MEC Weekly Digest | January 20, 2020 [1]

January 21, 2020 by jennifer.mortensen [2]

Duplicate Resolution Update

- **Update**: Lisa Carr and Lynn Cornier at the COE have been working with teams from UIS and Advancement to identify and begin resolution on more than 40,000 duplicate contacts. These duplicates were identified as contacts that had multiple records for a single campus name and email but separate records containing Advance ID, student ID, or employment ID.
- **Progress**: To date, the team has merged 29,471 contacts. The survivor record is the record that was generated from HRMS and/or Campus Solutions. An additional 11,596 are continuing to be actively investigated and verified prior to a merge.
- **Other Duplicates**: Duplicates that are not Advancement-related will be addressed once this project is complete. MECs can continue to add duplicates to the DCR spreadsheet for processing if they believe the duplicate will not be caught based on the criteria of the project above. Please send questions or concerns to Jennifer [3] or Daniella [4].

Salesforce and Marketing Cloud Connector

- **Update**: SFMC believes that the discrepancies we are seeing between Salesforce and Marketing Cloud (see January 13 weekly digest [5]) are due to issues with connector. A fix has been identified, and the COE hopes to implement and test next week. We will provide more information as soon as it becomes available.

Campaign Report Upload for MC

- **Issue**: MECs use the Campaign Report Upload for MC [6] functionality on a regular basis but sometimes forget to update the associated report criteria for their own campus/department.
- **Impact**: Reports are created that contain incorrect filters and email preferences.
- **Solution**: Daniella updated the report description to help remind us of what we need to edit: "Please replace CU President News and SYS Email with your Campus/Department. Replace Meets eComm Contact Criteria with Deceased for transactional reports. **Do not delete** This report is used on the campaign record to run a campaign member report."

Transactional Email Logic

- **Issue**: The System team has noticed that some transactional reports are being built incorrectly and are therefore not actually transactional.
- **Solution**: When building a transactional report, please structure your report logic as follows:
    - REMOVE Meets eComm Contact Criteria
    - ADD Deceased = False
    - Ensure that no email preference categories are selected

Salesforce Field "Email Present?"

- **Issue**: The System team has noticed that some MECs are using the Email Present? field to try and limit the number of records that appear in reports. While the Email Present? field is included in <u>Salesforce report templates</u> [7], it is designed to be used as a placeholder only (see training materials for <u>commercial</u> [8] and <u>transactional</u> [9] reports).
- **Solution**: MECs should replace the Email Present? field with the associated email field for their communication.

Email Preference Requests for Q1 of CY20

- **Update**: Thanks to all of you who submitted your email preference requests to the COE for consideration in Q1 of CY 2020. Nalini has reported that requests have been approved. We don't have a firm deadline for completion of the work, but it's safe to expect sometime in March near the end of Q1. If you submitted a preference request, please double check the <u>spreadsheet</u> [10] to ensure that everything is accurate before work begins.

Discover Reporting

- **Update**: Discover Reports in Marketing Cloud are now available for all users. The System team plans to announce this in the January eComm newsletter. For those of you who have not yet reviewed information on Discover Reports, please see the <u>Discover Reports in Marketing Cloud wiki</u> [11].

Ongoing TaskRay Tasks & Data Monitoring

- <u>TaskRay Dashboard</u> [12]
- <u>All TaskRay Tasks</u> [13]
- <u>Data Issues Dashboard</u> [14] for UIS

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[3] mailto:jennifer.mortensen@cu.edu [4] mailto:daniella.torres@cu.edu [5]
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[6]
https://cuecomm.lightning.force.com/lightning/r/Report/00Of4000007gqSREAY/view?queryScope=userFolders

[7] https://www.cu.edu/blog/ecomm-wiki/salesforce-reporting

[8] https://docs.google.com/document/d/15FT1mvXnltMnm1Hn3MRieISW-9uSTLd7Ebgi3UPdTKs/edit

[9] https://docs.google.com/document/d/1aYCwjPRQM-NujQubUjHC9rSntjdD9v7sW7X3rTuTJPY/edit

[10]
https://docs.google.com/spreadsheets/d/1xKzwVIGd1oGLxE9OUMLmsI956y6ePdrKSIzsXyR7D0A/edit?usp=sharing

[11] https://www.cu.edu/blog/ecomm-wiki/discover-reports-marketing-cloud

[12]
https://cuecomm.lightning.force.com/lightning/r/Dashboard/01Zf4000000fOJjEAM/view?queryScope=userFolders

[13] https://cuecomm.lightning.force.com/lightning/n/TASKRAY__TaskRay

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