

# My user is unable to send an email or Run a Data Extension.

## What should I do?

When your user can't send an email, we know time is of the essence in addressing the issue. Often, the root cause is something over which you have control rather than a systemic failure in Salesforce or Marketing Cloud.

When faced with a failed send, a send to 0 or failed Data Extension, review the items below.

### Salesforce: Confirm User Access

#### 1. Review the Location of the Report

**TIP!** Send the user a link to the Report. If they get an 'Insufficient Privileges' they do not have access to the Report.

- a. Is the report saved in the correct Salesforce **folder**?
  - i. Reports saved in a **Private Folder** cannot be used for sending.
- b. Is the **folder shared with the user/public group**?
  - i. If shared with a public Group, check the user's license record to confirm they are part of that group. If not, @Melanie Jones.
  - ii. For immediate troubleshooting, share the Folder with the individual user.

#### 2. IF, the Report is based on a Campaign, review the Location of the Campaign

**TIP!** Send the user a link to the Report. If they see 0 contacts, they do not have access to the Campaign. OR send the user a link to the Campaign. If they see 'Insufficient Privileges' they do not have access to the Campaign.

- a. Is the Report based off of a **Campaign**? If so, confirm the Campaign has been shared with the user/public group.

#### 3. Review the Content of the Report

- a. Does the Salesforce report contain a column with **Contact ID**? If not, the send will fail.
- b. Reports with a **Unique Count** (usually applied to the Contact ID Column) will fail.

### Marketing Cloud

Some send issues in Marketing Cloud are related to errors in access to Salesforce reports and/or campaigns (discussed above) or errors within email content.

#### Email Content

##### 1. Confirm that the Data Extension Settings are Correct

- a. Go to Subscribers >> Salesforce Data Extensions >> Select Name
- b. Verify that Contact ID = Key
- c. Verify that any email address = Email Address

##### 2. Confirm that the Data Extension is Populating Records

- a. Go to Subscribers >> Salesforce Data Extensions >> Select Data Extension >> View Data

### 3. Send a Test Email

- c. Can you send a successful test to yourself by navigating to Email >> Preview & Test?
  - i. If there is a problem with your email, such as with incorrect data tags (see below) or spam triggers, you will receive an error message informing you of what needs to be corrected.

### 4. Review your Data Tags

- a. Incorrect formatting of data tags will result in failed sends. To avoid this problem, we recommend that all eComm users and eComm Specialists select data tags from the options available in Content Builder rather than typing it into the email copy. If you find an error with the formatting of data tags, correct it in **both the HTML and Plain Text versions** of your email.

- i. Correct Format Example: %%First Name%%
- ii. Incorrect Format Examples: %% FirstName %%, %% First Name %%, %%First\_Name%%, %% First\_Name %%

- b. **Tip! Quickly check by looking in the test and preview**

The screenshot shows the Salesforce Email Studio interface. At the top, there's a navigation bar with 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', 'A/B Testing', 'Tracking', and 'Admin'. Below this is the 'Edit Email' section for 'Compliance Survey 2023-01-17'. The 'Preview and Test' tab is selected. A red error banner at the top of the preview area states: 'The subscriber preview failed to generate. Review the details, correct all issues, and try again.' Below this, there are two sections: 'HTML Version' and 'Text Version'. Both sections show a 'Personalization error: The personalization string "%surveylink0117%" was not found in the following data extension(s). To fix the problem, please try the following: - Make sure that there is not a space or typo within the personalization string in your email. For example, check that the field containing the personalization string value is in all data extensions used. - Correct the HTML Body of your email.' The preview area shows a contact list on the left with fields like Contact ID, Employee Preferred Name, First Name, Last Name, UCD Email, Campaign Name, Survey URL Test, and a 'TAKE SURVEY' button on the right.

## Sharing Settings

### 4. Review Report Location, Sharing Settings, and Report Content

**TIP!** If your user is sending to a report, try converting the report to a data extension instead. Ask your user to send again; if the send still fails, review the steps below

.Have you already reviewed steps one through three in the Salesforce section above? If no, start there before beginning the steps below.

## Data Extension

1. **Can your user Start a data extension import successfully?**
  - a. If no, review items two and three below. Also confirm that the data extension is set to notify the user when the import is successful or when it fails.
2. **Does your user have access to Select Audiences?**
  - a. Can your user select Reports, Campaigns, and Data Extensions while in **Guided Send** or **Salesforce Send Email**? If no, ask Melanie Jones to [confirm user permissions](#).
  - b. Inability to select audiences can also be related to service issues with Stack 7. You can wait awhile for the issues to be resolved and then attempt another send.
3. **Review Sharing Settings**
  - a. See Salesforce section above.

If your user is sending to a data extension and the above steps do not solve the problem, try recreating the data extension. This has solved the problem in some cases.

For the sake of getting the email out the door, an eComm specialist can try to send the email. If the message then sends, please submit a ticket so we can troubleshoot in advance of the user's next send.

If you have reviewed all of the items above and your user's sends are still failing, your best option is to submit a ticket. Please provide **Business Unit MID**, **Failed Send ID**, **Username of Sender** and other relevant details.