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**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
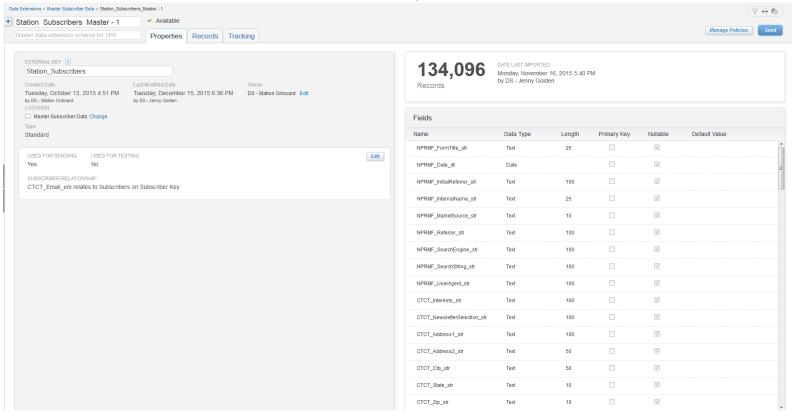
- **Week of 2/22:**
  - Launch Week. **All stations must be off Lyris by 2/29/16**

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

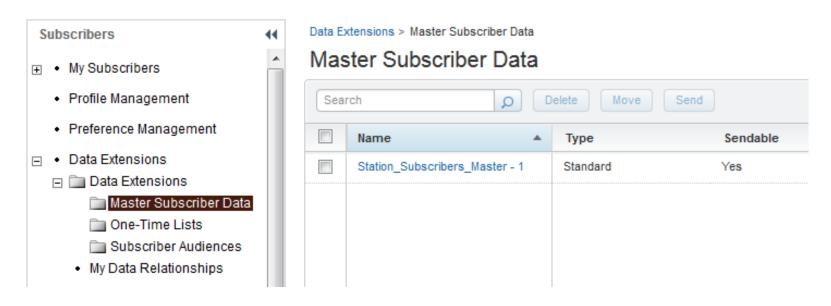- Additional SMC Resources & Support Questions

Lists in SMC

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

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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.
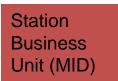
Steps to Migrate Lyris List to SMC

- 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
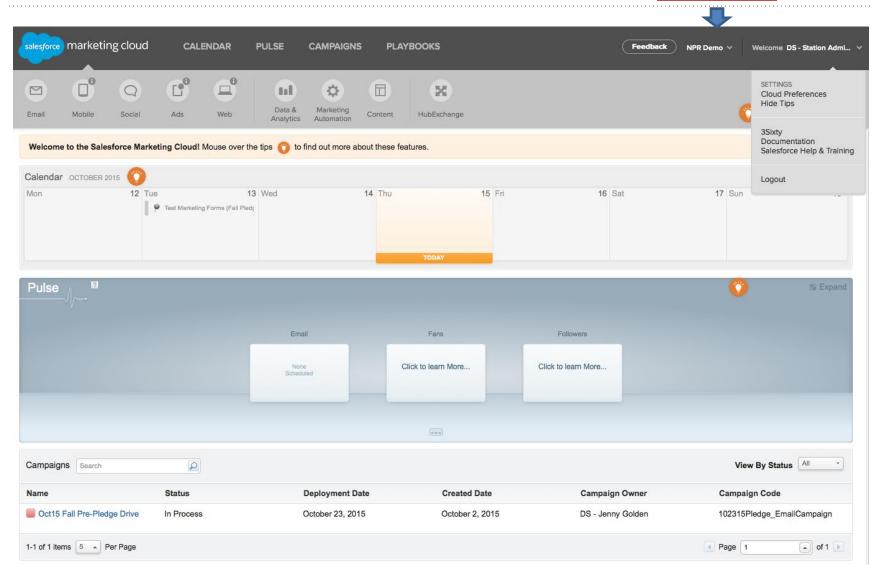- Build segments inside SMC needed for common sends

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 Lyis 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

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Introducing the SMC Admin

SMC Admin View

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

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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

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SMC: Emails, Templates & Content Blocks

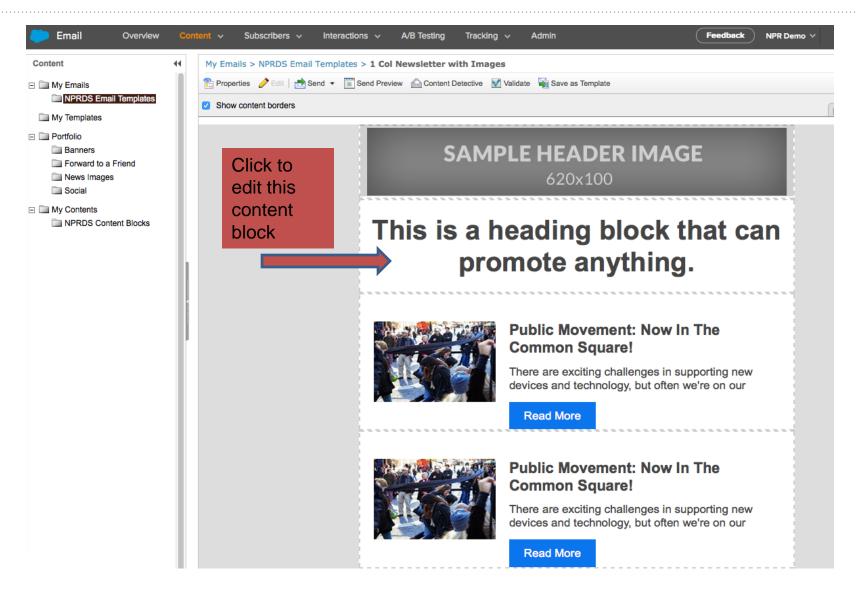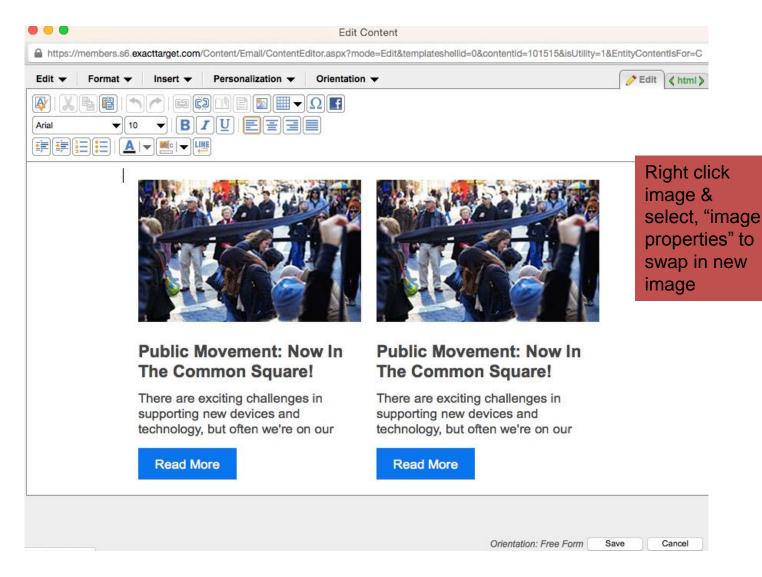**SAMPLE HEADER IMAGE**
620x100

KTST | VERY WIDE LOGO

This is a heading block that can pro

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 challeng 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.*

SAMPLE HEADE
620x100

Hero

Teaser1

Teaser2

Teaser3

My Contents > **NPRDS Content Blocks**

⭐ Create ▾ 🗑 Delete ➕ Move | 📋 Properties

	Name	Type
☐	Hero	Content
☐	Subheader	Content
☐	100x84Logo_Banner	Content
☐	200x70Logo_banner	Content
☐	300x250_Promo	Content
☐	70x70Logo_Banner	ntent
☐	Hero_No Hed	ntent
☐	Letter	ntent
☐	Story	ntent
☐	Story_2Col	ntent
☐	Story_No Button	ntent
☐	Story_No Image	ntent
☐	300x70logo_Banner	ntent
☐	Headline	ntent
☐	620x100_banner	ntent

STATION PROMOTION

300x250
Ad Unit

My Emails>>NPRDS Email Templates

My Contents>>NPRDS Content Blocks

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

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Portfolio: Images

Download any Lyris images and upload them to your SMC Portfolio if you want to use them in new emails
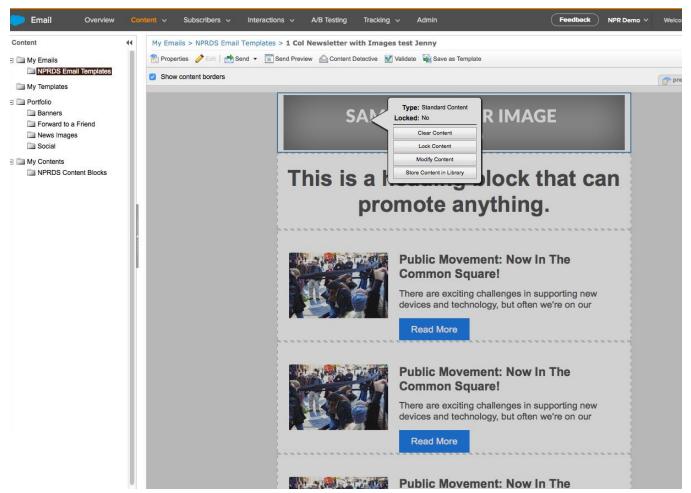
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SMC: Copy a NPRDS Email

- 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

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SMC: Edit NPRDS Email

■ Right-click on each block to MODIFY CONTENT

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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

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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?

Sara Terpeny – sterpeny@npr.org, (617)622-5413
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](#)

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