Email Testing and Sending

Previewing and Testing Your Email

1. Under the **Content** tab, click on the **Plain Text** button above the preview pane. Adjust text as desired.
2. Click the **Layout** button then click the **Mobile** button to see how content displays in the Preview pane.
3. Once you have finished editing the content of your email, click **Next** in the upper right-hand corner.
4. Above the **Preview** pane to the right, click the **Mobile** button to review how the content displays in mobile view.
5. Above the **Preview** pane to the right, click the **Plain Text** button to review how the plain text version of the email displays. Edit the text as necessary.
6. Click the **Next** button from the upper-right corner above the editor.

Subscriber Preview

1. In the left pane, click on the **Contact** icon to review the **Subscriber Preview and Attributes** panel.
2. Click on the folder then select the **Data Extensions** then click on the **Training** folder.

*When sending to **Salesforce Reports and Campaigns**, either choose **All Subscribers** or select a data extension containing the column names and records of test data that aligns with the sending report.*

3. Click on the **Roche Training Data** data extension in the left pane.
4. Click on a **contact record** in the Subscriber view pane at right or **search for an email address**.
5. Click the **Select** button from the lower-right to preview the email for this subscriber.
6. Click on the **Arrow** button at top of the **Subscriber** pane to scroll to the next subscriber.
7. Review the email for changes based on subscriber data (personalization string, dynamic content, etc.).

Test Send (Send one email to individuals to proof as a recipient)

1. If all appear correct, click on the **Test Tube** icon at from the pane at left.
2. Under the **Individuals** tab, enter your email address.
3. Click on the **Saved Send Classifications** tab to configure the send parameters of your test send as desired.
4. Review your **Subject Prefix** and modify as desired.
5. Keep all boxes checked for **Multipart MIME**, **Track all links in this email**, **Suppress this send from reports**, and **Enable System Generated Links**.
6. Click the **Send Test** button from the bottom of this panel to send a test version of the email as this subscriber would view it.
7. Review the **Test Send Summary** and click **Show Details** to view the email address for this send.
8. Click **Confirm and Send**.

Test Send (Send one email to individuals to proof as a recipient)

1. Under the **Individuals** tab, select **Based on Subscriber Preview "Roche Training Data"**.
2. Click on the **Saved Send Classifications** tab to configure the send parameters of your test send as desired.
3. Review your **Subject Prefix** and modify as desired.
4. Keep all boxes checked for **Multipart MIME**, **Track all links in this email**, **Suppress this send from reports**, and **Enable System Generated Links**.
5. Click the **Send Test** button from the bottom of this panel to send a test version of the email to yourself for each record on the testable data extension.
6. Review the **Test Send Summary** and click **Show Details** to view the email address for this send.
7. Click **Confirm and Send**.

UI Send (Send one email to each record to preview email)

1. Scroll to the top of the **Test Send** pane at left and click on the **Test Data Extensions** tab.
2. Click on the folder icon and select the appropriate test **Data Extension** then click **Select**.
3. Under Content Personalization Options select Based on Recipient "Roche Training Data".
4. Click on the **Saved Send Classifications** tab to configure the send parameters of your test send as desired.
5. Review your **Subject Prefix** and modify as desired.
6. Click the **Send Test** button from the bottom of this panel to send a test version of the email as this subscriber would view it.
7. Review the **Test Send Summary** to view how many messages will be sent
8. Click **Show Details** to view the data extension selected for this send.
9. You will be asked to check the box to verify "I understand this test send exceeds the recommended threshhold for test send messages" before continuing with the test send.
10. Click **Confirm and Send** (not recommended).

Send an Email to a Salesforce Report via Send Flow

1. Return to the **Content Builder home screen** and navigate to **your folder**.
2. Click on the name of your email.
3. Review the **Details** pane at left and review the content under the **Preview** pane at right.
4. From the upper right corner, click the **Send** button.
5. Review your **Subject** and **Preheader**.
6. Click the **Saved Send Classification** tab and select the appropriate Send Classification.
7. Click **Next** in the upper right corner.
8. Under the **Select Audience** window, click **Salesforce Reports**.
9. In the **Search** field type **UK** then locate the **Nov UK Training Email Report ND**.
10. In the **Sendable** column, be sure it says **Yes**. (Report must contain the Person ID fields in order to be marked as Sendable.)
11. Drag and drop the report to the **Targeted** field at right.
12. Drag and drop the **ND Nov UK Report Filtered** to the **Excluded and Suppressed** field at right.
13. Deselect **De-duplicate subscribers** if appropriate.
14. Click **Next.**
15. In the **Send Timing** section, schedule the send as desired.
16. Check the boxes to **Track Clicks**, **Send Tracking Results to Sales Cloud**, **Retain Send Log Data**, and **Multi-part MIME**.
17. Click **Next**.
18. Under **Advanced Options**, select the appropriate **Tracking Destination Folder**.
19. Click **Next** from the upper-right corner.
20. Review the **Audience** information in the left pane of the screen.
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 **Send** in the upper-right corner.

Tracking and Reporting in Marketing Cloud

Email Send Tracking

1. Navigate to **Tracking** in the Email Application to the **My Tracking** folder.
2. Filter sends by clicking in the **Showing** dropdown and select a date range.
3. Click into a send; make note of the **Job ID**.
4. Under **Inbox Activity** click the hyperlinked number for **Unique Clicks**.
5. Click under **Hard Bounces** and look at the bounce reason.
6. Click on the **Click Activity** tab.
7. Review the email that displays in **Email Overlay View**.
8. Click on **Link View**.
9. In the **Showing** dropdown, select **All Links**.
10. Click in on a one of the **Unique** counts to view the subscribers who clicked on that link.
11. In **Email Layover View**, note which links had the most activity.

Updating a Link in an Email after Sending

1. Navigate to **Tracking** in the Email Application to the **My Tracking** folder.
2. Click on the **Name** of the send you wish to update.
3. Click on the **Job Links** tab.
4. Locate the **URL** that needs to be changed.
5. Click on the **URL ID**.
6. Adjust the URL as necessary in the **URL field**.
7. Adjust the URL **parameters** as necessary.
8. **Save** your changes.
9. Repeat for each send affected.

Note on Updating Job Links:

Changes to links pertain to this specific send job only. Update link in email content for future sends.

Marketing Cloud Reports

1. Navigate to the **Reports** tool from the **Marketing Cloud** > **Analytics Builder** menu.
2. Click on the **Catalog** from the menu.
3. Find the **Recent Email Send Summary** report and click **Create**. Configure the report parameters.
4. Click **Submit**.
5. Review the results.
6. Click **Save**.
7. Name the report **[Name] Recent Email Send Summary**
8. Click on the **Snapshot** icon in the top right; select **PDF** and **Save**.
9. Click **Back to Report Catalogue** and click on **Overview** from the menu bar.
10. Click onto the name of your report.
11. Review where you can alter the parameters of this report or run another snapshot.
12. Click on the **PDF** icon and view the report file once it downloads.

Tracking & Reports in Sales & Service Cloud

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. Configure as desired.
5. **Save** the report
6. Click **Run Report** to genreate results on screen.