

Salesforce Marketing Cloud | Set up an email

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.

The screenshot shows the Salesforce Marketing Cloud interface. The top navigation bar includes 'marketing cloud', 'Calendar', 'Campaigns', 'Feedback', 'E09', and a user profile for 'Nicole Harrison'. Below this is a ribbon with various tools: 'Email Studio' (highlighted with a red circle), 'Mobile Studio', 'Social Studio', 'Advertising', 'Web Studio', 'Personalization', 'Analytics Builder', 'Journey Builder', 'Content Builder', 'Audience Builder', 'Einstein', 'AppExchange', and 'Platform'. A dropdown menu for 'Email' is open, showing 'Email' and 'Calendar'. Below the ribbon is a calendar view for September 2023. The main content area features three panels: 'Salesforce Trailblazer Community' with a search bar and buttons for 'Browse Help & Training' and 'Ask a Question'; 'Salesforce Marketing Blog' with several article links; and 'Einstein Learning Center' with a 'View in Einstein Overview' button.

Step 2: Click on the 'Content' tab across the top of the page.

The screenshot shows the Salesforce Marketing Cloud interface with the 'Content' tab selected in the top ribbon. The main content area is titled 'Overview' and features a 'Recent Items' section with a table of email campaigns. The table has columns for 'Content Builder Emails', 'Lists', 'Groups', and 'Data Ext.'. The campaigns listed are 'Flu Shots 2023', 'EICC Grand Openings Invite, T...', 'EICC Grand Openings Invite, T...', 'EICC Grand Openings Invite, T...', and 'EICC Grand Openings Invite, T...'. Each row shows the campaign name, a thumbnail image, the modification date and time, and the user 'Nicole Harrison'. To the right of the 'Recent Items' section is a 'Sends' section with a table of email sends. The table has columns for 'Sends', 'Past', and 'Pending'. The sends listed are 'EICC Grand Openings Invite, T...', 'EICC Grand Openings Invite, T...', 'SCC Mental Health Counseling ...', and 'Casting Email #4, Current Stu...'. Each row shows the send name, the send date and time, the number of subscribers, and the delivery percentage.

Content Builder Emails	Lists	Groups	Data Ext.
	Flu Shots 2023 Get your flu shot at EICC	MODIFIED ON Tuesday, September 26, 2023 10:52 AM MODIFIED BY Nicole Harrison	CAMPAIGN
	EICC Grand Openings Invite, T... EICC Grand Opening celebrations - see our new facilities!	MODIFIED ON Friday, September 22, 2023 6:48 AM MODIFIED BY Nicole Harrison	CAMPAIGN
	EICC Grand Openings Invite, T... EICC Grand Opening celebrations - see our new facilities!	MODIFIED ON Thursday, September 21, 2023 7:43 AM MODIFIED BY Nicole Harrison	CAMPAIGN
	EICC Grand Openings Invite, T... EICC Grand Opening celebrations - see our new facilities!	MODIFIED ON Thursday, September 21, 2023 7:43 AM MODIFIED BY Nicole Harrison	CAMPAIGN

Sends	Past	Pending
EICC Grand Openings Invite, T... EICC Grand Opening celebrations - see our new facilities! SENT TO 2373 subscribers	SENT ON Friday, September 22, 2023 12:01 PM DELIVERED 91.0%	
EICC Grand Openings Invite, T... EICC Grand Opening celebrations - see our new facilities! SENT TO 7051 subscribers	SENT ON Friday, September 22, 2023 12:01 PM DELIVERED 99.7%	
SCC Mental Health Counseling ... Meet Your SCC Mental Health Counselor, Sarah Brennan SENT TO 4147 subscribers	SENT ON Thursday, September 14, 2023 1:51 PM DELIVERED 99.5%	
Casting Email #4, Current Stu... Casting Call! Audition for EICC's	SENT ON Friday, September 01,	

Step 3: In the Content screen click the arrow next to 'Content Builder' in the left column. Once the Content Builder section is open you will see a 'Student Services' folder for your specific campus. Click the arrow to expand this section.

The screenshot shows the 'Content Builder' interface for campus 'E09'. The left sidebar shows a tree view with 'Content Builder' expanded, revealing a folder for 'Clinton Student Services' which is also expanded. The main area displays a list of content items for 'Clinton Student Services'.

NAME	LOCATION	TYPE	CUSTOMER KEY
Flu Shots 2023 Get your flu shot at EICC	Current	Template-Based Email	101007be-bdbf-4...
EmailHeader-FluShot2023.png	Images	Image	ae965088-3b8c-4...
EICC Grand Openings Invite, Target FACULTY STAFF EICC Grand Opening celebrations - see our new...	2023	Template-Based Email	2c6101f7-7ae8-4...
EICC Grand Openings Invite, Target EXTERNAL EICC Grand Opening celebrations - see our new...	2023	Template-Based Email	00264a15-c6b7-4...
EICC Grand Openings Invite, Target CURRENT STUDENTS EICC Grand Opening celebrations - see our new...	2023	Template-Based Email	d30b0dd1-feb7-4...
EmailHeader-GrandOpenings-Center.png	Content Builder	Image	54e2ae7b-6652-4...

A folder for 'Images', '2023 Fall Emails', and '2024 Fall Emails' has been set up under each college. Please use these folders moving forward to organize your emails and any images you upload for emails.

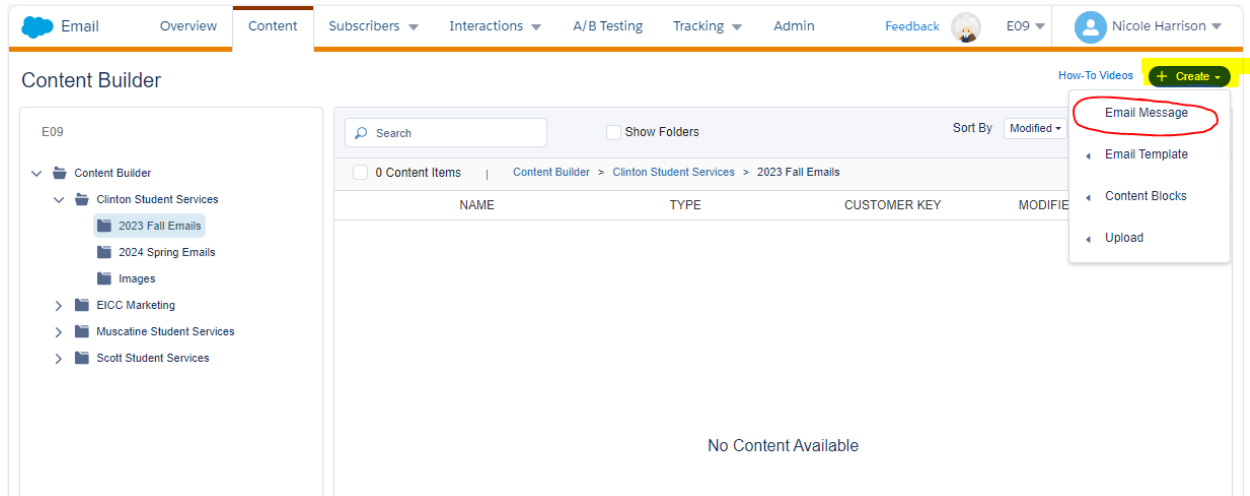
You can add more folders by right clicking on the folder name you want to add a subfolder to.

The screenshot shows the 'Content Builder' interface for campus 'E09'. The left sidebar shows a tree view with 'Content Builder' expanded, revealing a folder for 'Clinton Student Services' which is also expanded. Under 'Clinton Student Services', there are three subfolders: '2023 Fall Emails', '2024 Spring Emails', and 'Images'. The main area displays a list of content items for 'Clinton Student Services'.

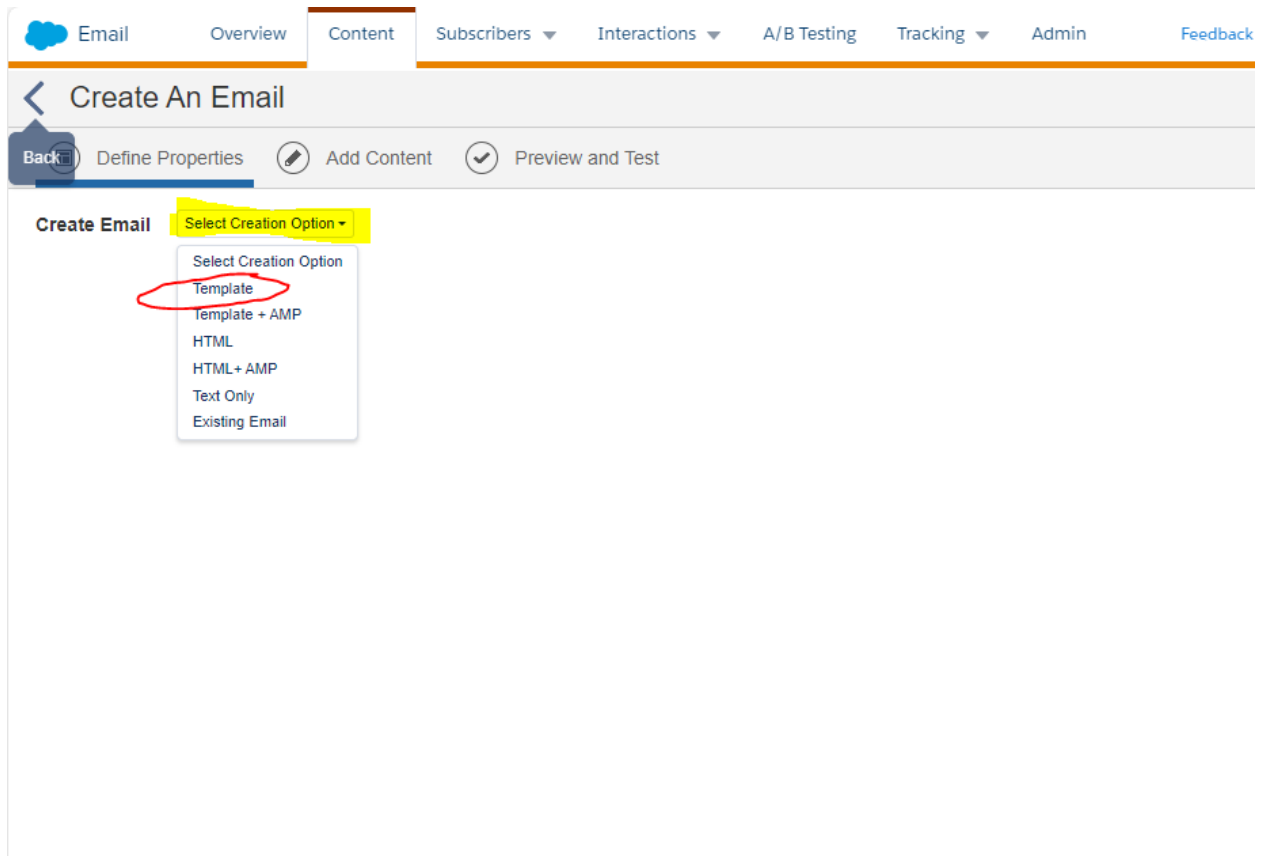
NAME	TYPE	CUSTOMER KEY	MODIFIED
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No Content Available

Step 4: Once you navigate into the appropriate folder, click on the blue 'Create' button in the top right corner, select 'Email Message' from the dropdown.

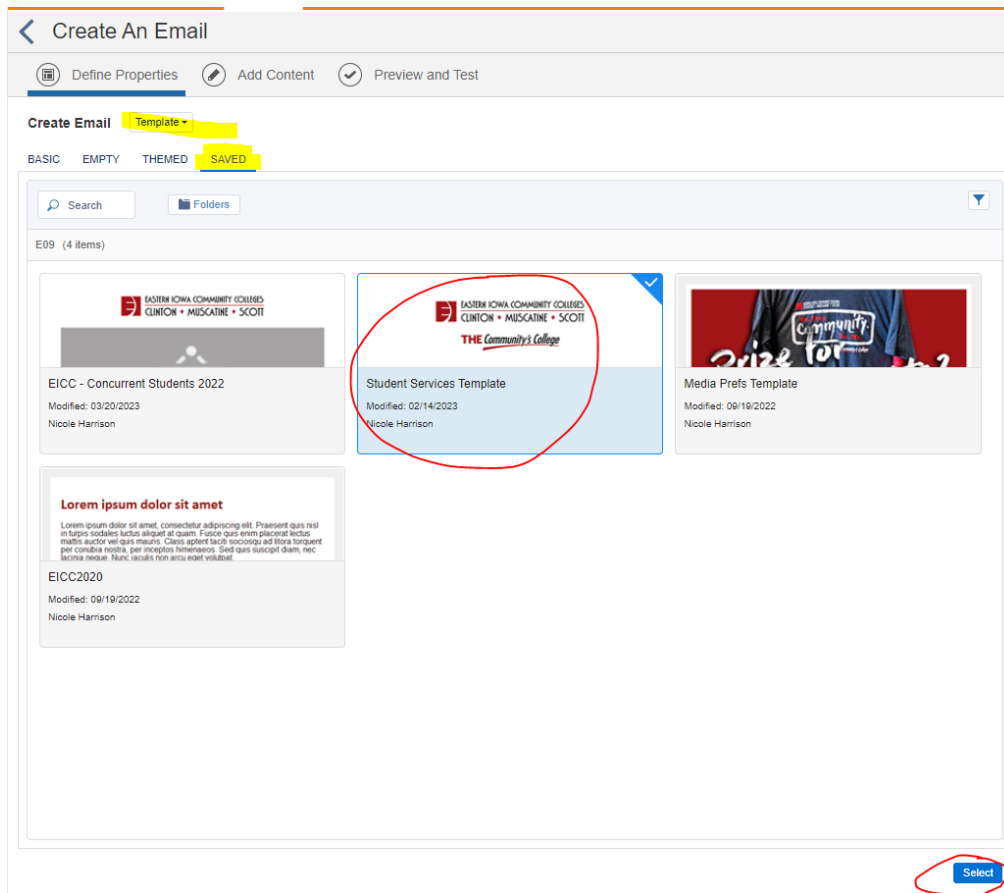


Step 5: The 'Create An Email' screen will load at the 'Define Properties' tab. Click on the 'Select Creation Option' dropdown and select 'Template'.



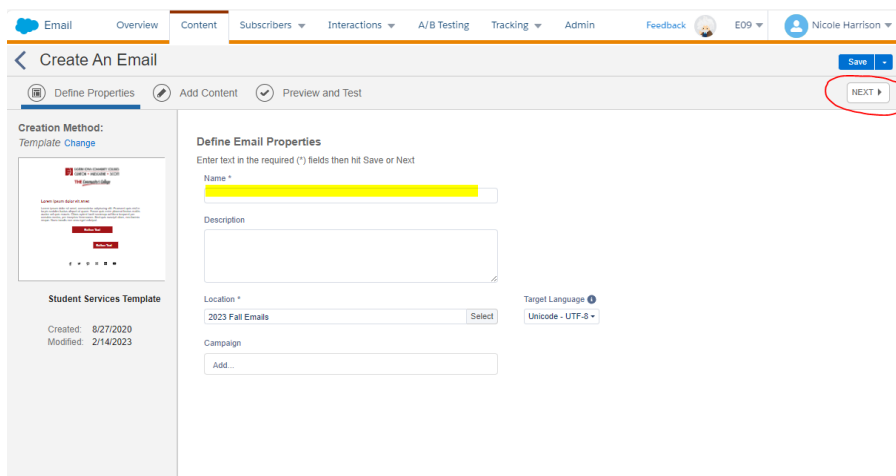
Step 6: All template options will load in. Please go to the 'SAVED' tab and select the 'Student Services Template' from the options.

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



Step 7: This will apply the template and bring you to the 'Define Email Properties' screen. You must fill in the 'Name', please name the email something meaningful containing the topic and send date.

Then click the white 'NEXT' button at the top right of the screen.



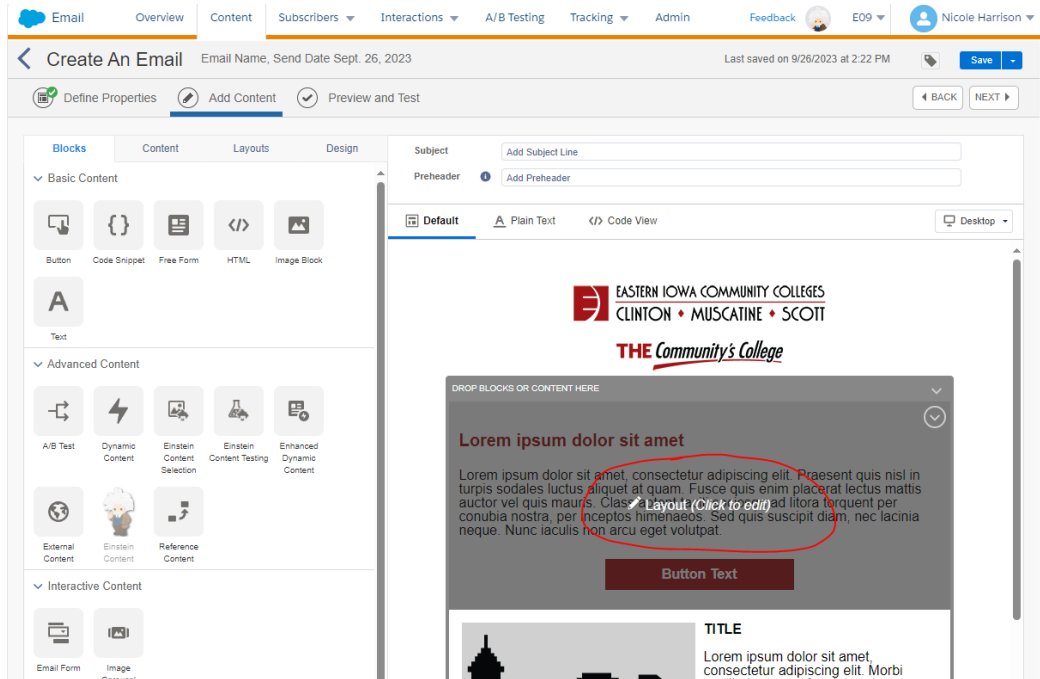
Step 8: The email will now load in for you to edit.

First - set the 'Subject' field, this field is the Email Subject Line that will show up for students.

Second - set the 'Preheader' field, this field sets the text from the email body that shows below the Subject Line in email clients.

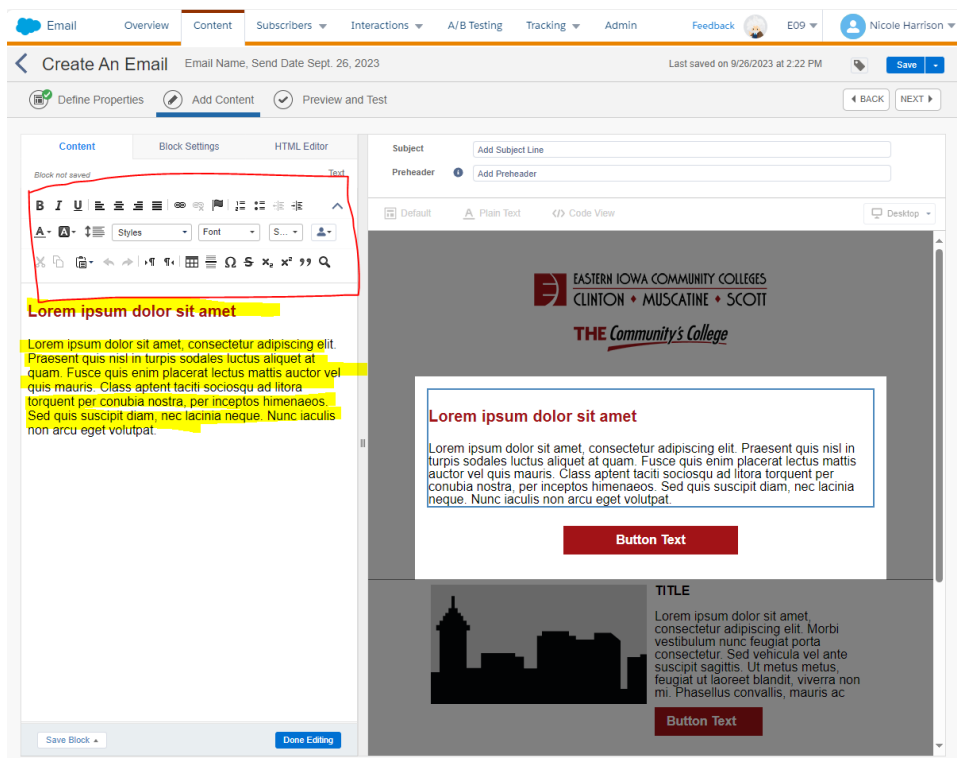
The screenshot displays the 'Create An Email' interface. The top navigation bar includes tabs for Email, Overview, Content (selected), Subscribers, Interactions, A/B Testing, Tracking, and Admin. The user profile 'Nicole Harrison' is visible in the top right. The main header shows 'Create An Email' with a sub-header 'Email Name, Send Date Sept. 26, 2023' and a 'Last saved on 9/26/2023 at 2:22 PM' timestamp. Below the header, there are three tabs: Define Properties, Add Content (selected), and Preview and Test. The left sidebar is divided into four sections: Basic Content (Button, Code Snippet, Free Form, HTML, Image Block), Advanced Content (A/B Test, Dynamic Content, Einstein Content Selection, Einstein Content Testing, Enhanced Dynamic Content, External Content, Einstein Content, Reference Content), Interactive Content (Email Form, Image Carousel), and Social Media (Social Follow, Social Share). The main editing area has fields for 'Subject' and 'Preheader', both with a yellow highlight and a placeholder 'Add Subject Line' and 'Add Preheader' respectively. Below these fields, there are tabs for 'Default', 'Plain Text', and 'Code View'. The 'Default' tab is active, showing a preview of the email design. The preview includes the Eastern Iowa Community Colleges logo (CLINTON • MUSCATINE • SCOTT) and the text 'THE Community's College'. Below the logo, there is a red button labeled 'Button Text'. Further down, there is a black silhouette of a building, followed by a 'TITLE' section with a paragraph of Lorem Ipsum text and another red button labeled 'Button Text'.

Step 9: Next we can start editing the email itself. Click on the section of the email you want to edit.



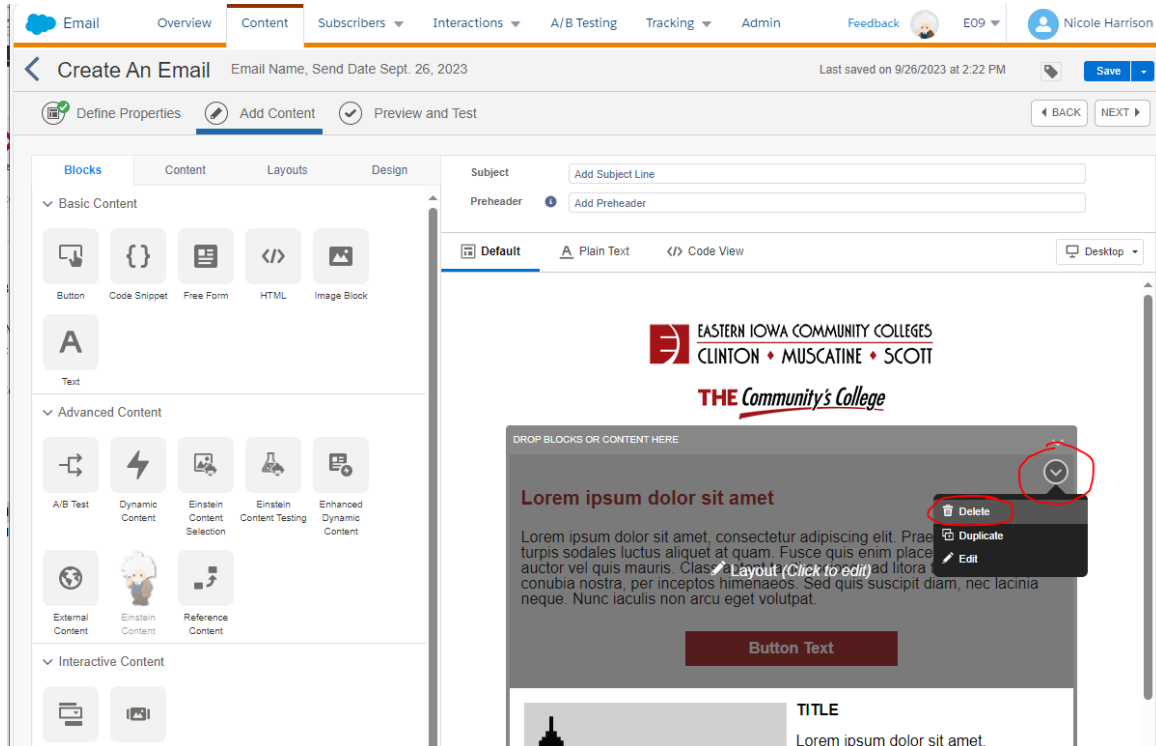
This will open the section for editing in the left hand side with text editor tools at the top.

Note: Copying and pasting text into the email can bring over formatting. Text should be set to Arial, Black, and 16px font size.

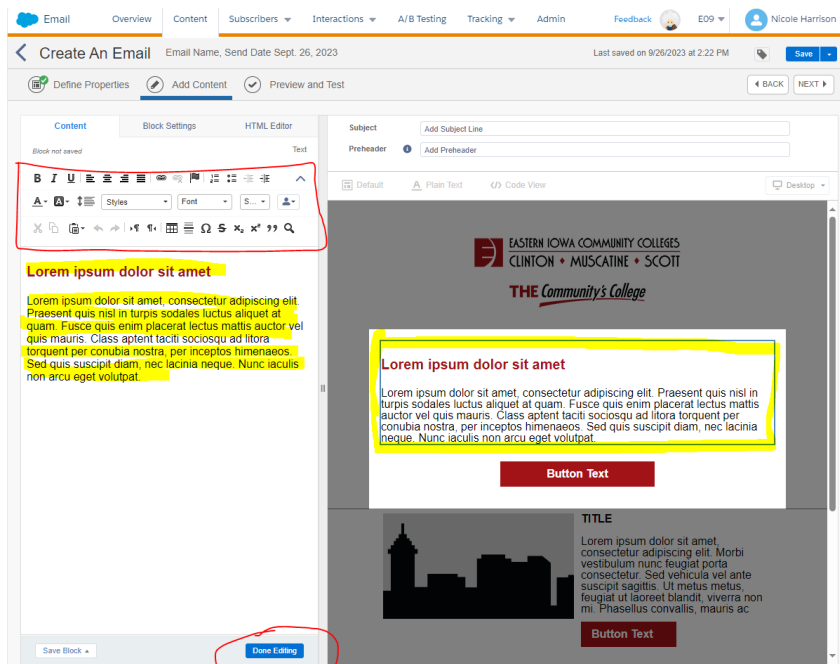


Step 10: The template is set up with some basic layout options, you can remove any section by clicking on the arrow that appears in the top right corner of a section when it is hovered over. You can then select the 'Delete' option from the dropdown.

You can also 'Duplicate' a section and open 'Editing' from this dropdown as well.



When you finish editing a section, click the blue 'Done Editing' button in the bottom right corner of the left hand column.



Step 11: Editing a button. Click on the button to open the editing window in the left column. Here you can set the Button Text, set the alignment of the button. And set the link the button goes to at the bottom of the left column.

The screenshot displays the 'Create An Email' interface. The top navigation bar includes links for Email, Overview, Content (selected), Subscribers, Interactions, A/B Testing, Tracking, Admin, Feedback, and a user profile for Nicole Harrison. The main header shows 'Create An Email' with a sub-header 'Email Name, Send Date Sept. 26, 2023' and a 'Last saved on 9/26/2023 at 2:26 PM' timestamp. Below the header is a progress bar with 'Define Properties', 'Add Content' (selected), and 'Preview and Test' steps. The 'Content' tab is active, showing a 'Block Settings' panel on the left and a 'HTML Editor' on the right. The 'Block Settings' panel includes sections for 'Text' (Button Text, Font, Color), 'Style' (Alignment, Background, Corner Radius, Padding, Border), and 'Link' (Save Block, Done Editing). The 'HTML Editor' shows a preview of the email content, including a header for 'EASTERN IOWA COMMUNITY COLLEGES' and a main body with a red button labeled 'Button Text'. A yellow box highlights the button in the preview, and a yellow box highlights the 'Button Text' field in the 'Text' section of the 'Block Settings' panel. A tooltip message states 'A subject line must be entered to send the email.'

Next view is of the options at the bottom of the button editor.



Create An Email

Email Name, Send Date Sept. 26



Define Properties



Add Content



Preview

Content

Block Settings

HTML Editor

Block not saved

Button

Background



#A21317

Corner Radius



0px

Padding

	5	
10		10
	5	

Border



#A21317

Border Width	0	
0		0
	0	

Link

Link to

Website (http://) ▾

Link URL

Enter URL



Title

Enter text describing the link

Tracking Alias

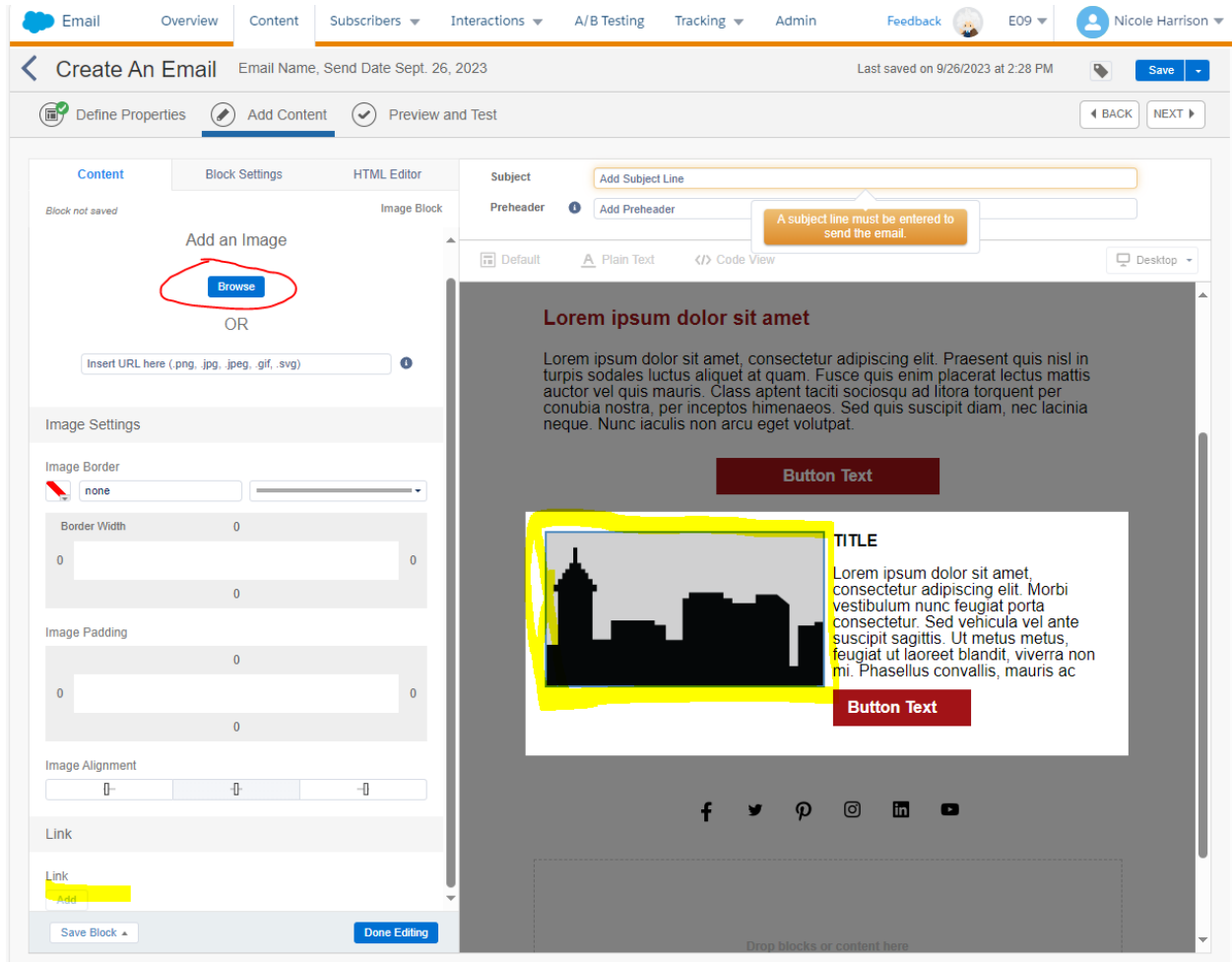
Enter tracking alias

☐ Conversion Tracking Link

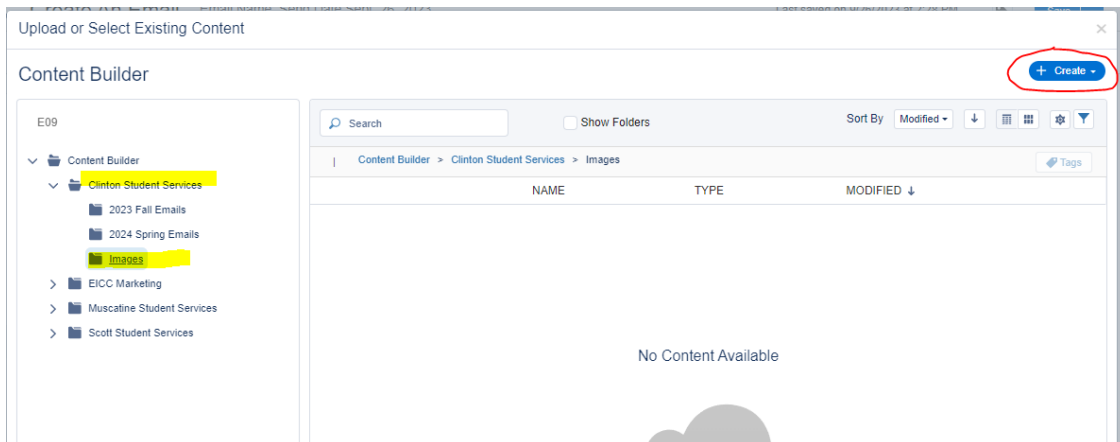
Save Block ▴

Done Editing

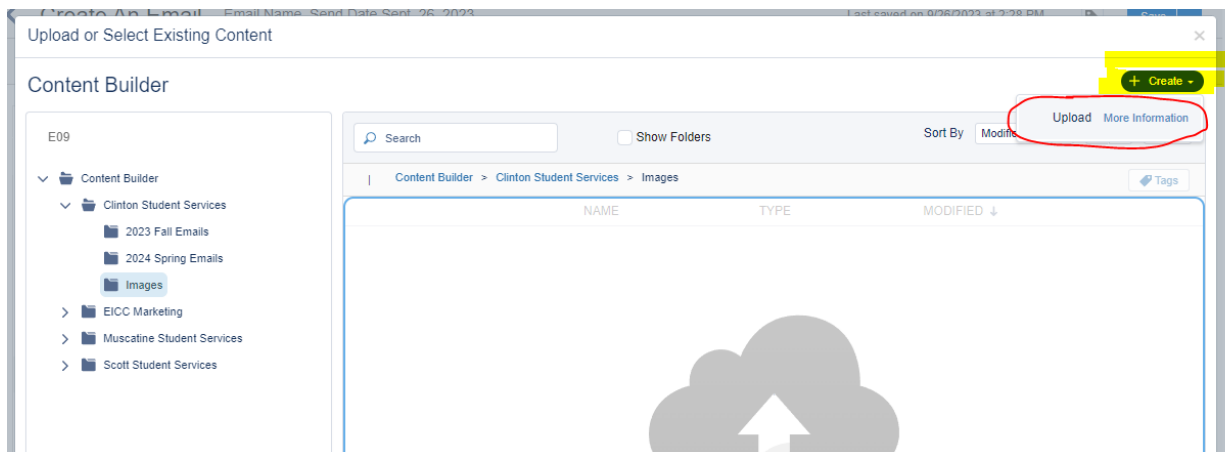
Step 12: Adding or Editing an Image. Any image in the email template can be clicked on to edit. This will bring up the editing window. To add an image, click on the blue 'Browse' button.



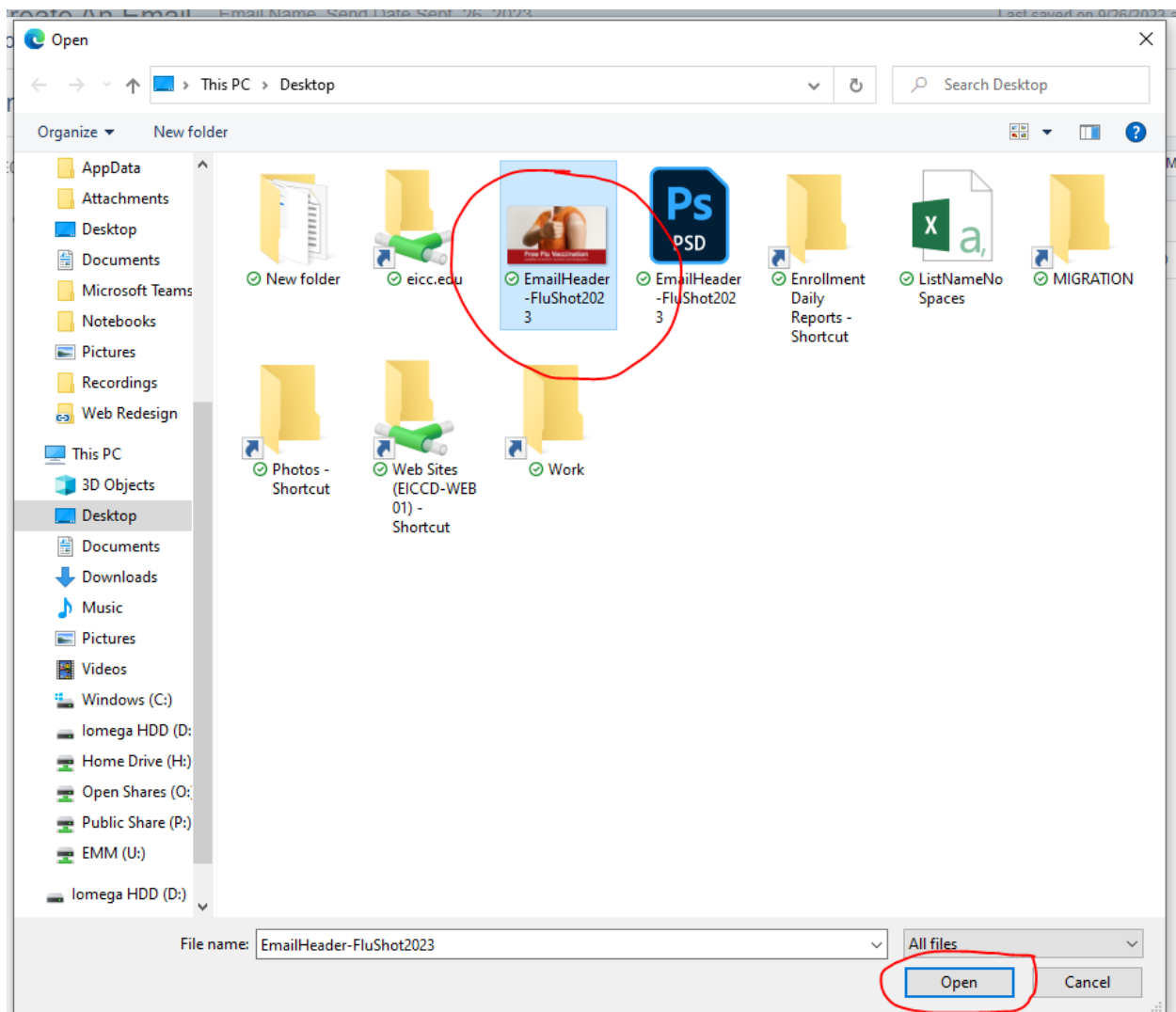
This will open a Content Builder window, navigate to the 'Images' folder under your specific campuses 'Student Services' folder. Click the blue 'Create' button in the top right corner.



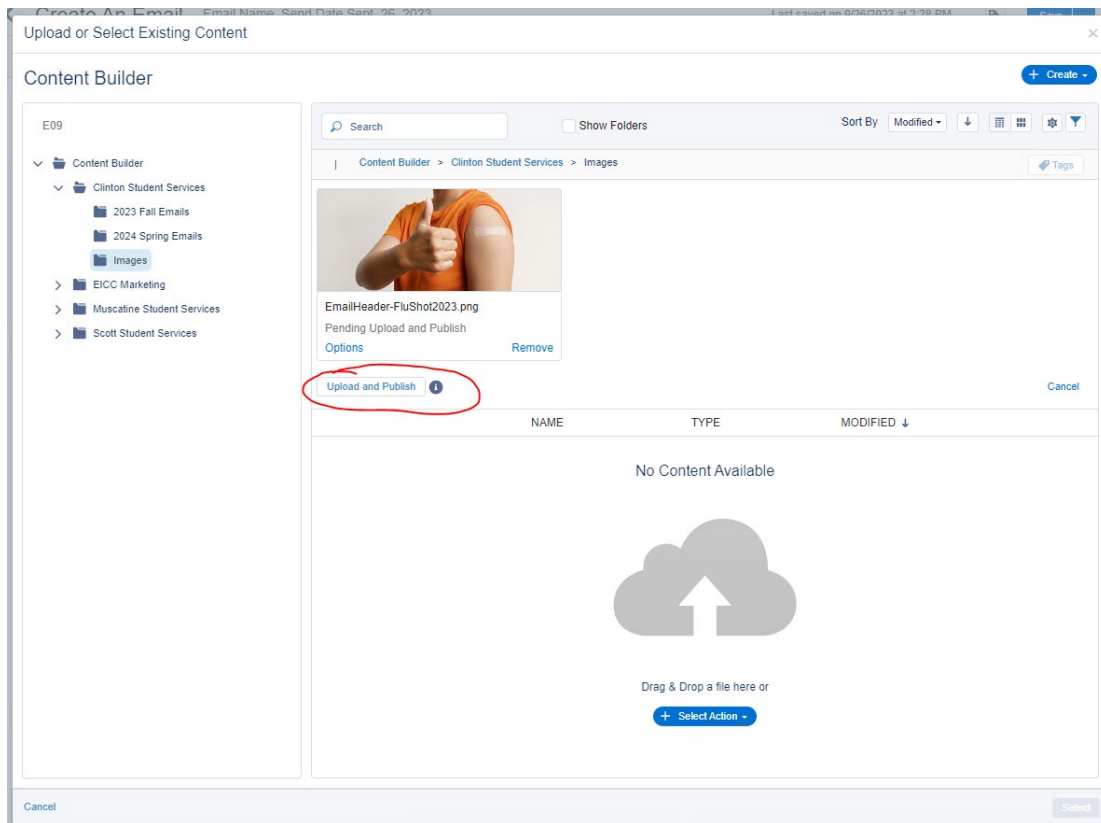
Select 'Upload' from the dropdown.



Navigate to the image you want to upload and select it, then click on the 'Open' button in the bottom right corner.

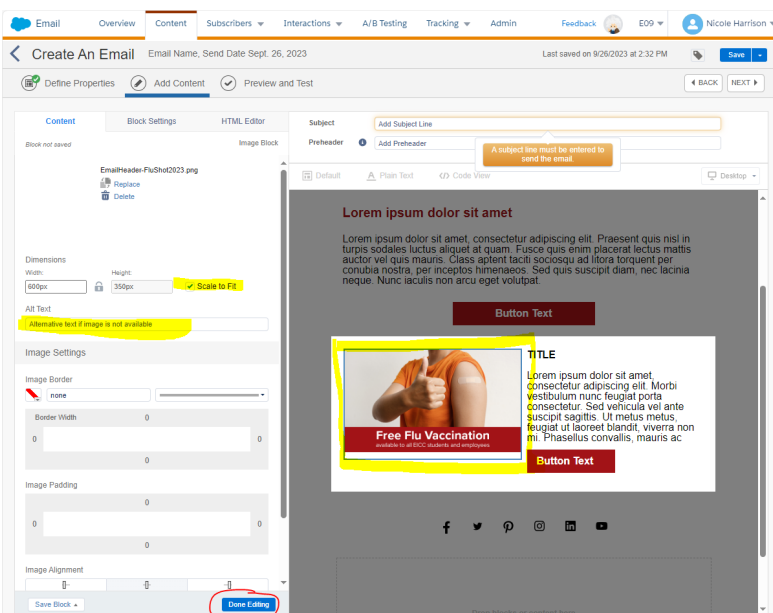


The image will upload and appear in the window. Click on the 'Upload and Publish' button underneath the image thumbnail.



The image will then load into the email. Make sure to click the 'Scale to Fit' check box in the image editor. You must also fill in the 'Alt Text' field with a description of the image.

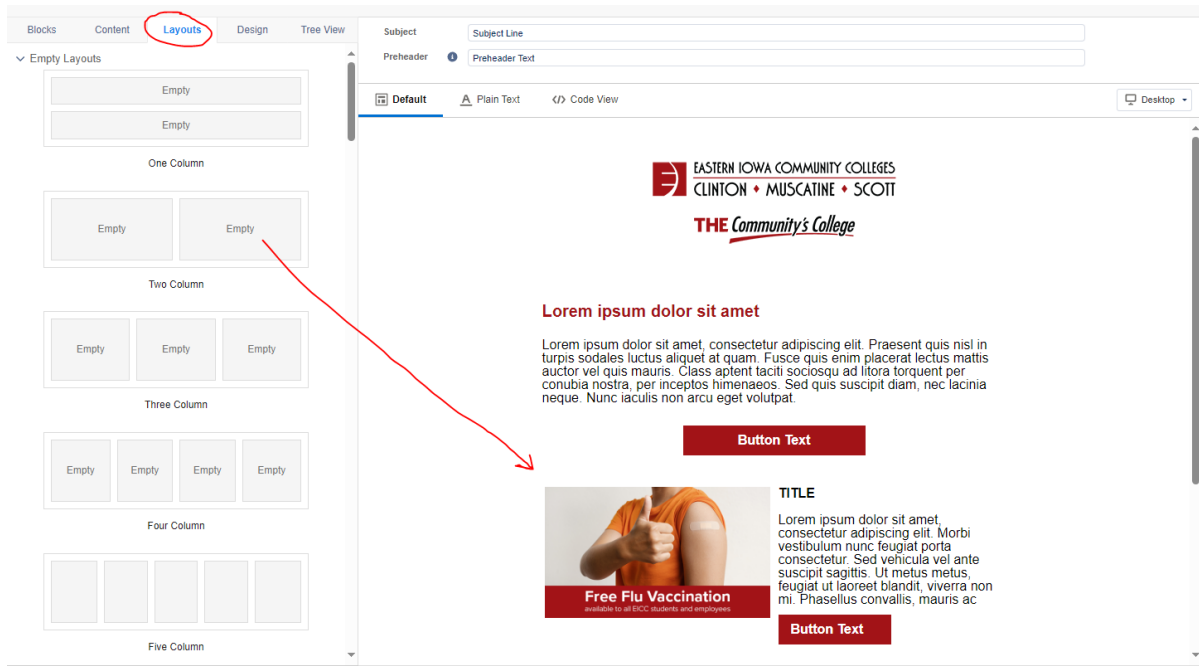
Then click the blue 'Done Editing' button at the bottom of the left column.



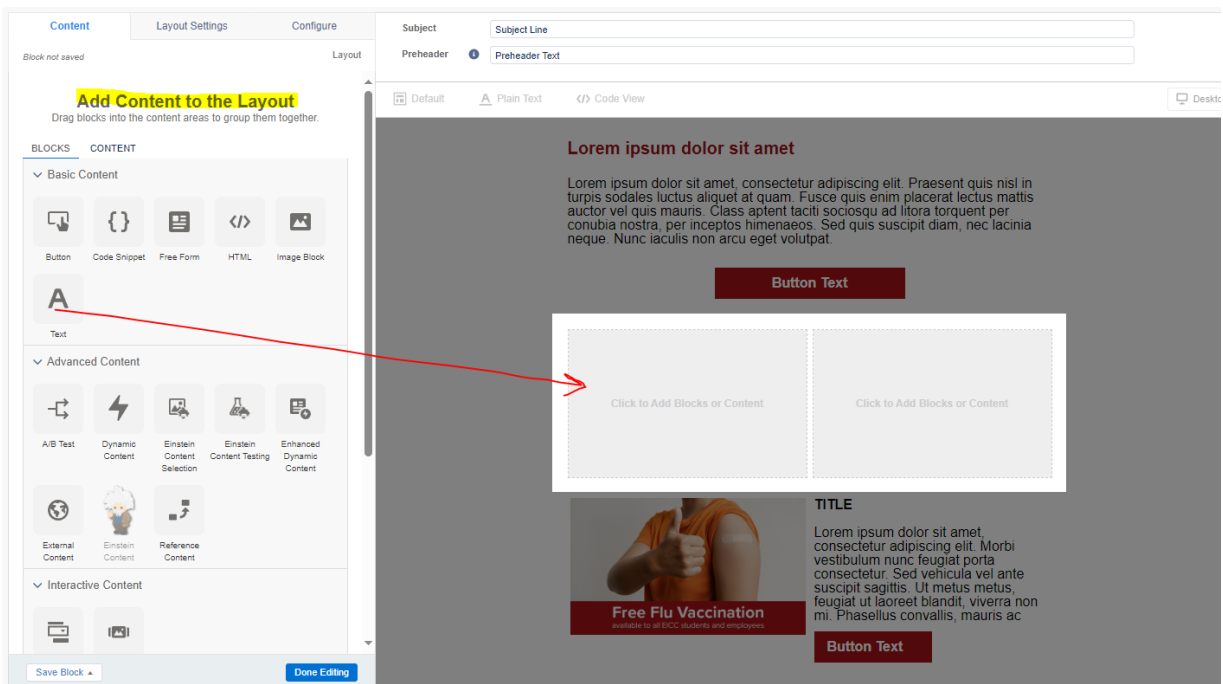
TIP: ADD LAYOUTS AND CONTENT BLOCKS

You can add more layouts and blocks of content into the email template to fit your content.

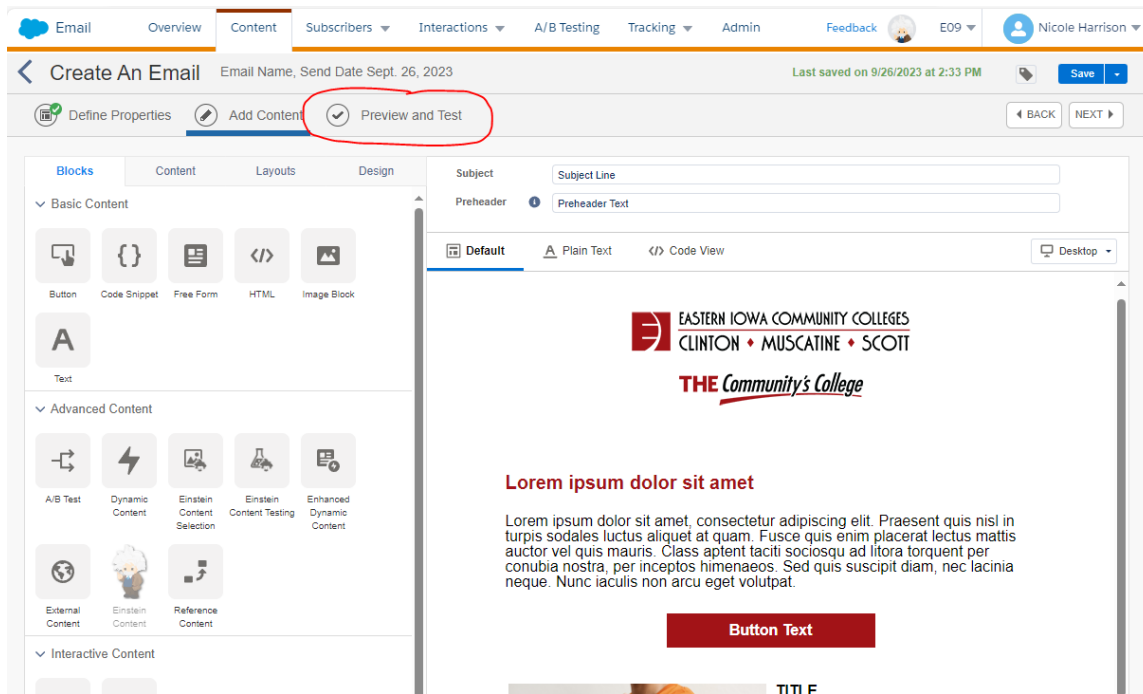
In the 'Layouts' tab of the left panel editor, you can drag and drop any layout option to any location in the email body.



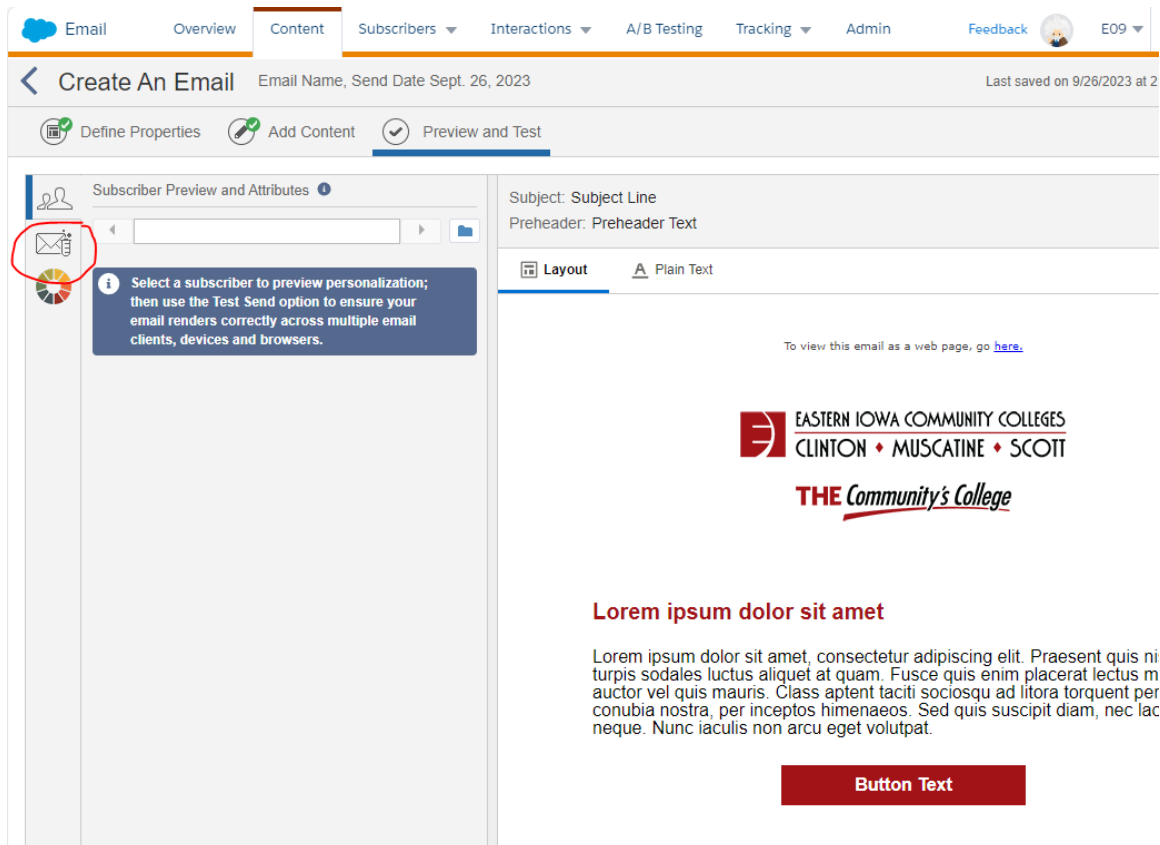
The layout will load and take you to a 'Content' tab, you can drag and drop any 'Basic Content' block into the new layout.



Step 13: When you are done editing the email, click the white 'NEXT' button in the top right corner. This will take you to the 'Preview and Test' tab.



Step 14: To send a test email, click on the email icon in the vertical toolbar on the left side of the screen.



Step 15: In the 'Recipients' section, make sure your email address is there, as well as any others you want to send the test email to. You just type in an individual email and press 'Enter' to add it.

You can edit the sender profile, and the prefix that shows before the Subject Line in the test email as well. You do not have to.

Then click the blue 'Send Test' button at the bottom of the left column.

Create An Email Email Name, Send Date Sept. 26, 2016

Define Properties Add Content Preview and Send

Test Send

Recipients:
Enter up to five email addresses or select a test data extension as the recipients of this send.

INDIVIDUALS TEST DATA EXTENSIONS

nharrison@eicc.edu Add email address and press Enter

Content Personalization Options
Based on Preview [Change](#)

Additional Options

From Options

FROM NAME SAVED SEND CLASSIFICATION

Default Commercial

Sender Profile Default

Description Account defaults
From Name Eastern Iowa Community College D...
From Email etreply@eicc.edu
Reply Name Eastern Iowa Community College D...
Reply Email etreply@eicc.edu

Delivery Profile Default

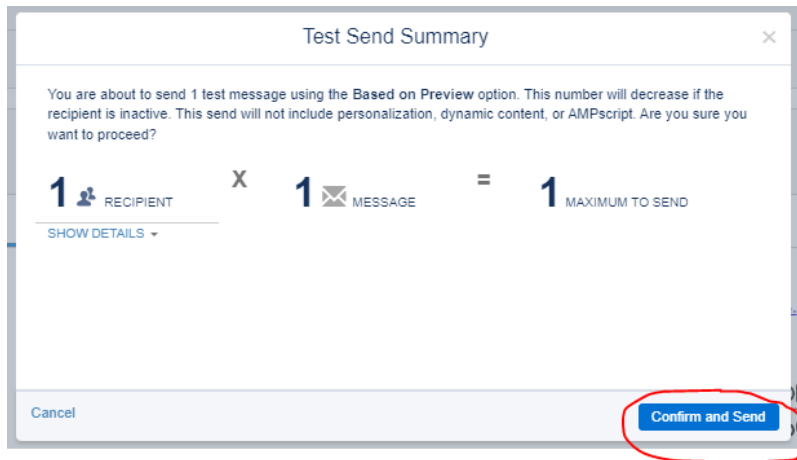
Description Account defaults
IP Address Account Default
Header Default
Footer Default

Subject Prefix [MCC:]

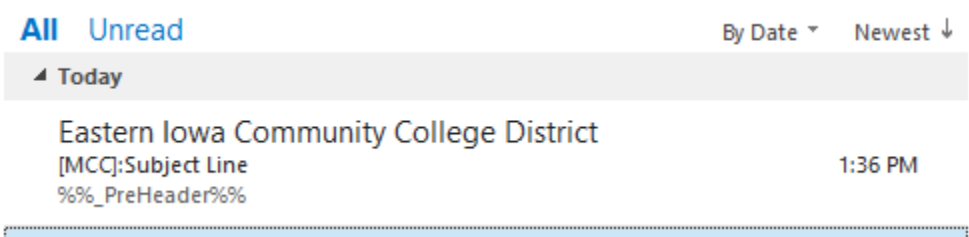
☒ Multipart MIME
☒ Track Clicks
☒ Suppress this send from reports
☐ Enable System Generated Links

Send Test

A dialogue box will pop up to confirm your test send. Just click on the blue 'Confirm and Send' button in the bottom right corner.



This will be what it looks like with those fields set in the previous screenshot. The default sender is 'Eastern Iowa Community College District', the '[MCC]:' appears before the subject line, any set preheader text will appear where it says %%PreHeader%%.



From here you can 'Save and Exit' or 'Save and Send' the email from the drop down option using the blue "Save" button in the top right corner.

