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ECOMM

Better emails. Better events. Better data.
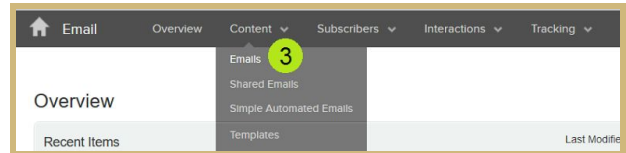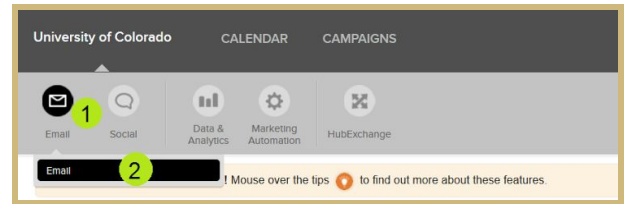
ACF Solutions

Marketing Cloud Email
Quick References Guide

Navigating Marketing Cloud

Follow these steps navigate to the Email Creation/ Email Send section of Marketing Cloud.

1. Click the Email Icon in the top left of the screen.
2. Then 'Email' to navigate to the Email App
3. Once in the Email App, Select 'Email' from the Content Tab.

Content Folders

The Emails, Templates and Images in Marketing Cloud are organized in Folders under the Content Tab. There are two section of folders the 'My' folders and the 'Shared'.

The 'My' folders are NOT your private folders. They are shared with all uses in your Business Unit.

The 'Shared' folders are shared across business units for all of CU. Based on the folder permissions, you may have access to view and use content in the Shared folders, but not to edit the content.

Creating a New Folder

Within your Business Unit you should agree on a folder structure so that content is organized and easily accessible when needed. For training/testing each user will create a folder for their emails.
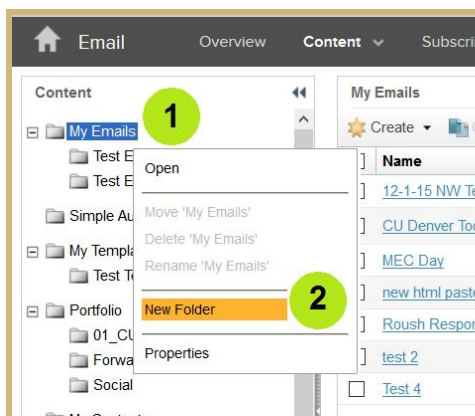
1. Right click the 'My Emails' folder.
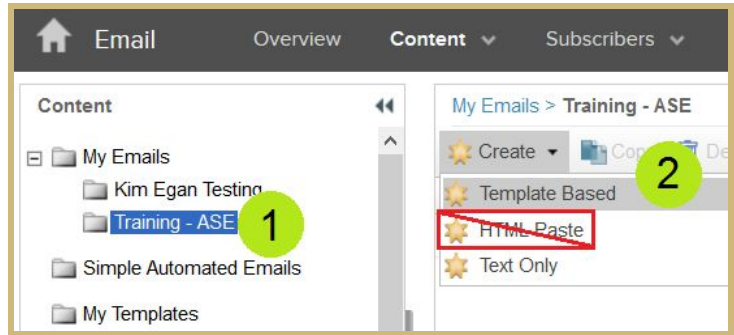2. Then click 'New Folder'.
3. Rename the Folder
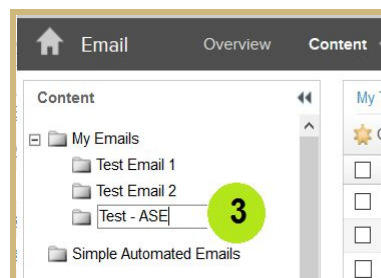
In the future the folder can be Renamed, Moved or Deleted, by right clicking on the folder name.

Email Creation

Create New Email From Shared Template

1. Under 'My Emails' click on the sub-folder you would like to create the email in.

2. Click 'Create' then 'Template Based' to create a new email.

🚫 The unsubscribe footer does NOT work with the 'HTML Paste' option. Do not select this option unless you are creating a transactional email. An HTML paste template has been created for when you want to use HTML paste.

3. Click the 'Select' button to choose the template that will be used for the email.
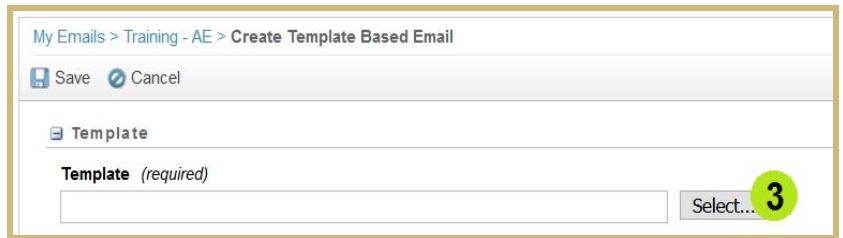
4. Select one of the 'Shared Templates' to use.
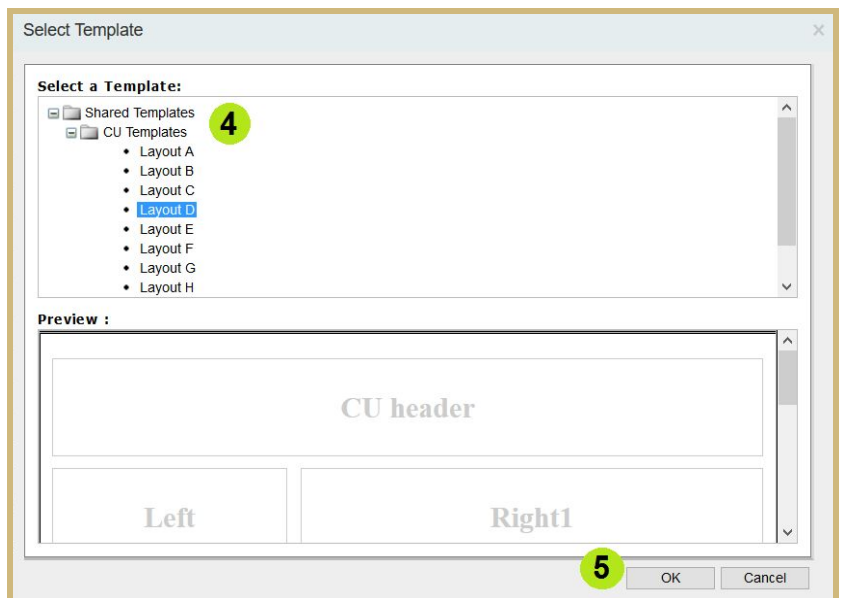
5. Once the correct template has been selected click 'Next' to continue.

6. Enter a Name/Title for the email. Note that name will not be viewable by the receiver of the email.

7. Enter a Subject Line for the email and if needed a Preheader.

➡ A preheader is the short summary text that follows the subject line when in some email clients and on mobile. If the text is over the email clients limit no text will be displayed. For preheader best practices see the following MC blog post:

http://www.exacttarget.com/blog/10-tips-for-successful-email-preheader-text/

8. Once Name and Subject have been entered click the 'Save' button at the top of the screen to continue.

Add Email Header

9. Click into the header section to add the header.

10. Click Create Content and then Content.

11. Select Image Only

12. Click Next

13. Select 'Folder' as the source of the image.

14. Select 'Shared Portfolio' folder and then 'CU Brander headers' folder and then your campus folder from.

➡ Portfolio folders hold email assets such as images.

15. Select the Image you would like to use.

➡ There are black and white version of each header. If you do not see a header email contact@cu.edu to request one.
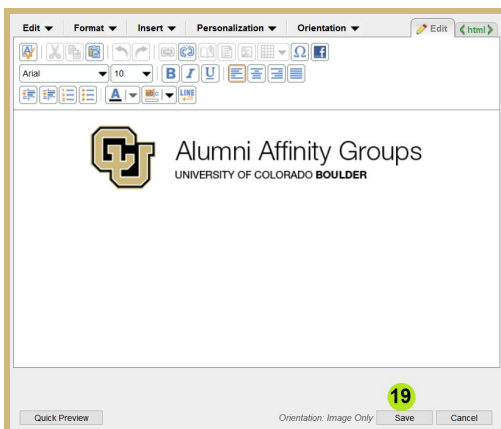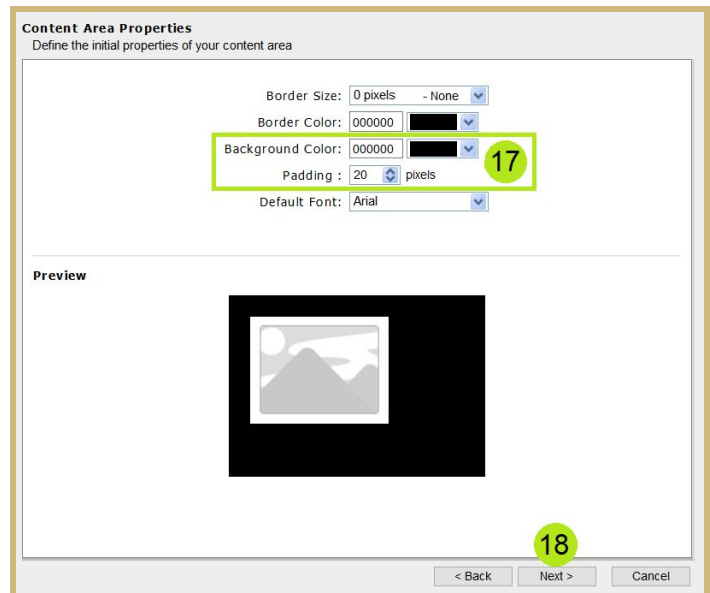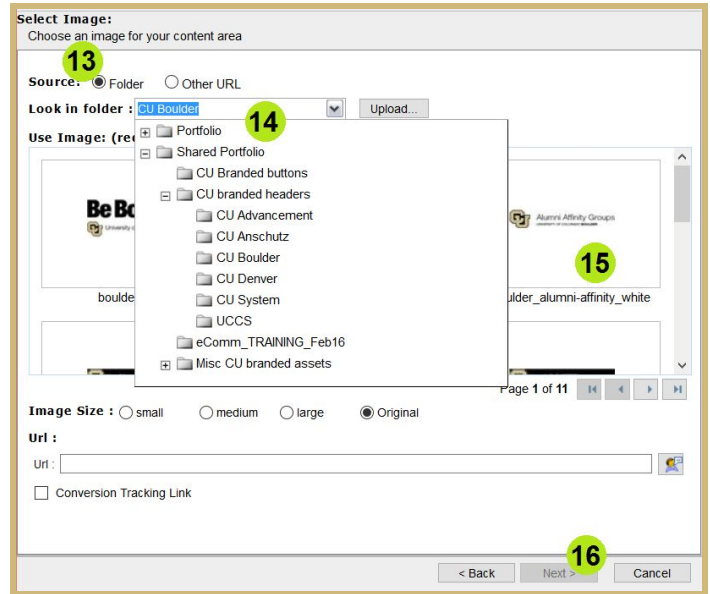
16. Click 'Next' to continue.

17. Set Content Properties, background and border color and padding.

➡ Padding on headers should always be updated to **20 pixels**.

➡ If you select a black header be sure to set the **background color** to **black**.

18. Click 'Next' to continue.

19. Preview the Image, then click 'Save' to finish adding the image to the header.

Add Email Footer

20. Click on the bar at the bottom of the screen.
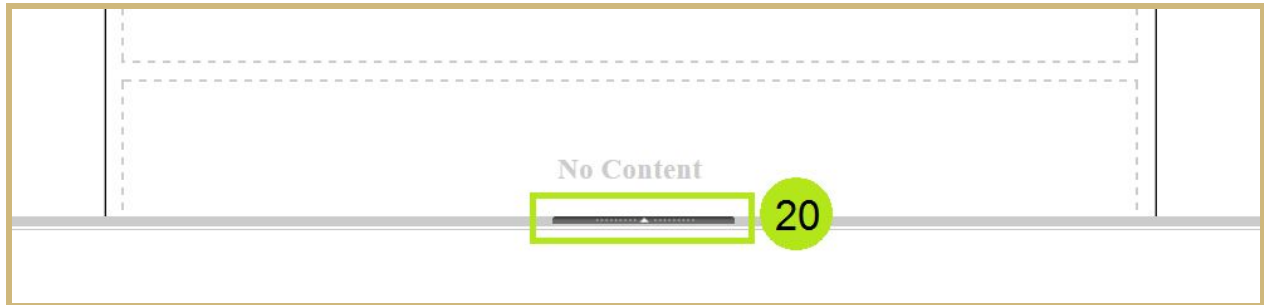
21. From the folder list select 'Shared Content' and then ' FOOTERS'.
22. Click the right and left arrows to scroll through the footers in the folder.
23. Select the footer you would like to use.
24. Drag the footer into the footer content area.
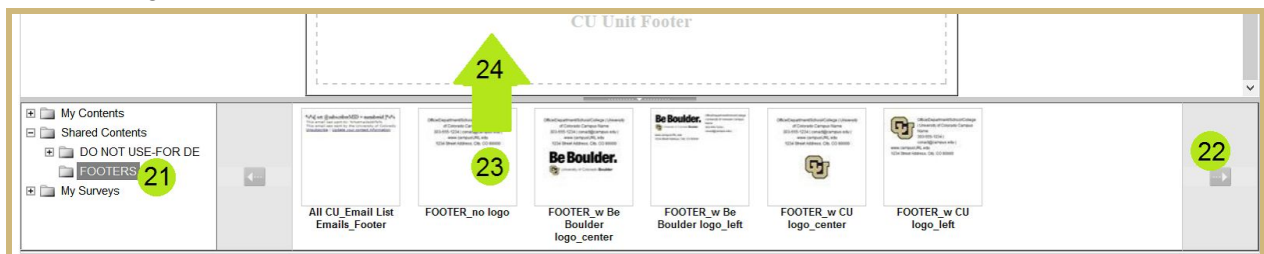
25. Click the bar hide the content bar.

26. Click into the footer section to update the footer with the correct information, and then 'Modify Content'
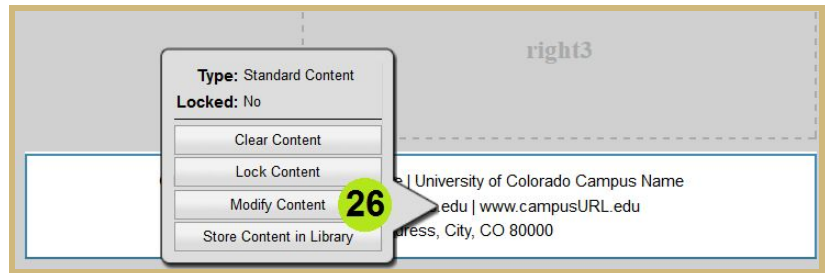
27. Update the Address and other information

28. Click 'Save' button to continue.

Add Personalization Text

29. Click into one of the content areas, click 'Create Content' and then Content.

30. Click 'Text Only'

31. Click 'Next' to continue.

32. Update 'Content Area Properties'.

33. Click 'Next' to continue.

34. You can add text and first name personalization.
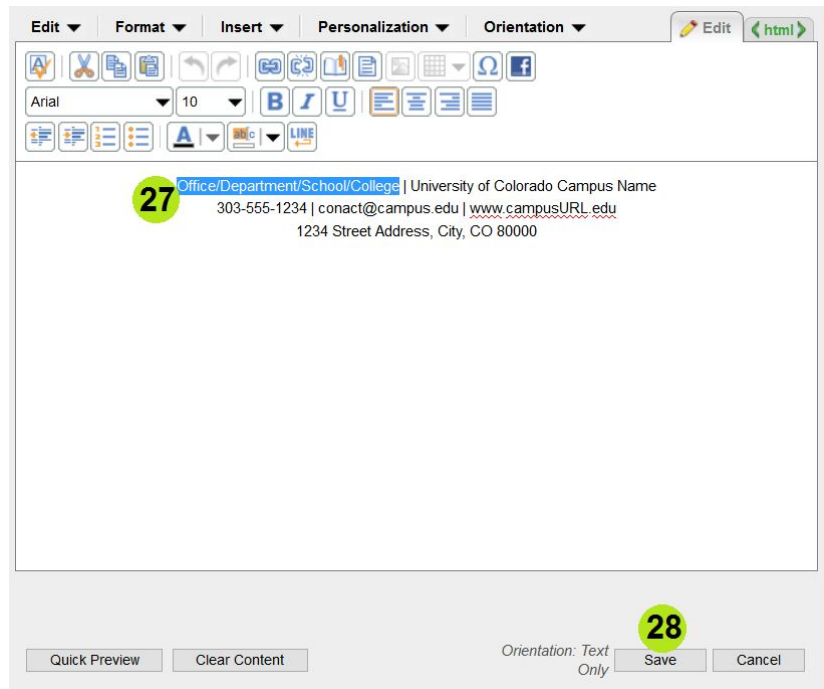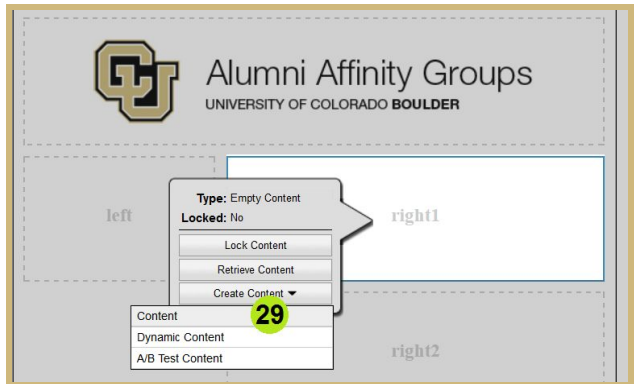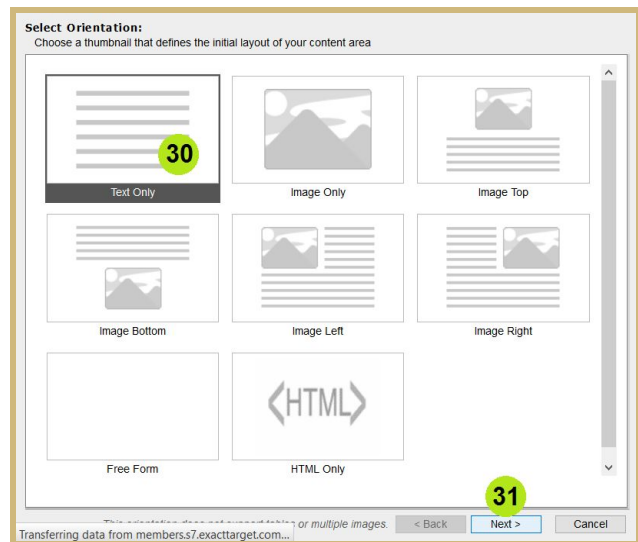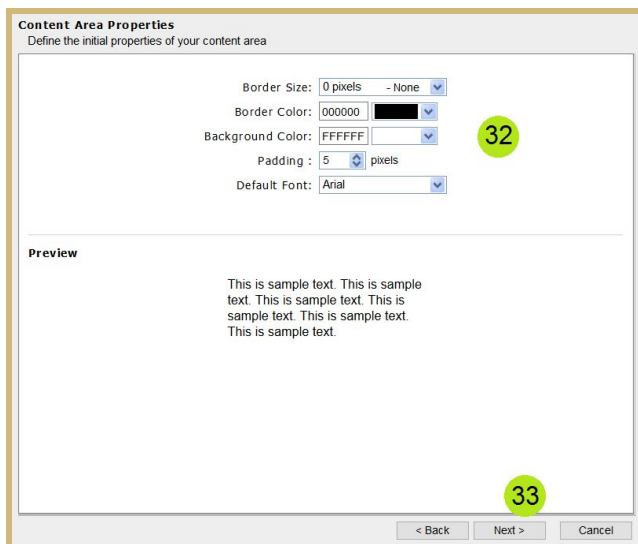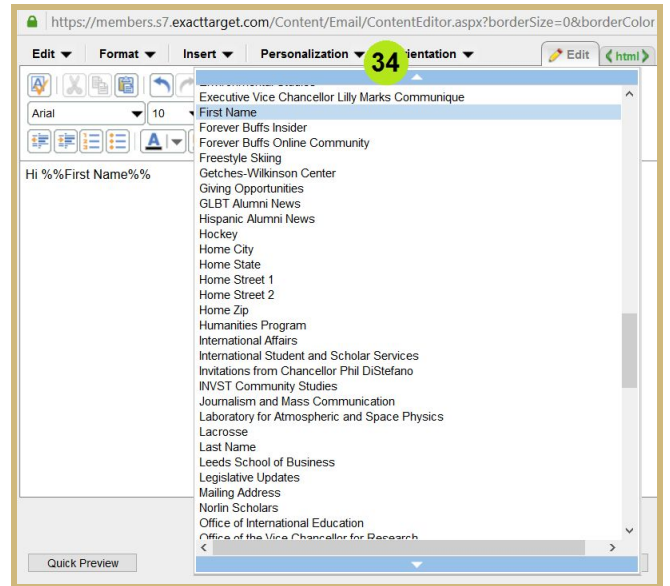
Personalization can be added two ways.

a. By typing %% before and after the field name, for example:
%%First Name%%.

b. Or by selecting the field from the Personalization list.

Note the personalization list includes all of the email preference fields as well as the Personalization fields. Below is a list of the current personalizations available.

Field Name	Personalization String	Example
Email Address	%%Email Address%%	MickeyMouse@disney.com
First Name	%%First Name%%	Mickey
Last Name	%%Last Name%%	Mouse
Advance ID	%%Advance ID%%	1000000
Preferred Name	%%Preferred Name%%	Mickey
Prefix	%%Prefix%%	Mr
Home Street 1	%%Home Street 1%%	1234 Disney Way
Home Street 2	%%Home Street 2%%	Apt A
Home City	%%Home City%%	Orlando
Home State	%%Home State%%	FL
Home Zip	%%Home Zip%%	74174
Mailing Address	%%Mailing Address%%	1234 Disney Way Orlando, FL 74174 United States

Contact_ID	%%Contact_ID%%	003o000000YVXRT

Changing Content Area Type anding a Image

35. From the top of the wysiwyg editor select 'Orientation' and then 'Image Bottom'.
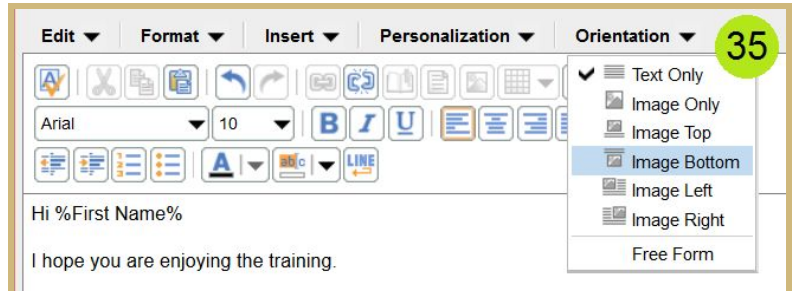
36. Click the insert image icon.
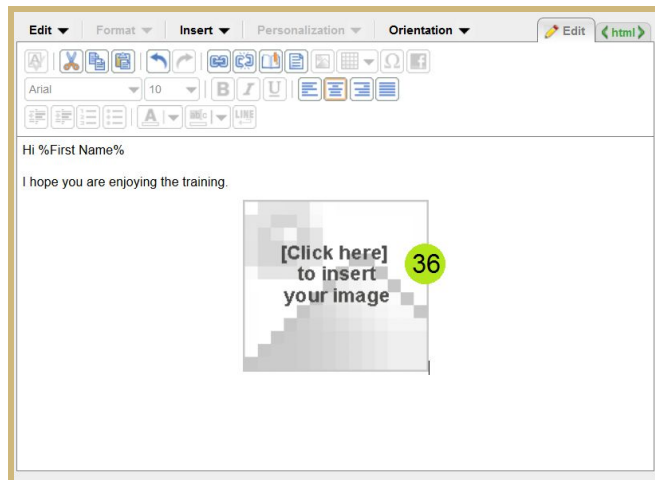
37. Select the 'Shared Portfolio Folder' and the 'CU branded buttons'
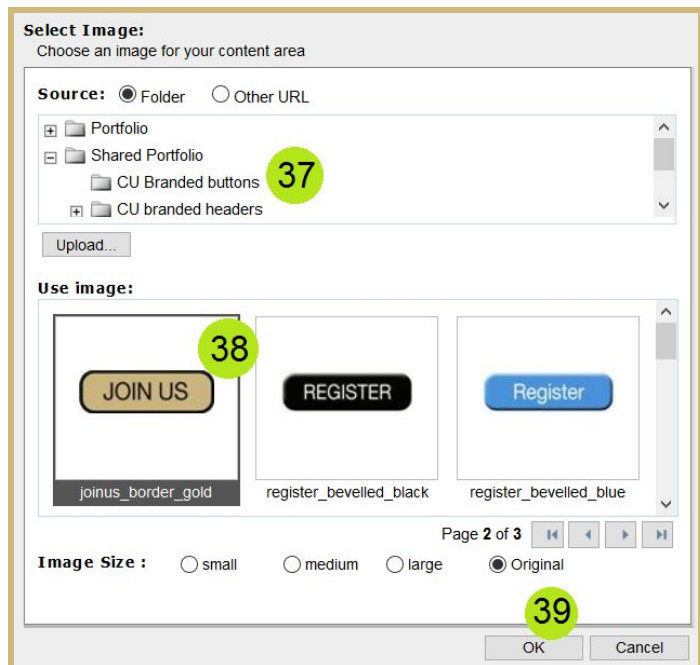
38. Select the button you would like to use. Not there are several pages of buttons.

39. Click 'Ok' to continue.

40. Select the 'HTML' tab to view and edit the content html.
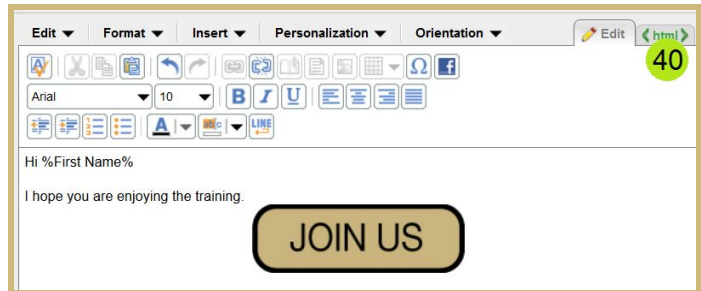
41. To ensure the button renders correctly on mobile devices add the !important tag to the image. This is not required but should be added if the images are not rendering correctly on mobile.
42. Click 'Edit' tab to go back to the wysiwyg editor.

Add a Second Image to the Section

43. From the top of the wysiwyg editor select 'Orientation' and then 'Image Top'.

Repeat choosing Image Left and Image Right. Notice how the editor automatically reformats the content.
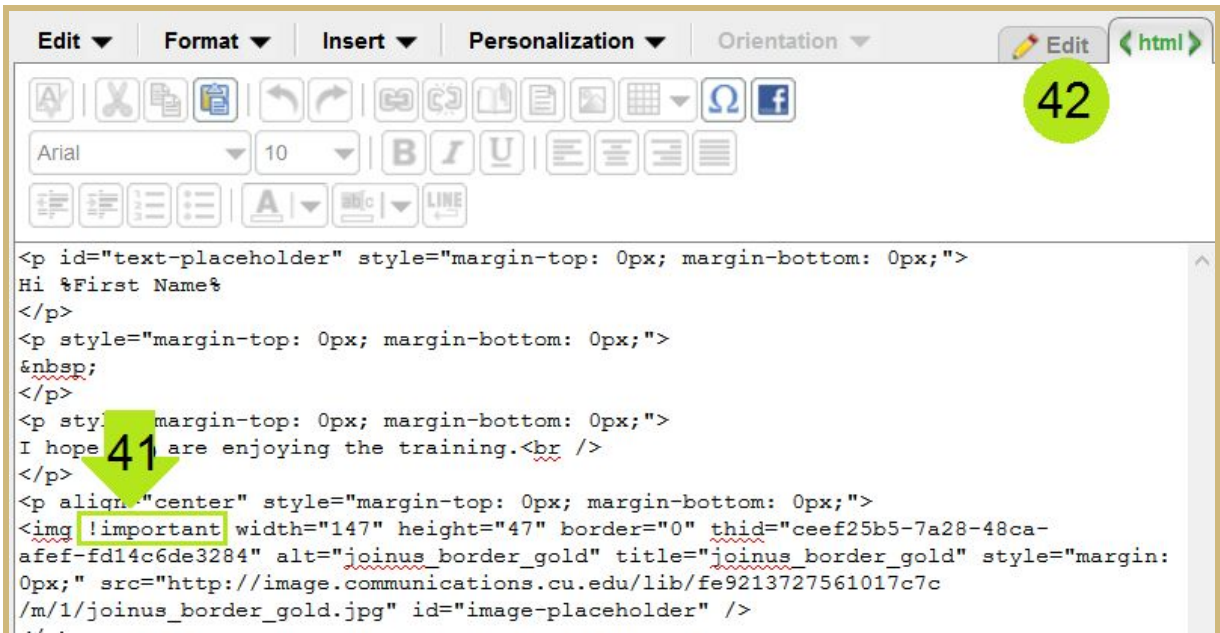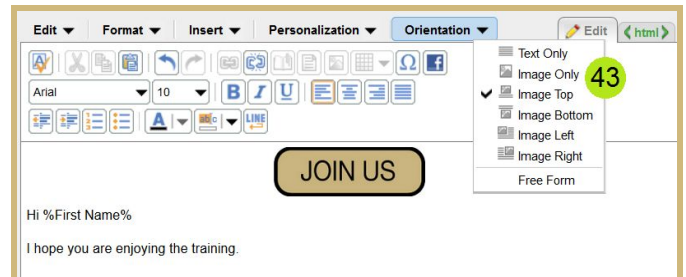
44. Now select ''Free Form' from the Orientation list.

45. Click 'OK' to continue.

> You have chosen to switch to Free Form mode. Once you enter Free Form, you cannot switch back to Smart Orientations. Click OK to confirm that you want to change to Free Form.
>
> OK   Cancel
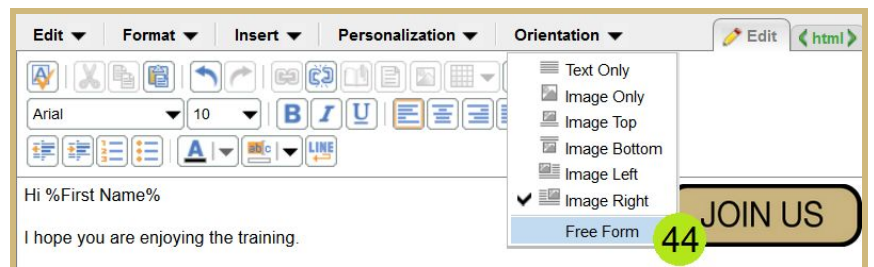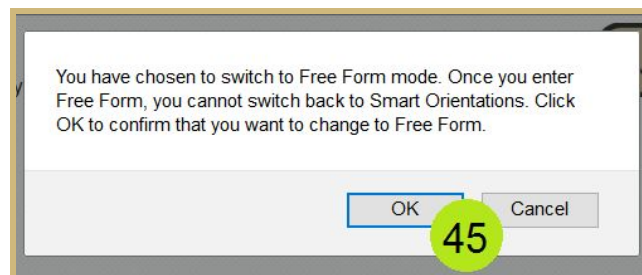
46. The insert image icon is now enabled. Click the icon to add a second image.
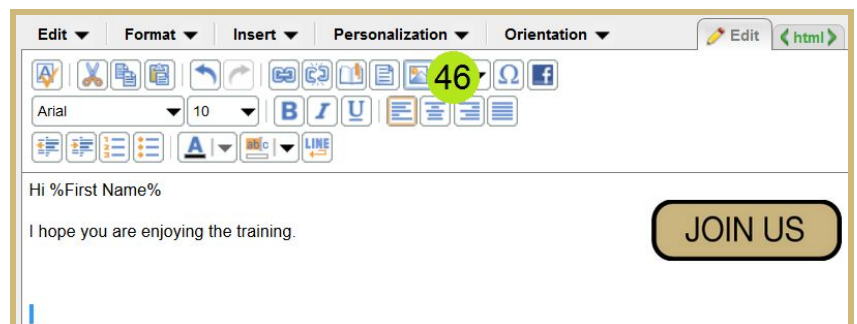
47. Select 'Other URL'

48. Enter URL of an image. For example:
http://www.cu.edu/sites/
default/files/media_crop/
685/public/ath_ralphie.png

49. Click 'OK' to continue.

50. Click 'preview' tab to preview the email.
51. Then click 'Mobile' icon to preview as mobile.
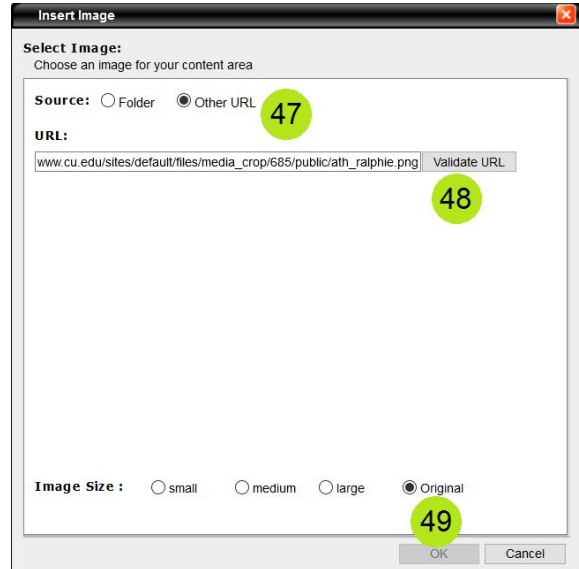
Additional Email Steps
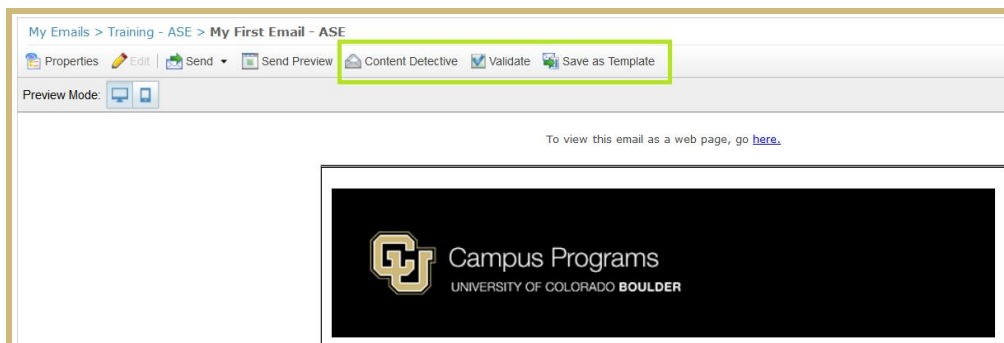
Content Detective will validate your email for any Spam filter issues.

Validate will validate that any code or personalizations used in the email are correct.

Save as Template will save the email with the content as a template in the 'My Templates' folder.

Email Send

From Email Folder

1. From the email folder select the Email you would like to send by clicking the check box.
2. Next click 'Send' and then 'Guided Send'
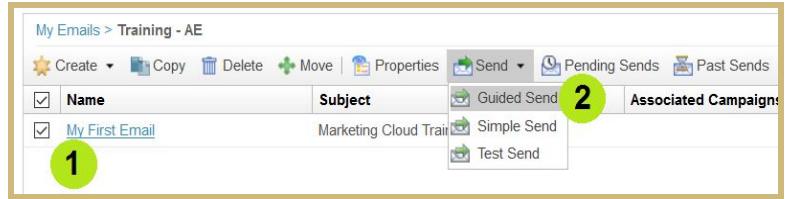
From Email

1. /2. If you are already in the email simply click 'Send' and then 'Guided Send'.

3. Click 'Next' to continue into the Guided Send Wizard.
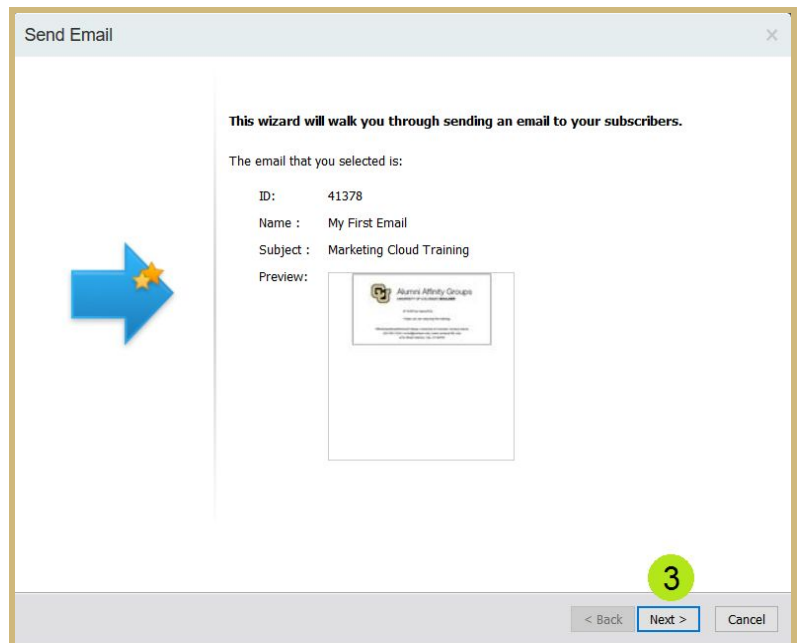
4. Select the Recipient Source of 'Salesforce reports or campaigns'.

🚫 Do NOT select the first option.

✅ Always select 'Salesforce reports or campaigns'.

5. Click 'Next' to continue.
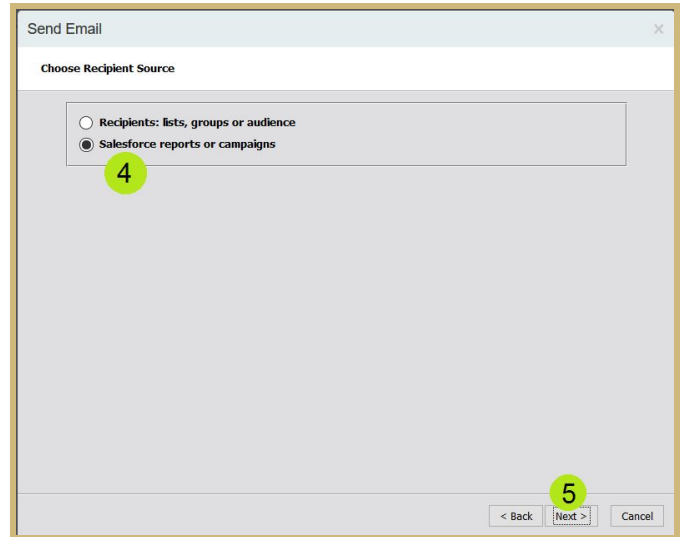
6. Click the first 'Add' button to add an inclusion report.

➡️ An **Inclusion Report** is the list of contact the email will be sent to.

➡️ **Campaigns** will be used for the inclusion list when the send is related to Cvent Events and Contact ID list l loads (eg: Advance IDs Employee IDs ect).

Contact your MEC for help with ID upload list.
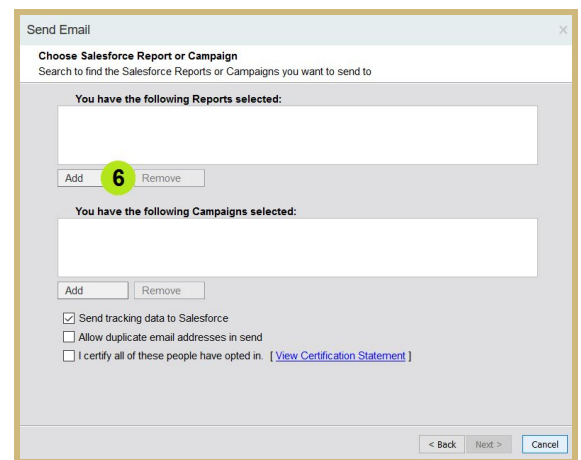
7. Enter the Name or part of the name of the report you want to use.

➡️ You need to know the names of your salesforce reports.

8. Click the 'Find Now' button.
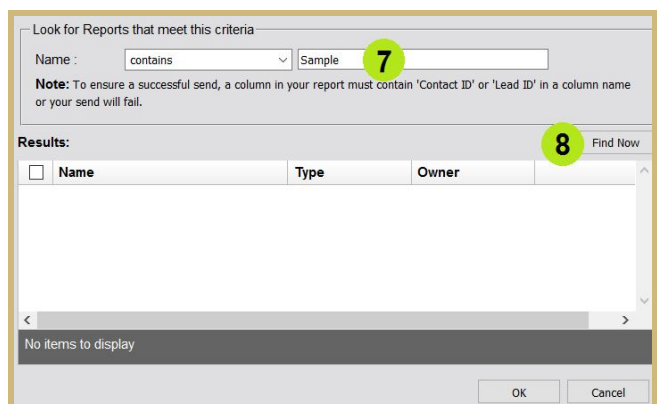
9. Select the report you want to use by checking the checkbox next to the report.

10. Click 'OK' to continue.

11. Update Check boxes.

    a. Send tracking data to Salesforce. Checked by default, uncheck the email does not need to be tracked in Salesforce.

    b. Allow duplicate email address in send. Unchecked by default, check only if there is a need to send the email to the same email address more than once.

    c. Check the 'I certify all of these people have opted in.' This box must be checked to continue.

12. Click the 'Next' button to continue.

13. Select the exclusion report for your department.

➡️ An **Exclusion Report** is the list of contacts the email should NOT be sent to even if the contact is on the inclusion list. these are the people that have opted out of the emails.

14. Click 'Next' to continue

Send Email ✕

Exclude Salesforce Report or Campaign
Search to find the Salesforce Reports or Campaigns you want to exclude from sending to

You have the following Reports selected:

13

Add | Remove

You have the following Campaigns selected:

Add | Remove

14

< Back | Next > | Cancel

15. Enter the Name or part of the name of the report you want to use.

16. Click the 'Find Now' button.

Look for Reports that meet this criteria

Name : contains | 09_UNSUB_Advancement Events 15

Note: To ensure a successful send, a column in your report must contain 'Contact ID' or 'Lead ID' in a column name or your send will fail.

Results: 16 Find Now

☐ Name	Type	Owner

No items to display

OK | Cancel

17. Select the report you want to use by checking the checkbox next to the report.

➡️ All unsubscribe reports have the word 'UNSUB' in them.

18. Click 'OK' to continue.

Look for Reports that meet this criteria

Name : contains | 09_UNSUB_Advancement Events

Note: To ensure a successful send, a column in your report must contain 'Contact ID' or 'Lead ID' in a column name or your send will fail.

Results: Find Now

☐ Name	Type	Owner
☑ 09_UNSUB_Advancement Events	Report	Anne Early

17

Page 1 of 1 (4 items) 1

18

OK | Cancel

19. You can update the Email Subject.

Send Email

Set Send Options
Set the from name, subject line and other options for this send

Subject : Welcome to Ecomm   Insert ▼

20. From Options/Send Classifications
   a. Always select a Send Classification. Do Not select first Radio Button option.
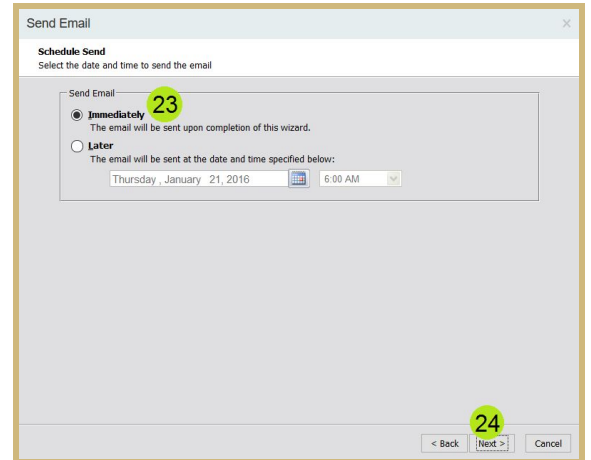   b. Once you have selected a Send Classification verify that the delivery profile is 'CU FOOTER FOR ALL EMAIL"

From Options

A
○ Use the following from name and address
● Select a send classification
  CU Advancement Events
  ☐ Overwrite sender profile with :   CU Advancement Events
  ☐ Overwrite delivery profile with :   CU FOOTER FOR ALL EMAIL   ✓   B

   c. Do NOT select a send classification of 'Default Commercial' or 'Default Transactional'

From Options

○ Use the following from name and address
● Select a send classification
  CU Advancement Events
  Advancement
  CU Advancement Events
  C   Default Commercial
  Default Transactional   🚫   **!Important!**
  Sen   Johnnie Ray Vice President Ad
  matt.roush@cu.edu   **NEVER Select a send classification of**
  ☑ test advancement classificatio   **'Default Commercial' or 'Default Transactional'**
  ☑ Test Email List Send Classification

21. Select location of tracking information, by default it will be saved in the "My Tracking" folder. If subfolders have been created a subfolder can be selected.

Send Options
☑ Send As Multipart MIME
☑ Track all links found within this email
☐ Suppress this send from reports

Tracking Destination:
21   My Tracking

Testing Options
☐ Send all emails to:
Note: An email for each subscriber in your list will be sent directly to the address you enter
above (i.e. selecting a list with 50 subscribers will send all 50 emails to the test address)   22

< Back   Next >   Cancel
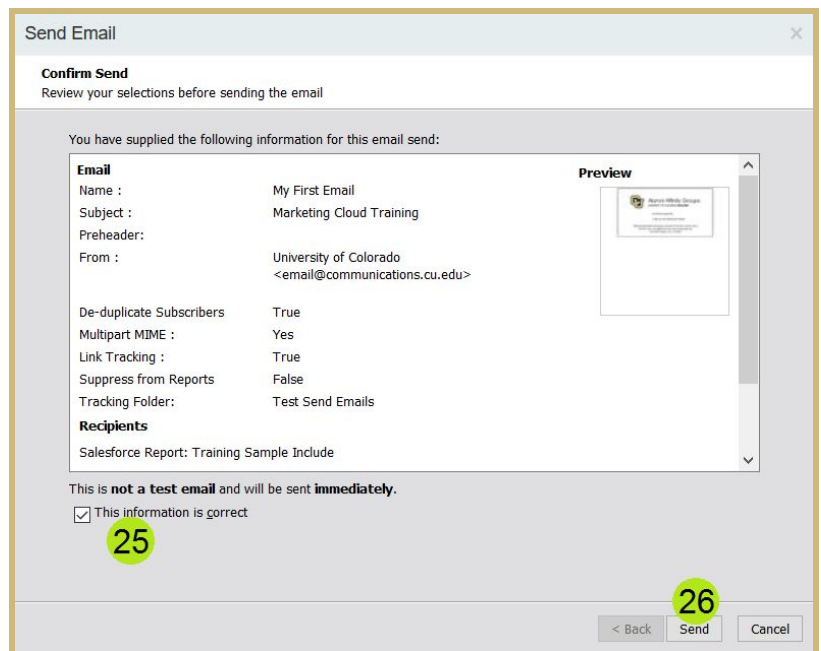
22. Click 'Next' to continue.

23. Select Send Time.
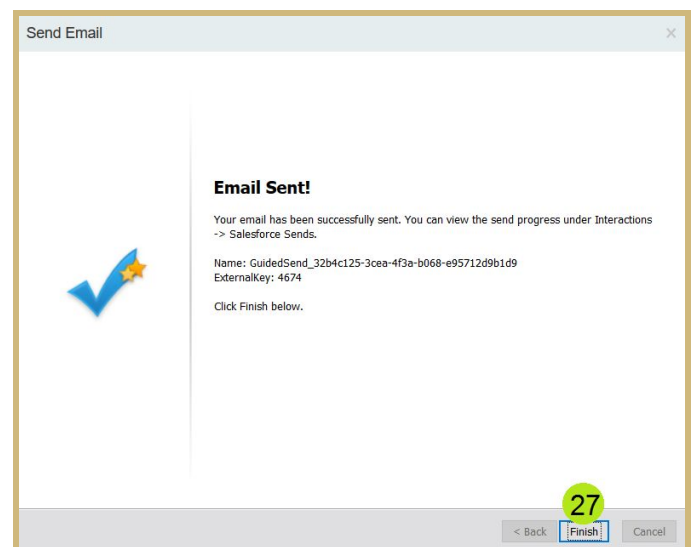
24. Click 'Next' to continue.

25. Confirm information Send information is correct and check the 'This information is correct' checkbox.

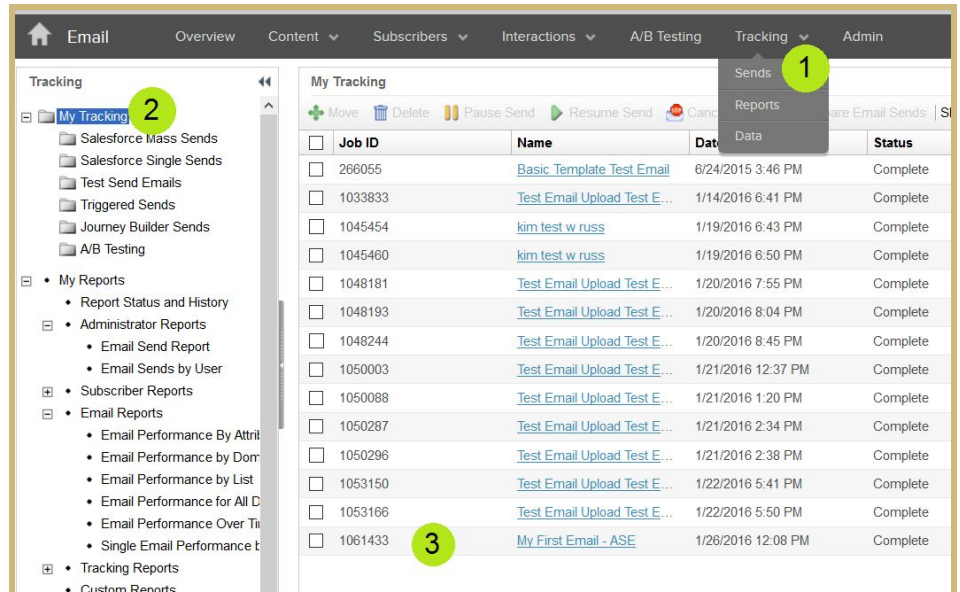26. Click the 'Send' button to send the email.
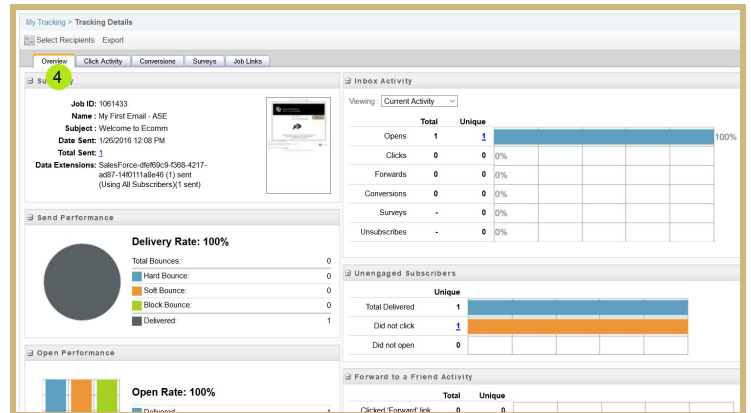
27. Email Sent! Click 'Finished'

Email Tracking

1. To view email tracking information select the 'Tracking Tab' then 'Sends'
2. Click into the 'My Tracking' folder on the left.
3. Click on the Email Name hyperlink to view the tracking information

4. The 'Overview' tab provides open rate information.

5. The 'Click Activity' tab provides click rates for each link included in the email.
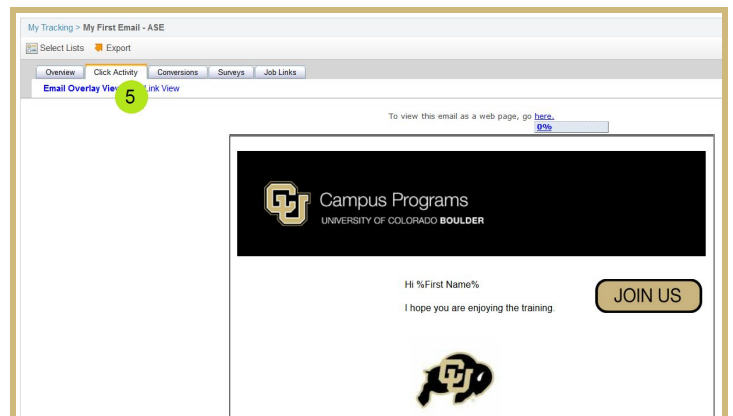
Additional Resources

Marketing Cloud Help

To find Marketing Cloud help, click the arrow next to your name at the top right of the screen and select 'Marketing Cloud Help'