Automation Studio

All activity definitions come directly from Salesforce Help Documentation. No better study material than going directly to the source!

Why use Automation Studio?

ETL - Extract, Transform and Load

Automating:
- Your audience segmentation
- Imports
- Exporting reports
- Staging your data for journey entry

To make your life easier!

To become a lazy marketer!

To earn a Marketing Cloud superhero cape!
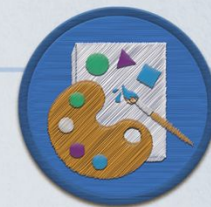
What makes an automation?

Starting Source + **Activities** + **Steps** = **Workflow**

Workflows can have multiple steps and each step can have multiple activities. Keep in mind that all activities in a step run at the same time and the automation won't move on to the next stop until they have all successfully completed.

Starting Sources

Schedule

Run Once

Scheduled (Hourly, Weekly, Monthly, Annually)

File Drop

Listens for a file dropping into a folder.

OR

Based on a naming convention.

For the file drop, each file can only trigger one automation. That means you need to get all the activities happening off the back of that file into one automation.
Keep it tidy!

Whew - this one is easy!

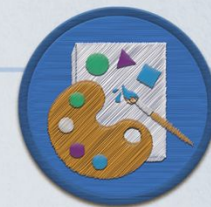| ACTIVITY NAME	DESCRIPTION
Send Email	Choose and configure an email message to send on its own or in sequence according to a schedule. Configuring the Send Email Activity creates a Send Definition that can be used in other automations.
SMS Activity	Initiates an SMS message.
Send GroupConnect	Initiates a GroupConnect message.

Especially useful for handling large data volume sends or for automated sending to the same audience each time. Think internal notification that needs to go out weekly!

Advanced or Automated Segmentation

ACTIVITY NAME	DESCRIPTION
SQL Query	Retrieves data extension or data view information according to criteria you set, then includes that data in a data extension. Use SQL to create the query used in this activity.
Filter	Applies a data filter to create a group or data extension containing records that meet a set of criteria.

SQL is great for staging your data if you're bringing multiple data sources together. Imagine the power of bringing your click data from system view tables together with your segmentation from your other data. Once you've brought it all together, you can inject the contacts into a journey with a journey entry source. Hourrah!

A few things you should know about queries...

- Queries use SQL (**Structured Query Language**).

- Can **combine multiple sources of data** and only bring back the attributes (or columns) that you need.

- Only queries can be used to access **system view tables**.

- You need to **create the results data extension** first.

- They have a **30 minute runtime limit**.

  - That means you should leave them to run in a step by themselves.

  - Also you should try to use WHERE criteria to limit how much data is returned and only return the data you actually need to ensure you don't hit the limit.

Filters on the other hand...

- Simple **point-and-click** tool.

- Based on **one single data source**.

- Returns **all the attributes** from the source data extension.

- **Creates the results** data extension for you.

- Can be either:

    - A **filtered data extension** - snapshot of the data now that can be refreshed manually.

    - An automated **filter activity** - uses a data filter (created in Email studio) to make a filter activity in Automation Studio that can be automated.

Getting the Flow Right
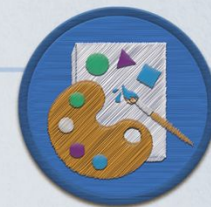
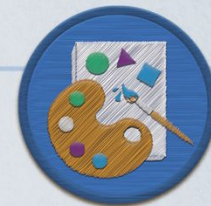| ACTIVITY NAME	DESCRIPTION
Wait	Sets an automation to wait for a specific duration, or until a specific time, before continuing.
Verification	Helps avoid unintended automation outcomes by letting you set conditions for a data extension used in the automation, and notifying you, stopping the automation, or both if the conditions are met. This activity also shows results of the latest run on hover and can be used for logging in an automation.

This will help ensure that your activities only fire when you want them to!

Getting your data in...

ACTIVITY NAME	DESCRIPTION
Import	Updates a subscriber list or data extension using an external file. You provide information to create an import definition, which gives import file details and the import activity's behavior while running. To access Salesforce Objects and Reports, navigate to Interactions in Email Studio.

File needs to be in a CSV format. Often the file will be on the FTP site.

Pretty easy so far, right?

The activities that wear multiple hats...

ACTIVITY NAME	DESCRIPTION
File Transfer	Unzips or decrypts a file found in the Marketing Cloud's Enhanced FTP directory or to securely transfer files from the Marketing Cloud's secure file transfer location (Safehouse) to an FTP location.
Data Extract	Creates a file to use outside of the application. This activity can also be used to transform an XML file to a comma-delimited, tab-delimited, or pipe-delimited file for import into your account.

These are the big hitters...

Let's break that down...

File Transfer

Manage File
To unzip or decrypt a file found in the Marketing Cloud's Enhanced FTP directory.

Move a File from Safehouse
To move a file from the Marketing Cloud's secure file transfer location to a designated FTP location.
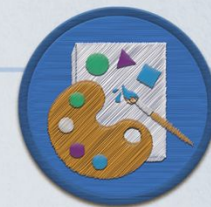
Data Extract

Creates one or more zipped files for your use outside the Marketing Cloud application.

Converts an XML file into a comma-delimited, tab-delimited, or pipe-delimited file for import into your account.

This is where Vicki is going to talk about her high school calculus teacher again... Pot's on the table!

In case that wasn't enough...

ACTIVITY NAME	DESCRIPTION
Script	Executes your Server-Side JavaScript to accomplish tasks in an email or landing page.
Report Definition	Defines the parameters for running a report one time to be used every time the report is run using the activity. Create a report activity to run any available standard report in the application or custom reports in your account.

Don't worry - you don't need to know Server-Side JavaScript to be an Email Specialist. Just know it's there to pass the news on to your friendly, neighborhood Marketing Cloud Developer!

Error Handling

Stay informed

Set notifications

- For when a run completes.
- For when a run fails.

*You can set notifications for more than one email address.

Advanced Run Once

- Lets you decide which activities to rerun when an automation fails.

When setting the notifications, go ahead and add a note so that the receivers know more about what they should do in case of an error. Maybe a key point of contact or a link to some helpful documentation...

What can you do with an automation?

- Run once.

- Activitate.

- Delete.

- Pause.

Quiz time!

Question 1

There is an automation that imports a file, runs a query activity to join the incoming data with system click data and then injects the data into the journey. The query fails. What is the result?

A. The automation returns the data that was queried before the error occurred and injects that data into the journey.
B. The automation stops at the query, sends a run failed notification and no data is injected into the journey.
C. The automation injects only the import data into the journey and skips the click data.
D. None of the above.

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D. None of the above.

Question 2

A marketing team needs to create a segmented audience based off criteria that is refreshed every Monday morning in order to send a Monday Newsflash email. The email is being sent through Email Studio. What type of automation should the team create?

A.   Scheduled starting source with a filter activity.
B.   Scheduled starting source with a query activity.
C.   File drop starting source with a filter activity.
D.   File drop starting source with a query activity.
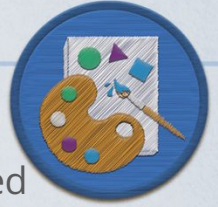
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B. Scheduled starting source with a query activity.
C. File drop starting source with a filter activity.
D. File drop starting source with a query activity.

Trailblazer
COMMUNITY

Question 3

A marketer needs to make an update to a running automation. How should he/she/they go about doing so?

A. Stop the previous automation. Clone the original automation and make the changes in the cloned version. Activate the cloned version when the changes are made.

B. Create a new version of the running automation. Make the changes in the new version and activate.

C. Make the changes in the running automation. They will automatically be taken into account for the next run.

D. Pause the active automation. Make the necessary changes. Reactivate the paused automation.

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Question 4

Alicia's Avocadoes needs to run a daily import when their POS system places a zip file lands in the FTP folder. The data is then joined with bounce data to be injected into a journey.

A. Scheduled starting source -> File Transfer -> Import Activity -> Query Activity -> Journey Entry Source
B. File Drop staring source -> Data Extract -> Import Activity -> Filter Activity -> Journey Entry Source
C. File Drop staring source -> File Transfer -> Import Activity -> Query Activity -> Journey Entry Source
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D.   Scheduled starting source -> Data Extract -> Import Activity -> Filter Activity -> Journey Entry Source

Question 5

Lucy's Lollipops needs to segment an audience on an ad-hoc basis for a batch send. They only use the target audience 3 or 4 times a year max. Which tool should they use?

A. Query activity in Automation Studio
B. Filtered data extension in Email Studio
C. Data FIlter in Email Studio.
D. Filter Activity in Automation Studio.
E. Journey Builder Entry Source.

Question 5

Lucy's Lollipops needs to segment an audience on an ad-hoc basis for a batch send. They only use the target audience 3 or 4 times a year max. Which tool should they use?

A.   Query activity in Automation Studio
B.   Filtered data extension in Email Studio
C.   Data FIlter in Email Studio.
D.   Filter Activity in Automation Studio.
E.   Journey Builder Entry Source.

Trailblazer Community Groups

salesforce

Thank You!

Let's succeed together!