

Administration Essentials: Sending Setup



"I want to make sure we are ready for success when we send. Can you work with Warren to review how sending is set up in our account?"



Isabelle
Manager of
Digital Marketing

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Sender Authentication Package



Account Branding (one per BU) - This feature will brand your account with your chosen authenticated domain. It modifies link, landing page and image wrapping and removes all references to the Marketing Cloud in favor of your authenticated domain

Private Domain (multiple per BU) - This product assigns a domain used to send email. This domain acts as the From address for your email sends. It will authenticate your email sends using the Sender Policy Framework (SPF), Sender ID, and DomainKeys/DKIM authentication

Dedicated IP Address (multiple per BU) - This product assigns a unique IP address to your account which will be used for all email sends. This IP address represents the majority of your sending reputation

Reply Mail Management (one per BU) - This product controls the replies you receive from your subscribers. You can assign filters for out-of-office messages and manual unsubscribe requests

RESOURCE:

Search Salesforce Help for
"Sender Authentication Package."

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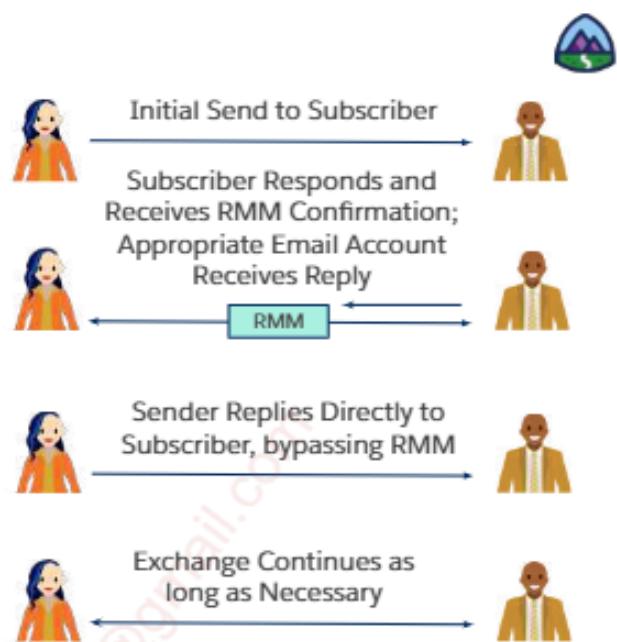
Reply Mail Management

Reply Mail Management (RMM) automatically manages response to your email's reply-to address and applies a series of rules to determine the next action:

- Filter out-of-office and auto-replies
- Honor unsubscribe requests (Setting: Unsubscribe Manual Requests = Yes)
- Forward an email to different users depending on different circumstances
- Conditionally auto-reply and control the content of that auto-reply message

 **RESOURCE:**

Search Salesforce Help for "Reply Mail Management."



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Administration Essentials: Send Classifications

"Ralph asked to make sure that all of our commercial Marketing communications show the name "NTO" as the From Name. I'll show you how I set that up."



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Send Classifications

- Send classifications define parameters for an email job in a central location.
- The account can reuse those parameters for multiple email send definitions.
 - For example, an admin creates a send classification used every time a message containing a catalog sends to ensure that send always uses the appropriate parameters.
- Select a send classification, together with content information and audience information, when you send an email.

Send classifications include these components:
Sender Profile
Delivery Profile
CAN-SPAM classification

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Creating a Send Classification

You create the delivery profile and sender profile separately before you create the send classification.

You can override the delivery profile and sender profile on the send classification when you include the send classification in a message interaction.

Sender
Profile



Delivery
Profile

Send Classification

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What is a Sender Profile?



- Specifies the From information for a send in a central location.
- Reuse that information across multiple sends without requiring selection each time.
- Contains the from name and email address that the message appears to be from in the subscriber's email client.
- For optimal deliverability, the email address needs to be from the domain defined by the Sender Authentication Package.
- All email addresses must be from a verified domain.



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Domain Verification and From Address Management



- Used to verify From Addresses used when sending email through Marketing Cloud.
- Prevents sends from going out with email addresses that aren't verified.
- There are three ways to verify a domain:

1

Automatically verify a domain through an authenticated domain in your Sender Authentication Package.

2

Register an unauthenticated domain through Domain Registration. Relies on DNS Record Management.

3

Verify individual email addresses. This does not verify the domain—only the individual email address.

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Sender Profile: Creation Options



Users	Custom	Personalization	AMPScript
<ul style="list-style-type: none">• Uses From Name and From Email Address from User data.• Usernames are typically not ideal for From Names.	<ul style="list-style-type: none">• Allows you to populate the From Name and From Email Address with static information.	<ul style="list-style-type: none">• Allows dynamic population of From Name and From Email Address.• All data must be in one data source.• Fallback address available.	<ul style="list-style-type: none">• Allows dynamic population of From Name and From Email Address.• Data can be in a separate Data Extension.• Fallback address available.

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What is a Delivery Profile?



When you create a delivery profile, specify the IP address to use.

- If you do not use a private domain, select the account default.
- If you use one or more private domains, you can select the private domain to use.

Choose the header and footer to use on the delivery profile.*

- Header refers to the text at the very beginning of the document that, by default, provides a link to the email as a web page.
- This header does not include the header graphic that you specify in a template.
- Footer refers to the text at the very end of a document that contains your physical mailing address and unsubscribe link.

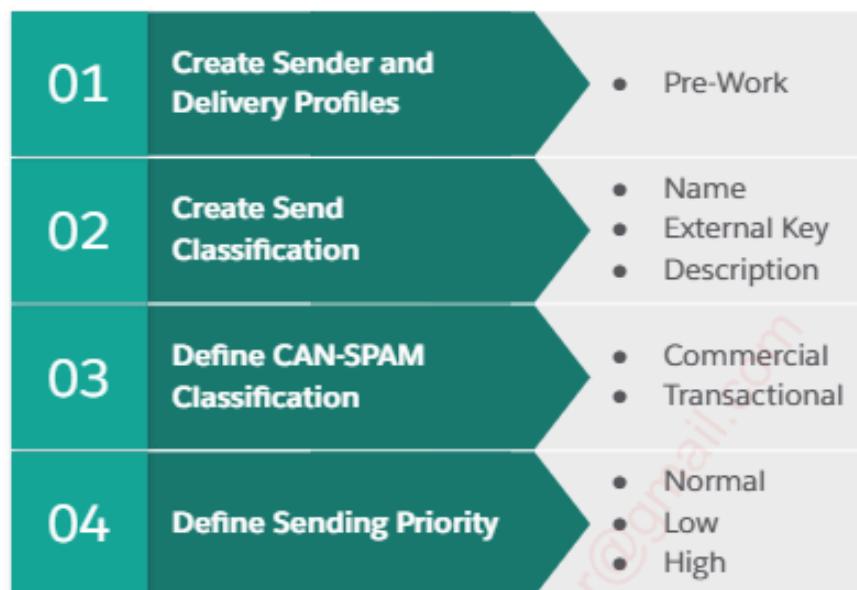


BEST PRACTICE:

*Header and Footers in the Delivery Profile are built in Classic Content. Best Practice is to build them into a template.

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Create a Send Classification



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Join Me



2-2: Create a Send Classification

Goal:

Create a Send Classification to define a From Name on behalf of NTO.



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Instructions:

1. Create a Sender Profile.
2. Create a Send Classification.

URL Expiration



Determine when and where email links for all jobs in an account:

- Set expiration time between 60 days and 2 years.
- Define a custom redirect URL.
- Also applies to:
 - standard Profile Center
 - Unsubscribe
 - View as Web Page
 - Preferences
 - Forward to a Friend links.
- System default expiration is 60 days.

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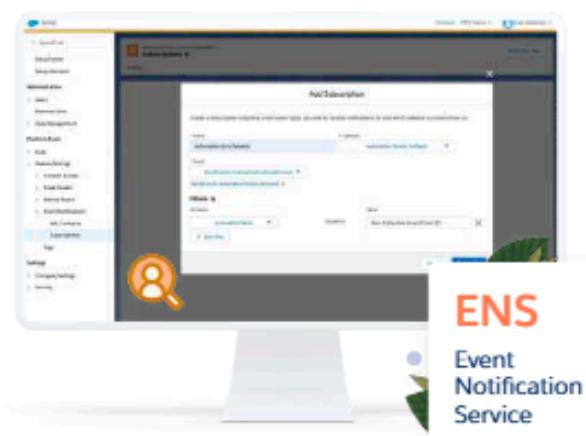


Automation Alerts through ENS



Get proactive, business-critical alerts about your automations.

- Notification options include:
 - Started
 - Completed
 - Stopped
 - Errored
 - Skipped
- Important automation details are included, such as:
 - Automation Name & Type
 - Business Unit
 - File Location
 - Error Details



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Marketing Cloud FTP Accounts and File Locations



Save and Import Content

File Transfer Protocol

- (FTP) for securely moving files between environments.
- Before you can officially move into Marketing Cloud and begin creating imports, you need to set up any FTP accounts that you'll be using.

Marketing Cloud requires enhanced FTP for these tasks:

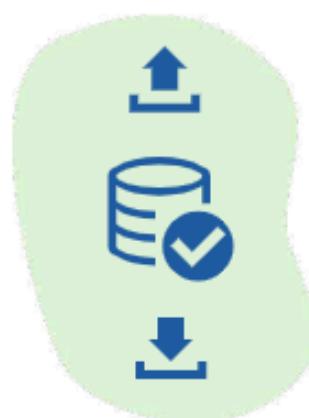
- Exporting information from the application database to the FTP server.
- Export any single file of information that is over 5 MB.
- Exporting reports available in Marketing Cloud.
- Using the File Transfer activity.
- Extracting data from the application database.
- To post import results files.

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Additional File Activities



- Import, export or transfer files directly from AWS, Google Cloud or Azure.
- Decreased upload times by skipping FTP connection limitations.
- Point and click configuration.
- Included for all editions.



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Your Turn



2-3: Scavenger Hunt

Goal:

Audit your account.

Tasks:

1. Navigate to setup.
2. Answer the questions related to the setup.



Marketing Cloud Setup Assistant



Setup Assistant guides you through configuring your new Marketing Cloud account.

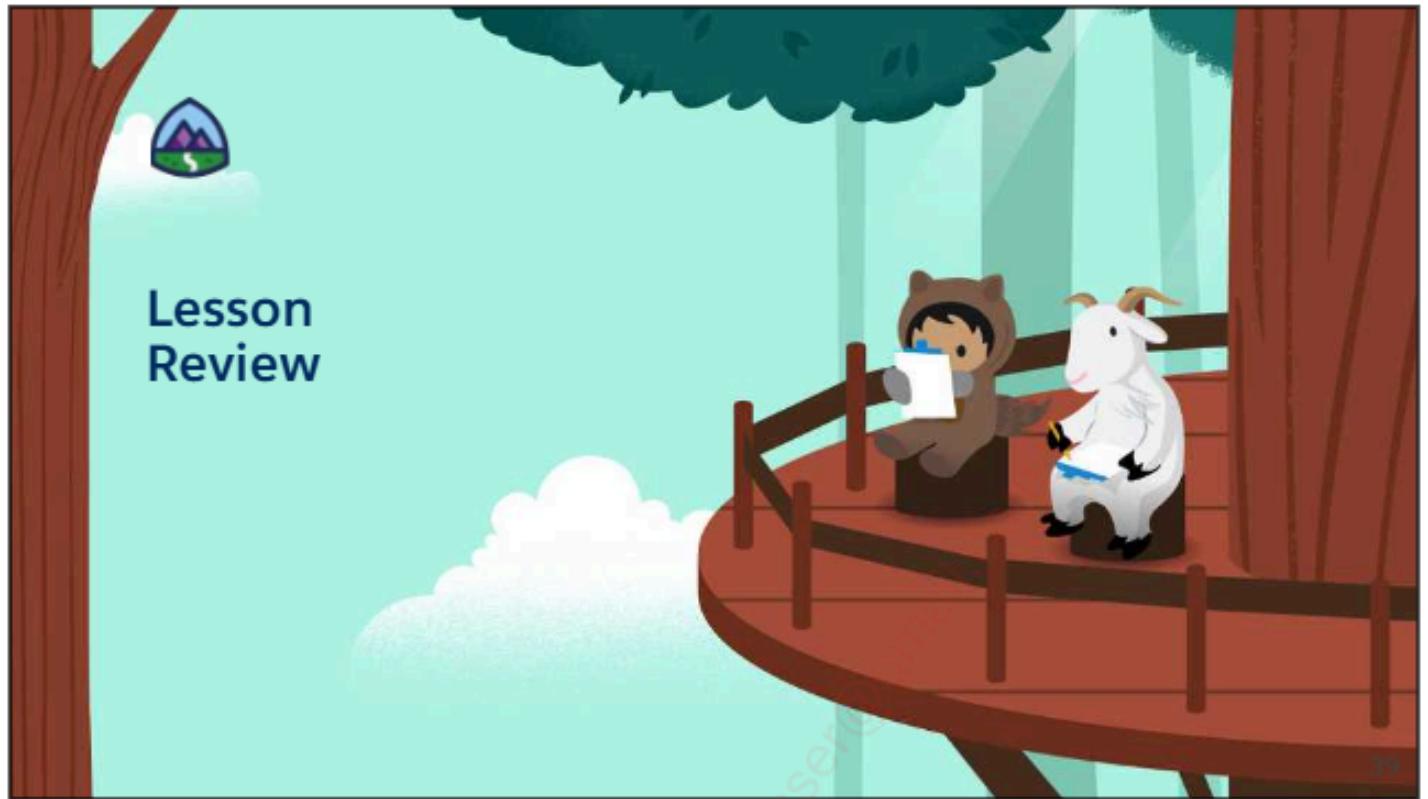
There are 6 setup steps:

1. Getting Started
2. Configure Marketing Cloud for Your Business
3. Set Up Your Data Structure
4. Build Engaging Content
5. Send with Confidence
6. Gain Insights with Analytics



RESOURCE:

Search Trailhead for
“Marketing Cloud Setup.”



Lesson Review

Lesson Review

Question 1:

Where would an admin go to define the IP Address used for specific types of sends?

A: Sender Profile

B: IP Safelist

C: Send Classification

D: Delivery Profile

Lesson Review



Question 2:

What is a collection of permissions in Marketing Cloud?

A: Permission Set

B: Profile

C: Role

D: Business Unit



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Lesson Review



Question 3:

What is the hierarchical structure in Marketing Cloud that controls sharing and visibility to marketing data and assets?

A: Across Enterprise Sharing



B: Business Unit

C: Distributed Marketing

D: Tenant

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Lesson 2: Hit the Trails!



Trail:

[Learn Admin Fundamentals in Marketing Cloud](#)

Modules:

[Marketing Cloud Setup](#)

[Marketing Cloud Security](#)

[Marketing Cloud Data Management](#)

[Send Management in Marketing Cloud](#)



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Administration Essentials: Helpful Resource Links



Sender Authentication Package for Marketing Cloud Email

https://help.salesforce.com/articleView?id=mc_es_sender_authentication_package.htm&type=5

Enterprise 2.0 Overview

https://help.salesforce.com/articleView?id=mc_es_enterprise_20_overview.htm&type=5

Enterprise 2.0 Shared Items

https://help.salesforce.com/articleView?id=mc_es_shared_items.htm&type=5

Reply Mail Management for Marketing Cloud Email

https://help.salesforce.com/articleView?id=mc_es_reply_mail_management.htm&type=5

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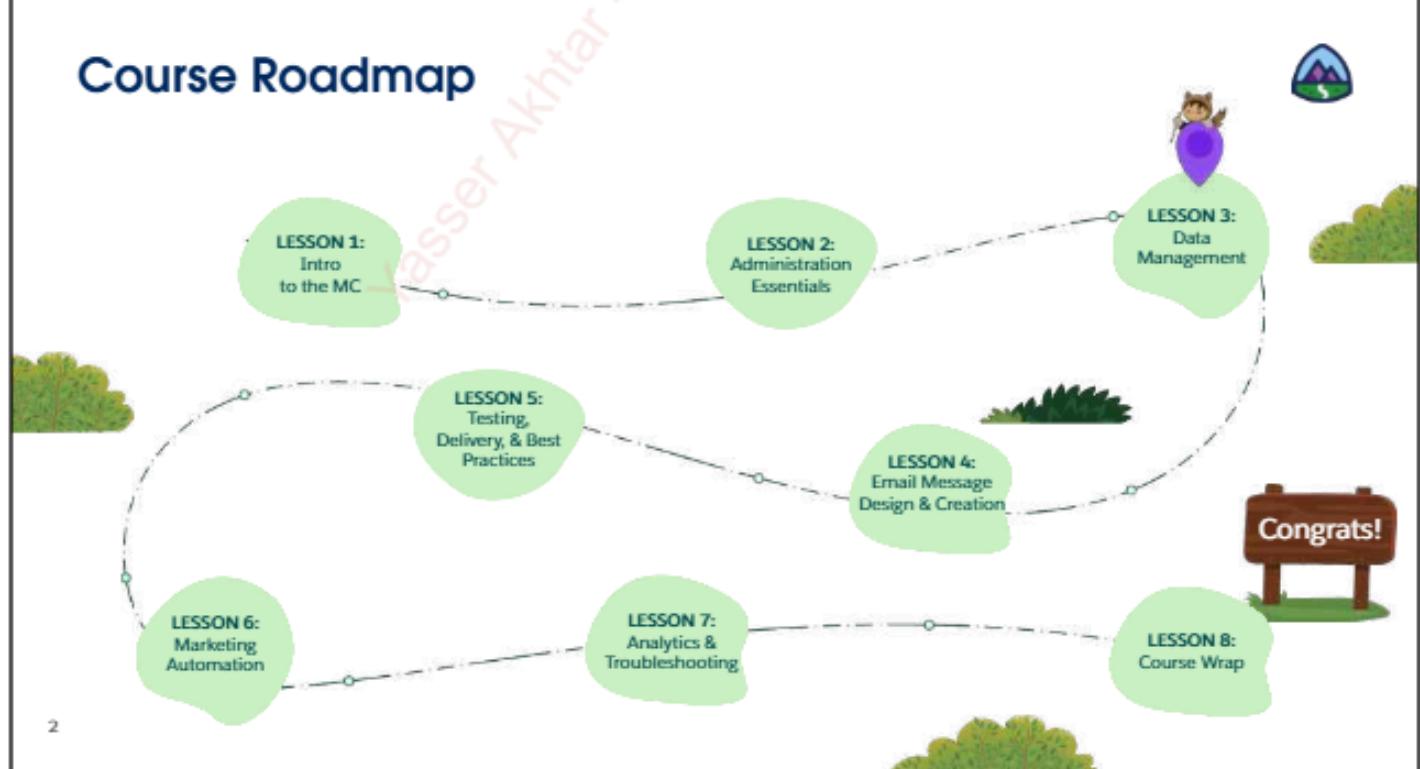
Lesson 3

Data Management



1

Course Roadmap



Lesson Objectives

By the end of this lesson, you will:

- Learn more about Northern Trail Outfitters' marketing campaigns and goals.
- Understand how to set up data to support their goals.

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Data Management

Lesson Topics

1. Define data management & structure terminology.
2. Import data.
3. Apply a simple data model concept to a relevant scenario.
4. Create targeted segments using data segmentation tools.

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Data Management: NTO's Data



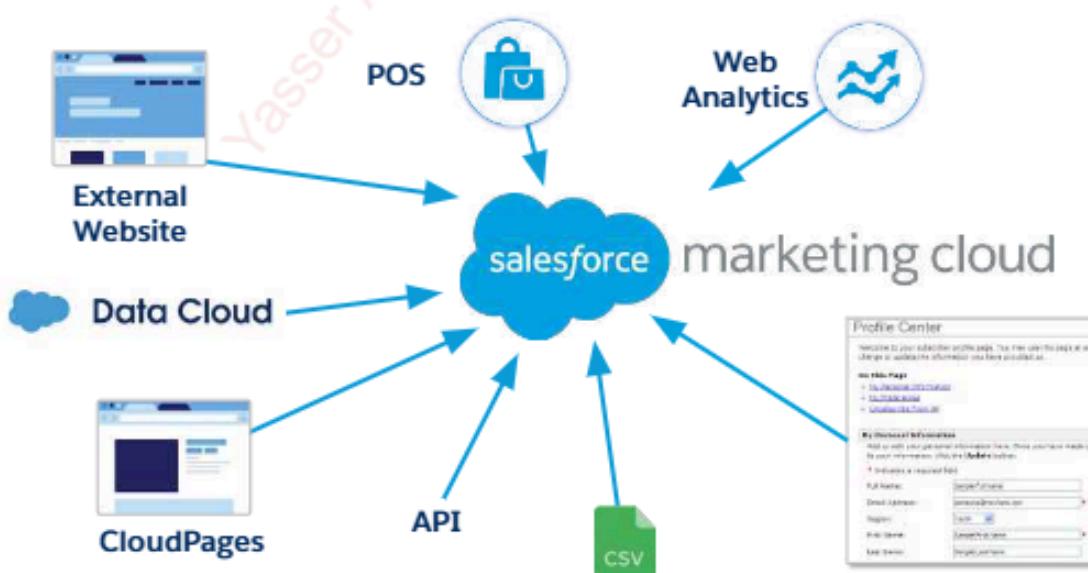
"We're going to be implementing a new campaign for abandoned carts on our website. Can you set up new data extensions for Abandon Cart campaign emails? I'll email you the details."



Isabelle
Manager of
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Acquisition: Where does NTO's Data Come From?



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Contact Builder



Contact Builder lets you access, manage, organize, link, and view contact data from all Marketing Cloud applications and channels.

Think of Contact Builder as an application for setting up a relational database with your data.

Contact Builder is useful for decision splits and when you need to move contacts through specific paths in a journey, or as a way to inject a contact into a journey itself.

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Contact Builder Tools



Contact Builder has several tools to help manage contact data for use in building 1:1 relationships:

- **Contacts Configuration.** Determine how Contact Builder processes imported contact information.
- **Data Designer.** Define information about your contacts and relate that data directly to the contact record by linking data extensions.
- **Data Extensions.** Create and manage the data extensions that hold contact information.
- **Imports.** Create the processes that move contact information into your data extensions.
- **Data Sources.** Visualize where your contact data originates and assign attributes to those sources.



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Contact



Definition

An individual added to any contact database within your instance of Marketing Cloud.

A contact is also a person you send messages to through any marketing channel.



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Contacts and Subscribers



Differentiating between **contacts** and **subscribers** is important when using multiple Marketing Cloud channels.

A **contact** is a person you send messages to through any marketing channel. A contact appears in All Contacts.

A **subscriber** is a person who opted to receive communications or belongs to a particular channel. Subscribers can be imported or created manually and are stored in data extensions.

All Contacts



BEST PRACTICE:

Be consistent across all channels when assigning a Contact Key to a contact.



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Contact Key and Contact ID



Contact Key

- Managed and related through the different channels using a single Contact Key.
- A unique identifier that the marketer assigns to a contact.
- The same no matter what channel is used to send messages.
- What allows you to connect contacts in multiple channels.
- In Email Studio, contacts are identified by the Subscriber Key, which becomes the Contact Key in Contact Builder.

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Contact ID

- A number used to uniquely identify a contact on the backend in Salesforce Marketing Cloud.
- Used to identify a contact in various channels.

Tip:

Contact data is managed in Marketing Cloud and Salesforce through Contact Keys and Contact IDs.



All Contacts



Provides a list of all contacts contained within your Salesforce Marketing Cloud account.

View additional information on that contact, including the following information:

- Engagement (activity related to specific messages)
- Membership (subscriptions to messages or lists on all available channels)
- Attributes (information on the specific contact)



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Join Me



3-1: Tour Contact Builder

Goal:

Familiarize yourself with Contact Builder.



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Instructions:

1. Navigate to Contact Builder.
2. Explore Data Designer.
3. Explore All Contacts.
4. Explore Data Sources.
5. Explore Data Extensions.
6. Explore Imports.
7. Explore Contacts Configuration.

NTO's Current Model

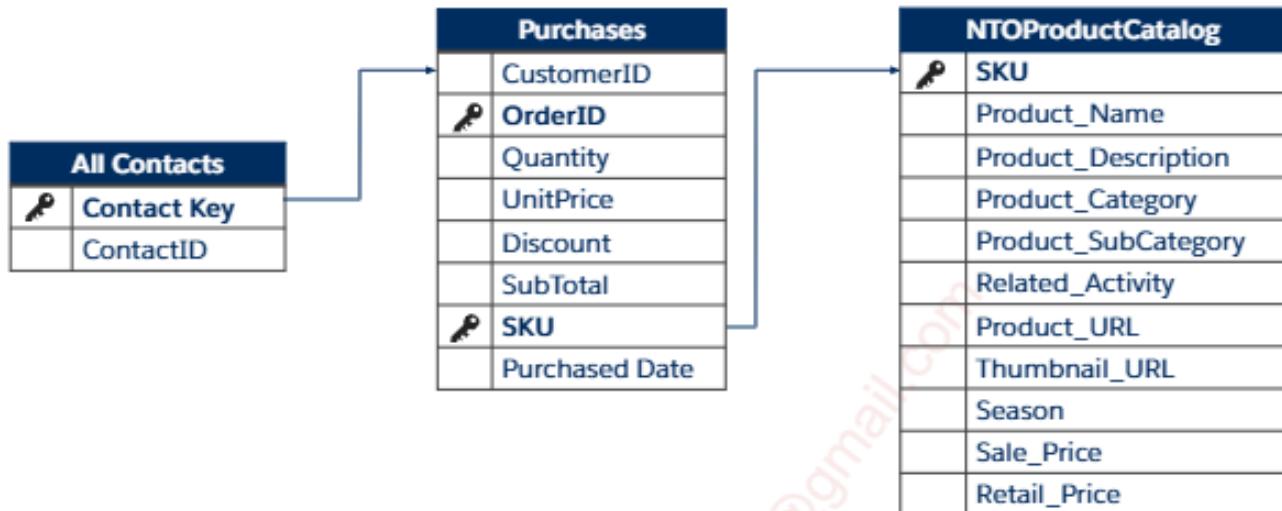


All Contacts	
	Contact Key
	ContactID

NTOSubscribers	
	EmailAddress
🔑	SubscriberKey
	FirstName
	LastName
	Address1
	Address2
	City
	State
	Zip
	Mobile
	Birthday
	OptInSource
	Gender
	Interest
	myNTO
	OptInDate

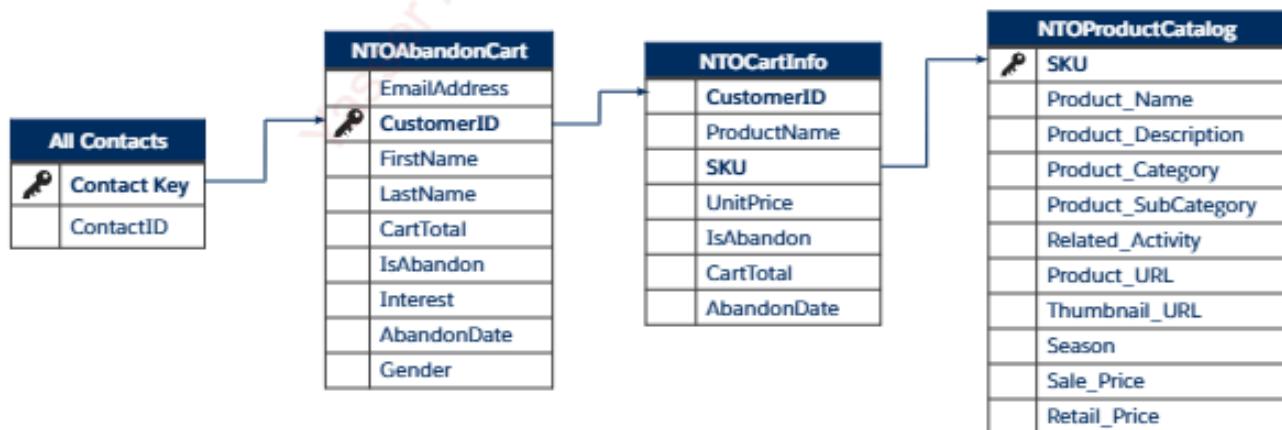
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NTO's Current Data Model (cont.)



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Abandon Cart Data Model



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What is a Data Extension?



SubscriberKey	EmailAddress	First_Name	Last_Name	Gender	DOB	Address1	Address2	Zip	Language	Mobile_Number
224880833	mhasnat22488...	Melvin	Hussein	M	7/19/1931 12:0...			40360	English	12485554800
224880834	msama22488...	Rachel	Barts	F	8/10/1938 12:0...			58814	English	
224880835	jostatessa224...	Jamie	Cabatuan	F	6/29/1956 12:0...			63061	English	
224880836	dnacy22488...	Chong	Troy	M	12/29/1989 12:0...			32525	English	
224880837	edwedd22488...	Emory	Duckett	M	11/26/1965 12:0...	2151 Dane Court		48884	English	
224880838	glovesax22488...	Greedy	Lawback	M	7/29/1985 12:0...			58205	English	17015886707
224880839	mcquillan22488...	Shane	Gethin	M	8/25/1983 12:0...			21087	English	15/15552404
224880840	dohrmann224...	Owen	Christman	M	8/26/1988 12:0...			88229	English	
224880841	mcnewton22488...	Radio	Deception	F	11/27/1981 12:0...			10217	English	130/265/989
224880842	janekson22488...	Jeanel	Wickrose	M	8/29/1989 12:0...			78154	French	
224880843	swampfire22488...	Holden	England	M	12/6/1973 12:0...	4101511de Avenue		91544	English	
224880844	ldotman22488...	Kashua	Dotman	F				80887	English	12085852373
224880845	lmedlock22488...	Lamar	Medlock	M	10/31/1977 12:0...			61110	French	
224880846	mwakeman22...	Margareta	Wakeman	F	8/29/1986 12:0...			58545	French	
224880847	bludberg22488...	Herbert	Bludberg	M	6/8/1983 12:00			80020	English	
224880848	ppgham22488...	Gene	Golten	M	2/26/1985 12:00			58260	English	16905556143

Data Extension



A table in the Marketing Cloud that stores data for Marketing campaigns.

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Data Extensions



All data extensions are custom tables. They provide a flexible data model that can handle large volumes of data quickly.

Data extensions may contain:

- Subscriber data
 - If they contain data about subscribers and are marked as used for sending, they are called sendable data extensions.
- Other data
 - Such as purchases, web analytics, and even URLs to images that you want to display.
 - These are called non-sendable data extensions.



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Sendable Data Extensions



Sendable data extensions have a send relationship and map to a subscriber. Contacts are added to All Contacts when you send to them.

To make a data extension sendable, it needs:

- Marked "Is Sendable"
- A defined Send Relationship
- An attribute with an email address data type*

Values in sendable data extensions are typically consistent and relate directly back to the contact.

Example: First Name

*An attribute with an email address data type is not required by the system but is needed for sending since data extensions are omni-channel.



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Non-Sendable Data Extensions



Non-sendable data extensions are reference data, things you want to use to personalize emails, but not a person you are sending an email to.

These values tend to change often or do not relate directly to a single contact and apply to many contacts.

Examples include:

- Purchase History
- Web Analytics Information
- Point of Sale Data
- Store Information
- Sales Representative Contact Data
- Product List
- Airport Codes



²⁰

How to Use Non-Sendable Data Extensions



OrderID	FirstName	LastName	CartID
ID1983745	Joe	Smith	34798837
ID2564898	Jill	Jones	98765541



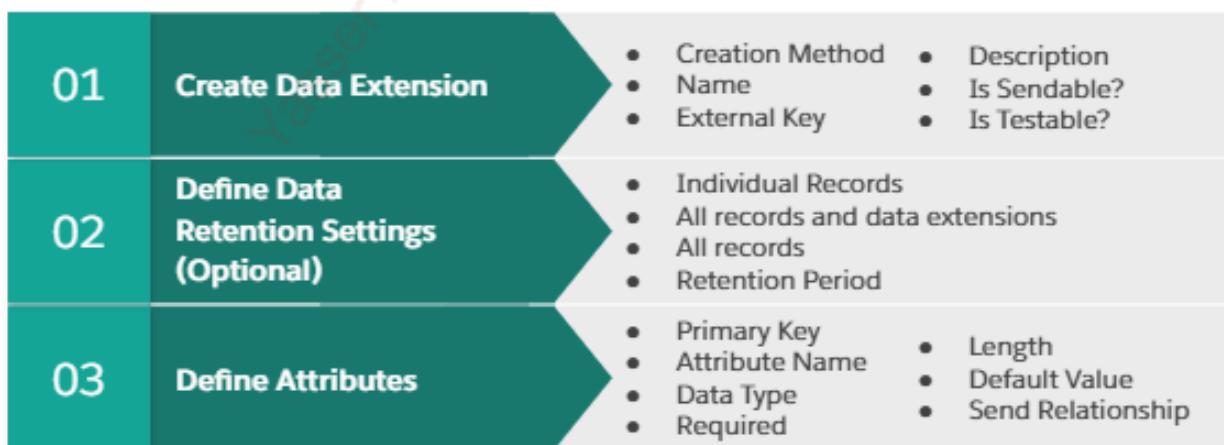
CartID	Item Name	Price
34798837	Hiking Boots	\$69.95
34798837	Thermal Socks	\$24.95
98765541	Roc Sac	\$9.95

Using different tools, a marketer can connect these data extensions through the CartID value and use data from both tables.

- **AMPscript** – a scripting language used for advanced personalization
- **SQL Query Activities** – a segmentation tool used for advanced segmentation
- **Contact Builder**– a point-and-click tool used for data modeling

²¹

Create a Data Extension



Primary Key



Definition

A special column (or a combination of columns) in a Data Extension that can be used to uniquely identify a record.



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Primary Key



- Uniquely identifies a row of data in a Data Extension.
- Not required when creating a Data Extension.
- Enables marketers to add and update data when importing to a Data Extension.
- When an attribute is marked as a Primary Key, that attribute becomes required for all records.
- If no Primary Key is marked, the only way to import data is to Overwrite all data in the Data Extension.



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Send Relationship



- Defines an attribute in the sendable data as an identifier for sending.
- At send time, Marketing Cloud will look for this attribute in the All Subscribers table in the Subscriber Key values.
- If that value doesn't exist, it will add that value as a new Subscriber Key.

BEST PRACTICE:

Be consistent. The identifier should be the same for every Sendable Data Extension. Inconsistency will result in duplicate Contacts.

<input checked="" type="checkbox"/> USED FOR SENDING		
Customer_Number	relates to Subscribers on	Subscriber Key

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All Subscribers



Definition

Database of Record of Email subscriber records for the tenant.

Contains Email Address, Subscriber Key, Status, and any Profile or Preference attributes created in Email Studio.

Every Subscriber in All Subscribers is counted as a Contact in All Contacts.



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Join Me



3-2: Create the NTOAbandonCart Data Extension

Goal:

Create the
NTOAbandonCart Data
Extension for the new
campaign.



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Instructions:

1. Navigate to Data Extensions.
2. Create the NTOAbandonCart Data Extension.
3. Complete the attributes using the provided table.

Your Turn



3-3: Create the NTOCartInfo Data Extension

Goal:

Create the NTOCartInfo
Data Extension for the
new campaign.



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Instructions

1. Navigate to Data Extensions.
2. Create the NTOCartInfo Data Extension.
3. Complete the attributes using the provided table.

Data Extension Best Practices



- Create data extensions only if you need them and just bring in the data that you need. Screen views can get messy when you create a lot of data extensions that you don't need.
 - Ensure the data types that you choose match the data you are bringing in. If you have a date attribute and store it as a text attribute, that can cause issues with segmentation.
 - Make sure that a sendable data extension only has one email address attribute.
 - Filtered data extensions are typically sendable data extensions that have been filtered based off of some sort of criteria.
 - Make sure the Subscriber Key is stored as text.

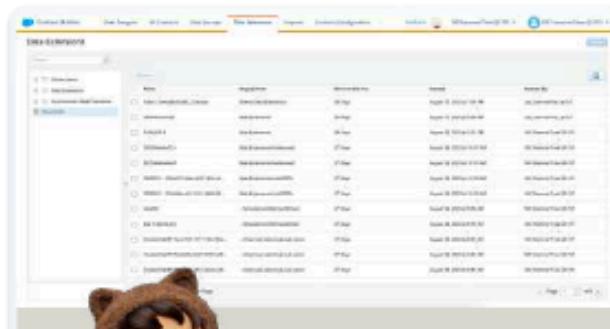


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Recycle Bin for Data Extensions



- View all data extensions that have been deleted within the account in the last 30 days.
 - Restore deleted data extension within 30 days of the deletion date directly from Contact Builder.



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Goal:

Review your instance of Marketing Cloud.



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Homework



Log into your Marketing Cloud Account and answer the following:

- Does your account use Contact Builder?
- What's your Unique ID (Contact Key)?
- Where does your data come from?
- What does your data model look like in Contact Builder?
- What data would you like to have in Marketing Cloud that you don't already have?

Data Management

Lesson Topics

1. Define data management & structure terminology.
2. Import data.
3. Apply a simple data model concept to a relevant scenario.
4. Create targeted segments using data segmentation tools.



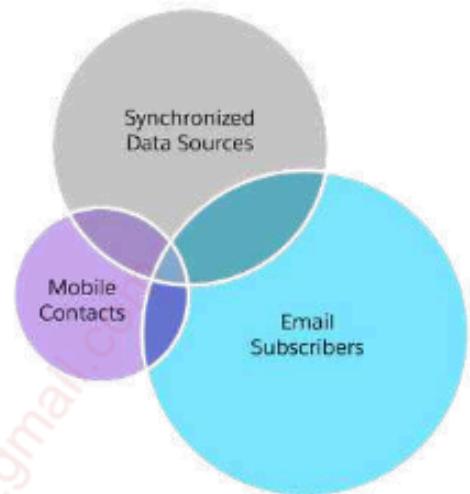
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Contact Count Determinations



- Marketing Cloud combines contacts from all previously mentioned sources based on the ContactKey value.
- All Contacts are counted even if they have never been sent a message.
- Contact records without a ContactKey value default to the address of the respective channel sending the message, such as an email address, mobile number, or MobilePush device ID.
- Different data sources can include duplicate contact records, so the total contact count in a tenant can differ from the total contacts contained in all available data sources.



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Data Management: Import Data



"Isabelle wanted to make sure that we import this data for our Abandoned Cart Campaign. Let me know if you need any help."



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How are Contacts Added to Contact Builder?



You can add a contact to Marketing Cloud via several different methods:

- Imported file
- Marketing Cloud applications
- Contacts, Leads, and Users added via Synchronized Data Sources
- SOAP or REST API call

A contact is also a person to whom you sent a message via any Marketing Cloud channel, including these examples:

- Journey Builder
- MobileConnect
- MobilePush
- GroupConnect



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Ways to Import a File in Contact Builder



Option 1
Imports
in Contact Builder



Option 2
Automate Import
via Automation Studio

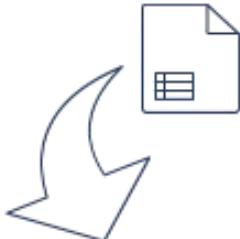


Option 3
Via API

Imports in Contact Builder



Take data from an external
data source



Loads it into a
Data Extension

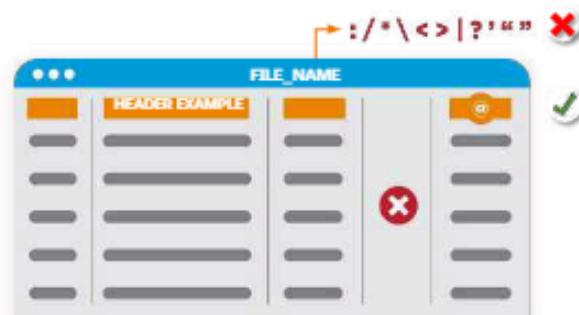
Data Extension									
Event Address	Customer Address	First Name	Last Name	Address	City	State	Zip	Phone	Notes
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1001	Student	Student	999-111-1111	Learn	IL	60601	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1002	Student	Student	999-111-1111	Learn	IL	60602	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1003	John	Doe	999-111-1111	Learn	IL	60603	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1004	John	Doe	999-111-1111	Learn	IL	60604	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1005	John	Doe	999-111-1111	Learn	IL	60605	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1006	John	Doe	999-111-1111	Learn	IL	60606	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1007	John	Doe	999-111-1111	Learn	IL	60607	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1008	John	Doe	999-111-1111	Learn	IL	60608	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1009	John	Doe	999-111-1111	Learn	IL	60609	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1010	John	Doe	999-111-1111	Learn	IL	60610	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1011	John	Doe	999-111-1111	Learn	IL	60611	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1012	John	Doe	999-111-1111	Learn	IL	60612	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1013	John	Doe	999-111-1111	Learn	IL	60613	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1014	John	Doe	999-111-1111	Learn	IL	60614	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1015	John	Doe	999-111-1111	Learn	IL	60615	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1016	John	Doe	999-111-1111	Learn	IL	60616	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1017	John	Doe	999-111-1111	Learn	IL	60617	Learning	
https://www.google.com/search?rlz=1C1GCEU_enUS882US882&q=site%3A%2F%2Fwww.google.com	1018	John	Doe	999-111-1111	Learn	IL	60618	Learning	

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Prepare Your File

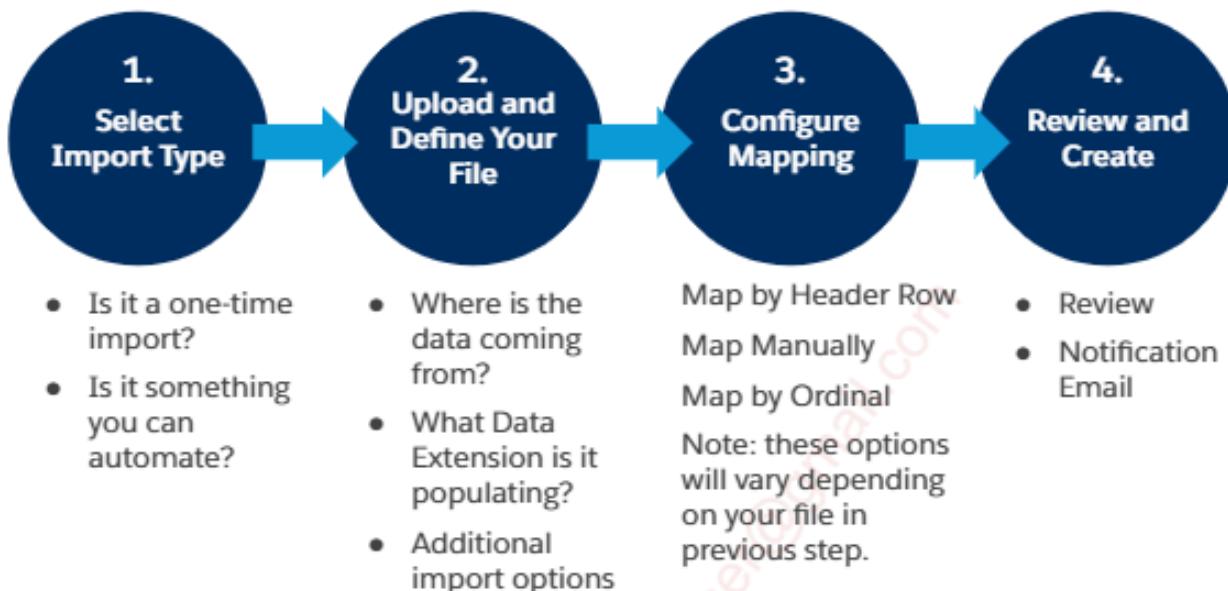


- When naming your files, do not use any of the following characters:
\\ : * < > | ? "
 - Delete columns from your file that are not being used in the import.
 - A header row is recommended.
 - De-duplicate your file prior to importing the data.
 - For large imports, run a test import prior to importing the full set of records.



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Steps for Importing using Contact Builder Imports



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Where is the Data Coming From?

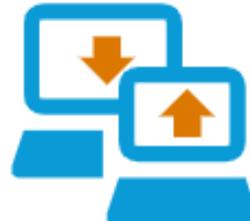


File Location



Marketing Cloud SFTP

SSH File Transfer Protocol (SFTP) is a method for transferring data from one computer to another over the Internet. The SFTP server uses SFTP as a secure and flexible file transfer protocol.



Marketing Cloud SFTP

Another DE

Data Extension
Sample Data Extension

Data Extension
Sample Data Extension

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Additional Import Options



Will the import be adding new data, updating existing data, or overwriting existing data?

- Add*
- Update*
- Add and Update*
- Overwrite

*Primary Key Required

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Import Type: Add Data



Existing Data Extension	Email Address	Subscriber Key	First Name	Address
	joe@joesworld.com	11111	Joe	123 Someplace Dr.
	jill@jillsworld.com	22222	Jill	567 Golden Dr.

New File to Import	Email Address	Subscriber Key	First Name	Address
	joe@joesworld.com	11111	Joe	123 Someplace Dr.
	jill@jillsworld.com	22222	Jill	457 Fancy Dr.
	dan@dansworld.com	33333	Dan	2786 Walker Ct.

Final Data Extension	Email Address	Subscriber Key	First Name	Address
	joe@joesworld.com	11111	Joe	123 Someplace Dr.
	jill@jillsworld.com	22222	Jill	567 Golden Dr.
	dan@dansworld.com	33333	Dan	2786 Walker Ct.

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Import Type: Update data

Existing Data Extension	Email Address	Subscriber Key	First Name	Address
	joe@joesworld.com	11111	Joe	123 Someplace Dr.
	jill@jillsworld.com	22222	Jill	567 Golden Dr.

New File to Import	Email Address	Subscriber Key	First Name	Address
	joe@joesworld.com	11111	Joe	123 Someplace Dr.
	jill@jillsworld.com	22222	Jill	457 Fancy Dr.
	dan@dansworld.com	33333	Dan	2786 Walker Ct.

Final Data Extension	Email Address	Subscriber Key	First Name	Address
	joe@joesworld.com	11111	Joe	123 Someplace Dr.
	jill@jillsworld.com	22222	Jill	457 Fancy Dr.

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Import Type: Add and Update Data

Existing Data Extension	Email Address	Subscriber Key	First Name	Address
	joe@joesworld.com	11111	Joe	123 Someplace Dr.
	jill@jillsworld.com	22222	Jill	567 Golden Dr.

New File to Import	Email Address	Subscriber Key	First Name	Address
	joe@joesworld.com	11111	Joe	123 Someplace Dr.
	jill@jillsworld.com	22222	Jill	457 Fancy Dr.
	dan@dansworld.com	33333	Dan	2786 Walker Ct.

Final Data Extension	Email Address	Subscriber Key	First Name	Address
	joe@joesworld.com	11111	Joe	123 Someplace Dr.
	jill@jillsworld.com	22222	Jill	457 Fancy Dr.
	dan@dansworld.com	33333	Dan	2786 Walker Ct.

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Import Type: Overwrite

Existing Data Extension	Email Address	Subscriber Key	First Name	Address
	joe@joesworld.com	11111	Joe	123 Someplace Dr.
	jill@jillsworld.com	22222	Jill	567 Golden Dr.

New File to Import	Email Name	Subscriber Key	First Name	Address
	jon@jonsworld.com	44444	Jon	324 Simmons Ct.
	erica@ericasworld.com	55555	Erica	456 Whitcomb Ave.
	liz@lizsworld.com	66666	Liz	8900 Roosevelt Rd.

Final Data Extension	Email Name	Subscriber Key	First Name	Address
	jon@jonsworld.com	44444	Jon	324 Simmons Ct.
	erica@ericasworld.com	55555	Erica	456 Whitcomb Ave.
	liz@lizsworld.com	66666	Liz	8900 Roosevelt Rd.

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Configure Mapping: Map by Header Row

How will the external data be mapped to the attributes in the data extension?

Map by Header Row

- Used when reference file contains a header row and naming conventions match exactly.
- The import updates the columns in the data extension with the information in the import file by matching the column headings.

The screenshot shows the 'Import Into Data Extension' dialog box. Under 'Select Mapping Type', 'Map by Header Row' is selected. The main area displays a grid mapping columns from 'MTOBauerUsers.csv' to 'Data Extension's Columns'. The mapping is as follows:

From Column	To Column
Email	EmailAddress
FirstName	FirstName
LastName	LastName
Address1	Address1
Address2	Address2
City	City

At the bottom right, the 'Reference File' summary is shown: Rows: 31, Columns: 11, Data: 11 types.

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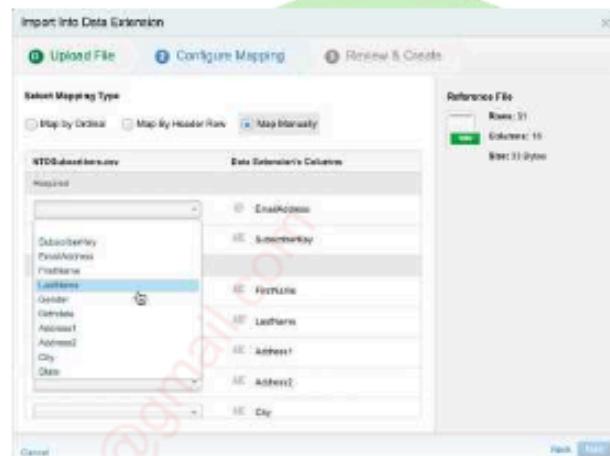
Configure Mapping: Map Manually



How will the external data be mapped to the attributes in the data extension?

Map Manually

- Used when source file does NOT have column headings or when naming conventions do NOT match exactly.
- To manually map an import file column, select the column name in the drop-down next to the data extension column.



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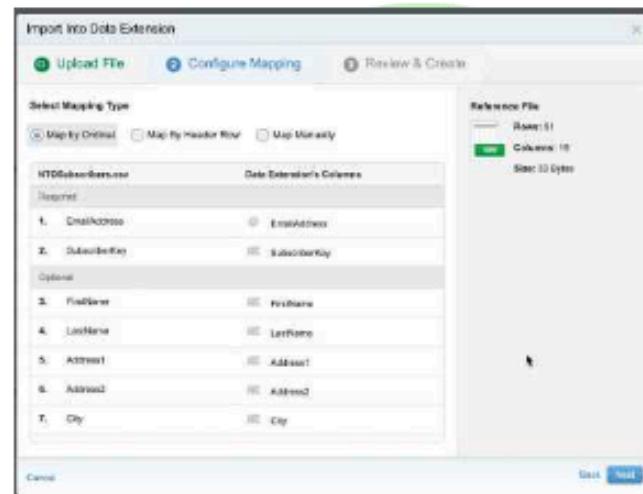
Configure Mapping: Map by Ordinal



How will the external data be mapped to the attributes in the data extension?

Map by Ordinal

- Used when source file does not have column headings or when naming conventions do not match exactly.
- The import updates the first column in the data extension with the first column in the import file, the second column with the second column, and so on.



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Join Me



3-4: Create an Import to the NTOAbandonCart Data Extension

Goal:

Import data to the NTOAbandonCart Data Extension.



Instructions:

1. Navigate to the NTOAbandonCart Data Extension.
2. Import Data to the NTOAbandonCart Data Extension.
3. Verify the number of records imported.

Your Turn



3-5: Create an Import to the NTOCartInfo Data Extension

Goal:

Import data to the NTOCartInfo Data Extension.



Instructions:

1. Navigate to the NTOCartInfo Data Extension.
2. Import Data to the NTOCartInfo Data Extension.
3. Verify the number of records imported.

Contact De-Duplication



- Contacts count only one time.
- Contacts are deduplicated based on the Contact Key value.
 - For example, two records with different Contact Key values and the email address jai@example.com count as two unique contacts.
- Add, Update, and Add and Update import types also automatically de-duplicate based on the Primary Key value.
- Avoid duplicates by assigning consistent Contact Keys throughout the MC
- Inconsistent Contact Keys will result in duplicate contacts.



Contact Key: 1234
jai@example.com



Contact Key: 3456
jai@example.com

These are counted as
two different contacts
based on Contact Key.



Contact Delete

You can manually delete individual contacts and you can delete lists of contacts, but the Contact Delete feature must be enabled.

Here are some things to consider:

- When possible, do not delete contacts.
- When you delete a contact, you are losing all of the contact's tracking data and everything about the contact.
- If you want to remove unengaged subscribers:
 - Unsubscribe the contacts from individual channels rather than deleting them.
 - Consider moving them to a different journey or data extension.
- We recommend that you keep a log of the contacts deleted to prevent reintroduction.



RESOURCE:
Search Salesforce Help for
“Contact Delete Best Practices
in Contact Builder.”

Data Management

Lesson Topics

1. Define data management & structure terminology.
2. Import data.
3. Apply a simple data model concept to a relevant scenario.
4. Create targeted segments using data segmentation tools.

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Data Management: Data Modeling

“Thanks so much for creating those new Data Extensions. Can you make sure they're connected to the Contact so that we can use them in Journeys?”

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Data Designer



- ✓ Consolidate and organize data from any source.
- ✓ Build data relationships.
- ✓ Relate the data to the contact record using Attribute Groups.
- ✓ Use the data to drive customer journeys.
- ✓ Use the Customer ID from a contact record to link to another data extension that contains product and shipping information.



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What is an Attribute?



Definition

- 1 Attributes represent a single piece of information about a contact.
 - 2 Two types of attributes:
 1. Profile Attribute: Data about the subscriber.
 2. Preference Attribute: A choice for a declarative statement.
- For example: Do you wish to receive HTML emails? Value stored is a Boolean value.



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Attribute Groups



Subscriber Table

ContactKey	EmailAddress	First_Name	Last_Name
224990833	Haskellfamily@gmail.com	Melvin	Haskell
224990873	Haskellfamily@gmail.com	Sherry	Haskell
224990835	Lamar.medlock@mac.com	Lamar	Medlock

Purchase Table

CustomerID	OrderID	SKU	Quantity	UnitPrice
224990833	13445	1019100	1	95.00
224990833	13446	1054430	1	180.00
224990835	13447	1113100	1	73.00

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Purchases
Attribute
Group

Linking Data Extensions in Attribute Groups



Best Practices:

- Link attribute groups to Contacts using the Contact Key value.
- Don't link using an email address attribute when the Contact Key or Subscriber Key value is available.
- If you must create a link using the email address, create a text attribute containing the email address, and link using that value.
- Think through your data models.
- Only bring contacts in if you know you're going to use them.
- Set up your data correctly. Think through the data you need and how it's going to connect to the other data in the Marketing Cloud.



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Join Me



3-6: Create the Abandon Cart Attribute Group

Goal:

Add the Abandon Cart Attribute Group to Northern Trail Outfitter's data model.



Instructions:

1. Navigate to Data Designer and create the Abandon Cart Attribute Group in Contact Builder.
2. Link the NTOAbandonCart Data Extension to Contact Data.
3. Link the NTOAbandonCart Data Extension to the NTOCartInfo Data Extension.
4. Link the NTOProductCatalog Data Extension to NTOCartInfo.

Data Sources



System	Synchronized	Custom
Salesforce Marketing Cloud		
Email Application		
Mobile Application		

The screenshot shows the Contact Builder interface with the 'Data Sources' tab selected. It displays three system data sources: 'Salesforce Marketing Cloud' (17 linked attributes), 'Email Application' (15 linked attributes), and 'Mobile Application' (112 linked attributes). Each data source has a 'View Attributes' button.

Data Sources in Contact Builder are where your account stores and locates contact attributes.

Three Types:

- **System:** Data structures created by default within the Salesforce Marketing Cloud.
- **Synchronized:** Use Marketing Cloud Connect to move data from Salesforce CRM into the Salesforce Marketing Cloud.
- **Custom:** Collect attributes used with Contact Builder and visually link those attributes to a specific data source.



Synchronized Data Sources

Continually Stream CRM Data into the Marketing Cloud.



Select all the Salesforce data you want available in Marketing Cloud including custom objects.

Continuous data refresh keeps the Marketing Cloud up-to-date.

Use any of your data in marketing messages and campaigns.

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Connecting the Clouds

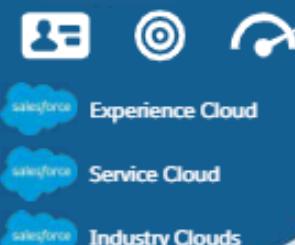
How does it all work?



Marketing
Cloud Connect



Sales Cloud



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What You Can Do with Marketing Cloud Connect



Synchronize



CRM data to
Marketing Cloud

Connect



Journey Builder with
Sales & Service Clouds

Personalize



Messages & decisions
using CRM data

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Connect the Clouds

Connect the clouds in six steps.



1. Review the prerequisites.
2. Install the managed package.
3. Configure CRM settings.
4. Configure Marketing Cloud setup.
5. Finalize the configuration.
6. Test the connection.

Step 1 Step 2 Step 3 Step 4 Step 5 Step 6



Review Prereqs Install managed packages Configure CRM settings Configure Marketing Cloud Finalize configuration Test

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Data Management

Lesson Topics

1. Define data management & structure terminology.
2. Import data.
3. Apply a simple data model concept to a relevant scenario.
4. Create targeted segments using data segmentation tools.

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Data Management: Segmentation

“Now that you've imported data, we need to make sure we're targeting the right people with our Abandon Cart Campaign.”

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NTO's Abandon Cart Campaign



Email 1 Low Value Cart
Abandon = True
CartTotal less than \$300



Email 1 High Value Cart
Abandon = True
CartTotal greater than or equal to \$300

Wait



No Opens Follow Up
Did they open the
email?

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Definition



Segmentation

- 1 Division into segments or parts.
- 2 Filters or criteria applied to a list or data extensions in order to send targeted messages to subscribers.



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How Segmentation Drives Results



According to marketing research, not only does email audience segmentation ensure you're delivering the right message to the right person at the right time, it also leads to:

- ✓ Higher click-through rates
- ✓ Higher conversion rates
- ✓ Better email deliverability
- ✓ Lower unsubscribe rates
- ✓ Higher-quality email analytics



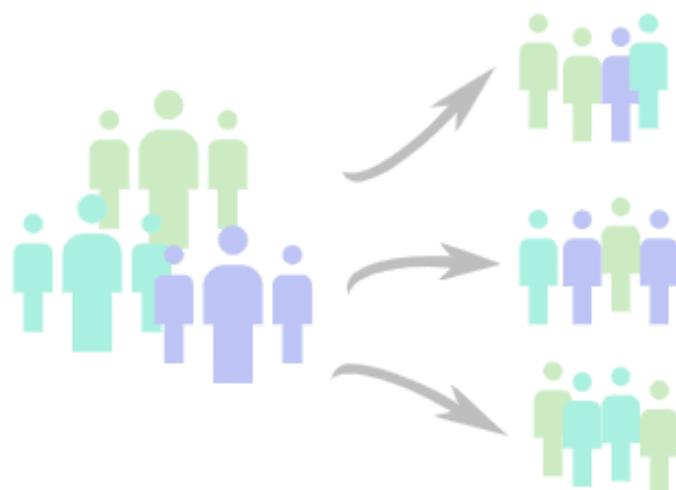
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Common Ways to Segment



Here are some common ways that companies segment their data:

- Interests
- Behavior
- Purchase history
- Subscriber status
- Previous email interactions



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Marketing Cloud Segmentation Tools



Data Filters



SQL Queries



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What is a Data Filter?



- A **data filter** is a group of criteria that segments a single data extension.
- It is **declarative** and uses an easy drag-and-drop interface.
- Can be stand-alone or associated with a specific data extension.
- If it is stand-alone, it can be used as an audience for segmentation at send time.
- The resulting data extension is created as a part of applying the filter.
- Are built in Email Studio, since they are specific to email audiences.
- Can create random segments for testing.



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What is a SQL Query Activity?



- **SQL Query Activities** let you request and retrieve data and place it in a data extension.
- It is **programmatic**, and you must know SQL (Structured Query Language), since it's the language that defines the criteria.
- Marketing Cloud places the results in a data extension.
- You must create the data extension for the results before defining and executing the query activity.
- The SQL query activity in Automation Studio initiates queries.

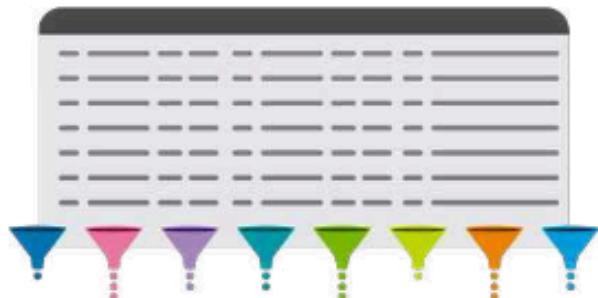


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Random Segments



- A random sample is a selection of a subset of data from a specific data extension.
- You can define the sample based on a percentage of subscribers from the list (Segment A must contain 25% of the subscribers from the Newsletter data extension), or a certain number of subscribers from the data extensions (Segment A must contain 1250 subscribers).



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Filtered Segments



- The filter expression is based on attributes in the data source.
- The filter expression is applied to the data source to create the segment.
- Each filter expression can contain multiple AND & OR statements.
- Filter expressions can be simple or complex to meet campaign needs.



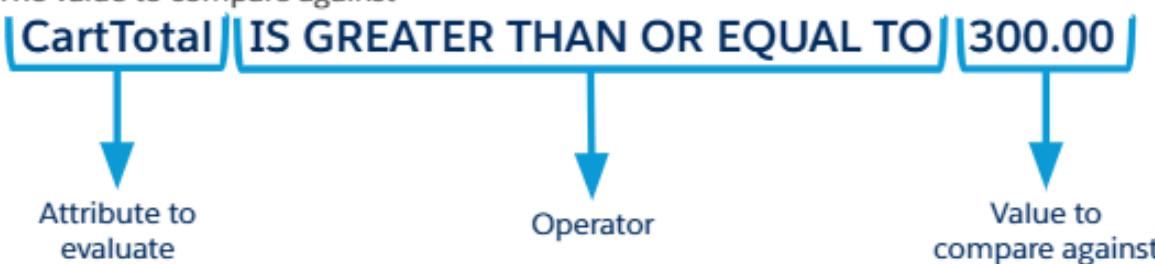
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Creating Data Filters



Data Filters are composed of:

1. The attribute to evaluate
2. The operator to use to compare the values
3. The value to compare against



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Filter Operators and Data Types



- Filter Operators are dependent on data types.
- For example, you can only filter text by text, and you can only filter numbers by numbers.
- Operators will differ from data type to data type.
- Dates can be filtered using relative date values in order to make filters reusable.

The screenshot shows two examples of filter operators:

- Text Operators:** A screenshot of the "Purchase" filter criteria. The operator dropdown is set to "is equal to". The list of operators includes:
 - is equal to
 - is not equal to
 - is greater than
 - is greater than or equal to
 - is less than
 - is less than or equal to
 - starts with
 - does not start with
 - begins with
 - ends with
 - does not contain
 - is empty
 - is not empty
- Numeric Operators:** A screenshot of the "Loyalty Points" filter criteria. The operator dropdown is set to "is equal to 0". The list of operators includes:
 - is equal to
 - is not equal to
 - is greater than
 - is greater than or equal to
 - is less than
 - is less than or equal to
 - is empty
 - is not empty
 - is null

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Tips and Tricks for Dates



Choosing the right operator:

	Past	Future
Specific Date	Today Minus	Today Plus
Range of Dates	Is Before	Is After

Tip:

Use Account Time Zone to ensure the filter is run evaluating Today in the time zone in Account Settings.

The screenshot shows the "Create Filter" interface with the following details:

- Filter Name:** OptInDate
- Operator:** is equal to
- Value:** Today - 1 Day
- Account Time Zone:** checked
- Buttons:** Save, Save & Close, Clear All, Save As Filter, Help

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