eComm Event Management [1]

September 21, 2025 by melanie.jones@cu.edu [2]

Availability eComm Event Management is only available to a small group of users currently. It will be made available to all existing Salesforce users in mid-November.

eComm Event Management is a Salesforce solution for managing simple, free events. These types of events have a limited amount of customization and features, which makes launching an event quick and easy.

Registrant Experience

See for yourself what the registrant experience is like, including the emails they will receive.

Event Registration & Emails

- Registration Process
- Emails

Event Registration Website

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

CU at the Zoo

Join us for a fun night with fellow alumni and family!

Session Information

Start Date/Time: 9/30/2025 1:00 PM   **End Date/Time:** 9/30/2025 4:00 PM

Modality: In-Person

Guests: This session allows guests.

Address: 1 Lincoln Drive

Contact Information

If you have any questions about this session, please reach out to:

Elizabeth James

james@cu.edu

Register

Registrant Information

Registrant Information

*First Name

Mel

*Last Name

Jones

Pronouns

--None--

*Affiliation

☐ Affiliate
☑ Alumni
☐ Community Member
☐ Donor
☐ Faculty
☐ Staff
☐ Student

*Email

meljones225@gmail.com

*Confirm Email

meljones225@gmail.com

Registration Questions

Do you have any accessibility needs?

No.

Do you have any questions about the event?

Can we stay after 4PM?

What is your t-shirt size?

M

Guest Information

Would you like to bring guests? ☑ Yes

Number of Guests (Maximum: 5)

3

Previous   Next

Confirmation Page

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

CU at the Zoo

9/30/2025 7:00 PM

Your registration is confirmed. See your email confirmation for full details.

Event Contact Information:

Elizabeth James

james@cu.edu

If you are interested in registering for multiple sessions, you may do so after selecting Finish below.

Finish

Registration Confirmation

You're Registered for CU at the Zoo ➤ Inbox ×

University of Colorado <contact@cu.edu>
to me ▾

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Melanie,

Your registration is confirmed. See your email confirmation for full details.

CU at the Zoo

Join us for a fun night with fellow alumni and family!

When: Tuesday, September 30 2025 | 1:00 PM | In-Person
Where: 1 Lincoln Drive

Who to Contact: Elizabeth James, james@cu.edu

University of Colorado
1800 Grant Street, Suite 800 | Denver, CO 80203

Modify or Cancel Registration

Cancellation

Event Registration Update for CU at the Zoo ➤ Inbox ×

University of Colorado <contact@cu.edu>
to me ▼

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Melanie,

Your registration is cancelled. We hope to see you at another CU event.

CU at the Zoo

Join us for a fun night with fellow alumni and family!

When: Tuesday, September 30 2025 | 1:00 PM | In-Person
Where: 1 Lincoln Drive
Who to Contact: Elizabeth James, james@cu.edu

University of Colorado
1800 Grant Street, Suite 800 | Denver, CO 80203

Know Before You Go (KBYG)

Note that KBYG is only sent if the event manager has enabled this email 6+ days before the session start date. This email is sent automatically 5 days before the session starts.

Event Creation

The eComm Event Management solution is intended for simple, free events - but there are still many components to configure.
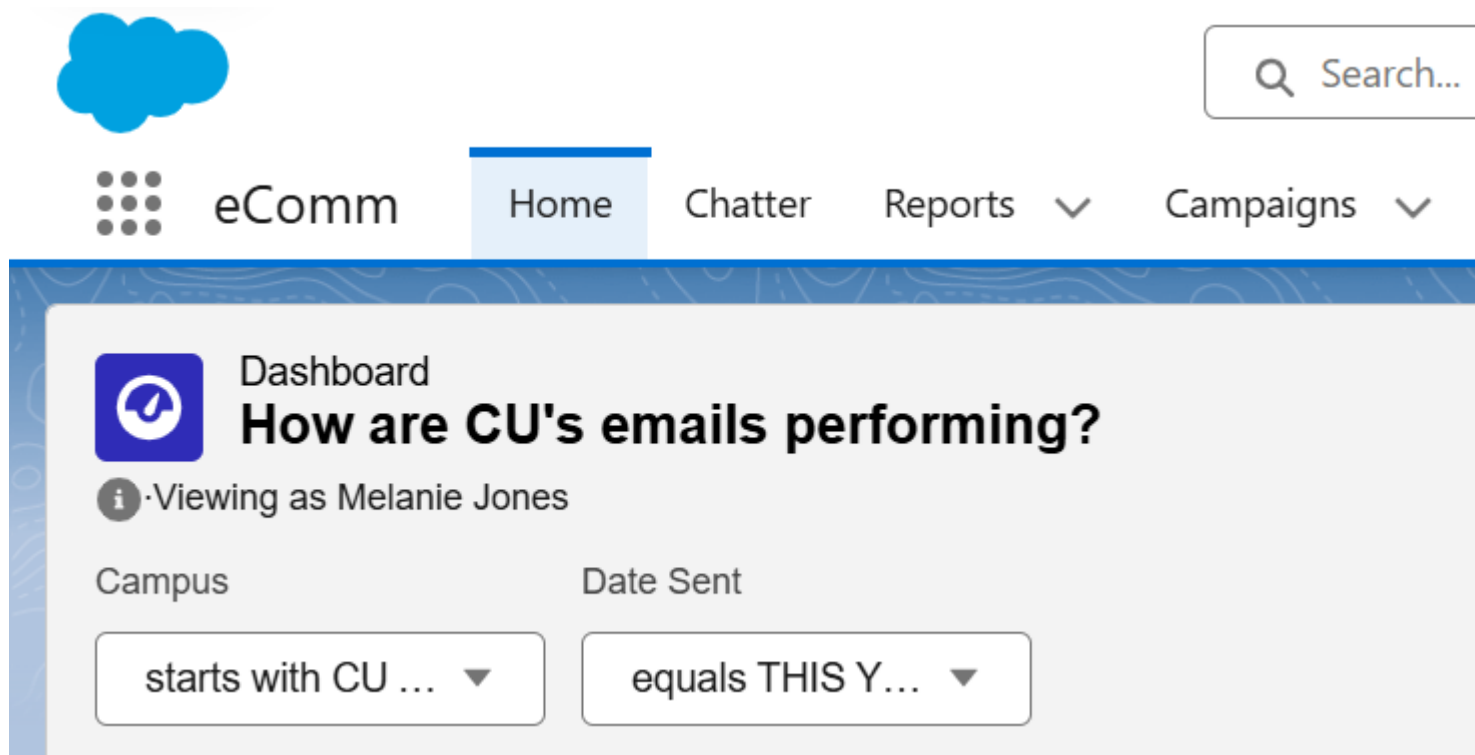
Login & Add 'Event Management'

Log in to Salesforce

- Navigate to the eComm login page [3]
- Select Salesforce (left)
- Select your campus and input your single sign-on (SSO) University credentials

Add Event Management to Navigation

- Select the pencil icon in the far right of the top navigation

- In the pop-up, choose the *Add More Items* **button** in the top right

Edit eComm App Navig

Personalize your nav bar for this app. Reorder items, and

Learn More ⓘ

em

·Vie

Date

NAVIGATION ITEMS (12)

≡ 🏠 Home

≡ 〽️ Chatter

ed

≡ 📊 Reports

al E

≡ ◎ Campaigns

ll rig

≡ 🕐 Dashboards

≡ 📇 Contacts

300

≡ ✉️ Email Sends

200

≡ 〰️ Cvent Dedupe

100

Reset Navigation to Default ⓘ

- Select **All** in the left navigation.

- Search for 'Event' to find Event Management.
  - If you cannot find 'Event Management', you do not have access. Users need to work with their eComm specialist to get access.????
- Click the **plus sign next to *Event Management***

Available Items

Favorites

All

Q event

0 items selected

+ Event Management

Event eComm Owner

- Once checked, select the ***Add 1 Nav Item* button** in the bottom right

Add Items

Available Items

Favorites

All   1

Q event

Event Management X

1 item selected

✓ **Event** Management

- You can drag-and-drop items to change their display order.

- Click the blue Save button in the bottom right

Edit eComm App Naviga

Personalize your nav bar for this app. Reorder items, and r

Learn More ⓘ

NAVIGATION ITEMS (13)

≡ 📁 Email Sends

≡ 🔵 Cvent Dedupe

≡ 🚗 Configurations

≡ 🤝 *Event Management*

≡ 👥 Attendees

≡ 📅 Simple Events

≡ ⏰ Sessions

Reset Navigation to Default ⓘ

- Event Management will now be found in the top navigation (although the order and

options may vary)

Create Event & Session(s)

- Written Instructions (with Screenshots)
- Video Instructions

Event Management

- Select Event Management in the top navigation (see login instructions above)

eComm   Home   Chatter   Reports ∨   Campaigns ∨

Event, Session, and Attendee Managemer

Select an action below

* Select an Action

EVENT - Create New

EVENT - Edit Existing

Create Event

- Select the first *EVENT - Create Event* icon
- Click the blue *Next* button in the bottom right

- Populate details for the event. Then*, click the blue "Next" button* in the bottom right.
    - **Campus |** Indicate the Campus you are employed at (not where your event is hosted). This also determines which campus logo and footer will display on registration pages and the from information used in emails.
    - **Description |** There is a 1000-character limit at this time. The event description appears on the event registration site and in all of the automatically sent emails to attendees.
    - **Status (active, planning, canceled, closed, inactive) |** Only events in the active or planning stage show up on the list to edit an existing event. You may want to manage other status as you track data about your events over time.
    - **eComm Event Owner |** Search for your name (this is the person in Salesforce creating the event, which is different from the Event Planner, found in the section below). This allows you to manage this event in the future.
    - **If the planner information is the same as the event contact information for all sessions, check this box |** Note: every event will have at least one session (defined on a later page)
- Details will be displayed in your event registration and emails for constituents to view.

Q Search...

Create an Event

Provide general information about your event and agree to the event creation conditions

Event Information

* Type

Celebration/Reception ⏷

* Campus

System

* Name/Title

CU at the Zoo

* Description

Join us for a fun night with fellow alumni and family!

* Start Date ⓘ

Sep 30, 2025   📅

* End Date ⓘ

Sep 30, 2025

* Status

Planning ⏷

* eComm Event Ow

👤 Melanie Jon

Event Planner Information

* Planner Name

Elizabeth James

* Planner Email

elizabeth.james@cu.edu

☑ If the planner information is the same as the event contact information for all sessions, check this box

Event Conditions

- This event is a free event for participants, with no financial transactions for participants, including tools external to Salesforce.
- This event and its communications will not violate HIPAA, and I acknowledge that eComm's Salesforce and Marketing Cloud tools are not HI
- This event and its communications will not violate FERPA.

☑ I certify that the statements above are true

Image, Registration Confirmation & Cancellation Messages

- Upload an image that will be displayed under your campus logo on the registration page. If no image is uploaded, the registration site will show a broken image icon.
  - Note: When you upload an image, a pop-up appears to select *Done*. Once the pop-up is gone, there is no indication that the image has been uploaded (although it has).
- Event Image Alt Text is an accessibility best practice [4] and is required.
- Provide text that will display for the registrant after they register, modify, or cancel. These fields have a 300-character limit.
- Select the blue *Done* button in the bottom right.

Image Notes

- The image name is limited to 40 characters.
- Uploaded images should be between 400-1000 pixels wide. Uploading oversized images can impact how the registration pages display. You can edit the event and change the image later if you wish.

Event Registration Website and Email Information

Upload an image for your event and customize registration confirmation/cancellati

- **<u>Uploading an image and alt text is required.</u>**
- **<u>Image file type must be .png, .jpg, or .jpeg.</u>**
- **<u>Image file name should only include alphanumeric characters and not exceed 40 char</u>**

Upload Event Image

⬆ Upload Files   Or drop files

*Customize your Registration Confirmation Message below:

Your registration is confirmed. See your email confirmation for full details.

*Customize your Registration Cancellation Message below:

Your registration is cancelled. We hope to see you at another CU event.

Create a Session

- Every event needs at least 1 session.
- Event date vs Session date
  - Why enter the date more than once? This is because some events could span a few days and within that, you can have multiple sessions.
- Attendees are emailed session information, specifically for what they registered for.
- Populate details for a session.
  - Hybrid Event Tip | If you want to limit capacity for a hybrid event where in-person and virtual sessions have different limits, a best practice is to set up two different sessions - one in-person and one virtual for the same day/time with different capacities set for each. Otherwise, if you choose hybrid for modality, and set a capacity, it will apply the capacity to the total from the in-person and virtual

sessions.
- Session Contact
    - The session contact can be different than the event owner. The session contact information is shown on the event registration site and in all emails sent to attendees.
- Many additional options can be enabled for a more robust event, including:
    - 1 | Would you like to set Registration Open and Close dates/times?
    - 2 | Do you want to allow registrants to bring guests?
        - If you enable all guest details, the attendee will need to enter name, email, etc for the guest, although email is not required for guests. If an email is entered for a guest, they will be matched to an existing contact or created as a standard contact in eComm's Salesforce. If no email is entered, the guest will appear on your registered list but will not be created as a contact in Salesforce.
        - If you enable only number of guests, when attendees register they will be prompted to enter their number of guests. It will tell them what the guest limit is.
        - If an attendee registers with guests and later cancels their registration, it will cancel their guests as well.
    - 3| Would you like to receive communications from the University of Colorado beyond information about this event?
        - This should only be used if you intend to manually track or add folks to a subscription list or otherwise manually use this data. There are no automations for this question at this time.
    - 4 | Additional Sessions
- Event Registration URL
    - The event registration URL is populated in a dashboard you can access after you complete the build a session step. The confirmation message at the end of this step has a link to the dashboard.

Create a Session

Provide information about the first event session below. You'll be able to add multiple sessions if needed.

* Session Start Date/Time

| Sep 30, 2025 | 🗓 | 1:00 PM | 🕐 |

* Session End Da

Sep 30, 2025

Would you like to set Registration Open and Close dates/times? [✓ ○]
Yes

Registration Open Date/Time

| Sep 17, 2025 | 🗓 | 7:00 AM | 🕐 |

Registration Clos

Sep 28, 2025

* Modality (In-Person/Hybrid/Virtual)

In-Person

* Address

1 Lincoln Drive

Attendee Capacity (Leave blank if unlimited)

Do you want to a

* Session Contact Name

Elizabeth James

* Session Contact Email

james@cu.edu

Guests

* Maximum Number of Guests per Participant

5

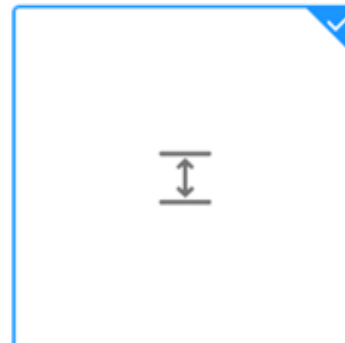* Do you need to know only the numbe

--None--

Registration Questions

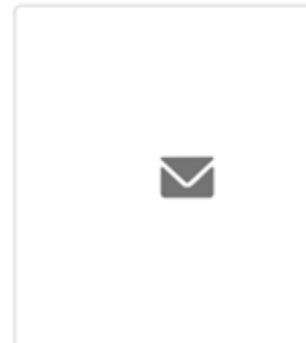**Select registration questions to display:**
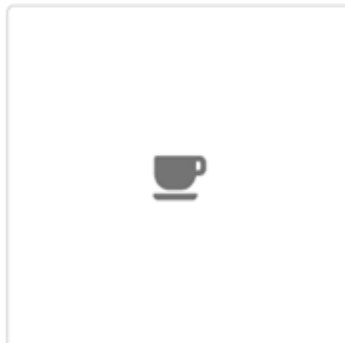
| ☕ | ? | ⤒ | ✉ |

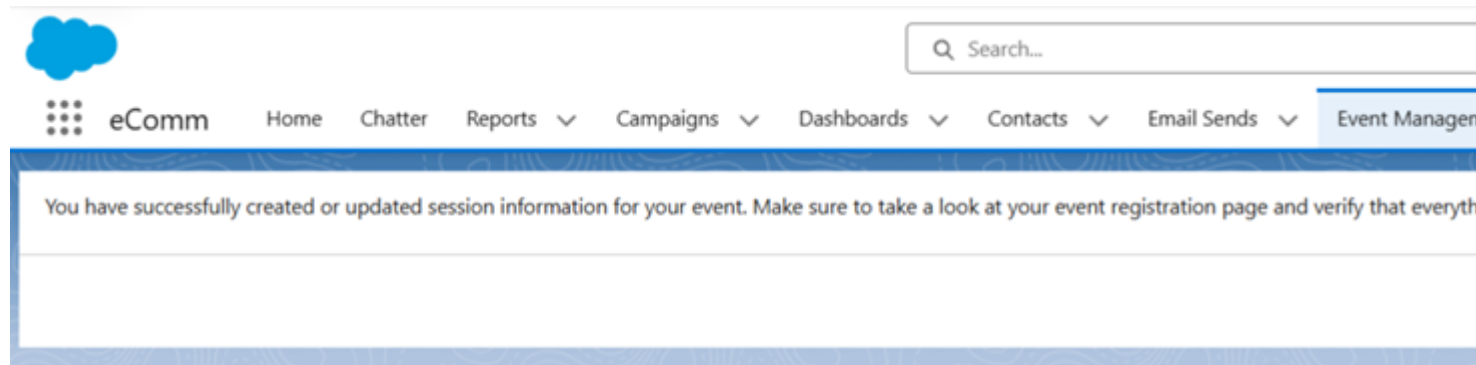| Do you have any dietary preferences? | Do you have any questions about the event? | What is your t-shirt size? | Would you like to receiv communications from th University of Colorado bey information about this eve |

Your event has been created!

Coming soon...

Edit Event & Session(s)

- You can edit existing events or sessions by navigating to *Event Management* in the top navigation.
- Select the action you wish to take, then click the blue *Next* button in the bottom right.

Accessibility

- Every event has an open text question asking the participants if they have any accessibility needs. This cannot be removed from the event.
  - Event managers are expected to monitor responses to this question via one of the event dashboards and communicate with participants as needed.

- Event managers can add general statements about accessibility in the event description, event emails (event confirmation and KBYG) or send additional emails through Marketing Cloud.
- If you need to reach out to a particular registrant, do so via an Outlook message. See the Dashboard & Reports section below for details.

IMAGE / See Dashboard section???

Emails

There are many emails that will be sent to the registrant throughout the event lifecycle.

Automatic Registrant Emails | Confirm, Modify, Cancel & KBYG

Attendees are emailed session information, specifically for what they registered for. Email templates are not customizable, although the text that goes in the body of the email is customizable. The event owner fills out these details when creating the event.

Registration Confirmation & Cancellation | Required

- Emails confirming registration or cancellation are automatically sent at the time the action is taken.

Know Before You Go (KBYG) | Optional

- The event manager can enable or disable the KBYG email. If there is any text in the KBYG field sections, the email is enabled.
- The KBYG email is sent 5 days before the session starts. Additional KBYG messages would need to be sent via Marketing Cloud.

Automatic Event Owner/Creator Emails | Close

If a registrant close date/time is set, the owner and event creator will get an email reminder that registration is closing 5 days before. You can change the close date/time if desired.

PIC

Event URL

The event URL can be found within a Salesforce Dashboard [5] intended for users.

- Navigate to the Dashboard [5].
- Events that only you own will display.

- The first component lists your events in order of Start Date, with a column for the event URL, which can be copied.

eComm · Home · Chatter · Reports · Campaigns · Dashbo

Dashboard
Simple Event for Basic User
'My Event' Reports - for users to export for check-in, nametags, etc
As of Sep 19, 2025 4:47 PM· ⓘ ·Viewing as Diamond Darling

Event Status	Session Start Date/Time
All ▾	All ▾

Want to better understand this dashboard? Scroll to the 'Dashboard & Reports' section

Event Summary

Registration URL (to promote)

Event Status	Event Start Date ↑	
Active		9/2

View Report (Event Report - Sessions & Attend MY EVEN)

Invitations

Invitations can be sent by email via Marketing Cloud, included in social media, or promoted in

other ways. If sending invites through Marketing Cloud, work with your eComm specialist on an audience list.

Registrant Management

From helping folks get registered to tracking their attendance, there are many ways to registrant management.

Register Attendees

Attendees can be registered by going to the event registration site (find the URL via the event management dashboard) or by manually adding them to the event in Salesforce. To add attendees to an event:

- Navigate to *Event Management* >> select *Attendees - Add to Session* >> click the blue *Next* button
- Select the event and session, then input registrant details.
- Note: At this time, when you manually add attendees to a session in Salesforce, they will not receive a confirmation email. They do receive a confirmation email when registered for the event via the event registration site.

Event, Session, and Attendee Management

Select an action below

___

* Select an Action

EVENT - Create New

EVENT - Edit Existing

EVENT - Clone Existing

SESSION - Clone Existing

SESSION - Edit Existing

ATTENDEES - Check In

View Contact Engagement

- *Contact* record > *Related* tab > *Simple Event Attendance*

Check In Attendees

Within Event Management, select

Event, Session, and Attendee Management

Select an action below

---

*Select an Action

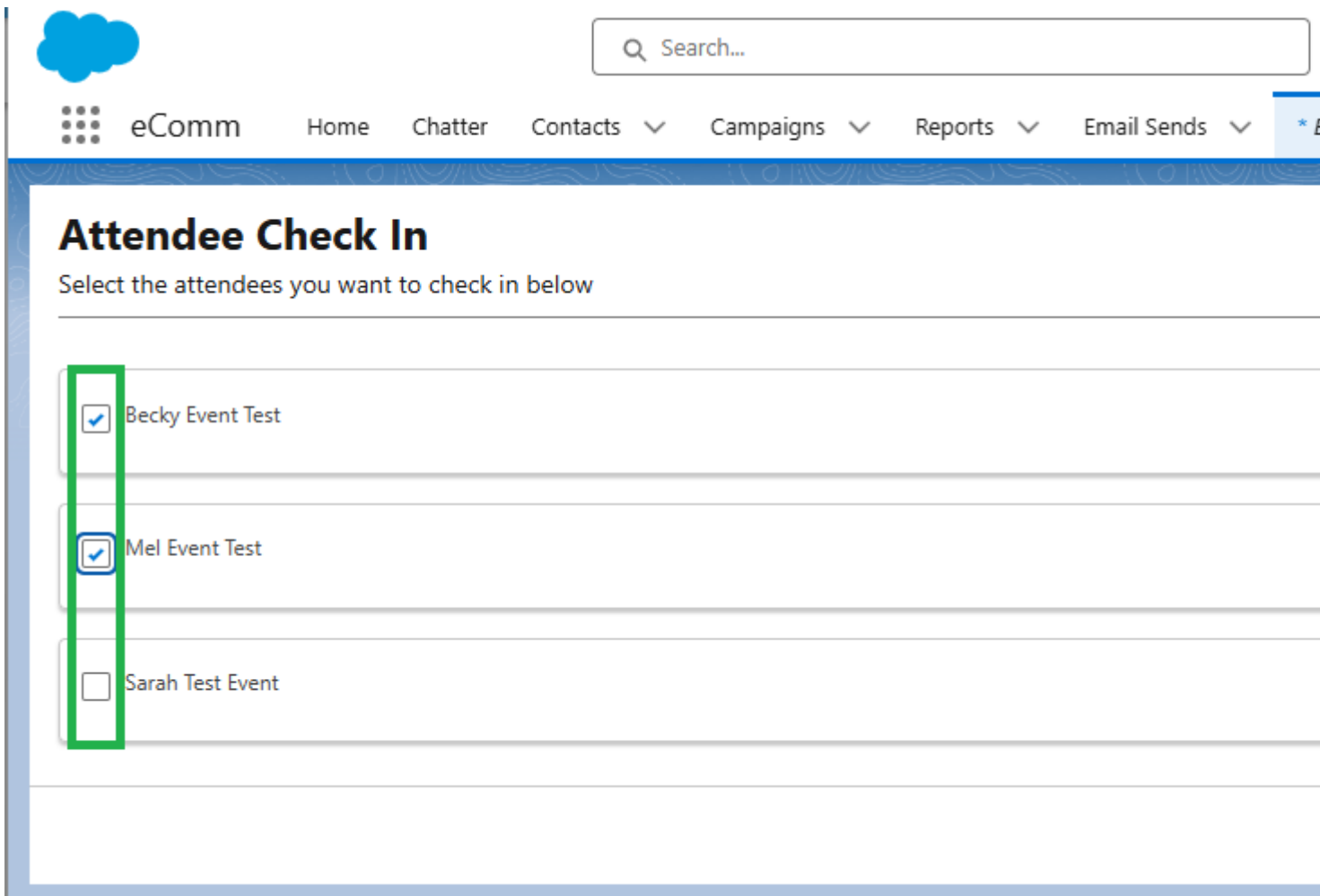|		
📅	📝	📋
EVENT - Create New	EVENT - Edit Existing	EVENT - Clone Existing
📋	✏️	👥
SESSION - Clone Existing	SESSION - Edit Existing	ATTENDEES - Check In

- Select the event and session which you want to check attendees in for.
- Check the boxes next to the names of attendees.
- Select the blue *Next* button.
- Those with participation tracked will have a status of *Attended*, those who have not will have a status remain as *Registered*.
- You can exit out of this area and come back to check in more attendees. Only attendees

with a status of Registered who are not checked in will appear.

Understand Attendee Data

- The name and information the attendee enters when registering is viewable on the event reports (see Dashboard & Reports below) as they entered it. However, if their email matches an existing Contact, the name on the contact record does not update. For example:
  - An Attendee who already exists in eComm with the name Jim Jimster and the email address of jim@email.com [6]
  - If Jim's wife registers for an event with the name Sally Jimster and the email address jim@email.com [6]:
    - These details are reflected on the event reports.
    - A new Standard Contact for Sally will not be created.
    - The event registration will be added to Jim's contact record (since it matches on email alone, similar to Cvent).

- Once you have checked an attendee in, the participant status field updates to *Attended*. This can be viewed via an Attendee Report (see Dashboard below??) or if you go to the Contact record > Related > Simple Event Attendance

- If the attendees are not checked in and the event passes, their status is Registered (but they need to confirm)??
- Attendees are matched to existing contacts on email only. If it exists, it adds the event information to that contact record. If they don't exist, it creates a Standard Contact (like Cvent).
- Guests
  - If guests are enabled for the event, they are matched to an existing contact or created as a standard contact with these conditions:
    - The event requires guest details and not only number of guests
    - The guests email address was entered (email is an optional field for guests)
  - Guests will appear on a registration list if all guest details are enabled for the event and at least their name is entered when registering. Their Record Type is Guest, which is viewable on the contact record and in Dashboards/Reports. When viewing Dashboards/Event Reports there are columns related to attendee record type and who the person is a guest of, if you would like that information.

Dashboard & Reports

A Dashboard is available for event owners to manage aspects of their events [5], from event creation through closure and beyond.

How-To Use Dashboard & Reports

- Dashboard
- Reports

Refresh

- Select the Refresh button in the top right to ensure you are seeing the most recent data.
- You will see a date/time in the top left, under the Dashboard title, for when it was last refreshed.

eComm

Home | Chatter | Contacts ⌄ | Campaigns ⌄ | Report

Dashboard
Simple Event for Basic User
'My Event' Reports - for users to export for check-in, nametags, etc

As of Sep 19, 2025 4:22 PM · ⓘ · Viewing as Diamond Darling

Event Status	Session Start Date/Time
All ▼	All ▼

Want to better understand this dashboard? Scroll to the 'Dashboard & Reports' section

Event Summary

Filters

- Apply Dashboard filters if desired. It's usually best to apply only one filter at a time.

eComm   Home   Chatter   Contacts ∨   Campaigns ∨   Report

Dashboard
Simple Event for Basic User
'My Event' Reports - for users to export for check-in, nametags, etc
As of Sep 19, 2025 4:22 PM· ⓘ ·Viewing as Diamond Darling

Event Status

| All ▼ |

Session Start Date/Time

| All ▼ |

Want to better understand this dashboard? Scroll to the 'Dashboard & Reports' section

Event Summary

Open

- Dashboard components are all based on a Report. Open/Run a *Report* by clicking on the link in the bottom right of each component.

Registration URL (to promote)

Event Status	Event Start Date ↑	
Active		9/

View Report (Event Report - Sessions & Attend MY EVEN)

Export

- Then, in the top right, select the down arrow next to *Subscribe*. Click *Export* in the dropdown.

Subscribe

- You can *Subscribe* yourself (and other Salesforce users) to Reports to be notified via email.
  - Note: Non-Salesforce users cannot be subscribed.
- Dashboard *Filters* and Report *Conditions* can be set to only be notified of recent activity.

Dashboard Components / Uses

Scroll through the Dashboard to view and use different components depending on your use case.

- Event Summary
- Attendee Counts
- Registrant Records
- Participation/Attendence

Event Summary

Registration URL (to promote)

Event Status	Event Start Date ↑	Event Name/Title
Active	9/23/2025	CU at the Zoo
Planning	9/23/2025	CU at the Zoo 2

View Report (Event Report - Sessions & Attend MY EVEN)

Events by Status

Event Name/Title
- CU at the Zoo
- CU at the Zoo 2
- CU at the Zoo 3

View Report (Event Report Statu- Ses...   As of Sep 19, 2025 3:22 PM

Event Type

Record Count

12

- At
- Class/Works
- Informa
- Lect
- Meeting
- Celebratio

View Report (Events Report by Status and Type)

Attendee Summary

Attendee Count by Event Title & Date

Sum of Total Registered Attendees

Event Start Date ■ 9/25/2025

View Report (Event Report - Sessions & Attend MY EVEN)   As of Sep 19, 2025 4:47 PM

Attendee Tot

Internal Staff

General Session

View Report (Eve

Event Primary Attendee & Guest Count

Event Name/Title ↑	Sum of Number of Guests	Sum of Total Registered Attendees	ƒx Guests
Internal Staff Event	0	1	1.00

Sessions Prin

Event Name and

Internal Staff Ev

Use the table of attendees for all registrant details, so you can:

- See who's coming or if they have special requests.
- Export and print it to use for check-in or print nametags.

Attendees (View Attenddes, Print for Check-in or Nametags)

Event Name and Date ↑	General Session Information	First Na...	Last N...	Prono...	Affilia...
Internal Staff Event - Thursday, September 25 2025	Thursday, September 25 2025 | 9:00 AM | Virtual	Sarah	Test Event	-	Affiliate
Internal Staff Event - Thursday, September 25 2025	Thursday, September 25 2025 | 9:00 AM | Virtual	Becky	Event Test	-	Faculty
Internal Staff Event - Thursday, September 25 2025	Thursday, September 25 2025 | 9:00 AM | Virtual	Mel	Event Test	-	Affiliate

Event by Participant Status

Record Count
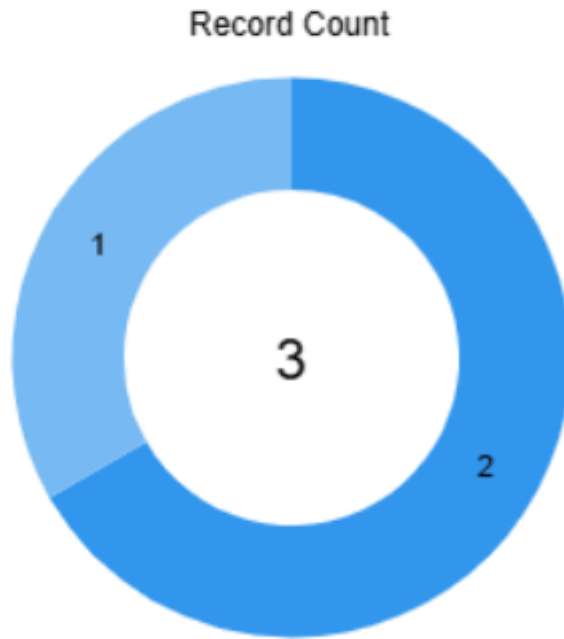
View Report (Event Report - Sessions & Attend P Stat)   As

Display Title:
eComm Event Management
Send email when Published:
No

Source URL:https://www.cu.edu/blog/ecomm-wiki/ecomm-event-management

Links
[1] https://www.cu.edu/blog/ecomm-wiki/ecomm-event-management [2] https://www.cu.edu/blog/ecomm-wiki/author/145641 [3] https://www.cu.edu/ecomm/login [4] https://www.cu.edu/blog/ecomm-wiki/accessibility-best-practices
[5] https://cuecomm.lightning.force.com/lightning/r/Dashboard/01ZHs0000024PjuMAE/view
[6] mailto:jim@email.com