University of Minnesota

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 shows how to use the **Content Builder** interface in Email Studio. It also gives guidelines for using URelations templates, making your emails accessible and correctly using University-provided mailing lists.

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

Complete Marketing Cloud Training

Self-paced Training: Send Mass Email Using Content Builder
https://training.umn.edu/courses/11801

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/
Contact UMN 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/
Create Accessible Content: Email and Mass Email
https://accessibility.umn.edu/what-you-can-do/create-accessible-content/email-m...
Learn Core Skills For Accessible Writing
https://accessibility.umn.edu/start-small-start-now
Headings, hyperlinks, alt text, color and contrast are important elements of 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
CAN-SPAM Act and University of Minnesota Mass Email Requirements
/services-technologies/how-tos/salesforce-marketing-cloud-can-spam-act

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/

Avoiding Spam Filters

Spam-Proof Your Email Marketing
https://help.salesforce.com/s/articleView?id=mktg.pardot_content_and_spam_filte...

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

Sender Profiles

Create a Sender Profile in Salesforce Marketing Cloud
https://university-relations.umn.edu/blog/2017/06/09/create-sender-profile-sale...
The How and Why of Sender Profiles
https://mc-user-group.umn.edu/how-and-why-sender-profiles

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...
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...
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
Data Retention for Data Extensions
/services-technologies/how-tos/salesforce-marketing-cloud-data
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-edi...
Edit, add, or delete individual records in a Data Extension.
Exporting Data Extensions
/services-technologies/resources/exporting-data-extensions-in-salesforce

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/services-technologies/how-tos/donor-management-system-dms-dm...
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

Send Flow Overview
https://help.salesforce.com/articleView?id=mc_es_send_flow.htm&type=5
Launch Send Flow
https://help.salesforce.com/s/articleView?id=sf.mc_es_launch_send_flow.htm&type...
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
Review and Send
https://help.salesforce.com/articleView?id=mc_es_review_send.htm&type=5
Send Throttling for Sends over 15,000 Recipients
https://drive.google.com/file/d/1_rsdP6kp82PriZpZ9dfcQJjaXEn_yoYT/view?usp=shar...

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

Web Studio

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