

Configuring Salesforce to Route Email via Rocketseed

Introduction

Users may wish to route outbound email from Salesforce via Rocketseed. This allows Rocketseed email media to be inserted in the messages. In the simplest case, the media are inserted automatically based on rules defined within the Rocketseed server. This will occur in both automatically-generated emails and in ones explicitly sent from Salesforce.

An additional facility is available to allow Salesforce users to choose the media applied to each message they compose. When this feature is activated, each time an email is composed within Salesforce, the user can select the email media from a graphical display of available banners. Adding this feature requires that the Rocketseed Salesforce application be installed, as described in another document.

Note: depending on the volume of automatically-generated emails sent from Salesforce, activation of these features may increase the required capacity of your Rocketseed server and may have impact on pricing.

Request Activation of Email Relaying

To enable email media you must request that Salesforce allow activation of mail relaying to the Rocketseed server.

You must open a Case in your Partnerforce login and provide the following information.

- Server name and IP address of the Rocketseed server, as provided by Rocketseed
- Indicate that TLS is already be enabled on the Rocketseed server
- Indicate that incoming IP addresses have already been configured in the receiving Rocketseed server
- Provide your Salesforce administrator's contact email address

Here is a sample Case request for your reference:

1. Brief description of the issue:

Please enable email relaying from my new org

2. Org ID:

<enter your Salesforce org ID here>

3. Outbound mail from this org will route to

<rocketseed server URL>

at <rocketseed server IP address>

4. That relay is already set to accept email from these IPs:



96.43.144.65
96.43.148.65
182.50.78.65
204.14.232.65
204.14.234.65

5. the relay is set up to accept TLS
6. contact information: <your salesforce admin contact info>

Enabling Email Relaying

Once the request above has been granted, log on to your Salesforce org.

Navigate to Setup->Administration Setup->Email Administration->Email Relay Activation

If this option is not available, contact your Salesforce representative to open a case to enable email relaying.

- (a) **Email Host** – the hostname of the Rocketseed Server that will be relaying the email
- (b) **Port** – 587 is preferable but port 25 can be used instead if desired
- (c) **TLS Setting** – it is preferred that TLS be enabled for email security
- (d) **Active** - tick this checkbox to activate the mail relay
- (e) **Save** – to save the new settings



Enabling Explicit Selection of Email Media

The preceding steps will allow all mails generated within Salesforce to be routed via your Rocketseed server. By default, the email media will be selected by the rules defined there. If your organization has installed the Rocketseed app for Salesforce, you can enable explicit selection of the email media inserted in each message you compose.

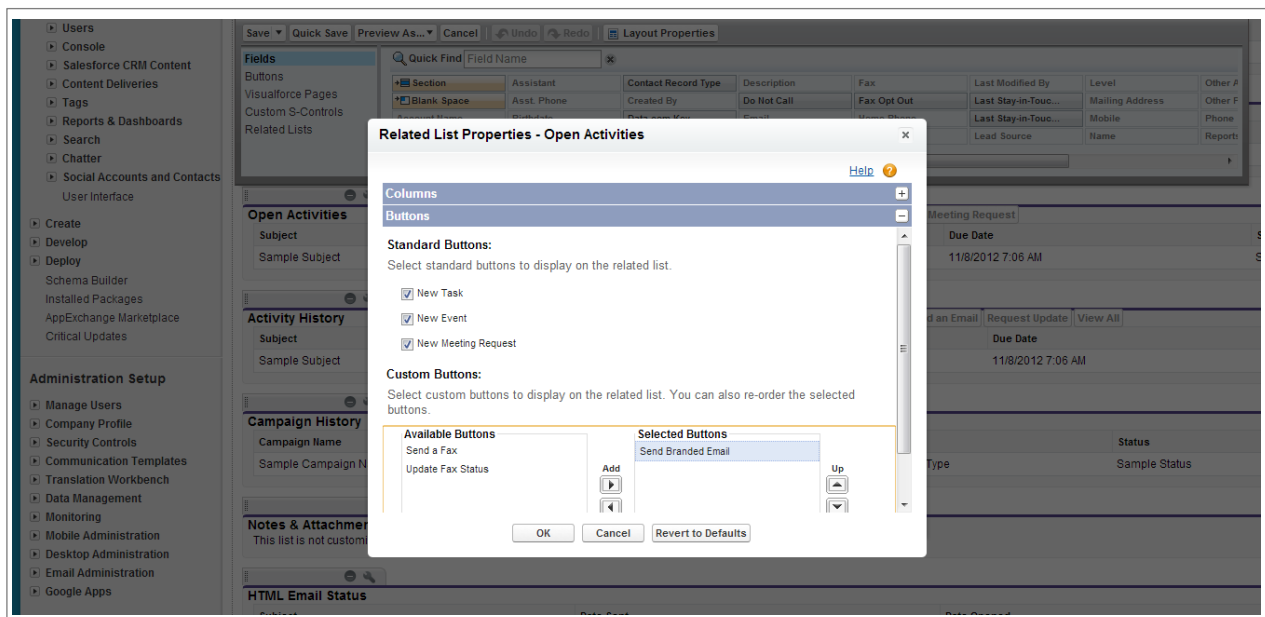
The steps below can be performed after the Rocketseed app has been installed in your Salesforce org.

Contact Screen Layout - Rocketseed Button

Navigate to App Setup->Customize->Contacts->Page Layouts

Click **Edit**

Click the wrench icon above the Activity History related list



Select Buttons

Add the *Rocketseed* button from the Available buttons.

Click **OK**

Click the **Save** button at the top of the page



Lead Screen Layout - Rocketseed Button

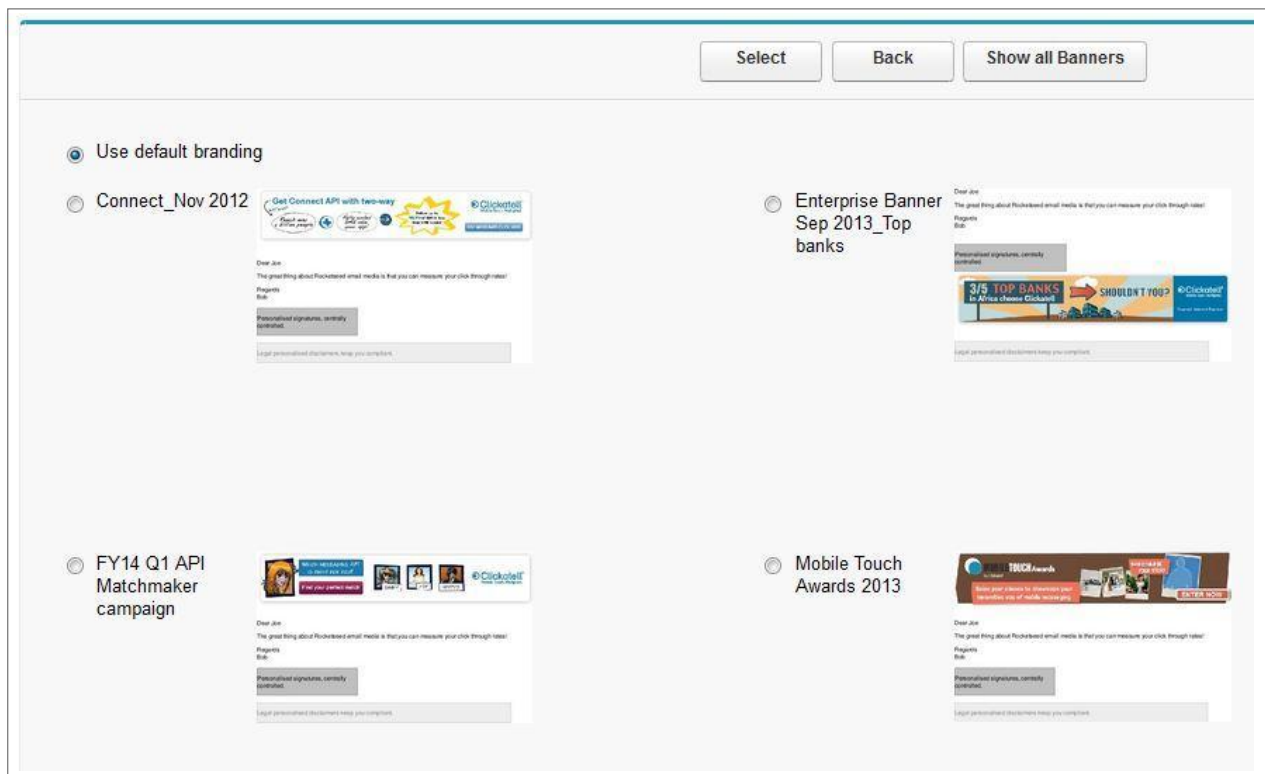
Navigate to App Setup->Customize->Leads->Page Layouts

Repeat the steps from the previous section to add the Rocketseed button to the Leads page.

Selecting the Rocketseed Media to Use in an Email Message

Once the setup steps above have been performed you can use the Rocketseed button in a Lead or a Contact details page. This will allow you to select the email media to apply to the email being composed to the selected Lead or Contact.

When you click the Rocketseed button you will be taken to a page similar to this one:



The banners that are displayed initially are the ones that have been assigned to your email address by those who administer your Rocketseed email media. You can click the **Show all Banners** button to see a list of all available email media.

Hovering the mouse over any banner image will pop up a larger view. Tick the radio button next to the banner you wish to select, or leave the selection at **Use default branding** to have one of the banners selected at random.



After making your choice, click the **Select** button to go to the email composition window.

There are a few points to notice.

- If you selected a banner, the email subject line will be populated with the keyword that will cause that banner to be added upon delivery. You should leave the text within the square brackets unchanged - it will be removed during delivery.
- Type the actual subject line of your message after the [text in square braces]. Your subject line will be the only part visible to receivers, and your mail will be delivered with the specified email media attached.
- You should ensure that the Email Format is set to HTML so that the email media will display correctly.

Like all mails sent from Salesforce, a record will be maintained in the Lead or Contact's history. Any clicks on the attached email media will appear in the Rocketseed Alerts section of the person's page.