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eComm Upgrade | Salesforce Changes [1]

March 4, 2019 by Melanie Jones [2]

Experience a modern, streamlined experience in Salesforce Lightning. The robust data you count on in Salesforce will still be available, but how it appears will be slightly different. You'll notice:

- a more modern, streamlined experience
- some helpful tools we'll be rolling out later in 2019

View Salesforce Presentation [3]
Download Salesforce 1-Pager [4]

Login



The good news is, you can simply continue to use the cu.edu/ecomm/login [5] page to log into Salesforce. If you bookmarked the old link, you'll need to replace it with this new link [6].

- Your **username & password are the same** (the same university email and password you use for the employee portal)

If you run into any trouble, contact your Campus IT Help Desk.

Report Name Change



You Inclusion audience Report now automatically only includes individuals subscribed to your preference category. To communicate this change, we changed the report names. You'll now

notice *SUB* text near the end of the Report or name. This indicates what Email Preference Category the audience is subscribed to and the content of communication you are sending. For example:

- 08 UREL OG Degreed Alumni **SUB UCCS Events**
    - **Subscribed to UCCS Event Emails**
- 08 UREL OG Degreed Alumni **SUB UCB Alumni**
    - **Subscribed to CU Boulder Alumni Association Emails**

Commercial Naming Convention [7]
Transactional Naming Convention [8]

Event Campaign Name Change & Additional Event Details



Use Salesforce to further target your invitations based on overall event details and individuals' participation, including:

- event dates and capacity
- fees and accounting information
- all event registrants (including guests, if captured)
- individual participation status (if collected)

UPDATE

Past events will be updated in Salesforce with a new campaign name and additional event details.

Related Wiki Posts

- Marketing Cloud, eComm Upgrade | Changes [9]
- Cvent, eComm Upgrade | Changes [10]
- Salesforce Lightning | Reporting [11]

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