

eComm Upgrade: Cvent Integration Campaign Ownership

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We covered multiple changes to the Cvent-Salesforce integration in our recent blog post [eComm Upgrade: Cvent UAT Completed](#) [3]. Two elements that we did not address in that post are:

- How campaigns will be named in Salesforce
- How campaign ownership will be assigned and how campaigns will be shared

Current Process

Currently, Cvent users must request approval from their eComm Specialist prior to launching their event. Part of this approval process entails the eComm Specialist manually creating a campaign in Salesforce that is associated to the corresponding event in Cvent. Creating this campaign allows us to better track a constituent's engagement with and relationship with CU. After creating the campaign, the eComm Specialist then had to manually share it with the associated user so that the registration data collected could be used as an exclusion for future event-related email sends.

Post-eComm Upgrade Process

Once the eComm Upgrade is complete, Cvent users will still need to obtain approval from their eComm Specialist prior to launching the event, but some of the work that took place manually will now be automated. The Cvent Integration Agent will automatically create a campaign in Salesforce associated with the event in Cvent (as documented in our recent [blog post](#) [3]). Once the campaign is created, the Integration Agent will automatically assign ownership to the Cvent user who created the event (assuming that the Cvent user in question also has a Salesforce license). Once ownership is assigned, the campaign will be automatically shared with the associated user so that it can be used for future email marketing campaigns. This automatic integration will save a significant amount of time for the eComm Specialists and result in faster turn around time on event approvals.

Naming Convention

Additionally, the Cvent Integration Agent will automatically assign a name to the Salesforce campaign based on information from the Cvent event. The naming convention used will be as follows:

Campus Number_EventDate(YYYYMMDD)_Event Name

For example, 04_20190515_Donor Reception.

More information about these changes will be available soon.

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