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ETRICKLER V1.2
APPLICATION SETUP & USER GUIDE

INTRODUCTION

The purpose of this document is to provide the System Administrator with information needed to configure and use the Veltig eTrickler Application.

The eTrickler App allows you to manage the delivery of campaign specific emails on a scheduled basis. Emails are sent based on the date a Lead or Contact is added to a campaign. The eTrickler "send emails" job is automatically run on a daily basis, depending on the Schedule Time to Run configuration.

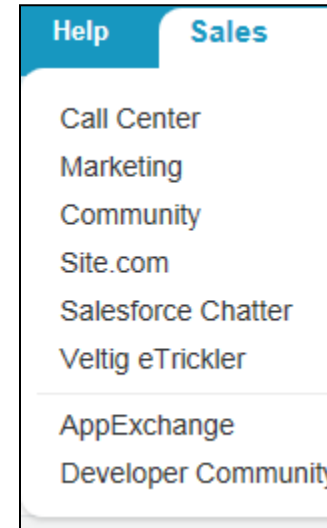
Lead and Contact records should be associated with an active campaign, which has an eTrickler campaign configured, in order for the recipient to be eligible to receive an eTrickler email.

The sender of the email can be based on the user that owns the campaign record or it can be sent from a specific email address.

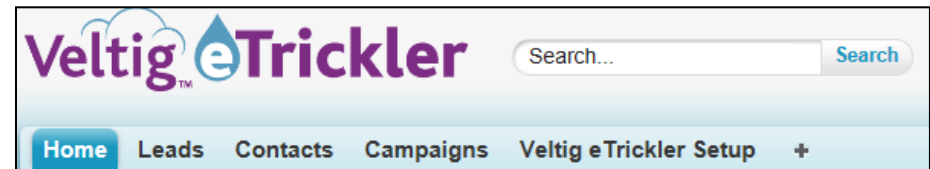
This version of the eTrickler can send up to 1,000 emails per a 24-hour period. This limit is based on the Salesforce Apex governor limitation.

ACCESSING THE APP

Select the **Veltig eTrickler** application from the Application Menu Pick list.



From the available tabs displayed in the **eTrickler app**, select the **Veltig eTrickler Setup** tab to access the setup page.



The simple setup page has only two items that need to be configured before the application can be used:

1. Choose Org Wide Email Options
2. Schedule Time to Send

CONFIGURING THE APP

1. Choose the Sender Address.

An **Organization Wide Address** is required for the application to send out the email tricklers.

You can check for existing Org Wide email addresses through the setup menu:

Setup → Administer → Email Administration → Organization Wide Addresses

If existing Org Wide email addresses do exist, they will be displayed in the setup menu, as well as in the dropdown on the eTrickler setup page under **Choose Org Wide Email Options**.

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date
Edit Del	Veltig Sales Team	sales@veltigoconsulting.com	All Profiles	Verified	4/21/2013

On the eTrickler you can either:

- Select **Use default Org Wide Email addresses based on the Campaign Owner email address**. If you select this default option, you have to create an Organization Wide email address for every user who can possibly own a campaign record.

If no Org Wide email addresses exists, and you try to **Save** without configuring an Org Wide email address, the following error message will be received:

In this case, follow the instructions below to create an Org Wide Email address.

- Create a specific Organization Wide address that can be used to send ALL emails for ALL tricker emails.

To create Organization Wide Addresses, go to:

Setup → Administer → Email Administration → Organization Wide Addresses

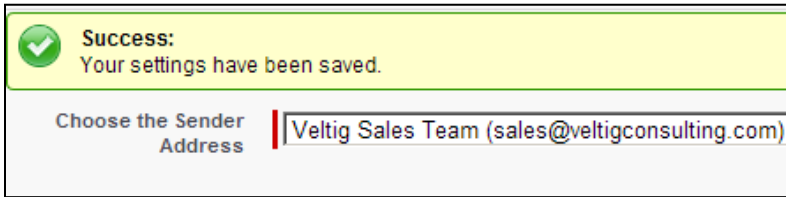
In the **Display Name** field, enter the name as you would like it to appear to the email recipients. In the **Email Address** field, enter the email address from which the emails will be sent, and click **Save**.

If you do create any new Org Wide Email Addresses, an email will be generated to the person or department whose name has been specified in the **Email Address** field above.

The recipient will need to click on the link contained in the verification email to activate the Org Wide Email address, before you can add members to a campaign.

Once you have created the Org Wide email address, it will be eligible for selection in the drop down list on the eTrickler as displayed below:

From the dropdown list, select the Sender Address and click Save. A confirmation message will be displayed:



Success:
Your settings have been saved.

Choose the Sender Address:

If you do not create an Org Wide Email Address, campaign emails will not be sent, and the following error will be generated in an email to the lead or contact as set up in the Error Notification information.:

"Lead John Smith could not be processed by the Email Trickler ETC-0055 because of the following error:

Lead Owner doesn't have an org wide email address configured.

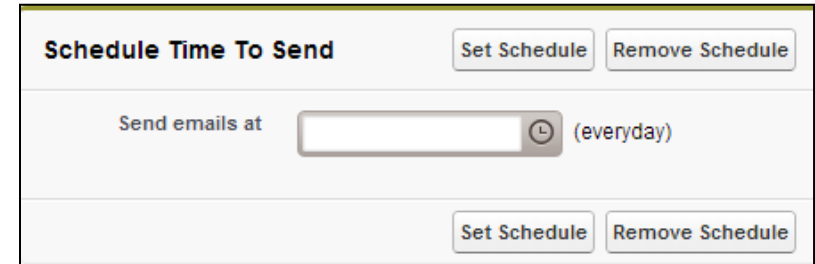
Click below to view the lead record
<https://na9.salesforce.com/00xxxxx>"

If this error message is received, ensure that you create an Org Wide Email address and set this as the email address to use for the Campaign(s).

For additional information on Organization Wide Email Addresses, refer to Salesforce Help.

2. Scheduling the Time to Send.

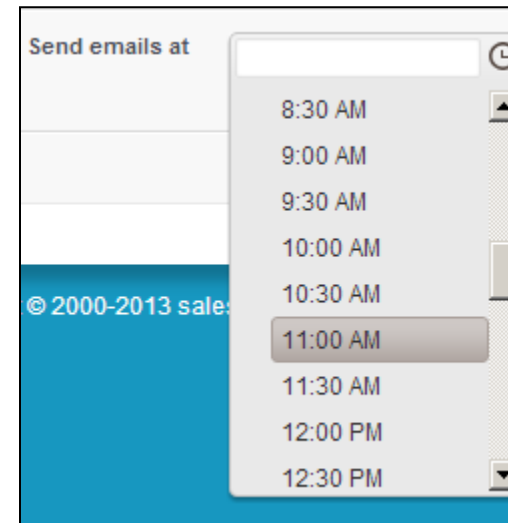
The "send emails" job automatically runs each day once it is scheduled. This job will send up to 1,000 emails in a 24 hour period. To schedule the time of day for which the job is to run, select **Send emails at** in the **Schedule Time to Send section**.



Schedule Time To Send

Send emails at (everyday) 

Select the Clock icon to see a list of available times that the job can be scheduled to run each day.



Send emails at 

- 8:30 AM
- 9:00 AM
- 9:30 AM
- 10:00 AM
- 10:30 AM
- 11:00 AM**
- 11:30 AM
- 12:00 PM
- 12:30 PM

Choose the time you want the job to run, and select **Set Schedule** to save your selection.

Choose Org Wide Email Options
Save Cancel


Success:
The email trickler job has been scheduled.

Choose the Sender Address
Veltig Sales Team (sales@veltigconsulting.com)
Save Cancel

Schedule Time To Send
Set Schedule Remove Schedule

Send emails at
10:00 AM (everyday)
Set Schedule Remove Schedule

Should you wish to cancel the job from running, select the **Remove schedule**. A confirmation message will be displayed.

3. Adding Fields and Related Lists.

The following fields and related lists need to be added to the page layouts in order to use the application:

Lead Object

- Cancel Email Tricklers Checkbox

Contact Object

- Cancel Email Tricklers Checkbox

Campaign Object

- Disable Trickler Activities Checkbox
- Email Tricklers Configurations Related List

Campaign Members Object

- Cancel Email Tricklers

SETTING UP CAMPAIGNS

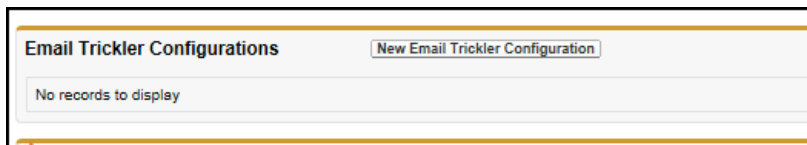
1. Configuring the Email Trickler within a Campaign Record.

Email Trickler Configuration (ETC) records are related to Campaign records. They can be created and edited via the Campaign records related list once added to the page layout.

The ETC header record allows you to configure:

- Whether an activity record is created each time an email is sent.
- Which error notification template is used for lead records.
- Which error notification template is used for contact records.
- Which System Administrator(s) should be notified if an error is encountered.

Select and scroll down to the Email Trickler Configurations related list. Select New Email Trickler Configuration.



The **Email Trickler Configuration** Edit page will be displayed.

This page allows you to:

- Disable Trickler Activities for this specific campaign. If checked, an activity record will NOT be created for each email sent.
- Select a Template for both the Lead and Contact Error Notifications. Note that currently only Visual Force Templates are supported for error notifications.
- Select the System Administrator user(s) to which error notifications should be sent.

Email Trickler Configuration Detail		Edit	Delete	Clone
Email Trickler Configuration Name	ETC-0000			
Campaign	Test			
Lead Error Notification Template	Lead Error			
Contact Error Notification Template	Contact Error			
Send Error Notification To	Denis Horgan			
Created By	Denis Horgan, 4/21/2013 3:28 PM			

Click **Save** to record your changes, and the ETC header record will now be created and displayed in the ETC Related List.

2. Setting up the Steps which the campaign should follow.

Once the ETC header record has been created, you can now add your email trickler **Steps**. A step is the rule(s) that is followed for the "sending of the email".

From the ETC record, select **New Step**.

Steps	New Step
No records to display	

The **Step Configuration** Edit page will be displayed.

Step Edit		Save	Cancel
Information			
Email Trickler Configuration	ETC-0055		
# of Days After			
Lead Template	-- None --		
Contact Template	-- None --		
Description			

Enter a numeric value in the **# of Days After** field. The value entered determines when that particular email will be sent based on the number of days after a lead or contact has been added to the campaign.

NOTE: **0** will cause the step to be initiated as soon as a record is added to the campaign.

Select the **Lead Template** and **Contact Template** the system should use for this particular step.

Use the description field to enter any information that you may need to remember about this step within the campaign.

After creating each step, click **Save** to record your changes.

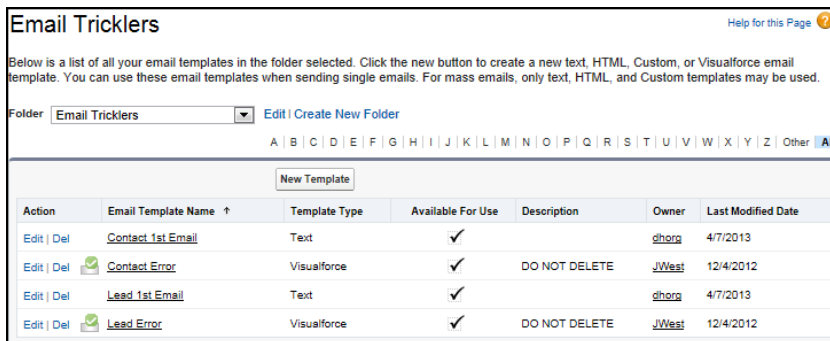
For an email template to be selectable from the **ETC** page and the **Steps** page, the email template must reside in the custom **Email Tricklers** templates folder.

Should you need to make any changes to Email Templates, follow the path below:

Setup → Administer → Communication Templates → Email Templates



Select **Email Tricklers** from the Folder Pick list to display a list of existing Email Templates.



NOTE: Email tricklers will not be sent unless the Campaign is **Active**.

ADDING MEMBERS TO A CAMPAIGN

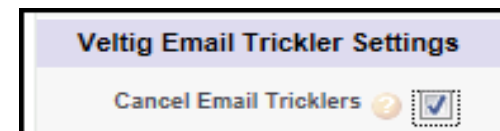
After the Campaign has been configured, members that are added to the Campaign will receive emails as set up within the steps configured within the campaign.

Campaign Members can be added either through the **Manage Members** function within the Campaign setup, or by using the **Add to Campaign** function within the Lead Record.

MONITORING & MAINTAINING THE CAMPAIGN

1. Removing Leads or Contacts from Email Tricklers.

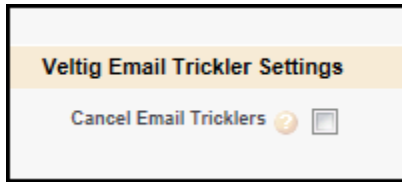
At any time, a user can stop all Email Trickler Campaigns from a Lead or Contact Record, by simply checking the **Cancel Email Tricklers** checkbox on their individual record.



ALL future email tricklers for ALL campaigns will be cancelled.

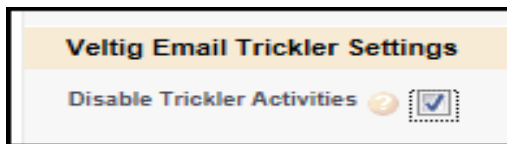
Removing Leads or Contacts from an Individual Campaign. At any time, a user can stop Email Tricklers for a specific campaign for either a Lead or Contact Record simply by selecting the **Cancel Email Tricklers** checkbox on the Campaign Members edit page.

Only future email tricklers for this campaign will be cancelled.



2. Disabling the Trickler Activity on Campaign Records.

At any time, a user can stop the system from creating an activity record for a specific campaign by checking the **Disable Trickler Activities** checkbox on the Campaign record.



3. Email Tricklers Error Handling.

If one of the following conditions is met when email tricklers requests are being processed, an error message will be generated and sent to the system administrators configured to receive the notifications:

- Lead or Contact owner is inactive
- Lead or Contact is owned by a queue

Campaign record is owned by a user who does not have an org wide address configured and the email trickler org wide setting is **Use default Org Wide Email addresses based on the Campaign Owner email address.**

ADDITIONAL STEPS FOR PROFESSIONAL EDITION USERS

Professional Edition Users will need to perform these 2 additional steps to enable eTrickler for their organization.

1. Add 3 fields to the "Email Trickler Configuration Page Layout".

- Error Notification Template Id
- Contact Error Notification Template Id
- ErrorNotificationIds

Error Notification Template Id	Sample Error Notification Template Id
Contact Error Notification Template Id	Sample Contact Error Notification Template Id
ErrorNotificationIds	Sample ErrorNotificationIds

2. Add 2 fields to the "Step Page Layout".

- Contact Template Id
- TemplateId

Contact Template Id	Sample Contact Template Id
TemplateId	Sample TemplateId

For both Steps 1 and 2, the fields can be placed anywhere on the page layout and will not be editable. However, they are required on the page for Professional Edition Users due to security requirements.