**Welcome to the Salesforce Marketing Cloud**

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Welcome to Salesforce Marketing Cloud!

This workbook was designed to welcome you to the Marketing Cloud and assist you as you begin your path to power 1:1 customer journeys.

You can use this workbook to follow along while you set up your account and get a general overview of the platform.

* We invite you to join the Getting Started with Email Webinar Series (<https://webevents.force.com/s/marketing-cloud.html>) where we share how to get you up and running with the Marketing Cloud. The 5 steps in this workbook align to the 5 webinars in the series.

# 

# Marketing Cloud Fundamentals

## Account Login and Navigation

Use this worksheet to access the email application and navigate through everyday situations.

## You’ll want to ensure that you have the correct username and password. If you do not have this information, you’ll need to reach out to your account administrator or Global Support at [help@exacttarget.com](mailto:help@exacttarget.com).

1. **Marketing Cloud Home Page Navigation**

Now let’s determine how to find out account information. In the top right corner you will see your account name. Hover over your account name to find your Member Account ID, or MID. You will need to know your MID when you are logging a case with Global Support.

1. **Member Account ID**

|  |
| --- |
| Member Account ID (MID) |
|  |

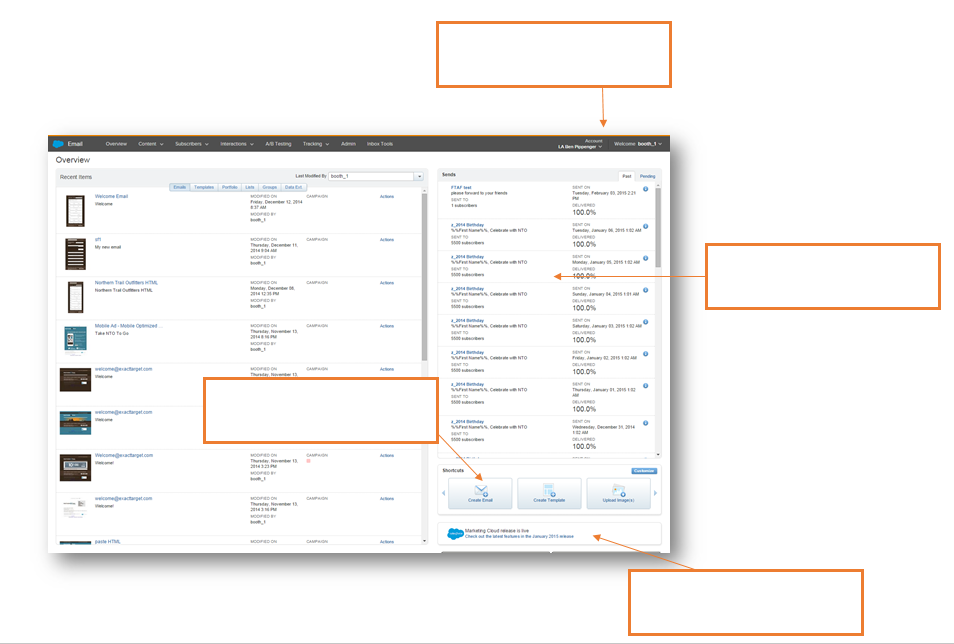
1. **Marketing Cloud Home Page Navigation**

For the next activity you will get the chance to navigate through the Marketing Cloud homepage. Take a minute to label the different areas of the homepage and highlight areas that you would like to learn more about or think might be helpful to understand.

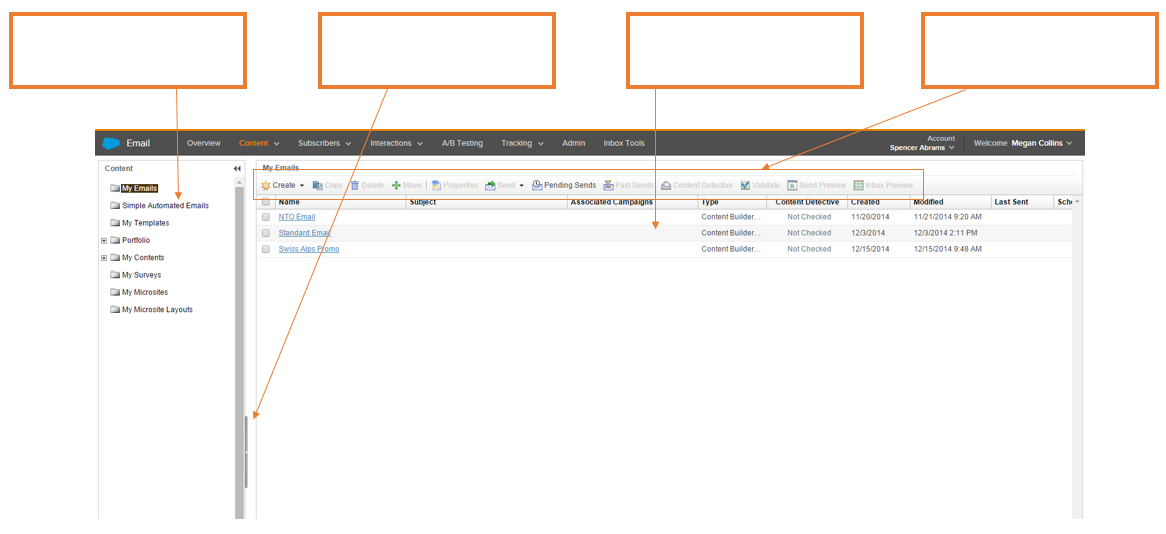


1. **Email Navigation**

Follow along with the webinar to fill in the two diagrams below including the Email application home page and inside the Email application workspace.

****

1. **Email Application Home Page**
2. **Email Application Workspace**

****

1. **Creating Folders**

Take time now to organize your thoughts. Jot down the folders you plan to make so you can keep organized in the application. You can use the following questions to get you thinking.

* What kind of campaigns will you be sending?
* Will you break it down by season/quarter?
* Do you have a series of emails that could be a folder?
* Would you rather group it by content? Accessories, Shoes, Women, Men etc.

|  |  |
| --- | --- |
| **Creating your Folders** | |
| Folder Title | What’s included |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

1. **Security Settings**

Use the following activity to identify how you will manage your security settings. You may need to reach out to another department to set the correct security options for your company.

|  |  |
| --- | --- |
| **Manage your Security Settings** | |
| When would you like your session to automatically timeout? | ❑ 20 min ❑ 1 hr ❑ 2 hrs ❑ 4 hrs ❑ 8 hrs |
| Does your account require secure connections? | Yes or No |
| Do you want your login to expire after inactivity? | ❑ 30 days ❑ 60 days ❑ 90 days ❑ 1 year ❑ Never |
| How many login attempts are acceptable before a lockout? | ❑ 3 ❑ 5 ❑ 10 |
| Do you want your account to count invalid logins across sessions? | Yes or No |
| What is your minimum username length? | ❑ 4 ❑ 6 ❑ 8 ❑ 10 |
| How long do you want your Device Activation Code lifetime to be? |  |
| How long do you want your device to be inactive before it requires reactivation? |  |
| What is your minimum password length? | ❑ 6 ❑ 8 ❑ 10 |
| How complex do you want your password to be? | How many alpha? How many numeric? How many special characters? |
| How many passwords do you want your account to remember? |  |
| When do you want your user password to expire? | ❑ 30 days ❑ 60 days ❑ 90 days ❑ 1 year ❑ Never |
| Do you want to exclude API users from password expiration? | Yes or No |
| Would you like a password change confirmation email? | Yes or No |

1. **My Users**

In this activity you’ll think through the different users that you will need for your account. Think about the different permissions they will need in order to be successful. If you need more information on permissions please visit [help.exacttarget.com](http://help.exacttarget.com/en/documentation/exacttarget/enterprise/enterprise_20_overview/roles/)

When defining the people in your organization that will have access to the Email application, below are some items to be thinking about:

* Who, in your company, is going to access the Salesforce Marketing Cloud Email Application?
* Each user in the Email application has a role that determines what tasks they can complete.
* What roles need to be created for your company?

Before you start building users in your account, list and define the users and their properties.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Username | Full Name | Reply Email | Access | Permissions | Temporary PW |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

1. **Sender Profile**

Let’s think about what your From Names will look like for your campaigns.

|  |  |
| --- | --- |
| From Name Discovery | |
| Is your From name a user from the drop down menu? | Yes or No |
| Do you need to add a specific name in? | Yes or No |
| If you need a specific name, what will it be? | a.  b.  c.  d. |
| Do you have permission to use this name and email? | Yes or No |

1. **Delivery Profile**

It is important to know the difference between a Commercial Email and a Transactional Email. Let’s review that now!

|  |
| --- |
| CAN- SPAM |
| The Assault of Non- Solicited Pornography and Marketing Act, or the CAN-SPAM Act, that is the US federal standards |
| Commercial emails are when the primary purpose of the message is to deliver commercial content. These MUST include your physical mailing address and provide an opt-out/unsubscribe mechanism. |
| Examples from your program include: |
| Transactional emails are when the primary purpose is to deliver transactional content. An unsubscribe link is not required in transactional messages. |
| Examples from your program include: |

Each Email and or Campaign will have specific header and footer requirements. Let’s get your requirements in order for your first email.

|  |  |  |  |
| --- | --- | --- | --- |
| Email Name | Associated Campaign | Header | Footer |
|  |  |  |  |

1. **Send Classification**

Let’s get more specific. Which emails do you have that are Commercial and which emails do you have that are Transactional?

Reminder: If you choose to use a unique header, note that you will have to create a new content area.

|  |  |  |  |
| --- | --- | --- | --- |
| Email | Type | Sender Profile | Delivery Profile |
|  | ❑ Commercial  ❑ Transactional | ❑ | ❑ |
|  | ❑ Commercial  ❑ Transactional | ❑ | ❑ |
|  | ❑ Commercial  ❑ Transactional | ❑ | ❑ |
|  | ❑ Commercial  ❑ Transactional | ❑ | ❑ |
|  | ❑ Commercial  ❑ Transactional | ❑ | ❑ |

1. **BrandBuilder**

BrandBuilder is a private labeling tool that allows you to provide a branded experience to both your application users and your subscribers. Take the time now to make sure you have built your brand to the highest standards!

|  |  |  |
| --- | --- | --- |
| **BrandBuilder Checklist** | | |
| **Action Items** | **Completed** | **Need Review** |
| Add your logo/header background color to every screen, including the login screen | ❑ |  |
| Change the color scheme of the primary navigation buttons | ❑ |  |
| Brand your survey and Forward to a Friend landing pages as well as the Profile and Subscription Center | ❑ |  |

Still have questions? List out your open questions below and use help.exacttarget.com to find your answers. If you run into any difficulties finding answers, remember you can always reach out to Global support at help@exacttarget.com .

|  |  |
| --- | --- |
| **Have a question about your account? We have an answer.** | |
| **Questions** | **Answers** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

### **Step 2: Subscribers**

### **Subscribers Rule**

### Which of the following is not a part of Subscribers Rule:

### Serve yourself

### Honor their unique preference with regard to communication, content, frequency & channels

### Deliver them timely, relevant content that improves their lives

### Serve the individual

### **Identify Data Sources**

### For this activity, you can list the data sources that you will use for your first send.

|  |  |  |
| --- | --- | --- |
| File Name | Data Source | Notes |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### **Identifying Profile and Preference Attributes**

### **Profile Attributes**

### Take a moment to define your profile attributes. Think of all of the fields that you will need to power your targeted, relevant communications and for your future filters and groupings.

### Examples: Birthday, gender, location etc.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Profile Attributes** | | | | | | | | |
| **Attribute** | **Type** | **Required** | **Default** | **Hidden** | | **Read-Only** | | **Default Value** |
| Email | Text | ◼ | ◼ | ❑ | ❑ | |  | |
| Full Name | Text | ❑ | ◼ | ❑ | ❑ | |  | |
| User Defined | Boolean | ❑ | ◼ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
| **Attribute** | **Type** | **Required** | **Default** | **Hidden** | **Read-Only** | | **Default Value** | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |
|  |  | ❑ | ❑ | ❑ | ❑ | |  | |

### **Preference Attributes**

### Take a moment to think about the possible ways you can use preference attributes to power your campaigns. Remember, preference attributes are yes / no scenarios.

### Example: HTML, Monthly Newsletters, New Product Announcements etc.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Preference Attributes** | | | | | | |
| **Attribute** | **Default** | **Hidden** | | **Read-Only** | | **True or False** |
| HTML Email | ◼ | ❑ | ❑ | |  | |
|  | ❑ | ❑ | ❑ | |  | |
|  | ❑ | ❑ | ❑ | |  | |
|  | ❑ | ❑ | ❑ | |  | |
|  | ❑ | ❑ | ❑ | |  | |
|  | ❑ | ❑ | ❑ | |  | |
|  | ❑ | ❑ | ❑ | |  | |
|  | ❑ | ❑ | ❑ | |  | |
|  | ❑ | ❑ | ❑ | |  | |
|  | ❑ | ❑ | ❑ | |  | |
|  | ❑ | ❑ | ❑ | |  | |

### **Managing Lists**

### Let’s think about what communications you can manage with lists? In the table below, outline the lists you will need to create in your account.

### Example: Monthly Newsletter, Weekly Specials, New Products or Class information etc.

|  |  |
| --- | --- |
| Lists | Description |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
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### 

### **List Management**

### Follow along with the webinar to navigate through a list’s properties, subscribers and tracking information. Fill in the blanks for the diagrams below for each section.

### **Subscribers Tab**

### C:\Users\megan.collins\Desktop\Workbook\lists activity.pngThe Subscribers tab is the initial screen you will see when you choose a list. Here you will see all of the subscribers included in your list. Fill in the blanks to get a better idea of how to manage your lists.

### **Properties Tab**

### The properties tab shows general information about your list and also shows a count of how many subscribers are in the list. Fill in the blanks to learn more about your list’s properties.

### **C:\Users\megan.collins\Desktop\Workbook\list properties.png**

### **Tracking Tab**

### The tracking tab is the final step of your list navigation. Here you will see the most recent sends as well as your list composition. Fill in the blanks to see how you can track the subscribers in your list.

### C:\Users\megan.collins\Desktop\Workbook\tracking lists.png

Still have questions? List out your open questions below and use help.exacttarget.com to find your answers. If you run into any difficulties finding answers, remember you can always reach out to Global support at help@exacttarget.com .

|  |  |
| --- | --- |
| **Have a question about your account? We have an answer.** | |
| **Questions** | **Answers** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Step 3: Creating Your Email**

### **Path to Email Success**

### You’ve learned a lot! Let’s take a second to review the Path to Email Success. In this section we will be focusing on getting organized with Portfolio, creating templates and making sure you have everything ready to send your email.

### **Portfolio**

### **Content Organization**

### For the next activity, let’s think of how you are going to organize your Content. Outline your folder structure within Portfolio and how you plan on utilizing the folders.

|  |  |  |  |
| --- | --- | --- | --- |
| Content Organization | | | |
| Folder Name | Images Included | Content Included | Media Files Included |
|  |  |  |  |
|  |  |  |  |
| Folder Name | Images Included | Content Included | Media Files Included |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### **Email Building Checklist**

### Before you get started building an email, let’s make sure you have everything you need. Refer to this checklist as you begin building your emails and before you know it, you’ll be a pro!

|  |  |
| --- | --- |
| Email Checklist | |
| Are all of your images created? | **❑** |
| Have you checked the file types that are supported? | **❑** |
| Have you created a banner? | **❑** |
| Do you have all of your content uploaded into Portfolio? | **❑** |
| Do you have your content placement identified? | **❑** |
| How many images/ content areas will you need? | **❑** |
| Have you chosen a template? | **❑** |
| Have you reviewed the Template Size Guidelines | **❑** |
| Will you need to build HTML code outside of the app? | Y or N |
| Do you know your hexidecimal color codes? | **❑** |
| Do you know the border color for the banner, if needed? | **❑** |
| Do you know the background color, if needed? | **❑** |
| Do you have a header that is less than 600 pixels? | **❑** |
| Do you have a subject line? | **❑** |
| Do you have your preheader identified? | **❑** |

### **Template Selection**

### Trying to figure out what templates work for you? Go ahead and pick a few that you think might be useful for different emails.

### 

### A \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ B \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ C \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ D \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 

### 

### E \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ F \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ G \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ H \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 

### I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ J \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ K \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 

### L \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ M \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### **Content Forms**

### Consider the different forms of content and list how you can utilize them in your emails

|  |  |
| --- | --- |
| Content Forms | How will you use them? |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

1. **Hexidecimal Color Code**

Use this next activity to gather the correct hexadecimal color codes for your emails. Then you’ll be able to quickly refer back to it if you need to add a spice of color! Different colors may need to be used for different parts of your email.

Example: FFFFFF used for Border Color

|  |  |
| --- | --- |
| Hexidecimal Color Code | |
| Code # | **When to use this color** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

1. **HTML Checklist**

In order to create an HTML template, you need ensure the appropriate additions are made to your HTML code. Use this as a checklist to have a completed HTML code before creating a template.

|  |  |
| --- | --- |
| HTML Checklist | |
| Email Open Tracking | ❑ |
| Content Areas | ❑ |
| Tracking Alias | ❑ |
| CAN-SPAM Compliance | ❑ |
| Personalization Strings | ❑ |

Still have questions? List out your open questions below and use help.exacttarget.com to find your answers. If you run into any difficulties finding answers, remember you can always reach out to Global support at help@exacttarget.com .

|  |  |
| --- | --- |
| **Have a question about your account? We have an answer.** | |
| **Questions** | **Answers** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Step 4: Testing & Sending Email**

1. **Workflow**

Below is a diagram for the workflow you will walk through when testing and sending an email.

1. **Before you Send**

You want to make sure you send the perfect email. This list will help you

|  |  |
| --- | --- |
| Before you Send Checklist | |
| Review the deliverability tips to ensure that your email reaches as many subscribers as possible. | ❑ |
| Run the Spell Check in the content areas in your email. This is done within each content box by clicking the Spell Check icon, or by selecting Edit > Check Spelling. | ❑ |
| Preview your email using Send Preview | ❑ |
| Run Content Detective and make any necessary updates | ❑ |
| Validate your email | ❑ |
| Perform a test delivery of your email | ❑ |

1. **Test Sending**

Before you begin testing, think about who you want to receive your test emails. These may include subscribers who are approvers, key stakeholders, and additional members of your email team.

List the email addresses that you would like your test emails to be sent to. You can send to up to 5 email addresses at one time.

|  |
| --- |
| Test Email Addresses |
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |

1. **Sending Your Email**

Each type of send option has different steps. Let’s keep organized by referring to the following guides for each unique type of send.

|  |  |  |
| --- | --- | --- |
| Test Send | Simple Send | Guided Send |
| From the send menu, select Test Send | From the send menu, select Simple Send | From the send menu, select Guided Send |
| Enter up to five email addresses to receive the test send | Review Subject and From Name, select a List for sending, and a send data and time | Click Next on the first screen of the Wizard |
| Click Send | Click Send | Select the list(s) or group(s) to send to |
| Confirmation is displayed on screen | Confirm Send | Select Exclusion Lists (if required) |
|  |  | Modify the subject, From Options, Send Options, and Test Options (if required) |
|  |  | Select to send the email immediately, or schedule for a specific date and time |
|  |  | Review and confirm the configuration |
|  |  | Click Send |
|  |  | Confirmation is displayed in the wizard when your email has been sent/scheduled. Click Finish |

Still have questions? List out your open questions below and use help.exacttarget.com to find your answers. If you run into any difficulties finding answers, remember you can always reach out to Global support at help@exacttarget.com .

|  |  |
| --- | --- |
| **Have a question about your account? We have an answer.** | |
| **Questions** | **Answers** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Step 5: Tracking Your Email**

1. **What is tracking?**

Tracking is an aggregated collection of data that allows you to view critical elements. Which of the following elements do you think will help you track your emails?

|  |  |  |
| --- | --- | --- |
| Tracking Elements | | How will it help? |
| Deliverability Rate |  | |
| Undeliverables |  | |
| Unique Opens |  | |
| Total Opens |  | |
| Open Rate |  | |
| Unique Clicks |  | |
| Total Clicks |  | |
| Click Rate |  | |
| Unengagement |  | |
| Conversions |  | |
| Surveys |  | |
| Forward to a Friend Activity |  | |

1. **Tracking Grid**

Which of the following elements do you think will help you track your emails and would be most valuable to having included in your workspace? Select which columns to display in the Tracking grid.

|  |  |  |  |
| --- | --- | --- | --- |
| Tracking Grid | | | |
| ID | ❑ | Total Clicks | ❑ |
| Name (This column is required to be visible) | ❑ | Unique Click-Through Rate | ❑ |
| Subject | ❑ | Open Rate | ❑ |
| From Name | ❑ | Undeliverables | ❑ |
| Date/Time Sent (This column is required to be visible) | ❑ | Deliverability Rate | ❑ |
| Status | ❑ | Unsubscribes | ❑ |
| Emails Sent | ❑ | Unsubscribes Rate | ❑ |
| Delivered | ❑ | Survey Responses | ❑ |
| Unique Opens | ❑ | Unique Conversions | ❑ |
| Total Clicks | ❑ | Total Conversions | ❑ |
| Unique Clicks | ❑ | FTAF-Forwarders | ❑ |
| Total Clicks | ❑ | FTAF- Recipients | ❑ |
|  |  | FTAF- Subscribers | ❑ |

1. **Creating Lists from Tracking Data**

Creating a list from your tracking data is very important. Follow along with the steps below to get you through your first list creation, then you’ll be a pro!

|  |  |
| --- | --- |
| Creating a List from Tracking Data | |
| 1. Click the hyperlinked item you would like to create a list for | ❑ |
| 1. Click Copy All in the toolbar | ❑ |
| 1. Select to add to an Existing List or New List    * + Existing List: Select the list from the dropdown      + New List: Enter a Name, description and visibility | ❑ |
| 1. Click Copy | ❑ |

1. **How to Share**

Certain tabs allow you to create a PDF, Excel file or both. Before starting to track your subscriber data you’ll need to know what form of tracking information your team or certain individuals would like to view. Use the below table to help outline who you will send tracking to, how you will send it over, and how frequently you will send it.

|  |  |  |
| --- | --- | --- |
| Tracking Information | | |
| Team or Employee Name | Document Type | How often do they need it? |
|  | PDF ❑ Excel ❑ | Daily ❑ Weekly ❑ Bi Weekly ❑ Monthly ❑ Bi Monthly ❑ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
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