

MEC Weekly Digest | Sept. 6, 2022 ^[1]



September 6, 2022 by [jennifer.mortensen](#) ^[2]

Preferred Name Update

- **Reminder:** Preferred name rollout will occur next Monday, Sept. 12. We've sent two communications to users and will be making final changes to profile attribute names next Monday morning. Three wikis are available to assist with this process:
 - [Understanding Preferred Name at CU](#) ^[3]
 - [Preferred Name Rollout for eComm Specialists](#) ^[4]
 - [Personalizing your Email with Preferred Name or other Profile Attributes](#) ^[5]

Email Preferences and Business Units

- **Q4 Business Unit and Email Preference Requests:** We are now accepting business unit and email requests for Q4. Please submit your requests on the Q4 tabs of the CY22 spreadsheet no later than Sept. 16.
- **Email Preferences Audit:** Lauren Galena has completed an audit of all business units and email preferences in relation to the subscription center; she identified numerous issues. Please [contact Lauren](#) ^[6] if you'd like to view the data associated with your campus.
- **Email Preferences Corrections:** Given the volume of issues that need to be corrected, the CRM team will begin planning to roll that work into upcoming sprints. The time needed to correct issues will be substantial, so we do not have an expected completion date at this time.

Cvent Payment Processing and Integration

- **Cvent Integration:** We're awaiting confirmation from Cvent regarding the retroactive push of event data from December 2021 - present.
- **Cvent Payment Processing:** We're continuing to work with Cvent, Authorize.net, and Wells Fargo to resolve recent payment processing issues. Posting of August revenue has been delayed as a result. A complete update on this issue is available in the MEC Chatter group.

Automation of Data Extensions

- **Update:** Earlier this spring, we implemented a spreadsheet where MECs could request automation of data extensions with the goal of addressing failed imports. We'd now like to begin exploring a process to automate ALL data extensions (with some exceptions based on specific use cases). This project will ultimately eliminate the need for data extension imports but WILL require review of existing data extensions and MEC training on automation of new data extensions when they are created.
- **Action:** If your campus would like to pilot this process, please contact Jen Mortensen ^[7] to discuss next steps. We expect to roll this out on one campus first with others following.

Journey Builder Pilots

- **Update:** We currently have Journey Builder pilots underway with alumni teams at CU Denver and UCCS, as well as in System Advancement. While we're continuing to learn about what's possible as we determine a path toward a full-scale rollout, we're ready to begin accepting additional Journey Builder requests from you and/or your super users.
- **Action:** If you or your users have requests/inquiries about Journey Builder and would like to discuss opportunities, please submit a help ticket and select Journey Builder Pilot from the Marketing Cloud drop down menu ^[8]. Please note that requests will be addressed in the order in which they are received.

Einstein Pilot

- **Update:** Based on the Journey Builder pilots underway with alumni teams at CU Denver and UCCS, we've launched Einstein in their corresponding business units as part of our initial assessment. While we initially understood that Einstein would need 90 days of data after being enabled, we discovered that it can actually pull data from the previous 90 day send period rather than waiting for an additional 90 days to elapse.
- **Next Steps:** Lauren Galena and Claire Hamilton are working together to understand how we can best use Einstein functionality and how it compares to existing resources, such as custom Salesforce dashboards and Datorama. More information will be available soon. If you'd like to explore Einstein in one of your business units, please contact Jen Mortensen ^[7].

Housekeeping

- **???New Provisioning Flow Quiz:** If you haven't already done so, please complete the new provisioning flow quiz ^[9] to ensure familiarity with the new process ^[10].
- **New User Credentials:** New users can expect to receive their credentials today, Sept. 6.
- **September Login Audit:** Jen Mortensen will begin the September login audit this week and will notify MECs via Chatter when the tracking spreadsheet is ready for review.

Other Completed and Pending Work

- **COMPLETE**
 - New provisioning flow launched
 - New user onboarding journey launched with dynamic content
 - Contact object and license object are now synchronized in Marketing Cloud.
- **IN PROGRESS**
 - **Additional Synchronization:** Claire Hamilton will be working to assess and

synchronize additional objects with Marketing Cloud, such as the education object, and possibly others depending on use cases.

- **Bounced Email Address Management:** Jen Mortensen is reviewing work related to bounce management.
- **Distributed Marketing:** The CRM team is working on CPI development for handling multiple email addresses.
- **Dynamic Content:** Now that we have synched some Salesforce objects with Marketing Cloud, we will have additional opportunities to use Dynamic Content. Melanie Jones has been piloting dynamic content both manually (with the recent Skillsoft audit) and automatically (with the synchronization of the license object and creation of the associated new user onboarding journey). If you are interested in piloting opportunities on your campus, please [contact Melanie Jones](#) [11].
- **Event Management Requirements Review:** Jen Mortensen is working to assemble a requirements document for an event management tool. This document will be ready for team review by the end of the week.
- **Page Layout Cleanup:** Daniella Torres is working to clean up the page layout for our Salesforce objects. You should start to see improvements regarding both field location and removal of fields that we do no use/need. We'll keep you informed of any major changes.
- **POI Data:** Daniella Torres is working with the integrations team regarding assessment and next steps for integration of POI data.

Ongoing Data Monitoring

- [Data Issues Dashboard](#) [12]

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[attributes](mailto:lauren.galena@cu.edu) [6] <mailto:lauren.galena@cu.edu> [7] <mailto:jennifer.mortensen@cu.edu>

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[10] <https://www.cu.edu/blog/ecommerce/wiki/monthly-license-change-requests> [11]

<mailto:melanie.jones@cu.edu>

[12]

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