



## JangoMail for Salesforce® Setup Guide

This guide is for the Enhanced Page Layout Editor. If your Setup options are different, our guide for the older Editor is [here](#). If you have any difficulties please contact [JangoMail Support](#).

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**.

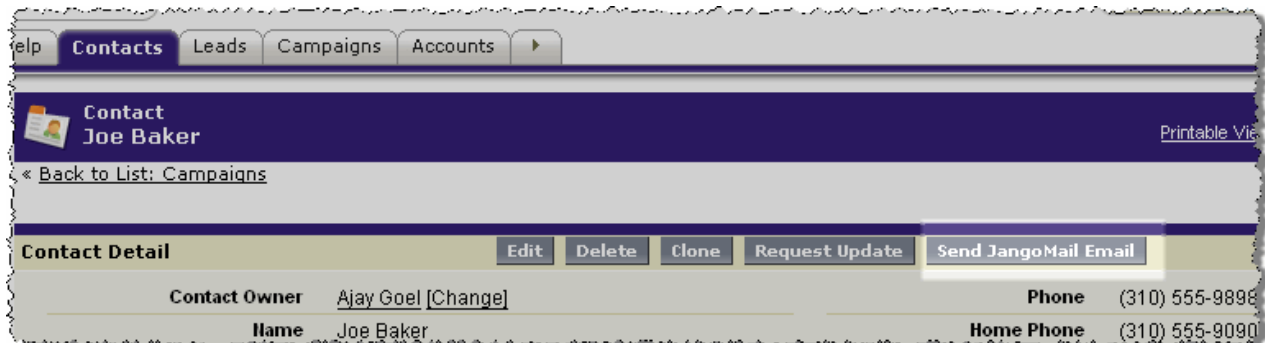
The buttons are already in your account under the "**Setup**" section at the top of your screen. The buttons only need to be added to the layouts under the **Contacts, Leads, and Campaigns tab**.

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

### **Customize the Contacts tab:**

1. Click the **Setup** link at the top of the page by clicking the drop down arrow next to your login name.
2. On the left hand side, navigate to **App Setup --> Customize --> Contacts --> Page Layout**.
3. To **Edit** the **Contact Layout**, click on **Buttons** in the top panel. Drag the **Send JangoMail Email** button down into the **Contact Detail** area for buttons. When you release

the button, it will appear in a section labeled, **Custom Buttons**. To save, click **Save** at the top of your page. You will now be able to send an on-the-fly JangoMail email campaign to a single Contact.

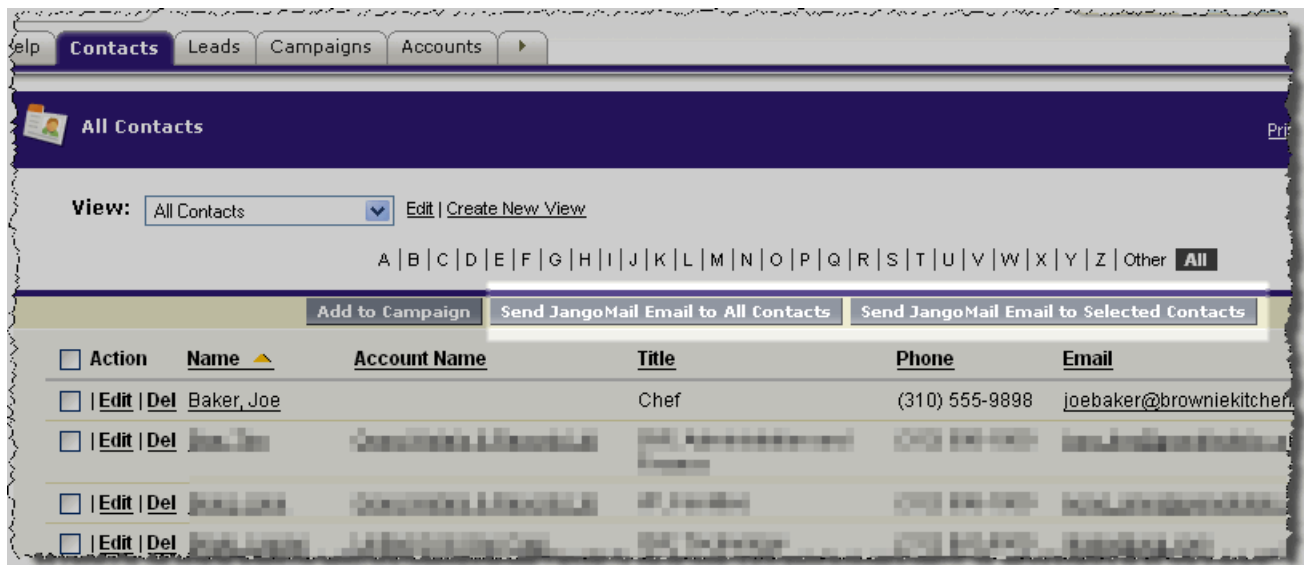


4. Stay in **Customize --> Contacts --> Page Layout**. Again, **Edit** the **Page Layout**: click on the section for **Custom S-Controls** at the top of the page. First, drag a new **Section** down into the page layout, positioned where you wish. Set the Section Name to **JangoMail Campaign History**, with **1-column layout** for its setting. 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.

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

6. 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.

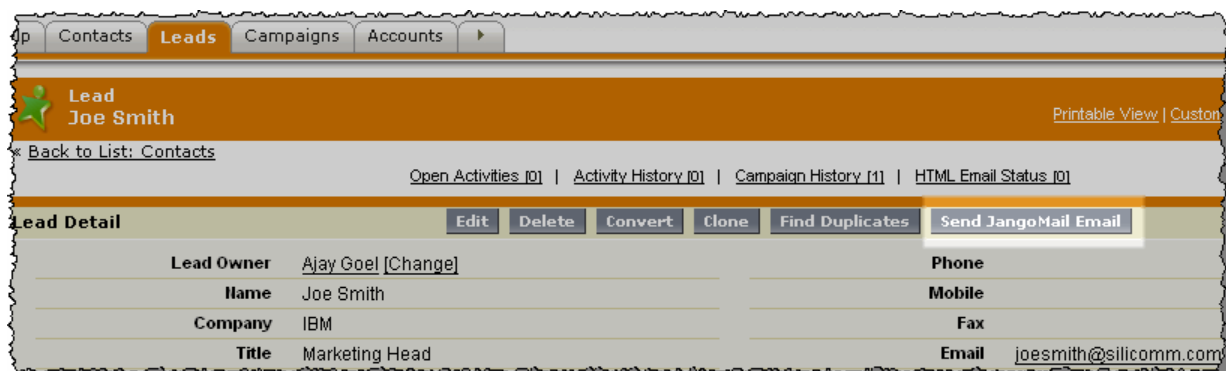
7. Stay in **Customize --> Contacts --> Search Layouts**. Now click **Edit** next to **Contacts List View**. Again, add the two buttons **Send JangoMail Email to All Contacts** and **Send JangoMail Email to Selected Contacts**. Then click the **Save** button underneath. You will now be able to send an 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 of the page by clicking the drop down arrow next to your login name.
2. Navigate to **App Setup --> Customize --> Leads --> Page Layout**.
3. To **Edit** the **Lead Layout**, click on **Buttons** in the top panel. Drag the **Send JangoMail Email** button down into the **Contact Detail** area for buttons. When you release the button, it will appear in a section labeled, **Custom Buttons**. To save, click **Save** at the top of your page. **You will now be able to send an on-the-fly JangoMail email campaign to a single Lead.**



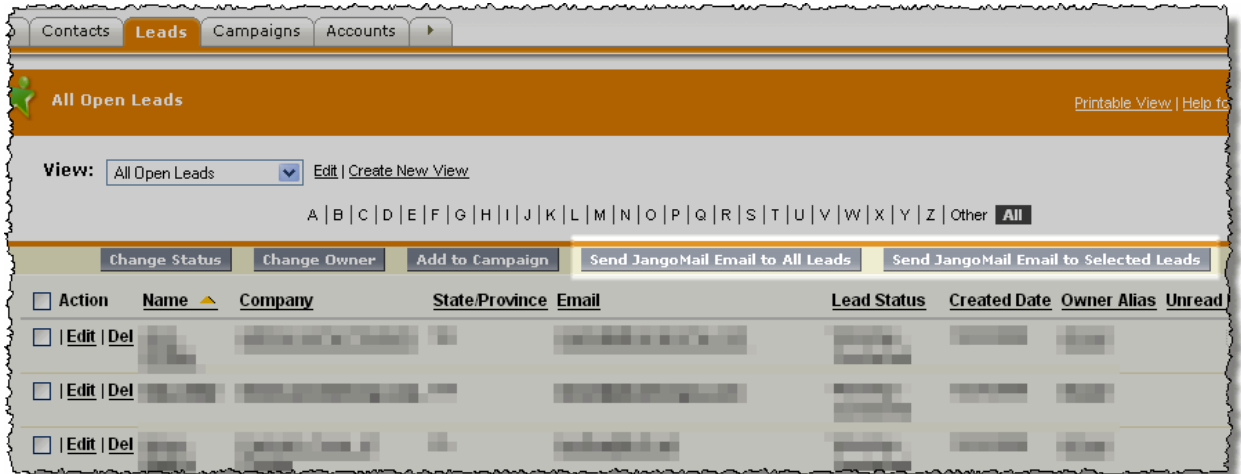
4. Stay in **Customize --> Leads --> Page Layout**. Again, **Edit** the **Page Layout**: click on the section for **Custom S-Controls** at the top of the page. First, drag a new **Section** down into the page layout, positioned where you wish. Set the Section Name to **JangoMail Campaign History**, with **1-column layout** for its setting. 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 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.

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

6. 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.

7. Stay in **Customize --> Leads --> 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 **App Setup --> Customize --> Campaigns --> Page Layout**.

3. Click on **Buttons** in the top panel. Drag the **Send JangoMail Email to Campaign Members** button down into the **Contact Detail** area for buttons. When you release the button, it will appear in a section labeled, **Custom Buttons**. 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](#)

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

## Need help?

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