

# Getting Started: Email Studio: Building, Testing and Sending Email

Accelerator Webinar

Presenter Name, Title of Presenter   email@salesforce.com. @twitterhandle

 This webinar will begin at 1:05 pm EDT

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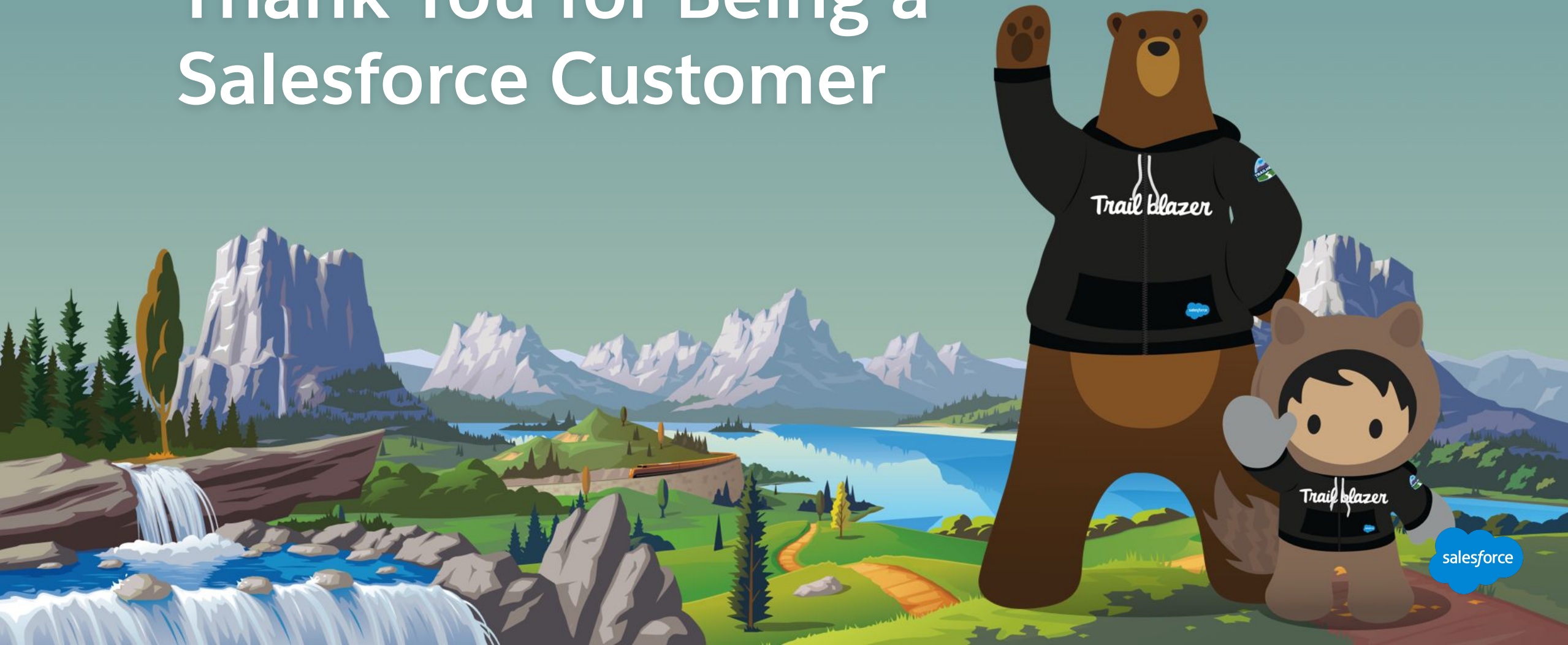
Premier Plan Customers  
Don't forget to request  
your 1:1 session  
follow-up in the survey  
after this call.

# Welcome to this Accelerator Webinar!

In this two hour session, we'll give you an overview of how build, test and send emails in Email Studio, to get started using Marketing Cloud, so you can get the most out of your Salesforce investment.



# Thank You for Being a Salesforce Customer





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# Agenda

## Accelerator Webinar

- **Overview**  
What challenge are we solving for you?
- **Understanding Data in Marketing Cloud**  
Learn the benefits and best practices of Data Extensions.
- **Uploading Content**  
Learn about importing content in Marketing Cloud.
- **Working with Templates**  
Learn how to use and build flexible shells to streamline email creation.
- **Creating Content Blocks**  
Learn how to create reusable content in Content Builder.
- **Building an Email**  
Learn and walk through features available to build an email in Content Builder.
- **Preview & Testing Emails**  
Learn and walk through features available in Marketing Cloud to preview and test your email.
- **Sending Emails**  
Learn and walk through features available in Marketing Cloud to send your email.
- **Next Steps & Resources**  
Learn about other resources and Accelerators to continue your progress.

## Overview

What challenge are we solving for you?

### What you can Expect from this Accelerator:

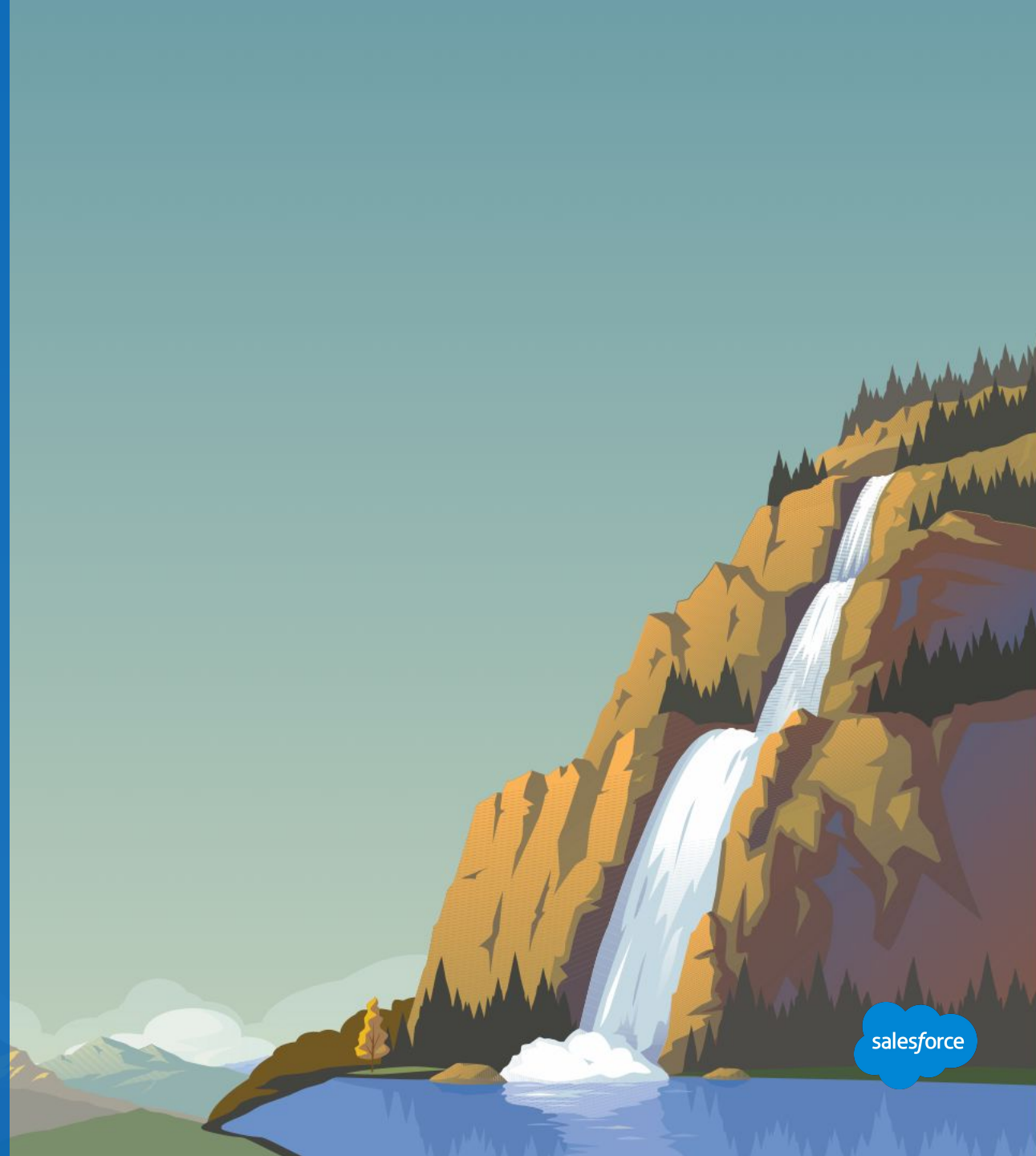
- Understand the basics of Email Studio & Content Builder to build, test and send emails.
- Walk through how to upload content, work with templates, create content blocks, and then build, test and send email.
- Learn best practices to build, test and send email.



## Build, Test and Send Workflow



# Uploading Content





## DIRECTIONS HOW TO USE THIS SECTION

Many slides in this delivery are simply the outline for discussion.

This Accelerator will walk customers through the basics of building and sending email.

You will be jumping back and forth between slides and demos in this accelerator.

When you see the yellow **“Walk with Me”** banner, we suggest you demo the capabilities outlined directly in your account and encourage customers to follow along in their accounts.

## Content Builder

One place to store, search, edit and personalize content

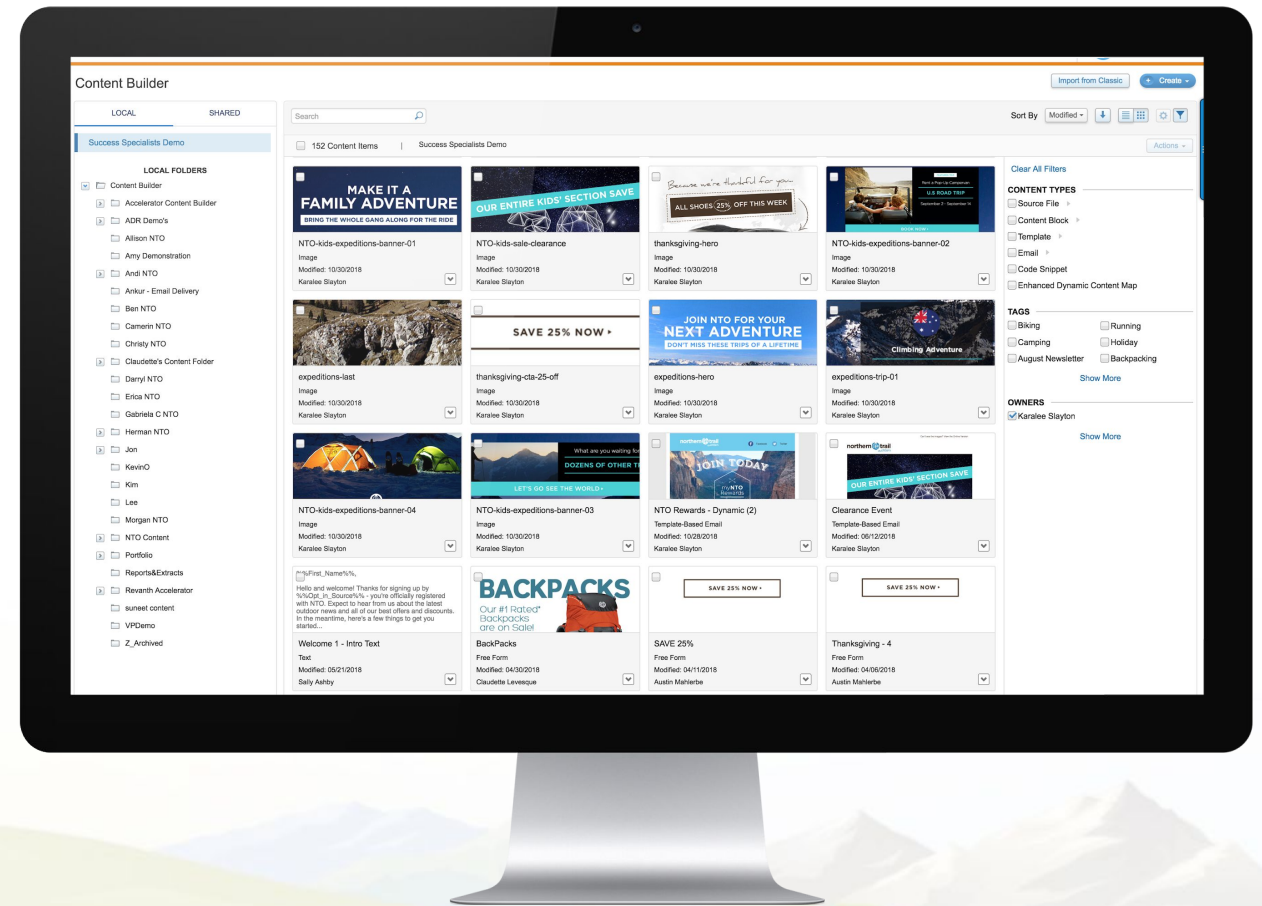
**Consolidate** images, content blocks, templates and emails in a single location.

**Visualize** your content in a thumbnail view.

Manage search and sort all of your content with filters and tags.

**Store and share** preapproved assets and templates to quickly build engaging emails.

**Seamlessly integrate** content across channels (currently Email Studio and Web Studio, with other channels planned).



## Uploading Content

Create or upload content from anywhere

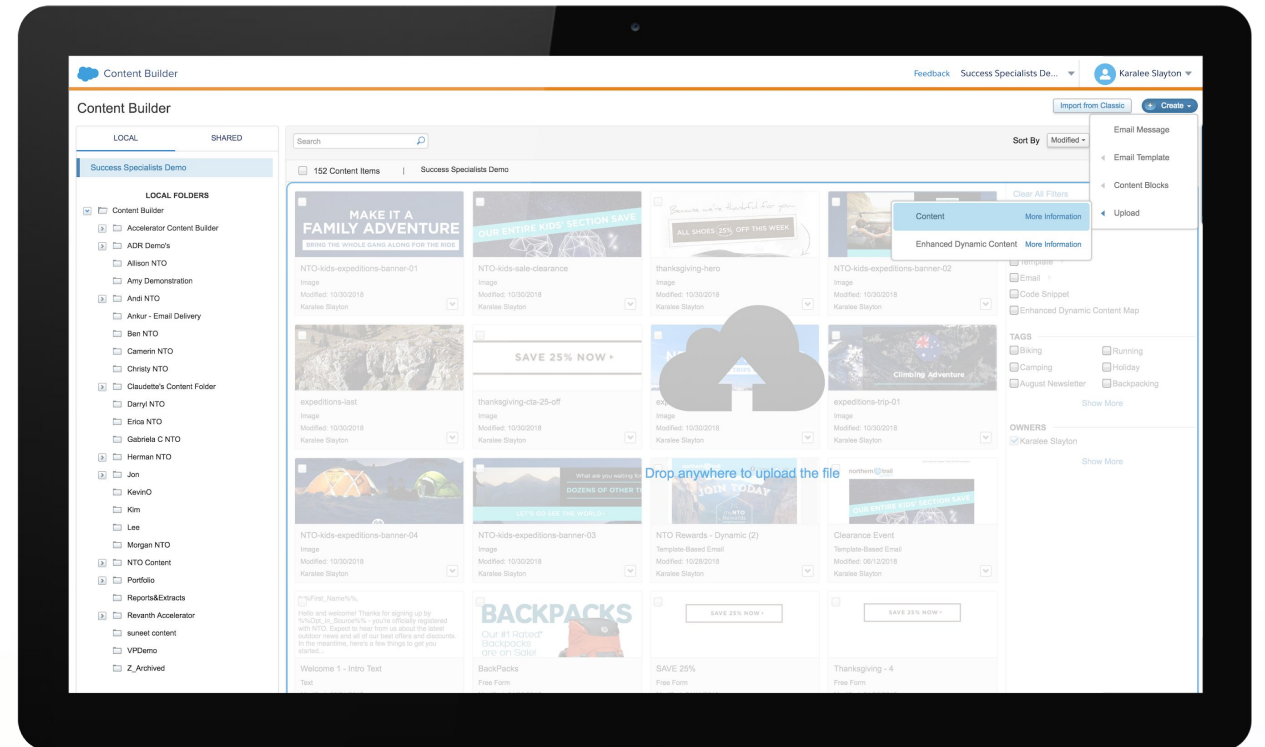
Drag and drop items straight from your desktop.

New content will be created in the selected folder.

Browse and upload from your document files.

Easily import content located in the Classic Content tools into Content Builder.

Drag and drop directly into an email during creation.



[Learn how to "Add & Import Content"](#)



## Organizing Your Content

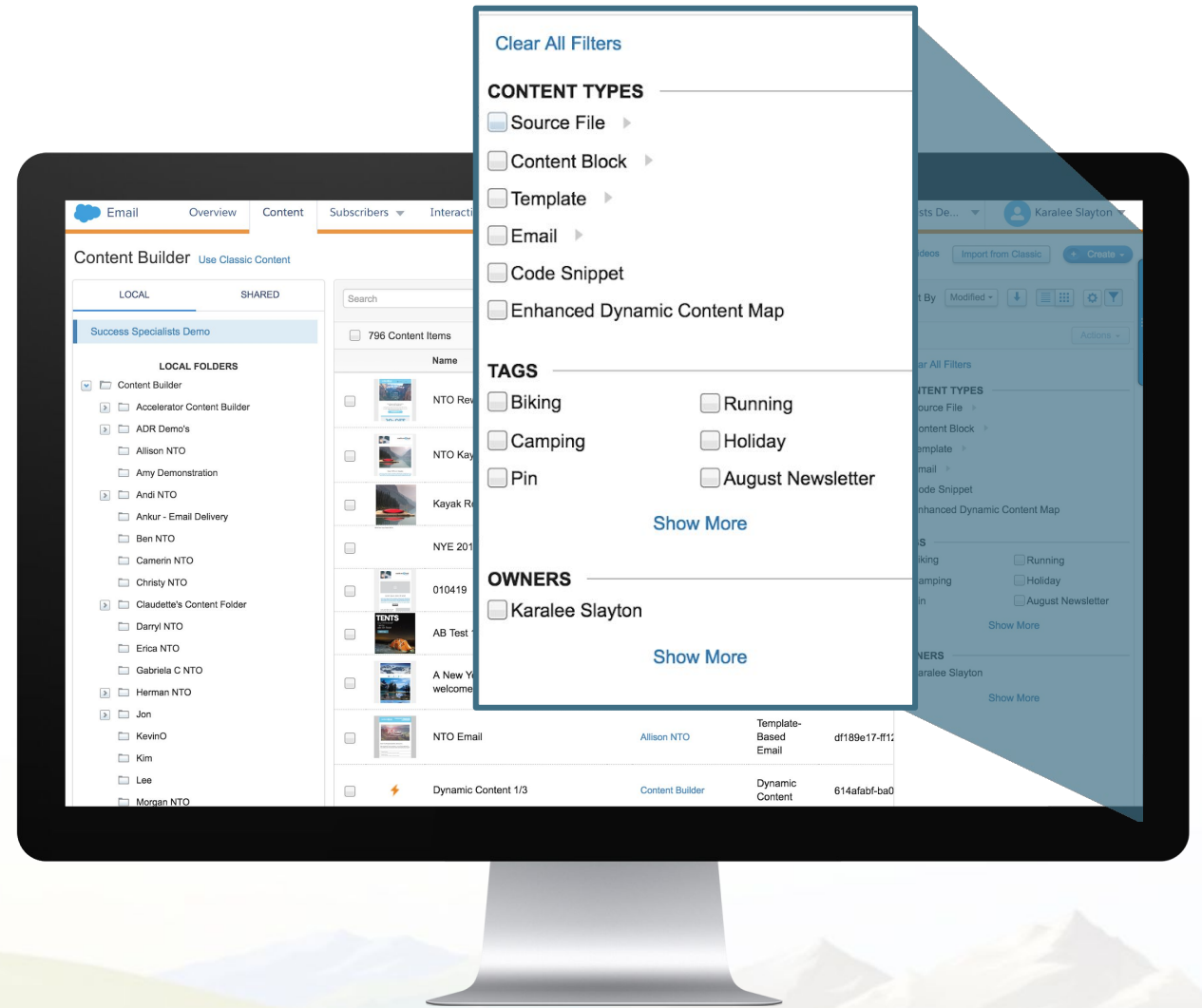
Find your content quickly and easily

### Content Builder features that will help you organize your content:

- Unified folder structure
- Powerful search engine
- Global search and tagging

### Search across all content, including images, emails, and templates

- Advanced sorting options
- Filter by content types, tags, or owner
- Group and individual content actions
- Right click to easily edit, delete, move, and more



[Learn how to "Organize Your Content"](#)

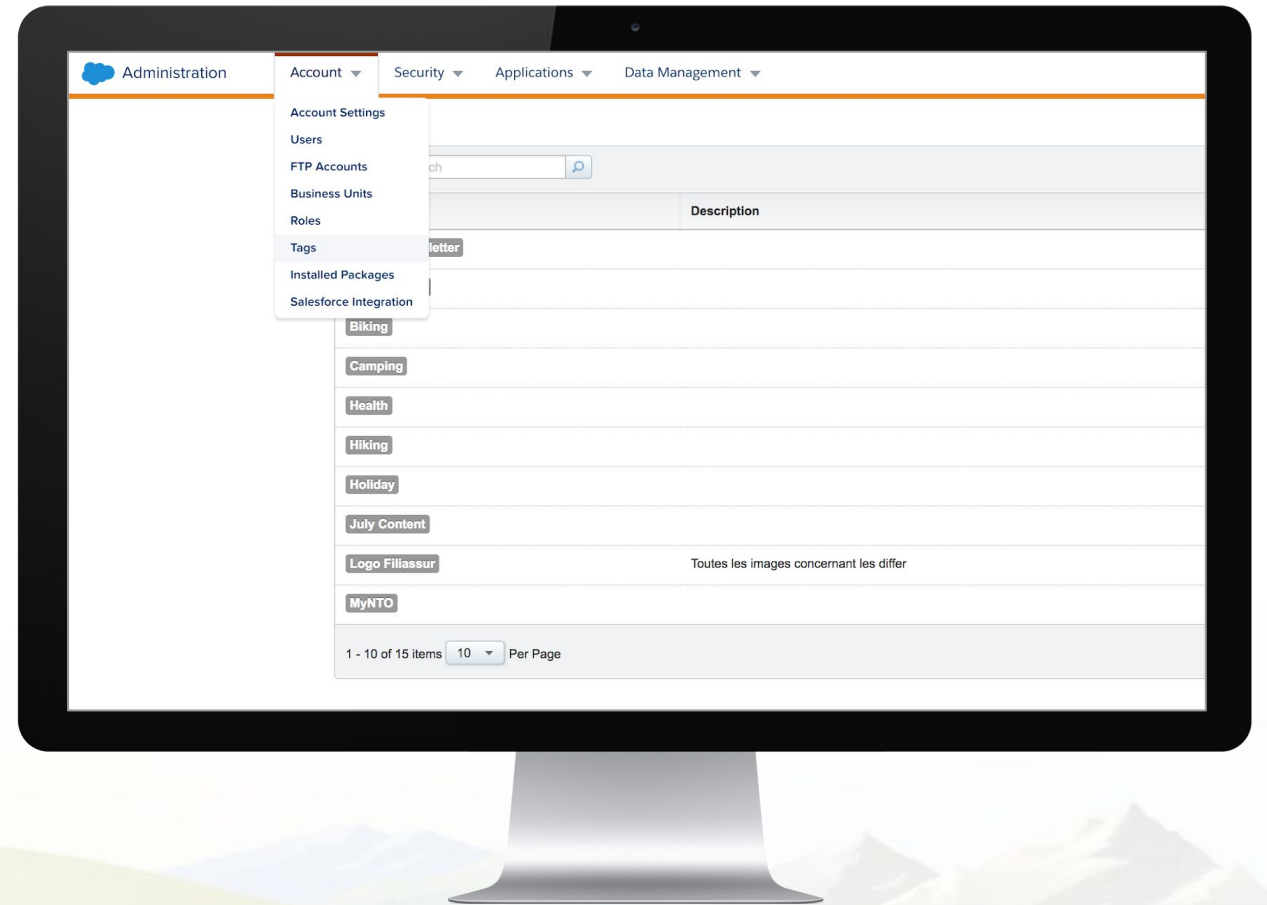
## Creating Your Tag Dictionary

### Administrative considerations

**Tag words needs to be created in the Tag dictionary before users can tag content.**

To access your dictionary, go to:  
Administration > Account > Tags

You can also set permissions as to who can create new Tag terms in the dictionary in the Permissions section.

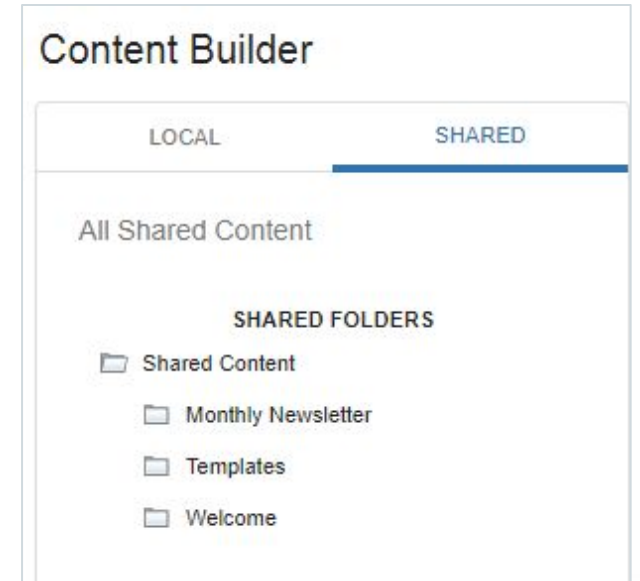
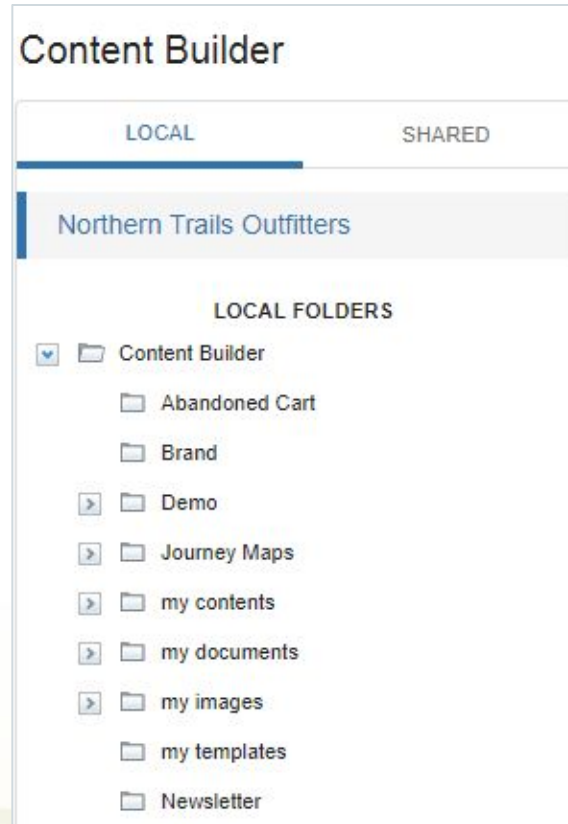


## Content Builder

### Content Best Practices

Consider how you want to create your folder structure **before** starting to upload content.

- Create folder structure based on Campaigns, Content Types, Date or anything that provides structure.
- Think cross-channel.
- Optimize your content for search.
  - Alphabetical order - numbers come first
  - Use Z for test emails to sort at bottom of the list
  - Use zzz Archive for old unused content
- Create Tags in Administration to better search
- Only upload content as you need it.



# Live Demo - Uploading Content



# Uploading Content

## Demo Outline

Upload via drag & drop or button.

Import Content link.

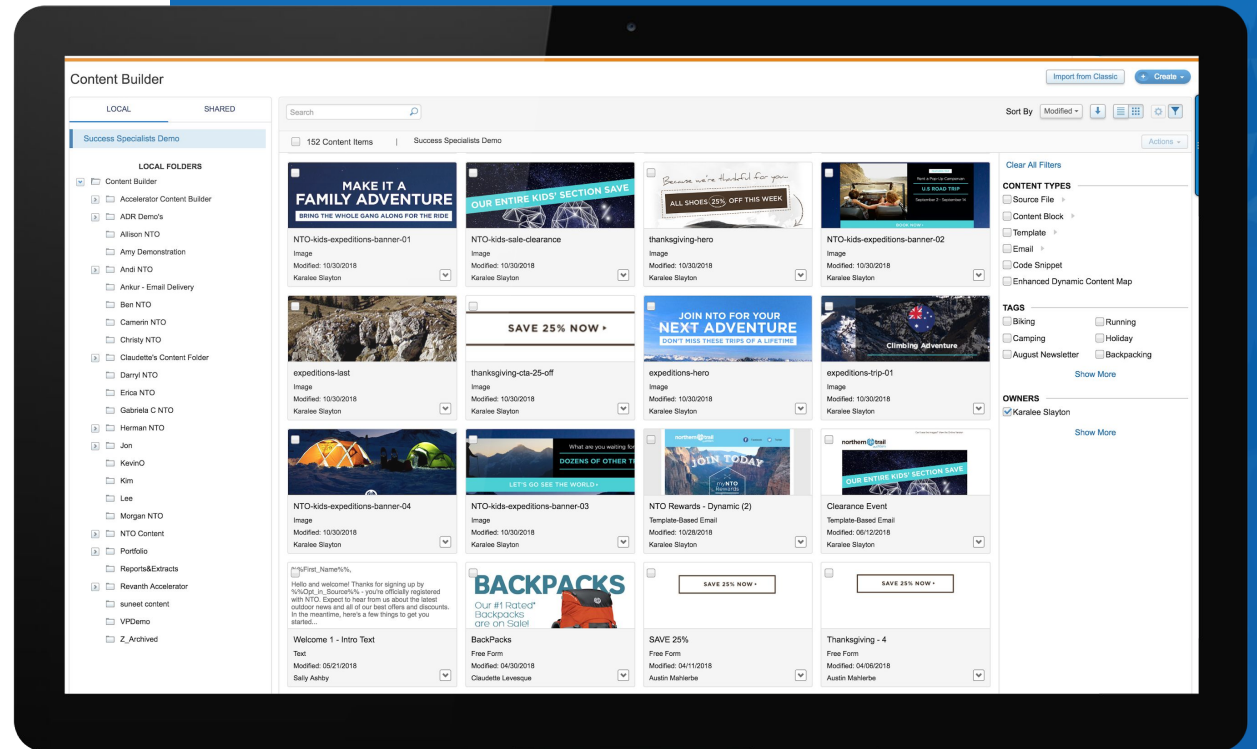
Toggle between list view and image view.

Organization- store images, templates and emails all in one folder.

Tags and Filters to easily find content.

- Show Admin where to setup tag dictionary

Edit, Delete, Move, etc.





# Working with Templates



## Content Editor

Intuitive drag-and-drop interface

**A unified email creation experience to create, edit, and test emails in one simple workflow.**

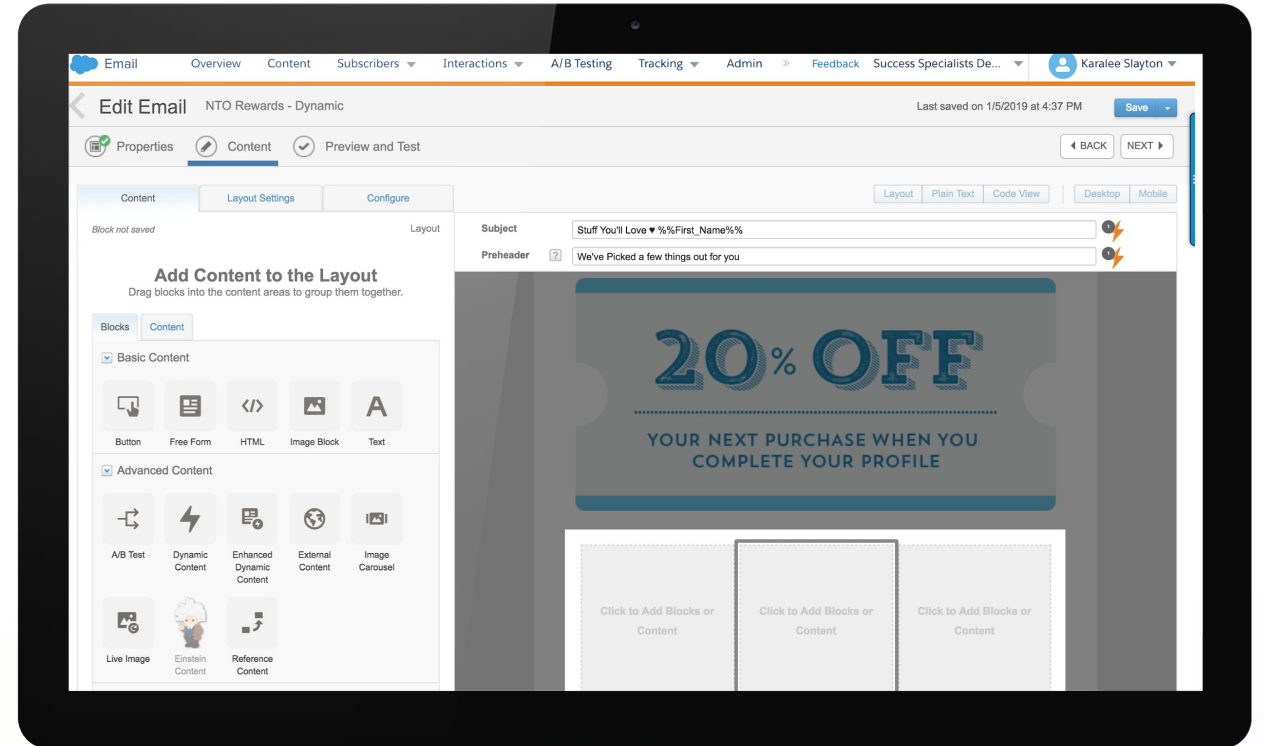
Build and preview emails and templates in real time with an always-present preview.

Create professional emails without knowing HTML.

Easily create content with WYSIWYG editing by using blocks and layouts.

Stack multiple blocks, layouts, and custom content in a defined content areas.

Insert references to common links such as Social Sharing, Forward to a Friend, and Open Tracking.



[Learn more about how to Create an Email in Content Builder](#)

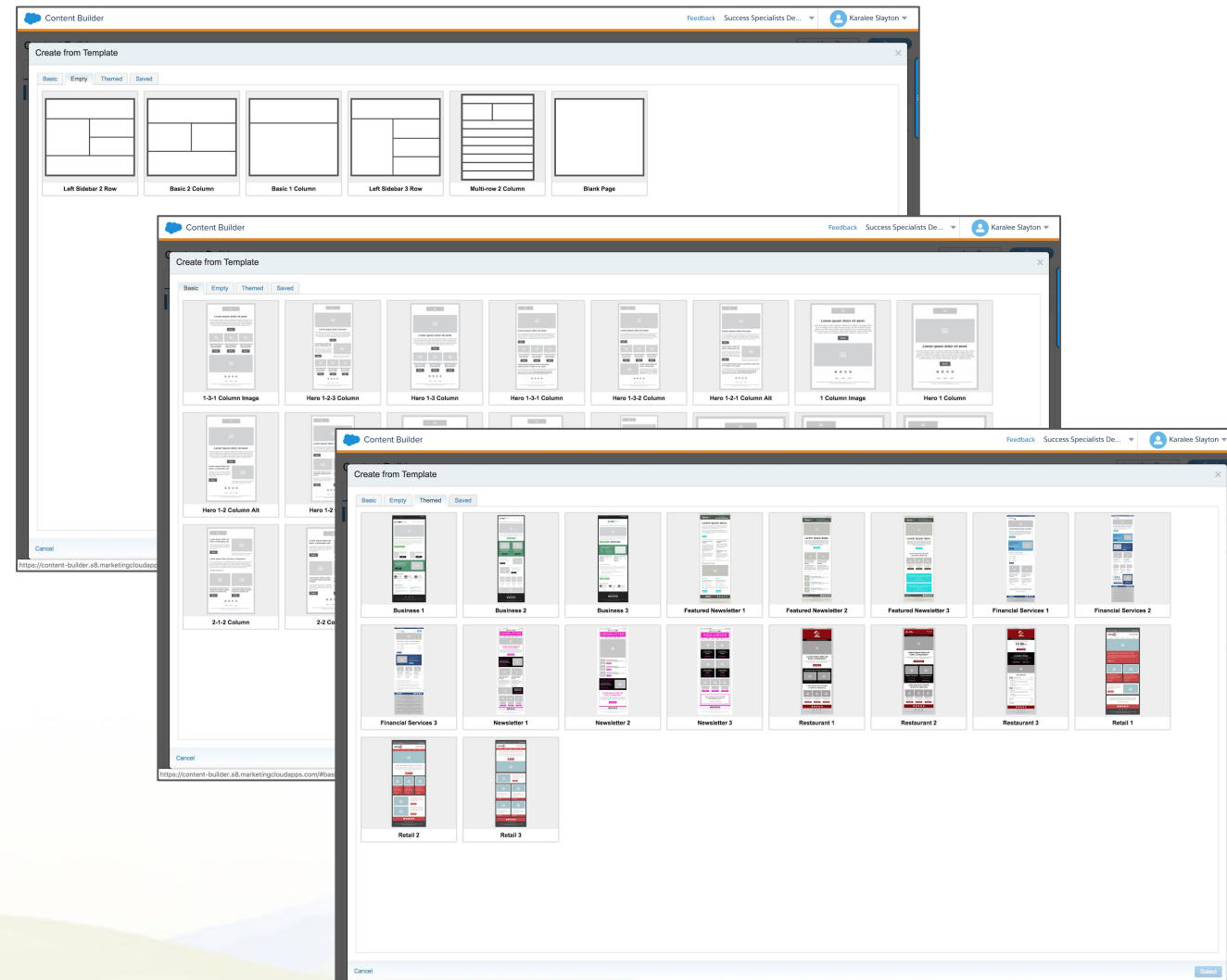


## Template Options

Out-of-the-box responsive templates

Three types of default templates, that look great on mobile devices are available:

- Six empty templates: Based on the most commonly used Classic content templates.
- 20 basic templates: Editable blocks and layouts for content structure.
- 18 themed templates: Styled and editable blocks and layouts for content structure.
- Or create templates from your existing emails.



See how to [“Create a Template”](#)

## Content Layout

Empty or predefined content areas

**Change layouts** on the fly by simply dragging and dropping a layout group of blocks onto the canvas.

**Add layout styling** just like content blocks, including border, colors, and spacing.

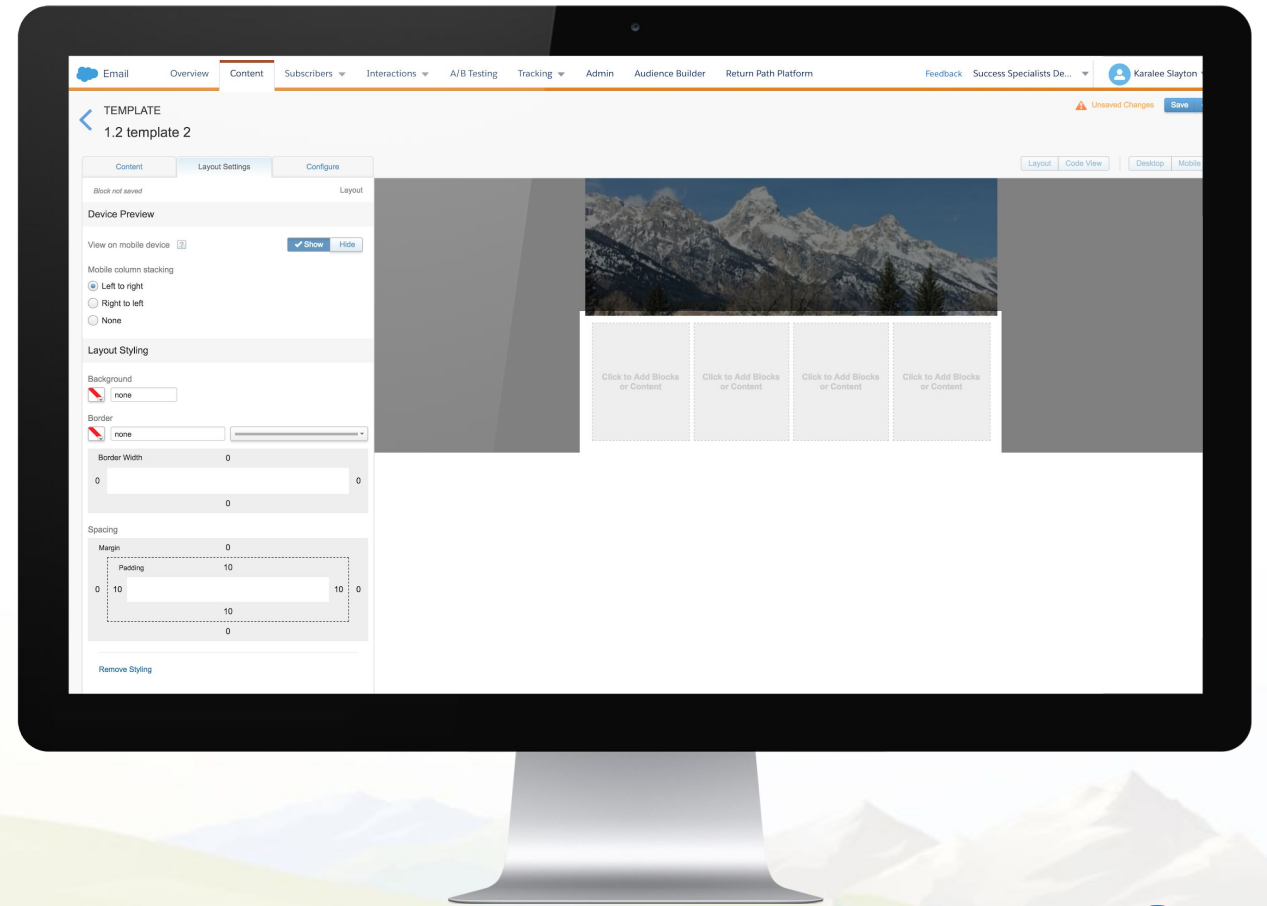
**Configure or adjust** the predefined layout for your specific needs.

**Limit** the number of blocks a user can drop into a content area.

**Add any content or restrict** the type of content allowed in a content area.

**Edit default instruction** labels to content areas.

**Lock a content** area to prevent editing.



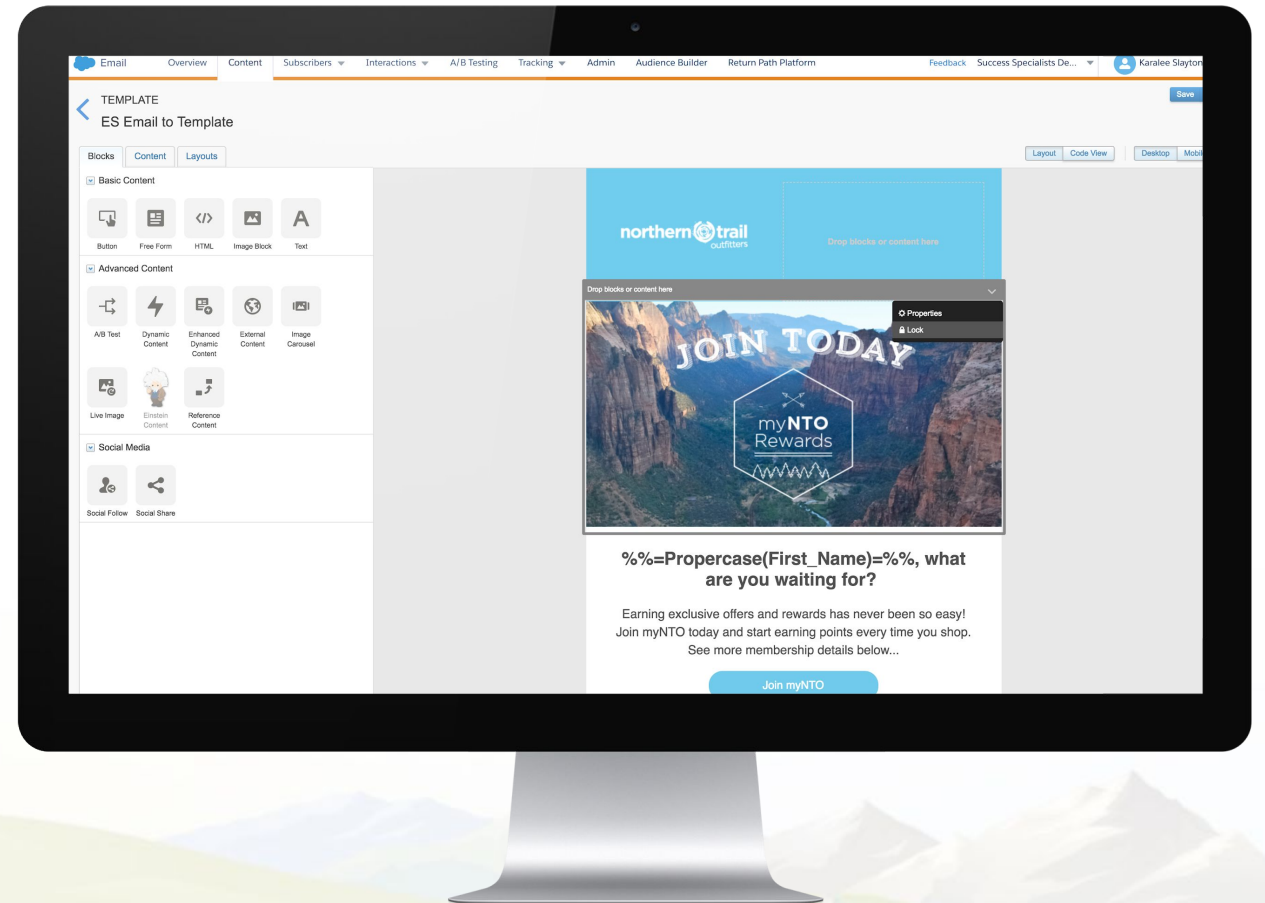
## Locking Content in Templates and Emails

Provide more Enterprise control

Content can be locked in emails (previously only available for templates) before sharing with business units.

Emails shared with locked content areas enable users of recipient business units to only edit unlocked areas.

Content areas can be unlocked by the recipient business unit if they duplicate the email.



## Content Builder

### Template Best Practices

**Default templates streamline processes and are built to look great on all devices.**

**Templates are flexible and can have restrictions.**

- Adjust content areas as needed.
- Add as many blocks to a content area as you want.
- Limit the number and type of blocks that can be dropped in a content area.
- Lock a content area so it cannot be changed in emails created using that template.
- Edit the default “drop blocks or content here” message in each content area to allow the template creator to include instructions in each content area.
- Add the header, footer, and open tracking tags to templates if you want them added to emails.

**Use Global Styles to easily change styles in one location and cascade those styles throughout the template or email. Global styles are only present on emails and templates based on one of the provided templates.**

# Live Demo - Templates

Selecting a template and adjusting content blocks



## Using Templates

### Demo Outline

#### Select a template

- Choose from Basic, Empty, Themed, or Saved Templates.

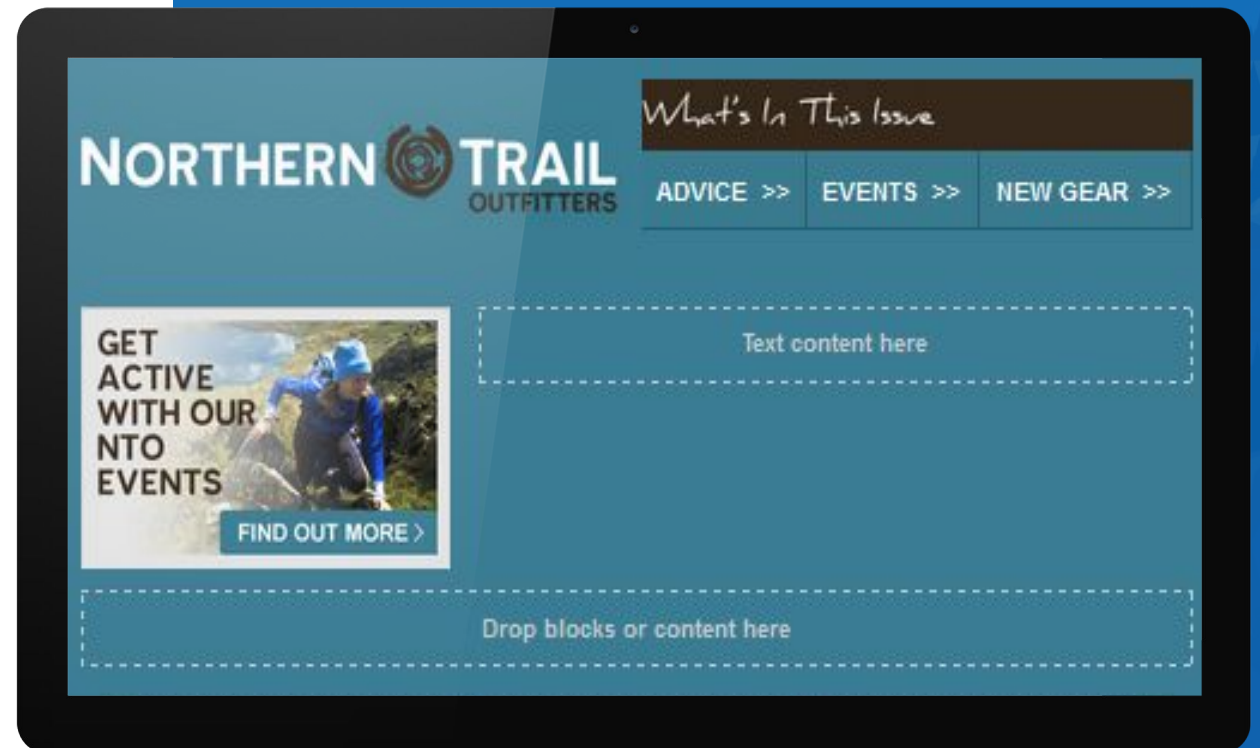
#### Make styling changes:

- Background color
- Border
- Padding
- Margin
- Mobile device display options
- Removal of divider lines

Populate the template with content and lock the content.

Designate particular content areas to contain certain types of content.

[Learn how to “Add & Import Content”](#)





# Creating Content Blocks



## Content Blocks: Basic Content

Easily build and modify content

You can create reusable content to easily drag and drop into layouts. You can also reuse content across campaigns. Other features include:

**Add block styling:** This can include border, colors, and spacing.

**Button:** Easily create standard buttons with button text and a URL to link.

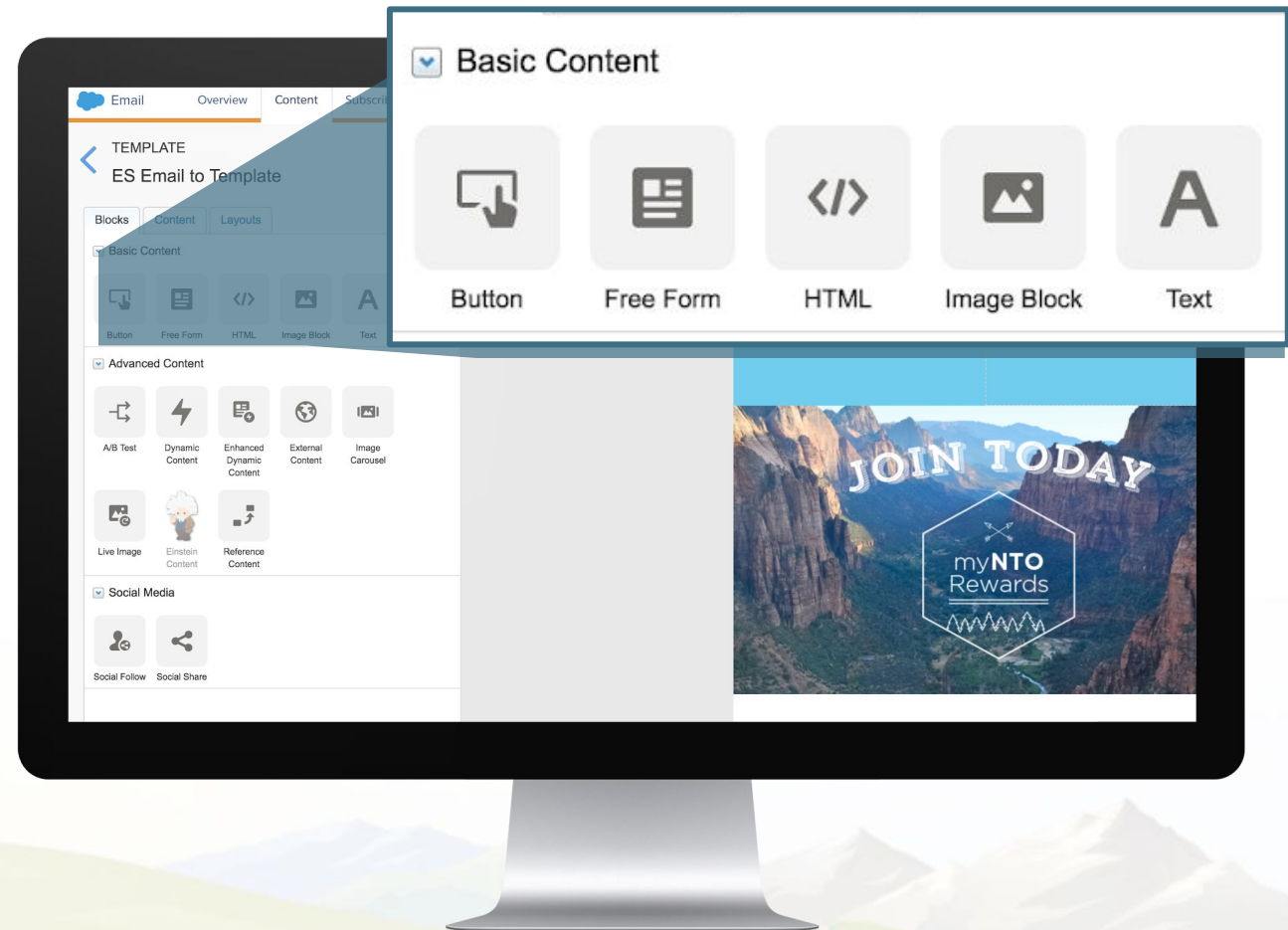
**Free form:** Add text, tables, links, and more.

**HTML:** Edit or modify HTML directly in a block to add indentation or spacing code snippets – this is accessible through a drop-down menu.

**Image:** Use existing images, drag and drop, or browse to select images from your computer.

**Text:** Type content to reuse.

[Learn how to “Create Content Blocks”](#)



## Content Blocks: Advanced Content and Social Media

Drive customers to your ever-changing content

**A/B Testing:** Create content blocks for testing, and track which perform better across emails.

**Dynamic content:** Include content based on data in a data extension.

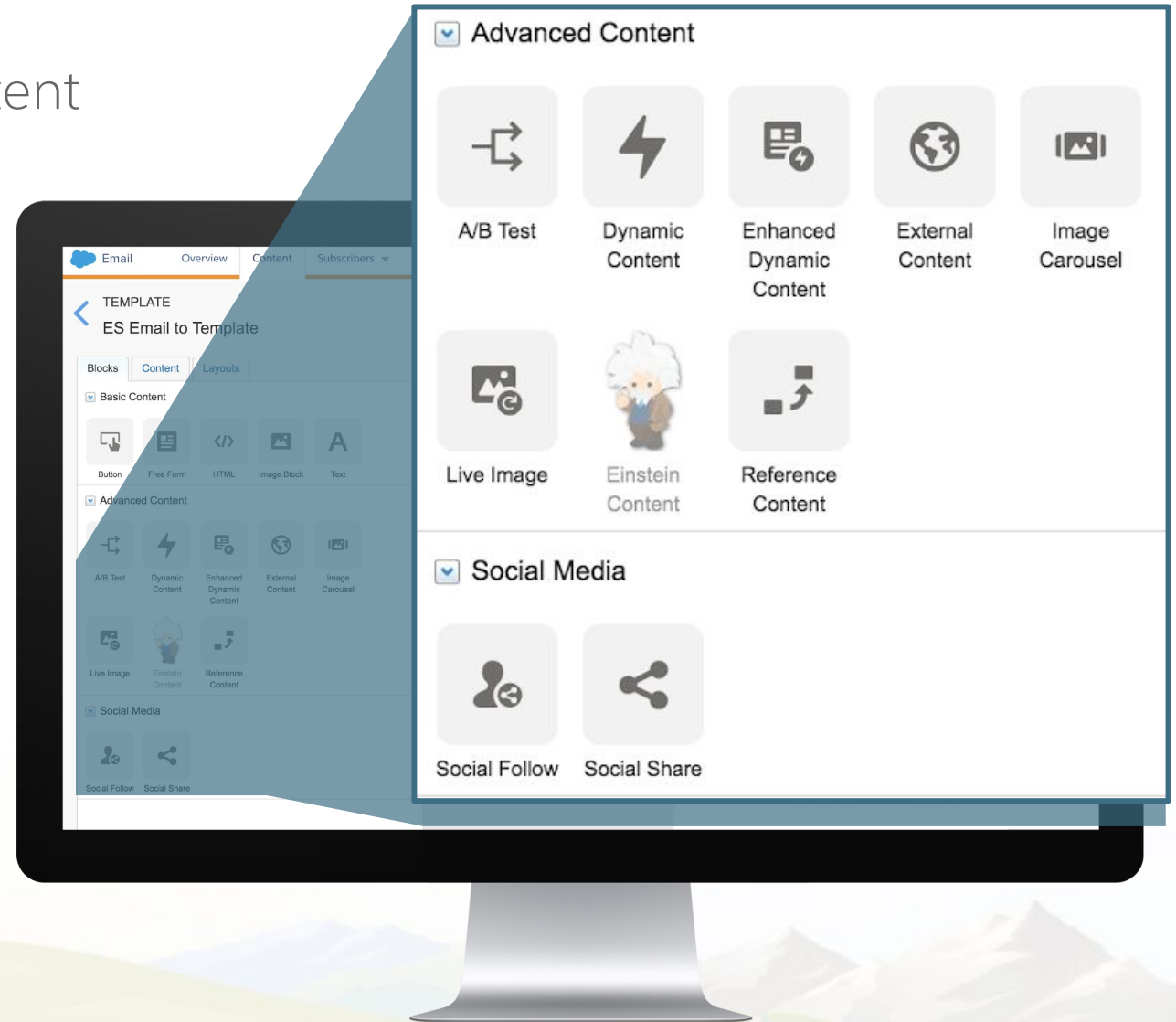
**External content:** Embed external content into a message using a URL.

**Predictive content:** Select personalized content based on subscriber attributes, behaviors, and rules.

**Reference block:** Allow users to insert a “pointer” to an existing content block in a template or email.

Note: This previously required AMPscript.

**Social Media:** Social Follow and Social Share allow recipients to share an email on their preferred social network.



## Content Builder

### Content Blocks Best Practices

Use Content Blocks to create reusable modular content for messages.

- You can create Content Blocks in Content Builder and while building an email.
- A content block or content layout created while editing an email or template can be saved for reuse.
- Think cross channel, branding control and efficiency.

#### Remember Organization

- Use consistency in naming conventions.
- Utilize folder structure and tagging to locate content easily.

#### Consider privileges

- Some users may only need access to certain content.
- Some users may only creating content, not building and sending emails.

When using the Scale to Fit option on images, resize your image to the maximum width and height to avoid image distortion.

HTML code pasted from Word can cause formatting changes that affect your email preview. To prevent formatting problems, use Paste from Word to paste from Notepad or Word Document.

# Live Demo - Content Blocks

Selecting a template and adjusting content blocks



## Using Content Blocks

### Demo Outline

Content Blocks can be created within Content Canvas or directly in your email as you are creating the email.

#### Create Content Block.

- Adjust Vertical Split.

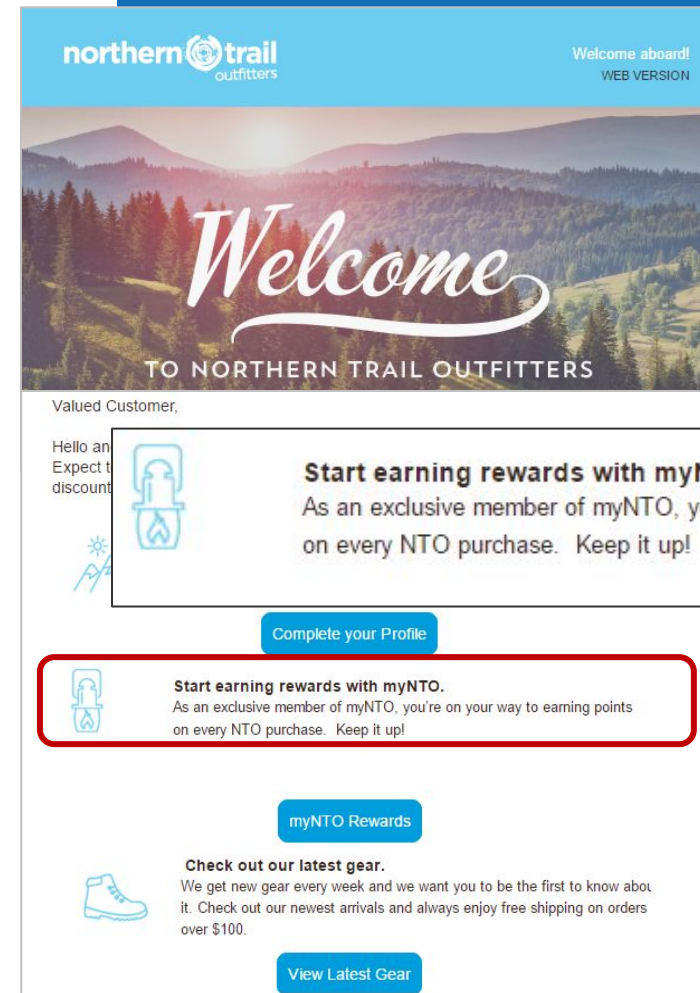
#### Create a Text Block.

- Edit font and size.

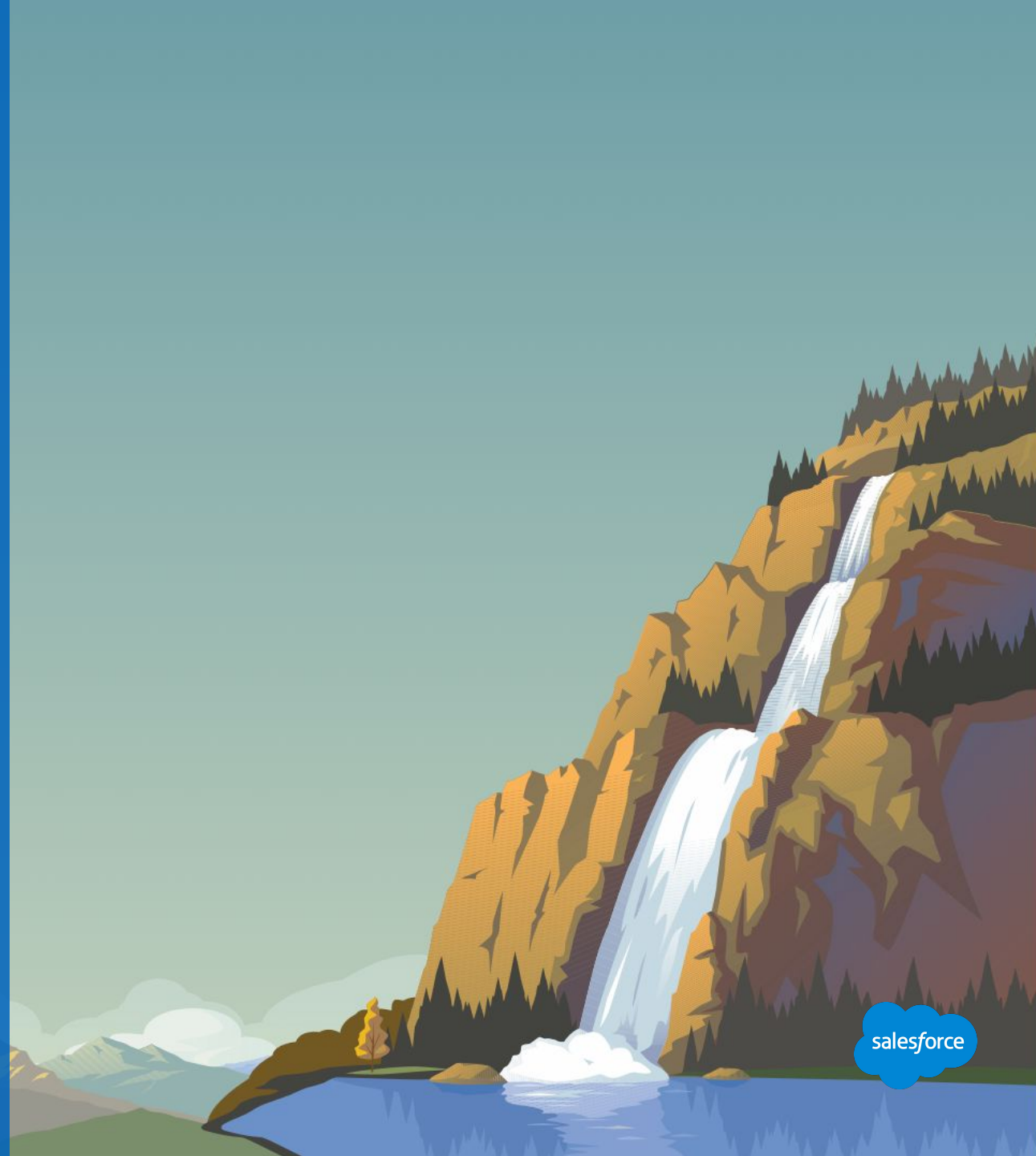
#### Create Image Block.

- Scale to fit.

[Learn how to “Create Content Blocks”](#)



# Building an Email



## Content Editor

Intuitive drag-and-drop interface

**A unified email creation experience to create, edit, and test emails in one simple workflow.**

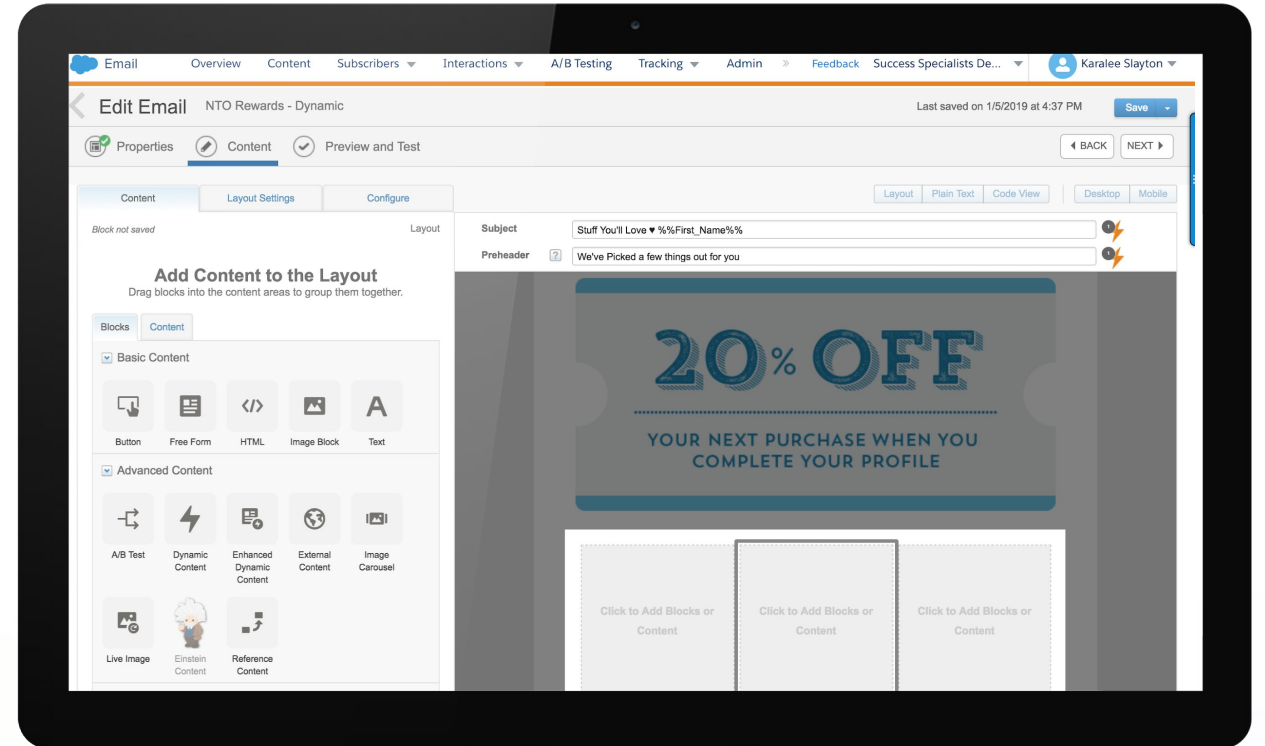
Build and preview emails and templates in real time with an always-present preview.

Create professional emails without knowing HTML.

Easily create content with WYSIWYG editing by using blocks and layouts.

Stack multiple blocks, layouts, and custom content in a defined content areas.

Insert references to common links such as Social Sharing, Forward to a Friend, and Open Tracking.



[Learn more about how to Create an Email in Content Builder](#)



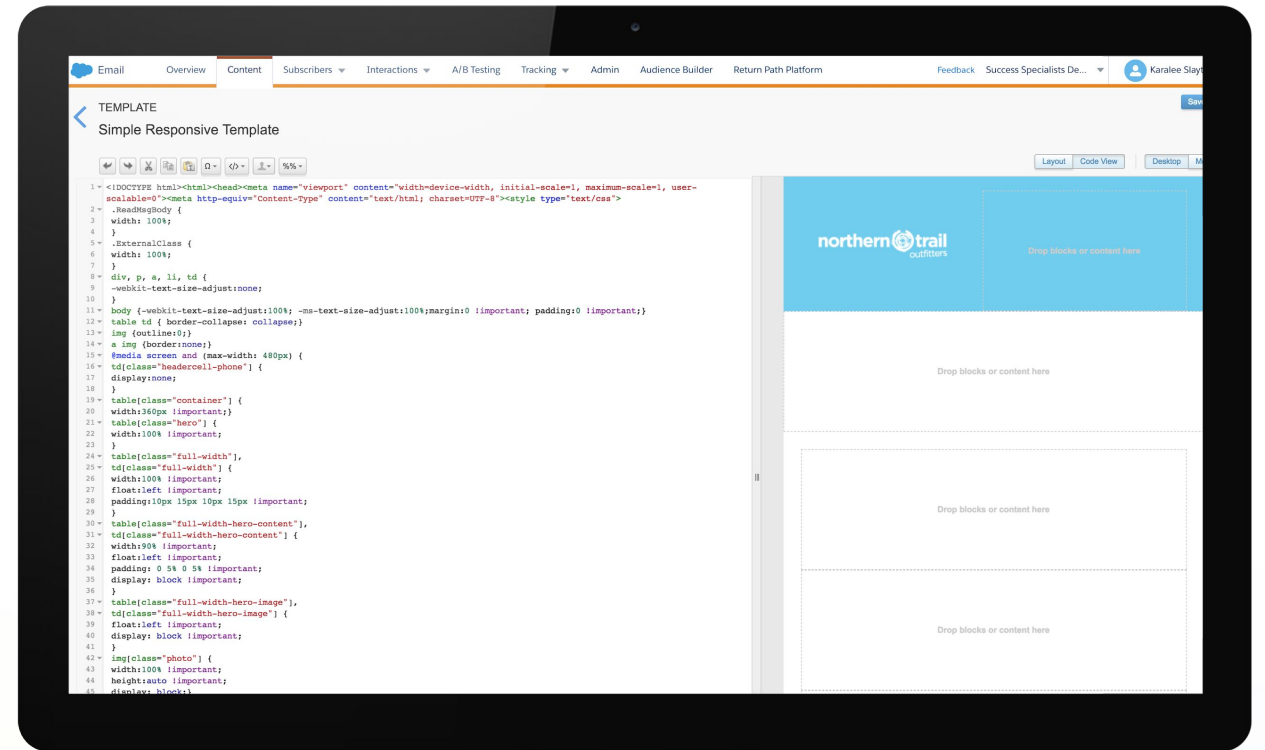


## HTML Editor

Create HTML paste emails

When editing an HTML source, user-friendly features include:

- Auto-complete of HTML
- Tag matching
- Color coding
- Line numbers
- Automatic formatting
- Persistent preview
- Preview and testing



## Creating Dynamic Content

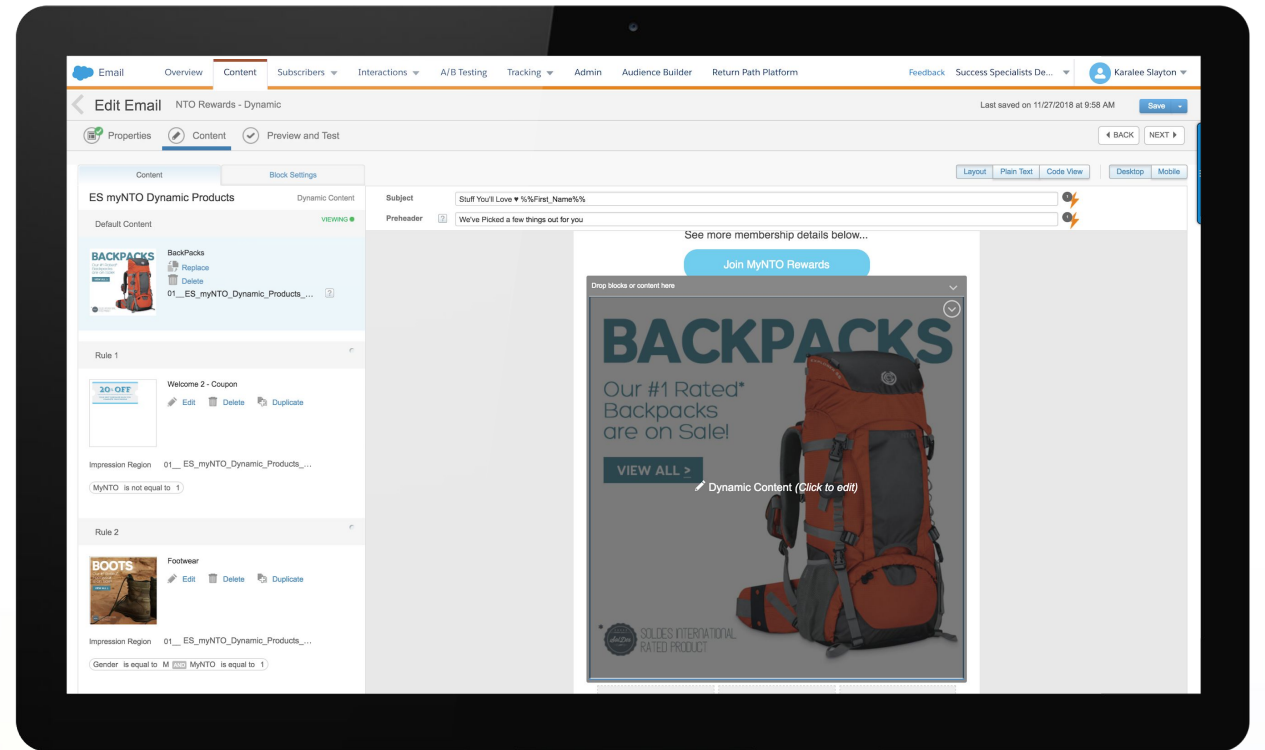
Personalizing emails at scale

Send specific content to a subscriber based on the data in a data extension.

Individualized content will display based on the rules that you create.

Design multiple, personalized versions of the same send.

Rules can be very simple or very complex, depending on your needs.



## Content Builder

### Email Creation Best Practices

A live, persistent preview on the right side of the page updates as changes are made, whether in Layout view or Code View.

You can save an email as a template for future use.

Use templates as a starting point for a simplified email creation process, especially for content that is repetitive.

Use any of these options to create or modify emails with similar content:

- Create an email from a template.
- Create from existing email.
- Duplicate then rename the email.

Once blocks are on the canvas, you can drag them to another location in the email or template.

Drag multiple blocks to any content area unless the content area is restricted.

A content block or content layout created while editing an email or template can be saved to Content Builder for reuse.

## Four Ways to Create Email

### Best Practices

#### Template

Use this option to create a new email from an existing template.

Template must be created first.

Choose from Basic, Empty, Themed or Save Templates.

Decide on banner, borders, and background.

No technical experience needed.

#### Paste HTML

Use this option to paste in HTML for your message body.

Generally HTML is created in an outside editor and pasted into the email application.

Add standard template elements in your code.

Flexibility and freedom in your design, as you have no restrictions with your layout.

Must know how to write HTML.

#### Text Only

Use this option to create a text only email.

No HTML will be created or sent, regardless of the subscriber's preference.

#### Existing Email

Use this option to create an email from an prior email.

# Live Demo - Building and Email



## Building an Email

### Demo Outline

Select Create Email.

Select your template.

Drag and drop your Content Blocks.

- Images
- Buttons

Adjust and format Content Blocks as needed.

Scale Image Blocks as needed.

Lock Content Blocks.

Show Paste HTML and Code Snippets

[Learn how to “Create Content Blocks”](#)

The screenshot displays the email builder interface for Northern Trail Outfitters. At the top left is the logo, and at the top right is a link to "View the Online Version". The main area is a grid of content blocks:

- Header:** A large hero image with the text "Welcome TO NORTHERN TRAIL OUTFITTERS".
- Text Block:** A personalized greeting: "Roberto, Hello and welcome! Thanks for signing up by social - you're officially registered with NTO. Expect to hear from us about the latest outdoor news and all of our best offers and discounts. In the meantime, here's a few things to get you started..."
- Image and Text Block:** An icon of a mountain and sun, followed by the text: "Let's get to know each other. Take a minute to fill out your profile and communications preferences so we can send you the most relevant and timely offers and discounts." Below this is a "Complete Your Profile" button.
- Image and Text Block:** An icon of a myNTO card, followed by the text: "Join myNTO for exclusive discounts. Exclusive offers and rewards have never been so easy! Join myNTO and start earning points on every purchase." Below this is a "myNTO Rewards" button.
- Image and Text Block:** An icon of a boot, followed by the text: "Check out our latest gear. We get new gear every week, and we want you to be the first to know about it. Check out our newest arrivals and always enjoy free shipping on orders over \$100." Below this is a "View the latest NTO gear" button.
- Footer:** A banner with the text "GEAR UP for Fall" and a "SHOP FALL" button.

Walk With Me

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# Preview and Testing Emails



## Preview and Testing

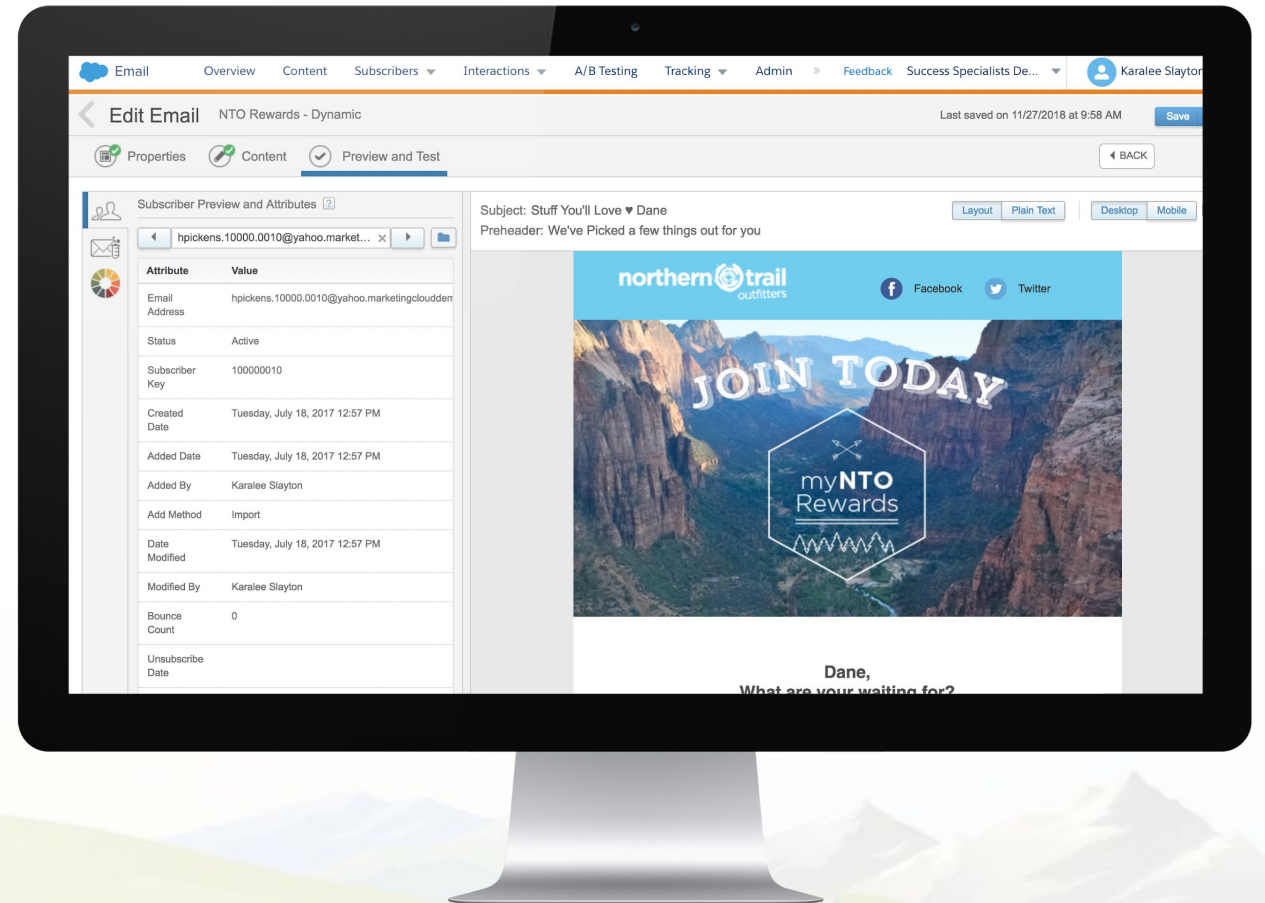
Ensure the accuracy of your email content

### Preview desktop, mobile, and plain text testing features include:

- **Static and subscriber-specific previews:** Review personalization and business logic before sending.
- **Select subscriber from list or data extension:** Attributes and values are displayed.
- **Test send thresholds:** Test send to up to five email addresses or a test data extension.
- **Subject and preheader validation:** Prevent “test,” “draft,” or “proof” related emails from being sent to a customer.

### There are four testing tools available in the Email application:

- Content Detective
- Validation
- Subscriber Preview
- Test Send



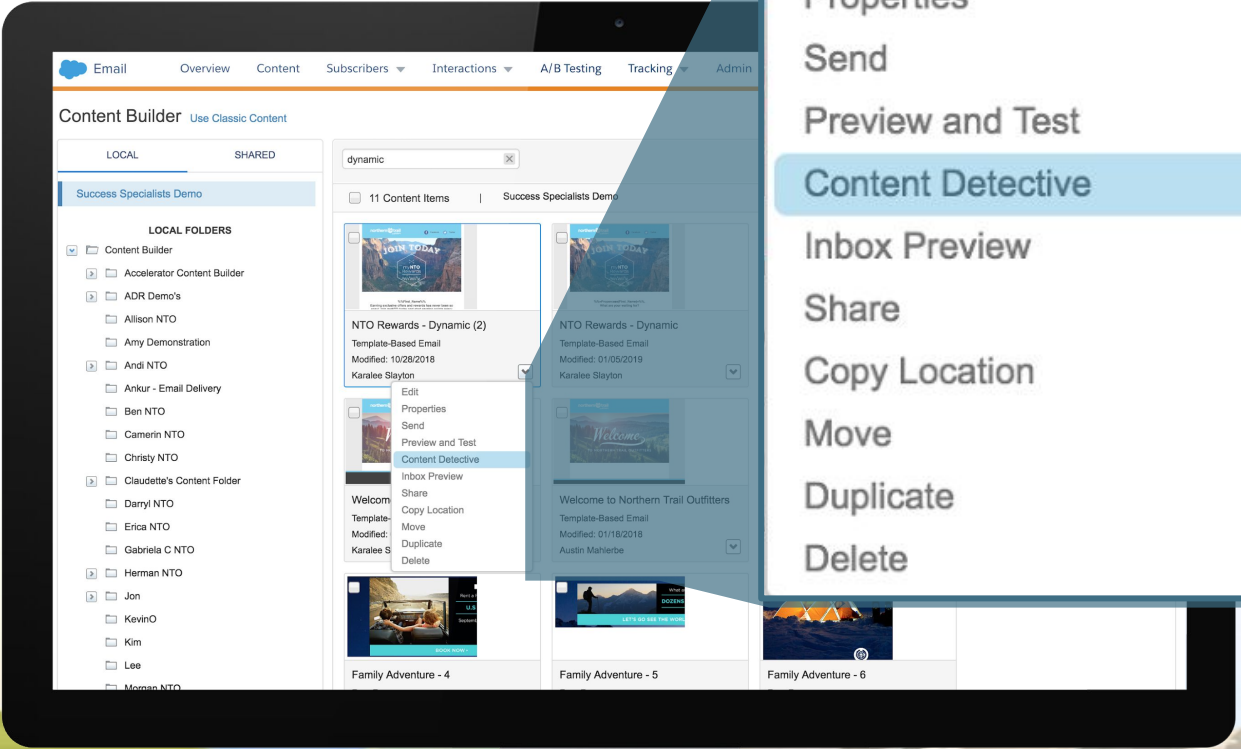


## Preview and Testing Tools

### Content Detective

Helps you identify potential spam triggers in your email content.

- It mirrors logic used by spam-filtering software to identify words, phrases and patterns that are likely to trigger filters.
- Content Detective finds potential problems and suggests solutions.
- It does not scan HTML code to make sure it is written correctly.



The screenshot displays the Salesforce Content Builder interface. The top navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', 'A/B Testing', 'Tracking', and 'Admin'. The main content area shows a list of content items under the 'LOCAL' tab. A context menu is open over a content item, listing the following actions: Edit, Properties, Send, Preview and Test, Content Detective (highlighted), Inbox Preview, Share, Copy Location, Move, Duplicate, and Delete. The background of the slide features a stylized landscape with green hills, a dirt path, and a blue sky.

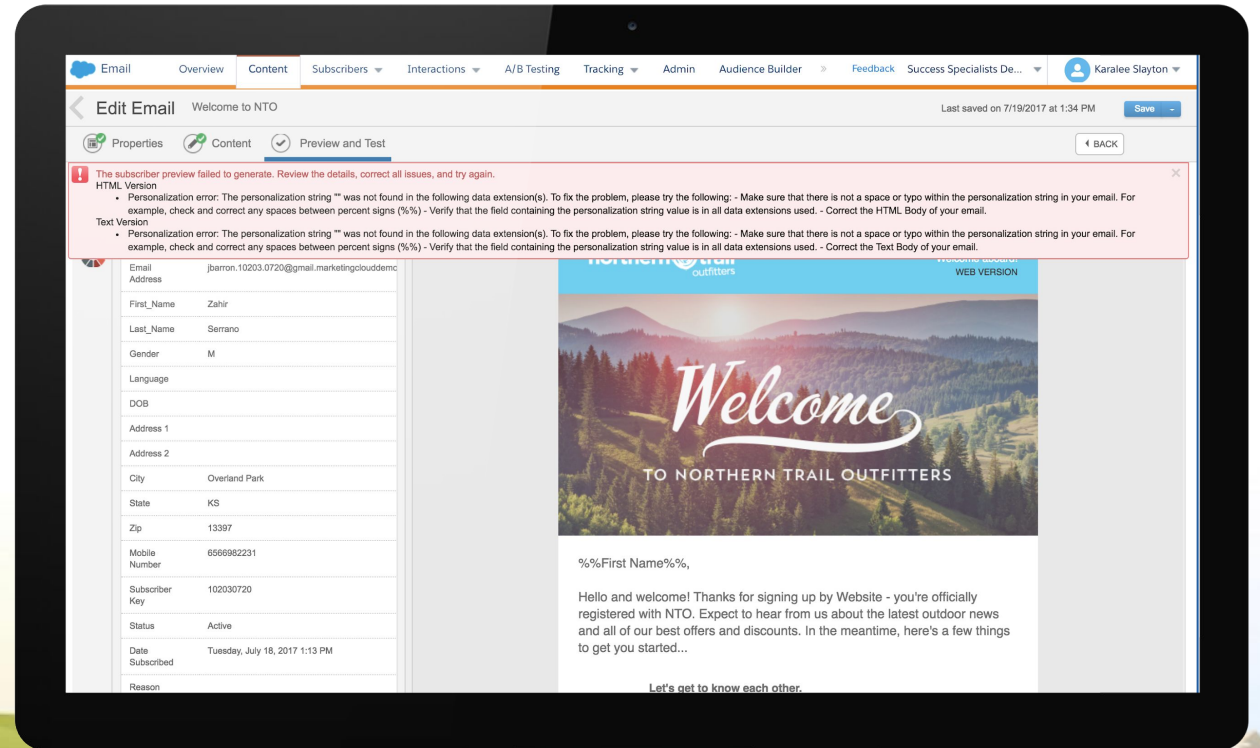
## Preview and Testing Tools

### Validate Your Email Code

Validate your coding before sending.

Validate will confirm:

- Correct field syntax.
- Content and data being used for Dynamic Content rules are built correctly.
- Code such as Guide Template Language and AMPScript is properly written.
- Validates for required elements:
  - Unsubscribe link
  - Physical mailing address



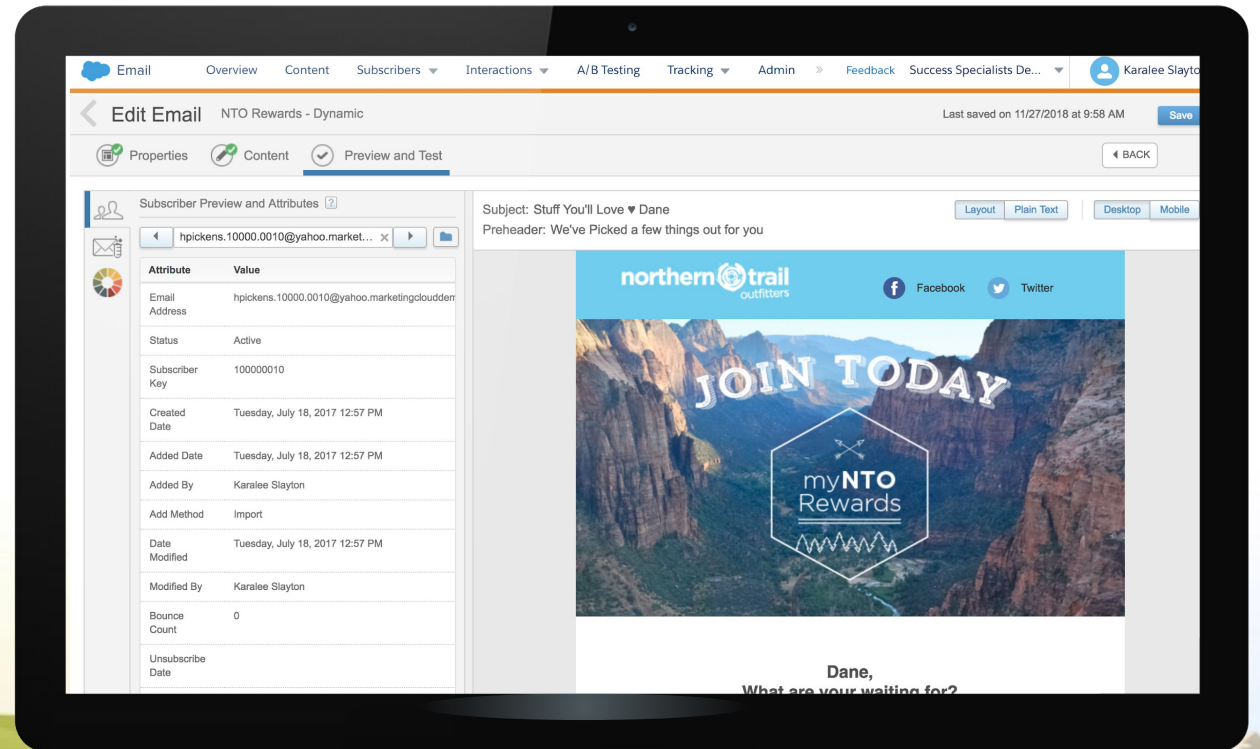
## Preview and Testing Tools

### Preview Your Email

Preview your email as a subscriber before sending.

Preview features include:

- Preview desktop, mobile and plain text versions.
- Static and subscriber-specific previews: Review personalization and business logic before sending.
- Select subscriber from list or data extension: Attributes and values are displayed.



## Preview and Testing Tools

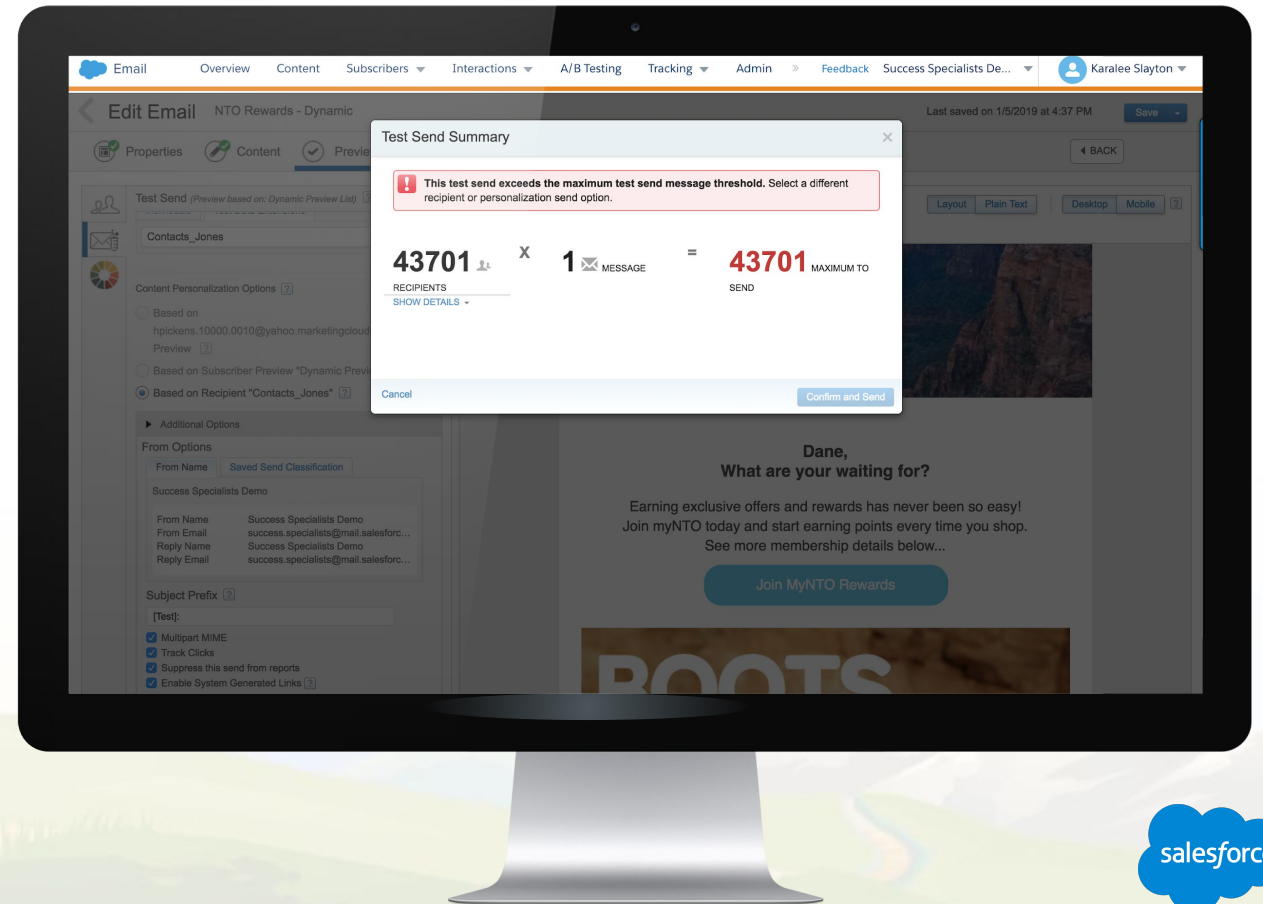
### Test Send Your Email

Test your email internally, before sending to a customer.

Add warnings to reduce risk of test sends sent in error as live sends.

#### Testing features include:

- Test send thresholds: Test send to up to five email addresses or a test data extension.
- Subject and preheader validation: Prevent “test,” “draft,” or “proof” related emails from being sent to a customer.

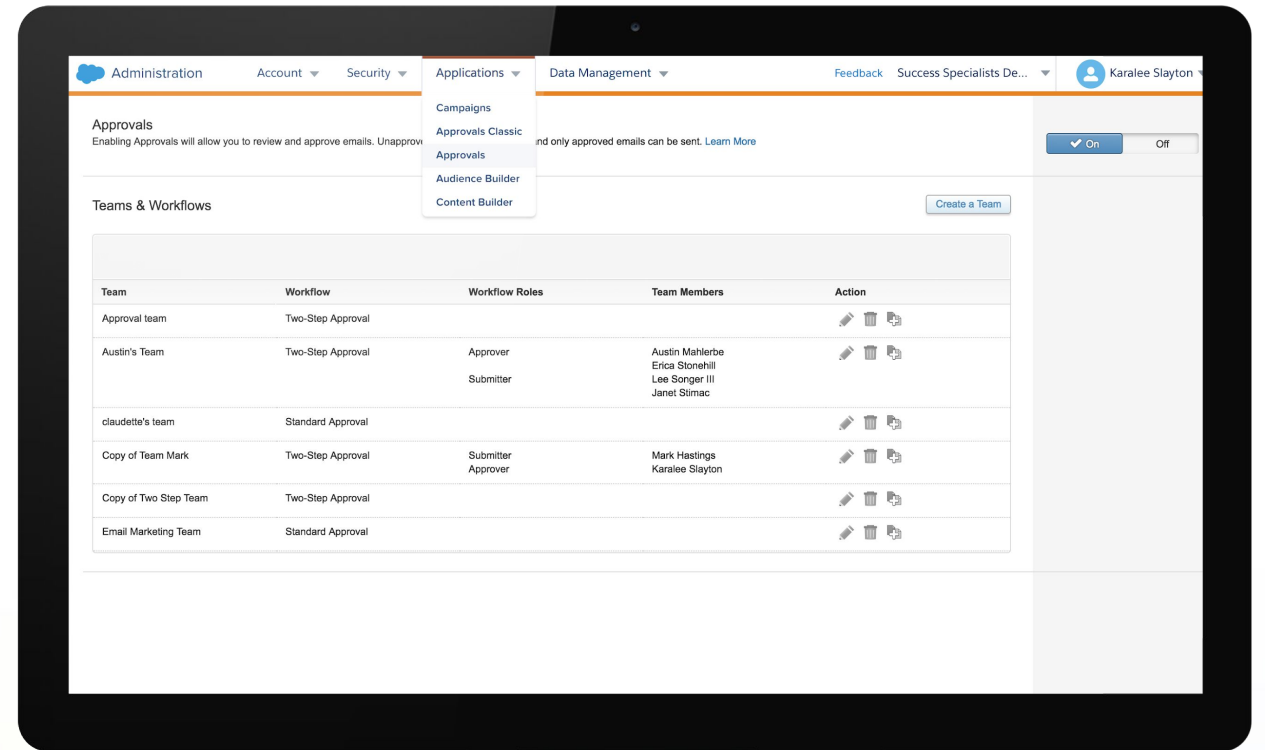


## Email Approvals

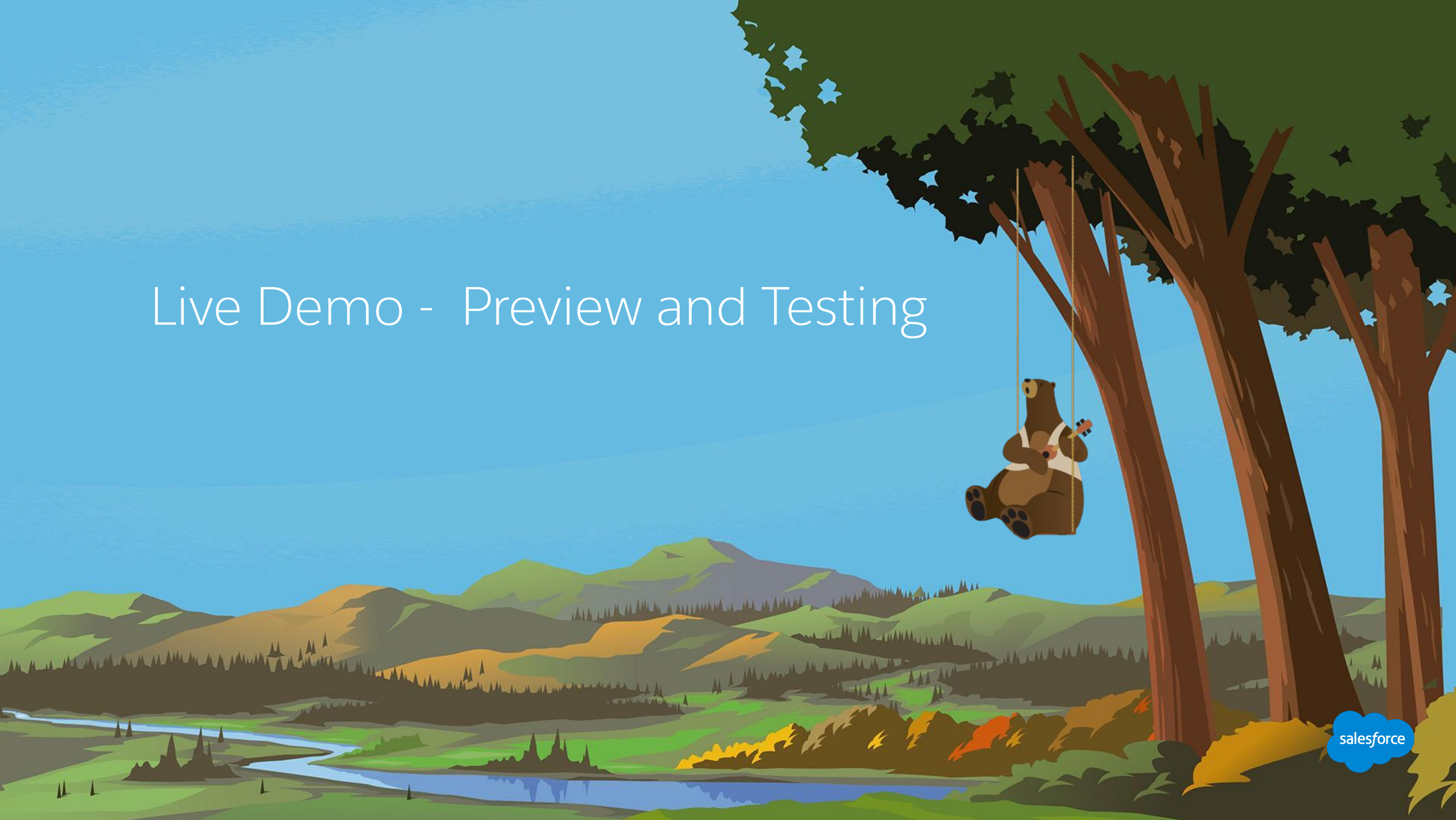
Stay in control of your email campaigns

**Streamline your user experience to facilitate a distributed approval process that ensures emails are not changed and delivered without approval. You can also:**

- Quickly review and approve outgoing email company-wide.
- Keep communications consistent and on brand.
- Meet compliance requirements and improve deliverability.
- Communicate and track all revisions.
- Gain more administration flexibility with roles and teams.



# Live Demo - Preview and Testing



## Preview and Testing

### Administrative considerations

#### Test send thresholds:

- Test send to up to five email addresses or a test data extension.
- Setting test send thresholds are available in
- Email > Admin > Send Management > Test Send Thresholds.

#### Subject and preheader validation:

- Prevent “test” related emails from being sent to a customer.
- Setting test send thresholds are available in Email > Admin > Send Management > Subject/Preheader Validation.

The image displays two screenshots of the Salesforce Email Admin interface. The top screenshot shows the 'Test Send Thresholds' configuration page. The left sidebar lists the navigation menu, with 'Test Send Thresholds' highlighted under 'Send Management'. The main content area has a title 'Test Send Thresholds' and two sections: 'Warning Threshold' and 'Maximum Threshold'. The 'Warning Threshold' section includes a description and an input field with the value '25'. The 'Maximum Threshold' section includes a description and an input field with the value '1000'. The bottom screenshot shows the 'Subject and Preheader Validation' configuration page. The left sidebar lists the navigation menu, with 'Subject/Preheader Validation' highlighted under 'Send Management'. The main content area has a title 'Subject and Preheader Validation' and a description. Below the description are three input fields: 'Test', 'Draft', and 'Proof', each with a trash icon to its right. An 'Add' button is located below the input fields.

## Enabling Approvals and Creating Workflows

### Administrative considerations

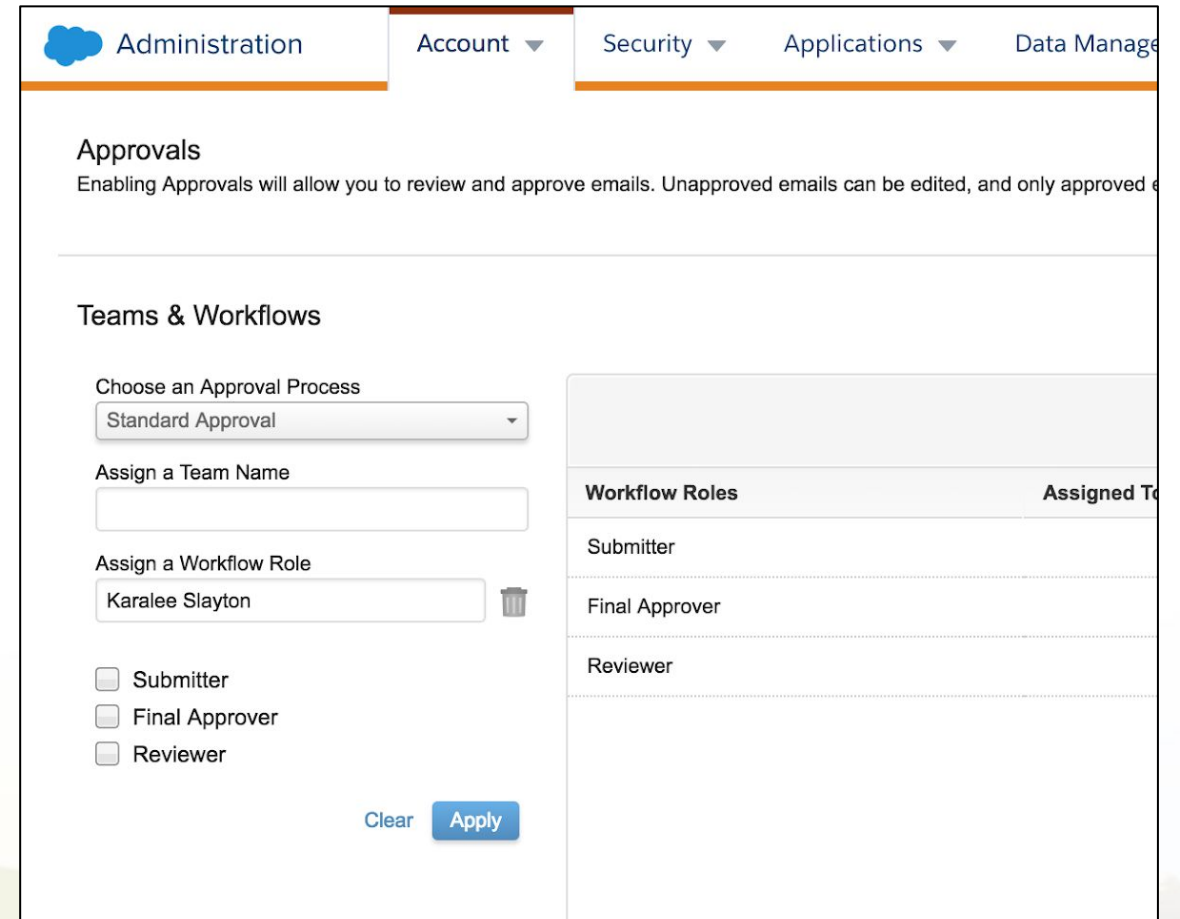
**When Approvals is turned on, unapproved emails can be edited, and only approved emails can be sent. All current unapproved emails will be automatically approved.**

The submitter needs the following permissions:

- Approval items: Create and edit
- Workflow teams: Add or remove users

When Approvals is turned off all emails can be edited and sent at any point.

Once you enable the Approvals process, each email message includes an Approvals status tab that signals the current status of the email message.



The screenshot shows the Salesforce Administration console with the 'Approvals' configuration page. The navigation bar includes 'Administration', 'Account', 'Security', 'Applications', and 'Data Management'. The main content area is titled 'Approvals' and contains the following sections:

- Approvals**: A heading followed by a brief description: 'Enabling Approvals will allow you to review and approve emails. Unapproved emails can be edited, and only approved emails can be sent.'
- Teams & Workflows**: A section for configuring approval processes.
  - Choose an Approval Process**: A dropdown menu currently set to 'Standard Approval'.
  - Assign a Team Name**: An empty text input field.
  - Assign a Workflow Role**: A text input field containing 'Karalee Slayton' with a trash icon to its right.
  - Role Selection**: Three checkboxes for 'Submitter', 'Final Approver', and 'Reviewer', all of which are currently unchecked.
  - Buttons**: 'Clear' and 'Apply' buttons at the bottom of the configuration section.
- Workflow Roles Table**: A table with two columns: 'Workflow Roles' and 'Assigned To'. It lists three roles: 'Submitter', 'Final Approver', and 'Reviewer', each with a dotted line indicating a row for assignment.



## Preview and Testing Email

### Demo Outline

**Test email to up to five recipients. Or test send to a larger audience, testable Data Extension, using Test Data Extensions.**

**Test send emails based on multiple content personalization options:**

- Based on the individual subscriber selected in Subscriber Preview.
- Based on the entire subscriber audience in Subscriber Preview.
- Based on the recipient Test Data Extension

**The Subject Prefix field in the Preview & Test step on the Test Send tab can be updated with a test related-word which will pre-pend to the Subject in the Test Send.**

# Sending Emails



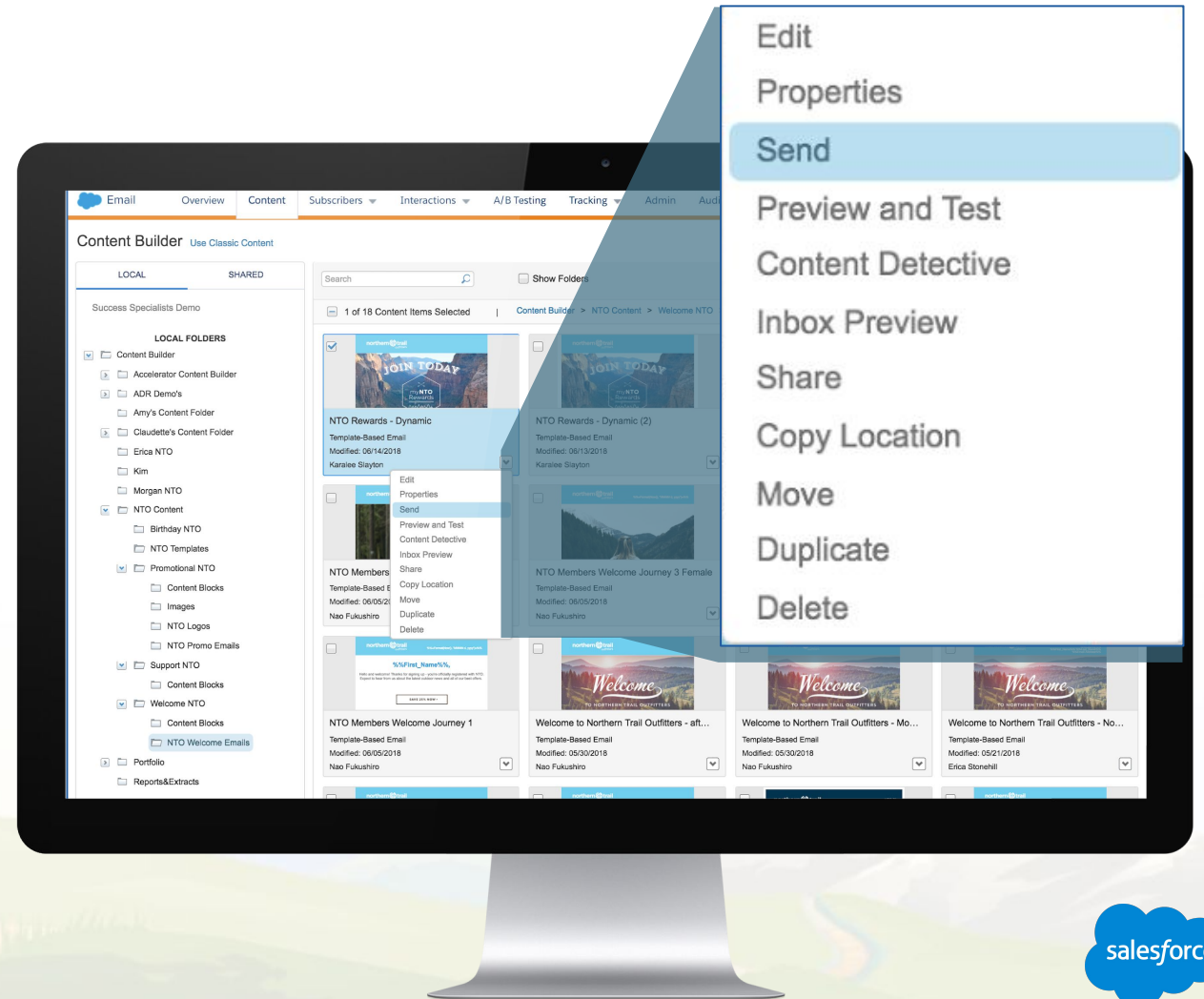
## Email Send Flow

### Step-by-step guide to sending

Four steps to send:

1. **Properties:** Email, Subject Line, Send Classification, etc...
  2. **Audience:** Target, Exclusion, Suppression, etc...
  3. **Delivery:** Schedule, Send Throttling, Advanced Properties.
  4. **Review:** Check and correct errors before sending.
- Increase Confidence:

See what you're sending and reduce errors.



## Email Send Flow

### Demo Outline

From the content grid, you will find all available emails for you to send.

When you click the drop down for a selected email, you will find several actions for you to pick from – including send!

Picking send will take you to the Email Send Flow that is organized into 4 tabs that align with the stages of sending an email. Let's walk through them:

- Define Properties
- Select your audience
- Configure Delivery
- Confirm and send

The screenshot displays the Salesforce Email Send Flow interface. The top navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', 'A/B Testing', 'Tracking', 'Admin', 'Audience Builder', 'Feedback', and 'Success Specialists De...'. The user profile 'Karalee Slayton' is visible in the top right.

The main heading is 'Send Email'. Below it are four tabs: 'Define Properties', 'Select Audience', 'Configure Delivery', and 'Review and Send'. The 'Define Properties' tab is active.

**Email Properties**

- Subject \***: Stuff You'll Love %%First\_Name%%
- Preheader**: We've Picked a few things out for you %%=Propercase(First\_Name)=%%
- From Options**:
  - From Name: Default Commercial
  - Sender Profile: Default
- Delivery Profile**: Default

**NTO Rewards - Dynamic**

This preview does not display personalization or the header and footer for the selected delivery profile.

The preview shows a promotional email for 'northern trail outfitters' with the text 'JOIN TODAY' and 'myNTO Rewards'. Below the image, the text reads: '%%=Propercase(First\_Name)=%%, what are you waiting for?' followed by 'Earning exclusive offers and rewards has never been so easy! Join myNTO today and start earning points every time you shop. See more membership details below...'

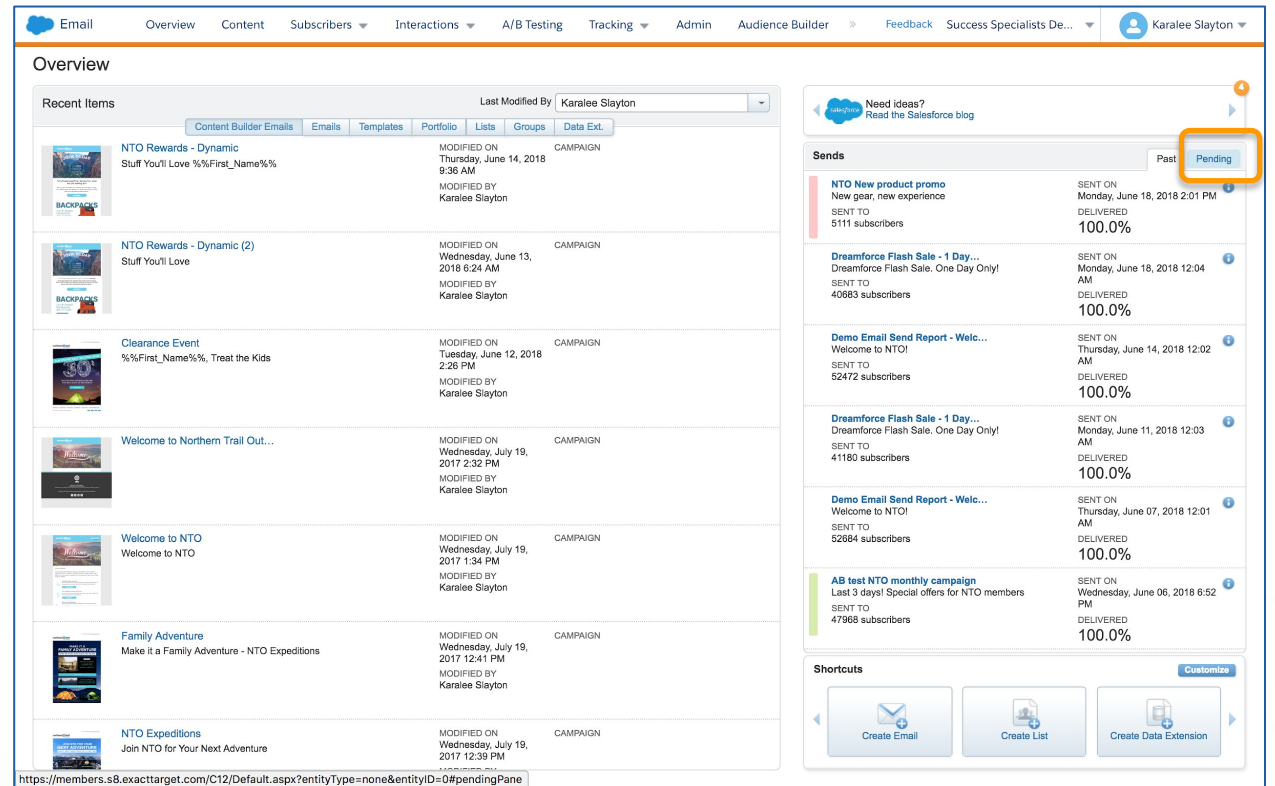
## Canceling an Email Send

Can I cancel a send after I hit send?

You can only cancel a send if it is pending.

If a send in progress is cancelled, some pending emails will be sent.

Emails already sent cannot be recalled.

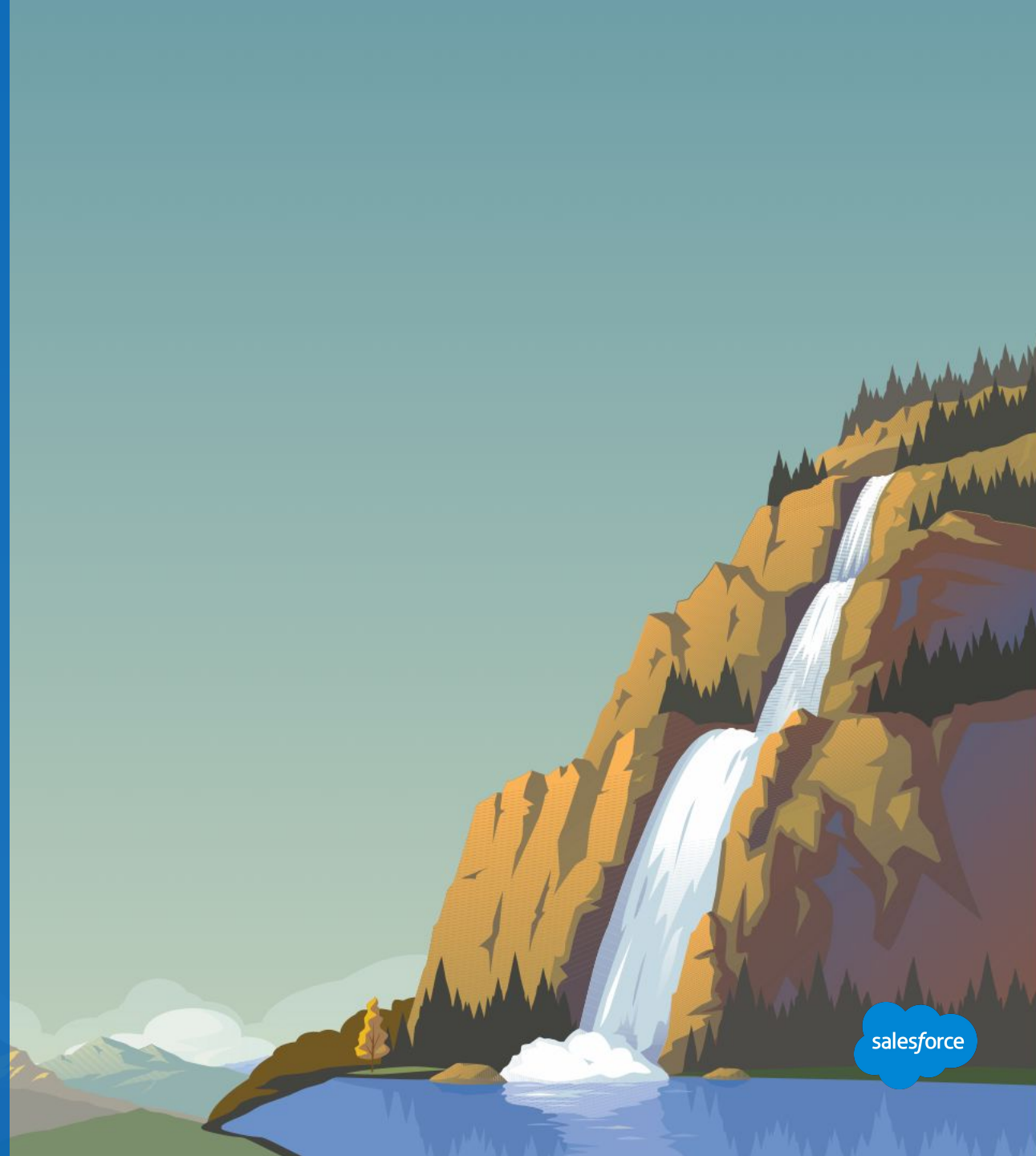


The screenshot displays the Salesforce Email interface. The top navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', 'A/B Testing', 'Tracking', 'Admin', 'Audience Builder', 'Feedback', and 'Success Specialists De...'. The user profile 'Karalee Slayton' is visible in the top right. The main content area is titled 'Overview' and features a 'Recent Items' table. The table lists several email campaigns with columns for 'Content Builder Emails', 'Emails', 'Templates', 'Portfolio', 'Lists', 'Groups', and 'Data Ext.'. The 'Sends' section on the right shows a list of email sends with columns for 'Send', 'Sent On', 'Delivered', and 'Delivered %'. A 'Pending' button is highlighted in the top right corner of the 'Sends' section. The URL at the bottom of the browser window is <https://members.s8.exacttarget.com/C12/Default.aspx?entityType=none&entityID=0#pendingPane>.

Content Builder Emails	Emails	Templates	Portfolio	Lists	Groups	Data Ext.
NTO Rewards - Dynamic	Stuff You'll Love %%First_Name%%					
NTO Rewards - Dynamic (2)	Stuff You'll Love					
Clearance Event	%%First_Name%%, Treat the Kids					
Welcome to Northern Trail Out...						
Welcome to NTO	Welcome to NTO					
Family Adventure	Make it a Family Adventure - NTO Expeditions					
NTO Expeditions	Join NTO for Your Next Adventure					

Send	Sent On	Delivered	Delivered %
NTO New product promo New gear, new experience	Monday, June 18, 2018 2:01 PM	5111 subscribers	100.0%
Dreamforce Flash Sale - 1 Day... Dreamforce Flash Sale. One Day Only!	Monday, June 18, 2018 12:04 AM	40663 subscribers	100.0%
Demo Email Send Report - Welc...	Thursday, June 14, 2018 12:02 AM	52472 subscribers	100.0%
Dreamforce Flash Sale - 1 Day... Dreamforce Flash Sale. One Day Only!	Monday, June 11, 2018 12:03 AM	41180 subscribers	100.0%
Demo Email Send Report - Welc...	Thursday, June 07, 2018 12:01 AM	52684 subscribers	100.0%
AB test NTO monthly campaign Last 3 days! Special offers for NTO members	Wednesday, June 06, 2018 6:52 PM	47968 subscribers	100.0%

# Summary



## Summary - Build, Test and Send Workflow



## Summary

### Reminders and Tips to get started

- Content can be static or individualized.
- A template is a shell for an email and can be re-used.
- A template can be created using HTML or by using a Basic, Empty, Themed or Saved template.
- An email can be populated with various content blocks and multiple content blocks can be placed in a single content area.
- Column layouts allow you to place multiple images or content blocks in a single content area.
- Preview allows you to review your email prior to sending. Individualized content for the subscriber will be rendered in the preview.
- Test Send allows you to send a specific email version or multiple versions to up to 5 recipients to ensure personalization and business logic is set up correctly.
- The Send Flow is an easy to use tool to send your email.



# Resources and Next Steps



## Creating a Template

### Content considerations

#### Use Case

**Challenge:**

You want to create a Template.

**Solution:**

A Content Builder template can be created in two ways, through the selection of an existing template, or through HTML paste.

You can also use any of Content Builder's out-of-the-box responsive templates, electing one of the basic or themed options instead.

**Resources:**

Video: [Create a Template](#)

Documentation: [Build a Template Based Email](#)

#### Considerations

- Will you use a pre-built template?
- What AMPscript or dynamic content is required in the template?
- What placeholders are required?
- How many content areas are required to hold content blocks? Keep in mind you can drag multiple content blocks into a content area.
- What and how many content blocks need to be developed?
- Are code snippets required?
- Is there an available test audience?
- Who needs to receive proofs?
- Are there multiple versions to be proofed?

## Creating an Email

### Content considerations

#### Use Case

**Challenge:**

You want to create an Email and you want to maximize WYSIWYG interface.

**Solution:**

Content Builder provides a great drag-and-drop environment to build emails that render across virtually every device.

**Resources:**

Video: [Create an Email in Content Builder](#)

Documentation: [Create an Email](#)

#### Considerations

- Will you use a template? What placeholders or locked content are required?
- Do you need to adjust the layout?
- What and how many content blocks need to be developed?
- Are code snippets required?
- Is there an available test audience?
- Will this email be shared?
- Who needs to receive proofs?
- Are there multiple versions to be proofed?

## Creating an Email From an Existing Classic Email

### Content considerations

#### Use Case

**Challenge:**

You want to create an email using an existing email you have in Classic. Or Migrate new creative into Content Builder.

**Solution:**

Content Builder allows the ability to create a new Content Builder email based upon an existing email created in either Content Builder or Classic.

**Resources:**

Video: [Add & Import Content](#)

Documentation: [Build an Email from an Existing Email](#)

#### Considerations

- What folder was the original email saved to?
- Is the existing email a template-based email or a paste HTML email?
- Is the existing email using a shared template?
- What content needs to be altered? What remains the same?
- Who needs to receive proofs? Are there multiple versions to be proofed?
- Will this email be shared?
- Is there an available test audience?
- What AMPscript or dynamic content is required?

# Creating an Email From an Existing HTML Email

## Content considerations

### Use Case

**Challenge:**

You want to create an email using an existing email or template you created entirely outside of Content Builder.

**Solution:**

Content Builder makes it easy to paste and preview code and add required elements. The HTML paste option is used when an email or template is coded entirely outside of the Email Editor.

**Resources:**

Documentation: [Build a HTML Paste Email](#)

### Considerations

- What folder was the original email saved to?
- Is the existing email a template based email or a paste HTML email?
- Is the existing email using a shared template?
- What content needs to be altered? What remains the same?
- Who needs to receive proofs? Are there multiple versions to be proofed?
- Will this email be shared?
- Is there an available test audience?
- What AMPscript or dynamic content is required?

## Creating Content Blocks

### Content considerations

#### Use Case

**Challenge:**

You want to create reusable content.

**Solution:**

Create reusable content blocks, including text, HTML, images, buttons, dynamic content, and A/B testing, to ensure relevant messaging reaches the right person every time.

**Resources:**

Documentation: [Create Content Blocks](#)

#### Considerations

- What and how many content blocks need to be developed?
- What naming convention should you follow?
- What folder should this content be saved to?
- Does this content need to be shared or not shared across particular business units?
- Will this content block be used for more than email, such as Cloud Pages?
- How should this content be tagged for easy search optimization?

# Creating Code Snippets

## Content considerations

### Use Case

**Challenge:**

You want to create a Code Snippet.

**Solution:**

Code Snippets will allow non-technical people to use bit of code.

**Resources:**

Video: [Create advanced Templates with Code Snippets](#)

Documentation: [Create Code Snippet](#)

### Considerations

- What and how many code snippets need to be developed?
- Do you already have the code or will you need someone to create the code?
- What naming convention should you follow?
- What folder should this content be saved to?
- Does this content need to be shared or not shared across particular business units?
- Will this code snippet be used for more than email, such as Cloud Pages?
- How should this content be tagged for easy search optimization?

## Next Steps

Where to go from here

- 1 Join the [Salesforce Marketing Cloud Trailblazer Community](#)
- 2 Take the [Marketing Cloud Trailmix Trail](#)
- 3 **Premier Customers:** Request your 1:1 with a Salesforce Success Specialist and plan your next Accelerator (1:1 follow-up request is in the survey).
- 4 Not a Premier Customer but Interested in Learning More? **Reach out to your Salesforce Account Team** for more details.



# We Can Guide Customers Every Step of the Journey

With resources, programs and experts to fit their needs

## Adoption Services

Accelerators  
Interactive Webinars & Events  
Proactive Engagement

## Always On Resources

Trailhead  
Success Communities  
Help Portal

## Advisory Services

Architects  
Customer-Centric Design  
Strategic Services  
Transformation Services

### Show Me How

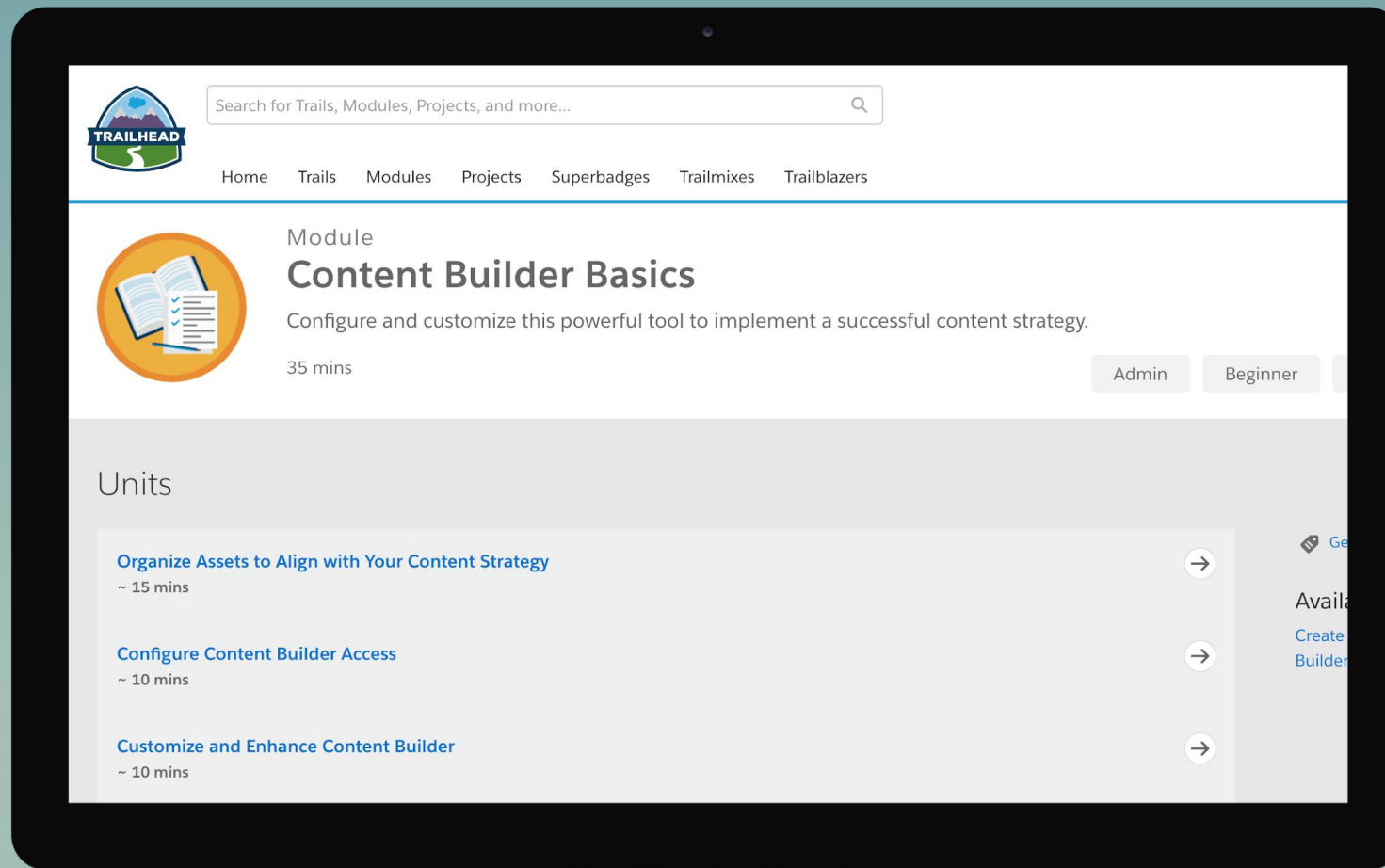
Do It Myself

Do It With Me



customersuccessplatform

# Take the Content Builder Basics Trail



The screenshot displays the Salesforce Trailhead interface. At the top left is the Trailhead logo. A search bar contains the text "Search for Trails, Modules, Projects, and more...". Below the search bar is a navigation menu with links for Home, Trails, Modules, Projects, Superbadges, Trailmixes, and Trailblazers. The main content area features a module card for "Content Builder Basics". The card includes an icon of an open book, the title "Content Builder Basics", a description "Configure and customize this powerful tool to implement a successful content strategy.", and a duration of "35 mins". There are two difficulty level buttons: "Admin" and "Beginner". Below the module card is a section titled "Units" containing three items, each with a right-pointing arrow:

- [Organize Assets to Align with Your Content Strategy](#)  
~ 15 mins
- [Configure Content Builder Access](#)  
~ 10 mins
- [Customize and Enhance Content Builder](#)  
~ 10 mins

## Blaze Your Path to Success, Faster

With Success Plans to Take You Further

	Standard	Premier
Guided Journeys	✓	✓
Success Community	✓	✓
Trailhead	✓	✓
Accelerators & 1:1 follow up		✓
Developer Support		✓
Success Management		✓
Circles of Success		✓
Interactive Webinars		✓
Admin Assist		optional upgrade
Support	12/5 Online 2-Day Response	24/7 Phone & Online 1-Hour Critical Response

[Learn more about Premier Success](#)



## Requirements for 1:1 Follow Up Session

Must be a Premier customer

### All set?

You can request your 1:1 Follow-Up with a Salesforce Success Specialist through survey you will receive after this webinar concludes.



### Resource requirements

- <Participation of your Business (Marketing Analyst/Manager) tasked to deliver targeted engagements.>
- Time commitment of 90 minutes.

### Technical requirements

- <Einstein Engagement Scoring is activated and Scores are available in your org.>
- <If you have not yet activated Engagement Scores but have at least 90 days of email engagement data.>
- <1:1 session is not a good fit, if your Org has enabled Field Level Encryption, Contact Data Encryption, Tokenized Send Caveats.>

## Premier Configuration Services

Included with Premier Success Plan, helps keep your instance of Marketing Cloud up to date by adjusting system configurations as your marketing programs and use cases expand.

CONFIGURATION CATEGORIES/TASKS	DESCRIPTION OF CONFIGURATION TASKS
Business Units	Create business units within a parent account
Sender Profiles	Create sender profiles to assign to send definitions
Data Extensions	Create data extensions with fields and data types to facilitate sending or data storage
Lists	Create lists to facilitate sending
Groups	Create groups by segmenting a list
Headers and Footers	Extract the header and footer content assigned to an account to enable customer review/modification <sup>2</sup>
Delivery Profiles	Provide methods to manage headers and footers via delivery profiles
Account Settings	Review account settings within Administration to ensure proper configuration and customize settings as needed
Roles	Create roles and assign enabled permissions as requested
Send Logs	Create send log data extensions with additional fields as needed
Send Classifications	Create and configure send classifications with specific sender/delivery profiles
User	Create a user to access the Marketing Cloud
Reports	Create a standard report from the report catalog
Tracking Extract	Create an automation that pulls tracking data for a specific time frame or rolling date range
Automating a Report	Automate the delivery of a report from the report catalog
Data Extract	Create an automation to extract data from a data extension
Creating a Report	Reports Create a standard report from the report catalog

## Upcoming Webinars

### Marketing Cloud Events

Getting Started: Marketing Cloud: Content Builder Accelerator Webinar  
[Register Here](#)

Getting Started: Journey Builder: Journey Strategy Accelerator Webinar  
[Register Here](#)

Marketing Cloud Ask an Expert Office Hours  
Every Tuesday and Thursday  
[Register Here](#)



# Questions?



## Send us your Feedback!

After this webinar you'll receive a pop-up with a survey asking you to rank this webinar and if you are a Premier customer if would like to opt-in to a 1:1 engagement after this call.

Your feedback is incredibly valuable to us, so please feel free to add any comments you have about this Accelerator and how it could be improved.





# Thank you

