MEC Weekly Digest | July 12, 2022 [1]

July 12, 2022 by jennifer.mortensen [2]

Team Updates

- **Welcome Lauren Galena**: We are excited to announce that Lauren Galena has accepted a position with the eComm team as a senior analyst. Welcome to the team, Lauren!
- **Daniella Torres Team Transition**: Daniella Torres has formally transitioned to the UIS CRM team as a full-time Salesforce admin.

System Team Notifications

- **Update**: Given recent team changes, please note the following when contacting the System team for support:
  - Daniella will receive any Data Change Requests (including updating an Individual contact's email address) via the built-in DCR workflow in Salesforce.
  - Requests to move users to/from Public Groups will be addressed by Melanie Jones (rather than Daniella Torres).
  - Any other items for Daniella Torres or Claire Hamilton should be sent to Jennifer Mortensen & Melanie Jones to address and escalate as needed.

FY23 Campus Billing

- **Reminder**: Jen Mortensen and Paula Ramirez will be conducting billing for campus eComm services on July 14 using data in the reports below. Campus budget teams will receive an email notification with supporting documentation on July 15.
  - Salesforce & Marketing Cloud Licenses [3]
  - Cvent Licenses [4]

VPN Login Restrictions Removed

- **Update**: Based on a CU System security review, VPN will no longer be required for users to access Salesforce and Marketing Cloud. We recommend, however, that users continue to use VPN as a best practice.

July Last Login Audit

- **Reminder**: Jen Mortensen will be completing the July last login audit this week and sending user notifications on July 18. Jen will post additional information in Chatter for MEC review.

New/Updated Wikis and Resources

- Branded email templates [5] (added CU Anschutz templates)
- Leadership page [6] of eComm website updated to include new eComm team members, CRM team members, and an org chart
- Policies and governance page [7] of eComm website updated to include governance structure (previous SLA with CU Boulder removed)

Outstanding Issues

- **Dashboard Subscriptions**: Salesforce has a known issue where subscribed Dashboards may not send out emails as scheduled or may skip some schedules [8]. A release in in progress for this summer.
- **Cvent-Salesforce Integration**: A case is open to troubleshoot discrepancies between Cvent events and associated campaigns in Salesforce. Please send any recent examples to Melanie Jones to keep the case open.
- **Preferred Name**: Work is underway. We will provide an update soon.
- **Q3 Business Unit and Preference Requests**: the CRM team is working to process business unit and preference requests submitted for Q3. We expect work to be completed next week.

Ongoing Data Monitoring

- Data Issues Dashboard [9]

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