

## **Subscriptions** <sup>[1]</sup>

March 18, 2024 by [Melanie Jones](#) <sup>[2]</sup>

Want to continually grow an audience you can email via Marketing Cloud? eComm can provide a simple subscription form with a tool called FormAssembly (example below) along with a Salesforce audience that will update automatically with subscribers (thanks to a behind-the-scenes integration). Users can drive subscriptions by posting the form to their website, and then send emails to that audience as desired.



University of Col  
Colorado Spring

## Subscribe | UCCS NIHR News

### Subscribe Now

Enter your information below to subscribe to UCCS NIHS News.

First Name \*

Last Name \*

Email Address \*

Subscribe

## Understand FormAssembly Subscriptions

### Examples at CU

- Simple

- [More Data](#)
- [New Contacts](#)
- [Unsubscribe](#)
- [Journey](#)

The following forms are the most common and simple examples, collecting the minimum requirements of first name, last name, and email.

- [CU Boulder: Benson Center for the Study of Western Civilization](#) <sup>[3]</sup>
- [CU Denver News](#) <sup>[4]</sup>
- [UCCS Communique Subscription Form](#) <sup>[5]</sup>
- [System: CU Connections](#) <sup>[6]</sup>

The following forms collect more information than the minimum of first name, last name, and email. This additional information collected remains in FormAssembly and is **not** sent to Salesforce. Users can request this data via a file as needed or on a regular frequency.

- [CU Boulder: Roaming Buffs Travels Program](#) <sup>[7]</sup>
- [CU Boulder: The Herd Leadership Council](#) <sup>[8]</sup>
- [CU Denver: Alumni News](#) <sup>[9]</sup>
- [CU Denver: Elevation](#) <sup>[10]</sup>
- [UCCS: Noticias sobre el programa preuniversitario](#) <sup>[11]</sup>

A FormAssembly form is used to create new Contacts within Salesforce. Users can follow these instructions to [Manage Campaign Members](#) <sup>[12]</sup> (expand *Add New Contacts* section).

- [Create New Contacts](#) <sup>[13]</sup>

CU Advancement sends numerous emails each year on Giving Day. To avoid having individuals opt out of all Giving Emails (via the Giving Opportunities preference) or all communications, recipients can opt out of the series of emails for Giving Day.

These unsubscription forms integrate with Salesforce the same as subscription forms, by populating a Campaign with Campaign Members. The difference is that the sender will use the Campaigns associated Report/Data Extension as an Exclusion (rather than an Inclusion).

- [CU Boulder: Buffs All In](#) <sup>[14]</sup>
- [CU Denver: Make it Real](#) <sup>[15]</sup>
- [UCCS takes its Alumni & Friends Association subscription](#) <sup>[16]</sup> to the next level with a Journey.

## Integration Details

- When an email address is provided, it matches against all email fields on a Contact in Salesforce (Email, UCD Email, UCB Email, UCCS Email, or SYS Email).
  1. If the email address is found in Salesforce, that Contact is added to the Campaign as a Campaign Member.
  2. If the email address is NOT found in Salesforce, a new Standard Contact is created (with First Name, Last Name, Email ) and added to the Campaign as a Campaign Member.

This FormAssembly integration mirrors how the Cvent-Salesforce integration behaves [17].

## Integration Details

Additional information provided while subscribing is NOT sent to Salesforce. This data lives in FormAssembly and can be provided on a regular cadence if desired.

## Compare FormAssembly Subscription to External Site Form

	FormAssembly / eComm Subscription	External Site Form
<b>Request Form</b>	Submit a request to be fulfilled in 3-5 days.	User may or may not be able to request a form via their unit's resources.
<b>Access to Create / Edit</b>	System Office Only	User may or may not have access to create/edit forms via their unit's resources.
<b>Display Control</b>	Promote URL  <u>Publish with an iframe</u> [18]   <u>example</u> [19]  <u>Embed form HTML</u> [20]   <u>example</u> [21]	Forms native to the site appear embedded.
<b>Data Access (if more than FN, LN, Email collected)</b>	System Office only, available on-demand or on a regular frequency.	The user or their team likely has access to data on-demand.
<b>eComm Salesforce Integration: Campaign Member</b>	Integrated to match on email provided to add Campaign Members to the Campaign.	Must be manually processed via an audience creator (likely by creating a Campaign and then using Apsona to add Campaign Members).

	FormAssembly / eComm Subscription	External Site Form
eComm Salesforce Integration: Update Email Address Provided	<p>Email provided is used to match an existing Salesforce Contact as a Campaign Member to a Campaign. An existing Contact would never have their email address updated.</p> <p>If the email provided is not in Salesforce, a Standard Contact will be created with the First Name, Last Name, and Email provided.</p> <p>If done manually, the user could send data to Ascend to process the updated email address.</p>	<p>If done manually, the user could send data to Ascend to process the updated email address.</p>
eComm Salesforce Integration: Add Additional Data	<p>No. eComm's instance of Salesforce doesn't allow for additional information to be added to Salesforce.</p>	<p>No. eComm's instance of Salesforce doesn't allow for additional information to be added to Salesforce.</p>
Ascend Salesforce Integration	<p>Not automatic or manually managed by eComm.</p> <p>The user could request the data from eComm, process it, and send it to Ascend to be created/updated in Salesforce. Must be familiar with their standards and processes.</p>	<p>The user could send data to Ascend to process manually. Must be familiar with their standards and processes.</p>

## STEP 1 | Create Salesforce Subscription Campaign

The eComm specialist must create a Campaign in Salesforce with a Subscription Form type to start the process. That URL will need to be provided when a subscription form request is submitted (step 2) to the system office.

- Salesforce >> Select **Campaign** tab >> Create **New** Campaign in the top-right >> Check the **Subscription Form** radio button

The screenshot shows the eComm interface. At the top, there is a navigation bar with a cloud icon, a search bar, and a dropdown menu. The 'Campaigns' menu item is highlighted with a blue box. Below the navigation bar, the 'Campaigns' section is visible, showing a 'Recently Viewed' list. The list contains 9 items, each with a number and a campaign name. A white modal box is overlaid on the right side of the screen with the text 'Select a record type'.

	Campaign Name
1	04_20240202_Su
2	04_20200201_Un
3	04_20180401_Ge
4	04_20190120_OI
5	Jen Mortensen CA
6	08_20180430_eC
7	03 ALUM Donor Ta
8	08_ONGOING_Me
9	02 CSPH 091420 Students

- **Name Campaign** per convention below

### Naming Convention

- Subscribe Campaigns | **0X\_Subscribe\_Name/Title**
  - ?with **X** indicating your campus number
- Unsubscribe Campaigns | **0X\_Unsubscribe\_Name/Title**
  - ??with **X** indicating your campus number

- Check the Active checkbox >> Select Save button in the bottom-right

The screenshot shows a web application interface for managing campaigns. On the left, there is a sidebar with a 'Campaigns' icon and a 'Recently Viewed' section. The main area displays a table of campaigns. A modal form is open in the foreground, allowing for the editing of a specific campaign.

**Campaigns Recently Viewed**  
34 items • Updated 23 minutes

	Campaign Name
1	04_20240202_Su
2	04_20200201_Un
3	04_20180401_Ge
4	04_20190120_OT
5	Jen Mortensen CA
6	08_20180430_eC
7	03 ALUM Donor Ta
8	08_ONGOING_Me
9	02 CSPH 091420 S
10	01 SRC CP Spring2
11	04_20201019_Unsubscriber: CCC Office of Research
12	01_20970403_Subscribe: Employee Development Monthly

**Campaign Information**

- \* Campaign Name: 08\_Subscribe\_eCo
- Parent Campaign: Search Campaigns.
- \* Type: Subscriber List
- Description:
- Active: ☒

- Share with Users/Public Groups as needed [22] & create an audience with CAN-SPAM compliance (Report/Data Extension)
  - *Run a Report to see if anyone who subscribed to a certain communication has opted out of the broader email preference category. The user can reach out personally to encourage they opt back in - otherwise, they will not get the*

*commercial emails*).

- You will need to provide the Subscription Campaign URL to request a subscription form (step 1).

## STEP 2 | Submit Request

- Populate columns A-P <sup>[23]</sup>
  - Provide the Campaign Name and URL from Step 1 (column H & I)
- **Submit a help ticket** <sup>[24]</sup> **and anticipate a 5 day turn-around for simple forms.**
  - ?Requests with lots of customization or back-and-forth with embedding will require an extension.

Populate Request Details | Columns A-P <sup>[23]</sup>

## STEP 3 | Launch & Test

Once the subscription form is created, you will be able to test and review it. Once satisfied, you or your user can post the URL publicly and start collecting subscribers.

- Melanie Jones will contact you within 5 days of submitting the request with a live URL to the subscription form (column N)
- **The requester will need to complete a test** (column O) by subscribing and confirming the Salesforce Contact populates in the Campaign as a Campaign Member (created in step 1).

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**Display Title:**  
Subscriptions



**Send email when Published:**

No

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**Source URL:**<https://www.cu.edu/blog/ecommerce/wiki/subscriptions>

**Links**

[1] <https://www.cu.edu/blog/ecommerce/wiki/subscriptions> [2] <https://www.cu.edu/blog/ecommerce/wiki/author/39>  
[3] <https://cu.tfaforms.net/94> [4] <https://cu.tfaforms.net/196> [5] <https://cu.tfaforms.net/204>  
[6] <https://cu.tfaforms.net/199> [7] <https://cu.tfaforms.net/296> [8] <https://cu.tfaforms.net/295>  
[9] <https://cu.tfaforms.net/287> [10] <https://cu.tfaforms.net/286> [11] <https://cu.tfaforms.net/275>  
[12] <https://www.cu.edu/blog/ecommerce/wiki/manage-campaign-members> [13] <https://cu.tfaforms.net/244>  
[14] <https://cu.tfaforms.net/298> [15] <https://cu.tfaforms.net/300> [16] <https://cu.tfaforms.net/185>  
[17] <https://infograph.venngage.com/pl/QJlStQZCbY> [18] <https://help.formassembly.com/help/340359-publish-with-an-iframe> [19] <https://www.cu.edu/ecommerce/formassembly-publish-iframe-testing>  
[20] <https://help.formassembly.com/help/340358-embed-your-forms-html>  
[21] <https://www.cu.edu/ecommerce/formassembly-html-pasted-testing> [22] <https://www.cu.edu/blog/ecommerce/wiki/salesforce-visibility-and-sharing> [23] [https://docs.google.com/spreadsheets/u/1/d/1p59tdgTzK\\_IO-ZlOcuzUaIP5DVpISllePw9\\_ahEfRpE/edit#gid=6745728](https://docs.google.com/spreadsheets/u/1/d/1p59tdgTzK_IO-ZlOcuzUaIP5DVpISllePw9_ahEfRpE/edit#gid=6745728) [24] <https://www.cu.edu/ecommerce/submit-help-ticket>