

Better emails. Better events. Better data.

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CU eComm Alternate Email Address Sends Quick Reference Guide

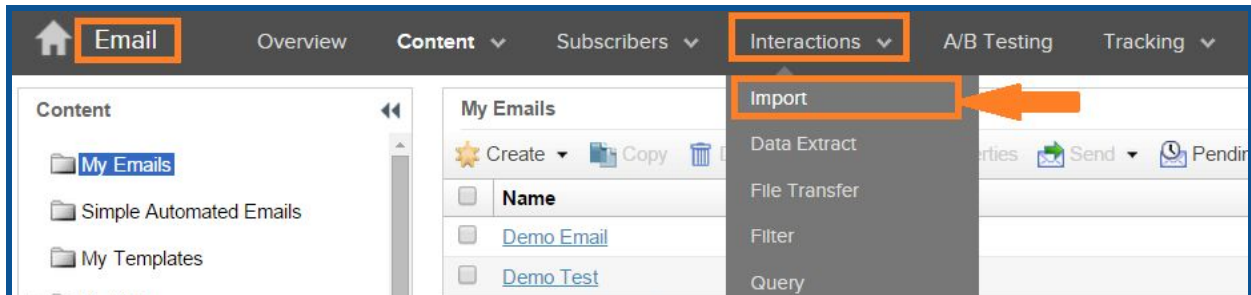
Before you start!

This step-by-step guide is to be used AFTER

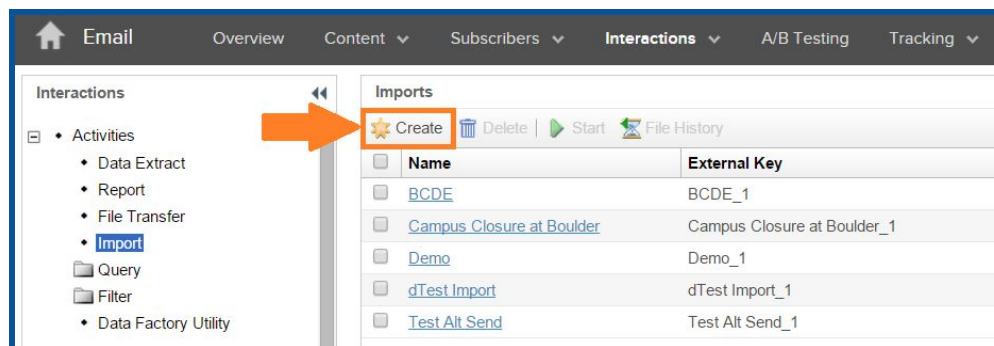
1. you have [built your email](#)
2. your [campus eComm specialist](#) has created your data extension report. If you do not have a report, request one at <http://www.cu.edu/ecomm/ecomm-users/more-stuff>.
3. NOTE: Your campus eComm specialist may have already done this process for you! If they have, all you need to do is [refresh your import](#).

Step 1: Create New Import / Salesforce Data Extension

In Marketing Cloud from the 'Email' app go to 'Interactions', then 'Import'.



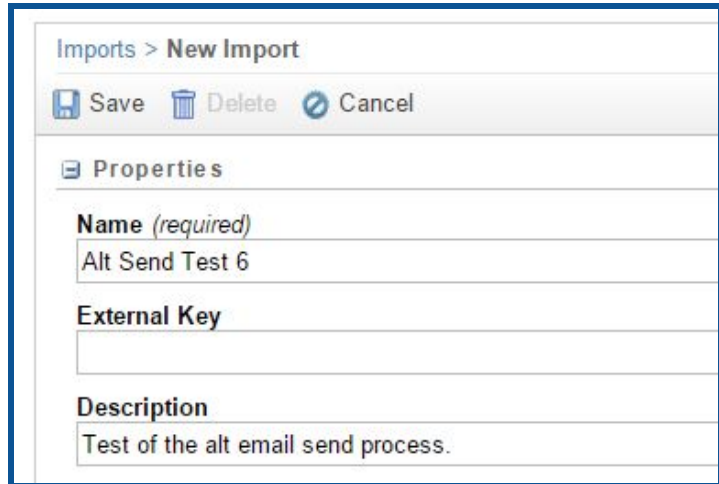
Click the 'Create' button.



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Enter Import **Properties** - leave
'External Key' field blank.

- Name
- External Key leave blank
- Description



Imports > New Import

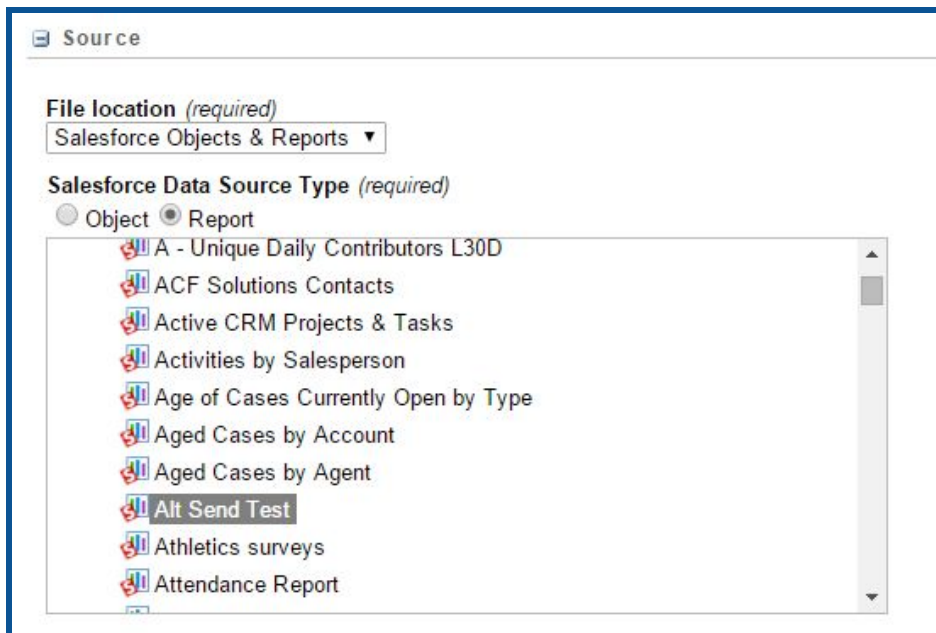
Save Delete Cancel

Properties

Name (required)
Alt Send Test 6

External Key

Description
Test of the alt email send process.



Source

File location (required)
Salesforce Objects & Reports

Salesforce Data Source Type (required)
 Object Report

- A - Unique Daily Contributors L30D
- ACF Solutions Contacts
- Active CRM Projects & Tasks
- Activities by Salesperson
- Age of Cases Currently Open by Type
- Aged Cases by Account
- Aged Cases by Agent
- Alt Send Test**
- Athletics surveys
- Attendance Report

Enter Import **Source** Information

- File Location - Select 'Salesforce Objects & Reports'
- Salesforce Data Type - Select 'Report'
- Find the correct Salesforce Report in the list.

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<input checked="" type="checkbox"/>	Included	Name	Type	Length	<input type="checkbox"/>	Key	<input checked="" type="checkbox"/>	Nullable	Default
<input checked="" type="checkbox"/>		Contact ID	Text	255	<input checked="" type="checkbox"/>		<input type="checkbox"/>		
<input checked="" type="checkbox"/>		First Name	Text	255	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>		Last Name	Text	255	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>		Alternate Email	Email Address	100	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Account Owner	Text	255	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
<input type="checkbox"/>		Account Name	Text	255	<input type="checkbox"/>		<input checked="" type="checkbox"/>		

Buttons: Save Config, Cancel

Select and define report fields.

- Include - Select if the report field should be included in the data extension.
- Type - Select the field type of each fields included in the data extension, be sure to set the email field to a type of **'Email Address'**
- Key - Select the Contact ID as the data extension 'Key'
- Nullable - Deselect any fields that should not be imported if the value in the field is blank.
- Default - If need define a default value to be used for any field that is blank in the report.

Click the "Save Config" button to continue.

Import Action Settings

Update Type (required)
Add and Update

Data Quality Settings

- Skip rows with bad data
- Respect double quotes (") as a text qualifier

Import Qualifications

- Skip import if last import was less than hours ago.
- Fail import if file is older than hours. Allow System Buffer of hours.

Validation

Date Format: English (United States)
Example: 6/2/2016 7:43 AM

Import Completion Settings

- Send notification email to

Continue defining the import:

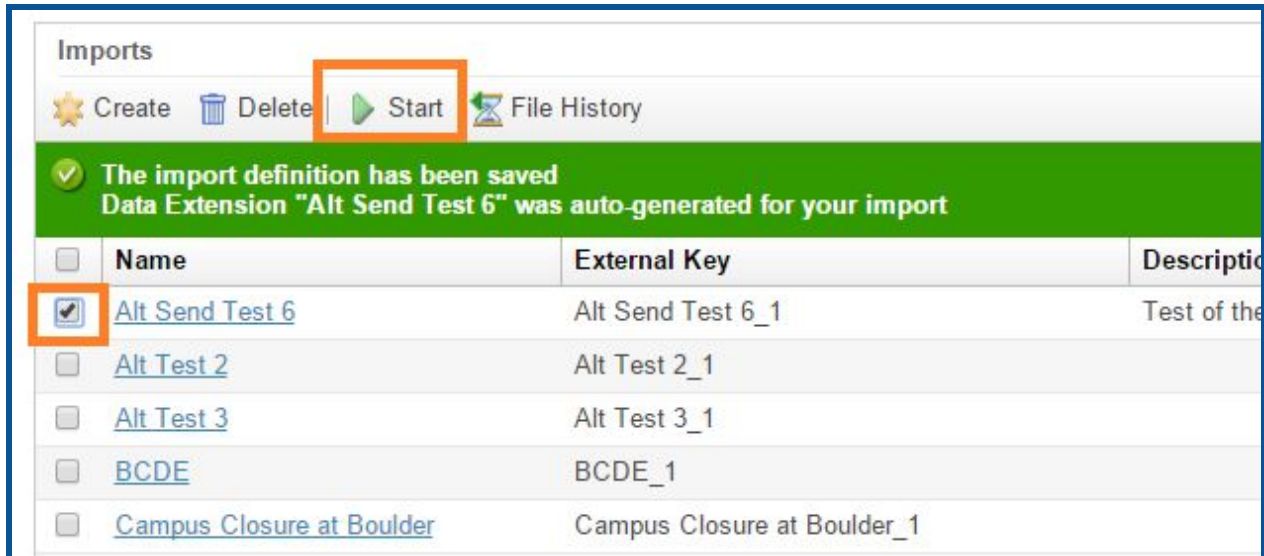
Enter **Import Action Settings** and **Import Competition Settings**

Select Update Type of 'Add and Update'

Enter your email address to be notify upon import completion.

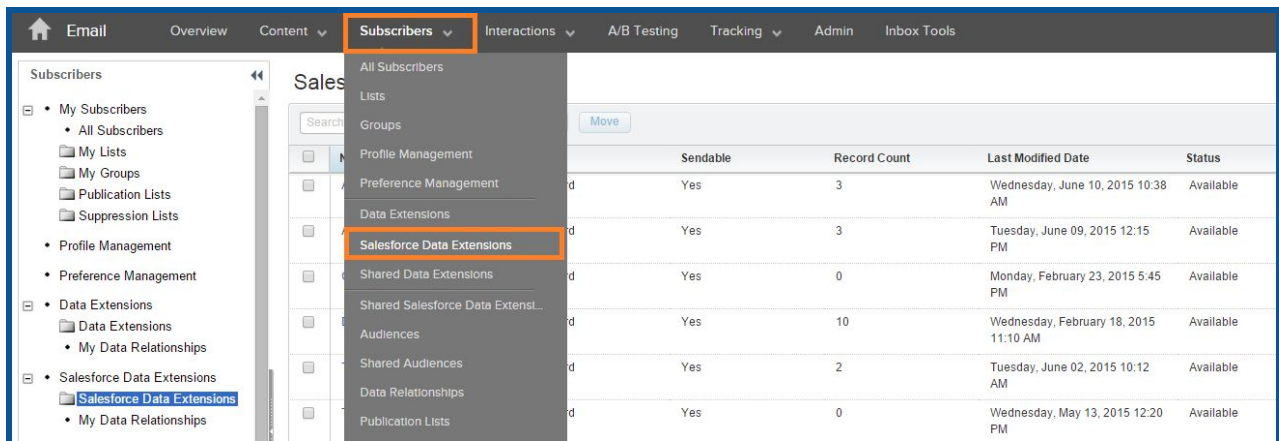
After entering all of the import settings click the 'Save' button at the top of the screen.

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Once the import definition is saved, select the import from the list and click the 'Start' button to run the import and populate the newly created data extension. You will receive an email when it is complete and that indicates the number of records ("subscribers") that were added or updated in Marketing Cloud

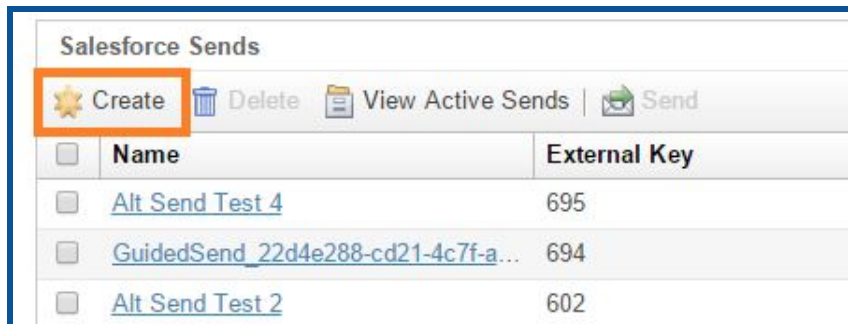
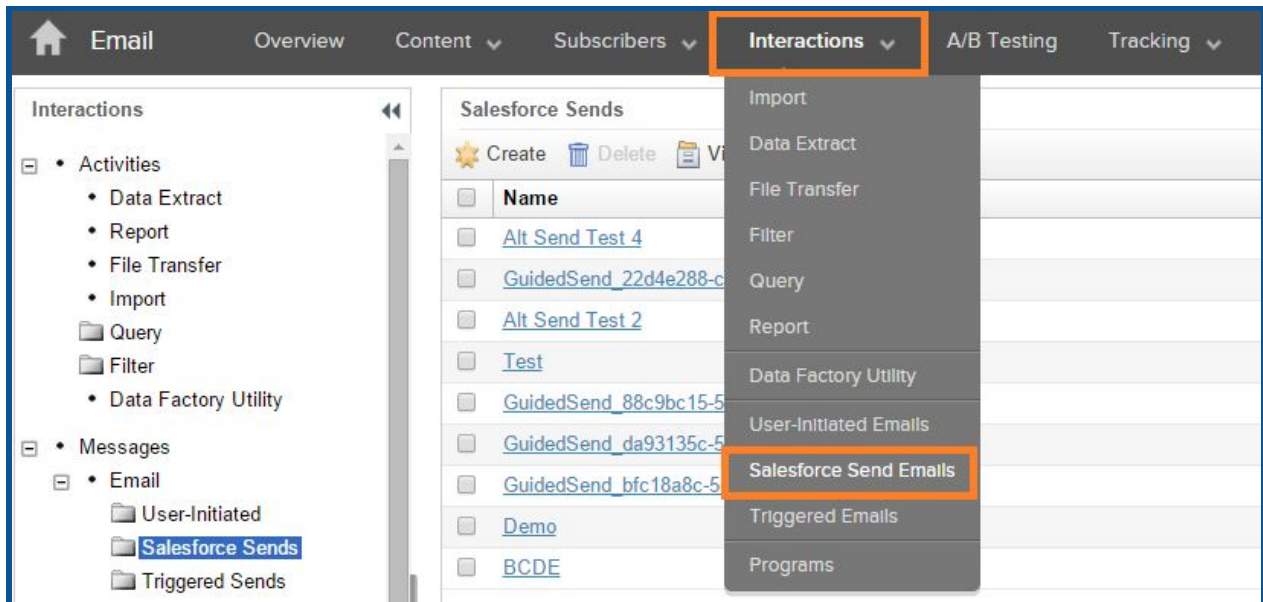
After the import has run, you can view the new Salesforce Data Extension by going to 'Subscribers' and the 'Salesforce Data Extensions'



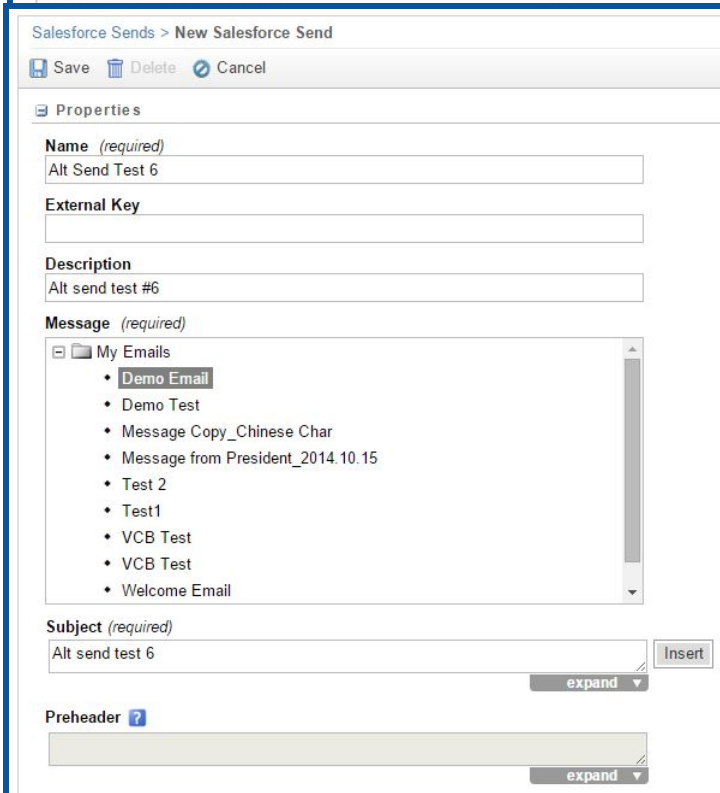
Step 3: Build your Salesforce Data Extension email

To send an email to a Salesforce Data Extension select 'Interactions' and then 'Salesforce Send Emails'

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Click the 'Create' button to create a new 'Send'.



Enter the email send

Properties:

- Name
- External Key: Leave blank
- Description
- Message: Select from previously created emails.
- Subject: Email Subject Line
- Preheader: Email preheader text

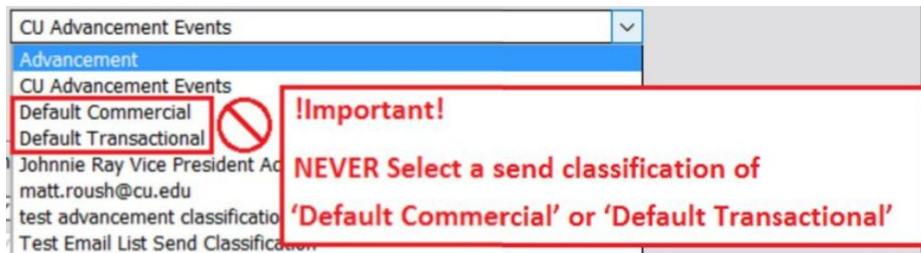
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IMPORTANT: Send Classification

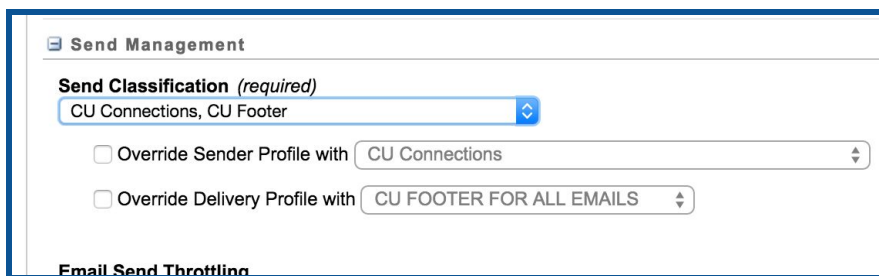
Send classifications drive the system-generated footer that is appended to every email that is sent from your Marketing Cloud unit. The footer includes a link to your unit's unique profile center where your constituent opts in or out of email preference categories.

Select a Send Classification

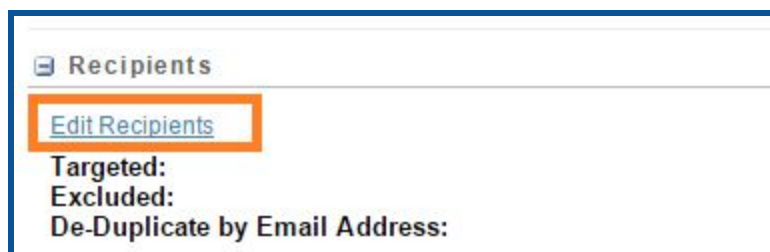
- **! IMPORTANT ! - NEVER EVER** select *Default Transactional* or *Default Commercial*



- **If you are sending a transactional email**, look for a send classification with the word, “TRANSACTIONAL” in the name of the send classification. If you do not see one, inquire with your st oeComm specialir request one to be added to your account
 - eComm specialist: <http://www.cu.edu/ecomm/contact-us/ecomm-specialists>
 - Add a send classification: <http://www.cu.edu/ecomm/ecomm-users/more-stuff>
- **If you are sending a commercial email**, the name of the send classification will be generic and the Delivery Profile will say, “CU FOOTER FOR ALL EMAILS”



! IMPORTANT ! ALL commercial emails must have the “CU FOOTER FOR ALL EMAILS” Delivery Profile selected



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Click the 'Email Recipients' link to select the Salesforce Data Extension to be used for this send.

Salesforce Sends > Alt Send Test 6 > Send Definition Recipients

Save Cancel

Recipients

Select Recipients

- Salesforce reports
- Salesforce campaigns
- Salesforce Data Extensions
 - Alt Send Test 6
 - Alt Test 3
 - Campus Closure at Boulder
 - Demo
 - Test Alt Send
 - Test Data Extension
- Shared Salesforce Data Extensions

Targeted

Alt Send Test 6

Excluded

Audience Options

De-duplicate by email address

In the new window select the Salesforce Data Extension to be used for this send. Click the right arrows to move the selection to the 'Targeted' box.

NOTE: If you are sending a Commercial email, you MUST also have an exclusion ("UNSUB") report to exclude those who have opted out, deceased or have a FERPA flag. YOU must go through the same process and create a data extension for the UNSUB report. Marketing CCloud does not allow for a data extension report to be associated with a report, for example. BOTH must be data extensions.

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Recipients

[Edit Recipients](#)

Targeted:
Salesforce Data Extensions : Alt Send Test 6 (3 Subscribers)

Excluded:
De-Duplicate by Email Address: Yes

Message Properties

Multi-part MIME

User Tracking

Track all links found within this email.
 Suppress this Send from Reports.
 Send Salesforce Tracking Data

De-duplicate by email address

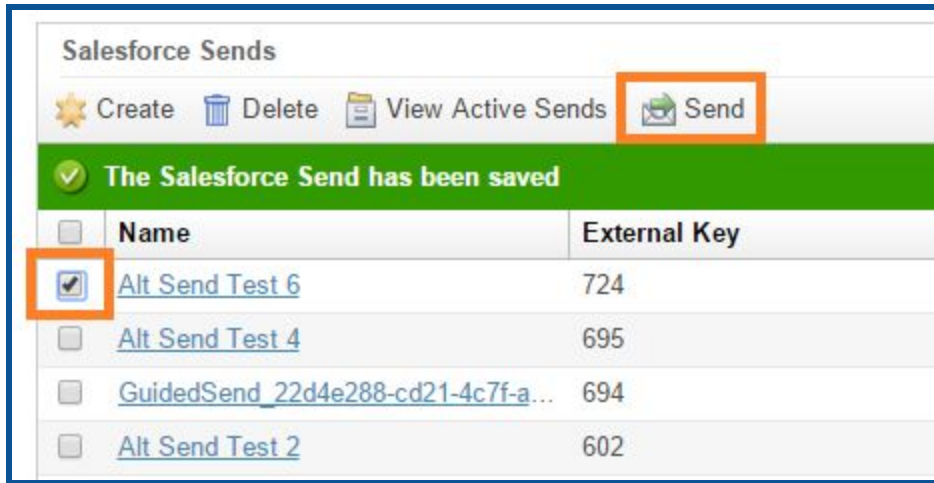
Continue entering the send information as you would for a normal email send.

After entering all of the import settings email send information click the 'Save' button at the top of the screen.

Step 4: Preflight Checklist

Step 5: Send your Salesforce Data Extension email

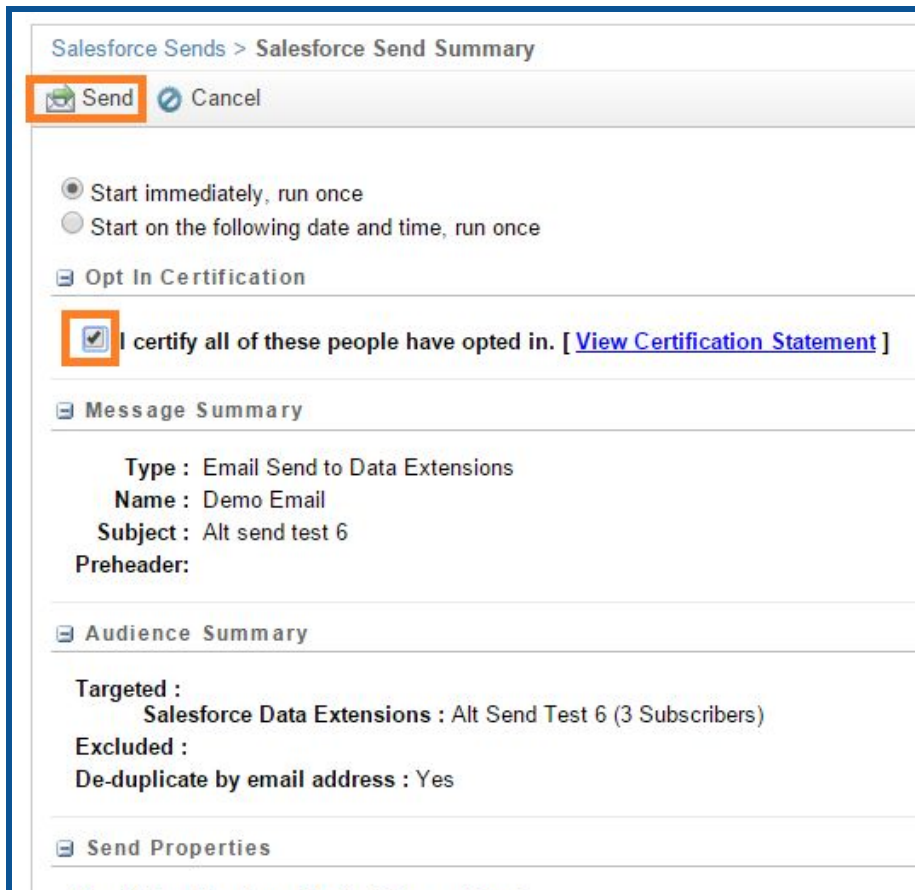
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The screenshot shows the 'Salesforce Sends' interface. At the top, there are buttons for 'Create', 'Delete', 'View Active Sends', and 'Send'. The 'Send' button is highlighted with an orange box. Below the buttons is a green notification bar that says 'The Salesforce Send has been saved'. Underneath is a table with columns 'Name' and 'External Key'. The first row, 'Alt Send Test 6', has its checkbox selected and is highlighted with an orange box. Other rows include 'Alt Send Test 4', 'GuidedSend_22d4e288-cd21-4c7f-a...', and 'Alt Send Test 2'.

<input type="checkbox"/>	Name	External Key
<input checked="" type="checkbox"/>	Alt Send Test 6	724
<input type="checkbox"/>	Alt Send Test 4	695
<input type="checkbox"/>	GuidedSend_22d4e288-cd21-4c7f-a...	694
<input type="checkbox"/>	Alt Send Test 2	602

To send to the newly created Salesforce Send record, Select the Send record from the list and click the 'Send' button.



The screenshot shows the 'Salesforce Send Summary' configuration page. At the top, there are 'Send' and 'Cancel' buttons, with 'Send' highlighted by an orange box. Below are radio buttons for 'Start immediately, run once' (selected) and 'Start on the following date and time, run once'. There is a section for 'Opt In Certification' with a checked checkbox and the text 'I certify all of these people have opted in. [View Certification Statement]', where the checkbox is highlighted by an orange box. Below that is a 'Message Summary' section with fields for 'Type', 'Name', 'Subject', and 'Preheader'. The 'Audience Summary' section shows 'Targeted' as 'Salesforce Data Extensions : Alt Send Test 6 (3 Subscribers)', 'Excluded', and 'De-duplicate by email address : Yes'. At the bottom is a 'Send Properties' section.

Select the send timing, check the certification check box and then click the 'Send' button.