Welcome to the Salesforce Marketing Cloud

Table of Contents

Step 1: Marketing Cloud Fundamentals

A. Account and Login Navigation **2**
B. Marketing Cloud Home Page Navigation **2**
1. Member Account ID (MID) 2
1. Marketing Cloud Home Page Navigation Activity 3
C. Email Application **4**
1. Email Application Home Page 4
2. Email Application Workspace 5
3. Creating Folders 6
D. Security Settings **7**
a. Manage your Security Settings 7
E. My Users **9**
a. Defining your Users 9
F. Sender Profile 10
a. Identify From Names 10
G. Delivery Profile 11
a. CAN-SPAM 11
b. Header & Footer requirements 11
H. Send Classification 12
a. Commercial vs. Transactional 12
I. Brand Builder 13
Questions 14

Step 2: Subscribers

A. Subscribers Rule **15**
B. Identifying Data Sources **15**
C. Identifying Profile & Preference Attributes **16**
1. Profile Attributes 16
2. Preference Attributes 18
D. Managing Lists **19**
E. List Management **20**
1. Subscribers Tab 20
2. Properties Tab 21
3. Tracking Tab 22
Questions 23

Step 3: Creating Your Email

1. Path to Email Success 24
A. Portfolio **25**
1. Content Organization 25
B. Email Building Checklist **27**
C. Template Creation **28**
a. Template Samples 28
D. Content Forms **30**
E. Hexidecimal Color Code **32**
F. HTML Checklist **33**
Questions 34

Step 4: Testing & Sending Email

1. Workflow 35

A. Before you Send 36

a. Before you send checklist 36

B. Test Sending 37

a. Test Email Addresses 37

C. Sending your Email 38

a. Send Type Breakdown Chart 38

Questions 39

Step 5: Sending & Tracking

A. What is Tracking? 40

a. Tracking Elements 40

B. Tracking Grid 41

a. Tracking Grid Preferences 41

C. Creating Lists from Tracking Data 42

D. How to Share 43

a. How to send your Tracking Information 43

Questions 44

Welcome to Salesforce Marketing Cloud!

This workbook was designed to welcome you to the Marketing Cloud and assist you as you begin your path to power 1:1 customer journeys.

You can use this workbook to follow along while you set up your account and get a general overview of the platform.

- ❑ We invite you to join the Getting Started with Email Webinar Series (https://webevents.force.com/s/marketing-cloud.html) where we share how to get you up and running with the Marketing Cloud. The 5 steps in this workbook align to the 5 webinars in the series.

Marketing Cloud Fundamentals

A. Account Login and Navigation

Use this worksheet to access the email application and navigate through everyday situations.

You'll want to ensure that you have the correct username and password. If you do not have this information, you'll need to reach out to your account administrator or Global Support at help@exacttarget.com.

B. Marketing Cloud Home Page Navigation

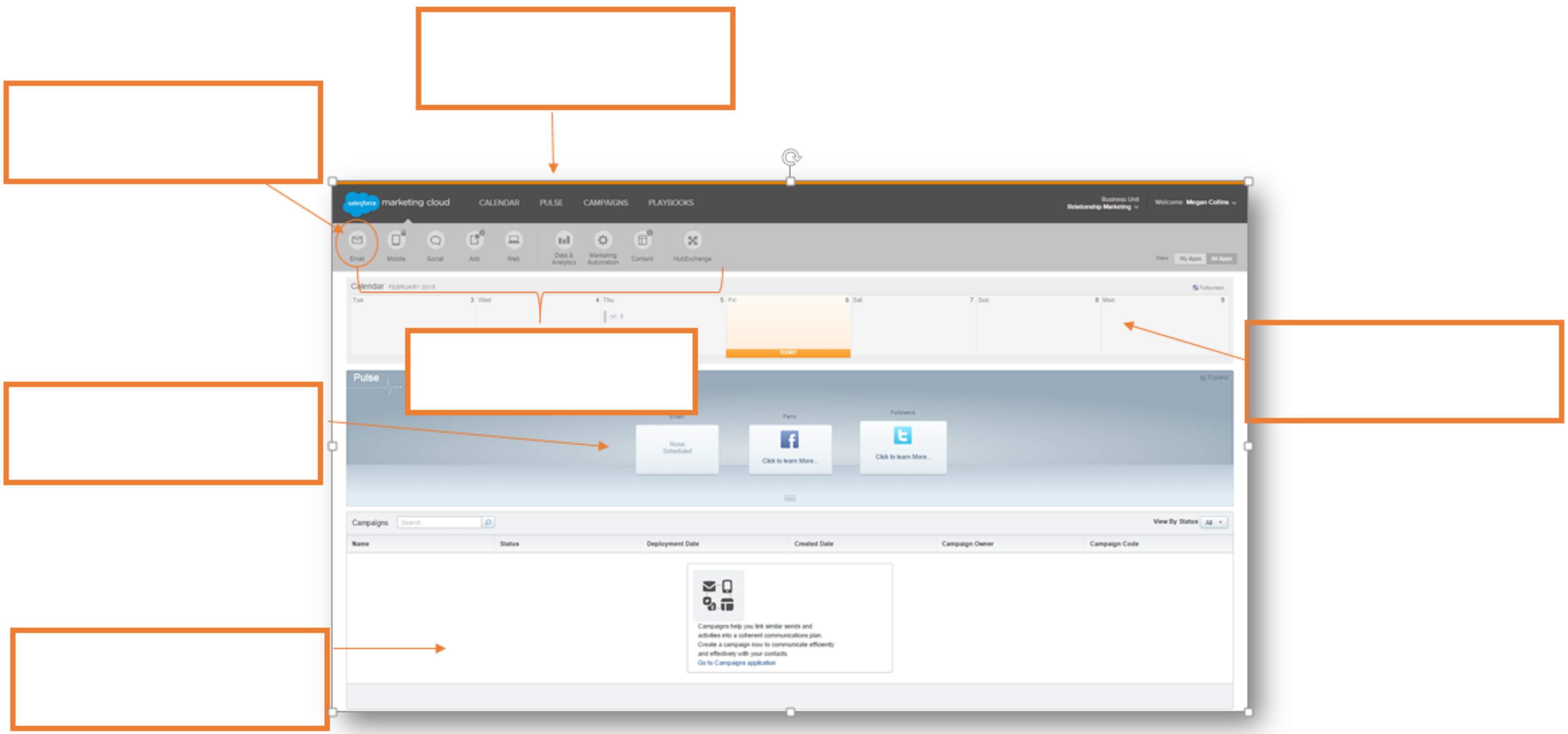
Now let's determine how to find out account information. In the top right corner you will see your account name. Hover over your account name to find your Member Account ID, or MID. You will need to know your MID when you are logging a case with Global Support.

1. Member Account ID

Member Account ID (MID)

2. Marketing Cloud Home Page Navigation

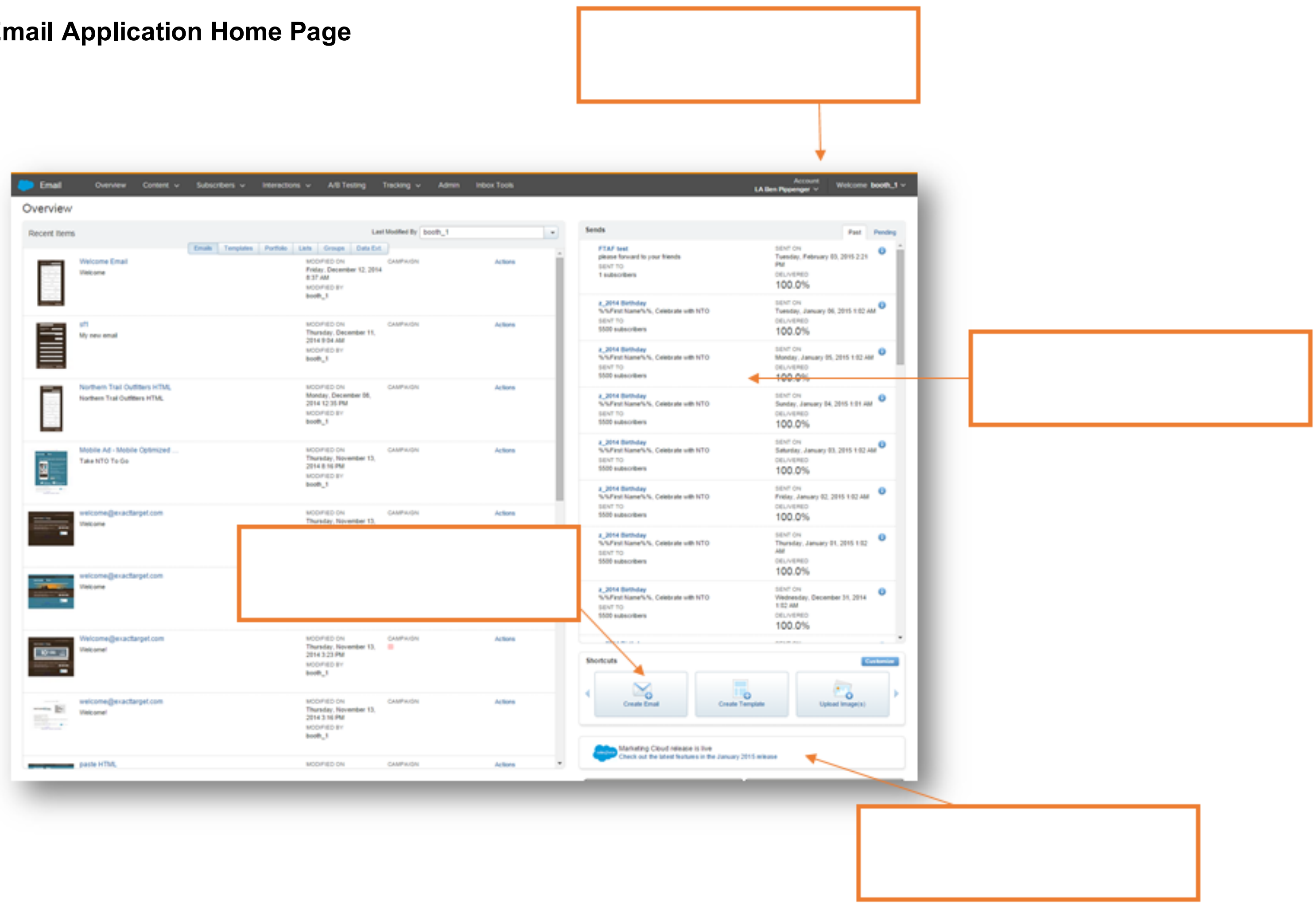
For the next activity you will get the chance to navigate through the Marketing Cloud homepage. Take a minute to label the different areas of the homepage and highlight areas that you would like to learn more about or think might be helpful to understand.



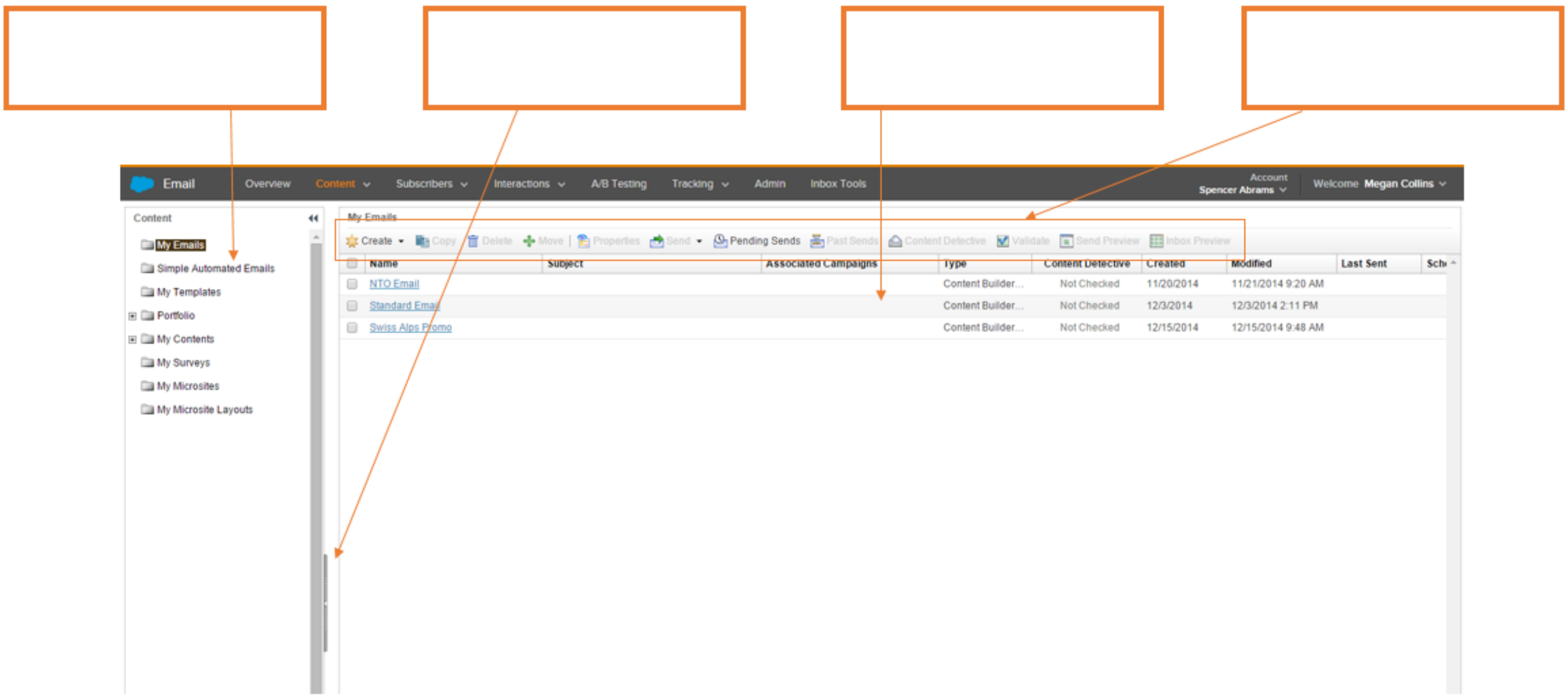
C. Email Navigation

Follow along with the webinar to fill in the two diagrams below including the Email application home page and inside the Email application workspace.

1. Email Application Home Page



2. Email Application Workspace



3. Creating Folders

Take time now to organize your thoughts. Jot down the folders you plan to make so you can keep organized in the application. You can use the following questions to get you thinking.

- What kind of campaigns will you be sending?
- Will you break it down by season/quarter?
- Do you have a series of emails that could be a folder?
- Would you rather group it by content? Accessories, Shoes, Women, Men etc.

Creating your Folders	
Folder Title	What's included

D. Security Settings

Use the following activity to identify how you will manage your security settings. You may need to reach out to another department to set the correct security options for your company.

Manage your Security Settings	
When would you like your session to automatically timeout?	❑ 20 min ❑ 1 hr ❑ 2 hrs ❑ 4 hrs ❑ 8 hrs
Does your account require secure connections?	Yes or No
Do you want your login to expire after inactivity?	❑ 30 days ❑ 60 days ❑ 90 days ❑ 1 year ❑ Never
How many login attempts are acceptable before a lockout?	❑ 3 ❑ 5 ❑ 10
Do you want your account to count invalid logins across sessions?	Yes or No
What is your minimum username length?	❑ 4 ❑ 6 ❑ 8 ❑ 10
How long do you want your Device Activation Code lifetime to be?	
How long do you want your device to be inactive before it requires reactivation?	
What is your minimum password length?	❑ 6 ❑ 8 ❑ 10

How complex do you want your password to be?	How many alpha? How many numeric? How many special characters?
How many passwords do you want your account to remember?	
When do you want your user password to expire?	❑ 30 days ❑ 60 days ❑ 90 days ❑ 1 year ❑ Never
Do you want to exclude API users from password expiration?	Yes or No
Would you like a password change confirmation email?	Yes or No

E. My Users

In this activity you'll think through the different users that you will need for your account. Think about the different permissions they will need in order to be successful. If you need more information on permissions please visit help.exacttarget.com

When defining the people in your organization that will have access to the Email application, below are some items to be thinking about:

- Who, in your company, is going to access the Salesforce Marketing Cloud Email Application?
- Each user in the Email application has a role that determines what tasks they can complete.
- What roles need to be created for your company?

Before you start building users in your account, list and define the users and their properties.

Username	Full Name	Reply Email	Access	Permissions	Temporary PW

F. Sender Profile

Let's think about what your From Names will look like for your campaigns.

From Name Discovery	
Is your From name a user from the drop down menu?	Yes or No
Do you need to add a specific name in?	Yes or No
If you need a specific name, what will it be?	a. b. c. d.
Do you have permission to use this name and email?	Yes or No

G. Delivery Profile

It is important to know the difference between a Commercial Email and a Transactional Email. Let's review that now!

CAN- SPAM
The Assault of Non- Solicited Pornography and Marketing Act, or the CAN-SPAM Act, that is the US federal standards
Commercial emails are when the primary purpose of the message is to deliver commercial content. These MUST include your physical mailing address and provide an opt-out/unsubscribe mechanism.
Examples from your program include:
Transactional emails are when the primary purpose is to deliver transactional content. An unsubscribe link is not required in transactional messages.
Examples from your program include:

Each Email and or Campaign will have specific header and footer requirements. Let's get your requirements in order for your first email.

Email Name	Associated Campaign	Header	Footer

H. Send Classification

Let's get more specific. Which emails do you have that are Commercial and which emails do you have that are Transactional?

Reminder: If you choose to use a unique header, note that you will have to create a new content area.

Email	Type	Sender Profile	Delivery Profile
	❑ Commercial ❑ Transactional	❑	❑
	❑ Commercial ❑ Transactional	❑	❑
	❑ Commercial ❑ Transactional	❑	❑
	❑ Commercial ❑ Transactional	❑	❑
	❑ Commercial ❑ Transactional	❑	❑

I. BrandBuilder

BrandBuilder is a private labeling tool that allows you to provide a branded experience to both your application users and your subscribers. Take the time now to make sure you have built your brand to the highest standards!

BrandBuilder Checklist		
Action Items	**Completed**	**Need Review**
Add your logo/header background color to every screen, including the login screen	❑	
Change the color scheme of the primary navigation buttons	❑	
Brand your survey and Forward to a Friend landing pages as well as the Profile and Subscription Center	❑	

Still have questions? List out your open questions below and use help.exacttarget.com to find your answers. If you run into any difficulties finding answers, remember you can always reach out to Global support at help@exacttarget.com .

Have a question about your account? We have an answer.	
Questions	**Answers**

Step 2: Subscribers

A. Subscribers Rule

Which of the following is not a part of Subscribers Rule:

1. Serve yourself
2. Honor their unique preference with regard to communication, content, frequency & channels
3. Deliver them timely, relevant content that improves their lives
4. Serve the individual

B. Identify Data Sources

For this activity, you can list the data sources that you will use for your first send.

File Name	Data Source	Notes

C. Identifying Profile and Preference Attributes

1. Profile Attributes

Take a moment to define your profile attributes. Think of all of the fields that you will need to power your targeted, relevant communications and for your future filters and groupings.

Examples: Birthday, gender, location etc.

Profile Attributes						
Attribute	**Type**	**Required**	**Default**	**Hidden**	**Read-Only**	**Default Value**
Email	Text	■	■	❑	❑	
Full Name	Text	❑	■	❑	❑	
User Defined	Boolean	❑	■	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	

		❑	❑	❑	❑	

Attribute	Type	Required	Default	Hidden	Read-Only	Default Value
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	
		❑	❑	❑	❑	

2. Preference Attributes

Take a moment to think about the possible ways you can use preference attributes to power your campaigns. Remember, preference attributes are yes / no scenarios.

Example: HTML, Monthly Newsletters, New Product Announcements etc.

Preference Attributes				
Attribute	**Default**	**Hidden**	**Read-Only**	**True or False**
HTML Email	■	❑	❑	
	❑	❑	❑	
	❑	❑	❑	
	❑	❑	❑	
	❑	❑	❑	
	❑	❑	❑	
	❑	❑	❑	
	❑	❑	❑	
	❑	❑	❑	
	❑	❑	❑	
	❑	❑	❑	

D. Managing Lists

Let's think about what communications you can manage with lists? In the table below, outline the lists you will need to create in your account.

Example: Monthly Newsletter, Weekly Specials, New Products or Class information etc.

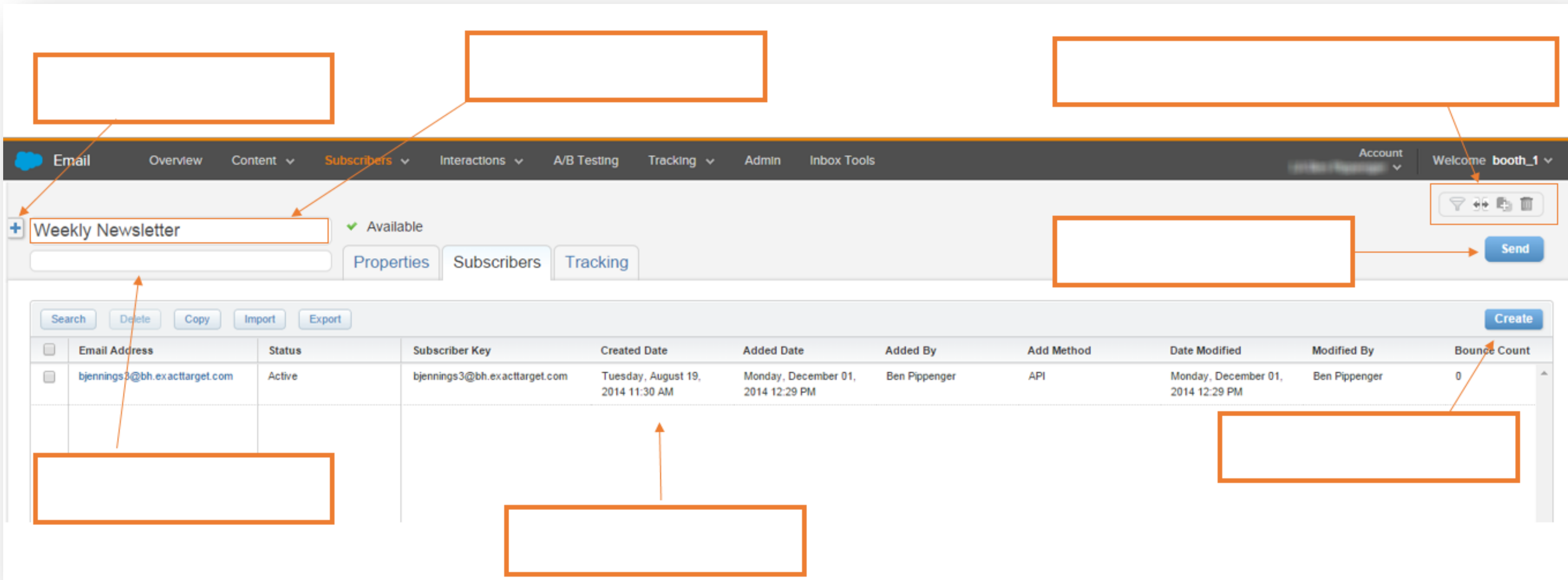
Lists	Description

E. List Management

Follow along with the webinar to navigate through a list's properties, subscribers and tracking information. Fill in the blanks for the diagrams below for each section.

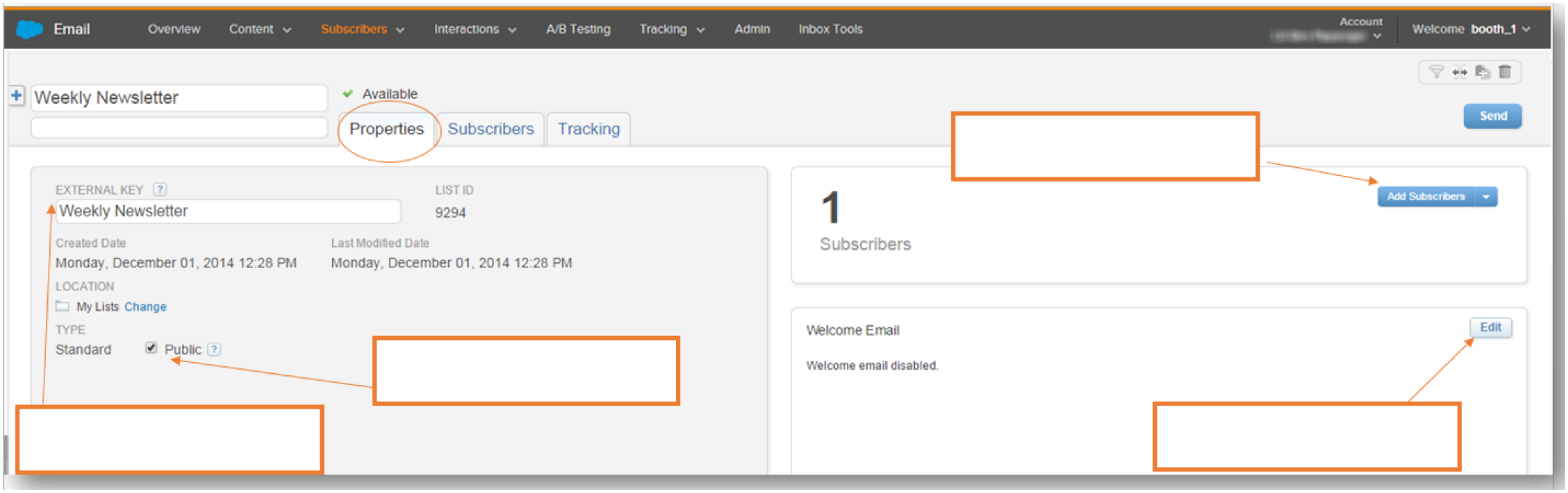
1. Subscribers Tab

The Subscribers tab is the initial screen you will see when you choose a list. Here you will see all of the subscribers included in your list. Fill in the blanks to get a better idea of how to manage your lists.



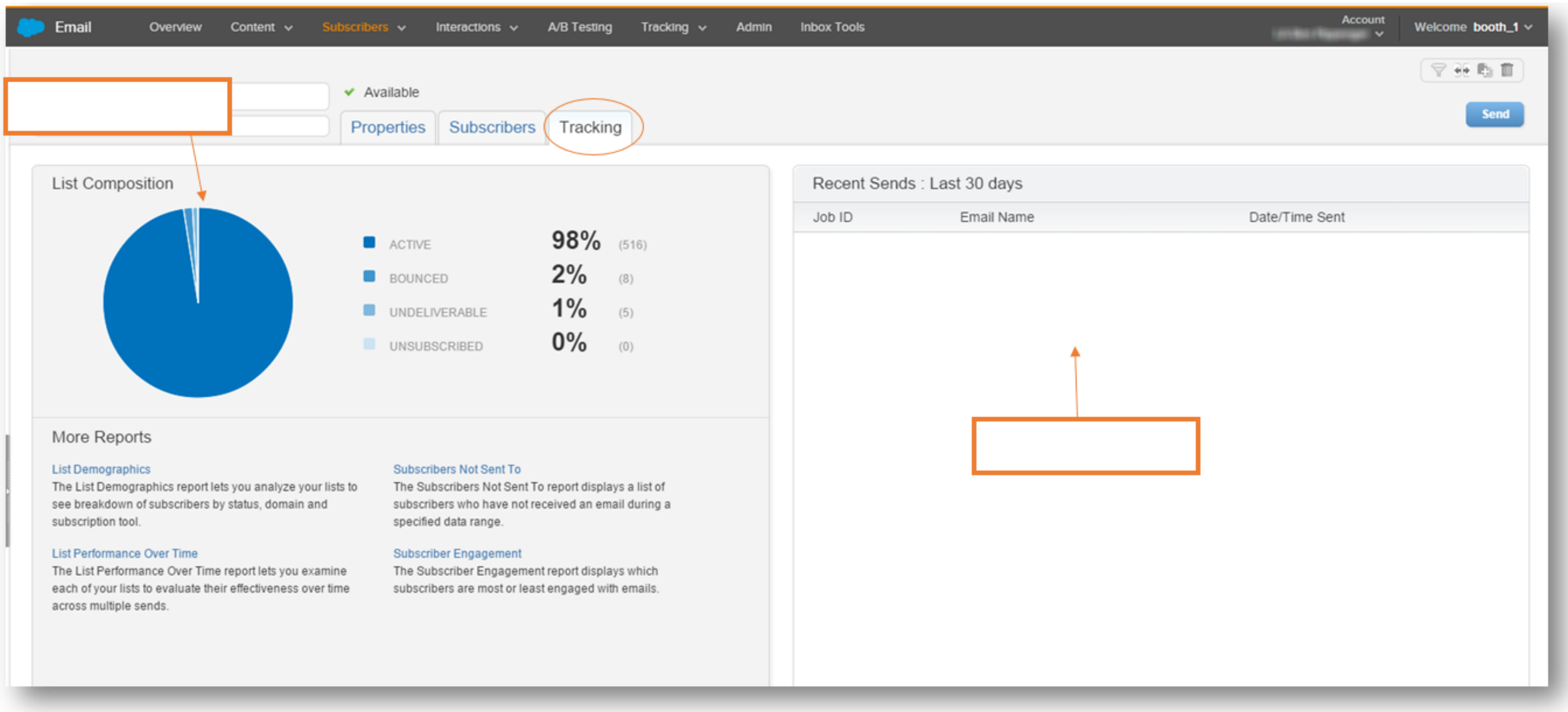
2. Properties Tab

The properties tab shows general information about your list and also shows a count of how many subscribers are in the list. Fill in the blanks to learn more about your list's properties.



3. Tracking Tab

The tracking tab is the final step of your list navigation. Here you will see the most recent sends as well as your list composition. Fill in the blanks to see how you can track the subscribers in your list.



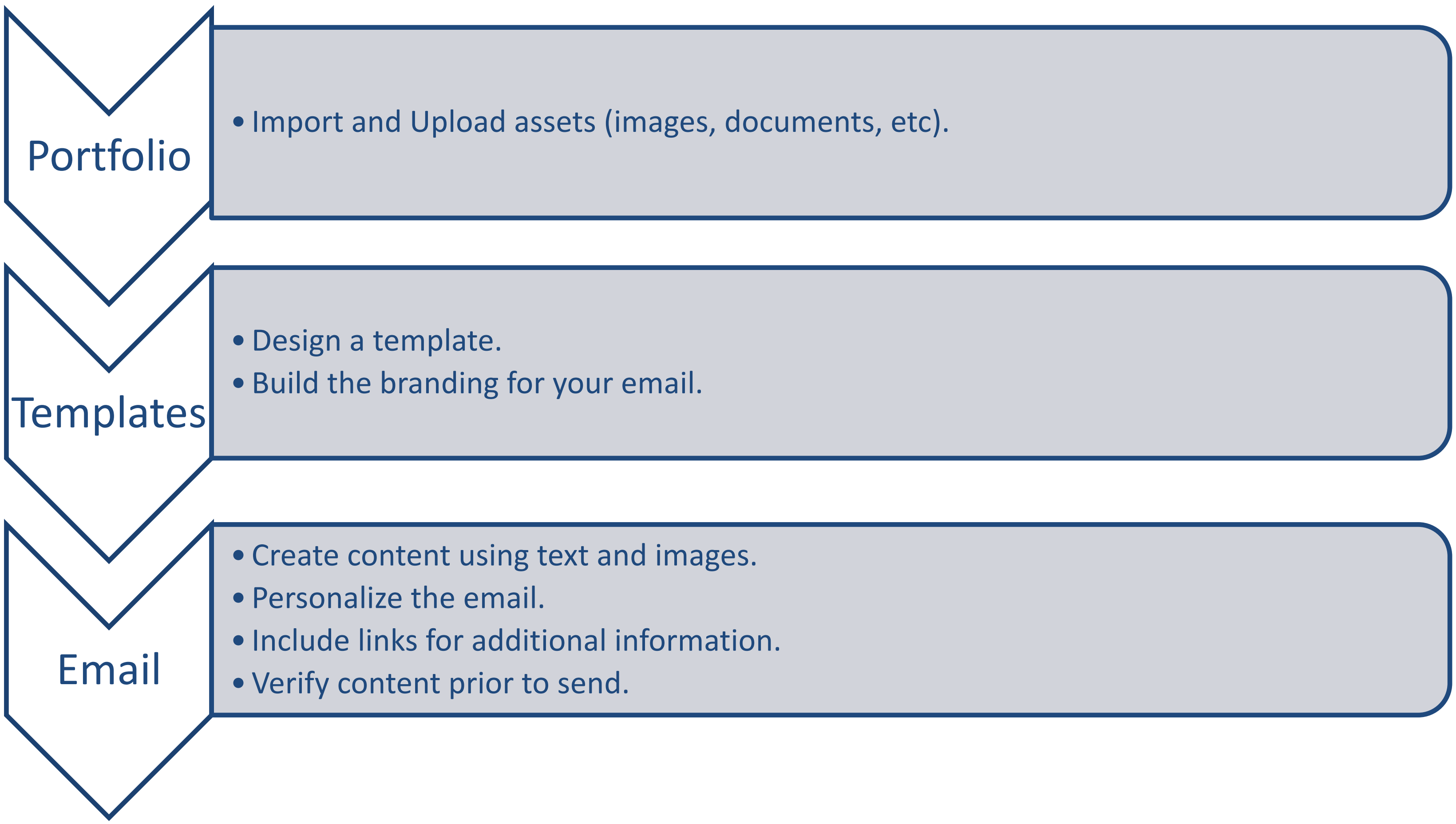
Still have questions? List out your open questions below and use help.exacttarget.com to find your answers. If you run into any difficulties finding answers, remember you can always reach out to Global support at help@exacttarget.com .

Have a question about your account? We have an answer.	
Questions	**Answers**

Step 3: Creating Your Email

1. **Path to Email Success**

You've learned a lot! Let's take a second to review the Path to Email Success. In this section we will be focusing on getting organized with Portfolio, creating templates and making sure you have everything ready to send your email.



A. Portfolio

1. Content Organization

For the next activity, let's think of how you are going to organize your Content. Outline your folder structure within Portfolio and how you plan on utilizing the folders.

Content Organization			
Folder Name	Images Included	Content Included	Media Files Included

Folder Name	Images Included	Content Included	Media Files Included

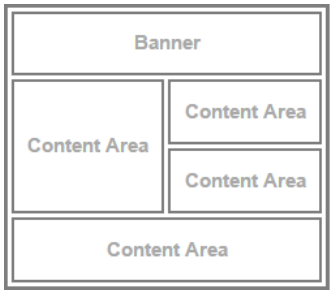
B. Email Building Checklist

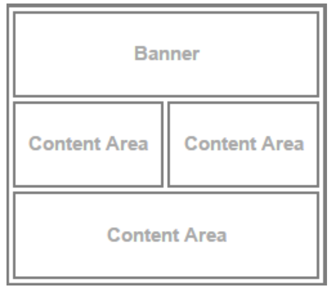
Before you get started building an email, let's make sure you have everything you need. Refer to this checklist as you begin building your emails and before you know it, you'll be a pro!

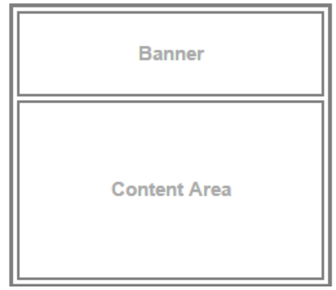
Email Checklist	
1. Are all of your images created?	❑
2. Have you checked the file types that are supported?	❑
3. Have you created a banner?	❑
4. Do you have all of your content uploaded into Portfolio?	❑
5. Do you have your content placement identified?	❑
6. How many images/ content areas will you need?	❑
7. Have you chosen a template?	❑
8. Have you reviewed the Template Size Guidelines	❑
9. Will you need to build HTML code outside of the app?	Y or N
10. Do you know your hexidecimal color codes?	❑
11. Do you know the border color for the banner, if needed?	❑
12. Do you know the background color, if needed?	❑
13. Do you have a header that is less than 600 pixels?	❑
14. Do you have a subject line?	❑
15. Do you have your preheader identified?	❑

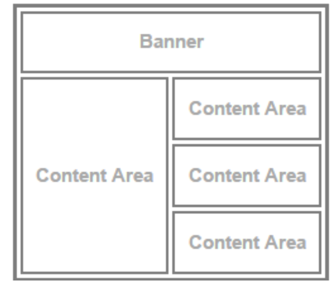
C. Template Selection

Trying to figure out what templates work for you? Go ahead and pick a few that you think might be useful for different emails.

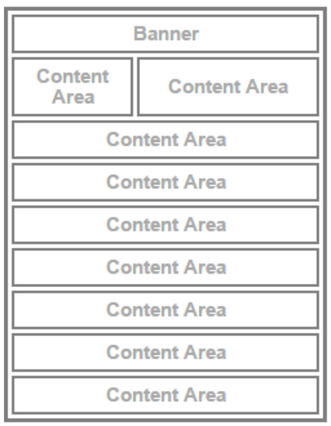


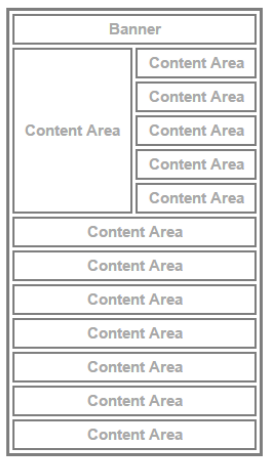


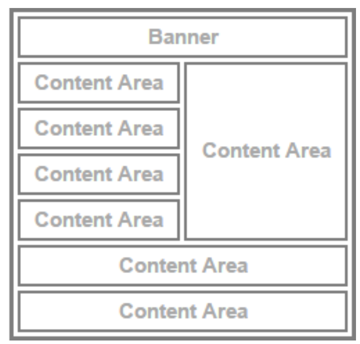


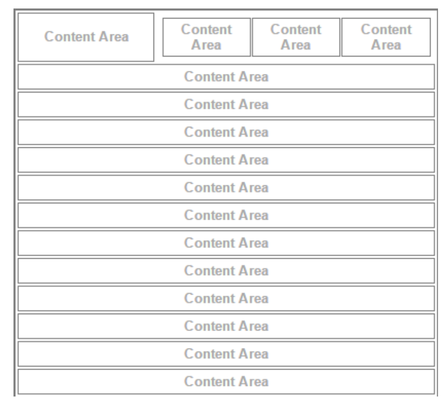


A ________________ B ________________ C ________________ D ________________









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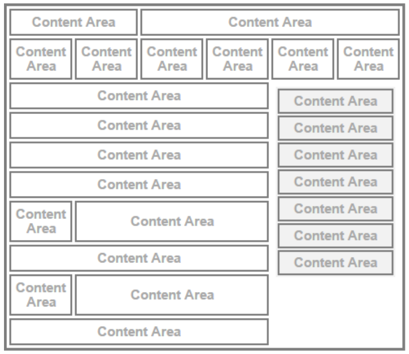
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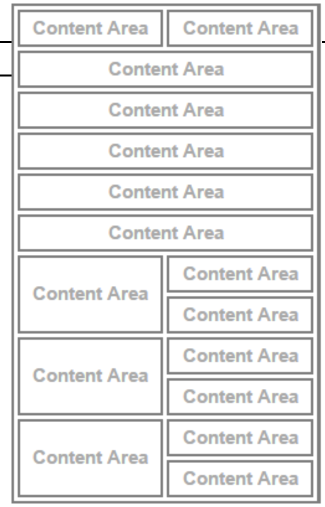
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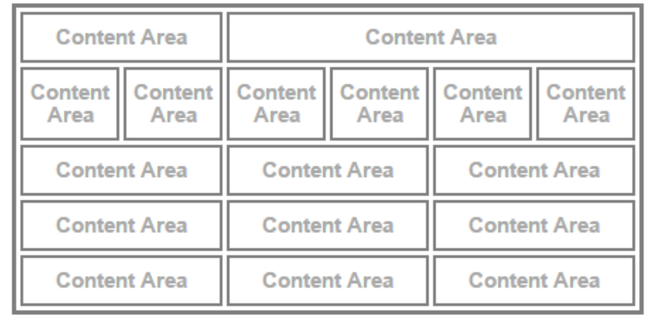
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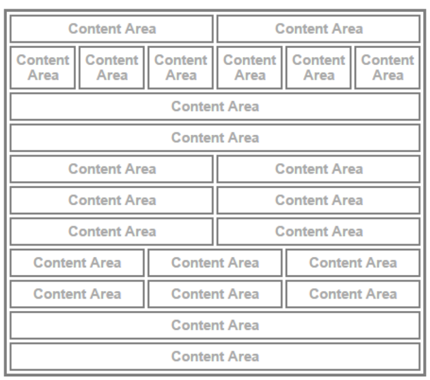
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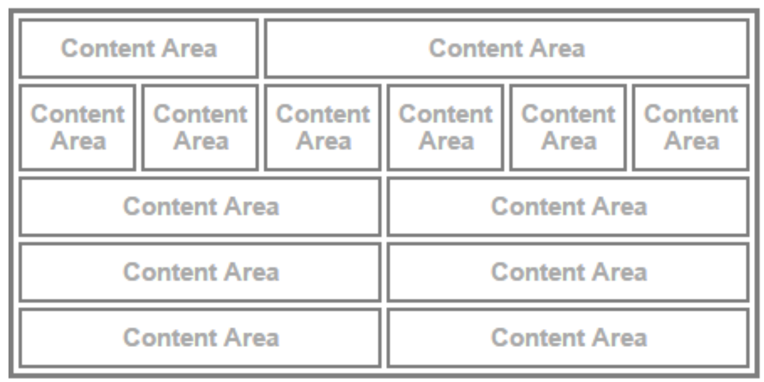
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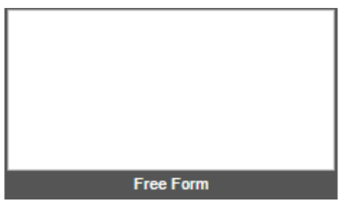
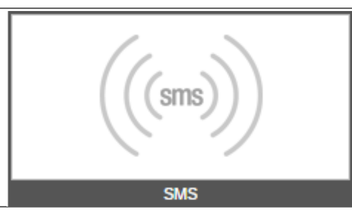
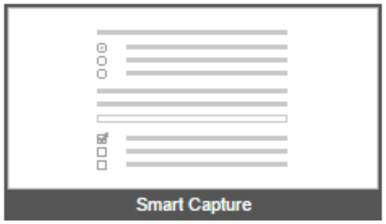
D. Content Forms

Consider the different forms of content and list how you can utilize them in your emails

Content Forms	How will you use them?
	
	
	
	

 Image Left	
 Image Right	
 Free Form	
 <HTML> HTML Only	
 sms SMS	

E. Hexidecimal Color Code

Use this next activity to gather the correct hexadecimal color codes for your emails. Then you'll be able to quickly refer back to it if you need to add a spice of color! Different colors may need to be used for different parts of your email.

Example: FFFFFF used for Border Color

Hexidecimal Color Code	
Code #	**When to use this color**

F. HTML Checklist

In order to create an HTML template, you need ensure the appropriate additions are made to your HTML code. Use this as a checklist to have a completed HTML code before creating a template.

HTML Checklist	
Email Open Tracking	❑
Content Areas	❑
Tracking Alias	❑
CAN-SPAM Compliance	❑
Personalization Strings	❑

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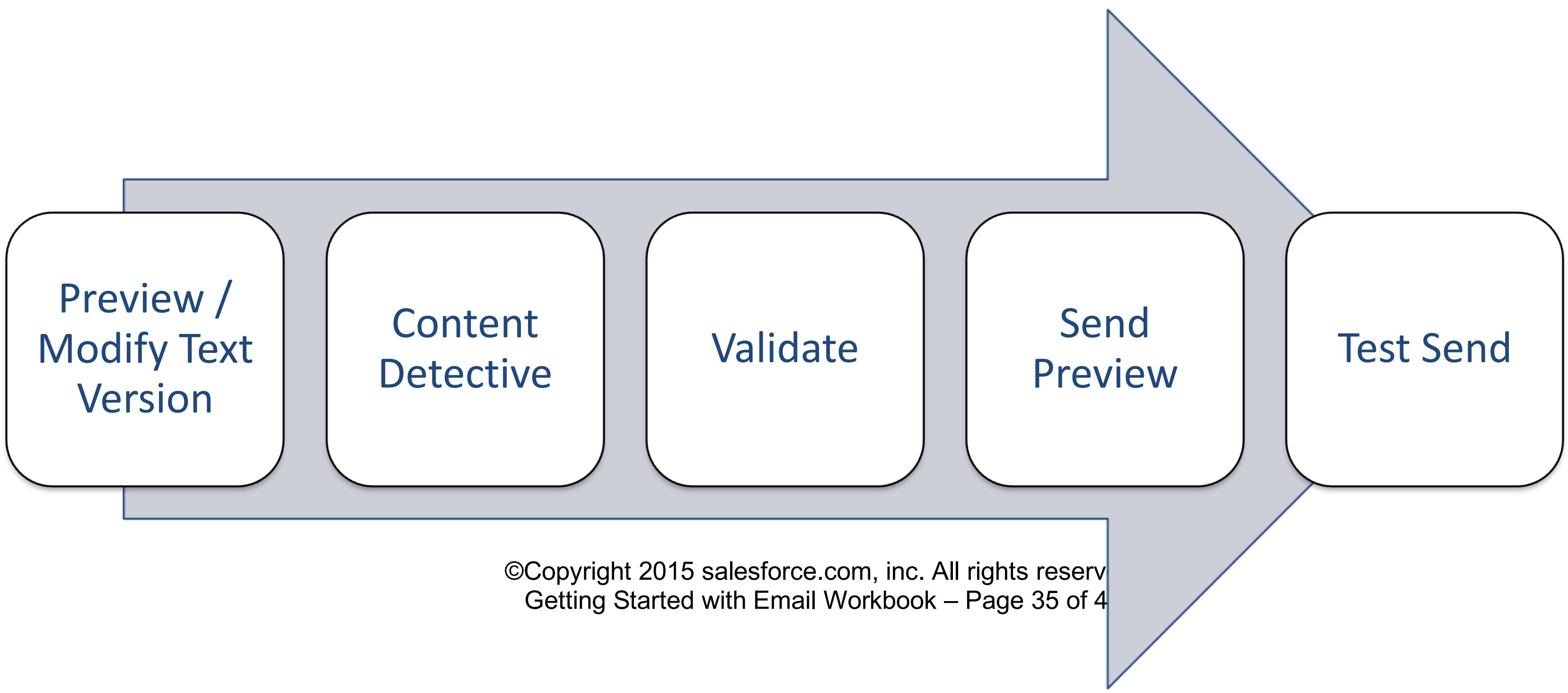
Have a question about your account? We have an answer.	
Questions	**Answers**

Step 4: Testing & Sending Email

1. **Workflow**

Below is a diagram for the workflow you will walk through when testing and sending an email.



A. Before you Send

You want to make sure you send the perfect email. This list will help you

Before you Send Checklist	
Review the deliverability tips to ensure that your email reaches as many subscribers as possible.	❑
Run the Spell Check in the content areas in your email. This is done within each content box by clicking the Spell Check icon, or by selecting Edit > Check Spelling.	❑
Preview your email using Send Preview	❑
Run Content Detective and make any necessary updates	❑

Validate your email	❑
Perform a test delivery of your email	❑

B. Test Sending

Before you begin testing, think about who you want to receive your test emails. These may include subscribers who are approvers, key stakeholders, and additional members of your email team.

List the email addresses that you would like your test emails to be sent to. You can send to up to 5 email addresses at one time.

Test Email Addresses
1.
2.
3.
4.
5.

C. Sending Your Email

Each type of send option has different steps. Let's keep organized by referring to the following guides for each unique type of send.

Test Send	Simple Send	Guided Send
From the send menu, select Test Send	From the send menu, select Simple Send	From the send menu, select Guided Send
Enter up to five email addresses to receive the test send	Review Subject and From Name, select a List for sending, and a send data and time	Click Next on the first screen of the Wizard
Click Send	Click Send	Select the list(s) or group(s) to send to
Confirmation is displayed on screen	Confirm Send	Select Exclusion Lists (if required)
		Modify the subject, From Options, Send Options, and Test

		Options (if required)
		Select to send the email immediately, or schedule for a specific date and time
		Review and confirm the configuration
		Click Send
		Confirmation is displayed in the wizard when your email has been sent/scheduled. Click Finish

Still have questions? List out your open questions below and use help.exacttarget.com to find your answers. If you run into any difficulties finding answers, remember you can always reach out to Global support at help@exacttarget.com .

Have a question about your account? We have an answer.	
Questions	**Answers**

Step 5: Tracking Your Email

A. What is tracking?

Tracking is an aggregated collection of data that allows you to view critical elements. Which of the following elements do you think will help you track your emails?

Tracking Elements	How will it help?
Deliverability Rate	
Undeliverables	
Unique Opens	
Total Opens	
Open Rate	
Unique Clicks	
Total Clicks	
Click Rate	
Unengagement	
Conversions	
Surveys	
Forward to a Friend Activity	

B. Tracking Grid

Which of the following elements do you think will help you track your emails and would be most valuable to having included in your workspace? Select which columns to display in the Tracking grid.

Tracking Grid			
ID	❑	Total Clicks	❑
Name (This column is required to be visible)	❑	Unique Click-Through Rate	❑
Subject	❑	Open Rate	❑
From Name	❑	Undeliverables	❑
Date/Time Sent (This column is required to be visible)	❑	Deliverability Rate	❑
Status	❑	Unsubscribes	❑
Emails Sent	❑	Unsubscribes Rate	❑
Delivered	❑	Survey Responses	❑
Unique Opens	❑	Unique Conversions	❑
Total Clicks	❑	Total Conversions	❑
Unique Clicks	❑	FTAF-Forwarders	❑
Total Clicks	❑	FTAF- Recipients	❑
		FTAF- Subscribers	❑

C. Creating Lists from Tracking Data

Creating a list from your tracking data is very important. Follow along with the steps below to get you through your first list creation, then you'll be a pro!

Creating a List from Tracking Data	
1. Click the hyperlinked item you would like to create a list for	❑
2. Click Copy All in the toolbar	❑
3. Select to add to an Existing List or New List - Existing List: Select the list from the dropdown - New List: Enter a Name, description and visibility	❑
4. Click Copy	❑

D. How to Share

Certain tabs allow you to create a PDF, Excel file or both. Before starting to track your subscriber data you'll need to know what form of tracking information your team or certain individuals would like to view. Use the below table to help outline who you will send tracking to, how you will send it over, and how frequently you will send it.

Tracking Information		
Team or Employee Name	Document Type	How often do they need it?
	PDF ❑ Excel ❑	Daily ❑ Weekly ❑ Bi Weekly ❑ Monthly ❑ Bi Monthly ❑ Other ______________________
	PDF ❑ Excel ❑	Daily ❑ Weekly ❑ Bi Weekly ❑ Monthly ❑ Bi Monthly ❑ Other ______________________
	PDF ❑ Excel ❑	Daily ❑ Weekly ❑ Bi Weekly ❑ Monthly ❑ Bi Monthly ❑ Other ______________________
	PDF ❑ Excel ❑	Daily ❑ Weekly ❑ Bi Weekly ❑ Monthly ❑ Bi Monthly ❑ Other ______________________
	PDF ❑ Excel ❑	Daily ❑ Weekly ❑ Bi Weekly ❑ Monthly ❑ Bi Monthly ❑ Other ______________________
	PDF ❑ Excel ❑	Daily ❑ Weekly ❑ Bi Weekly ❑ Monthly ❑ Bi Monthly ❑ Other ______________________
	PDF ❑ Excel ❑	Daily ❑ Weekly ❑ Bi Weekly ❑ Monthly ❑ Bi Monthly ❑ Other ______________________
	PDF ❑ Excel ❑	Daily ❑ Weekly ❑ Bi Weekly ❑ Monthly ❑ Bi Monthly ❑ Other ______________________
	PDF ❑ Excel ❑	Daily ❑ Weekly ❑ Bi Weekly ❑ Monthly ❑ Bi Monthly ❑ Other ______________________

Still have questions? List out your open questions below and use help.exacttarget.com to find your answers. If you run into any difficulties finding answers, remember you can always reach out to Global support at help@exacttarget.com .

Have a question about your account? We have an answer.	
Questions	**Answers**