Need eComm Help? Start Here. [1]

November 4, 2019 by jennifer.mortensen [2]

Click on the name of the tab below that matches the eComm category with which you require assistance:

- Salesforce
- Marketing Cloud
- Cvent
- eComm Specialists / Super Users

Now, click the + symbol next to the category that best describes your question to view available resources.

Note that items followed by a * can only be completed with the help of your eComm Specialist [3].

Training

- What is Salesforce? Where can I get an overview? [4]
- What Salesforce new user training is offered? [5]
- Quarterly Release Notes [6]
- **2023 Preference and Business Unit Optimization** [7]

Campaigns

- What is the difference between a campaign and a report? [8]
- What is the relationship between campaigns, reports, and data extensions? [9]
- How are campaigns connected to reports? [8]
- Why do campaigns have such complicated names? [10]
- How do I create a Salesforce campaign? [11]
- How do I modify or delete a campaign? [12]
- How do I add an individual contact to a Salesforce campaign? [11]
- How do I add contacts to a Salesforce campaign in bulk? [13]*
- Why can't I see a certain campaign? [14]

- How do I share a campaign with another user? [14]*
- How do I share a campaign with a public group? [14]*

Chatter

- How do I post in Chatter? [15]
- How do I set my Chatter notifications? [15]
- Why am I not seeing all of my Chatter posts? [15]

Contacts

- How do I view a contact? [16]
- What is the difference between a Standard Contact and an Individual Contact? [17]
- How do I modify information on a contact (such as the email address)? [18]
- Why are there duplicate contact records? [19]
- How to I merge two or more contacts? [19]*
- How do I add a contact to a Salesforce campaign? [11]
- What are individual email results (IERs) and how can I use them? [20]
- How do I add contacts to Salesforce? [21]*
- How can I match new contacts against existing contacts to avoid creating duplicates? [13]*
- How will I know if a contact received my email? [20]
- How does a Salesforce contact relate to a Marketing Cloud Subscriber? [22]
- Is Salesforce GDPR compliant? [23]
- Understanding FERPA Flags [24]

Data

- What is eComm's data model? [25]
- What contacts exist in Salesforce? [25]
- Does Salesforce integrate with other CU data sources? [25]
- Is there an Entity Relationship Diagram(ERD)? [26]
- Is there a data dictionary? [27]
- Understanding FERPA Flags [24]
- Understanding Preferred Name [28]
- GeoCode Sunetting in 2023 [29]

Dashboards

- How would I view my Business Unit's email send data via a dashboard? [30]
- I want a dashboard for my email sends like the one on the Salesforce homepage. How do I create one? [31]*
- How do I view a Salesforce dashboard? [30]
- How do I filter a Salesforce dashboard? [30]
- How do I refresh a dashboard to be sure the data is current? [30]
- How do I subscribe to a Salesforce dashboard? [30]
- Why can’t I see a Salesforce dashboard? [14]

Email Preferences

- How do constituents manage their own email preferences? [32]
- How do I opt a contact out of all emails or specific email preferences? [33]*
- How do I opt a contact back in to all emails or specific email preferences? [33]*
- How do I change the name of an existing email preference? [34]*
- How do I create a new email preference? [34]*
- How do I respect a constituent's email preferences? [35]
- How do eComm specialists respect a constituent's email preferences? [36]*

Email Sends

- How do I view email send data in Salesforce? [37]

Events

- How do I locate my Cvent event in Salesforce? [10]
- How do I view event participation in Salesforce? [38]
- Why is my event campaign name so long in Salesforce? [10]

Folders

- How do I share folders and subfolders? [39]*

Integrations

- How are Marketing Cloud, Cvent and Salesforce integrated with one another? [25]
- How are CU's data sources integrated with Salesforce? [25]
- How does the Cvent-Salesforce integration work? [40]
- How can I find my Cvent event in Salesforce? [40]
- How can I get event guests added to Salesforce? [41]
- How can I track event attendees to get the most out of the Cvent-Salesforce integration? [42]
- GeoCode Sunetting in 2023 [29]

List Views

- What is a list view and how can it help me? [43]
- How do I create new list view or clone an existing one? [43]
- How do I switch between different list views? [43]
- How do I pin a list view? [43]

Logging In

- What is the login URL for Salesforce? [44]
- How do I reset my Salesforce password? [44]
- I am not receiving Marketing Cloud's identity validation email. What should I do? [45]

Notifications (Chatter)

- How do I post in Chatter? [15]
- How do I set my Chatter notifications? [15]
- Why am I not seeing all of my Chatter posts? [15]

Quarterly Release Notes

- Quarterly Release Notes [6]

Reports

- How do I build Salesforce reports? [46]*
- What is the difference between a campaign and a report? [8]
- What is the relationship between reports, campaigns, and data extensions? [9]
- Why do reports have such complicated names? [10]
- How do I request a new report? [47]
- How do I modify an existing report? [46]*
- What data can I use to build audience reports? [48]
- How do I view a report? [49]
- Reporting on Preferred Name.* [50]
- How do I share a report with another user? [14]*
- How do eComm specialist create Reports with CAN-SPAM compliance? [36]*
- GeoCode Sunsetting in 2023 [29]

Subscriptions

- Is there a way for me to grow my audience? [51]
- Can folks subscribe to receive my communications? [51]

Troubleshooting

- How do I add a photo to my Salesforce profile? [52]
- Why did a specific person not receive my email? [53]
- Why can’t I see a specific campaign, report, or dashboard? [14]
- I think I found a bug in Salesforce. What should I do? [54]
- I requested a change to a contact’s email address and was told the change was complete, but the old value is still showing. What should I do? [18]
- Why is a particular contact missing from my audience report? [55]
- Why can't I send a Marketing Cloud message? [56]

Unsubscribe

- How do unsubscribes work? [57]
- How can a constituent unsubscribe or subscribe to communications? [57]
- How can a user view a constituents' email preferences? [57]
- How can users avoid violating CAN-SPAM? [35]
- How do eComm specialists avoid violating CAN-SPAM? [36]*

Users

- How do I request to become an eComm user? [58]

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [59] so we can assist you.

Now, click the + symbol next to the category that best describes your question to view available resources.

Note that items followed by a * can only be completed with the help of your eComm Specialist [3].

Training

- What is Marketing Cloud? Where can I get an overview? [4]
- What Marketing Cloud new user training is offered? [60]
- Are there additional training opportunities for more advanced Marketing Cloud users? [61]
- What is CAN-SPAM and how does it pertain to me? [62]
- How can users avoid violating CAN-SPAM? [35]
- **2023 Preference and Business Unit Optimization [7]**

Accessibility

- What should I think about in terms of accessibility? [63]
- How can I ensure my email is accessible? [64]

Audience

- How can I email donors? [65]
- How do I select my audience? [66]
- How can I email my audience using their campus email addresses? [67]
- Why are my audience report names so complicated? [10]
- Can I use preferred name when communicating with my audience? [28]

- How do I add a new audience for my communications? [47]*

Automation

- How can I organize my work between Email Studio and Automation Studio? [68]
- How do I schedule a Salesforce Send Email in Automation Studio? [69]
- How do I schedule Data Extension imports in Automation Studio? [70]

Canceling an Email

- How do I cancel a scheduled send? [71]

CAN-SPAM

- What is CAN-SPAM? [72]
- What is the difference between a commercial and transactional email? [73]
- What are easy ways for users to avoid violating CAN-SPAM? [35]

Checklists & Quick Guides

All checklists & quick guides [74].

- Plan
  - Marketing Cloud Email Checklist [75]
- Test
  - Email Checklist (download) [76]
  - Email Checklist (electronic) [77]
- Audience & Sending
  - Update Audience Quick Tutorial (re-start Data Extension) [78]
  - Send Emails [79]
    - Salesforce Send Email Quick Tutorial [80]
    - Guided Send Quick Tutorial [81]
- For eComm Specialists
  - Creating Data Extensions [82]*

Data Extensions

- What is a data extension? [67]
- What is the relationship between data extensions, reports, and campaigns? [9]
- How do I build a data extension? [67]
- How do I import/refresh a data extension? [67]
- Can I import CSV data into a data extension? [83]*
- How do I delete a data extension? [84]
- Can preferred name be included in a Data Extension for personalization?* [50]

Dynamic Content

- Can Marketing Cloud emails have dynamic content to be custom to recipients based on pre-determined attributes? [85]
- Can I avoid sending multiple versions of a similar emails by using Dynamic Content? [85]

Einstein

- What is Einstein in Marketing Cloud? [86]
- Is artifical intelligence (AI) available to increase engagement with my emails? [86]
  - As of Oct. 2022, eComm users can request Einstein to be enabled. Provide the name of the Business Unit(s) you wish to have Einstein into the spreadsheet [87] (along with some other details) and it will be enabled by the following Monday.

Email Content

- How can I create an “add to calendar” link in an email? [88]
- Where can I access CU branded templates? [89]
- How do I save an email as a template? [90]
- How do I share an email? [91]*
- How do I create compelling content? [92]
- How do I use templates I've created to build an email? [93]

Email From Information

- What are send classifications, sender profiles, and delivery profiles? [94]
- How do I change my email from name? [47]*
- How do I change my email from address? [47]*
- What is the CU Footer for All emails? [32]

Folders

- How can I stay organized in Marketing Cloud? [95]
- How can I organize Salesforce Send Emails? [95]
- How can I organize Data Extensions? [95]
- How can I organize Tracking? [95]

Images

- How should I size my images? [96]
- Where can I locate great CU photography? [97]

Journey Builder

- Can I pre-set a series of emails to deliver to an audience to be more efficient? [98]

- Can I create s pre-set series of emails to deliver to an audience, where the next email is based on how the recipient engaged with the previous email? [98]

Login and Password Help

- How do I change my password? [44]
- What is my user name? [99]

Mobile

- How do I design for mobile? [100]
- How do I correct my top image display in mobile? [101]

Personalization

- How can I add personalization (from Salesforce) to my Marketing Cloud email? [28]
- How can I test or preview personalization in my email to ensure I did it correctly? [102]
- How can I add other personalized information (from outside of Salesforce) to my Marketing Cloud email? [103]*
- Preferred Name Rollout for eComm Specialists. [50]*

Reporting

- How do I use Discover Reports in Marketing Cloud? [104]
- How do I use the Audience Engagement Over Time report? [105]
- How do I use the Best Performing Send Day report? [106]
- How do I use the Deliverability - Complaint Rate report? [107]
- How do I use the Device Performance by Email Sends and Email Performance by Device reports? [108]
- How do I use the Recent Email Send Summary report? [109]
- How do I use the Time Between Send and Engagement report? [110]
- How do I Report on preferred name? [50]

Send/Schedule an Email

- How do I send an email? [79] (Guided Send or Salesforce Send Email options)
- Where can I view/cancel my scheduled email? [111]
- What is the relationship between campaigns, reports, and data extensions? [9]
- Why do I need an email footer and what should be in it? [112]
- What is throttling and how do I do it? [113]
- What should I consider when scheduling an email? [114]

Subject Lines and Preheaders

- How do I choose a subject line? [115]
- What is a preheader? [116]

- Can I add personalized data to the subject line and preheader? [117]
- How do I add an emoji to my subject line or preheader? [118]

Subscriptions

- Is there a way for me to grow my audience? [51]
- Can folks subscribe to receive my communications? [51]

Subscribers in Marketing Cloud

- What is a subscriber? [22]
- How can I view a subscriber? [119]
- How can I view subscriber status and what do the statuses mean? [119]
- How do I reactivate a subscriber? [119]*
- How do I convert a subscriber key to a contact ID? [120]

Testing

- How do I send a test email? [121]
- What should I look for in a successful test? [122]
- What is an A/B test and how do I perform one? [123]
- How can I test personalization? [102]
- Does the data appear in Salesforce? [124]

Templates

- Can I view CU and UCCS branded templates? [125]
- How can I access CU and UCCS branded templates? [126]
- How do I save an email as a template? [127]
- How do I use templates I've created to build an email? [93]

Tracking and Reporting

- Why is tracking important? [128]
- Where can I view tracking information for my email? [129]
- How can I export tracking information for my email? [130]*
- How can I compare the data of different email sends? [130]
- What is Datorama? [131]
- What is Einstein? [86]

Troubleshooting

- My message ended up in a spam folder. How can I prevent this? [132]
- How do I fix a broken link in an email I already sent? [133]
- Are there checklists that can help me do my job better? [134]
- With what browsers is Marketing Cloud compatible? [135]

- Why didn’t a contact receive my email? [53]
- Why can't I send emails from Marketing Cloud? [56]
- I can’t see the audience list I’m sending to. What should I do? [14]

Unsubscribe

- How do unsubscribes work? [57]
- How can a constituent unsubscribe or subscribe to communications? [57]
- How can a user view a constituents' email preferences? [57]

Users

- How do I add a new user or update a license? [136]*

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [59] so we can assist you.

Now, click the + symbol next to the category that best describes your question to view available resources.

Note that items followed by a * can only be completed with the help of your eComm Specialist [3]. Additionally, some of the links below require that you are logged into Cvent to access their help and resources.

Training

- What is Cvent? Where can I get an overview? [4]
- What Cvent training is available? [137]
  - Cvent Academy (including certifications) [138]
- How can I contact Cvent Help & Support? [139]
- Does Cvent offer training and support resources? [139]
- Quarterly Cvent Release Notes [140]

Abstract Management

- What is Abstract Management? [141]
- How do I get Abstract Management and other Cvent add-ons? [142]

Accessibility

- How can I plan an accessible event? [143]

Add-Ons (Abstract Mgmt., Attendee Hub, etc)

- What additional Cvent products are available for purchase? [142]

App

- Does Cvent have an app for event attendees? [144]
  - What is CrowdCompass? [144]
  - How far ahead should I plan if I'm going to use CrowdCompass? [144]
  - How much does CrowdCompass cost? [145]
  - Is there a way I can offset CrowdCompass costs? [145]
- Does Cvent have an app for event planners to check attendees in? [42]
  - What is OnArrival? [42]

Approval and Launch

- How do I submit my event for approval? [146]
- Why do I have to submit my event for approval? [146]
- How do I launch my event? [146]

Attendee Hub

- Does Cvent have a product to help support virtual or hybrid events? [147]
- What is Virtual Attendee Hub? [147]
- How do I get Attendee Hub and other Cvent add-ons? [142]

Capacity

- How do I give my event or agenda items a capacity? [148]

Checklists & Quick Guides

All checklists & quick guides. [74]

- Plan
  - Cvent Build Checklist [149]
  - Event Strategy Checklist [150]
- Test
  - Event Checklist (download) [151]
  - Event Checklist (electronic) [152]
- Event Approval & Launch
  - How-To Request Approval & Launch Event [153]
  - Event Approval Checklist (used by event approvers) [154]

- What to check before opening registration (from Cvent) [155]
- Fundraising Events
  - Create a fundraising event [156]

Classic Sunset

- When is Cvent Classic sunsetting? [157]
- Are there live, virtual trainings to help me transition away from Classic? [158]
- Are there trainings available on-demand to help transition away from Classic? [159]

Contacts

- How do I add a new contact type for my event? [47]*

CrowdCompass

- What is CrowdCompass? [144]
- Does Cvent have a mobile app to support events? [144]
- How do I get CrowdCompass and other Cvent add-ons? [142]

Email

Email Communication

- How can I communicate with past attendees? [160]
- How do I send event and session emails? [161]
- How can I ensure an email was sent and delivered? [162]
- If I’m sending an event reminder in Marketing Cloud, how do I exclude people who have already registered? [163]

Email Policies

- How do I send an event invitation through Cvent? [164]
- What event emails are sent through Cvent? [164]
- What is the difference between a commercial and transactional communication? [165]
- Does my Cvent email need to have an unsubscribe option? [165]
- Do my Cvent emails need to contain the Cvent footer and privacy policy? [166]

Email Setup

- How do I add a new event planner email address? [167]*
- What should my Cvent emails include? [166]
- Does my Cvent email need to have an unsubscribe option? [165]
- Do my Cvent emails need to contain the Cvent footer and privacy policy? [166]

Event Participants

Event Preparation

Financial Information

Fundraising

Guests

Images

Integrations

- How does the Cvent-Salesforce integration work? [40]
- How can I find my Cvent event in Salesforce? [40]
- How can I get event guests added to Salesforce? [41]
- How can I track event attendees to get the most out of the Cvent-Salesforce integration? [42]
- Can I integrate Cvent with other platforms not supported by eComm? [185]

Invitation Forwarding

- How do I use invitation forwarding? [186]

Logging in and Password Help

- What is our Cvent account name? [99]
- What is my user name? [99]
- How do I reset my password? [99]

On-Site Tools and Support

- How can I run check-in at my event? [42]
- What is OnArrival? [42]
- Can I collect credit card payments on-site? [178]
- What devices support OnArrival? [42]
- Does OnArrival offer session check-in? [187]
- How can I get OnArrival Premium? [42]
- What is Event in a Box, and how much does it cost? [188]

Paid Event

- What account code should I use? [176]
- What speedtype should I use? [176]
- What designation code should I use? [156]
- How do I get an account code, speedtype, or designation code added to Cvent? [47]*
- How do I issue a refund? [177]
- What is PCI compliance? [178]
- How can I accept credit card information outside Cvent? [178]
- What are Cvent’s credit card fees? [176]
- How do I create a fundraising event? [156]
- What test credit card numbers can I use? [180]

Portal (for Reports)

- How can I give someone else at CU access to event Reports (for free)? [189]
- How are Reports managed in the Portal?* [190]

Promote Event

- How do I promote my event? [191]

Questions

- Adding Event Questions [192]

Registration Types

- Adding Registration Types [193]

Reporting

- How do I run Reports for my event? [194]
- What is the portal and how do I get Reports published to it? [189]*
- How can a stakeholder get access to view Cvent reports in real time? [189]*
- How do I create a report of events created by one user? [195]*

Sharing

- How do I share my event with another user? [196]

Support

- What kinds of support and resources can I get through Cvent? [139]

Survey

- Configure Event or Session Survey [197]
- How do I send a survey to my event participants? [197]

Templates

- Where can I view CU-branded event templates? [198]
- How do I access CU-branded event templates? [199]
- Where can I learn more about CU branding? [184]

Testing

- How should I test my event? [200]
- Is there a testing checklist that can help me be successful? [134]
- What test credit card numbers can I use? [180]

Troubleshooting

- What are Cvent’s recommended browsers? [201]
- Special Characters in Cvent Event Titles & Payment Processing Issues [202]

Use

- Should I be a Cvent user? I host one event a year. [203]

Waitlists

- How do I set up event waitlists? [204]

Website

- Where do I find my event weblink? [191]
- How do I create a custom URL? [205]
- How do I hide my event from search engines? [206]

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [59] so we can assist you.

Now, click the + symbol next to the category that best describes your question to view available resources.

Apsona

- How do I add contacts using Apsona? [13]
- How do I match against existing contacts using Apsona? [13]
- How do I add campaign members in bulk using Apsona? [13]

Business Units and Marketing Cloud Permissions

- How do I grant access to a business unit or unit? [207]
- How do I view a user’s permissions? [207]
- How do I change a user's permissions? [207]
- What roles and permissions should a user have? [208]
- What roles and permissions should an eComm Specialist have? [208]
- How do I integrate a user with Salesforce? [209]
- How do I request a new business unit? [210]

Campaigns

- How do I add contacts to a Salesforce campaign in bulk? [13]
- How do I share a campaign with another user? [14]
- How do I share a campaign with a public group? [14]
- Why do campaigns have such complicated names? [10]
- How do I add contacts to a Salesforce campaign in bulk? [13]

Chatter

- How do I post in Chatter? [15]
- How do I set my Chatter notifications? [15]
- Why am I not seeing all of my Chatter posts? [15]

Checklists & Quick Guides

All checklists & quick guides [74].

- Creating Data Extensions [82]
- Event Approval Checklist (used by eComm specialists) [154]

Cvent

- How do I approve an event? [211]
- Is there a checklist I should use when approving an event? [134]
- How do I add a new contact type? [47]
- How do I add a new event planner email address? [167]
- How do I get an account code, speedtype, or designation code added to Cvent? [167]
- How do I reset a user's password? [212]
- What is the Cvent Portal for Reports? [189]
- How do I manage Reports in the Cvent Portal? [190]
- How do I create a test user? [47]
- Can Cvent be integrated with other platforms not supported by eComm? [185]

Dashboards

- How do I create a dashboard? [31]

Data Extensions

- How do I build a data extension? [67]
- Can I import CSV data into a data extension? [83]

Duplicates

- Why are there duplicate contact records? [19]

- How to I merge two or more contacts? [19]

Email Preferences

- How do I modify a contacts email preferences? [33]
- How do I change the name of an existing email preference? [213]
- How do I create a new email preference? [213]

Onboarding

- What steps are involved in the onboarding process? [214]
- How do I know if a user is a good candidate for an eComm license? [215]
- How do I know what requests are in the queue to be addressed next month? [216]
- How can I check who passed the required post-training quiz? [216]
- What tasks need to be complete if a new user is joining an existing group? [217]

Password Resets & Permissions

- Marketing Cloud
  - What access should a Marketing Cloud User have? [208]
  - How do I reset a user's password or help them with multi-factor authentication (MFA)? [207]
  - How do I grant access to a business unit or unit? [207]
  - How do I view a user’s permissions? [207]
  - How do I change a user's permissions? [207]
  - How do I integrate a user with Salesforce? [209]
- Cvent
  - What access should a Cvent user have? [218]
- General
  - What tasks must a user request from an eComm specialist? [47]
  - Is there a detailed breakdown of roles and responsibilities? [219]
  - What roles and permissions should a user have? [208]
  - What roles and permissions should an eComm Specialist have? [208]

Personalization

- How can I add personalized information (that is in Salesforce) to my Marketing Cloud email? [28]
- How can I add personalized information (that is not in Salesforce) to my Marketing Cloud email? [103]
- How do you preview/test personalization? [102]

Public Groups

- What is a public group? [220]
- How do I add users to an existing public group? [220]

- How do I create a new public group? [220]

Release Notes

- Quarterly Release Notes [140]

Reports

- How do I build Salesforce reports? [46]
- Check Report Unique Count [221]

Sender Profiles, Delivery Profiles, and Send Classifications

- How do I create a send classification? [222]
- How do I create a delivery profile? [223]
- What are send classifications, sender profiles, and delivery profiles? [94]
- How do I create a sender profile? [224]
- How do I verify a sender profile? [225]

Sharing

- How do I share an email? [91]
- How do I share in Salesforce (Campaigns, Reports and Dashboards)? [14]
- How do I share a Cvent event with another user? [196]

Subscribers

- What is a subscriber? [22]
- How can I view a subscriber? [119]
- How can I view subscriber status and what do the statuses mean? [119]
- How do I reactivate a subscriber? [119]
- How do I convert a subscriber key to a contact ID? [120]

Training

- What new user training is offered? [226]
- How are new users notified of training? [216]
- What tasks are users responsible for vs. an eComm specialist? (access levels and how-tos) [219]
- CAN-SPAM Quiz | Easy ways to avoid violating CAN-SPAM [36]

Users

- All Users
    - Where can I view all of the license holders on my campus? [227]

- New Users
  - How are do new users get access? [216]
  - What are my roles and responsibilities when onboarding a new eComm user? [228]
- Marketing Cloud
  - How do I reset a Marketing Cloud password? [207]
  - How do I unlock a user in Marketing Cloud [207]?
  - How do I change a user's password in Marketing Cloud? [207]
  - How do I integrate a Marketing Cloud user with Salesforce? [209]
  - Why can't my user send an email in Marketing Cloud? [229]
- Cvent
  - How do I reset a Cvent password? [230]
- Salesforce
  - How do I reset a Salesforce password? [44]

Display Title:
Need eComm Help? Start Here.
Send email when Published:
Yes

Source URL:https://www.cu.edu/blog/ecomm-wiki/need-help-start-here

Links
[1] https://www.cu.edu/blog/ecomm-wiki/need-help-start-here [2] https://www.cu.edu/blog/ecomm-wiki/author/13789 [3] https://www.cu.edu/ecomm/strategy/leadership [4] https://www.cu.edu/blog/ecomm-wiki/tool-overview [5] https://www.cu.edu/blog/ecomm-wiki/new-user-training-salesforce
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