

The Salesforce logo, consisting of the word "salesforce" in white lowercase letters inside a blue cloud-like shape.

# CONTENT BUILDER

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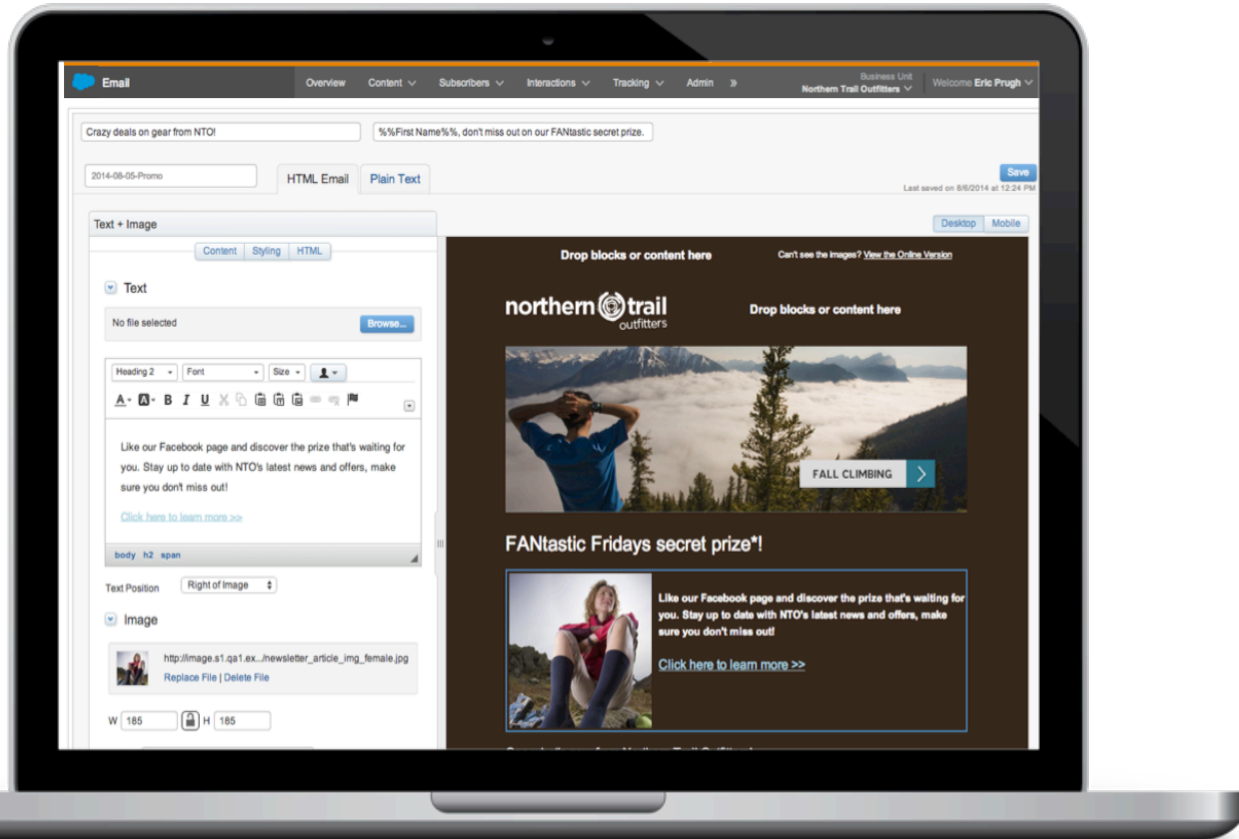
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# CONTENT BUILDER: OVERVIEW





Upload files for use in:

- Content Builder Emails & Templates
- Cloud Pages

Preview content as you build

- View changes in real time
- Intelligent HTML paste option

Global search and organization

- Sharing and tagging

Store content areas to leverage content across channels

Create content using 3 objects: Content Blocks, Templates, and Layouts.

## Content Blocks

Pre-defined portions of a Template-based Email

Can insert various types of content

Saved for use across multiple emails and Cloud Pages

## Templates

Define the overall structure and layout of an email

Created within Email Studio or the Classic Editor

Saved for use to give consistent look and feel across multiple emails

## Layouts

Pre-defined formatting options combining different Content Blocks types

Allow for more advanced content designs

Replaces the Tables feature in the Classic Editor



Import existing content and or Folders from Classic View

Create new Email, Templates, Content Blocks, or Upload an asset from your computer.

Sort By Name

Sort By Ascending or Descending on whichever column you have selected

View results in list view or icon view

Remove certain columns from the Content Grid to

The image shows a toolbar with the following elements from left to right: an 'Import' button, a '+ Create' button with a dropdown arrow, a 'Sort By' label followed by a 'Name' dropdown menu, an icon for ascending/descending sort, two icons for list and grid views, and an icon for column management. Red arrows point from text boxes to each of these elements.

## Images

- .jpeg
- .gif
- .bmp
- .png
- .tif
- .jpg
- .tiff

## Documents

### Microsoft Office

Word

Excel

PowerPoint

Outlook Calendar

### Other:

.txt

.rtf

.pdf

Quicktime

## Other

### Code

- .html
- .css
- .js
- .xml
- .xslt

### Video

- .vl
- .mpeg
- .mpg
- .swf

### Audio


mp3

.ogg

.wav

# TEMPLATES



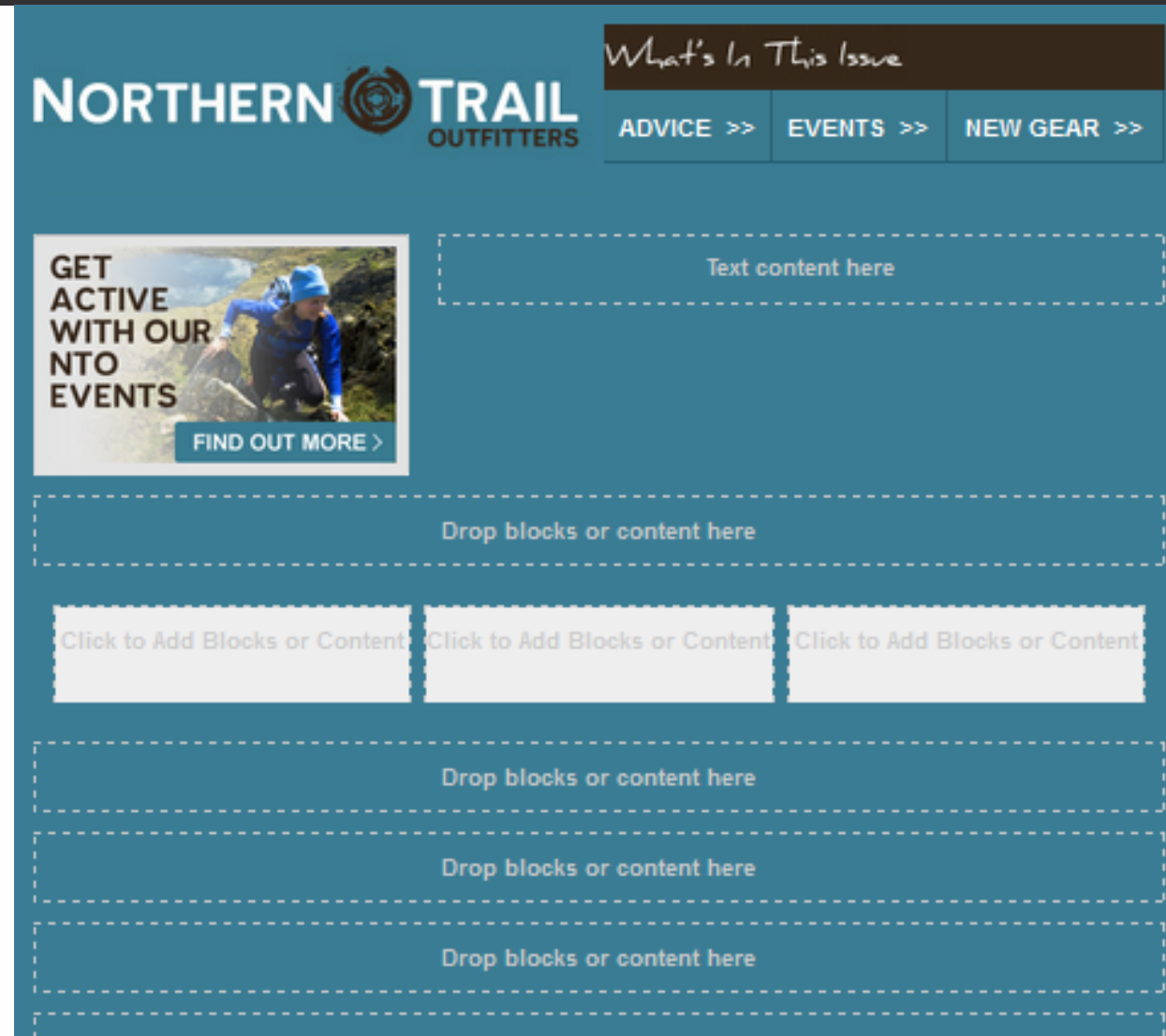
DEFINITION:  A **Template** defines the layout and basic design of an email, including the brand and design elements.

## Template layouts:

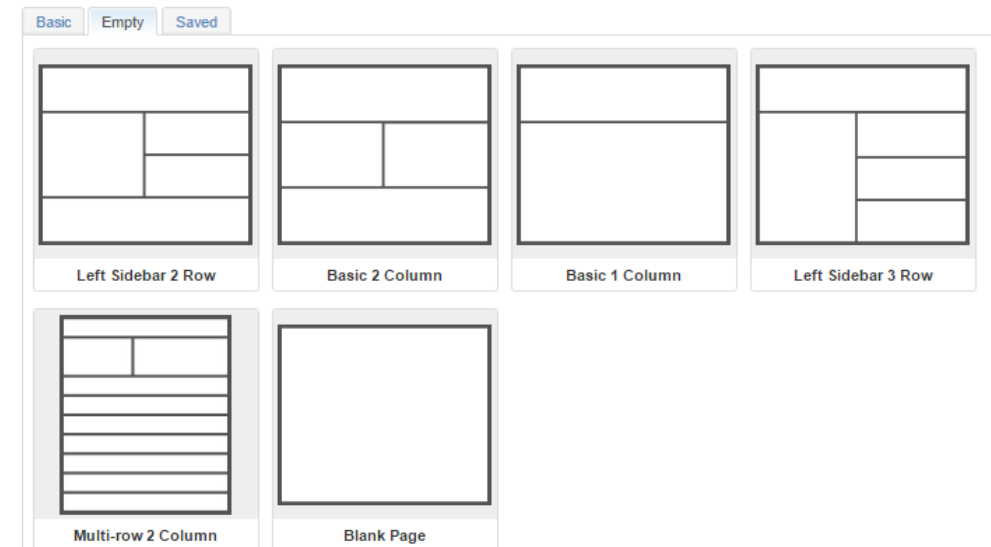
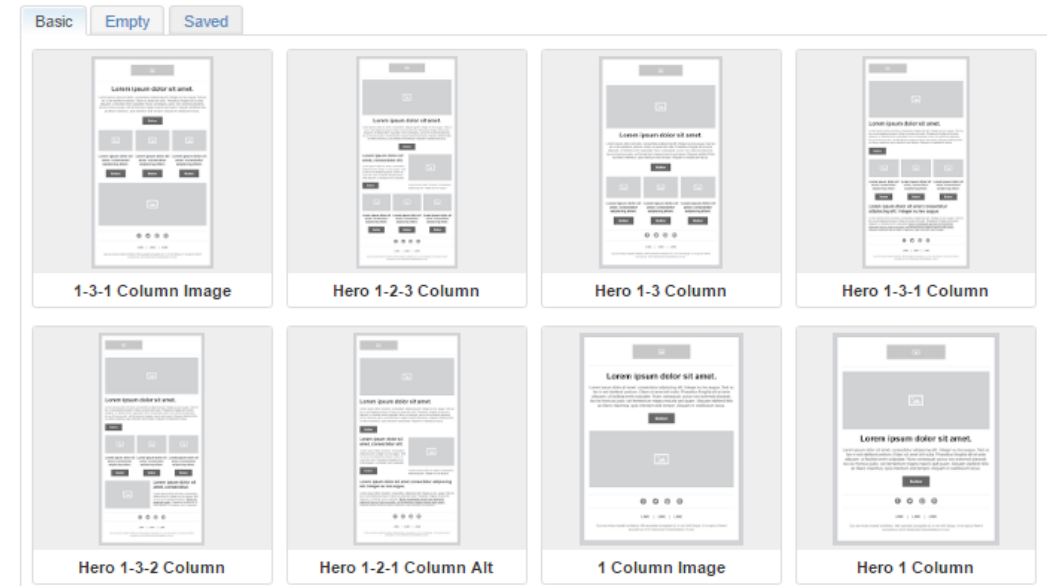
- Control standardized content for consistent brand across emails and campaigns
- Contain placeholders for creating and adding content
  - Unused blocks collapse

## Two ways to create a template:

- Empty Template
- HTML



- Predefined in Content Builder
- No technical expertise needed
- Choose from
  - Basic
  - Empty
  - Saved Templates
- Decide on banner, borders, and background



# CONTENT BLOCKS



**DEFINITION:**  A content block is a piece of material used to populate an email. Content blocks can be reused across emails, templates and Cloud Pages.

## 2 Methods for Creating Content Blocks:

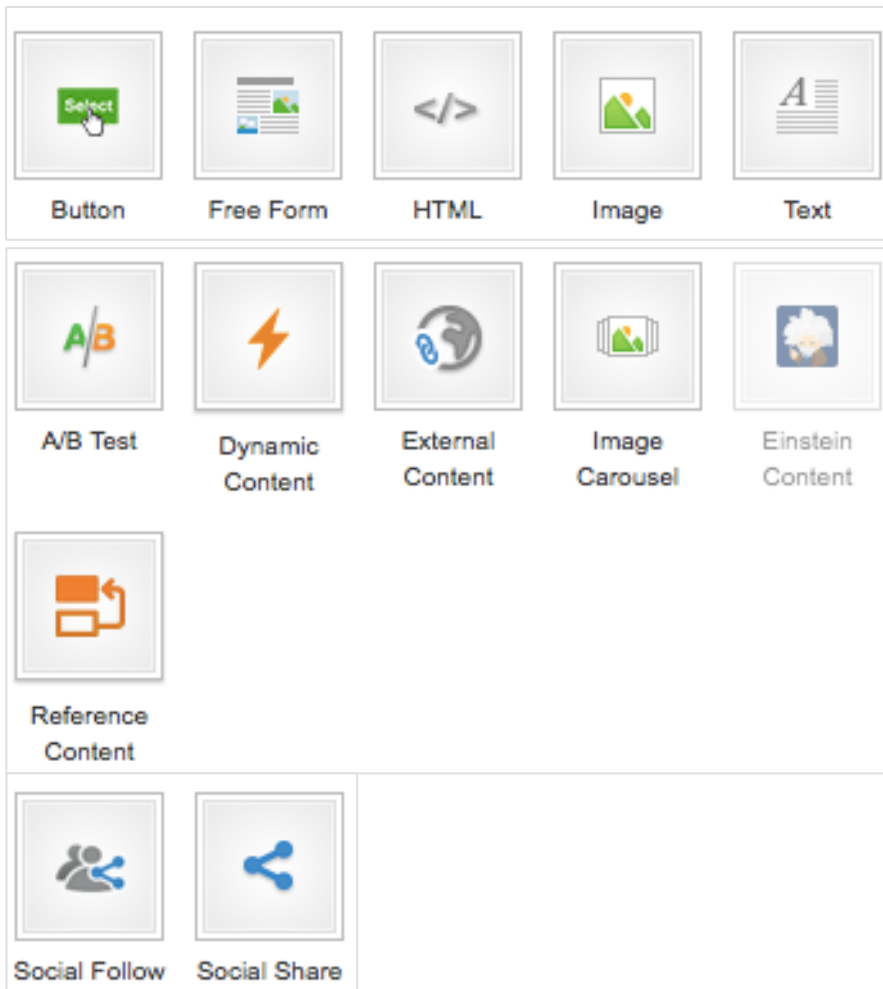
### Option 1 (Reusable Content)

1. Create content blocks in Content Builder
2. Drag and drop content into email or page

### Option 2 (One-Time Content)

1. Build content directly in the email or on the page being created

The screenshot displays the Northern Trail Outfitters website with several content blocks. At the top right, there is a navigation menu with 'What's In This Issue', 'ADVICE >>', 'EVENTS >>', and 'NEW GEAR >>'. Below this, a 'GET ACTIVE WITH OUR NTO EVENTS' block features a photo of a person rock climbing and a 'FIND OUT MORE >' button. A large 'Essential Camping Stoves & Accessories' block includes a tree background, a tent icon, and a 'Read More' button. A row of three event cards follows: 'Climbing Adventure' in Tasmania, Australia (April 10 - May 08), 'Menu Via Shark's Fin' in Garwhal Himalaya, India (June 15 - June 25), and 'Hike Through the Arctic Refuge' in Brooks Range, Alaska (November 1 - November 13), each with a 'BOOK NOW >' button. At the bottom, a 'Read how Gottsegen survived the attack' block features a photo of a woman and a 'Read More' button.



## Basic Content

- Button
- Free Form
- HTML
- Image
- Text

## Advanced Content

- A/B Testing
- Dynamic Content
- External Content
- Image Carousel
- Einstein Content\*
- Reference Content

## Social Media Content

- Social Share
- Social Follow


NOTE:



Drag & drop different types of content blocks into each other for more sophisticated content.

# DYNAMIC CONTENT



DEFINITION:  Dynamic content renders different content based on data stored in Sales Cloud at time of send.

**Dynamic Content Block**

**NORTHERN TRAIL** **OUTFITTERS** *What's In This Issue*  
ADVICE >> EVENTS >> NEW GEAR >>

**GET ACTIVE WITH OUR NTO EVENTS**  
FIND OUT MORE >

Go on a Rock Climbing Trip with NTO  
Quentin, put your new rock-climbing skills to the test at some of the best climbing destinations in North America. We provide the climbing equipment and professional instruction, you bring the sweat. Climbing gear provided by expert instructors and world class destinations from Joshua Tree to Gunks.

**Essential Camping Stoves & Accessories**  
Read More

**Essential Camping Stoves & Accessories**  
Read More

**Yoga for Athletes: the Key for Balance**  
Read More

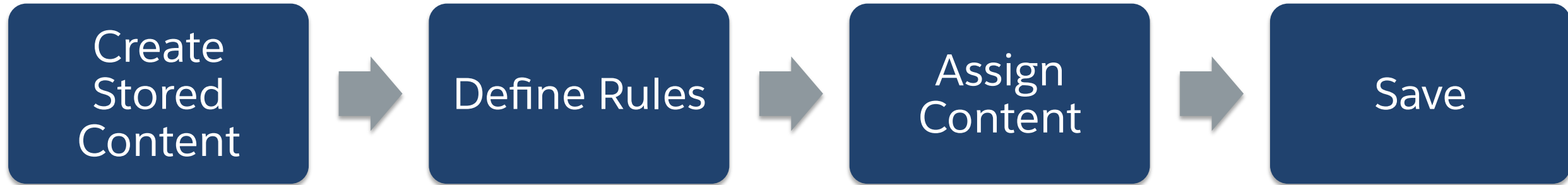
**Bike Inspection: What to**

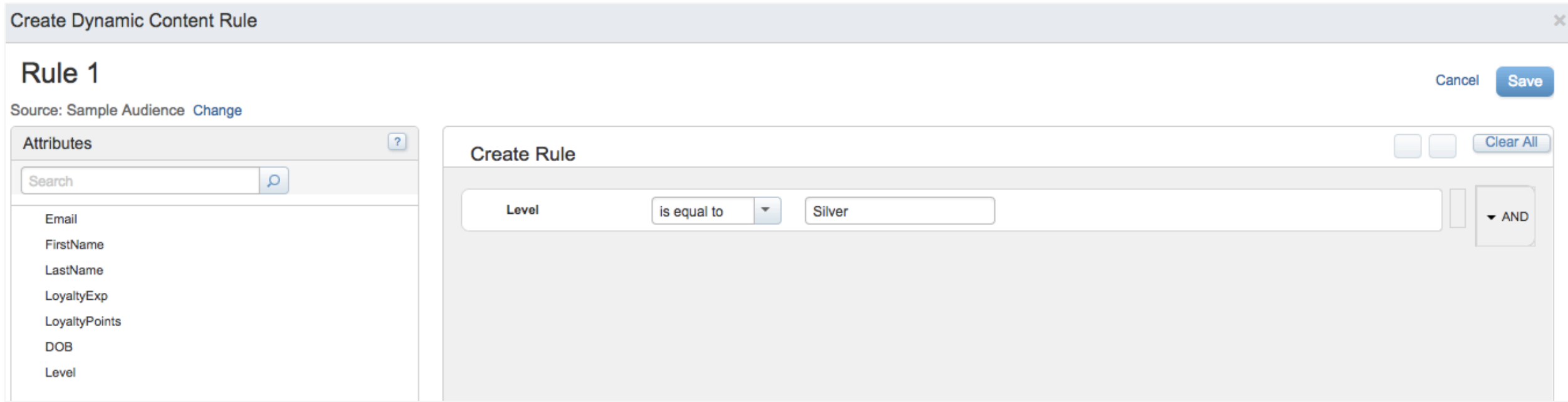
Climbing Adventure Meru via Shark's Fin Hike Through the Arctic Refuge

NOTE:



Dynamic Content can be used in emails for Journey Builder when the journey's audience (source) data extension is used to create the content.





Create Dynamic Content Rule

## Rule 1

Source: Sample Audience [Change](#)

Attributes ?

Search

- Email
- FirstName
- LastName
- LoyaltyExp
- LoyaltyPoints
- DOB
- Level

### Create Rule

Clear All

Level is equal to Silver

AND

Cancel Save

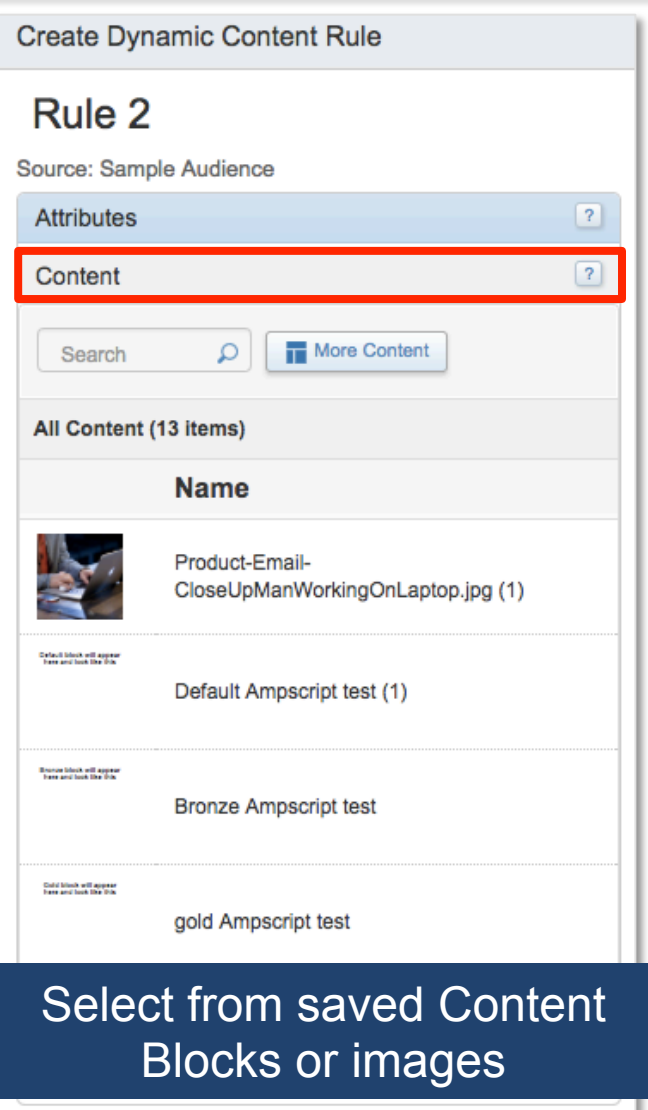
Drag and drop attributes from sidebar to configure rules.

- Need to know data values to create rules

Drag multiple attributes to create multiple conditions

- Hover at end of rule bars to join statements together
- Use AND/ OR operators to define logic for multiple conditions

The Content Tab allows you to select from existing content or create new content.



**Create Dynamic Content Rule**

**Rule 2**


Source: Sample Audience

Attributes ?

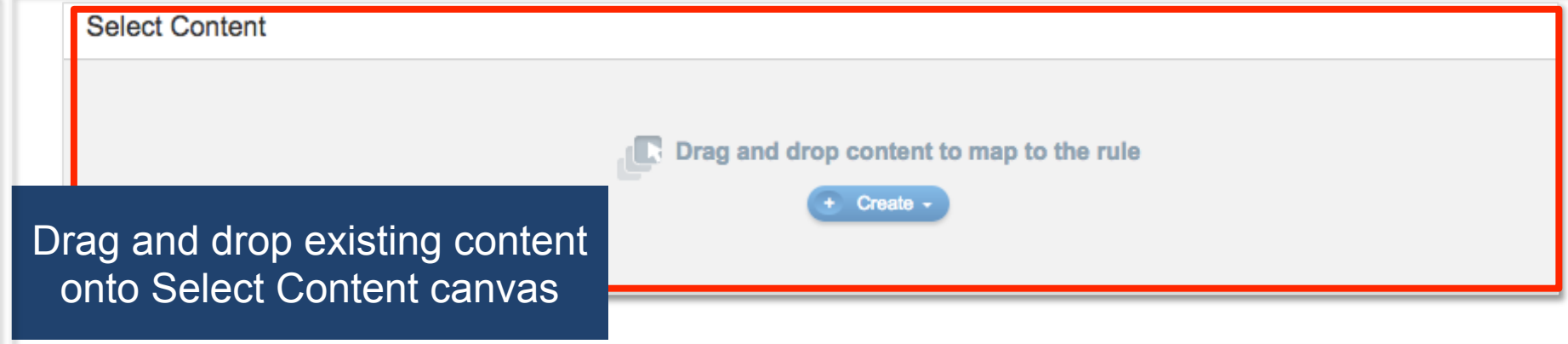
**Content** ?

Search  More Content

**All Content (13 items)**

Name	
	Product-Email-CloseUpManWorkingOnLaptop.jpg (1)
<small>Default block will appear here and look like this</small>	Default Ampscript test (1)
<small>Bronze block will appear here and look like this</small>	Bronze Ampscript test
<small>Gold block will appear here and look like this</small>	gold Ampscript test

Select from saved Content Blocks or images

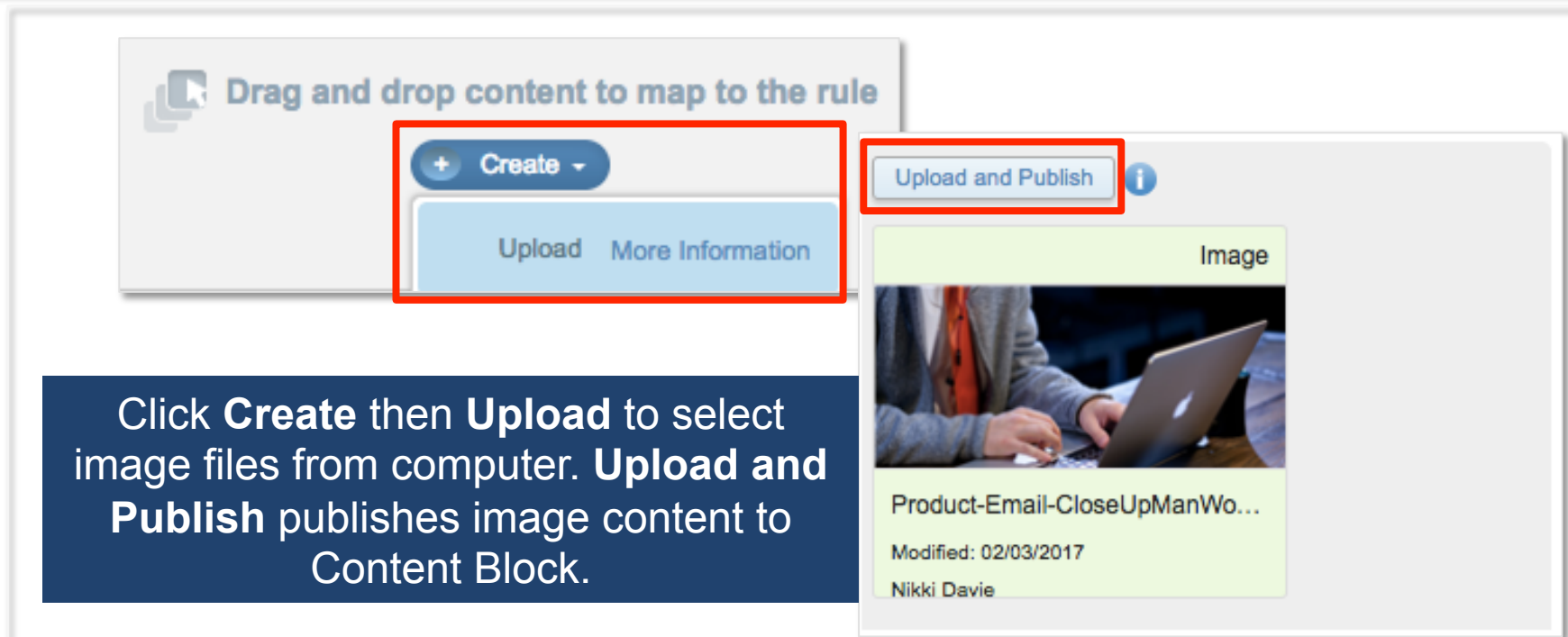


**Select Content**

Drag and drop content to map to the rule

+ Create

Drag and drop existing content onto Select Content canvas




Drag and drop content to map to the rule

+ Create

Upload More Information

Upload and Publish i

**Image**



Product-Email-CloseUpManWo...

Modified: 02/03/2017

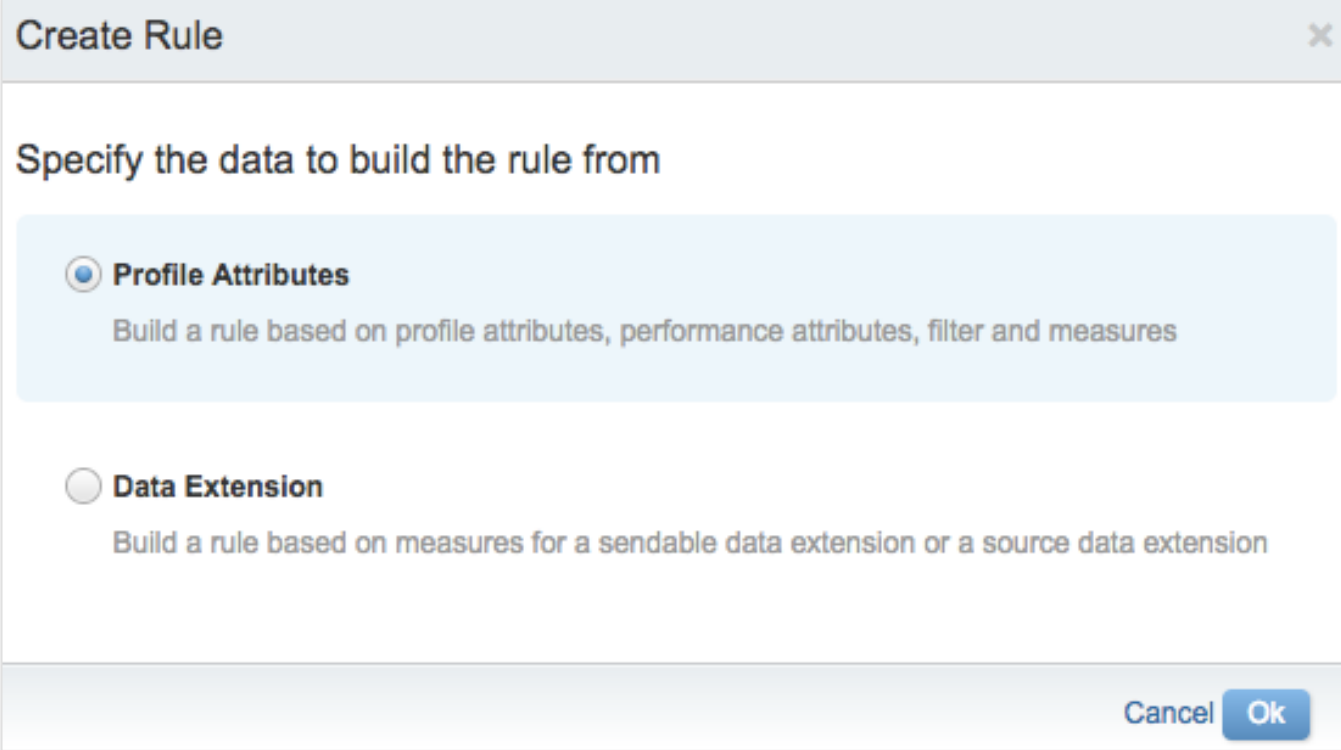
Nikki Davie

Click **Create** then **Upload** to select image files from computer. **Upload and Publish** publishes image content to Content Block.

## Select Profile Attributes when mapping dynamic content to Salesforce Data

### Profile Attributes:

- Can be created from the Parent business unit of an Enterprise account
- Must be created in the Email Application under Subscribers
- Align to standard objects on Salesforce.com records



**Create Rule** [X]

Specify the data to build the rule from

**Profile Attributes**  
Build a rule based on profile attributes, performance attributes, filter and measures

**Data Extension**  
Build a rule based on measures for a sendable data extension or a source data extension

Cancel **Ok**

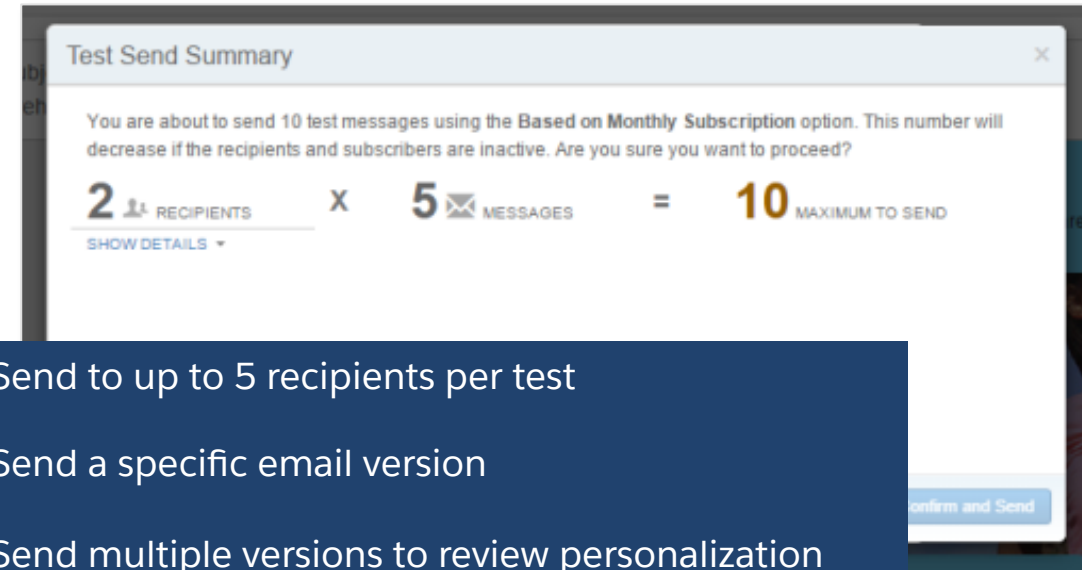
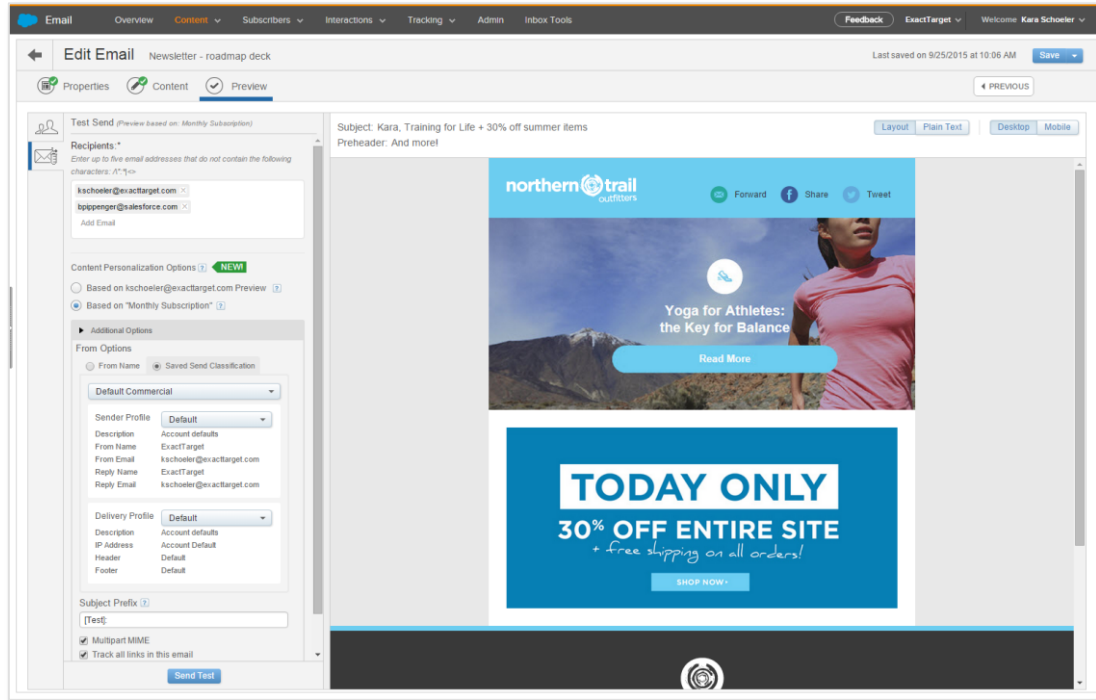
NOTE:



Dynamic Content can be used in emails for Journey Builder when the journey's audience (source) data extension is used to create the content.

# TESTING EMAILS





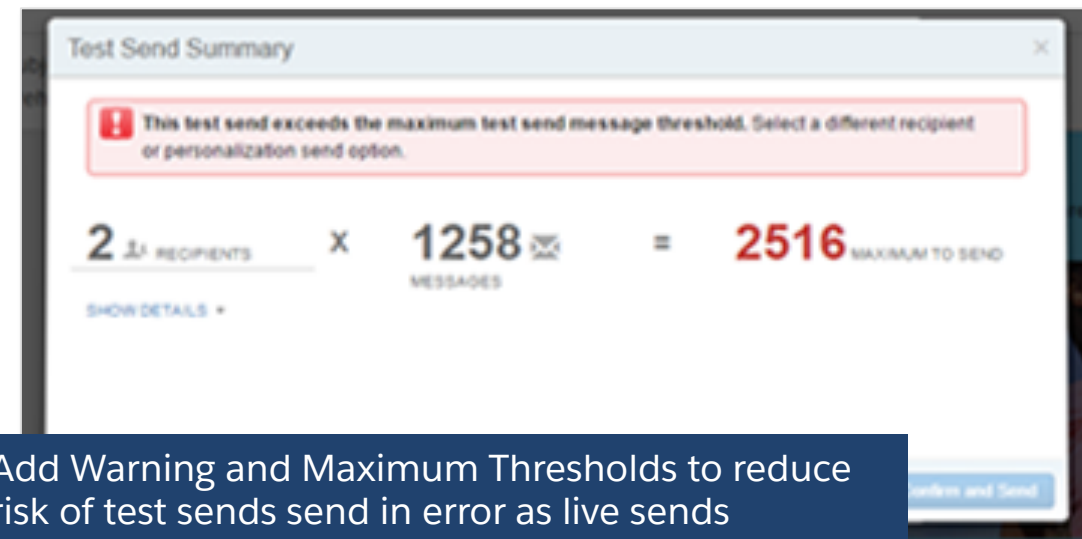
Send to up to 5 recipients per test

Send a specific email version

Send multiple versions to review personalization and ensure business logic configured correctly

Provides one location for all test sending tools

- Test Send
- Send Preview
- UI Test Send (Advanced Testing Option)



Add Warning and Maximum Thresholds to reduce risk of test sends send in error as live sends

## Send Preview

Preview the email in Content Builder as a recipient will see it

- View in Content Builder editor
- Ideal for rendering during build process

## Test Send

Sends 1 email as selected content would receive

- View in Inbox
- Ideal for reviewing static content
- Review rendering in Inbox

## UI Send

Sends 1 email per contact in selected audience

- View various versions of single email
- Ideal for dynamic content
- Data extension must be marked as **Testable**

NOTE:



Each of these testing tools displays personalization and dynamic content based on individual subscriber data.

# SENDING EMAILS IN EMAIL STUDIO



**Define Properties**

Revise and Define:

- Subject
- Preheader
- Send Classification

**Select Audience**

Define:

- Targeted audiences
- Excluded audiences
- Suppression Lists
- Excluded Domains

**Configure Delivery**

Define send time:

- Immediately
- Schedule for future date and time

**Review and Send**

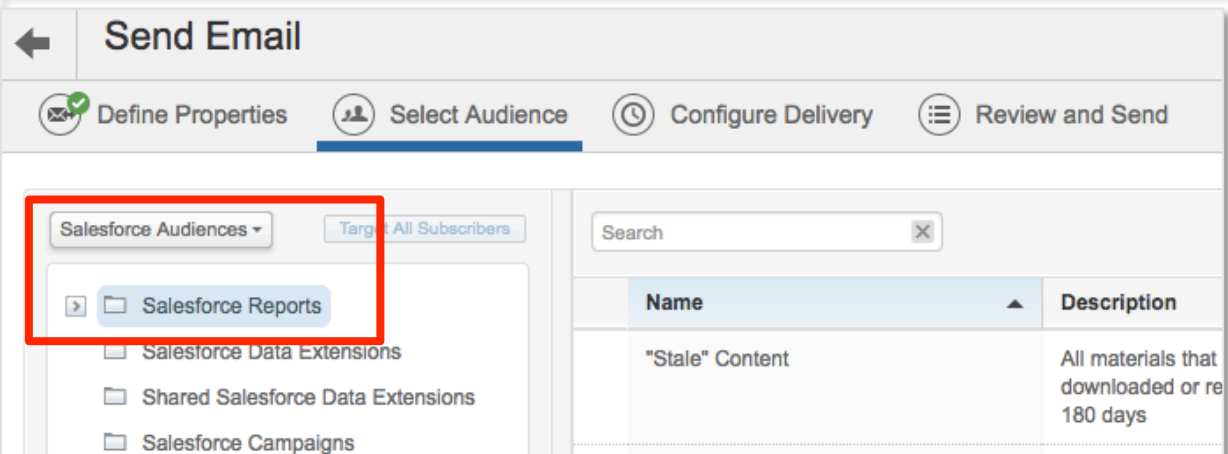
Review Audiences

Review Content

- Mobile view
- Desktop view
- Subject & Preheader

Confirm Send

## Salesforce Reports



Send Email

Define Properties | **Select Audience** | Configure Delivery | Review and Send

Salesforce Audiences ▼ Target: All Subscribers

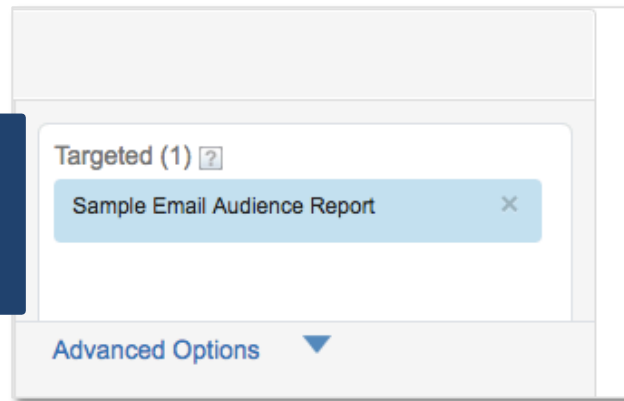
Search

Name	Description
"Stale" Content	All materials that downloaded or re 180 days

- ☑ Salesforce Reports
- ☐ Salesforce Data Extensions
- ☐ Shared Salesforce Data Extensions
- ☐ Salesforce Campaigns

All reports saved to Marketing Cloud Admin or Unfiled Public Reports folders appear in list, including reports that are not sendable.

Drag and drop selected report to **Targeted** field in right sidebar.

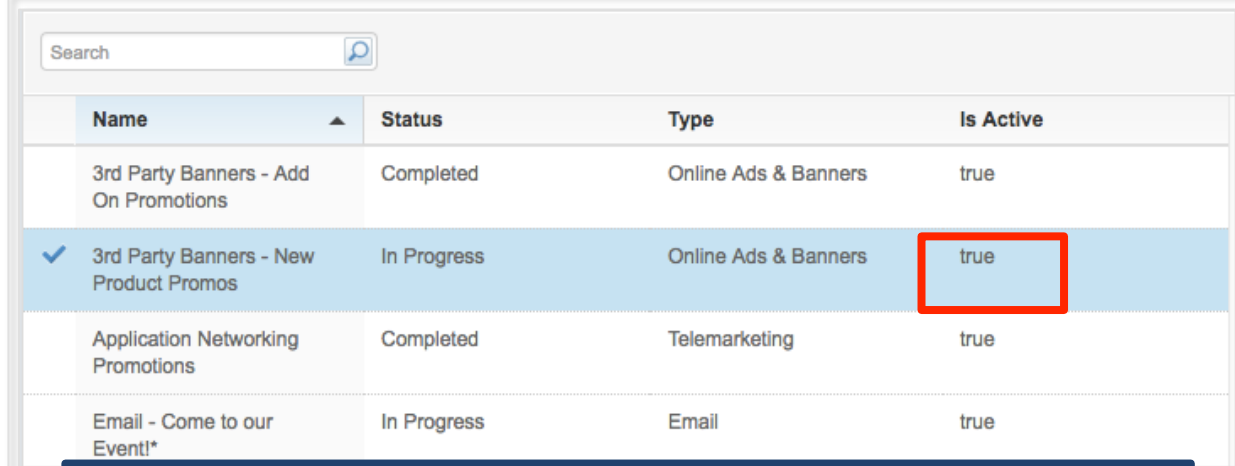


Targeted (1) ?

Sample Email Audience Report ✕

Advanced Options ▼

## Salesforce Campaigns

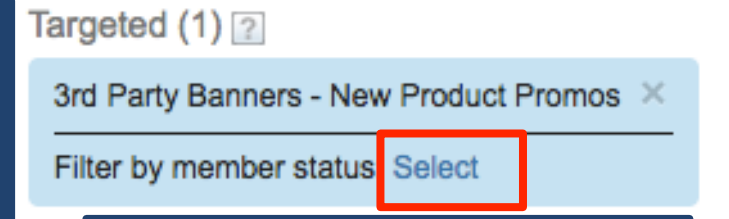


Search

Name	Status	Type	Is Active
3rd Party Banners - Add On Promotions	Completed	Online Ads & Banners	true
✓ 3rd Party Banners - New Product Promos	In Progress	Online Ads & Banners	true
Application Networking Promotions	Completed	Telemarketing	true
Email - Come to our Event!*	In Progress	Email	true

All Salesforce.com Campaigns appear in the list. Only those Campaigns with an **Active** status can be selected for sending in Marketing Cloud.

Drag and drop selected report to **Targeted** field in right sidebar.



Targeted (1) ?

3rd Party Banners - New Product Promos ✕

Filter by member status **Select**

Filter status options based on **Sent** or **Responded**

Q+A

