



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

Data Extensions > Master Subscriber Data > Station_Subscribers_Master - 1

Station Subscribers Master - 1 Available

Master data extension schema for XPN Properties Records Tracking Manage Policies Send

EXTERNAL KEY [?](#)
Station_Subscribers

Created Date: Tuesday, October 13, 2015 4:51 PM by DS - Station Onboard
Last Modified Date: Tuesday, December 15, 2015 6:36 PM by DS - Jenny Golden
Owner: DS - Station Onboard [Edit](#)

LOCATION
 Master Subscriber Data [Change](#)

Type: Standard

USED FOR SENDING: Yes
USED FOR TESTING: No [Edit](#)

SUBSCRIBER RELATIONSHIP
CTCT_Email_em relates to Subscribers on Subscriber Key

134,096 Records
DATE LAST IMPORTED: Monday, November 16, 2015 5:40 PM by DS - Jenny Golden

Fields

Name	Data Type	Length	Primary Key	Nullable	Default Value
NPRMF_FormTitle_str	Text	25	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
NPRMF_Date_dt	Date		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
NPRMF_InitialReferrer_str	Text	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
NPRMF_InternalName_str	Text	25	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
NPRMF_MarketSource_str	Text	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
NPRMF_Referrer_str	Text	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
NPRMF_SearchEngine_str	Text	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
NPRMF_SearchString_str	Text	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
NPRMF_UserAgent_str	Text	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CTCT_Interests_str	Text	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CTCT_NewsletterSelection_str	Text	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CTCT_Address1_str	Text	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CTCT_Address2_str	Text	50	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CTCT_City_str	Text	50	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CTCT_State_str	Text	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CTCT_Zip_str	Text	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

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.

The screenshot displays the Salesforce Marketing Cloud interface. On the left, a navigation pane titled 'Subscribers' shows a tree view with 'Data Extensions' expanded to 'Master Subscriber Data'. The main content area shows the 'Master Subscriber Data' extension details, including a search bar and action buttons (Delete, Move, Send). Below this is a table with columns for Name, Type, and Sendable.

<input type="checkbox"/>	Name	Type	Sendable
<input type="checkbox"/>	Station_Subscribers_Master - 1	Standard	Yes

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

Lyris Data Migration – What is a Segment?

- 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 Lyris Segments:
 - Log into Lyris <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

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...

TODAY

Pulse Expand

Email Fans Followers

None Scheduled Click to learn More... 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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SMC Vocabulary: 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

- 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

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

<input type="checkbox"/>	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

npr digital services

My Emails >> NPRDS Email Templates

The screenshot shows the NPRDS Email Templates editor interface. The top navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', 'A/B Testing', 'Tracking', and 'Admin'. The left sidebar shows a tree view of content categories, with 'NPRDS Email Templates' selected. The main editor area displays a newsletter template with the following components:

- Header Image:** A dark gray banner with the text 'SAMPLE HEADER IMAGE' and '620x100'.
- Heading Block:** A large heading that reads 'This is a heading block that can promote anything.' A red callout box with an arrow points to this block, stating 'Click to edit this content block'.
- Article Block 1:** A block containing an image of a crowd, a heading 'Public Movement: Now In The Common Square!', a paragraph of text, and a 'Read More' button.
- Article Block 2:** A duplicate of the first article block.

My Contents>>NPRDS Content Blocks

Right click image & select, "image properties" to swap in new image

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](#)

Orientation: Free Form Save Cancel

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. A red box at the bottom right contains the text: '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 tree view of content categories including "My Emails", "My Templates", "Portfolio" (with sub-items: Banners, Forward to a Friend, News Images, Social), and "My Contents" (with sub-item: NPRDS Content Blocks).
- Toolbar (Top):** Contains navigation tabs (Email, Overview, Content, Subscribers, Interactions, A/B Testing, Tracking, Admin) and utility buttons (Feedback, NPR Demo, Welco).
- Content Area (Right):** Displays the email template being edited, titled "1 Col Newsletter with Images test Jenny". The template includes a header with "SAM" and "R IMAGE", a main headline "This is a [redacted] block that can promote anything.", and three content blocks, each featuring an image of a crowd and the headline "Public Movement: Now In The Common Square!".
- Context Menu (Overlaid):** A right-click context menu is open over the first content block, showing options: "Type: Standard Content", "Locked: No", "Clear Content", "Lock Content", "Modify Content", and "Store Content in Library".

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

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

SMC: Support & Questions

- Any Questions?

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Janeen Williamson – jwilliamson@npr.org, (617)622-5443

SMC Learning Materials

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

[SMC Admin Navigation](#)

[Create Your First Email](#)