



Salesforce Marketing Cloud Training #1: Intro & Creating Emails

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Your Migration Cycle

- **Week of 10/12:** Group Training #1: Creating Emails
- **Week of 10/19:**
 - Group Q&A Call – Monday, 10/19 at 2:00pm ET
 - Group Training: Managing Lists & Segments – Thursday, 10/22 at 1:00pm ET
- **Week of 10/26:**
 - Group Q&A Call – Monday, 10/26 at 2:00pm ET
 - Group Training: Reports – Wednesday, 10/28 at 2:00pm ET
- **Week of 11/2:**
 - Group Q&A Call – Monday, 11/2 at 2:00pm ET

SMC Training #1: Admin & Creating Emails

- Navigating the SMC Admin
- How to Create an Email
- Images
- Test Sends
- Newsletter Profile Page
- Additional SMC Resources & Support Questions

SMC: Campaigns vs Emails

Campaign:

A group of marketing *communications*: social, email, etc related to a particular event

Email:

All of your saved, delivered and tracked emails in SMC

Example:

Spring Pledge 2016 Campaign can contain:
Apr15R1 email, Apr15R2 email, Pre-Drive Tweets,
Facebook messages, etc on your calendar

SMC Admin View

Station
Business
Unit (MID)



salesforce marketing cloud CALENDAR PULSE CAMPAIGNS PLAYBOOKS Feedback NPR Demo Welcome DS - Station Adm...

Email Mobile Social Ads Web Data & Analytics Marketing Automation Content HubExchange

Welcome to the Salesforce Marketing Cloud! Mouse over the tips to find out more about these features.

Calendar OCTOBER 2015

Mon	12 Tue	13 Wed	14 Thu	15 Fri	16 Sat	17 Sun
	Test Marketing Forms (Fall Pledg)					

Pulse

Email: None Scheduled | Fans: Click to learn More... | Followers: Click to learn More...

Campaigns Search View By Status All

Name	Status	Deployment Date	Created Date	Campaign Owner	Campaign Code
Oct15 Fall Pre-Pledge Drive	In Process	October 23, 2015	October 2, 2015	DS - Jenny Golden	102315Pledge_EmailCampaign

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Creating Emails

Admin>>Email >> Content

SMC: Emails, Templates & Content Blocks

SAMPLE HEADER IMAGE
620x100

This is a heading block that can
pro

SAMPLE HEADE
620x100

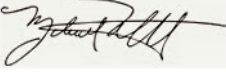
Dear Doris,

It's exciting to think all of all the opp
fundraiser.

We got off to a great start last week
our goal of \$1.2 million and be able

KSTS has never received a challen
call 800-909-9287.

This \$600,000 will go a long way in



Walter P. White
Director of Membership

P.S. Today is also your last chance
Watch.*

KTST | VERY WIDE LOGO

My Contents > NPRDS Content Blocks

★ Create ▾ 🗑 Delete ➕ Move | 📄 Properties

	Name	Type
<input type="checkbox"/>	Hero	Content
<input type="checkbox"/>	Subheader	Content
<input type="checkbox"/>	100x84Logo Banner	Content
<input type="checkbox"/>	200x70Logo banner	Content
<input type="checkbox"/>	300x250 Promo	Content
<input type="checkbox"/>	70x70Logo_Banner	Content
<input type="checkbox"/>	Hero No Hed	Content
<input type="checkbox"/>	Letter	Content
<input type="checkbox"/>	Story	Content
<input type="checkbox"/>	Story_2Col	Content
<input type="checkbox"/>	Story_No Button	Content
<input type="checkbox"/>	Story_No Image	Content
<input type="checkbox"/>	300x70logo_Banner	Content
<input type="checkbox"/>	Headline	Content
<input type="checkbox"/>	620x100_banner	Content

SHOW PREVIEW

300x250
Ad Unit

My Emails>>NPRDS Email Templates

Content

- My Emails
 - NPRDS Email Templates**
- My Templates
- Portfolio
 - Banners
 - Forward to a Friend
 - News Images
 - Social
- My Contents
 - NPRDS Content Blocks

My Emails > NPRDS Email Templates > 1 Col Newsletter with Images


Properties Edit Send Send Preview Content Detective Validate Save as Template


Show content borders

Click to edit this content block

SAMPLE HEADER IMAGE
620x100

This is a heading block that can promote anything.

 **Public Movement: Now In The Common Square!**
There are exciting challenges in supporting new devices and technology, but often we're on our
[Read More](#)

 **Public Movement: Now In The Common Square!**
There are exciting challenges in supporting new devices and technology, but often we're on our
[Read More](#)

My Contents>>NPRDS Content Blocks

The screenshot shows a web browser window titled "Edit Content" with the URL <https://members.s6.exacttarget.com/Content/Email/ContentEditor.aspx?mode=Edit&templateshellid=0&contentid=101515&isUtility=1&EntityContentisFor=C>. The interface includes a menu bar with "Edit", "Format", "Insert", "Personalization", and "Orientation". Below the menu is a rich text editor toolbar with icons for undo, redo, bold, italic, underline, link, unlink, list, and table. The main content area displays two identical content blocks side-by-side. Each block features a photograph of a crowd of people, a headline "Public Movement: Now In The Common Square!", a sub-headline "There are exciting challenges in supporting new devices and technology, but often we're on our", and a blue "Read More" button. A red callout box on the right side of the image contains the text "Right click to swap in new image" with a blue arrow pointing to the right image.

Editing WYSIWYG Content Blocks

- To edit images
 - Upload new images to your Portfolio
 - IMPORTANT: Right-click to replace images. Don't delete!
- To edit text
 - Don't select text and delete. Backspace to first letter to keep formatting
- You can edit NPRDS content blocks and save them to re-use in My Content

My Templates

Content

- My Emails
 - NPRDS Email Templates
- My Templates**
- Portfolio
 - Banners
 - Forward to a Friend
 - News Images
 - Social
- My Contents
 - NPRDS Content Blocks

Templates are HTML wireframes to contain WYSIWYG content blocks

The screenshot displays the 'My Templates' editor interface. At the top, the breadcrumb path is 'My Templates > V2 NPRDS Core Template'. Below this is a toolbar with 'Save', 'Delete', and 'Cancel' buttons. A secondary toolbar contains 'Edit', 'Insert', and 'Personalization' dropdown menus. The main workspace is a vertical stack of content blocks, each labeled with its name: Banner, Hero, Teaser1, Teaser2, Teaser3, Teaser4, Teaser5, Teaser6, and Teaser7.

Portfolio: Images

The screenshot shows the SMC Portfolio interface. The top navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', 'A/B Testing', 'Tracking', and 'Admin'. The left sidebar shows a 'Content' menu with folders for 'My Emails', 'My Templates', 'Portfolio', and 'My Contents'. The 'Portfolio' folder is expanded to show 'Banners', 'Forward to a Friend', 'News Images', and 'Social'. The main content area displays 'Portfolio > Banners' with a search bar and 'Delete' and 'Move' buttons. A table lists the following image:

<input type="checkbox"/>	Name	Size (KB)	Width (px)	Height (px)
<input type="checkbox"/>	genericQPStationBANNER.jpg		620	100

A tooltip for the image shows a placeholder: 'SAMPLE HEADER IMAGE' with a small 'img alt="Sample Header Image" data-bbox="571 401 661 421' label below it.

Download any Lyris images and upload them to your SMC Portfolio if you want to use them in new emails

SMC: Copy a NPRDS Email

- Go to My Emails >> NPRDS Email Templates
 1. Select a template, check box and click COPY
 2. Name it something unique: “Test Send Newsletter Oct 14”
 3. Type in subject
 4. Location: Add to My Emails or Create New Folder, “TEST Emails” by right-clicking on My Emails folder
 5. Click Save

SMC: Edit NPRDS Email

- Right-click on each block to MODIFY CONTENT

The screenshot displays the SMC (Send My Content) interface for editing an NPRDS email template. The interface is divided into several sections:

- Navigation Menu (Left):** Shows a hierarchy of folders including 'My Emails', 'NPRDS Email Templates', 'My Templates', 'Portfolio' (with sub-items: Banners, Forward to a Friend, News Images, Social), and 'My Contents' (with sub-item: NPRDS Content Blocks).
- Top Toolbar:** Contains navigation tabs (Email, Overview, Content, Subscribers, Interactions, A/B Testing, Tracking, Admin) and utility buttons (Feedback, NPR Demo, Welco).
- Content Area:** Displays the email template being edited. The breadcrumb path is 'My Emails > NPRDS Email Templates > 1 Col Newsletter with Images test Jenny'. The toolbar above the content area includes 'Properties', 'Edit', 'Send', 'Send Preview', 'Content Detective', 'Validate', and 'Save as Template'. A 'Show content borders' checkbox is checked.
- Context Menu:** A right-click context menu is open over a content block. It shows the following information and options:
 - Type: Standard Content
 - Locked: No
 - Clear Content
 - Lock Content
 - Modify Content
 - Store Content in Library
- Content Blocks:** The main content area features a header with the text 'This is a [redacted] block that can promote anything.' Below this are three article blocks, each with a small image and the headline 'Public Movement: Now In The Common Square!'. Each article block includes a 'Read More' button.

SMC: Test Sends

When done editing your email:

1. Choose preview to see it in desktop and mobile (not exact—you have to look on your phone)
2. Content Detective if you want to check for possible spam flags
3. Choose SEND>> **TEST SEND** to send to your email

4. We'll talk about other send options when we cover list management

SMC: Create a New Email

Select NPRDS, SMC or create your own HTML template then you can create a new email

To create a new email with NPRDS template:

My Emails>>Create>>Template-Based>>My Templates>>Choose V2NPRDS template

To create a new email with SMC template:

My Templates>>Create>>Classic Templates>>Use Template Editor>>Change Layout & Save

Then, go to My Emails>>Create>>Template-Based and choose new template

SMC Newsletter Sign Up Page: Review



Sign up for newsletters here

First Name

Last Name

Email Address *

Email Subscriptions

- KUT News
- KUTX Music
- Cactus Cafe
- Membership
- Volunteer

1. Upload your new banner to Portfolio>>banner and send title of email to campaign@ds.npr.org
2. Sign up with a gmail account and view Welcome email
3. Review newsletter titles

Homework

1. Login as an admin
2. Go to Email >> Portfolio and upload your QP or a new email banner
3. Go to Email and Copy a NPRDS email
4. Edit the Content Block for the banner
5. Send a TEST SEND to yourself and view on mobile phone and desktop
6. Go to your Profile Page to review
 1. <http://pages.et.npr.org/cpc?bu=MID>
7. Send an email to campaign@ds.npr.org with the name of your banner image
8. Review SMC resources in 3Sixty, etc
9. Review Lyris newsletters to see which ones you will recreate in SMC
10. Continue to test creating emails to replace your Lyris templates and send TEST SENDS only
11. Review lists and segments in Lyris to prepare for group training on 10/22

SMC: Support & Questions

■ Any Questions?

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SMC Learning Materials

Not everything applies to NPRDS version but it's good background:

[SMC Admin Navigation](#)

[Create Your First Email](#)