Salesforce Marketing Cloud
Training #1: Intro & Creating Emails
Your Migration Cycle

- **Week of 2/1:** Group Training #1: Creating Emails

- **Week of 2/8:**
  - Group Training: Managing Lists & Segments – Monday, 2/8 at 3:00pm ET

- **Week of 2/15:**
  - Group Training: Reports – Tuesday, 2/16 at 2:00pm ET

- **Week of 2/22:**
  - Launch Week. *All stations must be off Lyris by 2/29/16*
SMC Training #1: Admin & Creating Emails

- Introduction to list management in SMC
- Retrieving Segment Data from Lyris
- Navigating the SMC Admin
- How to Create an Email from NPR DS Templates
- Additional SMC Resources & Support Questions
Lists in SMC

- Lists in SMC live in **Data Extensions**
- Data Extensions are like spreadsheets containing multiple fields for information about your subscribers
Lists in SMC

- Your primary list lives in Master Subscriber Data Extension (DATA EXTENSIONS>>MASTER SUBSCRIBER DATA)
- You must use this list to build segments for any newsletters you want listed on your profile page.
**Steps to Migrate Lyris List to SMC**

- Map Lyris fields needed for segments to SMC fields in NPR DS Worksheet
- Make note of fields needed for all segments
- Let NPR DS know if there are fields needed that don’t map to standard SMC Master Data Extension
- Export active emails from Lyris
- Upload contacts to SMC
- Build segments inside SMC needed for common sends
In Lyris, segments are made by defining criteria by which the system should filter your master list to send to a subset of your contacts.

In SMC, the same instructions are set up as filtered data extensions.

Use [this worksheet](#) to make note of the instructions behind your current Lyis Segments:

- Log into Lyris [http://lyrishq.net](http://lyrishq.net)
- Click on Launch Email Labs in left-hand column
- Click on your master list
- Click on “Segments” under “Advanced Features”
- Click “edit” number the segment you want to copy
Introducing the SMC Admin
SMC Admin View

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

Calendar: October 2015

Pulse

Campaigns

View By Status

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 Geidten | 102315Pledge_EmailCampaign

npr digital services
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
Login to SMC Admin at http://mc.exacttarget.com

Hover over the email icon (top-left) & click on “Email” to get to Email dashboard.

Primary links:
- CONTENT >> EMAIL – Create & manage emails
- CONTENT >> PORTFOLIO – Upload Images
- SUBSCRIBERS >> DATA EXTENSIONS – Manage Lists
- OVERVIEW – Return to Email Dashboard
Creating Emails

Admin >> Email >> Content
Exercise - Create & Send a Test Email

- Copy email template to My Emails
- Upload a Banner and other images
- Re-use saved content blocks
- Run a test send
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
Dear Doris,

It's exciting to think of all of the opportunities this $500,000 can bring to our cause. We have a goal of $1.2 million and are looking for your help.

KSTS has never received a challenge like this before. If you have any questions, please call 800-909-9287.

This $50,000 will go a long way in our efforts.

Walter P. White
Director of Membership

P.S. Today is also your last chance Watch.
My Emails >> NPRDS Email Templates

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

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!
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Read More

Right click image & select, “image properties” to swap in new image
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
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
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
Homework

1. Upload a logo or banner for use on your profile page & let us know the file name.
2. Review Lyris newsletters to see which ones you will recreate in SMC
3. Continue to test creating emails to replace your Lyris templates and send TEST SENDS only
4. Document the criteria for your segments in preparation for group training on 2/8
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