

## **Tool Overview** <sup>[1]</sup>

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**Not sure what can be accomplished with the suite of tools?** Watch product demos and learn about the most common features used at CU by expanding the items below. If you are interested in a more depth understanding of how the three tools integrate with one another, [our 10 min. overview might be of use](#) <sup>[3]</sup>.

### **Salesforce for Data**

eComm uses Salesforce to house [constituent data](#) <sup>[4]</sup>. Checkout the 1-pager below summarizing the most frequently used items. Already licensed? Follow along with our [Salesforce training for new users](#) <sup>[5]</sup> to learn how to navigate the tools.

# SALESFORCE

ACCESS CONTACTS, REPORTS, CAMPAIGNS AND EMAIL SENDS

## SEARCH & CHATTER



### GLOBAL SEARCH

When you search, you'll get relevant results quickly which makes finding the information you are looking for easy.



### CHATTER

Features such as feeds, profiles and groups are a great way to share information, collaborate, and keep up with the latest data updates at CU.

## CONTACTS & RELATED LISTS



### CONTACTS

A contact reflects a unique individual. There are about 1.5 million contacts with email addresses in CU's Salesforce instance.



### RELATED LISTS or OBJECTS

Objects - or related lists in Salesforce - allow you to view a contact's data including email sends, education, interests, employment, affiliations and more.

## REPORTS & CAMPAIGNS



### REPORTS

Reports offer an efficient way to continually engage a dynamic audience based on data housed in Salesforce. That's because they update automatically based on source system data.



### CAMPAIGNS

Campaigns act as a container to hold a group of contacts who can't be captured with a report. These often include uploaded lists (with system ID) or event invitations.

## INDIVIDUAL EMAIL RESULTS & EMAIL SENDS



### INDIVIDUAL EMAIL RESULTS

Individual email results (IERs) provide information about a single email sent to an individual and how that person responded to it.



### EMAIL SENDS

You can view Email Send Reports in Salesforce that reflect statistics and tracking information from your Marketing Cloud email.

[6]

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## Marketing Cloud for Emails

eComm leverages Email Studio and Content Builder within Marketing Cloud. Checkout a short demo of these features along with a 1-pager summarizing the most frequently used items

below. **Already licensed?** Follow along with our [Marketing Cloud training for new users](#) <sup>[7]</sup> to learn how to clone a pre-existing [CU branded template](#) <sup>[8]</sup> to customize as needed.

# MARKETING CLOUD | CONTENT BUILDER

DESIGN AND SEND YOUR COMMUNICATIONS

## FOLDER STRUCTURE & UPLOAD ASSETS



### FOLDER STRUCTURE

Create a folder structure that works for you and your team to help stay organized.



### ASSET LOCATION

Save all assets — images, content areas, templates, and emails — in the folder that makes sense to you.

## SEARCH & FILTER FUNCTIONS



### SEARCH

Search for an asset by name, within a specific folder, or across all content.



### FILTER

Filter based on content type or drill down further to find a specific type of content block, such as text or an image.

## TEMPLATES & CONTENT BLOCKS



### TEMPLATES

Access and reuse:

- 20 basic templates
- 6 empty templates
- 14 themed templates
- Saved (custom) templates



### CONTENT BLOCKS

An area of an email where you can insert text, links, images, and buttons. You design the layout and input the content of each individual content box.

## DRAG-AND-DROP CONTENT AREAS



### DRAG-AND-DROP

Entire content blocks can be rearranged simply by dragging and dropping into the desired area of the email, making rearranging content easy.



### SAVE & REUSE

Save content areas that you will use over and over again, such as your department footer or social media links.



### CUSTOMIZE

Create a custom message, newsletter, or invitation that works for you and your



### PASTE HTML

Create emails with HTML so you can copy code and paste it into Marketing Cloud to distribute.

[9]

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## **Cvent for Events**

Cvent is eComm's event management application that supports simple (Express) events or complex ones (Flex). Checkout a short demo of Flex [10] along with a 1-pager summarizing the Cvent's most frequently used items below. Already licensed? Follow along with our Cvent training for new users [11] to learn how to clone a pre-existing CU branded template [12] to customize as needed.

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# CVENT

MANAGE YOUR EVENT FROM START TO FINISH - INCLUDING A CUSTOM EVENT WEBSITE, POST-REGISTRATION EMAILS, NAME BADGE PRINTING, AND ATTENDEE CHECK-IN.

## HELP & SUPPORT



### HELP & TRAINING

Search pre-existing resources designed for event planners just like you to get answers to your questions quickly.



### ASK THE EXPERTS

Can't find what you're looking for?

- Open a Case
- Chat with Cvent
- Call Cvent

## STANDARD VS. EXPRESS REGISTRATION



### STANDARD

Standard registration supports most events at CU. Easily turn features on/off to create a custom experience.



### EXPRESS

Just need a count of who's coming? Express is a simplified version of Standard and does not support complex features like guest registration and sessions.

## EVENT WEBSITE & WIDGETS



### EVENT WEBSITE

Design a gorgeous event website that matches your unit's look and feel.



### WIDGETS

*A web widget is a tiny program you can embed in another website. Display a countdown to the event, or show the number of spots remaining and include a Register Now button.*

## STANDARD REGISTRATION FEATURES (OPTIONAL)



### REGISTRATION QUESTIONS

Discover your invitee's needs and expectations before the event with questions. You can even attach questions to individual sessions so your invitees are only asked questions that apply to them.



### REGISTRATION PATHS

Use your registration types to further personalize the registration process by creating additional paths and customizing the content or payment options for each.



### SESSIONS

A session is a presentation, discussion, or activity. Optional sessions can have a different capacity and fee than the event.



### GUESTS

Guest registration records who your invitees are planning to bring to the event. Guests can be free or paid for by the individual registrant.

[13]

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## Related Wikis

- Add to Account [14]
- Submit Help Ticket [15]
- Tool and Data Model [4]
- New User Training | Marketing Cloud [7]
- New User Training | Cvent [11]
- New User Training | Salesforce [5]

### Display Title:

Tool Overview

### Send email when Published:

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[3] <https://www.youtube.com/embed/xxWKqtfS4S8> [4] <https://www.cu.edu/ecommerce/strategy/data-model-tools> [5] <https://www.cu.edu/blog/ecommerce-wiki/salesforce-new-user-training> [6] <https://www.cu.edu/doc/tool-featuresalesforce20171105pdf> [7] <https://www.cu.edu/blog/ecommerce-wiki/marketing-cloud-new-user-training-old1> [8] <https://www.cu.edu/ecommerce/guidelines/ecommerce-email-templates>  
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[13] <https://www.cu.edu/doc/access-cvent20171105pdf-1> [14] <https://www.cu.edu/blog/ecommerce-wiki/add-account> [15] <https://www.cu.edu/node/20149>