



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

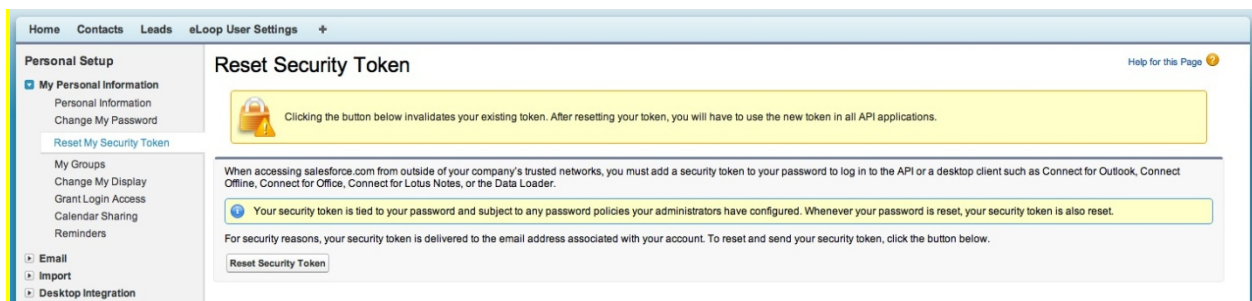
To complete the individual account synching steps, you will need the following information handy:

- 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.

Security Token for eLoop API

Note:
Security Token is required for using eLoop API on HTTP protocol.
Please click on the button below to send security token to your email address.

[Send Security Token](#) [Reset & Send Security Token](#)

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.

Home Contacts Leads eLoop User Settings +

Search
Search All Go
☐ Limit to items I own
Advanced Search...
Create New...

Recent Items
Mike Weisel
Michael Weisel
Dilpreet Singh
M Weisel
MWFinalTesting

eLoop User Settings

SalesForce Login Information Required Information

Username

API Password (Salesforce password + Security Token)

eLoop Login Information Required Information

eLoop User Id

eLoop Password

eLoop Security Token (Please [click here](#) to receive your eLoop API token)

Save

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 “RTBAJlFn9jkDQA12d4pHGE2O”

Your API Password Should Look like: “pass12345RTBAJlFn9jkDQA12d4pHGE2O”

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.

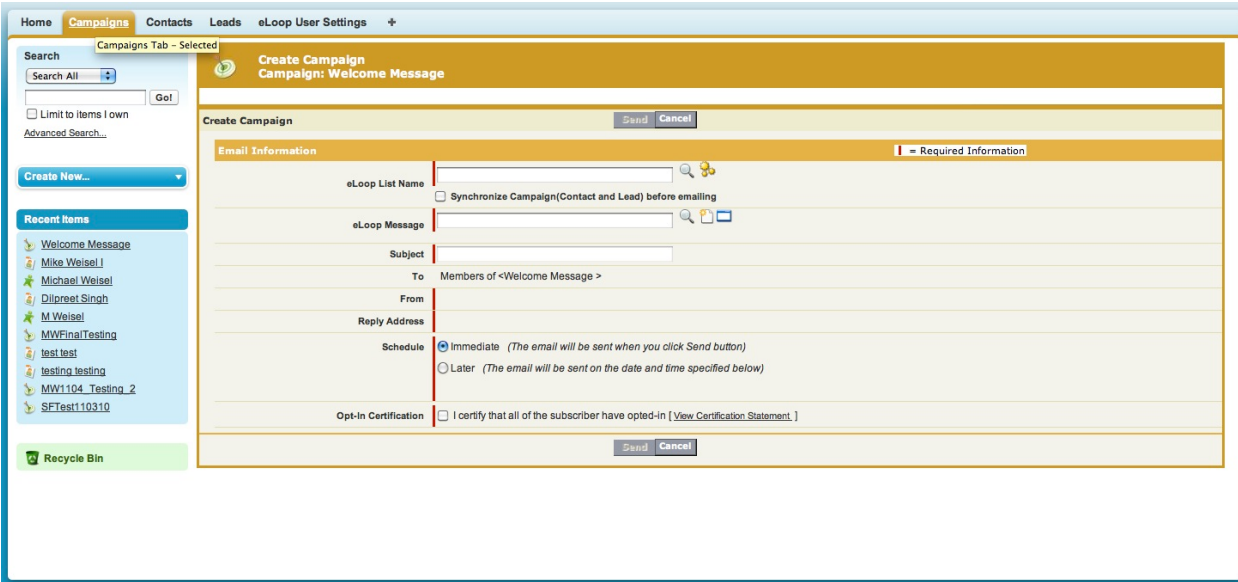
The screenshot shows the 'New Campaign' form in the eLoop system. The top navigation bar includes 'Home', 'Campaigns', 'Contacts', 'Leads', and 'eLoop User Settings'. The left sidebar has a 'Search' section with a 'Search All' dropdown and a 'Go!' button, and a 'Recent Items' list. The main form is titled 'New Campaign' and has a 'Campaign Edit' header with 'Save', 'Save & New', and 'Cancel' buttons. The form is divided into two sections: 'Campaign Information' and 'Description Information'. The 'Campaign Information' section includes fields for 'Campaign Owner' (Michael Weisel), 'Campaign Name' (Welcome Message), 'Active' (checked), 'Type' (Conference), 'Status' (Planned), 'Start Date' (11/9/2010), 'End Date' (11/9/2010), 'Expected Revenue', 'Budgeted Cost', 'Actual Cost', 'Expected Response (%)' (0.00), 'Num Sent' (0), and 'Parent Campaign'. The 'Description Information' section has a 'Description' text area. At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons.

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.

The screenshot shows the 'Welcome Message' Campaign Detail page in the eLoop system. The top navigation bar includes 'Home', 'Campaigns', 'Contacts', 'Leads', and 'eLoop User Settings'. The left sidebar has a 'Search' section with a 'Search All' dropdown and a 'Go!' button, and a 'Recent Items' list. The main form is titled 'Welcome Message' and has a 'Campaign' header with 'Edit', 'Delete', 'Clone', 'Manage Members', 'Advanced Setup', and 'Send eLoop Campaign' buttons. The form is divided into two sections: 'Campaign Detail' and 'Custom Links'. The 'Campaign Detail' section includes fields for 'Campaign Owner' (Michael Weisel [Change]), 'Campaign Name' (Welcome Message [View Hierarchy]), 'Active' (checked), 'Type' (Conference), 'Status' (Planned), 'Start Date', 'End Date', 'Expected Revenue', 'Budgeted Cost', 'Actual Cost', 'Expected Response (%)' (0.00%), 'Num Sent' (0), and 'Parent Campaign'. The 'Custom Links' section has a 'Send eLoop Campaign' button. At the bottom of the form are 'Edit', 'Delete', 'Clone', 'Manage Members', 'Advanced Setup', and 'Send eLoop Campaign' buttons. The 'eLoop Campaign Results' section shows 'No records to display'.

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.

Campaign Members						
			Manage Members		Campaign Members Help	
Action	Type	Status	First Name	Last Name	Title	Company
Edit Remove	Lead	Responded	Michael	Weisel		Gold Lasso
Edit Remove	Lead	Responded	Mike	Weisel		Gold Lasso, Inc.

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.



Your Campaign SFWelcome Message was sent successfully on 11/09/2010 14:55:01 EST
Please [click here](#) to view campaign statistics

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.

eLoop Campaign Results

New eLoop Campaign Result

eLoop Campaign Results Help ?

Action

eLoop Campaign Results

Edit | Del

SFWelcome Message-11/09/2010 14:55:01 EST

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.

[Home](#)
[Campaigns](#)
[Contacts](#)
[Leads](#)
[eLoop User Settings](#)

Search

☐ Limit to items I own
 [Advanced Search...](#)

Leads

Home

Tell me more!

Help for this Page

View:

International Leads

Go!

[Edit](#) | [Create New View](#)

Recent Leads

New

Recently Viewed

Name	Company	Phone
Weisel, Michael	Gold Lasso	
Weisel, M	Gold Lasso, Inc.	
Singh, Dilpreet	Goldlasso	
Weisel, Mike	Gold Lasso, Inc.	

Recent Items

- Welcome Message
- Mike Weisel |
- Michael Weisel
- Dilpreet Singh
- M Weisel
- MWFinalTesting
- test test
- testing testing
- MW1104_Testing_2
- SFTTest110310

Recycle Bin

Quick Create

First Name

Last Name

Reports

[Lead Lifetime](#)
[Leads By Source](#)
[Bounced Leads](#)

[Go to Reports »](#)

Tools

[Import Leads](#)
[Mass Delete Leads](#)
[Transfer Leads](#)
[Mass Email Leads](#)
[Mass Add Leads to Campaign](#)

Summary

Interval:

From:

11/2/2010

[11/9/2010]

To:

[11/9/2010]

View:

My leads

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

[Home](#)
[Campaigns](#)
[Contacts](#)
[Leads](#)
[eLoop User Settings](#)

[Customize Page](#)
[Edit Layout](#)
[Printable View](#)
[Help for this Page](#)

Search

☐ Limit to items I own

[Advanced Search...](#)

Lead

Mr. Michael Weisel

[Back to List](#)

[Individual Results \(0\)](#)
[Open Activities \(0\)](#)
[Activity History \(0\)](#)
[Campaign History \(1\)](#)
[HTML Email Status \(0\)](#)

Lead Detail

Lead Owner	Michael Weisel [Change]	Phone	
Name	Mr. Michael Weisel	Mobile	
Company	Gold Lasso	Fax	
Title		Email	mweisel@goldlasso.com
Lead Source		Website	
Industry		Lead Status	Working - Contacted
Annual Revenue		Rating	
		No. of Employees	
Address			
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	Michael Weisel , 1/22/2010 8:36 AM	Last Modified By	Michael Weisel , 2/26/2010 2:23 PM
Description			

Recent Items

- [Michael Weisel](#)
- [Welcome Message](#)
- [Mike Weisel](#)
- [Dilpreet Singh](#)
- [M Weisel](#)
- [MWFinalTesting](#)
- [test test](#)
- [testing testing](#)
- [MW1104_Testing_2](#)
- [SFTTest110310](#)

Custom Links

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.

Your Single Lead Campaign has been processed

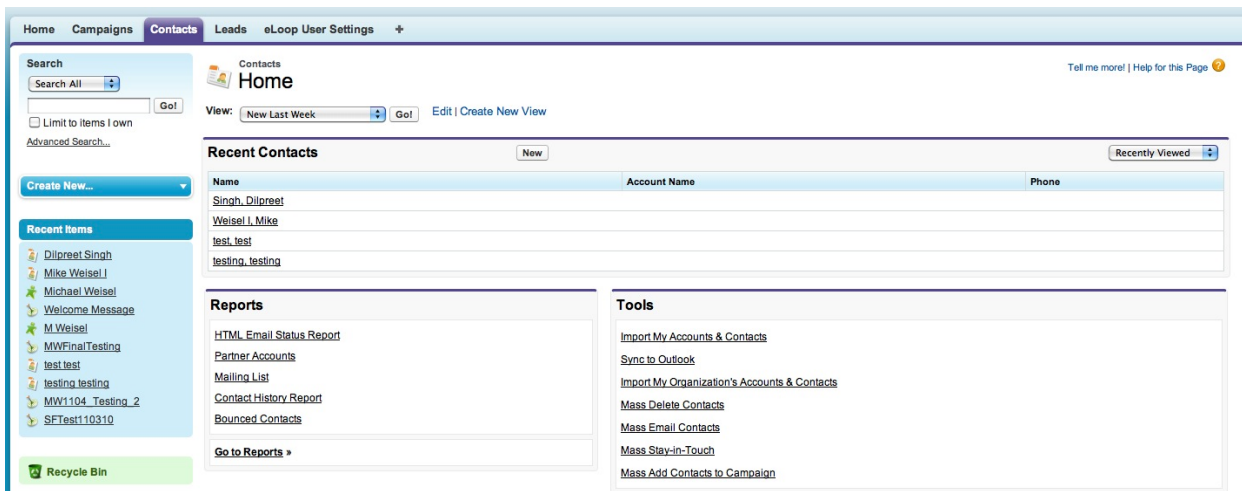
Your Single Lead Campaign [SFMichael](#) has been sent successfully. Please [Click here](#) to view campaign statistics

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.

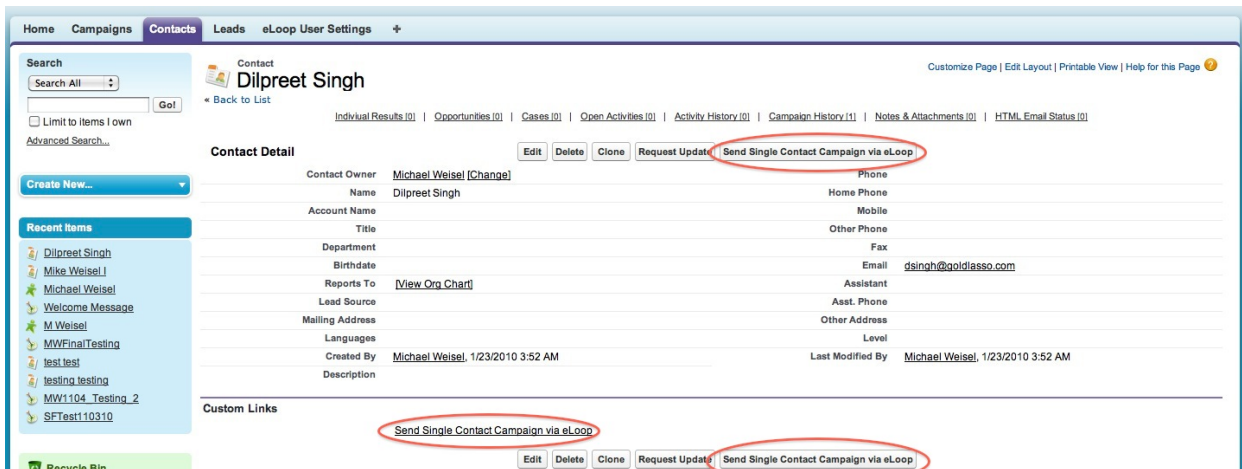
Individual Results		New eLoop Campaign Results for Individual	Individual Results Help ?
Action	eLoop Campaign Results for Individual		
Edit Del	SFMichael23/03/2010 21:45:24 EDT		
Edit Del	SFMichael23/03/2010 21:48:37 EDT		
Edit Del	SFMichael23/03/2010 21:51:04 EDT		
Edit Del	SFMichael07/05/2010 11:15:17 EDT		
Edit Del	SFMichael-04/11/2010 14:14:38 EDT		
Edit Del	SFMichael-09/11/2010 07:27:03 EST		
Edit Del	SFMichael-09/11/2010 15:21:56 EST		

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.

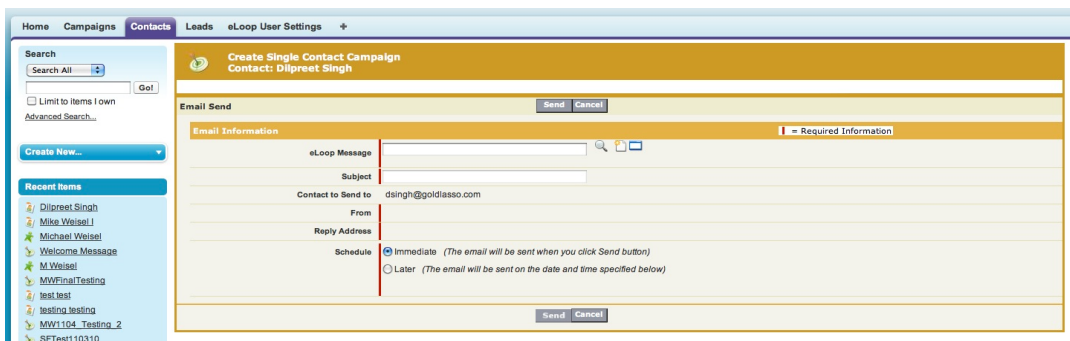


2. Click the “Send Single Contact Campaign via eLoop” button.



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.



Your Single Contact Campaign [SFDJlpreat09/11/2010 16:02:22 EST](#) has been sent successfully. Please [Click here](#) to view campaign statistics.

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.

Individual Results		New eLoop Campaign Results for Individual	Individual Results Help ?
Action	eLoop Campaign Results for Individual		
Edit Del	SFMichael23/03/2010 21:45:24 EDT		
Edit Del	SFMichael23/03/2010 21:48:37 EDT		
Edit Del	SFMichael23/03/2010 21:51:04 EDT		
Edit Del	SFMichael07/05/2010 11:15:17 EDT		
Edit Del	SFMichael-04/11/2010 14:14:38 EDT		
Edit Del	SFMichael-09/11/2010 07:27:03 EST		
Edit Del	SFMichael-09/11/2010 15:21:56 EST		

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.”