

## 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...](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...](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...](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&...](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...](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](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&...](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](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...](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](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](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...](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&typ...](https://help.salesforce.com/articleView?id=mc_es_de_enhanced_subscriber.htm&typ...)

Customer Key

[https://help.salesforce.com/articleView?id=mc\\_ceb\\_customer\\_key.htm&type=5](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](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](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...](https://help.salesforce.com/articleView?id=mc_es_create_data_extension.htm&type...)

Create from Existing Data Extension

[https://help.salesforce.com/articleView?id=mc\\_es\\_create\\_de\\_from\\_de.htm&type=5](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](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](https://help.salesforce.com/articleView?id=mc_es_import_into_de.htm&type=5)

Manually Add Recipients

[https://dramevent.secure.force.com/articleView?id=mc\\_cab\\_add\\_records.htm&type=5](https://dramevent.secure.force.com/articleView?id=mc_cab_add_records.htm&type=5)

## **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>

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>

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](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...](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...](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](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](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](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](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](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](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](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](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](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](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...](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](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...](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](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](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...](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...](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...](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...](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...](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...](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](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](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](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](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...](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...](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](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](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...)