Salesforce Marketing Cloud
Training #2: List Management

February, 2016
Agenda

- About Data Extensions, Data Filters and Profile Pages
- Importing New Subscribers
- Creating a Data Filter (Segment)
- Sending to Data Extension or Filter
- Creating a internal test list and preview sends
- Next steps for switching
Getting Started: Profile Page & Data Extensions
Getting Started: Profile Page

Profile Page: Your users will subscribe and unsubscribe to your newsletters via your profile page.

If a user wants to subscribe to a newsletter, change their subscription to a different newsletter, or want to unsubscribe they must do so on the Profile page.

Your profile page is also connected to your Master Data Extension. Any changes made to the profile page will automatically be updated in SMC.
In SMC, a data extension is a table of your subscriber data.

To migrate your Lyris List we have:

1. Identified your **1 Master Lyris list** associated with your Newsletter Sign Up page.
   Email Subscriptions

2. Exported the active contacts from that list out of Lyris.

3. Imported that information into SMC as your **Master Subscriber Data Extension**.
Master Subscriber Data Extension: Station Subscribers, Master Data Extension = Pulse Newsletter list (and more... )

1) All active Lyris emails with newsletter subscriptions imported into this data extension.
2) Fields are tied to SMC profile page
3) We only mapped the newsletter titles/email fields for now
4) In SMC, a data extension is a table of your subscriber data
Getting Started: Master Subscriber Data

Sign up for newsletters here

First Name

Last Name

Email Address *

Email Subscriptions
- KWMU E-Update
- STL Pub Daily
- The Talk Studio

Contains 35,020 total records. Only the top 200 records are displayed.
One Time List Data Extension: A one time list of that is not linked to your Master Data Extension

Good to use one time list for:
- Internal Proof List
- Contest = A emails from contests on Facebook and have permission to email. You would import as a one-time list to send a thank you and notification of a winner.

Remember: direct them to your profile page.
Managing Your Data
Extensions
Use the **worksheet here** to update your Master Data Extension and create list of your segment logic to create new data filters in SMC
See attached xls file above of SMC fields that we can map for you

<table>
<thead>
<tr>
<th>NPRDS SMC Fields</th>
<th>Map to Lyris Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAYM_OrderStatus_str</td>
<td></td>
</tr>
<tr>
<td>PAYM_Method_str</td>
<td></td>
</tr>
<tr>
<td>PERS_FirstName_str</td>
<td>First Name</td>
</tr>
<tr>
<td>PERS_FullName_str</td>
<td></td>
</tr>
<tr>
<td>PERS_LastName_str</td>
<td>Last Name</td>
</tr>
<tr>
<td>PERS_MiddleName_str</td>
<td></td>
</tr>
<tr>
<td>PERS_Salutation_str</td>
<td>Letter Salutation</td>
</tr>
<tr>
<td>PERS_Suffix_str</td>
<td></td>
</tr>
<tr>
<td>PERS_SpouseFirstName_str</td>
<td></td>
</tr>
<tr>
<td>PERS_SpouseFullName_str</td>
<td></td>
</tr>
<tr>
<td>PERS_SpouseLastName_str</td>
<td></td>
</tr>
<tr>
<td>PERS_SpouseMiddleName_str</td>
<td></td>
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<tr>
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<td></td>
</tr>
<tr>
<td>PERS_SpouseSuffix_str</td>
<td></td>
</tr>
<tr>
<td>SFMC_DateAdded_dt</td>
<td></td>
</tr>
<tr>
<td>SFMC_mid_int</td>
<td></td>
</tr>
<tr>
<td>CUST_Upgrade_1</td>
<td>Upgrade 1</td>
</tr>
<tr>
<td>CUST_Upgrade_2</td>
<td>Upgrade 2</td>
</tr>
</tbody>
</table>

Map these SMC fields to my Lyris fields

Add these custom fields not in SMC fields
View and Export Your Master Sub Data Ext

Data Extensions > Master Subscriber Data

- Name: Station_Subscribers_Master_1
  - External Key: Station_Subscriber
  - Description: Master data extension schema for WXXI

Master Subscriber Data > Station_Subscribers_Master_1 Data

Contains 35,020 total records. Only the top 200 records are displayed.
How to Import
Admin >> Email >> Subscribers >> Data Extensions
Preparing Your File to Import

- When you export your list from Lyris, open it in Excel to confirm it is ready for importing:
  - Do a “find/replace” to look for commas. Remove any that are not needed
  - If a single field contains multiple items they should be separated by a standing pipe | instead of a comma:

<table>
<thead>
<tr>
<th>Newsletters</th>
<th>Wi</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-News</td>
<td></td>
</tr>
<tr>
<td>Jazz Insider</td>
<td></td>
</tr>
<tr>
<td>E-News</td>
<td></td>
</tr>
<tr>
<td>Jazz Insider</td>
<td></td>
</tr>
</tbody>
</table>

- Make note of which fields the file contains, and which SMC fields those fields map to
- Save the file as a .CSV
Import (browser method)

1. Select Data Ext and click on IMPORT
2. Select My Computer
3. Select file from desktop
4. Add and Update and NEXT
5. Map fields (each time in browser method)
6. Review and enter email address for notification of any import errors
7. Review import errors, fix file and re-import if need be

- You can import via FTP that doesn’t require you to map fields each time. Contact us for FTP info and [review more info on how to import](#)
Create a Test List (One-Time Lists)

- Subscribers >> Data Extensions >> One-Time Lists >> Create

1. For a test list, you can just create a new Data Extension (e.g. it won’t bring in all the fields of your master subscriber data ext)

2. Add name, description
3. Under Fields, type “email” and check PRIMARY KEY
4. Click on “Used for Sending” and email relates to subscription key
5. Add other fields (first name, etc) and SAVE
Create a One-Time List (Test Send List)

NPRDS Test List is an example

Check box for email as primary key
Managing Your Data Filters
SMC: Data Filters

**Data Filters:** Data Filter (SMC) = Segment (Lyris)

1) Data filters are set up for each of your Pulse newsletter titles so that you can send newsletters to your active users.

2) If you have other segments in Lyris, you need to recreate them in SMC.
List Management: Email >> Subscribers
Your Newsletter Data Filters

- Your Pulse/Lyris newsletter titles are already created as data filters so you can send
- Data filters are only compiled from your Master Subscriber data extension at the time of your send
- Review your segments in Lyris – do you need to import them all?
How to Create a Data Filter

Admin >> Email >> Subscribers >> Data Filters
Create a New Data Filter

Confirm field data is in Master Subscriber data extension
(Subscribers>>Data Extensions>>Master Subscriber Data>>Station Subscriber Master>>View Data

1. Go to Data Filters>>Create

2. Name your filter so you recognize it when sending

3. Choose Data Ext as your Data Source
   My Data Ext: Station_Subscribers_Master

4. This will populate your fields to select from

5. Choose the field of your segment and enter your value

6. Click Save
Data Filter Example: Current Members (step 1)

Check field in data extension and value (Current) is present.
Data Filter Example: Current Members (step 2)

- **Name (required)**: Current Members Filter
- **External Key**: 
- **Description**: A segment of our users who have a current member status

**Filter**
- **Data Source**: Station_Subscribers_Master_1
- **Outer Grouping**
  - MEMB_Status_str is equal to Current
- **Filter Text**: Return records where data extension values match "MEMB_Status_str" = "Current"
After building your Data Filter, click into it and click on CREATE DATA EXTENSION:
Preview your Data Filter

- Give your filtered data extension a name
- Open the DATE EXTENSIONS folder and highlight SUBSCRIBER AUDIENCES as the location to save your filter, then hit SAVE:
Preview your Data Filter

- **Refresh data filter – Rebuild with latest data**

- **Number of contact in data filter & last date data filter run**

Instructions in data filter behind this data extension
Data Extension vs. Data Filter

- Data Extension: Email List & including all imported fields

- Data Filter: Instructions for SMC – How to determine who belongs on a sub-list

- Subscriber Audience: A specialized data extension – the members of a given sub-list (like “generating” a segment in Lyris, you need to “refresh” to pull updated contacts into data extension)
How to Send Email >> Content >> My Emails
1. Select your email and under SEND>> Select Guided Send

2. Send to your data extensions for a full list send:

   Data Extensions>>Master Subscriber
   Data>>Station_Subscribers_Master

   One-time Lists>>NPRDS test send list

3. Or, send to a data filter (newsletters, etc)

   Data Filter>>Choose a filter
   OR
   Data Extensions>>Subscriber Audiences
Guided Send: To Your Full List (or Test List)
Guided Send to Data Filter (newsletters)
Sending: Guided Sends, Part 2

Ignore Choose Excludes andSuppressions *unless you’ve uploaded an outside unsub list

FROM Name is default. To add others, contact us and then you’ll find them under SEND CLASSIFICATION

Choose Suppress this send from reports (if only a test send)

Schedule send and REVIEW — “This Information is Correct” before you can send

Check your data extension and/or filters*

*Note: Filters will show 0 subscribers— they compile on send
Sending to a Data Filter vs. Subscriber Audience

- **Data Filter**: Instructions for SMC – How to determine who belongs on a sub-list

  When sending to a filter, filter is run once you hit send. No way to preview # of contacts before sending.

- **Filtered Data Extension (Subscriber Audience)**: A specialized data extension – the members of a given sub-list.

  Can preview # of contacts before sending. Must remember to refresh to pull in new contacts.
Test Lists and Send Preview

Admin >> Email >> Subscribers >> Data Extensions >> One-Time Lists
Get early access to a new email editor and other tools for email creation and content management.
### Homework

1. Read more about [importing](#) to update your master subscriber data file. Download the excel file to help you map fields you need from Lyris for segments to your SMC fields.

2. Review your segments in Lyris and determine what segments you need to recreate as data filters in SMC and what fields you need to import.

3. Export the NPRDS test list (one-time lists folder). Add your email, save your file as CSV and import this updated data extension file. Confirm that you receive a notification email from Salesforce with any import errors.

4. Send one of your emails via GUIDED SEND to the NPRDS test list data extension.

5. Create a data filter in SMC with one of your Lyris segments.

6. Contact NPRDS if you have any additional FROM names for us to add.
SMC: Support & Questions

Any Questions?

Sara Terpeny – sterpeny@npr.org, (617)622-5413
Janeen Williamson – jwilliamson@npr.org, (617)622-5443

More Learning Resources:

DS Review of Importing (and worksheet for Lyris info):
How to Update Your Master Subscriber Data Extension

Extra background from SMC:
Data Extension Import Wizard
Getting Started with Data Filters