

Scheduling Salesforce Send Emails in Automation Studio

[1]



November 1, 2019 by [jennifer.mortensen](#) [2]

Many communicators send recurring communications to the same audience. While that's a good thing, it can sometimes lead to a lot of manual work when you're updating data extensions and building seemingly endless Salesforce Send Emails in Marketing Cloud that can make your work space seem a bit cluttered. If you're ready to streamline your communication efforts, Automation Studio can help you achieve that goal. For this example, we'll be using a recurring send to data extensions.

PRE-REQUISITE This wiki assumes that you've already read and understood [Scheduling Data Extension Imports in Marketing Cloud](#) [3]. If you haven't yet reviewed that wiki, please do so before proceeding.

Selecting your Audience

The first step in automating a Salesforce Send Email is selecting and configuring your data extensions as described in [Scheduling Data Extension Imports in Marketing Cloud](#) [3]. For this example, we'll be focusing on the automated send used for the weekly CU Connections email in the Office of the President.

Once you've created your automation and have your audience data extension imports configured, your **Workflow** tab might look something like the image below. In the screen shot, you can only see four files being imported, but there are five more present below the screen line, so you can add as many as you need for your send.

You'll also notice that the **Workflow** tab divides your activities into a **series of steps**: Step one, Step 1.1, Step 1.2, and so on. This is the order in which the data extension imports will occur. If it's helpful, you can label the category of the overarching step on the canvas (in this case, we've labeled **Step 1** "Faculty and Staff").


CU Connections Weekly Send


SUMMARY
 ✓ 10/30/2019 1:04 PM
 LAST SAVED

WORKFLOW
 ✓ 11 ACTIVITIES
 IN 3 STEPS


ACTIVITY
 10/31/2019 6:09 AM
 COMPLETED


STARTING SOURCES



 Schedule



 File Drop


ACTIVITIES



Data Extract



Data Factory Utility



File Transfer



Filter



Fire Event



Import File



Refresh Group


Refresh Mobile Filtered List


Report Definition



SQL Query


Salesforce Email Send


Script

STARTING SOURCE

SCHEDULE



Edit

Active
✓ Paused

REPEAT:
Once

STARTING:
10/31/2019 6:00 AM

TIME ZONE:
(GMT-07:00) Mountain Time (US & Canada) *


The schedule has successfully completed and must be rescheduled and activated to resume.

Skip Next Occurrence


Step 1

ANNOTATIONS
Faculty and Staff


1.1 Import File

 08 UREL OG SYS Emp SUB Connections


1.2 Import File

 08 UREL OG AMC Emp SUB Connections

1.3 Import File

 08 UREL OG DUAL Emp SUB Connection

1.4 Import File

 08 UREL OG UCB Emp SUB Connections

Adding a Wait Time to Your Automation

If you're feeling a bit nervous about your data extensions running successfully and want build time into the send to double check that there are no errors, you can do so by dragging the **Wait** option from the **Activities** menu into the canvas space designated for **Step Two** of your automaton. This means that after the data extensions have imported, the automation will wait for the amount of time you specify before moving onto the actual send.

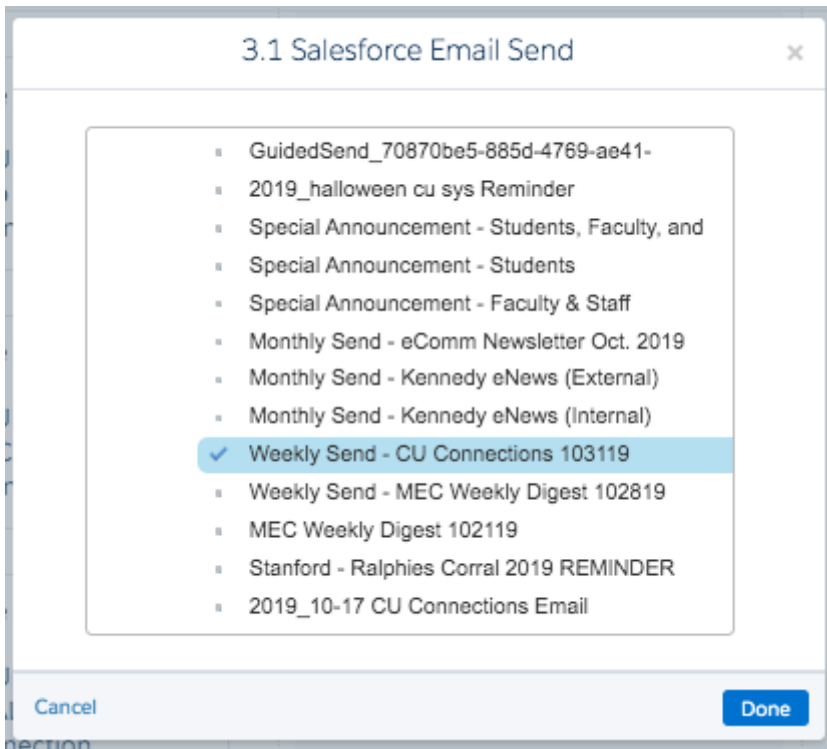
Linking Your Automation to a Salesforce Send Email

Automation Studio is designed to connect with **Salesforce Send Emails ONLY**. If you're not familiar with how to create a Salesforce Send Email, review [Marketing Cloud | Salesforce Send Email](#) [4]. Once you've selected your audience and scheduled any desired wait time, your next step is to link your automation to an already-existing Salesforce Send Email.

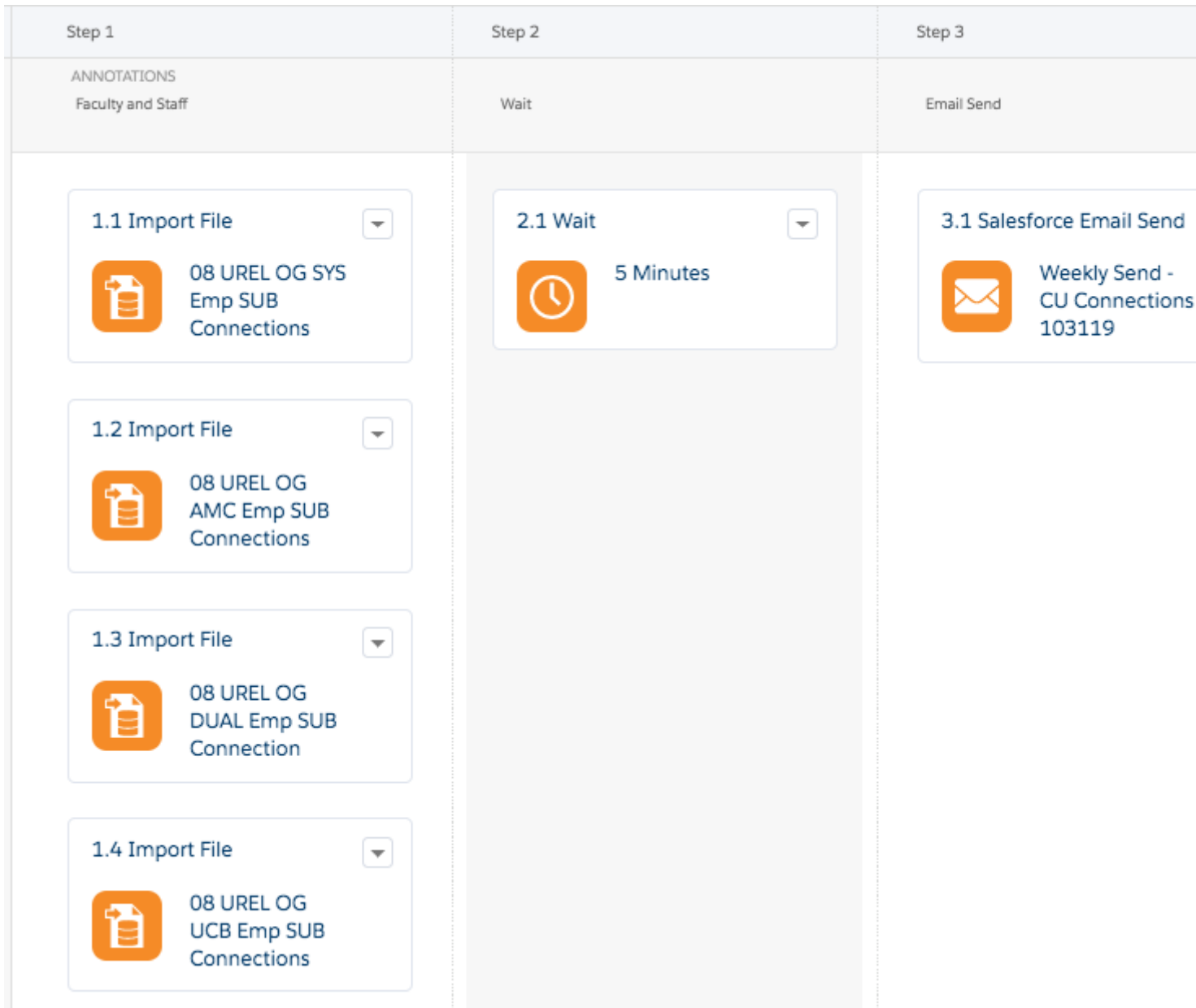
From the Activities menu, drag the **Salesforce Email Send Option** onto **Step 3** of your Workflow tab canvas. You'll then click the **Choose** button to select the **Salesforce Send Email** that you've already configured in Email Studio.

CU Connections Weekly Send	SUMMARY ✓ 10/30/2019 1:04 PM LAST SAVED	WORKFLOW ✓ 1 UNDEFINED ACTIVITY	ACTIVITY 10/31/2019 6:09 AM COMPLETED
<div style="display: grid; grid-template-columns: repeat(3, 1fr); gap: 10px;"> <div data-bbox="193 300 284 389"></div> <div data-bbox="172 409 300 434">Data Extract</div> <div data-bbox="381 300 472 389"></div> <div data-bbox="359 409 486 465">Data Factory Utility</div> <div data-bbox="569 300 660 389"></div> <div data-bbox="547 409 675 434">File Transfer</div> <div data-bbox="193 512 284 602"></div> <div data-bbox="209 622 264 647">Filter</div> <div data-bbox="381 512 472 602"></div> <div data-bbox="371 622 475 647">Fire Event</div> <div data-bbox="569 512 660 602"></div> <div data-bbox="552 622 668 647">Import File</div> <div data-bbox="193 696 284 786"></div> <div data-bbox="161 806 309 831">Refresh Group</div> <div data-bbox="381 696 472 786"></div> <div data-bbox="347 806 501 862">Refresh Mobile Filtered List</div> <div data-bbox="569 696 660 786"></div> <div data-bbox="560 806 663 862">Report Definition</div> <div data-bbox="193 911 284 1001"></div> <div data-bbox="177 1021 293 1046">SQL Query</div> <div data-bbox="381 911 472 1001"></div> <div data-bbox="365 1021 480 1077">Salesforce Email Send</div> <div data-bbox="569 911 660 1001"></div> <div data-bbox="579 1021 643 1046">Script</div> <div data-bbox="193 1126 284 1216"></div> <div data-bbox="177 1236 293 1261">Send Email</div> <div data-bbox="381 1126 472 1216"></div> <div data-bbox="347 1236 501 1292">Send GroupConnect</div> <div data-bbox="569 1126 660 1216"></div> <div data-bbox="552 1236 668 1261">Verification</div> <div data-bbox="193 1341 284 1431"></div> <div data-bbox="209 1451 264 1476">Wait</div> </div>		<p>STARTING SOURCE</p> <p>SCHEDULE</p> <div data-bbox="879 427 1011 562"></div> <div data-bbox="804 589 1088 651"> Edit </div> <div data-bbox="804 685 1088 721"> <input type="checkbox"/> Active <input checked="" type="checkbox"/> Paused </div> <p>REPEAT: Once</p> <p>STARTING: 10/31/2019 6:00 AM</p> <p>TIME ZONE: (GMT-07:00) Mountain Time (US & Canada) *</p> <p>The schedule has successfully completed and must be rescheduled and activated to resume.</p> <div data-bbox="804 1171 1038 1207"> Skip Next Occurrence </div>	<p>Step 1</p> <p>ANNOTATIONS Faculty and Staff</p> <div data-bbox="1189 499 1591 712"> <p>1.1 Import File ▼</p> <div data-bbox="1217 589 1305 678"></div> <p>08 UREL OG SYS Emp SUB Connections</p> </div> <div data-bbox="1189 757 1591 969"> <p>1.2 Import File ▼</p> <div data-bbox="1217 846 1305 936"></div> <p>08 UREL OG AMC Emp SUB Connections</p> </div> <div data-bbox="1189 1014 1591 1227"> <p>1.3 Import File ▼</p> <div data-bbox="1217 1104 1305 1193"></div> <p>08 UREL OG DUAL Emp SUB Connection</p> </div> <div data-bbox="1189 1272 1591 1485"> <p>1.4 Import File ▼</p> <div data-bbox="1217 1361 1305 1451"></div> <p>08 UREL OG UCB Emp SUB Connections</p> </div>

Select your desired **Salesforce Send Email** from the list of options that appears. Click **Done** when you are finished.



Step 3 of your automation is now complete.



Scheduling Your Send

Once your audience, desired wait time, and Salesforce email send have been configured, you're ready to schedule your send. It will be like Marketing Cloud magic: your data extensions will run, your desired wait time will be built in, and your email will go to the correct, recently updated audience.

To schedule your automation and email send, click on **Configure** or **Edit** (if you've already used this automation before) under the **Schedule Starting Source**. For our example, we'll be selecting **Edit**.

Define your scheduled send time based on the parameters provided, and click **Done** when finished.

Define Schedule

i After defining the schedule and then Saving the automation, it will be paused until you set the schedule toggle to Active. The automation can still be run manually by clicking Run Once.

Start Date



at



Time Zone

* Denotes this time zone honors daylight savings time

Repeat

[Clear Schedule](#)

[Cancel](#)

[D](#)

Save your automation and then update its status from **Paused** to **Active**. Click **Save** again when you are finished.

STARTING SOURCE

SCHEDULE



 [Edit](#)

[Active](#) [Paused](#)

REPEAT:

Once

STARTING:

11/04/2019 6:00 AM

TIME ZONE:


(GMT-07:00) Mountain Time (US & Canada) *

The schedule is suspended and must be activated for scheduled runs to resume.

[Skip Next Occurrence](#)

SCHEDULE



 [Edit](#)

[Active](#) [Paused](#)

REPEAT:

Once

STARTING:

11/04/2019 6:00 AM

TIME ZONE:

(GMT-07:00) Mountain Time (US & Canada) *

NEXT RUN:

11/04/2019 6:00 AM

[Skip Next Occurrence](#)

REMINDER Any changes you make in your automation after activating it and saving it will result in the automation being paused. Be sure to reactivate your automation if you make any

changes.

Related Content

- [How can I organize my work between Email Studio and Automation Studio?](#) [5]
- [How do I schedule Data Extension imports in Automation Studio?](#) [3]

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[4] <https://www.cu.edu/blog/ecommerce-wiki/marketing-cloud-salesforce-send-email>

[5] <https://www.cu.edu/blog/ecommerce-wiki/organizing-your-work-ongoing-automation-studio-sends>