

JangoMail for Salesforce®



Sending a JangoMail campaign from Salesforce

JangoMail for Salesforce® allows you to create, send, and track email campaigns to your Salesforce® Contacts, Leads, and Campaigns. You can do so by clicking custom JangoMail buttons within your Salesforce® Contacts, Leads, and Campaigns tabs.

First of all, if you are not using the Professional, Enterprise, or Unlimited editions of Salesforce, you cannot use the JangoMail integration. If you are testing Salesforce outside of use with JangoMail, you can use the Developer edition.

Second, if you do not have a JangoMail account, sign up for a free trial account at:

<https://www.jangomail.com/free-trial.aspx>

Third, once you do have a JangoMail account, and you are planning on including images in your message, upload those now.

Uploading Assets (images and attachments)

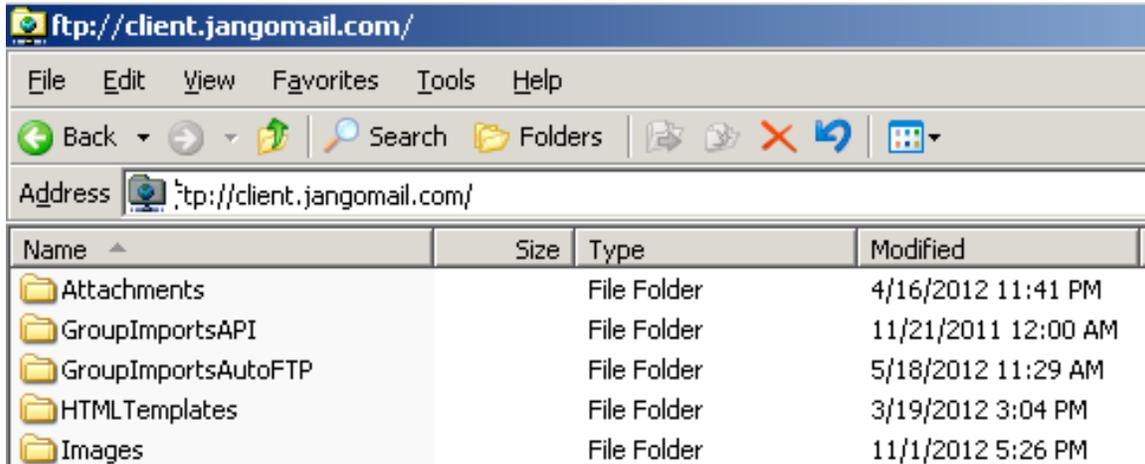
You can upload images into the Assets section of your account (one of the tabs on the top of the page) and have those hosted by JangoMail/JangoSMTP for free).

There are a couple of ways to upload assets ("assets" being images and attachments) into your account.

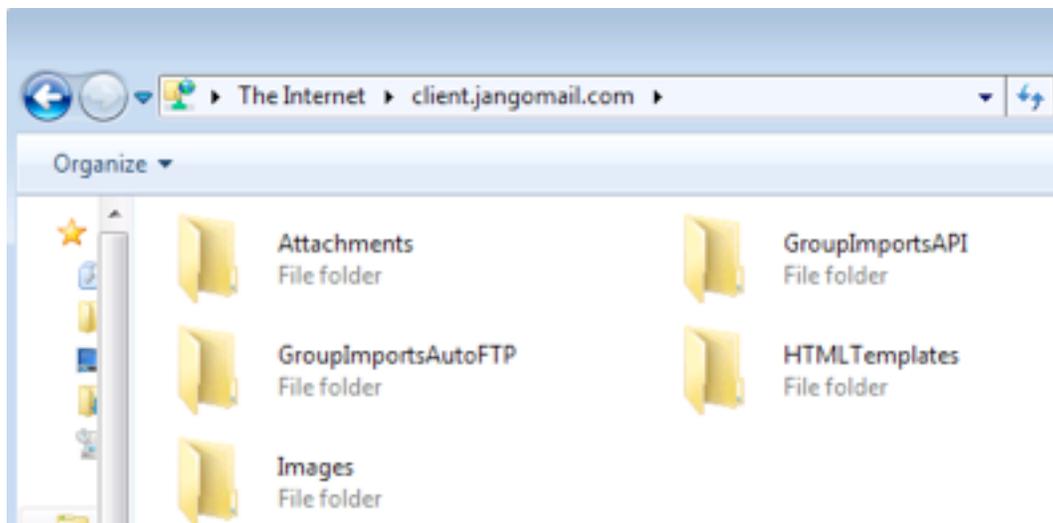
If you have just a few, it's easier to do it within your account in the user interface. After you logon, click on Assets, then Add new item, and from there, follow the steps to browse/find your file and upload it.

If you have a lot of images, instead of the one-at-a-time approach, you can use an FTP client (including Windows Explorer). For example, you could open My Computer, and then enter `ftp://client.jangomail.com`. For authentication, enter

your JangoMail/JangoSMTP username and password. Once connected, open the Images folder.



Another view of the FTP folders:



In another Explorer window, go to where your images are stored on your computer. Highlight/select the images you want to transfer and drag them over to the FTP window/session.

To reference an image within the body of your message, you would use the path to where your files are stored on our server. For example, if your user ID is 1234567, your path would be:

`http://img.jangomail.com/clients/1234567/Images/name_of_your_image.jpg`

When you edit an image, you can see the user ID part of your account. However, if you are inserting images within our HTML editor, the full path for the image will

be available in the drop-down list of values you see when using "Insert/Edit Image."

So, you don't have to remember this path - in the HTML editor while composing a message, you will have a list of values present while inserting an image, and the path will be filled in for you.

Fourth, prior to sending a JangoMail mass email campaign from within a Salesforce session, you need to have installed the Salesforce integration package we have at the private exchange (you can't search for our package at the AppExchange link in your Salesforce session).

To get the package, use the "Get It Now" link located here:

<https://www.jangomail.com/database-connectivity-salesforce.aspx>

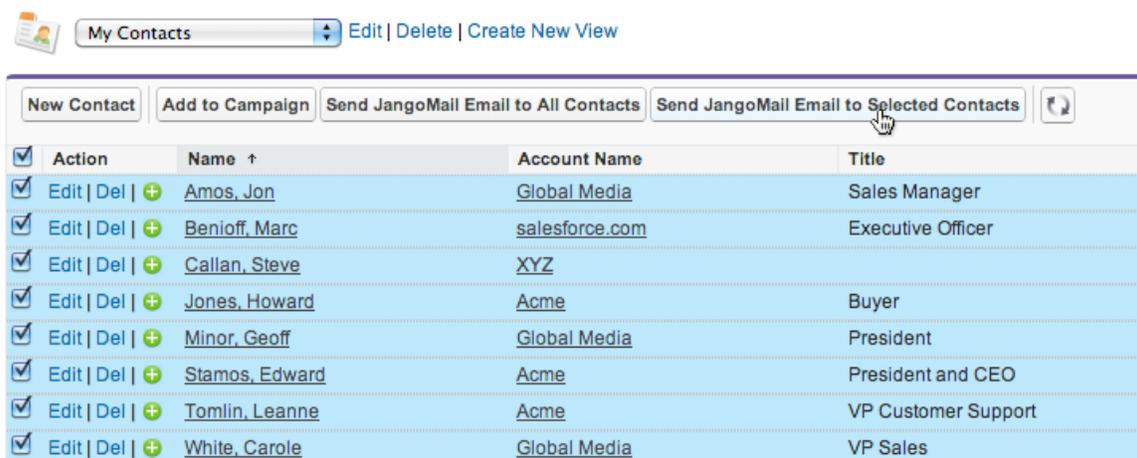
To install the package and go through the setup steps, use this guide:

<https://www.jangomail.com/documents/Public/JangoMailforSalesforceHelp.pdf>

Sending a JangoMail campaign from within Salesforce

Let's say you want to send a campaign to your Contacts. Go to the Contacts tab in Salesforce and drill down to where you can see your contacts (basically, a listing of contacts and you can see the JangoMail buttons).

Select some contacts, or use the shortcut button to select all contacts. In this example, I have selected 8 contacts (almost all are fake, you get some contacts in a Salesforce trial account).



The screenshot shows a Salesforce interface for a contact list. At the top, there is a search bar containing "My Contacts" and buttons for "Edit", "Delete", and "Create New View". Below this is a toolbar with buttons: "New Contact", "Add to Campaign", "Send JangoMail Email to All Contacts", and "Send JangoMail Email to Selected Contacts". A mouse cursor is hovering over the "Send JangoMail Email to Selected Contacts" button. The main area is a table with columns: "Action", "Name", "Account Name", and "Title". All rows in the table are selected, indicated by checkmarks in the "Action" column.

Action	Name	Account Name	Title
✓ Edit Del +	Amos, Jon	Global Media	Sales Manager
✓ Edit Del +	Benioff, Marc	salesforce.com	Executive Officer
✓ Edit Del +	Callan, Steve	XYZ	
✓ Edit Del +	Jones, Howard	Acme	Buyer
✓ Edit Del +	Minor, Geoff	Global Media	President
✓ Edit Del +	Stamos, Edward	Acme	President and CEO
✓ Edit Del +	Tomlin, Leanne	Acme	VP Customer Support
✓ Edit Del +	White, Carole	Global Media	VP Sales

On the next page that appears, you will have options to select additional fields from Salesforce. In the example below, FirstName was selected, LastName was too (not shown in the list of values), and Email is obviously a required selection.

8 records selected.

JangoMail for Salesforce

You have chosen to send an email campaign to the **Contacts/Leads** that you just selected.

Select the fields to use for personalization in your Subject/Message, and other areas of your em (hold CTRL to select mutiple fields)

Contact Fields

- AccountId
- AssistantName
- AssistantPhone
- Birthdate
- CreatedById
- CreatedDate
- Department
- Description
- Email
- Fax
- FirstName
- HomePhone
- Id
- IsDeleted
- LastActivityDate

>> Select these fields and continue to email creation >>

Assuming you have already connected your Salesforce account with your JangoMail account (see more information about this later), you will bypass the JangoMail login page and be taken directly to Messages, and a green status bar will reflect the database extraction just made (technically, we are querying the data from the Salesforce database).

At this point in JangoMail, you can start composing a new message from scratch (use the “Compose New Message” icon), or select an existing campaign to use as the basis of a new one (under the Operations columns, click the first icon in the row of your message of interest, “Copy this message to start a new campaign”).

The screenshot shows the JangoMail Messages interface. At the top, there is a navigation bar with the JangoMail logo and the word "Messages". Below the navigation bar, there is a blue header with the text "About Messages" and a menu with items: Dashboard, Messages, Lists, Reports, Assets, Surveys, Settings. A green status bar with a checkmark icon contains the text: "Data has been successfully extracted from your list (8 records). This Send E-mail page has been pre-configured to send to this group of e-mail addresses, but you may also add to the recipients of this message. [View a sample of the extracted web database data.](#)". Below the status bar, there is a "Messages" section with a search bar and a "Compose New Message" button. A table displays a list of messages with columns: Message ID, Subject, Sent, Type, Recipients, and Operations. The table contains two rows of data.

Message ID	Subject	Sent	Type	Recipients	Operations
277573569	JangoAdmin test	Oct-15-2012	Campaign	2	
277332452	unsub test	Oct-03-2012	Campaign	1	

In the picture below, you can see the results of the extraction and how they are now attached to your new message.

[About this Message](#)

Message

Data has been successfully extracted from your list (8 records). This Send E-mail page has been pre-configured with recipient addresses, but you may also add to the recipients of this message. [View a sample of the extracted web database](#)

Message & Content | Schedule | Tracking | Filtering | Additional Settings

To Lists | From | Copies | Reply To

Salesforce extraction (8 records)

To personalize your Subject/Message, you may use the following fields:
Email, FirstName, LastName

To insert these fields into your Subject/Message, use this syntax:

%%Email%% OR %%Email**Default Value%%
%%FirstName%% OR %%FirstName**Default Value%%
%%LastName%% OR %%LastName**Default Value%%

Note the personalization fields. This shows that in addition to Email, the FirstName and LastName fields were extracted from your Salesforce contacts.

At this point, sending your campaign is just like sending any other campaign as if you had logged in directly to JangoMail.

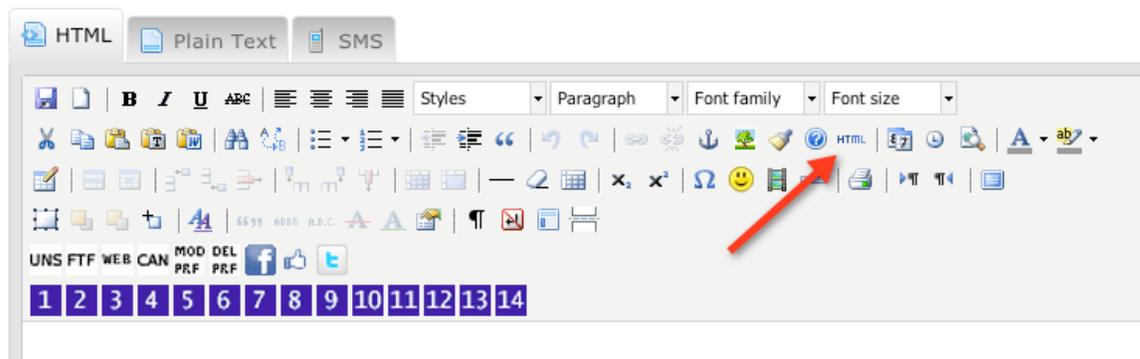
To use the TinyMCE editor

https://www.jangomail.com/documents/Public/JangoMail_Tutorial_Enhanced_HTML_Editor.pdf

You can use the EditLive! HTML editor, but it requires a Java Runtime Environment, and depending upon your computer's setup, even if you have a JRE, you may not have the correct one.

If you already have your own HTML code ready to go, you can paste into the editor. Click the HTML button in the menu and paste in your code in the popup window, click Update, and return to the editor to see your content. Do not paste your code into the regular message area – all we're going to do is show your message as the raw code (as if you were writing a tutorial on how use HTML, you would want the HTML example syntax displayed in your article, and that is

not what you want here; you want us to interpret your code and display how it looks when rendered).



To use personalization (%%FirstName%%)

To reference the first name in your message or subject, you enclose the field name with two per cent symbols. So, your subject can be:

Special offer for %%firstname%%

In the body of your message, you can use the field again (note you can use a comma or other text right after the closing %%):

Hello %%firstname%%,

Here is some information in our tutorials:

https://www.jangomail.com/documents/Public/JangoMail_Tutorial_Groups.pdf
https://www.jangomail.com/documents/Public/JangoMail_Tutorial_Personalization.pdf

To extend the example a bit, using an address and a dealership, you could have a list with the address, first name, dealer name & phone, and dealer location. Your message body could be:

Hello %%firstname%%,

It is time to service your car. Contact your dealer, %%dealersname%%, at %%dealerphone%%, or take your car to %%dealerlocation%%.
We look forward to seeing you, %%firstname%%.

The list would have fieldnames of emailaddress (which it does by default), firstname, dealersname, dealerphone, and dealerlocation.

You can also substitute in a default value for firstname if the value is blank (like what the tutorial shows, "Valued Customer" or whatever you'd like).

Our user guides/tutorials

<https://www.jangomail.com/tutorials.aspx>

Integrating your JangoMail account with Salesforce

<http://blog.jangomail.com/2012/07/salesforce-synchronization-is-here.html>

What Salesforce looks like in JangoMail

In your account's Settings area, you can see information about your account's tie-in with Salesforce. The main area of interest is in the box showing Salesforce user IDs. ***This is not your email address you use to logon to Salesforce, despite your best efforts to do so by entering an email address here.***

How do you find your Salesforce user ID? Actually, there is no need to. The first time you logon to JangoMail from within a Salesforce session, your user ID will be entered into JangoMail by us.

Settings / Link Salesforce.com Accounts

[About Salesforce.com Accounts](#)

Username: ?

Password: ?

Security Token: ?

Synchronize: ?

0 of 7 email unsubscribes have been synchronized.

Salesforce.com User IDs: ?

```
005d00000013pu1
005E0000002Bclz
005G0000002WsOQ
005G000000262II
005d0000001kiII
```

If you have a reason to manually enter a user ID, go to your profile in Salesforce and hover over some of the links/tabs until you see a URL containing a string similar to what is shown above.

As an experiment, once you've logged into JangoMail from with Salesforce and have a user ID entered in your JangoMail account, exit Salesforce. Then within JangoMail, delete your ID. Start a new Salesforce session and start the connection process to JangoMail (go there directly via a tab, or start a campaign). You will be prompted to login at JangoMail, and this will re-enter your Salesforce user ID back in your JangoMail account.



Welcome to JangoMail for Salesforce!

To use JangoMail for Salesforce, you need to link a JangoMail account to your Salesforce account. You can do this by **logging into your existing JangoMail account** or **creating a new one**.

Login to your existing JangoMail account and link it to this Salesforce account:

JangoMail Username:

JangoMail Password:

[>> Login to JangoMail >>](#)

Or

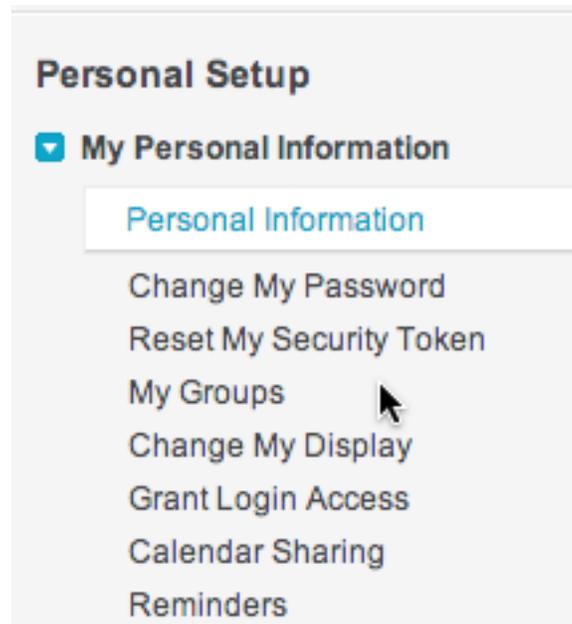
Create a new JangoMail Trial Account for free:

Choose a JangoMail Username:

[>> Create JangoMail Account Now >>](#)

Connecting to Salesforce while using JangoMail

If you are interested in synchronization between JangoMail and Salesforce, or if you want to connect back to Salesforce from JangoMail (as opposed to starting off in Salesforce and connecting to JangoMail), you will need your Salesforce security token. To get a token, go to your account area and request a new token (use the reset option). Salesforce will send you an email with the new token, and you can take that value and enter it into your JangoMail account.



In the email you receive from Salesforce:

Your Security Token Is Enclosed.

Dear Your Name,

When accessing salesforce.com from outside of your company's trusted network, you may be prompted to enter your password to log in to a desktop client, such as Connect for Outlook, Connect for Lotus Notes, or the Data Loader.

New security tokens are automatically sent to you when your salesforce.com request to reset your security token.

Your new security token is below. Note that security tokens are case sensitive.

User Name: <your email address used with Salesforce>

Security Token: Vi7Ypup8rFjo4MFmcSaoL604a



In JangoMail Settings > Integrating JangoMail with Other Systems > Link Salesforce.com Accounts, enter your Salesforce email address/username, your Salesforce password, and the token value. Click Save.

Settings / Link Salesforce.com Accounts ✕

[About Salesforce.com Accounts](#)

Username: ⓘ

Password: ⓘ

Security Token: ⓘ

Synchronize: ⓘ

0 of 7 email unsubscribes have been synchronized.

Salesforce.com User IDs: ⓘ

Create a Salesforce database connection

In this section, you'll create a stored connection profile back to your Salesforce account. Go to Lists > Databases and click/select the "Create New Database" option. By virtue of having your Salesforce credentials stored with us, you'll now see the Salesforce CRM/Application Database option enabled. Click the Application Database option/icon.

What type of database are you using?



Internet Web Database



Local Database

Only available when using Internet Explorer



Application Database

In the "Connect to Salesforce.com" window that next appears, enter/select what it is you want to do in terms of selecting data related to your contacts, leads and campaigns. In the example below, a simple query to pull Email from Contact was used.

Connect to Salesforce.com

Provide the your Salesforce.com data profile with a name, login information and the source and fields to include. Uses the condition selections to limit which records will be returned.

Optionally, advanced uses can provide a custom SQL query to select based on more specific criteria.

Profile Name:

Pull From:

Field Names:

(hold shift to select multiple fields)

Condition(s):
 Equals
 Equals
 Equals
 Equals
 Equals

SQL Query:

[Generate SQL Query from Selections](#)

You can click the “Generate SQL Query from Selections” link at the bottom to create the SELECT statement shown above. Save your work.

Back in the list of database connections, you should see your new profile. Click on the database icons under Operations to make a connection to your Salesforce account.

Connection Name	Type	Created	Operations
Test connection to Salesforce	Salesforce: Contacts	7/2/2013	
IE10_to_Excel_XSLX	Local DB: Excel File	6/7/2013	

JangoMail will then make a connection to your Salesforce account, execute the query within the profile, and take you to the Messages section of your JangoMail account. JangoMail will display a message showing you how many records were extracted.

Messages

About Messages

Data has been successfully extracted from your list (23 records). This Send E-mail page has been pre-configured to send to this group of contacts.
You can also [save the extracted data as a new list](#).

At this point, you can start a message or select an existing one as the start of a new campaign. You can also click the link to save the extraction as a new list within your JangoMail account.