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eComm Specialist Digest | March 1, 2023 [1]

March 1, 2023 by Melanie Jones [2]

General Updates

- **Cvent Payment Processing Issues**: The System team completed notifications for 450 failed transactions by reaching out to both the event planner and the card holder. Treasury should be processing these transactions by the end of the week.
    - **Reminder**: Use the checklist to approve ALL paid/fundraising events [3]. Do not approve paid or fundraising events with any special characters in the title [4].
- **User session, Manage Salesforce Campaigns [5] |** We had a wonderful turnout with over 30 folks at our Feb. 16 session to empower users to manage Salesforce Campaigns independently (when possible). If a Report or Data Extension is based on a Salesforce Campaign, users can add/remove Campaign Members and create new Contacts to manage small changes (less than 20) without involving an eComm specialist.
    - ***We have already had users create 30 new contacts!***
- **eComm specialist, New User Onboarding Journey [6] |** The recording of the optional New User Onboarding review session on Feb. 13 has been published to the existing wiki, including full details and email screenshots of the user experience, along with a behind-the-scenes view of the Marketing Cloud Journey that makes it all happen.
    - **OPTIONAL ACTION ITEM DUE MARCH 10:** eComm specialists have the opportunity to customize the 'eComm Support' footer of the emails for users you support (twice a year). Find complete details in the 'eComm Support Footer Customization' section of the wiki, along with the timeline for this first round of edits/customization to be launched in April.

Roadmap Updates

DATA

- **IER Storage and Big Objects**: Jen Mortensen is compiling a series of options related to IER storage for consideration. We will have documentation ready for group review soon.

- **POI Integration**: Daniella Torres continues working with the UIS integration team to capture POI data in Salesforce. *Prior to new data being available in production, we will provide clarity on the impacts to existing reports, how to modify them based on your needs, and more.*
- **User Fee**: Jen Mortensen shared an updated eComm user fee with the team via email on February 17.

MAINTENANCE

- **Contacts without Email Addresses**: Jen Mortensen compiled documentation related to excluding contacts without email addresses [7] from the eComm integration.
    - **ACTION ITEM DUE MARCH 15**: Please review the documentation and let us know if you have any questions or concerns by March 15.
- **Business Unit and Preference Management**: The team has met with all campuses (excluding CU Denver due to the eComm specialist vacancy), and campus teams are working to modify their tab of the business unit and preference spreadsheet [8]. We're postponing any work for CU Boulder given the number of users and business units planned for migration back to CRM01. More information on next steps and detailed actions will be available soon.
- **Advance GeoCode Sunsetting [9]:** As mentioned in the quarterly eComm specialist meeting, eComm needs to sunset the use of the Advance GeoCode. Geocodes provide a shortcode for a geographic area defined by the GeoCode Description (such as: DEN-S | Denver South - Castle Rock, Bailey, Parker CO) and can be found on a Contact record in Salesforce (Address Information section).
    - All 280 Salesforce Reports that leverage the GeoCode field will need to be updated to some degree to ensure that when the field is deleted from Salesforce, there is no unintended impact on existing Reports. Failure to do so could result in an audience becoming broader and receiving an irrelevant communication.
        - **CU Boulder Advancement |** 185
        - **CU System |** 54
        - **CU Anschutz, CU Boulder Strategic Relations, CU Denver, UCCS |** Between 5-11
        - **CU System Advancement |** 0
    - Given that the majority of Reports fall under CU Boulder Advancement, Melanie Jones met with them mid-Feb. and is still identifying a feasible timeline. Melanie sent an invite for **March 7, 2:30 - 3 PM** to meet with all others (recording will be provided if unavailable).

NEW FUNCTIONALITY

- **Distributed Marketing**: Distributed Marketing has been deployed in our stage environment with five licenses to continue exploring the solution. Following a decision on an associated business unit and preference model, we will schedule a demo with the team and begin discussing a rollout plan.

    - **Note**: the rollout of Distributed Marketing will be preceded by the business unit and email preference modifications mentioned above. We want to set the stage for an improved constituent experience with the Distributed Marketing rollout as opposed to carrying previous challenges forward into a new enhancement.
- **Event Management**: Soon, the System team will begin discussing options for improvements and streamlining within our Cvent implementation. This work may include creation of new, simplified templates that allow for rapid event creation (particularly for simple events) and cleanup of old assets and content. We'll be in touch with more information soon.

Ongoing Opportunities

- Request the following items by submitting a help ticket [10] and selecting "Marketing Cloud >> select topic below >> follow instructions".
    - **Einstein** **[11]**
    - **Journey Builder** **[12]**
    - **Dynamic Content** **[13]**

New/Updated Resources

- Cvent Paid Events [14] (no special characters in paid events, even grammatically correct ones)
    - Special Characters in Cvent Event Titles & Payment Processing Issues [4]
- New User Onboarding [6] (with recent session recording)
- Manage Campaigns [5]
- Limitations of Using Anchor Links in Emails [15]
- Geocode Sunsetting (2023) [9]
    - Free Map Tool [16]
- Help Ticket (Marketing Cloud >> Login Issue)
    - We have had numerous tickets submitted regarding Marketing Cloud appearing to be 'broken' stemming from Cookies not being enabled in the user's browser.

Ongoing Data Monitoring

- Data Issues Dashboard [17]

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