

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

CONNECT

Roche – Jan. 2018

Nikki Davie
Sr. Learning Consultant, Salesforce University
ndavie@salesforce.com

A small blue Twitter bird icon.

@SalesforceU



www.salesforce.com/training
© Copyright 2016 salesforce.com, inc.
All rights reserved. Various trademarks
held by their respective owners.

Safe harbor statement under the Private Securities Litigation Reform Act of 1995:

This document and other items we publish, including through social media outlets, may contain forward-looking statements, the achievement or success of which involves risks, uncertainties, and assumptions. If any such risks or uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make.

The risks and uncertainties referred to above include – but are not limited to – risks associated with possible fluctuations in our financial and operating results; our rate of growth and anticipated revenue run rate, including our ability to convert deferred revenue and unbilled deferred revenue into revenue and, as appropriate, cash flow, and our ability to grow deferred revenue and unbilled deferred revenue; errors, interruptions or delays in our service or Web hosting; breaches of our security measures; the financial impact of any previous and future acquisitions; the nature of our business model; our ability to continue to release, and gain customer acceptance of, new and improved versions of our service; successful customer deployment and utilization of our existing and future services; changes in our sales cycle; competition; various financial aspects of our subscription model; unexpected increases in attrition or decreases in new business; our ability to realize benefits from strategic partnerships; reliance on third-party computer hardware and software; the emerging markets in which we operate; unique aspects of entering or expanding in international markets; our ability to hire, retain and motivate employees and manage our growth; changes in our customer base;

technological developments; regulatory developments; litigation related to intellectual property and other matters, and any related claims, negotiations and settlements; unanticipated changes in our effective tax rate; factors affecting our outstanding convertible notes and credit facility; fluctuations in the number of shares we have outstanding and the price of such shares; foreign currency exchange rates; collection of receivables; interest rates; factors affecting our deferred tax assets and ability to value and utilize them, including the timing of achieving profitability on a pre-tax basis; the potential negative impact of indirect tax exposure; the risks and expenses associated with our real estate and office facilities space; and general developments in the economy, financial markets, and credit markets.

Further information on these and other factors that could affect the financial results of salesforce.com, inc. is included in the reports on Forms 10-K, 10-Q and 8-K and in other filings we make with the Securities and Exchange Commission from time to time, including our most recent Form 10-K. These documents are available on the SEC Filings section of the Investor Information section of our website at www.salesforce.com/investor.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

CONNECT: OVERVIEW & BASIC CONCEPTS



User access in both orgs affect what users can do in each cloud.

 marketing cloud
Marketing Cloud

 sales cloud  service cloud
Sales Cloud & Service Cloud

| | Marketing Cloud | Sales Cloud & Service Cloud |
|---|-----------------|-----------------------------|
| Account Configuration | ✓ | ✓ |
| Create Emails | ✓ | |
| Send Emails | ✓ | ✓ |
| Track Email Performance | ✓ | ✓ |
| Schedule Automated Sends | ✓ | |
| Create Target Audience (Report or Campaign) | ✓ | ✓ |

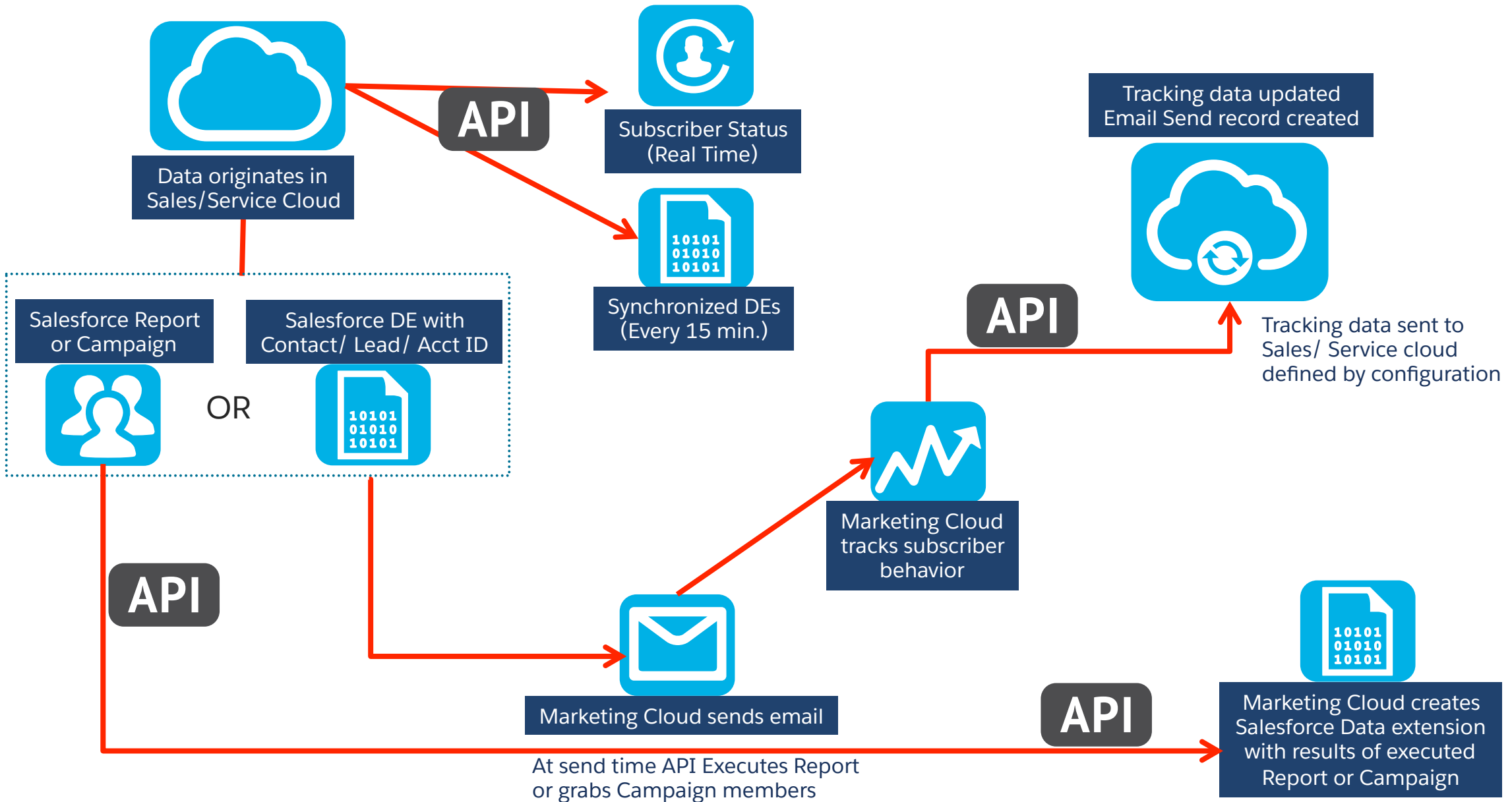
Supports sending to:

- Leads
- Contacts
- Accounts

18-character object ID required

- Subscriber Key for all Connect accounts
- Required on for sending on:
 - Sales/ Service Cloud Reports





Create emails
in Marketing
Cloud



Manage Data



Send Email



Track
Performance

NOTE:



Sending can be scheduled from either Marketing Cloud or Sales/ Service Cloud application. Automated sending only available in Marketing Cloud.



CONNECT: MANAGING DATA



SALES & SERVICE CLOUD: REPORTS



Drag & Drop Fields

- Add columns of data to report
- Filter report results based on values

Email Send Required fields :

- Object ID
- Email

Reports for email sends require ID and Email fields.

The screenshot shows the Salesforce report builder interface for a report titled "2016Q2_Midwest_Region_Contacts". The interface includes a "Fields" list on the left, a "Filters" section in the middle, and a "Preview" table at the bottom. Red annotations highlight key steps: "Available Fields" points to the field list; "Run Report" points to the "Run Report" button; "Filter Results" points to the filter configuration area; and "Preview Report Results" points to the data table.

| Contact ID | Email Opt Out | First Name | Last Name | Mailing City | Mailing State/Province | Mailing Zip/Postal Code | Email |
|-----------------|--------------------------|------------|-----------|-----------------|------------------------|-------------------------|---|
| 00361000005lw05 | <input type="checkbox"/> | Indira | Mccormack | Gilman | WI | 54433 | imccormack.10048.0974@yahoo.exacttargettest.com |
| 00361000005lw0A | <input type="checkbox"/> | Evangelina | Samples | Kansas City | MO | 64158 | esamples.10048.0979@hotmail.exacttargettest.com |
| 00361000005lw0F | <input type="checkbox"/> | Kim | Salcedo | Mount Blanchard | OH | 45867 | ksalcedo.10048.0984@gmail.exacttargettest.com |
| 00361000005lw0Q | <input type="checkbox"/> | Bettie | McMahon | Rosebud | MO | 63091 | bcmahan.10048.0995@gmail.exacttargettest.com |
| 00361000005lw0R | <input type="checkbox"/> | Roslyn | Casas | Coshocton | OH | 43812 | rcasas.10048.0996@hotmail.exacttargettest.com |

BEST PRACTICE:



Include the field filter “Email Opt-Out equals false” to include only subscribed contacts on reports used for commercial sends.



SENDING EMAILS

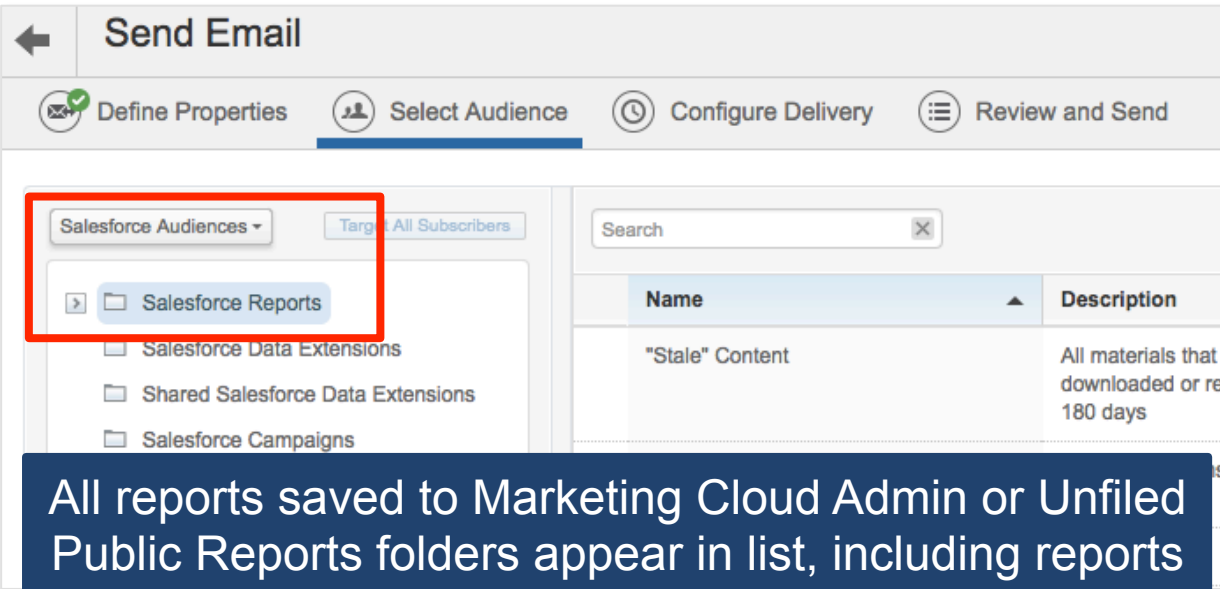


CONNECT:
SENDING TO REPORTS &
CAMPAIGNS VIA SEND FLOW
IN EMAIL STUDIO



Salesforce Reports

Salesforce Campaigns

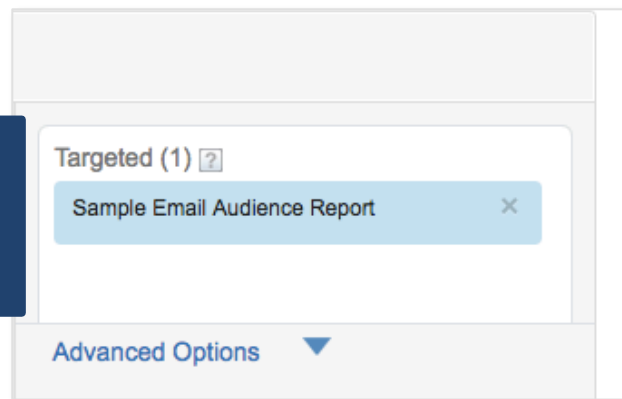


All reports saved to Marketing Cloud Admin or Unfiled Public Reports folders appear in list, including reports that are not sendable.

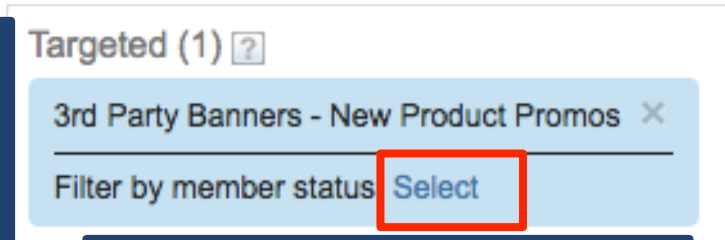
| Name | Status | Type | Is Active |
|--|-------------|----------------------|-----------|
| 3rd Party Banners - Add On Promotions | Completed | Online Ads & Banners | true |
| ✓ 3rd Party Banners - New Product Promos | In Progress | Online Ads & Banners | true |
| Application Networking Promotions | 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.



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



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



REPORTING & ANALYTICS TRACKING & REPORTING AVAILABLE



CONNECT: EMAIL SENDS TRACKING




Double-click on Email Sends tab

Review:

- Send Definition
- Tracking Metrics
- Subscriber Info
- Individual Email Results
- Aggregated Link Level Details

Tracking Info

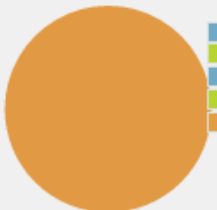
Job Id: 12287989
Name: NTO Service Follow Up
 ([Analytics for this Email](#))
Subject: Thank You for Contacting NTO!
Date Sent: 9/15/2014 1:27 PM
Total Sent: 1
Tracking as of: 9/15/2014 2:27 PM
Tracking Subscription Expiration: 9/20/2014



Send Performance

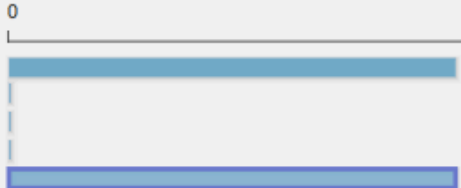
Delivery Rate: 100.0%

| | |
|------------------|---|
| Total Bounces: | 0 |
| Hard Bounce: | 0 |
| Soft Bounce: | 0 |
| Total Delivered: | 1 |



Activity


| | Total | Unique |
|-----------------|-------|--------|
| Opens | 1 | 1 |
| Clicks | 0 | 0 |
| Forwards | - | 0 |
| Unsubscribed | - | 0 |
| Total Delivered | - | 1 |



Open Performance

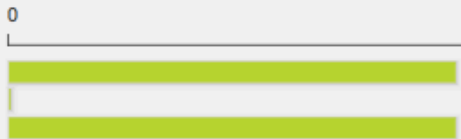
Open Rate: 100.0%

| | |
|---------------|---|
| Delivered: | 1 |
| Total Opens: | 1 |
| Unique Opens: | 1 |



Unengaged Subscribers

| | Unique |
|---------------|--------|
| Did not click | 1 |
| Did not open | 0 |
| Delivered | 1 |



Related Individual Email Result Reports

[Sent](#) [Opened](#) [Clicked](#) [Hard Bounced](#) [Delivered](#) [Did not open](#) [Did not click](#) [Soft Bounced](#)

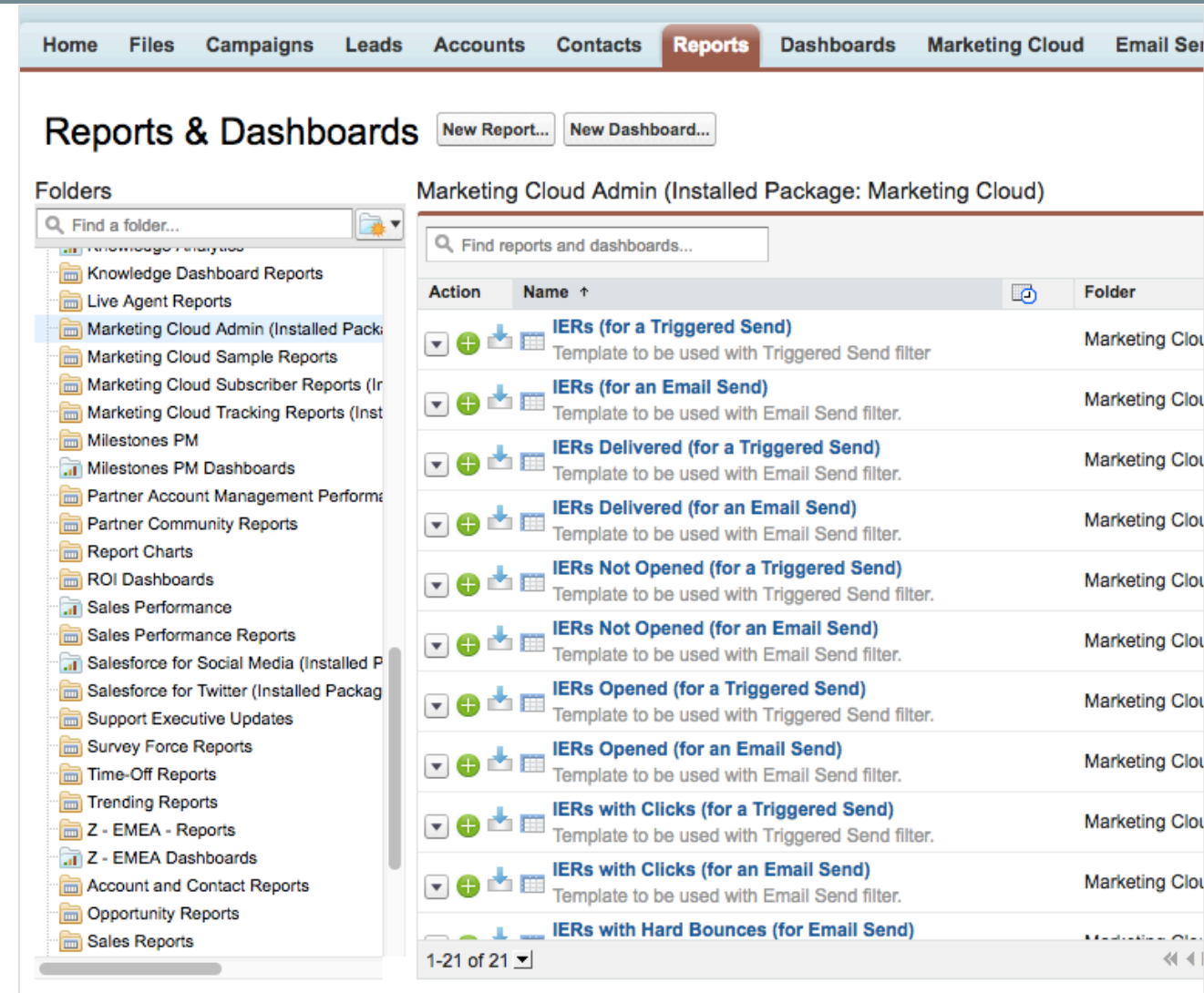
CONNECT: MARKETING CLOUD REPORTS INSTALLED PACKAGE



Cloud Connect installs the Marketing Cloud Reports package.

3 Report Folders Installed:

- Marketing Cloud Admin
- Marketing Cloud Subscriber Reports
- Marketing Cloud Tracking Reports



The screenshot displays the Salesforce Reports & Dashboards interface. The top navigation bar includes Home, Files, Campaigns, Leads, Accounts, Contacts, Reports (highlighted), Dashboards, Marketing Cloud, and Email Services. The main heading is "Reports & Dashboards" with buttons for "New Report..." and "New Dashboard...".

On the left, a "Folders" sidebar shows a search bar "Find a folder..." and a list of folders. The "Marketing Cloud Admin (Installed Package)" folder is selected and highlighted in blue. Other folders include Knowledge Dashboard Reports, Live Agent Reports, Marketing Cloud Sample Reports, Marketing Cloud Subscriber Reports (Installed Package), Marketing Cloud Tracking Reports (Installed Package), Milestones PM, Milestones PM Dashboards, Partner Account Management Performance Reports, Partner Community Reports, Report Charts, ROI Dashboards, Sales Performance, Sales Performance Reports, Salesforce for Social Media (Installed Package), Salesforce for Twitter (Installed Package), Support Executive Updates, Survey Force Reports, Time-Off Reports, Trending Reports, Z - EMEA - Reports, Z - EMEA Dashboards, Account and Contact Reports, Opportunity Reports, and Sales Reports.

On the right, the "Marketing Cloud Admin (Installed Package: Marketing Cloud)" section features a search bar "Find reports and dashboards...". Below it is a table listing reports:

| Action | Name ↑ | Folder |
|--------|---|-----------------|
| + | IERs (for a Triggered Send) Template to be used with Triggered Send filter | Marketing Cloud |
| + | IERs (for an Email Send) Template to be used with Email Send filter. | Marketing Cloud |
| + | IERs Delivered (for a Triggered Send) Template to be used with Email Send filter. | Marketing Cloud |
| + | IERs Delivered (for an Email Send) Template to be used with Email Send filter. | Marketing Cloud |
| + | IERs Not Opened (for a Triggered Send) Template to be used with Triggered Send filter. | Marketing Cloud |
| + | IERs Not Opened (for an Email Send) Template to be used with Email Send filter. | Marketing Cloud |
| + | IERs Opened (for a Triggered Send) Template to be used with Triggered Send filter. | Marketing Cloud |
| + | IERs Opened (for an Email Send) Template to be used with Email Send filter. | Marketing Cloud |
| + | IERs with Clicks (for a Triggered Send) Template to be used with Triggered Send filter. | Marketing Cloud |
| + | IERs with Clicks (for an Email Send) Template to be used with Email Send filter. | Marketing Cloud |
| + | IERs with Hard Bounces (for Email Send) | Marketing Cloud |

At the bottom of the table, it shows "1-21 of 21" reports.



Easily create reports to retarget customers based on email recipient behavior using Admin reports in Salesforce Report Builder.

IER = Individual Email Results

| Marketing Cloud Admin | Description |
|--|---|
| IERs (for an Email Send) | Template to be used with Email Send filter. |
| IERs Delivered (for an Email Send) | Display the emails delivered (no bounces) |
| IERs Not Opened (for an Email Send) | Display the emails delivered but not opened |
| IERs Opened (for an Email Send) | Give the list of the emails opened |
| IERs with Clicks (for an Email Send) | Track and display the email with at least one click |
| IERs without Clicks (for an Email Send) | Track and display the email without clicks |
| IERs with Soft Bounces (for an Email Send) | Display the email and the contact associated to a soft bounce |
| IERs with Hard Bounces (for an Email Send) | Display the email and the contact associated to a hard bounce |
| Outstanding Sends | List of emails that are pending |

| Marketing Cloud Subscriber Reports | Description |
|------------------------------------|--|
| Campaign Performance over Time | To provide information about the number of subscribers over a period of time for a specific campaign |
| Email Sends by User over Time | Display email sends per user on the account in a specific time period and the report/campaign associated to it |
| Subscriber Engagement over Time | Analyse subscribers who are most actively engaged |
| Unengaged Subscribers over Time | Unresponsive subscribers |

| Marketing Cloud Tracking Reports | Description |
|----------------------------------|---|
| Recent Email Sending Summary | Provides tracking information for each send generated within a specific time period |

CONNECT: SEND ANALYTICS

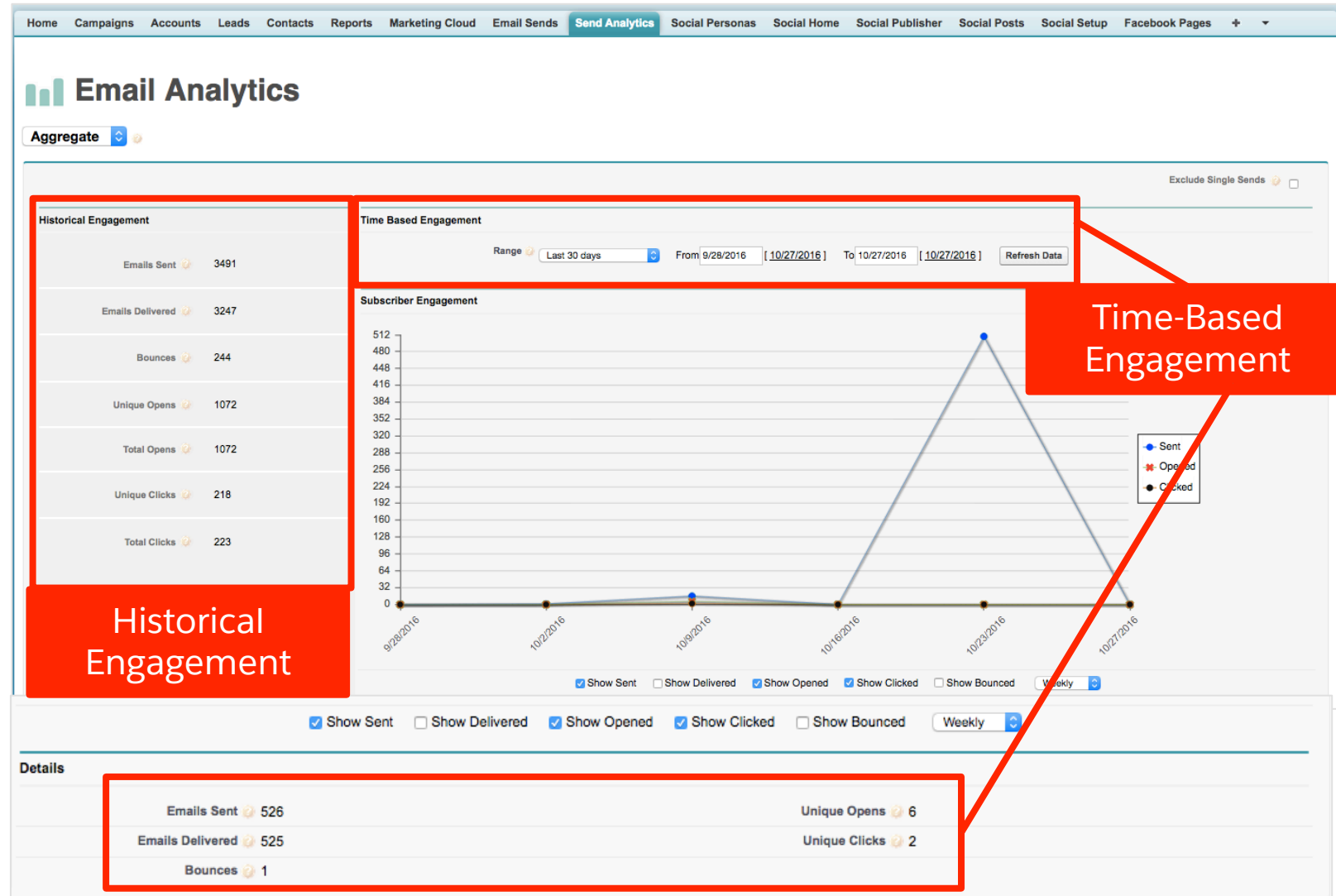


Historical Engagement

- Displays all-time data

Time Based Engagement

- Displays data for a specified period of time



NOTE:



Marketing Cloud tracking data stored in Salesforce is available as a graphical display of historical and time-based engagement.

Aggregate tracking data for all sends

- Set date ranges

Specific subscriber's activities

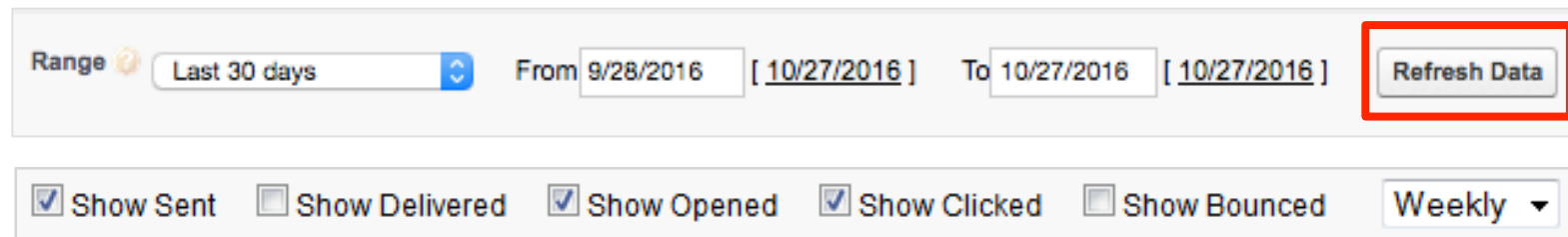
- Search by email address


Specific email send activities

- Review a specific email send



- Easily identify trends in subscriber behavior and email performance
- Refresh Data button fires API to bring in updated metrics
- Checkboxes allow for easy toggling of the available display options



DEFINITION:  Enhanced Send Analytics provide a clean and intuitive user experience to gain critical insight into email performance and subscriber behavior.

salesforce

DATA EXTENSIONS

STORING DATA IN MARKETING CLOUD

 @SalesforceU



www.salesforce.com/training
© Copyright 2016 salesforce.com, inc.
All rights reserved. Various trademarks
held by their respective owners.

Why use data extensions?

Use for dynamic content to store data that is not sensitive (ex: campaign code)

- Data stored on data extensions *will not be encrypted* in Marketing Cloud

What data is essential to store on a data extension?

PersonID from Salesforce is necessary to include on a data extension

- PersonID allows subscriber open and click behavior to be sent to Salesforce for reporting

Create Data Extension

Create New

Copy Existing



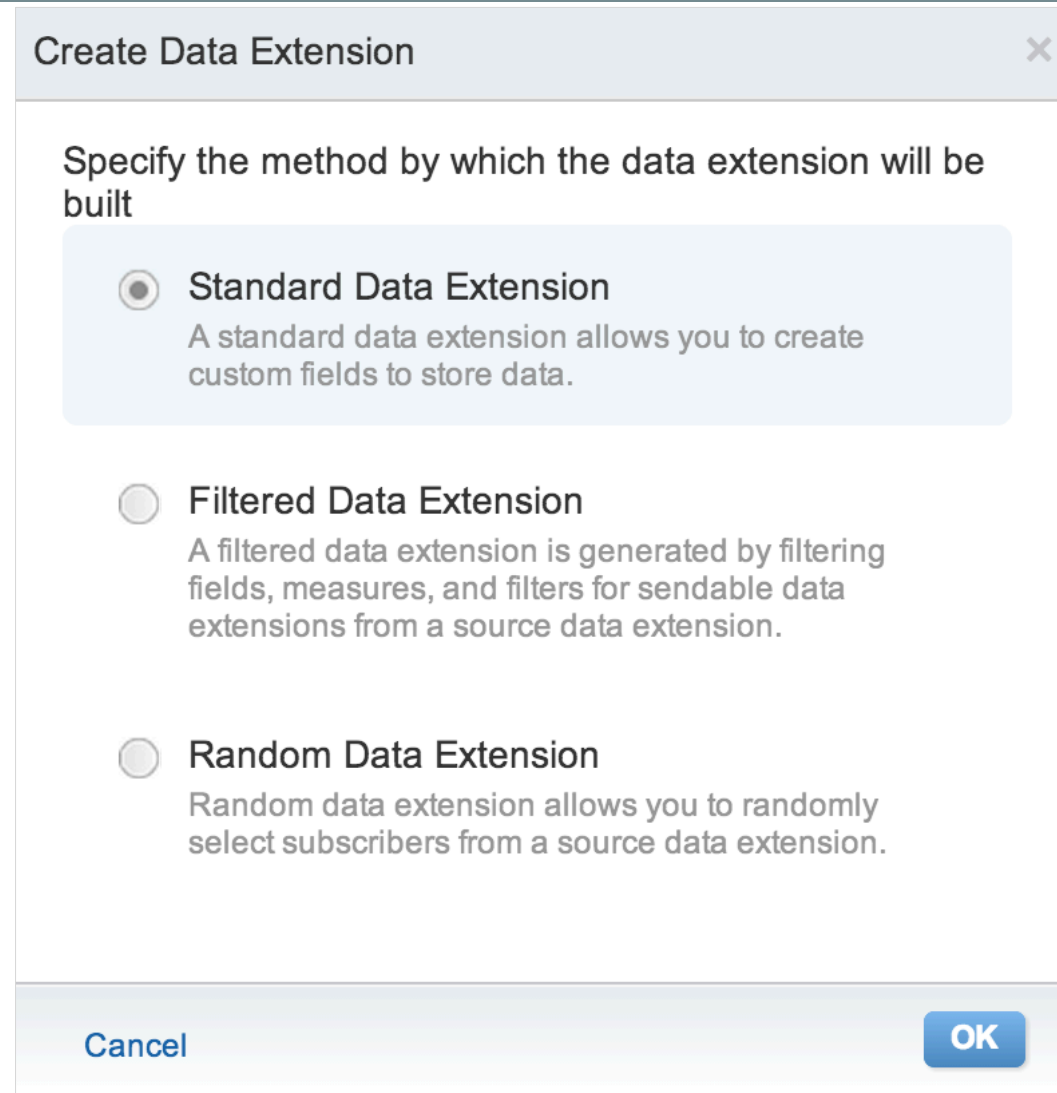
Populate Data Extension

Import Using Wizard

Standard: Creates a new data extension

Filtered: Based on conditions and data from an existing data extension

Random: Define a number of percentage of subscribers on an existing data extension



Create Data Extension ✕

Specify the method by which the data extension will be built

- Standard Data Extension**
A standard data extension allows you to create custom fields to store data.
- Filtered Data Extension**
A filtered data extension is generated by filtering fields, measures, and filters for sendable data extensions from a source data extension.
- Random Data Extension**
Random data extension allows you to randomly select subscribers from a source data extension.

Cancel OK

NOTE:



A standard data extension must exist in order to create a Random or Filtered data extension.

WHAT DATA TYPES ARE AVAILABLE?

Text

Contains a combination of letters, numbers, and spaces. 4000 character max.

Number

Countable numeric value only. Accepts values from -2,147,483,648 to 2,147,483,648.

Date

System date. Always stored in the format MM/DD/YYYY.

Boolean

True or False value.

Email Address

Required field on sendable data extensions. Syntax is checked when importing data.

Phone

Accepts strings with 10 or 11 digits and strips out non-digit characters.

Decimal

Numeric value with a decimal point.

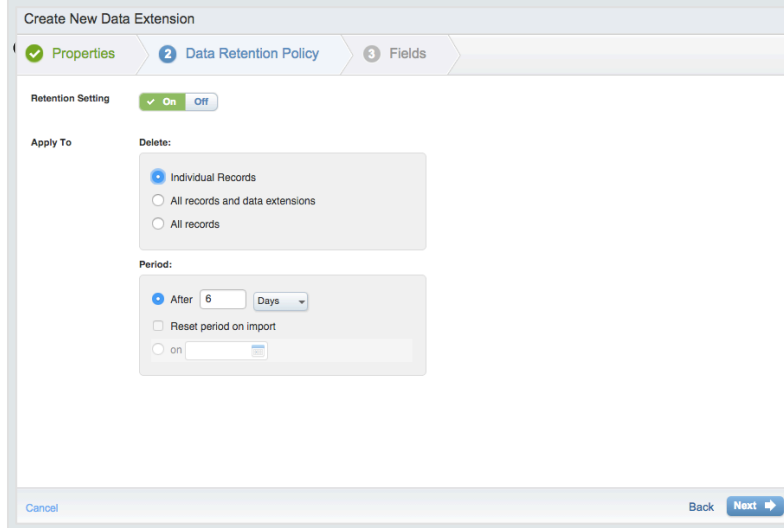
Locale

ISO language and country code.

Data retention prevents storing outdated or unused data in an account.

Individual Records

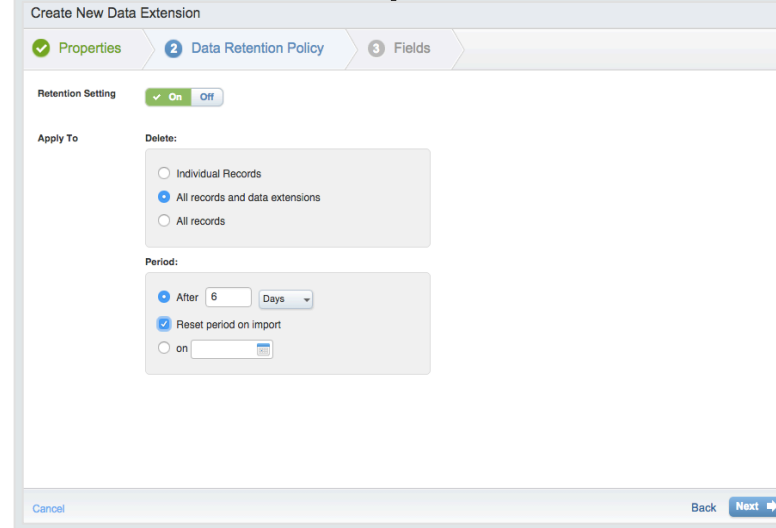
- Retains data extension
- Deletes individual records at defined intervals



The screenshot shows the 'Data Retention Policy' configuration for 'Individual Records'. The 'Retention Setting' is turned 'On'. Under 'Apply To', the 'Delete' section has 'Individual Records' selected. The 'Period' section is set to 'After 6 Days', with 'Reset period on import' checked and 'on' set to a date field.

All Records

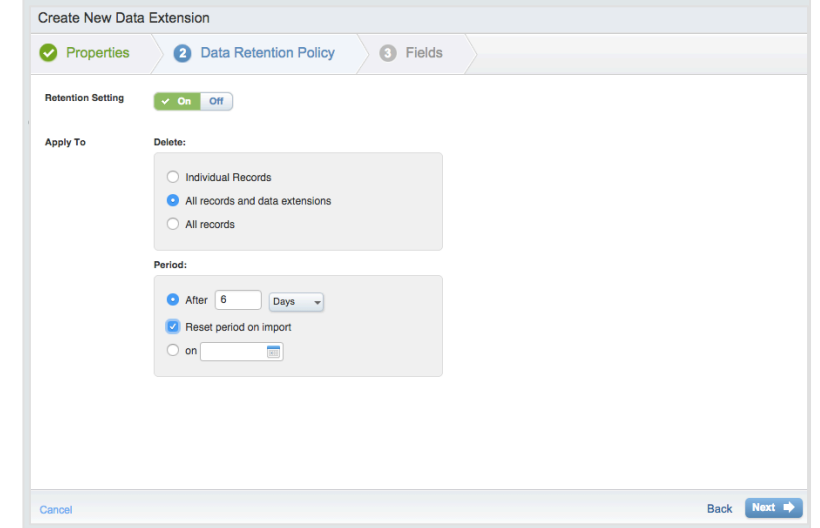
- Retains data extension
- Deletes all records stored on table
- Can reset period on



The screenshot shows the 'Data Retention Policy' configuration for 'All Records'. The 'Retention Setting' is turned 'On'. Under 'Apply To', the 'Delete' section has 'All records and data extensions' selected. The 'Period' section is set to 'After 6 Days', with 'Reset period on import' checked and 'on' set to a date field.

All Records and Data Extensions

- Deletes entire data extension
- Deletes all records



The screenshot shows the 'Data Retention Policy' configuration for 'All Records and Data Extensions'. The 'Retention Setting' is turned 'On'. Under 'Apply To', the 'Delete' section has 'All records and data extensions' selected. The 'Period' section is set to 'After 6 Days', with 'Reset period on import' checked and 'on' set to a date field.

DATA EXTENSIONS: IMPORTING DATA



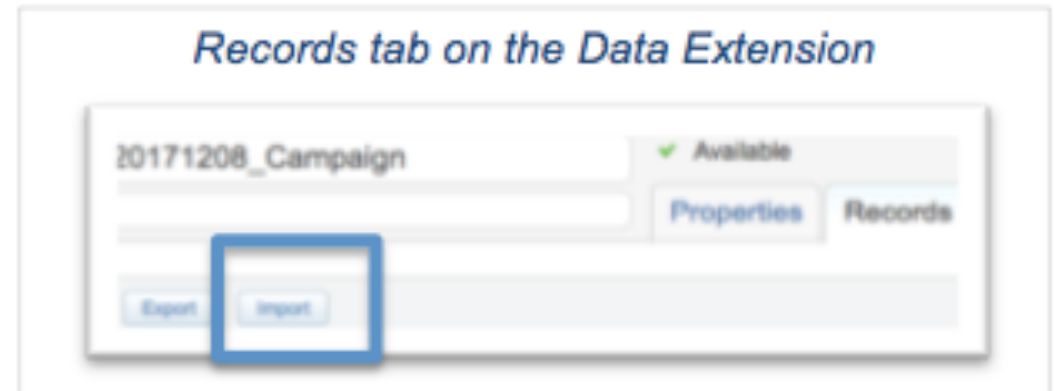
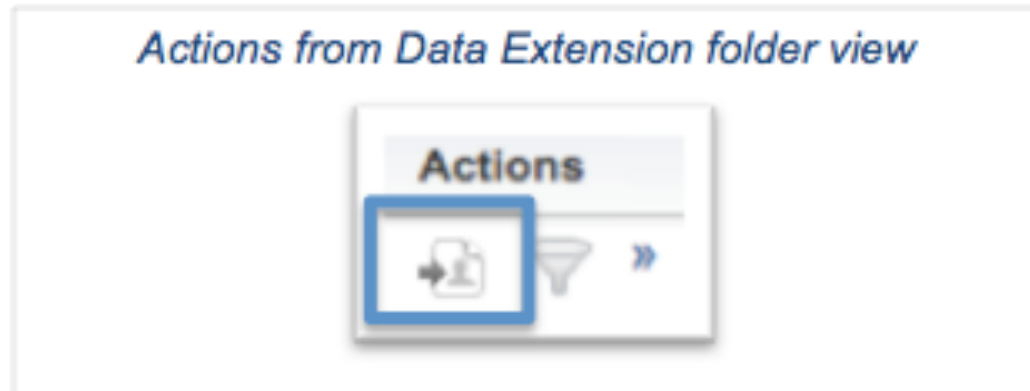
About the Import Wizard

Import data from FTP or local computer

Wizard screen walks user through configuration

Manual, one-time import

2 Locations to Access the Import Wizard



Q+A

