



Salesforce Marketing Cloud Training #3: Reporting

February, 2016



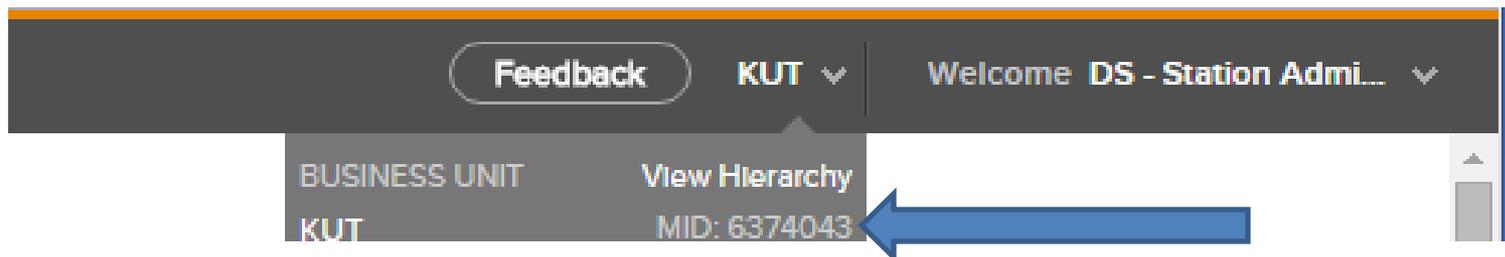
SMC Training #2: Reporting

- Profile Page
- Welcome Emails
- Personalization
- Reports – Subscriber Tracking
- Reports - Send tracking
 - List of sends and pending sends
 - Send detail (opens, clicks, etc.)
 - Export files from a send detail
 - Email reports
 - A/B tests
- Q&A

Profile Pages

- Profile pages are hosted on the et.npr.org domain at <http://pages.et.npr.org/cpc?bu=>
- You need to find your Salesforce Marketing Cloud ID number to add to the end of the URL.

Look for the MID by hovering over your account name in the top-right:



Profile Pages

- Review logo/banner (640 px max if not yet uploaded)
- Review newsletters listed. Are all still valid?
- Let us know if changes needed

Going Live:

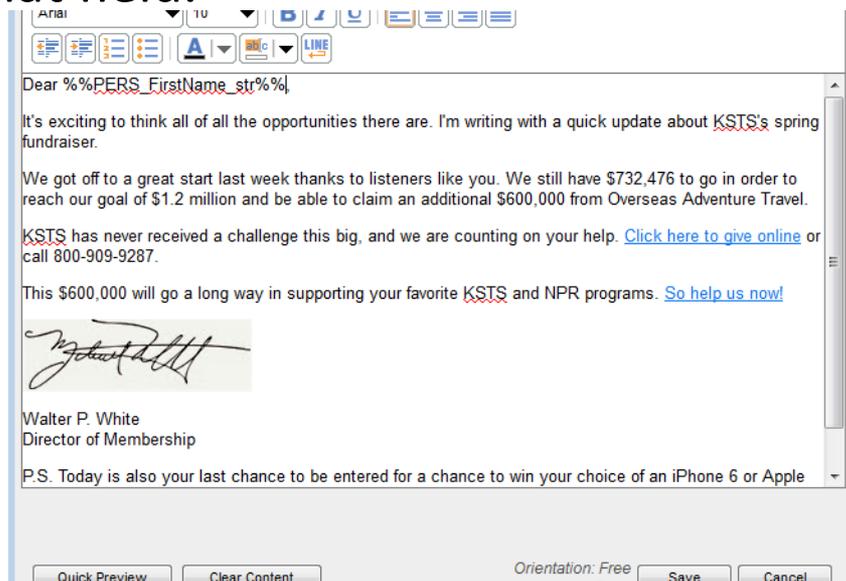
- You can link directly to your profile page from your website, or embed it on a page using an iframe.
- If using an iframe, add `&iframe=true` to the end of your profile page URL

Welcome Email

- Everyone who signs up via your profile page will automatically be sent a standard Welcome Email
- Go to EMAIL>>MY EMAILS>>NPR DS EMAIL TEMPLATES
- Click on the email named “DS Welcome Message Jan2016”
- Add your logo & edit text as needed.
- Keep welcome email in the NPR DS EMAIL TEMPLATES folder & do not change the internal name.

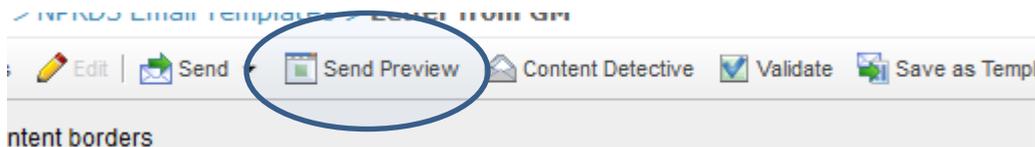
Personalization

- You can pull text into your email based on any information stored in your Data Extension
- Use the field header between four % symbols to instruct SMC to pull in personalized data:
 - Ex. First Name info is stored in the PERS_FirstName_str field
 - Enter %%PERS_FirstName_str%% in the text of your email to pull data from that field.

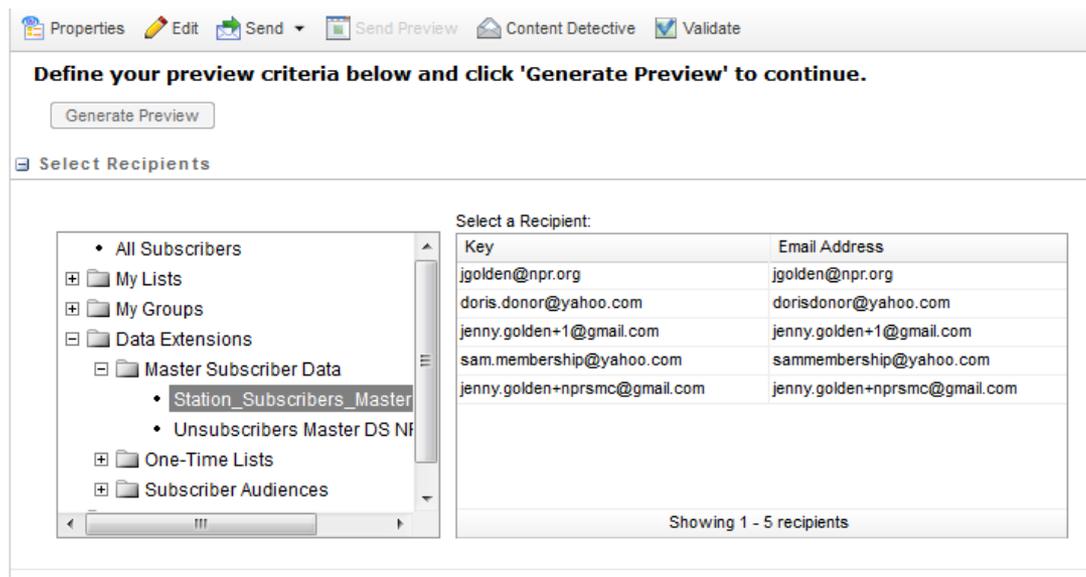


Previewing Personalization

- From the edit view of your email, select “Send Preview”

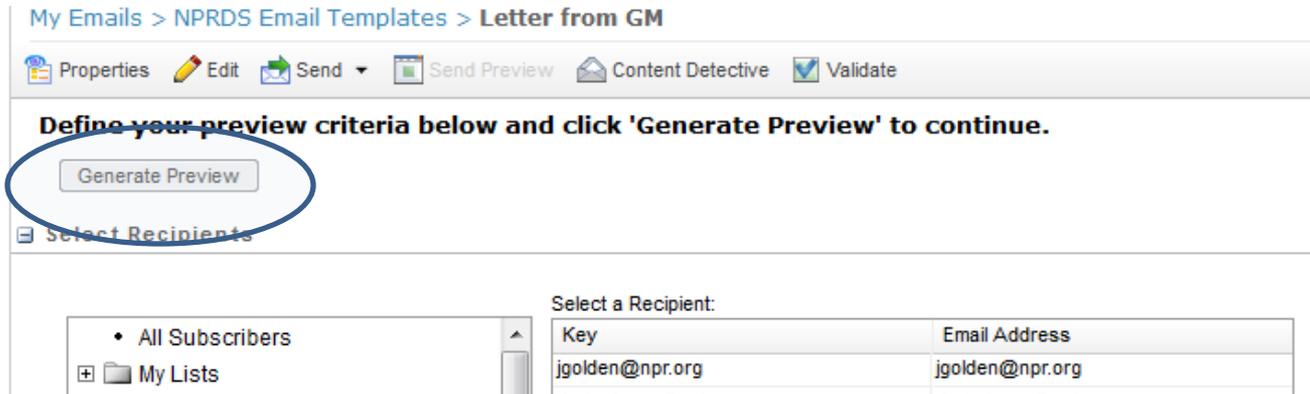


- In the box on the right, navigate to your data extension, then choose a contact to use as a sample on the left:



Previewing Personalization

- Click “Generate Preview” at the top:



- View a preview on screen. Click on “Test Send” to send yourself an email with that subscriber’s data in the content.

Reporting: Email >> Tracking

Email Overview Content Subscribers Interactions A/B Testing Tracking Admin Feedback NPR Demo Welcome DS - Station Adm

Tracking

- My Tracking
 - Test Send Emails
 - A/B Testing
- My Reports**
 - Report Status and History
 - Subscriber Reports
 - Attribute By Tracking Event
 - List Demographics
 - List Performance Over Time
 - List Size Over Time
 - Subscriber Engagement
 - Subscriber Most Recent Activity
 - Subscribers Not Sent To
 - Unengaged Subscribers for a List
 - Email Reports
 - Email Performance By Attribute
 - Email Performance by Domain
 - Email Performance by List
 - Email Performance for All Domains
 - Email Performance Over Time
 - Single Email Performance by Device
 - Tracking Reports
 - A-B Test Summary Report
 - Account Send Summary
 - Campaign Email Tracking Funnel
 - Email Send Performance by Device
 - Forwarding Activity Details
 - Microsite Tracking Report
 - Recent Email Sending Summary
 - Response Trend Analysis for Campaigns
 - Send Classification by Email
 - Spam Complaints Over Time
 - Triggered Sends Tracking
 - Custom Reports

My Reports

Subscriber Reports

-  [Attribute By Tracking Event](#)
This report allows you to see how your subscribers reacted to a certain email send, based on a specific tracking event and based on a particular attribute.
-  [List Demographics](#)
Analyze your lists to see breakdown of subscribers by status, domain and subscription tool.
- [List Performance Over Time](#)
Examine each of your lists to evaluate their effectiveness over time across multiple sends.
- [List Size Over Time](#)
This report tracks the number of subscribers on a list over a specified time period. The output of this report includes a table showing the number of subscribers by status for each month in the specified time period. This data is also provided in a line graph.
- [Subscriber Engagement](#)
This report provides subscriber-level detail on which subscribers are actively engaged with your email program.
- [Subscriber Most Recent Activity](#)
This report provides a list of all subscribers and details their most recent open or click activity.
- [Subscribers Not Sent To](#)
This report provides a list of subscribers who have not received an email during a specified date range.
- [Unengaged Subscribers for a List](#)
See which of your subscribers are unresponsive after multiple email campaigns. The 'List' you choose identifies the specific set of subscribers for whom Engagement will be calculated while contributors to their engagement arise from Sends from any List in which they reside. You may also include the subscriber's attributes to support any additional analyses relative to engagement.

Email Reports

-  [Email Performance By Attribute](#)
No Description Available
-  [Email Performance by Domain](#)
Evaluate email send results for each domain sent to for a single send.
- [Email Performance by List](#)
Assess response, bounce, and click through rate for each list or group sent to as part of a send event. (Excludes email sent to a single recipient.)
- [Email Performance for All Domains](#)
This report gives you the ability to see how a specific email send performed at each and every email domain you sent to, or to only the largest domains, or anywhere in between.
- [Email Performance Over Time](#)
Easily see how effective an email has been historically at driving results across multiple sends.
- [Single Email Performance by Device](#)

Tracking Reports

-  [A-B Test Summary Report](#)
A-B Test Summary Report
-  [Account Send Summary](#)
Send and all potential response counts/rates for an account organized by send. If an Enterprise or Agency account is specified, the results will also display their respective Lock & Publish, On Your Behalf, or Agency Client

Reporting>>Tracking>>Sends

Standard email reporting on every send:

- Opens
- Clicks
- Delivers

Email>>Overview to see past/pending sends

Or

Reporting>>Tracking>>Sends to see more detail on last 100 sends

Sends		Past	Pending
Oct 27 Blue Bag Special Offer for You SENT TO 24302 subscribers	SENT ON Tuesday, October 27, 2015 5:29 PM DELIVERED 99.6%		
RNOT Week 2-3 Member Alert: We were unable to process your Sustaining Membership this month SENT TO 232 subscribers	SENT ON Tuesday, October 27, 2015 4:44 PM DELIVERED 99.6%		
Sustainer Update Thank You Thank you for your support! SENT TO 111 subscribers	SENT ON Tuesday, October 27, 2015 2:43 PM DELIVERED 99.1%		
Sustainer Gift Thank You Thank you for your support! SENT TO 686 subscribers	SENT ON Tuesday, October 27, 2015 2:43 PM DELIVERED 99.3%		
Fulfilled Gift Thank You Thank you for your support! SENT TO 407 subscribers	SENT ON Tuesday, October 27, 2015 2:40 PM DELIVERED 99.5%		
Business Gift Thank You Thank you for your support! SENT TO	SENT ON Tuesday, October 27, 2015 2:39 PM		

Email Send Tracking Detail Page

Email
Feedback KUT Welcome DS - Station Adm...

Tracking

- My Tracking
 - Test Send Emails
 - A/B Testing
- My Reports
 - Report Status and History
 - Subscriber Reports
 - Attribute By Tracking Event
 - List Demographics
 - List Performance Over Time
 - List Size Over Time
 - Subscriber Engagement
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 - Email Reports
 - Email Performance By Attri
 - Email Performance by Don
 - Email Performance by List
 - Email Performance for All C
 - Email Performance Over Ti
 - Single Email Performance t
 - Tracking Reports
 - A-B Test Summary Report
 - Account Send Summary
 - Campaign Email Tracking F
 - Email Send Performance B
 - Forwarding Activity Details
 - Microsite Tracking Report
 - Recent Email Sending Sum
 - Response Trend Analysis f
 - Send Classification by Ema
 - Spam Complaints Over Tim
 - Triggered Sends Tracking
 - Custom Reports

My Tracking > Tracking Details

Select Recipients Export

Overview **Click Activity** Surveys Job Links

Summary

Job ID: 1065383
 Name: Oct 27
 Subject: Blue Bag Special Offer for You
 Date Sent: 10/27/2015 5:29 PM
 Total Sent: [24,302](#)
 Data Extensions: Fall 2015 Membership Drive Campaign (24302) sent (Using All Subscribers)(24302 sent)
 Excluded: Already Gave (1176 excluded)



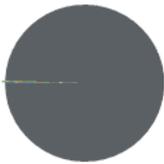
Inbox Activity

Viewing: Current Activity

	Total	Unique	
Opens	3,019	2,572	10.622%
Clicks	319	275	1.136%
Forwards	0	0	0%
Surveys	-	0	0%
Unsubscribes	-	6	0.025%

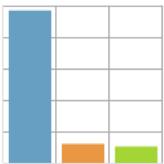
Send Performance

Delivery Rate: 99.642%



Total Bounces:	87
Hard Bounce:	49
Soft Bounce:	22
Block Bounce:	16
Delivered:	24,215

Open Performance



Open Rate: 10.622%

Delivered:	24,215
Total Opens:	3,019
Unique Opens:	2,572

Unengaged Subscribers

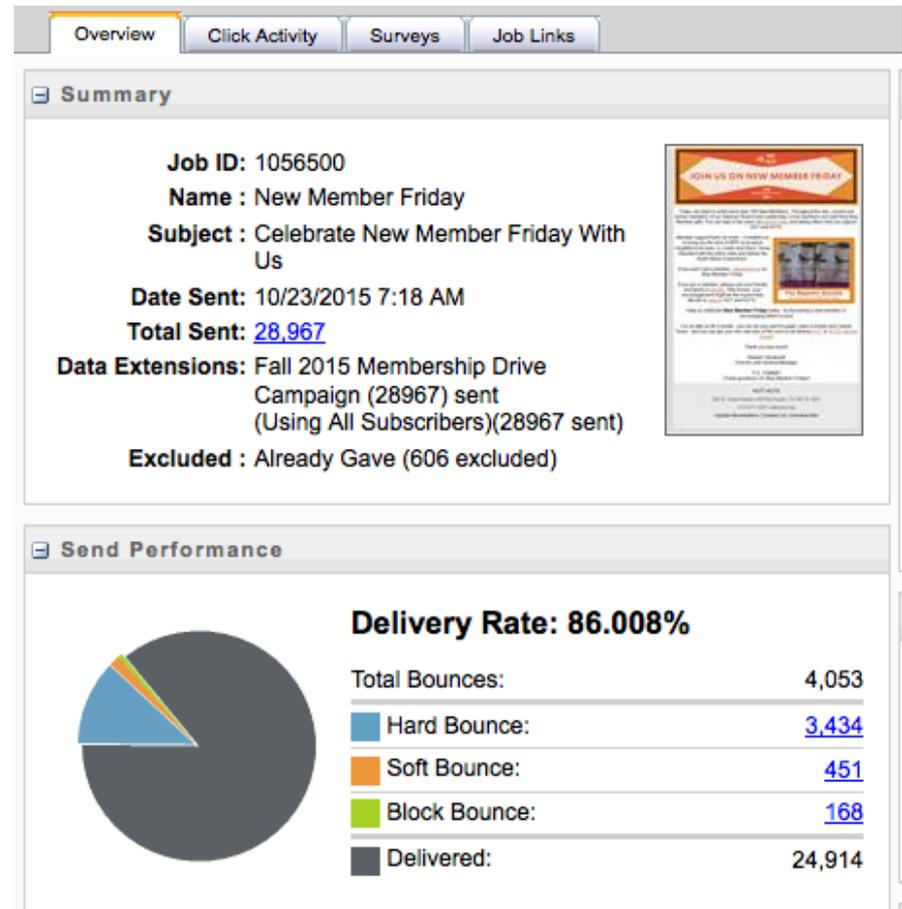
	Unique
Total Delivered	24215
Did not click	23,940
Did not open	21,643

Forward to a Friend Activity

	Total	Unique
Clicked 'Forward' link	0	0
Forward Activity	0	0
New Subscribers	0	0

Email Send Tracking Detail: Activity

- Job ID
 - Good to know for support
- Data Extension
 - Who did you send to
- Click Activity
 - Heatmap of links in email
- [Bounces](#) (read more)



Email Send Tracking Detail: Exports

View and export on each send detail:

- Did not click
- Did not open
- Delivered

Example...

Export out those who didn't open and create one-time data extension to send an email asking if they still want to receive your newsletters (include link to your Profile Page)

The screenshot displays an email tracking interface. On the left is a sidebar menu titled "Tracking" with a double-left arrow icon. The menu is organized into several categories:

- My Tracking**
 - Test Send Emails
 - A/B Testing
- My Reports**
 - Report Status and History
 - Subscriber Reports
 - Email Reports
 - Email Performance By Attribution
 - Email Performance by Domain
 - Email Performance by List
 - Email Performance for All Campaigns
 - Email Performance Over Time
 - Single Email Performance
 - Tracking Reports
 - A-B Test Summary Report
 - Account Send Summary
 - Campaign Email Tracking Funnel
 - Email Send Performance Breakdown
 - Forwarding Activity Details
 - Microsite Tracking Report
 - Recent Email Sending Summary
 - Response Trend Analysis for Campaigns
 - Send Classification by Email Type
 - Spam Complaints Over Time
 - Triggered Sends Tracking
 - Custom Reports

The main content area is titled "My Tracking > New Member Friday > Did not click". It features a toolbar with "Select Lists", "Search", "Export All", "View Properties", and "View History". Below the toolbar is a table with two columns: "Subscriber Key" and "Email". The table contains 20 rows of subscriber data, each with a checkbox in the first column.

<input type="checkbox"/>	Subscriber Key	Email
<input type="checkbox"/>	john.pillot@gmail.com	john.pillot@gmail.com
<input type="checkbox"/>	khayward@austin.rr.com	khayward@austin.rr.com
<input type="checkbox"/>	snfoster02@hotmail.com	snfoster02@hotmail.com
<input type="checkbox"/>	bernardnor@aol.com	bernardnor@aol.com
<input type="checkbox"/>	jeansynodinos@yahoo.com	jeansynodinos@yahoo.com
<input type="checkbox"/>	jim@jrcjr.com	jim@jrcjr.com
<input type="checkbox"/>	lxthogg@yahoo.com	lxthogg@yahoo.com
<input type="checkbox"/>	maggie.walsh@sbcglobal.net	maggie.walsh@sbcglobal.net
<input type="checkbox"/>	nfazekas@hotmail.com	nfazekas@hotmail.com
<input type="checkbox"/>	ocohen2@sbcglobal.net	ocohen2@sbcglobal.net
<input type="checkbox"/>	cpdemers@gmail.com	cpdemers@gmail.com
<input type="checkbox"/>	dawn.a.doyle@gmail.com	dawn.a.doyle@gmail.com
<input type="checkbox"/>	moel.rodriguez@yahoo.com	moel.rodriguez@yahoo.com
<input type="checkbox"/>	audreyd415@gmail.com	audreyd415@gmail.com
<input type="checkbox"/>	cgura@austin.rr.com	cgura@austin.rr.com
<input type="checkbox"/>	dmartin@donmartin.com	dmartin@donmartin.com
<input type="checkbox"/>	kim1224tx@gmail.com	kim1224tx@gmail.com
<input type="checkbox"/>	order@abersan.com	order@abersan.com
<input type="checkbox"/>	oxdeanxo@yahoo.com	oxdeanxo@yahoo.com
<input type="checkbox"/>	ellen@ncpr.org	ellen@ncpr.org
<input type="checkbox"/>	jbs@uwyo.edu	jbs@uwyo.edu
<input type="checkbox"/>	jburnett@ncpr.org	jburnett@ncpr.org
<input type="checkbox"/>	pwilke@ku.edu	pwilke@ku.edu
<input type="checkbox"/>	shabkar@gmail.com	shabkar@gmail.com
<input type="checkbox"/>	ariechas@yahoo.com	ariechas@yahoo.com

List Hygiene

- It's important to maintain strong list hygiene to help maintain a strong sender reputation.
- We recommend periodic purging of contacts who do not engage in emails:
 - Generate a filtered data extension based on subscribers who have not opened or clicked on links over several sends
 - Send email asking subscribers, do you still want to receive email? & link to your profile page to confirm.
 - For those who do not click on the link, add to your unsubscribed list.

Reporting: Email Delivery

Email reports to you or your team

Email>>Interactions>>Activities
>>Report

The screenshot displays the 'Email Interactions' reporting interface. The top navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', 'A/B Testing', 'Tracking', and 'Admin'. The left sidebar shows a tree view under 'Interactions' with 'Activities' expanded to 'Report'. The main content area is titled 'Reports > Report Details' and contains the following sections:

- Actions:** Save, Delete, Cancel
- Custom Date Range:** Selected. Previous Time Period is unselected.
- Start Date (required):** 9/28/2015 12:00 AM
- End Date (required):** 10/28/2015 11:59 PM
- Exclude Single Sends:** Yes (selected), No
- Time Zone (required):** (GMT-05:00) Eastern Time (US & Canada) *
- Culture Code (required):** English (United States)
- Report Results Delivery:** Save Report for FTP (unselected), Email the Report Results (selected)
- Email Address (required):** [Empty text field]
- Subject (required):** [Empty text field]
- Comments to Include in Email:** [Empty text area]
- Results File Format:** Data File (.csv) (selected), Data File UTF-8 (.csv), Excel Spreadsheet (.xls), Data File Shift_JIS (.csv), Web Archive (.mht), Adobe (.pdf), Excel spreadsheet (.xlsx), XML (.xml), Compressed CSV (.zip)
- Process Flow:** [Section header]

Coming Soon – Subscribes & Unsubscribes

- Salesforce is working on creating two custom reports for us:
 - Subscribes from profile page
 - Unsubscribes from profile page
- Ignore the subscriber reports that are currently in the system as they only pull from the enterprise view of all accounts.
- For now, you can see all your active subscribers by exporting your master subscriber data extension.

A/B Testing: Setup

Navigation: [Email](#) | [Overview](#) | [Content](#) | [Subscribers](#) | [Interactions](#) | **[A/B Testing](#)** | [Tracking](#) | [Admin](#) | [Feedback](#) | [KUT](#) | [Welcome DS - Jenny](#)

[Back to A/B Testing Overview](#)

1 **Test Management** | 2 Recipients | 3 Winner | 4 Send Management | [Cancel](#) | [Next](#)

Name: *

Description:

TEST TYPE

- Subject lines
- Emails**
- Content Areas
- From names
- Send dates/times
- Preheaders

Email A: [Change...](#)



Email B: [Change...](#)



Use one subject line | Use two subject lines

Choose a subject line to apply to both emails:

- Welcome to KUT!
- Welcome New Newsletter Subscriber
-

Use one preheader | Use two preheaders

Choose a preheader to apply to both emails:

- Confirmation of your KUT Newsletter subscription
- Thanks for subscribing to receive news from us
-

A/B Test: In Progress

[Email](#)
[Overview](#)
[Content](#)
[Subscribers](#)
[Interactions](#)
[A/B Testing](#)
[Tracking](#)
[Admin](#)
[Feedback](#)
[Digital Services](#)
Welcome DS - Jenny Golden

[Back to A/B Testing Overview](#)

Training test

Status: Canceled

Results Oct 28, 2015, 8:30 AM (GMT-05:00) Eastern Time (US & Canada) * Current

	Condition A Small Image Email	Condition B Test subject	Remainder	Total
OPEN RATE	--	--	--	--
UNIQUE CTR	--	--	--	--
DELIVERY RATE	--	--	--	--
UNSUBSCRIBE RATE	--	--	--	--
SUBSCRIBERS	--	--	--	--

Test Canceled

Details

TEST TYPE: Subject

EMAIL A SUBJECT LINE: Small Image Email

EMAIL B SUBJECT LINE: Test subject

PREHEADER: Preheader: Check out our...

FROM NAME: NPR
jgolden@npr.org

DETERMINE WINNER BY: Most Unique Opens

WINNER: No winner declared yet

RECIPIENTS: [View](#)

TESTS SENT: A: 0 (0.00%) subscribers
B: 0 (0.00%) subscribers

NEXT SEND: Test Canceled

Original Email Details

Adam's second email

CREATED Dec 12, 2014, 10:47 AM

MODIFIED Dec 12, 2014, 10:55 AM

Your Migration Cycle

- Complete your field mapping spreadsheet
- Finish setting up emails & filtered data extensions
- Review your profile page
- Review & customize your Welcome email
- Start sending from SMC! ***Goal: Start sending week of Feb. 22nd.***

SMC: Support & Questions

- Any Questions?

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

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

Learning Resources from SMC:

[All Reports \(some n/a\)](#)

[A/B Testing](#)

[Deliverability and Bounces](#)

[Conversion Tracking \(advanced\)](#)

Filtered Data Extensions

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