How to Guide

After installing the eLoop package in your SalesForce account, you need to walk through a few steps to set up your individual account. This document will help you enable your SalesForce account to communicate with your eLoop account.

If you have not yet installed the app in your SalesForce account, please go back to the installation guide or contact Gold Lasso for assistance at SALESFORCE@goldlasso.com.

Linking SalesForce and eLoop Accounts

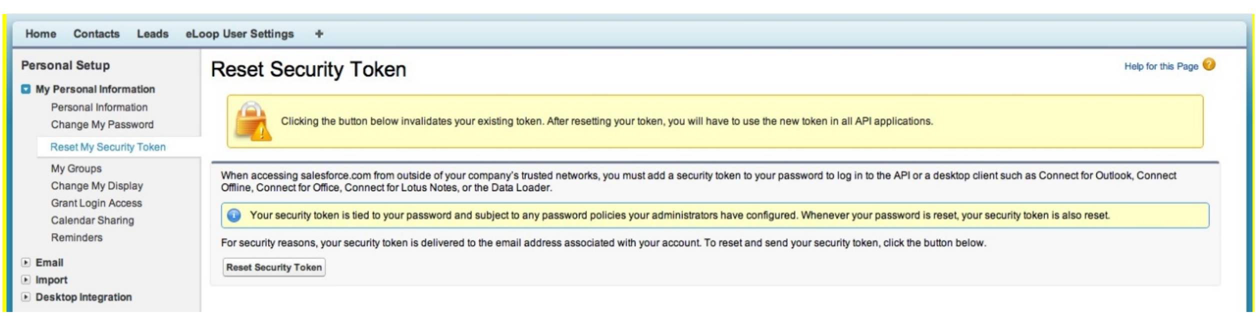
To complete the individual account synching steps, you will need the following information handy:

a) Your SalesForce login information
b) Your SalesForce security token
c) Your eLoop login information
d) Your eLoop security token

If you have this information, you may skip to the section labeled "**Linking Accounts**" below. If you do not know the security tokens listed above, please walk through the following steps:

SalesForce Security Token:

1. Click on your name at the top right of the screen and choose "Setup" from the drop down menu.
2. Click the "My Personal Information" option from the right navigation bar.
3. Choose the "Reset Security Token" option from the sub menu.



4. Click the "Reset Security Token" button to re-generate your API key and send it to you via email.

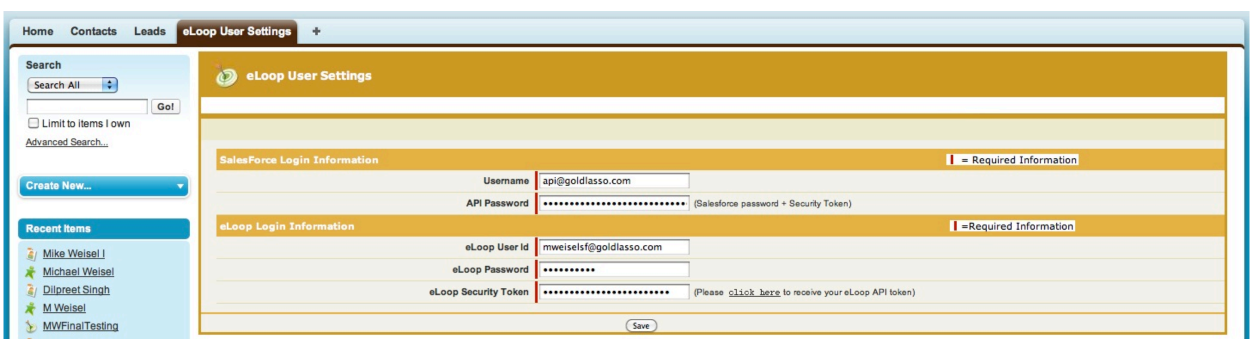
eLoop Security Token:

Click the link to the right of the input box to have it sent to you via email. You will need to be logged into your eLoop account.

Linking Accounts

With logins and security tokens on-hand, enter them into SalesForce to link your accounts:

1. Choose Gold Lasso eLoop from the Force.com App Menu, located at the top right of your screen. This menu often defaults to "Sales."
2. Click the "eLoop User Settings" Tab.



3. In the top section labeled "SalesForce Login Information" enter your SalesForce Username and the API Password. The API password is made up of your SalesForce password + your security token.

   Example:
   If your password is "pass12345" and your security token is "RTBAJjlFn9jkDQA12d4pHGE2O"
   Your API Password Should Look like: "pass12345RTBAJjlFn9jkDQA12d4pHGE2O"

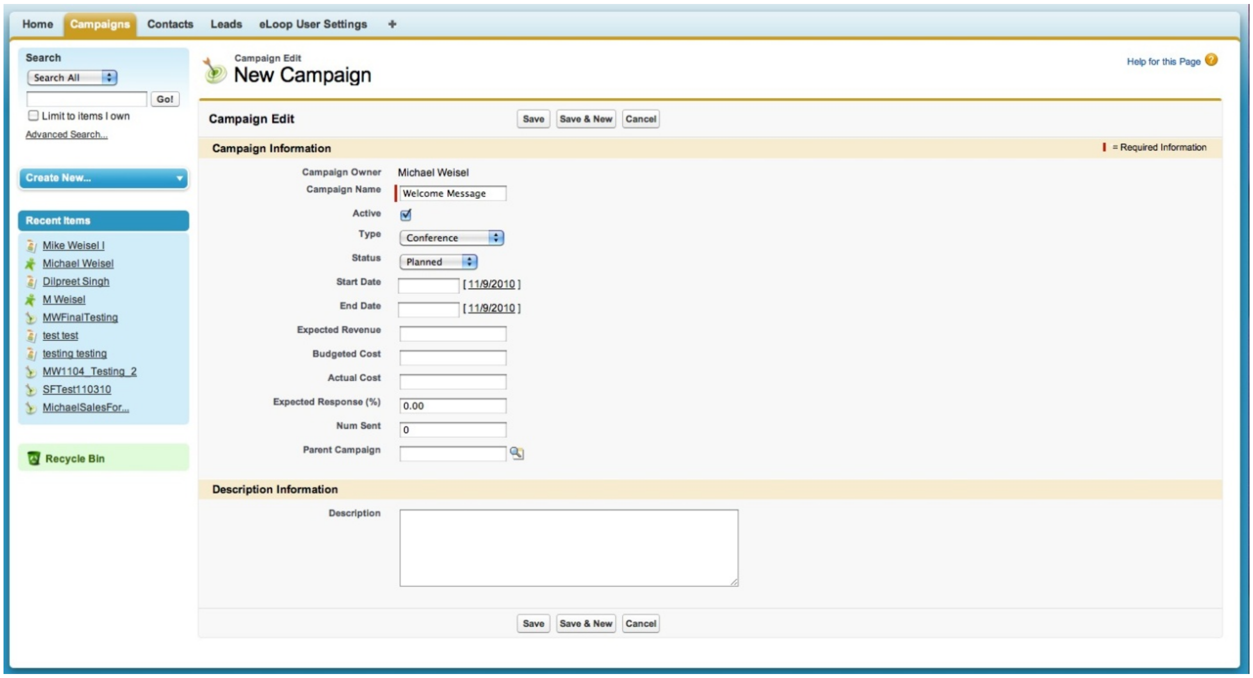
   In the lower section labeled "eLoop Login Information" enter your eLoop User Id, your eLoop Password, and your eLoop Security Token.

4. Click "Save." *Note: API is not enabled for SalesForce free trial accounts.*

Congratulations! You are now ready to send a campaign.

Sending a Campaign to Multiple People

1. Choose the “Campaigns” tab from the top navigation and choose the “New” button.



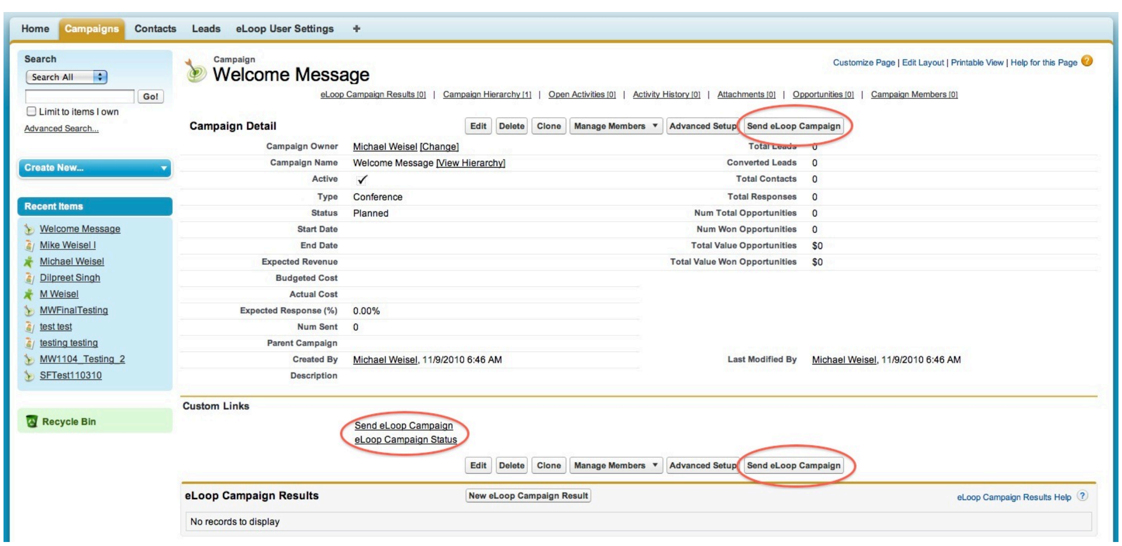
2. Name your campaign in the “Campaign Name” field (ONLY REQUIRED FIELD).

3. Enter any other information as necessary for your organization.

4. Check the box for “Active” (REQUIRED FOR CAMPAIGN TO EXECUTE)

5. Click the “Save” button to take you to the Campaign Detail page.

6. Click the “Send eLoop Campaign” button.



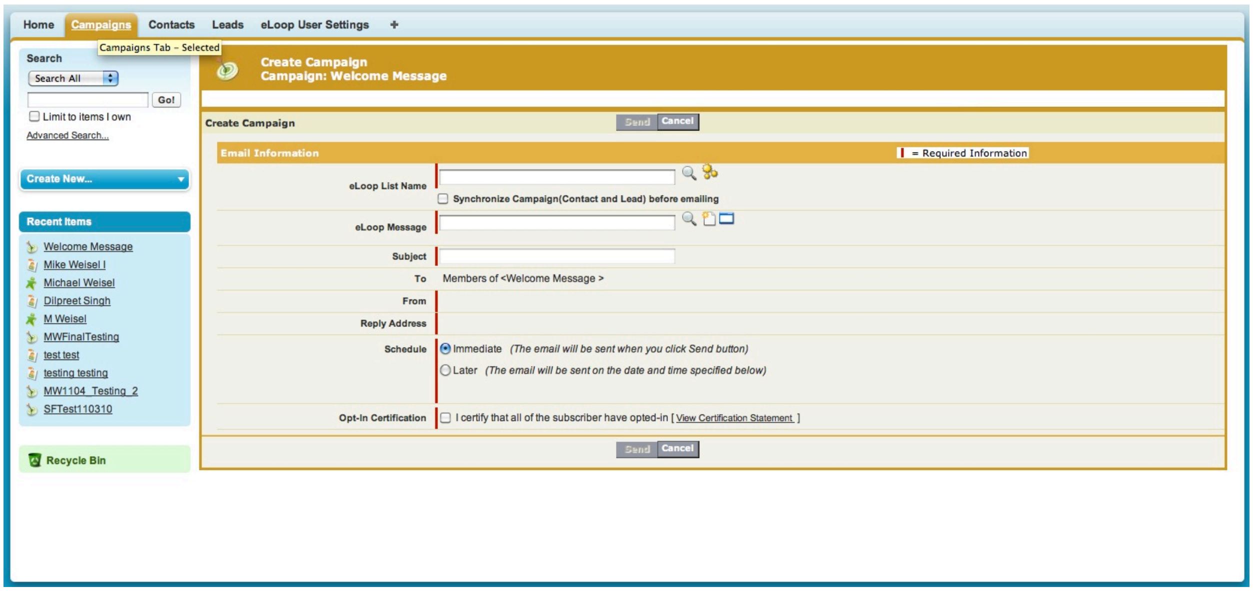
5. Choose the attributes to create your campaign. Below is a list of the icons and what they do.

 - Search Lists or Search Messages (Used for choosing an existing eLoop List or Message)

 - New List (Used for creating a new blank eLoop list)

 - New Message (Used for logging in to the eLoop message section to create a new message)

 - Message Preview (Used for previewing a message in both HTML and Text format)

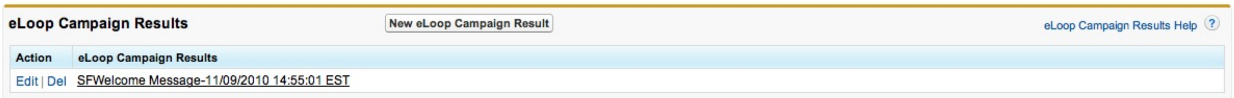


NOTE: Use the "Synchronize Campaign" option only if you have manually added SalesForce Contacts or Leads to your campaign through the "Campaign Members" section in the previous step.

5. Once you have chosen the attributes for your campaign, check the "Opt-In Certification" box to certify that all of the subscribers in that list have opted-in. Once the information has been verified, click the "Send" button to execute your campaign.

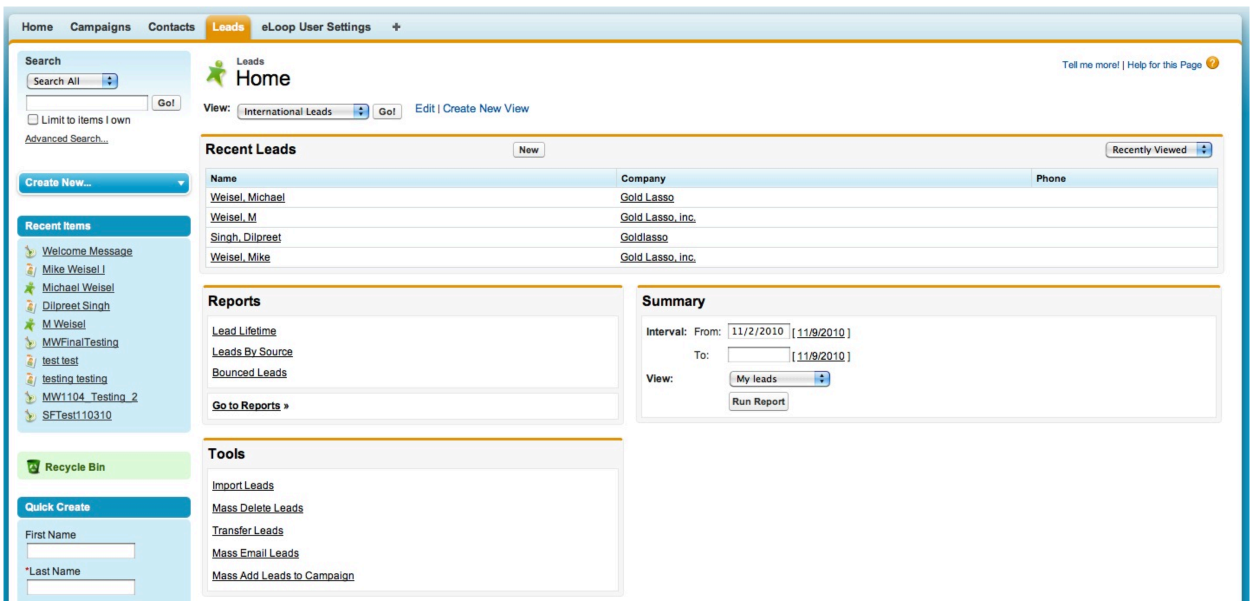
   Your screen will refresh once the campaign has been processed, and you will then see the following screen. Some browser versions might not automatically refresh, however you may navigate away from this page without causing any campaign interruption.

NOTE: If you click on the “click here” link after your campaign has been processed, it will take you to the “Campaign Details” page. From there you can click on the Campaign listed in the “eLoop Campaign Results” section to view the statistics for that campaign.

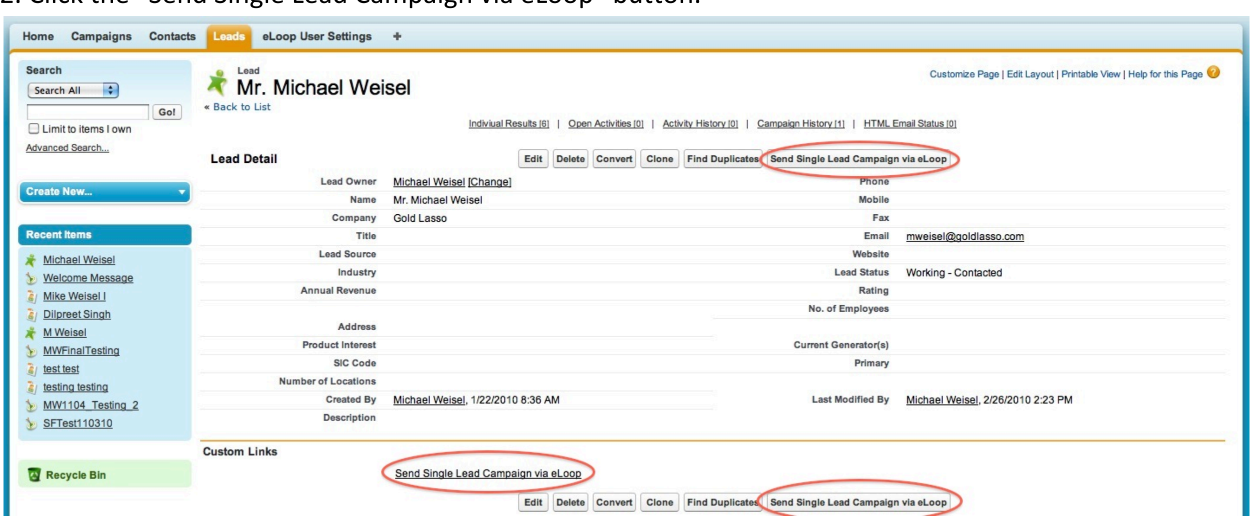


Sending a Single Lead Campaign

1. To send a campaign to an individual sales lead, choose the “Leads” tab from the top navigation and choose a lead that you would like to send a message to.



2. Click the “Send Single Lead Campaign via eLoop” button.

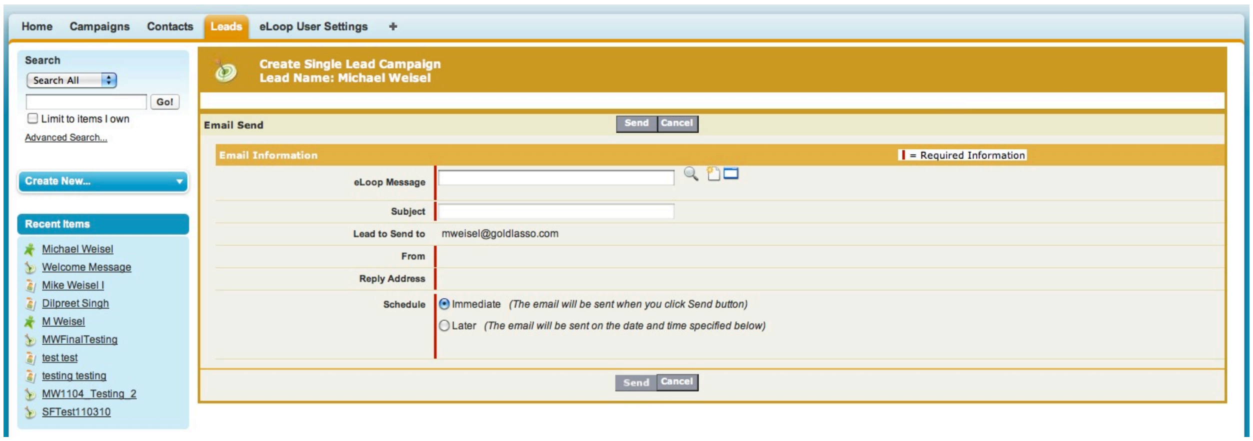


3. Choose the attributes to create your campaign. Below is a list of the icons and what they do.

 - Search Messages (Used for choosing an existing eLoop Message)

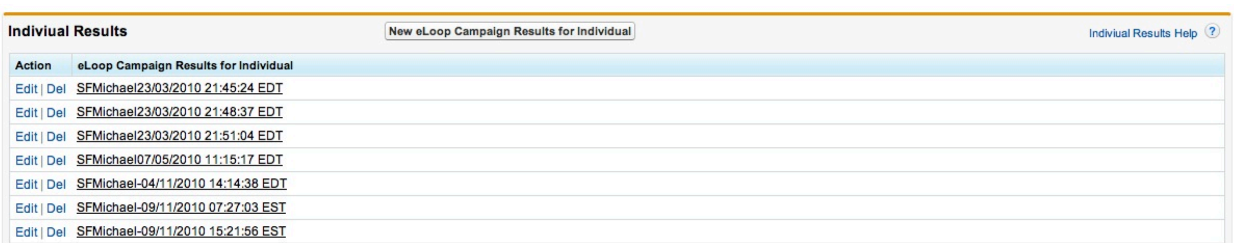
 - New Message (Used for logging in to the eLoop message section to create a new message)

 - Message Preview (Used for previewing a message in both HTML and Text format)



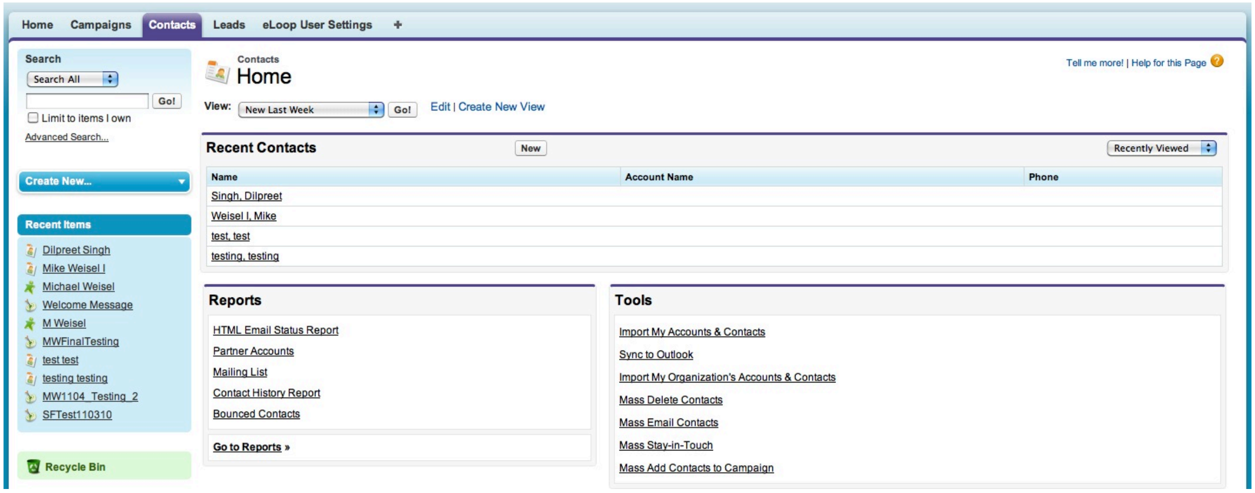
4. Once you have chosen the attributes for your campaign, click the “Send” button to execute your campaign.

NOTE: If you click on the “click here” link after your campaign has been processed, it will take you to the “Lead Details” page. From there you can click on the Campaign listed in the “Individual Results” section to view the statistics for that campaign.

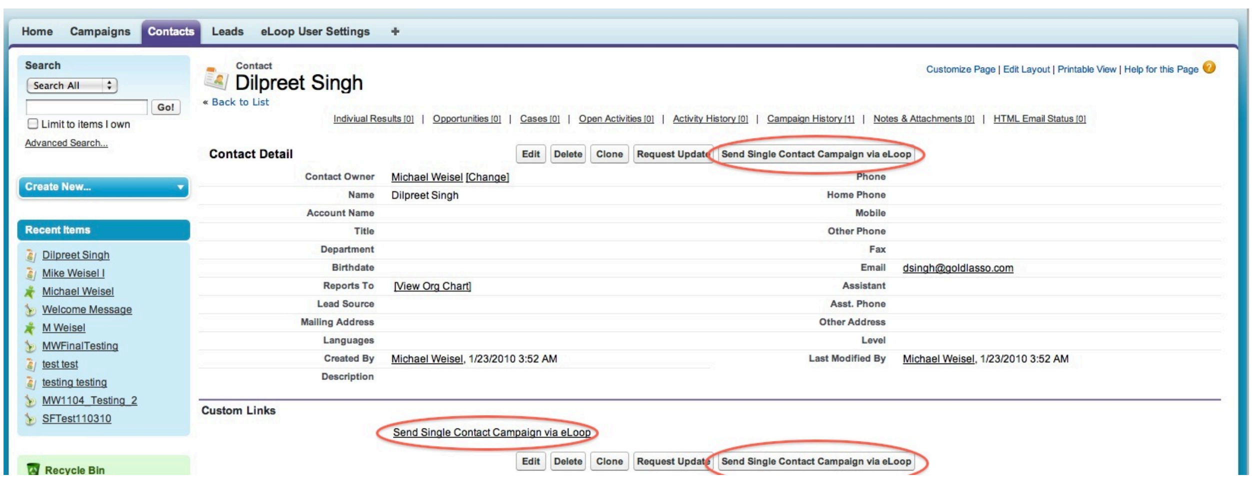


Sending a Campaign to a Single Contact

1. To send a campaign to a single individual listed under your "Contacts" database, choose the "Contacts" tab from the top navigation and choose a Contact that you would like to send a message to.



2. Click the "Send Single Contact Campaign via eLoop" button.

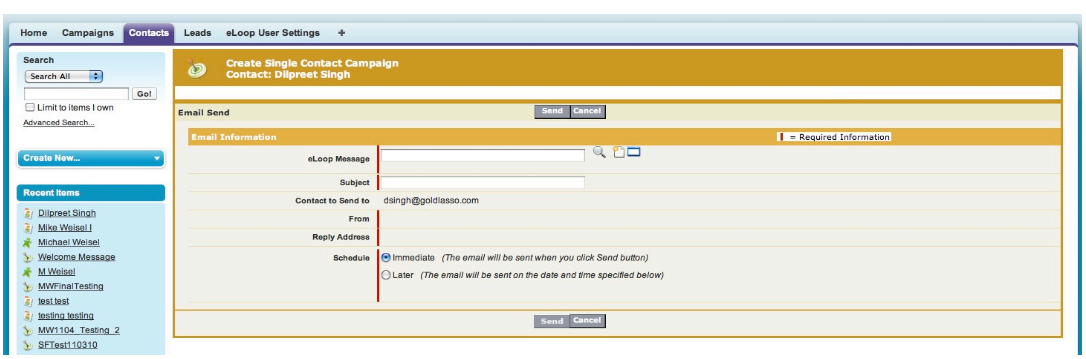


3. Choose the attributes to create your campaign. Below is a list of the icons and what they do.

 - Search Messages (Used for choosing an existing eLoop Message)

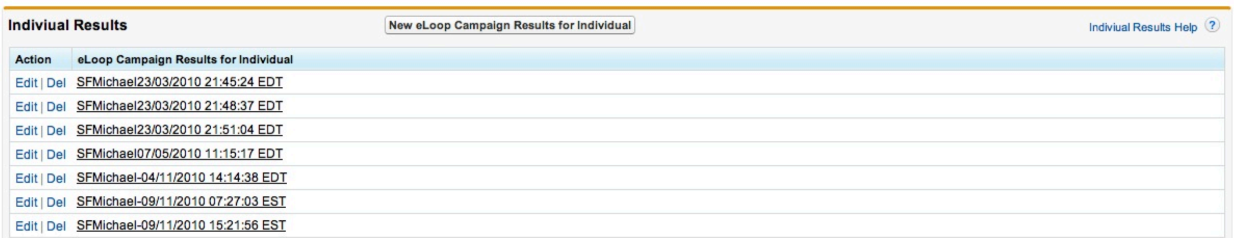
 - New Message (Used for logging in to the eLoop message section to create a new message)

 - Message Preview (Used for previewing a message in both HTML and Text format)



4. Once you have chosen the attributes for your campaign, click the “Send” button to execute your campaign.

NOTE: If you click on the “click here” link after your campaign has been processed, it will take you to the “Contacts Details” page. From there you can click on the Campaign listed in the “Individual Results” section to view the statistics for that campaign.



Reports

To view the custom Gold Lasso Reports, choose the “Reports” tab from the top navigation bar and scroll down to the section called “Gold Lasso eLoop Reports.”