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eComm Specialist Digest | May 1, 2023 [1]



May 1, 2023 by jennifer.mortensen [2]

General Updates

- **eComm User Fee**: We are currently negotiating with Salesforce to finalize the previous eComm user fee estimates for FY24. Based on initial conversations, the previous estimates provided will likely experience an increase. We'll provide more information as soon as possible so you can finalize your budgets for the next FY.
- **CU Ascend Launching End of May**: Prior to the launch, both Advance and Ascend will be read-only. The target dates for this freeze period are Friday, May 12 - Tuesday, May 30.
    - **Implication**: Any changes to Advance/Ascend data will NOT update in eComm during the freeze period. This includes new deceased and do not contact values, as well as email opt out changes that are received outside of eComm.
        - Additionally, any contact updates received via eComm during the freeze period will not be updated in the Advance / Ascend source system until the launch is complete.
- **Melanie Jones is away through May 4**
    - Submit an eComm Help Ticket [3] as needed
- **Continued User Adoption, Manage Salesforce Campaigns [4]** | 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.
    - **Numerous Contacts have been created incorrectly by users**, resulting in them not being pulled into any Reports. **Users must follow the instructions in the wiki and should never 'Create New Contact' directly in Salesforce**. Please reach out to the list of individuals you received via email ASAP to correct this ongoing behavior.
- **Reminder: Adding New Contacts to Salesforce** | We have noticed a number of Standard Contacts being created with a university email address. You should only add contacts to Salesforce [5] if you are confident that they do NOT already exist in Salesforce. While the process for matching against existing contacts should achieve this, here are some basic rules to follow:
    - **Never** upload a contact with a university email address (@colorado, @uccs, @ucdenver, @cu.edu, etc.)
    - **Never** upload a contact with an existing affiliation (donor, student, employee,

alumni, etc.)
    - If you think you have an exception to these rules but are unsure, please submit an eComm Help Ticket [3].

Roadmap Updates

PROJECTS

- **Business Unit & Email Preference Optimization**: Thank you to all the eComm specialists for finalizing your Business Unit & Email Preference changes. Claire & Daniella have committed the majority of their time to completing these projects.
    - Marketing Cloud Users and eComm specialists (except those at Boulder) received a message on 4/4 [6] informing them of these changes they might see in preparation for this optimization project to take effect before June 1.
    - eComm specialists will have action items to complete by 5/31. More information to come.

DATA

- **Person of Interest (POI) Integration** [7]: POI data is available in Salesforce to Admins only. Prior to new data being available to all, we will provide clarity on the impacts to existing reports, how to modify them based on your needs, and more.
    - Thanks to those who attended our optional March 29 session for an overview of what's to come and an Employment Reporting tip to lessen the burden, in preparation for this change (recording in wiki).
    - On April 5, we identified that some Data Extensions based on Employment data and updated via Automation Studio could include POI data. This is because automations run under an 'Admin' user rather than the person who configured it.
        - **Existing Automations**: We have identified 33 (of 151) Business Units with Automations configured, will audit which Automations are impacted, and update corresponding Reports to not include POI data.
        - **New Automations**: If Using Employment Data, Add a Filter for: Employment: Record Type = Official CU Employment

MAINTENANCE

- **Individual Email Results (IER) Management** [8]: If you have not already done so, read the full document to understand the implications and associated cost savings. This change will be rolled out before the end of the Fiscal Year.
- **Contacts without Email Addresses** [9]: If you have not already done so, read the full document to understand the implications and associated cost savings. This change will be rolled out before the end of the Fiscal Year.
- **Advance GeoCode Sunsetting** [10]: eComm is sunsetting the use of the Advance GeoCode by June 1 due to the field being removed from its source system, Advance/Ascend.
    - All 280 Salesforce Reports that leverage the GeoCode field will need to be updated to ensure that when the field is deleted, an audience doesn't become broader, resulting in many receiving an irrelevant communication.
    - *Majority of eComm Specialists migrated away from using GeoCode in any

Reports as of April 25.
    - *Boulder Advancement will sunset GeoCode by **May 25**.

Ongoing Opportunities

- Request the following items by submitting a help ticket [3] and selecting "Marketing Cloud >> select topic below >> follow instructions".
    - Einstein [11]
    - Journey Builder [12]
    - Dynamic Content [13]

New/Updated Resources

- Emails: Unable to Send, Failed Send. Data Extension: Error or Equal to 0 [14] (updated)
    - We reformatted our most used troubleshooting resource to highlight the fastest way to identify the most common issues.
- Cvent Approval Checklist [15] (two additional paths for Express Events, paid or free)
- HTML Pasted Emails [16] (new)
    - We have found numerous cases of HTML being pasted incorrectly, resulting in eComm's Commercial Footer not being included in emails (violating CAN-SPAM).
- Geocode Sunsetting (2023) [10]
    - Free Map Tool [17] (update)
        - Two versions of the tool are available to find zip codes: one based on radius from a central point and the other with a shape drawn on the map.
    - Timelines have been updated to be accurate.

Ongoing Data Monitoring

- Data Issues Dashboard [18]

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