

# Introduction & Navigation

## Logging In to Marketing Cloud

1. Open a tab in either the **Chrome** or **Firefox** web browser.
2. Place your cursor in the URL bar then type **mc.exacttarget.com**.
3. Strike the **Enter** or **Return** key.
4. Type your **Username** in the space provided.
5. Type your **Password** in the space provided.
6. Click the **Login** button.
7. If prompted to activate your account, click the **Send Activation Email** button.
8. Navigate to your email account to retrieve the **Activation Code**.
9. Type the **Activation Code** in the space provided.
10. Click the **Submit** button.

## Set Password Challenge Questions (*First Time Log In Only*)

1. Click on the first dropdown to view **Challenge Question** options.
2. Click on a question as desired to select it.
3. In the **First Security Answer** space, type the answer to the selected question.
4. Repeat steps 2 & 3 for the remaining 2 Challenge Questions.
5. Click the **Finish** button.

## Manage User Settings

1. In the upper right corner of the screen, hover over **Welcome, Your Name**.
2. From the dropdown that appears, click **Cloud Preferences**.
3. Click **Edit** in the toolbar.
4. Update information as appropriate.
5. Click the **Save** button in the toolbar.
6. Click **Change Password**.
7. Type your **Old Password** in the space provided.
8. Type a **New Password** in the space provided then retype the new password in the **Verify New Password** field.
9. Click the **Save** button in the toolbar.
10. Click **Change Security Questions**.
11. Select new questions from each dropdown.
12. Type security answers corresponding to each question.
13. Click the **Save** button in the toolbar.



## Manage Cloud Preferences

1. Click the **Default Login Preference** tab.
2. Select the radio button for the desired application that will you will log in to by default as of your next Marketing Cloud session.
3. Click the blue **Save** button.

## Create an Event on the Marketing Cloud Calendar

1. Hover in the upper left corner of the screen over **Cloud Preferences**.
2. Click on the **Calendar** tab.
3. Hover on **today's date**.
4. Click **+Add Event**.
5. Type an appropriate **Name** for the event in the space provided.
6. Type an appropriate **Description** in the space provided (optional).
7. Click **No Campaign Associated** and select an appropriate Campaign (optional).
8. Click the blue **multi-day event** link then select **From** and **To** dates
9. Click **Save**.

## Navigate to Another Business Unit

1. Hover over the current **Business Unit Name** in the persistent toolbar.
2. Click on the appropriate business unit name.

*The majority of Roche users will only have access to one business unit.*

**Caution:** Save all work before navigating to a new business unit.

**Note:** A user may only be logged in to a single business unit per browser at a time.

# Marketing Cloud Campaigns

## Create a Marketing Cloud Campaign

1. Hover in the upper left corner of the screen over **Cloud Preferences**.
2. Click on the **Campaigns** tab.
3. Click the blue **Create Campaign** button in the upper-right corner of the screen.
4. Name the Campaign **[Name] Training**.
5. Enter a **Description** (optional).
6. Click on the **Calendar Color** dropdown and select a color.
7. In the **Deployment Date** field, click on the calendar icon to select the start date of the campaign (optional).
8. In the **Campaign Owner** field, search for your name then click to select it (optional).
9. Click the **Create** button.

## Associate Assets to a Campaign from Campaigns tab

1. Click on the **Associate to Campaign** button in the upper-right corner of the screen.
2. Select the appropriate type of asset to associate from the dropdown.
3. Navigate to the appropriate item(s) you wish to associate.
4. Click to add item(s), then click **OK**.

## Run a Marketing Cloud Campaigns Report

1. Using the App Switcher by hovering in the upper-left window of your screen, navigate to the **Analytics Builder** dropdown and click **Reports**.
2. Click on the **Catalog** tab from the black toolbar.
3. Using the filters at left, locate the **Tools and Apps** section then check the box for **Campaigns**.
4. Locate the Campaigns Report you wish to run, then click the **Run** button to the right.
5. Configure the **Report Parameters** as desired then click **Submit**.
6. Review the report on screen.
7. Click **Save**.
8. Enter a **Name** for the report.
9. Enter a report **Description** (optional) then click **Save**.
10. Using the icons at top, select the appropriate output mechanism.
11. Configure as desired then click **Save**.

*The Campaigns reports relevant to are indicated with this icon.*

## Marketing Cloud Campaign Reports Available

### Campaign Email Job Tracking Summary

- Campaign- specific
- Lifetime of Campaign
- Cumulative across email sends (jobs) per email
- Metrics display by email name

### Campaign Email Tracking

- Campaign- specific
- Specified date range
- Displays metrics of all sends per email in campaign
- Provides totals across all emails and sends in campaign during timeframe

### Campaign Email Tracking Summary

- Campaign- specific
- Lifetime of Campaign
- Summarizes cumulative performance of each email in Campaign across sends
- Provides totals across all emails in campaign over lifetime

### Multi-Campaign Email Tracking Summary

- Specified date range
- Displays cumulative performance across campaigns
- Summarizes metrics by Campaign name

# Marketing Cloud Connect

## *Managing Data via Connect*

### Create a Custom Report for an Email Send

1. Navigate to the **Reports Tab**.
2. Click on **New Report**.
3. For **Report Type**, select the **Accounts & Contacts** from within the **Accounts & Contacts** folder or any in the **Leads** folder.
4. Click **Create** from the lower right corner of the window.
5. In the **Quick Find** box in the **Fields** sidebar, type **ID**.
6. Drag and drop the appropriate object ID into the report to add the column.
7. In the **Quick Find** box in the **Fields** sidebar, type **Email**.
8. Check the report columns to ensure **Email** is included. (If not on the report, drag it onto the report)
9. Apply filters as desired.
10. Click **Save**.
11. Name your report.
12. From the **Report Folder** dropdown, select either the **Unfiled Public Reports** or **Marketing Cloud Admin** folder.

*It is common to filter for email opt-ins or for opt-ins based on a specific email preferences, like a newsletter opt-in.*

### Create a Report for an Email Send from an Existing Report

1. Navigate to the **Reports Tab**.
1. Search for the desired report in the **Find a Folder** box then click on the appropriate folder.
2. Click on the **Report Name**.
3. Click **Save As**.
4. Name your report.
5. From the **Report Folder** dropdown, select either the **Unfiled Public Reports** or **Marketing Cloud Admin** folder.
6. Click **Save & Return to Report**.
7. Click **Customize**.
8. Ensure the **ID** field is on the report for the **Contact, Lead, Account, or Person**.
9. Add the **Email** friend if not already on the report.
10. Add or modify filters as necessary.
11. Click **Run Report**.
12. Click **Save**.



## *Sending Emails*

### **Send an Email via Send Flow**

1. In the **Email application**, navigate to the **Content** tab.
2. Select **Use Content Builder** from the top left side of the screen if Classic Content displays.
3. Click on the name of your email.
4. Review the **Details** pane at left and review the content under the **Preview** pane at right.
5. From the upper right corner, click the **Send** button.
6. Review your **Subject** and **Preheader**.
7. Click the **Saved Send Classification** tab and select the appropriate Send Classification.
8. Check the boxes to **Override Sender and Delivery Profiles** (if necessary) then choose the appropriate profile from the dropdown.
9. Click **Next** in the upper right corner.
10. Under the **Select Audience** window, navigate to the appropriate **data extension**, **Salesforce Report**, or **Salesforce Campaign**.
11. Drag and drop the audience to the **Targeted** field at right.
12. Click **Next** without selecting a Publication List.
13. Define the **Exclusion** data extension, Report, or Campaign (if necessary).
14. Click **Next**.
15. Under the **Configure Delivery** screen, select the **Schedule** radio button and schedule your send **Date** and **Time** as desired.
16. Check the boxes to **Track clicks** and **Send Tracking Results to Sales Cloud**.
17. Check the boxes for **Send as Multi-part MIME** and **Send to Deliverability Seed List**.
18. Under **Tracking Destination Folder**, select the appropriate folder.
19. Click **Next** from the upper-right corner.
20. Review the send information in the left pane of the screen *carefully*.
21. Review the content in **Mobile** and **Desktop View** in the right pane.
22. Check the box to verify **This information is correct and this email is ready to send**.
23. Click **Schedule** in the upper-right corner.



## *Tracking Performance*

### **Salesforce Send Tracking**

1. Double-click on the **Email Sends** tab in your Salesforce instance.
2. Click on the email send in question.
3. Scroll down to view **Tracking Info**, **Subscriber Info**, **Individual Email Results**, and **Aggregate Link Level Details**.

### **Salesforce Send Analytics**

1. Click on the **Send Analytics** tab in your Salesforce instance.
2. From the dropdown in the upper left corner, select from the following to view analytics:
  - **Subscriber** – Search for an individual subscriber to view engagement.
  - **Aggregate** – Across multiple sends
  - **Email** – Performance of a particular email (creative) across sends
3. Adjust the date ranges in the **Time Based Engagement** area then click the **Refresh Data** button.
4. View tracking metrics on the left sidebar.

### **Marketing Cloud Installed Reports Package**

1. Click on the **Reports** tab.
2. Click on one of the following **Marketing Cloud** reports folders:
3. Click on a report then click **Save As** to copy the report.
4. Customize as desired.
5. **Save** the report.
6. Click **Run Report** to generate results on screen.

# Data Extensions

## Using Data Extensions for One-Off Emails

### Create a Data Extension

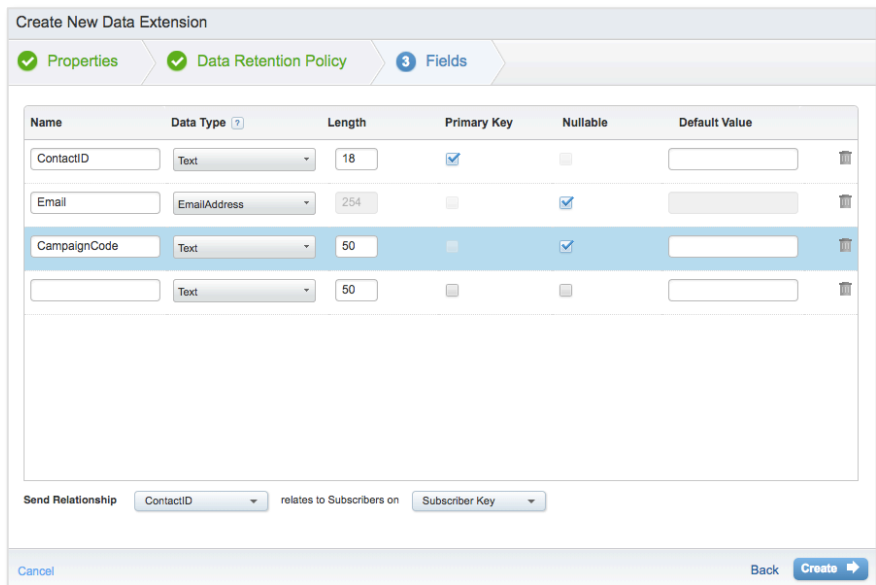
1. Using the **App Switcher**, navigate to the **Email application** from the **Email Studio** menu.
2. In the black toolbar hover on **Subscribers** then choose **Data Extensions** from the menu.
3. Choose the appropriate folder where the data extension will be saved.
4. Click the blue **Create** button in the upper-right corner.
5. Select the **Standard Data Extension** radio button then click **OK**.
6. Type an appropriate name for the data extension in the **Name** field.
7. Enter an appropriate **Description** field.
8. Check the **Is Sendable** checkbox.
9. If the data extension will contain data used for testing emails, check the **Is Testable** checkbox.
10. Associate the data extension with a **Campaign** (if appropriate).
11. Click the **Next** button in the lower right corner.
12. Keep **Data Retention** marked as **Off** then click **Next**.
13. Configure the fields as appropriate for your data file. For this exercise, use the configuration in the image (right).
14. In the **Send Relationship** left dropdown, select **ContactID** then choose **Subscriber Key** from the right dropdown.
15. Click the **Create** button.

*Data extensions should only be used to when loading a data file that does not contain customers; sensitive or personal information.*

*The ContactID is required and as a data extension field in order to track subscriber behavior in Salesforce CRM.*

*ContactID field configuration:*

- **Data Type:** Text
- **Character Length:** 18
- **Select as Subscriber Key**

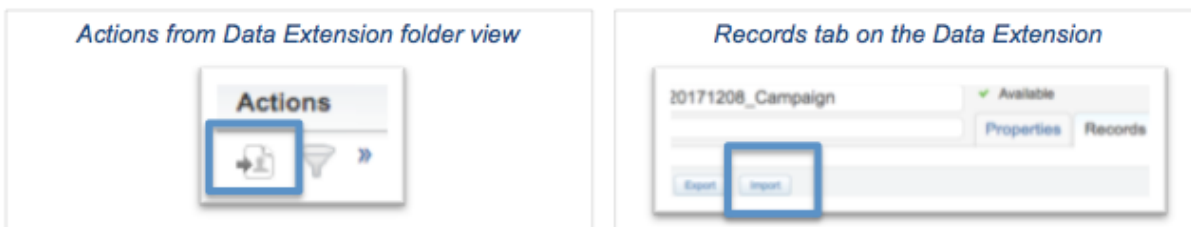


The screenshot shows the 'Create New Data Extension' interface with three tabs: Properties, Data Retention Policy, and Fields. The Fields tab is active, displaying a table with the following configuration:

Name	Data Type	Length	Primary Key	Nullable	Default Value
ContactID	Text	18	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Email	EmailAddress	254	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CampaignCode	Text	50	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	Text	50	<input type="checkbox"/>	<input type="checkbox"/>	

At the bottom, the 'Send Relationship' dropdown is set to 'ContactID' and 'relates to Subscribers on' dropdown is set to 'Subscriber Key'. The 'Create' button is highlighted in blue.

### 2 Places to Access the Import Option:

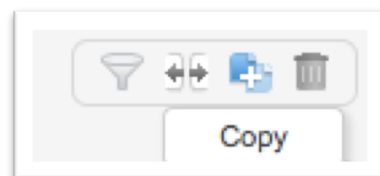


## Import a Data File

1. From the data extension folder, click the **Import** icon under **Actions** at the right of the screen.
2. Choose the **My Computer** radio button under **File Location**.
3. Click the **Browse** button then choose the **Roche Sample Data.csv** file you received.
4. Choose **Comma** as the **Delimiter**.
5. Select the appropriate **Date format** (not relevant to this activity).
6. Choose the appropriate **Import Type**.
7. Check both boxes under **Import Options**.
8. Click the **Next** button.
9. Fields should **Map by Header Row**. If they do not, choose **Map Manually** and use the dropdowns to map the header rows on the file to the data extension.
10. Click **Next**.
11. Review the import details then click **Import**.

## Copy an Existing Data Extension

1. Click on the data extension you wish to copy.
2. Click on the **Copy** icon in the upper-right corner of the screen.
3. Select the appropriate folder as the **Location**.
4. Type an appropriate **Name** and **Description** for the data extension.
5. Click **Copy**.





**Note on Copying Data Extensions:**

*Copying a data extension copies the configuration of the table (field names, data types, etc.), but does not copy any records stored in the data extension.*