Implementation Guide: Email Experience in Account Engagement

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ENHANCED EMAIL FOR ACCOUNT ENGAGEMENT

Connect to customers with emails that are easy to design on the Salesforce platform. After you build email templates or email content, customize them with HML merge fields. Then, choose whether to send an individual email or add it to a program in Engagement Studio. Streamline writing time by reusing email content, or send and resend email content to different segments. Tailor the send experience, and track email engagements to determine how well your email content is performing.

Prerequisites for Setting Up Enhanced Email

Using the enhanced email experience in Account Engagement relies on a few other features.

Using Email Templates and Email Content Together

With the enhanced email experience in Account Engagement, you can select an email template before you start building your email content. An email template is a reusable layout. It can help you boost productivity and encourage consistency among content creators, but it isn't a required component of an enhanced email send. It's your choice whether email templates are a good fit for your business processes.

Considerations for Designing and Sending Emails

Review these considerations before using the enhanced email experience in Account Engagement.

Set Up Enhanced Email in Account Engagement

To set up the enhanced email experience for interactive and engaging email design, we recommend that a Salesforce admin and an Account Engagement admin work together.

Design, Test, and Send Emails

Interactively design emails from scratch or from a template and send emails from the email content record. You can also preview and test your email before sending it.

Guidelines for Creating Custom Report Types for Email Content

Create custom report types that include email content and list email data. Marketers can then create reports to analyze and better understand the performance of their email content. Review the following guidelines and examples of reports.

Prerequisites for Setting Up Enhanced Email

Using the enhanced email experience in Account Engagement relies on a few other features.

To use enhanced email, Connected Campaigns and Handlebars Merge Language must be enabled. You must also have a verified Salesforce Connector. Find out more about these features.

- Connect Account Engagement Campaigns to Salesforce Campaigns
- Personalize Content with Handlebars Merge Fields
- Setting Up a Salesforce Connection for Accounts Purchased After February 11, 2019

If you need assistance navigating Marketing Setup or with other Salesforce basics, check out these trails and modules on Trailhead.

- Salesforce User Basics
- Navigate Setup

- User Management

Using Email Templates and Email Content Together

With the enhanced email experience in Account Engagement, you can select an email template before you start building your email content. An email template is a reusable layout. It can help you boost productivity and encourage consistency among content creators, but it isn't a required component of an enhanced email send. It's your choice whether email templates are a good fit for your business processes.

> **Note:** The email templates created in the Email Template Builder are used in Lightning Experience and Account Engagement Lightning App. Information about classic email templates is also available: Classic Email Templates

In Lightning, a template made in the Email Template Builder is a basic layout that contains default content. You can use it as a starting point for customizing future email messages, or send it as-is. An email content record contains metadata and content that's used for one or more email sends.

Email Templates

Usage: The Email Template Builder is available for use by Account Engagement, Sales Cloud, and Service Cloud users. In Account Engagement, you can select an email template as the basis for creating an email content record. Sales and Service users can send their templates in a few ways, such as in Sales Engagement or the docked composer.

Reporting: Standard reports for email templates include engagement metrics and usage. In Account Engagement, engagement metrics appear in the Email Content related list on an email template record.

Email Content

Usage: The drag-and-drop builder for email content is available in Account Engagement only. Email content records created in Account Engagement can't be shared to Sales or Service users.

Reporting: Engagement metrics for marketing emails appear in several places including the Email Sends related list, Engagement History, and List Email reports. You can review metrics on a specific send record or look at aggregate metrics on an email content record. Metrics for operational emails aren't included in the Email Sends related list or Engagement History.

> **Example:** Marketing manager Gina creates an event invitation template that provides space for a banner, logistical information, and RSVP button. For brand consistency, she adds her company's default header and footer. She names it Template: Event Invitations. Later, the event specialist, Kamal creates an email content record for an upcoming meet and greet at a local restaurant. When he starts building the email, he selects Gina's template to work from. He fills in specific content in each area: an image from their last meet-and-greet, the restaurant name, the event time and date, and the link to where he's tracking RSVPs.

> **Example:** A few sales reps tell Gina that they also want to invite people to the meet-and-greet. She and Kamal create another email template with the event information. They name this public template Event Invitation: July Meet-and-Greet. Now the finalized template appears to all the sales reps so that they can send it directly to their leads and contacts.

Considerations for Designing and Sending Emails

Review these considerations before using the enhanced email experience in Account Engagement.

Browsers and Edition Availability

- The enhanced email experience is available only in Account Engagement Lightning App.
- You can preview email in sandboxes, but you can't send test emails. To test the CMS image repository integration, deploy My Domain to the sandbox, and select the default CDN domain during channel setup.
- Support for managing and sending email content is limited in Developer Editions. Access to Salesforce CMS images and the ability to send an email aren't enabled.
- Internet Explorer 11 and Microsoft Edge aren't supported browsers for designing emails in this experience.

Email Content and CMS Management

- Users with the Manage Email Content user permission see all email content records. You can't filter or hide email content records.
- You can't delete an email content record with related sends.
- Email content records can't be recovered after deletion.
- To upload a CMS image when designing emails, a user must be a contributor to the associated CMS workspace.
- Developers can build custom Lightning Web Components to help bring third-party surveys, webinars, or other content into your emails.

Building and Tracking Emails

- You can edit the HTML Body field in the drag-and-drop editor only. The field isn't editable on the email content record or via the API.
- Pardot Merge Language (PML) variable tags aren't supported. Use Handlebars Merge Language (HML) merge fields instead.
- Account Engagement-only standard and custom fields are unavailable as HML merge fields. Use Salesforce standard and custom fields instead. Or, map your custom Account Engagement fields to Salesforce fields.
- The following tools aren't supported: folders, dynamic content, snippets, and A/B testing.
- The domain associated with the CMS channel is only visible to customers in image URLs and email source code.

Account Engagement Business Units

- When an email is sent or activated for automation, the campaign, list, sender, and reply-to options are based on the user's current business unit.
- Your CMS channel is related to one domain and used for all sends. If you have multiple business units, the same domain and channel is always used.
- Email content and templates ignore an asset's business unit assignment when tracking engagement. For example, if you send Business Unit A's form through an email connected to Business Unit B, we still attribute the form engagement to Business Unit A.

Images

- You can select images from a single Salesforce CMS channel only. Salesforce Files aren't supported and don't load when emails are sent.
- Always use a publicly available, absolute URL for your links.
- SVG images, JavaScript, and other active content aren't supported in email content.

Email Templates

- To select an email template for use with email content, make sure that the template doesn't contain Salesforce Files. Also, the related entity type must be Lead, Contact, or None.
- Enhanced letterhead isn't supported for email templates built in the Email Template Builder.
- When you change the email template on the email content record, the Subject and HTML Body fields are overwritten with the template values. These two field values remain if you remove the template later, but don't replace it.
- We recommend that you avoid including Account Engagement-only merge fields, such as Email Preference Center, in an email template. When Sales or Service users select an email template to send to a lead or contact, the merge fields break.
- You can't create via API an email template that uses the enhanced sending experience.
- Tags aren't supported in the Email Template Builder.

Allocations

- The maximum character allowance for the HTML Body and Text Body fields is 384,000 characters.
- You can send a test email to a maximum of 10 test lists of 100 recipients each. Or, you can send a test to up to 50 individual addresses.
- If you exceed the character limit for an HTML component, try splitting the content into two HTML blocks.

Set Up Enhanced Email in Account Engagement

To set up the enhanced email experience for interactive and engaging email design, we recommend that a Salesforce admin and an Account Engagement admin work together.

> **Note:** Access to workspaces and channels in Digital Experiences is included with any Salesforce edition that supports Account Engagement.

1. Assign Admin Permissions for Enhanced Email

   Make sure that the person configuring enhanced email in Account Engagement has the appropriate access. You can quickly create a permission set with the necessary permissions on the Content Setup page. A Salesforce admin is best equipped to assign the permissions that are required.

2. Create a Domain for Enhanced Email

   When we store the images that you use in your emails, we associate them with a domain that you manage. Enhanced email requires a domain that's configured using a content delivery network (CDN) over HTTPS. Select any verified domain that meets that criteria.

3. Configure Digital Experiences for Enhanced Email

   When you send enhanced email with Account Engagement, you can use the Digital Experiences app as a unified image repository. Digital Experiences offers a CMS workspace where you can save files and control user access and a CMS channel where those files can be published. When you use Digital Experiences with enhanced email, the images published to your channel become available while marketers are building emails.

4. Assign User Permissions for Enhanced Email

   To give users access to the Email Content object and to Salesforce Digital Experiences, assign permissions. A Salesforce admin is best equipped to assign the required permissions.

5. Enhanced Email Experience Permissions

   Various permissions are necessary to set up, create, and send enhanced email from Account Engagement.

Assign Admin Permissions for Enhanced Email

Make sure that the person configuring enhanced email in Account Engagement has the appropriate access. You can quickly create a permission set with the necessary permissions on the Content Setup page. A Salesforce admin is best equipped to assign the permissions that are required.

1. From Marketing Setup, in the Quick Find Box, enter `Content`, and then select **Content Setup**.

2. To create the necessary permission set, click **Create Permission Set** and save.

3. From Setup, click **Manage Assignments**.

4. On the permission set page, click **Manage Assignments** again.

5. To select the admin user who configures email, click **Add Assignments**.

6. Select a user, and then click **Assign**.

7. For easy access to Salesforce Digital Experiences, add the CMS Workspaces and CMS Channels tabs to your Account Engagement Lightning App toolbar.

Create a Domain for Enhanced Email

When we store the images that you use in your emails, we associate them with a domain that you manage. Enhanced email requires a domain that's configured using a content delivery network (CDN) over HTTPS. Select any verified domain that meets that criteria.

You have three choices when selecting a domain.

- Your Salesforce My Domain

- An existing custom domain that uses a content delivery network (CDN) over HTTPS

- A new domain

To verify a new domain, complete these steps.

1. Review the considerations for the Salesforce CDN.

2. Complete the prerequisites for a custom domain and the prerequisites for the Salesforce CDN.

3. Set up a custom domain that uses the Salesforce CDN.

Configure Digital Experiences for Enhanced Email

When you send enhanced email with Account Engagement, you can use the Digital Experiences app as a unified image repository. Digital Experiences offers a CMS workspace where you can save files and control user access and a CMS channel where those files can be published. When you use Digital Experiences with enhanced email, the images published to your channel become available while marketers are building emails.

Digital Experiences contributors must have the Salesforce user license.

📝 **Note:** Digital Experiences can be used with enhanced email and landing page experiences.

1. Click the Digital Experiences Home action menu, select **CMS Channel**, choose a Public Channel, and then click **Create Channel**.

   Using a public channel ensures that you can delete the Pardot package in the future.

2. Name the channel something descriptive, such as Email Content or a business unit name, and then save it. You can edit the channel name at any time.

3. To configure a channel's domain, edit the channel.

   a. From the channel list, click the action menu, and then select **Edit**.

   b. Select **Enable Domain**, choose the domain you configured from the dropdown, and then save.

4. Click the Digital Experiences Home action menu, select CMS Workspace, and then click **Add Workspace**.

5. To configure your workspace, follow the prompts.

   a. Name the workspace and select the channel you want to include.

   b. Select the Salesforce users that need access to the workspace, and then select a role for each.

      A content manager has full access to a workspace's files. A content admin can also edit the workspace settings.

   c. Select the languages you want to support and include a default language.

   d. Review your settings, and then click **Done**.

6. From the Content Setup page, click **Select Channel**, choose the one you created from the dropdown, and save.

Assign User Permissions for Enhanced Email

To give users access to the Email Content object and to Salesforce Digital Experiences, assign permissions. A Salesforce admin is best equipped to assign the required permissions.

1. From Marketing Setup, in the Quick Find box, enter `Content`, and then select **Content Setup**.

2. Click **Manage Assignments**.

3. On the Create Account Engagement Content permission set page, click **Manage Assignments**.

4. Click **Add Assignments**, and then select the users who need the permission set.

5. Click **Assign**.

6. For easy access to files, encourage users to add CMS Workspace and CMS Channel tabs to their navigation.

    a. Open the Account Engagement Lightning App.

    b. To edit tabs, click ✎ on the navigation.

    c. Click **Add More Items**.

    d. With **All** selected, search for CMS and select **CMS Workspaces** and **CMS Channels**.

    e. Click **Add 2 Nav Items** and save.

To allow a non-admin user to create workspaces and channels in the Digital Experiences app, assign the user the Create CMS Channels and Workspaces system permission.

Enhanced Email Experience Permissions

Various permissions are necessary to set up, create, and send enhanced email from Account Engagement.

Pardot is now known as Marketing Cloud Account Engagement. We wish we could snap our fingers to update the name everywhere, but you can expect to see the previous name in a few places until we replace it, including in the app itself.

Permission Sets and User Roles

An admin can create and assign the Create Account Engagement Content permission set on the Content Setup page in Marketing Setup. The permission set includes access to the drag-and-drop builder, the ability to manage email content, and access to Salesforce CMS (Content Management System) and its Channels and Workspace tabs.

To preview, test, or send an email, users must also have a Marketing user role in Account Engagement, or the individual permissions indicated in the table.

Individual Permissions

Permission Name	Location	Type	Description	Configuration
Access Drag and Drop Content Builder	Salesforce Setup	System Permissions	Provides access to the email content editor in Account Engagement Lightning App	On

Permission Name	Location	Type	Description	Configuration
Activate Email for Automation	Salesforce Setup	System Permissions	Allows users to make an email content record available in Engagement Studio	Optional
Manage Email Content	Salesforce Setup	System Permissions	Allows users to create, edit, and delete email content	On
Create CMS Workspaces and Channels	Salesforce Setup	System Permissions	Allows non-admin users to create channels and workspaces in Salesforce CMS	Optional
View Setup and Configuration	Salesforce Setup	System Permissions	Allows users to add custom components to enhanced email templates	Optional
Salesforce CMS (standard__SalesforceCMS)	Salesforce Setup	App Assignments	Provides access to Salesforce CMS	On
CMS Channels	Salesforce Setup	Object Settings	Makes the CMS Channels tab available for selection in Account Engagement Lightning App	Available, Visible
CMS Workspaces	Salesforce Setup	Object Settings	Makes the CMS Workspaces tab available for selection in Account Engagement Lightning App	Available, Visible
Prospects	Account Engagement Settings, User Roles	Prospects tab	Provides access to prospect record data	View
Campaigns	Account Engagement Settings, User Roles	Marketing tab	Provides access to Account Engagement campaigns data	View
Emails	Account Engagement Settings, User Roles	Marketing tab	Provides access to enhanced emails and sending pipeline	Create/Edit, Send to List
Segmentation Lists	Account Engagement Settings, User Roles	Marketing tab	Provides access to segmentation lists	View

Design, Test, and Send Emails

Interactively design emails from scratch or from a template and send emails from the email content record. You can also preview and test your email before sending it.

Considerations for Using HML Fields for Emails in Lightning
Some HML merge fields in Salesforce aren't supported in Account Engagement. To use these field values, map custom fields from Account Engagement to existing Salesforce fields. Keep these scenarios in mind when using HML fields in the enhanced email experience.

Create Enhanced Emails
Provide basic email information to create an email content record, and then build from scratch or edit existing email content. To make email creation even easier, Account Engagement offers email templates that help you reuse email designs.

Preview and Test Emails
Before sending your email, preview it as a specific prospect, and then test send it to troubleshoot personalization issues. You can send a test email to a test list or to individual email addresses. Test emails don't include merge field data.

Send Emails
After you design your email content, define a campaign, an audience, tracker domain, sender options, and completion actions.

Reuse Email Content for List Emails
Edit and reuse existing email content to create and send new emails. Resend email content to different recipients and segments as unique list email sends. You can also view related email sends for specific email content.

Considerations for Using HML Fields for Emails in Lightning

Some HML merge fields in Salesforce aren't supported in Account Engagement. To use these field values, map custom fields from Account Engagement to existing Salesforce fields. Keep these scenarios in mind when using HML fields in the enhanced email experience.

Account Engagement-only custom fields aren't available for selection in email content.

Field Scenario	Is the field available for selection in the builder?	Syntax is the Same Between Salesforce and Account Engagement Fields	Data displayed in the merge field when the email sends
Salesforce and Account Engagement both have the field by default	Yes	Yes	The email displays the field data in Account Engagement
Account Engagement custom field is synced to a Salesforce default field	Yes	Yes	The email displays the field data in Account Engagement
Account Engagement custom field is synced	Yes	Yes	The email displays the field data in Account Engagement

Field Scenario	Is the field available for selection in the builder?	Syntax is the Same Between Salesforce and Account Engagement Fields	Data displayed in the merge field when the email sends
to a Salesforce custom field			
Field is only in Salesforce as a default or custom field	Yes	N/A	Unable to send the email in lightning
Field is only in Salesforce as a default or custom field but has the same field name as an Account Engagement field	Yes	Yes	The email displays the field data in Account Engagement

Create Enhanced Emails

Provide basic email information to create an email content record, and then build from scratch or edit existing email content. To make email creation even easier, Account Engagement offers email templates that help you reuse email designs.

The email Subject and HTML Body field content is automatically copied from the template that you select.

1. From the Email Content tab, click **New**.

2. Enter an email name for internal use.

3. To begin from an email template, select a template.
   Only email templates created from the email template builder are available for selection.

4. Save your work.

5. To add components and customize your content, click **Edit in Builder**.

6. Click a component from the list and drag it to the canvas where you want the component to appear.
   An editing pane appears where you can add content and style fields.

7. After you add your content, save your work.

To work with the text-only version of your email, edit the email content record. In the Text Body field, enter new text, or click **Sync from HTML** to use the text that you added in the builder.

USER PERMISSIONS

To build an email:
- Manage Email Content

  AND

  Access Drag-and-Drop Content Builder

To add custom components in email templates:
- View Setup and Configuration

Preview and Test Emails

Before sending your email, preview it as a specific prospect, and then test send it to troubleshoot personalization issues. You can send a test email to a test list or to individual email addresses. Test emails don't include merge field data.

Data from email sends to test lists is included in Engagement History and other reports. To exclude test list metrics, associate your test email with a test campaign.

1. Navigate to the email content record for the email that you want to preview or test.

2. From the dropdown, select **Preview As**, and then select a prospect.

3. From the dropdown, select **Test**.

4. Define the recipients.

   - Select a list from the dropdown menu.

   - Type in or search for individual recipients, and press Enter or Tab to add the email address.

Send Emails

After you design your email content, define a campaign, an audience, tracker domain, sender options, and completion actions.

You can send an email content record as many times as needed. Send it immediately or schedule it for later. Account Engagement Premium and Advanced users can also choose to send with Einstein Send Time Optimization.

1. Test your email thoroughly and verify that all text, images, and links appear and work as expected.

2. In the email content record's action menu, click **Send**.

3. Enter the required values, such as campaign, recipient list, and sender information.

4. To configure completion actions, enable a trigger type and then, select the action.

5. Select **Send Now** or **Send Later**.

   If you select Send Later, enter a date and time for sending.

6. Click **Send**.

Reuse Email Content for List Emails

Edit and reuse existing email content to create and send new emails. Resend email content to different recipients and segments as unique list email sends. You can also view related email sends for specific email content.

1. From the Email Content tab, select an email content record to resend or edit.

2. Edit the email information and content from the record, or click **Edit in Builder** to add components and customizations.

   Editing an existing email content record changes the content for that record. It doesn't change previously sent emails or create a unique email content record.

3. Click **Send** from the record and define recipients, campaign association, and completion actions.

   Each email sent creates a new send record and relates it to the email content record.

You can view list emails sent from an email content record on the Related tab of the record.

Guidelines for Creating Custom Report Types for Email Content

Create custom report types that include email content and list email data. Marketers can then create reports to analyze and better understand the performance of their email content. Review the following guidelines and examples of reports.

To learn how to create custom report types, see Create a Custom Report Type.

- To create reports that pull data from the email content record, select Email Content as the primary object on the custom report type. With Email Content as the primary object, marketers could create a report for all engagement statistics by email content record.

- To get more report options for all list emails including emails sent from the email content record, add list email as a related object on the custom report. With Email Content and List Email as objects on the report, marketers could create a report that shows all email sends and related statistics by email content record.

- With List Email as the primary object, marketers could create a report with email sends and related statistics for a given campaign.