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Send Marketing Cloud Emails [1]

January 11, 2024 by melanie.jones@cu.edu [2]

There are two ways to send emails through Marketing Cloud, Guided Send and Salesforce Send Emails. Guided Send has a sleeker interface but Salesforce Send Emails can be reused bringing efficiency and minimizing room for error.



GUIDED SEND

1 | Guided Send

Guided Send has a sleek interface and is the most intuitive sending method. New users are encouraged to leverage this route as they learn Marketing Cloud initially.

Guided Send Checklist | 2-Page Quick How-To [3]

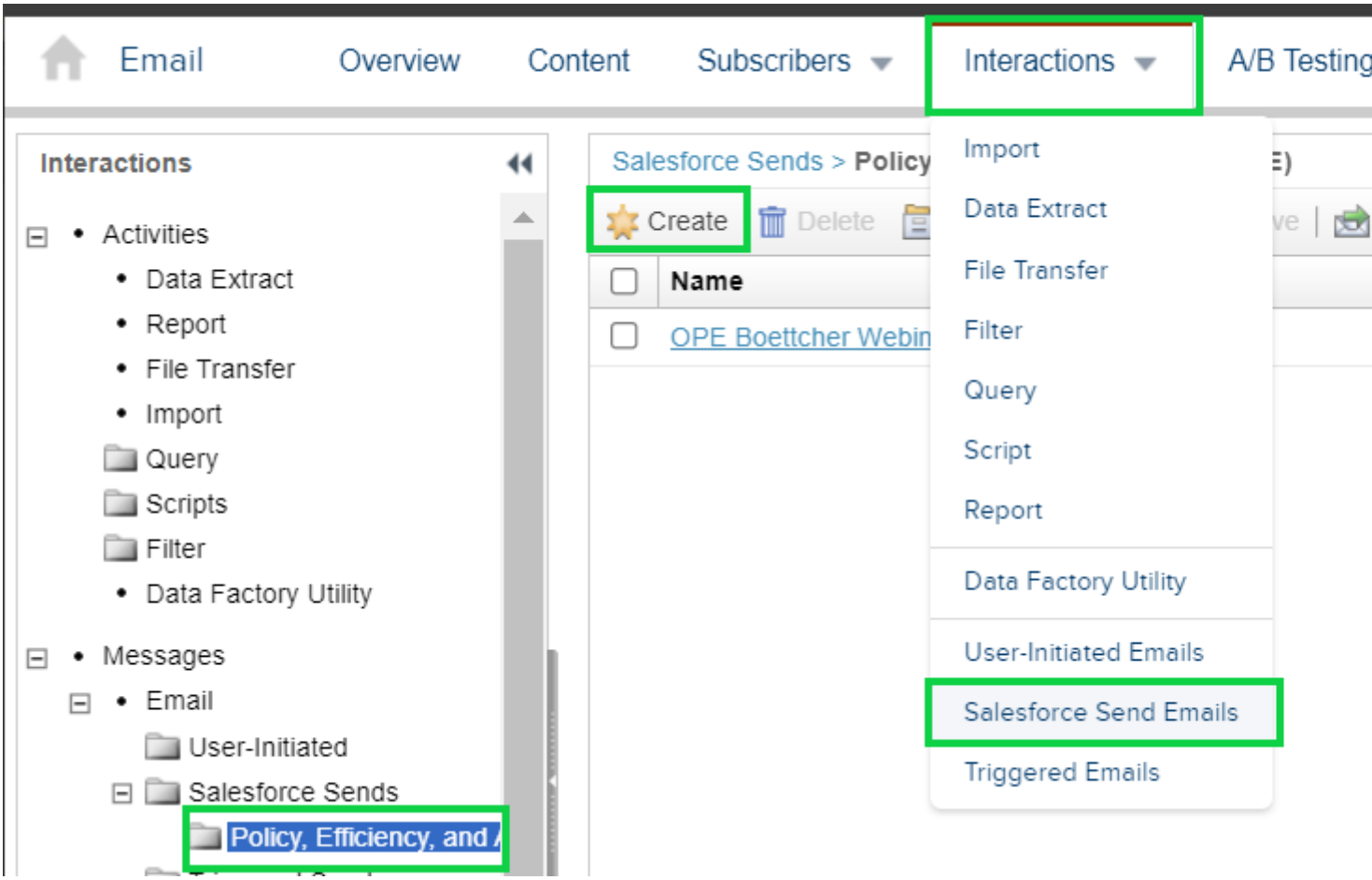
2 | Salesforce Send Emails

Salesforce Send Emails are the original method of sending emails, without the sleek interface. This method opens the door for efficiency and minimizes room for error. Users are encouraged to adapt to this method of sending as soon as possible.

- Create New
- Re-Use (recommended)

Navigate to Salesforce Send Emails

1. Hover **Email Studio** in the top left of the navigation >> click **Email** in the dropdown
2. Hover **Interactions** in the top navigation>> Select **Salesforce Send Emails >>** Click the **Create** button



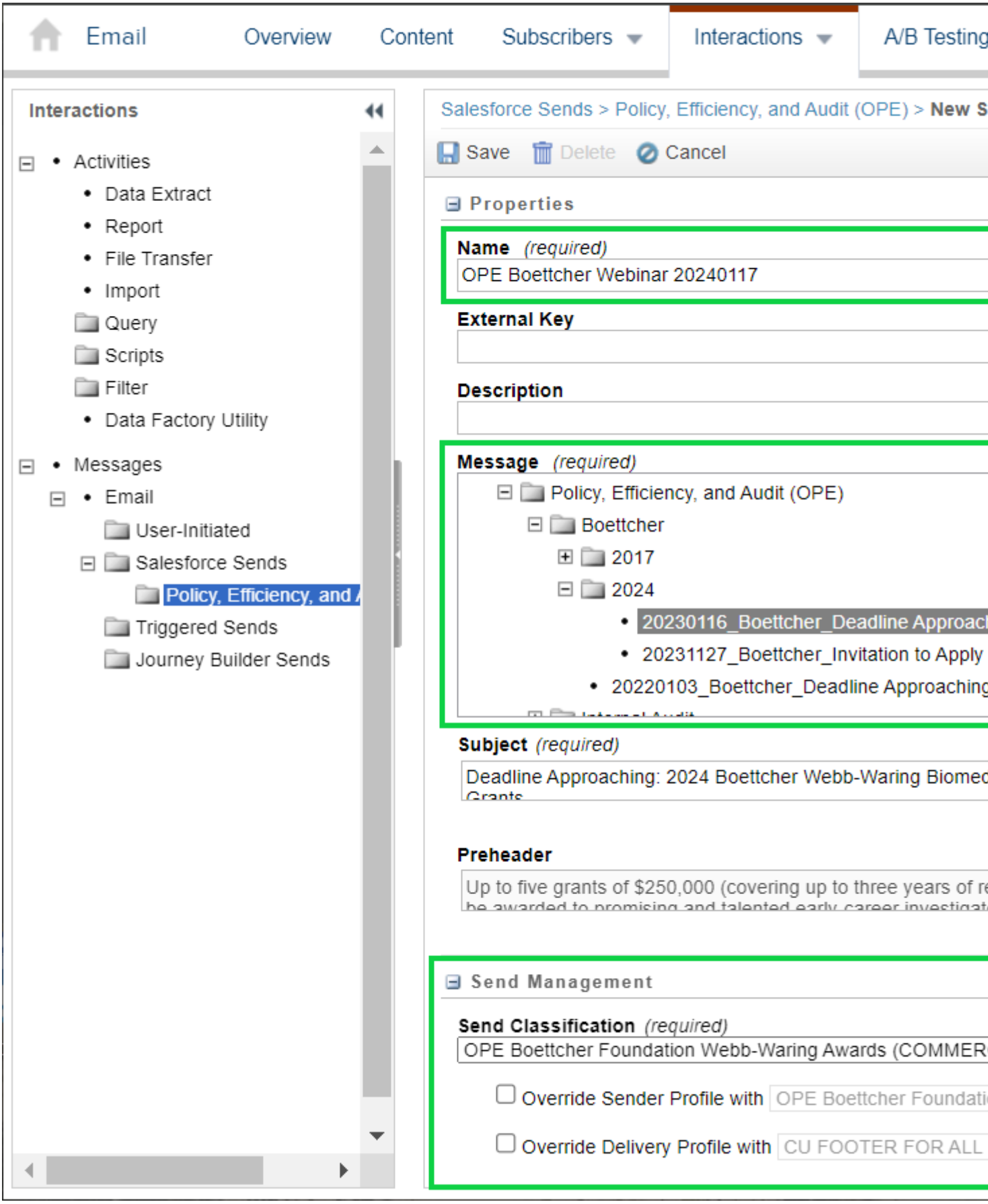
Create a Salesforce Send Email

Properties

1. Select the Create button at the top
    - **Name |** Provide your email with a descriptive name - this will only be seen by you.
    - **Message |** Select the message content you want to deliver
    - **Subject Line & Preheader |** Confirm you are happy with these two elements

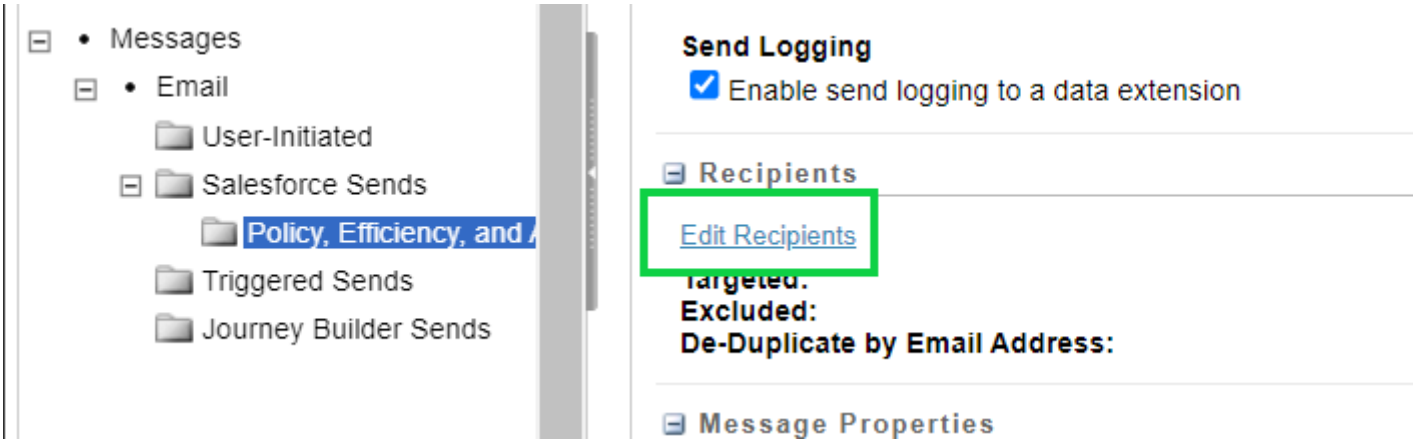
From Information or Send Management

1. **Send Classification |** A combination of the Sender Profile and Delivery Profile.
    - **Sender Profile |** The friendly name and email address your message comes from. This can be overwritten from what is automatically selected by the Send Classification.
    - **Delivery Profile Email |** Commercial emails use CU FOOTER FOR ALL EMAILS. Those with Transactional send needs will have an alternative Delivery Profile (and Send Classification).


Email
Overview
Content
Subscribers
Interactions
A/B Testing
Interactions
Activities
Data Extract
Report
File Transfer
Import
Query
Scripts
Filter
Data Factory Utility
Messages
Email
User-Initiated
Salesforce Sends
Policy, Efficiency, and A
Triggered Sends
Journey Builder Sends
Salesforce Sends > Policy, Efficiency, and Audit (OPE) > New S
Save
Delete
Cancel
Properties
Name (required)
OPE Boettcher Webinar 20240117
External Key
Description
Message (required)
Policy, Efficiency, and Audit (OPE)
Boettcher
2017
2024
20230116_Boettcher_Deadline Approaci
20231127_Boettcher_Invitation to Apply
20220103_Boettcher_Deadline Approaching
Subject (required)
Deadline Approaching: 2024 Boettcher Webb-Waring Biomed
Grants
Preheader
Up to five grants of $250,000 (covering up to three years of re
be awarded to promising and talented early career investigat
Send Management
Send Classification (required)
OPE Boettcher Foundation Webb-Waring Awards (COMMER
Override Sender Profile with
OPE Boettcher Foundati
Override Delivery Profile with
CU FOOTER FOR ALL

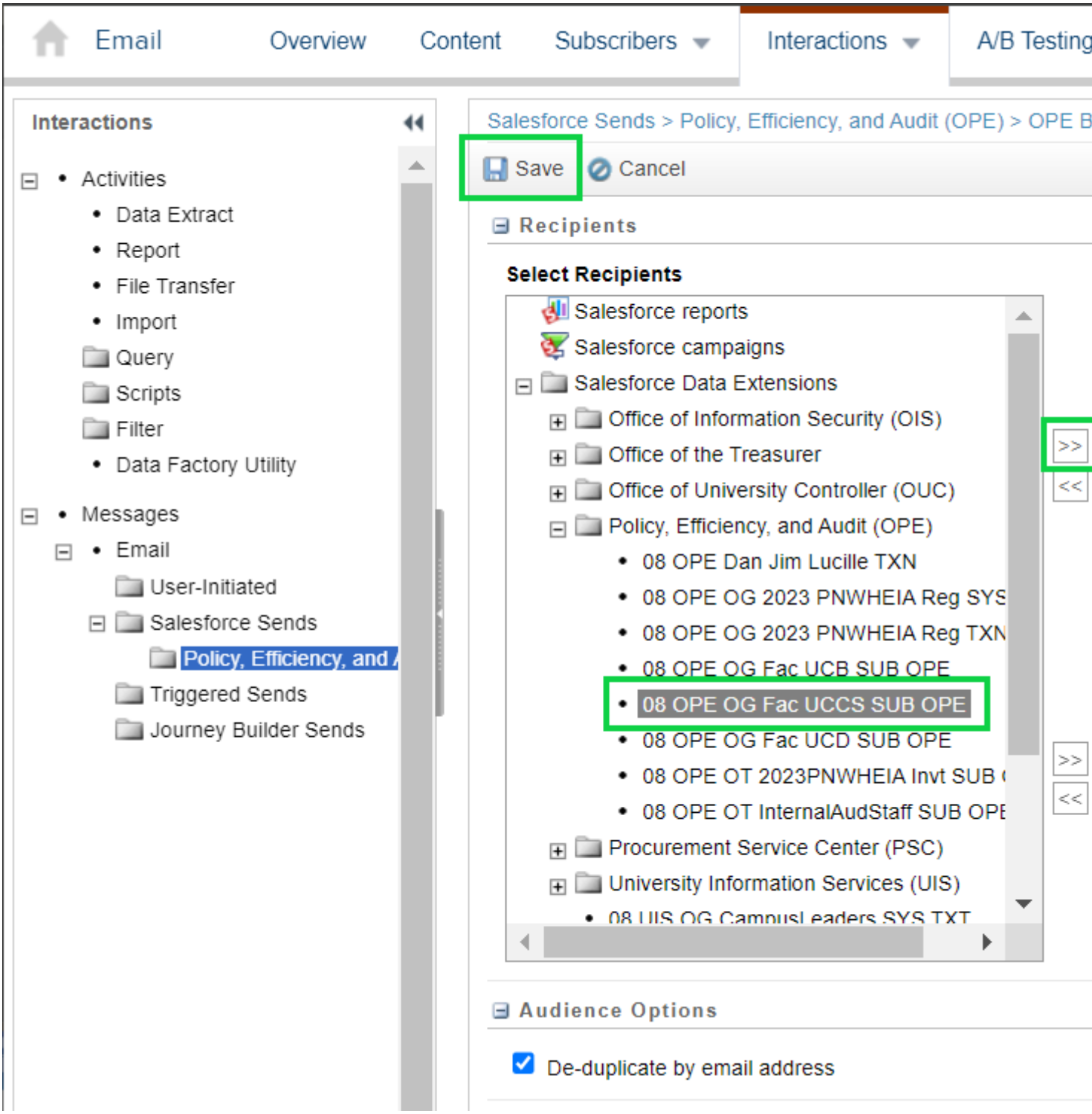
Recipients

Select **Edit Recipients**



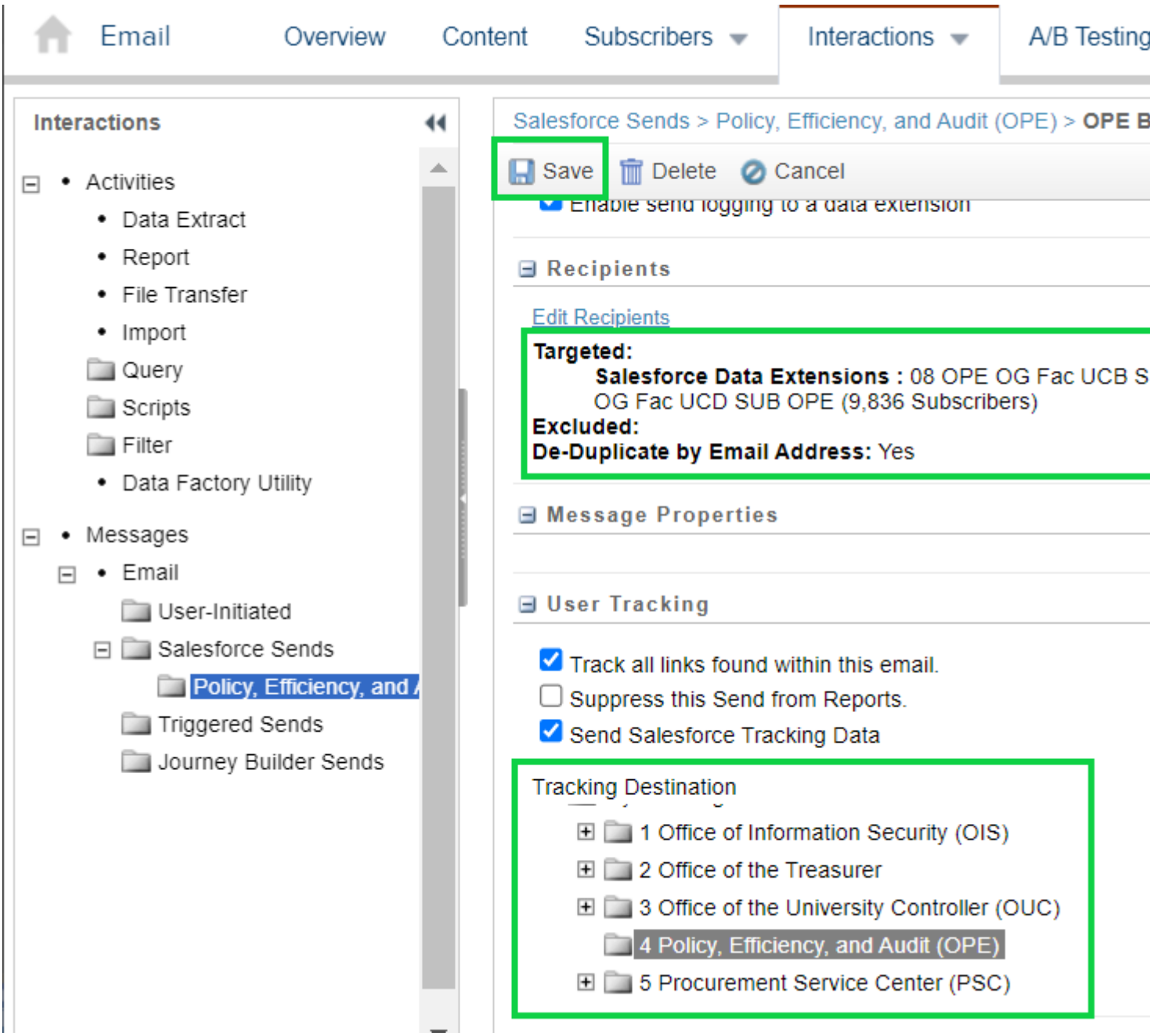
Select Recipients -

1. **Targeted**
    1. Your audience might be a Salesforce Report(s) or a Salesforce Data Extension(s). You will NEVER include a Campaign.
    2. You cannot combine Reports with Data Extensions.
    3. Read the name carefully. View your report(s) in Salesforce to see a full audience description.
2. **Excluded (optional) |** Audiences can be excluded from a send (based on Subscriber ID).
    1. If the Targeted audience includes Data Extensions, Data Extensions can be Excluded.
    2. If the Targeted audience includes Reports, Reports and/or Campaigns can be Excluded.
3. Select **Save** to confirm the audience(s) you selected



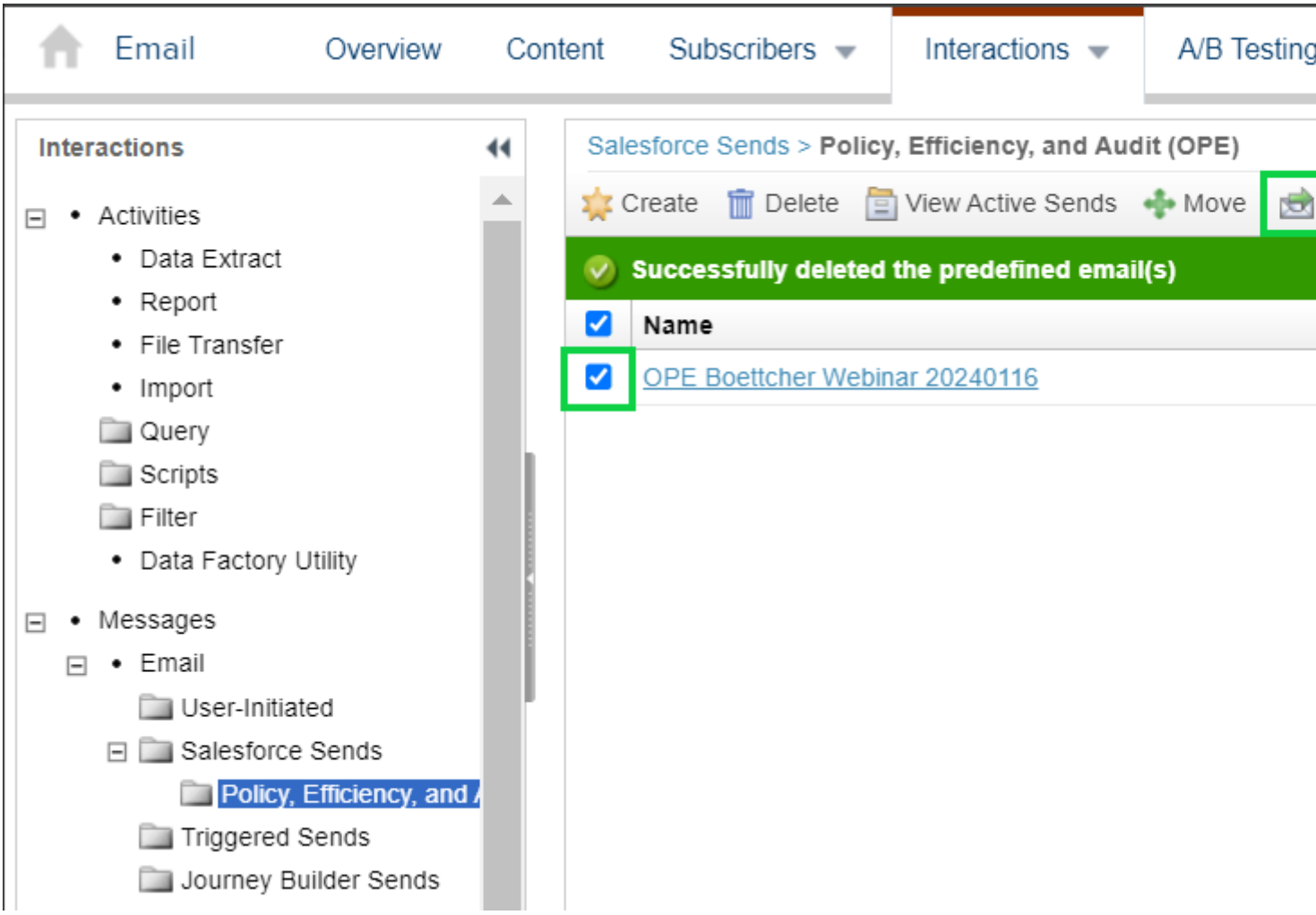
Save New Email Send

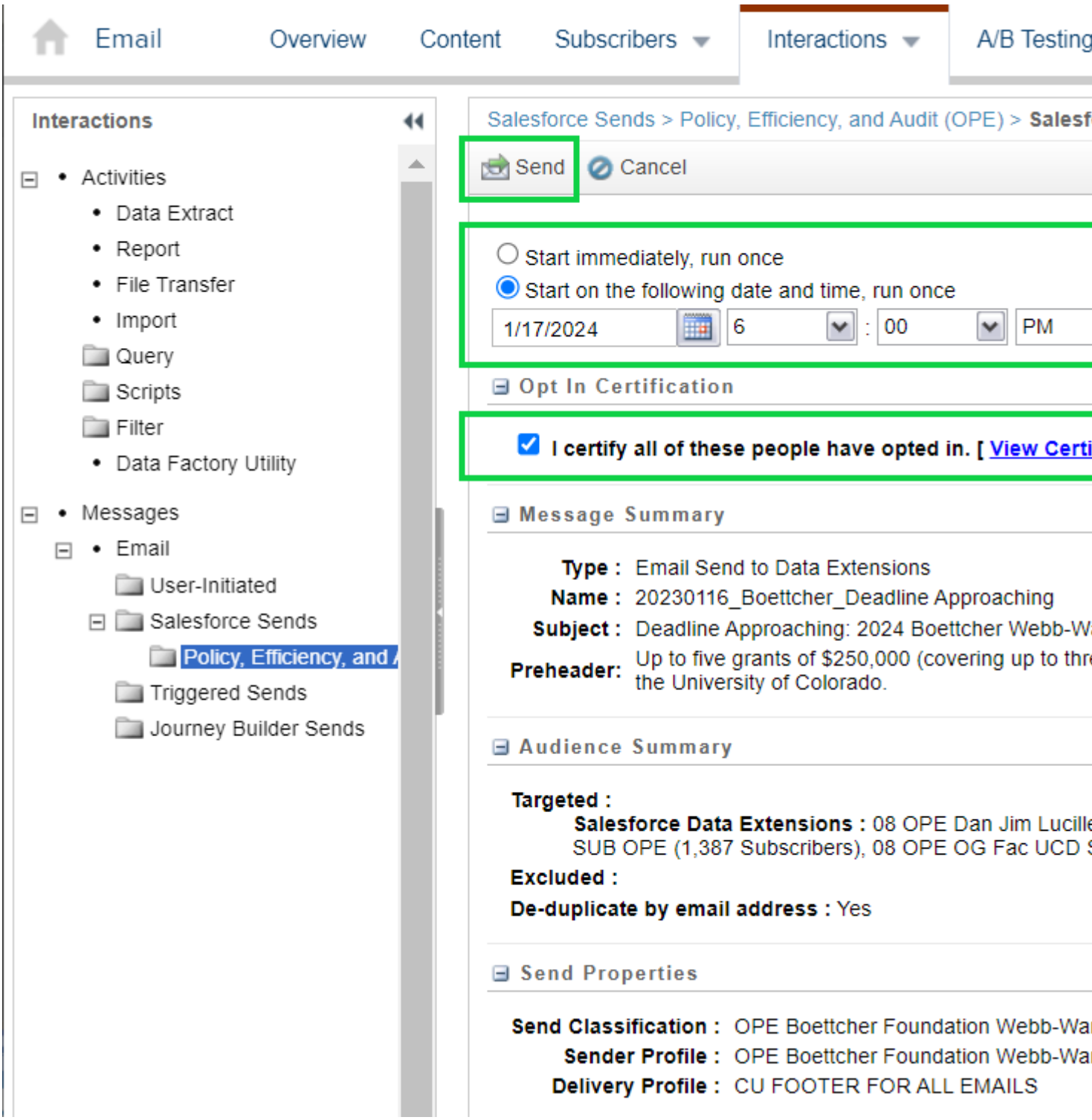
1. Confirm the recipients
2. Select the **Tracking Destination Folder**
3. Select **Save**



Send Email

1. **Check the box** next to the email send name
2. Select **Send Email**
3. A new window will appear.
    1. Please review all the information to confirm it is accurate.
    2. **Send or Schedule** when the email will be delivered to your audience
    3. **Check the box next to *'This Information is correct and this email is ready to send'.***
    4. Select **Send Email** across the top


Email
Overview
Content
Subscribers
Interactions
A/B Testing
Interactions
Activities
Data Extract
Report
File Transfer
Import
Query
Scripts
Filter
Data Factory Utility
Messages
Email
User-Initiated
Salesforce Sends
Policy, Efficiency, and A
Triggered Sends
Journey Builder Sends
Salesforce Sends > Policy, Efficiency, and Audit (OPE)
Create
Delete
View Active Sends
Move
Successfully deleted the predefined email(s)
Name
OPE Boettcher Webinar 20240116



Print Salesforce Send Tutorial [4]

For many Marketing Cloud users, sends are recurring meaning the email content will change, but other elements such as the audience, from information, tracking folder destination, and more remain the same. Re-using a send is efficient and minimizes room for error compared to a send created from scratch. Good candidates for re-using a send include a newsletter (any frequency), event invitations, updates/alerts, and more. Once identified review all the email

details to confirm the accuracy of the previous send, then:

1. **Rename the send**
2. **Select the new email content** (after being finalized).
3. Review the audiences. **If Data Extensions, successfully re-run them before sending the email**.
4. **Send/schedule Email**

Convert Previous Guided Send to Salesforce Send Email

- Rather than creating a Salesforce Send Email from scratch, use a Guided Send from before.
- Rename the send to something you and your team understand, rather than the random combination of characters it originally got.

3 & 4 | Automation Studio & Journey Builder

Automation Studio is a more robust function that can be used to execute a defined task, either manually or automatically on a regular cadence. Most often it's used to run Data Extensions in combination with Salesforce Send Emails. This advanced option is supported by an eComm specialist, only in cases that make sense.

- Scheduling Data Extension Imports in Automation Studio [5]
- Scheduling Salesforce Send Emails in Automation Studio [6]
- Organizing Your Work for Ongoing Automation Studio Sends [7]

If you have a series of emails that you've been able to send, it might be a good candidate for a Journey. Journeys require ample planning, finalized content well in advance, and a solid technical understanding to be successful.

- Journey Builder [8]

PROS	CONS

SALESFORCE SEND EMAILS	• Reuse a previous send to reduce the need to configure all send components at every send *(efficient and less risk for error)* • Name the email send as desired *(valuable for reporting & troubleshooting)* • Stay organized by placing email sends in folders • Option to CC or BCC individuals *(if enabled in Business Unit)*	• Less modern interface
GUIDED SEND	• Send via an intuative, step-by-step wizard which is easily navigated while creating an email	• Must configure send components for every send *(inefficient & increased room for error)* • Randomly named email send *(difficult to troubleshoot and creates reporting limitation)*

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[8] https://www.cu.edu/blog/ecomm-wiki/understanding-email-journeys