Marketing Cloud Engagement for Industries

@salesforcedocs

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Contents

Marketing Cloud Engagement for Industries Documentation

Marketing Cloud Engagement for Industries is a suite of outreach marketing tools that help you communicate with and engage your supporters, customers, and contacts. Learn how to take your messaging further with personalised emails, audience segmentation, and automated email campaigns.

Get Started with Marketing Cloud Engagement for Industries

Learn how to install and use Marketing Cloud Engagement for Industries. Send personalised emails to target audiences and create automated email campaigns.

Overview of Marketing Cloud Engagement for Industries

Communicate and engage with your customers by using Marketing Cloud Engagement for Industries.

Marketing Cloud Engagement for Industries is a suite of outreach marketing tools that help you communicate with and engage your supporters, contacts, and customers on any scale. Take your messaging further with personalised emails, audience segmentation, and automated email campaigns.

To help you get you up and running quickly with Marketing Cloud, we created a Get Started page in the Marketing Cloud Engagement for Industries app. The Get Started page walks you through the connection process and provides access to a set of specialised assets, such as emails and journeys.

Prerequisites for Marketing Cloud Engagement for Industries

Get ready to install Marketing Cloud Engagement for Industries by making sure you have the required licences and features.

Before you install Marketing Cloud Engagement for Industries, you will need the required licences. Reach out to your Account Executive or directly access your Salesforce accounts to manage your subscriptions.

Next complete the following prerequisites to connect Marketing Cloud to your Salesforce CRM.

Enable Lightning Experience

Salesforce Lightning is the next generation of the Salesforce user experience, and is a requirement for Marketing Cloud Engagement for Industries. If your organisation isn't already in Lightning Experience, learn more in How to Transition to Lightning Experience.

Enable My Domain

My Domain helps keep your data more secure by adding a customer-specific domain name to your Salesforce org URLs, and is a requirement for Marketing Cloud Engagement for Industries. If you haven't already rolled out My Domain in your org, learn more in Set Up My Domain.

Install the Marketing Cloud Engagement for Industries Package

Install the Marketing Cloud Engagement for Industries Package into your org.

1. Visit the Marketing Cloud Engagement for Industries Installer page.
2. Click **Log In** to Start Pre-Install Validation and select your org type.
3. Enter your login credentials.
4. Click **Allow**.
5. Click **Install**. You'll see a confirmation when the installation is complete.

Launch the Marketing Cloud Engagement for Industries App

Open the Marketing Cloud Engagement for Industries app and follow the instructions on the Get Started page to get ready to connect Marketing Cloud with Salesforce.

1. Log into Salesforce.
2. From the App Launcher, find and select **MC Engagement for Industries**.
3. Follow the instructions on the Get Started page.

You're now ready to connect Marketing Cloud with Salesforce.

Marketing Cloud Engagement for Industries Assets Deployed

Learn about the assets that are available to you after you complete the Get Started flow in Marketing Cloud Engagement for Industries.

You can use assets such as these after successful completion of the Get Started flow.

Assets Deployed	Location in Marketing Cloud
Emails	Content Builder

Assets Deployed	Location in Marketing Cloud
Journeys	Journey Builder
Automations	Automation Studio
Data Extensions	Contact Builder

Need Help?

Connect with resources to help you get Marketing Cloud Engagement for Industries up and running smoothly.

Connecting Marketing Cloud with Salesforce can be a complex process. Join the Trailblazer Community and reach out for help. This online community is where users connect with other Trailblazers to share ideas and ask for help.

If you're still having trouble, contact Salesforce Support.

See Also:

- Trailhead: Marketing Cloud Connect Setup
- Marketing Cloud Troubleshooting Guide

Learn About Email Templates

Find the email templates that meet your needs and learn about using emails in Marketing Cloud.

Find Your Industry's Email Template

Learn how to find the right email template in Marketing Cloud for Industries for your needs.

Versions of email templates are saved based on their time stamp. Before you update an email, make sure you have the right template.

1. Go to the email you want to update.
2. In the Details panel, locate the name of the source template.
3. Go to the email template folder and find the source template.
4. Update as needed.

Resources for Creating and Sending Emails with Marketing Cloud

Explore Marketing Cloud resources about creating, testing, and sending emails.

- Create Synchronised Data Sources in Contact Builder

- Automation Studio
- Create Templates
- Create Emails in Content Builder
- Subscriber Preview and Test Send
- *Trailhead*: Preview, Test, and Send Your Email
- *Trailhead*: Create and Send Targeted Emails

Adopting Marketing Cloud Business Units

Business Units are separate work spaces within an organisation's Marketing Cloud, that allow various teams to manage their data and marketing functions independently. This article explores different aspects of this feature and highlights various considerations to be kept in mind, to make the best use of business units for marketing functions.

Introduction to Marketing Cloud Business Units

Learn how Marketing Cloud Business Units help team members manage their data and marketing functions independently while sharing common assets.

Business Units in Marketing Cloud are separate work spaces within an organisation's Marketing Cloud account, that allow different team members or departments within the same organisation to manage their data and marketing functions independently while enabling sharing of common assets (such as branded templates) with ease.

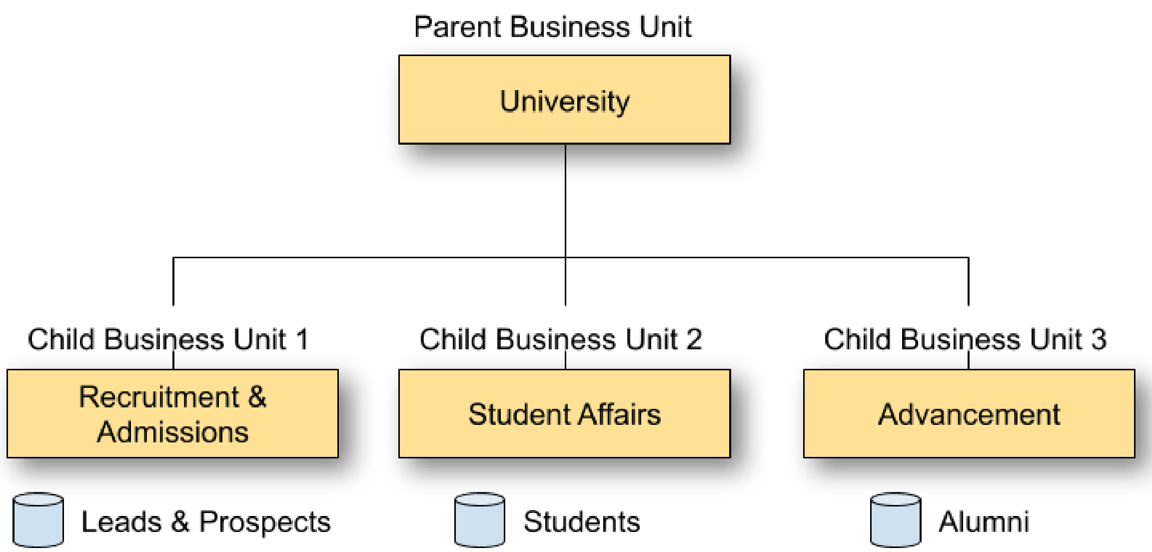
Business Units are created in a hierarchy. The main Business Unit at the top of the hierarchy is called the **Parent Business Unit**, and sub Business Units created under this parent are called **Child Business Units**. These children, in turn, can have their own child nodes and so on.

Parent and Child Marketing Cloud Business Unit Hierarchy in a University

From a business and marketing perspective, Business Units are typically created to manage marketing functions of different subdivisions within an organisation. For example, let's consider a large university which has different marketing teams under Recruitment & Admissions, Student Affairs and Advancement. Each of these subdivisions manage different segments of the audience (leads and prospects, students, Alumni, etc.) and may want to organise and manage their marketing teams and data independently. In this case, the parent IT organisation managing the University might create 3 different business units for each of these divisions under the common Parent called the University Business Unit.

By adopting Business Units, the University can:

- Manage the users of each departments under one umbrella Marketing Account
- Allow all 3 departments to view and manage just the data they need to manage. For example, expose leads and prospective students to Recruitment and Admissions division so that they can take up suitable marketing efforts with that population; similarly, allow Student Affairs division to market to current university students
- Provision users into each of these business units independently. Business unit-specific custom user roles can be created if need be
- Allow users to send different kinds of emails [Recruitment emails vs Student hostel emails] from different business units independently. If one marketer is working for both departments, they can be provisioned into both units.
- Allow users to share common email templates, images and other assets across all business units



Another use case for Marketing Cloud Business units is the need to manage different sub-brands or regional structures under the same brand. This is important not only in the Retail space, but also applicable to certain Higher Education and Nonprofit institutions. For example, a Nonprofit may be an association of multiple organisations which are serving different needs of the society under different brand names in different geographies. In this case, Business Units will help manage the respective marketing teams with better agility and security. Note that there is another added advantage here: adopting business units will allow subscribers to opt out of just that brand or regional entity–instead of the entire organisation.

Features of Business Units

Fine-tune how you segregate and manage data by using Business Units.

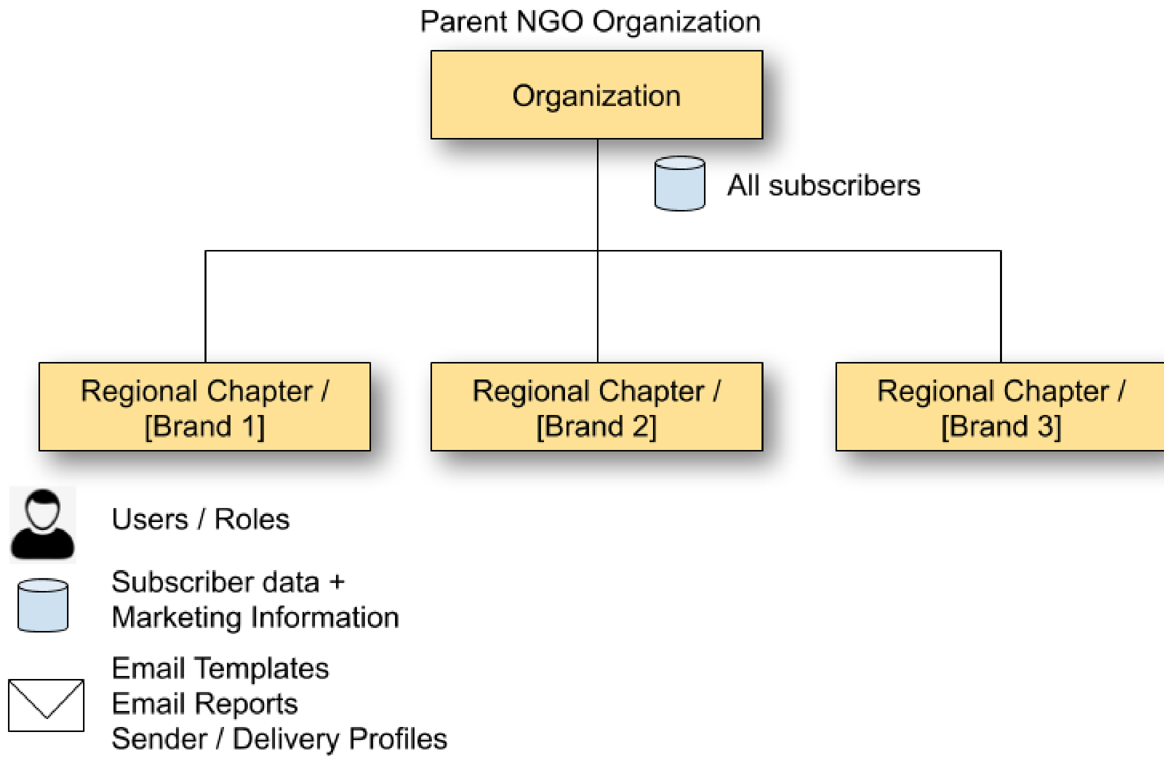
Hierarchy

Consider how your organisation can best use Business Unit hierarchies to structure and organise data management.

While there is no right or wrong way to establish a Business Unit hierarchy, specific user requirements and data needs for subdivisions across the organisation should be assessed to identify the right model. Some of the classic questions to consider are:

- Are there different brands or divisions that need separate work spaces due to specific data needs or processes?
- Are there different branding needs across different marketing teams?
- What are the common assets and data that need to be shared?

These are some of the classic questions to consider. Also, it is good to avoid too many levels or complex hierarchies which are difficult to manage.



Child Business Units maintain their own Subscribers, Users, Roles and Email Templates

Separation and Isolation of User Experience

Learn the types of data and assets that can be managed independently with Business Units.

Within each Business Unit, the user experience can be unique and isolated from the user experiences in the other Business Units.

Business Units allow users to manage the following items independently:

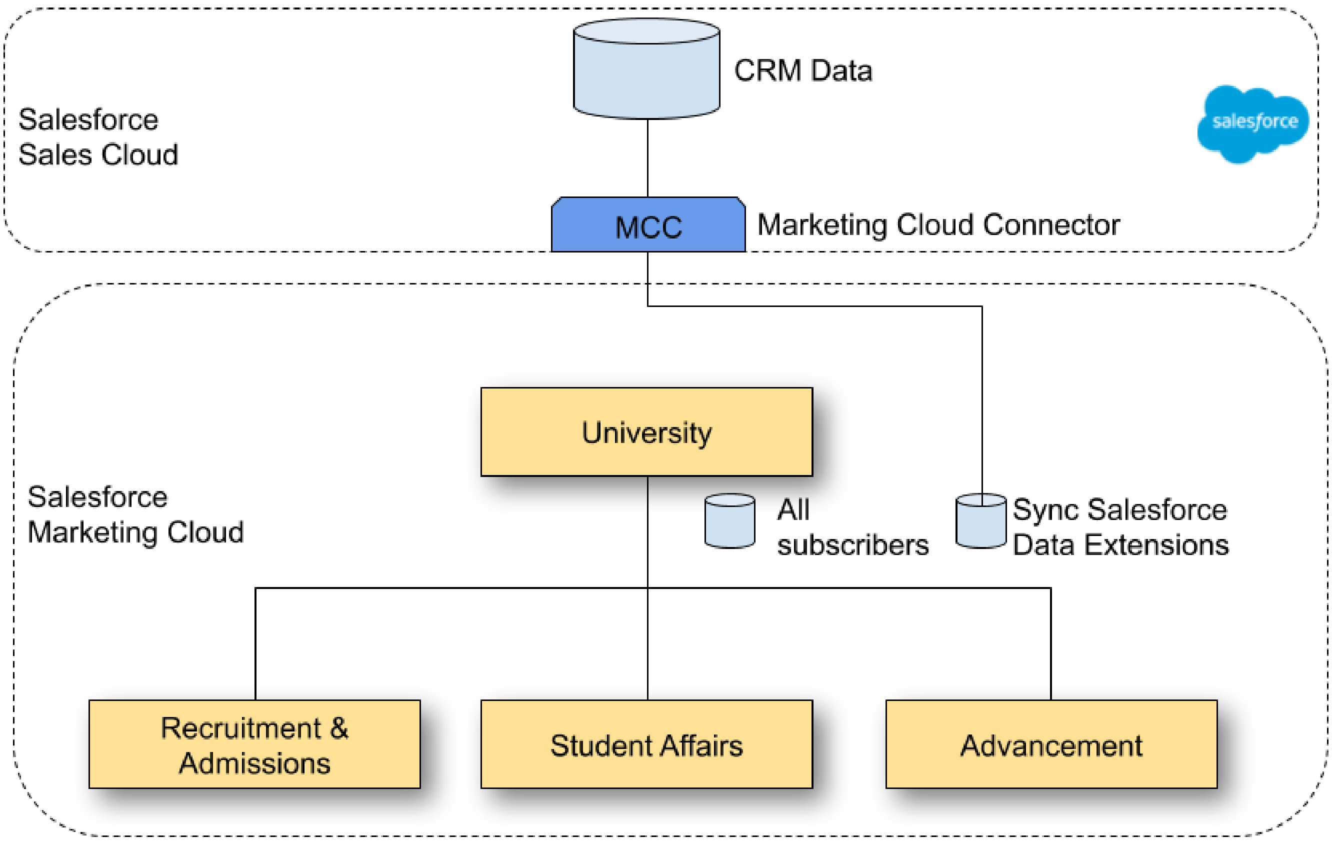
- Subscriber data and associated marketing information**
- Email templates, images, etc.
- User roles (Custom roles can be Business unit specific)
- Sender profiles and Delivery profiles
- Email reports
- Folder structure

**** Note:** The All subscribers table at the parent level maintains a master list of all subscribers across Business units.

Marketing Cloud Connector and Data Sharing

Use Marketing Cloud Connector from Salesforce to synchronise Salesforce core platform data with data in Marketing Cloud.

Customers often use Marketing Cloud Connector from Salesforce to synchronise data between the Salesforce Platform (Sales Cloud, Service Cloud, etc.) and Marketing Cloud. This helps them to manage all CRM data in Sales Cloud while executing Marketing Campaigns from Marketing Cloud.



Marketing Cloud Connector links Salesforce Core Platform and Marketing Cloud

When installing and configuring the Marketing Cloud Connector, the Parent Business Unit should/must be the **point of integration** between Marketing Cloud and Salesforce [1]. By default, the Marketing Cloud Connector brings in all Salesforce CRM Data to the Parent Business Unit and stores it in **Synchronised Salesforce Data Extensions**. Note that the Marketing Cloud Admin has the option to choose those fields they want to synchronise for a given Object in CRM, but they have only limited filtering options[2]. Once this data is in the Parent, the Parent can then **query** and **share specific sets of data** to each Child Business Unit. This sharing would happen via a **Shared Data Extension folder**. It can be configured so that a given Shared Data Extension folder is only accessible to a particular Child Business Unit so that no other Business unit would have access to this folder and, therefore, the data. This ensures that the data in each Child Business Unit is secure and specific to their specific needs only.

Because the Parent Business Unit has access to all of the data before it is filtered to each Child Business Unit, the Parent Business Unit can be utilised for communications that need to be sent on behalf of the entire organisation.

To illustrate this for Higher Ed, the Parent Business Unit–the University–would consume all relevant student data from Salesforce. The Parent University Business Unit could filter and share data for each of the various colleges to be used to send marketing communications to their relevant students. The University Business Unit, however, may be used to send University-wide communications to all students.

Footnotes:

[1] The only exception is for multi-org connected Marketing Clouds, i.e. a Marketing Cloud instance linked to multiple instance of Sales/Service Cloud - more information on that can be found here.

[2] Filter based on a set Boolean field / Filter data from a set date onwards.

Considerations for Marketing Cloud Business Units

Learn about decisions to consider when configuring Marketing Cloud Business Units.

Dedicated IP / Wrapping Domain

Learn when to use a dedicated IP address or single wrapping domain for a Business Unit.

Depending on send volume or use case, one IP address can be **shared across all Business Units** of an Organisation. With proper monitoring and maintenance, sharing a dedicated IP gives the organisation the ability to maintain a positive Sender Reputation while also unifying the branding.

There may be some use cases where a Business Unit may wish to have their own dedicated IP. Typically this occurs if send volumes are upwards of 2.5 million per month. The additional dedicated IP can be utilised, then, when sending different types of email communications, such as Transactional vs. Commercial messaging.

When the customer has opted for Sender Authentication Package or SAP as a part of their initial setup, the entire Organisation can **share one dedicated wrapping domain** across all Business Units. This domain is used to wrap all URLs and images so that they are reflecting the organisation brand rather than the default Marketing Cloud brand. For example, ABC University, a higher education institution, can designate the domain

communications.abcuniv.edu as its wrapping domain and all image URLs and links can be wrapped using that URL.

Typically, a single wrapping domain is used across all business units of an organisation. However, it is also possible to configure individual wrapping domains for specific business units if necessary. This is especially required for organisations intending to use Business units to manage multiple brands.

Opt Out / Preference Centre

Manage email opt-outs across your entire organisation, or fine-tune opt-out options in each Business Unit.

Opt-outs from emails can be managed **either at the Business Unit level or across the entire organisation**. If managed at the Business Unit level, when a subscriber unsubscribes from all emails, that preference is specific to emails sent from that Business Unit. If managed at the organisation level or Enterprise level, when a subscriber unsubscribes from emails, this preference is applicable across **all emails from all Business Units**.

Each Business Unit can have its own dedicated Preference Centre that can house different communication preferences within it. For example, preferences for different types of email content the subscriber would like to receive can be recorded and modified by the subscriber as per their choice. It is also possible for the organisation to choose to manage preferences across all Business Units in one place, using Cloud Pages or other custom preference centres. See the note on Cloud Pages later in this article.

Suppression Lists and **Exclusion Lists** exist at a Business Unit level, which allows each unit to control who should and who should not be receiving email communications. It is also worth noting that email validity (e.g. Hard and Soft bounces) are tracked at the Parent Business unit level and applied down to all Child Business Units.

Data Sharing / Security

Share content and assets from the Parent Business Unit to Child Business Units, or between Child Business Units.

Both **data and content can be shared** across Business Units within an instance. As mentioned above, data from the Parent Business Unit can be shared to the Child Business Units as required. But data **can also be shared across Child Business Units** if the need arises.

The same is true for content as well as assets. Content from one Business Unit can be shared to another Business Unit. This may be the Parent Business Unit creating and managing email templates or logos for each of the Child Business Units or sharing images across two or more Child Business Units.

It is important to note that in terms of sharing, once a user gets access to certain data in a business unit, you cannot limit their visibility. For example, if a user is granted access to subscriber data within the Business Unit, they will have access to all subscriber data within the unit. The same with content; if the user gets access to content, they have access to all of the content. Folders within the Business Unit help to organise and divide data or content, but cannot restrict access for users within the Business Unit.

Cloud Pages

Use Cloud Pages and Content Builder to create landing pages and keep content consistent and easy to manage across channels.

Cloud Pages within Marketing Cloud allow users to build and publish landing pages or microsites. By using content saved within Content Builder, all content across channels stays consistent and easy to manage. As mentioned above Cloud Pages can be used to create, among other things, Custom Preference Centres. In turn, Preference Centres can represent/display data from within Marketing Cloud at the Child or Parent Business Unit level and even pull and update data from a connected Salesforce instance - using AmpScript.

While the content and assets that are used to build the page can be shared, Cloud Pages as built are limited to the Business Unit that they are created in and cannot be shared across different business units.

Brand Representation

Learn about some considerations for brand representation and content sharing across Business Units.

In the Introduction, we briefly discussed the context of managing multiple brands using Business Units. Various divisions, departments, or brands under one organisation can divide and manage their marketing functions independently using Business Units. Please note that making use of business units is just an important first step in multi-brand marketing management. Subscribers may not realise or connect with these brands, unless the email templates, images and associated content reflect the individual brand identity appropriately.

For example, consider a University which runs three (3) different schools for Engineering, Business and Commerce. It is possible that these schools are marketing and communicating using their own specific branding and messages. The audience (or learners) for each of these brands are quite different; hence the marketing communication, personalisation, and frequency should be tailored to suit the needs of these brand audiences / segments. It is also possible that a university wants to start a new online school for adult learners under a slightly different brand name with a totally new set of educational experiences. Under such situations, the concept of Business Units can be effectively used to manage multiple communication experiences under one Marketing Cloud account.

The Parent Business Unit typically represents the parent company or university in this situation and each unique brand under that entity can be housed in their own Business Units and marketed independently.

Considerations:

- If there is a need to manage or control common branding assets, such as email templates or images, that can be done using Content Builder sharing
- If there is a need to share Subscriber data or other information across different Business Units, the shared folders in data extension can be leveraged
- Each Business Unit can host its own custom subscription centre using the desired branding and templates - so that its subscribers can manage their profiles and subscriptions appropriately
- Whilst some groups within an institution may see themselves as an entirely different brand that is not always true for the end audience. Consider the experience of your end constituents as well as internal audiences when setting up new Business units.

User Base and Roles

Learn about considerations and best practices for granting access to users and using standard and custom roles in Business Units.

When a user is provisioned in Marketing Cloud, they can receive access to one or more Business Units. However, providing differential access to different sets of users might become very cumbersome and complex to manage.

Considerations:

- Limit the number of users at the Parent Business Unit to Marketing Cloud Administrators, any team members that need to see Parent Unit level data (such as Central Marketing), and any teams that create content that are shared across all Business Units (such as Brand management)
- Individual marketers or technical people who work for specific divisions should have restricted access to respective Business Units only. Within that Business Unit, they might be given desired access to various tools and data
- If an individual, say a marketer, handles more than one division, they can be given access to more than one Business Unit. However, these should be treated as exceptions and should not become a norm.
- As far as possible, the roles within each of these Business Units need to be standardised. This is especially challenging when the different Business Units represent different entities which have very different organisational structures. Marketing Cloud does allow creating custom roles at every Business Unit level, but this can easily balloon into an Administrative

burden if not managed properly. Best practice is to standardise roles across all Business Units supported by a parent entity

- Note that creating custom roles is a manual process and there is no way to export custom roles from one Business Unit to another. This can be challenging if a Parent has a number of Children and every Child needs custom roles.

Additional Information

Use these additional resources to learn more about Business Units in Marketing Cloud and Salesforce Distributed Marketing.

- Business Units in Marketing Cloud
- Salesforce Distributed Marketing

Note

Thank you to Rebecca Schults Robrahn for also contributing to this article. Rebecca is a Marketing Cloud Consultant with Accenture based in the U.S. Rebecca works with higher ed customers across the country to strategise, implement, and support their Marketing Cloud instance and integrations with other Salesforce technologies.

Marketing Cloud Engagement for Industries and Translation

Learn what languages we support for Marketing Cloud Engagement for Industries.

Frequently Asked Questions

Get answers to questions about localisation, including frequency, languages, and documentation.

How often do you localise Salesforce.org products?

We localise our product labels and text as part of every major seasonal release.

What languages do you localise into?

Salesforce.org localises by package, not by product, so the languages vary. See Available Languages. Salesforce offers three levels of language support: fully supported languages, end-user languages, and platform-only languages. For more information, see Supported Languages.

Do you localise product documentation?

We currently localize documentation for these products: Accounting Subledger, Accounting Subledger Legacy, Case Management, Education Cloud, Education Data Architecture (EDA), Grants Management, Insights Platform Data Integrity, Marketing Cloud Engagement for Industries, Nonprofit Cloud, Nonprofit Success Pack (NPSP), Outbound Funds Module, Program Management Module (PMM), and Student Success Hub (SSH). See Available Languages for details. See Localised Documentation for a list of links to documentation.

I noticed a mistake or something missing from a translation. Where do I report it?

Keep in mind that we update translations only for major releases, so they can be out of sync after minor releases. To report a mistake, create a case with the Topic set to `Setup and Security`, and the Category set to `Globalisation and Localisation`.

Can I override translations?

Absolutely. You can use the Translation Workbench to override translations. To learn more, see Translation Workbench.

What's the difference between language and locale?

In Salesforce, you'll see both Language and Locale settings. Locale determines the display formats for date and time, addresses, phone numbers, and commas and periods in numbers. Language determines the language that objects, fields, settings, and user interface text appear in.

Do you accept translations from the community?

Even though many of our products are open source, we don't currently accept GitHub pull requests for localisation contributions. The localisation process requires a level of maintenance that's not realistic or sustainable for community contributors, and we therefore rely on our own localisation programs to deliver high-quality, timely translations.

Available Languages

See the list of languages availble for Marketing Cloud Engagement for Industries.

Salesforce.org provides translations into these languages. When you choose one of the supported languages during user (or org-wide) setup, Marketing Cloud Engagement for Industries objects, fields, settings, and user interface text appear in that language.

Marketing Cloud Engagement for Industries

Language	UI	Documentation
Dutch	√	√
English (UK)	√	√
French	√	√

Language	UI	Documentation
German	√	√
Japanese	√	
Portuguese (Brazil)	√	√
Spanish	√	

Localised Documentation

Get links to documentation in other languages.

Use these links to access the localised documentation for each available language.

Marketing Cloud Engagement for Industries

- Dutch
- English (UK)
- French
- German
- Portuguese (Brazil)
- Spanish (Spain)

Marketing Cloud for Nonprofits Legacy

- Dutch
- English (UK)
- French
- German
- Portuguese (Brazil)

Enable Languages

Enable localisation in Salesforce for your Marketing Cloud Engagement for Industries product.

We recommend that you complete these steps to enable a language for use in Marketing Cloud Engagement for Industries:

1. Before using any translated languages, enable Translation Workbench in Setup. For information, see Enable and Disable the Translation Workbench.

2. If you're enabling a platform-only language:
    a. From Setup, search for and then select **Enable platform-only languages**.
    b. Move the desired language to the Displayed Languages list.
    c. Save your changes.

Troubleshoot Marketing Cloud Engagement for Industries

Resolve errors and configuration issues in Marketing Cloud Engagement for Industries.

Fix Get Started Page Errors

Resolve errors that occur on the Marketing Cloud Engagement for Industries Get Started page.

If you encounter errors when working through the Marketing Cloud Engagement for Industries Get Started page, ensure that you:

- Have the necessary system permissions.
- Performed the necessary steps in the process.

The Marketing Cloud Engagement for Industries Get Started page is modeled on the Marketing Cloud Connect Setup module in Trailhead. To resolve issues you experience in the Get Started page, follow the instructions in the Trailhead module.

Synchronise Data Extensions

Create a synchronised data extension during the Get Started workflow to allow data to flow from CRM to Marketing Cloud.

If you deploy assets without setting up the synchronised data extensions, assets are deployed but the SQL query automations are not. An error message appears about 10 minutes after deployment indicating data failure.

Synchronise Your Salesforce Data with Marketing Cloud prior to deploying assets.

Update Email Asset Colours

Change the theme colour for an email asset after it's deployed.

You can customise assets with your organisation’s branding before you deploy them on the Get Started page. To change the theme colour for an email asset after it's deployed:

1. Log in to Marketing Cloud.

2. Go to **Email Studio** > **Email**.
3. Click **Content**.
4. Select an asset to edit. Be sure to select an asset where the type is Template, not Template-Based Email.
5. Click **Edit**, and then **Edit Content**.
6. Click **Code View**.
7. Find the AMPscript line that sets the theme colour.

   For example: `SET @companyColour = TreatAsContent('#000000')`

   Here, the colour code is #000000.
8. Enter a new colour code.
9. Save your changes.

> **Note**
> The theme colour update isn't visible when you view the asset. You will see the updated colour when you preview and send the email.

To update existing emails that use a template where you updated the theme colour:

1. Go to **Email Studio** > **Email**.
2. Select an email to edit.
3. Click **Edit**, and then **Edit Properties**.
4. Find the Template Changed warning message and click **Update Email Now**.
5. Click **Next** and save your changes.

Still Need Help?

Connect with community resources for additional help with Marketing Cloud Engagement for Industries.

Join the Trailblazer Community and reach out for help. This online community is where users connect with other Trailblazers to share ideas and ask for help.

If you're still having trouble, contact Salesforce Support.

See Also:

- Trailhead: Marketing Cloud Connect Setup
- Marketing Cloud Troubleshooting Guide

Marketing Cloud Engagement with Your Products

Finish setting up Marketing Cloud Engagement for Industries to work with your products.

Synchronise your CRM data with Marketing Cloud to use Marketing Cloud Engagement for Industries to its fullest potential.

Here's a high level summary of the data synchronisation steps:

1. Create a synchronised data source to automatically add contact data from Salesforce to Marketing Cloud on a recurring basis.
2. Using Automation Studio, run a data query to populate your data extensions on a recurring basis.

> **Note**
> Work with your Marketing Cloud admin to set up Marketing Cloud Engagement for Industries for your product.

Marketing Cloud Engagement for Education

Use Marketing Cloud Engagement for Industries to its fullest potential and synchronise your Education Cloud CRM data with Marketing Cloud.

We recommend that you complete these integration steps with your Marketing Cloud admin.

Create a Synchronised Data Source for Education Cloud

Create a synchronised data source to automatically add new and updated Education Cloud data to Marketing Cloud on a recurring basis. Synchronising your data ensures that you always have the most up-to-date information available for your marketing efforts.

Create synchronised data sources for these objects: Account, Contact, Individual Application, Lead, Service Appointment, and User. Salesforce uses the fields on these objects in preconfigured email templates.

> **Note**
> You can't change relationships between synchronised objects after the initial synchronisation.

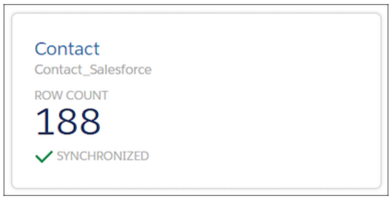
1. Log into Marketing Cloud.
2. Under Audience Builder, click **Contact Builder**.

3. Click **Data Sources**.
4. Click **Synchronised**.
5. Click the available data source tile.
6. Click **Set Up Object**.
7. Click **Synchronise** on the Account tile.
8. Select these fields:
    - FirstName
    - PersonEmail
    - Phone
    - LastName

    > **Note**
    > Required fields such as Id or RecordTypeId are selected by default.

9. Click **Next**.
10. Select how to filter the synchronised data while considering your Marketing Cloud utilisation limits. For information about those limits or increasing them, contact your account executive. See How do I find my Salesforce.org Account Executive?.
11. Select how often to synchronise data. We recommend every 15 minutes.
12. Save your changes.
13. If prompted, click **OK** to confirm the synchronisation process.
14. Repeat steps 6–13 for these objects and fields:
    - Contact: FirstName, LastName, Phone
    - Individual Application: ApplicationCategory, ApplicationType, AppliedDate, Category, Status
    - Lead: FirstName, LastName, LeadSource, Name, Phone
    - Service Appointment: AppointmentType, ApptBookingInfoUrl, Description, Duration, SchedEndTime, SchedStartTime, Status, StatusCategory, Subject
    - User: CompanyName, Department, FirstName, LastName, Phone, SenderEmail, SenderName

The synchronisation sometimes takes several minutes depending on the number of records. After it completes, a tile shows a row count and a Synchronised status for each of the selected objects. Here's an example for the Contact object.



Note

The data synchronisation is one way from Salesforce to Marketing Cloud. So Marketing Cloud doesn't send any subsequent data changes to Education Cloud.

Populate Education Cloud Data Extensions With Automation Studio

Create automations to refresh your data extensions when your data source receives new data from Salesforce.

1. Log into Marketing Cloud.
2. Under Journey Builder, click **Automation Studio**, and then select **New Automation**.
3. Drag **Schedule** to the Start with a Starting Source dotted circle, and then click **Configure**.
4. Enter a start date and time for the automation, and then select your time zone.
5. If needed, select a frequency, and then configure the cadence. Schedule this process to run daily or weekly, depending on how often you send emails, so that you have the most recent data.
6. Click **Done**.
7. Drag **SQL Query** onto the canvas, click **Choose**, and then select **EducationCloudAccount**.
8. Enter this query: `select PersonEmail as PersonEmail, Phone as Phone, FirstName as FirstName, LastName as LastName from Account_Salesforce`.
9. Click **Done**.
10. Repeat steps 7–9 to add these activities:
    - **EducationCloudContact**: `select Email as Email, Phone as Phone, FirstName as FirstName, LastName as LastName from Contact_Salesforce`
    - **EducationCloudIndividualApplication**: `select Id as Id, AccountId as AccountId, ContactId as ContactId, ApplicationCategory as ApplicationCategory, ApplicationType as ApplicationType, Category`

as Category, Status as Status, AppliedDate as AppliedDate from IndividualApplication_Salesforce

- **EducationCloudLead**: `select Email as Email, Phone as Phone, FirstName as FirstName, LastName as LastName from Lead_Salesforce`
- **EducationCloudServiceAppointment**: `select Id as Id, AccountId as AccountId, ContactId as ContactId, ApptBookingInfoUrl as ApptBookingInfoUrl, AppointmentType as AppointmentType, Subject as Subject, Description as Description, SchedStartTime as SchedStartTime from ServiceAppointment_Salesforce`
- **EducationCloudUser**: `select Email as Email, SenderEmail as SenderEmail, Phone as Phone, SenderName as SenderName, FirstName as FirstName, LastName as LastName, Department as Department, CompanyName as CompanyName from User_Salesforce`

11. Save your changes.
12. To test the automation, click **Run Once**.

Set Up Emails with Marketing Cloud Engagement for Education

Marketing Cloud Engagement for Education provides email templates to help you efficiently set up your institution's email campaigns.

Marketing Cloud Engagement for Education provides these email templates.

- Recruitment & Admissions - Application Deadline: Send automated emails to remind learners of upcoming application deadlines.
- Student Success - Appointment Confirmation: Send automated emails to confirm appointment details to learners after they schedule a meeting with your staff.
- Alumni Engagement - Recent Graduate Portal Invitation: Send an email to invite recent graduates to join the alumni portal and to inform them of available resources, such as career services and groups.
- Alumni Engagement - Institution Outreach Campaign: Send an email to alumni with information about your institution's mission, goals, and progress updates for capital campaign initiatives.

Create Emails Using Education Cloud Email Templates

Use preconfigured email templates or customise them to fit your needs.

1. Log into Marketing Cloud.
2. Under Content Builder, click **Content Builder**.
3. Click **Create**, and then select **Email Message**.

4. Select the **Template** creation option, and then click **Saved**.
5. Select the template to use, and then click **Select**.
6. Enter the email properties, and then click **Next**.
7. Enter a subject and, if needed, a preheader to display text after the subject line in an email client. A preheader isn't required, but effective preheader text can increase the number of recipients who open your email.
8. If needed, edit the default text and personalise the email, and then click **Next**.
9. If needed, preview the email and perform a test send.
10. Save your changes.

Send Education Cloud Emails

After your emails are ready, choose when and who to send them to.

1. Log into Marketing Cloud.
2. Under Email Studio, click **Email**.
3. Select the email that you created, and then click **Send**.
4. If needed, enter email properties, and then click **Next**.
5. Click **Data Extensions**, and then drag the object representing your subscribers to the Targeted section.
6. In the Select Publication List window, if needed, select specific subscribers instead of all of them, and then click **Select**.
7. Click **Next**, configure the timing for sending the email, and then click **Next**.
8. Verify all the details of your email delivery. To make changes, click **Back**. When you're happy with the setup, select **This information is correct and this email is ready to send.** and then click **Schedule**.

Related Links

- Learn About Email Templates

Marketing Cloud Engagement for Financial Services Cloud

Use Marketing Cloud Engagement for Industries to its fullest potential and synchronise your Financial Services Cloud CRM data with Marketing Cloud.

Create Synchronised Data Sources for Financial Services Cloud

Create a synchronised data source to automatically add new and updated customer information to Marketing Cloud on a recurring basis. Synchronising your data ensures that you always have the most up-to-date information available for your marketing efforts.

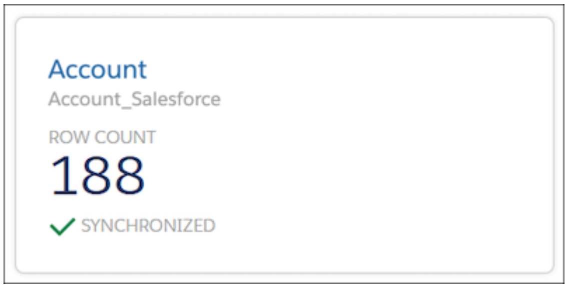
Create a synchronised data source for the Account object. The fields on this object are used in preconfigured email templates.

> **Note**
> You can't change relationships between synchronised objects after the initial synchronisation.

1. Log into Marketing Cloud.
2. Under Audience Builder, click **Contact Builder**.
3. Click **Data Sources**.
4. Click **Synchronised**.
5. Click the available data source tile.
6. Click **Set Up Object**.
7. Click **Synchronise** on the Account tile.
8. Select these fields:
   - Name
   - PersonEmail

   > **Note**
   > Required fields such as Id are selected by default.
9. Click **Next**.
10. Select how to filter the synchronised data while considering your Marketing Cloud utilisation limits. For information about those limits or increasing them, contact your account executive. See How do I find my Salesforce.org Account Executive?
11. Select how often to synchronise data. We recommend every 15 minutes.
12. Save your changes.
13. If prompted, click **OK** to confirm the synchronisation process.

The synchronisation sometimes takes several minutes depending on the number of records. After it completes, a tile shows a row count and a Synchronised status for each of the selected objects. Here's an example for the Account object.



Note
customThe data synchronisation is one way from Salesforce to Marketing Cloud. So Marketing Cloud doesn't send any subsequent data changes to Financial Services Cloud.

Set Up Emails with Marketing Cloud Engagement for Financial Services Cloud

Marketing Cloud Engagement for Financial Services Cloud provides email templates to help you efficiently set up your institution's email campaigns.

Marketing Cloud Engagement for Financial Services Cloud provides these email templates:

- Financial Support Services Email: Email introducing the financial support services available at your company.
- Bank Account Sync Expiration Email: Email notification that the Open Banking sync connecting a client's bank account to your bank has expired. Email includes next steps for the client to renew.
- Recurring Payment Confirmation Email: Email notification to confirm that a recurring payment schedule is setup on the client's account.
- Register for Mobile or Digital Banking: Email confirmation after a client registers for mobile or digital banking.
- Investment Advice Services Email: Email introducing investment advice services available at your company.
- New Client Emails: Email introducing the client to financial services available at your bank.

Create Emails Using Financial Services Cloud Email Templates

Use preconfigured email templates or customise them to fit your needs.

1. Log into Marketing Cloud.
2. Under Content Builder, click **Content Builder**.
3. Click **Create**, and then select **Email Message**.
4. Select the **Template** creation option, and then click **Saved**.
5. Select the template to use, and then click **Select**.
6. Enter the email properties, and then click **Next**.
7. Enter a subject and, if needed, a preheader to display text after the subject line in an email client. A preheader isn't required, but effective preheader text can increase the number of recipients who open your email.
8. Edit the default text and personalise the email, and then click **Next**.
9. Preview the email and perform a test send.
10. Save your changes.

Send Financial Services Cloud Emails

After your emails are ready, choose who to send them to and when.

1. Log into Marketing Cloud.
2. Under Email Studio, click **Email**.
3. Select the email that you created, and then click **Send**.
4. If needed, enter email properties, and then click **Next**.
5. Click **Data Extensions**, and then drag the object representing your subscribers to the Targeted section.
6. In the Select Publication List window, if needed, select specific subscribers instead of all subscribers, and then click **Select**.
7. Click **Next**, configure the timing for sending the email, and then click **Next**.
8. Verify all the details of your email delivery. To make changes, click **Back**.
9. When you're happy with the details, select **This information is correct and this email is ready to send.** and then click **Schedule**.

Related Links

- Learn About Email Templates

Marketing Cloud Engagement for Health Cloud

Use Marketing Cloud Engagement for Industries to its full potential and synchronise your Health Cloud CRM data with Marketing Cloud.

We recommend that you complete these integration steps with your Marketing Cloud admin.

Create a Synchronised Data Source for Health Cloud

Create a synchronised data source to automatically add new and updated Health Cloud data to Marketing Cloud on a recurring basis. Synchronising your data ensures that you always have the most up-to-date information available for your marketing efforts.

Create a synchronised data source for the Account object. The fields on this object are used in preconfigured journeys. Create synchronised data sources for additional objects based on the data extension entry sources you use in journeys.

> **Note**
> You can't change relationships between synchronised objects after the initial synchronisation.

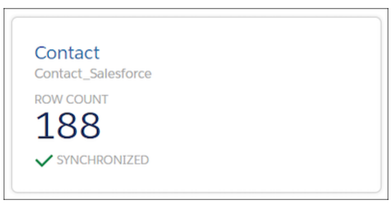
1. Log into Marketing Cloud.
2. Under Audience Builder, click **Contact Builder**.
3. Click **Data Sources**.
4. Click **Synchronised**.
5. Click the available data source tile.
6. Click **Set Up Object**.
7. Click **Synchronise** on the Account tile.
8. Select these fields:
    - FirstName
    - PersonEmail
    - Phone
    - LastName

    > **Note**
    > Required fields such as Id or RecordTypeId are selected by default.

9. Click **Next**.

10. Select how to filter the synchronised data while considering your Marketing Cloud utilisation limits. For information about those limits or increasing them, contact your account executive. See How do I find my Salesforce.org Account Executive?.
11. Select how often to synchronise data. We recommend every 15 minutes.
12. Save your changes.
13. If prompted, click **OK** to confirm the synchronisation process.
14. Repeat steps 6–13 for other objects and fields used in journeys for healthcare, for example:
    - Contact: FirstName, LastName, Phone
    - Service Appointment: AppointmentType, ApptBookingInfoUrl, Description, Duration, SchedEndTime, SchedStartTime, Status, StatusCategory, Subject
    - User: CompanyName, Department, FirstName, LastName, Phone, SenderEmail, SenderName

The synchronisation sometimes takes several minutes depending on the number of records. After it completes, a tile shows a row count and a Synchronised status for each of the selected objects. Here's an example for the Account object.



Note
The data synchronisation is one way from Salesforce to Marketing Cloud. So Marketing Cloud doesn't send any subsequent data changes to Health Cloud.

Set Up Journeys with Marketing Cloud Engagement for Health Cloud

Marketing Cloud Engagement for Health Cloud provides customisable journeys specifically for healthcare to help you efficiently design and automate patient outreach.

Use these customisable, multi-step journeys to send personalised emails, documents, and task assignments to patients and care teams:

- Appointment Rating and Follow-Up: Ask a patient to rate an appointment and follow-up if the rating falls below a threshold.
- Appointment Reminder with Instructions: Remind a patient of an upcoming appointment and provide instructions.

- Gap in Care - Mammogram: Remind a patient to schedule a routine screening.
- High-Risk Postoperative Care: Provide at-home care instructions, ask for a patient's status, and follow up if needed.
- Hip Replacement Postoperative Care: Provide at-home care instructions and schedule follow-up appointments.
- Member Onboarding: Send orientation packets to new plan members.

1. Log into Marketing Cloud.
2. Under Journey Builder, click **Journey Builder**.
3. Click **All Journeys**.
4. Find and select a preconfigured journey for Health Cloud.
5. Configure the journey settings, entry source, and each canvas activity as needed.
6. Create marketing content such as templates and emails to support the journey.
7. After you validate and test your journey, activate it.

SEE ALSO

- Journeys and Messages

Marketing Cloud Engagement for Nonprofits - NPSP

Use Marketing Cloud Engagement for Industries to its fullest potential and synchronise your Nonprofit Success Pack data with Marketing Cloud.

Create an NPSP Synchronised Data Source

Create synchronised data sources to bring key stakeholder information from Salesforce to Marketing Cloud.

A synchronised data source automatically adds stakeholder information that you define to Marketing Cloud. Create a synchronised data source that adds new and updated contact data from Salesforce to Marketing Cloud so you'll always have the most up-to-date information available for your marketing efforts.

To create a synchronised data source for contacts:

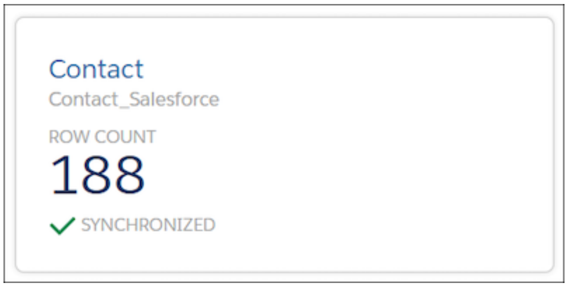
1. Log into Marketing Cloud.
2. Under Audience Builder, click **Contact Builder**.
3. Click **Data Sources**.
4. Click **Synchronised**.
5. Click the available data source tile.

6. Click **+ Set Up New Object**.
7. Locate the Contact tile and click the **Synchronise** button for that tile.
8. Select the fields to synchronise. Salesforce for Nonprofits users select the following fields:
    a. First Name
    b. Last Name
    c. Postal Street
    d. Postal City
    e. Postal State/Province
    f. Zip/Postal Code
    g. npo02__FirstCloseDate__c
    h. npo02__LargestAmount__c
    i. npo02__LastOppAmount__c
    j. npo02__LastCloseDate__c

    > **Note**
    > Some required fields are already selected for you such as Id, Email, and HasOptedOutOfEmail.

    k. npo02__NumberOfClosedOpps__c
    l. npo02__TotalOppAmount__c
9. Click **Next**.
10. In Records Collection, choose how to filter the synchronised data. Consider Marketing Cloud utilisation limits and filter your data accordingly. Work with your Account Executive if you have questions or need to increase your utilisation. Learn more in How do I find my Salesforce.org Account Executive?
11. In Poll Schedule, choose how often you wish to synchronise data. We recommend **15 minutes**.
12. Click **Save & Synchronise**.
13. Salesforce for Nonprofits users should repeat steps 6-12 for the Recurring Donation object. Synchronise the Next Donation Date field npe03__Next_Payment_Date__c.

The synchronisation process may take several minutes to complete depending on the number of records. The synchronisation process is successful when you see a tile for each of the entities you synchronised, including a row count and a synchronised status. Here's an example of the tile for the synchronised Contact entity.



Note
The data synchronisation is one-way from Salesforce to Marketing Cloud. In other words, any changes you make to your contact data in Marketing Cloud doesn't get sent back to Salesforce.

Populate NPSP Data Extensions with Automation Studio

Use Automation Studio to automatically refresh your Data Extension when your Data Source receives new data from Salesforce

Use Automation Studio to automatically refresh your Data Extension when your Data Source receives new data from Salesforce. We created some automations for you, but you need to run them to retrieve the data. The Salesforce for Nonprofits automations for are:

- Recurring Donor Automation
- General Thank You Automation
- Urgent Appeal Automation
- General Donor Newsletter Automation
- Soon To Lapse Automation
- Welcome Series Automation

1. Log into Marketing Cloud.
2. Under Journey Builder, click **Automation Studio**.
3. Go to **My Automations**.
4. Open an automation and click **Run**.
5. In the next window, click **Run Now**.
6. Repeat until you have run all the automations.

> **Tip**
> Schedule this process to run daily or weekly, depending on how often you send emails, so you have the most recent data.

Create an Elevate Email with a Donate Now Button

Add a Donate Now button to emails to take donors to your Giving page.

Salesforce for Nonprofits users can combine the powers of Marketing Cloud Engagement for Industries and Elevate to boost your donations. Create emails that include a Donate Now button that takes donors to your Giving Page.

> **Note**
> This option is only available to Salesforce for Nonprofits users with an Elevate licence.

1. Open the Elevate email template.
2. In the body of the email, find the Donate Now button.
3. Modify the following URL sections:
    a. Replace **your-subdomain** with the correct subdomain name.
    b. Replace **giving-page-name?** with the name of your Giving page.
4. Save your work.

Marketing Cloud Engagement for Nonprofits Licence Information

Learn about the licensing differences between Marketing Cloud Engagement for Industries and Marketing Cloud Pro Edition.

Salesforce for Nonprofits packages Marketing Cloud Engagement for Industries (MCNGO) with a balance of price and features. Our goal is to provide Marketing Cloud to as many nonprofits as possible. The MCNGO edition closely matches the features and functionality in the Marketing Cloud Pro edition, with the following exceptions:

Item	Pro Edition Total	MCNGO Edition Total
API Calls	2,000,000	100,000
Automations	15,000	10,000
Contacts	15,000	10,000
Data Storage	15	5
Super Messages	2,500,000	750,000

Item	Pro Edition Total	MCNGO Edition Total
Users	15	5

Note
If you need to increase any of these limits, contact your Account Executive.

Learn more about Marketing Cloud editions in How to Select the Right Marketing Cloud Edition.

Related Links

- Learn About Email Templates