

MEC Weekly Digest | September 13, 2019 ^[1]



September 13, 2019 by [jennifer.mortensen](#) ^[2]

Duplicate Management Update

- **Issue:** COE estimates show that there are over 50,000 known duplicate contacts in CRM03.
- **Impact:** It is difficult for eComm Specialists to appropriately manage contacts and for contacts to manage their email preferences given the number of duplicates present.
 - [Duplicates in CRM03](#) ^[3]
- **Solution:** The COE is working with UIS on a duplicate management solution that will run on an ongoing basis. Testing will likely begin next week, and the System team will participate in the testing process. The goal is that batch jobs will run regularly to control duplicates and that a manual duplicate merge process will not be needed except in exceptional cases.
- **Work-Around:** In order to ensure that eComm is CAN-SPAM compliant, Jen Mortensen is manually checking email opts out on a weekly basis to ensure that contacts opting out of all emails are truly opted out in each of the duplicate contact records. If eComm Specialists notice duplicate contacts, they can continue adding them to the DCR spreadsheet (see Chatter for link).

MC01 to MC03 Email Preferences Update

- **Issue:** During the migration from MC01 to MC03, unit-specific email preferences were not migrated. Neither the COE nor eComm knew that there was an option to transfer these preferences from one MC org to another.
- **Impact:** In order to remain CAN-SPAM compliant, contacts with granular email preferences were opted out of all emails. This action has caused numerous issues for eComm and its constituents.
- **Solution:** The COE has identified roughly 35,000 records that were affected by the email opt out action. Estimates are that it will take between two and four weeks to map the MC01 preferences to MC03 since the process will be done manually. The COE will be meeting with the System eComm team next week to develop an action plan and timeline for this project.
 - [Migration of Unit-Specific Email Preferences from MC01 to MC03](#) [4]
- **Work-Around:** If you notice any contacts who are affected by this issue, please create a TaskRay with the appropriate details.

Data Management Update

- **Issue:** As all eComm specialists already know, we continue to encounter a number of data issues in CRM03.
- **Impact:** These data issues affect our ability to effectively communicate with our constituents for both commercial and transactional communications.
- **Solution:** The System team is meeting regularly with UIS to address these data issues, and the COE is involved as well. We have created several open tickets in TaskRay that eComm Specialists can view to increase their knowledge and awareness of where work is occurring. Links to these data issues and tasks are below.
 - [Active Employees or Students missing Primary Emails](#) [5]
 - [Employees missing Supervisors](#) [6]
 - [Contacts with Advance Constituent Type or Advance ID missing Affiliations](#) [7]
 - [Active Employees missing Campus Emails](#) [8]
 - [Active Students missing Campus Emails](#) [9]
 - [Advance - Salesforce Integration Issue](#) [10]
 - [Employees with Employee IDs longer than 6 digits](#) [11]
 - [Alumni and Students missing Education/Enrollment Records](#) [12]
 - [UCB employees with no UCB UUID](#) [13]
- **Work-Around:** If you identify a data issue that falls into one of the above categories, please make a note of it but be aware that these issues will be addressed as a whole and not on a one-off basis. If you identify or suspect a data issue that has not already been documented, please create a TaskRay.

Intermediate Training Available for Users

- **Overview:** Mel & Jason have been collaborating on an Intermediate Salesforce and Marketing Cloud training to roll out to users. Demand was high with 70% of Jason's users registering for the event.
- **Training Session Details**
 - **Salesforce | 45 min:** Users will better understand eComm's process for creating audiences in Salesforce, gain awareness of how audiences are identified in Salesforce (Reports vs. Campaigns), and understand how to target different email addresses (Reports vs. Data Extensions).

- **Marketing Cloud | 60 min:** We'll walk through a detailed check list to make sure users' emails meet best practices, including image size, mobile, accessibility, A/B testing, and targeting.
- **Next Steps:** If you would like to have these training sessions hosted at your campus, please coordinate with melanie.jones@cu.edu [14].

Open System Tasks in TaskRay

- **Issue:** There are many open projects on which the System eComm team is working but of which the eComm Specialists are not aware.
- **Solution:** To increase transparency, we are providing links to open issues in TaskRay below (in addition to those for the data issues above). When we receive updates on these issues, we will post the in TaskRay Chatter so eComm Specialists can see ongoing updates.
 - [Email Opt Out Files - September 13](#) [15]
 - [Missing Data in MC Export](#) [16]
 - [Email Preference Issues in Salesforce](#) [17]
 - [Marketing Cloud Sender Profile Change from MC01 to MC03](#) [18]
 - [Ongoing Subscriber Issue in Marketing Cloud](#) [19]
 - [New Email Preference Category](#) [20]
 - [New Marketing Cloud Business Unit](#) [21]
 - [New Business Unit and Email Preference Request](#) [22]
 - [Opting Contacts Back in to Receive Email](#) [23]
 - [Add MC Subscriber Status to Salesforce Contact Object](#) [24]
 - [Pharmacy contact records issue](#) [25]
 - [Email Opt Out Issues Between Salesforce & Advance](#) [26]
 - [Business Unit Modifications](#) [27]
 - [Save Button in Salesforce Reports](#) [28]
 - [Campus Level Email Opt Out Field](#) [29]

[TaskRay](#) [30], [task ray](#) [31], [dcrs](#) [32], [duplicates](#) [33], [MC01](#) [34], [MC03](#) [35], [email preferences](#) [36], [preferences](#) [37], [migration](#) [38], [data](#) [39], [intermediate](#) [40], [Training](#) [41]

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Links

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[2] <https://www.cu.edu/blog/ecommerce-wiki/author/13789>

[3] https://cuecomm.lightning.force.com/lightning/r/TASKRAY__Project_Task__c/a31f400000083pYAAQ/view

[4] https://cuecomm.lightning.force.com/lightning/r/TASKRAY__Project_Task__c/a31f400000083psAAA/view

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[10]
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[15]
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[16]
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[35] <https://www.cu.edu/blog/ecomms/wiki/tag/mc03>
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