UNIVERSITY OF COLORADO

eComm

Better emails. Better events. Better data.

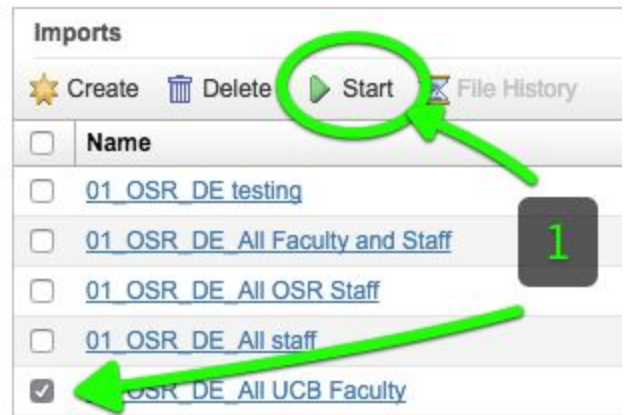**www.cu.edu/ecomm**

Sending to internal audiences (aka alternate email addresses)
A step-by-step checklist for sending an email with data extensions

Before you start!

This checklist is to be used after you have built your email, and after you have built your data extension (under import).

Refreshing your email list:

❏ Go to **Interactions** menu in the navigation bar.

❏ Click the check boxes in front of each of the imports (data extensions) you will use for your email. *Image 1*

❏ Click the **Start** button in the navigation bar. *Image 1*

Building your Salesforce Send definition:

❏ Select the **Salesforce Sends** folder in the sidebar menu. *Image 2*

❏ Click the **Create** button in the navigation bar.

❏ **Name** your email.

❏ Skip **External Key** field.

❏ Either duplicate email name in **Description**, or type in email description.
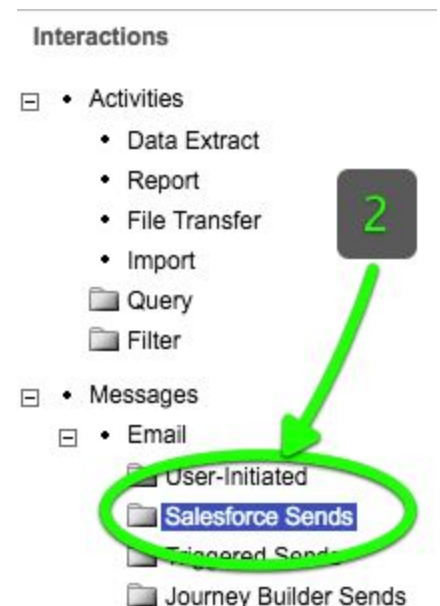
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❏ Select the email you have built in the **Message** field. This will populate the subject and preheader you created when you built the email.

❏ Pick your **Send Classification**:

    ❏ NEVER pick a classification with default in the title.

    ❏ If you don't see a prebuilt classification that you need, contact your eComm Specialist - DO NOT send the email without the correct send classification.
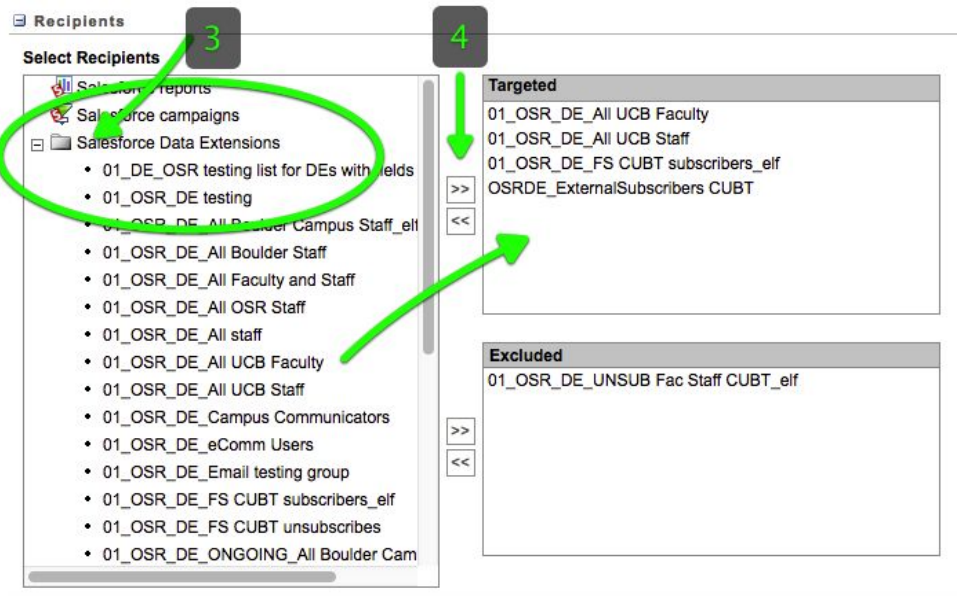
❏ Pick your recipients, selecting from the **Salesforce Data Extensions** you have previously built. *Image 3*

❏ Use the arrows in the center to move your selections, one at a time, from the left-hand pane to the right hand pane. *Image 4*

❏ Make sure to also include a data extension for your unsubscribe list, if appropriate.

❏ Click **Save** in the navigation bar and return to building your **Salesforce Send** definition.

❏ You can leave all items in **Message properties** as default values.

❏ Click the **Save** button to save this email definition, and finalize it for sending.

When you are ready to send the email:

❏ Click the **check box** in front of the Salesforce Send you have built

❏ Click the **Send** button in the navigation bar.

❏ Select whether you will send immediately or later.

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❏ Check the **Opt In Certification**.

❏ Review the **Message Summary**.

❏ Click **Send** in the navigation bar and your email will deliver.