

OpenMoves / SFDC Integration Job Aid

Overview

OpenMoves (OM) has developed an integration with Salesforce.com (SFDC). This integration allows:

- Leads to be marked in SFDC to receive tips or to be part of one or more email marketing campaigns. These leads will automatically be added to OM and added to the correct campaign.
- Users can review the results of email marketing campaigns directly from within SFDC.

Once an individual facilitator is setup for this process, all that they need to do is set the fields on lead or contact records in SFDC to assign a lead to the correct campaign. The rest of the process is automated.

This document is organized into three sections:

- [Adding Leads from SFDC to an OpenMoves eMail Marketing Campaign](#)
- [Reviewing the eMail Marketing Campaign Results in SFDC](#)
- [Configuring the OM/SFDC Integration](#)

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Adding Leads from SFDC to an OpenMoves eMail Marketing Campaign

Two fields are available from the Lead (or Contact) Details Page and from the Console for adding a lead to an OM email campaign:

- **eMail Marketing Campaign:** A multi-select picklist that allows you to add this lead to one or more email campaigns.
- **Tips from the Top:** A checkbox to send the lead a copy of Tips from the Top.

▼ Lead Tracking

Call Start Date ? 2/26/2010	eMail Marketing Campaign ? Drip Campaign ←
Total Calls Placed ? 6	Tips from the Top ? <input checked="" type="checkbox"/> ←
Response Type ? Telemarketing	Email Campaign Opened ? 3
Lead Source ? Networking	Email Campaign Link Clicked ? 5
Referred By ?	Not Interested Reason ?
Confirmation Bonding ?	Not Qualified Reason ?
Performance Guarantee ? <input type="checkbox"/>	Other Request ?

Clicking on the eMail Marketing Campaign field displays the following pop-up menu:



This column on the left displays the available options to select. The column on the right displays the options already chosen. To select an available option, click your mouse on the option on the left & click the top arrow button. This will move that selection from available to chosen. This allows you to add a lead to multiple email marketing campaigns.

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Currently the following eMail Marketing Campaign options are available:

- **Event Campaign:** campaign to drive prospects to a specific marketing event (e.g. GIM)
- **Drip Campaign:** Periodic topic-specific drip email to lead
- **Member Campaign:** campaign targeted specifically to members
- **Other Campaign:** A one-off campaign not covered in the options above

Other campaign types will be added to this list as needed.

Simply selecting the Tips from the Top checkbox or selecting one or more marketing campaigns will automatically add a lead to the respective email campaign (for users with the integration already configured). If you are using an email system other than OM, this process is not automated. Instead, you will need to periodically run a report of leads with the Tips from the Top and/or eMail Marketing Campaign fields set. You can then extract this report to a CSV file and load it into the email system that you use.

Once you have set one of these fields, you do not need to reset it after the lead is added to tips or to an email campaign. The OM system is smart enough not to add the same lead to a mailing multiple times.

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Reviewing the eMail Marketing Campaign Results in SFDC

Once OM adds a lead to Tips email or to an eMail Marketing Campaign, it updates the lead in SFDC with status information. OM updates SFDC when one of four events occur:

- The email bounces
- The lead unsubscribes
- An eMail is Opened
- An eMail Link is Clicked

Each time one of these events occurs, OM creates a completed activity record for the lead in SFDC that reflects this event. Specifically:

- If the lead unsubscribes, an activity with subject “Unsubscribe” and the campaign name is created. In addition, SFDC automatically checks the **Email Opt Out** field on the lead record.
- If the email bounces, an activity with subject “Email Campaign Bounce” and the campaign name is created and the **Email Bounced Date** field is set on the lead record.
- If the lead opens the email, an activity with subject “Email Campaign Opened” with the campaign name is created. Each time the email is opened, a new “email opened” activity is created.
- If the lead clicks on a link from the email, an activity with subject “Email Campaign Link Clicked” with the campaign name is created. Each time an email link is clicked, a new “email link clicked” activity is created.

See the Activity History list in the following screen shot as an example:

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Email Campaign Opened: "Copy of OM Salesforce 0317 Tips List Test"	✓	3/17/2010	Corporate Marketing	3/17/2010 9:00 AM
Edit Del	Email Campaign Link Clicked: "http://www.thealternativeboard.com"	✓	3/17/2010	Corporate Marketing	3/17/2010 9:00 AM
Edit Del	Email Campaign Link Clicked: "http://www.salesforce.com/"	✓	3/17/2010	Corporate Marketing	3/17/2010 9:00 AM
Edit Del	Email Campaign Link Clicked: "http://www.google.com/"	✓	3/17/2010	Corporate Marketing	3/17/2010 9:00 AM
Edit Del	Email Campaign Link Clicked: "http://www.openmoves.com"	✓	3/17/2010	Corporate Marketing	3/17/2010 9:00 AM

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As an email marketing event proceeds, this can potentially create a lot of activity records to wade through. To make it easier to track that emails are opened and links clicked, two lead tracking fields have been created:

- Each time the lead opens a *campaign or tips email*, a field named **eMail Campaign Opened** is incremented on the lead record.
- Each time the lead clicks on a link from a *campaign or tips email*, a field named **eMail Campaign Link Clicked** is incremented on the lead record.

▼ Lead Tracking

Call Start Date 2/26/2010	eMail Marketing Campaign Drip Campaign
Total Calls Placed 6	Tips from the Top <input checked="" type="checkbox"/>
Response Type Telemarketing	Email Campaign Opened 3
Lead Source Networking	Email Campaign Link Clicked 5
Referred By	Not Interested Reason
Confirmation Bonding	Not Qualified Reason
Performance Guarantee <input type="checkbox"/>	Other Request

To make it as easy as possible to locate those lead records that have opened emails or links clicked, a report has been created in the Facilitator Reports folder named: **eMail Mrktg: Leads Opened/Clicked Email**. This report returns all records where either of these tracking fields is greater than zero. For example:

Leads Opened/Clicked Email

Filtered By: 1 OR 2 [Edit](#)

1. Email Campaign Opened greater than 0

2. Email Campaign Link Clicked greater than 0

First Name	Last Name	Company / Account	Lead Status	Email Campaign Link Clicked	Email Campaign Opened	Tips from the Top	eMail Marketing Campaign	Phone	Email	Lead ID
Herman	Campbell	Adease Media Research Svc	Future Interest	-	2	<input checked="" type="checkbox"/>	-	(416) 423-2010	hcampbell@adeasemediaresearch.com	00Q8000000XVPG
Michael	Spenser	Tax Audit Service	Not Reached: Follow Up	5	3	<input checked="" type="checkbox"/>	Drip Campaign	(303) 254-2800	mspenser@taxcomp.com	00Q8000000b0ZaJ
Test	Lead3	Lead Assignment Testers	Closed Member	2	1	<input type="checkbox"/>	-	(303) 555-1212	nomail@tabboards.com	00Q8000000afJ0e
Grand Totals (3 records)					7	6				

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Configuring the OM/SFDC Integration

In order to utilize the OM/SFDC integration, you need to contact TAB and OM to perform configuration activities:

- OM will take care of the OM configuration for you. To initiate this:
 - Contact Rose Lanaro at rose@openmoves.com
 - Contact Ed Conolly at ed@openmoves.com
 - Or call 631.423.3182
- You'll need to give OM your SFDC username, password and security token. To get your security token:
 - If you already have syncing setup between Outlook and SFDC, you should have your SFDC security token in an email. Forward this to OM.
 - If not, then you can access your security token as follows:
 - Click the Setup link in the upper right of any SFDC page.
 - In the **My Personal Information** section, click the **Reset your security token** link.
 - From the displayed page, click the **Reset Security Token** button.
 - This will email you your security token, which you can forward to OM.
- You'll also need to have several reports installed in your **My Personal Custom Reports** folder. These reports are in the **eMail Marketing Reports** folder. You do not need to run these reports directly. Instead, OpenMoves uses them to pull the appropriate records into OpenMoves to add them to the correct campaign. They are named:
 - **Contacts: Add to Drip Campaign**
 - **Contacts: Add to eMail marketing Campaign**
 - **Contacts: Add to Tips from the Top**
 - **Leads: Add to Drip Campaign**
 - **Leads: Add to eMail Marketing Campaign**
 - **Leads: Add to Tips from the Top**
- If you are not familiar with how to install these reports in your My Personal Custom Report folder, send an email to itsupport@thealternativeboard.com with the subject **Install OpenMoves reports for my SFDC account** and we will install them.