

Self-Help Guide

Salesforce Marketing Cloud: Send Mass Email using Content Builder

Salesforce Marketing Cloud (SMC) is the enterprise-supported tool for sending mass email communications to both internal and external audiences at the University.

This guide is for the newer **Content Builder** interface in Email Studio. Our Self Help Guide for the [mostly-retired Salesforce Marketing Cloud Classic Content](#) system has been retired.

[Login to Salesforce Marketing Cloud](#)

Get Ready to Work in Salesforce Marketing Cloud

Get Access and Support

Request a Salesforce Marketing Cloud Account

Mass Email System Access Request Form

<https://tdx.umn.edu/TDClient/31/Portal/Requests/ServiceDet?ID=324>

Obtain Access to Another Business Unit

<https://it.umn.edu/salesforce-marketing-cloud-how-obtain>

Log into Salesforce Marketing Cloud

Login and Get Started

<https://it.umn.edu/salesforce-marketing-cloud-login-get>

Supported Web Browsers

https://help.salesforce.com/articleView?id=mc_overview_graded_browser_support.h...

Unable to Login into the SMC

<https://it.umn.edu/salesforce-marketing-cloud-login-error>

Get Support and Inspiration

UMN Salesforce Marketing Cloud Users - Google Group

<https://groups.google.com/a/umn.edu/forum/#!forum/et-users>

Join this Google Group for access to good practices and community troubleshooting resources. Requires UMN ID log in.

UMN Salesforce Marketing Cloud Users - Web Site and Blog

<http://mc-user-group.umn.edu/>

Schedule 1-on-1 Help with a Marketing Cloud Expert

<https://z.umn.edu/mc-1on1>

Contact UofM Salesforce Marketing Cloud Support and Admins

<https://it.umn.edu/salesforce-marketing-cloud-contact-uofmn>

Learn About Essential Requirements

Learn About Accessible Emails

Why We Care About an Accessible U

<https://accessibility.umn.edu/>

Learn Core Skills For Accessible Writing

<https://accessibility.umn.edu/start-small-start-now>

Headings, hyperlinks, color and contrast are important elements of accessible emails.

Good Practices for Accessible Emails

<https://litmus.com/blog/ultimate-guide-accessible-emails>

Understand Mass Email Policy and Laws

UMN Mass Email Privacy Statement

<https://privacy.umn.edu/mass-email-privacy>

This link must be embedded in the footer of every mass electronic mail message you send.

University Relations: Mass Email Requirements and Guidelines

<https://university-relations.umn.edu/resources/mass-email-requirements>

Federal Trade Commission: CAN-SPAM Act - Compliance Guide

<https://www.ftc.gov/tips-advice/business-center/guidance/can-spam-act-complianc...>

Adhere to UMN Branding

Our Brand: Mass Email Templates

<https://university-relations.umn.edu/resources/mass-email-templates>

The UMN-branded responsive email template is already available within Salesforce Marketing Cloud

Our Brand: Logos

<https://university-relations.umn.edu/resources/logo-guidelines-and-download>

Our Brand: Color and Type

<https://university-relations.umn.edu/resources/colors-and-type>

Our Brand: Social Networking Graphics

<https://university-relations.umn.edu/resources/channel-specific-social-media-ic...>

Learn About Email Quality

Learn Good Writing Style

Writing an Attractive Subject Line

<https://www.nngroup.com/articles/email-subject-lines/>

Writing Better Subject Lines (video 3m 3s)

<https://www.linkedin.com/learning/optimizing-marketing-emails/subject-lines?u=4...>

Avoiding Spam Filters

Spam-Proof Your Email Marketing

<https://www.classy.org/blog/spam-proof-email-marketing/>

Create and Send a Mass Email Message

Creating and Editing Your Email

Create Email in Email Studio - Content Builder

Create a Content Builder Email

https://help.salesforce.com/articleView?id=mc_es_create_content_builder_email.h...

University-Branded Shared Templates

<https://university-relations.umn.edu/resources/mass-email-templates>

Templates created by University Relations to help you meet branding, legal, and policy requirements.

Create an Email from a Template

https://help.salesforce.com/articleView?id=mc_es_build_email_from_template_usin...

Create an Email from a Template (video 3m 4s)

<https://www.youtube.com/watch?v=cNPbslropKQ>

Create an Email from an Existing Email

https://help.salesforce.com/articleView?id=mc_es_build_from_existing_email.htm&...

Working with Templates and Email in Content Builder (video 45m 53s)

<http://salesforce.vidyard.com/watch/zsJibGYVnKsR4NAi2Yspq6>

Long recorded webinar.

Adding Content Blocks

Comparison of Content Blocks

<http://mc-user-group.umn.edu/news/text-block-vs-image-block-vs-free-form-block>

Free Form Block

https://help.salesforce.com/articleView?id=mc_ceb_add_free_form_content.htm&typ...

Image Block

https://help.salesforce.com/articleView?id=mc_ceb_add_image_content.htm&type=5

Text Block

https://help.salesforce.com/articleView?id=mc_ceb_use_a_text_content_block.htm&...

HTML Block

https://help.salesforce.com/articleView?id=mc_ceb_add_html_content.htm&type=5

Reference Block

https://help.salesforce.com/articleView?id=mc_ceb_add_a_reference_block.htm&typ...

Button Block

https://help.salesforce.com/articleView?id=mc_ceb_add_button.htm&type=5

Working with Links, Images, Video, and Personalization

Personalization Strings

<http://mc-user-group.umn.edu/news/using-personalization-strings>

Embedding a Video

<http://mc-user-group.umn.edu/news/embedding-videos-email>

Working with Images

<https://it.umn.edu/salesforce-marketing-cloud-working>

Modifying Link Expiration

<https://it.umn.edu/salesforce-marketing-cloud-link-url>

By default, links work for 60 days.

Image Size Limits and File Types

<http://mc-user-group.umn.edu/news/image-size-limits-and-file-types>

Link to a Web Version of an Email

<http://mc-user-group.umn.edu/news/add-web-version-link-and-add-today%E2%80%99s-...>

Upload Files

https://help.salesforce.com/articleView?id=mc_ceb_upload_files.htm&type=5

Using an Appropriate Footer

Be sure that your footer includes required content.

Using Footers from University Relations

<https://it.umn.edu/salesforce-marketing-cloud-using-footers>

Commercial versus Transactional Footer

<http://mc-user-group.umn.edu/news/commercial-versus-transactional-footer>

Creating an HTML Paste Email

Build an Email from HTML with Content Builder Tools

https://help.salesforce.com/articleView?id=mc_es_build_email_from_html_using_co...

Work with Audience/Recipients

Subscribers

What is a Subscriber and a Subscriber Key?

<http://mc-user-group.umn.edu/news/back-basics-what-subscriber>

Working with Data Extensions

Getting Started with Data Extensions

https://help.salesforce.com/articleView?id=mc_es_de_enhanced_subscriber.htm&type=5

Customer Key

https://help.salesforce.com/articleView?id=mc_ceb_customer_key.htm&type=5

Audience Rules

https://help.salesforce.com/articleView?id=mc_es_audience_rules.htm&type=5

De-Duplication

https://help.salesforce.com/articleView?id=mc_es_deduplication.htm&type=5

Creating a New Data Extension

https://help.salesforce.com/articleView?id=mc_es_create_data_extension.htm&type=5

Create from Existing Data Extension

https://help.salesforce.com/articleView?id=mc_es_create_de_from_de.htm&type=5

Data Extension Properties

https://help.salesforce.com/articleView?id=mc_es_de_properties.htm&type=5

Importing into a Data Extension

https://help.salesforce.com/articleView?id=mc_es_import_into_de.htm&type=5

Edit a Data Extension

<https://it.umn.edu/services-technologies/how-tos/salesforce-marketing-cloud-edition-2018-01-11>

Edit, add, or delete individual records in a Data Extension.

Working with Data Extensions Sourced from the Donor Management System (DMS)

Requirements and info about using email addresses sourced from DMS.

Donor Management System (DMS) Overview

<https://it.umn.edu/donor-management-system-dms-overview>

What do I need to know about DMS data?

<https://it.umn.edu/donor-management-system-dms-what-do-i-need-to-know-about-dms-data>

Policy and Rules for DMS data

<https://it.umn.edu/donor-management-system-dms-policy-rules>

Requesting a DMS Data Extension (Email List)

<https://it.umn.edu/donor-management-system-dms-requesting-a-dms-data-extension-email-list>

DMS Data Extension Basics

<https://it.umn.edu/donor-management-system-dms-dms-data>

Footers in Email Sent to DMS Data Extensions

<https://it.umn.edu/donor-management-system-dms-footers-in>

Handling Unsubscribe Requests for DMS Data Extensions

<https://it.umn.edu/donor-management-system-dms-handling>

FAQ - Using DMS Data Extensions in Salesforce Marketing Cloud (SMC)

<https://it.umn.edu/donor-management-system-dms-faq-using>

Lists

Comparison of Lists and Data Extensions

<http://mc-user-group.umn.edu/news/lists-vs-data-extensions>

Publication Lists

What is a Publication List?

<http://mc-user-group.umn.edu/news/what-publication-list>

Publication Lists in Salesforce Marketing Cloud

https://help.salesforce.com/articleView?id=mc_es_publication_lists.htm&type=5

Publication lists enable better control over handling of unsubscribe requests.

Pre-Send Quality Check

Previewing and Testing

Subscriber Preview and Test Send

https://help.salesforce.com/articleView?id=mc_es_subscriber_preview_test_send.h...

Use Subscriber Preview and Test Send

https://help.salesforce.com/articleView?id=mc_es_perform_subscriber_preview_tes...

Email Display on Different Devices

<http://mc-user-group.umn.edu/help/mass-email-testing>

Preview in SMC and Litmus.

Send an Email

Sending Mass Email

Define Properties

https://help.salesforce.com/articleView?id=mc_es_define_properties.htm&type=5

Select Audience

https://help.salesforce.com/articleView?id=mc_es_select_audience.htm&type=5

Configure Delivery

https://help.salesforce.com/articleView?id=mc_es_configure_delivery.htm&type=5

Send Flow

https://help.salesforce.com/articleView?id=mc_es_send_flow.htm&type=5

Send an Email (video 1m 58s)

<https://www.youtube.com/watch?v=2r5ntA3FSIQ>

Review and Send

https://help.salesforce.com/articleView?id=mc_es_review_send.htm&type=5

Creating and Updating Sender Profiles

<http://mc-user-group.umn.edu/news/how-and-why-sender-profiles>

Who are you?

Advanced Topics

Tracking, Reporting, and Testing

Tracking and Reporting

Tracking

https://help.salesforce.com/articleView?id=mc_es_tracking_overview.htm&type=5

Tracking Workspace

https://help.salesforce.com/articleView?id=mc_es_tracking_workspace.htm&type=5

Running a Report

https://help.salesforce.com/articleView?id=mc_es_reports.htm&type=5

A/B Testing

Assessing Effectiveness Using A/B Testing

https://help.salesforce.com/articleView?id=mc_es_ab_testing.htm&type=5

Sharing

Share with Other Business Units

Share Content

https://help.salesforce.com/articleView?id=mc_ceb_share_content.htm&type=5

Content Sharing (video 2m 43s)

<https://www.youtube.com/watch?v=C78SQ3AVbK4>

Share Folders and Content

https://help.salesforce.com/articleView?id=mc_ceb_share_folders_and_content.htm...

Unshare Folders and Content

https://help.salesforce.com/articleView?id=mc_ceb_unshare_content.htm&type=5

Shared Data Extensions

https://help.salesforce.com/articleView?id=mc_es_shared_data_extensions.htm&typ...

Content Builder Templates

Creating Templates

Create a Template

https://help.salesforce.com/articleView?id=mc_ceb_create_templates.htm&type=5

Create a Template (video 2m 2s)

https://www.youtube.com/watch?v=2EiZ6fcK_fE

Add Content to a Template

https://help.salesforce.com/articleView?id=mc_ceb_add_content_to_a_template.htm...

Create Template Fields

https://help.salesforce.com/articleView?id=mc_ceb_complete_create_template_fiel...

Modify Content Area Properties

https://help.salesforce.com/articleView?id=mc_ceb_modify_content_area_propertie...

Restrict a Content Area

https://help.salesforce.com/articleView?id=mc_ceb_restrict_a_content_area.htm&t...

Add Content to a Paste HTML Template

https://help.salesforce.com/articleView?id=mc_ceb_add_content_paste_html.htm&ty...

View or Modify a Template

https://help.salesforce.com/articleView?id=mc_ceb_view_or_modify_a_template.htm...

Beyond Email Studio

Journeys and Automations

Learn about Automation Studio

https://help.salesforce.com/articleView?id=mc_as_automation_studio.htm&type=5

Automation Studio (video 5m 48s)

https://www.youtube.com/watch?v=A_LabRCwGRc

Learn about Journey Builder

https://help.salesforce.com/articleView?id=mc_jb_journey_builder.htm&type=5

Becoming Familiar with Journey Builder (video 8m 42s)

<https://www.youtube.com/watch?v=YAA1rbneMSY>

Web Studio

Use CloudPages

https://help.salesforce.com/articleView?id=mc_cp_cloudpages.htm&type=5

Create a Landing Page with CloudPages (video 2m 32s)

<https://www.youtube.com/watch?v=j8VjgWZL9bQ>

Move to Content Builder from Classic Content

Understanding the Process

Content Builder Adoption Resources and Classic Content Plan

https://help.salesforce.com/articleView?id=mc_overview_content_and_email_creati...

Content Builder Import - Best Practices

https://help.salesforce.com/articleView?id=mc_ceb_content_builder_best_practice...

Tips for importing Classic Content into Content Builder.

Import Content Overview

https://help.salesforce.com/articleView?id=mc_ceb_import_content.htm&type=5

Import Content FAQs

https://help.salesforce.com/articleView?id=mc_ceb_import_content_faqs.htm&type=5

Switching to Content Builder

Switch Between Content Tools

[https://help.salesforce.com/articleView?id=mc_overview_switch_between_content t...](https://help.salesforce.com/articleView?id=mc_overview_switch_between_content_t...)

Add and Import Content (video 2m 7s)

<https://www.youtube.com/watch?v=Yg0guLX57n8>

Import Content from Classic Email to Content Builder

[https://help.salesforce.com/articleView?id=mc_ceb_import_content_from_classic e...](https://help.salesforce.com/articleView?id=mc_ceb_import_content_from_classic_e...)