

Company

Process Document to Build a Promotional Email Campaign in Responsys Interact EMD

Date

February 25, 2019

Company:

Company

Created By:

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The purpose of this document is to establish an understanding of the Email Execution Team on how to build, complete, and schedule a Promotional Email Campaign in Oracle's Responsys Interact Platform using the EMD (Email Messenger Designer).

Survey emails use most of the steps outlined in this document – you will just grab your Data sources from a different folder as specified when you receive the assignment.

Screenshots are for reference-only and not particular to a specific campaign.

<https://interact5.responsys.net/authentication/login/LoginPage>

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Create a Builder_QA_Checklist

Before you log into Responsys and continue reading this Process Document, you will need to start a Builder_QA_Checklist to make sure you have everything you need before you begin.

This Checklist serves as a Builder and QA reference document that follows the steps outlined in this Process Document. You will need this Builder_QA_Checklist to also complete certain steps within this Process Document.

This Checklist will also house the QA Buddy Process – which is a peer review process to ensure accuracy of email campaign set-up and deployment. Your QA Buddy is found in the Weekly Assignment sheet (a weekly spreadsheet with your campaign work assigned by Hayley Tubb, manager of the Email Execution Team).

1. Navigation to [Z:\Planning and Promotions\EMAIL - Execution Documents\YYYY Campaigns\Month\WKXX](#)
 - a. Create a new folder with the naming convention

YYYYMMDD_CampaignName

2. Then, navigate to [Z:\Planning and Promotions\EMAIL - Execution Documents\Templates\EMD](#).
3. Copy the Builder_QA_Checklist Template and the corresponding Link Table Template you need for your Campaign and paste into your newly created campaign folder from Step 1.
 - a. Rename your copies:
 - i. Builder_QA_Checklist → **YYYYMMDD_CampaignName_Builder_QA_Checklist**
 - ii. Link Table → **YYYYMMDD_CampaignName_LT**
 1. You'll use this Link Table in another section.

Import your Campaign Assets

When you start building a campaign, it's important you have all the assets you need. This includes:

- Audience Selection
- Link Tables
- Creative Content

Audience Selection

The Audience Selection is who your Email Campaign will go to. Audiences are determined by the Email Strategy Team and the Selection Team.

Email Strategy Team Contacts:

Selection Team Contacts:

Audience Selection data is provided by the Selection Team, and they will import this data into Responsys and notify you via email; or the Metadata spreadsheet housed in [Z:\Planning and Promotions\EMAIL - Execution Documents\YYYY Campaigns \Month\WKXX](#)

Sometimes this import can be delayed, but you can go ahead and build your Email Campaign while you wait on this data.

Example of Types of Audience Selection Data:

- Profile Extension Table (PET)
 - Housed in Responsys –updated frequently via API call to Company internal data systems and/or Responsys tracking
 - Found in Responsys Folder: !MasterData/
 - Data File Name:
 - PET_Profile_Daily
 - PET_Profile_Weekly
 - Send_Time_Recommendations *(see Process Document_Responsys Programs for more information)*
 - Uploaded by the Selection Team for each week
 - Found in Responsys Folder: !UnicaListCuts/
 - Data File Name:
 - EP_WKXX_MMDD_CampaignName_XXXXX
- Metadata
 - This actually isn't a data source that you will select for your Campaign. Campaigns using this type of data just mean that the information is "housed" in Responsys. You will only need to associate a TREATMENT_ID (covered on the Data Sources step) and an Audience Filter to your campaign.
- Filter
 - Denoted by the Selection Team which Filter you need in the Inclusions section when you build your campaign.
 - If using !UnicaListCuts PET, Filter found in Responsys Folder:
 - !MasterFilters/
 - If using Metadata SQL, Filter found in Responsys Folder:
 - Typically z_CRM_Filters/ unless otherwise noted
- Supplemental Data
 - SQL View
 - Created by the Email Builder for their specific campaign during set-up if specified. (Set-up instructions on the next page)
 - Typically if there is a dynamic piece of content within the campaign that will use a "flag" list of Company Services: X,Y,Z.
 - You will house in Responsys Folder: Corresponding Week's Folder/
 - Data File Name:
 - YYYYMMDD_CampaignName_Metadate_SQL
 - Supplemental Join (aka Join table)
 - If a data point is added after the fact of when selection is pulled or in other special circumstances, a special table called a Supplemental Join will be created. This information will be provided to you on a case-by-case basis and notated in the Weekly Assignment Sheet.
 - Typically found in Responsys Folder: the corresponding week's folder -OR- z_CRM_Supplemental/

Link Tables

Your Link Table Template should have been copied over in the “Create a Builder_QA_Checklist” Step. *If in doubt, navigate to <Z:\Planning and Promotions\EMAIL - Execution Documents\Templates\EMD> to copy and paste the Link table you need that corresponds with your campaign into your Campaign folder.*

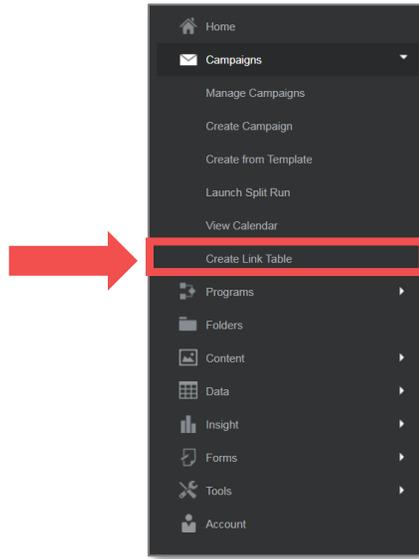
This file houses all the links needed for your Campaign. The Template includes the links that are in the Header and Footer of every email Campaign. You will need to add links to this Template for the contents of your email.

Prepping the Link Table

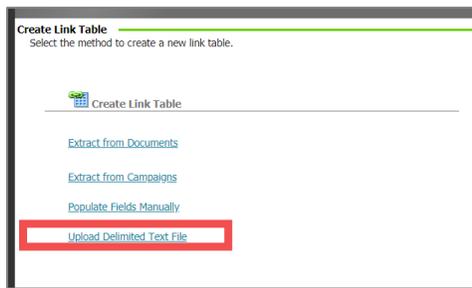
1. Open the Link Table Template on the server, then save it using this naming convention in your respective week’s folder as a .csv (**must be a .csv file**)
YYYYMMDD_CampaignName_LT.csv
2. In your newly created Link Table file, starting in Row 38 enter in the shipping banner, offer, body, and/or banner links from the Linking Doc that you need for your email campaign.
 - a. Column A = Link name
 - i. These are the bdy tags outlined in the Linking Doc
 - b. Column B = the actual URL
 - i. This is the link defined by the Site Merchants in the Linking Doc
 - c. Column C = Link Category
 - i. Make sure to include the Category of the link in Column C. Denoting the type of url link that is being used helps with reporting.

Uploading the Link Table to Responsys

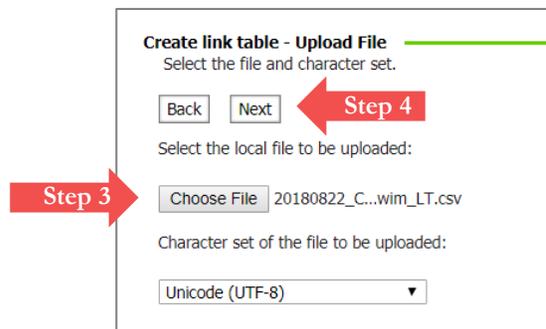
1. In Responsys, simply navigate to the left-hand sidebar and click the arrow to the right side of Campaigns. Then, click “Create Link Table”



2. Select “Upload Delimited Text File”



3. Choose the Link Table you just created on the server.
 - a. For this example, I've chosen 20180822_Clearance_Swim_LT.csv
4. Click “Next”



5. On the next page, make sure the following is selected:
 - a. Choose the character that separates the fields:
 - i. Select “Comma”
 - b. Choose the character used to quote field values:
 - i. Select “ (quotation mark)
 - c. Check this box if the first line contains field names

- i. Checkmark the box
6. Click “Next”

Create link table - Upload File
Confirm the file's characteristics.

Step 6

Preview of the initial portion of the uploaded file:

```
LINK_NAME,LINK_URL,LINK_CATEGORY,EXTERNAL_TRACKING,CREATED_DATE,MODIFIED_DATE,
BOE_ratings_and_reviews,{mirrorURL},jcpenny_homepage,,8/8/2018 12:49,8/8/2018 12:49,,
BOE_Store_Locator,{mirrorURL},jcpenny_homepage,,8/8/2018 12:49,8/8/2018 12:49,,
BOE_jcp_rewards,{mirrorURL},jcpenny_homepage,,8/8/2018 12:49,8/8/2018 12:49,,
```

Step 5a Choose the character that separates the fields:

- Tab
- Semicolon
- Comma
- Space
- Pipe
- Other

Step 5b Choose the character used to quote field values:

Step 5c Check this box if the first line contains field names

7. Match the Incoming Fields to the Link Table field. Use the screenshot below as a reference.
 - a. Set Created_Date_ and Modified_Date_ to "-- skip this field --"

Create Link Table - Upload file
Match fields from the incoming file with those of the new link table

Back Next **Step 8**

Field Matching

Incoming Fields	Sample Values	Matches with Link Table field:
LINK_NAME	BOE_ratings_and_reviews BOE_Store_Locator BOE_jcp_rewards	LINK_NAME ▼
LINK_URL	\${mirrorURL} \${mirrorURL} \${mirrorURL}	LINK_URL ▼
LINK_CATEGORY	jcpenny_homepage jcpenny_homepage jcpenny_homepage	LINK_CATEGORY ▼
EXTERNAL_TRACKING		EXTERNAL_TRACKING ▼
CREATED_DATE_	8/8/2018 12:49 8/8/2018 12:49 8/8/2018 12:49	-- skip this field -- ▼
MODIFIED_DATE_	8/8/2018 12:49 8/8/2018 12:49 8/8/2018 12:49	-- skip this field -- ▼
IOS_LINK_URL		IOS_LINK_URL ▼
ANDROID_LINK_URL		ANDROID_LINK_URL ▼

Step 7

8. Click "Next"
9. On the next page, Choose your Week's Corresponding Folder. And enter in the name of the Link Table from the server without the .csv file extension (ex. YYYYMMDD_CampaignName_LT).
10. Click "Create."

Create Link Table
Specify the valid name and location of the new link table.

Back Create

1. Select the folder to hold the new link table
2018_August_WK29 ▼

2. Enter a name for the new link table
20180822_Clearance_Swim_LT

-OR- Select the existing data source to be replaced
-- nothing selected -- ▼

Names can include only these characters and have length less than 100 characters:
A-Z a-z 0-9 space ! - = @ _ . [] { }

11. Your Link Table for your email campaign is now in Responsys.

Creative Content

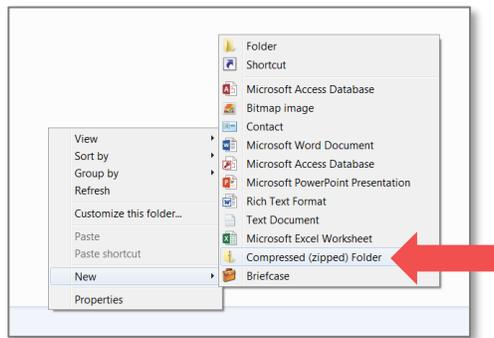
Once content has been passed through the Final Approval channels from the Creative Team and Email Strategy Teams, you will put a Final Version of the .jpeg in the Linking Doc (*see Z:\EMAIL - Execution Documents\Process and Training Documents\Process docs for the document outlining this Set-up*).

The Coding Team will then create the assets needed for your campaign (*sometimes if marked as Final early on, the coding team will pick it up and code it before you mark it as Final in the Linking Doc*). You will need to upload these assets to Responsys.

Coding Team Contacts:

Prepping the Body Creative Content

1. On the server, navigate to Y:\Internet_Creative_CODE_FOR_EMAIL_TEAM
 - a. Select the Folder: CORE
 - i. *This is typically where creative content is housed for Promotional Emails*
2. From here, you'll select "Body". Then, your corresponding Week and Campaign Folder.
 - o *Banners and Offers will be uploaded to Responsys by Aylesha Roberts as outlined in the [Z:\Planning and Promotions\EMAIL - Execution Documents\Process and Training Documents\Process docs\Process Document Offers and Banner Set-up](#)*
3. Once in your campaign folder, create a .zip folder by
 - a. Right-clicking in the window >>
 - b. New >>
 - c. Compressed (zipped) Folder



4. Name the folder:

MMDD_CampaignName_Assets.zip

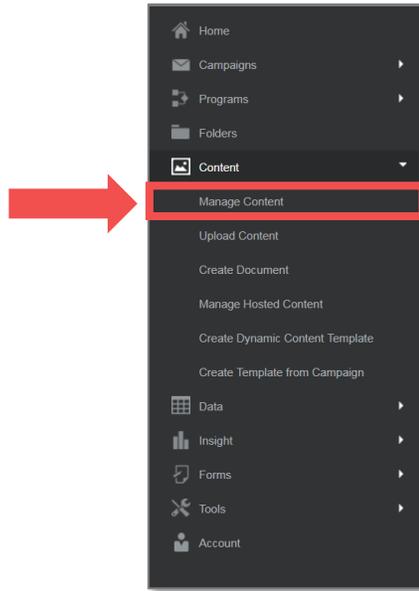
5. Drag and drop the following assets into your newly created .zip folder to make copies:
 - a. MMDDYYYY_CampaignName.html
 - b. Images (folder)

Name	Date modified	Type	Size
images	8/16/2018 2:56 PM	File folder	
0822ClearanceSwim_Assets.zip	8/16/2018 2:56 PM	Compressed (zipp...	229 KB
082218_CLEARANCE_SWIM.html	8/16/2018 9:16 AM	Chrome HTML Do...	9 KB
EMAIL_AUG_WK29_082218_CLEARANCE_...	8/13/2018 1:07 PM	JPEG image	554 KB

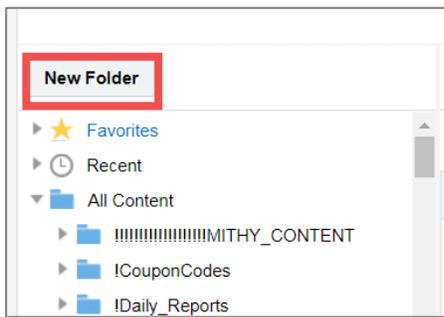
6. Now you're ready to upload to Responsys. We use a .zip folder because it allows the assets to easily upload to Responsys.

Uploading the Body Creative Content to Responsys

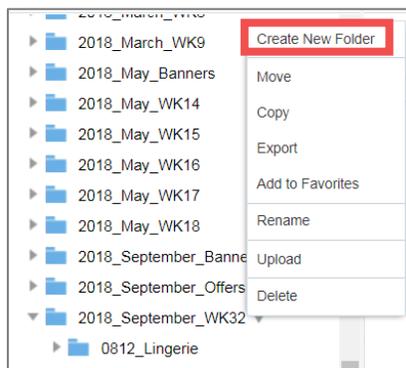
1. Once logged into Responsys, simply navigate to the left-hand sidebar and click the arrow to the right side of Content. Then, click “Manage Content”



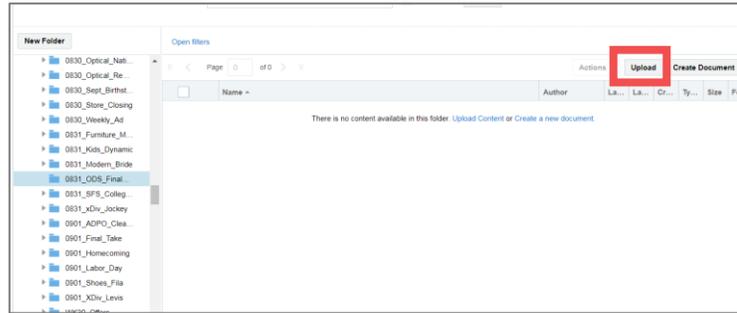
2. From here, find the corresponding week's folder for your email Campaign.
 - a. If a week's folder is not yet created, simply click “New Folder” at the top left-hand corner of the grey window and name it **YYYY_Month_WKX**



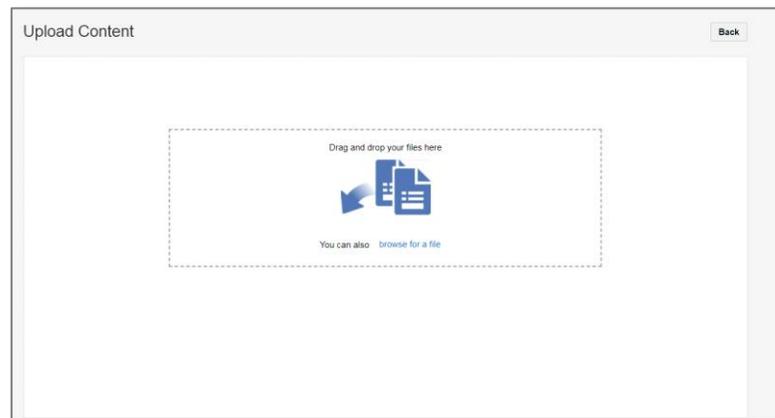
3. Hovering on the week's folder if it has already been created, a grey arrow will appear. Click on the blue arrow and select “Create New Folder” to create the email campaign content folder for that particular week.



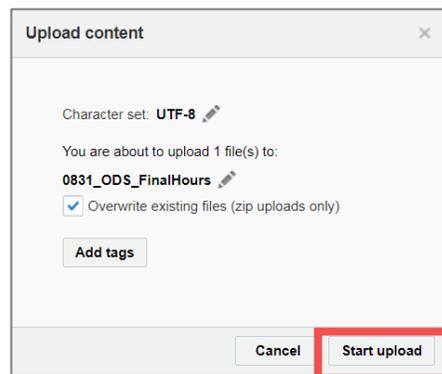
4. Type in the name of the folder you are creating with the naming convention:
MMDD_CampaignName
5. Once your folder is name, click the blue “Upload” button within your folder.



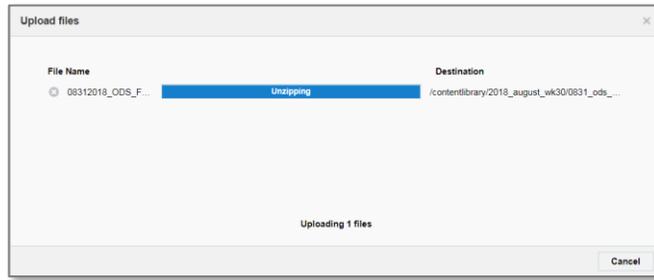
6. On the next page, drag and drop your created .zip folder from the server you just created for the campaign from the “Prepping the Body Creative Content” step onto the webpage.



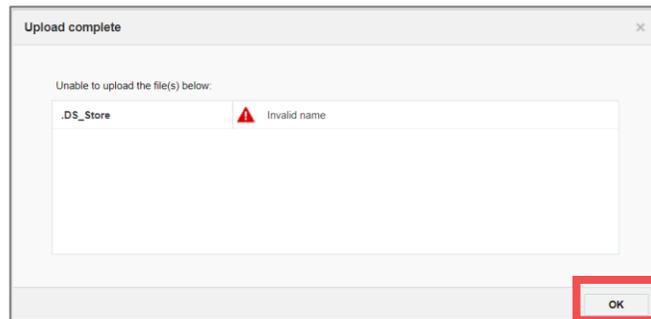
7. Checkmark “Overwrite existing files (zip uploads only)”. Click “Start upload”



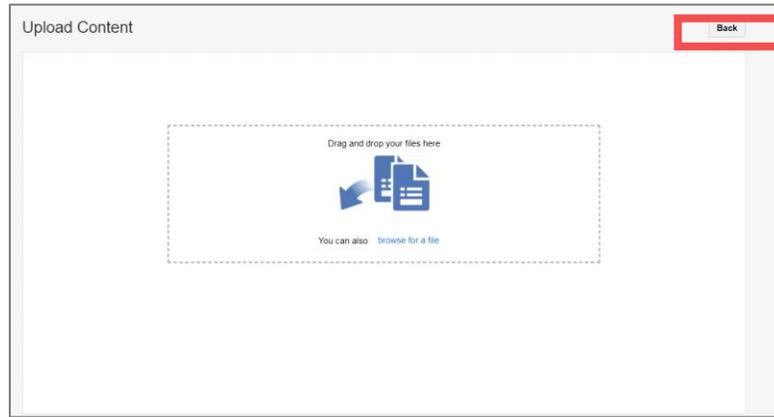
8. The files will begin to upload which can take a few seconds to a few minutes depending on the file sizes.



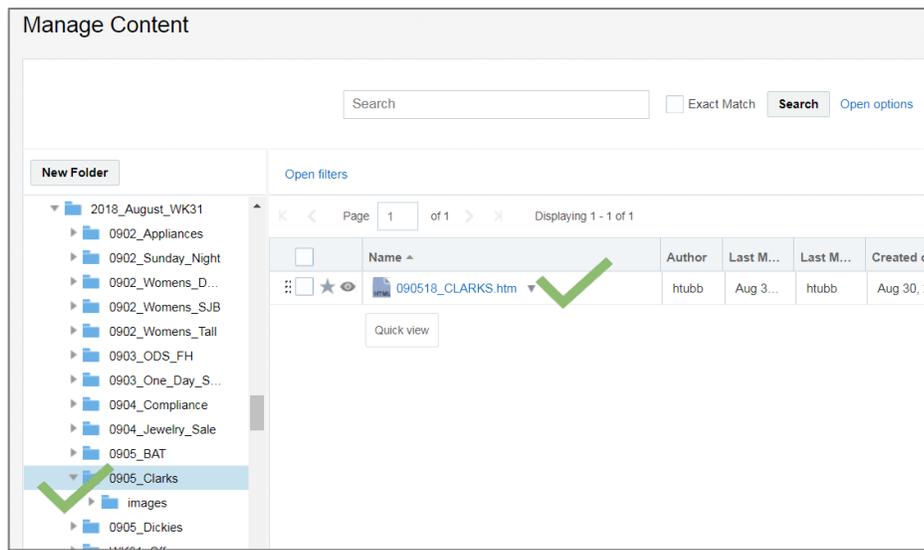
9. Once it is done uploading, you may receive an error message pictured. Rest assured, there was not an error. Click "OK"



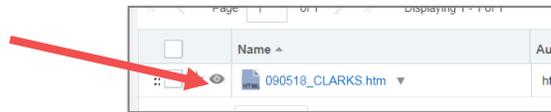
10. Next, click “Back”



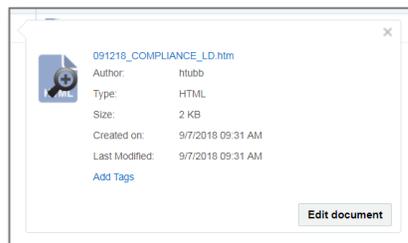
11. Check that your file was properly uploaded by making sure there is an .htm file within your email campaign content folder and an images subfolder.



12. Then, hover over the .htm file to see an “eyeball” icon.



a. Click on the eyeball, then hover over the “.htm” graphic until a magnifying glass with a “plus” symbol appears. Click on that symbol.



13. Here you'll be able to preview the body Creative Content of your email to ensure the correct assets were uploaded.



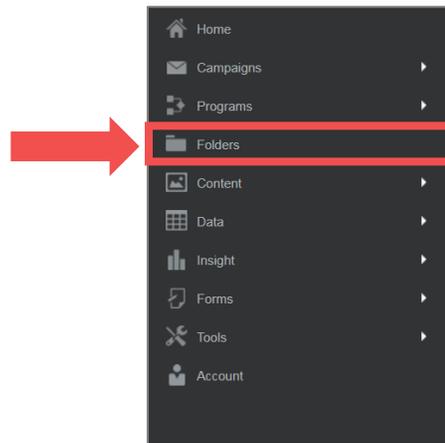
14. Now you have everything you need to build your campaign!

Copy Workbook

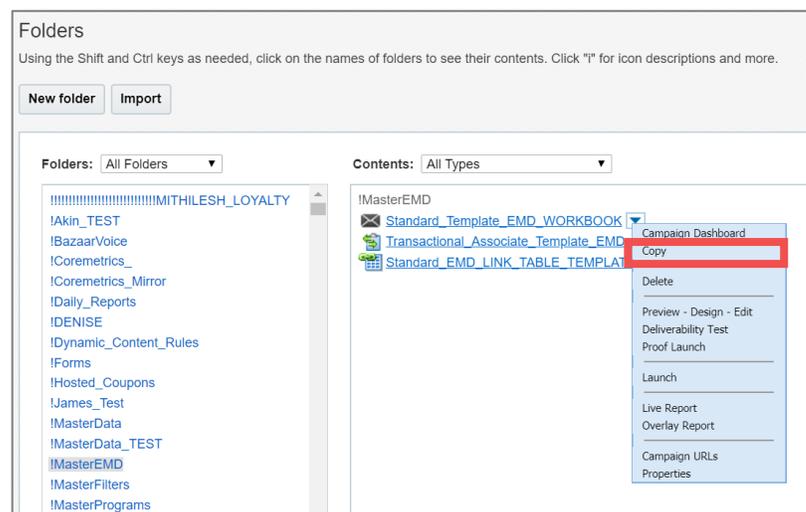
To speed up the process of creating emails, a Promotional Campaign Workbook template is created that houses evergreen Data Sources you'll need to build your Promotional Email Campaign..

**Note: Campaign Dashboard and Campaign Workbook nomenclature is used interchangeably in Responsys Interact. For the purposes of this Process Document, Campaign Workbook, or "Workbook," will be used.*

1. Once logged into Responsys, simply navigate to the left-hand sidebar and click Folders.



2. Once in Folders, select !MasterEMD
3. Find the Promotional Campaign titled "Standard_Template_EMD_WORKBOOK"
 - a. If you are doing an Associate Transactional email, you will copy "Transactional_Associate_Template_EMD_WORKBOOK" – the only difference between this workbook and the Standard is the Marketing Purpose (Standard = Promotional; Transactional = Transactional)
 - i. We use this workbook in order to send email campaigns to associates. Marking it as a "Transactional" email means that the audience (employees) cannot unsubscribe from the email – there is no unsubscribe link present.
4. Click the drop-down arrow on the righthand side. Then, "Copy"



- Rename the template to match the following convention:

YYYYMMDD_CampaignName

- Select the corresponding week's folder to house the campaign.
 - For this example:
 - The Campaign Name has been titled: 20180822_Clearance Swim
 - The Folder is 2018_AUGUST_WK29
- Click "Copy"

Standard_Template_EMD_WORKBOOK - Copy Campaign
This will create a new campaign that is an exact copy of the selected campaign.

Step 7 →

Enter a name for this new campaign:

Step 5 →
Campaign name cannot be more than 150 characters and can include only these characters:
A-Z a-z 0-9 space ! - = @ _ [] { }

Select the folder to hold this new campaign

Step 6 →

- In the new screen that displays, this is your Promotional Email Campaign's Workbook. This is where you will build and complete your email Campaign.

Campaign Workbook
20180822_Clearance Swim Validate Printable view

E-mail

Information

Created by: htubb
Date created: Mon, Aug 20 2018 at 06:46 CDT
Last modified by: htubb
Last modified: Mon, Aug 20 2018 at 07:20 CDT
Last valid on: Mon, Aug 20 2018 at 07:30 CDT
Campaign status: Draft

General settings

Description:
Purpose: Promotional
Marketing strategy: Promotional
Marketing program:
Folder: 2018_August_WK29

Message

From address: JCPenney@jcpenny.com
Reply to address: reply@jcpenny.com
Content:
Standard_JCP_HTML_template.htm
Subject line: Test SL
From name: JCPenney
Dynamic content: No
Link table: EMD_TEST_v3_linktable
External tracking: Enabled

Proof settings

Proof launch

[View live report](#)
[View monitoring](#)

Create the Campaign

On the Campaign Workbook, you will enter information into each section outlined below.

The screenshot shows the Campaign Workbook interface for a campaign named '20180822_Clearance Swim'. The interface is divided into several sections, each with a callout box explaining its purpose:

- E-mail:** Build the campaign using the visual assets, Subject Line, Message settings, and assigning the Link Table.
- Information:** Cannot be edited. Ingrained information about when the Campaign Workbook was created.
- Message:** The same information is filled out in the E-mail step. Do not edit here.
- General settings:** Set-up categorization of the campaign for Reporting purposes.
- Data sources:** Associate the data with your email in order to make sure it gets to the correct people and displays the correct content.
- Campaign settings:** Set-up campaign tracking criteria for execution and reporting purposes.
- Testing and analysis:** This section will highlight if you're performing a Multivariate Test.
- Launch settings:** Prepare your Campaign to launch.
- Audience / Targeting:** Define the audience list and any inclusions and exclusions for the campaign, which includes Filters.
- Program (if needed):** Directly set-up a Program for your campaign from the Workbook if needed.
- Proof settings:** Test your campaign before you're ready to send to the masses.

2. E-mail
Build the campaign using the visual assets, Subject Line, Message settings, and assigning the Link Table.

Information
Cannot be edited.
Ingrained information about when the Campaign Workbook was created.

Message
The same information is filled out in the E-mail step.
Do not edit here.

1. General settings
Set-up categorization of the campaign for Reporting purposes

6. Proof settings
Test your campaign before you're ready to send to the masses

3. Data Sources
Associate the data with your email in order to make sure it gets to the correct people and displays the correct content

4. Campaign settings
Set-up campaign tracking criteria for execution and reporting purposes.

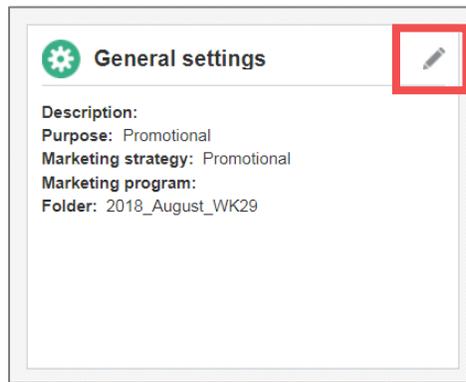
This section will highlight if you're performing a Multivariate Test.

7. Launch settings
Prepare your Campaign to launch

5. Audience / Targeting
Define the audience list and any inclusions and exclusions for the campaign, which includes Filters.

8. Program (if needed)
Directly set-up a Program for your campaign from the Workbook if needed.

Step 1 - General settings



1. Located in the top right-hand corner of the Campaign Workbook. Click on the edit pencil icon highlighted above.
2. On the pop-up window, ensure that the **Name** is entered according to the naming convention outlined in the “Copy Workbook” step. (YYMMDD_CampaignName).
3. Enter in a brief **Description** about the campaign, including if there is a test (subject line, creative, etc.) or if it is an STO or STO_BO campaign.
4. **Purpose** will always be “Promotional” and cannot be edited from the Workbook.
 - a. If you copied the Transactional_Associate_Template_EMD_WORKBOOK it will be “Transactional”
5. **Marketing Strategy:** Select “Promotional” (most Standard Campaigns are Promotional)
 - a. If the campaign is a Trigger, you will select “Trigger”
6. **Marketing Program** – this is the type of content within the email as it relates to the product Division or business objective. This will be outlined in the Weekly Assignment Sheet. Select the corresponding option.
7. Ensure the **Folder** selection is correct for the corresponding Campaign Week chosen in the “Copy Workbook” step.
8. Click “Save”

Edit general settings

Step 1.2 Name: 20180822_Clearance Swim Required

Step 1.3 Description: Single image graphic. No test

Step 1.4 Purpose: Promotional

Step 1.5 Marketing Strategy: Promotional

Step 1.6 Marketing Program: Enterprise XDiv Graphic

Step 1.7 Folder: 2018_August_WK29 Required

Cancel Save Step 1.8

Step 2 - E-mail

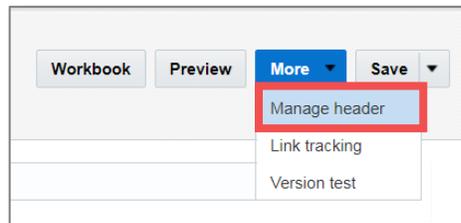


1. Located in the top left-hand corner of the Campaign Workbook. Click on the edit pencil icon highlighted above. You'll be taken to a new screen.
2. On the new screen, you'll need to choose your HTML template for your campaign by clicking "Change"

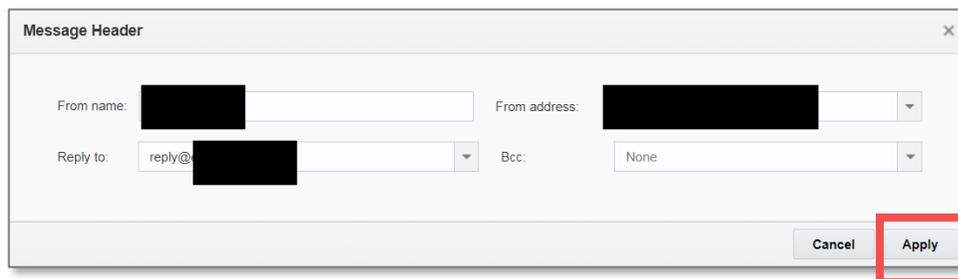
- a. As of 10/24/18, there are 6 templates available:
3. Enter in your Subject Line in the text field “Subject”



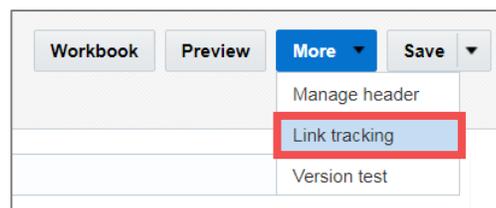
- a. If you are using a First Name personalization field, testing Subject Lines or using Dynamic Subject Lines, see directions in the Appendix of this document.
4. Next, in the upper right-hand corner, click “More” then “Manage Header” to set up your From Name, From Address, and Reply to fields



- a. See [Z:\Planning and Promotions\EMAIL - Execution Documents\Process and Training Documents\Process docs\Friendly From lists.xlsx](#) on which fields you need.
 - i. If you are using Dynamic From Name (aka Dynamic Friendly From), see directions in the Appendix of this document.
- b. For this Example:
 - i. From Name: Company
 - 1. Also known as Friendly From
 - ii. From address: Company@e.Company.com
 - iii. Reply to: reply@e.Company.com
 - iv. Bcc: None (**ALWAYS SET TO NONE**)
- c. Click “Apply”

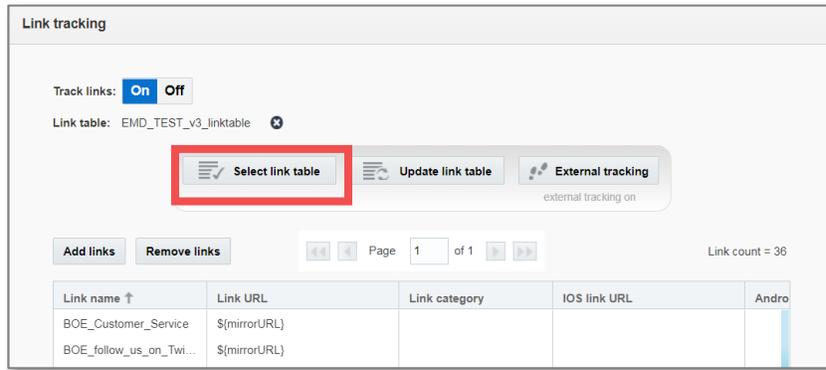


5. Next, in the upper right-hand corner, click “More” then “Link Tracking” to set your links for your email.

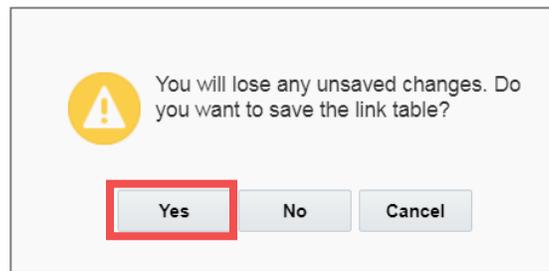


- a. On the pop-up window, make sure “Track Links” is toggled to “On”

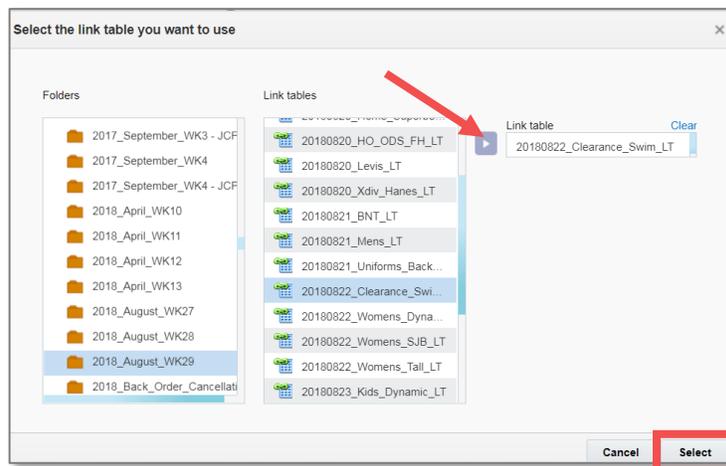
b. Then, “Select link table”



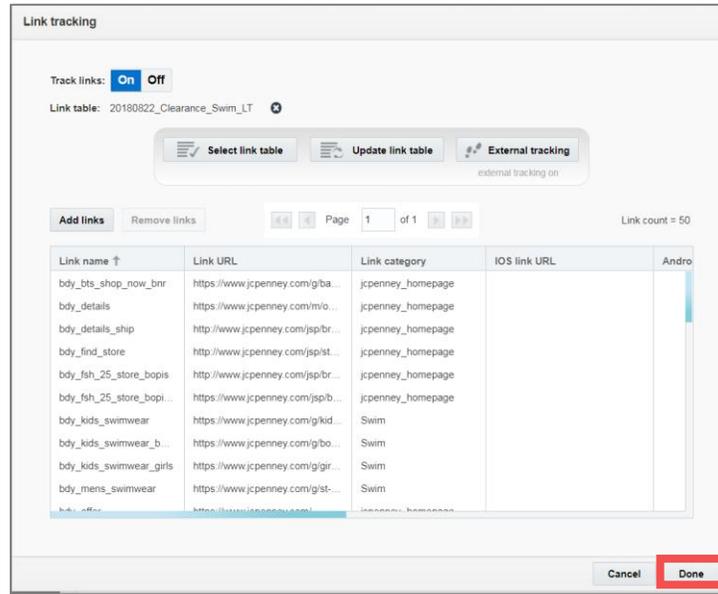
c. You may receive a Warning Window, select “Yes”



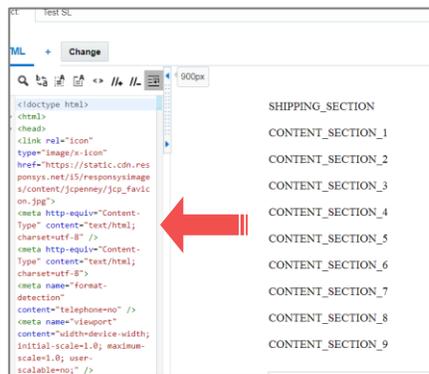
d. Navigate to your Week’s Folder where you saved the Link Table you uploaded in the “Importing Your Campaign Assets” step. Toggle the Link Table tile over using the arrow. Then, Click “Select”.



e. Then, Click “Done.”

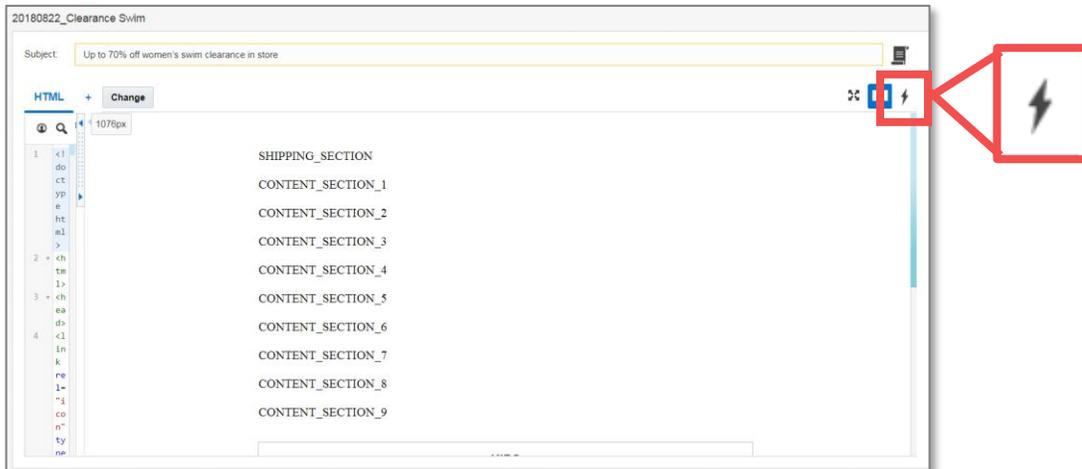


6. Drag the Source Code window to the left to minimize so you can have enough space to work.

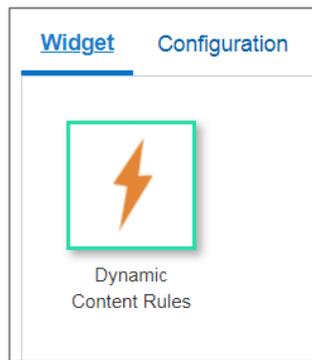


7. You do not need to populate the Header and Footer for the EMD; meaning, you will not need to select any content for these sections. (Footer includes the Bottom Navigation and Social Media Icons (e.g. KIDS>SHOES>JEWELRY>etc.). This content is pulled in through the from the campaign template that you chose in Step 2.2

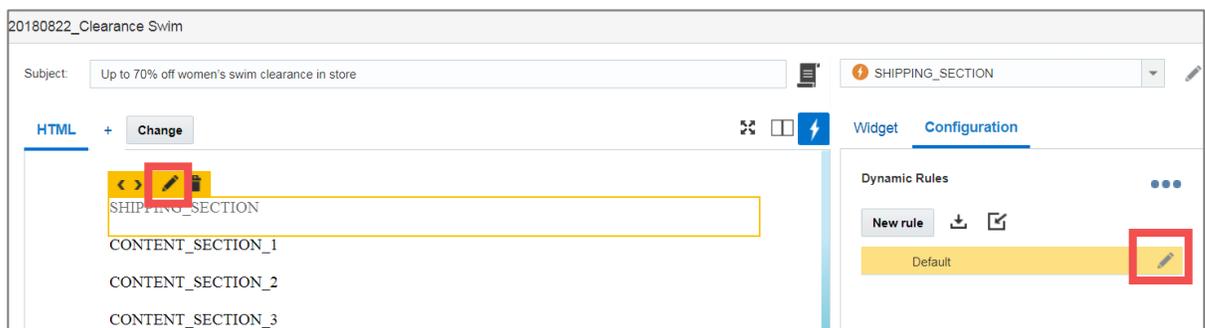
8. Next, click the Lightning Bolt icon on the right-hand side.



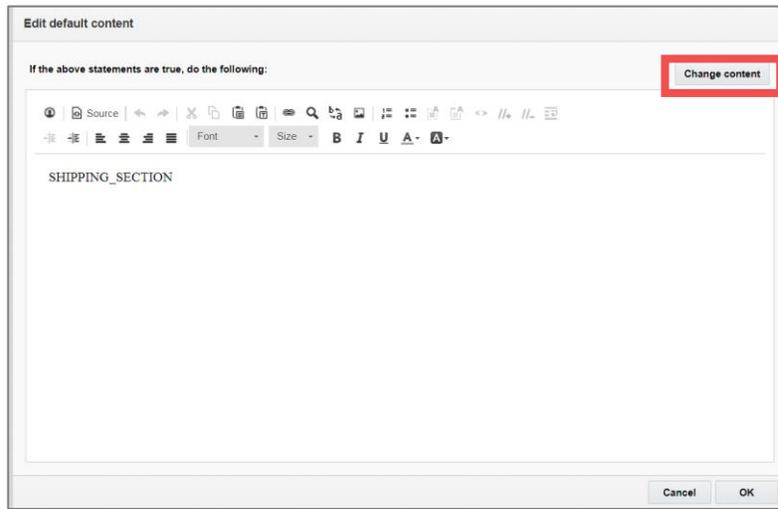
9. Drag the "Dynamic Content Rules" over the Shipping_Section.



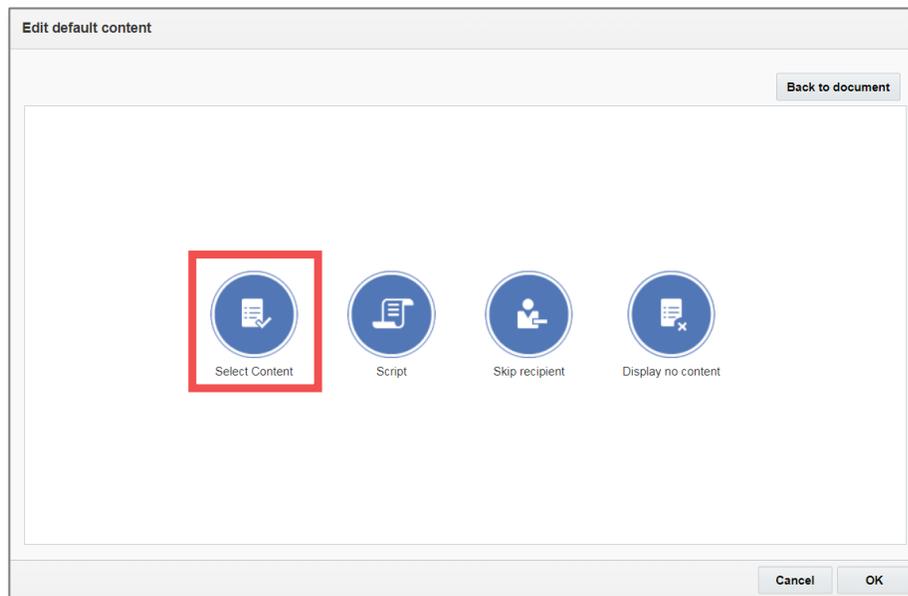
10. Above the "Shipping_Section" OR next to the Default Rule, select the edit pencil icon.



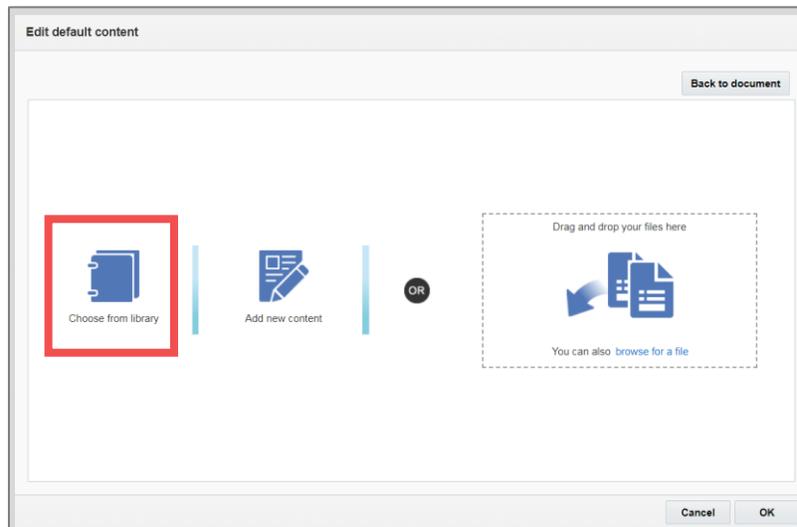
11. Select “Change content” on the pop-up window. Here is where you will define which Shipping Banner you need in your email.



12. Then, click “Select Content”.
 - a. If you don’t need a Shipping Banner for your email, you would simply select “Display no content”

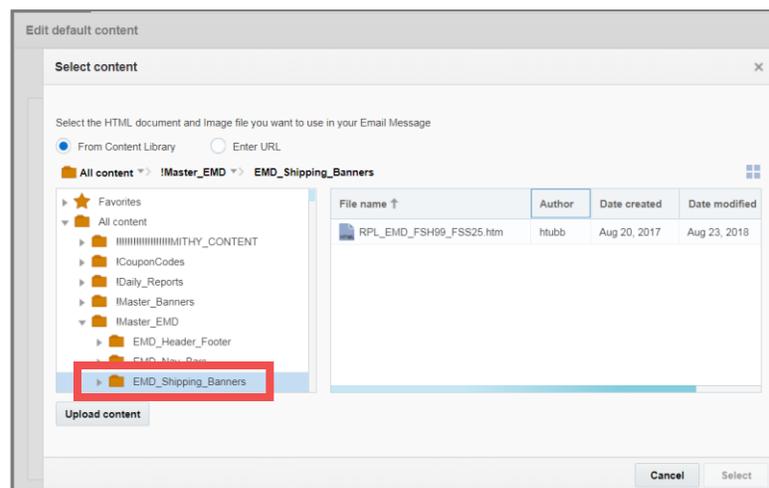


13. Next, select “Choose from Library.”



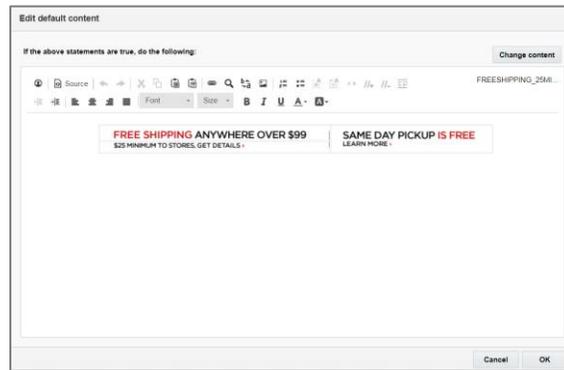
14. Here is where you will navigate to:

- a. All content>>
- b. !Master_EMD>>
- c. EMD_Shipping_Banners>>
 - i. Select the appropriate Shipping Banner for your email as outlined in the Weekly Assignment Sheet.



- d. Click “Select”

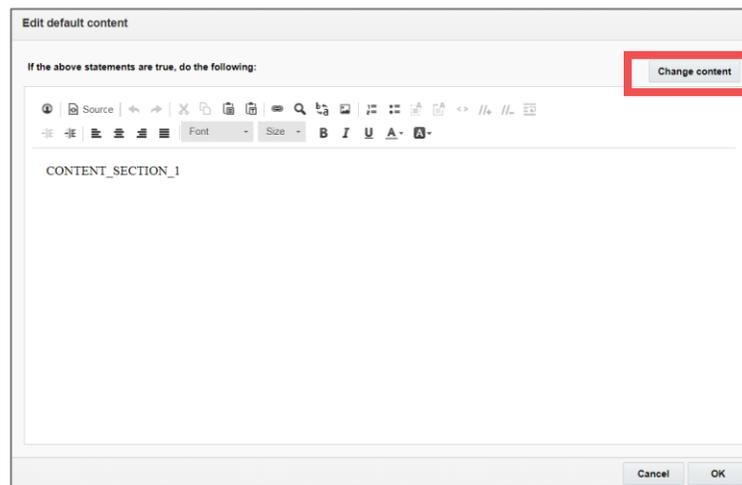
15. Your content will display so you can visually see what you clicked on. If you clicked the incorrect asset, simply click “Change content” again to select the correct asset. Once you’re done, click “OK”



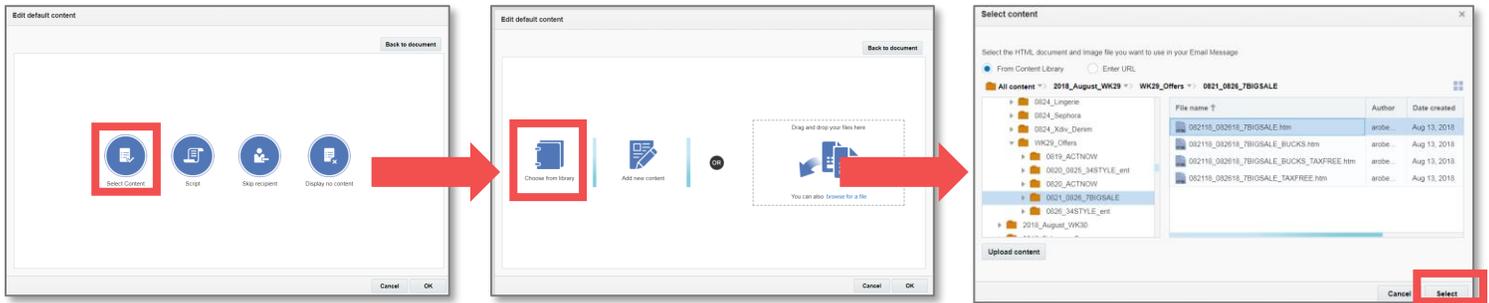
On the Email Message Designer (EMD) window, remember to hit “Save” in the upper right-hand corner periodically to save your work.



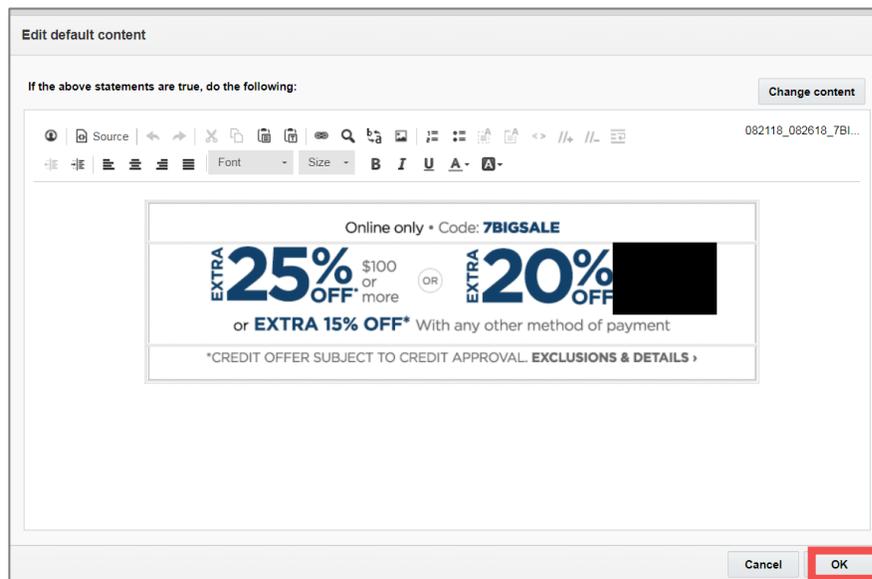
16. Then, click the next section you want to work on.
17. Again, drag the “Dynamic Content Rules” over the section you’re working on.
18. Just like you did above for the Shipping_Section, select your default image by choosing the edit pencil icon either on the content block or the Dynamic Rules right-sidebar
19. Select “Change content” on the pop-up window. Here is where you will define the next piece of content in your email. Typically, this content placement will be the Offer Banner.



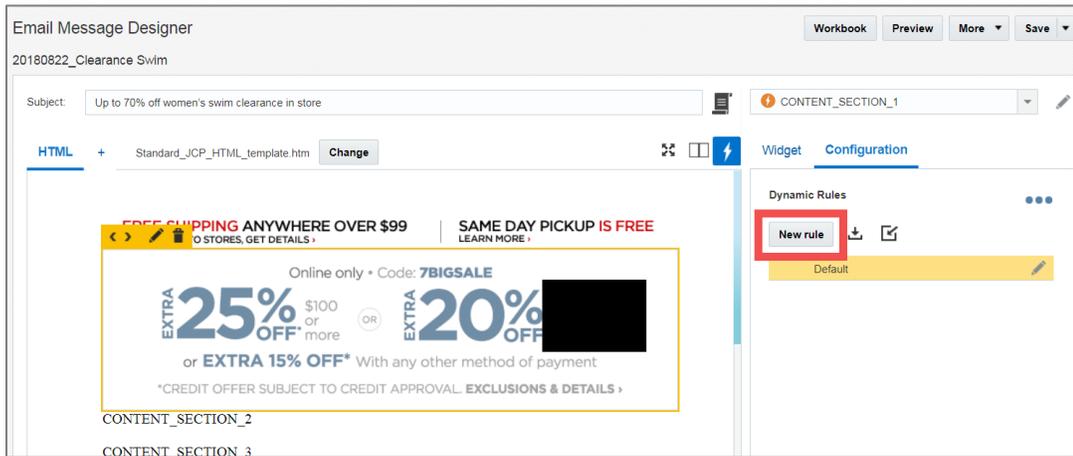
20. Repeat the steps like you did above: 1) Select Content 2) Choose from Library 3) Navigate to the corresponding folder where you need to find your content.
 - a. In this example, we're choosing the default Offer.
21. Then, click "Select"



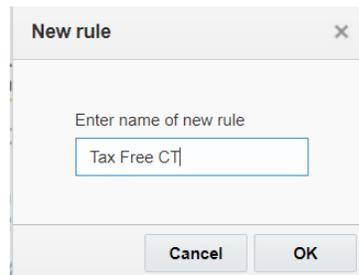
22. Your content will display so you can visually see what you clicked on. If you clicked the incorrect asset, simply click "Change content" again to select the correct asset. Once you're done, click "OK"



23. If your content section needs a content rule, simply set up your default first, and then within the same section, click “New Rule”.
 - a. For this particular example, I need a Dynamic Content Rule because the Offer banner is dynamic because some Customers will have a Tax-Free Banner as defined in the Weekly Assignment Sheet.

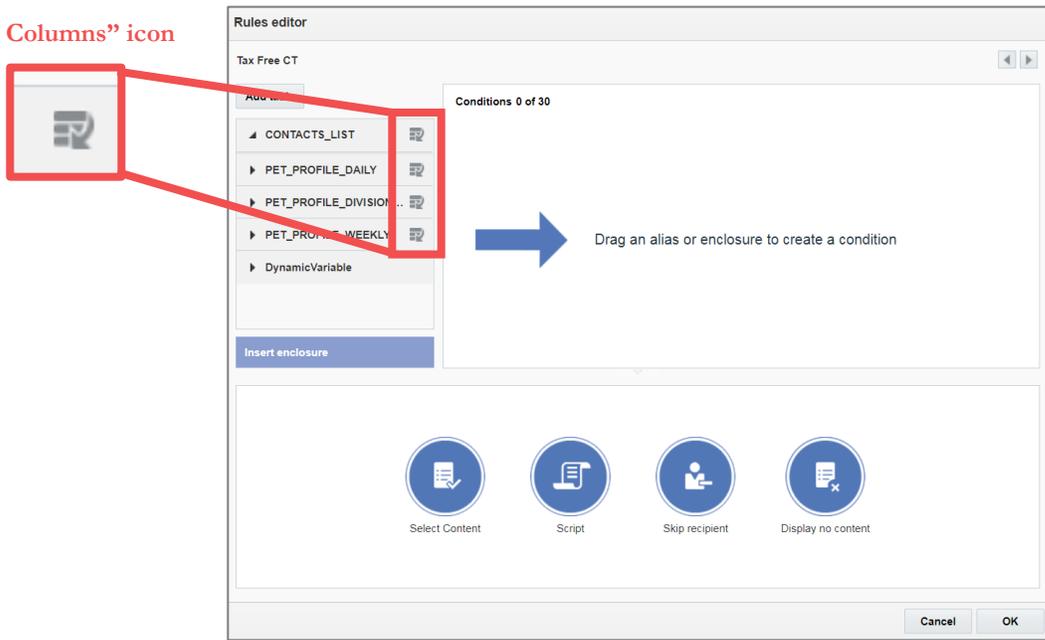


24. Name your rule something you can easily identify. Then click “OK”
 - a. *This field does not allow special characters.*
 - b. For this example, I’m naming the rule “Tax Free CT” because I need the content that displays the Offer with a tax-free banner attached to it for the State Connecticut.



25. Next, define the rule(s) in the Rule Editor. In this window, you'll see a few Data Tables on the left-hand side. These are part of your Workbook Template of variables needed to send the campaign (i.e. First Name, Loyalty Cert Balance, DIV Rank, etc.).
 - a. For Dynamic Rules for Content Sections of your email, you could potentially use these variables depending on what you need. Just expand the arrow on the left to see what's already associated with the email campaign.
 - b. If you need something that is housed in the Data Table listed on the left-hand side, but it is not listed in the dropdown, just select the "Add columns" icon to the right of the Data Table you need information from. And then select the variable you need.

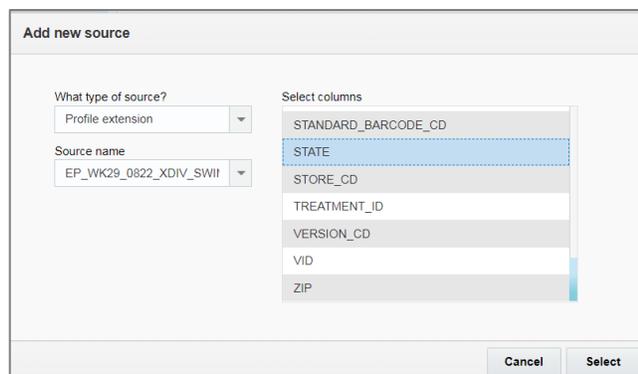
"Add Columns" icon



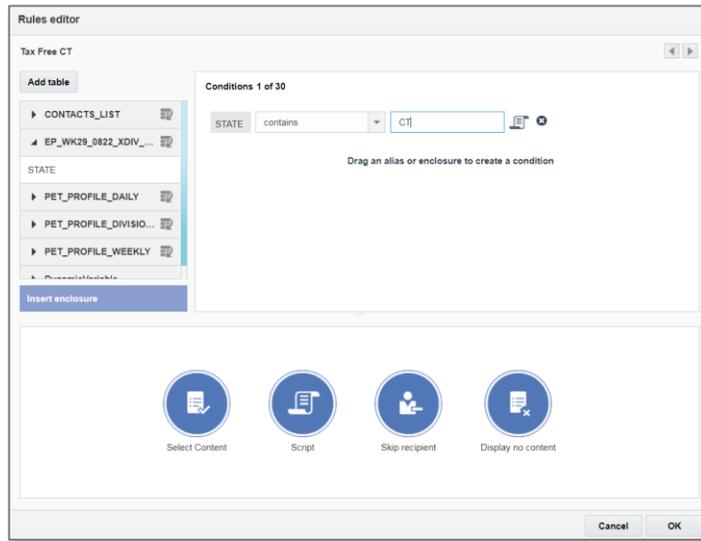
- c. However, if you need information from a Data Table that is NOT listed on the lefthand side. You'll need to click "Add Table"



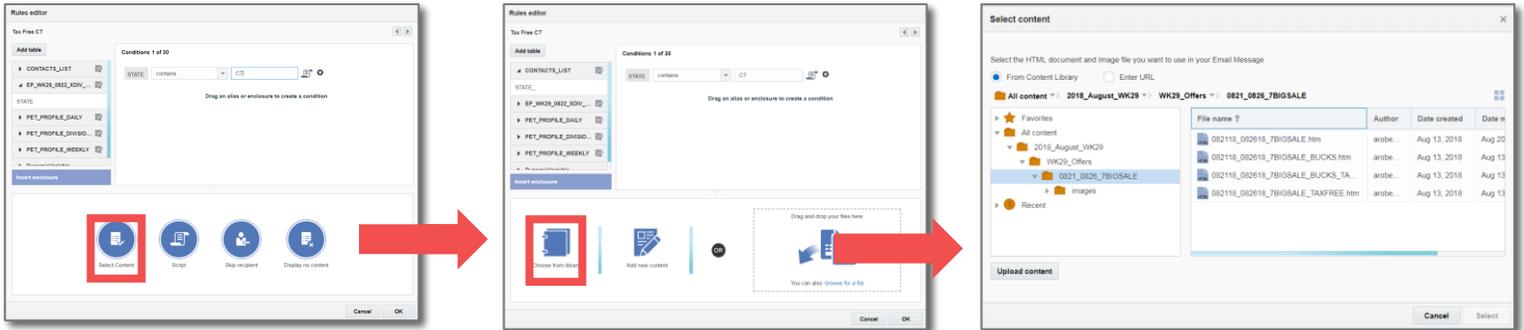
- i. For this example, I need the Profile Extension Table uploaded by the Selection Team and the variable (aka column) STATE to identify the state CT as instructed by the Weekly Assignment Sheet for this particular Offer. Highlight it blue, then hit "Select."



- ii. Then, you'll drag and drop the variable you just identified over into the Condition space. Define the rule as needed.

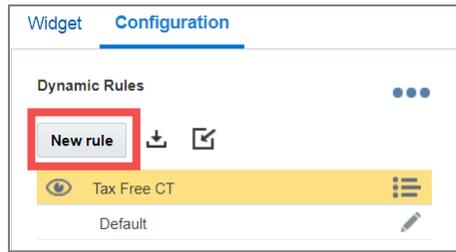


26. After you've defined your rule, you need to define the content that corresponds with that rule.
 - a. Select Content>>
 - b. Choose from Library>>
 - c. Choose your content>> Select
 - d. Preview your content in the window. Select "OK"



27. Because of the EMD Tool Structure by Responsys, if you have a dynamic content rule set up, you will also need to define content for NULL values.

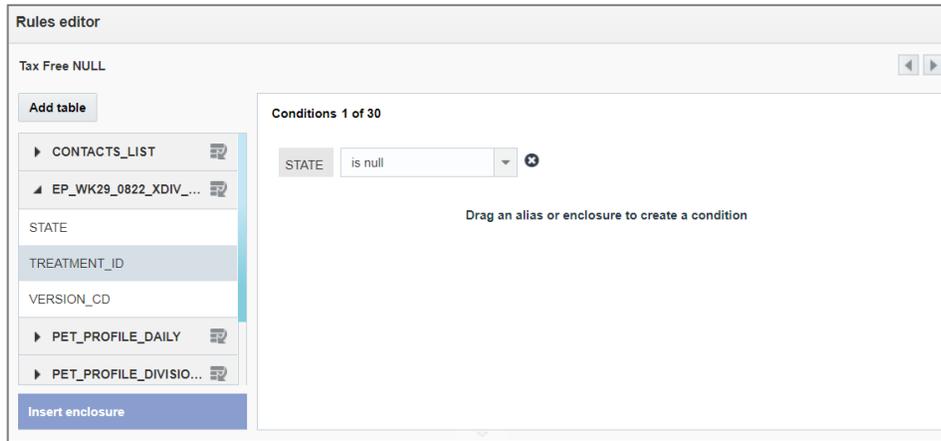
a. To do this, you'll simply add another "New Rule" within the same content piece.



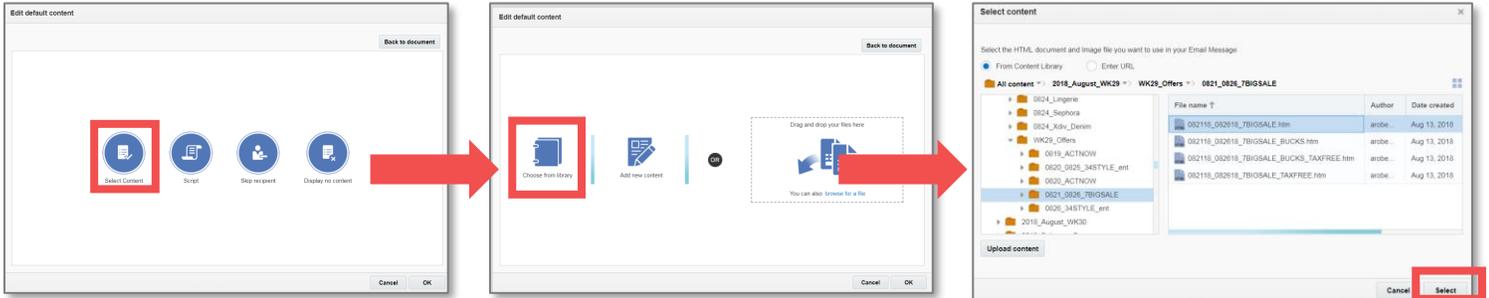
b. Type in a descriptive text with NULL at the end "Tax Free NULL". Click "OK"



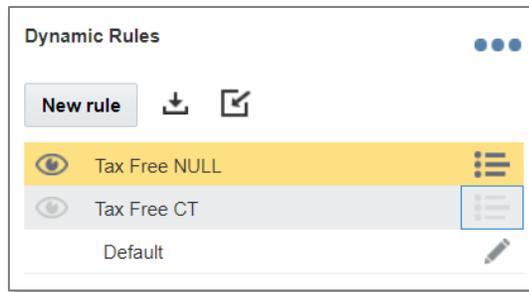
c. Enter in the same rule you defined for the Dynamic Content Rule previously except set it to "is null".
i. In this example, I'm choosing the !Unica PET for my campaign. Dragging the STATE variable over and setting it to "is null".



- d. After you've defined your NULL rule, you need to make sure you have the same content as your DEFAULT you already set up.
 - i. Select Content>>
 - ii. Choose from Library>>
 - iii. Choose your DEAFULT content>> Select
 - iv. Preview your content in the window. Select "OK"



- e. After you have your rules, make sure the order is as follows:
 - i. Dynamic Rule NULL
 - ii. Dynamic Rule(s)
 - iii. Default

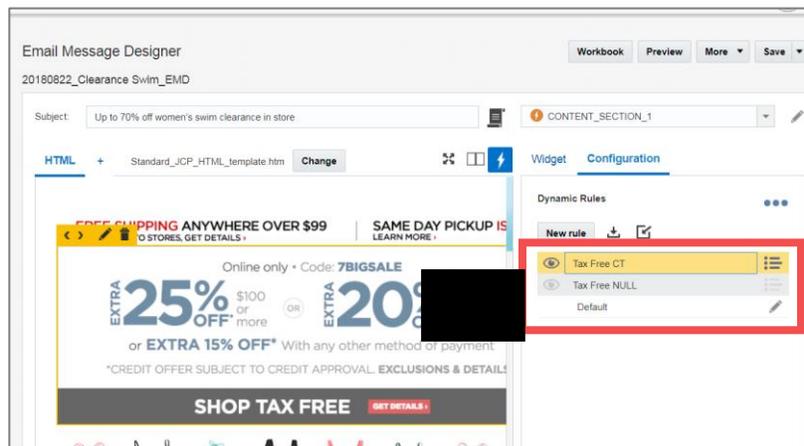


- f. You can drag the rules to move them up or down. This defines the hierarchy order in which the data will run information to show the corresponding content piece.

Think of it like this for the example...

- Tax Free NULL Rule is for consumer data where we don't have a STATE attribute for them (aka null)
 - So we want to show the offer without the tax free banner since we don't know if they are in the state of CT
- Tax Free CT Rule is for just the STATE of CT
 - So we want to show the offer WITH the tax free banner
- Default Rule is for any other STATE that is not CT (*does not cover null values*)
 - So we want to show the offer without the tax free banner

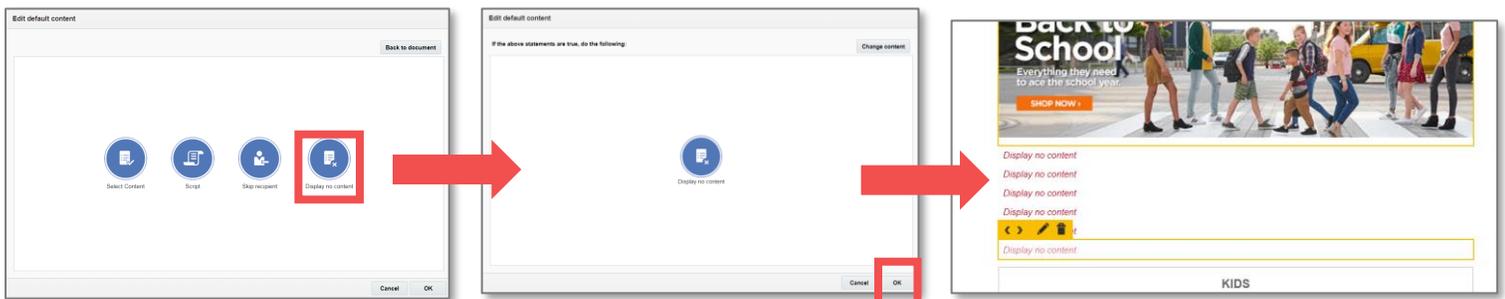
28. You can now toggle back and forth within the Content_Section_1 between the Default, NULL, and your Dynamic Content Rules to ensure you have what you need.



29. You'll repeat **Steps 16 – 28** for the rest of your email filling in the necessary Body and Banners and any Dynamic Content Message Rules you need.

Remember to first drag the Dynamic Content Rules lightning bolt over each section you begin working on.

30. If you have a Content Section where **you don't need any content**. You'll drag the Dynamic Content Rules lightning bolt over the section.
- a. Select the edit pencil icon>>
 - b. Change Content>>
 - c. **Display no content**>>
 - d. Click "OK"



31. This will display "Display no content" in the body preview of your email. When you send a proof and live launch your email, content will not display here.
- a. **YOU MUST** set the content section to "display no content" in order for this to occur. If you do not, the "Content_Section_#" will show in your proof and live launch.
32. Click "Save", then "Workbook" to continue Creating your Campaign



Step 3 - Data Sources

Data sources	
Profile data	Dynamic variables
CONTACTS_LIST	UNSUB
PET_PROFILE_DAILY	LinkId
PET_PROFILE_WEEKLY	DISCLAIMER
PET_PROFILE_DIVISION_SALES	FOOTER
EP_WK29_0822_XDIV_SWIM_52147_20180822_110...	PreHeader

1. Located in the halfway middle point of the Campaign Workbook. Click on the edit pencil icon highlighted above. A pop-up window will appear.
2. Any changed in your make in this window – remember to hit “Save” in the bottom right-hand corner of the pop-up window.
3. There are 5 types of data sources you can add to your campaign:

a. **Profile list** – this is your “master” list of consumers we have email addresses for. No icon.

b. **Profile extension** – this defines information about consumers that you need to populate for your email campaign in data tables. The information is used to cull down the Profile list into just the consumers you need to send the email to (aka your audience). Information is either housed in Responsys or imported from the Selection Team.



c. **Supplemental data** – can be one of four things:

i. **Supplemental tables** – extra pieces of information about consumers housed in its own table independent of Profile extension or Profile list information (**Most likely won't use for campaigns**)



ii. **Supplemental filter** – logic to narrow a dataset from a supplemental table. *Not the same as a Profile Extension Filter* (**Most likely won't use for campaigns**)



iii. **SQL view** – can either apply Structured Query Language (SQL) statements to internal data sources for tracking purposes -OR- serve as a lookup to pull information between two data sources on the fly.



1. *Example: Denoting an Optical Flag for a consumer in the Service_Flags SQL Join you set up before building you campaign*

iv. **Join tables** - combines information from two or more data sources into a new data table to provide an extra data point unique to a campaign/dynamic content rule -OR- after a Profile Extension table has already been created and information may accidentally been left off. Also known as a “Supplemental Join”.



1. *Example: After the !Unica PET was pulled by the Selection Team for a particular campaign, a banner was added to the creative for Extended Hours at a store. Since this information was added later, we needed to create a Supplemental Join to attribute this information to the campaign.*

d. **Segment group** – divides a Profile list into groupings based on customer-specific segmentation conditions or rules. (**will not use this for campaigns**)



e. **Dynamic variable** – these items are not dependent on a table. They are directed based on what you enter in as the default, set rules for, or have coded as RPL. No icon.

The icon that displays next to the name of the data source you're choosing from the Folders

Profile list

Profile list should always be set to “CONTACTS_LIST”. The “CONTACTS_LIST” is your “master” list of all Company consumers we have email addresses for.

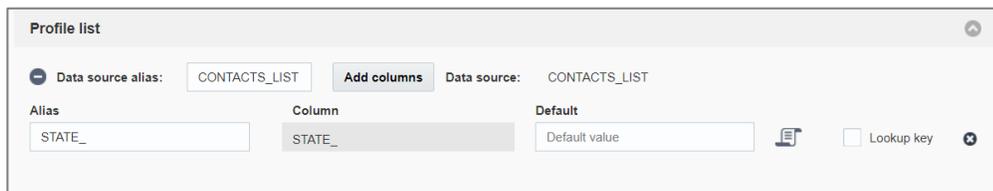


The screenshot shows a configuration window titled "Profile list". It features a minus sign icon on the left. The "Data source alias:" field contains the text "CONTACTS_LIST". To its right is a button labeled "Add columns". Further right, the "Data source:" field also contains the text "CONTACTS_LIST".

If you used aliases (aka variables or columns) to denote dynamic content while building your email from the Profile list from the CONTACTS_LIST, this will be displayed here.

Example:

If you used “STATE_” for a Dynamic Rule during the E-mail set-up, you would see it displayed here.



The screenshot shows the "Profile list" configuration window with an expanded table. The table has three columns: "Alias", "Column", and "Default". The "Alias" field contains the text "STATE_". The "Column" field also contains "STATE_". The "Default" field contains "Default value". To the right of the table are a printer icon, a checkbox labeled "Lookup key", and a plus sign icon.

Profile extensions

Profile extensions are attributes to the campaign in a data table. This is defining information about consumers that you need to populate for your email campaign. Also known as Profile Extension Table or PET.

PETs inherent to the Workbook

You should always have the following data sources and aliases (aka variables or columns) associated to your Workbook. These items are “evergreen” to display personalized information for the consumer’s email Header.

Data source alias	Column	Default	Lookup key
PET_PROFILE_D/	FIRST_NAME	Default value	<input type="checkbox"/>
	LAST_NAME	Default value	<input type="checkbox"/>
	LOYALTY_CERT_BALANCE	Default value (numeric)	<input type="checkbox"/>
	REWARD_MEMBER_FLG	Default value	<input type="checkbox"/>

Data source alias	Column	Default	Lookup key
PET_PROFILE_DI	DIV_AMT_RANK_1	Default value (numeric)	<input type="checkbox"/>

Data source alias	Column	Default	Lookup key
PET_PROFILE_W	CARD_TIER_CD	Default value	<input type="checkbox"/>

This is what will appear when instructed “leave blank, a greyed out “Default value” text will appear”

*same as setting to \$nothing() in the Classic version of ResponSys

Default

Default value

a. Data source: PET_PROFILE_DAILY

i. Aliases

- FIRST_NAME | Default = *leave blank, a greyed out “Default value” text will appear*
 - This insert’s the consumer’s first name into the Header if applicable.
- LAST_NAME | Default = *leave blank, a greyed out “Default value” text will appear*
 - This insert’s the consumer’s last name into the Header if applicable.
- LOYALTY_CERT_BALANCE | Default = *leave blank, a greyed out “Default value” text will appear*
 - This insert’s the consumer’s Company Reward Balance Points into the Header if applicable.
- REWARD_MEMBER_FL | Default = *leave blank, a greyed out “Default value” text will appear*
 - This denotes if the consumer is a Company Rewards Member. This effects which Header will display in the consumer’s email.

b. Data source: PET_PROFILE_DIVISION_SALES

i. Alias

- DIV_AMT_RANK_1 | Default = *leave blank, a greyed out “Default value” text will appear*
 - This denotes the product division the consumer shops the most. This effects which Top Navigation will display in the consumer’s email.

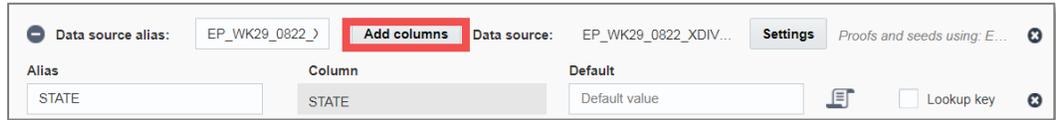
c. Data source: PET_PROFILE WEEKLY

i. Alias

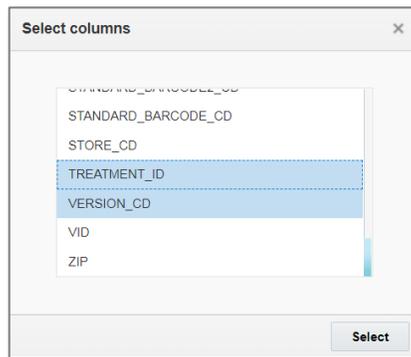
- CARD_TIER_CD | Default = *leave blank, a greyed out “Default value” text will appear*
 - This denotes if the consumer is a Company Credit Cardholder and which tier they are: Regular/Red (R), Gold (G), or Platinum (P). This effects what will display in the Header if applicable.

Add PET if using !UnicaCutList data source

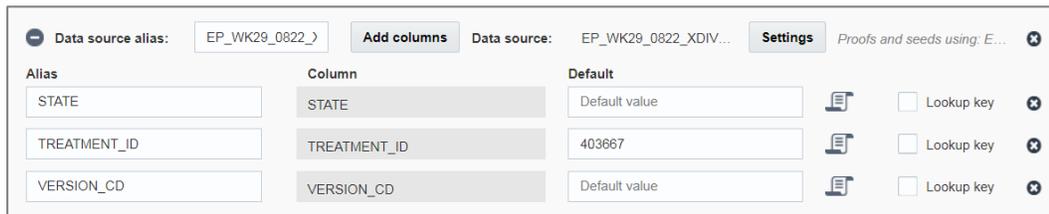
1. If you used aliases (aka as variables or columns) from the campaign's !UnicaCutList Profile Extension Tables (PET) to denote dynamic content while building your email, these will be listed here.
 - a. You will need to add the following aliases to your campaign for tracking and reporting purposes any time you use the !UnicaCutLists PET for your campaign.
 - i. Click "Add columns" next to your data source that's already defined.



- ii. Select TREATMENT_ID and VERSION_CD from the list so that they are highlighted blue (you can key CTRL+ to select multiple aliases at the same time).
 1. Hit "Select".



- b. Now you'll see anything you defined as dynamic content earlier when you built your email (for this example STATE) AND the aliases you need for tracking and reporting purposes (TREATMENT_ID and VERSION_CD).

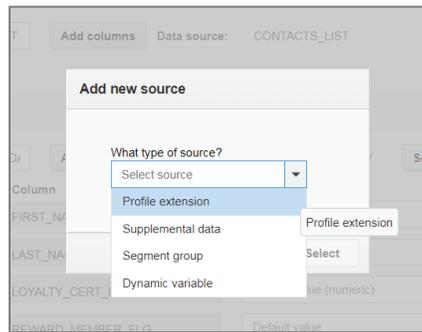


- i. Set the alias to:
 1. TREATMENT_ID | Default = 6 digit number found in your !Unica PET file.
 - a. Reference your CampaignName_Builder_QA_Checklist to enter in this number.
 2. VERSION_CD | Default = leave blank, a greyed out "Default value" text will appear

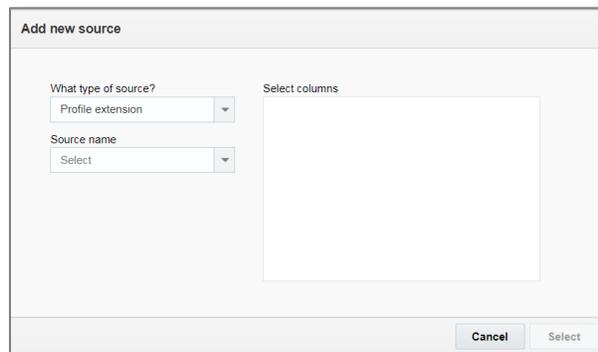
2. If you **DID NOT** use aliases (aka as variables or columns) from the campaign's !UnicaCutList Profile Extension Tables (PET) to denote dynamic content while building your email, you will need to add your !UnicaCutLists PET to your campaign with the following aliases.
 - a. To add a data source, click "Add new source" within the "Data Sources" window (upper left-hand corner of the pop-up window).



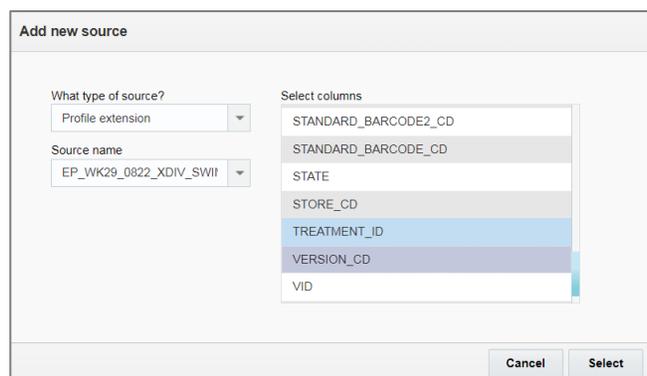
- b. Select "Profile extension" from the dropdown menu.



- c. Select your !UnicaCutList PET (ex. *EP_WKXX_MMDD_CampaignName_XXXX*)



- d. Then CTRL+ TREATMENT_ID and VERSION_CD so that they are highlighted blue.
 - i. Hit "Select".



- e. Now you'll see the aliases you need for tracking and reporting purposes (TREATMENT_ID and VERSION_CD).

Alias	Column	Default		
TREATMENT_ID	TREATMENT_ID	403677		<input type="checkbox"/> Lookup key
VERSION_CD	VERSION_CD	Default value		<input type="checkbox"/> Lookup key

- i. Set the alias to:
1. TREATMENT_ID | Default = 6 digit number found in your !Unica PET file.
 - a. Reference your *CampaignName_Builder_QA_Checklist* to enter in this number.
 2. VERSION_CD | Default = *leave blank, a greyed out "Default value" text will appear*

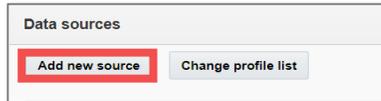
If your campaign is using Metadata as defined in the Weekly Assignment Sheet, you will not include a PET. But you WILL NEED to add the Treatment_ID to your Dynamic Variables. See instructions on the following pages.

Supplemental Data

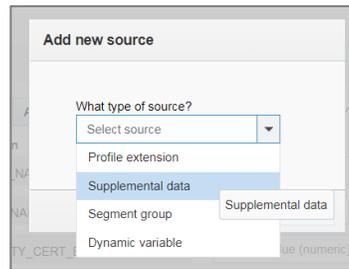
The most common types of Supplemental data as a data source are the SQL view and Join table.

SQL view

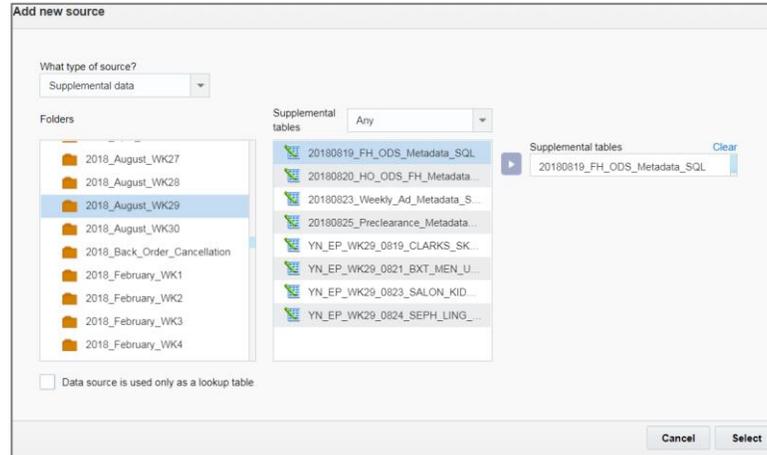
1. You'll need to add a Supplemental data SQL view to your Data sources if you're combining tables on the fly (this is very rare). To do this:
 - a. To add a data source, click "Add new source" within the "Data Sources" window (upper left-hand corner of the pop-up window).



- b. Select "Supplemental data" from the dropdown



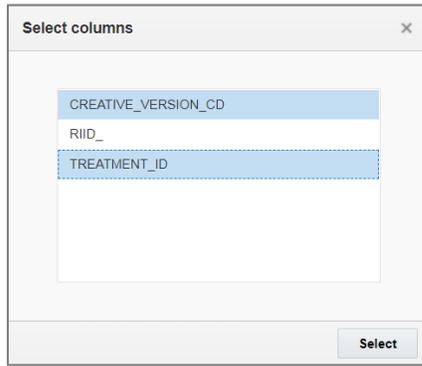
- c. Navigate to the folder where you saved your SQL statement. Toggle the SQL view over using the arrow.
 - i. Then, Click "Select".



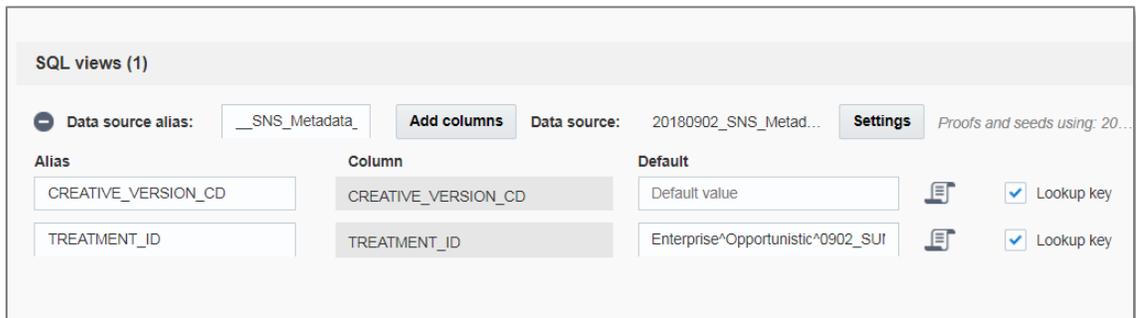
- d. From here, you'll scroll down in the "Data source" pop-up window to find your newly selected SQL view. Click "Add columns".



- e. Then CTRL+ the columns you need for your campaign so that they are highlighted blue.
 - i. Hit “Select”

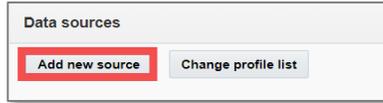


- f. Checkmark the “Lookup key” beside the alias’ default – this will reference these particular SQL aliases when you Proof and Launch your campaign.

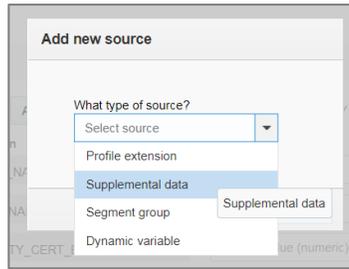


Join table

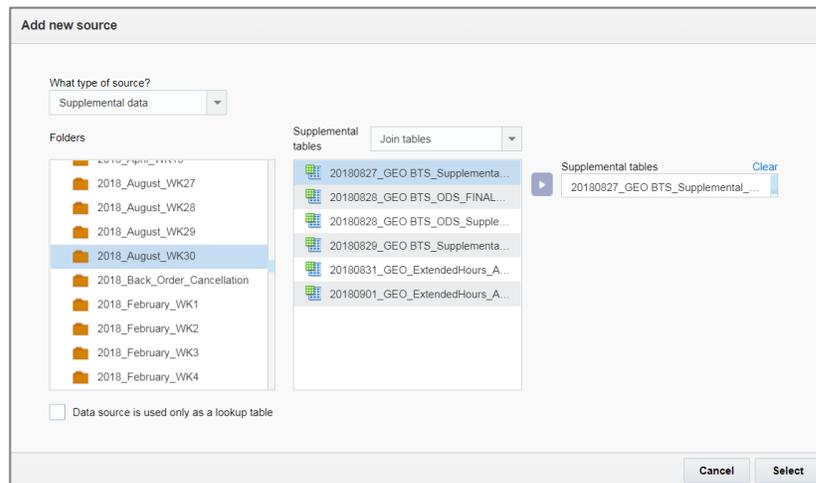
1. If your campaign needs a Supplemental Join as defined in the Weekly Assignment Sheet, you'll follow these steps.
 - a. Click "Add new source" within the "Data Sources" window (upper left-hand corner of the pop-up window).



- b. Select "Supplemental data" from the dropdown



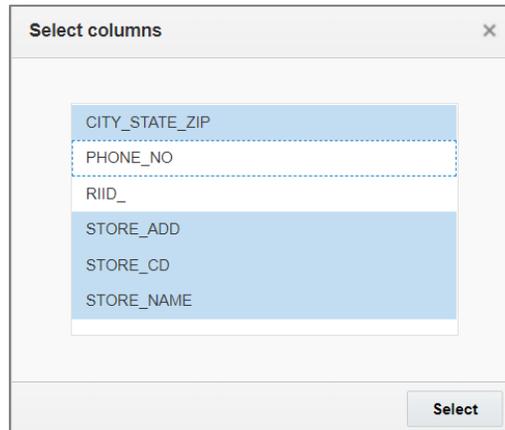
- c. Then, navigate to the folder as specified in in the Weekly Assignment Sheet. Toggle the Join view over using the arrow. (Join view also known as Supplemental Join)
 - i. Then, Click "Select".



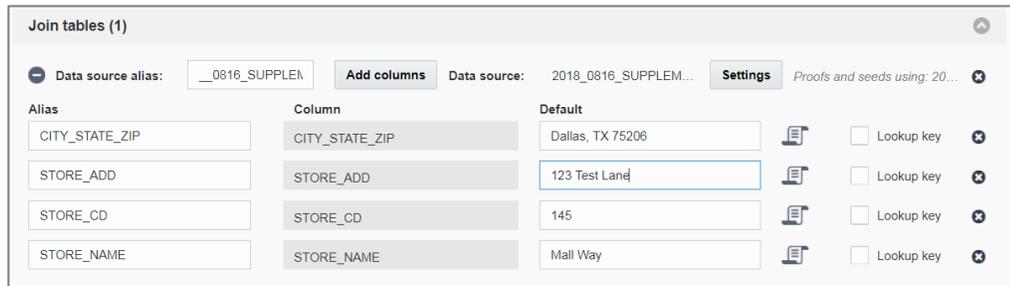
- d. From here, you'll scroll down in the "Data source" pop-up window to find your newly selected Join table. Click "Add columns".



- e. Then add the “columns” you need as specified in the Weekly Assignment Sheet.
 - i. Hit “Select.”



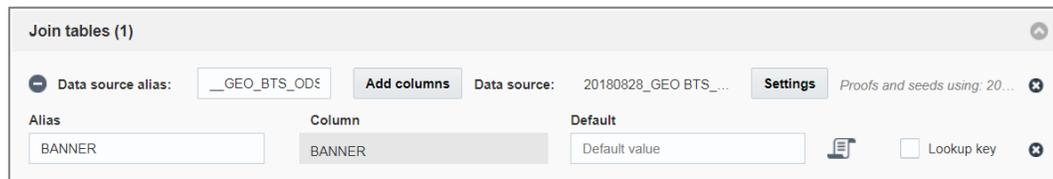
- f. Now you’ll see the aliases you need for your campaign. Assign the Defaults as specified in your Weekly Assignment Sheet.



If you used aliases (aka variables or columns) to denote dynamic content while building your email from the Supplemental data Join View, this will be displayed here automatically.

Example:

If you used “BANNER = Y” for a Dynamic Rule during the E-mail set-up, you would see it displayed here.



Dynamic variables

Dynamic variables are not dependent on a table. They are directed based on what you enter in as the default, set rules for, or have coded as RPL.

1. Should always have in the template:

Alias	Variable	Default
LinkId	Dynamic Variable	JCP
PreHeader	Dynamic Variable	Get the championship gear now!
DISCLAIMER	Dynamic Variable	Default value
GMAIL_LOGO	Dynamic Variable	https://static.cdn.responsys.net/15/ret

- a. LinkID | Default = COMPANY
 - i. This denotes our links coming from a COMPANY produced resource for reporting (as opposed to Facebook, Google, etc.)
- b. PreHeader | Default = *Insert PreHeader from the SL_TT document here*
 - i. Formerly known as the Snippet or Top Text
 - ii. If you are using Dynamic PreHeader, see directions in the Appendix of this document.
- c. DISCLAIMER | Default =
 - i. There is a disclaimer section placeholder for all types of Footers (see next bullet).
 - ii. If you do not need a disclaimer just *leave blank, a greyed out "Default value" text will appear.*

- iii. If you have a disclaimer in your email, you will hard enter it in this section.

- If you have multiple lines of disclaimers you will use the code `

` to put a space in between each line.
- If you need to bold or italicize a certain portion, you need to add this coding into your text.
 - a. For bold words: ` TEXT `
 - b. For italicized words: `<i> TEXT </i>`
 - c. For underlined words: `<u> TEXT </u>`
 - d. More codes, if needed:
 - i. https://www.w3schools.com/html/html_formatting.asp
 - ii. <https://www.ascii.cl/htmlcodes.htm>
- *******If you use a Disclaimer, you will need the code `

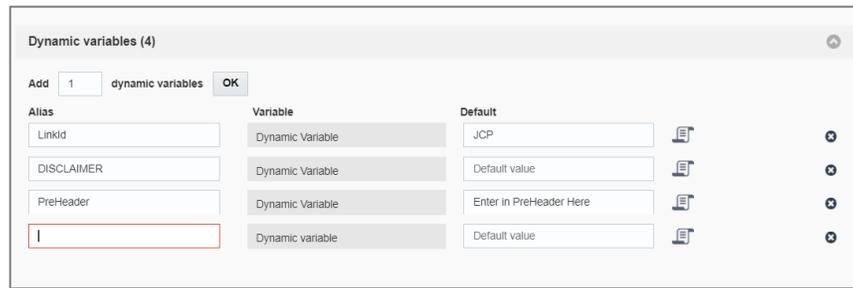
` at the end of the last word to separate it from the rest of the Footer text.*******
- To find the Disclaimer you may need, reference the Disclaimer Guide: <\\legfile\catalog\public2\Planning and Promotions\Planning and Promotions\EMAIL - Execution Documents\Process and Training Documents\Process docs>
- If the text of your Disclaimer is too long, simply add another Dynamic Variable called DISCLAIMEREXTRA for more text. If you need more than these two

variables, add DISCLAIMEREXTRAEXTRA. If you need more than this, reach out to Hayley Tubb.

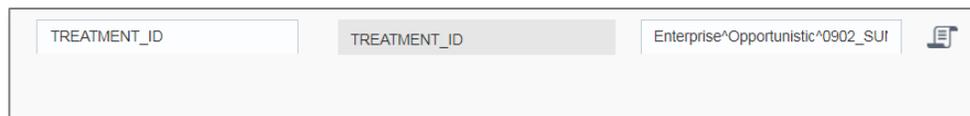
- d. GMAIL_LOGO | Default = https://static.cdn.responsys.net/i5/responsysimages/content/Company/Companylogo_red_100px.png
 - i. This displays a the Company logo in GMAIL Clients (currently in GMAIL apps on mobile devices. Desktop should be rolling this functionality out in mid-year 2019).
- e. If you additional dynamic variables, simply enter the amount you need and click “OK” under the Dynamic variables section of your data sources.



- i. A new line will appear. Enter in the information you need in the fields



- f. If your campaign is using Metadata, you will need to add Treatment_ID to your Dynamic Variables:
 - i. TREATMENT_ID | Default = Enterprise^Opportunistic^0823WKLYAD^0823WKLYAD^Enterprise^TARGET^TARGET^ENT^ENT
 - Replace the green highlighted section above with the naming convention that’s outlined in the Metadata spreadsheet provided by the selection team: MMDDCampaignName



- g. If your campaign is using the GMAIL PROMO_CODE, you'll need to add it to your Dynamic Variables:
 - i. PROMO_CODE | Default = OFFER CODE from the emails/as assigned in the Weekly Assignment Sheet

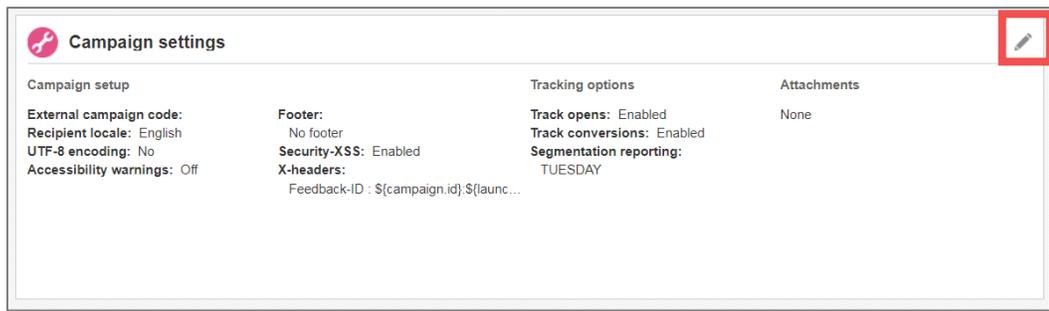
Remember, if you make any changes in this Data sources pop-up window, you need to hit "Save" before you exit the pop-up window.

The screenshot shows a 'Data sources' configuration window. At the top, there are buttons for 'Add new source' and 'Change profile list'. Below these, the 'Data source alias' is set to 'PET_PROFILE_W' and the 'Data source' is 'PET_PROFILE_WEEKLY'. A table shows the mapping of 'Alias' (CARD_TIER_CD) to 'Column' (CARD_TIER_CD) and 'Default' (Default value). A 'Lookup key' checkbox is present. Below this is a section for 'Dynamic variables (5)' with an 'Add' button and a list of variables. The variables and their defaults are:

Alias	Variable	Default
UNSUB	Dynamic Variable	To UNSUBSCRIBE
LinkId	Dynamic Variable	JCP
DISCLAIMER	Dynamic Variable	*GE, GE Profile, GE Café, & Ha
FOOTER	Dynamic Variable	Standard
PreHeader	Dynamic Variable	Enter in Pre-Header Here

At the bottom right, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red border.

Step 4 - Campaign Settings



1. Located in the halfway middle point of the Campaign Workbook after Data Sources. Click on the edit pencil icon highlighted above. A pop-up window will appear.
2. Campaign Setup Dropdown

- a. External Campaign Code: leave blank
- b. Recipient locale: English (UTF-8)
- c. Check mark: Send message with UTF-8 encoding
- d. UNCheck: Display accessibility warnings
- e. Footer:
 - i. Select “No Footer”
- f. Security
 - i. UNCheck: Prevent malicious cross site scripting (XSS)

- g. X-headers *(should already be filled out)*
 - i. X-header name: Feedback-ID
 - ii. X-header value: \${campaign.id}:\${launch.id}:rsysoracle

3. Tracking Options Dropdown

Tracking options

Tracking pixel location

- Place open tracking pixel at the top of the email
- Place open tracking pixel at the bottom of the email

- Track HTML opens
- Track conversions

Select performance reporting

- Track performance for a single segmentation scheme
 - VERSION_CD
- Track performance for a multiple segmentation scheme (5 maximum)
 - Select a segment group

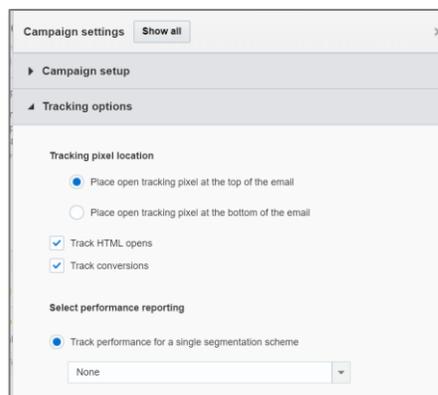
- a. Tracking pixel location:
 - i. Select: Place open tracking pixel at the top of the email
 - ii. Checkmark: Track HTML opens check marked
 - iii. Checkmark: Track conversions check marked
- b. Select performance reporting:
 - i. Select: Track performance for a single segmentation scheme:
 - 1. If using !UnicaList Cuts
 - a. In the dropdown, select “Add data source” in blue, find your file, and CTRL+ the VERSION_CD (if !UnicaListCuts).
 - b. Verify your data source is correct where you defined the VERSION_CD in your “Data Sources” step by hitting the dropdown arrow, insuring VERSION_CD is highlighted blue.

Select performance reporting

- Track performance for a single segmentation scheme
 - VERSION_CD
 - FWFL_FINAL_FINAL
 - SILVER_UNDELIV
 - STATE_
 - EP_WK30_0828_ONE_DAY_FINAL_HOURS_52871_201808
 - BARCODE1_ENTERPRISE_FLG
 - BARCODE2_CHK_DIGIT
 - BARCODE3_ENTERPRISE_FLG

Add data source **Step b.i.1** **Cancel** **Save**

2. If Metadata, select “None”.

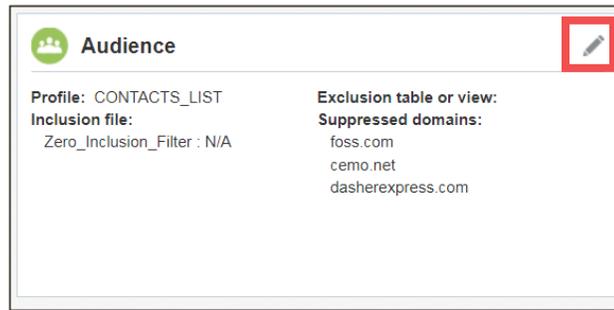


4. Attachments: No action needed.



5. Click “Save”.

Step 5 – Audience / Targeting



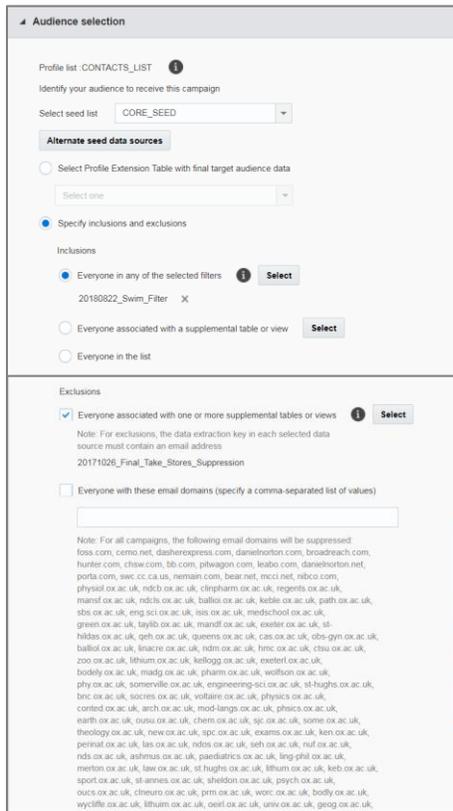
Audience

Profile: CONTACTS_LIST
Inclusion file:
Zero_Inclusion_Filter : N/A

Exclusion table or view:
Suppressed domains:
foss.com
cemo.net
dasherexpress.com

In recent UI updates, this block may have been renamed to “Targeting”

1. Located on the bottom left-hand of the Campaign Workbook. Click on the edit pencil icon highlighted above. A pop-up window will appear.
2. Audience Selection Dropdown



Audience selection

Profile list: CONTACTS_LIST

Identify your audience to receive this campaign

Select seed list: CORE_SEED

Alternate seed data sources

Select Profile Extension Table with final target audience data

Select one

Specify inclusions and exclusions

Inclusions

Everyone in any of the selected filters **2** **Select**

20180922_Swim_Filter X

Everyone associated with a supplemental table or view **Select**

Everyone in the list

Exclusions

Everyone associated with one or more supplemental tables or views **1** **Select**

Note: For exclusions, the data extraction key in each selected data source must contain an email address

20171026_Final_Take_Stores_Suppression

Everyone with these email domains (specify a comma-separated list of values)

Note: For all campaigns, the following email domains will be suppressed:

foss.com, cemo.net, dasherexpress.com, danielnorton.com, broadreach.com, hunter.com, chase.com, tbi.com, glivagon.com, keelo.com, danielnorton.net, ports.com, swe.cc.ca.us, nemain.com, bear.net, mcci.net, nbico.com, physiol.ox.ac.uk, ndcb.ox.ac.uk, clinpharm.ox.ac.uk, regents.ox.ac.uk, mansf.ox.ac.uk, ndrfs.ox.ac.uk, ballio.ox.ac.uk, keble.ox.ac.uk, path.ox.ac.uk, obs.ox.ac.uk, eng.sci.ox.ac.uk, hls.ox.ac.uk, medschool.ox.ac.uk, green.ox.ac.uk, laylb.ox.ac.uk, mandf.ox.ac.uk, exeler.ox.ac.uk, st-hidas.ox.ac.uk, qeh.ox.ac.uk, queens.ox.ac.uk, cas.ox.ac.uk, obs-gyn.ox.ac.uk, balliol.ox.ac.uk, linacro.ox.ac.uk, ndm.ox.ac.uk, hmc.ox.ac.uk, ctbu.ox.ac.uk, zoo.ox.ac.uk, lithum.ox.ac.uk, kellogg.ox.ac.uk, emetel.ox.ac.uk, bodley.ox.ac.uk, mady.ox.ac.uk, pharm.ox.ac.uk, wolfson.ox.ac.uk, phy.ox.ac.uk, somerville.ox.ac.uk, engineering-sci.ox.ac.uk, st-hughs.ox.ac.uk, bnc.ox.ac.uk, socres.ox.ac.uk, voltaire.ox.ac.uk, physics.ox.ac.uk, conted.ox.ac.uk, arch.ox.ac.uk, mod.sangs.ox.ac.uk, physics.ox.ac.uk, earth.ox.ac.uk, outsu.ox.ac.uk, chem.ox.ac.uk, spc.ox.ac.uk, some.ox.ac.uk, theology.ox.ac.uk, new.ox.ac.uk, spc.ox.ac.uk, exams.ox.ac.uk, ken.ox.ac.uk, permat.ox.ac.uk, las.ox.ac.uk, ndbs.ox.ac.uk, seh.ox.ac.uk, nuf.ox.ac.uk, nds.ox.ac.uk, ashmus.ox.ac.uk, paediatrics.ox.ac.uk, ling.phil.ox.ac.uk, merton.ox.ac.uk, law.ox.ac.uk, st-hughs.ox.ac.uk, lithum.ox.ac.uk, keb.ox.ac.uk, sport.ox.ac.uk, st-annes.ox.ac.uk, sheldon.ox.ac.uk, psych.ox.ac.uk, oucs.ox.ac.uk, cneuro.ox.ac.uk, prm.ox.ac.uk, worc.ox.ac.uk, body.ox.ac.uk, wycliffe.ox.ac.uk, lithum.ox.ac.uk, beef.ox.ac.uk, univ.ox.ac.uk, geog.ox.ac.uk,

- a. Profile List: Contacts_List
- b. Select seed list:
 - i. Always select from dropdown: CORE_SEED
 - ii. CTRL + click to add additional seed lists if needed (e.g. SFS_Seed or Return Path Seed).
 1. Additional seeds added will be separated by a comma in the field once selected.
 - iii. If Trigger campaign, select “Triggered_CRM_Seed”
- c. Bubble in “Specify inclusions and exclusions:”

i. Inclusions

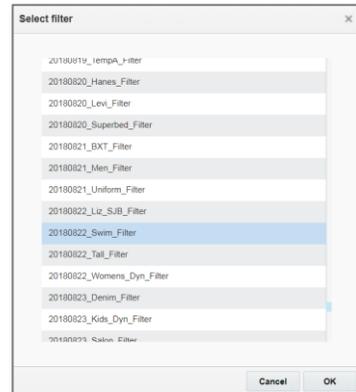
1. Select “Everyone in any of the selected filters”

a. Hit “Select”



i. Choose the corresponding filter for your campaign.

ii. Click “OK”

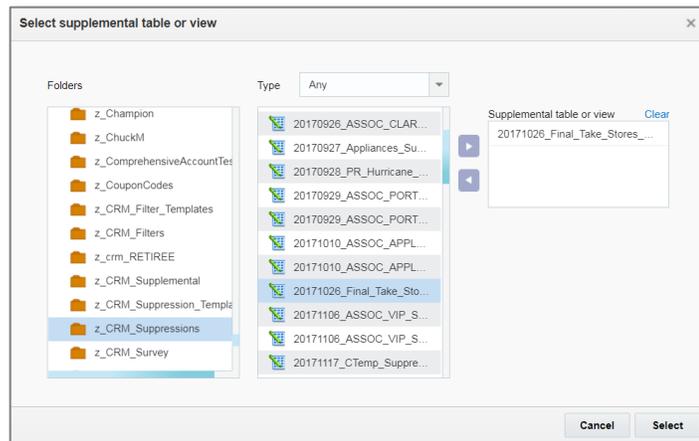


d. Exclusions

- i. If not otherwise specified below or in the Weekly Assignment Sheet, leave UNChecked.
- ii. If Tuesday or Saturday email campaign, select “Everyone associated with one or more supplemental table or views”
 1. Hit “SELECT” button.



2. Choose the corresponding exclusions as outlined below by navigating to the specified folder and toggling over the using the blue arrow.



a. Tuesday Send Exclusions

- i. Triggered_CRM_Mens >>
 1. Triggered_CRM_Mens_Tailored_Suppression_File
- ii. Triggered_CRM_Retargeting >>
 1. Triggered_CRM_Retargeting_Curtains_Suppression
- iii. Triggered_CRM_Womens_Basic >>
 1. Triggered_CRM_Womens_Basic_Suppression
- iv. Hit “Select”

b. Saturday Send Exclusions

- i. Triggered_CRM_Mens >>
 1. Triggered_Mens_Suppression_File
- ii. Triggered_CRM_Retargeting >>
 1. Triggered_CRM_Retargeting_Bedding_Suppression
- iii. Hit “Select”

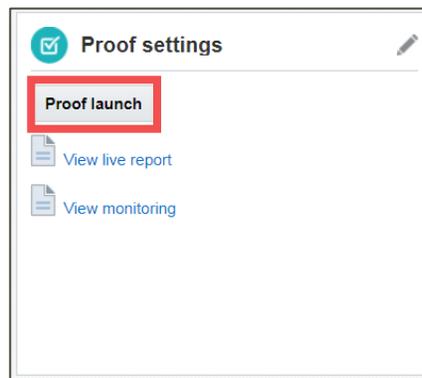
3. Hit “Save” in the pop-up window.

Step 6 - Proof settings

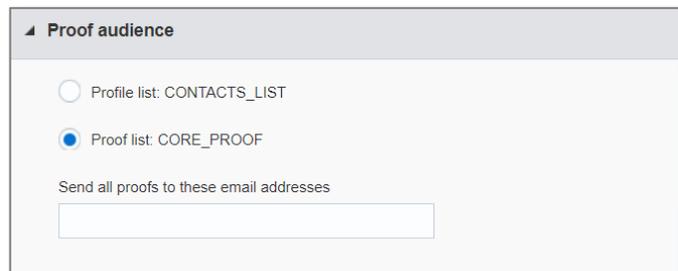
1. Before you launch a Proof, select “Validate” in the upper right-hand corner of your Workbook. This will check for any “major errors” with your campaign so you can resolve them before you send your Proof.



- a. Major Errors are pieces of information missing from your Workbook set-up (e.g., not setting a Filter in the Audience, not selecting a Profile List, not associating any data sources to the campaign, etc.). Your email campaign could still “skip” (aka not send) if there is a missing link or incorrect data source selected.
2. Now you’re ready to launch your Proof. Located on the right-hand side towards the top of the Campaign Workbook. Click on “Proof launch” button highlighted above (**not the edit pencil – that selection won’t give you everything you need to send your Proof**).

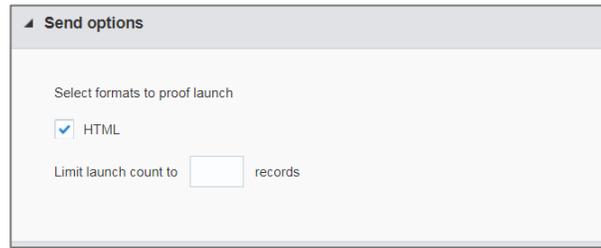


3. Proof Audience Dropdown



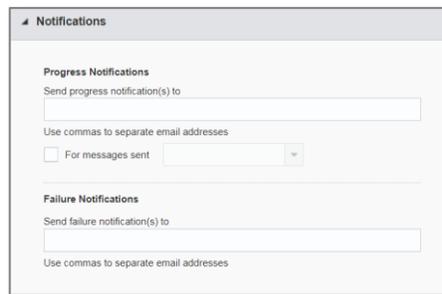
- a. Sending to yourself or individual person for review: *(Best Practice: Send to yourself before sending to the entire Proof List to QA your email first and work out any kinks)*
 - i. Profile List: Core_Proof
 - ii. Send all proofs to these email addresses: Enter intended email (either yourself or individuals)
 1. If Trigger campaign, select “Triggered_CRM_Seed”
- b. Sending to entire Proof List
 - i. Profile List: Core_Proof
 - ii. Send all proofs to these email addresses: leave blank

4. Send Options Dropdown



- a. Checkmark: HTML
- b. If sending to just an individual person, limit launch count to “1” records so you (or the recipient) doesn’t receive a bunch of emails for proofing.
- c. If sending to entire Proof List, leave blank.

5. Notifications Dropdown:

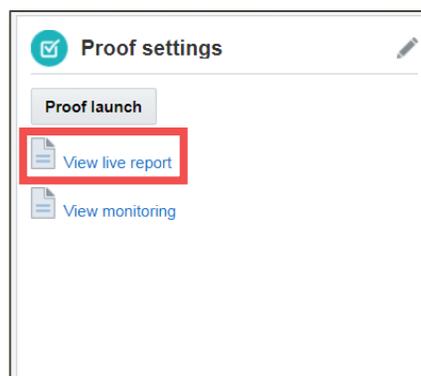


- a. Don’t fill anything out.

6. Click “Proof Launch” to send a Proof.

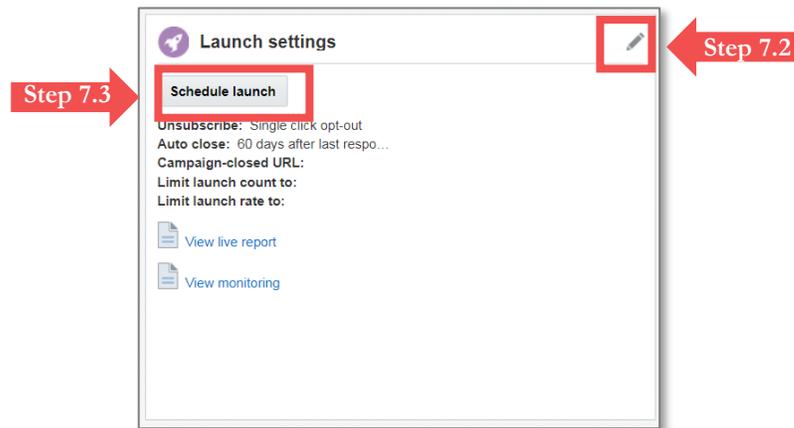


- a. Check the “View live report” for any additional minor errors, skips, or issues.



7. Troubleshoot and edit your campaign as needed. Continue to send additional proofs following the steps above until correct and approved by your QA buddy.

Step 7 - Launch settings



1. Located on the bottom right-hand of the Campaign Workbook.
2. Click on the edit pencil icon highlighted above.
 - a. Unsubscribe Dropdown

- i. Select “Link opt-out to the standard single-click immediate unsubscribe action.”
 - ii. Checkmark “Insert list-unsubscribe email header in message”
- b. Auto-close Dropdown

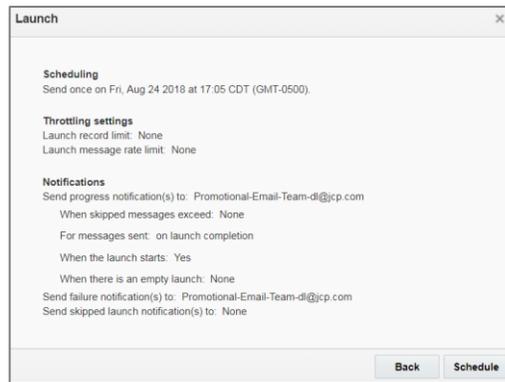
- i. Select “No Auto-close”
- c. Throttling settings – leave blank

d. Notifications

- i. Send progress notification(s) to Promotional-Email-Team-dl@Company.com
 - ii. Checkmark “For messages sent (*from dropdown*) on launch completion”
 - iii. Checkmark “When the launch starts”
 - iv. Send failure notification(s) to Promotional-Email-Team-dl@Company.com
- e. Click “Save”
3. Click on the “Schedule launch” button

- a. Scheduling Dropdown
 - i. Select “Once”
 1. Time: hh:mm am/pm
 - a. NOT military time. For this example 1:05 pm
 2. Date: choose from the date picker
- b. Throttling settings Dropdown – blank as notated above in Step 7.2 unless otherwise specified
- c. Notification Dropdown – make sure it is filled out as notated above in Step 7.2

4. Click “Next”. Verify information is correct on the pop-up window. This is your last chance to make changes before you schedule or immediately deploy.



5. Click “Schedule.”
6. You’ve schedule your email! Way to go!



Appendix

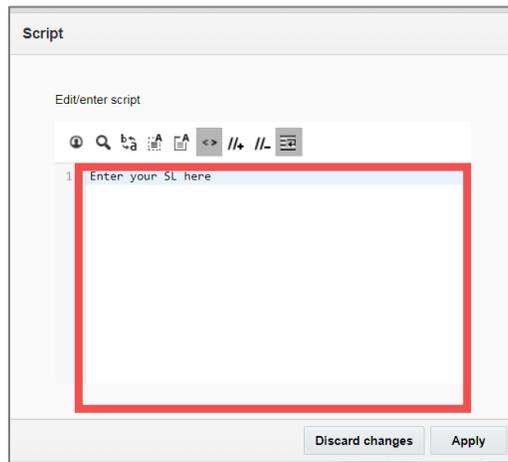
Personalization variable in Subject Lines/Preheaders

Personalization variables (like First Name) can be piped into Subject Lines and Preheaders. The following instructions are for the Subject Line, however the same thought process works for Preheader— except you'll do the steps in the Dynamic Variables section of the Data Sources):

1. While building your email, click the “Scroll” icon located next to the Subject line text field



2. In the source code box pictured below, input the following script, update where notated:



Highlighted:

- **green** is the name of your First_Name variable that will be pulled from PET_PROFILE_DAILY
- **yellow** is the corresponding subject line you need with and without the first name if there isn't one.

Opening `<#if>` statement starts the script for your Subject Line that includes a First_Name

`<#else>` statement covers if the Consumer does not have a First_Name on file.

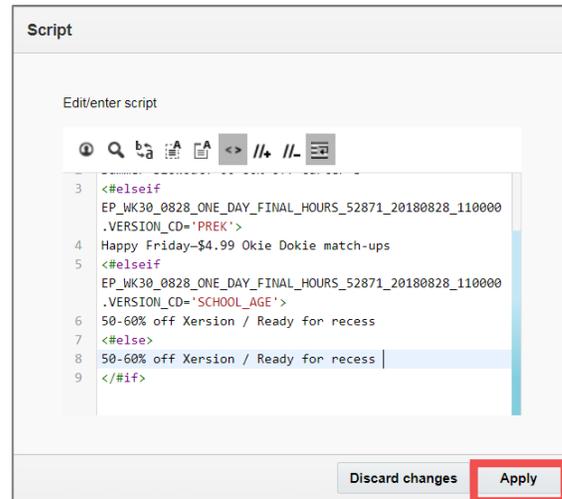
```
<#if PET_PROFILE_DAILY.FIRST_NAME != ">  
${FIRST_NAME}, get your glasses in time for classes!  
<#else>  
Get your glasses in time for classes!  
</#if>
```

Closing `</#if>` statement ends for your Subject line First Name Rule

CLEAN SCRIPT FOR COPY AND PASTING:

```
<#if PET_PROFILE_DAILY.FIRST_NAME != ">  
${FIRST_NAME}, write your SUBJECT LINE here moving the first name  
where needed.  
<#else>  
Write your subject line without the first name variable here.  
</#if>
```

3. Click “Apply”



4. You can toggle through your Subject Lines to see them display.

Dynamic Subject Lines / Friendly Froms / PreHeaders

Dynamic Subject Lines / Friendly Froms / PreHeaders are used when a creative content piece within the email is dynamic based on an audience segment. Examples of Email Campaigns that typically use Dynamic Subject Lines are: Kids Dynamic, Lingerie Dynamic, Womens Dynamic etc.

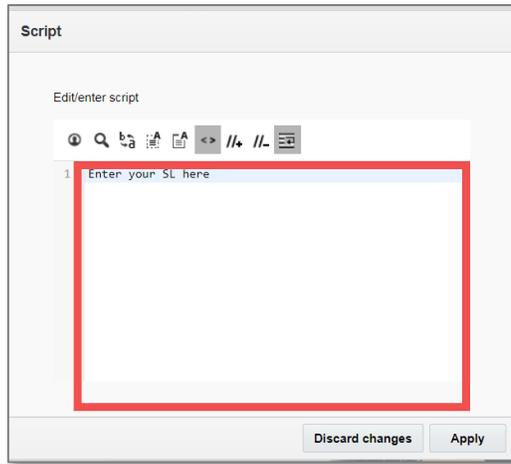
In this example, we're outlining the process for Kids Dynamic using 3 Dynamic Subject Lines and Friendly Froms.

Dynamic Subject Lines

5. While building your email, click the "Scroll" icon located next to the Subject line text field



- a. You will need to know the Subject Line that will be paired with the particular audience segment (the VERSION_CD)



6. In the source code box pictured above, input the following script, update where notated:

Highlighted:

- **green** is the name of your !UnicalistCut or Metadata SQL
- **purple** is the name of the specific VERSION_CD
- **yellow** is the corresponding subject line for each VERSION_CD

Opening `<#if>` statement starts the script for your Dynamic Subject Line

You can copy `<#elseif>` statement as many times as you need depending on how many Dynamic Subject lines you need

```

<#if AUDIENCEDATAFILENAME.VERSION_CD = 'BABY'>
Summer Blowout! 60-80% off Carter's
<#elseif AUDIENCEDATAFILENAME.VERSION_CD = 'PREK'>
Happy Friday—$4.99 Okie Dokie match-ups
<#elseif AUDIENCEDATAFILENAME.VERSION_CD = 'SCHOOL_AGE'>
50-60% off Xersion / Ready for recess
<#else>
50-60% off Xersion / Ready for recess
</#if>

```

`<#else>` statement is for the “Default” Subject Line

Closing `</#if>` statement ends for your Dynamic Subject Line

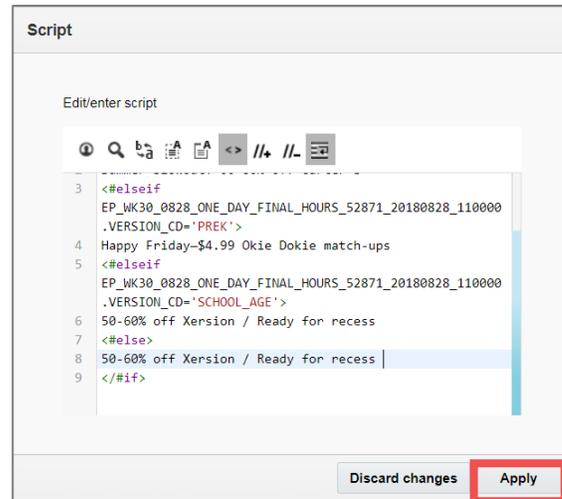
CLEAN SCRIPT FOR COPY AND PASTING:

```

<#if AUDIENCEDATAFILENAME.VERSION_CD='VERSIONCODEA'>
ENTER SUBJECT LINE 1 HERE
<#elseif AUDIENCEDATAFILENAME.VERSION_CD='VERSIONCODEB'>
ENTER SUBJECT LINE 2 HERE
<#elseif AUDIENCEDATAFILENAME.VERSION_CD='VERSIONCODEC'>
ENTER SUBJECT LINE 3 HERE
<#else>
ENTER DEFAULT SUBJECT LINE HERE
</#if>

```

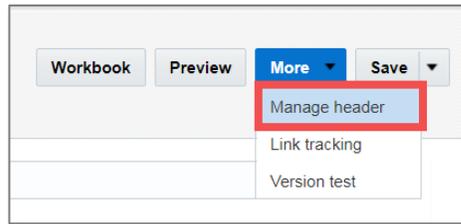
7. Click “Apply”



8. You can toggle through your Subject Lines to see them display.
 - b. You'll need to associate your Audience Data to your campaign in order to see the subject lines display.

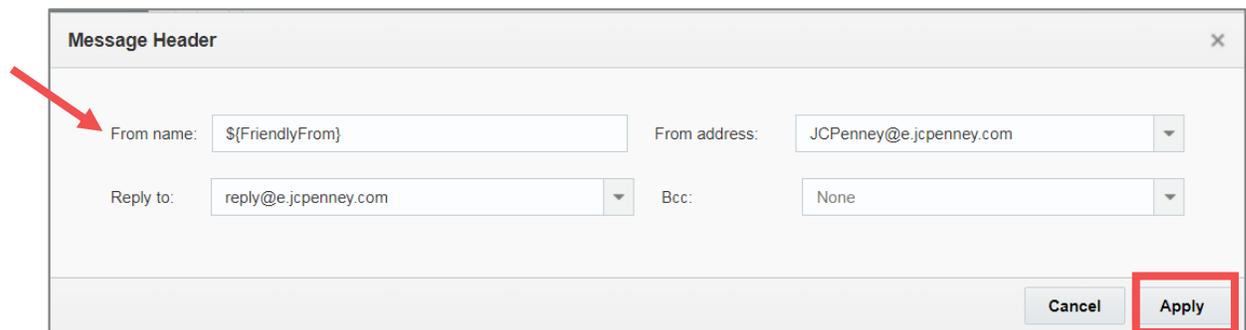
Dynamic Friendly Froms

1. While building your email, click More>Manage Header

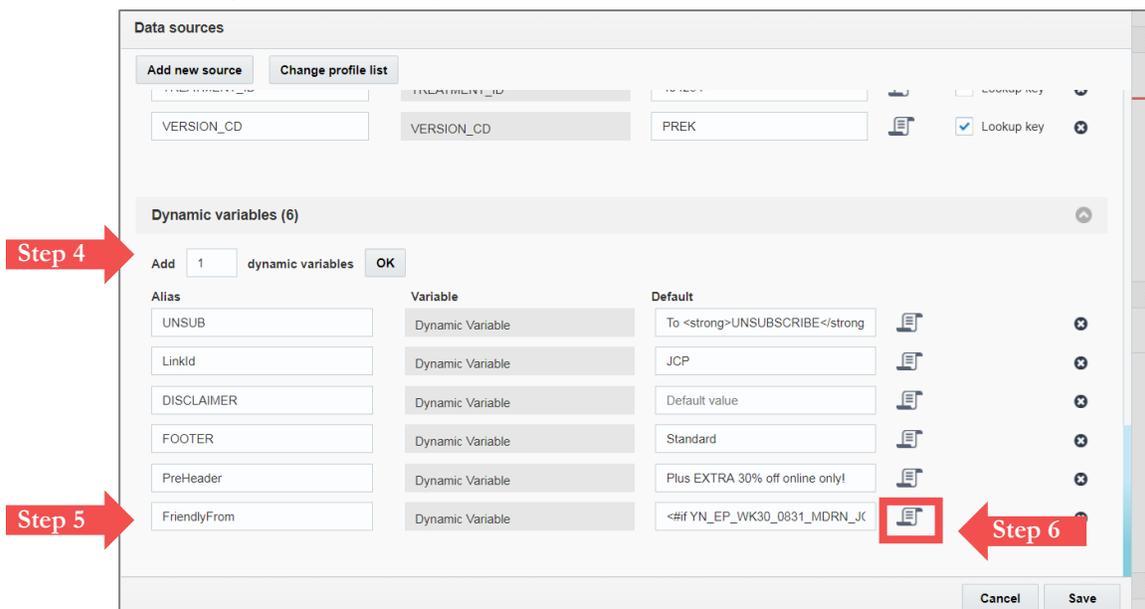


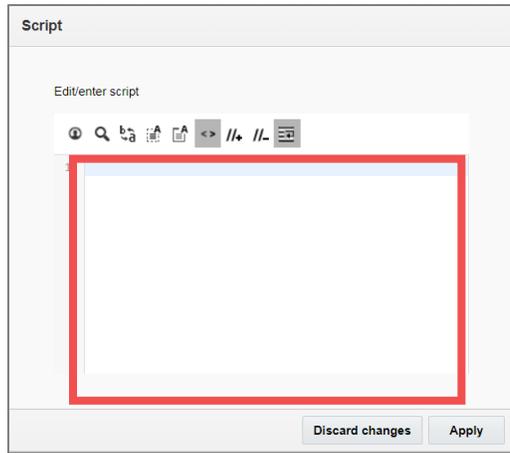
2. In the “From name” text field insert the RPL syntax:

`${FriendlyFrom}`



3. Click “Apply”.
4. In your Data Sources, add a Dynamic Variable.
5. Type in the alias: FriendlyFrom
 - a. Just the text “FrindlyFrom”, **NOT** the RPL Syntax `${FriendlyFrom}`
6. Click the “Scroll” icon next to the FriendlyFrom Default text box.
 - a. You will need to know the FriendlyFrom that will be paired with the particular audience segment (the VERSION_CD)





7. Just like you would do for the Dynamic Subject Line, enter in the source code box pictured above, input the following script, update where notated:

Highlighted:

- **green** is the name of your !UnicalistCut or Metadata SQL
- **purple** is the name of the specific VERSION_CD
- **yellow** is the corresponding FriendlyFrom for each VERSION_CD

Opening `<#if>` statement starts the script for your Dynamic FriendlyFrom

You can copy `<#elseif>` statement as many times as you need depending on how many Dynamic FriendlyFroms you need

```

<#if AUDIENCEDATAFILENAME.VERSION_CD = 'BABY'>
Company Baby
<#elseif AUDIENCEDATAFILENAME.VERSION_CD='PREK'>
Company Kids
<#elseif AUDIENCEDATAFILENAME.VERSION_CD='SCHOOL_AGE'>
Company Kids
<#else>
Company Kids
</#if>

```

`<#else>` statement is for the “Default” FriendlyFrom

Closing `</#if>` statement ends for your FriendlyFrom

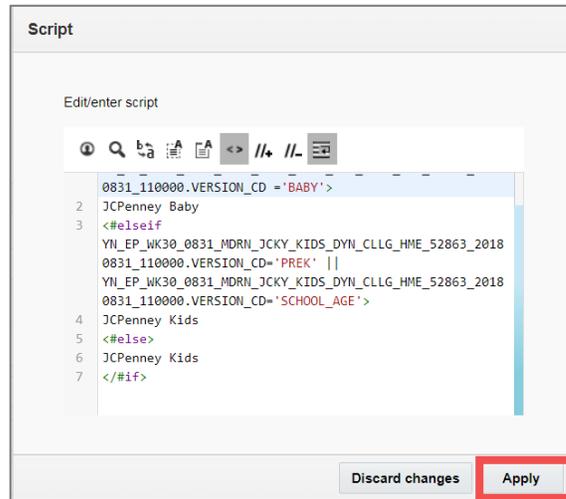
CLEAN SCRIPT FOR COPY AND PASTING:

```

<#if AUDIENCEDATAFILENAME.VERSION_CD= 'VERSIONCODEA'>
ENTER FRIENDLYFROM 1 HERE
<#elseif AUDIENCEDATAFILENAME.VERSION_CD= 'VERSIONCODEB'>
ENTER FRIENDLYFROM 2 HERE
<#elseif AUDIENCEDATAFILENAME.VERSION_CD= 'VERSIONCODEC'>
ENTER FRIENDLYFROM 3 HERE
<#else>
ENTER DEFAULT FRIENDLYFROM HERE
</#if>

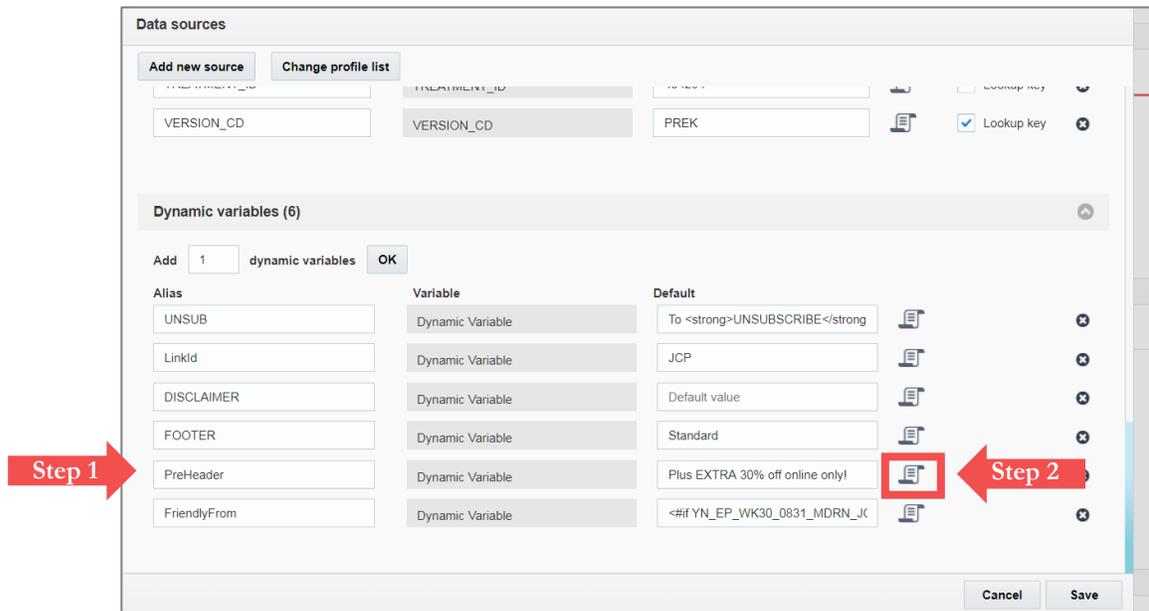
```

8. Click “Apply”

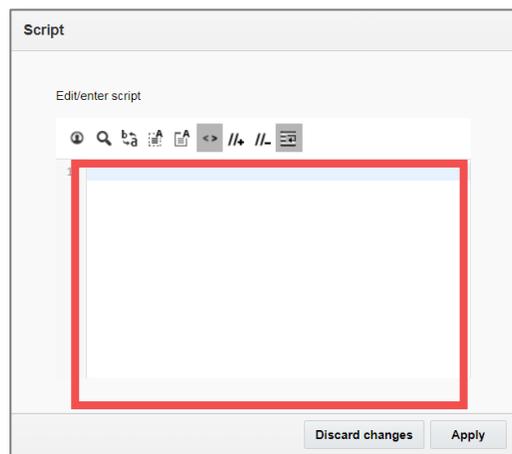


Dynamic PreHeaders

1. In your Data Sources, navigate to your PreHeader.
2. Click the “Scroll” icon next to the PreHeader Default text box.
 - a. You will need to know the PreHeader that will be paired with the particular audience segment (the VERSION_CD)



3. Just like you would do for the Dynamic Subject Line or Dynamic FriendlyFrom, enter in the source code box pictured above, input the following script, update where notated:



Highlighted:

- **green** is the name of your !UnicaListCut or Metadata SQL
- **purple** is the name of the specific VERSION_CD
- **yellow** is the corresponding FriendlyFrom for each VERSION_CD

Opening `<#if>` statement starts the script for your Dynamic PreHeader

You can copy `<#elseif>` statement as many times as you need depending on how many Dynamic PreHeader you need

```
<#if AUDIENCEDATAFILENAME.VERSION_CD = 'BABY'>  
Plus EXTRA 30% off online only!  
<#elseif AUDIENCEDATAFILENAME.VERSION_CD = 'PREK'>  
Plus EXTRA 30% off online only and Exclusive Deal for Kids!  
<#elseif AUDIENCEDATAFILENAME.VERSION_CD = 'SCHOOL_AGE'>  
Plus EXTRA 30% off online only and Exclusive deal for Kids!  
<#else>  
Plus EXTRA 30% off online only!  
</#if>
```

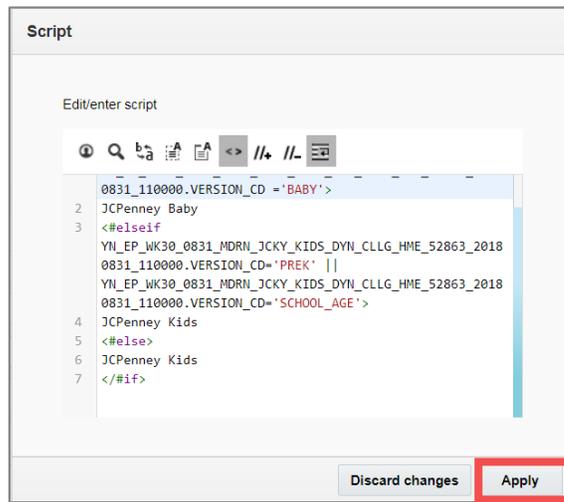
`<#else>` statement is for the “Default” PreHeader

Closing `</#if>` statement ends for your PreHeader

CLEAN SCRIPT FOR COPY AND PASTING:

```
<#if AUDIENCEDATAFILENAME.VERSION_CD= 'VERSIONCODEA'>  
ENTER PREHEADER 1 HERE  
<#elseif AUDIENCEDATAFILENAME.VERSION_CD= 'VERSIONCODEB'>  
ENTER PREHEADER 2 HERE  
<#elseif AUDIENCEDATAFILENAME.VERSION_CD= 'VERSIONCODEC'>  
ENTER PREHEADER 3 HERE  
<#else>  
ENTER DEFAULT PREHEADER HERE  
</#if>
```

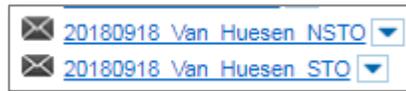
4. Click “Apply”



STO & STO_BO Campaign Set-up

These are steps you will need to take if your campaign will be using a Regular STO or STO_BO Program. Refer to the Program Process Document for actual set-up of the Program for the campaign. These instructions are only for the email itself.

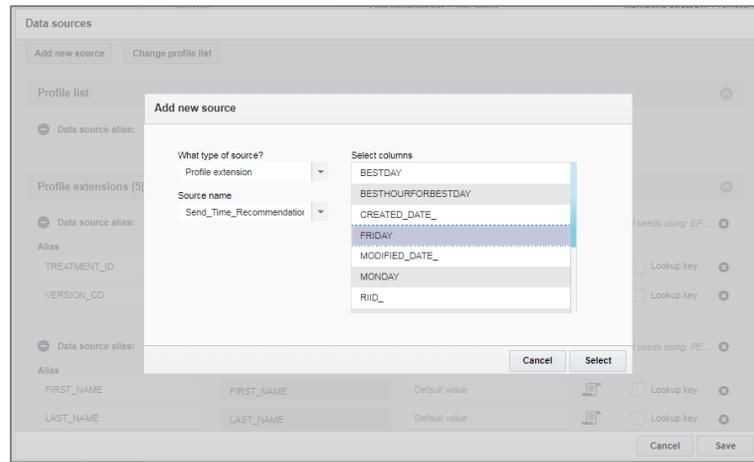
1. You will first create your campaign following the normal Promotional Campaign steps listed in this document, however you should label it ending in _NSTO.
2. Then, you'll copy your _NSTO campaign and rename it with _STO



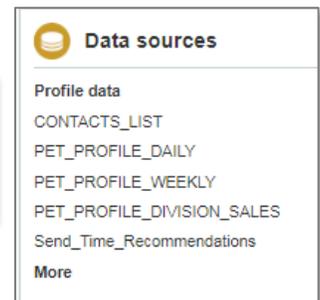
- a. In total, you should end up with two identical emails visually. The set-up of them will be the only difference.
3. For the STO Campaign ONLY, the following differences will need to be made:
 - a. **Data Sources**



- i. Add the Profile Extension: Send_Time_Recommendations
- ii. Select the day your campaign is set to deploy



- iii. Your Data Sources should now have this listed:

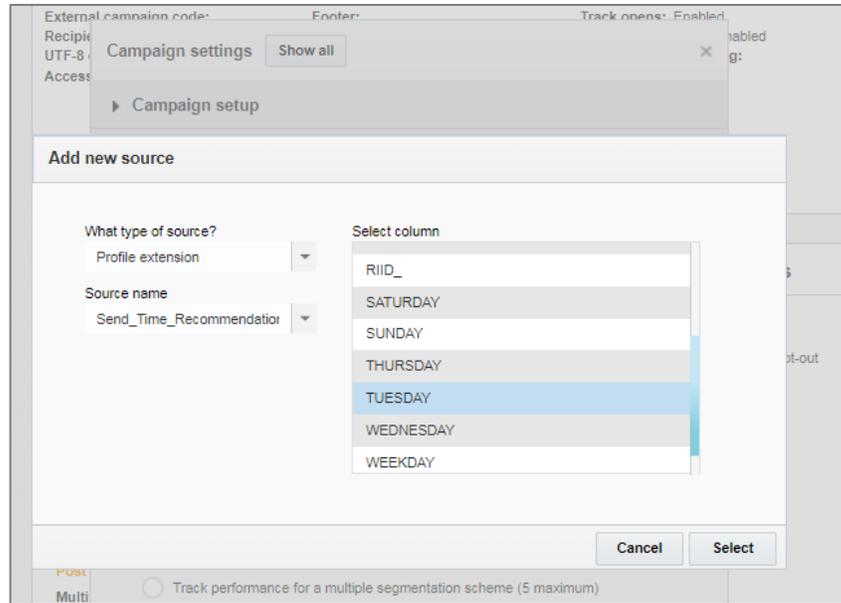


- iv. Click "Save"

b. Campaign Settings

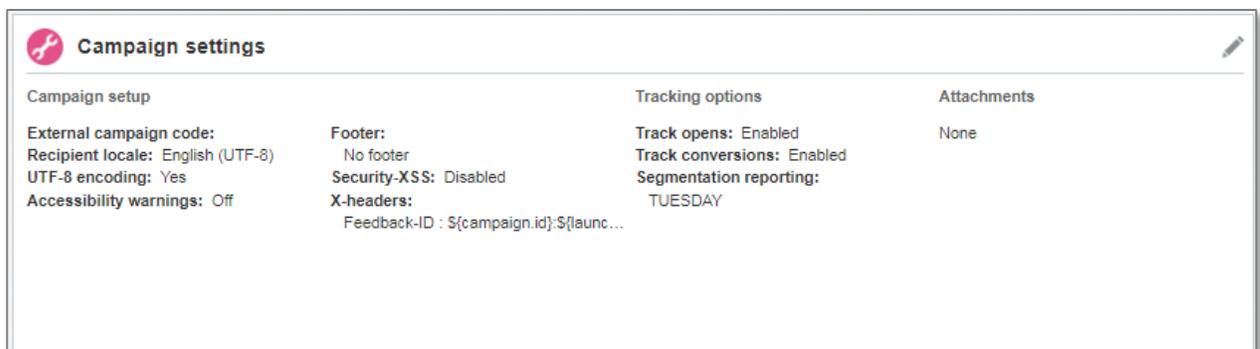
i. Tracking Options Dropdown

1. Select performance reporting:
 - a. Select: Track performance for a single segmentation scheme:
 - b. Select the Add data source
 - c. **This may differ depending on reporting needs. This will be communicated with you if needed to be different.*
2. Add data source (in blue)
3. Add the Profile Extension “Send_Time_Recommendations” and select the day the campaign is to deploy.



ii. Hit “Save”

iii. Your Campaign Settings should now have this listed

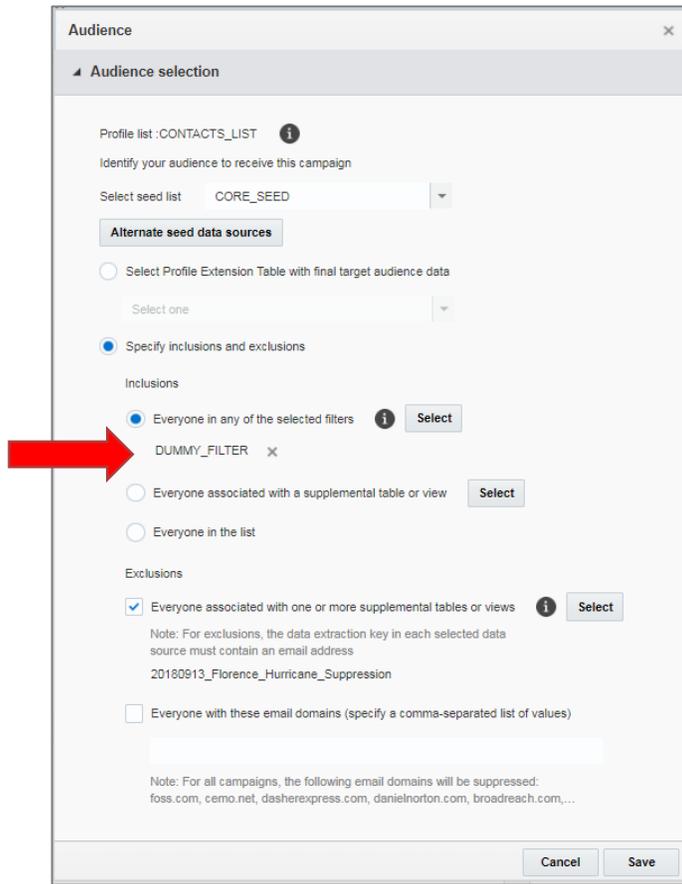


iv. **Sometimes you may use Version_CD tied to your audience data file rather than the Send_Time_Recommendations. Look to the Weekly Assignment Sheet for this distinction.*

c. Audience

i. Audience Selection Dropdown

1. Remove the NSTO filter that you have in place and replace it with the DUMMY FILTER



2. Click "Save"

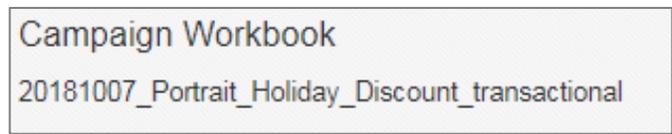
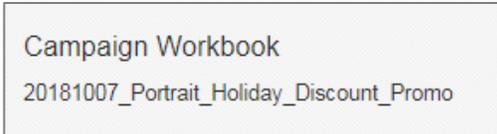
4. You're now ready to build your program: [Process Document Responsys Programs](#)

Associate Email Campaign Set-up

When sending Associate emails, there will be two emails, one will be the Promotional and one will be the Transactional email (the Transactional EMD Workbook mentioned previously).

The Promotional Associate email goes to retirees and former associates who have opted-in to continue to receive emails from the company.

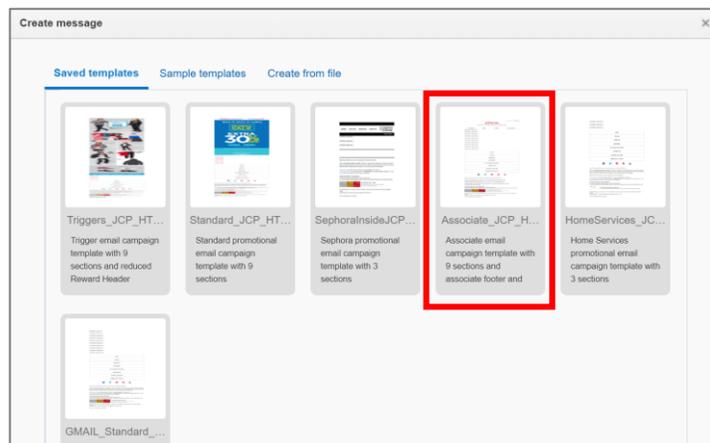
The Transactional Associate email goes to currently employees of Company (the key difference is that this email WILL NOT contain an unsubscribe link).



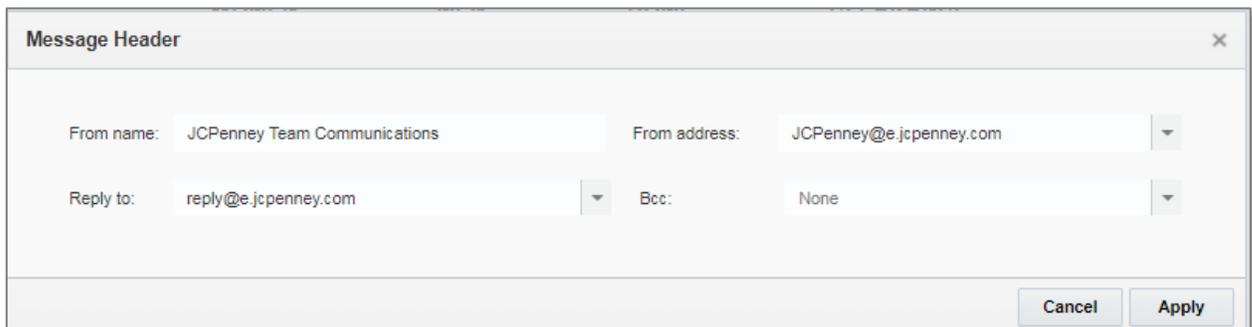
Both emails will go through the following steps:

E-Mail

- Both emails will use the Associate_COMPANY_HTML_Template.

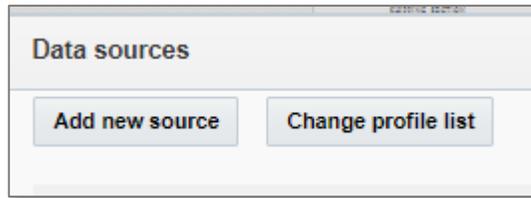


- Set Header to Company Team Communications

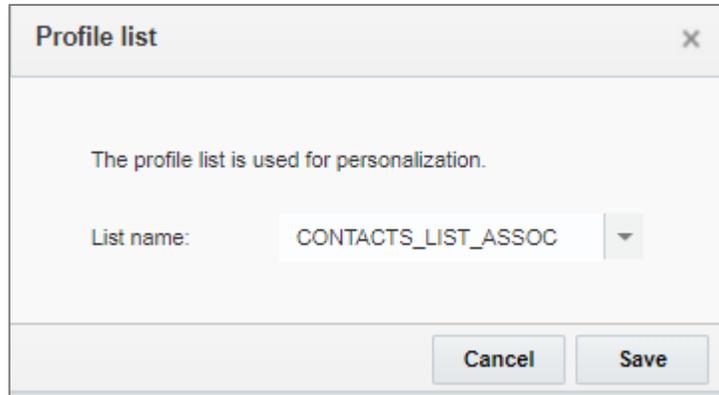


Data Sources

- Select Change Profile list



- Set to: CONTACTS_LIST_ASSOCIATE
 - Click "Save"



Audience

- For the Promotional Associate Email
 - You'll set the inclusions to the XXXX_Promo_Filter defined by the Selection Team
 - You'll set the exclusions to the XXX_Trans_SUPPRESSION defined by the Selection Team
 - Example:

The screenshot shows the 'Audience' dialog box with the 'Audience selection' section expanded. The profile list is 'CONTACTS_LIST_ASSOC'. The 'Select seed list' is set to 'None'. The 'Specify inclusions and exclusions' option is selected. Under 'Inclusions', the radio button 'Everyone in any of the selected filters' is selected, and the filter '20181007_Employee_Portrait_Promo_Filter' is added. Under 'Exclusions', the checkbox 'Everyone associated with one or more supplemental tables or views' is checked, and the exclusion '20181007_Employee_Portrait_TRANS_Suppression' is added. A note at the bottom states: 'Note: For all campaigns, the following email domains will be suppressed: foss.com, cemo.net, dasherexpress.com, danielhorton.com, broadreach.com,...'.

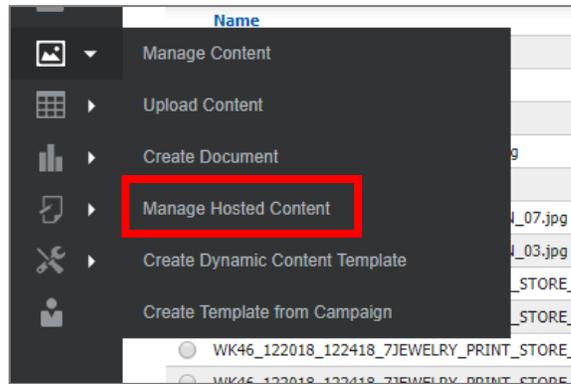
- For the Transactional Associate Email:
 - You'll set the inclusions to the XXXX_Trans_Filter defined by the Selection Team
 - You'll set the exclusions to the XXX_Promo_SUPPRESSION defined by the Selection Team
 - Example:

The screenshot shows the 'Audience' dialog box with the 'Audience selection' section expanded. The profile list is 'CONTACTS_LIST_ASSOC'. The 'Select seed list' is set to 'Core_Seed_Assoc'. The 'Specify inclusions and exclusions' option is selected. Under 'Inclusions', the radio button 'Everyone in any of the selected filters' is selected, and the filter '20181015_Associate_Email_Trans_Filter' is added. Under 'Exclusions', the checkbox 'Everyone associated with one or more supplemental tables or views' is checked, and the exclusion '20181015_Associate_Email_PROMO_Suppression' is added. A note at the bottom states: 'Note: For exclusions, the data extraction key in each selected data source must contain an email address'.

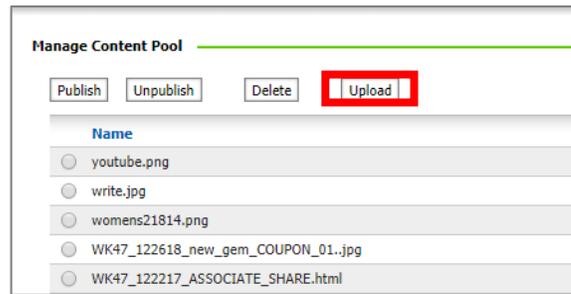
Associate Share Campaigns

COMPANY Associates sometimes get a “heads up” to share with their friends and family for certain events. This comes in the form of an email with “social share” icons to share an image. This section outlines how to create the links for these “social shares.”

1. You will need to get a jpeg version of the body of the email from the creative team.
2. You will host this jpeg on the Responsys website.
 - a. Navigate to Content>>
 - i. Manage Hosted Content>>



- b. Click “Upload”



- c.

Adding or Correcting Alt Text

The Coding Team may accidentally leave out Alt Text or have a typo or missing information. You can easily correct this yourself without having to send back to the Coding Team. Just make sure to let them know what you updated so they can make sure their files reflect this change.

1. Simply go to the left hand navigation >>Content>>Manage Content>>Your email campaign folder
2. Hover over the .htm file within that folder to get an arrow. Click the arrow and select “edit”
3. The HTML file will open on a pop-up window. Drag open the code source on the lefthand side of the window.
4. Find the alt text you need to amend
 - a. TIP: Click on the image on the righthand side to quickly go to that place in the code where the alt text is missing or needs changes
5. Find in the code the sequence alt=“missing alt text” or alt=“incorrect alt text”

```
<td>
  <a class="owaImgFix" href="$clickthrough(bdy_appl_financing,LinkId=bdy_appl_financing)$">
    </a></td>
</td>
```

6. Enter missing alt text in between the two quotation marks

```
<a class="owaImgFix" href="$clickthrough(bdy_appl_financing,LinkId=bdy_appl_financing)$">
  </a></td>
```

7. Click “Save” in the window.
8. Your email campaign should automatically update.
9. Click the “View in browser” link from your existing email to re-check the alt text.

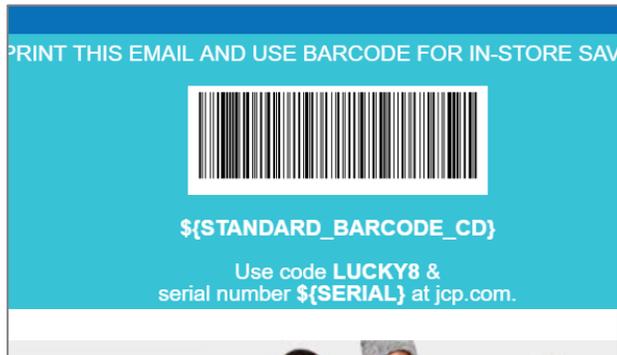
Campaigns Using Coupons Barcodes

From time to time, emails will contain use and kill barcodes for certain promotions.

The only difference in setting up this campaign is making sure the coding team has the following variables inputted into the HTML code and having aliases pulled in from the PET and created as a Dynamic Variables in the Data Sources step.

These are the only difference with campaign set-up other than Proofing. Continue reading for details on this step.

Variables Within the Email



- `${STANDARD_BARCODE_CD}` = this is the alphanumerical string of the barcode that is assigned to individual consumer
- `${SERIAL}` = this is the last 10 digits of the Standard Barcode string used to verify the barcode for online purchases

Data Sources

Profile Extension Table

In addition to the TREATMENT_ID and the VERSION_CD, you'll need to add columns:

- BARCODE1_ENTERPRISE_FLG = flag that there is a barcode available
- BARCODE2_CHK_DIGIT = verification of the barcode
- M7_AD_ID = variable passed to the M7 landing page
- MNEMONIC_BARCODE_ID = display of the barcode
- MOBILE_BARCODE_CD = mobile display for the barcode
- STANDARD_BARCODE_CD = alphanumeric string of the barcode

Leave all of the Default text field blank and checkmark "lookup key".

Alias	Column	Default	Lookup key
BARCODE1_ENTERPRISE_FLG	BARCODE1_ENTERPRISE_FLG	Default value	<input checked="" type="checkbox"/>
BARCODE2_CHK_DIGIT	BARCODE2_CHK_DIGIT	Default value	<input checked="" type="checkbox"/>
M7_AD_ID	M7_AD_ID	Default value	<input checked="" type="checkbox"/>
MNEMONIC_BARCODE_ID	MNEMONIC_BARCODE_ID	Default value	<input checked="" type="checkbox"/>
MOBILE_BARCODE_CD	MOBILE_BARCODE_CD	Default value	<input checked="" type="checkbox"/>
STANDARD_BARCODE_CD	STANDARD_BARCODE_CD	Default value	<input checked="" type="checkbox"/>
TREATMENT_ID	TREATMENT_ID	408072	<input type="checkbox"/>
VERSION_CD	VERSION_CD	Default value	<input type="checkbox"/>

Dynamic Variables

You'll also need to add a dynamic variable titled: SERIAL

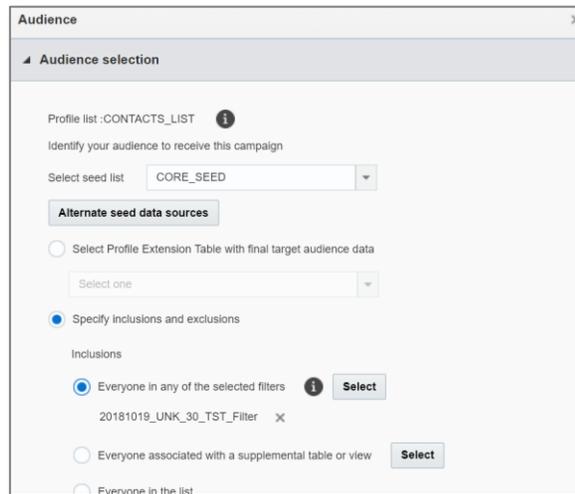
In the Default text field for this variable you will need to copy and paste the following string making sure to update the part highlighted in green with your campaign's PET (aka !UnicaListCust file):

```
#{EP_WK37_1019_MYSTERY_SALE_56710_20181019_110000}STANDARD_BARCODE_CD?substring(14,24)}
```

Alias	Variable	Default
LinkId	Dynamic Variable	JCP
PreHeader	Dynamic Variable	Open NOW to reveal just how much
DISCLAIMER	Dynamic Variable	*Extra 40% off select appar
SERIAL	Dynamic Variable	\$EP_WK37_1019_MYSTERY_SAL

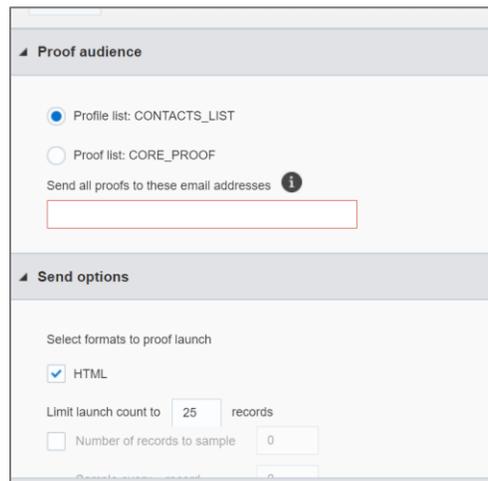
Proofing

To Proof Campaign emails so that the barcode shows up, and so we don't "use and kill" a live barcode intended for real consumer, you should associate the "XXXX_TST_Filter" as defined by the Selection Team to your Audience/Targeting block (just remember to set to the correct Filter before deployment).



When you're ready to send a Proof, you should set to Proof List: Contact.List; and limit launch count to about 25 records so that you can have various emails to test that the barcode is pulling through. Launch the proof and check like you normally would.

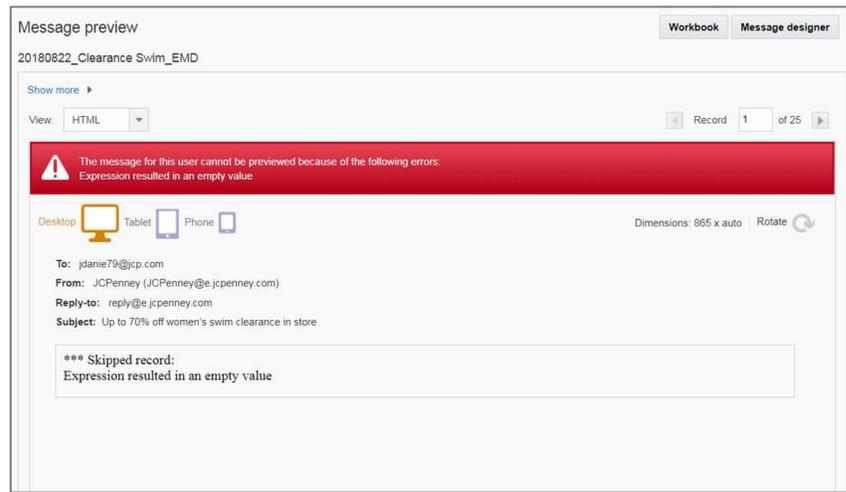
You'll need to send a copy of the Proof to both the .Com and Barcode teams for verification on their ends that the barcode is working as expected.



Again, remember to set your Audience Filter back to the intended recipients (NOT THE TEST Filter) before deployment.

Common Error Messages and How to Troubleshoot

Expression resulted in an empty value



Troubleshoot: Check your Dynamic Content Rules are set up correctly, more specifically your “Null” rule.

Execution runtime error... Unexpected end of file reached



Troubleshoot: Check the “clickthrough” RPL structure in your email/offer/banner contents source code.

You’ll want to make sure it has an opening brace after the dollar sign, single quotation mark around bdy, single quotation mark about LinkID, and a closing brace after the final parentheses:

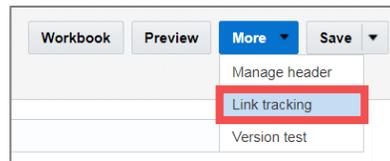
```
}${clickthrough(bdy_msx_boys_shop_now_bnr,LinkId=bdy_msx_boys_shop_now_bnr)}
```

Unable to find clickthrough link

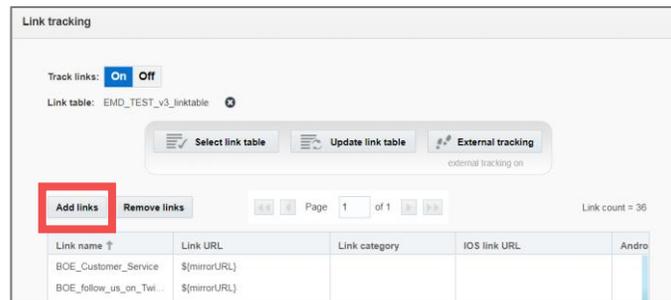


Troubleshoot: Check your bdy tags and bdy URLs in your Link Table. Make sure all are accounted for where needed. If accounted for in your uploaded Link Table, check the source code of your images to make sure the bdy tags and bdy URLs are properly inserted.

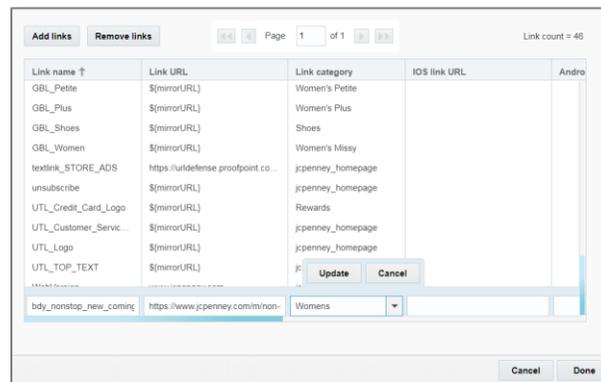
To add or update links in your Link Table in Responsys, you can either re-do your Link Table and upload as you did in the Process Doc step. Or if it's a one-off add to the Link Table, you can navigate to you campaign, More>, "Link Tracking"



On the pop-up window, select "Add Links"



Fill in the Link Name (your bdy tag), Link URL (bdy URL provided by site merchant), and Link Category. Click "Update".



Your new link is added. Repeat this process if you have more than one link you need to add. Remember to click "Done" when you're completely finished to save your work.

Questions or Concerns?

First, make sure to look through/find-search the Process Document to see if your question has already been answered. Then, ASK!!! That's the simplest and easiest way to get answers 😊

Hayley Tubb – Manager - Email Execution Team <htubb@Company.com>