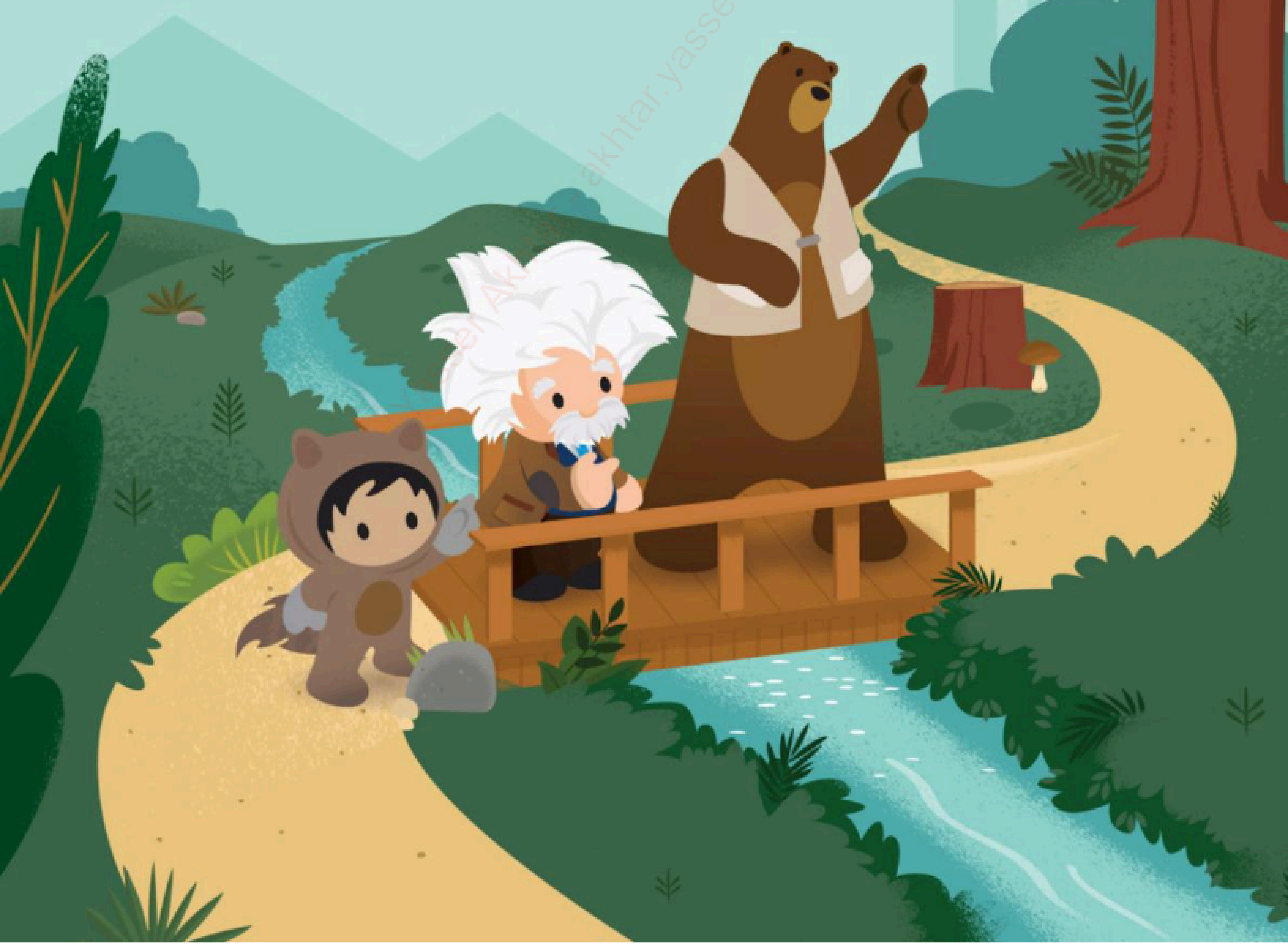
EXERCISE GUIDE

Build and Analyze Customer Journeys using Marketing Cloud

SF-MKT101-64.0v1-EN-EG



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EXERCISE GUIDE

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Log Into the Marketing Cloud

1. Navigate to the Marketing Cloud login page.
    a. Open an Internet browser (Chrome or Firefox preferred).
    b. Enter **mc.exacttarget.com** into the browser's address bar.
    c. Press **Enter**.
2. Log in with your username and password.
    a. Enter your username: `Region_MKT101_####`
    b. Hit **Next**.
    c. Enter your password: `journey@1`
    d. Click **Log In**.

Download Assets from the Course Landing Page

1. Navigate to the session landing page.
    a. Open an internet browser (Chrome or Firefox preferred).
    b. Enter http://sfdc.co/mkt101 into the browser's address bar.
    c. Press Enter.
2. Download the session assets.
    a. Click the button to download the session assets.
    b. Place in an easily accessible folder.

Exercise 1-1: Tour the Marketing Cloud

Goal: Familiarize yourself with the Marketing Cloud user interface and navigation.

Instructions:

1. Tour the Marketing Cloud Dashboard.
    a. The default screen upon logging in is the Marketing Cloud Dashboard.
    b. The dashboard displays an overview of the features available within your account and any associated activities, such as past or scheduled email sends, automations, and journeys.
    c. Notice the toolbar at the top of the screen. It contains links to access the Calendar and Campaigns.
2. Find your MID (Member ID).
    a. Hover over the account name in the right corner.
    b. Make note of the MID that appears in the drop-down.
3. Tour the App Switcher.
    a. Look at the icons below the toolbar. This is the App Switcher. The app switcher displays the apps enabled for your account. You can switch between all apps included in your account.
    b. A lock symbol over a channel icon indicates that you cannot use an app otherwise available to an account.
    c. An info symbol over a channel icon indicates an unprovisioned app for the account.
    d. Toggle the account to display My Apps.
    e. Toggle the account back to All Apps.
4. Tour Studios and Builders.
    a. In the App Switcher, hover over **Email Studio** and select **Email**.
    b. Look at the Toolbar. These options are specific to the Email Studio Application. The list of available features in the toolbar contains only those items you have permission to access.
    c. On the Overview screen, you can see recent items and filter those items by type. You can see recent sends and configure shortcuts to common tasks.
    d. Hover over the blue cloud next to Email in the left corner. Notice the App Switcher appears.
    e. Hover over Mobile Studio and select Mobile Connect.

f. Look at the Toolbar. These options are specific to the Mobile Studio Applications.
g. On the Overview screen, you can see key metrics on messaging.
h. Note that there are Administration options for the different Studios. These will be different depending on the Studio.
i. Hover over the blue cloud in the left corner. Notice the App Switcher appears.
j. Click the Salesforce Marketing Cloud logo to return to the Dashboard.

Exercise 1-2: Marketing Cloud Trust Site

Goal: Use the Marketing Cloud Trust Site to check system status.

Instructions:

1. Navigate to the Marketing Cloud Trust Site.
   a. In the upper right corner, hover over your **User Name** and click **Trust** in the drop down.
   b. Click **Status** next to Marketing Engagement.
2. Search and review status.
   a. In the search, type `DB48`.
   b. Click **Enter** to search.
   c. In the Search Results, click `DB48`.
   d. Note the Instance Details in the right menu.
   e. Click the History tab. Note that you can adjust the timeframe for your search.
   f. Click the Maintenance tab. Review the releases and maintenance that are complete.

   Note: We search the database because we are working within demo accounts that return no results when we search by MID. Search your account MID for homework to see your specific information.

Exercise 2-1: Tour User Preferences

Goal: Explore user settings and management.

Instructions:

1. Tour Cloud Preferences
    a. Hover over your **User Name** in the right corner.
    b. Click **Cloud Preferences** in the drop-down.
    c. As a User, this is where you manage your personal settings.
    d. Note the options in the Toolbar.
    e. Click the **Default Login Preference** tab.
    f. Note the options for Default login.
    g. Click the **User Settings** tab.
    h. Click **Edit**.
    i. Change the Time Zone to **your local time zone**.
    j. Click **Save**.
2. Tour User Administration
    a. Hover over your **User Name** in the right corner.
    b. Click **Setup** in the drop-down.
    c. Navigate to **Users > Roles** in the left menu.
    d. Click the **Administrator** Role.
    e. Click **Expand All**, and explore the available options.
    f. Navigate to **Business Units** in the left menu.
    g. Click **your business unit**.
    h. Explore the settings and options.
    i. Navigate to **Users > Users** in the left menu.
    j. Note the options in the Toolbar.
    k. As an Administrator, this is where you manage Users.
3. Change the Account Time Zone
    a. Navigate to **Company Settings > Account Settings** in the left menu.
    b. Click **Edit**.
    c. Change the Time Zone to **your local time zone**.
    d. Click **Save**.

Exercise 2-2: Create a Send Classification

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

Instructions:

1. Create a Sender Profile.
    a. In Setup, navigate to **Feature Settings > Email Studio > Sender Profiles**.
    b. Click **Create**.
    c. Name: `NTO Commercial Sender Profile`
    d. Sender: **Use Specified Information**
    e. From Name: `NTO`
    f. From Email: `marketing@sfmctraining.com`
    g. Click **Save**.
2. Create a Send Classification.
    a. In Setup, navigate to **Feature Settings > Email Studio > Send Classifications**.
    b. Click **Create**.
    c. Name: `NTO Commercial`
    d. CAN-SPAM Classification: **Commercial**
    e. Sender Profile: **NTO Commercial Sender Profile**
    f. Delivery Profile: **Default**
    g. Send Priority: **Normal**
    h. Click **Save**.

Exercise 2-3: Scavenger Hunt

Goal: Audit your account.

Instructions:

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

Question	Your Answer
How many Journeys are in your account?	
How many Automations are in your account? How many Automations have run within the last 7 days?	
How many Data Extensions are in your account?	
How many pieces of Content are in your account? How many pieces of Content are shared?	
What Roles are assigned to your Business Unit?	
What are your URL Expiration Settings? When do URLs expire after an email is sent? When URLs expire, are they redirected to a System Default URL or a Custom Defined URL?	

Exercise 3-1: Tour Contact Builder

Goal: Familiarize yourself with Contact Builder.

Instructions:

1. Navigate to Contact Builder.
    a. In App Switcher, hover over **Salesforce Marketing Cloud**.
    b. Hover over **Audience Builder** and select **Contact Builder**.
2. Explore Data Designer.
    a. On the **Data Designer** tab, look at the toolbar at the top of the screen.
    b. Note the different options in the **toolbar**.
    c. Look at the **constellation view**.
    d. Note the various **Attribute Groups**.
3. Explore All Contacts.
    a. Click **All Contacts** in the toolbar.
    b. In the side menu, explore the **filters**.
4. Explore Data Sources.
    a. Click **Data Sources** in the toolbar.
    b. Note the **System Data Sources** available.
    c. Click **Synchronized** in the options. What do you see?
    d. Click **Custom** in the options. Does NTO have any custom data sources?
5. Explore Data Extensions.
    a. Click **Data Extensions** in the toolbar.
    b. Note the available Data Extensions on the overview screen.
6. Explore Imports.
    a. Click **Imports** in the toolbar.
    b. Note the **Import Activities** created in your account.
7. Explore Contacts Configuration.
    a. Click **Contacts Configuration** in the toolbar
    b. Note the various **settings** that can be enabled.

Exercise 3-2: Create the NTOAbandonCart Data Extension

Goal: Create the NTOAbandonCart Data Extension for the new campaign.

Instructions:

1. Navigate to Data Extensions.
   a. In the toolbar, click **Data Extensions**.
      i. Note: If you see a pop up, click Get Started.
2. Create the NTOAbandonCart Data Extension in Contact Builder.
   a. Click **Create**.
      i. Name: `NTOAbandonCart`
      ii. Description: `For NTO Abandon Cart campaign communications`
      iii. Is Sendable: **Checked**
   b. Click **Next**.
   c. On the Data Retention Policy screen, click **Next**.
3. Complete the Attributes using the table below.

Primary Key	Name	Data Type	Required	Length	Default
	EmailAddress	EmailAddress	X	254	
X	CustomerID	Text	X	50	
	FirstName	Text		50	NTO Lover
	LastName	Text		50	
	CartTotal	Decimal		6.2	
	IsAbandon	Boolean		N/A	
	Interest	Text		50	Camping
	AbandonDate	Date	X	N/A	
	Gender	Text		50	

   a. Define the Send Relationship: **CustomerID** relates to **Subscriber Key**.
   b. Click **Complete**.
   c. Click **OK**.

Exercise 3-3: Create the NTOCartInfo Data Extension

Goal: Create the NTOCartInfo Data Extension for the new campaign.

Instructions:

1. Navigate to Contact Builder > Data Extensions.
2. Create the NTOCartInfo Data Extension.
    a. In the toolbar, click **Data Extensions**.
    b. Click **Create**.
        i. Name: `NTOCartInfo`
        ii. Description: `Cart info for NTO Abandon Cart campaign communications`
    c. Click **Next**.
    d. On the Data Retention Policy screen, click **Next**.
3. Complete the attributes using the table below.

Primary Key	Name	Data Type	Required	Length	Default
	CustomerID	Text	X	50	
	ProductName	Text		100	
	SKU	Text		50	
	UnitPrice	Decimal		6.2	
	IsAbandon	Boolean		N/A	
	CartTotal	Decimal		6.2	
	AbandonDate	Date	X	N/A	

    a. Click **Complete**.
    b. Click **OK**.

Exercise 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.
    a. In the toolbar, click **Data Extensions**.
    b. Select the **NTOAbandonCart** Data Extension.
    c. Click the **Records** tab.
2. Import Data to the NTOAbandonCart Data Extension.
    a. Complete the Import Data to a Data Extension fields using the following:
        i. Click **Import**.
        ii. Verify **Import Into Data Extension** is selected and click **OK**.
        iii. Click Choose File
        iv. In the assets for the course, navigate to **Student Assets > Data > NTOAbandonCart.csv**.
        v. Delimiter: **Comma**
        vi. Date Format: **English**
        vii. Import Type: **Add and Update**
        viii. Skip rows in the import file with bad data: **Checked**
    b. Click **Next**.
    c. Keep as default: **Map by Header Row**.
    Note: Verify all the columns in the file were correctly mapped to the columns in the data extension. If any columns were not mapped correctly, manually map the columns.
    d. Click **Next**.
    e. In notifications, type your email address in the field.
    f. Click **Finish**.
    g. Click **Done**.
3. Verify **55 records** have been imported.

Exercise 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.
    a. In the toolbar, click **Data Extensions**.
    b. Select the **NTOCartInfo** Data Extension.
    c. Click the **Records** tab.
2. Import Data to the NTOCartInfo Data Extension.
    a. Complete the Import Data to a Data Extension fields using the following:
        i. Click **Import**.
        ii. Verify **Import Into Data Extension** is selected and click **OK**.
        iii. Click **Choose File**.
        iv. Locate **NTOCartInfo.csv** in the course files folder.
        v. Select and upload **NTOCartInfo.csv**.
        vi. Delimiter: **Comma**
        vii. Date Format: **English**
        viii. Import Type: **Overwrite**
        ix. Skip rows in the import file with bad data: **Checked**
    b. Click **Next**.
    c. Keep as default: **Map by Header Row**.
    Note: Verify all the columns in the file were correctly mapped to the columns in the data extension. If any columns were not mapped correctly, manually map the columns.
    d. Click **Next**.
    e. In notifications, type `your email address` in the field.
    f. Click **Finish**.
    g. Click **Done**.
3. Verify **95 records** have been imported.

Exercise 3-6: Create the Abandon Cart Attribute Group

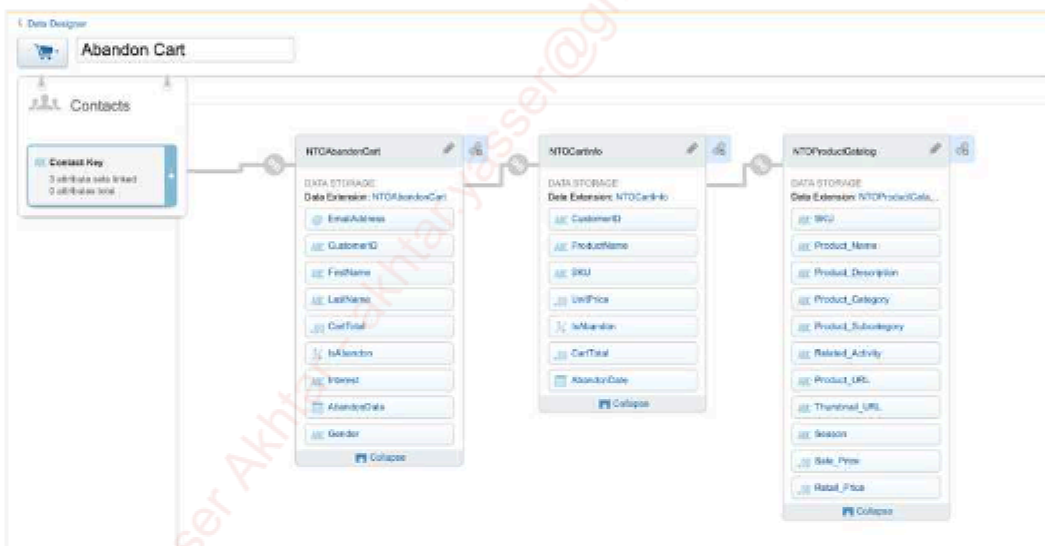
Goal: Add the Abandon Cart Attribute Group to Northern Trail Outfitters data model.

Instructions:

1. From Contact Builder, navigate to Data Designer and create the Abandon Cart Attribute Group.
    a. In the toolbar, click **Data Designer**.
    b. Click **+ Create Attribute Group**.
        i. Name: `Abandon Cart`
    c. Under the Select Attribute Group Icon options, choose the **Shopping Cart** icon and click **Create**.
2. Link NTOAbandonCart Data Extension to Contact Data
    a. Click **Link Data Extensions**.
    b. In the Select Data Extensions to link area on the right-hand side, click **Data Extensions > NTOAbandonCart**.
    c. In the NTOAbandonCart attribute set, click **CustomerID**.
    d. In the Customer data attribute set, select **Contact Key**.
    e. Verify the relationship for NTOAbandonCart is **One**.
    f. Click **Save**
    g. **Note:** A warning will appear when you click Save. When editing an existing data model, always evaluate how the changes can impact your current sending processes. The Abandon Cart data is new and will not impact any current campaigns.
    h. Click **Done**.
3. Link the NTOAbandonCart Data Extension to NTOCartInfo Data Extension.
    a. Click **the Add Relationship icon** on the NTOAbandonCart Data Extension.
    b. In the Select Data Extensions to link area on the right-hand side, click **Data Extensions > NTOCartInfo**.
    c. In the NTOCartInfo data attribute set, select **CustomerID**.
    d. In the NTOAbandonCart attribute set, click **CustomerID**.
    e. Change the relationship for NTOCartInfo to **Many**.
    f. Click **Save**.

   g. Click **Done**.

4. Link the NTOProductCatalog Data Extension to NTOCartInfo Data Extension.
   a. Click **the Add Relationship icon** on the NTOCartInfo Data Extension.
   b. In the Select Data Extensions to link area on the right-hand side, click **Data Extensions | NTOProductCatalog**.
   c. In the NTOProductCatalog data attribute set, select **SKU**.
   d. In the NTOCartInfo attribute set, click **SKU**.
   e. Change the relationship for NTOCartInfo to **Many**.
   f. Change the relationship for NTOProductCatalog to **One**.
   g. Click **Save**.
   h. Click **Done**.



Exercise 3-7: Create the LowValueCart Segment

Goal: Create a Filtered Data Extension to find all subscribers from the NTOAbandonCart Data Extension who have a cart total of less than $300.

Instructions:

1. Navigate to Data Extensions in Email Studio to the NTOAbandonCart Data Extension.
   a. In the **App Switcher**, hover over **Salesforce Marketing Cloud**.
   b. Hover over **Email Studio** and select **Email**.
   c. Hover over **Subscribers** in the toolbar and select **Data Extensions**.
   d. Locate the **NTOAbandonCart** Data Extension.
   e. From the Data Extension Overview, click the **Filter icon** in the Actions column.
2. Create the Filtered Data Extension criteria using the following table.

Field	Drag the **CartTotal** field to the canvas.
Operator	Select **is less than**
Value	Type `300`
Field	Drag the **IsAbandon** field to the canvas.
Operator	Keep as default: **is**
Value	True

   a. Click **Save & Build**.
3. Define the Filtered Data Extension properties.

Name	Type `LowValueCart`
Description	Leave blank
External Key	Leave blank
Location	Keep as default: **Data Extensions**

   a. Click **Save**.
4. Verify that there are **45 records** in the filtered data extension.

Exercise 3-8: Create the HighValueCart Segment

Goal: Create a Filtered Data Extension to find all subscribers from the NTOAbandonCart Data Extension who have a cart total of greater than $300.

Instructions:

1. Create the HighValueCart Data Extension.
    a. Click **Data Extensions** in the left corner.
    b. Locate the **NTOAbandonCart** Data Extension.
    c. From the Data Extension Overview, click the **Filter icon** in the Actions column.
    d. Create the Filtered Data Extension criteria using the following table:

Field	Drag the **CartTotal** field to the canvas.
Operator	Select **is greater than or equal to**
Value	Type `300`
Field	Drag the **IsAbandon** field to the canvas.
Operator	Keep as default: **is**
Value	True

    e. Click **Save & Build**.
2. Define the Filtered Data Extension properties.

Name	Type `HighValueCart`
Description	Leave blank
External Key	Leave blank
Location	Keep as default: **Data Extensions**

    a. Click **Save**.
3. Verify that there are **10 records** in the filtered data extension.

Exercise 3-9: Refresh the LowValueCart Data Extension

Goal: Manually refresh the LowCartValue Data Extension.

Instructions:

1. Navigate to Data Extensions in Email Studio.
2. Manually refresh the LowValueCart Data Extension
   A. Click **Data Extensions** in the left corner.
   B. Locate the **LowValueCart** Data Extension.
   C. Click the **Refresh** icon in the Actions column.
   D. Click **OK**.

Exercise 3-10: Create the NTO Abandon Cart Query Activity

Goal: Create a Query Activity using SQL to find all subscribers with abandoned carts.

Instructions:

1. Navigate to Automation Studio.
    a. In App Switcher, hover over Salesforce Marketing Cloud.
    b. Hover over Journey Builder and select **Automation Studio.**
    c. Click the **Activities** tab in the toolbar.
    d. Click **Create Activity**.
    e. Select **SQL Query**.
    f. Click **Next**.
2. Create the Query Activity using the following:
    a. Name: `Abandon Cart SQL Query`
    b. External Key: `AbandonCartQuery####`
    c. Description: `Used to join abandon cart campaign data.`
    d. Click **Next**.
    e. In the Query editor, type the following:
    ```
    SELECT nto.SubscriberKey as CustomerID,
    nto.EmailAddress, nto.FirstName, nto.LastName,
    nto.Interest, nto.Gender, cart.IsAbandon,
    cart.CartTotal, cart.AbandonDate
    FROM NTOSubscribers nto
    INNER JOIN NTOCartInfo cart
    ON nto.SubscriberKey = cart.CustomerID
    WHERE cart.IsAbandon = 'True'
    ```
        i. Click **Validate Syntax**.
        Note: If there are any syntax errors related to your table or attribute names, you can compare your query to the tables and fields in the left column.
    f. Click **Next**.
        i. Target Data Extension: **NTOAbandonCart**
        ii. Data Action: **Overwrite**
    g. Click **Next**.
    h. Click **Finish**.
3. Run the Abandon Cart Query Activity.
    a. In the left panel, click **SQL Query**.

   b. Locate **Abandon Cart SQL Query** and click the **drop-down** arrow.
   c. Select **Run Once**.
   d. Click **Run**.
4. Navigate to **NTOAbandonCart** data extension and verify **55 records**.
   a. Hover over **Salesforce Marketing Cloud**, hover over Audience Builder, and return to **Contact Builder**.
   b. Select **Data Extensions** in the toolbar.
   c. Select **NTOAbandonCart**.
   d. Select the **Records** tab to view the values. Note the updated data for the Gender and Interest fields for the subscribers.

Exercise 4-1: Review NTO's Welcome Email

Goal: Analyze NTO's Welcome Email for design best practices.

Instructions:

1. Navigate to Content Builder and locate the Welcome Email
    a. In the App Switcher, hover over **Salesforce Marketing Cloud**.
    b. Hover over Content Builder and click **Content Builder**.
    c. In the left menu, click the **Shared** tab.
    d. Navigate to **Shared Content > NTO Global Assets > Emails**
2. Analyze the Welcome Email
    a. In the workspace, click **Welcome** email.
    b. In the upper right corner, click the drop-down to the right of the Edit button and select **Duplicate**.
    c. In Location, click **Move**.
    d. Click the **Local Tab**.
    e. Click the **Content Builder folder**.
    f. Click **Save**.
    g. In Sharing, click **Change**.
    h. Select **My Business Unit**.
    i. Click **Save**.
    j. Click **Save and Edit**.
    k. Examine the email for email design best practices.
    l. In the upper left corner, click < Back.

Exercise 4-2: Create Abandon Cart Campaign Folders

Goal: Create a new folder structure in Content Builder.

Instructions:

1. Navigate to the Content Builder.
    a. Click on the **Local** tab in **Content Builder**.
    b. Right-click the **Content Builder** folder in the left panel.
2. Create Abandon Cart Campaign Folders.
    a. Select **Create Folder**.
    b. Type `Abandon Cart` and click **Create**.
    c. Right-click the **Abandon Cart** folder in the left panel.
    d. Select **Create Folder**.
    e. Type `Images` and click **Create**.
    f. Right-click the **Abandon Cart** folder in the left panel.
    g. Select **Create Folder**.
    h. Type `Content Blocks` and click **Create**.
    i. Right-click the **Abandon Cart** folder in the left panel.
    j. Select **Create Folder**.
    k. Type `Emails` and click **Create**.

Exercise 4-3: Create Welcome Campaign Folders

Goal: Create a new folder structure in Content Builder.

Instructions:

1. Navigate to Content Builder.
   a. Right-click the **Content Builder** folder in the left panel.
2. Create Welcome Campaign Folders
   a. Select **Create Folder**.
   b. Type `Welcome` and click **Create**.
   c. Right-click the **Welcome** folder in the left panel.
   d. Select **Create Folder**.
   e. Type `Images` and click **Create**.
   f. Right-click the **Welcome** folder in the left panel.
   g. Select **Create Folder**.
   h. Type `Content Blocks` and click **Create**.
   i. Right-click the **Welcome** folder in the left panel.
   j. Select **Create Folder**.
   k. Type `Emails` and click **Create**.

Exercise 4-4: Upload Abandon Cart Content

Goal: Upload image assets for NTO's Abandon Cart campaign.

Instructions:

1. Navigate to the Abandon Cart Images Folder.
    a. In the left panel in Content Builder, expand the **Abandon Cart** folder.
2. Upload images to the folder.
    a. Click the **Images** folder.
    b. Click **+ Select Action**.
    c. Click **Upload**.
    d. Navigate to **Student Assets > Abandon Cart > Images** subfolder on your Desktop.
    e. Select all of the images in the folder to upload (5 images).
    f. Click **Upload and Publish**.
    g. Click **Sort Uploaded Content**.

Exercise 4-5: Upload Welcome Content

Goal: Upload image assets for NTO's Welcome campaign.

Instructions:

1. Navigate to the Welcome Images Folder.
    a. In the left panel in Content Builder, expand the **Welcome** folder.
    b. Click the **Images** folder.
2. Upload images to the folder.
    a. Click **+ Select Action**.
    b. Click **Upload**.
    c. Navigate to **Student Assets > Welcome > Images** subfolder on your Desktop.
    d. Select all of the images in the folder to upload (3 images).
    e. Click **Upload and Publish**.
    f. Click **Sort Uploaded Content**.

Exercise 4-6: Tag Abandon Cart Content

Goal: Tag image assets for NTO's Abandon Cart campaign.

Instructions:

1. Tag Abandon Cart Assets.
   a. Navigate to **Abandon Cart > Images** in the left navigation pane.
   b. Select the checkbox for **5 Content Items**.
   c. Click **Tags**.
   d. Click into the tag search box.
   e. Click **+ Create New**.
      i. Name: `Abandon Cart ####`
      ii. Description: `For NTO's Abandon Cart Campaign items`
   f. Click **Save**.
   g. In All Tags, check the box next to **Abandon Cart**.
   h. Click **Done**.
2. Tag camping and tent assets.
   a. Deselect the box next to **Mens_Hiking.png** and **Women's Hiking**.
   b. Ensure the boxes next to **Mens_Camping.png**, **Womens_Camping.png** and **Default-Content.png** are selected.
   c. Click **Tags**.
   d. Click into the tag search box.
   e. Click **+ Create New**.
      i. Name: `Camping ####`
      ii. Description: `Content for people who shop for camping gear`
   f. Click **Save**.
   g. Click into the tag search box.
   h. Click **+ Create New**.
      i. Name: `Tents ####`
      ii. Description: `Content with tents`
   i. Click **Save**.
   j. In All Tags, check the boxes next to **Camping** and **Tents**.
   k. Click **Done**.

3. Tag hiking assets.

   a. Deselect the box next to **Womens_Camping.png**, **Mens_Camping.png**, and **Default-Content.png**.
   b. Select the boxes next to **Womens_Hiking.png** and **Mens_Hiking.png**.
   c. Click **Tags**.
   d. Click into the tag search box.
   e. Click **+ Create New**.
      i. Name: `Hiking ###`
      ii. Description: `Content for people who shop for hiking gear`
   f. Click **Save**.
   g. In All Tags, check the box next to **Hiking**.
   h. Click **Done**.
4. Test tags.
   a. **Refresh** your browser window.
   b. In the upper right corner, click the **Filter Icon**.
   c. Under **Content Types**, select the box next to **Source File**.
   d. Select the box next to **Template**.
   e. Deselect **Template**.
   f. Under Tags, select the box next to **Tents**.

Exercise 4-7: Tag Abandon Cart Content

Goal: Tag image assets for NTO's Abandon Cart campaign.

Instructions:

1. Tag Abandon Cart assets.
    a. Navigate to **Abandon Cart > Images** in the left navigation pane.
    b. Select the checkbox for **5 Content Items**.
    c. Click **Tags**.
    d. In All Tags, check the box next to **Abandon Cart**.
    e. Click **Done**.
2. Tag camping and tent assets.
    a. Deselect the box next to **Mens_Hiking.png** and **Womens_Hiking.png**.
    b. Ensure the boxes next to **Mens_Camping.png**, **Womens_Camping.png** and **Default-Content.png** are selected.
    c. Click **Tags**.
    d. In All Tags, check the boxes next to **Camping** and **Tents**.
    e. Click **Done**.
3. Tag hiking assets.
    a. Deselect the box next to **Womens_Camping.png**, **Mens_Camping.png**, and **Default-Content.png**.
    b. Select the boxes next to **Womens_Hiking.png** and **Mens_Hiking.png**.
    c. In All Tags, check the box next to **Hiking**.
    d. Click **Done**.
4. Test tags.
    a. **Refresh** your browser window.
    b. In the upper right corner, click the **Filter Icon**.
    c. Under **Content Types**, select the box next to **Source File**.
    d. Select the box next to **Template**.
    e. Deselect **Template**.
    f. Under Tags, select the box next to **Tents**.

Exercise 4-8: Create the NTO Template

Goal: Create a template that can be used for NTO Communications.

Instructions:

1. Configure the template properties.
    a. Click **Create** in the upper right corner.
    b. Hover over **Email Template** and select **From Existing Template**.
    c. On the **Basic** tab, select the **Hero 1 Column**.
    d. Click **Select**.
    e. **Note:** If a Welcome to Template Builder pop up appears, click **Get Started**.
2. Populate Banner with NTO Image.
    a. Click on the **Content** tab.
    b. In the search, type NTO and choose **in All Content** from the drop-down.
    c. Drag **NTO White.png** to the top content area.
    d. Click **Scale to Fit**.
    e. Alt Text: `Northern Trail Outfitters Logo`
    f. Click **Done Editing**.
3. Configure the Template Style.
    a. Click on the **Design** tab.
    b. Open the **Body** menu.
        i. Change the font to **size 14**.
        ii. Change the font color to **#000000**.
    c. Open the Primary Title (H1) menu.
        i. Change the font color to **#000000**.
    d. Open the Buttons menu.
        i. Change the background color to **#009DDC**.
        ii. Change the Corner Radius to **30px**.
        iii. Change the border color to **#009DDC**.
4. Edit the Social Follow Block.
    a. At the bottom of the email template, click on the Social Follow content block.
    b. Facebook: Type `www.facebook.com/ntoutfitters`
    c. X: Type `www.x.com/ntoutfitters`
    d. Pinterest: Type `www.pinterest.com/ntoutfitters`
    e. Instagram: Type `www.instagram.com/ntoutfitters`

   f. Click **Done Editing**.
5. Change the Link content block.
   a. In the email template, click on the content block that contains three links to edit.
   b. Delete two of the links, leaving one link.
   c. Double click the remaining **LINK**.
      i. Link URL: Type `https://www.northerntrailoutfitters.com.`
      ii. Link Text: Type `NTO Website.`
      iii. Link Color: Type **#009DDC**.
      iv. Select **include underline on hyperlink**.
      v. Title: Type `Go here for deals and promotions`
      vi. Tracking Alias: Type `Website Footer.`
      vii. Click **OK**.
   d. Click **Done Editing**.
6. Edit Bottom Text content block
   a. In the email template, click Bottom Text content block to edit.
   b. Delete the text in the content block.
   c. Type `Copyright 2024 Northern Trail Outfitters, inc. All Rights Reserved.`
   d. Expand the toolbar, and **select all**.
   e. Change font size to 11.
   f. Click **Done Editing**.
7. Save NTO Template.
   a. Click the **Save** drop-down in the upper right corner.
   b. Click **Save and Exit**.
   c. Name: `NTO Template NEW [Month][Year]`
      i. Ex: NTO Template NEW August 2024
   d. Folder: Content Builder
   e. Description: `Template for NTO communications.`
   f. Click **Save**.

Exercise 4-9: Create the Complete Profile Content Block

Goal: Create the Complete Profile Content Block to reuse throughout NTO's email communications.

Instructions:

1. Create and Configure a Layout Block.
    a. In the upper right corner, click **Create**.
    b. Hover over **Content Blocks** and click **Layout**.
    c. Click **Two Column (Top)** and click **Select**.
    d. Click the **Configure** tab.
    e. Change the **Vertical Split** to **15%/85%**.
2. Configure the Right Text Content Block.
    a. Click on the **Content** Tab.
    b. From Blocks, drag the **Text** block to top right content area.
    c. Locate the **Welcome** folder on your Desktop.
    d. Open Text for **Text for Welcome Email.txt**.
    e. Copy the following text:
    ```
    Let's get to know each other.
    Take a minute to fill out your profile and communications
    preferences so we can send you the most relevant and timely
    offers and discounts.
    ```
    f. Paste it into the dialog box on the left side of the screen.
    g. **Highlight** the text.
    h. Click the **Font drop down** and select **Arial**.
    i. Change the **font size** to **14**.
    j. **Highlight** the "Let's get to know each other."
    k. Click the **Bold** icon to bold the text.
    l. Click **Done Editing**.
3. Configure Left Image content block.
    a. Click the **Content** tab.
    b. In the Search, **type** Welcome.
    c. In the drop-down, click **in All Content**.
    d. Drag **welcome-step1-mountains.png** to the left content area.
    e. **Scale to Fit** should be deselected.
    f. Alt Text: `Image of Mountains`

   g. Click **Done Editing**.
4. Configure Button content block.
   a. Click **Blocks** tab.
   b. Drag **Button** content block into the **bottom block** of the layout content area.
   c. In the **Button Text** box, type `Complete Your Profile.`
   d. Change the Background color to `#009DDC.`
   e. Change the Corner Radius to **30px**.
   f. Change the Border color to `#009DDC.`
   g. Click the **Link to** drop-down and select **Other**.
   h. In the **Link URL** text box, type `%%profile_center_url%%.`
   i. In the Title text box, type `Go here to complete your profile information.`
   j. In Tracking Alias, type `Link to Profile Center.`
   k. Click **Done Editing**.
5. Save the Complete Profile Content Block.
   a. In the upper right corner, click the **Save** drop down and click **Save and Exit**.
   b. Name: `Complete Profile Content Block`
   c. Select the Content Block subfolder within the Welcome Folder.
   d. Click **Save**.

Exercise 4-10: Create Dynamic Content Blocks

Goal: Create content blocks for use in Dynamic Content in the Welcome Email.

Instructions:

1. Create and Configure Join myNTO Rewards Content Block.
    a. In the upper right corner, click **Create**.
    b. Hover over **Content Blocks** and click **Layout**.
    c. Click **Two Column (Top)** and click Select.
    d. Click the **Configure** tab.
    e. Change the **Vertical Split** to **15%/85%**.
2. Configure the Right Text Content Block
    a. Click on the **Content** Tab.
    b. From Blocks, drag the **Text** block to top right content area.
    c. Locate the **Welcome** folder on your Desktop.
    d. Open Text for **Text for Welcome Email.txt**.
    e. Copy the following text:
    ```
    Join myNTO for exclusive discounts.
    Exclusive offers and rewards have never been so easy!  Join
    myNTO and start earning points on every purchase.
    ```
    f. Paste it into the dialog box on the left side of the screen.
    g. **Highlight** the text.
    h. Click the **Font drop down** and select **Arial**.
    i. Change the **font size** to **14**.
    j. **Highlight** the "Join myNTO for exclusive discounts."
    k. Click the **Bold** icon to bold the text.
    l. Click **Done Editing**.
3. Configure Left Image content block.
    a. Click the **Content** tab.
    b. In the Search, type Welcome.
    c. In the drop-down, click **in All Content**.
    d. Drag **welcome-step1-boot.png** to the left content area.
    e. Confirm **Scale to Fit** checkbox is de-selected. If not, de-select.
    f. Alt Text: Image of Boot
    g. Click **Done Editing**.

4. Configure Button content block.
    a. Click **Blocks** tab.
    b. Drag **Button** content block into the bottom block of the layout content area.
    c. In the Button Text box, type `Join myNTO`.
    d. Change the Background color to `#009DDC`.
    e. Change the Corner Radius to **30px**.
    f. Change the Border color to `#009DDC`.
    g. In the Link URL text box, type `northerntrailoutfitters.com`.
    h. In the Title text box, type `Learn more about myNTO Rewards`.
    i. In Tracking Alias, type `Link to Join myNTO Rewards`.
    j. Click **Done Editing**.
5. Save the Join myNTO Rewards Content Block
    a. In the upper right corner, click the **Save** drop down and click **Save and Exit**.
    b. Name: `Join myNTO Rewards Content Block`
    c. Folder: Welcome - Content Blocks
    d. Click **Save**.
6. Create Start Earning Rewards Content Block.
    a. Click the drop-down for the **Join myNTO Rewards** content and select **Duplicate**.
    b. In the Name field type `Start Earning Rewards Content Block`.
    c. Click **Save and Edit**.
7. Configure the Right Text Content Block
    a. Click the right text content block to edit.
    b. Open Text for **Text for Welcome Email.txt**.
    c. Copy the following text:
    ```
    Start earning rewards with myNTO.
    As an exclusive member of myNTO, you're on your way to
    earning points on every NTO purchase.  Keep it up!
    ```
    d. In the dialog box on the left side, delete the current text.
    e. Paste the copied text into the dialog box on the left side.
    f. Highlight the text.
    g. Click the **Font drop down** and select **Arial**.
    h. Change the **font size** to **14**.
    i. **Highlight** the "Start earning rewards with myNTO."
    j. Click the **Bold** icon to bold the text.

   k. Click **Done Editing**.

8. Configure Button content block.
   a. Click the **Button** block.
   b. In the Button Text box, type `Earn Points.`
   c. In the Link URL, leave as northerntrailoutfitters.com.
   d. In the Title text box, type `Start earning points.`
   e. In Tracking Alias, type `Link to myNTO Rewards Points.`
   f. Click **Done Editing**.
   g. Click the **Save** drop-down and select **Save and Exit**.

Exercise 4-11: Create NTO's Welcome Email

Goal: Create a Welcome Email for all subscribers who opt-in to NTO communications.

Instructions:

1. Define Email Properties.
    a. Click **Welcome >Emails** Folder.
    b. Click **Create** in the upper right corner.
    c. Select **Email Message**.
    d. In the Create Email dropdown, select **Template**.
    e. Click the **Saved** tab.
    f. Select **NTO Template NEW [Month][Year]**.
    g. Click **Select**.
    h. In Define Email Properties, complete the fields:
        i. Name: `Welcome Email NEW [Month][Year]`
        ii. Ex: Welcome Email NEW August 2024
        iii. Description: Leave blank
        iv. Location: Leave Default
        v. Click **Next**.
2. Define the Subject Line using the following:
    a. Click in the **Subject line** box.
    b. In the Subject Line, type `Welcome to Northern Trail Outfitters.`
    c. Click **Done**.
3. Define the Preheader using the following:
    a. In the Preheader, type `Let's get to know each other.`
    b. Click **Done**.
4. Define Hero Content Area.
    a. Select the main content area.
    b. Click the **Content** tab.
    c. In the Search, **type** `Welcome.`
    d. In the drop-down, click **in All Content**.
    e. Drag **welcome-step1-hero.png** to the Hero Image content area.
    f. Click **Done Editing**.
5. Define Text Content Area.
    a. Add Personalization

i. Click **Text** content block.
ii. Highlight **H1 Text**.
iii. Click **Personalization Selector**.
iv. Click **Choose New Data Source**.
v. Click **Data Extensions** folder.
vi. Select **NTOSubscribers**.
vii. Click **Ok**.
viii. Click **Personalization Selector**.
ix. Click **FirstName**.
x. Add a **comma** (,) after %%FirstName%%.

b. Add Text
   i. Highlight the **Body** of the **Text** content area.
   ii. Locate the **Welcome** folder on your Desktop.
   iii. Open **Text for Text for Welcome Email.txt**.
   iv. Copy the following text:
      `Hello and welcome! Thanks for signing up by OptInSource - you're officially registered with NTO. Expect to hear from us about the latest outdoor news and all of our best offers and discounts. In the meantime, here's a few things to get you started...`
   v. Paste it in the dialog box on the left side of the screen.
   vi. Highlight the **Body** of the **Text** content area.
   vii. Click **Align Left**.
   viii. Click **HTML Editor**.
   ix. Locate the word **OptInSource** in the HTML and highlight it.
   x. Click the **AMPScript** Formatting dropdown.
   xi. Click **Lowercase**.
   xii. Click **Done Editing**.

6. Define Button Content Area.
   a. Click the **Button** content area.
   b. Button Text, type `Latest News.`
   c. Link URL, type `northerntrailoutfitters.com`
   d. Title, type type `Go here to find out the latest news from NTO.`
   e. Tracking Alias, type `Link to NTO Website`
   f. Click **Done Editing**.
   g. Click **Done Editing**.

7. Add Complete Profile Content Block
    a. In the left menu, from the **Content** tab, delete the search value.
    b. Find and drag the **Complete Profile Content Block** to the email below the Latest News Button.
    c. Click **Done Editing**.
8. Create Dynamic Content Area.
    a. In the left menu, click the **Blocks** tab.
    b. Drag **Dynamic Content** block under Complete Your Profile button.
    c. Under **Dynamic Content Block Options** keep **"Keep content blocks up-to-date"** selected.
    d. Click **Browse**. Under "Upload or Select Existing Content"
    e. Select **Join myNTO Rewards Content Block**.
    f. Click **Select**.
    g. Click **Default Content**.
    h. Type `Join myNTO`
    i. Hit **Enter**.
    j. Click **Create Rule 1**.
    k. Select **Data Extension or Audience**.
    l. Click OK.
    m. Click **Data Extensions** and select **NTOSubscribers**.
    n. Click **OK**.
    o. Drag **myNTO** from the Attribute column to the canvas.
    p. Select **is equal to True**.
    q. Click **Select** from the top center of the page.
    r. Select **Start Earning Rewards Content Block**.
    s. Click **Select**.
    t. Click **Save**.
    u. Click **Rule 1**.
    v. Type `myNTO Rewards Member`
    w. Hit **Enter**.
    x. Click **Done Editing**.
9. Click the **Save** drop-down and select **Save and Exit**.

Exercise 4-12: Create Abandon Cart Low Value Email

Goal: Create the Abandon Cart Low Value Email for the Abandon Cart Campaign.

Instructions:

1. Define Email Properties.
    a. Expand the **Abandon Cart** Folder and click the **Emails** folder.
    b. Click **Create** in the upper right corner.
    c. Select **Email Message**.
    d. In the Create Email dropdown, select **Template**.
    e. Click the **Saved** tab.
    f. Select **NTO Template NEW [Month][Year]**.
    g. Click **Select**.
    h. In Define Email Properties, complete the fields:
        i. Name: `Abandon Cart Low Value`
        ii. Description: Leave blank
        iii. Location: Leave default
        iv. Click **Next**.
2. Define the Subject Line using the following:
    a. Click in the **Subject line** box.
    b. In the Subject Line, type `Don't Forget About Us`
    c. Click **Done**.
3. Define the Preheader using the following:
    a. In the Preheader, type `Something was left in your shopping cart`
    b. Click **Done**.
4. Define Hero Dynamic Content Area.
    a. Select the **main content area**.
    b. Hover over the **top image content block**.
    c. Click the drop-down arrow and click **Delete**.
    d. Confirm **Delete** in the pop up.
    e. Click the **Blocks** tab and drag **Dynamic Content** above the Text block.
    f. Leave **Keep blocks up-to-date** as default.
    g. In the Default Content area, click **Browse**.
    h. Select **Default-Content.png**
    i. Click **Select**.
        i. Create Rule 1

1. Click **+Create Rule 1**.
2. Click **Data Extensions** or Audience and click **Ok**.
3. Click the **Data Extensions** folder and click **NTOAbandonCart** and click **Ok**.
4. Click **Select** at the top of the screen to select the content.
5. Click **Womens_Camping.png**
6. Click **Select**.
7. Click **Rule 1** and change the text to `Women's Camping`.
8. From the Library panel on the left, drag **Interest** to the Filter workspace.
9. Type `camping` in the text field.
   a. Rule should read: "Interest is equal to camping"
10. From the Library panel on the left, drag **Gender** to the Filter workspace.
11. Type `female` in the text field.
    a. Rule should read: "Gender is equal to female"
12. Verify the operator is AND.
13. Click **Save**.

ii. Create Rule 2
1. Click **+Create Rule 2**.
2. Click **Select** at the top of the screen to select the content.
3. Click **Mens_Camping.png**
4. Click **Select**.
5. Click **Rule 2** and change the text to `Men's Camping`.
6. From the Library panel on the left, drag **Interest** to the Filter workspace.
7. Type `camping` in the text field.
   a. Rule should read: "Interest is equal to camping"
8. From the Library panel on the left, drag **Gender** to the Filter workspace.
9. Type `male` in the text field.
   a. Rule should read: "Gender is equal to male"
10. Verify the operator is AND.
11. Click **Save**.

iii. Create Rule 3
1. Click **+Create Rule 3**.

            2. Click **Select** at the top of the screen to select the content.
            3. Click **Womens_Hiking.png**
            4. Click **Select**.
            5. Click **Rule 3** and change the text to `Women's Hiking`.
            6. From the Library panel on the left, drag **Interest** to the Filter workspace.
            7. Type `hiking` in the text field.
                a. Rule should read: "Interest is equal to hiking"
            8. From the Library panel on the left, drag **Gender** to the Filter workspace.
            9. Type `female` in the text field.
                a. Rule should read: "Gender is equal to female"
            10. Verify the operator is AND.
            11. Click **Save**.
        iv. Create Rule 4
            1. Click **+Create Rule 4**.
            2. Click **Select** at the top of the screen to select the content.
            3. Click **Mens_Hiking.png**
            4. Click **Select**.
            5. Click **Rule 4** and change the text to `Men's Hiking`.
            6. From the Library panel on the left, drag **Interest** to the Filter workspace.
            7. Type `hiking` in the text field.
                a. Rule should read: "Interest is equal to hiking"
            8. From the Library panel on the left, drag **Gender** to the Filter workspace.
            9. Type `male` in the text field.
                a. Rule should read: "Gender is equal to male"
            10. Verify the operator is AND.
            11. Click **Save**.
            12. Click **Done Editing**.
5. Define Text Content Area.
    a. Add Personalization
        i. Click the **Text** content block.
        ii. Highlight H1 Text.
        iii. Click **Personalization Selector**.

iv. Click **Choose New Data Source**.
v. Click the **Data Extensions** folder.
vi. Select **NTOAbandonCart**
vii. Click **Ok**.
viii. Click **Personalization Selector**.
ix. Click **FirstName**.
x. Add a comma (,) after **%%FirstName%%**.
xi. After the comma, type `Don't Forget About Us`
xii. Place your cursor after the comma and click enter to move **Don't Forget About Us** to a new line.

b. Add Text

i. Highlight the **Body** of the **Text** content area.
ii. Locate the **Abandon Cart** folder on your Desktop.
iii. Open **Text for AbandonCart.txt**.
iv. Copy the following text:
```
Something was left in your shopping cart and we wanted
to remind you before it's gone. Return to your cart to
have another look. We've even included a special offer
to help you with your decision.
```
v. Paste it in the dialog box on the left side of the screen.
vi. Highlight the **Body** of the **Text** content area.
vii. Click the **Font drop down** and select **Arial**.
viii. Change the **font size** to **14**.
ix. Click **Align Left**.
x. Click **Done Editing**.

6. Define Coupon Content Area.
   a. Drag and drop the **Free Form** content block below the button content block.
   b. Locate the **Abandon Cart** folder on your Desktop.
   c. Open **HTML for Coupon** and copy the text.
   d. In the left pane, select the **HTML Editor** tab.
   e. Paste the HTML into the editor.
   f. Click **Block Settings**.
   g. Change the padding on all sides to **20px**.
   h. Click **Done Editing**.
7. Delete Button Content Area.
   a. Hover over the **button content block**.
   b. Click the drop-down arrow and click **Delete**.

c. Confirm **Delete** in the pop up.
d. Click the **Save** drop-down and select **Save and Exit**.

Exercise 4-13: Create Abandon Cart High Value Email

Goal: Create the Abandon Cart High Value Email for the Abandon Cart Campaign.

Instructions:

1. Duplicate the Abandon Cart Low Value Email
    a. In the Content Builder workspace, locate the **Abandon Cart Low Value** email.
    b. Click the **drop down** to the right of the email.
    c. Click **Duplicate**.
    d. Name: `Abandon Cart High Value`
    e. Click **Save and Edit**.
2. Edit the Abandon Cart High Value email
    a. From the Blocks Tab, drag and drop Code Snippet below the coupon content block.
    b. Locate the **Abandon Cart** folder on your Desktop.
    c. Open **AMPscript for High Value.txt** and copy the text.
    d. In Content Builder, paste the HTML into the editor.
    e. Click **Done Editing**.
    f. Click the **Save** drop-down and select **Save and Exit**.

Exercise 5-1: Create Test Data

Goal: Create data for testing email sends.

Instructions:

1. Create a Test Data Extension
   a. In App Switcher, hover over **Salesforce Marketing Cloud**.
   b. Hover over **Audience Builder** and select **Contact Builder**.
   c. Click **Data Extensions** in the toolbar.
2. Copy the NTOSubscribers Data Extension.
   a. Locate the **NTOSubscribers** Data Extension.
   b. Scroll over to the right and in the Actions column, hover over **>>** and click **Copy**.
   c. Complete the Copy Data Extension using the following:
      i. Name: `Test`
      ii. External Key: Leave blank
      iii. Description: Leave blank
      iv. Click **Save**.
      v. Click **View Now.**
      vi. Under Type: `Sendable`, click on Edit.
      vii. Verify the **Used for testing** box is selected.
      viii. Click **Save**.
3. Add records to the Test Data Extension.
   a. Click the **Records** tab.
   b. Click **+ Add Record**.
   c. Create a Subscriber record using the following:

EmailAddress	Type `your email address`
SubscriberKey	Type `today's date, your initials, and your favorite color` (ex: 0503SLHrainbow)
FirstName	Type `your first name`
LastName	Type `your last name`
Address1	Leave blank
Address2	Leave blank

City	Leave blank
State	Leave blank
Zip	Leave blank
Mobile	Leave blank
Birthdate	Leave blank
OptInSource	Type `Website`
Gender	Type `any gender`
Interest	Type `Training`
myNTO	Select **True**
OptInDate	Enter today's date (MM/DD/YY)

d. Click **Save**.
e. Click **+ Add Record**.
f. Create a Subscriber record using the following:

EmailAddress	Type `your email address`
SubscriberKey	Type `today's date, your initials, and your favorite animal` (ex: 0503SLHdog)
FirstName	`Isabelle`
LastName	`Manager`
Address1	Leave blank
Address2	Leave blank
City	Leave blank
State	Leave blank
Zip	Leave blank
Mobile	Leave blank
Birthdate	Leave blank

OptInSource	Type `Social`
Gender	Type `any gender`
Interest	Type `Hiking`
myNTO	Select **False**
OptInDate	Enter today's date (MM/DD/YY)

   g. Click **Save**.

4. Add a record to the NTOSubscribers Data Extension
   a. Click **Data Extensions** in the toolbar.
   b. Click **NTOSubscribers**.
   c. Click the **Records** tab.
   d. Click **+ Add Record**.
   e. Create a Subscriber record using the following:

EmailAddress	Type `your email address`
SubscriberKey	Type `today's date, your initials, and your favorite season` (ex: 0503SLHfall)
FirstName	Type `your first name`
LastName	Type `your last name`
Address1	Leave blank
Address2	Leave blank
City	Leave blank
State	Leave blank
Zip	Leave blank
Mobile	Leave blank
Birthdate	Leave blank
OptInSource	Type `Website`
Gender	Type `any gender`

Interest	Type `Training`
myNTO	Select **True**
OptInDate	Enter today's date (MM/DD/YY)

f. Click **Save**.

Exercise 5-2: Test the Abandon Cart Emails

Goal: Explore the Subscriber Preview to test rendering and send your email with the Test Send tool.

Instructions:

1. Navigate to Content Builder
    a. In the App Switcher, hover over **Salesforce Marketing Cloud**.
    b. Hover over Content Builder and click **Content Builder**.
2. Use Subscriber Preview for Abandon Cart Low Value Email.
    a. Click drop down on **Abandon Cart Low Value** and click **Preview and Test**.
    b. Click the **Folder** icon in the left panel.
    c. Click **Data Extensions** and select **NTOAbandonCart**.
    d. Click **the first subscriber record** and click **Select**.
    e. Click **>** by the Folder icon to preview other subscriber emails.
3. Edit Content to include ProperCase function.
    a. Click **Back**.
    b. Click the first **Two Column (Top) Layout** content area in the email.
    c. Click the **Text** content area.
    d. Change %%FirstName%% to `%%=ProperCase(FirstName)=%%`.
    e. Click **Done Editing**.
    f. Click **Next**.
    g. Click **>** by the Folder icon to preview other subscriber emails.
4. Complete a Test Send.
    a. Click the **Test Send** icon in the left panel.
    b. Under Individuals, click the **X** to remove the account email address.
    c. Type `your email` address and press **enter**.
    d. Leave as default: **Based on Preview**.
    e. Leave as default: **From Options**.
    f. Leave as default: **Subject Prefix**.
    g. Leave all default options selected.
    h. Click **Send Test**.
    i. Click **Confirm and Send**.
    j. In the upper left corner, click < **Back**.

5. Use Subscriber Preview for Abandon Cart High Value Email.
    a. Click drop down on **Abandon Cart High Value** and click **Preview and Test**.
    b. Click the **Folder** icon in the left panel.
    c. Click **Data Extensions** and select **NTOAbandonCart**.
    d. Click **the first subscriber record** and click **Select**.
    e. Click **>** by the Folder icon to preview other subscriber emails.
6. Edit Content to include ProperCase function.
    a. Click **Back**.
    b. Click the first **Two Column (Top) Layout** content area in the email.
    c. Click the **Text** content area.
    d. Change %%FirstName%% to `%%=ProperCase(FirstName)=%%`.
    e. Click **Done Editing**.
    f. Click **Next**.
    g. Click **>** by the Folder icon to preview other subscriber emails.
7. Complete a Test Send.
    a. Click the **Test Send** icon in the left panel.
    b. Under Individuals, click the **X** to remove the account email address.
    c. Type `your email` address and press **enter**.
    d. Leave as default: **Based on Preview**.
    e. Leave as default: **From Options**.
    f. Leave as default: **Subject Prefix**.
    g. Leave all default options selected.
    h. Click **Send Test**.
    i. Click **Confirm and Send**.
    j. In the upper left corner, click **Back**.

Exercise 5-3: Test the Welcome Email

Goal: Explore the Subscriber Preview to test rendering and send your email with the Test Send tool.

Instructions:

1. Use Subscriber Preview.
    a. Click drop down on **Welcome Email NEW [Month] [Year]** and click **Preview and Test**.
    Note: An error will display until you change the preview Data Extension.
    b. Click the **Folder** icon in the left panel.
    c. Click **Data Extensions** and select **NTOSubscribers**.
    d. Click **the first subscriber record** and click **Select**.
    e. Click **>** by the Folder icon to preview other subscriber emails.
2. Edit Content to include ProperCase function.
    a. Click **Back**.
    b. Click the first **Two Column (Top) Layout** content area in the email.
    c. Click the **Text** content area.
    d. Change %%FirstName%% to `%%=ProperCase(FirstName)=%%`.
    e. Click **Done Editing**.
    f. Click **Done Editing**.
    g. Click **Next**.
    h. Click **>** by the Folder icon to preview other subscriber emails.
3. Complete a Test Send.
    a. Click the **Test Send** icon in the left panel.
    b. Click the **Test Data Extensions** tab under Recipients.
    c. Click the **Data Extensions** folder and select Data Extensions.
    d. Select **Test**.
    e. Click **Select**.
    f. Leave as default: **Based on Recipient "Test"**.
    g. Leave as default: **From Options**.
    h. Leave as default: **Subject Prefix**.
    i. Leave all default options selected.
    j. Click **Send Test**.
    k. Click **Confirm and Send**.

Exercise 5-4: Send the Newsletter Email

Goal: Send an email using Send Flow.

Instructions:

1. Send Newsletter Email using the Send Flow.
    a. In the App Switcher, hover over **Email Studio** and click **Email**.
    b. In Email Studio, click **Content** in the toolbar.
    c. Click **Shared > NTO Global Assets > Emails**
    d. Click drop-down on **Newsletter** and click **Send**.
    e. In the **From Options**, select the **NTO Commercial**.
    f. Click **Next**.
    g. Click **Data Extensions** and drag the **NTO Subscribers Data Extension** to the Targeted area.
    h. Leave as default: **All Subscribers**.
    i. Click **Select**.
    j. Click **Next**.
    k. Leave as default: **Send Immediately**.
    l. Click **Next**.
    m. Check the box for: **This information is correct and this email is ready to send**.
    n. Click **Send**.

Exercise 5-5: Tour All Subscribers

Goal: Familiarize yourself with All Subscribers and what type of information gets stored there.

Instructions:

1. Explore All Subscribers in Email Studio.
    a. Hover over **Subscribers** in the toolbar and select **All Subscribers**.
    b. Click **All Subscribers** again to go to the List.
    c. Click **Email Address** to sort.
    d. Click the **Properties** tab.
    e. Click the **Tracking** tab.
    f. Click on the **Subscribers** tab.
    g. Click on a **subscriber**.
    h. View the **General Tab**. Note the Subscriber shirt color, which is determined by status. See total bounces and unsubscribe events.
    i. Click the **Attributes Tab**. Note that these are Profile and Preference Attributes. Data Extension Attributes do not appear here, and they are not added to All Subscribers.
    j. Click the **History Tab**. See all the email message activity that has happened in the last 90 days.

Exercise 5-6: Create a Publication List

Goal: Create a publication list for Welcome campaign emails.

Instructions:

1. Hover over **Subscribers** and select **Publication Lists**.
2. Click **Create**.
3. Create the Publication List using the following:

Name	Type `WelcomePublicationList####`
Description	`For NTO's Welcome emails.`
Public	**Deselect**

4. Click **Save**.

Exercise 5-7: Create the Recent Bounces Exclusion List

Goal: Create a data extension for every email address with a bounce event in the last 30 days.

Instructions:

1. Navigate to Contact Builder and create Recent Bounces Data Extension
    a. In App Switcher, hover over **Salesforce Marketing Cloud**.
    b. Hover over **Audience Builder** and select **Contact Builder**.
    c. In the toolbar, click **Data Extensions**.
    d. Click **Create**.
        i. Name: `NTORecentBounces`
        ii. Description: `Stores all subscribers who have had a bounce event in the last thirty days`
        iii. Is Sendable: **Checked**
    e. Click **Next**.
    f. On the Data Retention Policy screen, click **Next**.
    g. Complete the Attributes using the following table:

Primary Key	Name	Data Type	Length	Required	Default
X	CustomerID	Text	50	X	
	EmailAddress	EmailAddress	NA	X	
	EventDate	Date	NA	X	

    h. Define the Send Relationship: **CustomerID** relates to **Subscriber Key**.
    i. Click **Complete**.
    j. Click **OK**.
2. Navigate to Automation Studio and create the Bounces SQL Activity
    a. In App Switcher, hover over **Salesforce Marketing Cloud**.
    b. Hover over **Journey Builder** and select **Automation Studio**.
    c. Click the **Activities** tab in the toolbar.
    d. Click **Create Activity**.
    e. Select **SQL Query**.

f. Click **Next**.
g. Create the Query Activity using the following:
    i. Name: `Recent Bounces SQL Query`
    ii. External Key: `RecentBouncesQuery###`
    iii. Description: `Finds all subscribers who have had a bounce event in the last thirty days.`
    iv. Click **Next**.
    v. In the Query editor, type the following:

```
SELECT      s.SubscriberKey as CustomerId,
            s.EmailAddress, b.EventDate
FROM        ent._Subscribers s
INNER JOIN ent._Bounce b
ON          s.SubscriberKey = b.SubscriberKey
WHERE       b.EventDate >= DATEADD(DAY, -30,GETDATE())
```

    vi. **Click Validate Syntax**.
h. Click **Next**.
    i. Target Data Extension: **NTORecentBounces**
    ii. Data Action: **Overwrite**
i. Click **Next**.
j. Click **Finish**.

3. Run the Recent Bounces SQL Query
    a. In the left panel click **SQL Query**.
    b. Locate **Recent Bounces SQL Query** and click the **drop-down** arrow.
    c. Select **Run Once**.
    d. Click **Run**.
    Note: This data extension will not have any records because we do not have any bounces in our account.

Exercise 6-1: Create the Abandon Cart Import Activity

Goal: Create an Import Activity that will contain all the information needed to import data into the NTOCartInfo Data Extension.

Instructions:

1. Navigate to Automation Studio and Create the Import Activity
    a. Hover over **Salesforce Marketing Cloud**.
    b. Hover over **Journey Builder** in the toolbar and select **Automation Studio**.
    c. Click the **Activities** tab.
    d. Click **Create Activity**.
    e. Select **Data Copy or Import**.
    f. Click **Next**.
    g. Complete the Import Activity using the following:
        i. Name: `Cart Info Daily Import`
        ii. Send Notification email to: **Checked**
        iii. Email Address: Type `your Email Address`
    h. Click **Next**
    i. For data source, select **File Location**.
    Note: Ignore the error message regarding the file naming pattern prior to entering the information.
        i. File Location: **ExactTarget Enhanced FTP**
        ii. File Naming Pattern: **NTOCartInfo[the number in your username].csv.**
        iii. Date Format: **English (United States)**
        iv. Delimiter: **Comma**
        v. Respect double quotes (") as a text delimiter: **Checked**
        vi. Skip rows with bad data: **Checked**
    j. Click **Next**.
        i. Select a Data Extension: **NTOCartInfo**
    k. Click **Next**.
        i. Data Action: **Overwrite**

ii. Map by Header Row: **Selected**

l. Click **Next**.

m. Review your settings and click **Finish**.

2. Test the Import Activity
    a. Click **Click Data Copy or Import** in left panel.
    b. Locate **Cart Info Daily Import**.
    c. Click the **Cart Info Daily Import** drop-down and select **Run Once**.
    d. Click **Run**.
3. Check your Results
    a. Hover over **Salesforce Marketing Cloud**.
    b. Hover over **Audience Builder** and click **Contact Builder**.
    c. Click **Data Extensions** in the Toolbar.
    d. Verify the **NTOCartInfo** data extension has 95 records.

Exercise 6-2: Create the Abandon Cart Data Automation

Goal: Automate NTO's nightly Abandon Cart Import.

Instructions:

1. Create a new Automation
    a. Hover over **Salesforce Marketing Cloud**.
    b. Hover over **Journey Builder** in the toolbar and select **Automation Studio**.
    c. Click the **Overview** tab.
    d. Click **New Automation**.
    e. Click in the **Untitled Automation** box in the upper left corner.
    f. Type `Abandon Cart Data Activities.`
    g. Click **Done**.
2. Create the Starting Source for the Welcome Series Automation
    a. Drag **Schedule** in **Starting Sources** to **Start with a Starting Source** on canvas.
    b. Click **Configure**.
    c. Click in the **Start Date** box.
    d. Select **Tomorrow's Date.**
    e. Click in the **Time** box and click **3:00 AM**.
    f. Leave **Time Zone** as is.
    g. Repeat: **Daily**
    h. End: **After 3 occurrence(s)**
    i. Click **Done**.
    Note: We are scheduling this to run throughout the week of training so that it is an actively scheduled automation when we create journey entry sources.
3. Create the Workflow
    a. From the **Activities** panel, locate the **Data Copy or Import** activity.
    b. Drag the **Import File** activity to the workflow canvas.
    c. Click **Choose**.
    d. Click **Cart Info Daily Import**.
    e. Click **Done**.
    f. Click **Save**.
4. Configure the Activity Settings and Activate the Automation
    a. Click the **Activity** tab.

b. In Notification Settings, type `your email address` for the Runtime Error or Skipped Run and the Run Completion.
c. Navigate back to the **Workflow** tab.
d. Under Schedule, click **Active**.
e. Click **Activate** in the dialog box.

Exercise 6-3: Create Abandon Cart Data Filters and Filter Activities

Goal: Create filtered data extensions and activities to refresh them for the Abandon Cart Campaign.

Instructions:

1. Navigate to Email Studio and Create the Data Filter for Abandon Cart Low Value.
    a. In the App Switcher, hover over **Email Studio** and click **Email.**
    b. Hover over **Subscribers** and select **Data Extensions**.
    c. Click **LowValueCart Data Extension**.
    d. Click **Save As Filter**.
    e. Save the Data Filter using the following:
        i. Name: `Low Cart Value Data Filter`
        ii. Location: **Data Filters** folder
    f. Click **Save**.
    g. Click **Close**.
2. Create the Data Filter for Abandon Cart High Value.
    a. Click Data Extensions in the upper left corner to navigate back to the Data Extension overview page.
    b. Click **HighValueCart Data Extension**.
    c. Click **Save As Filter**.
    d. Save the Data Filter using the following:
        i. Name: `High Cart Value Data Filter`
        ii. Location: **Data Filters** folder
    e. Click **Save**.
    f. Click **Close**.
3. Navigate to Automation Studio and Create the Filter Activity for Abandon Cart Low Value
    a. In App Switcher, hover over **Salesforce Marketing Cloud**.
    b. Hover over **Journey Builder** and select **Automation Studio**.
    c. Click the **Activities** tab in the toolbar.
    d. Click **Create Activity.**
    e. Select **Filter**.
    f. Click **Next**.
    g. Create the Filter Activity using the following:

            i. Name: `Low Cart Value Data Filter Activity`
            ii. Filter Definition: **Low Cart Value Data Filter**
    h. Click **Next**.
            i. Name: `Auto_AbandonCartLowVal`
            ii. *Note: This step creates a data extension using the name provided here. The data extension is created upon saving the filter activity, and it is updated whenever the filter activity is run, manually or through an automation.*
    i. Click **Next**.
    j. Click **Finish**.
4. Create the Filter Activity for Abandon Cart High Value
    a. Click **Create Activity**.
    b. Select **Filter**.
    c. Click **Next**.
    d. Create the Filter Activity using the following:
            i. Name: `High Cart Value Filter Activity`
            ii. Filter Definition: **High Cart Value Data Filter**
    e. Click **Next**.
            i. Name: `Auto_AbandonCartHighVal`
    f. Click **Next**.
    g. Click **Finish**.

Exercise 6-4: Add Segmentation Activities to the Abandon Cart Data Automation

Goal: Automate NTO's Abandon Cart segmentation activities.

Instructions:

1. Edit the Abandon Cart Data Activities Automation
    a. In Automation Studio, click the **Overview** Tab in the toolbar.
    b. From the list view, click **Abandon Cart Data Activities**.
    c. Click the **Workflow** tab on the Automation.
    d. From the Activities in the left panel, drag the **SQL Query Activity** to Step 2 of the canvas.
    e. Click **Pause and Edit**.
    f. Configure the SQL Query Activity using the following:
        i. Click **Choose**.
        ii. Select the **Abandon Cart SQL Query.**
    g. Click **Done**.
    h. From the Activities in the left panel, drag the Filter Activity to Step 3 of the canvas.
    i. Configure the Filter Activity using the following:
        i. Click **Choose.**
        ii. Select the **Low Cart Value Filter Activity**.
    j. Click **Done**.
    k. From the Activities in the left panel, drag the Filter Activity to Step 3 of the canvas.
    l. Configure the Filter Activity using the following:
        i. Click **Choose**.
        ii. Select the **High Cart Value Filter Activity**.
    m. Click **Done**.
    n. Click **Save**.
    o. Click **Active**.
    p. Click **Activate**.

Exercise 6-5: Create and Schedule the Single Send Journey

Goal: Create and send the Weekend Sale Promo email in Journey Builder.

Instructions:

1. Navigate to Journey Builder.
    a. Hover over the Salesforce Blue Cloud.
    b. Hover over **Journey Builder**.
    c. Click **Journey Builder**.
2. Create a new Single Send Journey
    a. Click **Create New Journey** in the upper right corner.
    b. Click the Email radio button under the **Single Send Journey** build option.
    c. Click to choose **Single Send Journey**.
    d. Click the **Create** button.
    e. In the upper left corner, delete the pre-populated Journey name field and type `Flash Sale Promo`.
    f. Press **Enter**.
    g. Click **Save** in the upper right corner.
3. Configure the Target Data Extension.
    a. In the Journey Canvas, click the **Data Extension** icon.
    b. Click **Select Data Extension**.
    c. Select the **NTOSubscribers** Data Extension.
    d. Click **Filter Contacts**.
    e. In the Attributes panel, click **Contact Data**.
    f. Click **Subscribers > NTOSubscribers**.
    g. Drag the **myNTO** attribute to the Filter canvas.
    h. Click the **Edit** icon.
    i. Leave **is**.
    j. Change value to **true**.
    k. Click **Done**.
    l. Click **Summary**.
    m. Click **Done**.
    n. Click **Save** in the upper right corner.
4. Create the Flash Sale Promotional Email.
    a. In the Journey Canvas, click the **Email** icon.

   b. Click **New Message**.
   c. Open dropdown and select Template (if it is not already selected).
   d. Click **Saved.**
   e. Select the **NTO Template NEW [Month] [Year].**
   f. Click Select.
   g. In Define Email Properties, complete the fields:
      i. Name: `Flash Sale Promo Email`
      ii. Description: Leave blank
      iii. Location: Leave default
      iv. Campaign: Do not associate
      v. Target Language: Keep as default: Unicode-UTF-8
      vi. Click **Next**.

5. Create Email Content
   a. Define the Subject Line using the following:
      i. Click in the Subject line box.
      ii. In the Subject Line, type `Member Exclusive: hurry, this sale won't last long`
      iii. Click **Done**.
   b. Define the Preheader using the following:
      i. In the Preheader, type `24 Hours. 40% Off. Free Shipping`
      ii. Click **Done**.
   c. Define the Hero Content Area.
      i. Click the main content area.
      ii. Click the Content tab and search for Flash **in All Content**.
      iii. Drag the **Flash-Sale-Hero.png** to the Hero Image Content area.
      iv. Click **Done Editing**.
   d. Define the Text Below the Hero Image
      i. Click the Text block below the Hero Image.
      ii. Delete the text.
      iii. Type: `Use Code FLASH40 at Checkout`
      iv. Highlight the Body of the Text content area.
      v. Click **Align Center**.
      vi. Click **Done Editing**.
   e. Define Button Content Area.
      i. Click the Button content area.
      ii. In the Button Text, type: `SHOP THE SALE`

        iii. In the Link URL, type `northerntrailoutfitters.com.`
        iv. In the Title text box, type `Go here to shop the Flash sale.`
        v. In the Tracking Alias, type `Flash Sale Button.`
        vi. Click **Block Settings**.
        vii. Locate the Padding and change it to 30px on all sides.
        viii. Click **Done Editing**.
        ix. Click **Save** in the upper right corner.

6. Preview the email using Subscriber Preview.
    a. Click **Next**.
    b. Click the **Folder** icon in the left panel.
    c. Select the **Data Extensions** folder and choose the **NTOSubscribers** data extension.
    d. Click the first subscriber record and click **Select**.
    e. Click the **arrow** to scroll through previews.
7. Test the email using Test Send.
    a. Click the **Test Send** icon in the left panel.
    b. Delete the pre-populated email address.
    c. In the Recipients text box, type `your email address.`
    d. Press **Enter**.
    e. Click **Send Test**.
    f. Click **Confirm and Send**.
8. Save the Email
    a. In the upper right corner, click **Save and Exit**.
    b. Click **Done**.
9. Execute the Single Send Journey.
    a. In the Journey Canvas, click the **Schedule** icon.
    b. Click **At specific date and time** from the Schedule options.
        i. Run Date: **Choose this Friday**
        ii. Time: **8:00am**
    c. Click **Done**.
    d. Click **Validate** to test your journey for errors.
    e. Click **Activate**.
    f. Click **Schedule**.
    g. Click **Return to Journey**.

Exercise 6-6: Create and Automate the Welcome Step 1 Filter Activity

Goal: Create and automate the data extension for the Welcome Journey.

Instructions:

1. Navigate to Email Studio within the Marketing Cloud.
    a. In the App Switcher, hover over the **Salesforce Marketing Cloud**.
    b. Hover over **Email Studio** and click **Email**.
2. Create Data Filter.
    a. Hover over **Subscribers** and click **Data Filters**.
    b. Click **Create**.
    c. Select **Data Extension**.
    d. Click **OK**.
    e. Select **NTOSubscribers**.
    f. Click **OK**.
    g. Drag **OptInDate** to the canvas.
    h. Leave operator as **Is Equal To**
    i. Change Date to **Today – 1 Day**
    j. Select **Account Time Zone.**
    k. Click **Save**.
    l. Name: Type `Welcome Journey Data Filter`
    m. Click **Data Filter** folder.
    n. Click **Save**.
3. Navigate to Automation Studio within the Marketing Cloud.
    a. In the App Switcher, hover over the **Salesforce Marketing Cloud**.
    b. Hover over **Journey Builder** and click **Automation Studio**.
4. Create Filter Activity.
    a. Click **Activities**.
    b. Click **Create Activity**.
    c. Click **Filter** and click **Next**.
    d. Name: Type `Welcome Journey Filter Activity`
    e. In Filter Definition, select **Welcome Journey Data Filter** and click **Next**.
    f. Name: Type `Auto_WelcomeJourneyDE.`
    g. Click **Next**.
    h. Click **Finish**.

5. Create New Automation.
    a. In Automation Studio, click the **Overview Tab**.
    b. Click **New Automation**.
    c. Click in the **Untitled Automation** box in the upper left corner.
    d. Type `NTO Welcome Series Journey Entry.`
    e. Click **Done**.
6. Create the Starting Source for the Welcome Series Automation.
    a. Drag **Schedule** in **Starting Sources** to **Start with a Starting Source** on canvas.
    b. Click **Configure**.
    c. Start Date: Select **tomorrow's date**.
    d. Start Time: Select **9:00am**.
    e. Time Zone: Leave as Default.
    f. Leave **Repeat** as default.
    Note: We are scheduling this to run once for training, but this automation would run daily with no end date based on the scenario.
    g. Click **Done**.
7. Create the Workflow for the Welcome Series Automation.
    a. From the Activities in the left panel, drag the Filter Activity to Step 1 of the canvas.
    b. Configure the Filter Activity using the following:
        i. Click **Choose**.
        ii. Select the **Welcome Journey Filter Activity**.
        iii. Click **Done**.
    c. Click **Save**.
8. Configure the Activity Settings and Save the Automation
    a. Click the **Activity** tab to the right of Workflow.
    b. In Notification Settings, type `your email address` for the Runtime Error or Skipped Run and the Run Completion.
    c. Click **Save**.

Exercise 6-7: Create the Welcome Series Journey & Configure the Entry Source

Goal: Create a new journey and define the entry source.

Instructions:

1. Navigate to Journey Builder and use a Template to Create the NTO Welcome Series Journey
    a. In App Switcher, hover over **Salesforce Marketing Cloud**.
    b. Hover over **Journey Builder** and select **Journey Builder**.
    c. Click **Templates**.
    d. Click **Welcome Journey (Simple)**.
    e. Click **Get Started**.
    f. In the **Name** field, delete pre-populated name and type `NTO Welcome Series ####.`
2. Define the Entry Source.
    a. Click the **Data Extension Entry Source**.
    b. Click **Select Data Extension** and Select **Auto_WelcomeJourneyDE**.
    c. Click **Summary**.
    d. Click **Done**.
    e. Click on **Schedule**.
    f. Select **Automation**.
    g. Click **Select**.
    h. Click on **Set Schedule**
    i. Select **NTO Welcome Series Journey Entry**.
    j. Click **Summary**.
    k. Click on **Edit Button** for Contact Evaluation
    l. Select **Evaluate all records**.
    m. Click **Summary**.
    n. Click **Done**.
    o. Click **Save**.

Exercise 6-8: Configure Journey Settings and Goal

Goal: Configure the journey settings and create a goal using contact data.

Instructions:

1. Define the Journey Settings
    a. Click the **Settings** icon (Gear) in the toolbar.
    b. Select **Journey Settings**
    c. In Contact Entry, select **No re-entry**.
    d. In Default Email Address, verify **Use email attribute from Entry Source** is selected.
    e. Click **Done**.
    f. Click **Save**.
2. Set a Goal
    a. Click the **Goal** icon (Trophy).
    b. Click **Filter**.
    c. In the Attributes panel, click **Contact Data**.
    d. Click **Subscribers| NTOSubscribers**
    e. Drag **myNTO** to the value box.
    f. Click the **pencil** to edit.
    g. Change the value to **True**.
    h. Click **Done**.
    i. Click **Definition**.
    j. Definition dialog box:
        i. Click in the box next to **I want** and type `50.`
        ii. Click the **total people** drop-down and select **% of population**.
        iii. In the Customize box, type `Join myNTO Rewards.`
        iv. Exit Option: **Unchecked**
        v. Click **Summary**.
        vi. Click **Done**.
    k. Click **Save** in the upper right corner.

Exercise 6-9: Configure Messaging & Flow Control Activities

Goal: Configure the Welcome Series messages and wait activities.

Instructions:

1. Define the Send Email Activity for Welcome 1.
    a. Click the **Email** icon for Welcome 1 on the canvas.
    b. Click **Select Message**.
    c. In the Select Message step of the Send Email dialog box, select **Welcome Email NEW [Month] [Year]**.
    d. Click the **Summary** tab.
    e. Click **Edit** next to Delivery Options
    f. Click **Select** for Publication List.
    g. Click **Publication Lists** folder.
    h. Click **WelcomePublicationList###**.
    i. Click **Select**.
    j. Click **Summary**.
    k. Click **Done**.
2. Define the Wait by Duration Activity after Welcome Email 1
    a. Click the **Wait by Duration Activity** to the right of Welcome Email NEW [Month] [Year].
    b. Change the duration to **3 Days**.
    c. Click **Done**.
3. Define the Send Email Activity for Welcome 2.
    a. Click the **Email** icon for Welcome 2 on the canvas.
    b. Click **Select Message**.
    c. In the Select Message step of the Send Email dialog box, click **Shared** and select **Welcome Email 2 Profile Information**.
    d. Click the **Summary** tab.
    e. Click **Edit** next to Delivery Options
    f. Click **Select** for Publication List.
    g. Click the **Publication List** folder.
    h. Click **WelcomePublicationList####**.
    i. Click **Select**.

   j. Click **Summary**.
   k. Click **Done**.
4. Define the Wait by Duration Activity after Welcome Email 2
   a. Click the **Wait by Duration Activity** to the right of Welcome Email 2 Profile Information.
   b. Change the duration to **5 Days**.
   c. Click **Done**.
5. Define the Send Email Activity for Welcome 3.
   a. Click the **Email** icon for Welcome 3 on the canvas.
   b. Click **Select Message**.
   c. In the Select Message step of the Send Email dialog box, click **Shared** and select **Welcome Email 3 Join MyNTO Today**.
   d. Click the **Summary** tab.
   e. Click **Edit** next to Delivery Options
   f. Click **Select** for Publication List.
   g. Click the **Publication Lists** folder.
   h. Click **WelcomePublicationList###**.
   i. Click **Select**.
   j. Click **Summary**.
   k. Click **Done**.
   l. Click **Save** in the upper right corner.

Exercise 6-10: Validate, Activate, & Run the Welcome Journey

Goal: Validate and Activate the journey.

Instructions:

1. Validate and Activate the Journey
   a. Click **Activate**.
   b. Review the recommendations.
   c. Click **Activate**.
   d. Click **Activate**.
   e. Click **Return to Journey**
2. Navigate to Automation Studio within the Marketing Cloud.
   a. In the App Switcher, hover over the **Salesforce Marketing Cloud**.
   b. Hover over **Journey Builder** and click **Automation Studio**
3. Run the Welcome Series Journey Entry Automation
   a. Click the **NTO Welcome Series Journey Entry Automation**.
   b. In the right corner, click the blue **Run Once** button.
   c. In the left corner, click **Select All Activities**.
   d. In the right corner, click **Run**.
   e. Verify the settings, and click **Run Now**.

Exercise 6-11: Create Abandon Cart Campaign & Test with Path Optimizer

Goal: Create the Abandon Cart Campaign Journey and use a Path Optimizer Activity.

Instructions:

1. Navigate to Journey Builder
    a. In App Switcher, hover over **Salesforce Marketing Cloud**.
    b. Hover over **Journey Builder** and select **Journey Builder**.
2. Create the Abandon Cart Journey
    a. Click **Create New Journey**
    b. Click on **Multi-Step Journey** to select it, then click on the **Create** button.
    c. In the **Name** field, delete pre-populated name and type `NTO Abandon Cart`.
3. Define the Entry Source.
    a. From the Entry Sources in the left panel, drag the **Data Extension Entry Source** to the Canvas.
    b. Click the **Data Extension Entry Source**.
    c. Click **Select Data Extension** and Select **NTOAbandonCart**.
    d. Click **Summary**.
    e. Click **Done**.
    f. Click on **Schedule**.
    g. Select **Automation**.
    h. Click **Select**.
    i. Click on **Set Schedule**
    j. Select **Abandon Cart Data Activities**.
    k. Click **Summary**.
    l. Click on **Edit Button** for Contact Evaluation
    m. Select **Evaluate all records**.
    n. Click **Summary**.
    o. Click **Done**.
4. Define the Journey Settings.
    a. Click the **Settings** icon in the tool bar.
    b. Select **Journey Settings**
    c. In Contact Entry, select **Re-entry only after exiting**.

   d. In Default Email Address, verify **Use email attribute from Entry Source** is selected.
   e. Click **Done**.
   f. Click **Save** in the upper right corner.
5. Set a Goal.
   a. Click the **Goal** icon (Trophy).
   b. Click **Filter**.
   c. In the Attributes panel, click **Contact Data**.
   d. Click **Purchases| Purchases**.
   e. Drag the **PurchaseDate** attribute to the Filter canvas.
   f. Click the **Edit** icon.
   g. Click the **equal** and select **is on or after**.
   h. Check **Add an attribute to compare**.
   i. In the attribute panel, click the **Home** icon.
   j. Click **Journey Data**.
   k. Click **Entry: NTOAbandonCart**
   l. Drag **AbandonDate** to value box.
   m. Click **Done**.
   n. Click **Definition**.
   o. **Definition** dialog box:
      i. Click in the box next to **I want** and type `50`.
      ii. Click the **total people** drop-down and select **% of population**.
      iii. In the Customize box, type `make a purchase`.
      iv. Exit Option: **Unchecked**
      Note: Since this goal compares contact data with journey data, the exit option would be configured separately by selecting the **Exit Criteria** icon on the journey settings menu.
      v. Click **Summary.**
      vi. Click **Done**.
   p. Click **Save** in the upper right corner.
6. Configure Decision Split for Low and High Values
   a. From the left panel under Flow Control, drag the **Decision Split** to the right of the Entry Source on the journey canvas.
   b. Click the **Decision Split**.
   c. Click **Path 1** to edit the name.
   d. Type `Low Cart Path` and click **Enter**.

   e. Click **Edit** on the Low Cart Path.
   f. Click **Journey Data**.
   g. Click **Entry: NTO Abandon Cart**.
   h. From the Attributes, drag **CartTotal** to the Filter canvas.
   i. Click **equal** operator and change to **less than**.
   j. Type `300.00` in the value box.
   k. Click **Done**.
   l. Click **Summary**.
   m. Click **Remainder** to edit the name.
   n. Type `High Cart Path` and click **Enter**.
   o. Click **Done**.
   p. Click **Save** in the upper right corner.
7. Configure the Low Value Path
   a. Drag the **Wait by Duration activity** from the left panel and drop it into the top path.
   b. Change the duration to **1 Hour**.
   c. Check the box to **Extend wait duration until specific time**.
   d. Time: **9:00am**
   e. Time Zone: Leave as default.
   f. Click **Done**.
   g. From the left panel under Messages, drag the **Email Activity** to the top path after the Wait by Duration.
   h. Click the **Email** icon on the canvas.
   i. Click **Select Message**.
   j. In the Select Message step of the Send Email dialog box, click the **Abandon Cart Low Value** email message.
   k. Click the **Summary** tab.
   l. Click **Done**.
   m. Click **Save** in the upper right corner.
8. Configure the High Value Path
   a. Select the **Wait by Duration (Clock)** in the High Cart Path.
   b. Change the duration to **1 Hour**.
   c. Check the box to **Extend wait duration until specific time**.
   d. Time: **9:00am**
   e. Time Zone: Leave as default.
   f. Click **Done**.

   g. From the left panel under Messages, drag the **Email Activity** to the bottom path after the Wait by Duration.
   h. Click the **Email** icon on the canvas.
   i. Click **Select Message**.
   j. In the Select Message step of the Send Email dialog box, click the **Abandon Cart High Value** email message.
   k. Click the **Summary** tab.
   l. Click **Done**.
   m. Click **Save** in the upper right corner.
9. Configure the Engagement Split for Low Value Carts
   a. Drag a **Wait by Duration** activity from the left panel and drop it after the **Abandon Cart Low Value** Email. Duration should be set to 1 Day.
   b. From the left panel under Flow Control, drag the Engagement Split Activity to the Low Value Cart path **after** the **Wait by Duration (clock)**.
   c. Click the **Engagement Split**.
   d. Click **Select Message and** verify the Abandon Cart Low Value email is selected.
   e. Click **Message Metrics**.
   f. Click **Opens**.
   g. Click **Summary**.
   h. Click **Done**
10. Configure the Engagement Split for High Value Carts
   a. Drag a **Wait by Duration** activity from the left panel and drop it after the **Abandon Cart High Value** Email. Duration should be set to 1 Day.
   b. From the left panel under Flow Control, drag the Engagement Split Activity to the High Value Cart path **after** the **Wait by Duration (clock)**.
   c. Click the **Engagement Split**.
   d. Click **Select Message** and verify the Abandon Cart High Value email is selected.
   e. Click **Message Metrics**.
   f. Click **Opens**.
   g. Click **Summary**.
   h. Click **Done**
11. Configure the Path Optimizer Activity
   a. From the left panel under Flow Control, drag the **Path Optimizer Activity** to the Low Cart Path for Opens.

   b. Click the Path Optimizer Activity.
      i. Activity Name: `No Opens Subject Line Test`
      ii. Activity Description: `Testing different subject lines for NTO's Abandon Cart Campaign.`
   c. Click **Configure Winner Evaluation**.
   d. Click **Email Engagement**.
   e. Click **Open Rate**.
   f. Leave the test duration at **1 Day**.
   g. Click **Split**.
   h. Verify the Split is set to **50** for each path.
   i. Click **Summary**.
   j. Click **Done**.
   k. Click **Save** in the upper right corner.

12. Configure the Join for No Opens
   a. From the left panel under Flow Control, drag the **Join Activity** to the High Value Cart Path for no Opens.
   b. Drag the **Drag to Join** icon to the Low Value Cart Path for no Opens.
   c. Click **Save** in the upper right corner.

13. Configure the Control Path
   a. From the left panel under Messages, drag the **Email Activity** to the top path to the right of the Path Optimizer Activity.
   b. Click the **Email Activity**.
   c. Click **Select Message**.
   d. In the Select Message step of the Send Email dialog box, click **Shared > NTO Global Assets > Emails** and select the **NTO Abandon Cart No Opens** email message.
   e. Click edit next to **Message Configuration**.
   f. Subject: `You Left Something Behind: 10% Discount Today Only!`
   g. Click **Done**.
   h. Click **Summary**.
   i. Click **Done**.
   j. Click into the dialog box below the email activity to edit.
   k. Type: `Subject Line A` and click **Enter**.
   l. Click **Save** in the upper right corner.

14. Configure the Test Path

   a. From the left panel under Messages, drag the Email Activity to the bottom path to the right of the Path Optimizer Activity.
   b. Click the **Email Activity**.
   c. Click **Select Message**.
   d. In the Select Message step of the Send Email dialog box, click **Shared > NTO Global Assets > Emails** and select the **NTO Abandon Cart No Opens** email message.
   e. Click edit next to **Message Configuration**.
   f. Subject: `Don't Miss Out: Save 10% Today!`
   g. Click **Done**.
   h. Click **Summary**.
   i. Click **Done**.
   j. Click into the dialog box below the email activity to edit.
   k. Type: `Subject Line B` and click **Enter**.
   l. Click **Save** in the upper right corner.

15. Add a Wait Activity to the End of Each Path
    a. Drag the **Wait by Duration** (1 Day) to the Low Cart Path, just before the Exit.
    b. Drag the **Wait by Duration** (1 Day) to the High Cart Path, just before the Exit.
    c. Drag the **Wait by Duration** (1 Day) to the Path Optimizer Path, just before the Exit.
16. Validate and Test the Journey
    a. In the upper right corner, click **Validate**.
    b. Once the Journey has successfully validated, click **Test Journey** from the validation screen.
    c. Click **Choose Contacts**.
    d. Choose the first 3 contacts in the data extension.
    e. Click the **Send Type** tab in the left panel.
    f. Verify **Do Not Send Messages** is selected.
    g. Click **Summary**.
    h. Click **Start Test**.
    i. Click **Return to Draft**.
17. Activate the Journey
    a. Click **Save**.
    b. Click **Activate**.
    c. Click **Activate**.
    d. Click **Return to Journey**.

Exercise 7-1: Review Tracking Results

Goal: Explore the Tracking Workspace.

Instructions:

1. Navigate to Email Studio and Review Tracking Results.
    a. In the App Switcher, hover over Email Studio and click **Email**.
    b. Hover over Tracking and select **Sends**.
    c. Click **Newsletter**.
    d. Note the Export Button and ability to manually export tracking results.
    e. Explore the sections for various engagement activity.
    f. Click the **Click Activity** tab.
    g. Note the email overlay with percentages next to links.
    h. Click **Link View**.
    i. Note the individual links listed.
    j. Click **Job Links**.
    k. Note the ability to change the URL post-send.

Exercise 7-2: Tour Reports

Goal: Learn how to use the Reports tool.

Instructions:

1. Navigate to Reports.
    a. In the App Switcher, hover over **Analytics Builder** and select **Reports**.
    b. Click **Email** in the Report Catalog.
    c. Click **Create** for the Single Email Performance by Device report.
2. Create the Single Email Performance by Device report using the following:
    a. Date Range: **Last 7 Days**
    b. Email: **Email ID > Shared Content > NTO Global Assets > Emails > Newsletter**
    c. Exclude Single Sends From Report: **True**
    d. Exclude Test Email Sends: **True**
    e. Time Zone: Leave at Account default
    f. Culture Code: Leave at default
3. Click **Submit**.
4. Click the **Email** icon in the upper right corner.
5. Create Email Report Results using the following:
    a. Filename: `Weekly Single Email Performance by Device`
    b. Email Address: `your email address`
    c. Subject: `Weekly Single Email Performance by Device`
    d. Note to include in Email: Leave empty
    e. Format: **Excel Spreadsheet (.xls) or Excel spreadsheet (.xlsx)**
6. Click **Save**.
7. Click **Save** in the upper right corner.
8. Save the Single Email Performance by Device report using the following:
    a. Report Name: `Weekly Single Email Performance by Device`
    b. Description: Leave blank
9. Click **Save**.
10. Click the **Schedule** icon in the upper right corner.
11. Create a schedule using the following:
    a. Start: Select the first Monday from today at **8:00 a.m**.
    b. Time Zone: Leave as default

    c. Repeat: Select **Weekly**
    d. End: **After 1 occurrences**
    e. Format: **Excel Spreadsheet (.xls) or Excel spreadsheet (.xlsx)**
    f. Location: **Save to reports**

12. Click **Save**.

Exercise 7-3: Create and Deliver a Standard Report

Goal: Explore Analytics Builder to learn about standard reports and how to deliver them.

Instructions:

1. Create the Contacts Counts Report
    a. Launch the Trailhead Simulator (if the link does not work, go to **http://bit.ly/StandardReports** in a separate browser tab)
    b. Click **Begin**.
    c. On the Marketing Cloud App Switcher, click **Analytics Builder**, then select **Reports**.
    d. In the Report Catalog area, under Report Categories, click **Contacts**.
    e. In the Actions column, next to Contacts Counts, click **Create**.
    f. Under Report Parameters, click the **Date Range** drop-down, then select **Custom**.
    g. Click the **From Calendar** icon, then select **January 31**.
    h. Click the **To Calendar** icon, then select **February 14**.
    i. Click **Submit**, then click **Save**.
    j. In the Report Name field, type `Contact Count.`
    k. Press **Enter** or **Return**.
    l. In the Description field, type `Last 14 Days.`
    m. Press **Enter** or **Return**.
    n. Click **Save**. The report is saved to your reports overview.
2. Deliver the Report
    a. At the top right side of the Results: Contact Count page, click the **Email Results** icon.
    b. In the Filename field, type `Contact Count Past 14 Days`. Press **Enter** or **Return**.
    c. In the Email Address field, type `asmith@nto.com.`
    d. Press **Enter** or **Return**.
    e. In the Subject field, type `Contact Count Past 14 Days.`
    f. Press **Enter** or **Return**.
    g. Leave **Note to include in Email** and **Format** as is.
    h. Click **Save**.

Exercise 7-4: Analyze the Account Send Summary

Goal: Analyze the Account Send Summary report and make recommendations.

Instructions:

1. Analyze the report numbers.
2. Pay close attention to the key metrics discussed in class.
3. Record 1-2 observations about what you would keep doing, what you would change, or what you would stop doing.
4. Be prepared to share.

Job ID	Email Name	Sends	Implicit Delivery Rate	Overall Bounces	Hard Bounces	Job ID	Soft Bounces	Block Bounces	Technical Bounces
86514	Welcome Step 2	136,199	136,181	18	11	86514	3	3	0
86509	Welcome Step 1	125,572	125,545	27	21	86509	2	1	3
86505	Re-engagement	158	124	34	0	86505	0	0	34
86494	Flash Sale	3,997	2,137	1,860	0	86494	0	0	1860
86472	Welcome Email	4,748	4,748	0	0	86472	0	0	0
Job ID	**Unknown Bounces**	**Unique Opens**	**Cumulative Opens**	**Open Rate**	**Unique Clicks**	**Click Rate**	**Unique Complaints**	**Unique Unsubscribes**	
86514	1	11,170	11,211	8.202%	1,164	.855	0	0	
86509	0	11,215	11,251	8.933%	1,258	1.00	0	1	
86505	0	26	26	20.98%	15	12.1	4	10	
86494	0	1006	1212	40.71%	63	2.95	0	0	
86472	0	115	115	2.422%	19	.4	1	1	

Exercise 8-1: Capstone

Goal: Create a new Birthday Campaign journey for NTO.

Instructions:

1. Create the Birthday Campaign journey based on these requirements.
    a. Coupon data will be used in the journey (Coupon.csv is in your student assets).
    b. Contacts will enter the journey 7 days prior to their birthday and will immediately receive an email inviting them to update their NTO wishlist.
    c. Subscribers will receive an email on their birthday with a coupon.
    d. If the birthday coupon is not redeemed within 7 days of their birthday, a reminder email will be sent.
    e. NTO would like to see 40% coupon redemption.

2. Hints
    a. Create a new Data Extension for coupon data. Import the data. Create an Attribute Group to link it to the Contact.
    b. Create emails for the campaign.
    c. Create a data filter and filter activity for the entry source to Journey Builder finding any subscribers with a birthday anniversary of today + 7 days.
    d. Automate the filter to run daily.
    e. Create a new journey with contact re-entry only after exiting.
    f. Send the first email immediately, wait 7 days and send the second email.
    g. Create a Decision Split using coupon data to determine if the subscriber has redeemed the coupon.
    h. Send the final email to anyone who has not redeemed the coupon.
    i. Set a goal of 40% coupon redemption with the exit option selected.