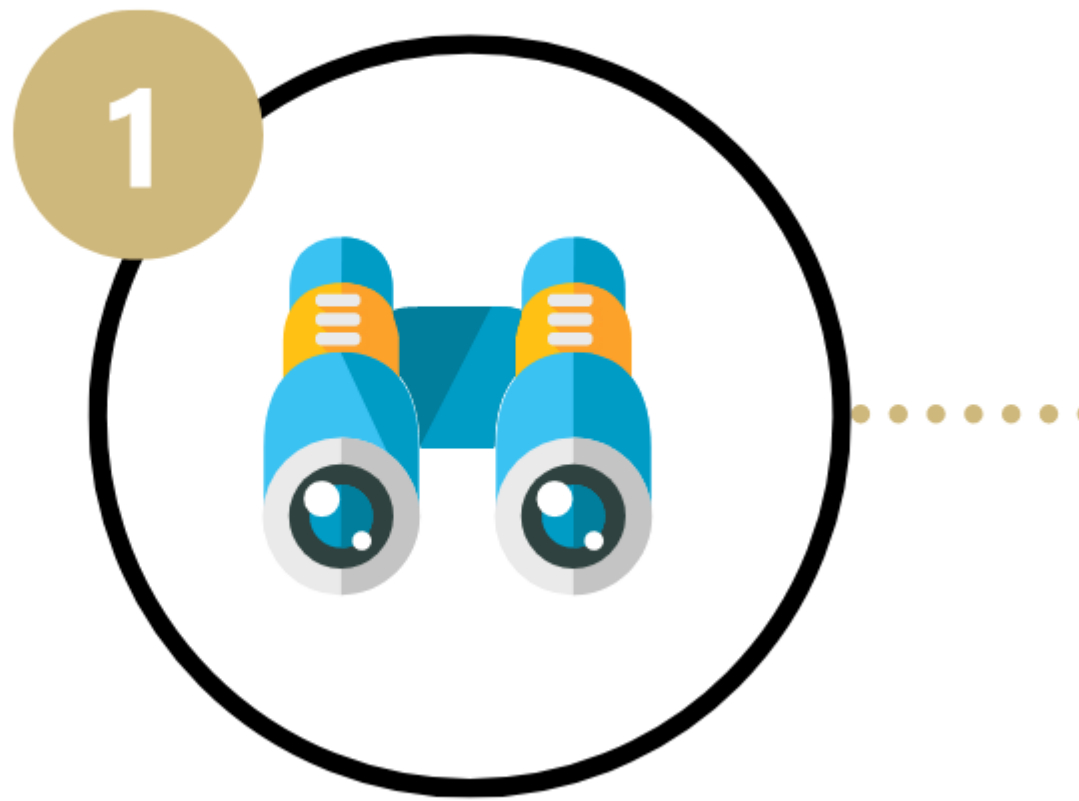


## **New User Onboarding Journey** <sup>[1]</sup>

January 31, 2022 by [Melanie Jones](#) <sup>[2]</sup>

This resource is designed for eComm specialists who help onboard new users for their campus. [Once you know the overall process for requesting new licenses and important deadlines](#) <sup>[3]</sup>, get a peek into all the customized emails new users will receive during their first 7 months in the applications. [From the new user perspective](#) <sup>[4]</sup>, this wiki walks through step 3 (Login, Training & Quiz) and part of step 4 (Continued Education) for successful onboarding.



## Discovery

Meet with an eComm specialist to review communication and/or event goals to confirm eComm is the right fit.

- The **eComm specialist(s) listed at the bottom of each email** are based on the eComm specialist field on the License record in Salesforce.
- The email examples below are for new users in all the eComm applications (Marketing Cloud/Salesforce and Cvent). **Emails are customized with relevant content** when a new user gets access to only some applications (that is, Marketing Cloud/Salesforce only or Cvent only). In these cases, the new user onboarding journey is shortened to five resource emails (rather than seven).

## Credentials, Training & Quiz

**CC-d:**

eComm specialists**Delivery:**

Around 5th of each month (assuming provisioning request submitted with pre-a

**Important:**

Users must complete the quiz with the email address indicated.

New users will receive two variations of the first email based on the next steps they need to take. While most new users are presented with credentials, training resources, and a quiz, sometimes training and the quiz are already complete. If so, they are presented with additional resources (rather than training and the quiz) and will already have access to send emails.

***Your eComm license is now active. | Credentials, training & a short quiz to complete by the end of the month.***

**Your eComm license is now active.**

## **LOGIN DETAILS**

[full instructions](#) | [login page](#)

### **Marketing Cloud**

- Username:
- Temporary Password: **Welcome@1**

### **Cvent**

- Account Name: **UCCO003**
- Username:

Select '*Forgot your login information?*' under the green login button to set your password and log in for the first time.

### **Salesforce**

Choose your campus and log in using your campus credentials (the same you use to log into your account on the employee portal)

## **TRAINING & QUIZ**

### **Required**

- [Understanding CAN-SPAM \(8 minutes\)](#)
- [Marketing Cloud New User Training \(45 minutes\)](#)
- [Cvent New User User Training \(45 minutes\)](#)
- [Knowledge Verification Quiz](#)
  - *Use your official university email:*

### **Optional**

- [Salesforce New User Training \(15 minutes\)](#)

**Complete Quiz**

***Your eComm license is now active. | Find your credentials below and log in for the first time.***

**Your eComm license is now active.**

## LOGIN DETAILS

[full instructions](#) | [login page](#)

### Marketing Cloud

- Username:
- Temporary Password: **Welcome@1**

### Cvent

- Account Name: **UCCO003**
- Username:

Select '*Forgot your login information?*' under the green login button to set your password and log in for the first time.

### Salesforce

Choose your campus and log in using your campus credentials (the same you use to log into your account on the employee portal)

## CONTINUED RESOURCES

Remember to send requests to your eComm specialist (below & cc'd) to have items [added to your account](#). Please keep their turnaround times in mind when submitting your request.

### RESOURCES

[Ask for Help](#) | Submit a ticket and it will get to the right people.

[Wiki Library](#) | Access articles and tutorials devoted to specific topics, broken down by application.

### [Marketing Cloud Intermediate Training](#)

- [Image Best Practices](#)
- [Data Extensions](#)

## Quiz Reminders (if needed)

**CC-d:**

eComm specialists**Delivery:**

Weekly as needed (up to 4 times)**Important:**

Users must complete the quiz with the email address indicated.

**Complete training and the eComm quiz soon. | *Let us know if you need any help getting started.***

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## REMINDER

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Complete training and the eComm quiz as soon as you can. Doing so will grant your access to send Marketing Cloud emails and have your Cvent events approved.

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## TRAINING & QUIZ

### Required

- [Data & Tool Model \(5 minutes\)](#)
- [Understanding CAN-SPAM \(5 minutes\)](#)
- [Marketing Cloud New User Training \(45 minutes\)](#)
- [Cvent New User User Training \(45 minutes\)](#)
- [Knowledge Verification Quiz](#)
  - *Use your official university email.*

### Optional

- [Salesforce New User Training \(15 minutes\)](#)

Complete Quiz

---

## FIRST TIME LOGIN DETAILS

[full instructions](#) | [login page](#)

### Marketing Cloud

- Username:
- Temporary Password: **Welcome@1**

### Cvent

- Account Name: **UCCO003**
- Username:

Select '*Forgot your login information?*' under the green login button to set your password and log in for the first time.



**You passed the quiz!**

**CC-d:**

eComm specialists**Delivery:** 9 AM the day following completing the quiz

***You passed eComm's short verification quiz. | Send emails through Marketing Cloud and get your Cvent event approved by your eComm specialist.***

## You passed the eComm quiz.

You passed eComm's short verification quiz and can now send emails through Marketing Cloud and get your Cvent event approved by your eComm specialist (below and cc-d).

### Add to Account

eComm users have a limited level of access and must request certain items to be added to their account by an eComm specialist before using them. For example:



#### Salesforce & Marketing Cloud

- Audience Creation
- From Information
- Update Data



#### Cvent

- Event Approval
- Event Planner Email Address
- Finance Information
- Publish Reports to Portal

Items to Request

### Resources to Remember



#### eComm Wiki Index

Click on the name of the tab that matches the eComm application with which you require assistance.

#### Indexed Resources

#### Cvent Help & Support

Search existing tutorials or contact support by:



## Resource 1

**Delivery:** 14 days after previous email

***Resources for New Users*** | eComm provides numerous resources to ensure success when sending emails or launching events.

## Resources for New Users

eComm provides numerous resources to ensure success when sending emails or launching events - whether it's your first or fifth time this week.

## Checklists & Quick Guides

Checklists and simple how-tos are easy and effective methods to ensure a quality product goes out the door every time. eComm's most successful users embrace checklists regardless of how many successful emails they have already sent.



### Salesforce & Marketing Cloud

#### Plan

- [Email Checklist](#)

#### Test

- [Printable](#) or [Electronic](#) checklist

#### Send

- [Update Data Extensions](#)
- [Two Methods to Send Emails](#)  
(with videos)
  - [Guided Send](#) (2-pager)
  - [Salesforce Send Emails](#)  
(3-pager)



### Cvent

#### Plan

- [Cvent Build Checklist](#)
- [Event Strategy Checklist](#)

#### Test

- [Event Approval Checklist](#)

#### Event Approval & Launch

- [Request Approval & Launch](#)

Checklists & Quick Guides

## Marketing Cloud Resources



### Test Emails

Users can [send a test email to five email addresses within the Preview and Test](#) step of Marketing Cloud's email editor. Alternatively, many test by

## Resource 2

**Delivery:** 30 days after previous email

***Easy ways to avoid violating CAN-SPAM / Innocent mistakes can occur that lead to a CAN-SPAM violation.***

## Easy Ways to Avoid Violating CAN-SPAM

We know eComm users intend to follow the federal CAN-SPAM Act, but sometimes, innocent mistakes can occur that lead to a violation. Learn about [common ways to violate CAN-SPAM](#) so you can avoid them.



### Audiences

- Understand Commercial vs. Transactional Naming Conventions
- Re-Start Data Extensions Before Each Send (below)
- Never Send to Campaigns



### Email Requirements

- A footer with the sender's physical address, mailing address and website.
- A second footer allowing recipients to opt-out added by selecting the CU FOOTER FOR ALL EMAILS Delivery Profile when sending.

Avoid Violating CAN-SPAM

## Marketing Cloud Data Extensions

If you need to send communications to internal audiences (faculty/staff or students) you'll want it delivered to their campus email addresses (eg; @colorado.edu, @ucdenver.edu, @cu.edu or @uccs.edu). To do so, you'll need to send to a Data Extension.

Your eComm specialist will create the Data Extension, but **it's the sender's responsibility to re'Start' it before each send**. Those using Data Extensions need to be familiar with:

- Re-starting Data Extensions
- Receiving notifications
- Checking the status and history

Data Extensions Details

## Resource 3

**Delivery:** 30 days after previous email

***Make your digital communications and events accessible to all | Approach emails and events with universal design and accessibility in mind.***



## Are you doing everything you can to make your digital communications and events accessible to all?

Accessibility means a person with a disability is afforded the opportunity to acquire the same information, engage in the same interactions, and enjoy the same services as a person without a disability in an equally effective and equally inclusive manner, with substantially equivalent ease of use.



### Alternative Text

- Provide alternative (ALT) text for email images that conveys a concise description relevant to the email message.



### Contrast & Color

- Provide sufficient contrast between the text and background.



### Fonts

- Sans serif fonts (Arial) are considered to be the most readable on screen.
- Larger font sizes are easier to read (at least 14 points).



### Hyperlinks

- Links must reflect the context of the communication (avoid 'click here')
- Embed the link within text that describes where the link leads (don't embed a full hyperlink)
- Type out full email address and link (rather than 'email us')

Consider Accessibility for Communications

## Events



## Resource 4

**Delivery:** 30 days after previous email

***Good design can increase email and event engagement / Set yourself up for success by leveraging templates and following best practices.***

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## Design

Creating a good-looking email in Marketing Cloud is one thing, but ensuring it displays well across inboxes is a greater challenge. Set yourself up for success by leveraging templates and following best practices for desktop and mobile design, image sizing, known Marketing Cloud oddities, and more.

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## Templates & Images

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### Marketing Cloud

- [Email Templates](#)
- [Image Sizes & Best Practices](#)



### Cvent

- [Event Templates](#)
- [Image Sizes](#)

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## Marketing Cloud Resources

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### Email Design Best Practices

CU Anschutz hosted a Lunch and Learn session to provide Marketing Cloud email design tips and tricks, including:

- Benefits of a well-designed email
- Things to consider before you start
- How to structure a marketing email
- What to look for in email tests
- Common formatting issues with Marketing Cloud

### Email Design Best Practices

### Three Text Block Tips

Learn to apply three best practices when using text blocks to have confidence in how your emails display for recipients.

### Three Text Block Tips



## Resource 5

**Delivery:** 30 days after previous email

***Everything to know about Cvent events collecting money / Fix broken links and personalize emails with Marketing Cloud.***

## Events Collecting Money

While Cvent will support events that collect money, it's crucial they are configured correctly. You're eComm Specialist will help ensure everything is correct while approving your event. Still, it is important that the event planner is familiar with these nuances - from configuring the event to getting money back to your department (or the right fund if a fundraising event).



### Paid Events

Managing monies for events can get complex, although we intend to shield event planners from the madness. By centralizing finances, we can bring efficiency to CU while maintaining our registrants' security.

With eComm, a Cvent event can be configured to collect money for an event that will later be deposited to your speed type.

[Paid Event Details](#)



### Fundraising Events

Fundraising events in Cvent must follow specific requirements when being created to be launched successfully. You'll work with representatives from other teams (like System Advancement, the CU Foundation, and the Office of the University Controller) to ensure that you meet tax deductibility, fair market value, and gift reporting requirements.

[Fundraising Event Details](#)

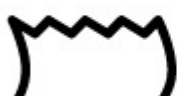


### [Test Credit Card Numbers](#)

Complete tests for your paid event while the event is in pending status with any of the following numbers:

- Discover - 601111111111117
- Mastercard - 555555555554444
- Visa - 411111111111111

The Card Security Code (CSV) can be any 3-digit number and the Expiration Date can be any date in the future.



### [Data-Tags for Receipting](#)

Data tags are placeholders for information stored within Cvent

## Resource 6

**Delivery:** 30 days after previous email

***Use data to better connect with your constituents / Check out where you've been to help drive where you go.***

## Analytics & Tracking

There are a few different ways to get tracking and analytics for your precious sent communications, all which can be leveraged into engaging your audience better in the future.



### [Salesforce Dashboards](#)

Dashboards are available on the Salesforce homepage to provide a perspective on email sends from a Campus or Business Unit. The data they present can help address questions like:

- How are my Business Unit's emails performing?
- When are my Business Unit's emails performing?



### [Marketing Cloud Einstein](#)

Einstein for Marketing Cloud uses artificial intelligence (AI) to help you analyze, automate, and optimize your marketing activities and content. With Einstein, you can improve your marketing communication efforts with valuable insights and data on:

- Audiences
- Send time
- Engagement
- Copy/content

## Cvent Resources

### Reports

[Cvent Reports](#) provides insights for your event, such as:

- Who registered
- How much money was collected
- How post-registration emails were received, and much more.

After identifying what information you wish to report on, run a template then customize it for your needs and save it for easy access in the future.



## Resource 7

**Delivery:** 30 days after previous email

***Efficiency & Organization in Marketing Cloud / Cvent: Track attendee participation & share events with other users to collaborate.***



## Cvent Resources



### Track Participation

Track attendance for your event or sessions by marking who showed up. With Cvent, you can mark them one at a time, import a list of participants all at once, or use OnArrival to mark participants onsite.

Track Participation



### Share Events

Collaborating with someone else at CU on your events? Give other Cvent Users visibility to your event so they can modify your registration, access reports, help manage invitees, clone it for a future event, and more.

Share Events

## Marketing Cloud Resources



### Set Default Login Preference

Do you find yourself taking two clicks every time you login to Marketing Cloud to navigate to Email Studio? Set your Default Login Preference to Email to avoid that step when logging in.

Default Login Page

### Folders in Marketing Cloud

We know how cluttered your Marketing Cloud account can get if you are a frequent sender. Use these different types of folders (and other tips) to stay organized.

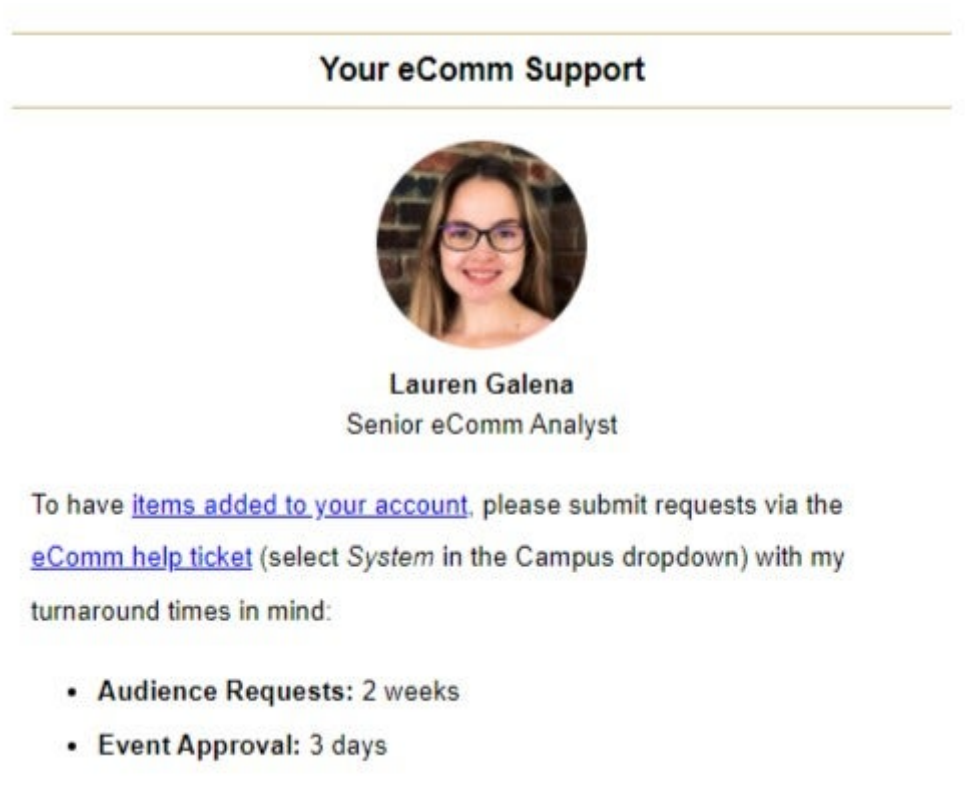
Stay Organized with Folders





## 'eComm Support' Footer Customization

As mentioned in the video above (20:22), eComm specialists have the opportunity to further customize their footers twice a year\*. See below for an example of the default footer (with a headshot of each eComm specialist with their name and title) taken to the next level with custom resources for System users.

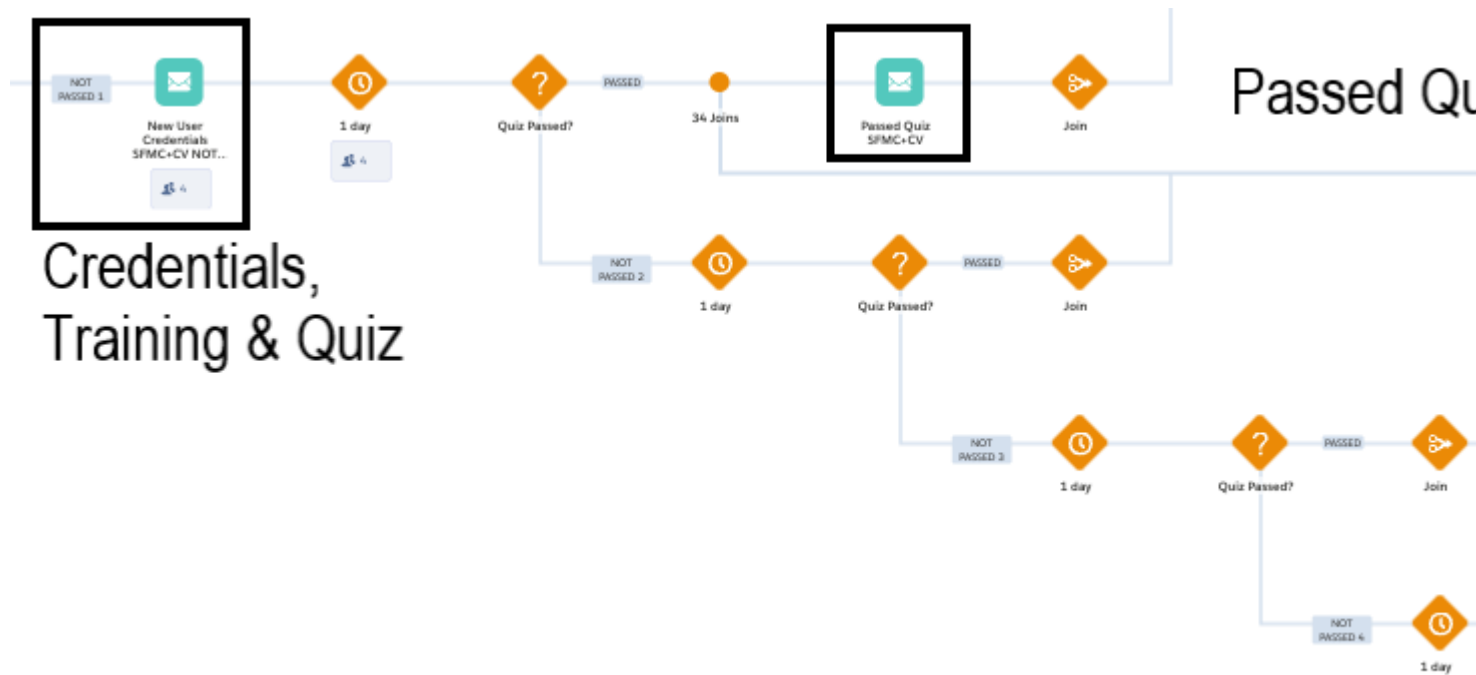


- **March 10 | eComm specialists**
  - Provide edits to the default footer (headshot images, names, and titles)
  - Provide additional language and links exactly as desired.
- **March 15 | Mel**
  - Send Test for Review
- **March 20 | eComm specialist**
  - Approve or Provide Edits

*\*The 'eComm Support' footers can be updated twice a year (pending new development, every other month). We will reach out again during our next opportunity to customize the footers (Spring/Fall).*

Check out how these emails are configured in Marketing Cloud with Journey Builder. Due to the length and complexities, images of the entire Journey are provided along with a zoomed-in version of the two main pathways.

- **Overview** <sup>[5]</sup>
  - **Longest Path:** 1) Credentials, Training & Quiz | 2) Quiz Reminders | 3) Passed Quiz <sup>[6]</sup> (below)
  - **Shortest Path:** 1) Credentials (already passed quiz) | 2) Resources <sup>[7]</sup>



## Related Content

- [How do I view a contact?](#) <sup>[8]</sup>
- [What is the difference between a Standard Contact and an Individual Contact?](#) <sup>[9]</sup>
- [How do I modify information on a contact \(such as the email address\)?](#) <sup>[10]</sup>
- [How do I add a contact to a Salesforce campaign?](#) <sup>[11]</sup>
- [What are individual email results \(IERs\), and how can I use them?](#) <sup>[12]</sup>
- [How do I add contacts to Salesforce?](#) <sup>[13]</sup>
- [How can I match new contacts against existing contacts to avoid creating duplicates?](#) <sup>[14]</sup>
- [How will I know if a contact received my email?](#) <sup>[12]</sup>
- [How does a Salesforce contact relate to a Marketing Cloud Subscriber?](#) <sup>[15]</sup>

- Is Salesforce GDPR compliant? <sup>[16]</sup>

**Display Title:**

New User Onboarding Journey

**Send email when Published:**

No

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**Source URL:** <https://www.cu.edu/blog/ecommerce/wiki/new-user-onboarding-journey>

**Links**

[1] <https://www.cu.edu/blog/ecommerce/wiki/new-user-onboarding-journey> [2] <https://www.cu.edu/blog/ecommerce/wiki/author/39> [3] <https://www.cu.edu/blog/ecommerce/wiki/monthly-license-change-requests>  
[4] <https://www.cu.edu/ecommerce/training>  
[5] [https://www.cu.edu/sites/default/files/New%20User\\_full%20screen.png](https://www.cu.edu/sites/default/files/New%20User_full%20screen.png)  
[6] [https://www.cu.edu/sites/default/files/New%20User\\_Quiz%20Reminder.png](https://www.cu.edu/sites/default/files/New%20User_Quiz%20Reminder.png)  
[7] [https://www.cu.edu/sites/default/files/New%20User\\_Resources.png](https://www.cu.edu/sites/default/files/New%20User_Resources.png)  
[8] [https://www.youtube.com/watch?v=06N1nEM\\_KOk&feature=youtu.be](https://www.youtube.com/watch?v=06N1nEM_KOk&feature=youtu.be)  
[9] <https://www.cu.edu/blog/ecommerce/wiki/standard-contacts-vs-individual-contacts>  
[10] <https://www.cu.edu/blog/ecommerce/wiki/updating-contact-information-salesforce>  
[11] <https://www.cu.edu/blog/ecommerce/wiki/create-salesforce-campaign-and-add-campaign-members>  
[12] <https://www.cu.edu/blog/ecommerce/wiki/salesforce-individual-email-results-iers>  
[13] <https://www.cu.edu/blog/ecommerce/wiki/adding-and-matching-contacts-apsona>  
[14] <https://www.cu.edu/blog/ecommerce/wiki/using-salesforce-apsona> [15] <https://www.cu.edu/blog/ecommerce/wiki/salesforce-contacts-marketing-cloud-subscribers> [16] <https://www.cu.edu/blog/ecommerce/wiki/understanding-gdpr>