



5 Essential Data Configurations for Marketing Cloud Engagement

Sarah Smith

Sercante, Marketing Automation Strategist

Thanks To Our Incredible Sponsors!

SERCANTE

salesforce

stensul

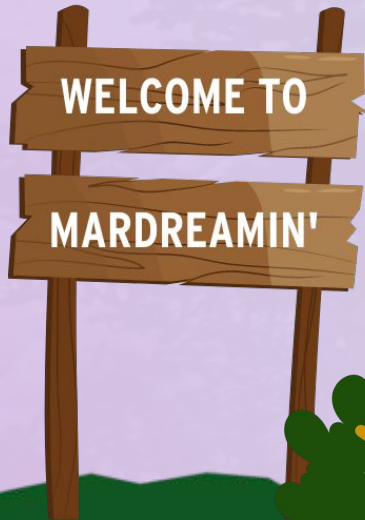
PFL

 **GRIDMATE**


THE SPOT
by SERCANTE

FÍONTA

Goals



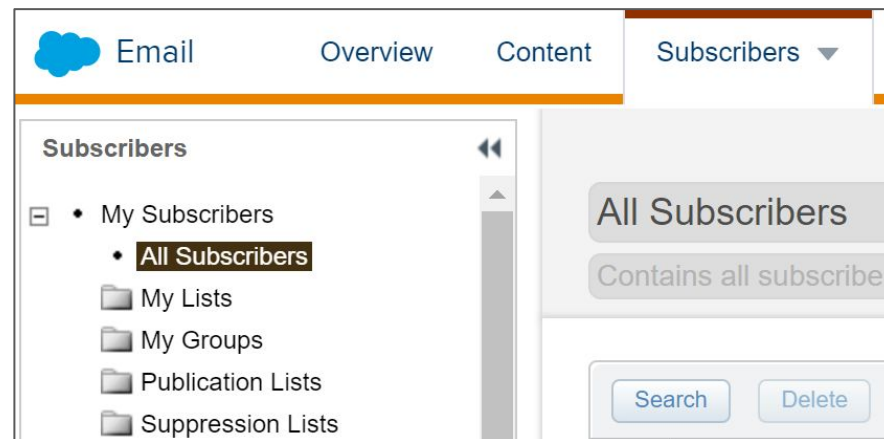
1. Subscribers list vs Synced Subscriber Data
2. Data Relationships
3. System Data Views
4. Send Log
5. Contact Models



**Keep the Subscribers list
in Sync with Updated
Subscriber Data**

What is the All Subscribers List?

- **The master list / gatekeeper** of all Email Subscribers in your account
- **Contacts added to lists** are added automatically
- **Contacts added to data extensions** are added when emailed for first time



The Problem

Any updates to standard data extensions* don't automatically update the All Subscribers list attributes

Data Extension

All Subscribers List

Email Gets Sent To

sarah.smith@sercante.com

sarah.smith@sercante.com

sarah.smith@sercante.com

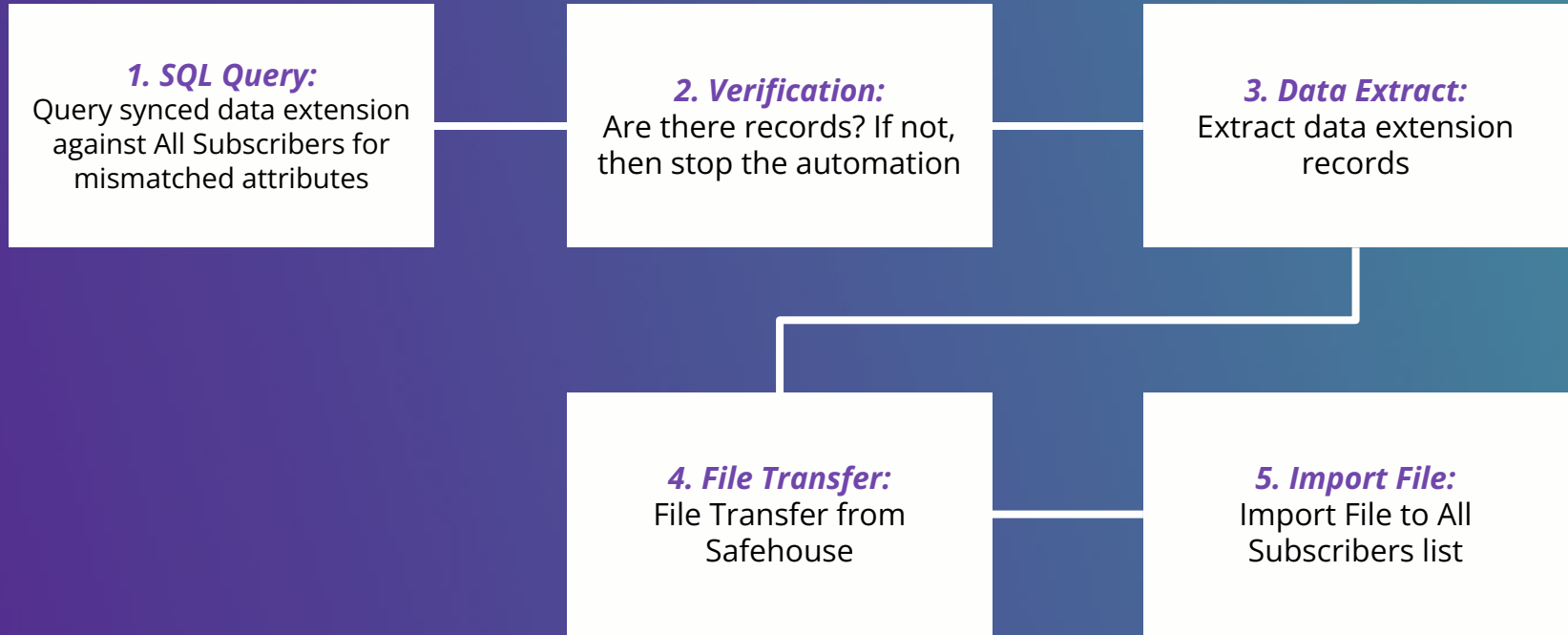
(updated from sync)
sarahsmith@outlook.com

sarah.smith@sercante.com

sarah.smith@sercante.com

* Salesforce Data Extensions will update email address in the All Subscribers list at the time of send

The Automation Steps





Leverage Data Relationships for Extended Data Filtering

SQL Query VS. Data Filter

SQL Query

1. Standard Data Extension
2. Join data from multiple data extensions
3. SQL-based filters and functions - knowledge of SQL required
4. Run ad-hoc or automated

Data Filter

1. Filtered Data Extension
2. Filter results from one data extension
3. Accessible - follows “clicks not code” philosophy
4. Run ad-hoc or automated



Data Relationships: Meeting in the Middle

- Creates a relationship between two data extensions
- Extends data filter ability to additional attributes from linked data extensions
- Akin to a Salesforce Cross-Filter Report

Properties

Name (required)
ContactstoEmailClicks

External Key
[Empty field]

Description
[Empty field]

Fields

? For this Relationship to be used inside a Data Filter, both related items must be Data Extensions. Also, one item must have a defined primary key and have a unique value. If the checkbox below is checked, this relationship meets the criteria to be used in a Data Filter.

This relationship can be used within a Data Filter

Field Name	Field Type	Field Type	
Salesforce Contacts	Text	Emails Clicks	Text
Id	Text	SubscriberKey	Text Add

Create Filtered Data Extension

Source **Salesforce Contacts** [change](#)

Fields

Search

- Placed_Status__c
- Status__c
- FirstName
- LastName
- Active_User__c
- Owner_Name__c
- Last_User_Login__c
- CreatedDate
- Was_Profile_builder_filled__c
- Last_Activity_Date__c
- Active_Submissions__c
- Name
- MobilePhone

Data Relationships

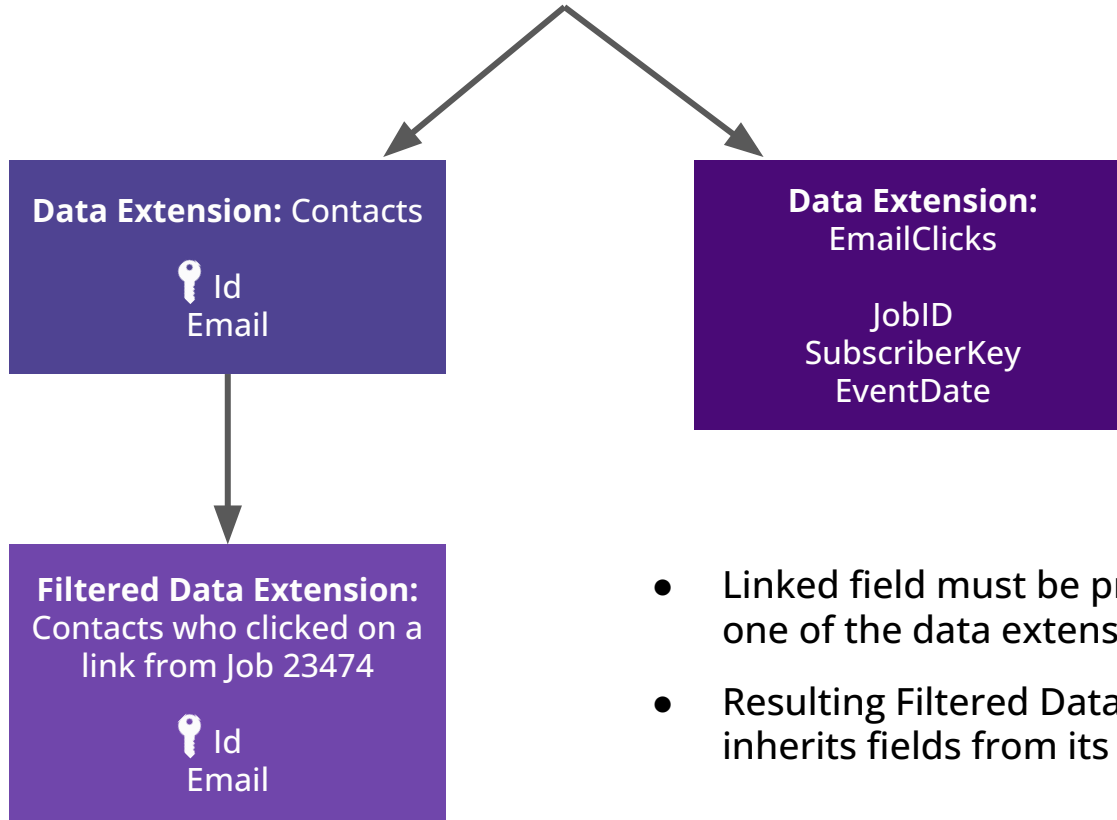
- ContactstoEmailClicks**
 - BatchID
 - Domain
 - EventDate
 - IsUnique
 - JobID
 - LinkContent
 - LinkName
 - SubscriberKey
 - TriggeredSendCustomerKey
 - TriggererSendDefinitionObjectID
 - URL

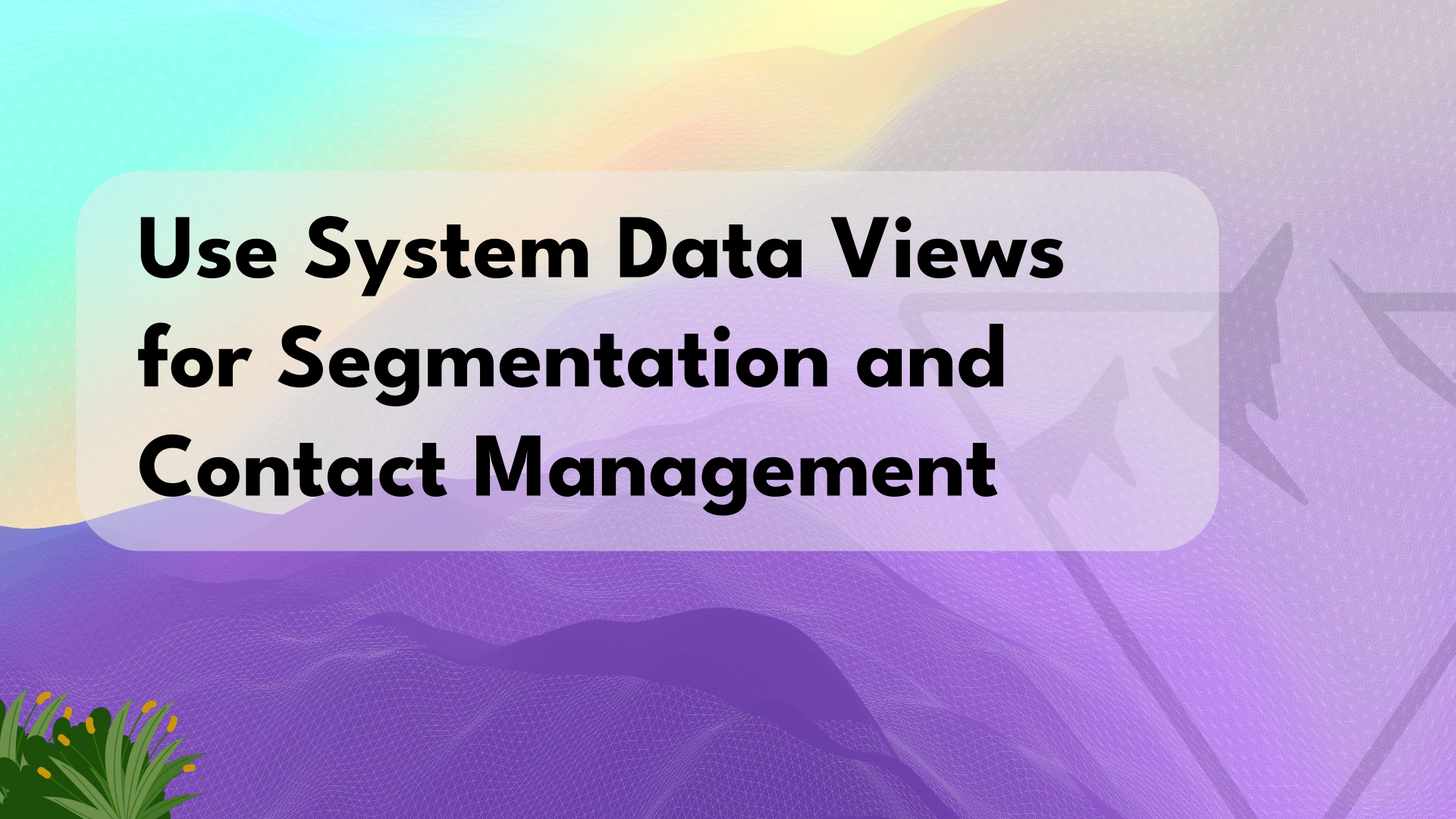
Create Filter

JobID is equal to 23474



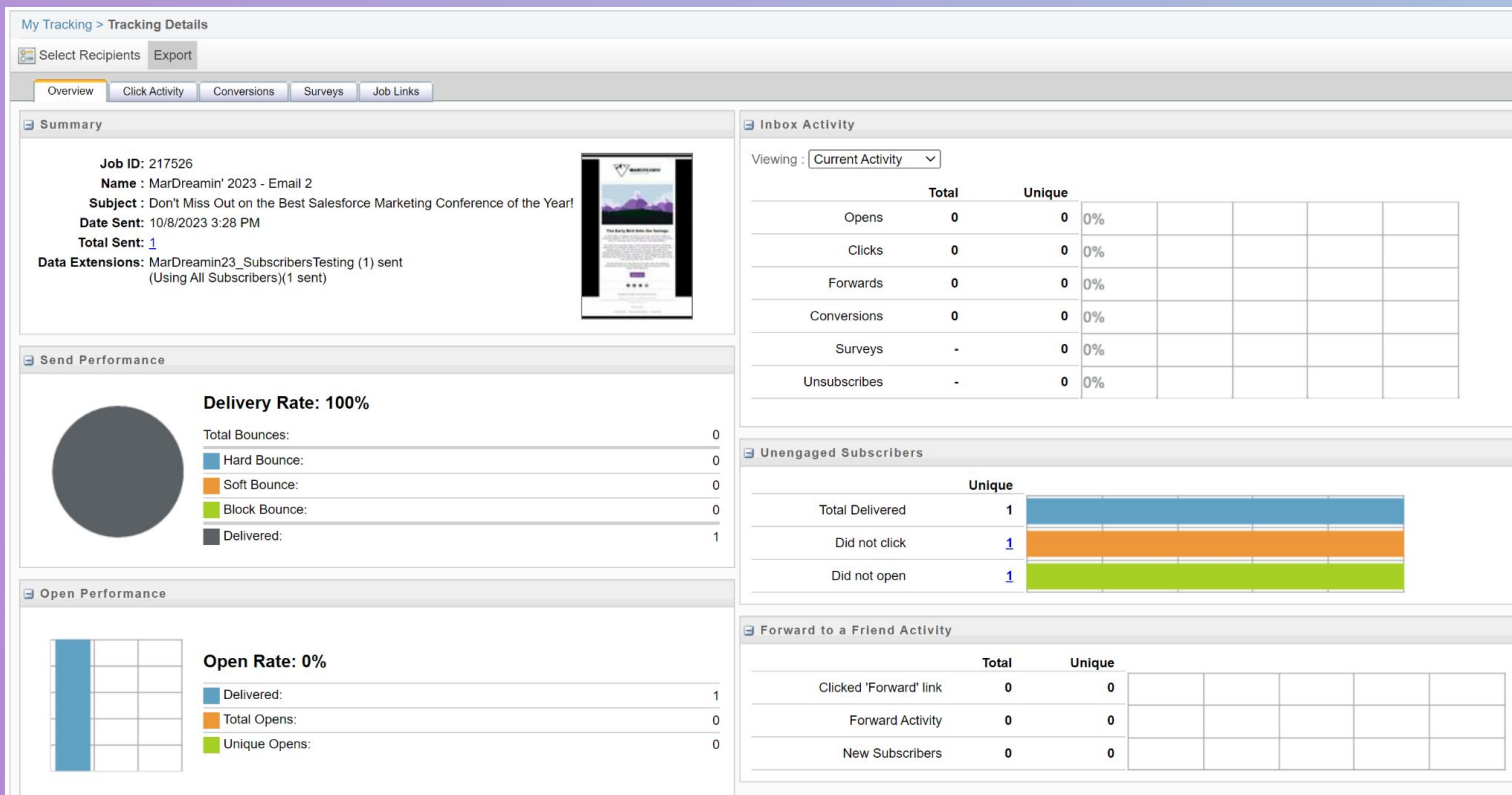
Id SubscriberKey





Use System Data Views for Segmentation and Contact Management

Email Tracking Report




What are Data Views?

- [Data tables](#) that store up to six months of subscriber, engagement, and journey information
- **Examples:** _Subscribers, _Job, _Sent, _Open, _Click, etc.
- **Can be queried with SQL**

Data Extensions > Data View Templates

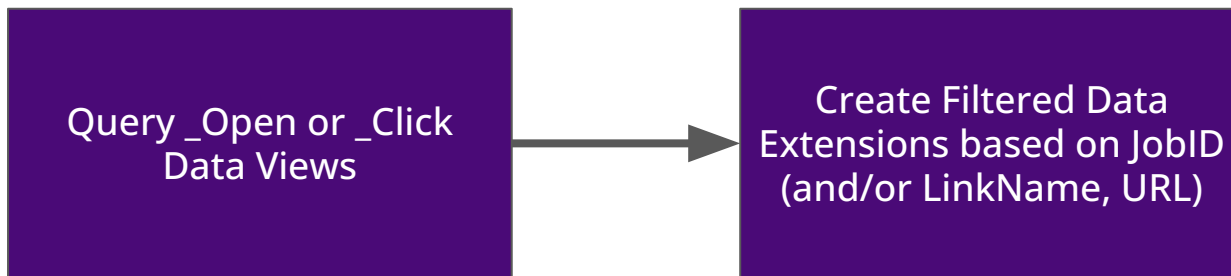
Data View Templates

Search 

<input type="checkbox"/>	Name	Type	Sendable	Record Count	Last Modified Date	Status
<input type="checkbox"/>	Sent_DataView	Standard	No	4,639,831	Thursday, August 17, 2023 2:27 PM	Available
<input type="checkbox"/>	Open_DataView	Standard	No	4,180,259	Thursday, August 17, 2023 2:27 PM	Available
<input type="checkbox"/>	Job_DataView	Standard	No	1,402	Thursday, August 17, 2023 2:27 PM	Available
<input type="checkbox"/>	Click_DataView	Standard	No	193,932	Thursday, August 17, 2023 2:27 PM	Available

Data Views Use Cases

Quickly create filtered data extensions to act as exclusion lists based off of email / mobile saturation, opens, or clicks



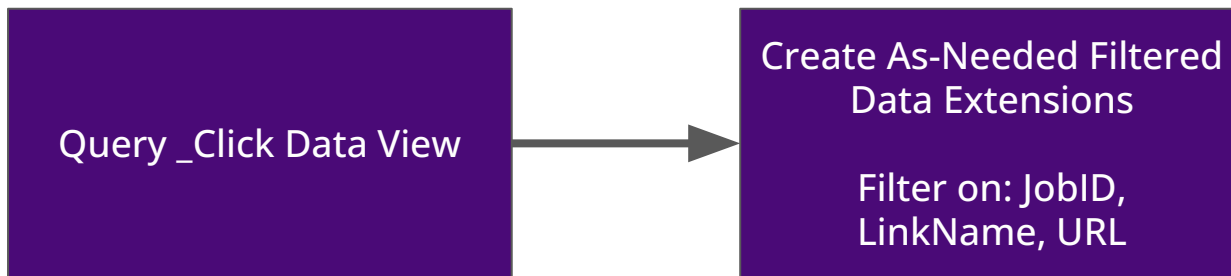
```
SELECT JobID  
      , SubscriberKey  
      , EventDate
```

```
FROM _Open
```



Data Views Use Cases

Segment subscribers who clicked on specific links to send targeted communications on similar categories



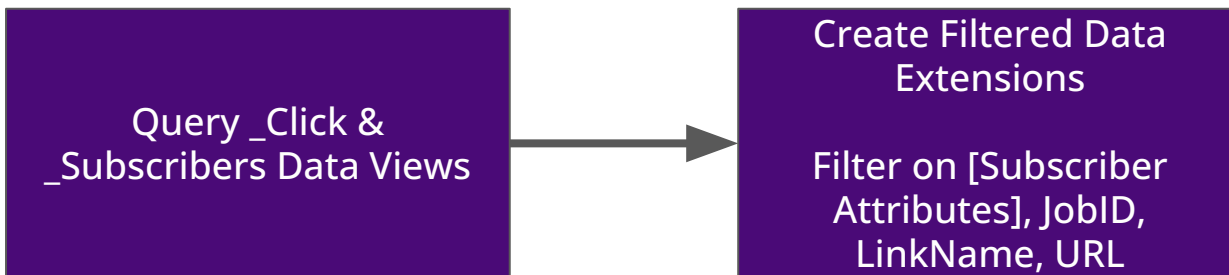
```
SELECT JobID  
      , SubscriberKey  
      , EventDate  
      , LinkName  
      , URL
```

```
FROM _Click
```



Data Views Use Cases

Track VIP subscriber engagement interests



```
SELECT c.JobID
      , c.SubscriberKey
      , c.EventDate
      , c.LinkName
      , c.URL
      , s.EmailAddress
      , s.Status

FROM _Click c
INNER JOIN _Subscribers s
ON c.SubscriberKey = s.SubscriberKey
```



Data Views Use Cases

Administrative uses

1. Monitor spam complaints, bounces, subscriber statuses
2. Monitor automation activities
3. Monitor Journey activities



Data Views for Contact Management



Unmailable and unsubscribed contacts are not automatically removed from your data extensions and lists



This can skew your reporting metrics and will still count towards your contact limit



Query Data Views for Subscriber statuses for contact deletion requests



Use an “administrative” Journey and Salesforce Update activities or script activities in Automation Studio to update the contact in your external CRM and unsync them



Extend the Power of the Send Log

What is the Send Log?

- Stores ongoing record of Send-Time data and subscriber-specific attribute data
- Similarities with Sent Data View, but differs in some key ways:
 - Only one Send Log data extension
 - Records error codes
 - EventDate can differ slightly
 - Populates automatically – no need for a query, automation, etc.
 - **Customize Send Log with personalization strings and AMPscript variables**

3,098,450

Records

Fields

Name	Data Type	Length	Primary Key
JobID	Number		<input type="checkbox"/>
ListID	Number		<input type="checkbox"/>
BatchID	Number		<input type="checkbox"/>
SubID	Number		<input type="checkbox"/>
TriggeredSendID	Text	36	<input type="checkbox"/>
ErrorCode	Number		<input type="checkbox"/>
EmailName_	EmailAddress	254	<input type="checkbox"/>
replyname	Text	254	<input type="checkbox"/>
replyemailaddress	Text	254	<input type="checkbox"/>
EmailAddr	EmailAddress	254	<input type="checkbox"/>
SubscriberKey	Text	50	<input type="checkbox"/>

Customized Send Log Use Cases

1. Faster debugging
2. Track KPIs on dynamic content with AMPscript variables
3. Multivariate testing
4. Nuanced tagging for reporting and segmentation




Get the Ultimate Insight into Your Marketing Activities

A lot of data exists in MCE, but often in fragmented places across the platform. Use queries to combine Data Views with the Send Log to create the Ultimate View.

- Consolidated
- Comprehensive
- Can be sliced and diced with filter activities
- Can be exported as flat files for BI/data viz

```
1 SELECT
2   s.AccountID
3   , s.OYBAccountID
4   , sl.JobID
5   , sl.ListID
6   , sl.BatchID
7   , sl.SubID AS SubscriberID
8   , s.SubscriberKey
9   , s.Domain
10  , s.TriggererSendDefinitionObjectID
11  , s.TriggeredSendCustomerKey
12  , sl.view_email_url
13  , s.EventDate AS SentEventdate
14  , b.EventDate AS BounceEventDate
15  , b.BounceCategoryID
16  , b.BounceCategory
17  , b.BounceSubcategoryID
18  , b.BounceSubcategory
19  , b.BounceTypeID
20  , b.BounceType
21  , b.SMTPBounceReason
22  , b.SMTPMessage
23  , b.SMTPCode
24  , b.IsFalseBounce
25  , c.EventDate AS ClickEventDate
26  , c.URL
27  , c.LinkName
28  , c.LinkContent
29  , j.FromName
```

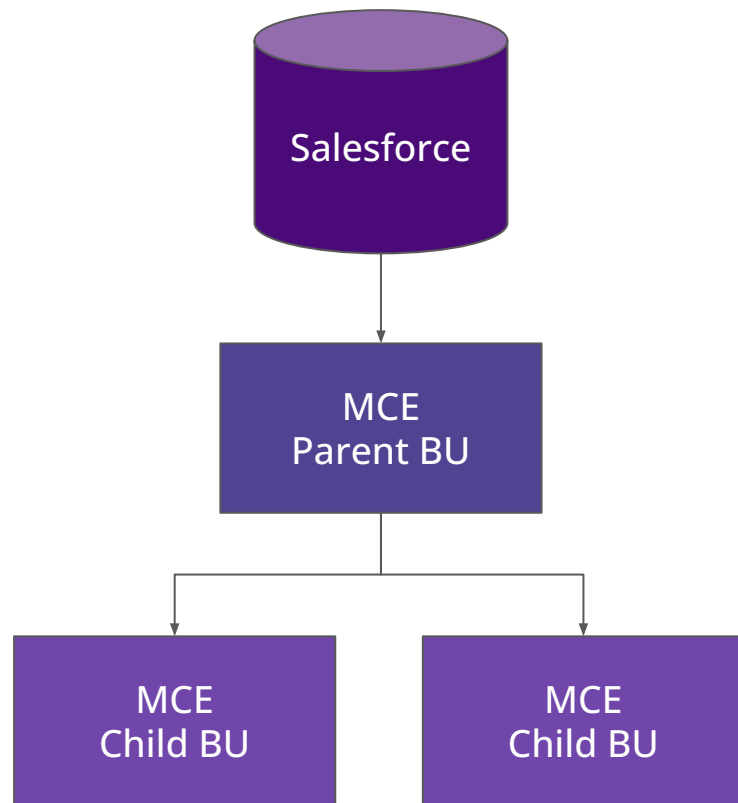
```
FROM SendLog sl
LEFT JOIN _Job j
  ON sl.JobID = j.JobID
LEFT JOIN _Sent s
  ON sl.JobID = s.JobID
  AND sl.ListID = s.ListID
  AND sl.BatchID = s.BatchID
  AND sl.SubID = s.SubscriberID
LEFT JOIN _Bounce b
  ON s.JobID = b.JobID
  AND s.ListID = b.ListID
  AND s.BatchID = b.BatchID
  AND s.SubscriberID = b.SubscriberID
LEFT JOIN _Open o
  ON s.JobID = o.JobID
  AND s.ListID = o.ListID
  AND s.BatchID = o.ListID
  AND s.SubscriberID = o.SubscriberID
  AND o.IsUnique = 1
LEFT JOIN ent._Subscribers sub
```

Set up Proper Contact Models for Journeys

What is a Contact Model?

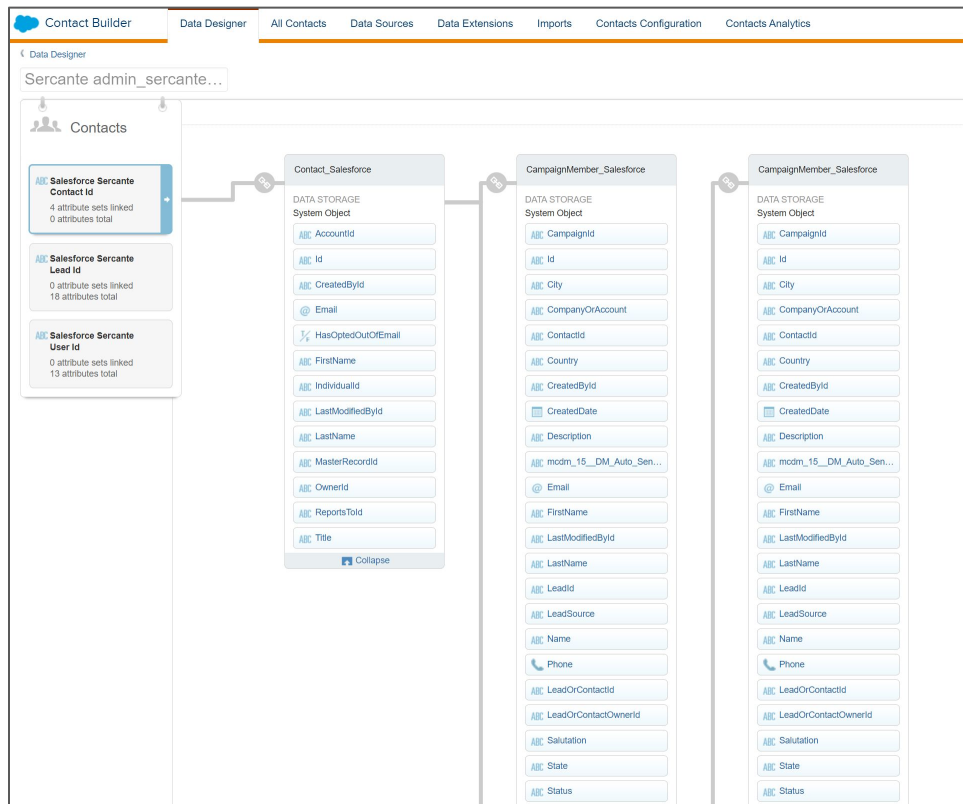
- Entity model that establishes relationships between data extensions and the Marketing Cloud Contact.
- Audience Builder > Contact Builder > Data Designer
- For Salesforce integrations: Contact Model is set up automatically
- Recommended set up for multiple BUs:
CRM sync → Parent BU → share access to Child BUs
 - In child BUs, the Contact Model **must be manually established**



Why set up a Contact Model?

Journeys!

- Only way to leverage Contact Data in Journeys
- Send tracking data back to SF



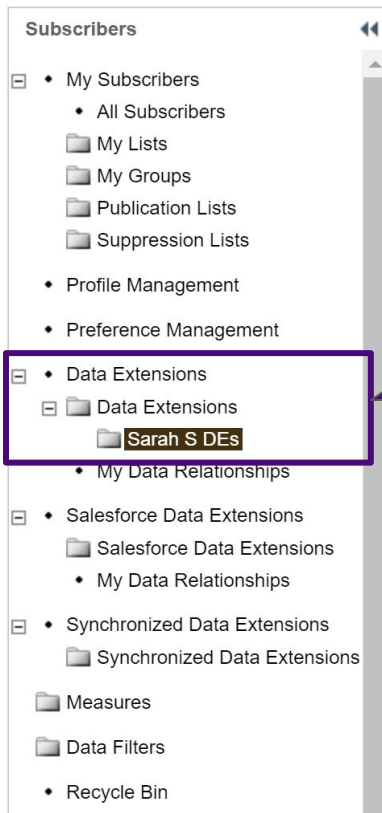
The screenshot shows the Salesforce Contact Builder interface. At the top, there are navigation tabs: Contact Builder, Data Designer (selected), All Contacts, Data Sources, Data Extensions, Imports, Contacts Configuration, and Contacts Analytics. Below the tabs, the 'Data Designer' section is active, showing a search bar with 'Sercante admin_sercante...'. On the left, there is a 'Contacts' section with three linked Salesforce objects:

- Salesforce Sercante Contact Id**: 4 attribute sets linked, 0 attributes total.
- Salesforce Sercante Lead Id**: 0 attribute sets linked, 18 attributes total.
- Salesforce Sercante User Id**: 0 attribute sets linked, 13 attributes total.

The main area displays three data storage system objects, each with a list of attributes:

- Contact_Salesforce**: AccountId, Id, CreatedBy, Email, HasOptedOutOfEmail, FirstName, IndividualId, LastModifiedBy, LastName, MasterRecordId, OwnerId, ReportsToId, Title.
- CampaignMember_Salesforce**: CampaignId, Id, City, CompanyOrAccount, ContactId, Country, CreatedBy, CreatedDate, Description, modcm_15_DM_Auto_Sen..., Email, FirstName, LastModifiedBy, LastName, LeadId, LeadSource, Name, Phone, LeadOrContactId, LeadOrContactOwnerId, Salutation, State, Status.
- CampaignMember_Salesforce**: CampaignId, Id, City, CompanyOrAccount, ContactId, Country, CreatedBy, CreatedDate, Description, modcm_15_DM_Auto_Sen..., Email, FirstName, LastModifiedBy, LastName, LeadId, LeadSource, Name, Phone, LeadOrContactId, LeadOrContactOwnerId, Salutation, State, Status.

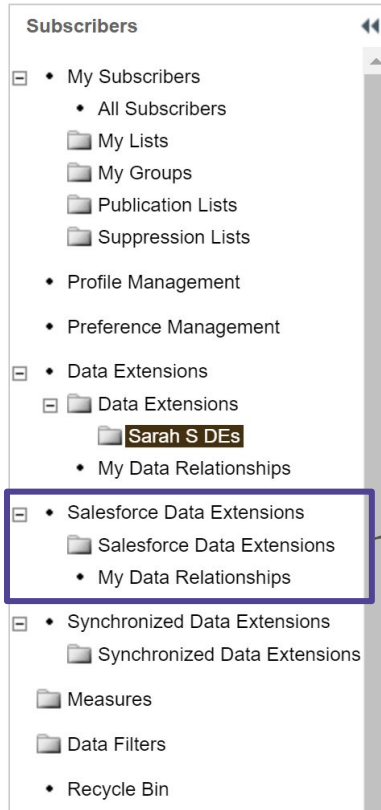
Data Extensions and Where to Keep Them



- Date Extensions stored in this main folder can be used in Journeys
- Data Extensions cannot be used in Journey Contact Data until set up in the Contact Model
- Tracking data cannot be sent back to Salesforce from the Send Flow*

* Emails in Journeys will give you the option to send tracking data back to Salesforce

Data Extensions and Where to Keep Them



- Data Extensions stored in this main folder give option to send tracking data back to Salesforce from Send Flow
- Data Extensions cannot be leveraged in Journeys

Takeaways

- Use automations to keep your data extensions in sync with the All Subscribers List
- Create Data Relationships between commonly associated data extensions for extended filtering capabilities
- Set up Data Views for granular insight into your email metrics, creating filtered lists, and admin tasks
- Use the Send Log – and build it out further – for the ultimate view into your marketing activities
- Data Extensions must be added to a Contact Model in order to be used as Contact Data in Journeys/Salesforce tracking data



Additional Resources

- [Mateusz Dabrowski - SFMC Enhanced Send Log](#)
- [Salesforce Data Views](#)
- [Personalization Strings in Marketing Cloud](#)
- [Salesforce Ben - Marketing Cloud Data Relationships Feature: Connect Data Extensions](#)
- [The Spot - Why You Should Delete Marketing Contacts Regularly](#)





Thank You!