

Documentation Salesforce Marketing Cloud

Integrate step by step



marketing cloud

Account creation

Create an account in the SerwerSMS service. After going through the whole procedure of account activation in the system, you will be provided with a token, which will allow you to register in the intermediary panel: salesforce.serwersms.pl/panel. (login remains the same for the main panel and the intermediary panel)

Rejestracja

Rejestracja dla firm, urzędów i instytucji.

• • • Aktywuj w 5 minut! • • •

Odbierz pakiet 100 wiadomości i testuj 14 dni za darmo!

Tylko u nas ShortCode 4301 GRATIS!

Login *

Adres e-mail firmowy *

Numer telefonu *

Hasło *

☐ Zapoznałem się i akceptuję postanowienia [regulaminu](#), [polityki prywatności](#), [klauzuli informacyjnej](#) oraz [polityki antyspamowej](#). *

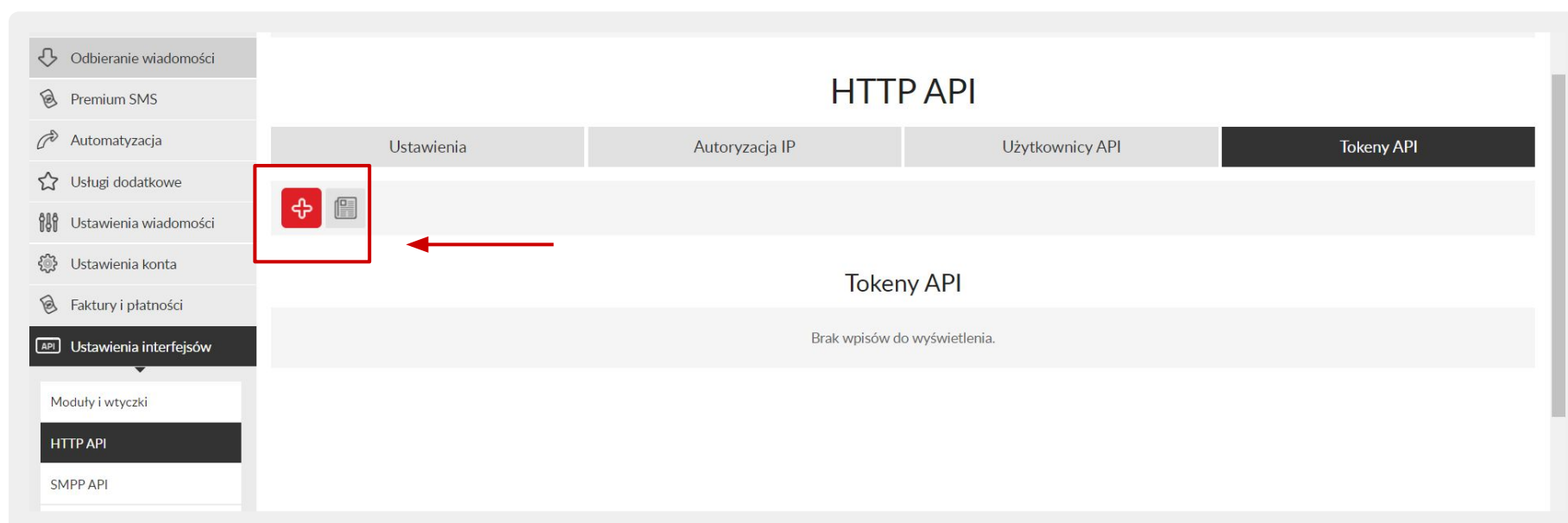
☐ Wyrażam zgody na przesyłanie informacji handlowych oraz marketingowych drogą elektroniczną
[Klauzula informacyjna](#). [Szczegóły](#)

[1/2] Dalej

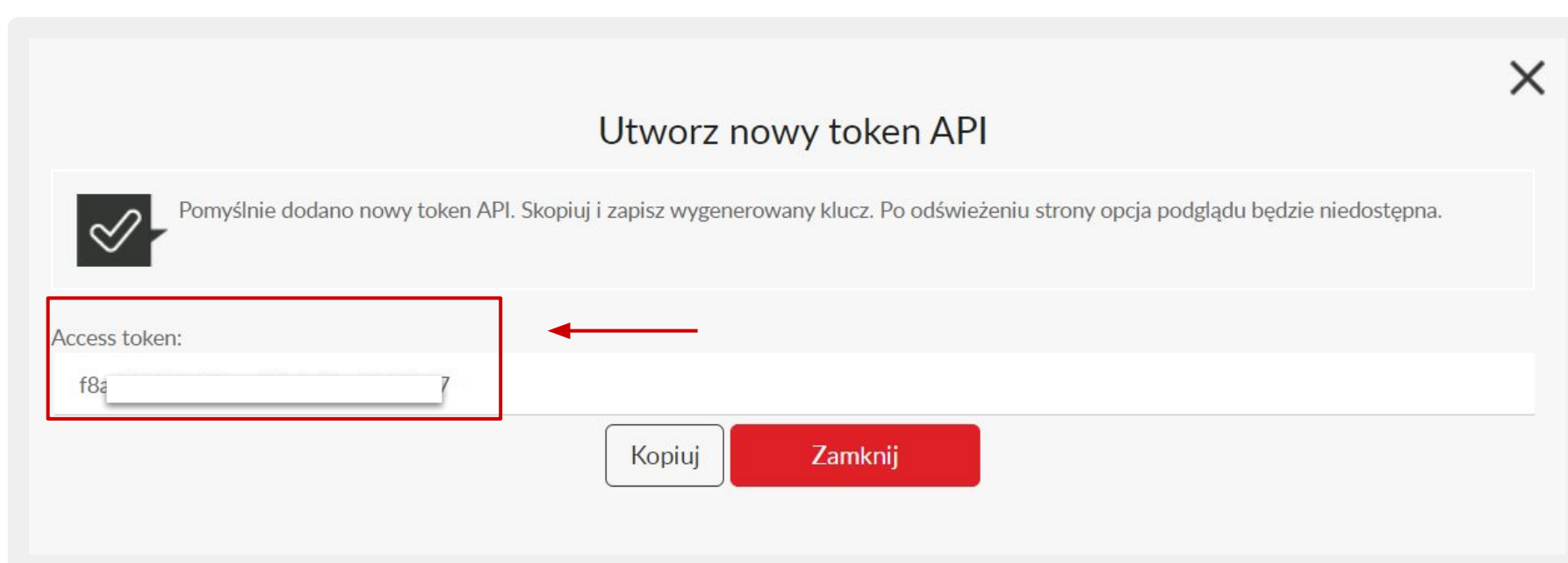
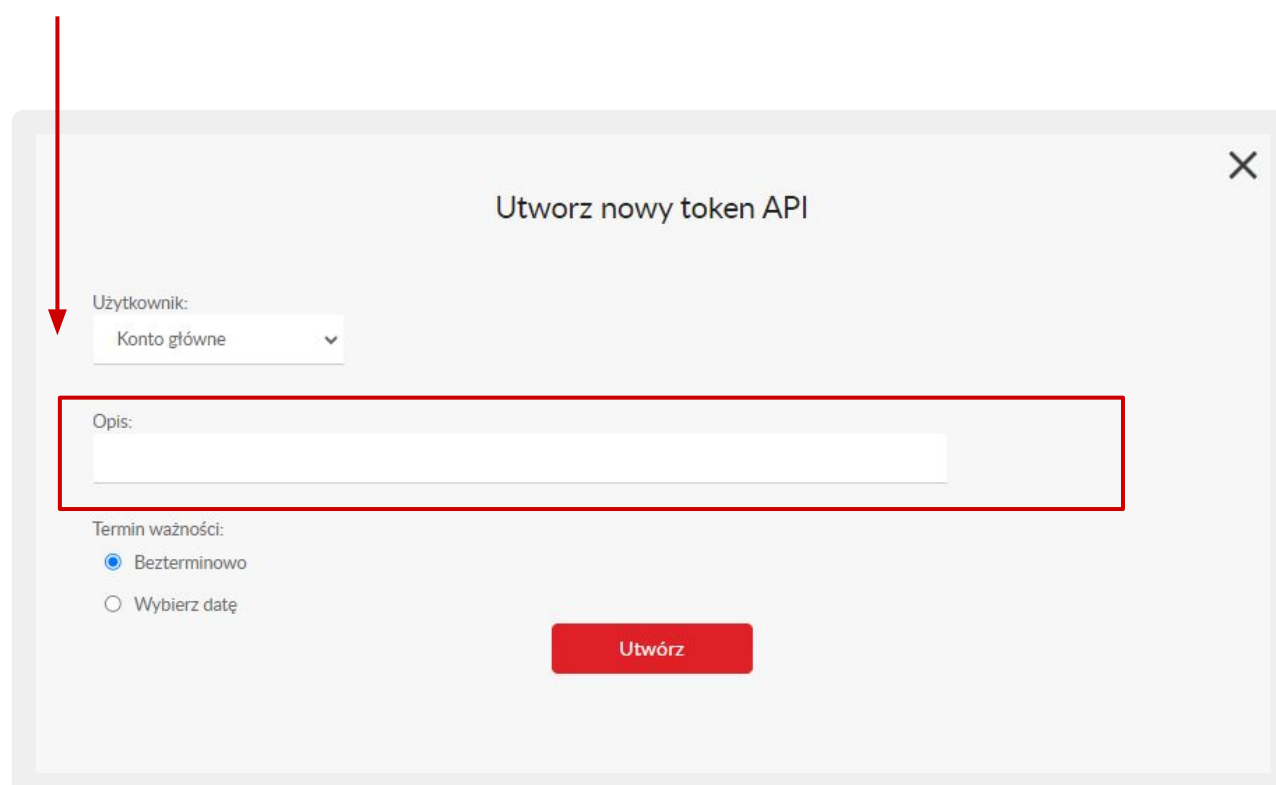
* Pola obowiązkowe

Token generation

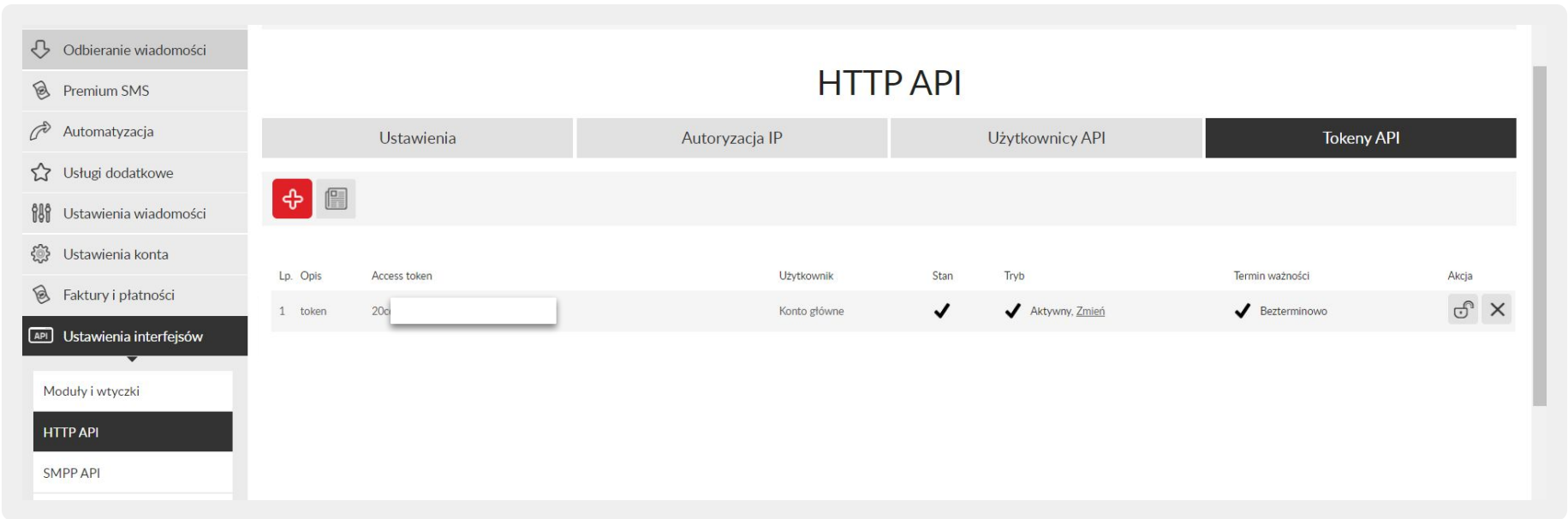
After logging into ServerSMS, go to the interface settings tab → HTTPAPI → Tokens. Click the plus icon as indicated in the graphic below.



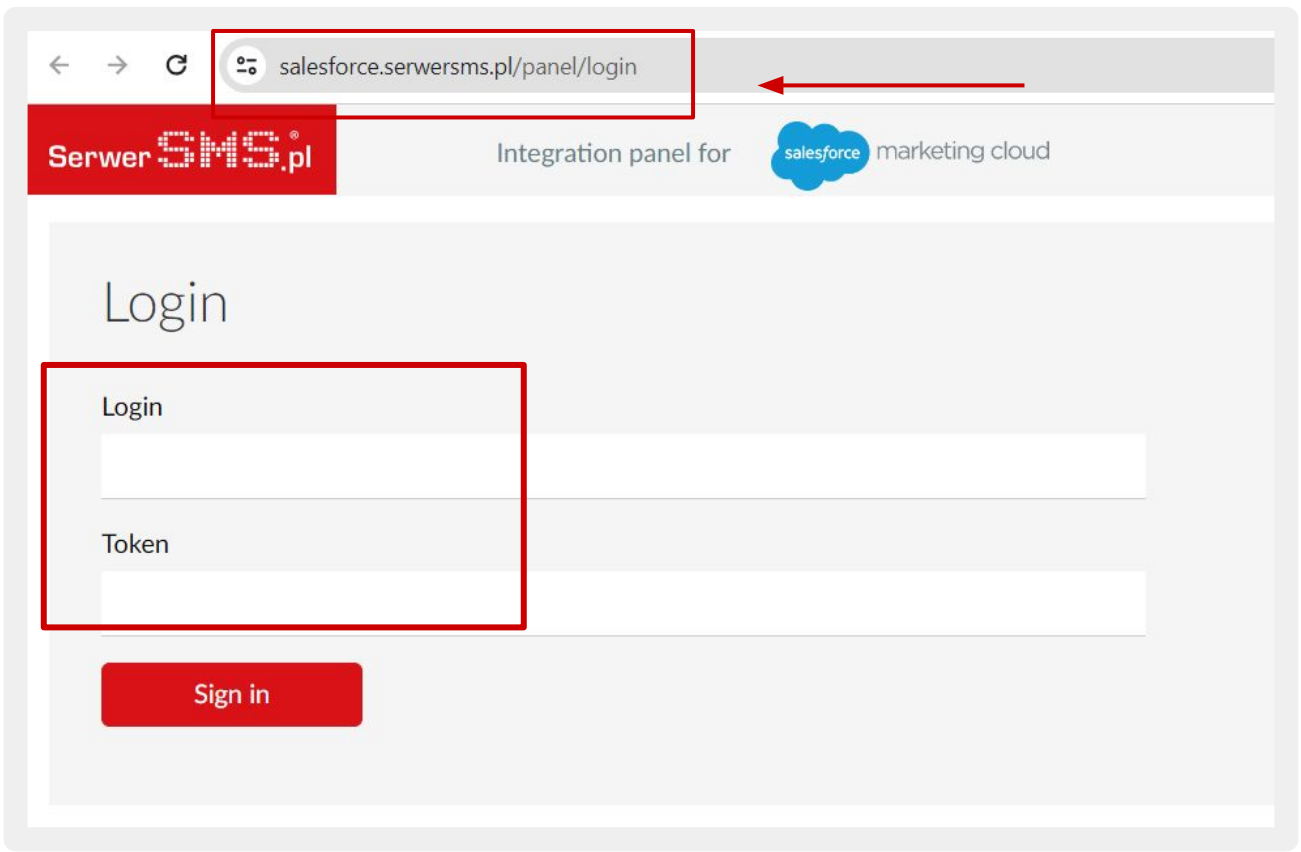
Name the Token (Description) and click the create button. If you notice a new window with a description that you have successfully added a new API token then you can copy the token and close the window. Use the token along with your login to log in to the middleman panel.



After closing the window, you will notice the generated token



Now go to the intermediary panel and enter the login and token in the marked spaces. The login is the same as when you registered your account.



Generate keys to connect applications

Below you see the settings form. To generate a URL, press both "Generate" buttons (this will generate a Webhook token and a "Key"). The parameters will create a unique "URL for SFMC", which you will use in the next step. Remember to save the settings.

The screenshot shows a settings form for SerwerSMS.pl. The form is divided into several sections:

- URL SFMC**: A text input field containing "http://...pcw58z4ld". Below it is a "Copy" button.
- Webhook token**: A text input field containing "ckd...". To its right is a "Generate" button.
- Key**: A text input field containing "sil...ld". To its right is another "Generate" button. A red arrow points to these two "Generate" buttons.
- JWT**: A text input field.
- Phone**: A text input field containing "{{Contact.Attribute.Serwersms.phone}}".
- Sender**: A dropdown menu showing "SerwerSMS".
- Checkboxes**:
 - ☒ UTF-8
 - ☐ Flash
 - ☐ Shorten URL
- URL for DLR**: A text input field containing "http://...reports". Below it is a "Copy" button.
- ClientID**: A text input field.
- ClientSecret**: A text input field.
- Base auth URL**: A text input field.

At the bottom of the form is a red "Save" button.

Note the three parameters at the very bottom of the graphic. They are ClientID, ClientSecret, Base auth URL - their use and generation will be described in the Reports section at the end of the documentation.

URL for DLR ⓘ

hl

#id/reports

Copy

ClientID ⓘ

ClientSecret ⓘ

Base auth URL ⓘ

Save

Tool settings

Go now to Salesforce Marketing Cloud by logging into the service.

salesforce marketing cloud

Username

Next

☐ Remember me

Get the right teams the right data and win with Slack Sales Elevate.

Transform team productivity by automating everyday tasks and helping people focus on closing deals fast.

EXPLORE THE SOLUTION

Sales

Your Insights

\$1,250,000

↓ 25,000 (2%)

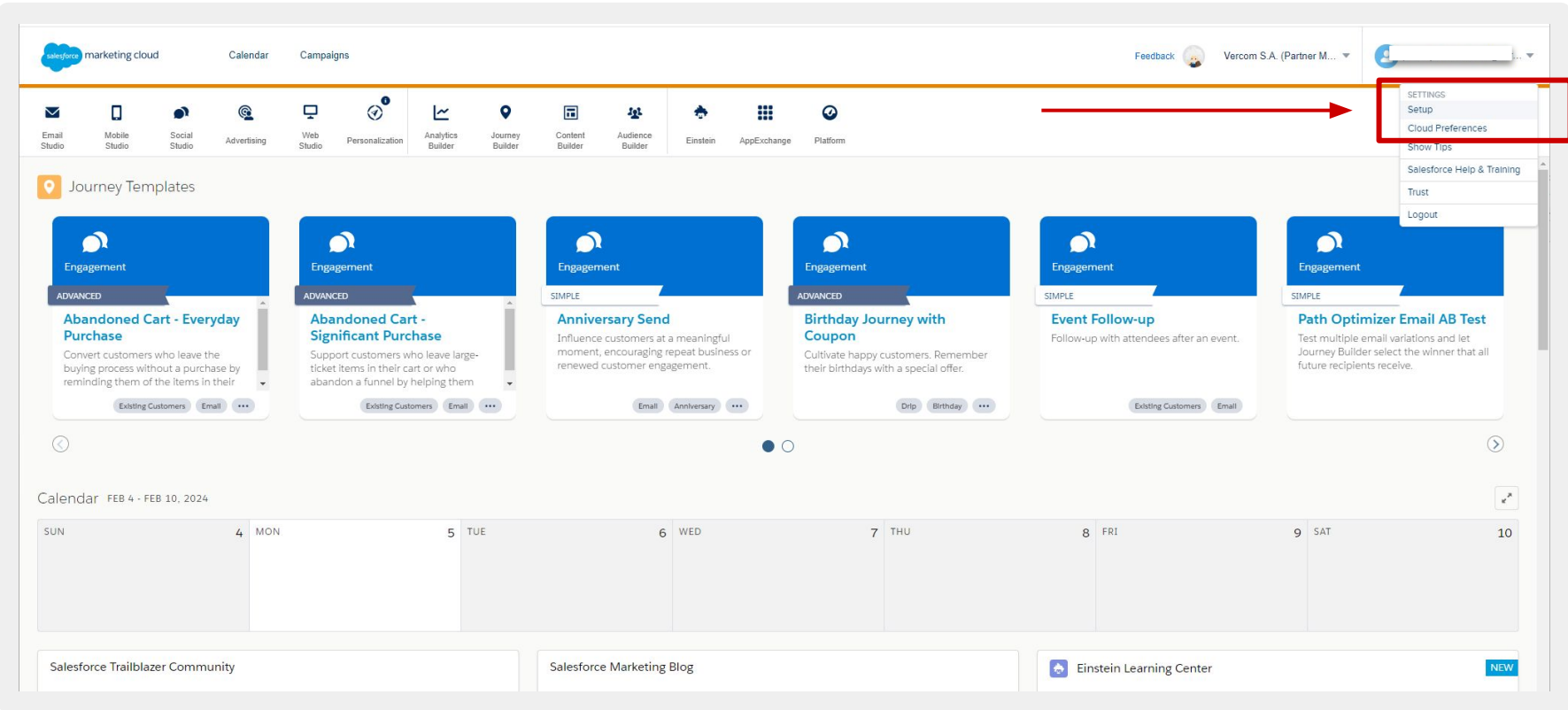
\$950,000

↓ 19,000

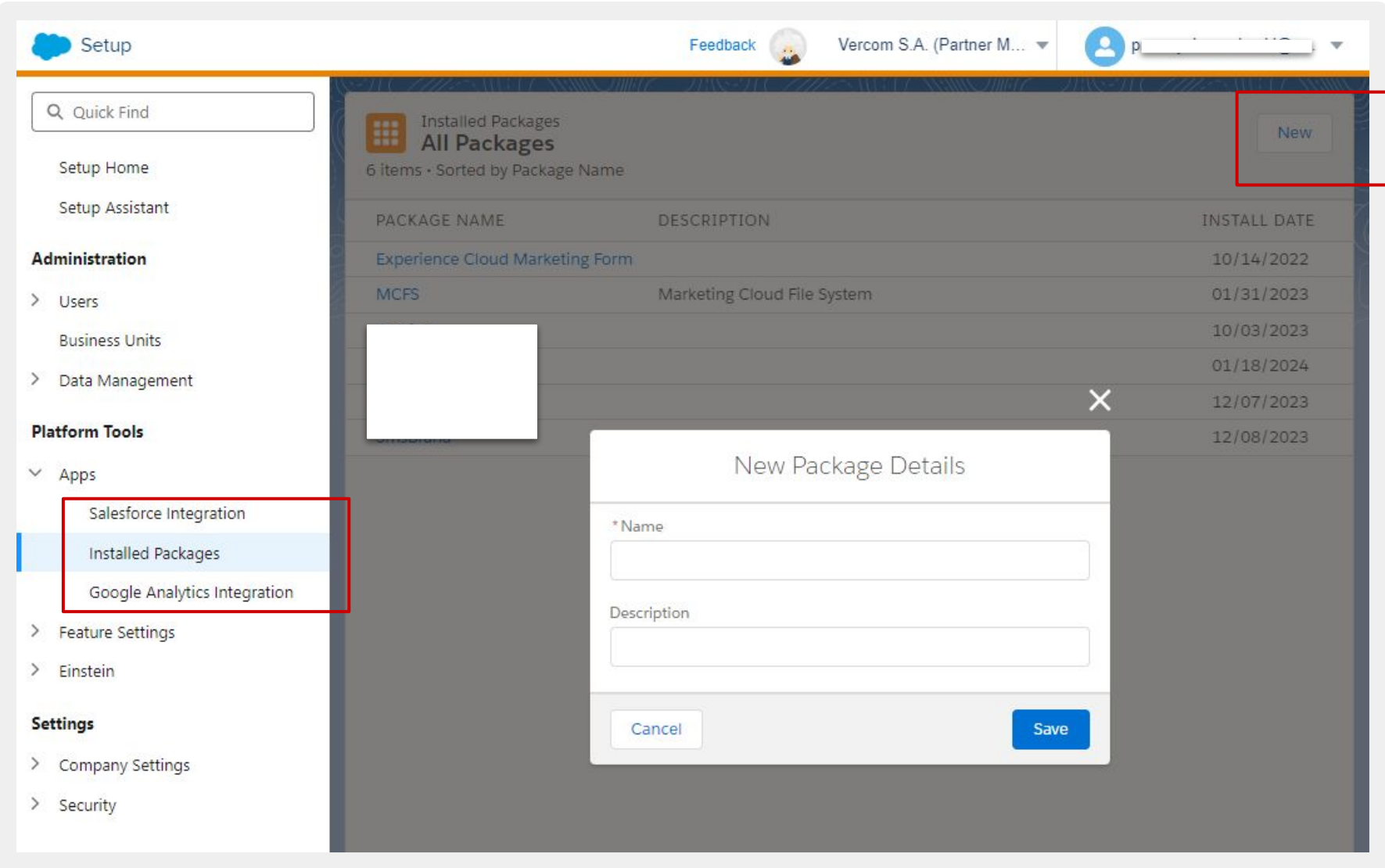
Opportunities closing soon

Acme - New Business Opportunity

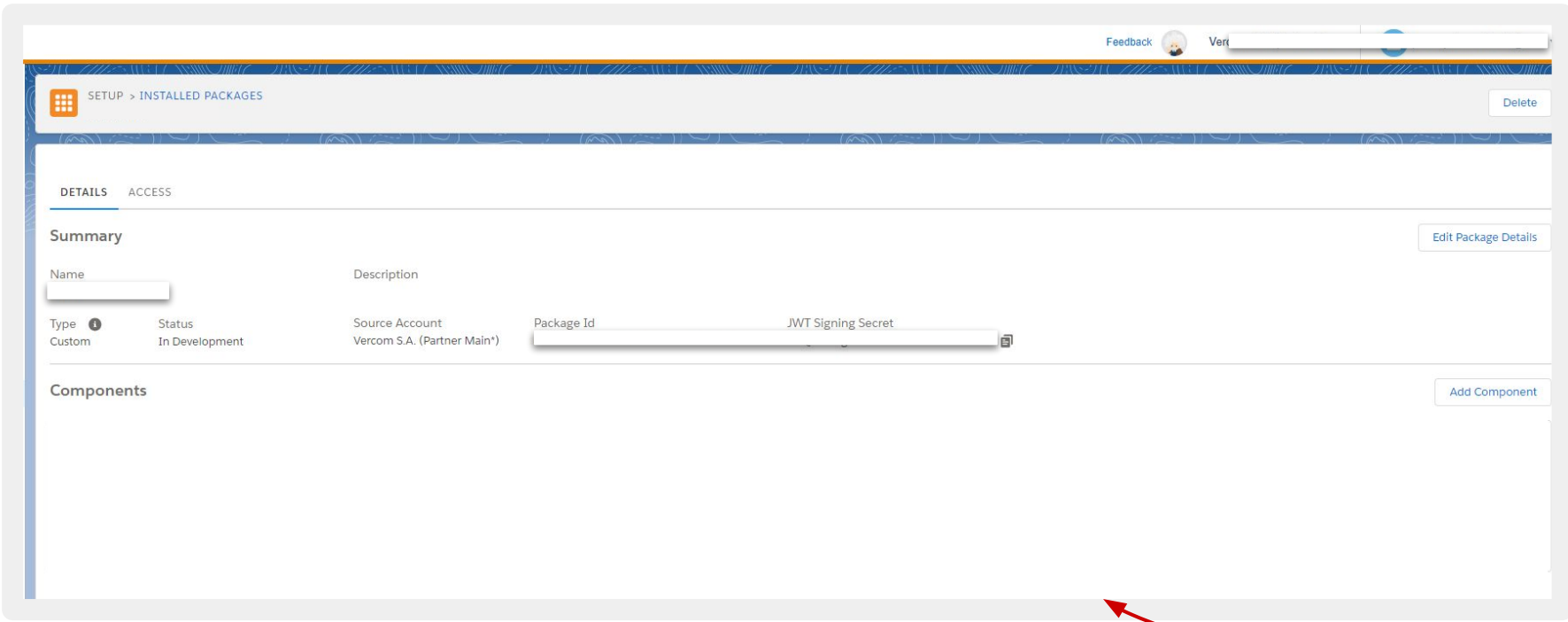
Select Setup.



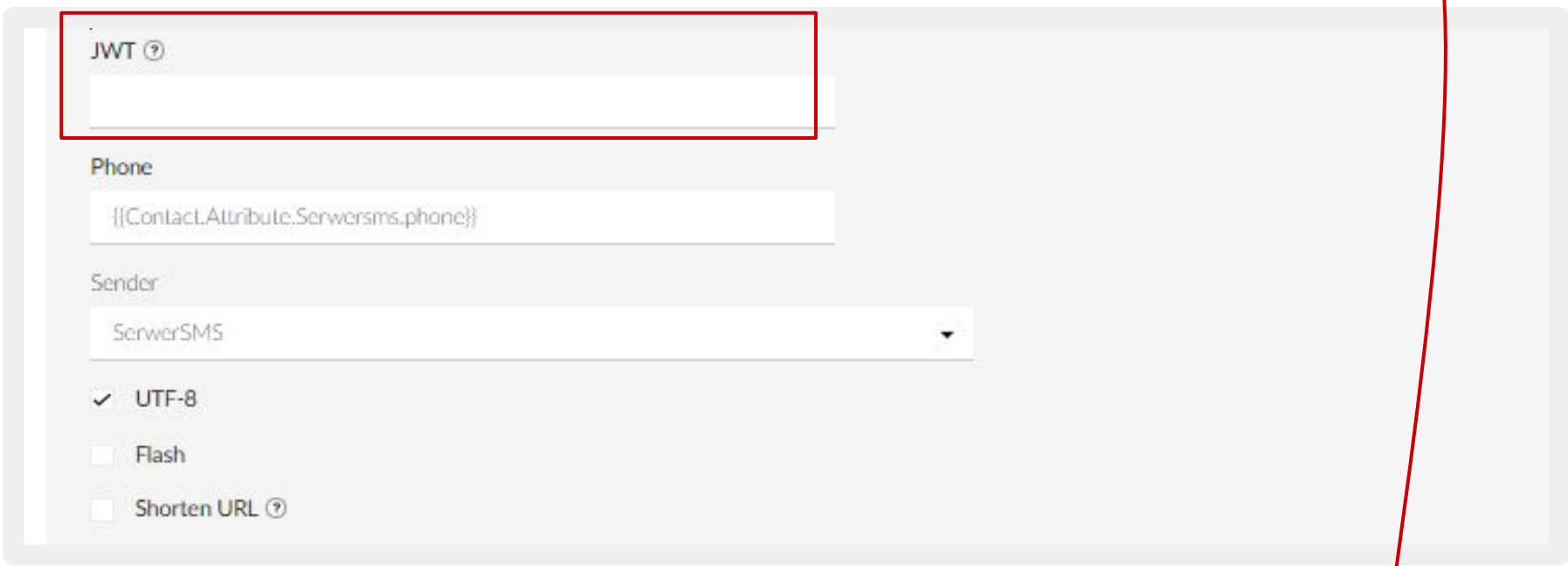
Go to "installed packages" and click NEW. Create a package by naming it with your own brand name, for example.



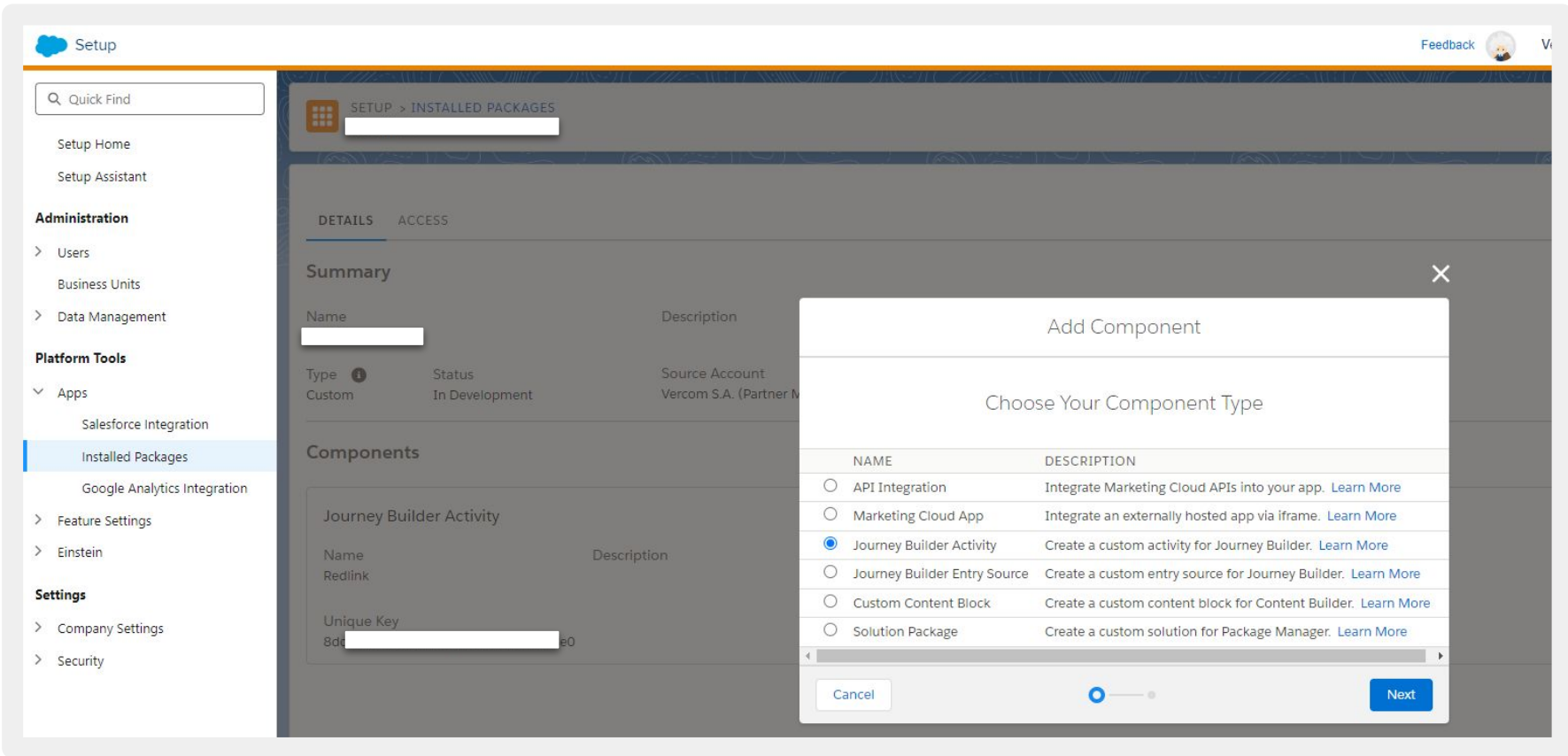
Copy the generated code and return to step 2 → Salesforce Settings. Go to Platform Tools → Installed Packages.



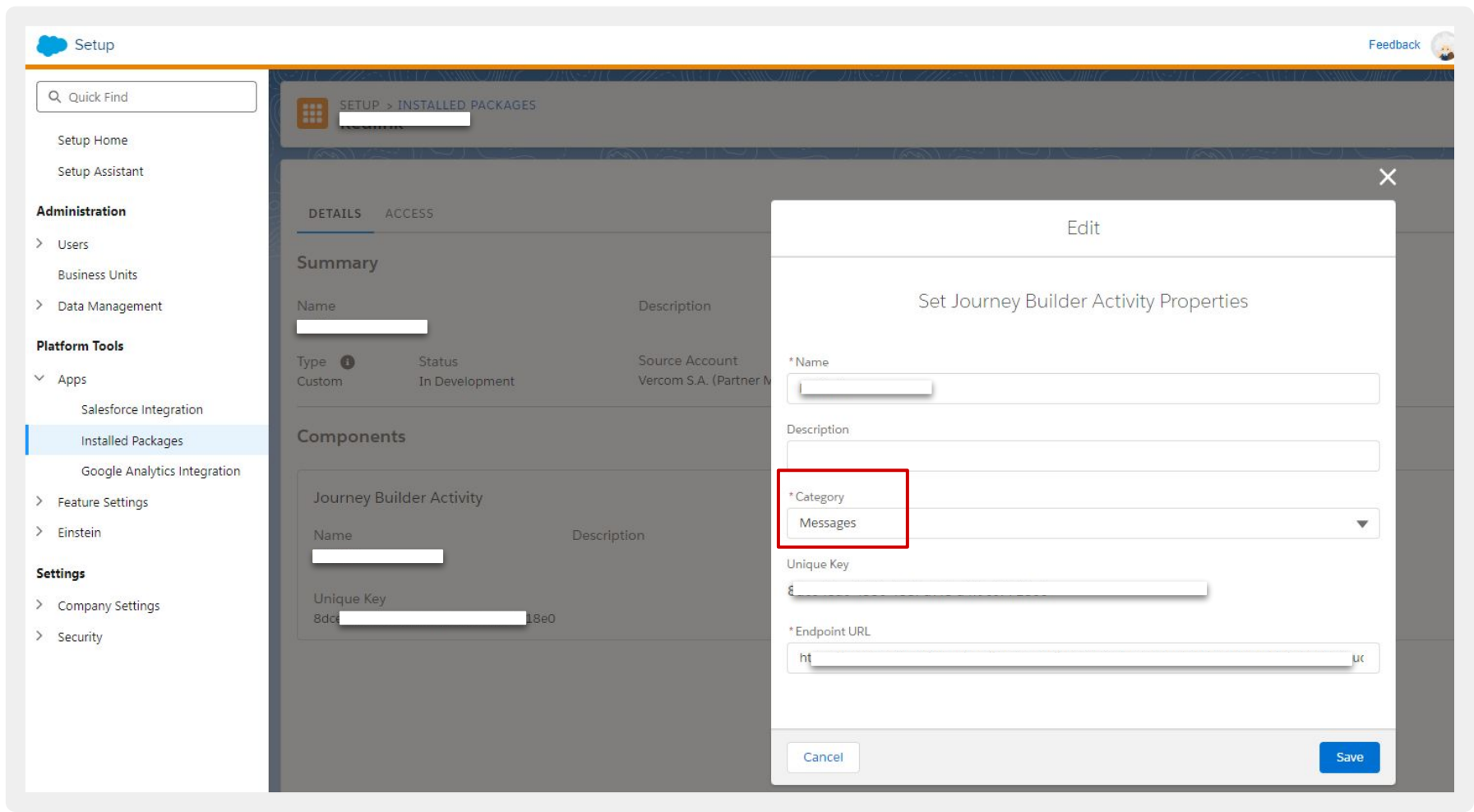
Enter the code in the designated place and save the settings.



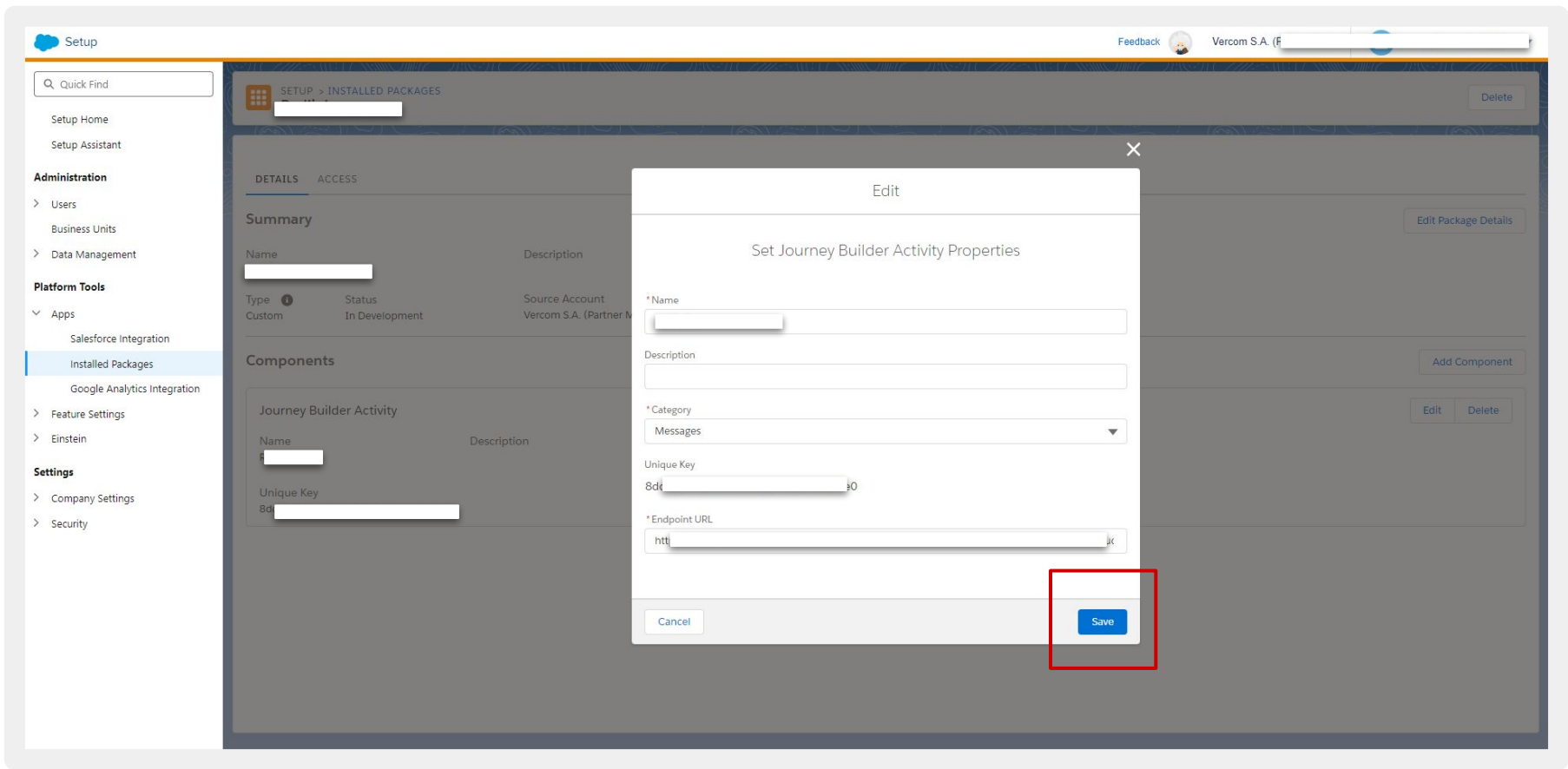
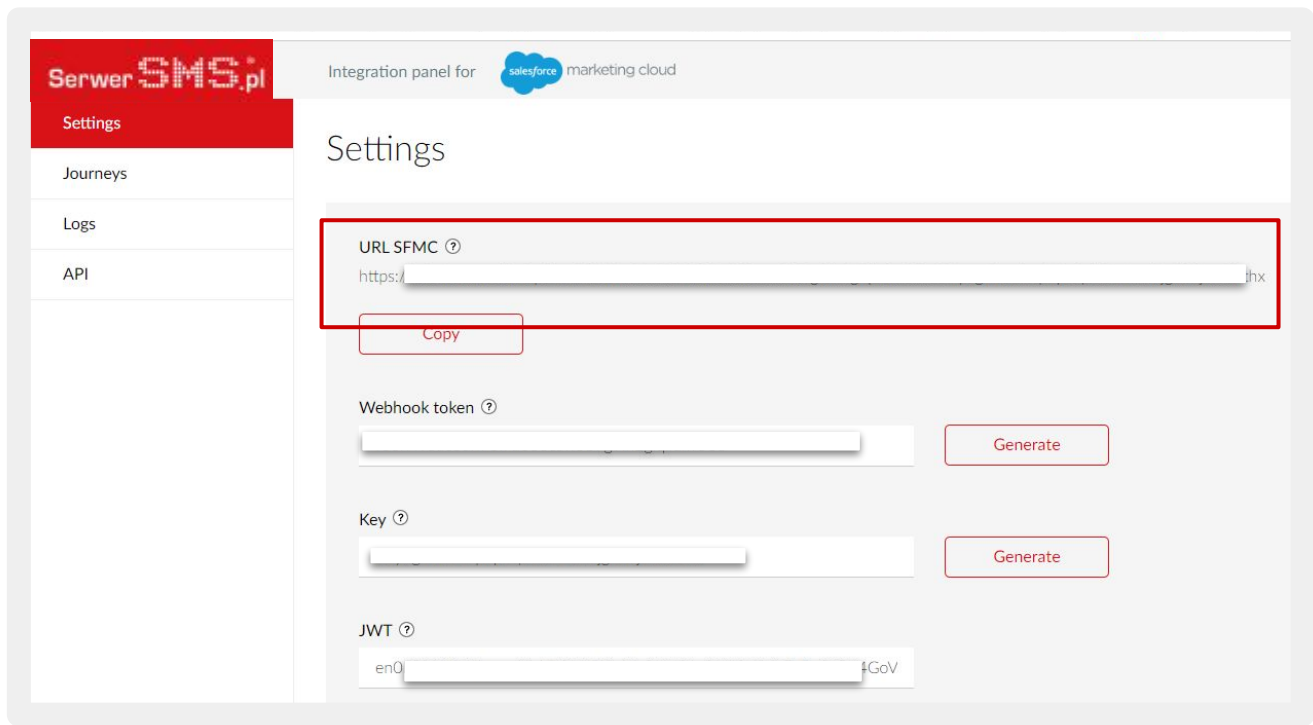
The component you need is "Journey Builder Activity". For your package, create a component.



Select the category in which the component will appear. In the case of SMS, it will be "Messages" - as in the graphic below. Also select the name.

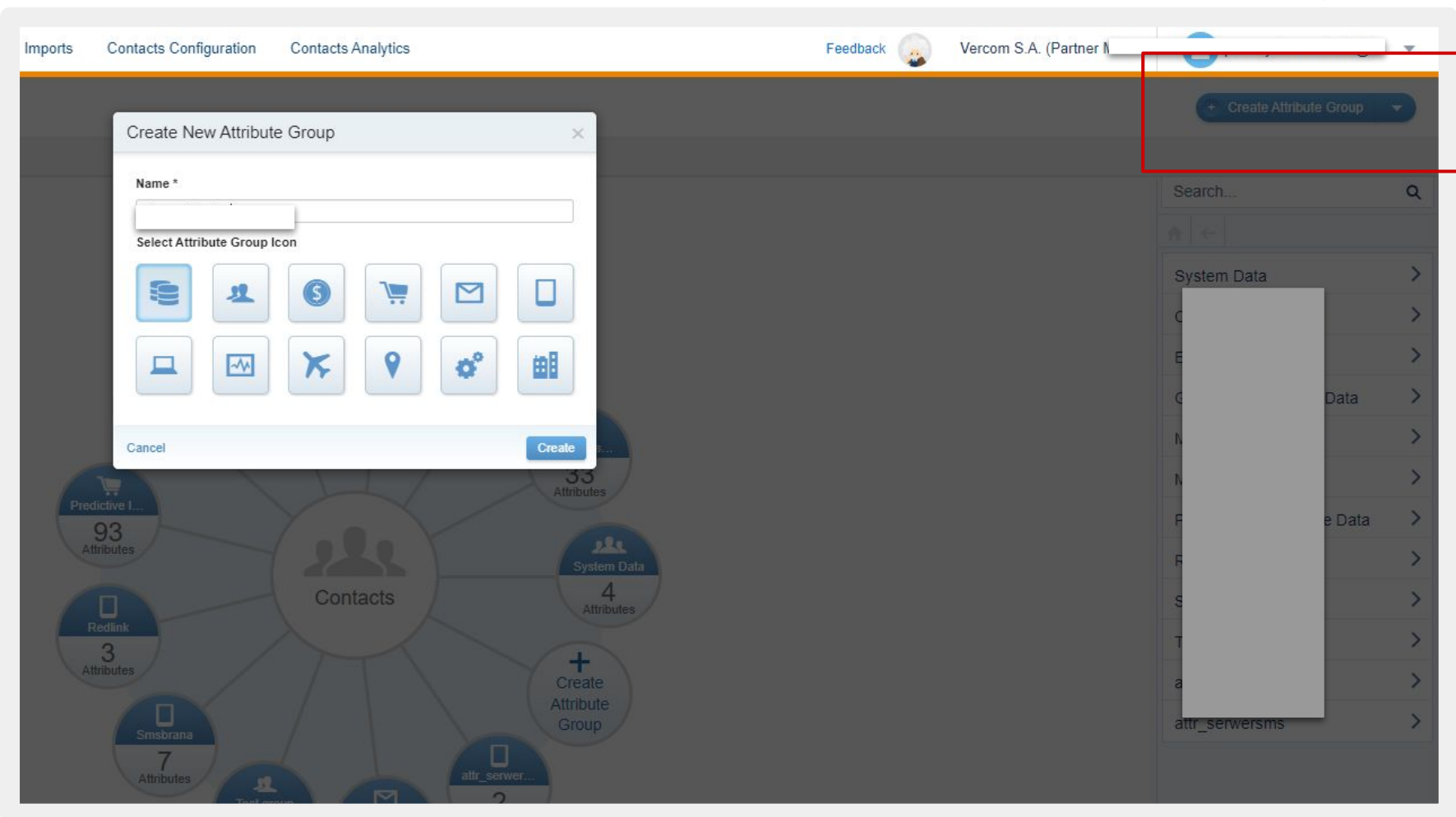
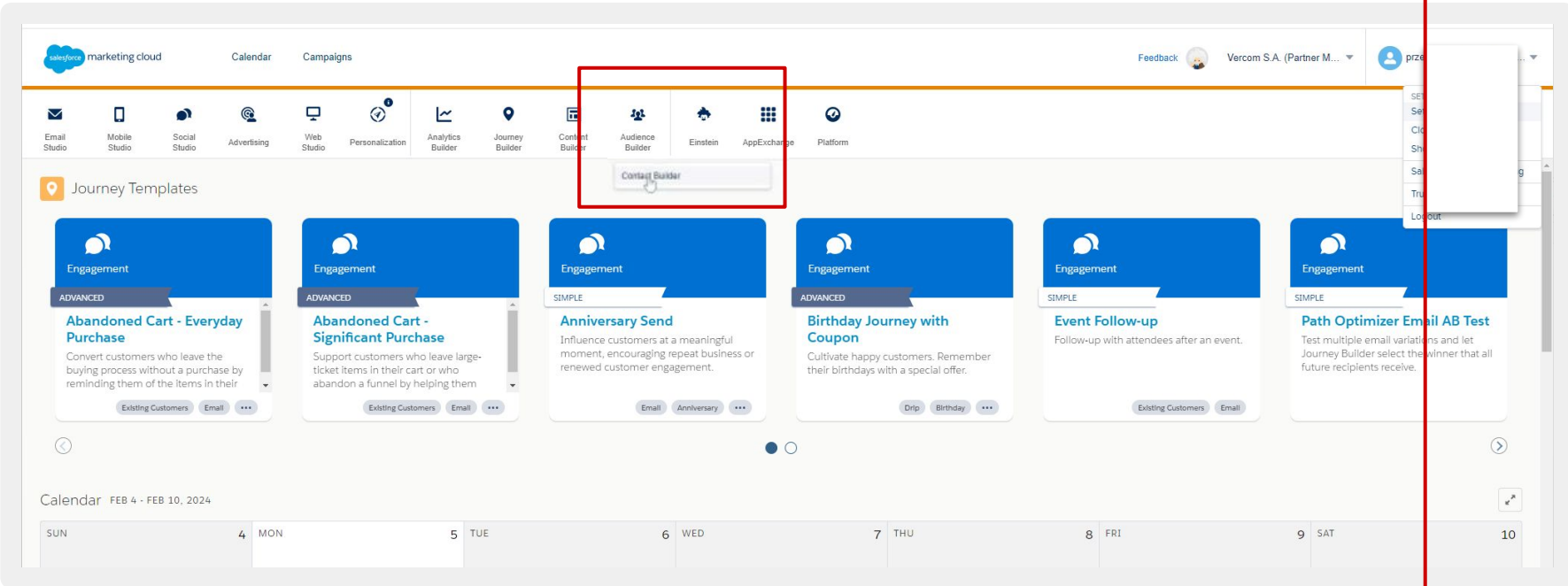


Copy the URL for SFMC that was previously generated.

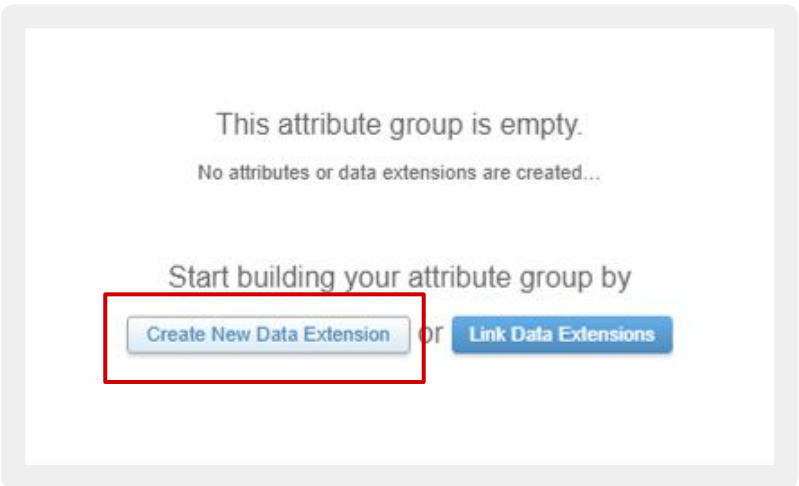
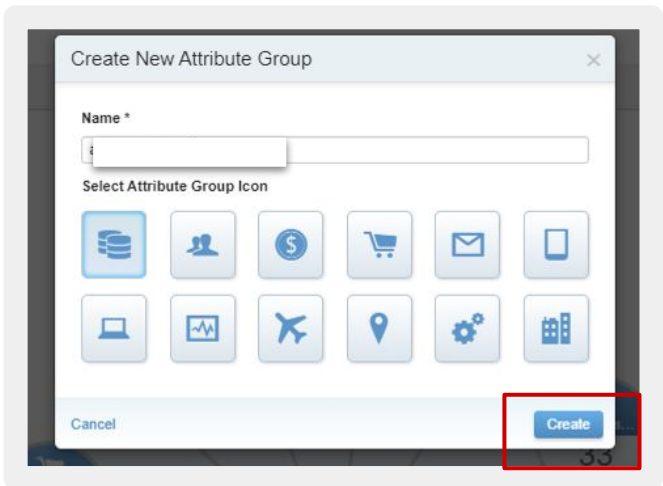


Creating a journey

The necessary data is to create a journey. In the next step, select "Contact Builder" to create attributes.



Select "Create New Extension." See graphic number 2.



Create a name and proceed to the next step by selecting "Next". Remember to check the "Is Sendable" checkbox.

The screenshot shows the 'Create New Data Extension' dialog box with the 'Properties' tab selected. The 'Name' field is empty and highlighted with a red rectangle. The 'Is Sendable?' checkbox is checked and highlighted with a red rectangle and an arrow. The 'Next' button is highlighted with a red rectangle.

Importing contacts

Importing contacts is done in two ways. With a large number of contacts, you will do it with a csv file. For a smaller number of data, you can add them manually.

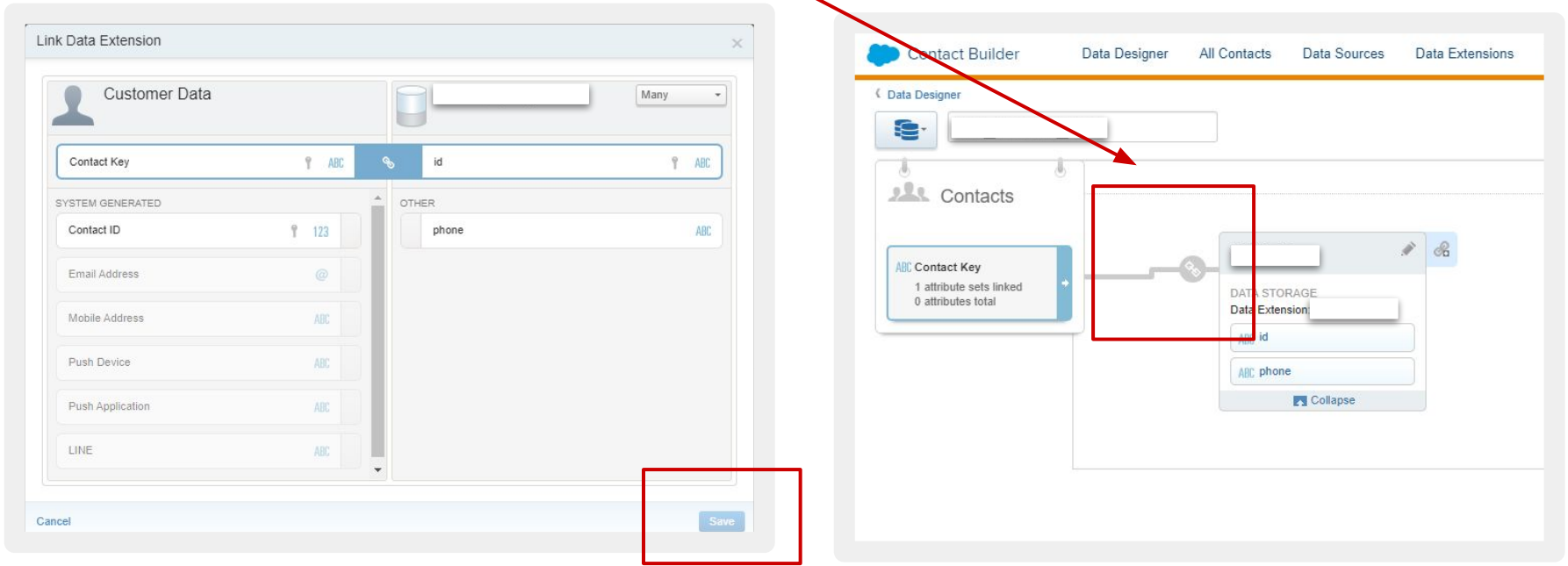
The screenshot shows the 'Create New Data Extension' dialog box with the 'Attributes' tab selected. The table below shows the attributes defined for the data extension.

Primary Key	Name	Data Type	Data Sources	Required	Length	Default Value
☒	id	Text	Unassigned	☒	50	
☐	phone	Text	Unassigned	☐	50	
☐		Text	Unassigned	☐	50	

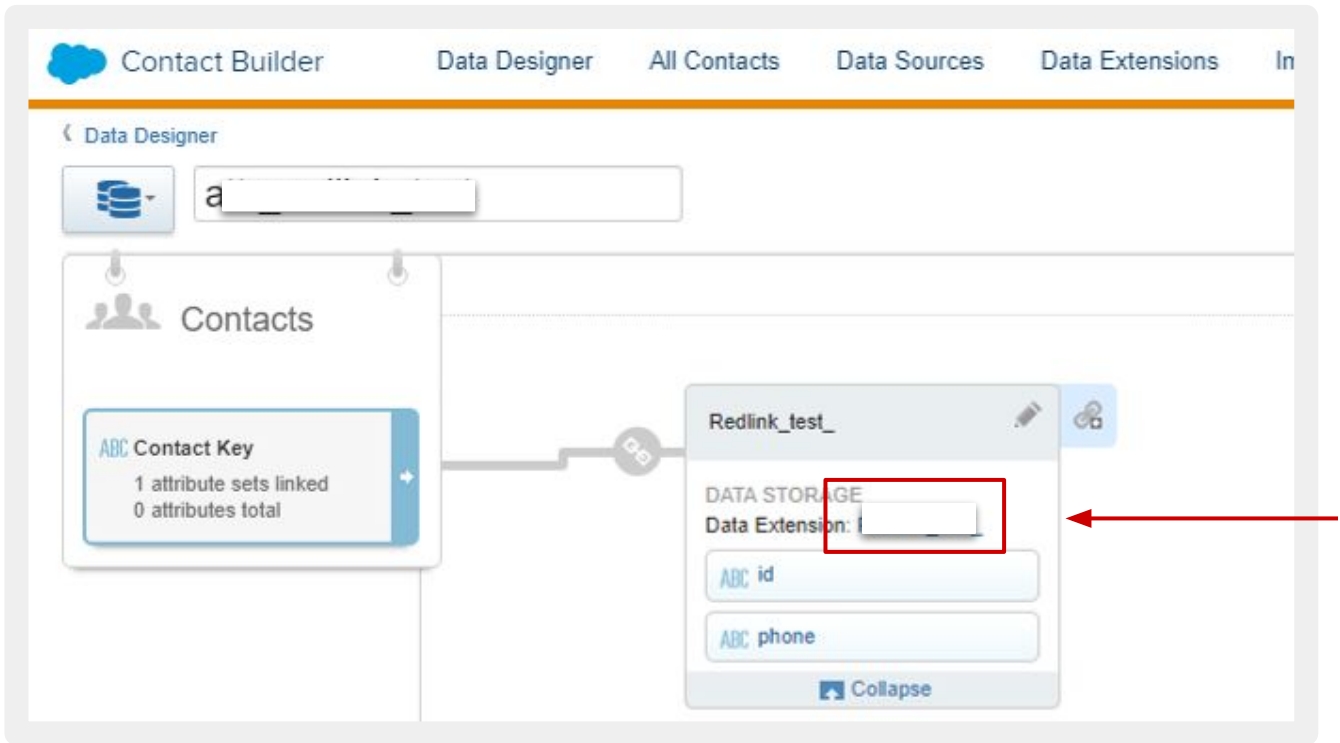
Map data between an extension and existing data in Salesforce. Find the key to connect the two tables. The mark in the red rectangle indicates the correct data mapping.

The two screenshots show the 'Link Data Extension' dialog box. The left screenshot shows the 'Customer Data' table with 'Contact ID' as the primary key. The right screenshot shows the 'Customer Data' table with 'Contact Key' as the primary key, and a red rectangle highlights the mapping between 'Contact Key' and 'id'.

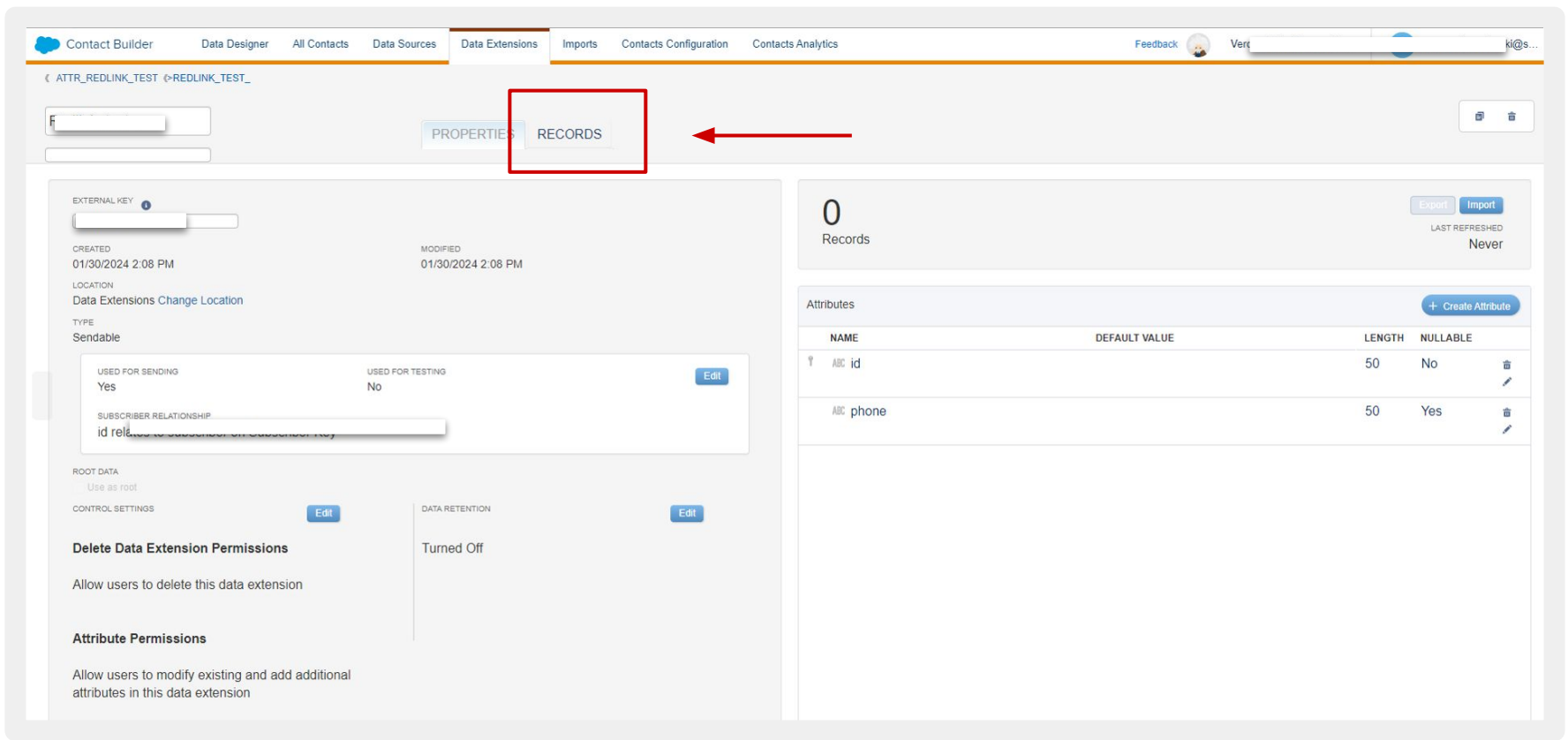
When you select the button marked with a red rectangle, you will go to the place shown in the graphic number 2. If you see such a sign, then the data has been correctly merged.



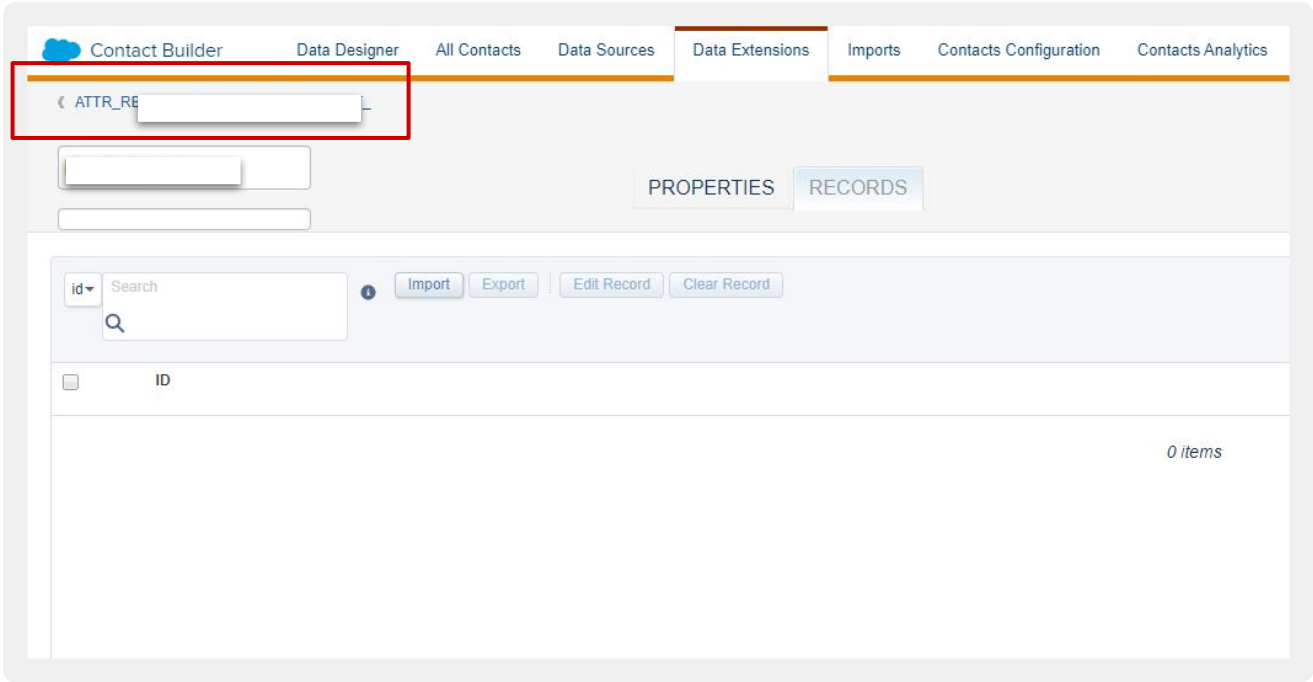
The next step is to add data. To add them, select the highlighted button.



Adding data can be done by importing csv or by manually adding records. See the button marked with a red rectangle. If adding records manually, select "Records".

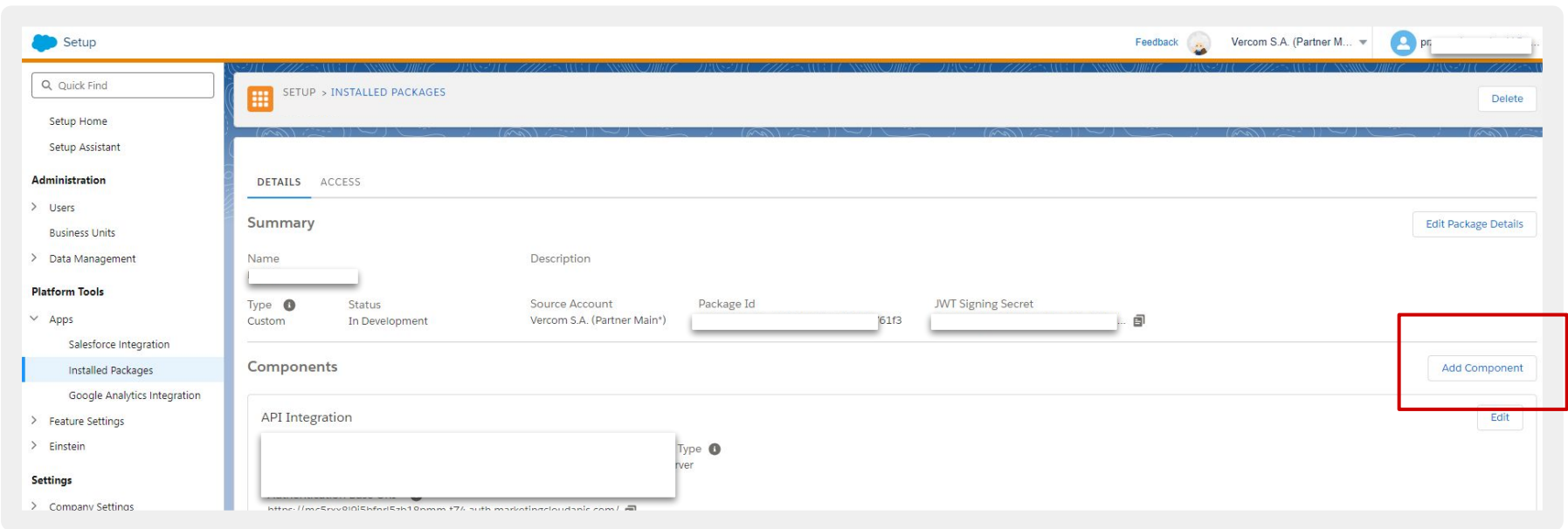


The manual addition of data is shown below. After clicking on "Records" you will go to the tab shown in this graphic. Now return to the trip creation area by selecting the highlighted button.

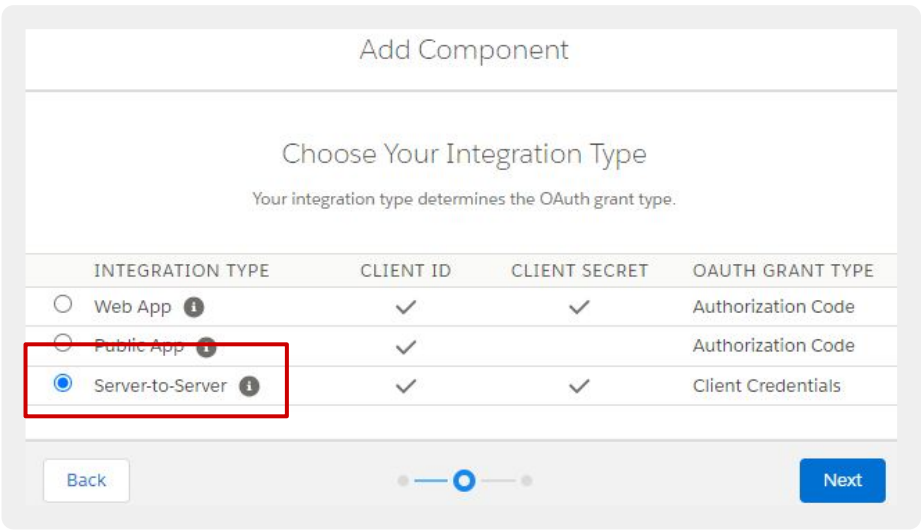
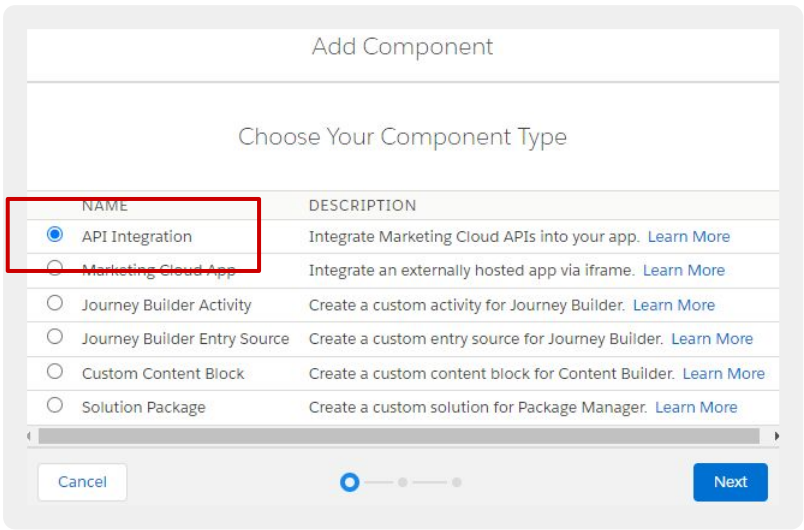


Reports and additional parameters

ClientID, ClientSecret, Base auth URL parameters are needed for reports. To generate them, click "Add Component". Then go through step 1,2 and 3.



Then go through step 1,2, and 3. Select "Integration" API, "Server-to-Server" API, and the last step "Data Extension" by checking Read and Write on the DATA tab and Read on the Automation tab.



Add Component

☐ Delete

DATA

Data Extensions ☒ Read ☐ Write

File Locations ☐ Read ☐ Write

Tracking Events ☐ Read ☐ Write

DATA ENCRYPTION

Manage Keys ☐ View

Status/Logs ☐ Rotate ☐ Revoke

DATA FACTORY UTILITY

Access ☐ Configure

EVENT NOTIFICATIONS

Callbacks ☐ Create ☐ Read ☐ Update ☐ Delete

Subscriptions ☐ Create ☐ Read ☐ Update ☐ Delete

HUB

Approvals ☐ Read ☐ Write

Calendar ☐ Read ☐ Write

Campaign ☐ Read ☐ Write

Tags ☐ Read ☐ Write

Workflows ☐ Read ☐ Write

Back Save

Documents and Images ☐ Read ☐ Write

Saved Content ☐ Read ☐ Write

AUTOMATION

Automations ☐ Read ☐ Write ☐ Execute

Journeys ☒ Read ☐ Write

Activate/Stop/Pause/Resume/Send/Schedule ☐ Delete

CONTACTS

Audiences ☐ Read ☐ Write

Contact to Business Unit Mapping ☐ Create ☐ View

List and Subscribers ☐ Read ☐ Write

Cancel Save

In the previous step, the parameters were generated, which will appear in the Components tab. Transcribe the parameters ClientID, ClientSecret, Base auth URL to the ServerSMS proxy panel. The Client Secret parameter has a 180-day Time-To-Live (TTL) from the moment it is generated. For currently existing Client Secrets, the validity period expires on September 30, 2026. Once the parameter expires, you must regenerate a new Client Secret in the Salesforce panel and then paste it into the intermediary panel at salesforce.serversms.pl/panel. This action must be repeated every 180 days.

Quick Find

Setup Home

Setup Assistant

Administration

> Users

Business Units

> Data Management

Platform Tools

> Apps

Salesforce Integration

Installed Packages

Google Analytics Integration

> Feature Settings

> Einstein

Settings

> Company Settings

> Security

SETUP > INSTALLED PACKAGES

Redlink

DETAILS **ACCESS**

Name: Redlink

Description:

Type: Custom

Status: In Development

Source Account: Vercom S.A. (Partner Main*)

Package Id: 4867a0cb-fdac-46fa-9328-c31a076761f3

JWT Signing Secret: YOQ9CRHgDY130Zf7eJaPazIVnU6brJ...

Components

API:

Client ID:

Client Secret:

Auth URL:

REST Base URI: https://mc5rxx8l9j5bfni5zb18pmm-t74.rest.marketingcloudapis.com/

SOAP Base URI: https://mc5rxx8l9j5bfni5zb18pmm-t74.soap.marketingcloudapis.com/

Scope:

Access: Data Extensions

Offline Access: Read, Write

ClientID ?

in

ClientSecret ?

Sl

Base auth URL ?

ht

Save

Delivery reports

To receive delivery report information, copy the URL from the intermediary panel at salesforce.serwersms.pl/panel and paste it into the appropriate location in the SerwerSMS customer portal.

Copy the URL from the location indicated below.

URL SFMC ?

<https://salesforce.serwersms.pl/mc/ckzuvy2y17slofta2mdpnlc9g99e8yeeebpufukjw8k6/si20mga26bcu0z6yybhw9mph44nbc7b99pcw58z4ld>

Copy

Webhook token ?

Generate

Key ?

id

Generate

JWT ?

Phone

{{Contact.Attribute.Serwersms.phone}}

Sender

SerwerSMS

☒ UTF-8

☐ Flash

☐ Shorten URL ?

URL for DLR ?

Copy

ClientID ?

ClientSecret ?

Base auth URL ?

Save

Next, log in to the SerwerSMS customer portal. Go to Interface Settings → HTTP API → Settings → Delivery Reports. Select your preferred option (Individual report delivery to the specified URL/ Group report delivery to the specified URL) and paste the previously copied URL.

☆ Usługi dodatkowe

👤 Ustawienia wiadomości

⚙️ Ustawienia konta

📄 Faktury i płatności

API

Ustawienia interfejsów

Moduły i wtyczki

HTTP API

SMPP API

EMI/UCP

Email2SMS

SMS przez FTP

SQL API

Adresy Callback/Webhook

Logi HTTP API

Logi SMPP

⚙️

HTTP API

UstawieniaAutoryzacja IPUżytkownicy APITokeny API

Ogólne ustawienia dla HTTP API

Wersja komunikatów zwrotnych:

☒ Tekstowa (opisy tekstowe dla błędów i informacji)

☐ Numeryczna (kody błędów, szczegóły w [dokumentacji](#))

Użycie głównego loginu konta:

☐

Z uwagi na bezpieczeństwo, sugerujemy pozostawienie tej opcji WYŁĄCZONEJ a komunikację przez API realizować z użyciem dedykowanych [użytkowników API](#)

Raporty doręczenia

!

Zalecamy aby raporty doręczenia były wysyłane bezpośrednio na adres URL Klienta. Ustawienie to zmniejsza ilość niepotrzebnych odpytań systemu i przyczynia się do sprawnej i niezwłocznej aktualizacji raportów po stronie Klienta.

Metoda aktualizacji:

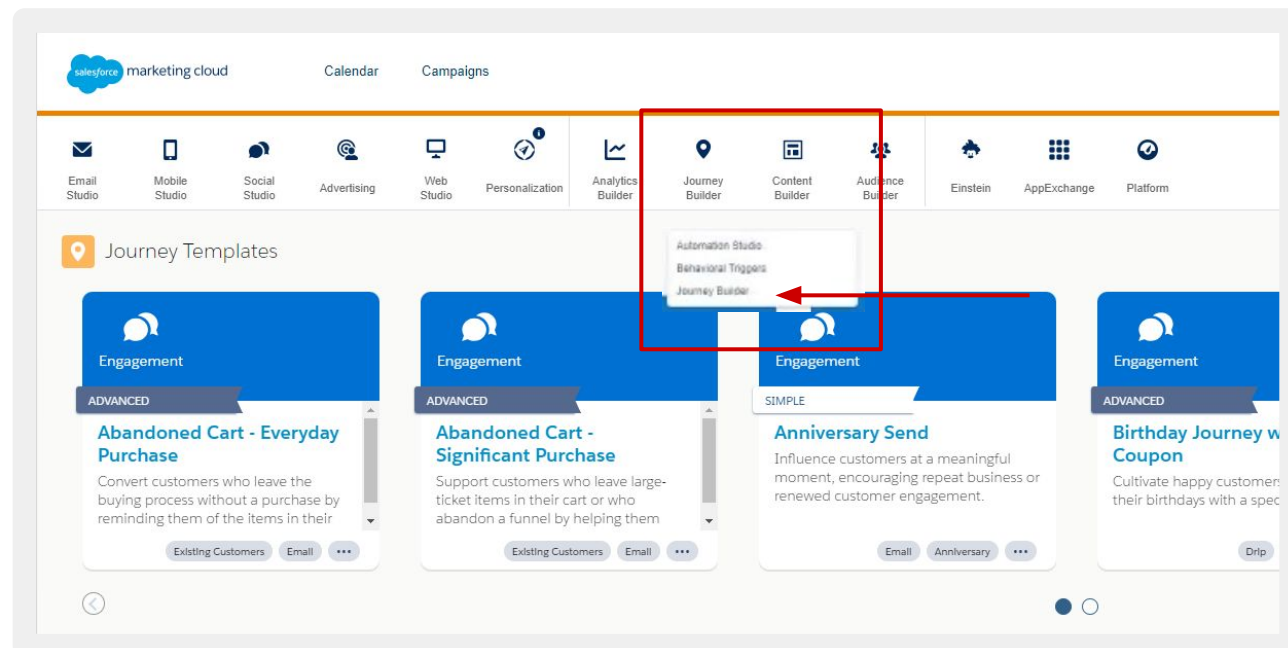
☐ Pojedyncze wysyłanie raportów pod wskazany adres URL

☒ Grupowe wysyłanie raportów pod wskazany adres URL

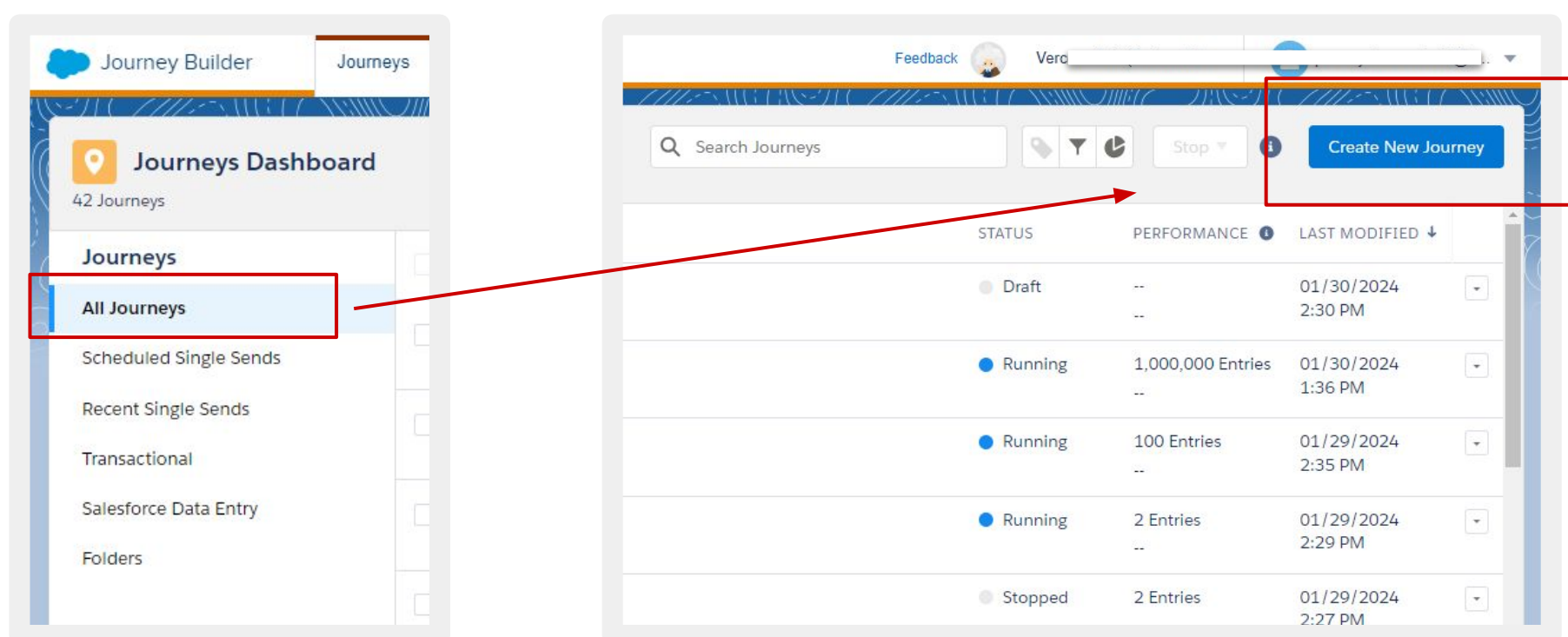
URL:

Journey Builder

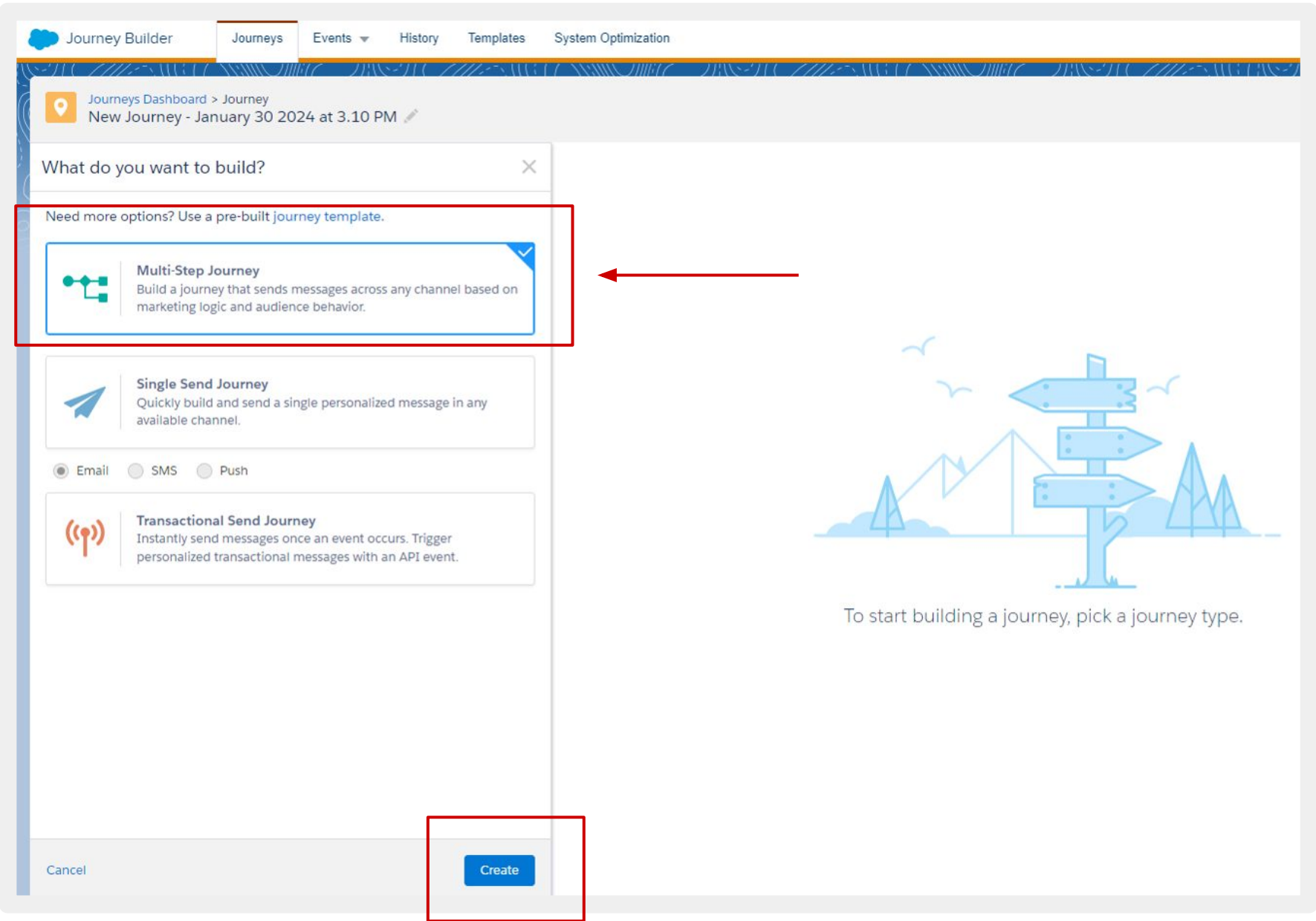
At this point you have everything to create a "new journey" (Journey Builder).



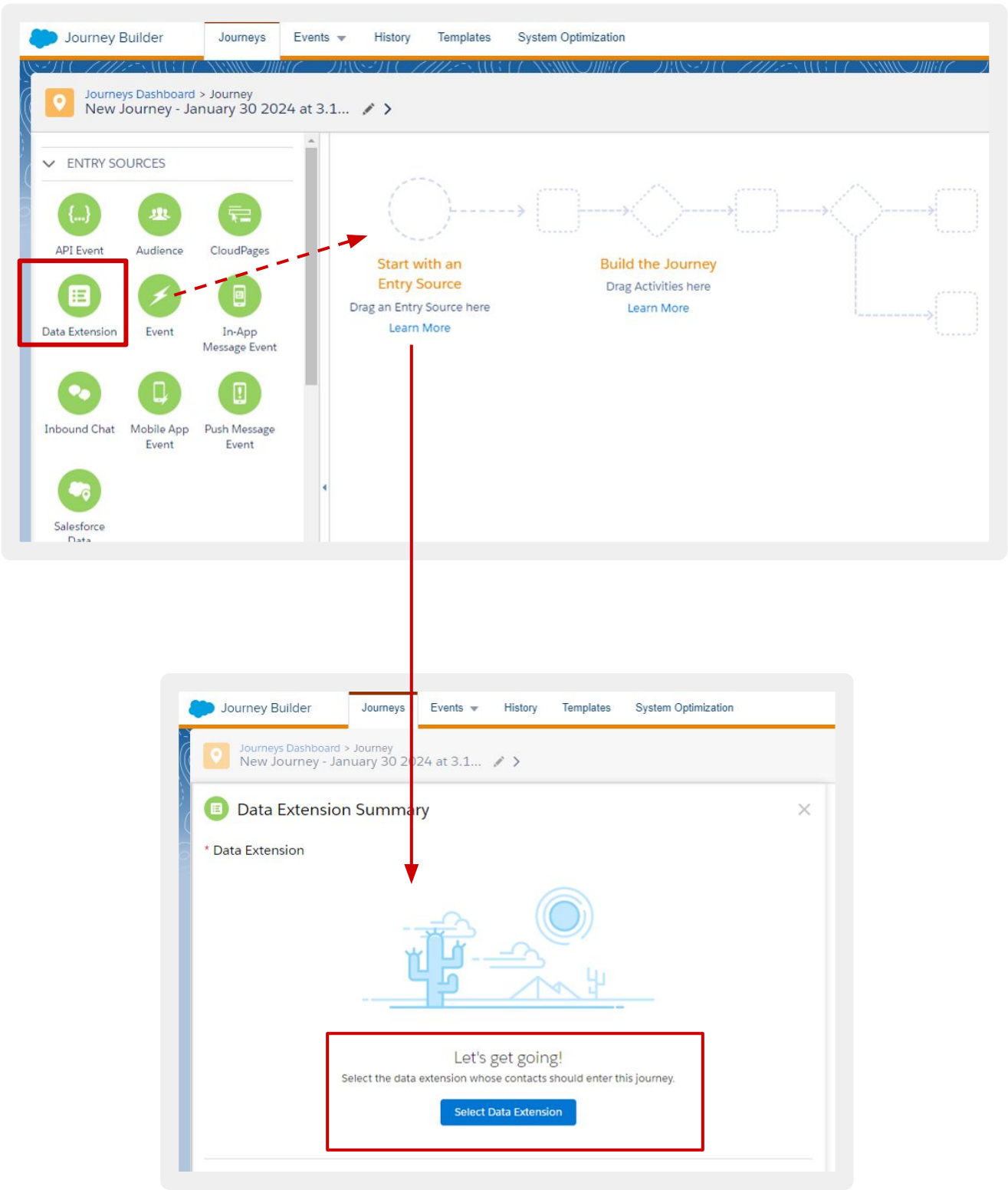
Select the "Create New Journey" button to create a new journey.



Select Multi step journey and press the "Create" button.

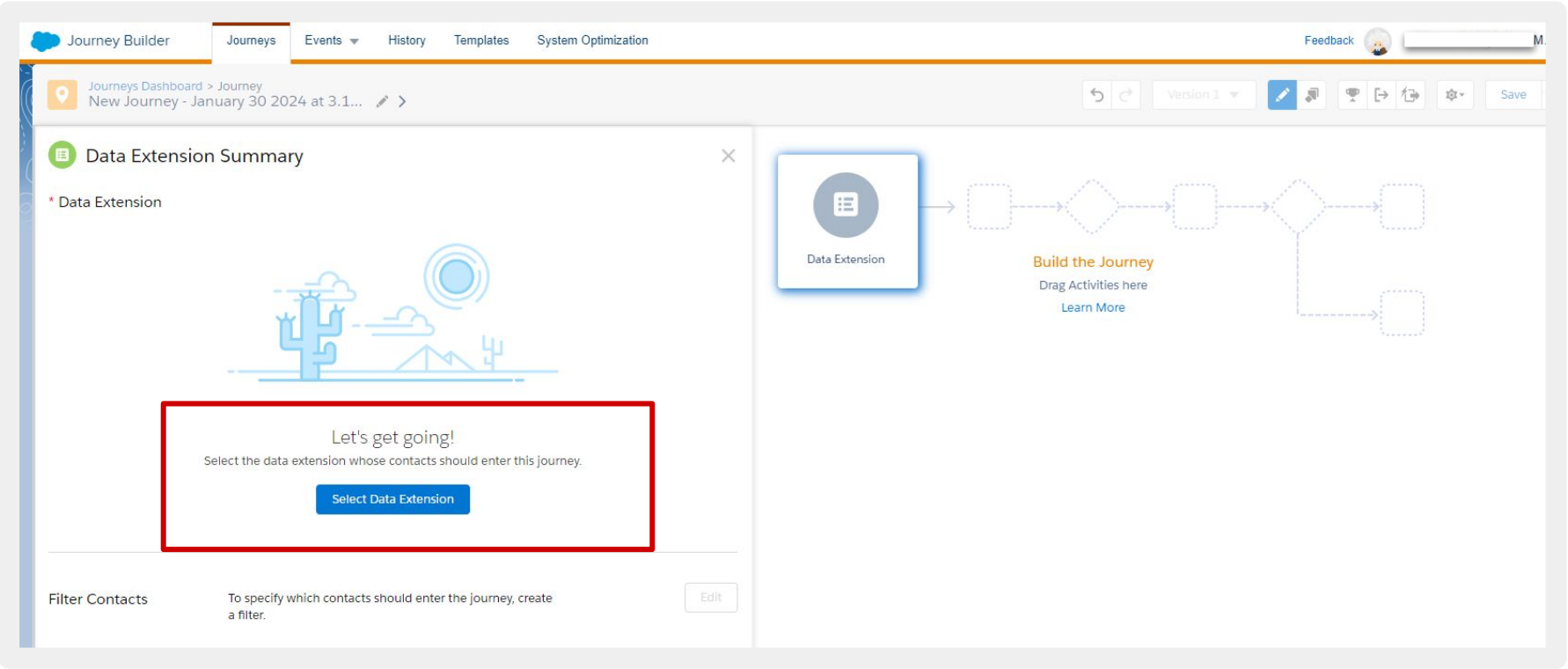


Now move on to creating scenarios starting with the extension data source.

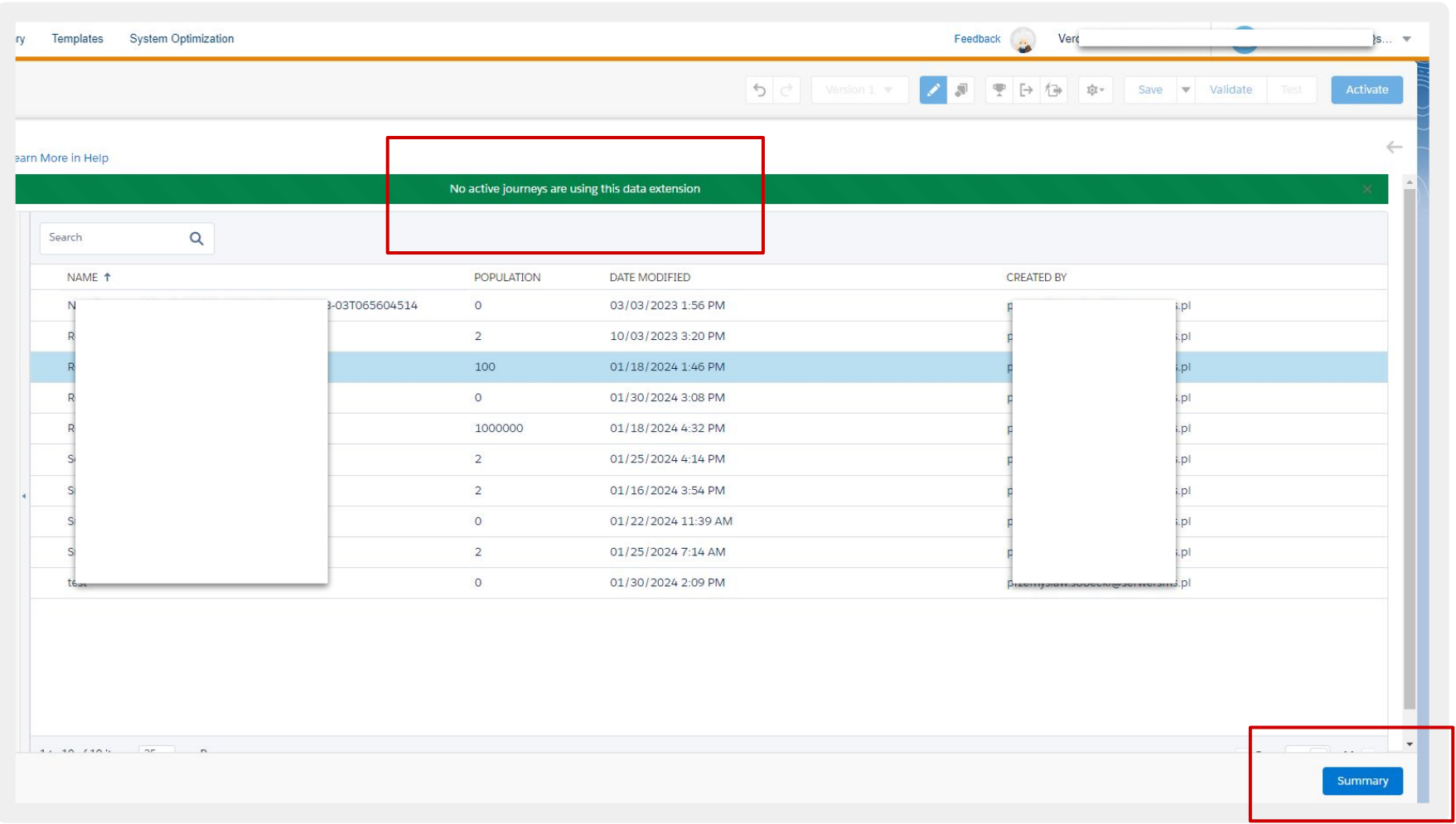


Creating scenarios

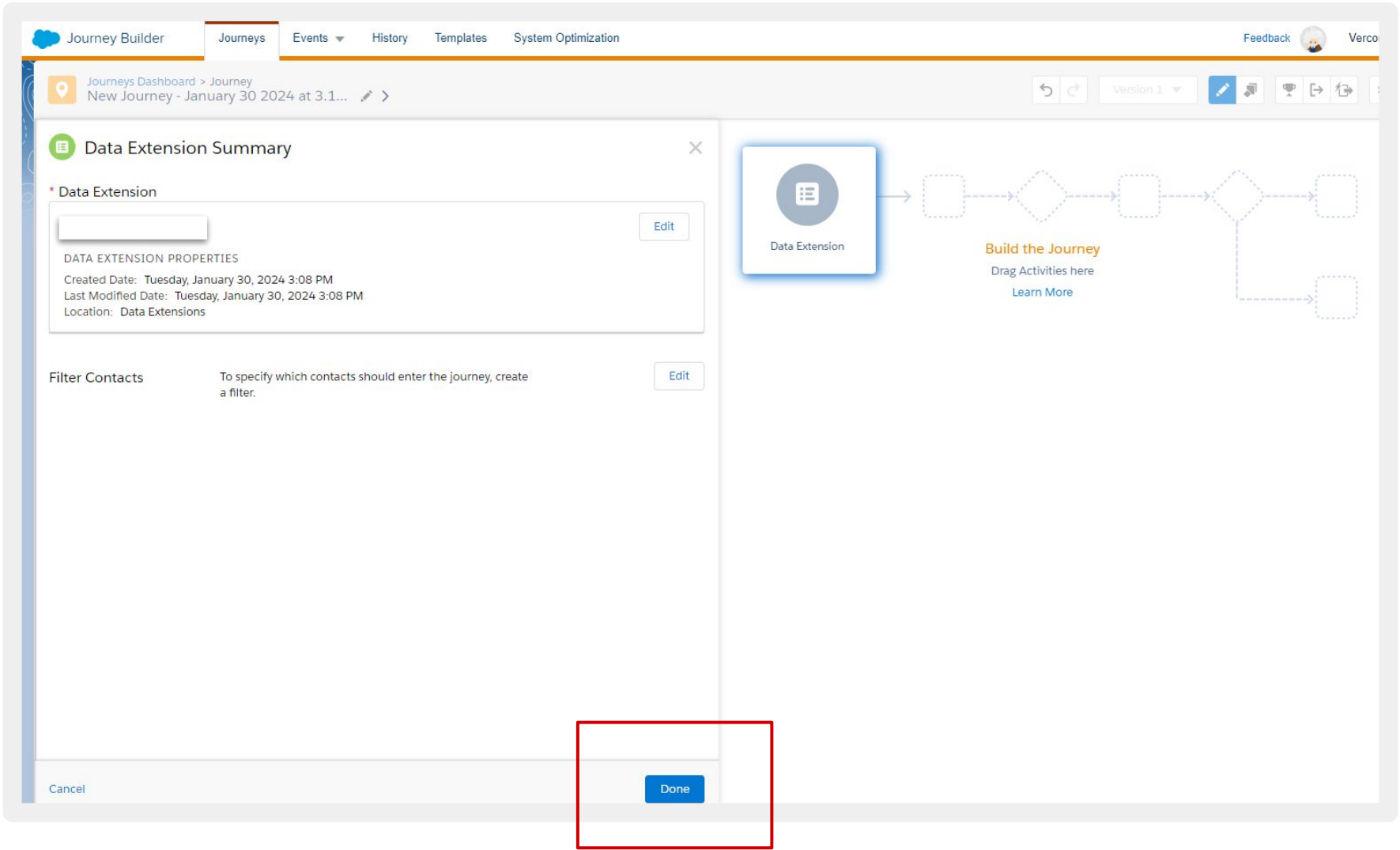
In the next step, select that extension (click Data extension) that was added in the path as the first step of the journey. Below you see the flow to create marketing automation.



After selecting "Select Data Extension" and choosing the name that was created earlier, a green background will appear. Which means that this data source is not used in any other trips. Keep in mind that you can only use one source at a time. Continue by selecting "Summary."

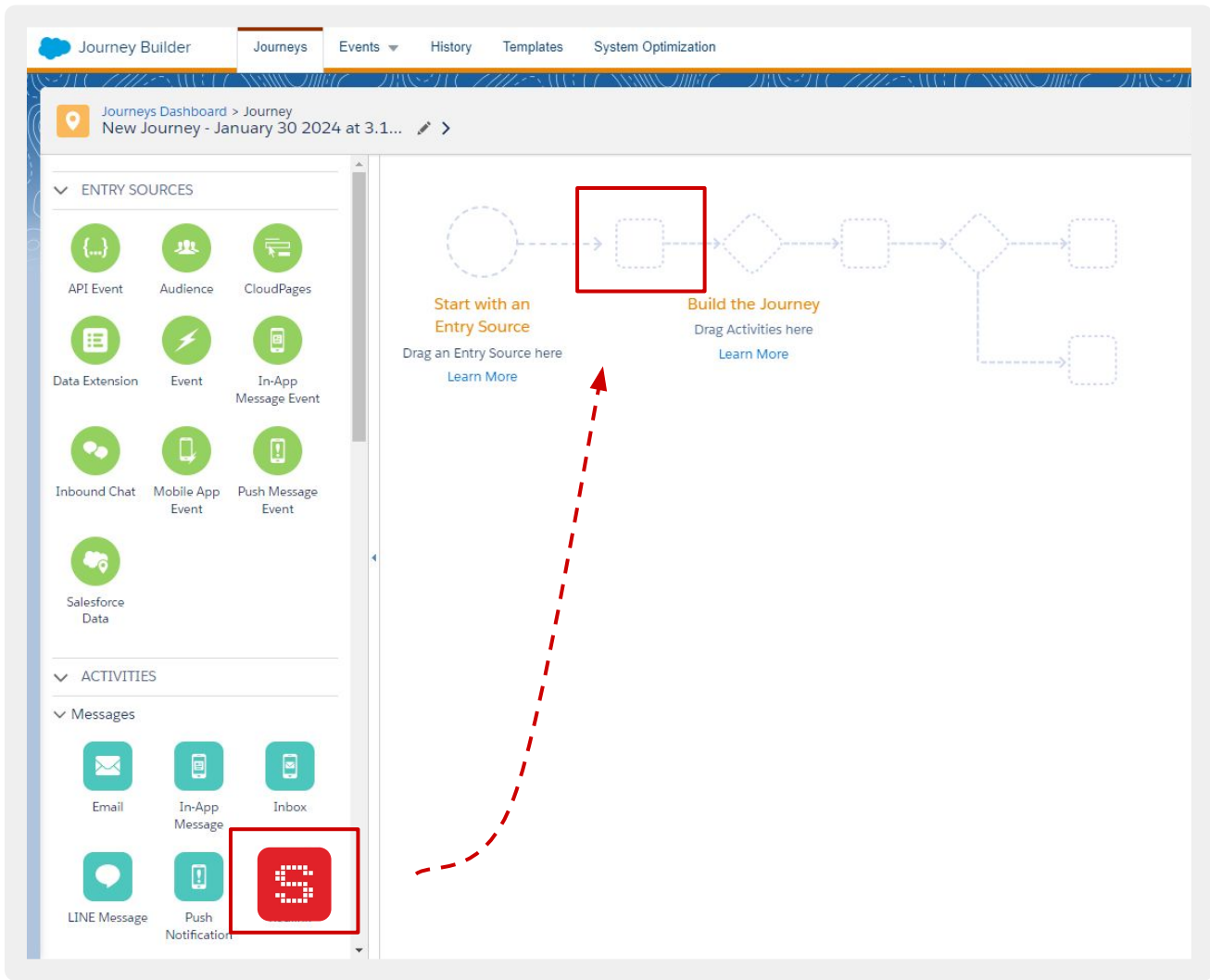


In the next step, select "summary" by going to the view below. Then you will notice the name of your brand. If everything matches, press "Done."



Creating integration

To test the integration, select a box with your brand logo and move it to a layout with lines and flow. Use "activity" for this. In our case, it's sending an SMS. After moving the branding window, click on it to move to the next step.



Plug-in configuration

Now we move on to the configuration of the plug-in. First, select the sender of the message (the sender's name in the SMS appearing instead of the number) labeled "Sender" and the message content "Message" to be sent.

The screenshot shows the 'SerwerSMS' configuration window in the 'Journey Builder' interface. The 'BASIC' tab is active, and the 'Send SMS' step is highlighted with a red box. A red arrow points to the 'Sender' dropdown menu, which is currently set to 'SMS TEST'. Below the 'Sender' field is the 'Message' text area. At the bottom, there are 'Personalization fields' and a 'Next' button.

In the next step, select the source from where the phone number will be taken. This is necessary because the system substitutes the value from our extension. It is also necessary to specify the delivery address of the report. See the DELIVERY designation under the brand logo.

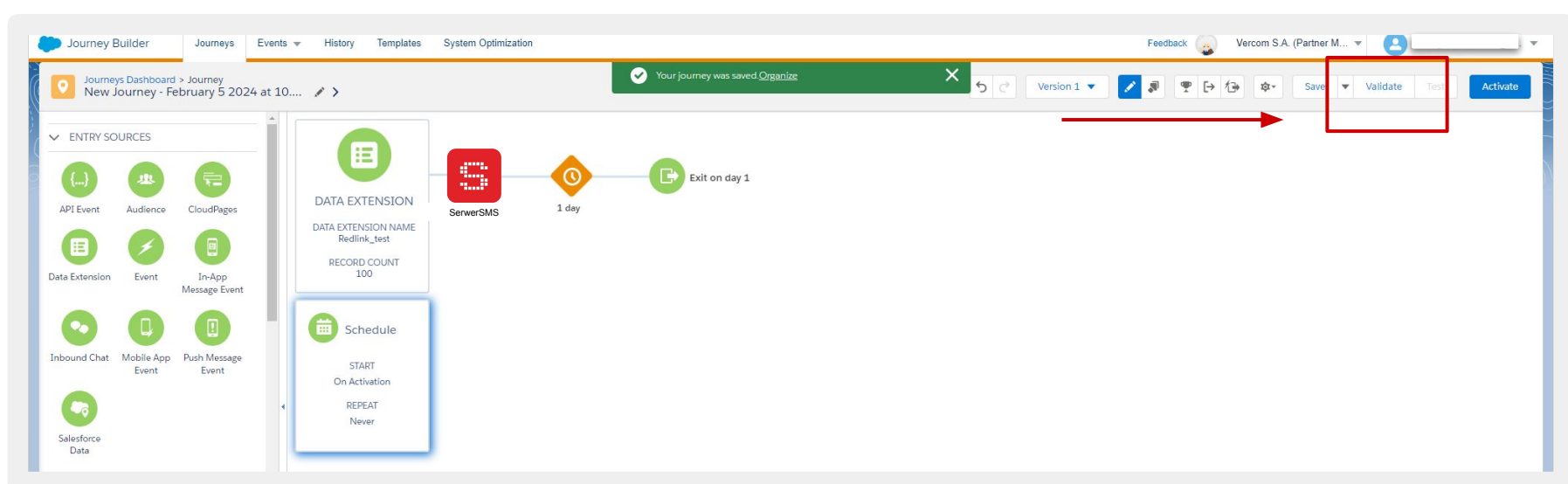
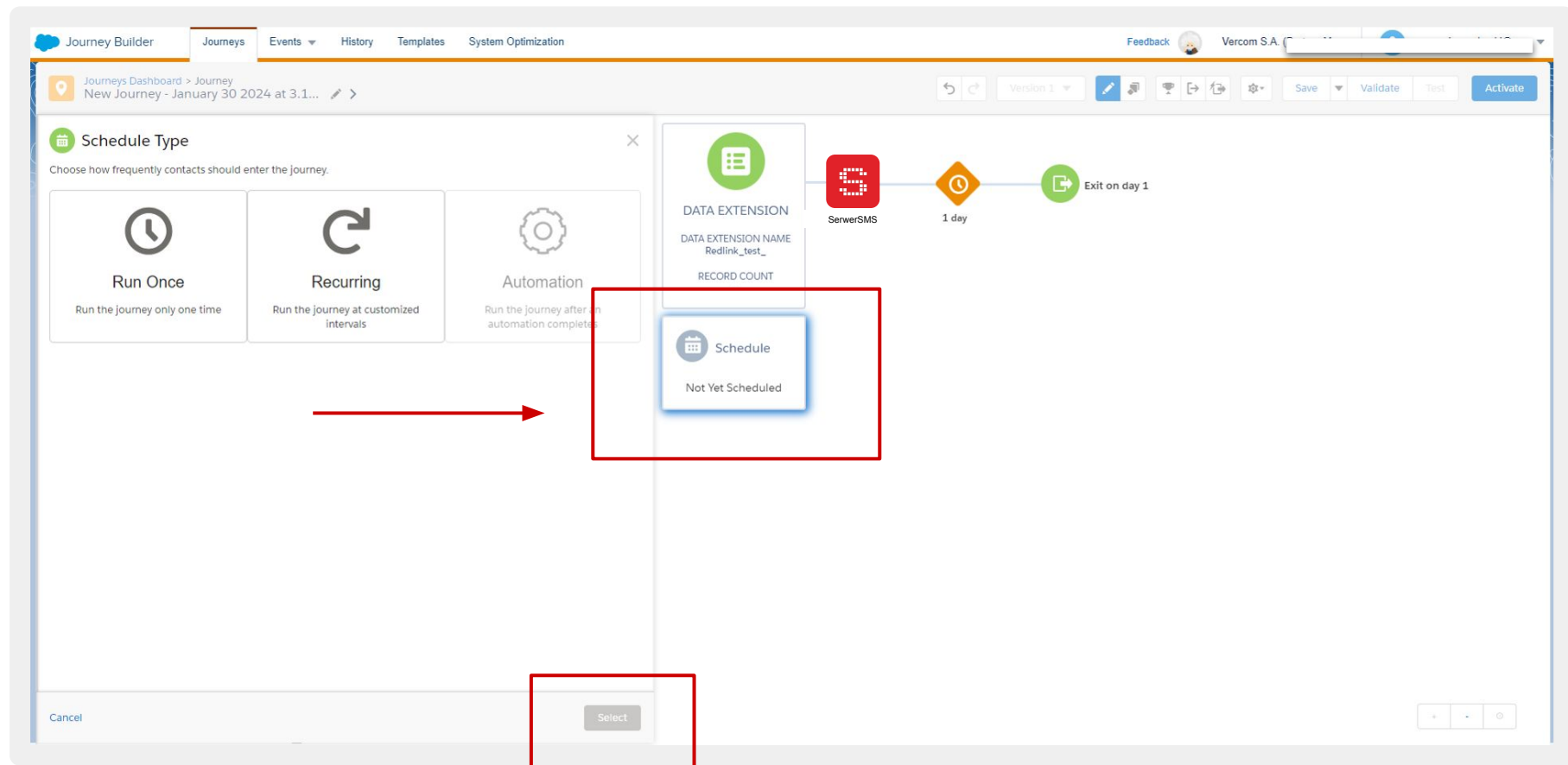
The screenshot shows the 'SerwerSMS' configuration window in the 'Journey Builder' interface. The 'PHONE' tab is active, and the 'Phone' field is highlighted with a red box. The field contains a placeholder text '[[Contact.Default.Phone]]'. The 'DELIVERY' tab is also visible, and the 'Send SMS' step is highlighted with a red box.

You select the next parameters when you want to shorten the link and use Flash messages. In the case of Flash, messages are not saved in the inbox (such a message appears as an instant message on the screen).

The screenshot shows the 'SerwerSMS' configuration window in the 'Journey Builder' interface. The 'DELIVERY' tab is active, and the 'Shorten URL' and 'Flash' options are highlighted with a red box. The 'Shorten URL' checkbox is checked, and the 'Flash' checkbox is unchecked.

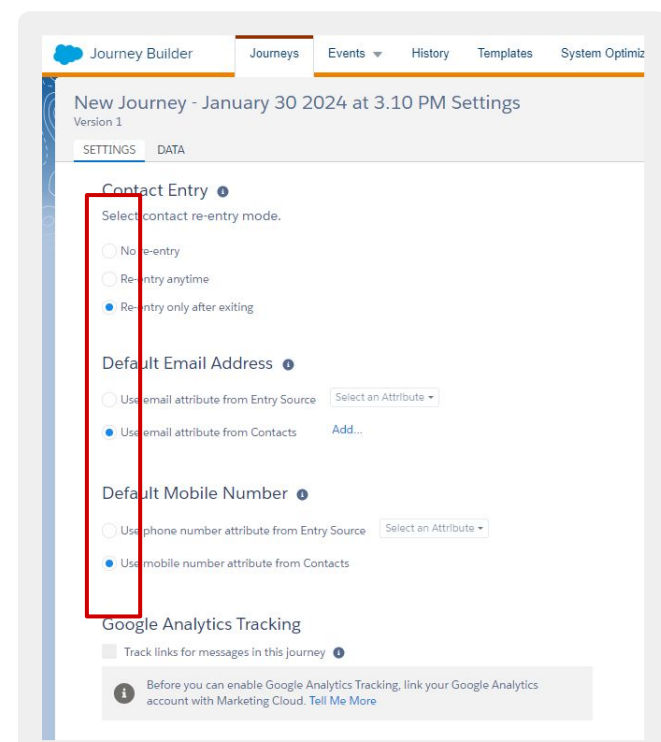
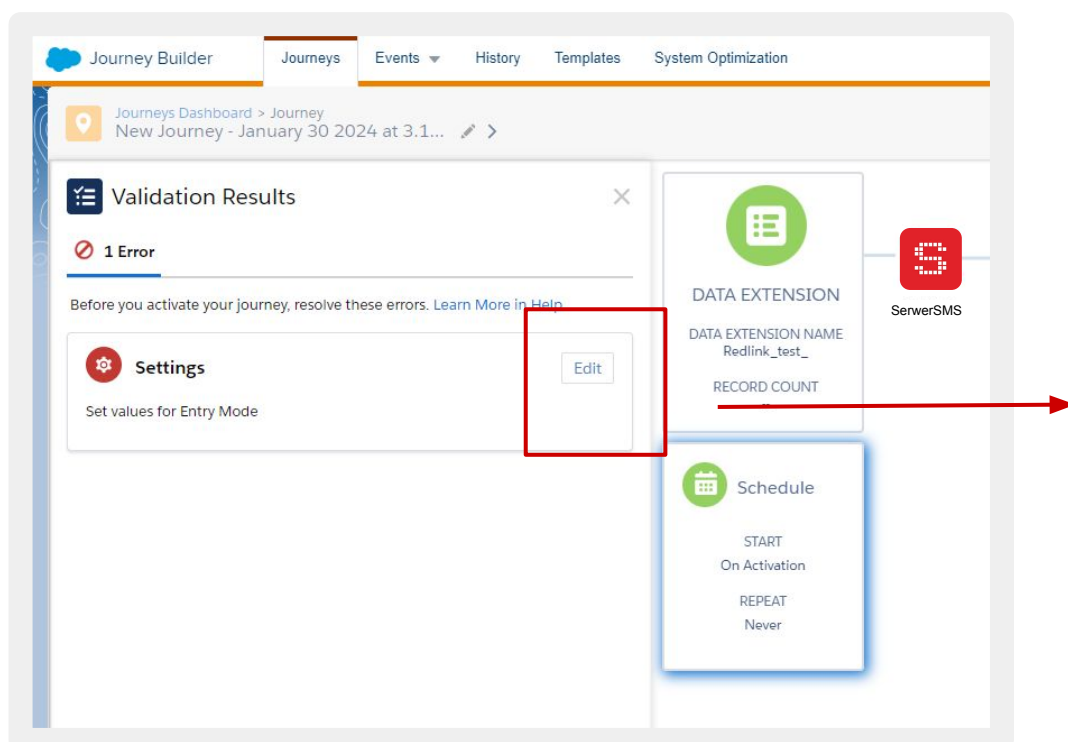
Setting a shipping date

Set a deadline for sending messages. Use the "Schedule" button for this. There are three options to choose from: 1. run once (one-time sending) 2. recurring/cyclical 3. automation. Once selected, save the settings.

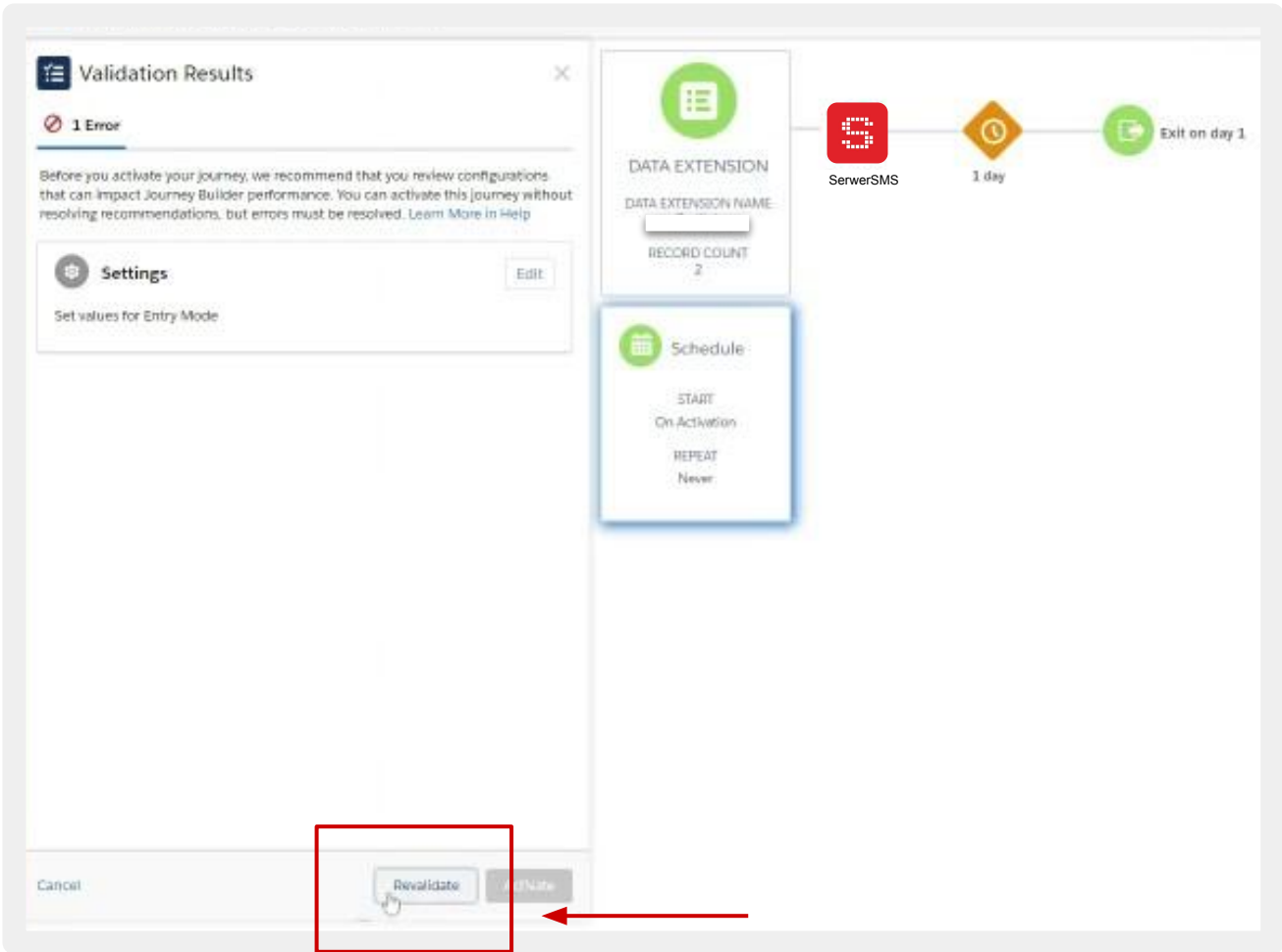
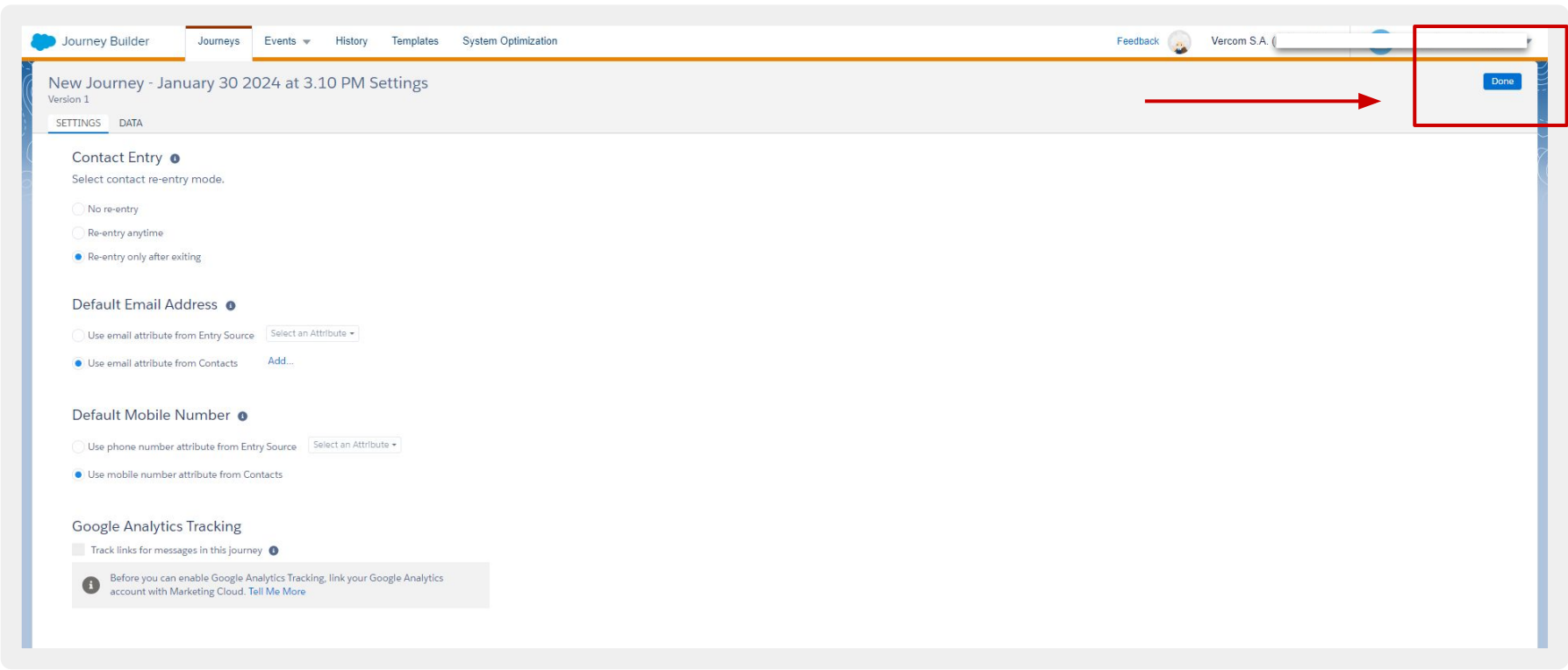


Note: remember to keep the check boxes checked, as in the graphic below (from the right):

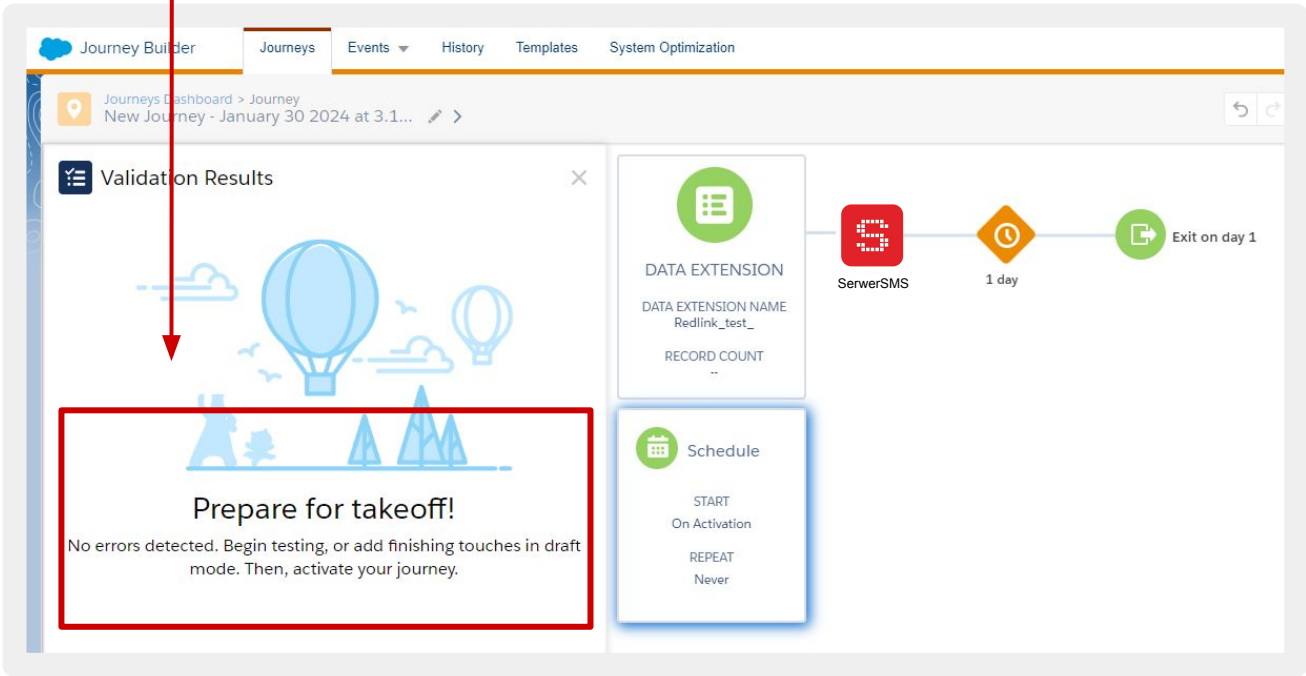
1. URL
2. email address
3. where the phone number will be taken from.



Re-validation is required. See graphics below.



"Prepare for takeoff" means so much that everything has been validated correctly. You can activate your trip!



Again log into the intermediary panel check the status of your campaign. In this case, we have a message that the campaign is not active.

Serwer SMS.pl

Integration panel for  marketing cloud

Settings

Journeys

Logs

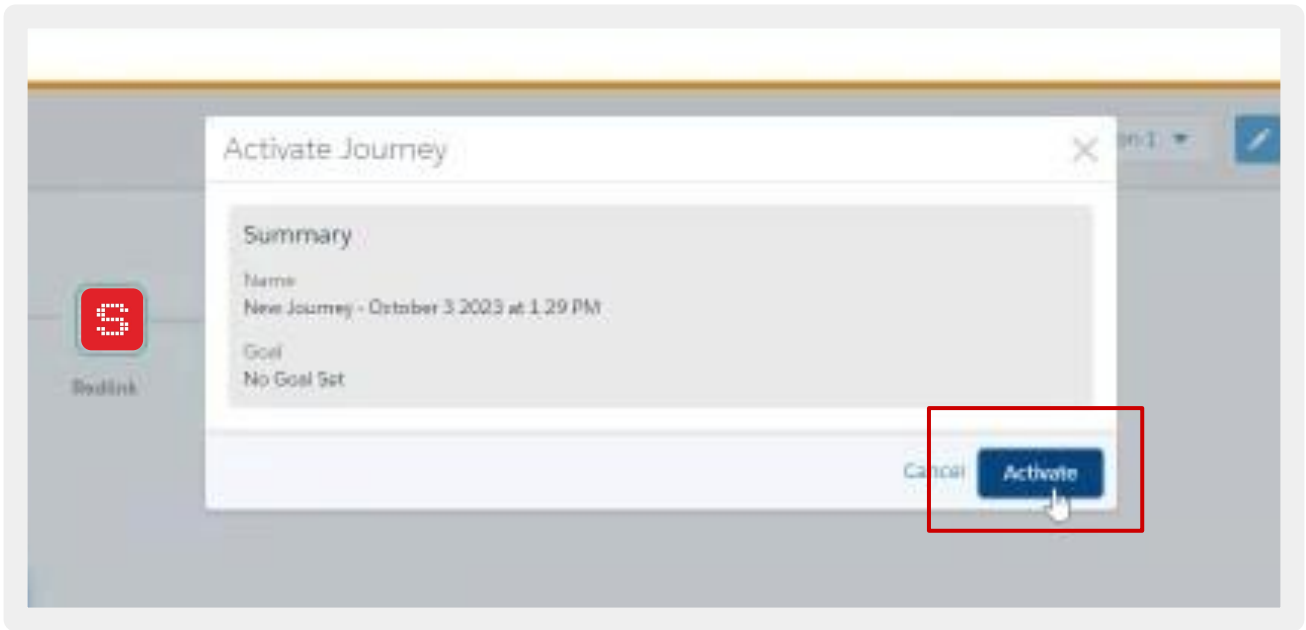
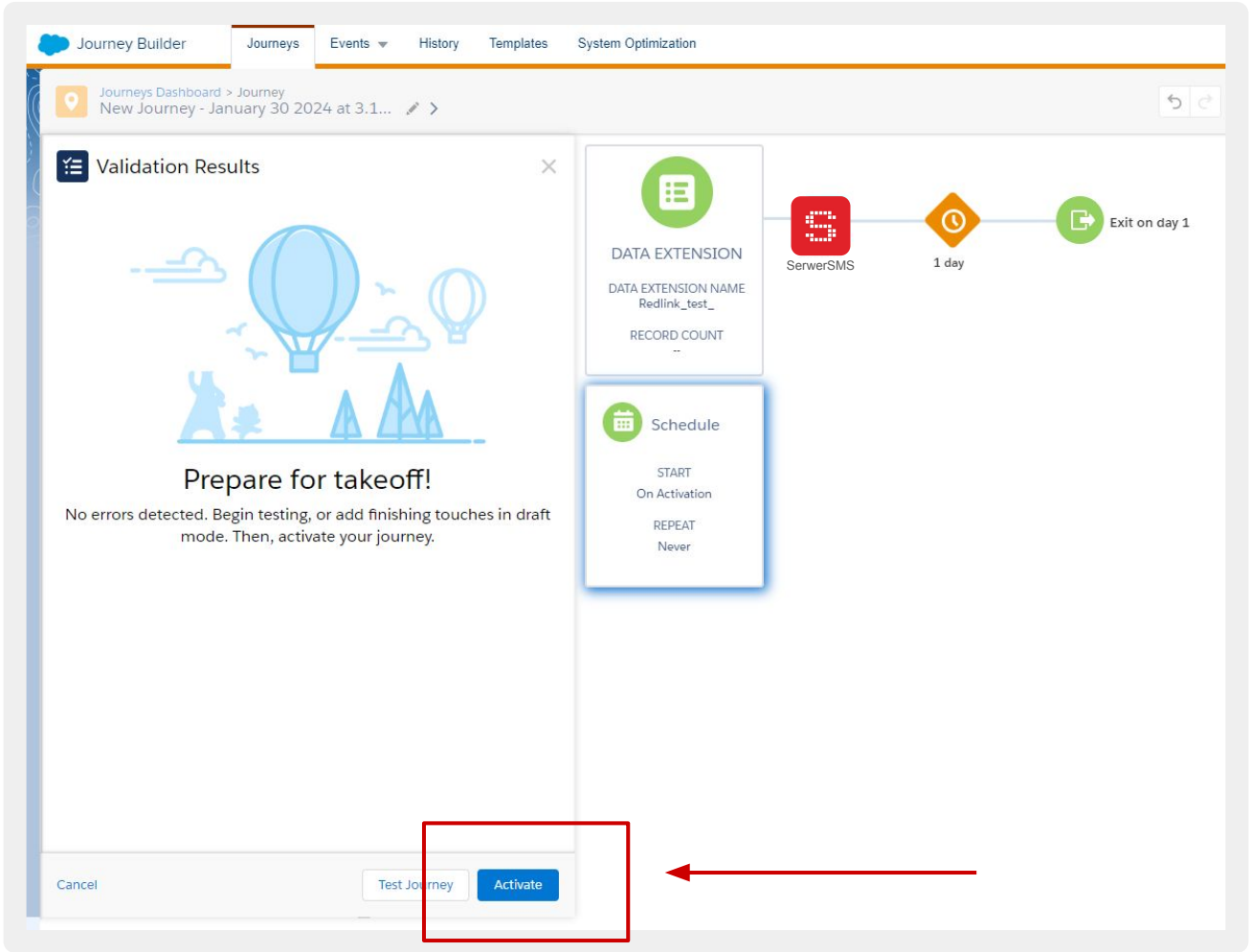
API

Journeys

Key	Version	Name	Sent	Unsent	Status	Active	
68	6c6	1	New Journey - January 30 2024 at 2.25 PM	0	0	DRAFT	no
aa	76b	1	New Journey - January 25 2024 at 4.29 PM	0	0	DRAFT	no
24	5a19	1	New Journey - January 24 2024 at 10.11 AM	100	0	STOPPED	no
4c	0c26	1	New Journey - January 24 2024 at 10.00 AM	0	0	STOPPED	no
a4	951	1	New Journey - January 23 2024 at 4.44 PM	2	0	STOPPED	no

Activating the campaign

Return to the Salesforce dashboard and activate the campaign.



Report generation

To generate the report, check the URL for DLR in the intermediary panel, then copy the link that is highlighted and paste it here → “Delivery Reports”. Delivery Reports you will find by logging into the SerwerSMS panel. Then on the left side you will find interface settings → HTTP API → Settings → delivery reports.

☐ Flash

☒ Shorten URL ?

URL for DLR ?
https://s1...ports

Copy

ClientID ?
inl...

ClientSecret ?
SL...NV

Base auth URL ?
https://...

Save

Settings IP Authentication API users

General settings for the HTTP API

Version feedback messages: ☒ Text (text descriptions for error and information) ☐ Numerical (error code details in [documentation](#))

Delivery reports

We recommend that delivery reports are sent directly to the URL of the Client. This setting reduces the amount of unnecessary polled system and contributes to the smooth and promptly update reports to the Client.

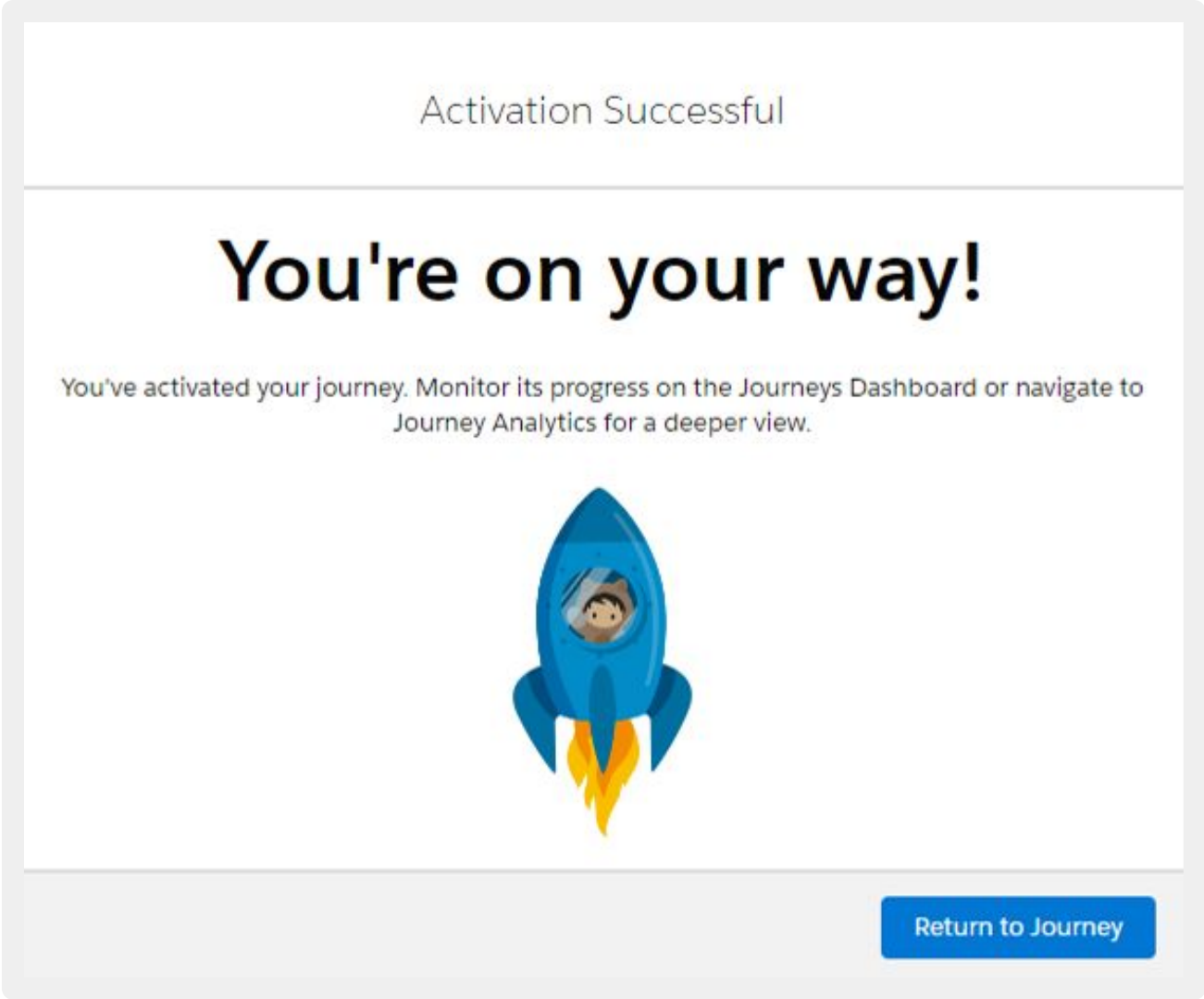
Update method: ☒ Simple-sending reports to a specified URL

URL:

Enter a URL below which are to be sent information service reports. Other data can be freely modified according to the needs of the Subscriber.

Example:
http://www.twojadres.pl/skrypt.php?smsid=#SMSID#&stan=#STAN#&data=#DATA#

The individual parameters are swapped as follows:
#SMSID# - alphanumeric string that identifies the SMS message (eg. Da58f3eaf7). If the message was sent with its own identifier USMSID, this value is podstawiona in this parameter.
#STATUS# - information on the state of delivery of SMS messages (the value served, Niedoreczono, unused, Waiting)
#DATA# - The date and time of receipt of the message format (2009-10-12 12:25:48)
#PRZYCZYNA# - cause not send or non-delivery messages (eg. Limit SMS messages ECO was exhausted)



Again check the status of the campaign, is it active? In this case, in the Active column, the message "no" will change to "yes".

Integration panel for marketing cloud

Logout

Serwer SMS.pl

Settings

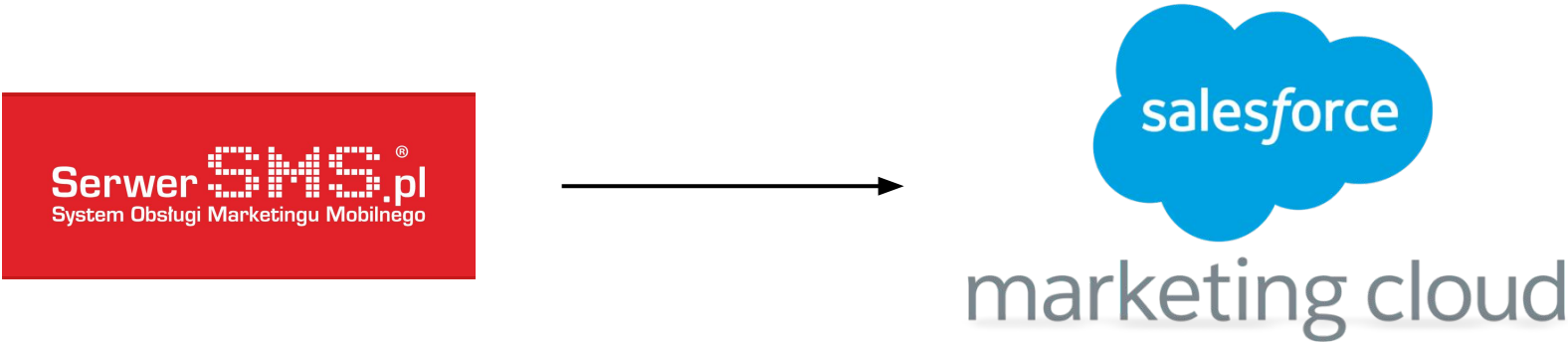
Journeys

Logs

API

Journeys

Key	Version	Name	Sent	Delivered	Undelivered	Unsent	Status	Active	Created
dt...	5	New Journey - April 11 2024 at 4:26 PM	1	1	0	0	RUNNING	yes	2024-04-12 09:57:50
dt...	4	New Journey - April 11 2024 at 4:26 PM	2	2	0	0	STOPPED	no	2024-04-12 09:49:17
dt...	3	New Journey - April 11 2024 at 4:26 PM	2	1	1	0	STOPPED	no	2024-04-12 09:05:06
dt...	2	New Journey - April 11 2024 at 4:26 PM	2	1	1	0	STOPPED	no	2024-04-11 16:34:52
dt...	1	New Journey - April 11 2024 at 4:26 PM	2	2	0	0	STOPPED	no	2024-04-11 16:27:03
bf...	12	New Journey - February 26 2024 at 4:41 PM	2	2	0	0	STOPPED	no	2024-03-08 16:21:04
bf...	11	New Journey - February 26 2024 at 4:41 PM	2	2	0	0	STOPPED	no	2024-03-06 14:35:58
bf...	9	New Journey - February 26 2024 at 4:41 PM	2	2	0	0	STOPPED	no	2024-03-06 12:46:27



CONGRATULATIONS!