# Configuration of custom tables

1. Add required attributes in existing tables.
2. Create custom tables if they don’t exist.

# Configuration of Content blocks

1. Identify the contents of the email / email template to be re-used and are candidate of being created as a Content Block.
2. Add Tags for easy search of content blocks.
3. If you don’t want to edit the content blocks, then enable the **Protected** toggle otherwise you can disable it.
4. Use proper naming convention for content blocks.
5. Evaluate the email and email templates to know the content blocks to be created.
6. Set them **Ready to send**, for using them in emails or email templates.

# Configuration of Compliance Profile

1. Create the **Consent Purpose** for each Compliance Profiles (e.g. Commercial, Transaction), first use OOTB Purposes
2. Create the **Topics** required for each Consent Purpose of a given Compliance Profile
3. Add appropriate Topics, Logo, design for the Preference Center
4. Be sure if the customer should opt-in or out-out when the button is clicked on the Preference Center.
5. Naming conventions to be followed.
6. When customers opt-in or opt-out for the purpose or topics. Those will be created as records in contact consent table .These can be used on journeys.

# Configuration of Domains

1. Create domains which have to be authenticated before using them.
2. If the Domains are already in use in another application(s), know when the switch will be done to Customer Insights – Journeys. This is needed for pre-release planning, schedule, execution, and post release testing.

# Configuration of Brand Profiles

1. Naming convention to be followed for easy usage of brand profiles in emails.
2. Create sender profiles.
3. Creating sender profiles include adding from name, from email and reply to email.
4. So, while using the Brand profiles in emails we can choose appropriate senders for the emails.

# Library

1. All the images, files etc must be uploaded to library only then we will be able to use them in emails.
2. Add tags and follow proper naming conventions for easy search.

# Configuration of Emails/Email Templates.

1. Created existing emails and email templates which were already existing in SFMC.
2. Steps to be followed.
3. Inspect emails in SFMC at element level and use the same properties as font-size, font-weight for emails in Dynamics.
4. Create sections and add elements like text, images and use the same properties as SFMC.
5. Use outer spacing so that all elements will be properly aligned for mobile view as well.
6. Add media code for mobile and create classes if required and use them at the element level for mobile view.
7. While using images we must first upload them to library only then we can use them in emails
8. Use Content blocks if necessary.
9. If you are initially using content blocks without setting any element before you may not find the content blocks available even if they are in ready to use state. If this situation occurs add any element and then add the content blocks and delete the element.
10. Use appropriate Compliance profile based on the requirements (e.g. Based on Business unit).
11. Use personalization such as first name, last name by clicking on personalization tab for the text view and map them.
12. To use conditions in emails, click on inline condition in personalization tab and give the appropriate conditions (e.g. contact whose country is pointing to Germany). While saving the conational copy the conditional code and use that code in html of the email.
13. Check the audience of emails weather it is contact or customer profile. If we use this email in segment based journeys which are coming from Customer Insights Data then we have to set personalization to customer profile.
14. Set the applicable subject and preview text.

# Segment

1. To use the segments created by Customer Insights Data click on settings tab in left pane, scroll down under data management tab click on customer Insights connector and click on connect.

# Configuration of journeys

1. Follow proper naming convention.
2. Select weather the journeys are segment based or trigger based and choose appropriate segments or triggers.
3. For segment-based journeys set start date, set time zone, and only set end date if required.
4. Select the frequency weather the audience are static or dynamic or repeat the journey for same set of in a time limit.
5. Add frequency cap i.e. repeat the journey until a specific condition is met if required.
6. Click on ready to send to execute the journeys.