Salesforce Contact Uploading with Clout

Clout offers its Salesforce users two ways to seamlessly upload existing client and prospect data to be used in digital marketing efforts. In order to ensure that the contact lists and associated contact data are uploaded properly, please see below for basic formatting requirements:
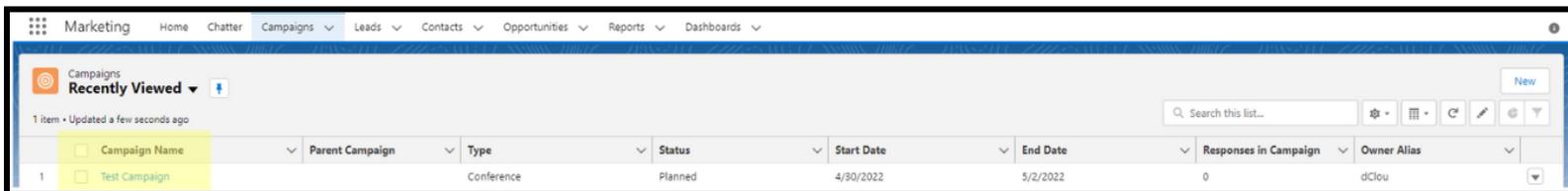
1. Contact Imports at the **Campaign** Level

1a. After logging into your Salesforce account, begin by navigating to the Marketing section of the platform.
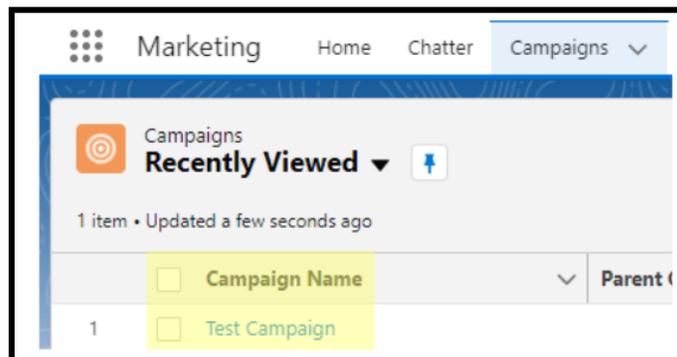
1b. Next, select "Campaigns" listed on the top bar of hosted options

1c. Once Campaigns is selected, please locate the data field labeled "Campaign Name" as shown in the following image:
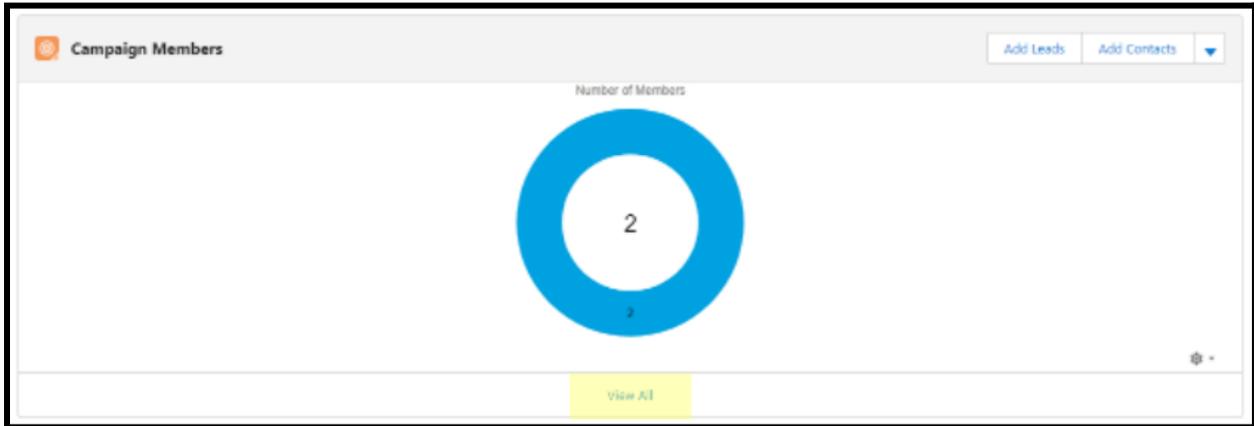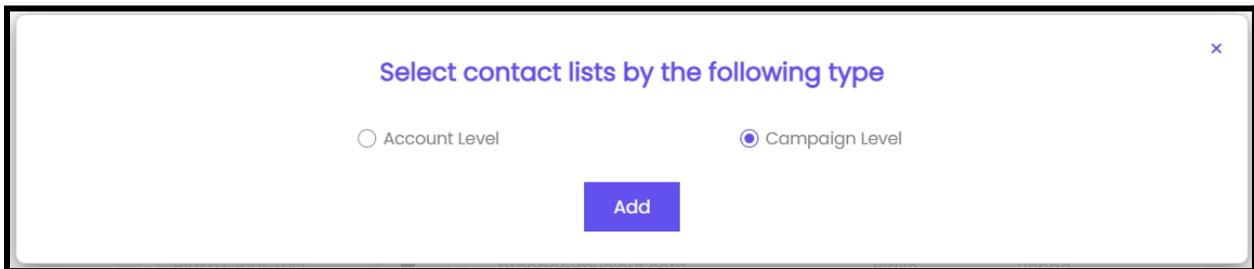

1d. When selecting to import client or prospect data into Clout, lists will be organized using the Campaign Name and will populate any contacts associated with the given campaign. If there are no campaign names listed in this field, or, if there are no contacts associated with the campaigns, the import will fail on Clout. Only Campaigns that are active will be available to import into Clout (where Campaign status in Salesforce is set to Active). If there are no Campaign Name's available, please reach out and we can work to help you create them for contact importing.

1e. In order to verify the contacts listed under a given campaign, simply select the hyperlinked campaign name and locate the Campaign Members section of the dashboard. By selecting "View All", you will be able to view all associated contacts listed under the specified campaign.

1f. If opting to utilize campaign level imports, after connecting Salesforce on Clout select "Campaign Level" > Add
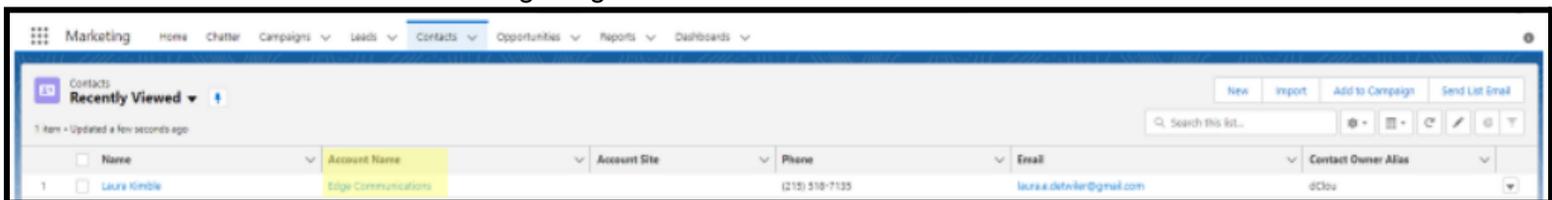

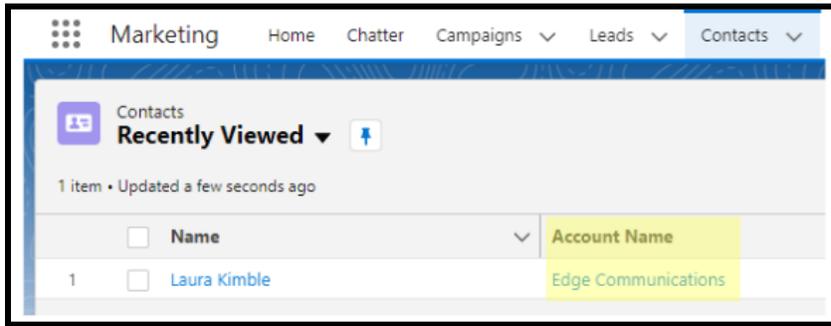## 2. Contact Imports at the **Account** Level

2a. After logging into your Salesforce account, begin by navigating to the Marketing section of the platform.

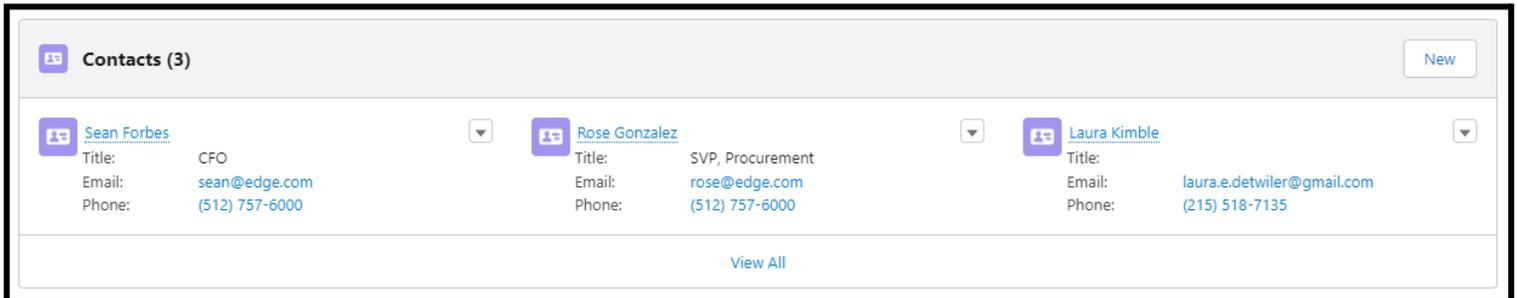2b. Next, select "Contacts" listed on the top bar of hosted options

2c. Once Contacts is selected, please locate the data field labeled "Account Name" as shown in the following image:

2d. When selecting to import client or prospect data into Clout, lists will be organized using the Account Name and will populate any contacts who are labeled as the same account. If there are no account names listed in this field, or, if there are no contacts associated with the account name, the import will fail on Clout. If there are no Account Names available, please reach out and we can work to help you create them for contact importing.

2e. In order to verify the contacts listed under a given account name, simply select the hyperlinked account (Edge Communications in the above) and locate the Contacts section of the dashboard. By selecting "View All", you will be able to view all associated contacts listed under the specified account.

2f. If opting to utilize campaign level imports, after connecting Salesforce on Clout select "Campaigns" > Add