picture from our image library of over 800,000 high-quality images or upload one of your own. Move your cursor to any section of the image to add text, you can do this as many times as you'd like. Your copy will appear directly on top of your image and you can even move it around for precise placement.



Add Text to the Postcard "Back"

Type your message on the back of the card and use the custom controls to adjust your font type and size. Make sure to edit the Return Address to ensure it is valid and accurate.

View Proofs

We require all users to view PDF Proofs of both sides of the postcard campaign. By clicking on the "View Proof" buttons, a PDF document will be generated for you to review and print out. A unique Proof Code will be placed near the top of each PDF Proof (Front and Back) and you will need to type in these codes on the final step of the launch process.

Select Lists

You can include one, or many, mailings lists for your outgoing postcard campaign – as long as they contain valid postal addresses. If you happen to have postal address overlap across multiple lists our built-in de-duping feature will ensure each recipient will receive only one postcard. Keep in mind that 2 addresses would not be duplicates as long as one of the following fields is different: First Name, Last Name, Address 1, Address 2, City, State, Zip.

NOTE: If you are sending your one free test campaign you would choose the “1 FREE 4x6 POSTCARD” list. You will then be prompted to enter the “To Address” on the final launch page.

For more information about building postcard lists please see the “List Building” section above.

Schedule

Postcard campaigns are scheduled by date of “launch”. This will be the date VerticalResponse for AppExchange begins processing the postcard, staging the printing and eventually inserting it into the USPS postal system. Because of these multiple steps, your postcard campaign will be mailed approximately 5 business days after your launch date has arrived. Similar to the email campaigns, postcards can easily be un-launched, revised and re-launched.

Launch

This is the final step that needs to be completed in order to launch your postcard campaign. The system will check to make sure you’ve completed all of the other pre-launch steps, and will indicate steps that still require action.

The system will then analyze and de-dupe the lists you’ve selected to determine the overall campaign list(s) size. You will be prompted to make a postcard purchase based on your overall campaign size.

Once the purchase has been made you will return to the Launch page to see the “Launch Campaign” button at the bottom left. Once this button is clicked your postcard campaign will move to the VR Statistics section with a status of “Processing.” Up until the time your postcard campaign begins processing (i.e. launch date), you can un-launch the campaign, continue editing and re-launch.

Postcard Purchases

The only costs associated with VerticalResponse postcard campaigns relate to the number of postcards that you send. There are various pricing levels depending on the size of the list(s) you have selected to mail to. You will be prompted to pay with your credit card on the launch page.

Postcard purchases are actually “pre-authorizations” on your credit card until your postcard is processed, when at that time they become “post-authorizations”. If a postcard campaign is un-launched and never re-launched, the pre-authorization will eventually expire and you will never be charged.

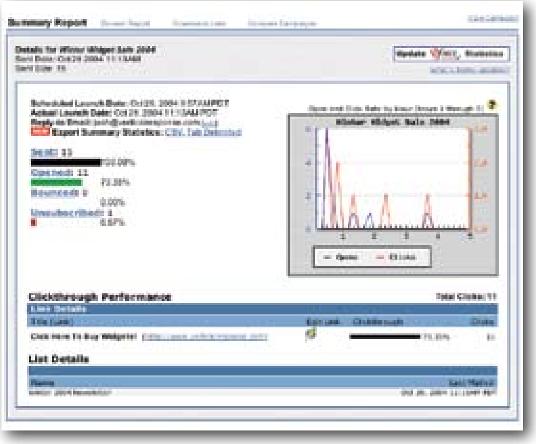
For more information on VR Postcard purchases and instant quotes please visit:
http://www.verticalresponse.com/pricing/pc_pricing.html

VR Statistics

The VR Statistics tab houses all of your sent email and postcard campaigns. To the right of each campaign name you can view some top-level campaign statistics such as: percentage opened, clicked, bounced, and unsubscribed. Due to the lack of data VerticalResponse is able to collect on your postcard campaigns, the VR Statistics tab focuses heavily on the email campaigns. By clicking the hyperlinked email campaign name you’ll gain access to additional reporting functions as outlined below.

Summary Report

The Summary Report provides a general overview of your email campaign statistics. Some of the features to note are:



Opens/Clicks Graph

Displays the Open & Click rates over the first 24 hours after launch

Click-through Performance

Listing of all trackable links and their click-through percentages

List Details

All mailing lists sent with the campaign

Another important feature on this page is the Update force Statistics button, appearing just above the Opens/Clicks Graph. This feature will send post-launch updates back to the Leads and Contacts included on your sent campaign.

Updating Standard Objects in salesforce.com

If the list you’ve mailed to is associated with a salesforce.com Campaign (type= Salesforce Campaign), the Campaign History will be updated for Leads and Contacts and will reflect their current member status at the time of update. The possible values are: Sent, Bounced, Opened, Clicked and Unsubscribed.

If the list you’ve mailed to is NOT associated with a salesforce.com Campaign (type=Salesforce Mass Email), then Leads and Contacts will have their Activity History updated at the time of launch, but because there is no Campaign affiliation in salesforce.com, there is no way to create new member status values.

Regardless of list origin, VerticalResponse will mark the “Email Opt-Out” field for any Lead or Contact who has unsubscribed from your email campaigns. Leads and Contacts with this status are prevented from ever being mailed again and are excluded from the query result set for future list builds.

NEW: Updating Custom Objects in salesforce.com

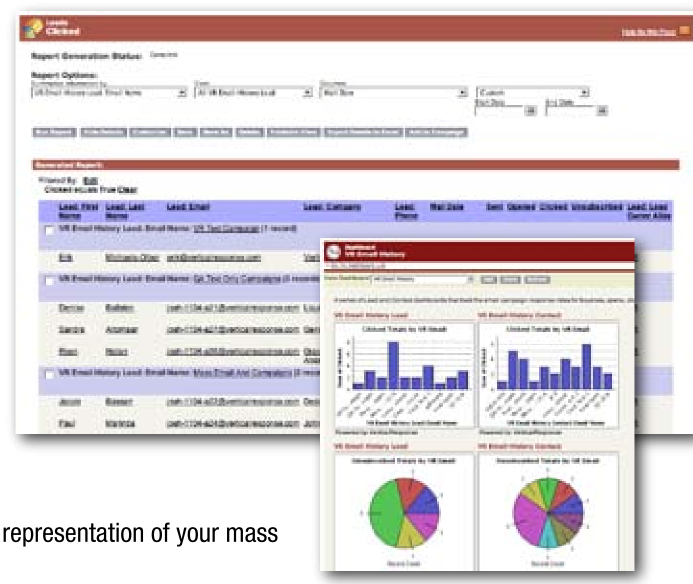
In addition to the standard object updates previously noted, VerticalResponse for AppExchange now provides enhanced visibility of post-launch statistics through the introduction of our own custom reporting objects. **VR Email History** objects will be available for both Leads and Contacts and will log statistics for "Sent", "Bounced", "Opened", "Clicked" and "Unsubscribed." This data be presented to the user on the record layout page and never overwritten as statuses change with time. VR Email History will also list the specific links that a Lead or Contact clicked on for a given campaign as well as display a "live view" (i.e. Campaign Preview) of the email content that they received.

The custom objects will be imported when you install the newest version of our application and you can simply edit your Lead and Contact Page Layouts to have these appear as Related Lists.

NEW: Custom Reports & Dashboards

All of the data found on the VR Email History objects for Leads & Contacts can be further analyzed and monitored through custom reports and dashboards.

Isolate specific records who've taken an action (i.e. opened, clicked) or run a follow up campaign to individuals who've been tagged as "Non-Responders" (no open, click, bounce, or unsubscribe). You'll be able to track all the response data for each mass emails you send on the individual record level and the entire campaign level.



With custom dashboards you can see an ongoing visual representation of your mass email performance.

Domain Report

With the Domain Report you are able to analyze your campaign statistics on a per domain level. This report is useful for both B2C and B2B mailers as it gives insight into the behavior of recipients at a certain ISP or at specific company. Use the column header links to sort and order the top 100 domains, by total or percentage, of the various statistics.

Download Lists

The following reports can be downloaded on a per campaign basis, in both CSV and Tab Delimited format:

- Bounces
- Openers
- Clickers (unique recipient clickers per link)
- Non-Responders (recipients who didn’t open, click, bounce, or unsubscribe)
- Unsubscribes

Compare Campaigns

Graphs and charts enable you to compare email campaign response metrics for up to 5 campaigns. All standard response statistics are included (opens, clicks, bounces, unsubscribes).

Download Global Bounces & Unsubscribes

There are two buttons displayed at the top of the VR Statistics tab, “Download Global Bounces File” and “Download Global Unsubscribes File”. These files will provide a listing of all bounces and/or unsubscribes from any campaign sent via VerticalResponse for AppExchange.

The timestamp and campaign that they bounced/unsubscribed from will be noted. Email addresses contained in these files are scrubbed out during list building to ensure you are only mailing to valid addresses of people who want to, and are able to, receive your email.

Additional Resources

Contact VerticalResponse

Email:	vip@verticalresponse.com
Telephone:	1-866-683-7842 (toll free)
Live Chat:	Located at the bottom of each VR tab

For more information, visit: www.verticalresponse.com/salesforce