

## **MEC Weekly Digest | July 26, 2022** <sup>[1]</sup>



July 26, 2022 by [jennifer.mortensen](#) <sup>[2]</sup>

### **July MEC Meeting**

- **Reminder:** Our next team meeting will be held this Thursday, July 28 from 2 - 3 p.m. We look forward to seeing you there.

### **August Provisioning**

- **Update:** Please have your provisioning and deprovisioning requests submitted and approved ([via a comment in Chatter](#)) <sup>[3]</sup> by Friday, July 29. Credentials will be available to new users on Wednesday, August 3.

### **Annual SkillSoft Audit**

- **Reminder:** After receiving four reminders and one deadline extension since July 7, 26 users have not completed their expired SkillSoft courses; these users will be deprovisioned in August.
- **Action:** Please reach out to your users and reiterate the importance of completing this task to retain access. If you have any insight on your users (such as out of the office, license no longer needed, etc.) please add notes to Column B of the spreadsheet. Users who fail to meet the access requirements will receive a notice that their access is revoked on July 28.

### **Cvent Failed Refunds**

- **Issue:** Many of you have reported increases in the rate of failure associated with Cvent refunds.
- **Refund Processing:** We are currently investigating the issue with both CU Treasury and Cvent and have identified 14 events in 2022 that contain 26 failed refunds. Please contact Jen Mortensen if you would like to view the refund failure spreadsheet.
- **Technical Error:** While investigating, we also noticed that users may receive a message that the refund is being processed when in fact the refund transaction has failed OR that users may receive simultaneous success and failure messages. Jen Mortensen sent an alert to Cvent users today encouraging them to verify the success or failure of refunds by navigating to the "Orders & Payments" tab. Cvent is troubleshooting

this issue.

- **Next Steps:** We will alert you as soon as we have more information on a solution.

## Preferred Name

- **Update:** Work is underway to leverage preferred name for each constituent population (alumni/donors, employees, and students) in Salesforce & Marketing Cloud. You might start to notice these fields in Salesforce reporting, but they are not yet ready to be used.
- **Next Steps:** Continue to use the existing first name personalization for student populations. We will discuss next steps at this Thursday's team meeting.

## New/Updated Wikis and Resources

- [Create Salesforce Campaign and Add Campaign Members](#) [4] (added link to [Manage Campaign Members](#) [5] individually, for MECs & users)
- [Salesforce Reporting](#) [6] (updated 'Engagement' tab with Report templates, such as 'who didn't open an email')

## Outstanding Issues

- **Billing:** Initial billing for FY23 is complete. The next true-up cycle will occur in September.
- **Cvent-Salesforce Integration:** Given no additional examples of issues with the Cvent-Salesforce integration, the case has been closed. If you identify discrepancies in the future, let us know and we will reopen a case.
- **Q3 Business Unit and Preference Requests:** Work on Q3 business units and preferences is complete. Thanks to Claire Hamilton and Daniella Torres for their work on making these changes.
- **Subscriber Reactivation:** Claire Hamilton has developed a process to automate subscriber reactivation in Marketing Cloud for subscribers who are actively enrolled or actively employed. Claire and Jen will be conducting remaining testing this week.

## Ongoing Data Monitoring

- [Data Issues Dashboard](#) [7]

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