

# Salesforce integration with Ongage via Zapier – Use case

Few words on the use case of the integration:

As a marketer, sending promotional emails from Ongage while managing your CRM in Salesforce, you'll likely want every new Contact, Lead or Opportunity in Salesforce to get added automatically to your Ongage account, send them a welcome email, and start sending them promotional emails.

You can do this with the Ongage-Zapier integration, as well as to the ~750 other systems that Zapier provides integration with.

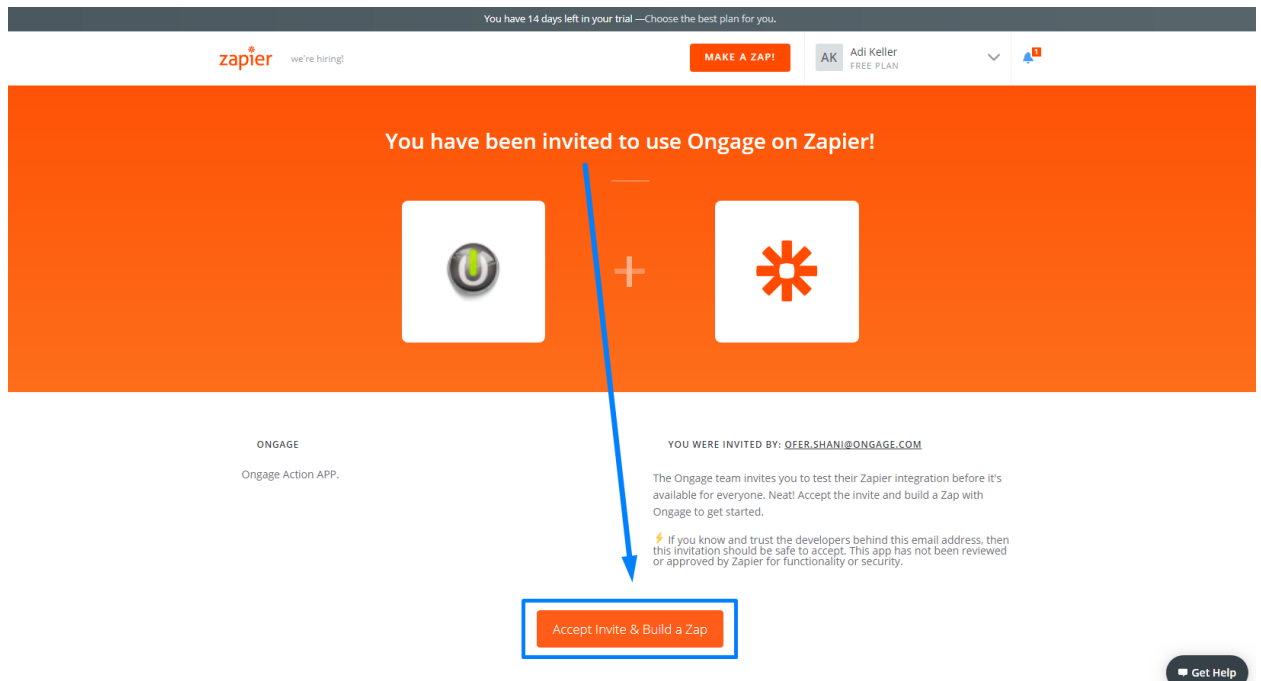
Preconditions: must have an active account in:

- ✚ Zapier
- ✚ Ongage
- ✚ Salesforce

Make sure you have a user that is allowed to connect via API both to Salesforce and Ongage

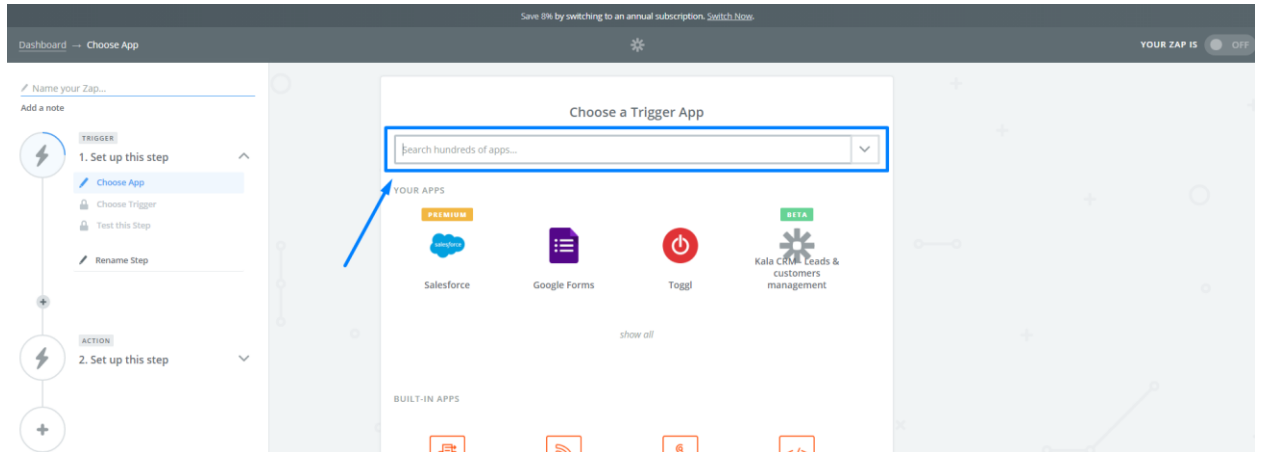
1. Login to your Zapier account at <https://zapier.com/>
2. Download the Ongage Zap in the “Tap search” or directly using this link – <https://zapier.com/developer/invite/83204/8ca50cf523bc5a147242e1e61fbeaab5/>

Press on the ‘Accept invite & Build a Zap’ to get started

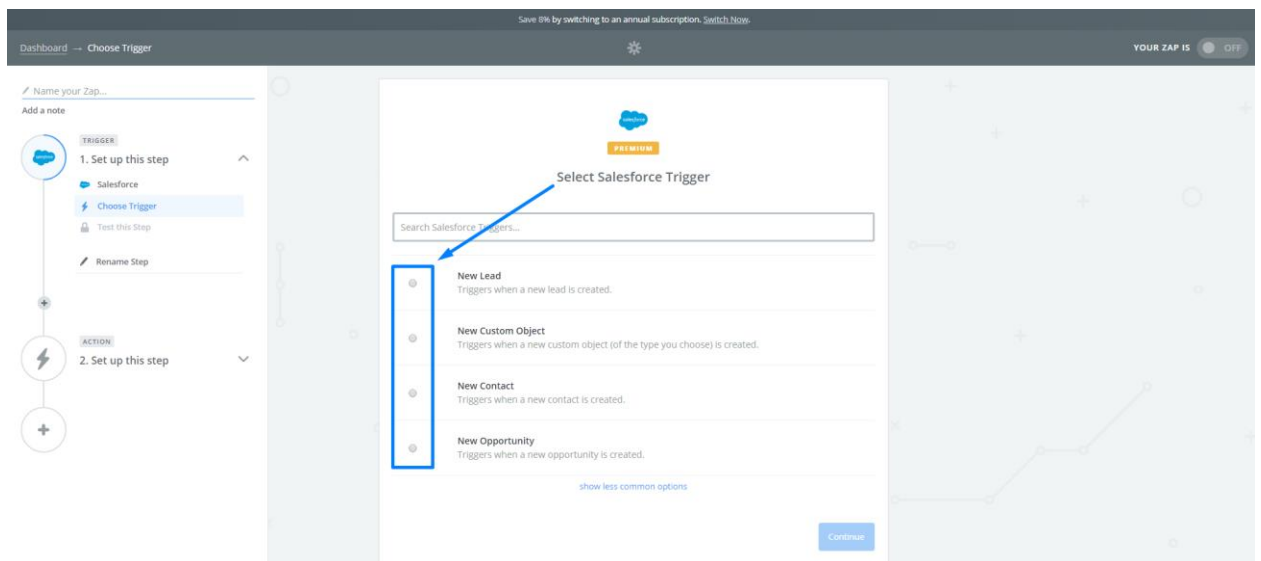


**Trigger App:** when a chosen action happens in it, it will be the trigger to do something in another app – in our case, when a certain action will happen in SF, it will trigger an action in Ongage.

3. In 'Choose a Trigger App' search bar, search 'Salesforce' and choose it  
Please note that the Salesforce integration is a premium Zap, which cost ~\$20/month



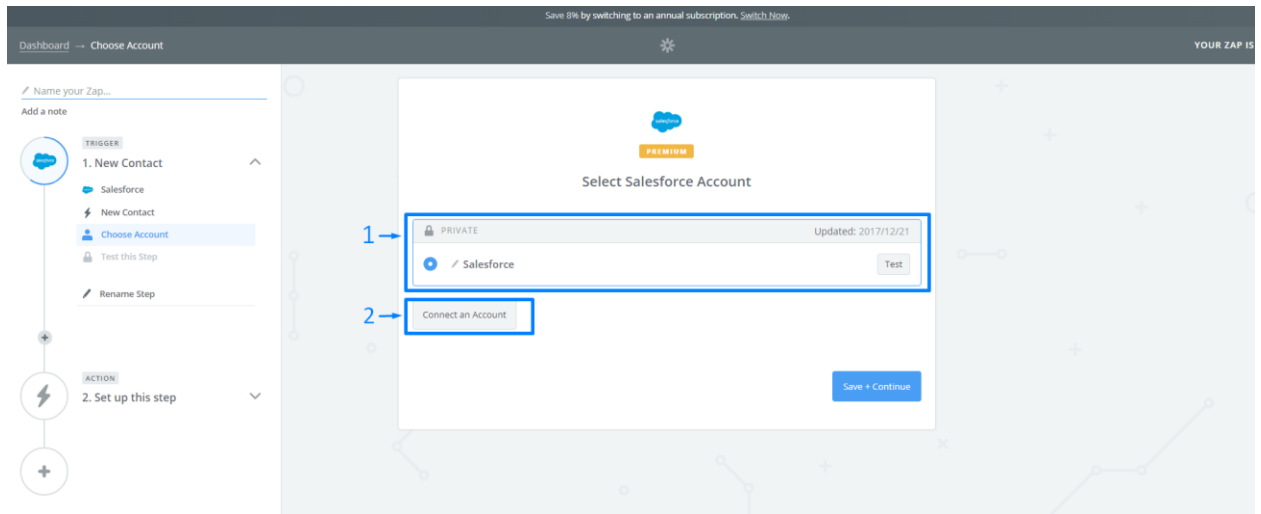
4. In 'Select Salesforce Trigger', choose one of the four options presented: New Lead, New Custom Object, New Contact, New Opportunity  
Once chosen, press on the 'Save + Continue' button



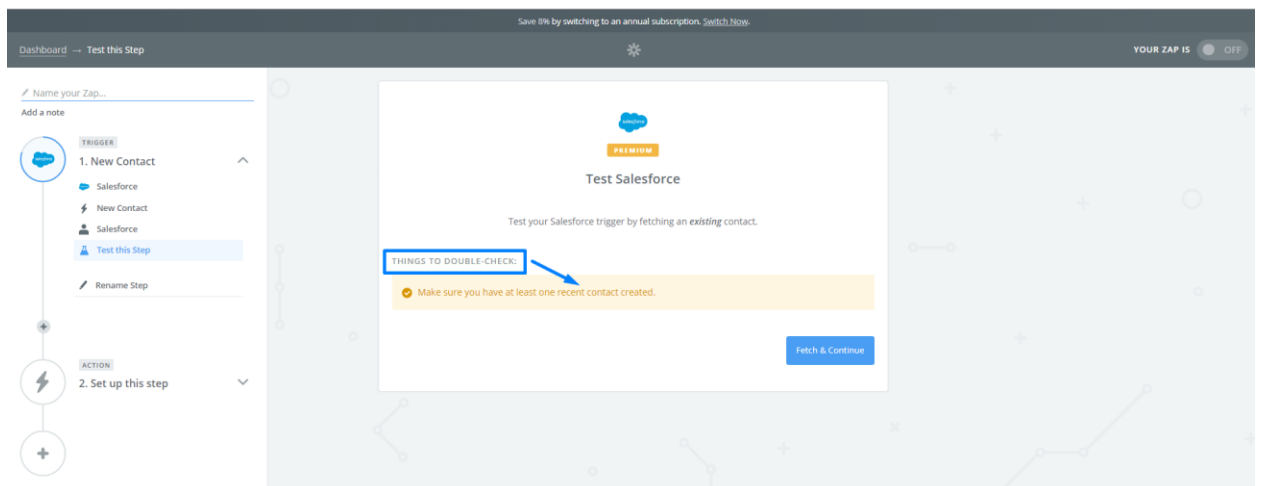
5. In 'Select Salesforce Account', there are two options:
  - a. Should it be your first ZAP, click on the 'Connect an account' button. A new window will pop up, enter your Salesforce account's credentials
  - b. Should this be your 2<sup>nd</sup> time or more, choose the required account (out of the accounts you previously logged in with)

When connecting to Salesforce, be sure you're connecting to your Production account or to the relevant Sandbox account.

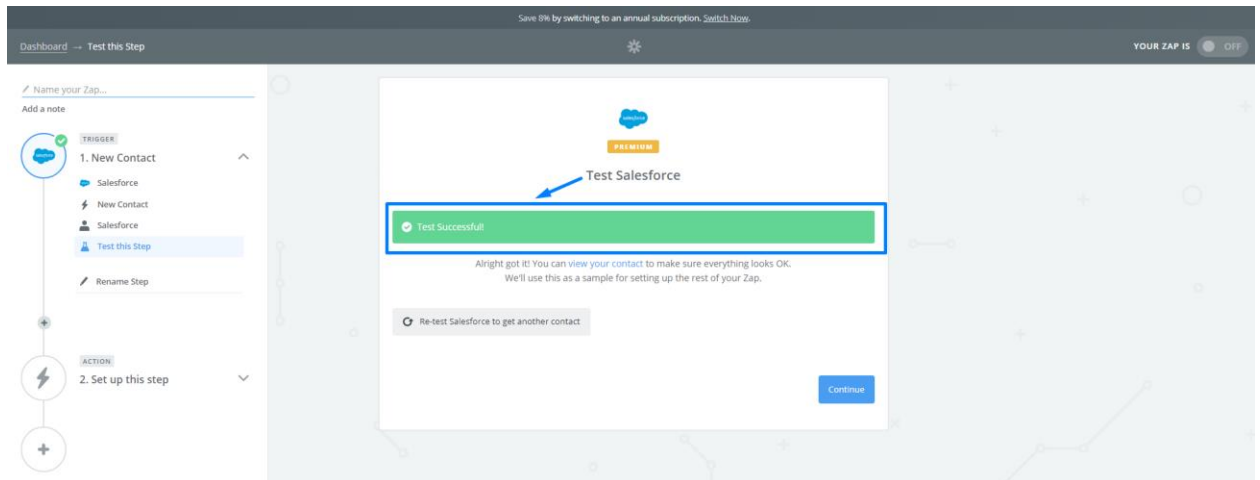
Once completing this step, press the 'Continue' button



6. After completing the previous step, in the next window a notification of 'Things to double check' will be displayed, follow this order by pressing the 'Fetch & Continue' button

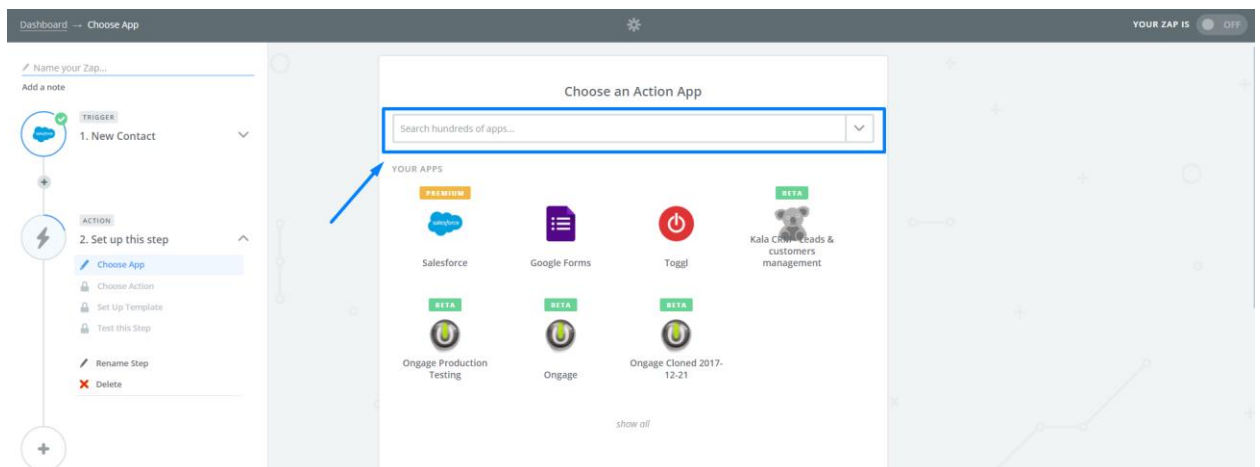


7. 'Test Salesforce' – once 'Test is Successful' notification is displayed, press the 'Continue' button

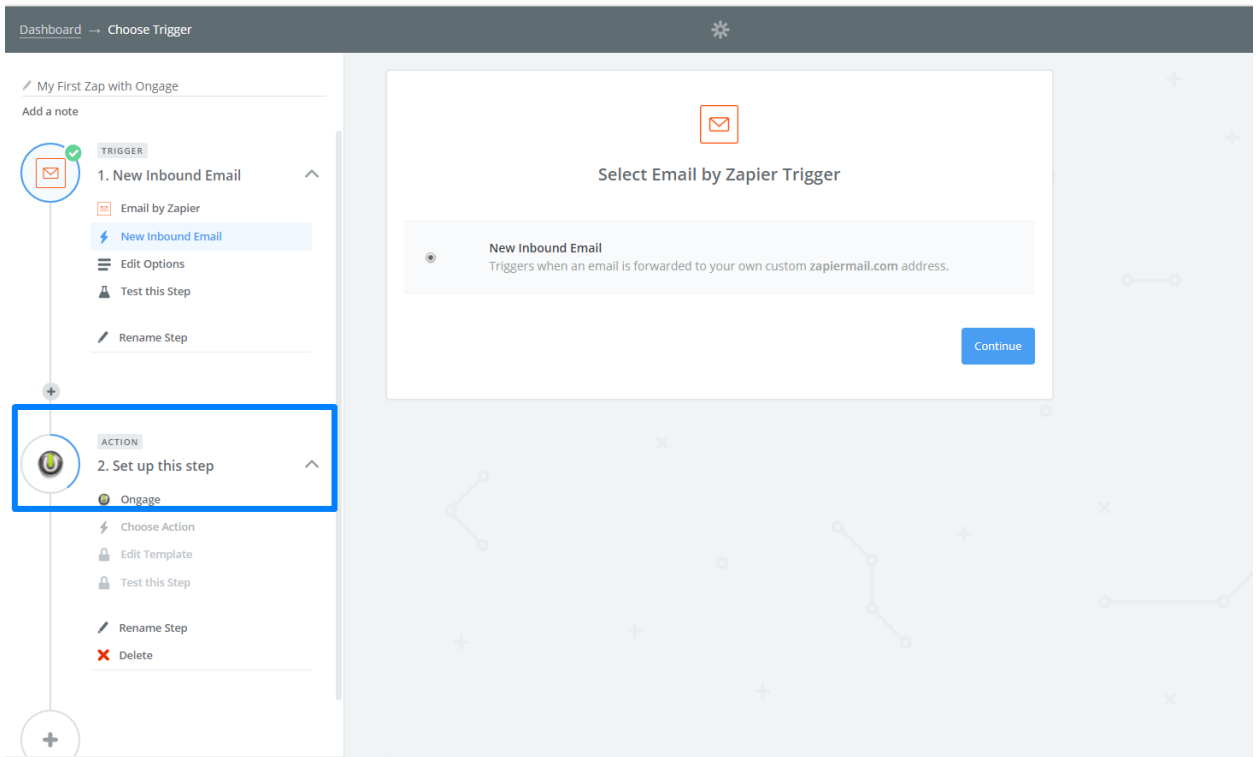


**Action:** the app in which an action will happen after the trigger was activated

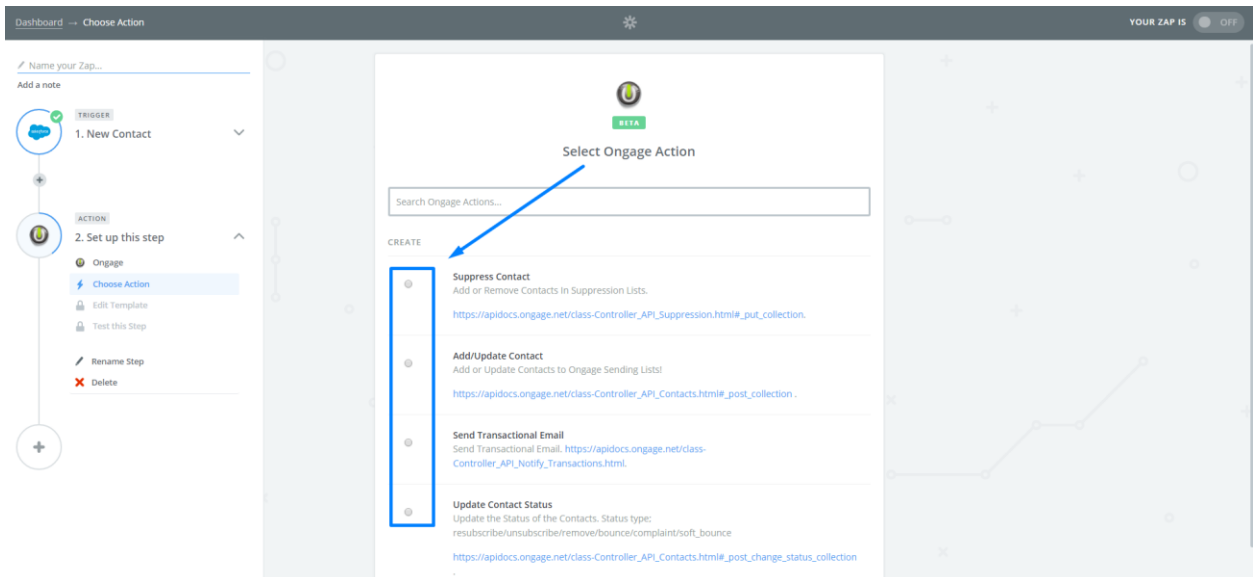
8. In 'Choose an Action App' search bar, search for 'Ongage' app and choose it



Note that, should you've accepted the Ongage invitation, the Ongage app will be automatically chosen for you



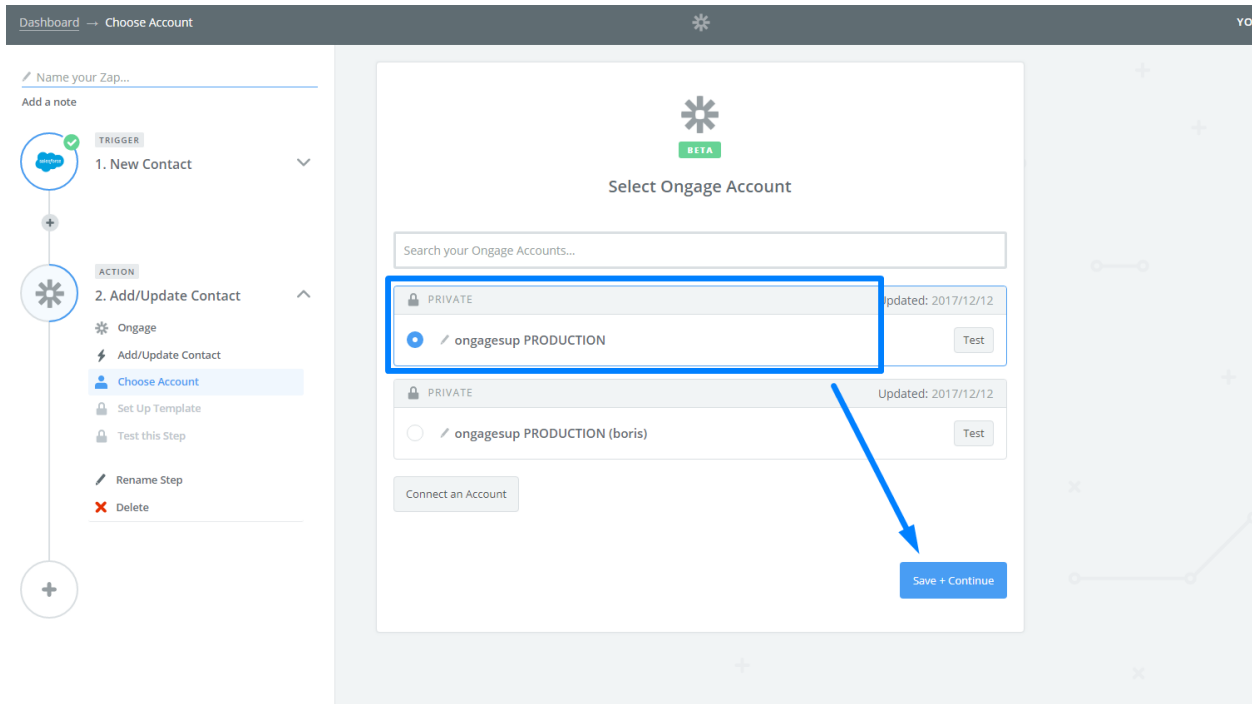
9. In 'Select Ongage Action', choose one of the four options presented: Suppress Contact, Add/Update Contact, Send Transactional Email, Update Contact Status  
In our case, please select "Add/Update contact" and press on the 'Save + Continue' button

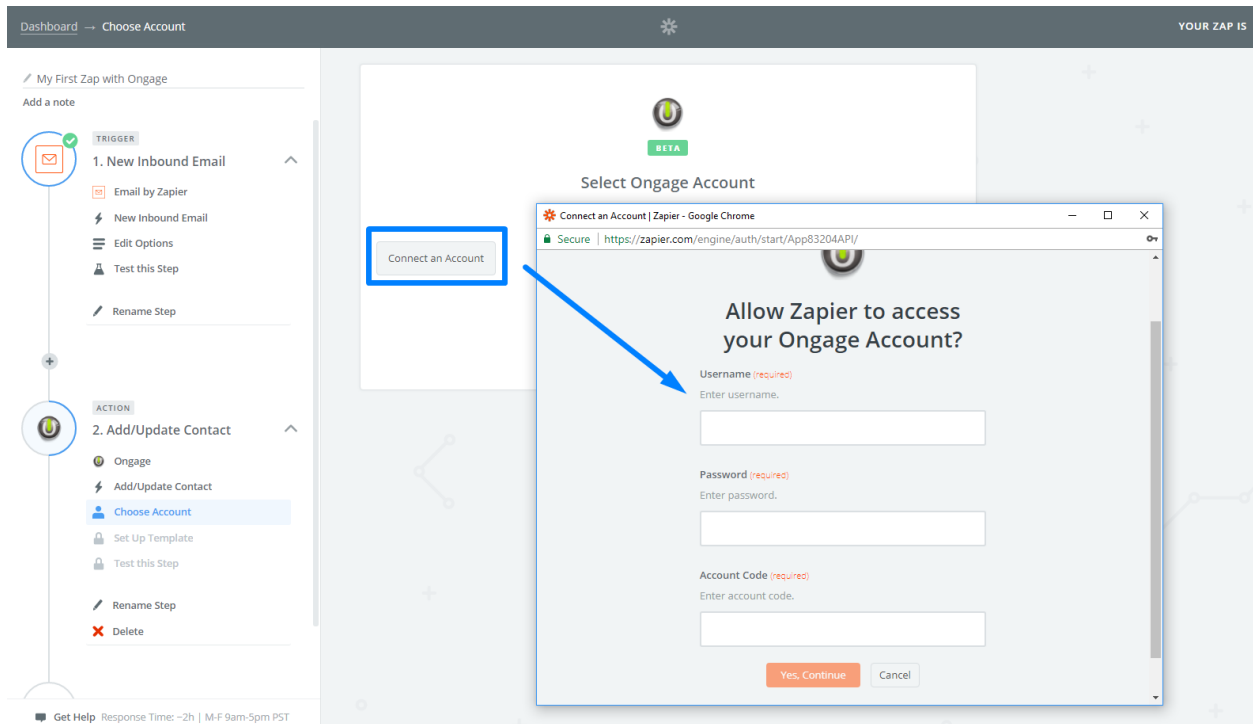


10. In 'Select an Ongage account' there are two options:

- a. Should it be your first ZAP, click on the 'Connect an account' button. A new window will pop up, enter your Ongage account's credentials
- b. Should this be your 2<sup>nd</sup> time or more, choose the required account (out of the accounts you previously logged in with)

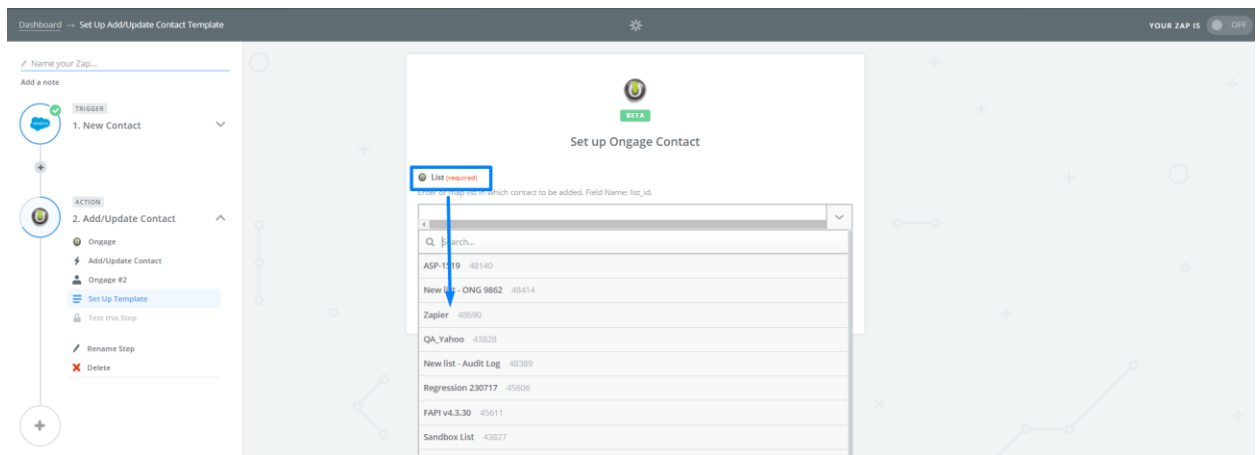
Please note that in addition to User/Password you also need to provide your account code, which you will be able to find in your profile. If you don't know what your account code is, please contact Ongage support.

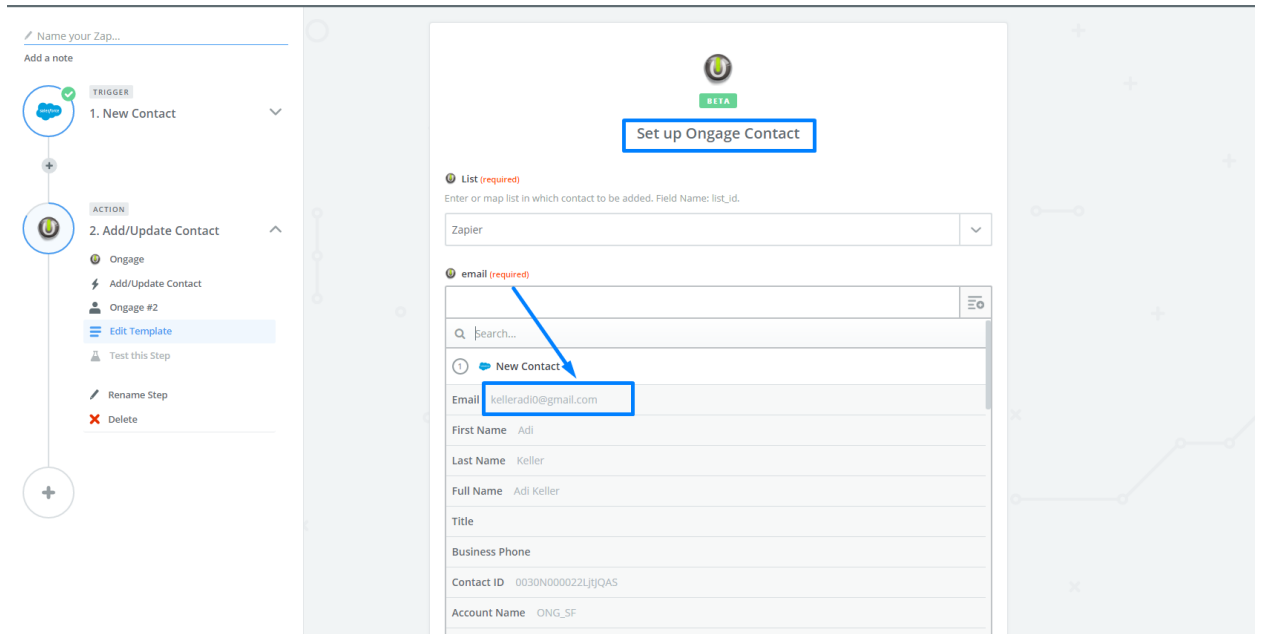




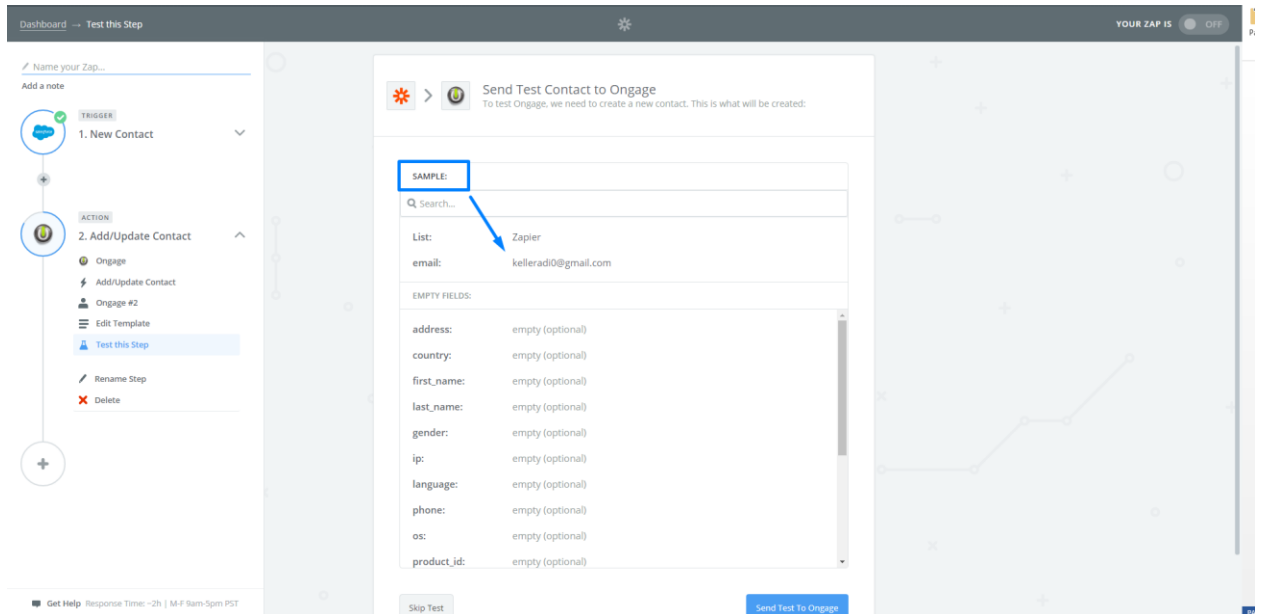
- In 'Set an Ongage Account', after choosing an account, need to choose the required list. Once the list is chosen, a list of the list's fields will be displayed. Please note that the contact will get created in the list you're selecting. You can use it to have separate lists for Salesforce Contacts and Leads.

Fill in the fields in one of two ways, you can either fill them manually or choose from the dropdown. Note that if a field is obligatory in your original Ongage account, it will be obligatory here as well



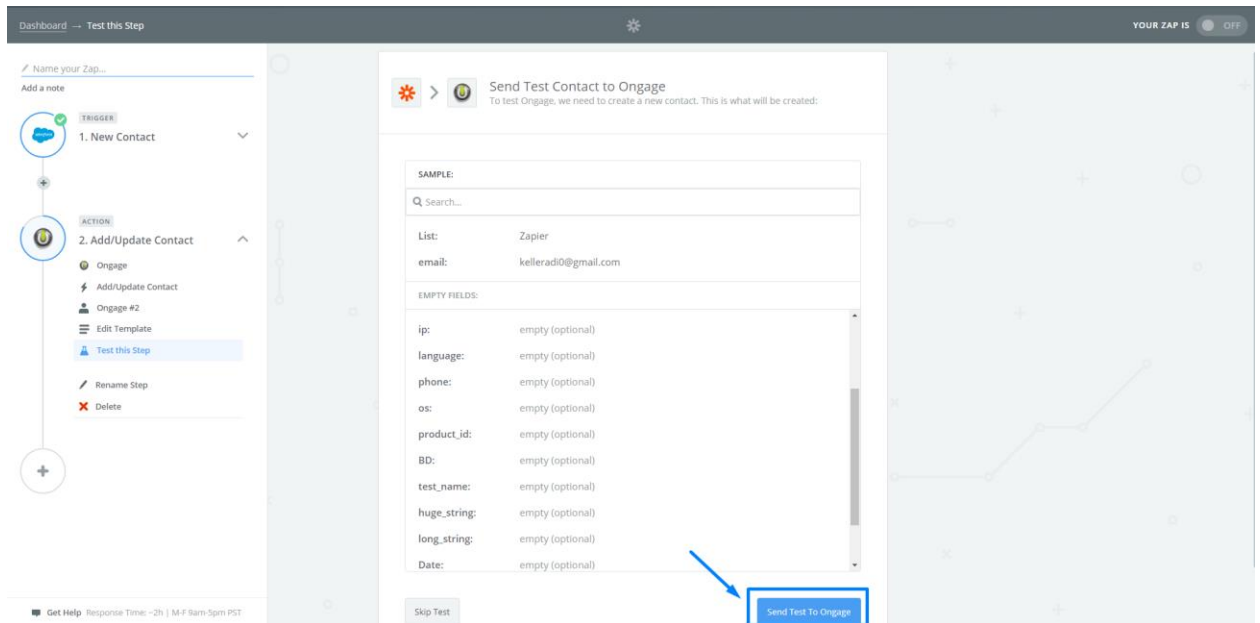


12. Next window will display a sample of the added contact, press the 'Send Test to Ongage' button



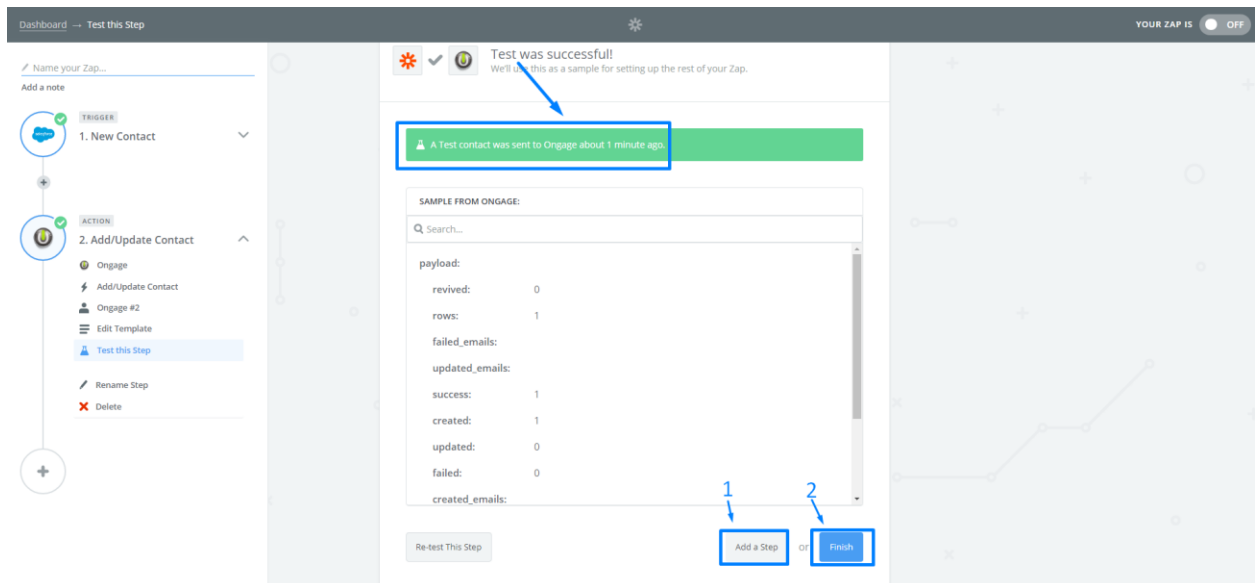


### 13. Press 'Send Test to Ongage'

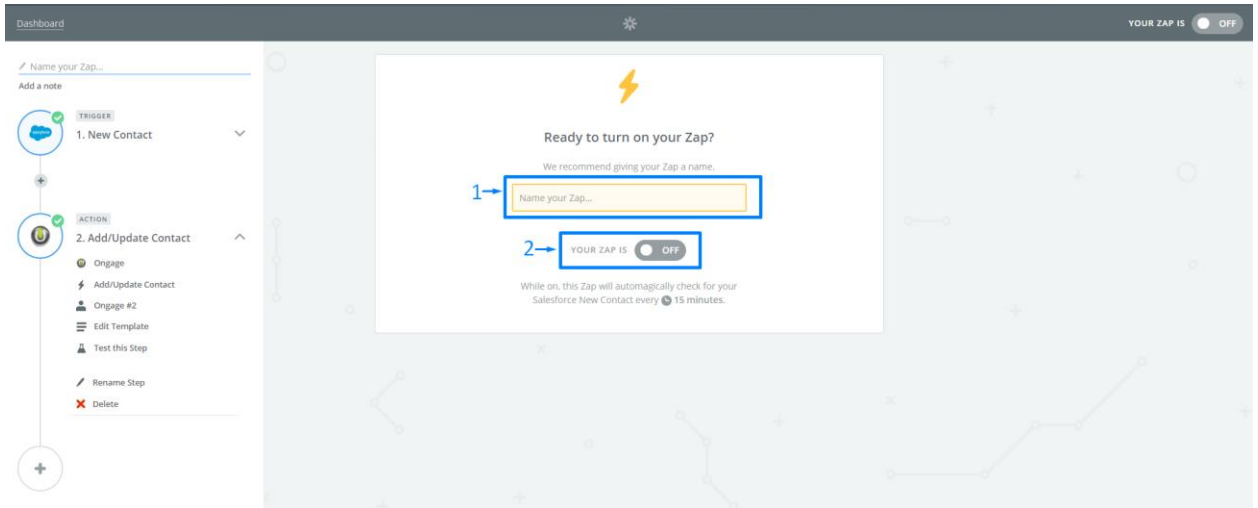


### 14. Next window will indicate whether the test was successful or not. Here you have 2 options:

- Press the 'finish' button, at which point the Zap will be ready
- Press the 'Add a Step' button, at which point you will be able to repeat the 'Action' part in order to add an additional action. For example, in addition to add a contact to the account, a transactional email will be sent as well



15. Once the previous step is done, name the Zap and turn it on (in the case of Salesforce integration, a small fee is required)



Once activated, all you have to do is to create new Contact/Lead in Salesforce, and see it in Ongage. Please note that Zapier run asynchronously (every 15 minutes or so), so some delay is expected when coming to see the contact on Ongage side.