Marketing Cloud Journey Builder Implementation Guide

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JOURNEY BUILDER IMPLEMENTATION GUIDE

Journey Builder is the Marketing Cloud's primary platform for sending messages and designing multi-step marketing journeys. It's the single stop for messaging and includes everything you need for marketing orchestration. Journey Builder's foundation is the journey, which is the customer communication plan a marketer designs, from sending a single message to activating and managing sophisticated marketing campaigns.

Who This Guide Is For

This guide is for Marketing Cloud admins, partners, and developers to implement Journey Builder.

Before You Start

Review the Journey Builder Prerequisites and Contact Builder help pages for information about account provisioning and other setup tasks.

Journey Builder supports these Marketing Cloud editions.

Edition	Compatibility	Known Issues	MC Connect Considerations
Core / Advanced	Yes	None	- Required Version: Marketing Cloud Connect/V5 - Multi-org support: N/A
Enterprise 1.0	- Parent Account: No - On Your Behalf (OYB) Accounts: No - Lock & Publish Accounts: Yes	- Sending from the top level of Enterprise 1.0 is not supported - Sending from OYB account is not supported	If the customer has multiple Enterprise 1.0 Lock & Publish accounts connected to a Salesforce org, Journey Builder does not support the Salesforce Event as an entry source.
Enterprise 2.0	Yes	Cannot copy journeys from parent business units to child business units	- Required Version: Marketing Cloud Connect/V5 - Multi-org support: N/A

SEE ALSO:

Journey Builder Roles

SET UP JOURNEY BUILDER

Make sure that you know how customer data enters the Marketing Cloud system and how it is stored in Contact Builder. Review these considerations and prerequisites before setup.

Considerations Before You Begin

- Review and complete Journey Builder Prerequisites.
- Is your customer data in the Marketing Cloud and ready to use? Make sure that you know how customer data enters the Marketing Cloud system and is arranged in Contact Builder. See the documentation on imports and contacts if you need clarification on the best way to structure your data. Data necessary for personalization and decision logic must be referenceable either in AMPscript or personalization strings. It is important to be aware of the differences in Journey Data and Contact Data, and how the two impact personalization differently.
- Is your data ready for journey launch? If you are using data extensions, are your data extensions sendable? Is the audience pre-filtered to a target population? If you plan to use contact data for decisions in the journey, is the data extension where the data is stored linked to Contact Builder? This linking is not required for the entry source data extension if only when the journey uses journey data only.

Journey Builder Entry Sources and Activities

The entry source tells Journey Builder where customers entering this journey come from. A canvas activity is the message action, decision, or update—or a combination of these elements— that impact contacts until they reach a goal or the endpoint of the journey. Use the links included here to learn more.

Journey Versions and Copies

Versions allow the marketer to revise a running journey without interrupting the population currently in the journey. Copy a journey to retain its entry source, goal, and activity flow in a new draft.

More Journey Builder Features

Use a template to access pre-built journeys, reuse activities and activity groups, and make sure that your journey is ready before activation. Find out more about building and verifying your journeys, and how they use data.

SEE ALSO:

Journey Builder Entry Sources and Activities

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- Entry Sources
- Canvas Activities

SEE ALSO:

>   Activity Types
>   Create Custom Activities

Journey Versions and Copies

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- Journey Versions
- Copy a Journey

More Journey Builder Features

Use a template to access pre-built journeys, reuse activities and activity groups, and make sure that your journey is ready before activation. Find out more about building and verifying your journeys, and how they use data.

- Journey Templates
- Reuse Journey Activities
- Validate Your Journey
- Journey Testing
- Organize Your Journeys

How Journeys Use Data

- Journey And Contact Data
- Using Linked Data Extensions in Journey Builder
- Attribute to Attribute Comparison

JOURNEY BUILDER USE CASES

Set up a two-step drip campaign that welcomes customers. This use case covers creating data extensions and journey configuration for a simple welcome email series. But you can configure Journey Builder to set up any kind of journey. Adjust this use case to suit your data structure and personalization needs. For a more detailed overview of contact setup in Contact Builder, check out the Contacts implementation guide.

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Create a Welcome_Email Data Extension
Create a sendable standard data extension called Welcome_Email.

Create a Coupon_Offer Data Extension
In addition to the Welcome_Email data extension, create a sendable standard data extension called Coupon_Offer.

Get Data into Contact Builder
If the journey uses up-to-date contact data during the journey, use these guidelines. If the journey uses journey data only, contact data does not need to be linked. In this use case, linking the data extensions to contact data is not necessary.

Build Journey Emails
You can create the emails that the journey sends in Content Builder or in Journey Builder. This use case includes a simple sample email, but your journey can send any email in your account.

Create the Journey
Now, create a journey from scratch that sends emails to Marketing Cloud contacts in the data extension that you created.

Set Up the Entry Source
Use the data extension entry source to select the Welcome_Email data extension. For this use case, we schedule it to run only once. When you activate the journey, contacts stored in the Welcome_Email data extension enter the journey.

Configure Activities
Drag the email activity onto the canvas once for the Welcome_Email message and once for the Coupon_Email message. Allow the default one day wait to occur between them.

Configure Journey Settings and Activate
Specify that the journey does not allow contacts to re-enter after leaving for this use case, then test, validate, and activate.

Create a Welcome_Email Data Extension

Create a sendable standard data extension called Welcome_Email.

To execute a journey, data must enter the Marketing Cloud. Use the instructions on the Create a Data Extension page to set up a data extension for journey use.

- Use Welcome_Email as the external key.
- For your first field, in the Name column, type SubscriberKey.
- For the SubscriberKey data type, select **Text**.
- Set the Primary Key = Y and the Nullable field = N.
- For the second field, enter EmailAddress.

- For the EmailAddress data type, select **Email Address**.
- Set the Primary Key = N and the Nullable field = N.
- Under **Send Relationship**, set SubscriberKey relates to Subscriber Key.

SEE ALSO:

Create a Data Extension in Contact Builder

Create a Coupon_Offer Data Extension

In addition to the Welcome_Email data extension, create a sendable standard data extension called Coupon_Offer.

Use the instructions on the Create a Data Extension page to set up a data extension for journey use.

- Use Coupon_Offer as the external key.
- For your first field, in the Name column, type SubscriberKey.
- For the SubscriberKey data type, select **Text**.
- Set the Primary Key = Y and the Nullable field = N.
- For the second field, enter EmailAddress.
- For the EmailAddress data type, select **Email Address**.
- Set the Primary Key = N and the Nullable field = N.
- For the third field, enter Date.
- For the Date data type, select **Date**.
- Set the Primary Key = N and the Nullable field = Y
- For the Default Value, select **Current Date**.
- Under **Send Relationship**, set SubscriberKey relates to Subscriber Key.

SEE ALSO:

Create a Data Extension in Contact Builder

Get Data into Contact Builder

If the journey uses up-to-date contact data during the journey, use these guidelines. If the journey uses journey data only, contact data does not need to be linked. In this use case, linking the data extensions to contact data is not necessary.

- If one does not exist for your journey data extensions, you can create an attribute group with a name such as Welcome Journey. Alternately, you can filter journey data extensions using Automation Studio or another process.
- Link the Welcome_Email data extension to Customer Data.
- Set the Contact Key to the Subscriber Key as a 1:1 relationship.

SEE ALSO:

Create an Attribute Group in Contact Builder
Link Data Extensions in Contact Builder

Build Journey Emails

You can create the emails that the journey sends in Content Builder or in Journey Builder. This use case includes a simple sample email, but your journey can send any email in your account.

Create a text-only email called Welcome_Email and a text-only email called Coupon_Email. Use this sample text as a guide.

```
Welcome to Journeys!


Update Your Profile: %%profile_center_url%%This email was sent by:
%%Member_Busname%%
%%Member_Addr%%
%%Member_City%%, %%Member_State%%, %%Member_PostalCode%%, %%Member_Country%%
```

SEE ALSO:

[Create Emails in Content Builder](#)

Create the Journey

Now, create a journey from scratch that sends emails to Marketing Cloud contacts in the data extension that you created.

Give the journey a name such as Welcome_Journey.

Set Up the Entry Source

Use the data extension entry source to select the Welcome_Email data extension. For this use case, we schedule it to run only once. When you activate the journey, contacts stored in the Welcome_Email data extension enter the journey.
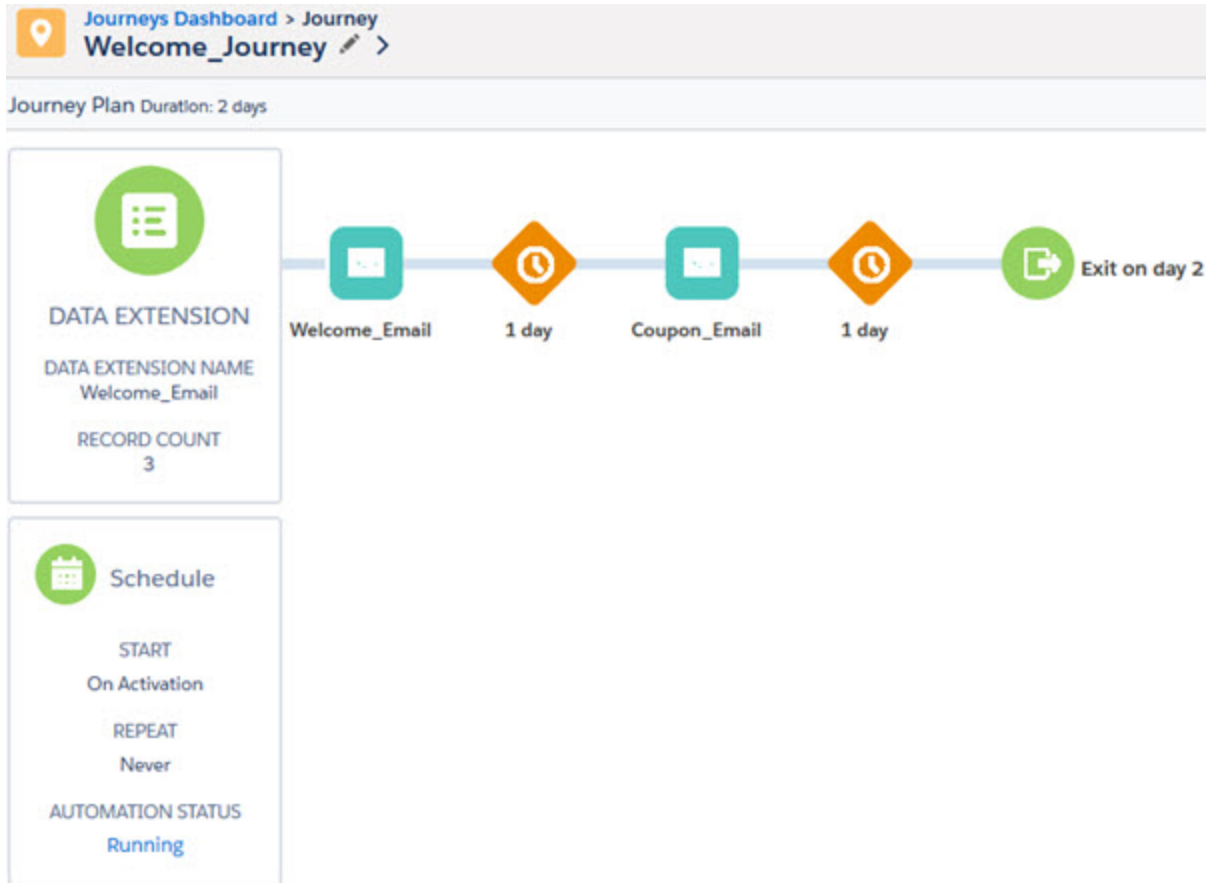
SEE ALSO:

[Schedule a Data Extension Entry Source](#)

Configure Activities

Drag the email activity onto the canvas once for the Welcome_Email message and once for the Coupon_Email message. Allow the default one day wait to occur between them.

Use the instructions on the Configure the Email Activity page, choosing the Select Message option and selecting Welcome_Email. Repeat the same steps for the Coupon_Email message.

SEE ALSO:

    Configure the Email Activity

Configure Journey Settings and Activate

Specify that the journey does not allow contacts to re-enter after leaving for this use case, then test, validate, and activate.

1. Use the instructions on the Journey Settings help page to find and configure journey settings.

2. Select **No re-entry**.

3. Select **Use Email Address from Entry Source Only**.

4. Validate and test your journey.

5. Click **Activate**.

SEE ALSO:

    Journey Settings

    Validate a Journey in Journey Builder

    Configure a Journey Test with a Data Extension

JOURNEY BUILDER IMPLEMENTATION BEST PRACTICES

Many factors impact Journey Builder's performance, including journey optimization, complexity of contact model in Contact Builder, quantity of customers, and database resource availability.

Performance and Sending Best Practices

Journeys share resources for processing. Review Journey Builder performance and sending optimization guidelines on the Optimize Journey Builder Performance help page.

Reporting and Analytics Best Practices

Find Journey Builder analytics in any running journey. Query data views for journey-related data, and find reports in the Reports tool. Schedule reports to run no more than once per four hours.

Performance and Sending Best Practices

Journeys share resources for processing. Review Journey Builder performance and sending optimization guidelines on the Optimize Journey Builder Performance help page.

- How to Optimize Journey Builder Performance

SEE ALSO:

How to Optimize Journey Builder Performance

Reporting and Analytics Best Practices

Find Journey Builder analytics in any running journey. Query data views for journey-related data, and find reports in the Reports tool. Schedule reports to run no more than once per four hours.

Reporting

- Requesting 30 days of activity or less in a report is recommended.
- You can write a query against any data extension or data view provided in the system. Use the SQL query activity to write queries against journey-related data views.

Analytics

- To open the analytics dashboard and access aggregate email engagement metrics, click **Analytics** in a running journey.

- You can click an activity in a running journey to access performance metrics for that activity.

SEE ALSO: