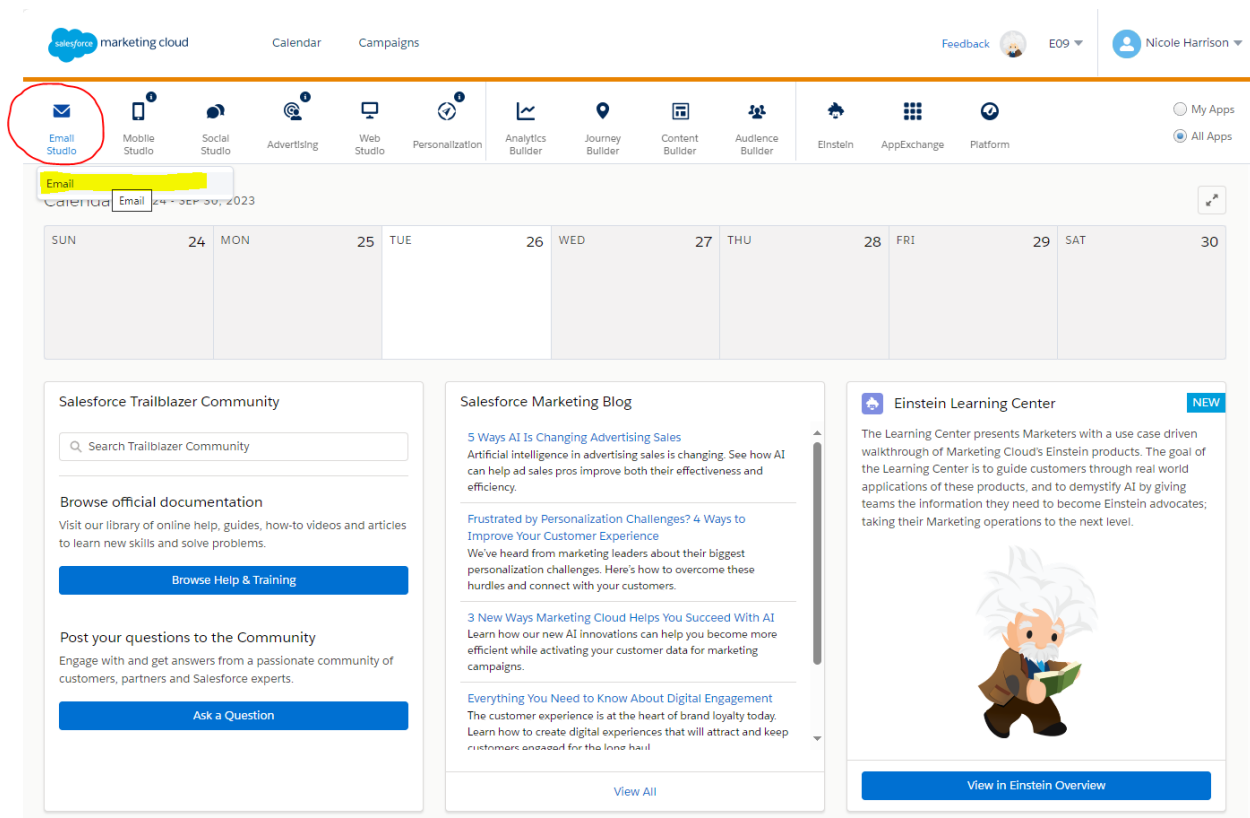
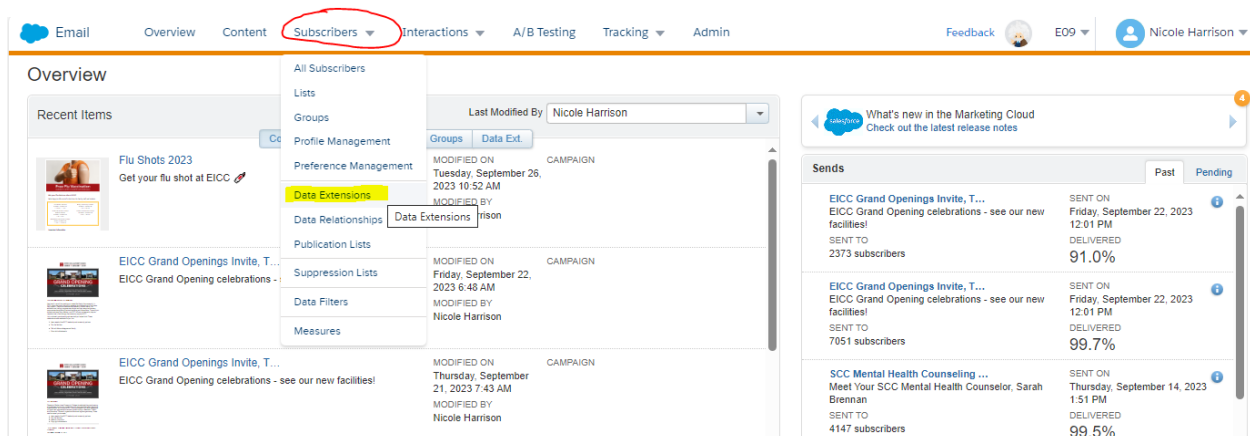


Salesforce Marketing Cloud | Setting up email lists

Step 1: Log in to Salesforce Marketing Cloud (<https://mc.exacttarget.com/cloud/#>), click on 'Email Studio' in the top ribbon and select 'Email' from the dropdown.



Step 2: Once in the 'Email' screen, click on 'Subscribers' in the navigation across the top of the page. In the dropdown select 'Data Extension'.



Step 3: Once on the 'Subscribers' tab you will need to click on the 'Data Extensions' section in the 'Subscribers' side navigation. Then expand the 'Data Extensions' folder and select your campuses 'Student Services' folder.

Please make sure to create and store all email lists in your campus specific folder.

EmailOverviewContentSubscribersInteractionsA/B TestingTracki

Subscribers

My Subscribers

- All Subscribers
- My Lists
- My Groups
- Publication Lists
- Suppression Lists

- Profile Management
- Preference Management

Data Extensions

- Data Extensions
 - Audiences
 - Clinton Student Services
- EICC Marketing
 - Muscatine Student Services
 - Scott Student Services
- My Data Relationships

Measures

Data Filters

- Campus Filters

Data Extensions

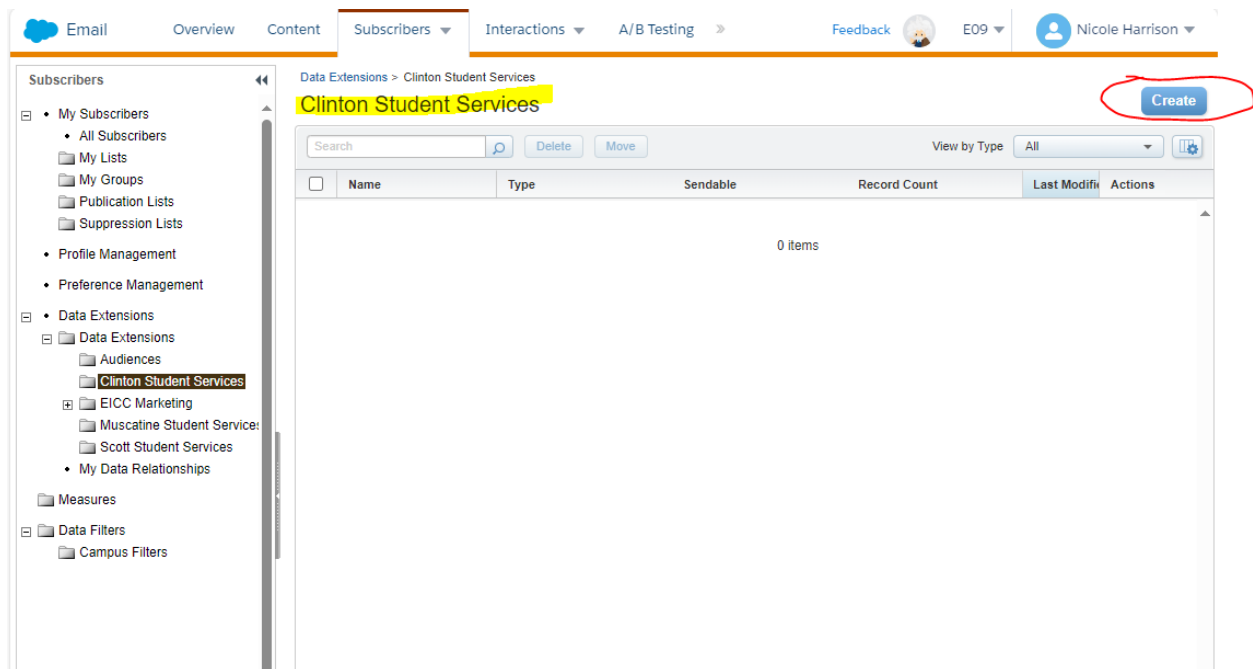
Search

Delete

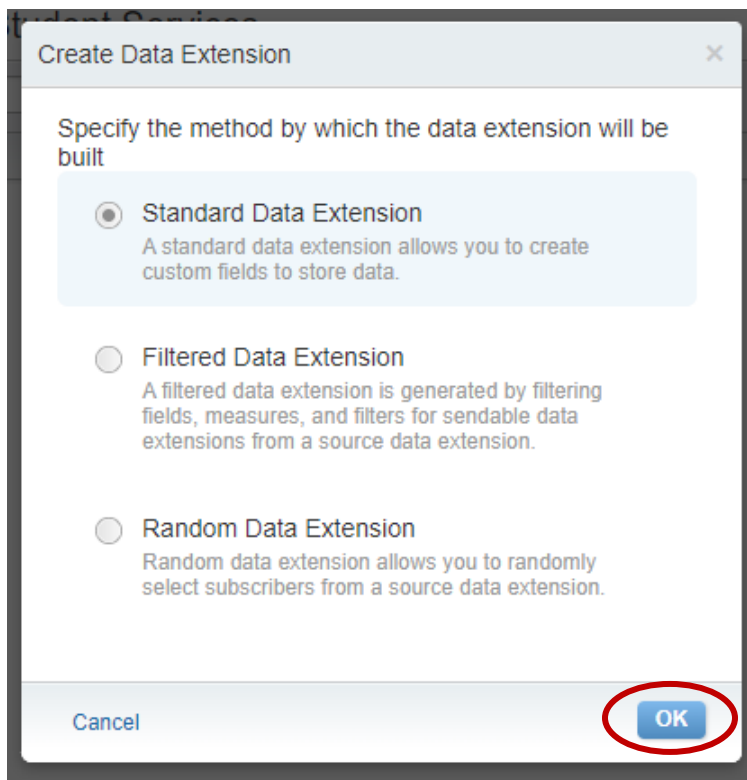
Move

☐	Name	Type	Sen
☐	IGO_PROFILES	Standard	No
☐	IGO_VIEWS	Standard	No
☐	IGO_PURCHASES	Standard	No
☐	IGO_PRODUCTS	Standard	No
☐	IGO_PRODUCTATTRIBS	Standard	No
☐	PI_CONTENTVIEWS	Standard	No
☐	PI_CONTENTATTRIBS	Standard	No
☐	PI_SESSIONS	Standard	No
☐	PI_CONTENT	Standard	No
☐	PI_ABANDONED_CART_EVENT	Standard	No
☐	PI_ABANDONED_CART_ITEMS	Standard	No
☐	PI_SESSION_ENDS	Standard	No
☐	Einstein_MC_Predictive_Scores	Standard	No
☐	Contacts without Channel Addresses	Standard	Yes
☐	EICC_HTML_Opportunity	Standard	No
☐	EICC_HTML_Emails	Standard	No
☐	Email1 and Email2 sends	Standard	No
☐	Email1 and Email2	Standard	No
☐	Contact Email Address 2	Standard	No
☐	EICC Mapping	Standard	No
☐	EICC_Contact_Mapping	Standard	No

Step 4: Once in your 'Student Services' folder, click the blue 'Create' button in the top right corner.



Step 5: A dialogue box will pop up to start creating your new 'Data Extension', which is your email list. Select 'Standard Data Extension' from the options and click 'OK' in the bottom right corner.



Step 6: This will bring you to the next screen in the process.

There are two fields to complete on this screen:

- Set the '**Name ***' field to a name that makes sense to you.
- Check the '**Is Sendable?**' box.

Then click the 'Next Button' in the bottom right corner.

Session Lists

Create New Data Extension

1 Properties 2 Data Retention Policy 3 Fields

Creation Method: Create from New

Name *

External Key

Description

Type: Standard

Location: ☐ Clinton Student Services [Change Location](#)

☐ Is Sendable?

☐ Is Testable?

[Cancel](#) [Next](#)

Session Lists

Create New Data Extension

1 Properties 2 Data Retention Policy 3 Fields

Creation Method: Create from New

Name *

External Key

Description

Type: Standard

Location: ☐ Clinton Student Services [Change Location](#)

☒ Is Sendable?

☐ Is Testable?

[Cancel](#) [Next](#)

Step 7: In the next screen of the process, there is nothing you need to change, so click the blue 'Next' button in the bottom right corner of the screen again.

Create New Data Extension

✓ Properties 2 Data Retention Policy 3 Fields

Retention Setting: On Off

Apply To

Delete:

- ☒ Individual Records
- ☐ All records and data extensions
- ☐ All records

Period:

- ☒ After Days
- ☐ Reset period on import
- ☐ on

Cancel Back Next

Step 8: The next screen of the process is setting up the structure of the Data Extension (email list).

Each row you set up on this screen will dictate the data contained in the row and it should match up with the columns in your email list.

Create New Data Extension

✓ Properties ✓ Data Retention Policy 3 Fields

Name	Data Type	Length	Primary Key	Nullable	Default Value
	Text	50	☐	☐	

Send Relationship: Subscriber Key relates to Subscribers on Subscriber Key

Cancel Back Create

Step 9: All your email lists must contain the student's **Student ID** number. This is their unique identifier in the system. You can leave the 'Data Type' and 'Length' at their default settings, but you must check the 'Primary Key' box.

You will also need to set up the following fields as well:

- **FirstName** - this specific spelling corresponds to being able to dynamically load the students first name into emails, the 'Data Type' and 'Length' fields can be left at their default settings.
- **Email** - this is the students email, you MUST set the 'Data Type' to 'EmailAddress' for the system to use it as the email address, all other options can be left at their default settings.

Create New Data Extension

✓ Properties ✓ Data Retention Policy 3 Fields

Name	Data Type ?	Length	Primary Key	Nullable	Default Value
STUDENT_ID	Text	50	☒	☐	
FirstName	Text	50	☐	☐	
LastName	Text	50	☐	☒	
Email	EmailAddress	254	☐	☐	

Send Relationship: STUDENT_ID relates to Subscribers on Subscriber Key

Cancel Back **Create**

You need to set the 'Send Relationship' dropdown at the bottom of the screen to the field that is set as your 'Primary Key', so the field name for where your student ID is held.

Then click the blue 'Create' button in the bottom right corner.

Step 10: After you click 'Create' you will be brought back to your folder, and you will see your new Data Extension. Click on the name of your new Data Extension to edit it.

The screenshot shows the Salesforce Marketing Cloud interface. The top navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', 'A/B Testing', 'Feedback', 'E09', and a user profile for 'Nicole Harrison'. The left sidebar shows a tree view of 'Subscribers' with categories like 'My Subscribers', 'Data Extensions', and 'Measures'. The main content area shows the 'Clinton Student Services' folder with a table of Data Extensions. A green success message at the top states: 'Success: Data Extension "Current Students" successfully created.' The table has columns: Name, Type, Sendable, Record Count, Last Modified Date, and Actions. The 'Current Students' extension is listed with a record count of 0 and a last modified date of Tuesday, September 26, 2023 11:55 AM.

Name	Type	Sendable	Record Count	Last Modified Date	Actions
Current Students	Standard	Yes	0	Tuesday, September 26, 2023 11:55 AM	[Edit] [Delete] [Move]

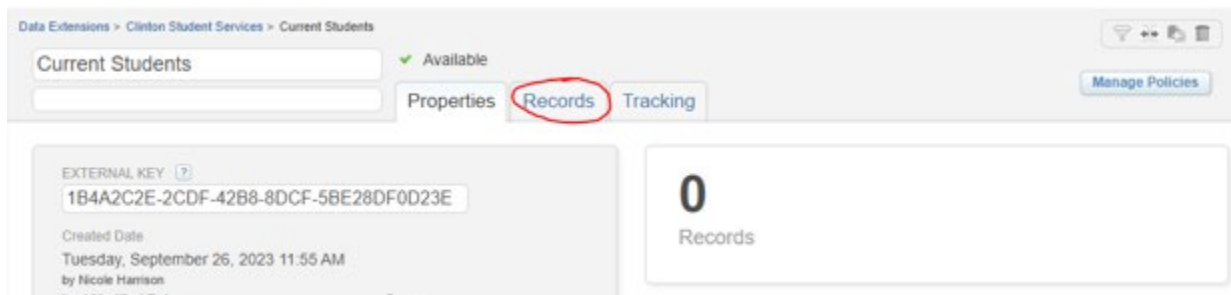
Step 11: This is what your Data Extension main screen will look like. In the left hand column with the gray background you will see the date the extension was created and last modified. You can see who created it, who owns it and in what folder it is stored. Below this you can see if the Data Extension is set to be used for sending or testing and you can edit those settings.

In the right column, you can see the fields in the Data Extension and there is an 'Edit Fields' button in the top corner of that section to make any changes.

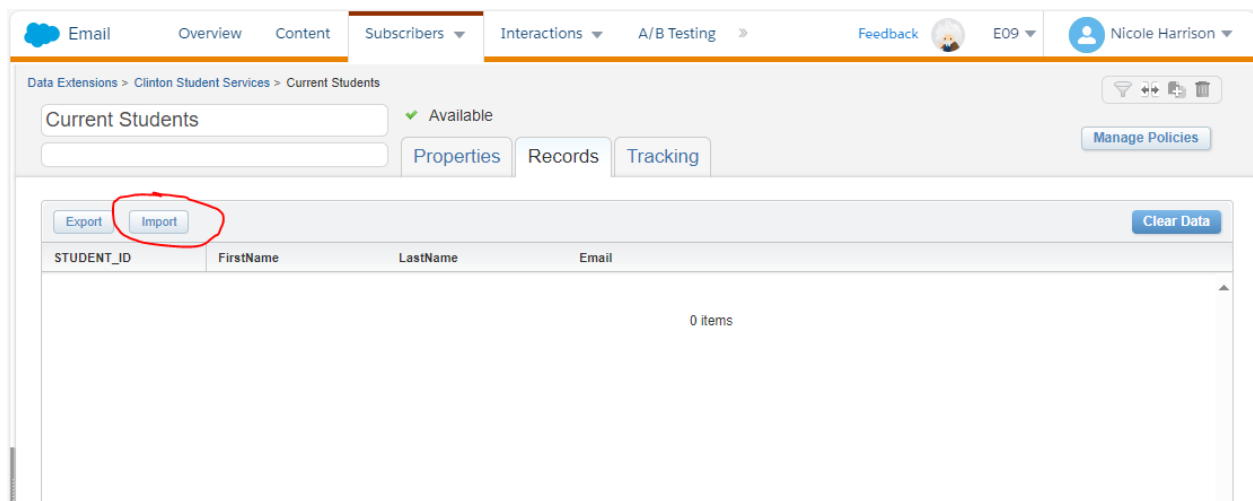
The screenshot shows the 'Current Students' Data Extension main screen. The top navigation bar includes 'Data Extensions > Clinton Student Services > Current Students'. The left sidebar shows the 'Current Students' Data Extension. The main content area has three tabs: 'Properties', 'Records', and 'Tracking'. The 'Records' tab is selected and circled in red. The 'Properties' tab shows the 'EXTERNAL KEY' as '1B4A2C2E-2CDF-42B8-8DCF-5BE28DF0D23E'. It also shows the 'Created Date' as 'Tuesday, September 26, 2023 11:55 AM' and the 'Last Modified Date' as 'Tuesday, September 26, 2023 11:55 AM'. The 'Owner' is 'Nicole Harrison'. The 'LOCATION' is 'Clinton Student Services'. The 'Type' is 'Standard'. There are two buttons: 'USED FOR SENDING' (Yes) and 'USED FOR TESTING' (No). The 'SUBSCRIBER RELATIONSHIP' is 'STUDENT_ID relates to Subscribers on Subscriber Key'. The 'Records' tab shows '0 Records'. The 'Fields' tab shows a table of fields with columns: Name, Data Type, Length, Primary Key, Nullable, and Default Value.

Name	Data Type	Length	Primary Key	Nullable	Default Value
STUDENT_ID	Text	50	☒	☐	
FirstName	Text	50	☐	☐	
LastName	Text	50	☐	☒	
Email	EmailAddress	254	☐	☐	

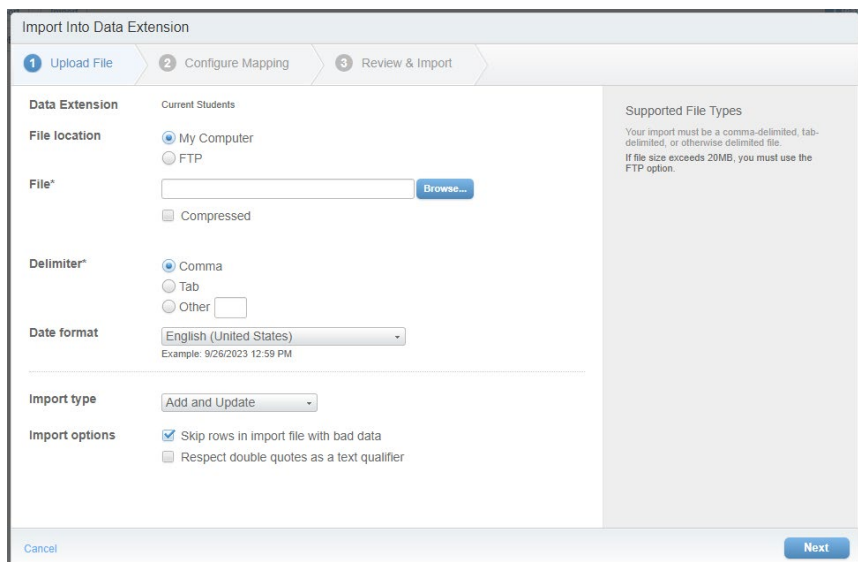
Step 12: To upload your email list into the data extension click on the 'Records' tab at the top.



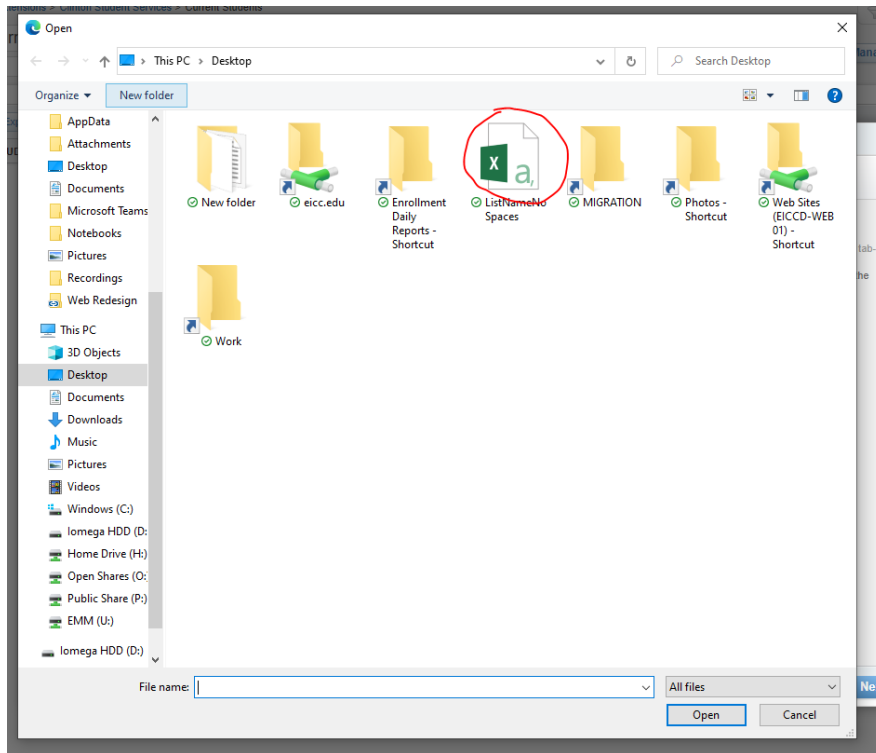
Step 13: Once in the 'Records' Tab, click the 'Import' button.



Step 14: This will open a new dialogue box. Click on the blue 'Browse' button at the end of the 'File *' field to select your formatted email list.

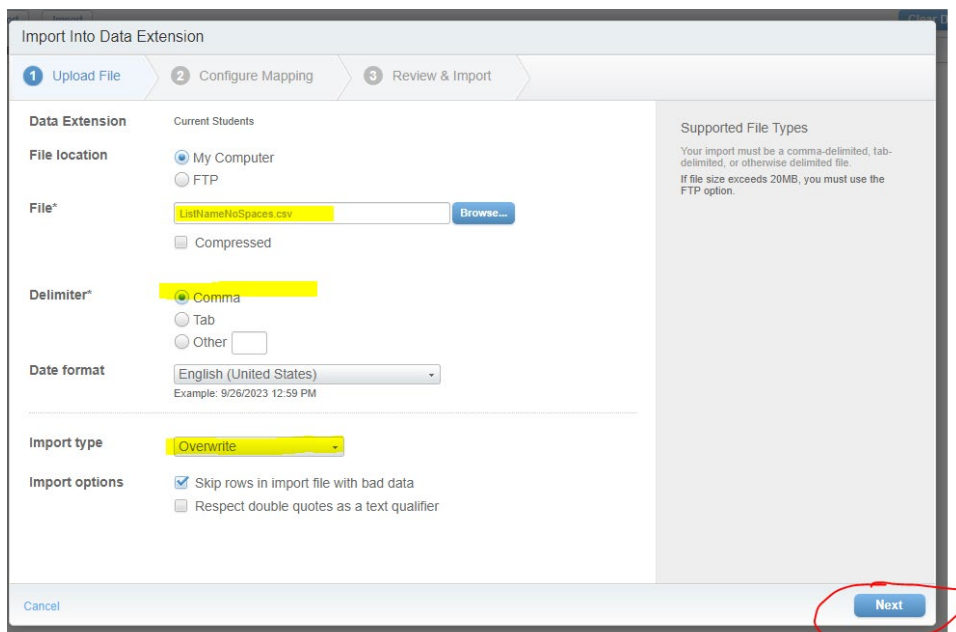


Step 15: In the pop-up window, navigate to your formatted CSV file and select it. Then click 'Open' to upload.



Step 16: Next set the '**Delimiter ***' field to '**Comma**' and set the '**Import Type**' to '**Overwrite**'. Setting the '**Import Type**' to '**Overwrite**' is especially important if you are just uploading a new version of the email list to an already existing Data Extension.

Then click on the blue '**Next**' button in the bottom right corner.



Step 17: This will move you on to 'Configure Mapping'.

If your spreadsheet column names match up with the Data Extension fields they will automatically map. If they do not, select the 'Map Manually' radio button in the options across the top.

Import Into Data Extension

1 Upload File 2 Configure Mapping 3 Review & Import

☒ Map by Header Row ☐ Map by Ordinal ☒ Map Manually

"ListNameNoSpaces.csv"	Data Extension Columns
Required	
STUDENT_ID	STUDENT_ID (Text)
FirstName2	FirstName (Text)
Email	Email (Email)
Optional	
LastName	LastName (Text)

Cancel Back Next

ListNameNoSpaces.csv
Rows: 893
Columns: 4
Size: 43.21 KB

This will change the first column to dropdown fields and you can select the spreadsheet column name that corresponds to the data for the Data Extension field.

Import Into Data Extension

1 Upload File 2 Configure Mapping 3 Review & Import

☐ Map by Header Row ☐ Map by Ordinal ☒ Map Manually

"ListNameNoSpaces.csv"	Data Extension Columns
Required	
STUDENT_ID	STUDENT_ID (Text)
FirstName2	FirstName (Text)
None Assigned	Email (Email)
Optional	
LastName	LastName (Text)

Cancel Back Next

ListNameNoSpaces.csv
Rows: 893
Columns: 4
Size: 43.21 KB

Import Into Data Extension

1 Upload File 2 **Configure Mapping** 3 Review & Import

☐ Map by Header Row
 ☐ Map by Ordinal
 ☒ Map Manually

"ListNameNoSpaces.csv"	Data Extension Columns
Required	
STUDENT_ID	STUDENT_ID (Text)
FirstName2	FirstName (Text)
EMAIL	Email (Email)
Optional	
LastName	LastName (Text)

ListNameNoSpaces.csv
Rows: 893
Columns: 4
Size: 43.21 KB

Cancel Back **Next**

All required Data Extension fields MUST BE MAPPED to a column in your spreadsheet, any 'Optional' field in the Data Extension of any unneeded column from the spreadsheet can be left blank and the data will not be imported.

Once all of the fields are mapped click on the blue 'Next' button in the bottom corner.

Step 18: This will bring you to the last section of the import dialogue box. All you need to do here is double-check your email is in the 'Email Address' field on the right side and then click the blue 'Import' button in the bottom right corner.

Import Into Data Extension

1 Upload File 2 Configure Mapping 3 **Review & Import**

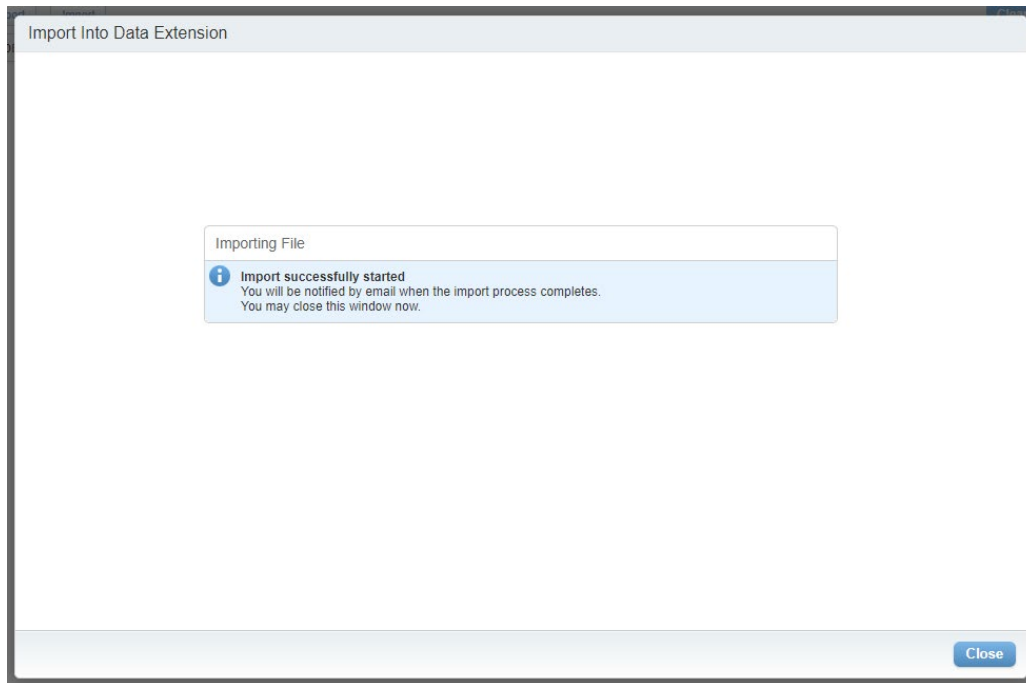
Data Extension	Current Students
File	ListNameNoSpaces.csv
Delimiter	Comma separated values
Date format	English (United States)
Import type	
Overwrite	
Import options	
Skip rows in import file with bad data	
Do not Respect double quotes as a text qualifier	
Mapping	Map Manually

Notifications
We will send an email when the import completes.

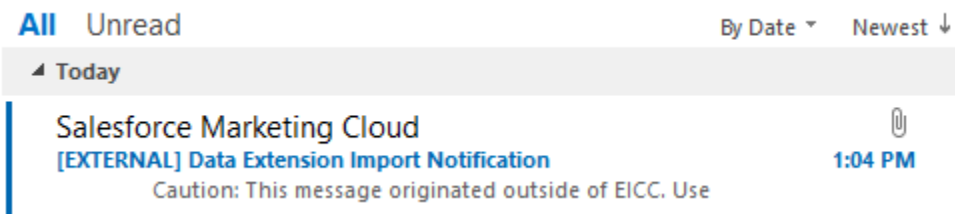
Email Address*
nharrison@ecc.edu

Cancel Back **Import**

Step 19: This will bring you to a screen with an 'Import successfully started' message. You can click the blue 'Close' button in the bottom right corner.



Step 20: Once the import is complete, you will receive an email in your inbox that looks like this.



If there were any errors in the upload the email will have an attachment with that information, the body of the email will tell you how many rows were inserted and how many validation errors there were.

Tue 9/26/2023 1:04 PM

Salesforce Marketing Cloud <noreply@mc.salesforce.com>
[EXTERNAL] Data Extension Import Notification

To: Harrison, Nicole

26e757a8-31e5-1800-0e49-9c051e961645 Results 202309261403.txt
732 bytes

Caution: This message originated outside of EICC. Use additional caution with links and attachments.

To view this email as a web page, go [here](#), [here](#).

The following import has completed with validation errors Tuesday, September 26, 2023 2:04:08 PM GMT-5

Name: e1aa712a-df28-a44d-ea82-8e9ff08dad14
Description: Import to Current Students from ListNameNoSpaces.csv file content.
External Key: 26e757a8-31e5-1800-0e49-9c051e961645
Source: ListNameNoSpaces_290b75d6-2c83-417e-b0c1-ecf604426ba6.csv
Destination: Current Students

Results:
Inserted: 891

ValidationErrors:
Required Field: 2

Validation results have been logged to a delimited text file and attached to this message.

MID 10488104

This email was sent to: nharrison@eicc.edu

If there are validation errors the email attachment will give you the Row Number and the error code. The following shows that rows 301 and 468 are both missing the required email field. You can then go into your CSV file and check those rows, correct any errors and then you can go through the import process again with the corrected file.

26e757a8-31e5-1800-0e49-9c051e961645 Results 202309261403 - Notepad

Row Number	Error Number	Error Code	Error Details	Row Data
301	8975647799	RequiredField	Email	
468	8975647800	RequiredField	Email	

Step 21: Once the file is imported and processed this is what your Data Extension screen will look like. It will add the number of records and the last import date to the top of the right column.

Data Extensions > Clinton Student Services > Current Students

Current Students

Available

Manage Policies

Properties

Records

EXTERNAL KEY ?

1B4A2C2E-2CDF-42B8-8DCF-5BE28DF0D23E

Created Date
Tuesday, September 26, 2023 11:55 AM
by Nicole Harrison

Last Modified Date
Tuesday, September 26, 2023 11:55 AM
by Nicole Harrison

Owner
Nicole Harrison [Edit](#)

LOCATION
☐ Clinton Student Services [Change](#)

Type:
Standard

USED FOR SENDING
Yes

USED FOR TESTING
No

[Edit](#)

SUBSCRIBER RELATIONSHIP
STUDENT_ID relates to Subscribers on Subscriber Key

891

DATE LAST IMPORTED
Tuesday, September 26, 2023 2:04 PM
by Nicole Harrison

Records

Fields

[Edit Fields](#)

Name	Data Type	Length	Primary Key	Nullable	Default Value
STUDENT_ID	Text	50	☒	☐	
FirstName	Text	50	☐	☐	
LastName	Text	50	☐	☒	
Email	EmailAddress	254	☐	☐	