Changes to Business Units [1]

September 8, 2023 by lauren.galena [2]

eComm, with input from the campuses, implemented a simplified Marketing Cloud business unit and preference model across all campuses in Summer 2023 aiming to reduce costs, streamline the constituent experience, and decrease the level of backend management needed. The optimization project reduced the number of business units by 50%. eComm will still accept requests for adding/renaming/deleting business units, however, consideration will be taken to determine if a new business unit is needed or if it makes more sense to add a folder for the new unit in an existing business unit. This wiki contains a few elements to consider when requesting to add/rename/delete a business unit.

As a reminder, starting July 1, 2023, eComm will no longer accept requests for adding/renaming/deleting business units through the quarterly process. If you have an exceptional circumstance that requires adding/renaming/deleting a business unit, please review this wiki and submit a ticket [3].

FOR eCOMM SPECIALISTS Following completion of the work you requested, you will be responsible for completing a few remaining tasks to set your user up for success. Please refer to Post-Request Responsibilities at the bottom of this wiki for more information.

- Business Units
- Email Preferences

When requesting a change to a business unit, you’ll be asked to provide information based on the type of work you are requesting.

Adding a New Business Unit

- Preferred name of business unit (note the 50-character limit including the campus).
- (CU Boulder Only) Preferred Salesforce visual force header name (i.e. CU Office of the President Communications). This is the header that contains different sets of email preferences based on college, unit, department, purpose, etc.
- Primary email address associated with the business unit (i.e. contact@cu.edu [4]).
- Primary email display name associated with the business unit (i.e. CU System University Relations).
Email Information

Email Display Name *(required)*
CU System University Relations

Email Reply Address *(required)*
contact@cu.edu

Physical Address

Inherit from parent business unit

Company Name
Office of the President

Street Address
1800 Grant Street, Suite 800

City
Denver

State/Province
CO

Zip/Postal Code
80203
• Names of users who should be assigned to the business unit.
• Salesforce public group that should be associated with users of the business unit.

Additionally, you'll need to provide information about the email preferences that should be associated with the business unit. See the "Email Preferences" tab for more information.

**Renaming an Existing Business Unit**

• Current business unit name.
• Current business unit MID.
• Preferred new name of business unit (note the 50-character limit including the campus).
• (CU Boulder Only) Preferred Salesforce visual force header name. This is the header that contains different sets of email preferences based on college, unit, department, purpose, etc.
• Primary email address associated with the business unit (i.e. contact@cu.edu).
• Primary email display name associated with the business unit (i.e. CU System University Relations).
• Salesforce public group that should be associated with users of the business unit.

Additionally, you'll need to provide information about the email preferences that should be associated with the business unit. See the "Email Preferences" tab for more information.

**Deleting an Existing Business Unit**

• Current business unit name.
• Current business unit MID.
• Names of any users that need to be reassigned from this business unit.

Additionally, you'll need to provide information about the email preferences that are associated with the business unit. See the "Email Preferences" tab for more information.

When requesting a new business unit, you'll be asked to provide the following information.

**Adding a New Email Preference**

• The preferred email preference name (note the 40-character limit including the campus) (i.e. CU System Information Services). This will appear on both the Salesforce visual force pages and the constituent-facing Marketing Cloud subscription page.
CU System Resources

- CU System Office of Information Security
  Communications from CU System Office of Information Security (OIS)

- CU System Policy, Efficiency, and Audit
  Communications from CU System Policy, Efficiency, and Audit

- CU System Office of the Controller
  Communications from CU System Office of the University Controller (OUC)

- CU System Procurement Service Center
  Communications from CU System Procurement Service Center

- CU System Information Services
  Communications from CU System University Information Services (UIS)

[Confirm]

View all University of Colorado email lists.
<table>
<thead>
<tr>
<th>Email Preference Description</th>
<th>Note the 510-character limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications from CU System University Information Services (UIS))</td>
<td>(i.e. Communications from CU System University Information Services (UIS))</td>
</tr>
</tbody>
</table>
The business unit MID with which the preference should be associated

Changing an Existing Email Preference

- The name of the existing email preference.
- The preferred email preference name *(note the 40-character limit including the campus)* (i.e. CU System Information Services). This will appear on both the Salesforce visual force pages and the constituent-facing Marketing Cloud subscription page.
CU System Email Preferences

- CU Connections
- CU President Communications
- CU System COLTT
- CU System Employee Services
- CU System Events & Outreach
- CU System Faculty & Staff Council
- CU System Giving Opportunities
- CU System Government Relations
- Thank You Emails

CU System Information Services

- CU System Office of Academic Affairs
- CU System Office of Information Security
- CU System Office Outreach & Engagement
- CU System Office of the Controller
- CU System Policy, Efficiency, and Audit
- CU System Procurement Service Center
- CU System Advancement Communications and Events
The email preference description (note the 510-character limit) (i.e. Communications from CU System University Information Services (UIS)). This will appear on the constituent-facing Marketing Cloud subscription page.
The business unit MID with which the preference should be associated.

**Deleting an Existing Email Preference**

- The name of the existing email preference.
- The business unit MID with which the preference is associated.

**Post-Request Responsibilities**

- Business Units
- Email Preferences

When the System eComm team has completed processing your business unit request, they
will notify you that the work is complete. You will be responsible for the following:

**Adding a New Business Unit**

- Sharing any content from other business units with the new business unit that the users will require for their communications.
- Building send classifications, sender profiles, and delivery profiles.
- Ensuring that the appropriate Salesforce campaigns are shared with the correct public group.
- Ensuring that the appropriate Salesforce reports are housed in the correct report folder.
- Rebuilding data extensions as needed if a new business unit has been created or if a user has been reassigned to the new business unit.
- Working with your users to provide additional instructions (selecting the correct audience, understanding naming conventions, etc.).

**Renaming an Existing Business Unit**

- Ensuring that the appropriate Salesforce reports are housed in the correct report folder.
- Rebuilding data extensions as needed if a user has been reassigned.
- Working with your users to provide additional instructions (selecting the correct audience, understanding naming conventions, etc.).

**Deleting an Existing Business Unit**

- Sharing any content that users will require for their communications to be saved with a surviving business unit.
- Rebuilding send classifications, sender profiles, and delivery profiles in the surviving business unit, if applicable.
- Ensuring that the appropriate Salesforce campaigns are shared with the correct public group.
- Ensuring that the appropriate Salesforce reports are housed in the correct report folder.
- Rebuilding data extensions as needed if a user has been reassigned to a surviving business unit.
- Working with your users to provide additional instructions (selecting the correct audience, understanding naming conventions, etc.).

When the System eComm team has completed processing your email preference request, they will notify you that the work is complete. You will be responsible for the following:

**Adding a New Email Preference**

- Building audience reports to ensure they filter based on the correct preference. Tasks
may include:
  ○ Building new Salesforce reports.
  ○ Building new data extensions.
  • Training your users about naming conventions and which preference(s) to select for their communications.

Changing an Existing Email Preference

  • Modifying audience reports to ensure they filter based on the correct preference. Tasks may include:
    ○ Modifying preference used in Salesforce reports.
    ○ Modifying Salesforce report names.
    ○ Modifying data extension name in Interactions >> Import AND Salesforce Data Extensions.
  • Training your users about naming conventions and which preference(s) to select for their communications.

Deleting an Existing Email Preference

  • Modifying audience reports to ensure they filter based on the correct preference or delete/archive audience reports that are no longer needed. If the audience reports are still needed, tasks may include:
    ○ Modifying preference used in Salesforce reports.
    ○ Modifying Salesforce report names.
    ○ Modifying data extension names in Interactions >> Import AND Salesforce Data Extensions.
  • If the audience reports are no longer needed, tasks may include:
    ○ Moving Salesforce reports to an archive folder or deleting the reports. **Note: If you think reports may need to be updated and used in the future, archive them. If reports are no longer needed and won’t need to be updated in the future for use, delete them.**
    ○ Moving data extensions to an archive folder in Marketing Cloud Salesforce Data Extensions and adding a z to the data extension name (i.e. z08 UREL All Staff SUB PCom) in Interactions >> Import or deleting data extensions in Interactions >> Import AND Salesforce Data Extensions. **Note: If you think data extensions may need to be updated and used in the future, archive them. If data extensions are no longer needed and won’t need to be updated in the future for use, delete them.**
  • Training your users about which preference(s) to select for their communications going forward, if applicable.

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Changes to Business Units

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Links
[1] https://www.cu.edu/blog/ecomm-wiki/changes-business-units