

# 1110-eT: CDC MarketFirst Power Users

## Overview

This online course, taught over 5 days in daily three-hour sessions, delivers advanced skills training in eMarketing program design using CDC MarketFirst through hands-on experience and in-class discussion. You will learn how to improve the appearance of documents, test and distribute email messages, manage leads, produce documents in multiple languages, and design registration programs. For more information please send your inquiries to [education@pivotal.com](mailto:education@pivotal.com).

## Audience

All MarketFirst users – both technical and non-technical.

## Prerequisites

**Required:** Course **1100-eT: CDC MarketFirst Essentials**

For participants interested with the CDC MarketFirst Integration with Pivotal CRM, knowledge using the Pivotal CRM product.

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## Topics Covered

### Create Documents in Multiple Languages

- Describe MarketFirst multiple language support.
- Create a multiple language campaign.

### Formatting Email Documents

- Create separate HTML and text sections for email messages.
- Format URLs in HTML email sections.
- Format text URLs in text email sections.

### Formatting Web Documents

- Design document sections.
- Work with form fields and question blocks.
- Create custom submit buttons.

### Managing Web Page Access

- Using Security Controls to restrict access to MarketFirst Web pages.

### Testing Email Documents

- Identify best practices in testing email messages.
- Use test lists.
- Re-launch Send Document tasks.
- Test against control groups.

### Managing eMail Distribution

- Manage lists and segments for email distribution.
- Restrict email sends to new customers.
- Set schedules for email distribution.
- Manage email replies.

### Identifying Lead Sources

- Use hidden fields to identify lead sources.
- Use URL parameters to identify lead sources.
- Use Assign value tasks to identify lead sources.

### Defining Lead Relationships

- Create a profile for role holders.
- Create a profile for related contacts.
- Define relationships between profiles

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### Topics Covered, Cont'd.

#### Automating Lead Distribution

- Automatically assign relationships between sales representatives and sales leads.
- Automatically distribute lead information to sales representatives.
- Run reports and segments to view sales leads.

#### Managing Registration Requests

- Manage multiple registrations.
- Send email confirmations.
- Send email reminders.

#### Setting Registration Limits

- Use counters to track registration numbers.
- Manage registration time frames.
- Use variables within MarketFirst documents.

#### Using External Content in Documents

- Use External Content Blocks.
- Include Inline Text.
- Use static requests.
- Use dynamic requests.

#### Automatically Linking Programs

- Set up user events within single programs.
- Set up user events across many programs.
- Transfer contacts among workflows with user events.

#### CDC MarketFirst Integration with Pivotal CRM

- Manage Enrollment.
- Create Target Lists.
- Using CRM Content Blocks