A Comprehensive Guide to Configuring SFDC & SFMC for Noodle Partners' Various BUs

by Steven Tey

Table of Contents

How to Configure Business Units (SFDC & SFMC)

Protip

Remember to log into incognito when you configure SF BUs so that you don't accidentally log into a different instance and start doing work there.

We will also need to know what account do we want to use as the integration user between SFMC and SFDC (usually it's the IT Partners/Service Desk acc, we will need the credentials for that)

Step 1: Installing the connector

- Download the package: https://sfdc.co/MCC
- Log into your BU SF account to access the page
- Click on "Install for all users"
- Check the "Yes, grant access to these third-party websites" box
    - Note: This might take 5 mins
    - Note: The package will deploy automatically upon download

Step 2: Change user layout

- Go to Sales Cloud in Lightning View
- Setup (top right corner, service wheel icon) > Object Manager > Users > User Page Layouts
- Add the following:
    - Marketing Cloud for AppExchange User
    - Marketing Cloud for AppExchange Admin

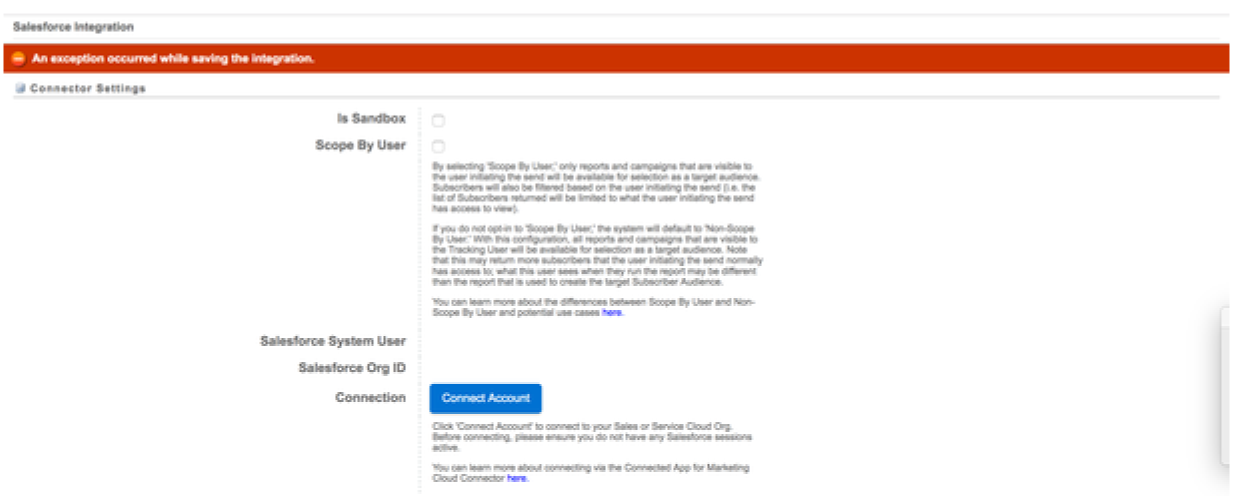
Step 3: Give yourself Admin Access

- Go to Users, find your username, click on it
- Enable admin access by checking the options for "Marketing Cloud for AppExchange User" and "Marketing Cloud for AppExchange Admin"

Step 4: Connect the two clouds (Sales & Marketing Cloud)

- Go to Marketing Cloud, click on "Setup"
- Under "Platform Tools", select "Apps" > Salesforce Integration
- Check "Scope By User"
- Click "Connect Account"
    - Click "OK"
- Click "Allow Access"

Note: Here, you might encounter an integration error as shown in the screenshot below:



In that case, refer this document to resolve the error.

Step 5: Make sure that our marketing cloud user is our SF user

- Under “Administration, click on “Users” > Users
- Select your username that now has admin access
- Click on “Integrate”
  - Note: The Marketing Cloud user performing this integration needs to be an API user, or else there will be an error message.
  - If you want to perform tasks that require API calls, you have to be an API user (import email campaign reports from Sales Cloud to Marketing cloud, or to do Salesforce email sends).
- Input SF Username
- Click “Save Settings”

Note: You might encounter the following error at this step:

- To resolve this, make sure that there is no Salesforce Integration with another user - in this case, if you want hpearce@noodle.com as the SF integration user for that particular BU, you shouldn't have another user as the integration user as well.

Step 6: Configure Authorization Policies

- Go back to Sales Cloud
- Go to Apps > Connected Apps > Manage Connected Apps
- Click on "Salesforce Marketing Cloud"
- Edit Policies
- Under OAuth Policies, change the setting for “Permitted Users” to “Admin approved users are pre-authorized”.
- Under IP Relaxation, select “Relax IP restrictions”
- Under Refresh Token Policy, select “Immediately expire refresh token”
- Click “Save”

Step 7: Set up Permission Sets

- Go back to Users > Permission Sets
- Click on “New”
- Enter a label (anything that looks good, i.e. “Marketing Cloud Connected App”)
- Click “Save”

Step 8: Add Assignments to the Permission Set

- Click on “Manage Assignments”
- Click on “Add Assignments”
- Assign all users who will be using SFMC to permission sets

Step 9: In the Sales or Service cloud, click Setup.

- Select the "Manage Connected Apps" option on the side bar.
- Click Salesforce Marketing Cloud.
- Click Manage Permission Sets.
- Select the newly created permission set. (created in Step 7)
- Save changes.

Step 10: Set field level security (for Lead & Contact)

- Go to Object Manager > Lead > Fields & Relationship
- Edit “Email Opt out”
- Click on “Set Field Level Security”
- Make sure that field level security is visible to everybody
- Click “Save”
- Go back to Object Manager > Contact > Fields & Relationship

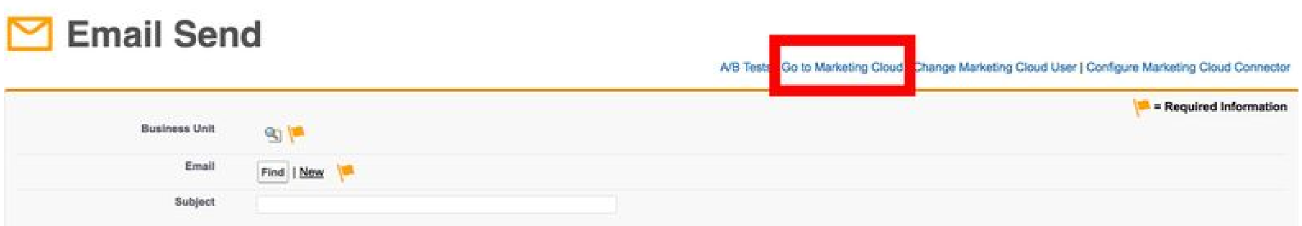
- Edit “Email Opt out”
- Click on “Set Field Level Security”
- Make sure that field level security is visible to everybody
- Click “Save”

Step 11: (Optional) Updating contact page layouts

- We are not letting anyone (i.e. Enrollment Advisors) access Contacts

Step 12: Marketing Cloud Connector Setup

- Go to App Launcher, select “Marketing Cloud”
- Click “Verify Remote Site” > “Okay”
- Click on “Start Wizard” > “Next”
- Click on “Configure Marketing Cloud Connector” > “Okay!”
- Click on “Connect to marketing cloud”
- Click “check” for everything (except “Alternate ‘Reply-to’ Options” & “Campaign Member Tracking”, don’t Enable those two)
- For "Marketing Cloud Deep Link Access", this allows users to access Marketing Cloud directly from Sales Cloud. If you enable it for admins, they'll have the option to log in to Marketing Cloud directly from Sales Cloud under email sends.



- Add your email for “Support Ticket Recipient”
- Don’t forget to click “Save”

Step 13 (Optional): Assign user to selected BU

Here, you should see the specific BU that you are working on listed on the dashboard. If you don’t see it, you will have to assign yourself to the particular BU with the following steps:

- In the Marketing Cloud, navigate to Email Studio.
- Click Admin   Click My Users   Select the Marketing Cloud API User.
- Click Manage Business Units at the top of the Users table.
- Ensure the selection under Default Business Unit is the top-level business unit.
- In the Associated Business Units section, select all business units to be used with Marketing Cloud Connect.
- Save the changes to the Marketing Cloud API User.

At this point, you might encounter an error: Attempt to de-reference a null object.

This error usually arises when you don’t have an integrated user.

To resolve this error:

- Go to Marketing Cloud (SFMC)
- Click on Setup > Users > Users
- Click on your user account
- Check if “**Salesforce.com Status**” is “**Integrated**”

If this doesn’t help, sometimes a hard refresh - a logout, log in - would fix it.

- Log out of SFMC
- Log out of SFDC
- Login to both again

Step 14: Business Unit Management

- Click on the business unit you wanna set up, and click “save”

This is also a pretty good guide on the whole process.

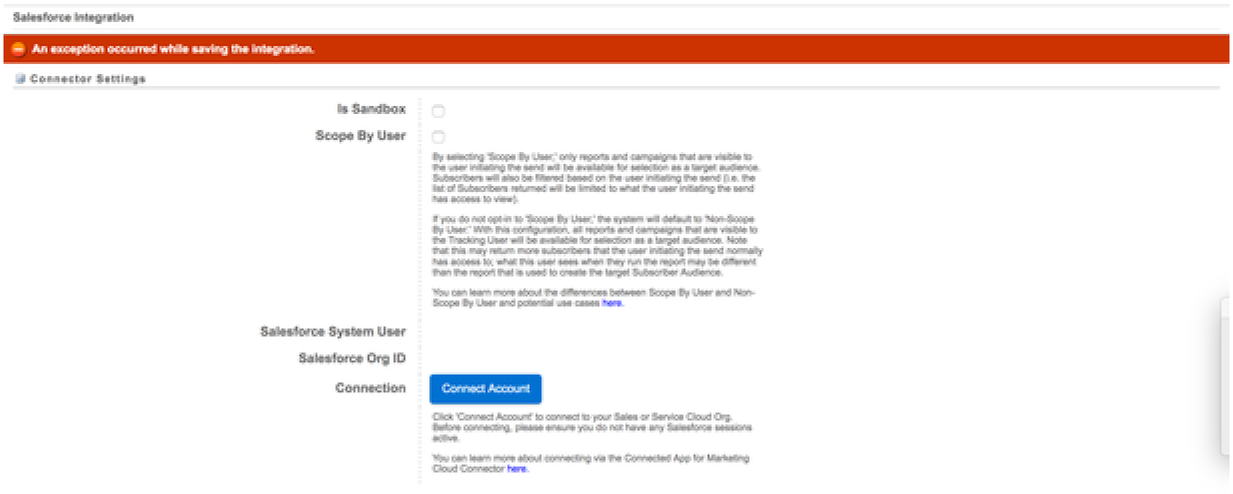
How to Resolve SFDC-SFMC Integration Error

Context

This error started when I tried to set up the Journey Builder for one of our business unit's - when I was trying to fill in the entry sources, an error saying that there were "problems retrieving the integration user" appeared, and I was unable to proceed to the next step.

Confused, I proceeded to check if the user was given access to both the Marketing Cloud Connect Admin & the Marketing Cloud Connect User permission sets. It was.

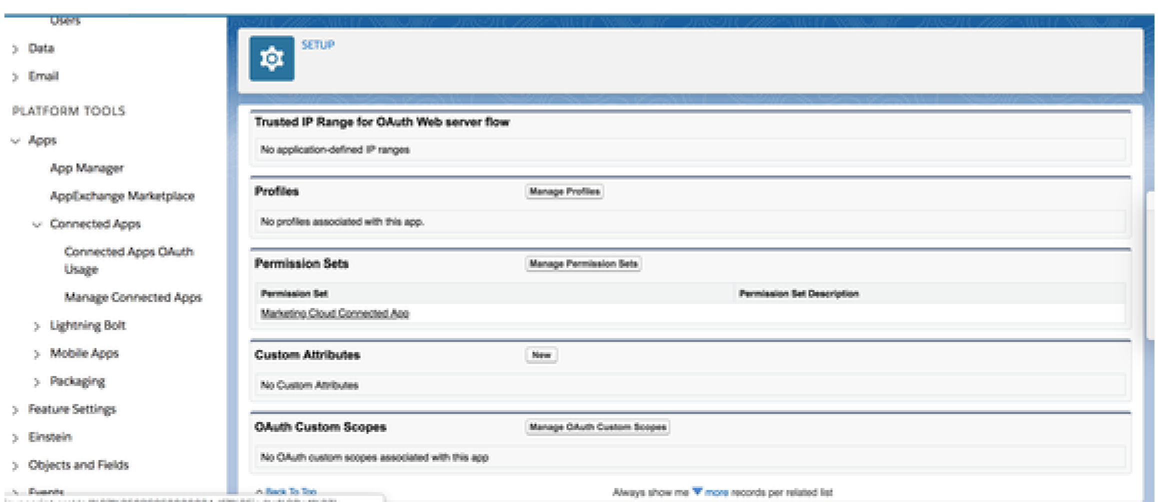
Even more confused now, I checked with Harry Pearce, and he told me that this could be due to fact that both the Marketing and Sales Clouds for that particular business unit was not integrated. To resolve that, I followed the instructions on this document, but was met with an error message as I tried to establish the Salesforce Integration:



From this point on, I was unable to resolve this connection issue, until I got on a call with a technical person from Overground who helped resolve the issue effortlessly.

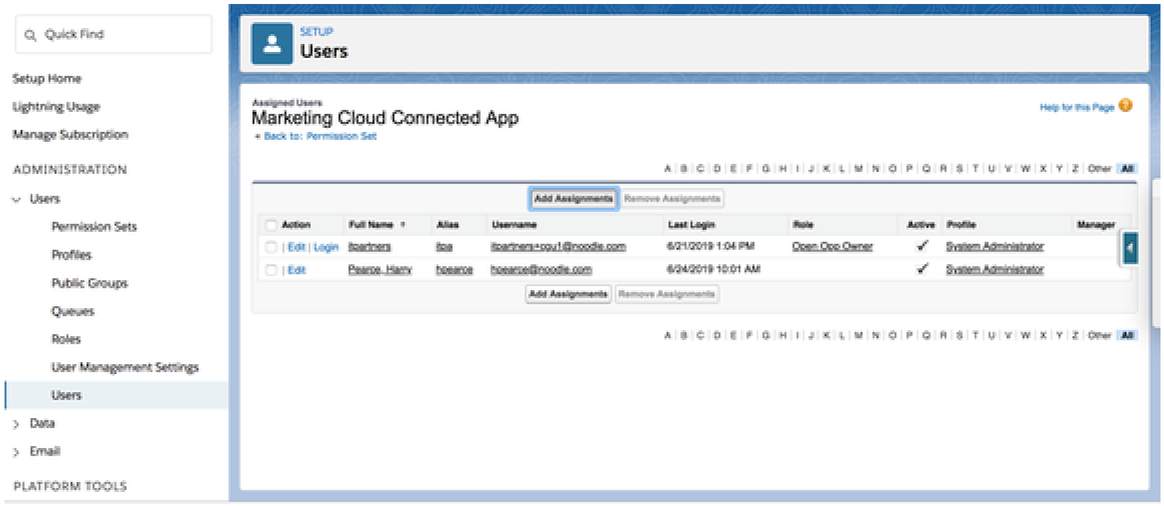
How to Fix This Error

1. Enable "Marketing Cloud Connected App" permission set
    a. Login to Sales Cloud to the specific instance (e.g. CGU) using a system admin acc
    b. Go to Setup > App > Connected Apps > Manage Connected Apps
    c. Select Salesforce Marketing Cloud > Manage Permission Sets



2. Make sure that the user you wanna use to form the connection is given permission to “Marketing Cloud Connected App”

a. Still in Sales Cloud, go to Setup > Users > Permission Sets
b. Click on "Marketing Cloud Connected App"
c. Click on "Manage Assignments"
d. Click on "Add Assignments"
e. Select the user you want to assign this permission set to, and click "Assign".



3. Also don't forget to make sure that the user has access to Marketing App Connect Admin and Marketing App Connect User
   a. To do this, in Sales Cloud, go to Setup > Users > Users
   b. Select the user that you wanna use and check under Additional Information for the boxes "Marketing Cloud for AppExchange User" and "Marketing Cloud for AppExchange Admin" to see if they are checked off or not. If not, check those two boxes.

4. Then, when you are done with these two steps, you should be good to go
   a. Login to Marketing Cloud (it doesn't matter which account you use to login with).
   b. Navigate to the instance of the particular business unit.
   c. Go to Setup > Apps > Salesforce Integration
   d. Now, you should be able to establish the integration between Salesforce Marketing Cloud and the Salesforce Sales Cloud for a particular business unit.

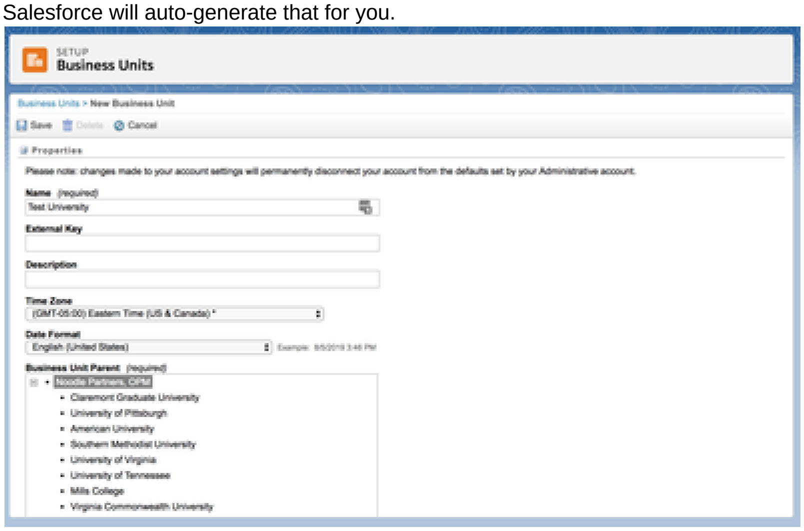
How to Create Business Unit on Marketing Cloud

To do this, you will need the following:

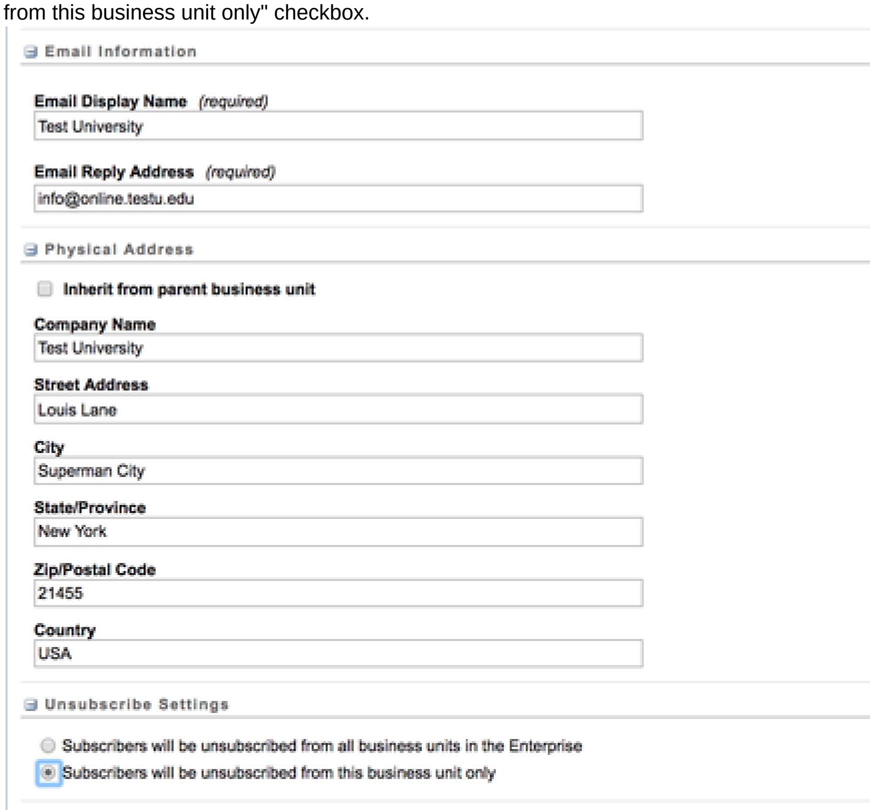
- Email Display Name (usually it's just the name of the university)
- Email Reply Address (we are currently using the same format for all BUs, i.e. *info@online.uni.edu,* where "uni" is the university acronym)
- Physical Address (can usually find it with a simple Google Search)

Steps

1. In Marketing Cloud, go to Setup.
2. On the left menu bar, select "Business Units"
3. Click "Create"
4. Type in the name of the university and select the Business Unit Parent (Noodle Partners, OPM). Leave the "External Key" field blank; Salesforce will auto-generate that for you.



5. Fill in the remaining sections according to the information that you got earlier. Don't forget to check the "Subscribers will be unsubscribed from this business unit only" checkbox.

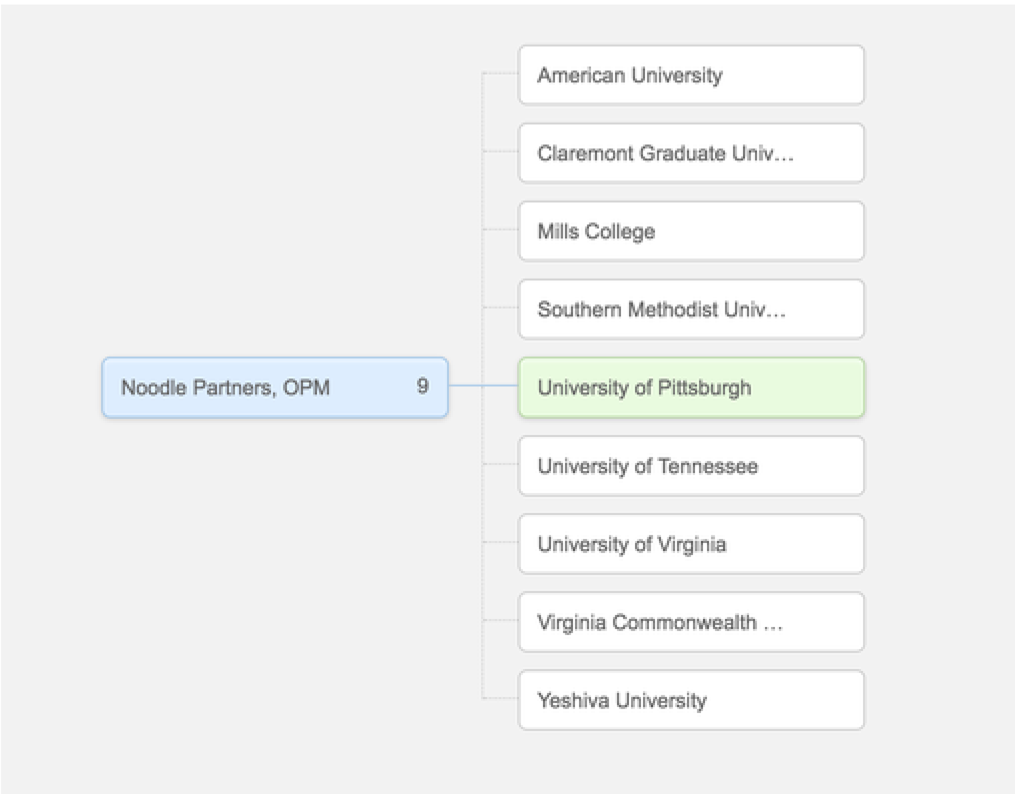


6. Click "Save"

How to Set Up Data Extension/Filter Automation For SFMC Child BUs

Introduction

Currently, the architecture of our business units on SFMC is set up in such a way that every university is represented by one business unit in Salesforce Marketing Cloud (SFMC).



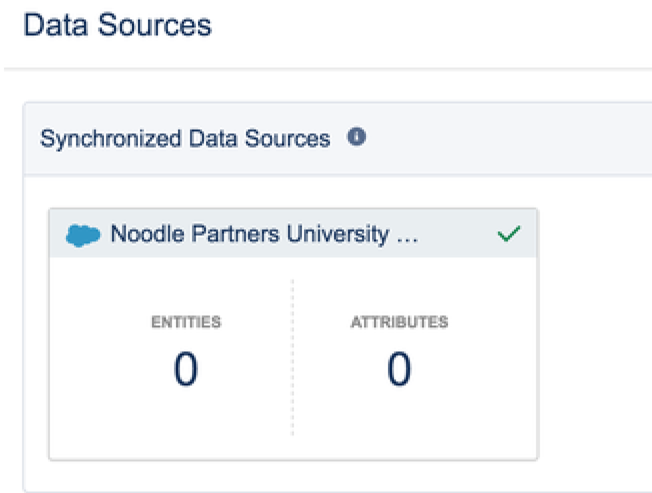
As you can see, the business unit highlighted in this example is the University of Pittsburgh. However, some universities might have multiple schools/programs under its wing. To customize the ***Email Display Name*** and the ***Email Reply Address*** of the emails we send out to each school/program, we will set up unique sender profiles for each. Refer this doc for more information about how to set up sender profiles.

Also, with this type of business architecture, we need to find a way to segment the data that is coming from Sales Cloud into Marketing Cloud, as we wouldn't want to set up the same email drip campaign for two different program/schools, despite them being under the same university. In other words, we want to avoid sending the same marketing email to leads from different programs/schools.

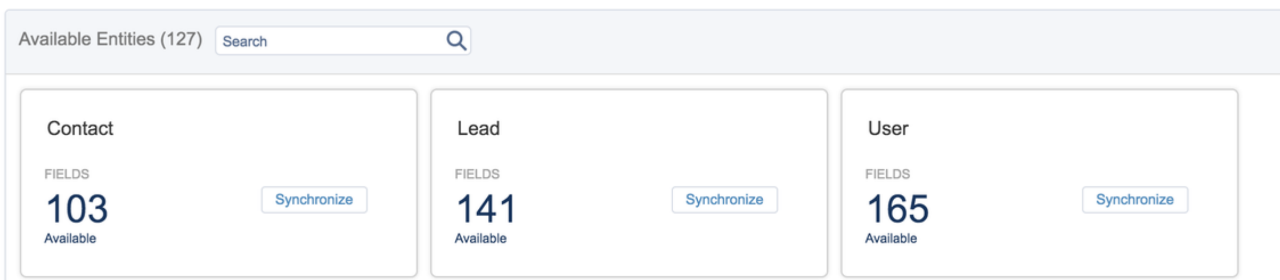
Therefore, this guide will teach you how to segment the data from Sales Cloud using data filters + data extensions.

Step One: Synchronize the Data Between Sales Cloud and Marketing Cloud

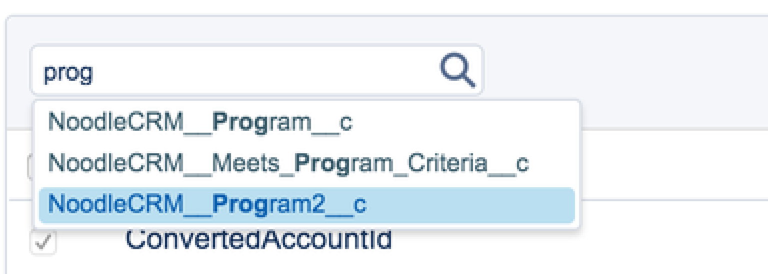
1. Under Audience Builder, navigate to Contact Builder.
2. From the menu bar above, go to "Data Sources".
3. Select "Synchronized".
4. Click into your business unit. In this case, we are selecting the "Noodle Partners University BU"



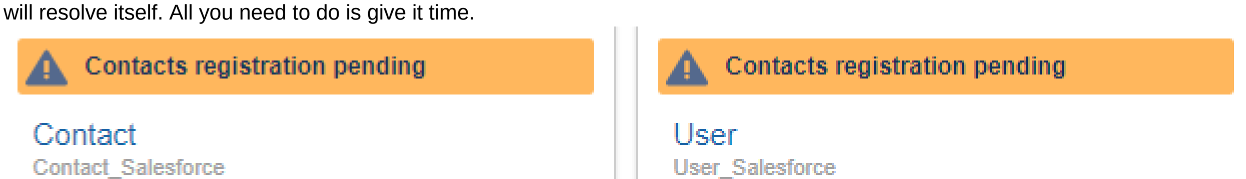
5. At the top right part of the page, click the "Set Up Object" button.
6. Select the entity that you want to synchronize. In most cases, we usually start with Lead, Contacts, and Users, before moving on to Opportunities and Programs.



7. Click on the "Synchronize" button under Lead.
8. Then, we will have to select the fields to synchronize into this account. Remember to select three fields:
   a. NoodleCRM_Program2_c
   b. FirstName
   c. Name



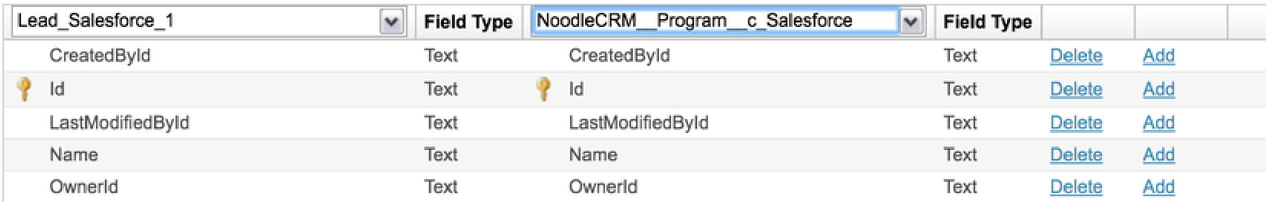
9. Click "Next"
10. Select the "All records with an email address" option.
11. Click "Save and Synchronize".
12. Now sit back, and wait until all the "Lead" data gets imported from Sales Cloud to Marketing Cloud.
13. Note: Sometimes, you might come across the "Contacts Registration Pending" error, as seen in the screenshot below. Fret not, the error will resolve itself. All you need to do is give it time.



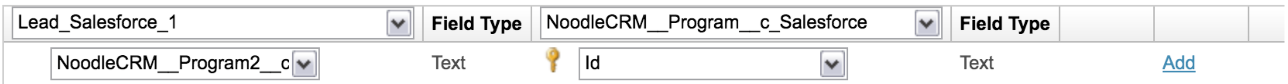
14. Repeat the same steps for the User, Contacts, Opportunities and Programs.
15. Note: In some cases, you might have to sync the "NoodleCRM__Program__c" entity as well, and when you do that, don't forget to include the "Name" attribute.

Step Two: Create Data Relationship

1. Under Email Studios, select Email. From the menu bar, go to the "Subscribers" drop-down menu, select "Data Relationships".
2. Click "Create".
3. Name the data relationship. If we are creating a data relationship between the Leads and the Program, we will name the data relationship as "Leads_Program_Relationship".
4. Then, we will select the "Lead_Salesforce" and the "NoodleCRM_Program__c_Salesforce" fields from the drop-down menus below. You should see something like this:



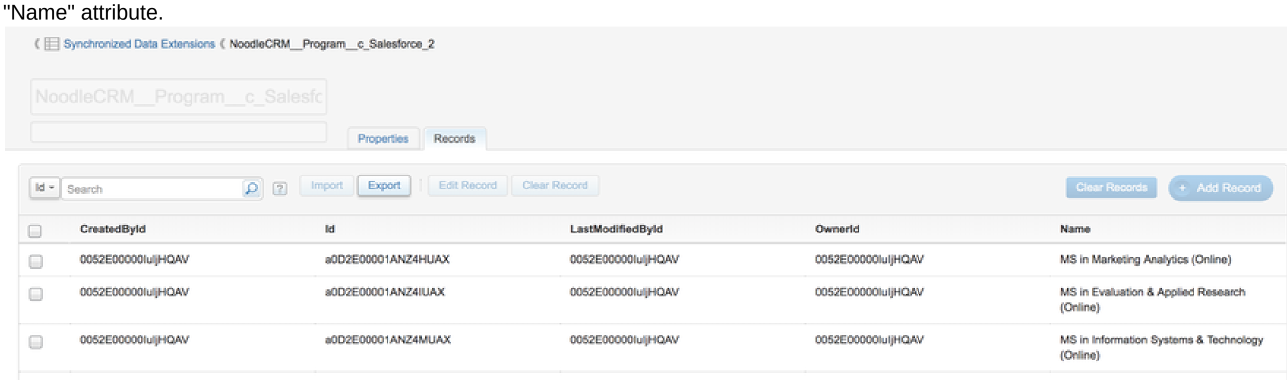
5. Delete all the fields except for ID.
6. On the left side of the ID line, change "Id" to "NoodleCRM_Program2__c_Salesforce".



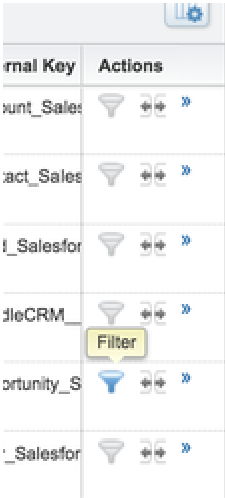
7. Click "Save".
8. This step is to help us decrypt the program ID for a particular program so that we don't have to memorize the long string of numbers and letters when we set up the data filter in the next step.

Step Three: Create the Data Filter

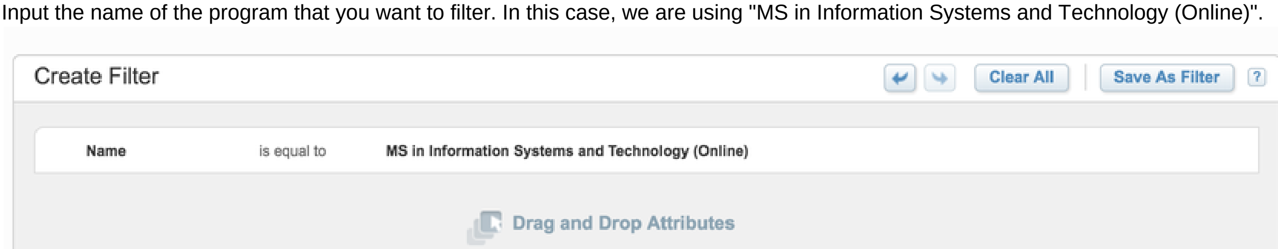
1. Now that the Data Relationship has been created, before we set up the filter, we have to determine the attribute that we want to match on.
2. Under Contact Builder, select Data Extensions. Go to "Synchronized Data Extensions", and then the "NoodleCRM__Program__c_Salesforce_2" Data Extension and select whichever program name that you want to filter by under the "Name" attribute.



3. Go back to Email Studios, under "Subscribers", select "Data Extensions", and then "Synchronized Data Extensions".
4. On the right-hand of the screen, click on the filter icon.



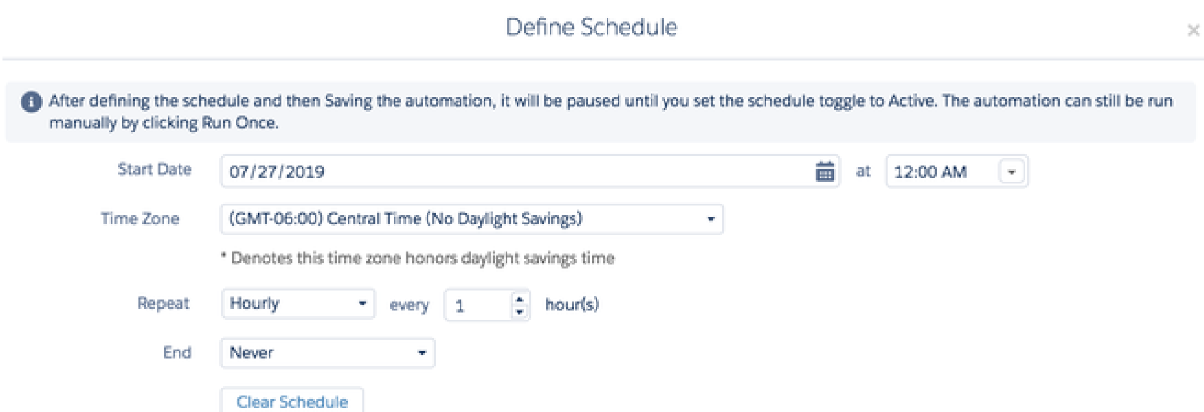
5. On the left sidebar, find the attribute "Name". Drag and drop the attribute from the left sidebar to the center.
    a. Note: Be careful not to choose the wrong "Name" attribute - it has to be the one from the first dropdown, not the second dropdown.
6. Input the name of the program that you want to filter. In this case, we are using "MS in Information Systems and Technology (Online)".



7. Click "Save As Filter".
8. Input the name of your Data Filter, the location, and click "Save". In this case, we are using "MS in Information Systems and Technology Online".

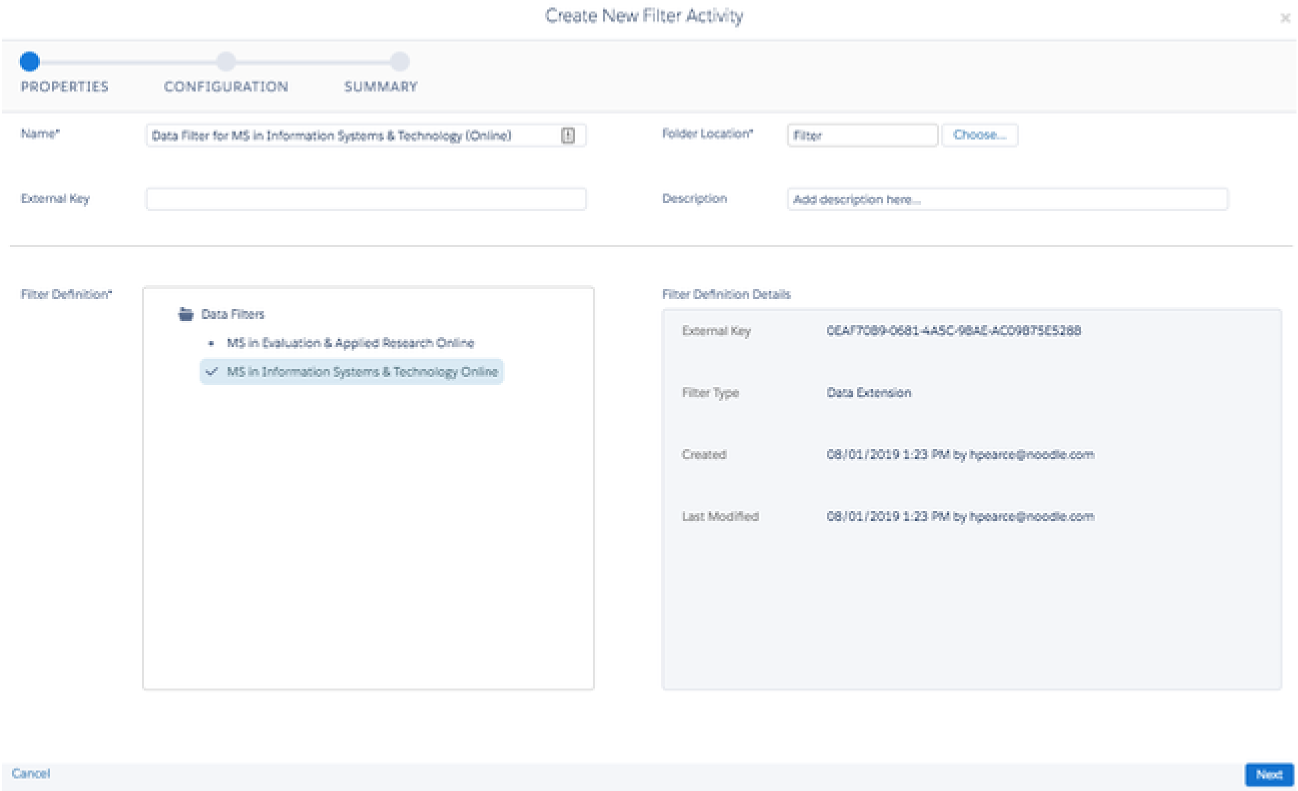
Step Four: Automating the Data Filter Refresh and Creating the Final Data Extension

1. Under Journey Builder, go to "Automation Studio".
2. At the top right corner, select "New Automation".
3. For the Starting Source, drag and drop the "Schedule" module from the left menu bar.
4. Click "Configure"
5. Define the Automation Schedule
    a. Start Date: Must be any date in the future
    b. Time Zone: Put your local timezone
    c. Repeat: Select "Hourly"
    d. End: Select "Never"

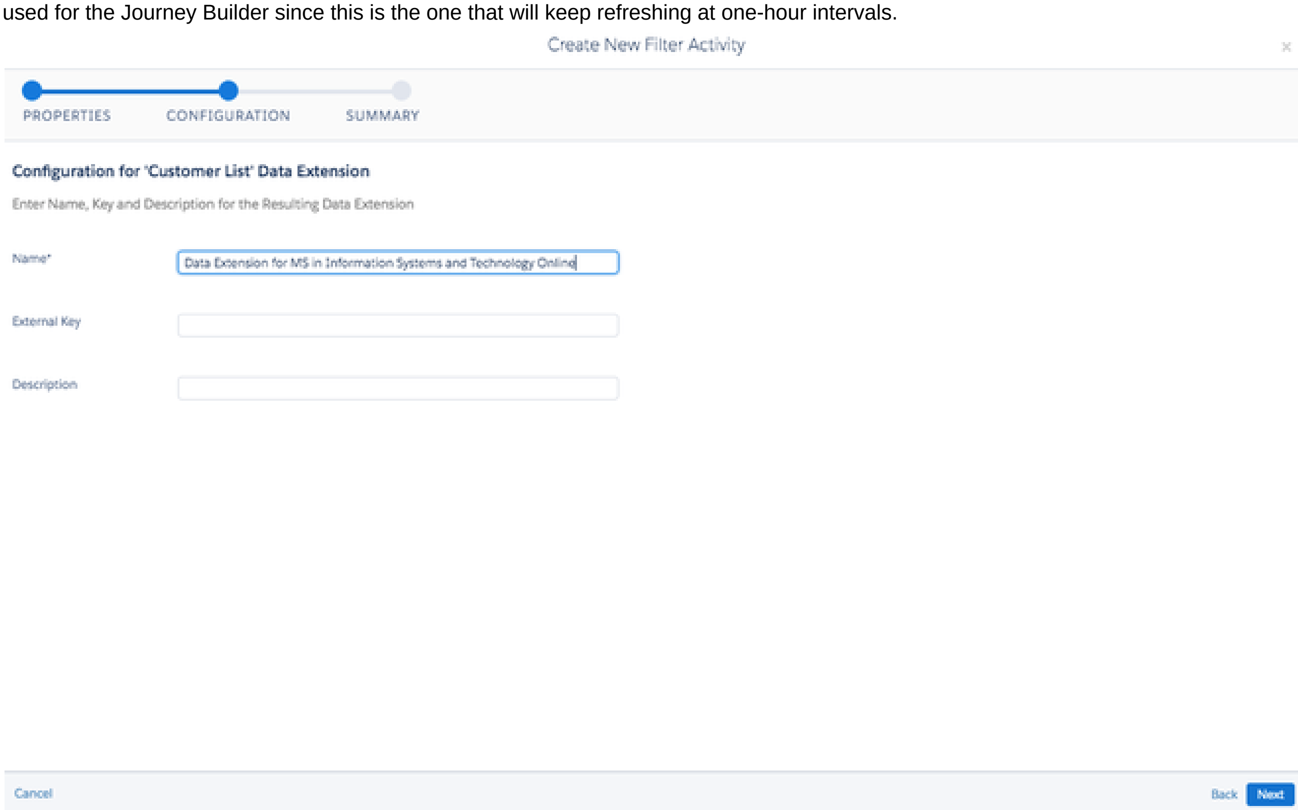


6. Drag and drop the "Filter" module into the canvas.
7. Click "Choose".
8. Click on "Create New Filter Activity"

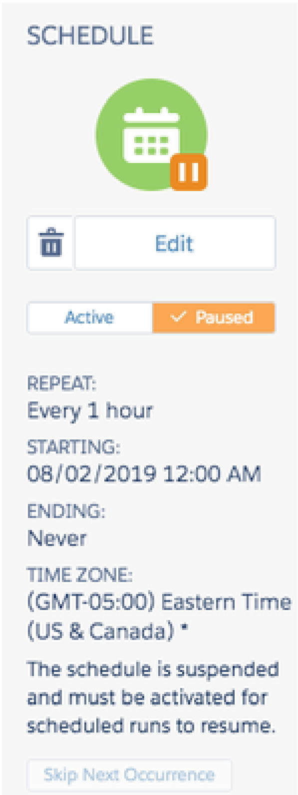
9. Key in the name, select the filter that you created from the previous step.

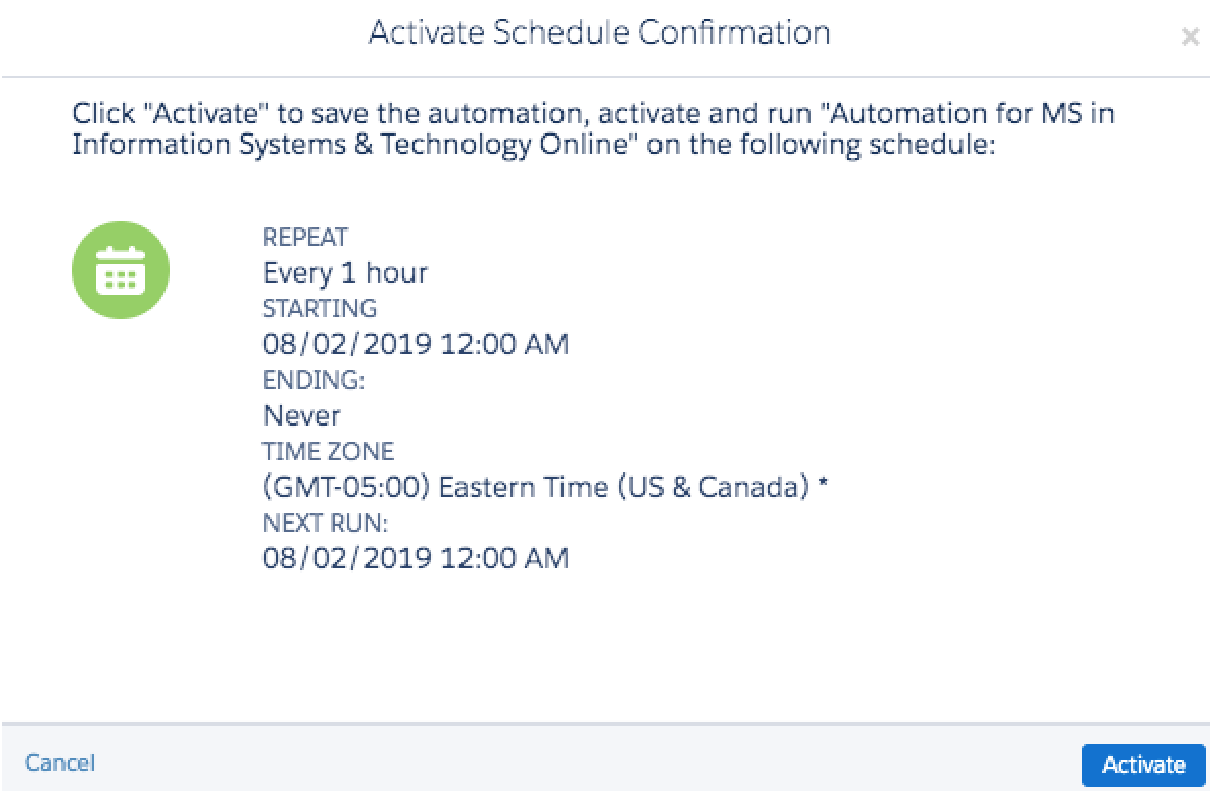


10. Click "Next".
11. Here, you'll need to create a data extension that will be stored in the Synchronized Data Extension folder. This data extension will be used for the Journey Builder since this is the one that will keep refreshing at one-hour intervals.



12. Click "Next", and click "Finish".
13. Click "Save".
14. On the Schedule module, click "Active", and then click "Activate"



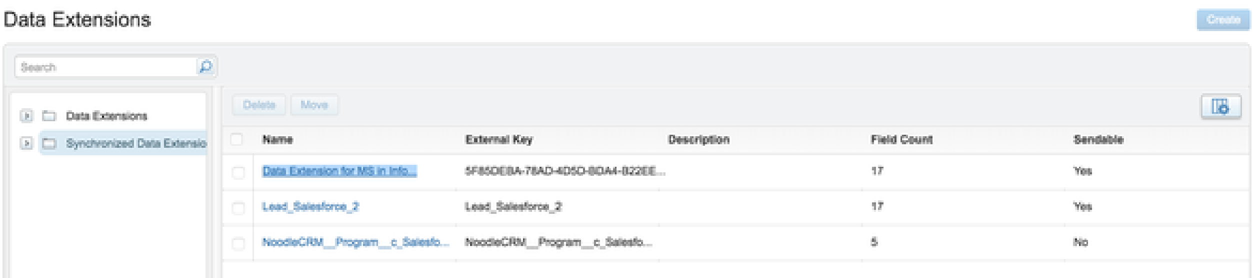


In short, we are setting up the automation which refreshes the data filter every hour to make sure that the data extension (which we created from the data filter) will receive new leads every time it gets entered into the system.

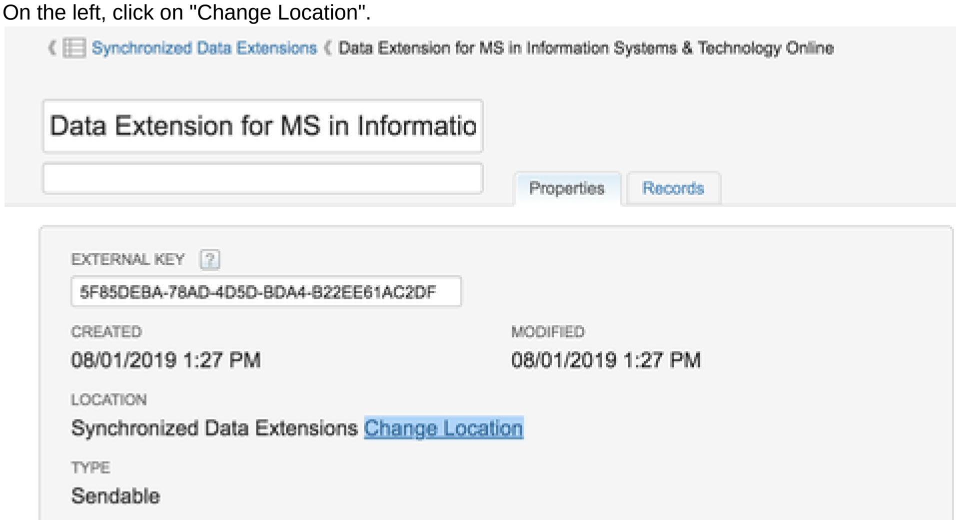
Step Five: Moving the Data Extension

In order for us to set up a journey in Journey Builder, we can only use data extensions that are in the Data Extension folder and not the Synchronized Data Extension folder. Therefore, since the data extension we created in Step Four ended up in the Synchronized DE folder, we will have to move it from the Synchronized DE folder to the DE folder.

1. Go to Contact Builder.
    a. Note: You will be able to access the DE in Email Studio, but for some weird reason, you won't be able to change the location of the data extension in Email Studio.
2. From the top menu bar, select "Data Extension".
3. From the left menu bar, select "Synchronized Data Extensions".
4. Click into the data extension that you made earlier. In this example, we are selecting "Data Extension for MS in Information Systems and Technology Online".



5. On the left, click on "Change Location".



6. Change the location from "Synchronized Data Extension" to "Data Extension".
7. Voila, you're done! Now all you gotta do is repeat steps Three to Five for the other programs under the particular university business unit and you'll be all set for the next step, which is setting up the email drip campaign in Journey Builder.

How to Set Up Email Drip Campaign

Preface

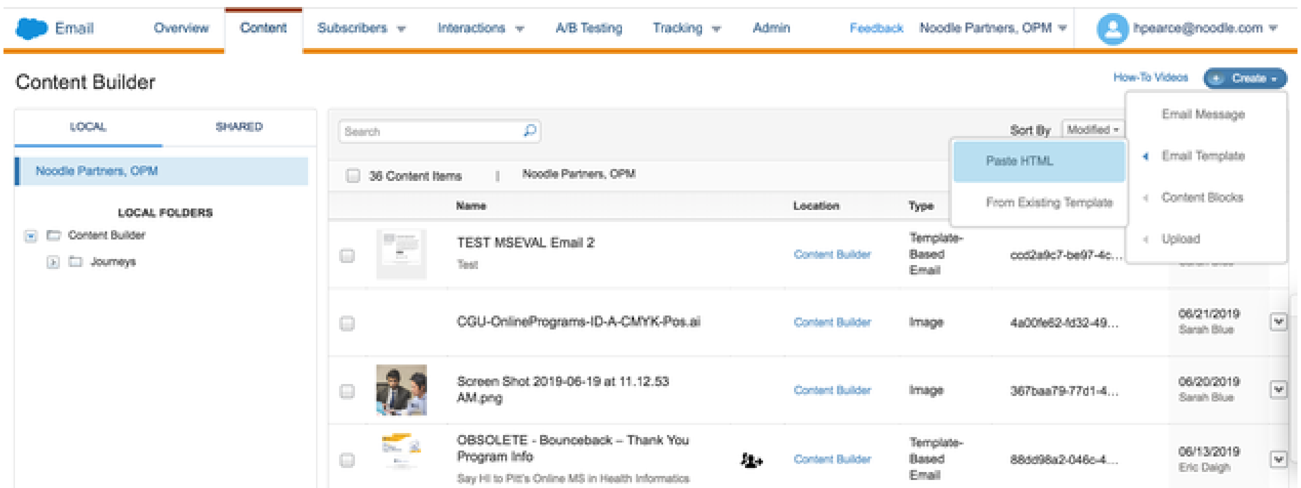
This document will serve as a tutorial on how to set up an email drip campaign for our business units using Journey Builder and Email Studio. There are several prerequisites to this tutorial:

- This tutorial is written with the assumption that the HTML code for the emails are already prepared and ready to go.
- The user in charge of setting up the email drip campaign needs to have full access to the Journey Builder, Email Studio, and Content Builder.

Steps

Setting up the Autoresponder Email

1. Go to Email Studio, from the top bar, click on "Content"
2. Hover on the "Create" button, go to "Email Template", and select "Paste HTML"



3. Paste in your HTML code
4. Click "Save", enter the name of the email template, and click "Save" again.

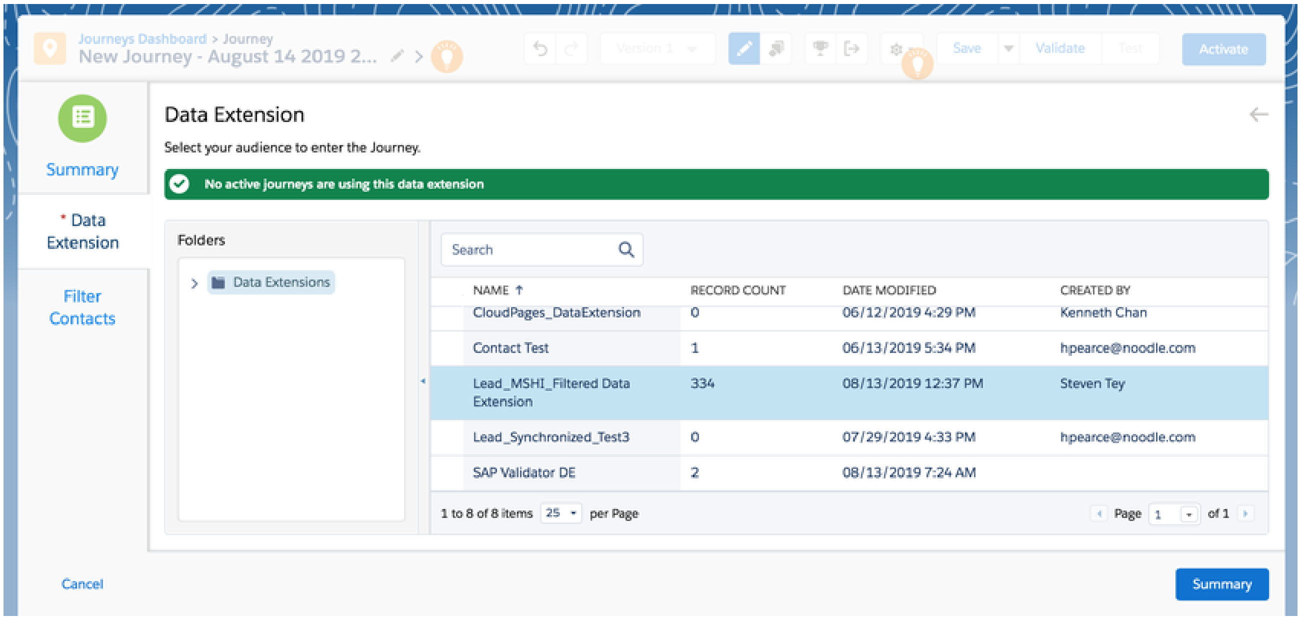
Setting up the Entry Source

Here, it might be worth noting that there are two different ways to set up the Entry Source - "Salesforce Data" and "Data Extension". Both have its pros and cons.

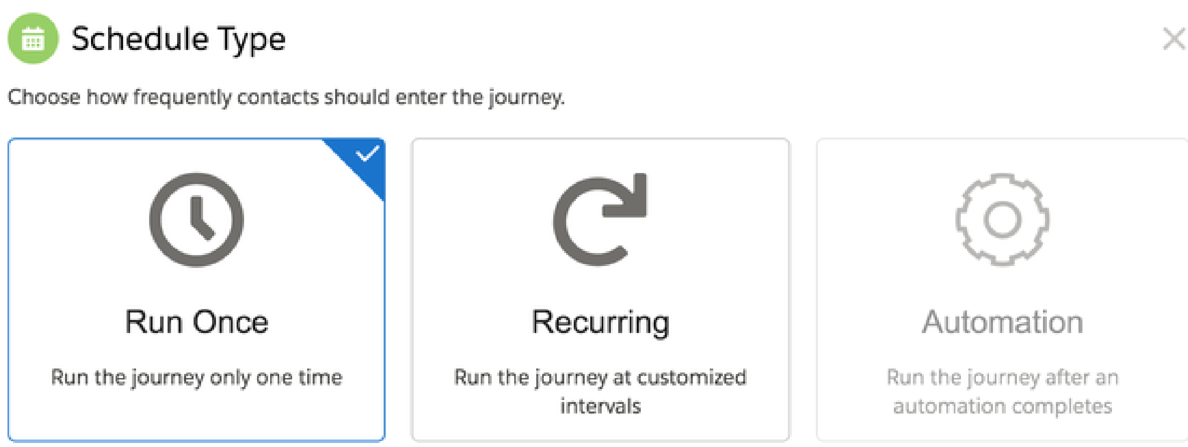
1. With Salesforce data you can trigger real-time emails and users will be injected into the journey immediately. while Filter Data Extensions is every hour at most
2. Salesforce Data will only evaluate users if their record is either updated or created. With a filtered Data Extension, you can target whoever you like without updating their record.
3. ***In most scenarios, we recommend using the "Data Extension" method.***

Data Extension

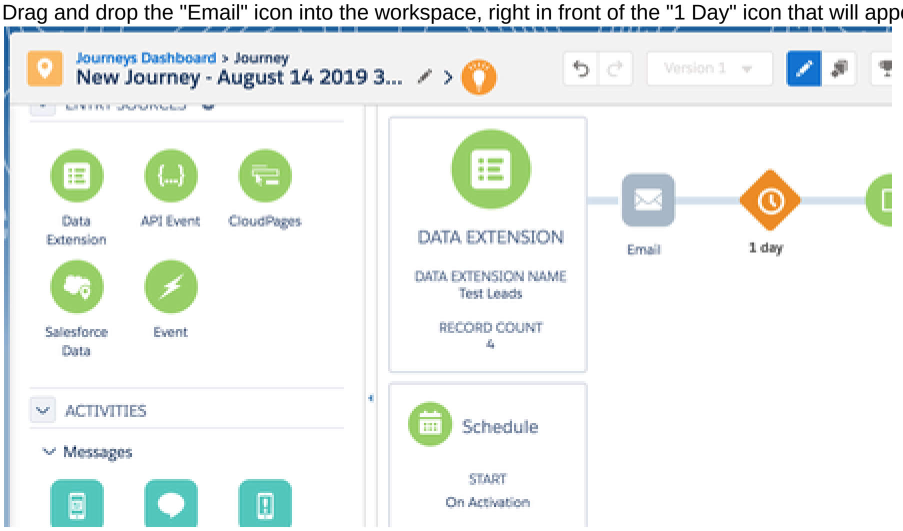
1. When selecting an entry source, drag and drop the "Data Extension" entry source into the Entry Source placeholder.
2. Select the Filtered Data Extension that you created earlier.



3. Click "Summary", then click "Done".
4. Set the schedule according to the following attributes:
    a. Schedule Type: Run Once



    b. Depending on your need, you can choose to run the journey upon activation or at a specific date and time.
5. Drag and drop the "Email" icon into the workspace, right in front of the "1 Day" icon that will appear.

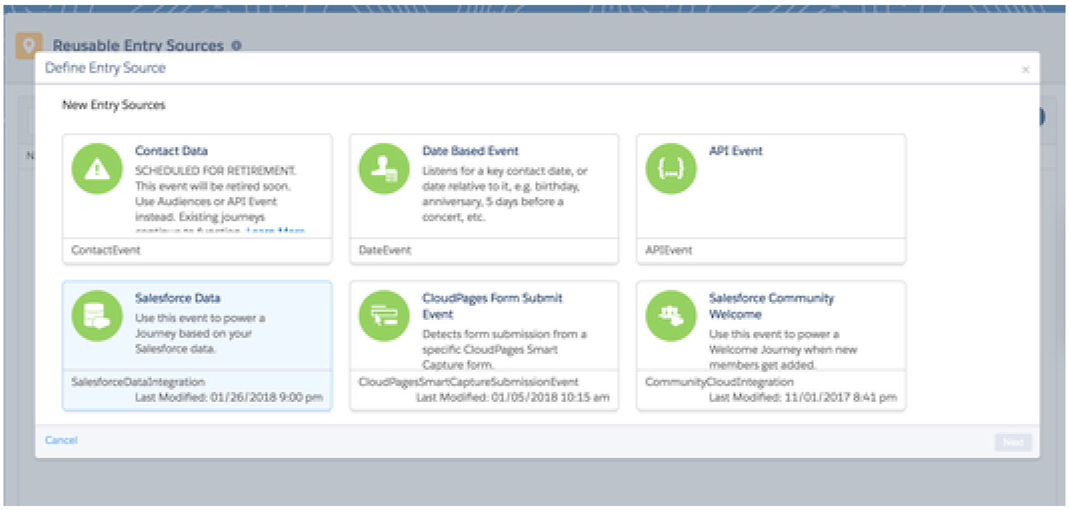


6. Click on the gray email icon, and click "Select Message".
7. Select the email template that you created in Content Builder.
8. Click on "Summary".
9. To test the email, click on "Preview and Test". Here, you can check if the merge fields within the email work, as well as send test emails

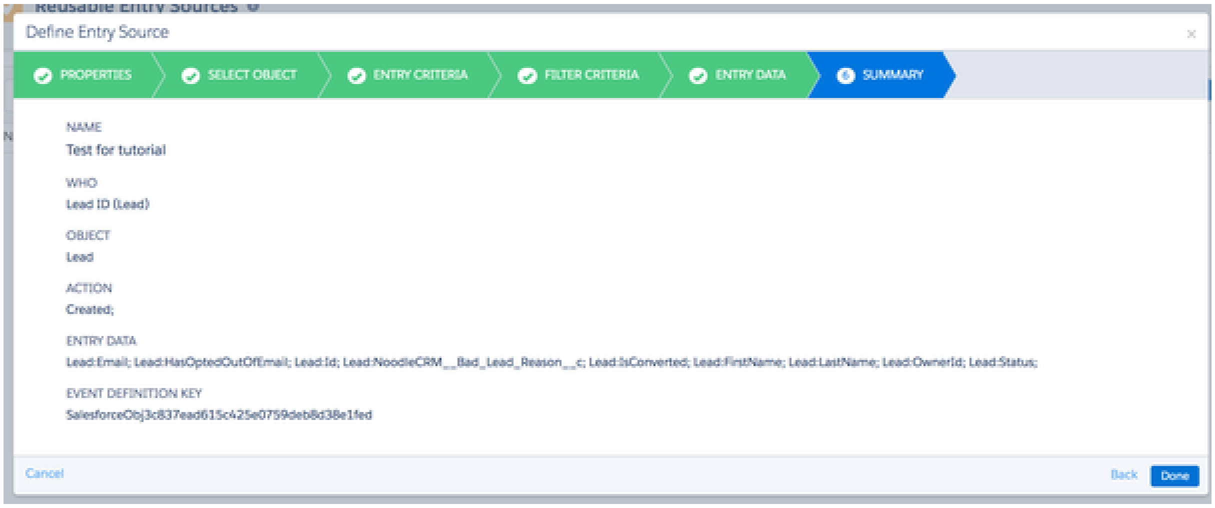
via a test data extension.
10. Otherwise, click "Done".
11. To add more emails within the drip campaign, repeat steps 5-10, while altering the number of days for the intervals by clicking on the clock icon and change the days from 1 day to 3 days or even up to 10 days.
12. Once you're done, click "Save", "Validate", and finally, "Activate".
13. That's basically it.

Salesforce Data

1. Go to Journey Builder, from the top bar, click on "Entry Sources"
2. Click on "+ New Event"
3. Under "Define Entry Source", select "Salesforce Data" - it's the one with the battery-cloud icon

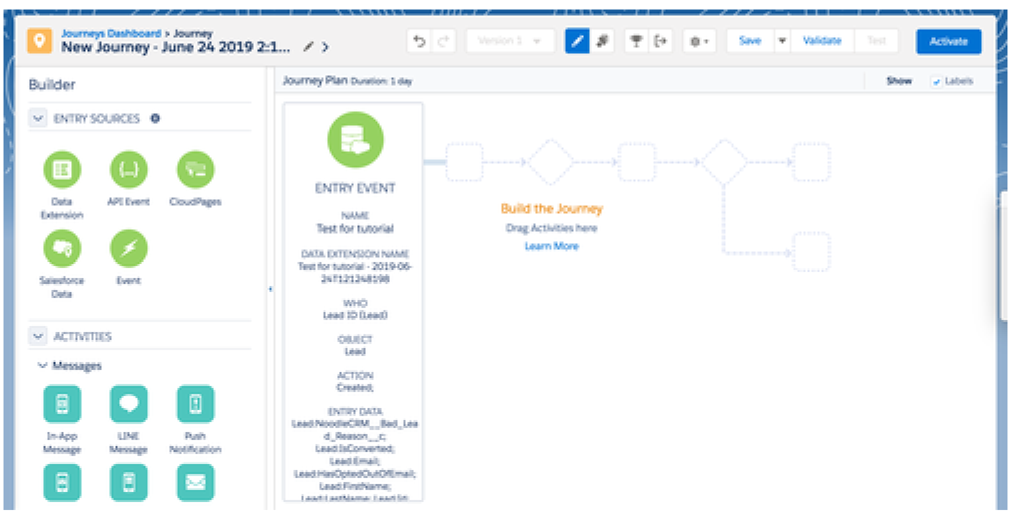


4. **Properties:** Add the name and the description of your Entry Source, and click "Next"
5. **Select Object:** Type in "Lead" into the search bar, click on it, and select "Lead ID (Lead)", and click "Next". This will be the entry under the "WHO" and "Object" section of the Data Extension
    a. Here, you might encounter an error that says "problems retrieving the integration user". To resolve that, refer this document.
6. **Entry Criteria**: Check the "Is Created" box, and click "Next". This will be the entry under the "Action" section of the Data Extension
7. **Filter Criteria:** You don't really need any filters at this stage, so just click "Next".
8. **Entry Data**: Here's where things get a little complicated. Make sure you select all of the following 9 Entry Data Fields before clicking "Next":
    a. Lead ID (should be pre-selected)
    b. Lead: Email (should be pre-selected)
    c. Lead: Email Opt Out (should be pre-selected)
    d. Lead: Bad Lead Reason
    e. Lead: Converted
    f. Lead: First Name
    g. Lead: Last Name:
    h. Lead: Owner ID
    i. Lead: Status
9. **Summary:** Your summary page should look a little something like this:



10. Click "Done". You should see your newly created entry source saved under "Reusable Entry Sources".

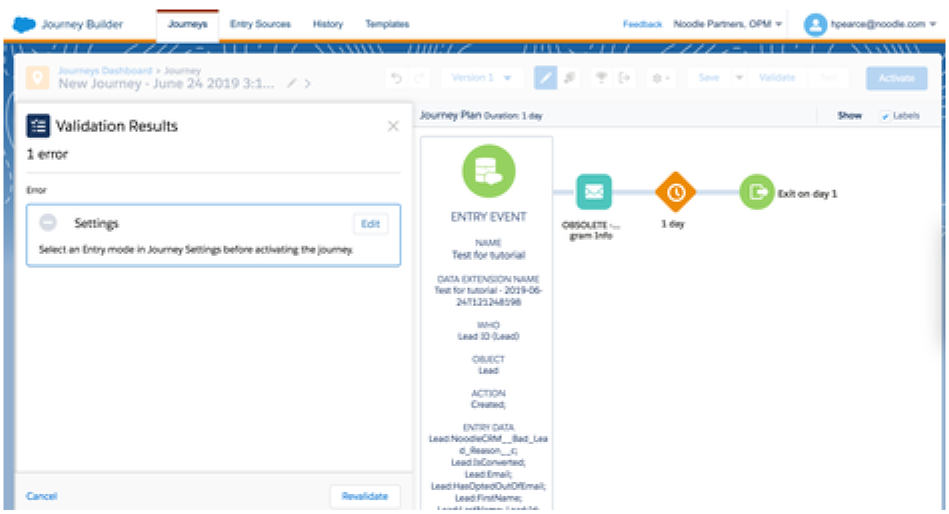
1. **Setting Up the Journey Builder**
    a. Go back to Journey Builder, hover on "Create New Journey" on the top right corner, and select "Create New Journey From Scratch"
    b. Drag the "Salesforce Data" from the left menu (it should be a green icon with a cloud and a location pin) into the "Start with an Entry Source" circle.
    c. Click on the icon.
    d. You should see your newly created entry source under "Existing Entry Sources". Select it.
    e. Click "Next" all the way till the end. Your newly created entry source should now fill the "Start with an Entry Source" circle and it should look a little something like this:



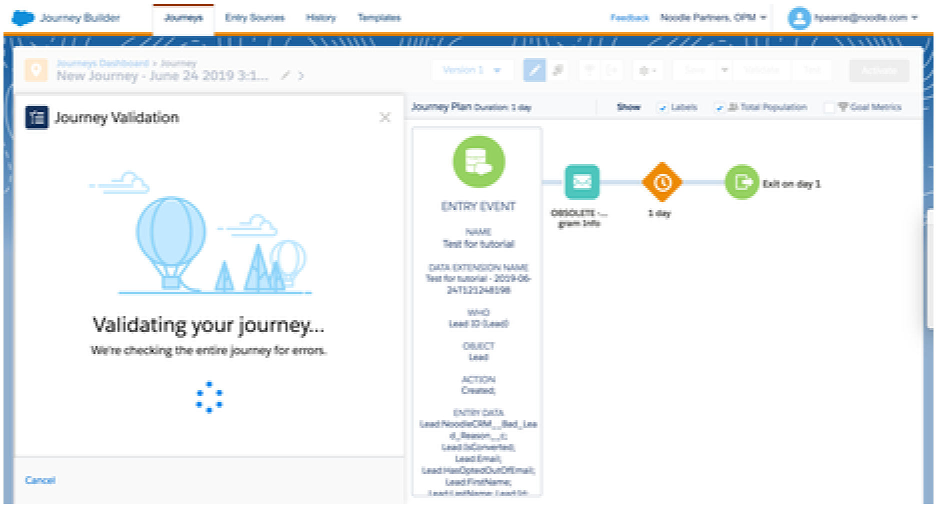
    f. Then, you will have to start building the journey. This depends on three different criteria:
        i. The duration of the campaign (could be 30 days, could be 120 days)
        ii. How many emails you want to send (7 - 12 emails)
        iii. The cadence of the emails (how much delay in between each email).
    g. Once you've dragged the "Email" icons in place, the time delay icons will automatically appear between each email - you will only have to click on them to customize the amount of time between each email.

h. To insert the emails, click on the gray email icon, click "Select Message"
i. Under "Message Definition", select the Email HTML template that you made earlier.
j. Go to "Summary", check if everything is in place, and click "Done".

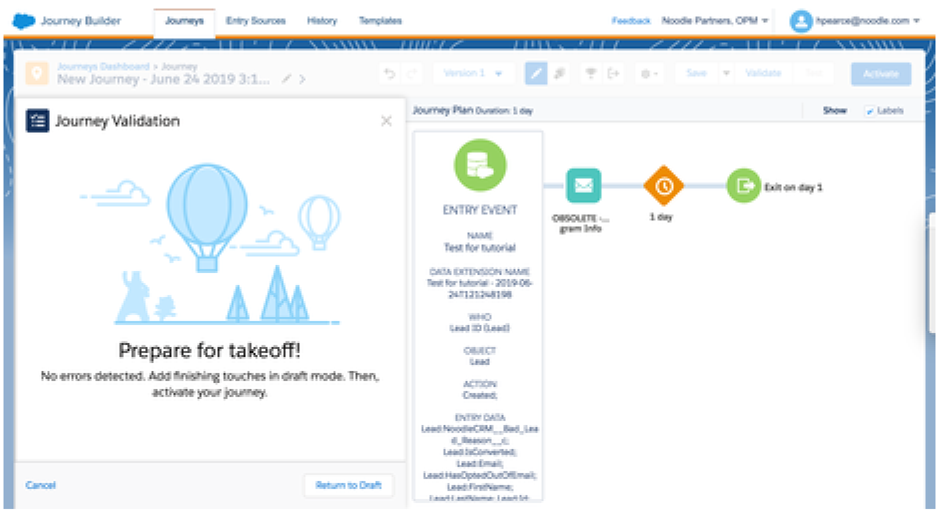
2. **Validating the Journey**
   a. Once you're done building the journey, it's time to check if it will actually work, and that it is free of bugs and system errors.
   b. To do that, click on the "Validate" button at the top right corner of the Journey Builder (**NOT** "Activate")



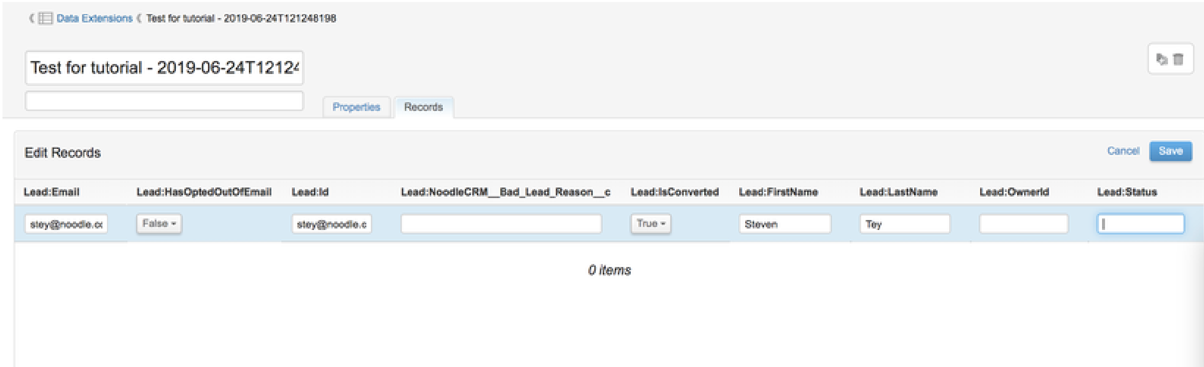
   c. Whoops, it looks like we have an error! To fix the issue, click on "Edit"
   d. Select "No Re-entry" for the Contact Entry option. This is to prevent anyone who's received the autoresponder email once from receiving it again.
   e. Click "Done".
   f. Hit "Revalidate".
   g. Brace for it....



h. Tadaa!!!



3. **Save Journey as Template**
    a. Since SFMC cannot fake the Entry Event used as the Entry Source, we cannot test the journey that we just created. Instead, we will have to save this journey as a template and create a new journey which uses a different type of entry source.
    b. Hover over "Save" and click on the "Save as Template" option to save this journey as a template.
    c. Under "Define Template Info", enter the necessary details and click "Create Template"
4. **Create New Journey**
    a. Going back to Journey Builder, create a new Journey by selecting "Create from Template"
    b. After creating the template, replace the "Salesforce Data" data entry with "Data Extension"
    c. Click on "Data Extension" and select the correct Data Extension for your test run.
    d. Make sure that the "RECORD COUNT" field for your Data Extension is not 0. If it is 0, you will have to go to Step 7 and configure that, if not, move to Step 8.
5. **Configure Data Extension**
    a. Go back to Marketing Cloud homepage, click on "Audience Builder", and from the menu bar, select "Data Extensions"
    b. Select the Data Extension that you want to add contacts to
    c. Click on "Records", followed by "Add Records"
    d. Input all the necessary details, and then click "Save". Your contact should be saved under the Data Extension, and the "RECORD COUNT" field in Step 6 should now be 1 instead of 0.



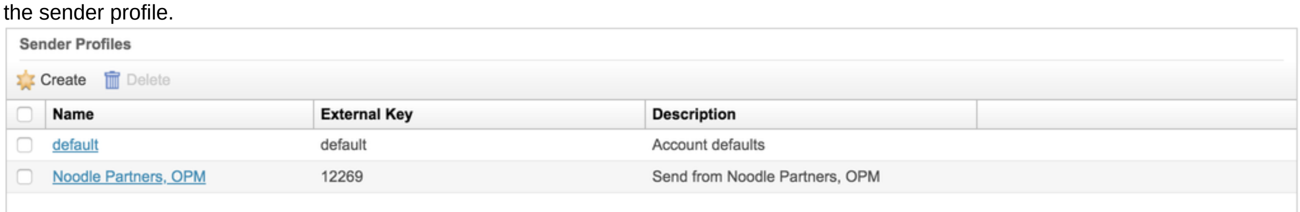
6. **Test the Journey**
    a. Click on "Validate" again to validate your journey.
    b. Once your journey is validated, you should be able to test your journey by hitting "Test Journey"
    c. Choose the contacts that you want to test the journey with. These contacts will be the ones the test email will be directed to - it will be addressed to their first name.
    d. Under "Send Type", select "Send Only Test Messages" and key in your email address.
    e. Go to Summary and click "Start Test"
7. **Receive Your Test Email**
    a. The test email could've landed in your spam, so don't forget to check that.
    b. Check if the first name at the beginning of the email matches the first name of the Lead ID.
    c. If everything is working perfectly, you are good to go!

Thanks for reading this guide!

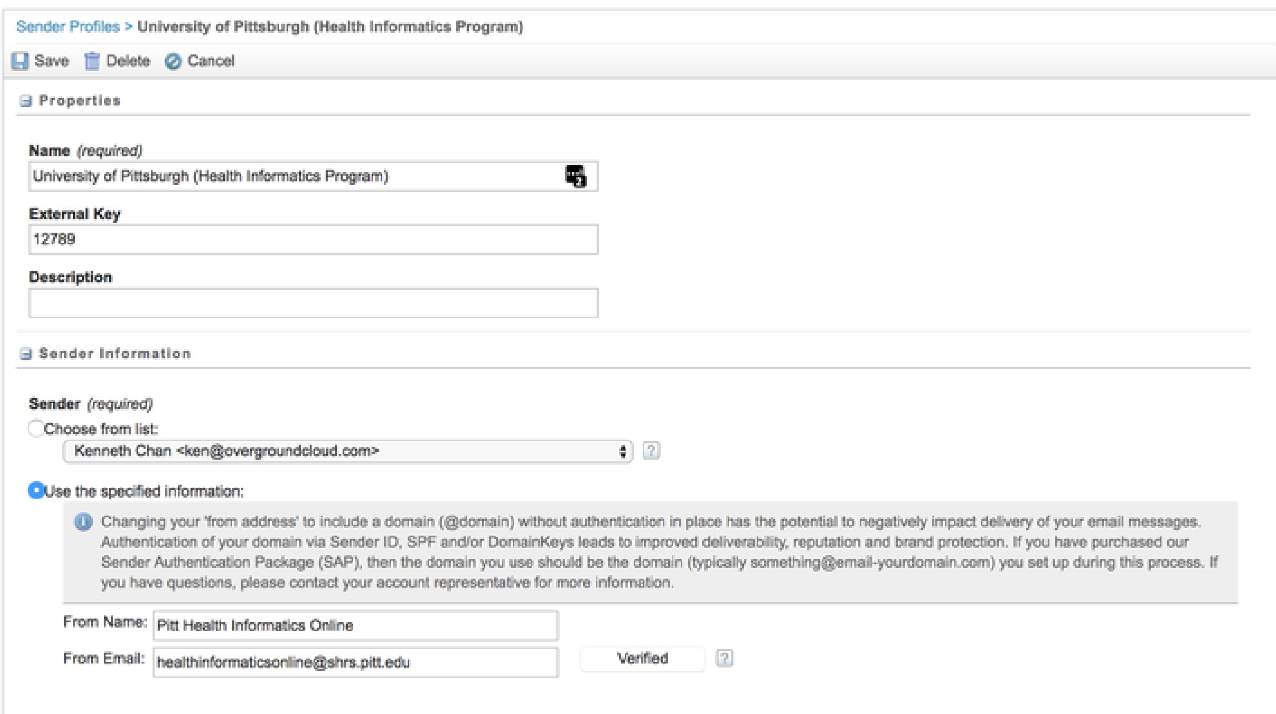
How to Set Up Unique Sender Profiles for Programs Under the Same BU

As stated in the previous article, some universities might have multiple schools/programs under its wing. Therefore, we would need to customize the ***Email Display Name*** and the ***Email Reply Address*** of the emails we send out to each school/program. In this article, we will be teaching you how to set up unique sender profiles for each individual program units under a single business unit.

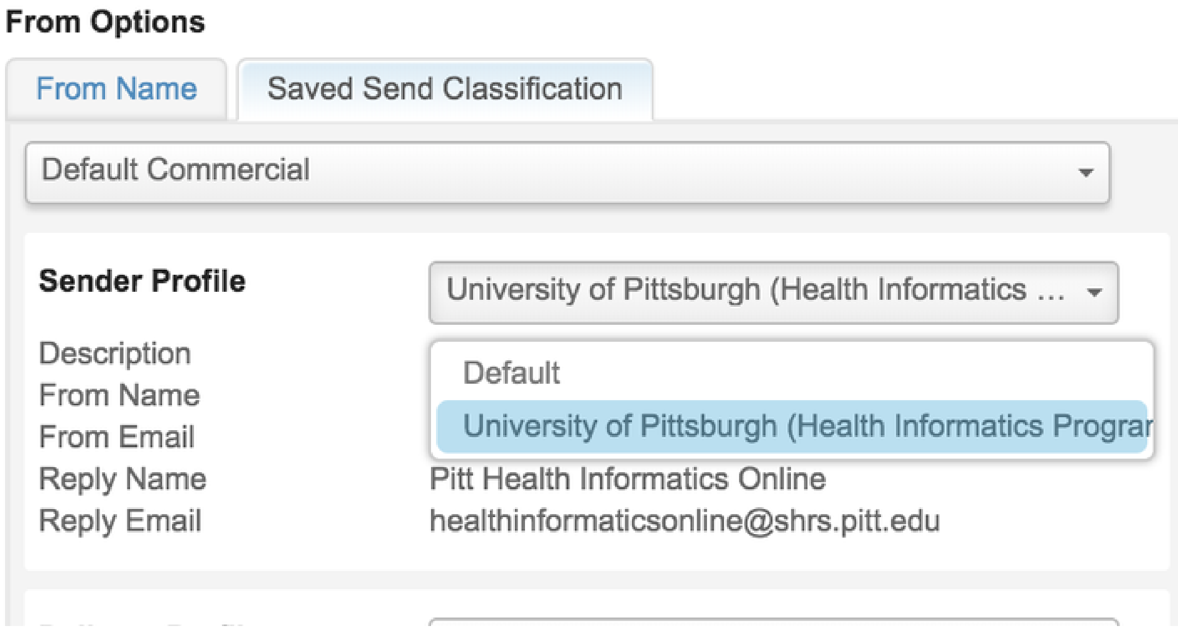
1. Go to Email Studio, select "Email".
2. From the top menu bar, select "Admin".
3. On the menu bar on the left, select "Send Management", and then click on "Sender Profiles"
4. By default, the Business Unit should have a couple of default sender profiles, which will use information from the business unit itself as the sender profile.



5. Click "Create".
6. Input all the necessary information. Since we are setting up the sender profiles for the programs under Pittsburgh University, we will be inputting the following:



7. Leave the "External Key" field blank; Salesforce will automatically generate a key for you.
8. Don't forget to click "Verify" for the Sender "From Name" and "From Email". Salesforce will send a verification email to the email address stated above, and by clicking on the verification link, you will be able to verify the email address.
9. Click "Save".
10. Keep adding more sender profiles depending on the number of programs you have under the specific BU.
11. Now, whenever you send an email from Email Studios, you have the option to pick the newly created sender profile as the designated sender profile of the email.


From Options
From Name
Saved Send Classification
Default Commercial
Sender Profile
University of Pittsburgh (Health Informatics …
Description
From Name
From Email
Reply Name
Reply Email
Default
University of Pittsburgh (Health Informatics Prograr
Pitt Health Informatics Online
healthinformaticsonline@shrs.pitt.edu

How to Set Up SAP for Business Units

There are two methods to set up the SAP for a university Business Unit.

1. The university delegates name servers to a new subdomain, dedicated for Marketing Cloud use only.
2. University self-hosts DNS entries

Option 1: University Delegates Name Servers

Delegate the Name Servers (NS) for a new subdomain (do not create the sub domain, this subdomain is dedicated for Marketing Cloud use only) to:

- ns1.exacttarget.com
- ns2.exacttarget.com
- ns3.exacttarget.com
- ns4.exacttarget.com

Once the Name Servers are delegated to Salesforce Marketing Cloud (could take up to 24 hours), we will have to fill out the following form https://senderauth.marketingcloud.com/

Information and recommendation about the SAP form:

Contact Information:

This will be the contact information for the individual user who will be the point of contact for setting up SAP. This user will get the emails for this SAP setup. For the Company Section Fill out the University's information.

Account Information:

Account ID

This is the MID of the Business unit to setup SAP on. You can find this by:

1. Going into the Business Unit
2. Hover over the Business Unit name, in the top right of the navigation bar.
3. You will see a MID. The MID is the Account ID

Would you like to utilize Reply Mail Management at this time?

This is to forward any replies to an inbox when a user replies to an email sent from Marketing Cloud. It can also detect any replies with specific keywords (such as unsub, unsubscribe, remove) in the response and automatically unsubscribe the user in Marketing Cloud and redirect any other responses to another email inbox.

Live Email Address or Inbox Replies will be Forwarded To

The email address to forward any replies to with Reply Mail Management.

Private Domain Information and Configuration:

Sender Authentication Private Domain

This is the newly created subdomain that was delegated to Salesforce Marketing Cloud.

What Account(s) should the Sender Authentication be applied to?

This tells Salesforce if you want this SAP package to apply to the account only, or any sub accounts created afterwards. This will depend on the setup for this Business Unit and whether sub business units will be created or not. If sub Business Units are not needed then I recommend selecting “Assign Sender Authentication to this Account and Sub-Accounts”. This option allows you to use this SAP if a sub business unit is created later on.

Does Salesforce Marketing Cloud need to purchase this domain for you?

Select “No”.

Will you self-host the needed DNS entries? PLS NOTE: This option is not recommended and support for adding the DNS entries is not provided by Salesforce Marketing Cloud.

Select “No”. Delegating the Name Servers to Salesforce allows them to set this up without any internal IT team involvement, after delegating the Name Server.

If the University’s IT team cannot delegate the Name Servers to Salesforce then the “Yes” option is needed here: **See Option 2.**

Option 2: University Self Hosts DNS Entries

If the University’s IT team cannot (or is not willing) to delegate the Name Servers to Salesforce, fill out the following form https://senderauth.marketingcloud.com/

Information and recommendation about the SAP form:

Contact Information:

This will be the contact information for the individual user who will be the point of contact for setting up SAP. This user will get the emails for this SAP setup. For the Company Section Fill out the University's information.

Account Information:

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Does Salesforce Marketing Cloud need to purchase this domain for you?

Select “No”.

Will you self-host the needed DNS entries? PLS NOTE: This option is not recommended and support for adding the DNS entries is not provided by Salesforce Marketing Cloud.

Select “Yes”. Salesforce will provide the records that needs to be created but will not support the University in setting this up.

... it creates a case... salesforce provides the files... send those to th eschoool. ... note... school will screw it up... walk thrm through the format over screenshare... then confirm with SF that it's completed... how do you jkown it's working in marketing cloud... confirm sender authentication profile in business unit...

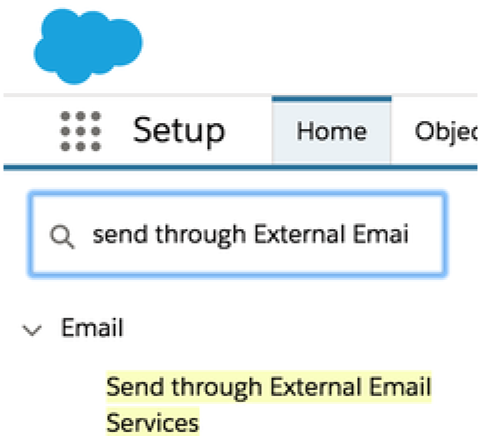
How to Send Emails Directly From Within Salesforce

As an EA, I want to be able to send emails directly within Salesforce without having to leave the app to a third-party email provider (i.e. Gmail, Office 365).

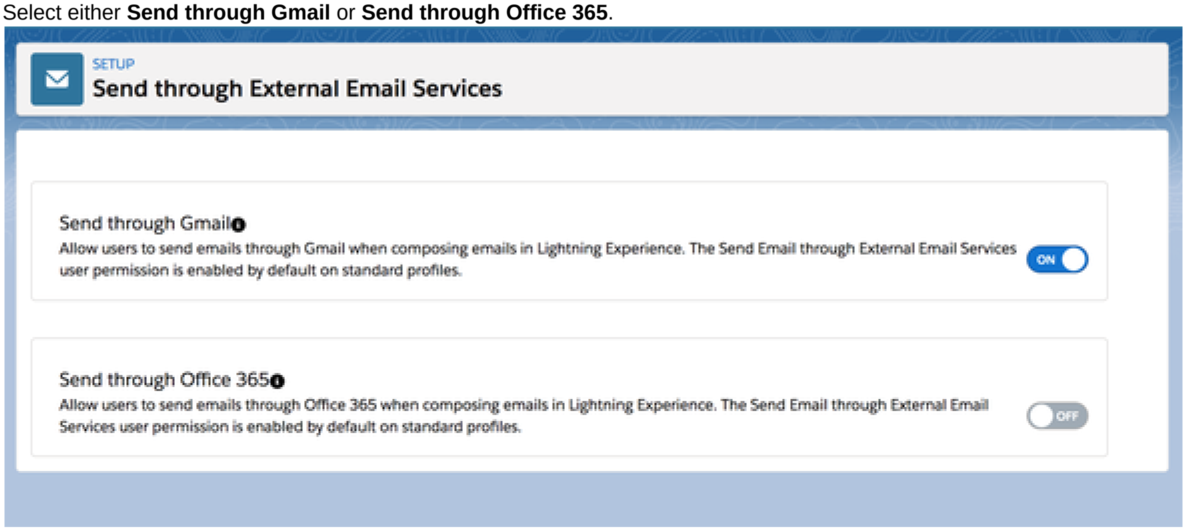
To do that, I'll have to set up this feature in Sales Cloud.

Enable Sending Emails Through An External Service

1. Login to Sales Cloud for your particular org.
2. From Setup, in the Quick Find box, enter Send through External Email Services, and then select **Send through External Email Services**.

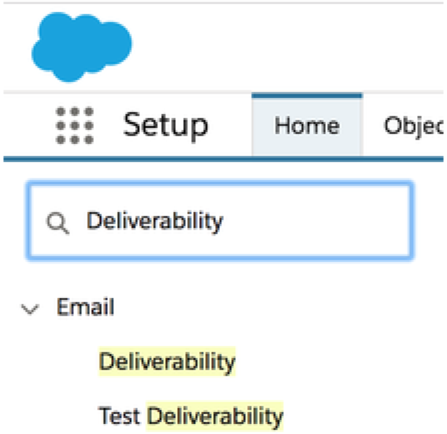


3. Select either **Send through Gmail** or **Send through Office 365**.

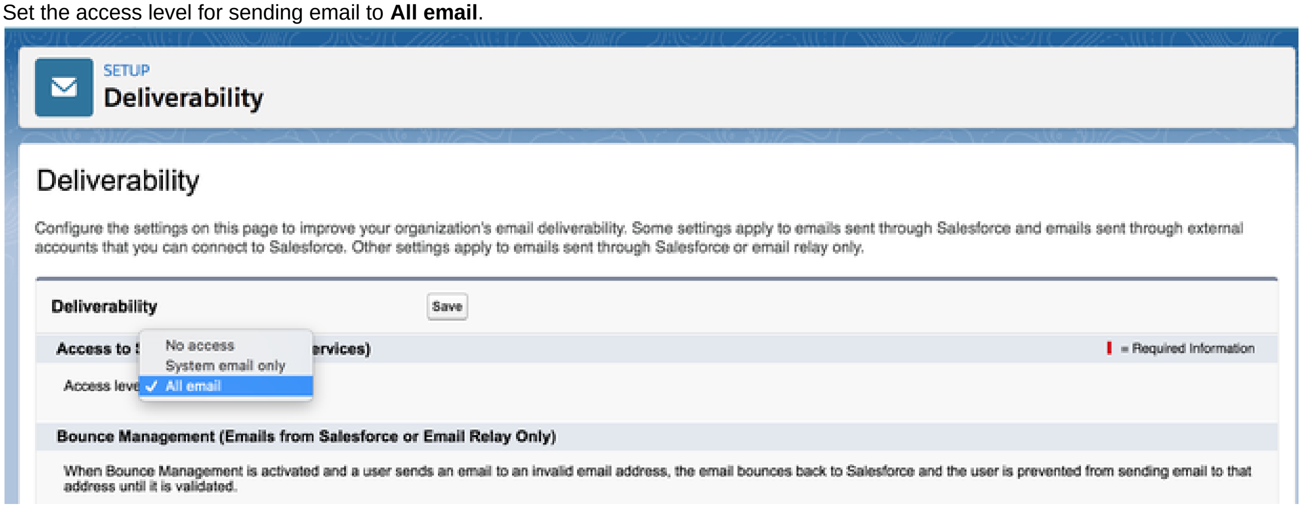


Enable Deliverability for All Emails

1. From Setup, enter Deliverability in the Quick Find box, then select **Deliverability** under Email.

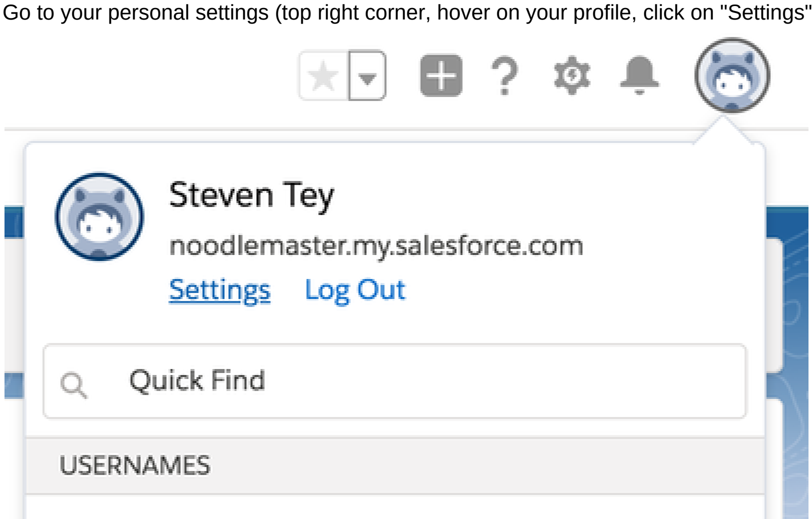


2. Set the access level for sending email to **All email**.

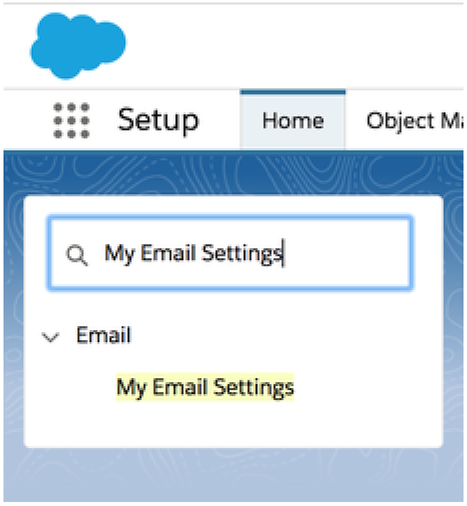


Enable Deliverability for All Emails

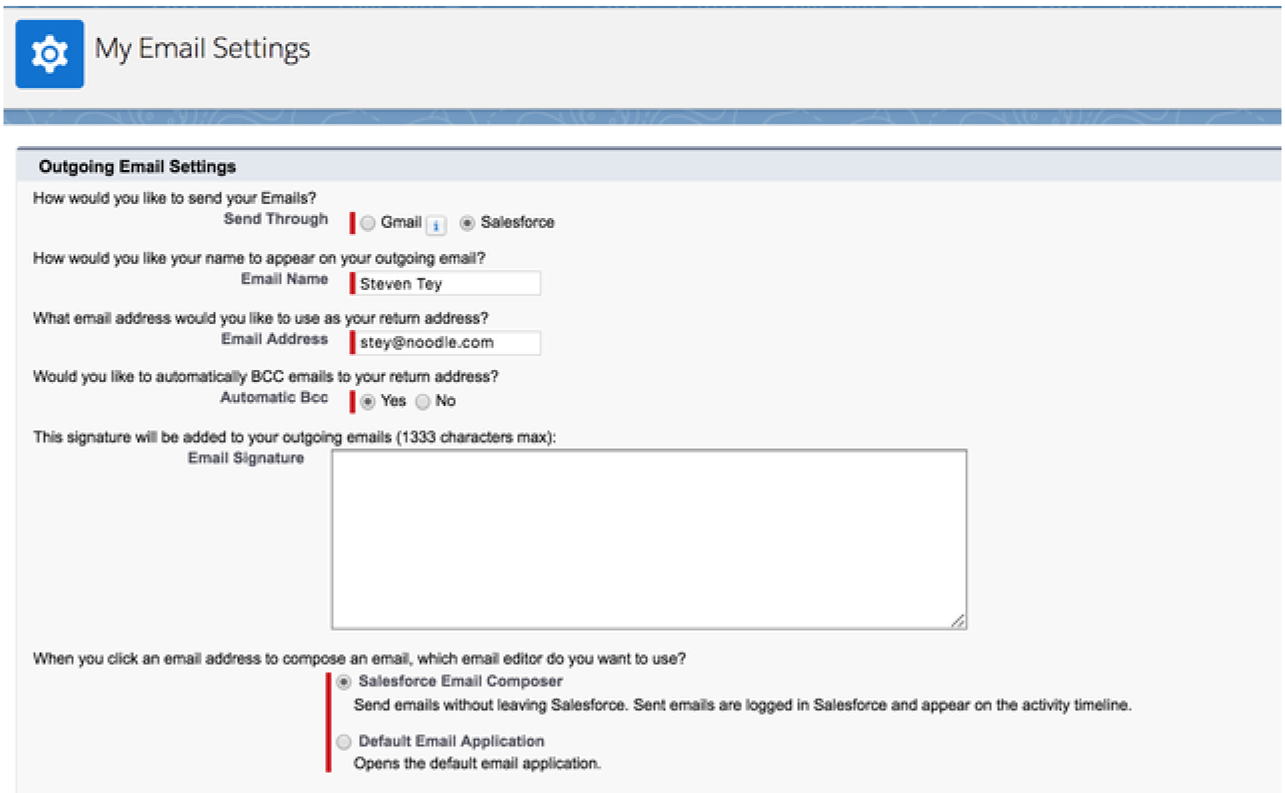
1. Go to your personal settings (top right corner, hover on your profile, click on "Settings").



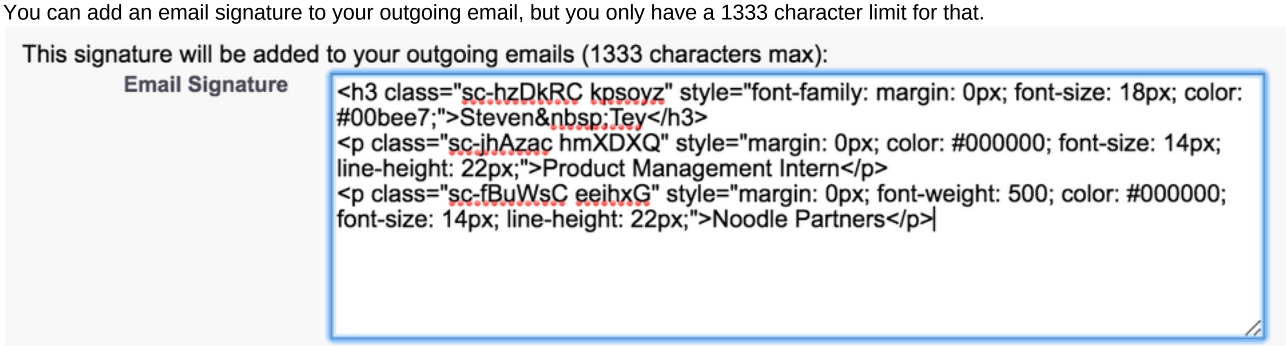
2. Enter My Email Settings in the `Quick Find` box, and then select **My Email Settings**.



3. Select how you'd like to send your email. Your Salesforce admin can enable either Gmail or Office 365 for your org. You can't choose between the two.



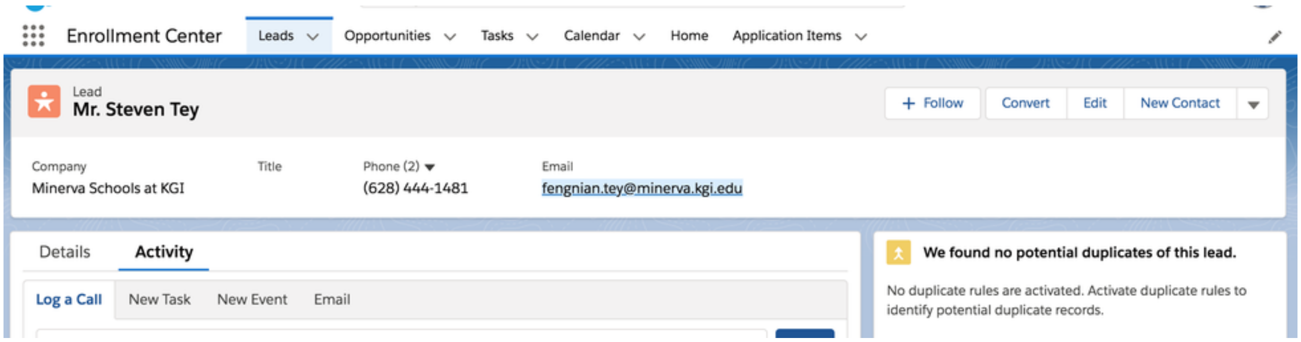
4. You can add an email signature to your outgoing email, but you only have a 1333 character limit for that.



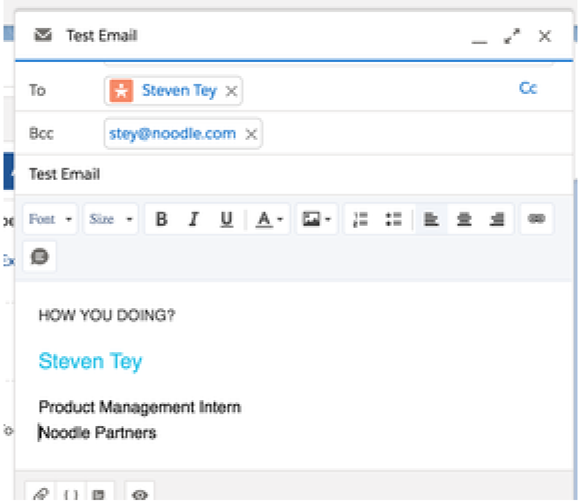
5. Click **Save**.

Send the Email

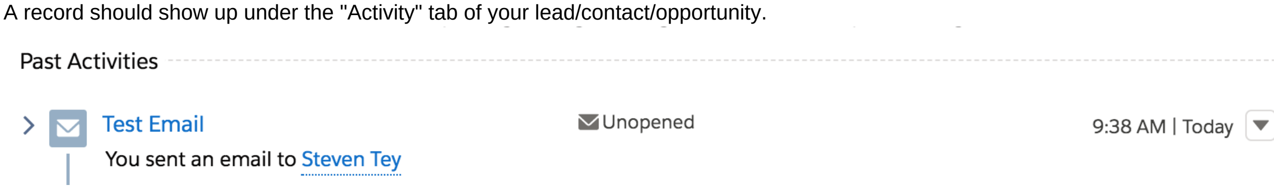
1. Go to the Lead/Opportunity/Contact that you want to send the email to.
2. Click on their email.



3. A pop-up menu should come up for you to enter the contents of your email.



4. Once you're done composing your email, click "Send".
5. A record should show up under the "Activity" tab of your lead/contact/opportunity.



THE END

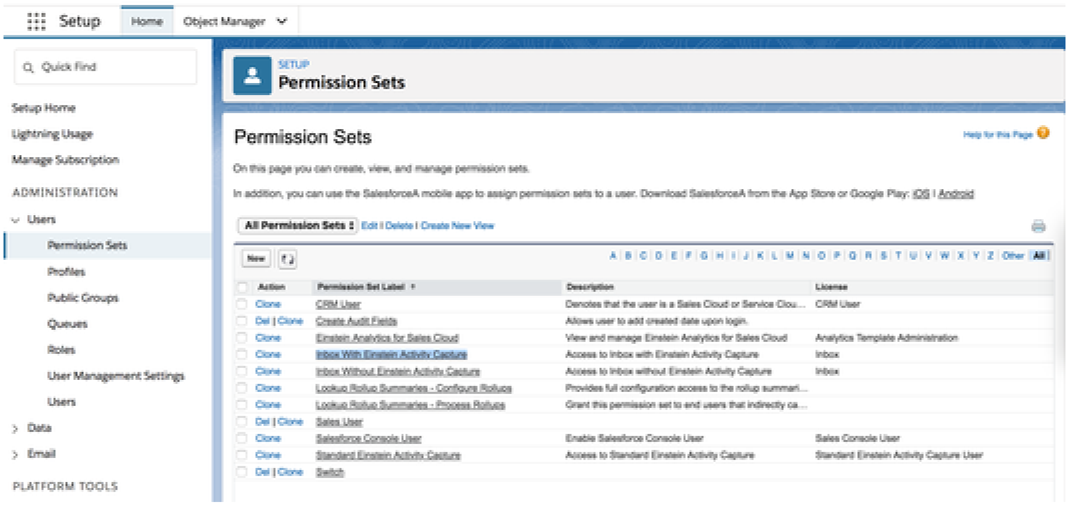
How to Activate Salesforce Inbox License for EAs/other SF Users

First, you have to make sure that your account is a System Administrator account. If you don't have a System Administrator account, ask a person who has a System Administrator account to make you a System Administrator.

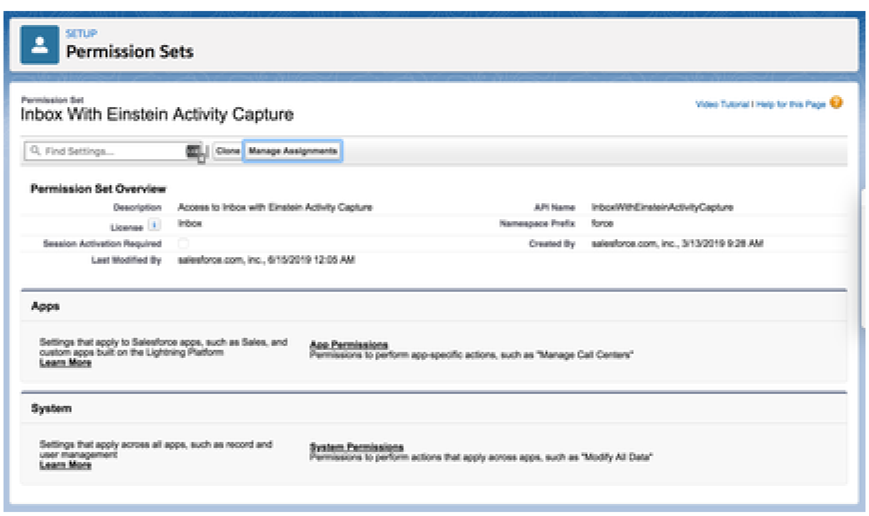
Phew, that was quite the tongue twister, wasn't it?

Then, go to Setup > Users > Permission Sets

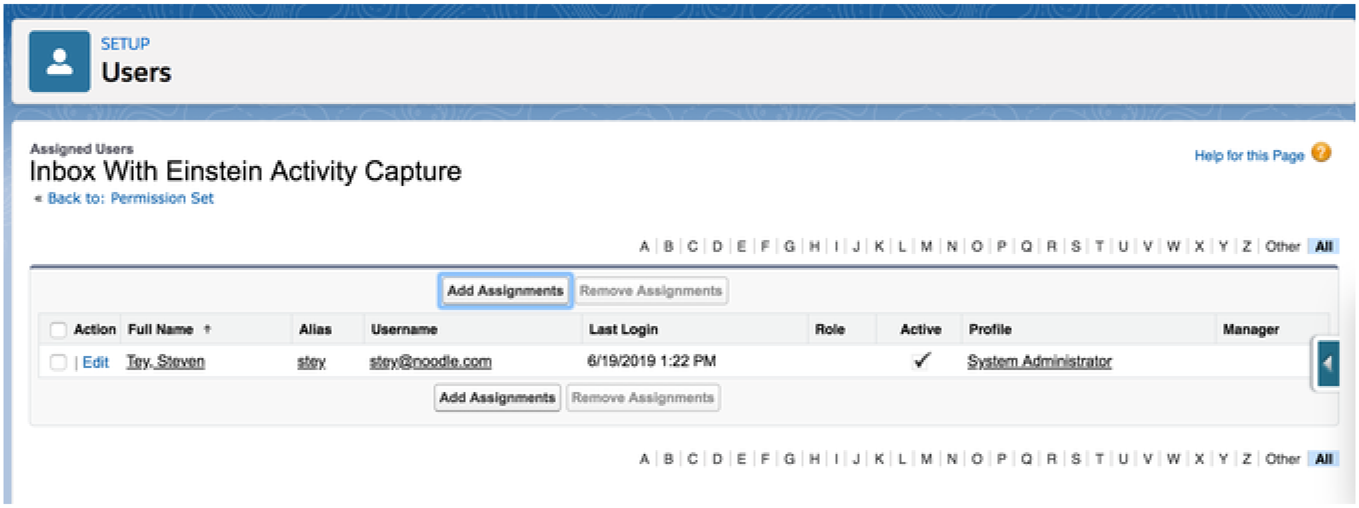
Select either "Inbox With Einstein Activity Capture" or Inbox Without Einstein Activity Capture". In this example, we are going to select the former.



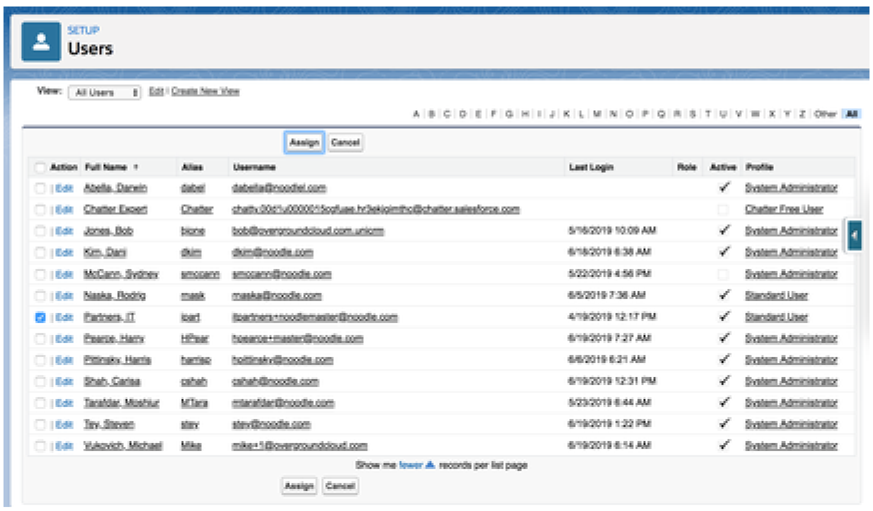
Click on "Manage Assignments"



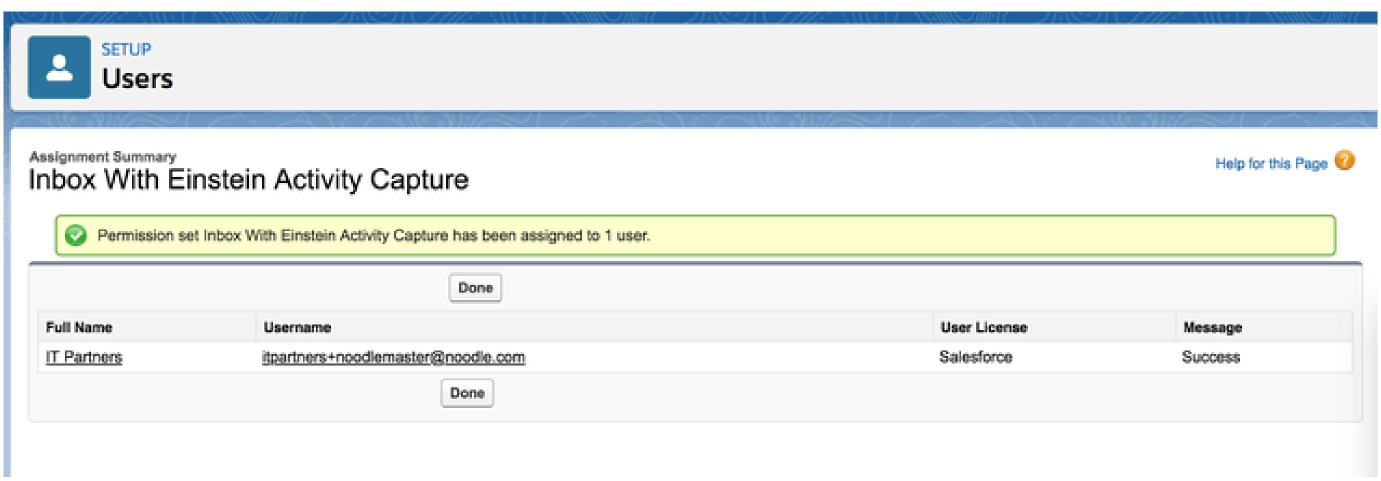
Click on "Add Assignments"



Select the user that you want to assign SF Inbox License to and click "Assign"



MISSION ACCOMPLISHED!

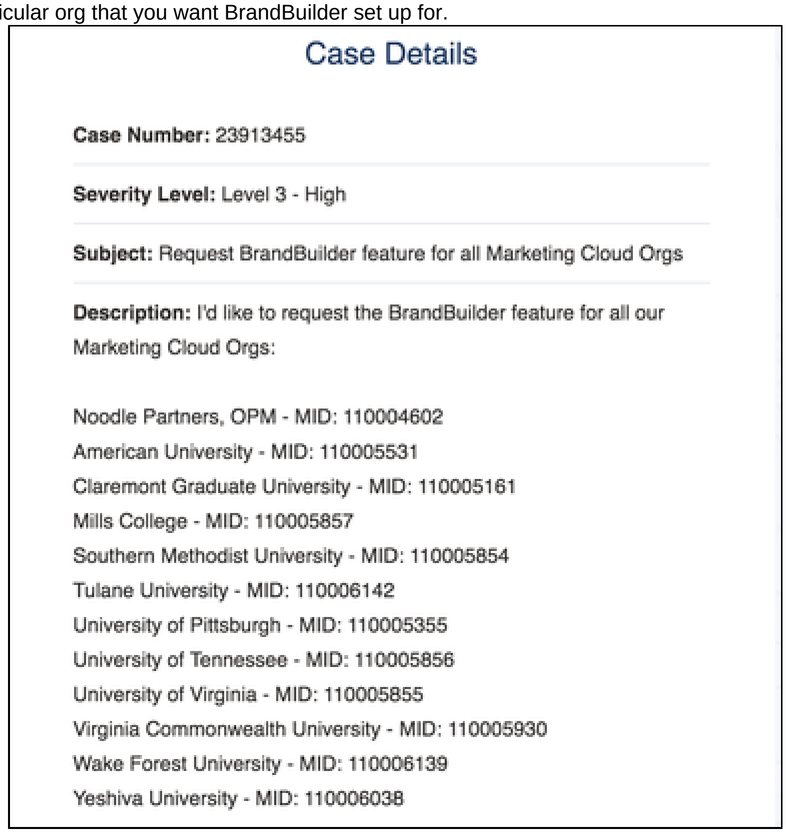


How to Set Up Custom Unsubscribe Pages

This document will teach you how to set up custom unsubscribe pages for the different programs under a business unit.

Step One: Enable BrandBuilder

1. Go to Salesforce Support.
2. Log a support case specifying that you want them to enable BrandBuilder for a particular org
3. Include the MID of the particular org that you want BrandBuilder set up for.


Case Details

Case Number: 23913455

Severity Level: Level 3 - High

Subject: Request BrandBuilder feature for all Marketing Cloud Orgs

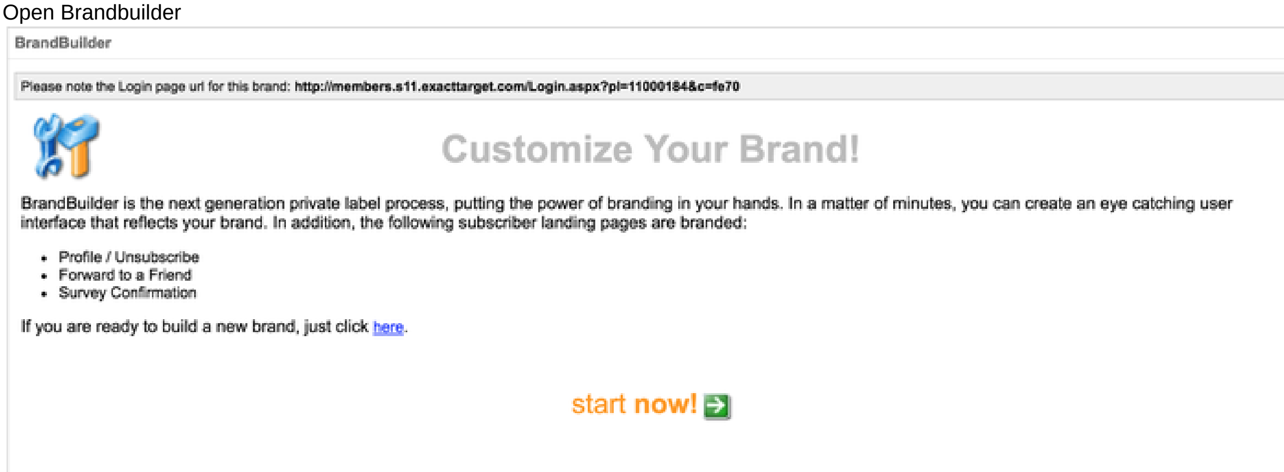
Description: I'd like to request the BrandBuilder feature for all our Marketing Cloud Orgs:

Noodle Partners, OPM - MID: 110004602
American University - MID: 110005531
Claremont Graduate University - MID: 110005161
Mills College - MID: 110005857
Southern Methodist University - MID: 110005854
Tulane University - MID: 110006142
University of Pittsburgh - MID: 110005355
University of Tennessee - MID: 110005856
University of Virginia - MID: 110005855
Virginia Commonwealth University - MID: 110005930
Wake Forest University - MID: 110006139
Yeshiva University - MID: 110006038

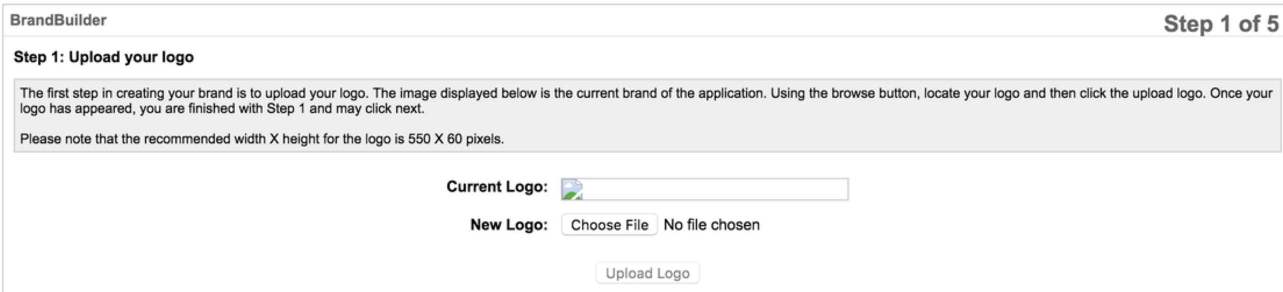
4. Once Salesforce Support sets up BrandBuilder, you will be able to access it by going to Setup > Settings > Company Settings > BrandBuilder.

Step Two: Customize Logo

1. Open Brandbuilder



2. Upon opening BrandBuilder, you'll be prompted to add the logo of your org. As you can see, the recommended width X height for the logo is 550 X 60 pixels.



3. asd

Edit > Subscription Center

Upload your logo. Give it 5 minutes, you can preview it.

You can also change the color scheme of your unsubscribe page.

Publication Lists - people will be added to the list when they get sent an email from the campaign

- You can access them by selecting audience when you send email

Public - check it, because we want to make it possible for the subscribers to unsubscribe from just one program and not everything at once.

Yesterday, I attended the Salesforce Digital Customer Service Campfire workshop, where I learned how to use various Service Cloud functions to help improve marketing, enrollment, and student success efforts.

We were given a trial Salesforce account that is valid for the next 30 days:

Username: user39@newyork19.demo

Password: decampfire1

This Salesforce login gives us access to a trial org that has the full functionalities of the Salesforce Service Cloud, which includes the following features:

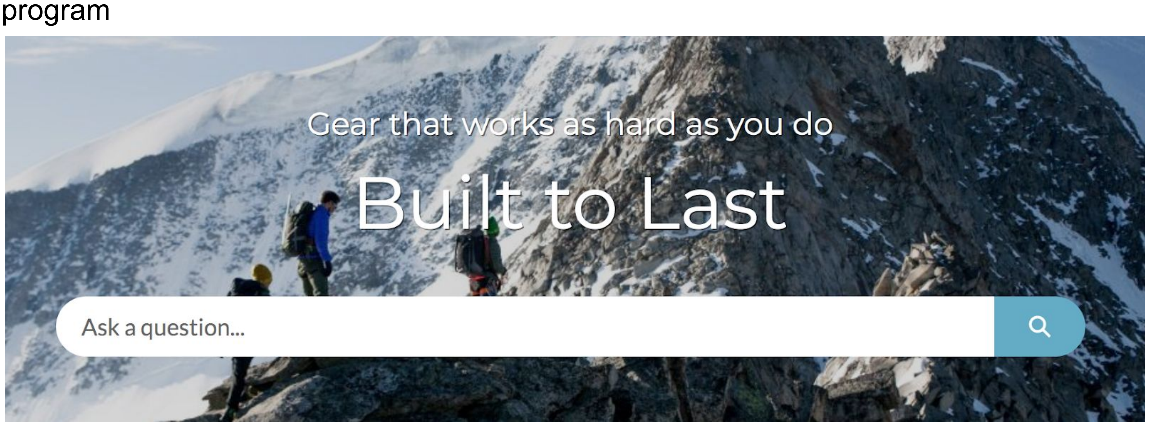
1. Self Service Community Portal
2. Omni-Channel
3. Web Chat with Live Agents
4. SMS Service Console
5. ChatBots with Einstein-powered NLP

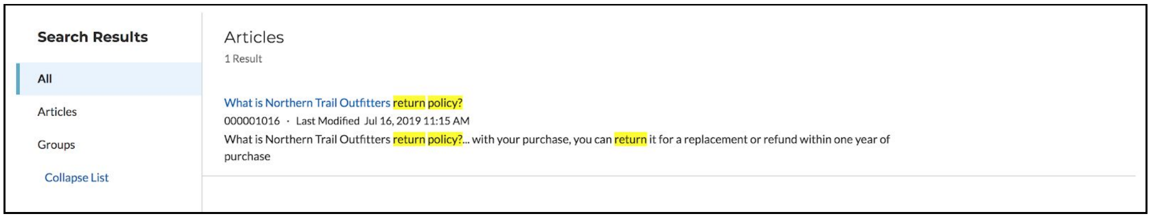
All of the setup instructions are delineated within the guidebook given to me during the event, which I will be digitizing in our Confluence pages during the next couple of weeks. In this doc, however, I will be giving a brief overview regarding the capabilities of Service Cloud and why we should be using it to help us increase efficiency and student satisfaction.

Self Service Community Portal

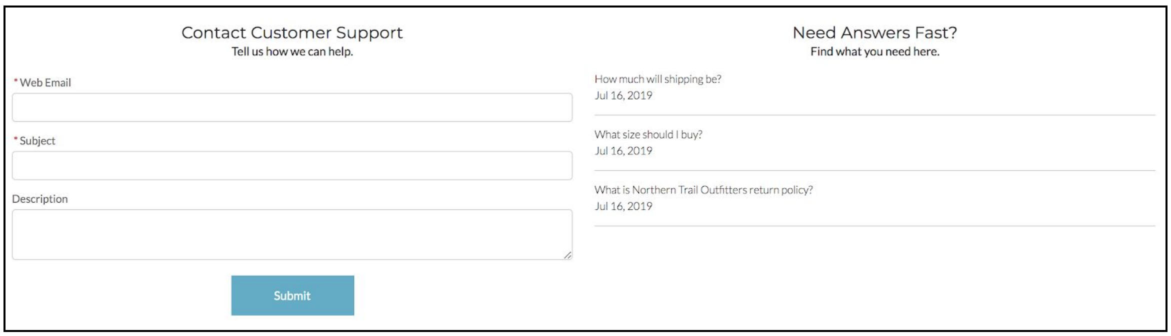
With Service Cloud, we can actually ***build microsites*** that act as helpdesks for prospective students who might be looking for more information regarding the program of interest (refer example). Below are the features that can be incorporated in the microsite:

- Search bar: Allows students to look up any inquiries that they might have regarding the program

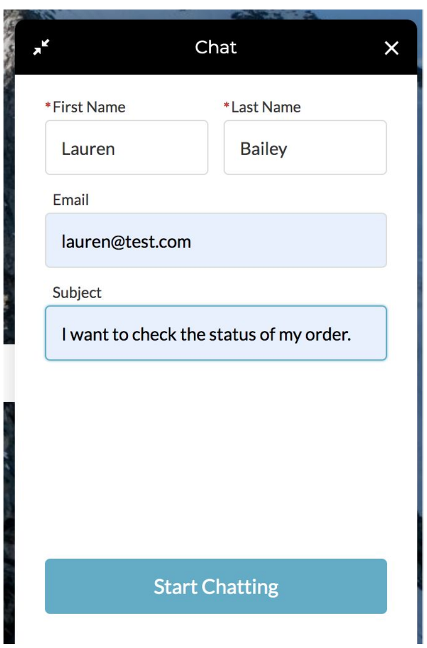


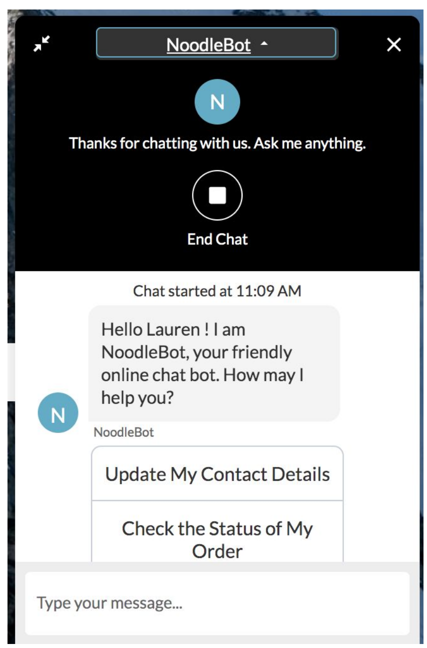


- Contact Customer Support: Students can send a message to the support team about their request



- Chat with an Expert: Chat with an agent (or a bot, more on those later) about their request

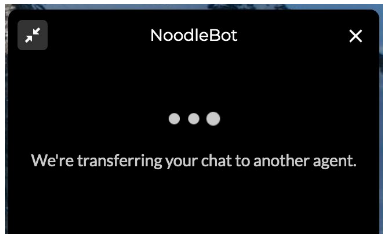




Omni-Channel

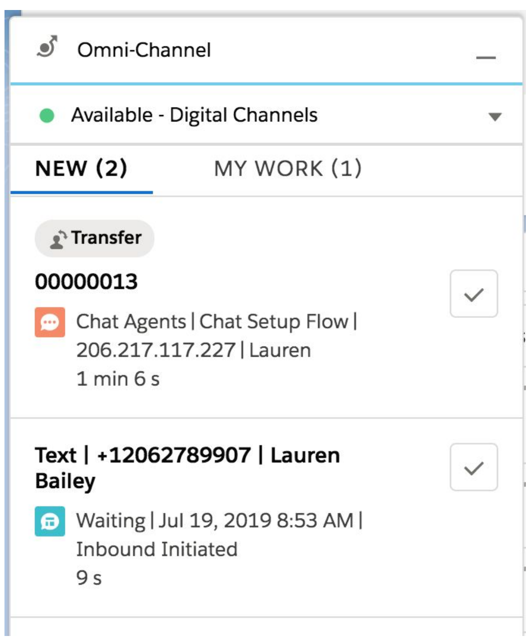
Omni-Channel allows agents to maximize their efficiency when it comes to servicing prospective students by being able to multitask and handle multiple inbound requests at the same time.

By using Omni-Channel, our EAs can handle multiple chats at once, whether if it is from the web chat or from SMS. For example, on the web chat, if the prospect selects “Transfer to Agent”:

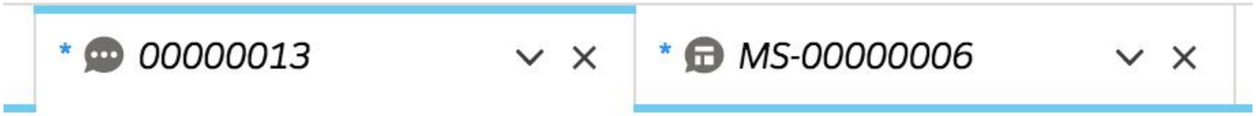


And at the same time, another prospect sends a message to the service number via text:

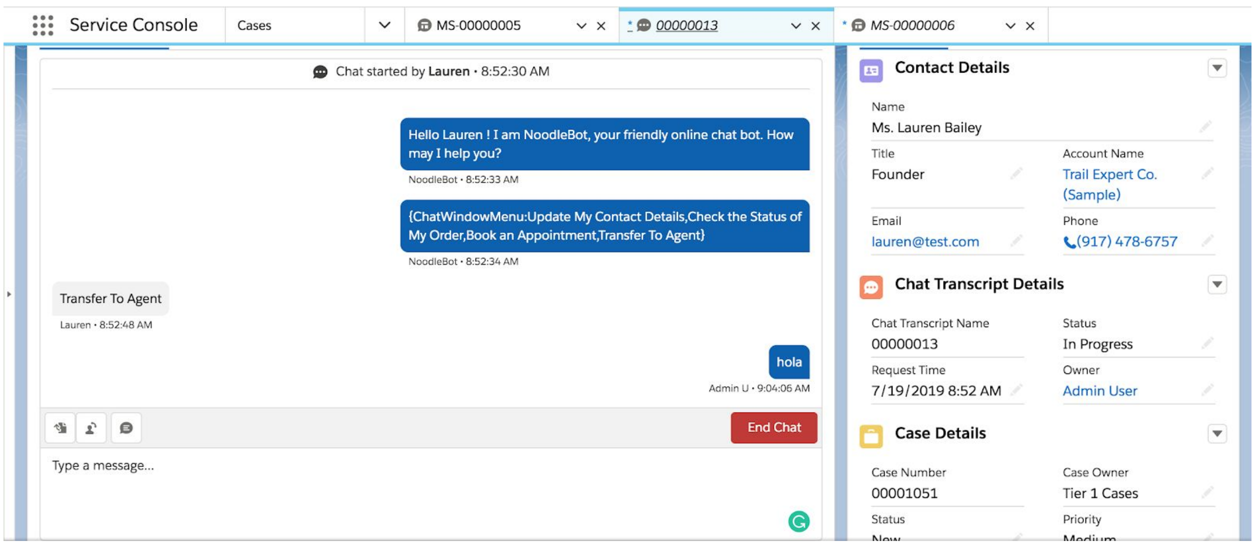
Both of those will show up as separate pending tickets on the Omni-Channel, which the agent can then click the tick to accept:



After accepting these tickets, the agent will see them as separate tabs on the service console:



They will also have the contact details of the prospect available on the side panel if this is not the first time the prospect has interacted with the particular university.



Web Chat with Live Agents/SMS Service Console
The setup for the web chat/SMS chat is rather straightforward and the step-by-step process is delineated clearly in the book that I got yesterday.

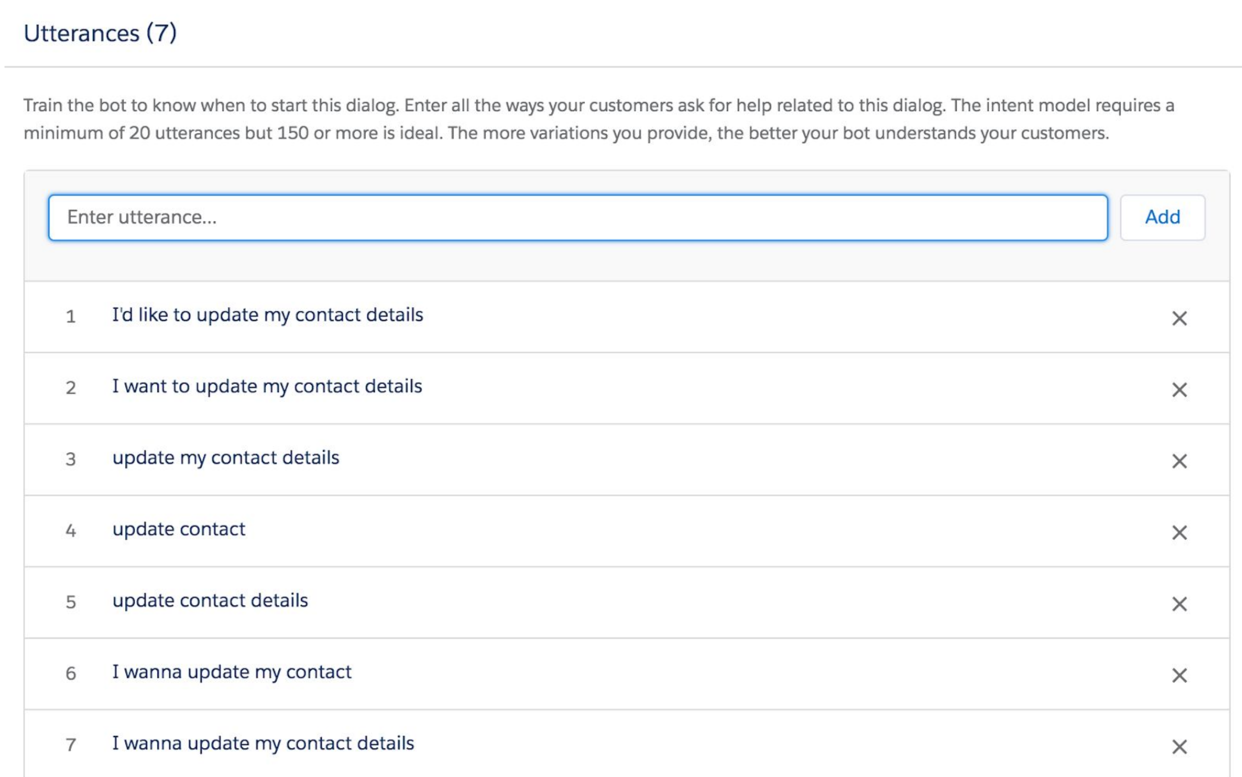
For now, emails and SMS can be outbound - we can initiate them; Web Chat, on the other hand, needs to be inbound - we cannot initiate those.

You can set up Omni-channel to receive cases depending on their respective priority levels. Service Cloud calls this the “Agent Workload”, which defines how much work that agents that are in the queue can handle at the same time. For instance, you can only handle 1 phone call at a time, but you may be able to handle many chats/emails.

ChatBots with Einstein-powered NLP

You can use Einstein bot for people to ask questions on the microsite and then the bot will solve menial tasks by providing knowledge articles, before passing on to a live agent in order to save time. Bots can even withdraw the order status for the customers without involving an agent. By using Einstein, the Bots can recognize natural language instead of just searching for matches based on exact words.

How Einstein does this is by using a database of “utterances” to train the bot to recognize commonly used phrases by prospects. For example:



Example of an Einstein bot:
Neuroflash Einstein Retail bot - https://sforce.co/2GZjKiJ

Query performance can be tracked as well - to understand what kind of things that customers are searching for and make sure they are curated well for each customer.

If you have databases/question banks in external websites, you can migrate them seamlessly into Salesforce using Coveo.