



JangoMail for Salesforce Setup Guide

This guide assumes that you've already installed **JangoMail for Salesforce** into your Salesforce account using the **"Get It Now"** function on the AppExchange. You should see two new tabs in your Salesforce account, **JangoMail** and **JangoMail Help**. Click the **JangoMail tab** to link your JangoMail account to your Salesforce account.

Then proceed with the following directions...

Your setup is almost complete - there are a few manual setup steps required in order to take full advantage of JangoMail's integration with Salesforce. The guide below will walk you through adding some buttons and sections to the layouts of your **Contacts tab, Leads tab, and Campaigns tab**. Once you've added the buttons and custom sections, you will be able to:

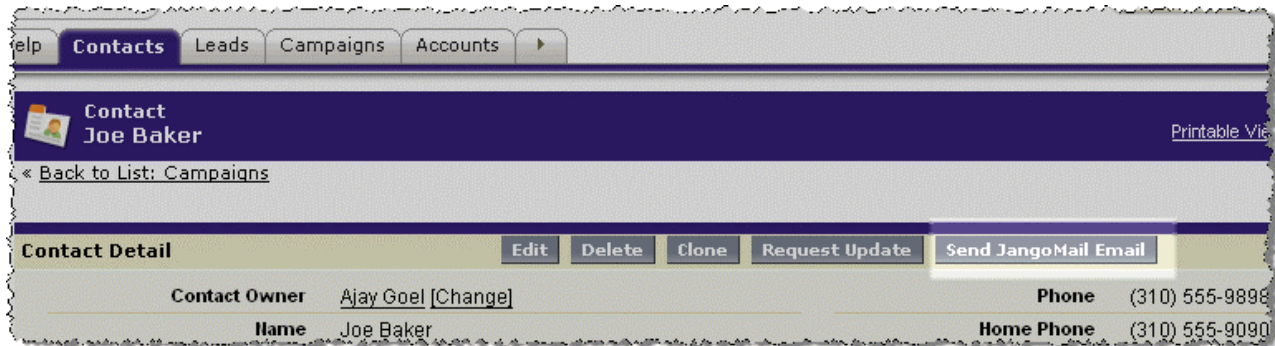
1. Send an email campaign through JangoMail inside your **Contacts tab**. You can send to a single Contact, a group of selected Contacts, or all of your Contacts.
2. Send an email campaign through JangoMail from inside your **Leads tab**. You can send to a single Lead, a group of selected Leads, or all of your Leads.
3. Send an email campaign to a combination of **Contacts** and **Leads** if you've defined a Salesforce Campaign. You can do this from inside your **Campaigns tab**.
4. View **JangoMail Email History** for a particular **Contact** or **Lead**.

The buttons are already in your account under the **"Setup"** section at the top of your screen. The buttons only need to be added to the layouts under the **Contacts, Leads, and Campaigns tab**.

Note: This setup will take approximately 4-5 minutes, depending on how fast you point, click, and type.

Customize the Contacts tab:

1. Click the **Setup** link at the top.
2. Navigate to **Customize --> Contacts --> Page Layouts**.
3. **Edit the Contact Layout**. Find the **Button Section** and double-click where it says **Detail Page Buttons**. Choose to **Add** the **Send JangoMail Email** button, and then click **OK**. You will now be able to send an on-the-fly JangoMail email campaign to a single Contact.

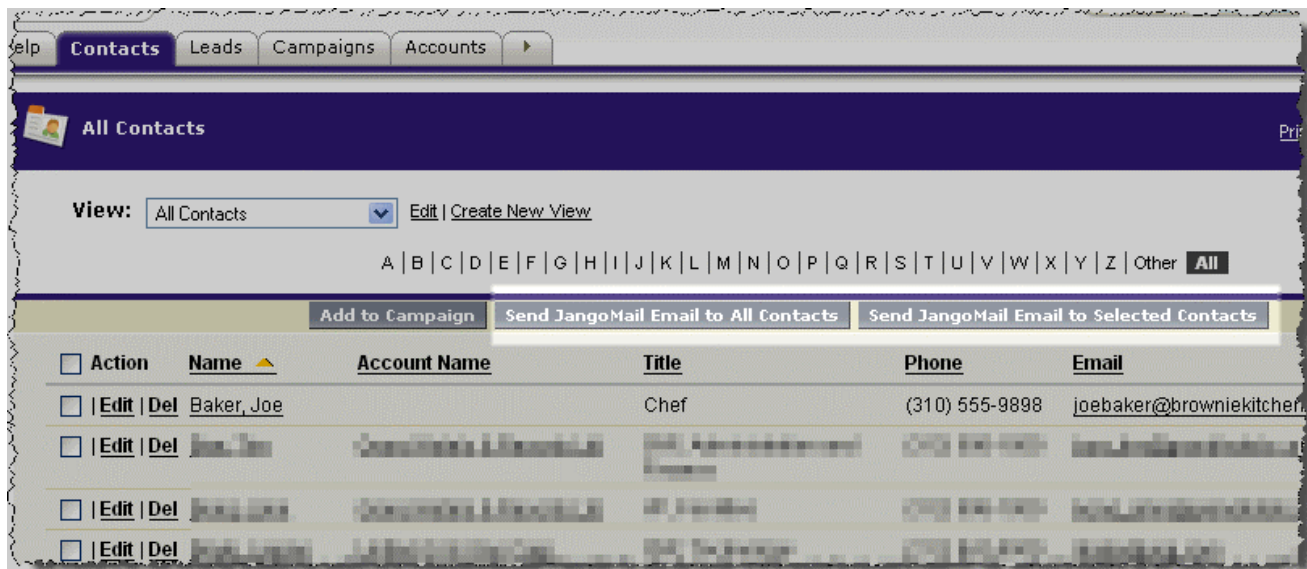


4. Stay in **Customize --> Contacts --> Page Layouts**. Next, find the **View dropdown menu** towards the right side of your window. Change the **View** to **Custom S-Controls**. You should now see **JangoMail Campaign History** as a **Custom S-Control**. Click the **Create New Section** button at the top of your screen and name it "JangoMail Contact History" and set it to **1 (Single)** column. Click **OK**. Next, drag the **JangoMail Campaign History S-Control** into the **JangoMail Contact History** section that you just created. Then click **Save** on the **Page Layout Properties** page. *You will now be able to see a particular Contact's history with JangoMail campaigns, including what email campaigns the Contact received, and any actions, such as Opens/Clicks/Unsubscribes that the Contact took.*

4. Next go to **Customize --> Contacts --> Search Layouts**.

5. Click **Edit** next to **Search Results** and under the **Custom Buttons** section, add the two buttons **Send JangoMail Email to All Contacts** and **Send JangoMail Email to Selected Contacts**. Then click the **Save** button underneath. *You will now be able to send an on-the-fly JangoMail email campaign to a All or Selected Contacts when you search your Contacts.*

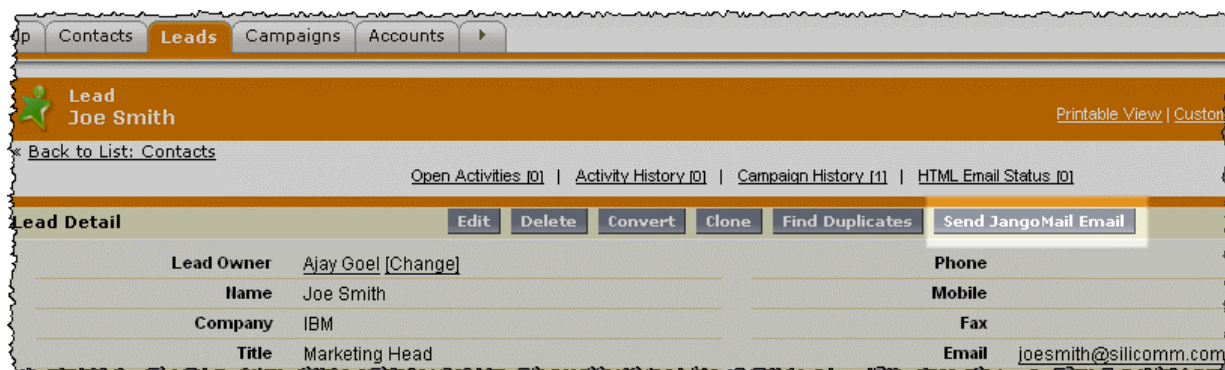
5. Stay in **Customize --> Contacts --> Search Layouts**. Now click **Edit** next to **Contacts List View**. Again, add the two buttons **Send JangoMail Email to All Contacts** and **Send JangoMail Email to Selected Contacts**. Then click the **Save** button underneath. *You will now be able to send an on-the-fly JangoMail email campaign to a All or Selected Contacts when you filter your Contacts by a View.*



Customize the Leads tab:

These instructions are almost identical to the Contacts tab instructions. The only difference is now you're customizing the Leads tab.

1. Click the **Setup** link at the top.
2. Navigate to **Customize --> Leads --> Page Layouts**.
3. **Edit** the **Lead Layout**. Find the **Button Section** and double-click where it says **Detail Page Buttons**. Choose to **Add** the **Send JangoMail Email** button, and then click **OK**. You will now be able to send an on-the-fly JangoMail email campaign to a single Lead.



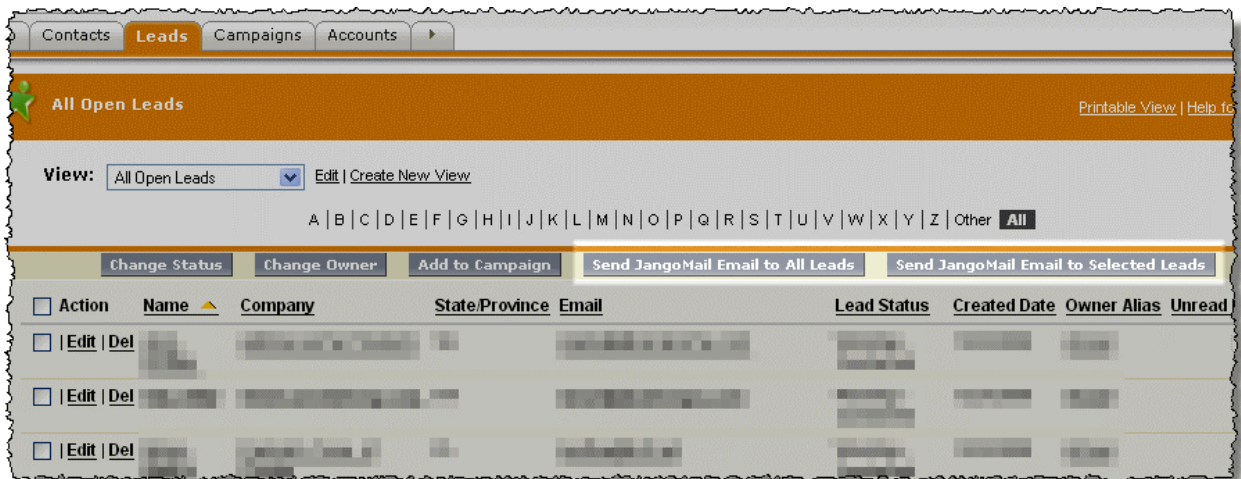
4. Stay in **Customize --> Leads --> Page Layouts**. Next, find the **View dropdown menu** towards the right side of your window. Change the **View** to **Custom S-Controls**. You should now see **JangoMail Campaign History** as a **Custom S-Control**. Click the **Create New Section** button at the top of your screen and name it "JangoMail Lead History" and set it to **1 (Single)** column. Click **OK**. Next, drag the **JangoMail Campaign History** S-Control into the **JangoMail Lead History** section that you just created. Then click **Save** on the **Page Layout Properties** page. You will now be

able to see a particular Lead's history with JangoMail campaigns, including what email campaigns the Lead received, and any actions, such as Opens/Clicks/Unsubscribes that the Lead took.

4. Next go to **Customize --> Leads --> Search Layouts**.

5. Click **Edit** next to **Search Results** and under the **Custom Buttons** section, add the two buttons **Send JangoMail Email to All Leads** and **Send JangoMail Email to Selected Leads**. Then click the **Save** button underneath. You will now be able to send an on-the-fly JangoMail email campaign to a All or Selected Leads when you search your Leads.

5. Stay in **Customize --> Contacts --> Search Layouts**. Now click **Edit** next to **Leads List View**. Again, add the two buttons **Send JangoMail Email to All Leads** and **Send JangoMail Email to Selected Leads**. Then click the **Save** button underneath. You will now be able to send an on-the-fly JangoMail email campaign to a All or Selected Leads when you filter your Leads by a View.



Customize the Campaigns tab:

1. Click the **Setup** link at the top.

2. Navigate to **Customize --> Campaigns --> Page Layouts**.

3. **Edit** the **Campaign Layout**. Find the **Button Section** and double-click where it says **Detail Page Buttons**. Choose to **Add** the **Send JangoMail Email to Campaign Members** button, and then click **OK**. Now click **Save** on the **Page Layout Properties** page. You will now be able to send an on-the-fly JangoMail email campaign to a Salesforce Campaign. A Salesforce Campaign is just a subset of Contacts and Leads.

Contacts Leads **Campaigns** Accounts

Campaign
First Campaign Printable View | Customize Page | Help for this Page

[Back to List: Leads](#) [Campaign Hierarchy \(1\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Attachments \(0\)](#) | [Opportunities \(0\)](#)

Campaign Detail [Edit](#) [Delete](#) [Clone](#) [Manage Members](#) [Advanced Setup](#) [Send JangoMail Email to Campaign Members](#)

Campaign Owner	Ajay Goel [Change]	Active	<input type="checkbox"/>
Campaign Name	First Campaign	Total Leads	0
Type	Conference	Converted Leads	0
Status	Planned	Total Contacts	3

Need help?

If you have any difficulty, [JangoMail Support](#) may need you to provide the following information.