MEC Weekly Digest | March 9, 2020 [1]

March 10, 2020 by jennifer.mortensen [2]

Good News to Celebrate

- **New Page Layout for Contacts**: New compact layouts (the header under a contact's name) have been created for both Individual and Standard contacts. Please let Daniella know if you have any suggestions.
- **Pharmacy Automation Studio Pilot as Alternative to Journeys**: Jen Mortensen worked with Justin Rowe and Jaron Bryant in the School of Pharmacy to successfully pilot an Automation Studio "journey" that will serve as a temporary substitute until we are able to fully use Journey Builder. Thanks for your partnership on this pilot, Justin and Jaron! Contact Jennifer Mortensen [3] if you'd like to learn more about how Automation Studio might serve as a stop gap for Journey Builder needs.
- **Email Style Guide**: UCCS recently launched a beautiful email style guide that will be housed on their brand website. Get inspired by viewing a sneak peek of the style guide [4]. Great work, Eric and Kayla!

IERs and Storage

- **Issue**: The COE has informed us that IERs are taking up 60% of our storage in 03 (there are 36,201,312 records), thus bringing our total 03 storage space to 99%.
- **History**: In 01, we were storing IERs in Salesforce for 90 days (the industry standard) in order to free-up storage space.
- **Solution**: We will adopt the 90-day approach in 03. We can provide additional training on Marketing Cloud reporting and getting the data that you need for time periods beyond 90 days if desired.

Cvent Event Cancellations and Coronavirus

- **Issue**: Some event planners are considering cancelling events due to the spread of coronavirus.
- **Impact**: We need to follow specific guidelines from CU Treasury when cancelling paid events and issuing refunds.
- **Solution**: Jen Mortensen posted *What if I need to cancel my Cvent event due to coronavirus?* [5] in the eComm wiki. An email with the same information will be sent to all Cvent users as well.

Cvent Speedtype and Account Code Errors

- **Issue**: We've received word from the Treasurer's Office that ongoing incorrect speedtype and account code combinations are occurring in Cvent.
- **Impact**: The incorrect information is causing substantial additional work for the Treasurer's Office and is also delaying posting of revenue for all campuses. Given the number of errors taking place, the existing process of correcting the errors before posting revenue is not sustainable.
- **Solution**: Beginning with February revenue posting, the Treasurer's Office will deposit revenue for events with combination errors into account code 325100. Departments can then move the revenue to the account code desired with the help of their area accountants.
- **Communication**: Jennifer Mortensen has built a communication about this issue. We plan to send to Cvent users during the week of March 9.

Apsona Error Messages

- **Issue**: Many of you have alerted us to error messages you've been receiving in Apsona during the past few weeks.
- **Impact**: Errors have been causing multiple, sporadic issues, including the inability to successfully add contacts to campaigns.
- **Solution**: The COE is continuing to investigate and believes that the issue is related to an app in Salesforce. The app was turned off as of around 11 a.m. this morning, March 9. Please let Jennifer Mortensen [3] know if you continue to experience issues.

New Matriculation Field for CU Boulder

- **Issue**: CU Boulder has been conducting ongoing exclusions of students who are enrolled but who have not yet matriculated prior to the start of each semester. Since there wasn't a field associated with pre-term students in Salesforce, they were manually updating hundreds of reports each semester to ensure that the appropriate audiences were being excluded from communications.
- **Solution**: The COE built a new CU Boulder matriculation field in Salesforce that is visible to admins only; Daniella will be managing this field going forward. If you are interested in obtaining a similar field for your campus, contact Jennifer Mortensen [3].

Ongoing TaskRay Tasks & Data Monitoring

- TaskRay Dashboard [6]
- All TaskRay Tasks [7]
- Data Issues Dashboard [8]

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[1] https://www.cu.edu/blog/ecomm-wiki/mec-weekly-digest-march-9-2020

[2] https://www.cu.edu/blog/ecomm-wiki/author/13789

[3] mailto:jennifer.mortensen@cu.edu

[4]
https://cuecomm.my.salesforce.com/sfc/p/f40000038uQS/a/f4000000Q9GF/SB6BIbudtMKTaQFKvY2zgQUDIQKJMI

[5] https://www.cu.edu/blog/ecomm-wiki/what-if-i-need-cancel-my-cvent-event-due-coronavirus

[6]
http://cuecomm.lightning.force.com/lightning/r/Dashboard/01Zf4000000fOJjEAM/view?queryScope=userFolders

[7] http://cuecomm.lightning.force.com/lightning/n/TASKRAY__TaskRay

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