

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.

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

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

Send Email

Send GroupConnect

Verification

Wait

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

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

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

Send Email

Send GroupConnect

Verification

Wait

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

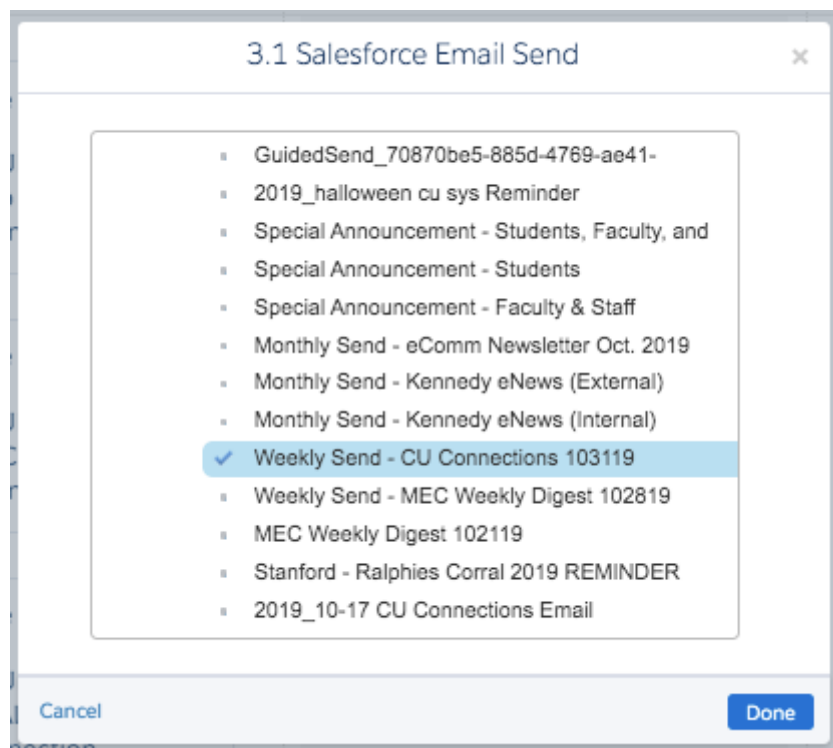
1.3 Import File

08 UREL OG DUAL Emp SUB Connection

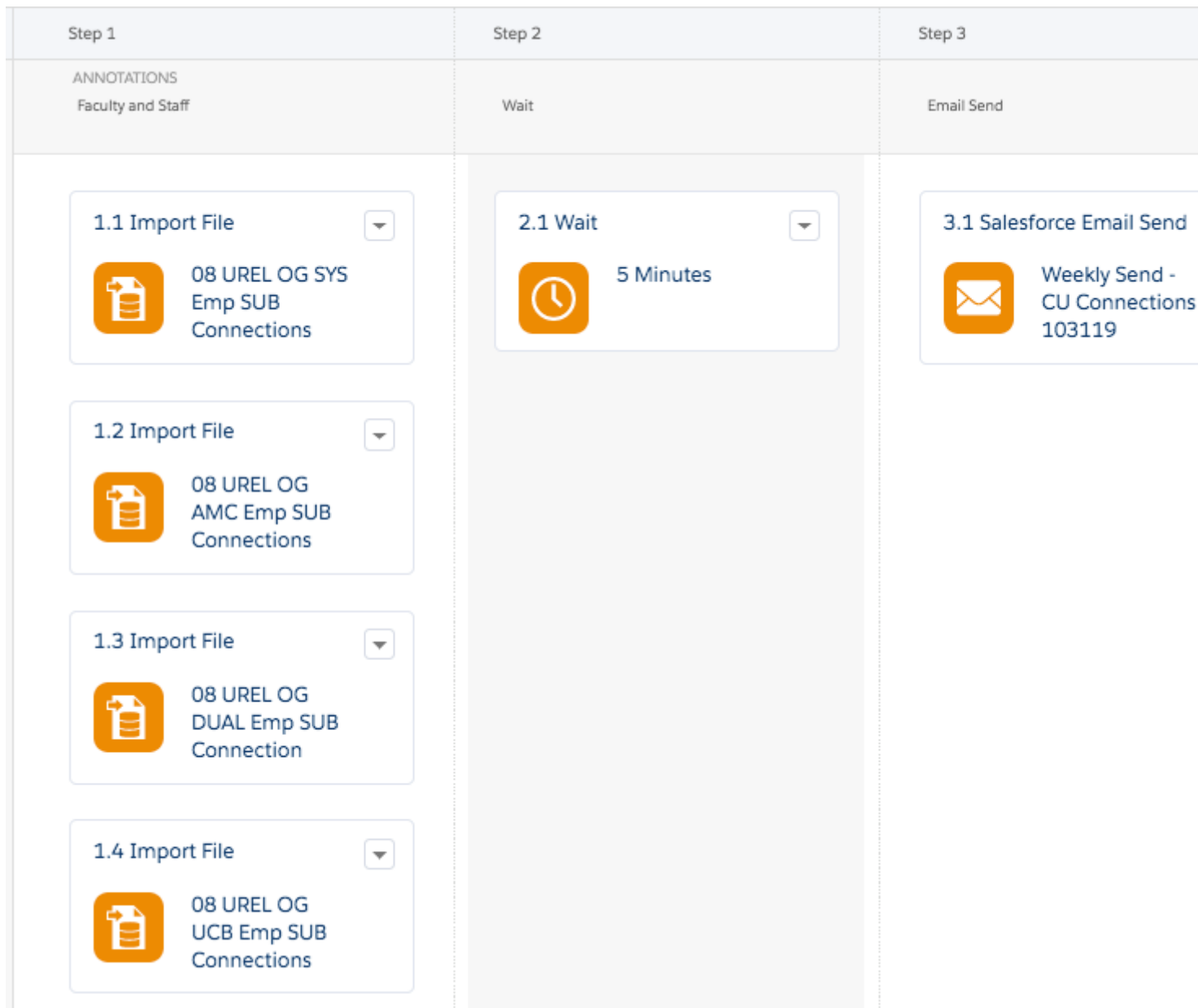
1.4 Import File

08 UREL OG UCB Emp SUB Connections

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

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

11/04/2019

at

6:00 AM

Time Zone

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

* Denotes this time zone honors daylight savings time

Repeat

None (run once) ▾

Clear Schedule

Cancel

Save

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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