

Synchronize with Salesforce

What is it?

Salesforce is an industry leading SaaS business tool used by many companies. It's a great tool to use in combination with JangoMail--to provide the list data for broadcast email campaigns.

JangoMail can connect directly to a Salesforce account and pull Contacts and Leads for use in a campaign.

With Salesforce integration, users can now have valuable data such as unsubscribes automatically synchronized back to Salesforce from JangoMail.

In order to set up synchronization, you need:

1. [A Salesforce Account \(Free Trial!\)](#)
 - a. Salesforce Username, Password
 - b. Salesforce Security Token (for use with apps)
2. [A JangoMail Account \(Free Trial!\)](#)

Step 1: Enable Permissions on Salesforce.com

First you need to enable the "**HasOptedOutOfEmail**" field to be visible by your Salesforce account.

1. Login to [Salesforce.com](#) and identify your profile type. Click on your name at the top navigation bar of the screen and then "**My Profile**". Then click on the "**User Detail**" link at the top right of the page.

The screenshot shows the Salesforce user profile page for 'Matt Mock'. The 'User Detail' section contains a table with the following information:

User Detail		Role	
Name	Matt Mock	User License	Salesforce
Alias	MMock	Profile	System Administrator
Email	matt@us.jangomail.com	Active	<input checked="" type="checkbox"/>
Username	matt1@us.jangomail.com	Marketing User	<input checked="" type="checkbox"/>
Community Nickname	matt1.335470454769434E12	Offline User	<input checked="" type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	Us	Force.com Flow User	<input type="checkbox"/>
Department			

The "**Profile**" field indicates your profile type. In our example, the profile type is "**System Administrator**". Make note of your profile type for the next steps, to make the "**HasOptedOutOfEmail**" visible for this Profile type.

2. On the left-hand Salesforce vertical navigation menu, go to **Customize->Contacts->Fields**. Then click on the link for the field "**HasOptedOutOfEmail**" ("**Email Opt Out**").

Action	Field Label	Field Name	Data Type	Controlling Field
Edit	Account Name	Account	Lookup(Account)	
Edit	Assistant	AssistantName	Text(40)	
Edit	Asst. Phone	AssistantPhone	Phone	
Edit	Birthdate	Birthdate	Date	
Edit	Contact Owner	Owner	Lookup(User)	
	Created By	CreatedBy	Lookup(User)	
Edit	Data.com Key	Jigsaw	Text(20)	
Edit	Department	Department	Text(80)	
Edit	Description	Description	Long Text Area(32000)	
Edit	Do Not Call	DoNotCall	Checkbox	
Edit	Email	Email	Email	
Edit	Email Opt Out	HasOptedOutOfEmail	Checkbox	
Edit	Fax	Fax	Fax	
Edit	Fax Opt Out	HasOptedOutOfFax	Checkbox	
Edit	Home Phone	HomePhone	Phone	
	Last Modified By	LastModifiedBy	Lookup(User)	
Edit	Last Stay-in-Touch Request Date	LastCURquestDate	Date/Time	
Edit	Last Stay-in-Touch Save Date	LastCUUpdateDate	Date/Time	

3. Then on the "Email Opt Out" field page, click the "Set Field-Level Security" button at the top.

Contact Field [Help for this Page](#)

Email Opt Out

[Back to Contact Fields](#)

[Edit](#)
[Set Field-Level Security](#)
[View Field Accessibility](#)

Field Information

Field Label	Email Opt Out	Field Name	HasOptedOutOfEmail
Data Type	Checkbox		
Help Text			

Field Dependencies [New](#) [Field Dependencies Help](#)

No dependencies defined.

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

4. This brings you to the "Set Field-Level Security" page. On this page, you need to make sure that for whatever profile type you have (ie. Account Administrator, if that's your profile type), the "Visible" field must be checked. Also ensure that the "Read Only" field is NOT checked. In this example, we made the field visible for ALL profile types. You may do this if you wish.

Set Field-Level Security
Email Opt Out

[Help for this Page](#) ?

Field Label	Email Opt Out
Data Type	Checkbox

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Custom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Standard	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JangoMail Portal Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click **Save** to save your changes to this field.

- Go back one page to the "Email Opt Out" Page. This time click the "View Field Accessibility" button.

Contact Field
Email Opt Out
[Back to Contact Fields](#)

Field Information

Field Label	Email Opt Out	Field Name	HasOptedOutOfEmail
Data Type	Checkbox		
Help Text			

Field Dependencies [Field Dependencies Help](#) ?

No dependencies defined.

Validation Rules [Validation Rules Help](#) ?

No validation rules defined.



This brings you to the "Field Accessibility" page. Once here, click the "Hidden" link next to your profile type in the list (in our example, "System Administrator").

Field Accessibility

Contact

This page allows you to view Contact field accessibility for a particular field.

Field accessibility for Field:

Click on a cell in the table below to change the field's accessibility.

Profiles	Field Access
Contract Manager	Hidden
Custom: Marketing Profile	Hidden
Custom: Sales Profile	Hidden
Custom: Support Profile	Hidden
Customer Portal Manager Custom	Hidden
Customer Portal Manager Standard	Hidden
Gold Partner User	Hidden
High Volume Customer Portal	Hidden
Marketing User	Hidden
Read Only	Hidden
Silver Partner User	Hidden
Solution Manager	Hidden
Standard Platform User	Hidden
Standard User	Hidden
System Administrator	Hidden



Note: If the link says "Editable" instead of "Hidden", the field may already be editable. Click the link anyway to verify the proper settings.

6. This brings you to the "Access Settings" page for the field. On this page, make sure the "Visible" checkbox is checked for each of the two items. Also ensure that the "Read-Only" checkboxes are NOT checked.

Email Opt Out

The **Email Opt Out** field is currently **Hidden** for the **System Administrator** profile.

Field-Level Security:

Profile	Field	Visible	Read-Only
System Administrator	Email Opt Out	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Page Layout:

Add the **Email Opt Out** field to the **Contact Layout** page layout.
 Choose a different page layout for the **System Administrator** profile.

Use the checkboxes below to change the page layout settings for the **Email Opt Out** field on the **Contact Layout** page layout.
The field will be added as the last field in the page layout section

Page Layout	Section	Field	Visible	Read-Only	Required
Contact Layout	Contact Information	Email Opt Out	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Changes to the **Contact Layout** page layout will apply to all profiles that are assigned to this page layout. The table below shows which profiles are currently assigned to the page layout.

Profiles	Contact Layout
Contract Manager	<input checked="" type="checkbox"/>
Customer Portal Manager Custom	<input checked="" type="checkbox"/>
Customer Portal Manager Standard	<input checked="" type="checkbox"/>
Gold Partner User	<input checked="" type="checkbox"/>
High Volume Customer Portal	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>
Silver Partner User	<input checked="" type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>



Save changes by clicking the button. You can now see that the field has been made editable by the new link indicator "**Editable**".

Field Accessibility

Contact

This page allows you to view Contact field accessibility for a particular field.

Field accessibility for Field:

Click on a cell in the table below to change the field's accessibility.

Profiles	Field Access
Contract Manager	Hidden
Custom: Marketing Profile	Hidden
Custom: Sales Profile	Hidden
Custom: Support Profile	Hidden
Customer Portal Manager Custom	Hidden
Customer Portal Manager Standard	Hidden
Gold Partner User	Hidden
High Volume Customer Portal	Hidden
Marketing User	Hidden
Read Only	Hidden
Silver Partner User	Hidden
Solution Manager	Hidden
Standard Platform User	Hidden
Standard User	Hidden
System Administrator	Editable



Note: You may also change the field access levels for other profiles types as well if you wish.

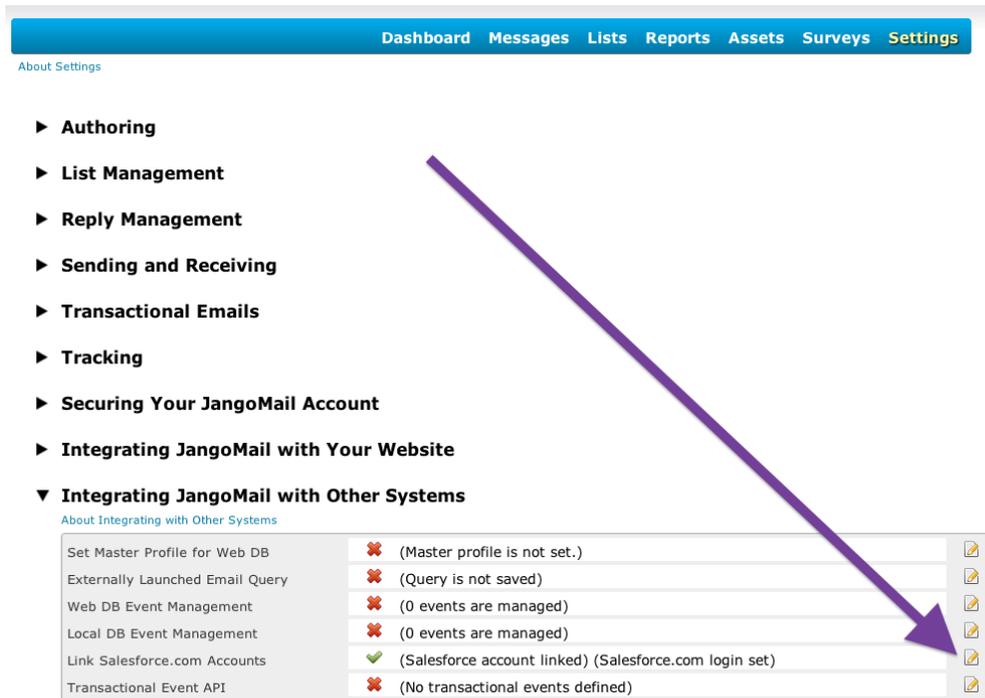
7. Follow these same steps again (**steps 2 through 6**), but this time with **Leads** instead of **Contacts**. Go to **Customize->Leads->Fields** on the left side navigation. Click on the "**Email Opt Out**" link, then "**Set Field-Level Security**" and enable "**Visible**" for your profile type, or just all of the profile types, if you wish. Ensure that "**Read Only**" is not checked and **Save** your changes.

After this, your Salesforce should be set-up for syncing.

Step 2: Enable Synchronization on JangoMail.com

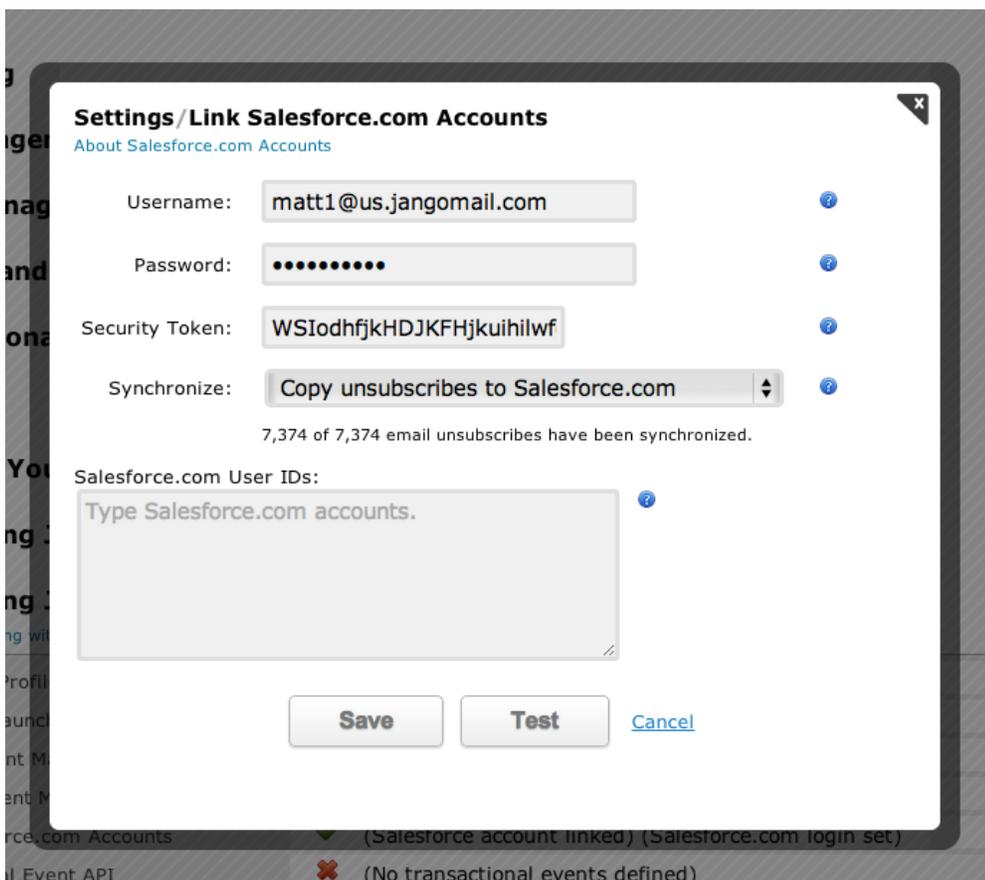
Once you've enabled the proper permissions on Salesforce, you can now enable Salesforce synchronization on JangoMail.com. Before you can do this, ensure that you've either previously established a connection with Salesforce already on JangoMail.com or that you have the necessary Salesforce credentials ready to make the connection. The credentials you'll need are your Salesforce Username, Password, and Security Token.

1. **Login to JangoMail.com** and click on **Settings** on the top navigation bar. Among the settings options in the list, click on "**Integrating JangoMail with Other Systems**" which expands, revealing some options. Click the **edit icon** for the "**Link Salesforce.com Accounts**" item.



This brings up a dialog to manage your Salesforce credentials and settings.

2. If you've connected to Salesforce before with your JangoMail account, you'll just need to enable Synchronization on this dialog and save changes. If you have not connected to Salesforce before, enter your Salesforce credentials and enable synchronization.



To enable synchronization, click the dropdown menu next to the option and select "**Copy unsubscribes to Salesforce.com**". In the future we'll likely add a variety of other options for synchronization, including synchronization of bounces as well and 2 way

synchronization.

3. You may click the **test** button to test your connection and verify that your credentials are working. If your credentials are correct and you've enabled the correct permissions on Salesforce, you should see a **connection success dialog** appear, confirming success and you can **save** your changes. If you get errors, check to make sure that your credentials are valid and permissions have been enabled on Salesforce.com. If you just enabled permissions, wait a few hours for changes to permeate on Salesforce.com. We discovered it can take **some time** for your Salesforce changes to take effect.

When you've successfully saved your Salesforce credentials, you're done! Now your Contacts and Leads on Salesforce will automatically be updated with unsubscribed list members on a daily basis.

If you haven't connected to your Salesforce Database yet, head over to **Lists->Databases** on JangoMail and create a new Salesforce Connection to pull your contacts and/or leads for use in an email campaign. Read [this tutorial](#) for more information about connecting to Salesforce to retrieve list members.

Frequently Asked Questions

1. What happens if there is an error updating my account?

If you've enabled automatic synchronization with Salesforce, you will not be notified when things are continually updated successfully. On the other hand, if something changes with Salesforce and you must update a username, password, security token, or permissions, you will only be notified via email so you can perform the needed corrections.

2. Will JangoMail remove or modify any of my Salesforce data?

No, the only thing JangoMail will do is mark a Contact or Lead as "Opted Out of Email" if they unsubscribe from one of your email campaigns. You may always change this field yourself on Salesforce if you wish to undo the changes.

3. Can JangoMail import unsubscribes from Salesforce?

Currently no, but this type of two-way automatic synchronization may be implemented soon if it is desired by our Salesforce customers. However, when establishing your Database connection on JangoMail, you may use a custom query to select only customers that have not opted out of emails when retrieving the list of members for your email campaign. This essentially has the same effect for you but requires an extra step to setup.

4. How do I generate a Salesforce security token?

On **Salesforce**, go to **Your Name->My Profile** and click on **User Details** at the top of the subsequent page. Then click on "**Reset My Security Token**" in the left menu, under the "**My Personal Information**" item. Follow instructions and you will be emailed a security token by Salesforce.