

## MEC Weekly Digest | September 20, 2019 <sup>[1]</sup>



September 20, 2019 by [jennifer.mortensen](#) <sup>[2]</sup>

### September MEC Meeting

- Thanks to everyone who was able to attend our September MEC meeting. For those unable to join, you can view notes in the meeting minutes (check calendar invite to access meeting agenda and notes). We'll be working on the list of most frequently-used wikis, but a few that we know are often useful for MECs are included below for your reference.
  - [Marketing Cloud | Admin](#) <sup>[3]</sup>
  - [Workflow: Managing the Email Opt Out Field in Salesforce](#) <sup>[4]</sup>
  - [Salesforce | Apsona](#) <sup>[5]</sup>
  - [eComm Upgrade | Marketing Cloud Permissions](#) <sup>[6]</sup>

### Individual vs. Standard Contact Duplicates

- **Issue:** Duplicate management for individual and standard contacts is handled differently, and we want to be sure that the MEC group understands the difference between the processes. Note: this is a general description; more information will be provided soon as the COE continues its work on duplicates with UIS.
  - **Individual contacts:** Individual contacts in Salesforce are those generated by a source System, such as Advance. We've found that many duplicates on individual contacts are likely the result of matching rules in MDM that are allowing the duplicates to pass to Salesforce rather than being recognized as one contact.
    - The COE is working on a fix with UIS that will address duplicates for individual contacts. More information will be available soon.
  - **Standard Contacts:** Standard contacts in Salesforce are those created by MECs OR created through Cvent registrations.
    - Standard contacts are generally addressed through an ongoing nightly merge job, so long as the email address on the standard contact matches one of the email addresses on an existing individual contact.
    - If a standard contact email address does not match any of the email addresses for an individual contact, then MECs should submit a DCR by adding it to the DCR spreadsheet (see Chatter for link).

## New Wiki: Emailing Donors with eComm

- **Issue:** Kate O'Connell from the Advancement Reporting team (and formerly with eComm) reached out to let us know that her team is often fielding requests to obtain email addresses for donors.
- **Impact:** The Advancement Reporting team is having numerous conversations with communicators that demonstrate a lack of knowledge about using eComm tools for these types of communications.
- **Solution:** Caroline Kelly and Melanie Jones put together a [wiki about the process for emailing donors](#) [7] as a resource for eComm and Advancement Reporting.

## Cvent & TouchNet

- **Issue:** There is some confusion about the role of TouchNet in relation to eComm.
- **eComm Impact:** TouchNet is NOT designed to be a Cvent replacement for eComm users and will not integrate with Salesforce. It WILL streamline the credit card process in Cvent so that money collected will appear in speedtypes faster through an automated nightly process rather than requiring the Treasurer's Office to manually process transactions. We are working with the Treasurer's Office (at their request) on implementing TouchNet in the eComm environment.
- **Timeline:** We will be rolling out the TouchNet integration with Cvent AFTER the CU Marketplace TouchNet rollout is complete. We do not have a target date yet, since we are still having conversations with both Cvent and TouchNet about the integration process, impact to Cvent users, and in particular the impacts of merchant account changes associated with the TouchNet product and how that will affect active events. We've had two calls so far, but TouchNet and Cvent have a lot to work out on their end, so we don't have any updates at this time but will keep you in the loop as things continue to develop.

## Ongoing TaskRay Tasks

- MECs can view [ongoing progress on TaskRay tasks](#) [8] in Salesforce.
- The System team is working on a TaskRay dashboard that will better demonstrate ongoing progress. More information will be available soon.

[TaskRay](#) [9], [task ray](#) [10], [Cvent](#) [11], [touchnet](#) [12], [touch net](#) [13], [donors](#) [14], [advancement](#) [15], [duplicates](#) [16], [individual contacts](#) [17], [standard contacts](#) [18]

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

[3] <https://www.cu.edu/blog/ecomm-wiki/marketing-cloud-admin>

[4] <https://www.cu.edu/blog/ecomm-wiki/workflow-managing-email-opt-out-field-salesforce>

[5] <https://www.cu.edu/blog/ecomm-wiki/salesforce-apsona>

[6] <https://www.cu.edu/blog/ecomm-wiki/ecomm-upgrade-marketing-cloud-permissions>

- [7] <https://www.cu.edu/blog/ecommm-wiki/emailing-donors-ecommm>
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- [9] <https://www.cu.edu/blog/ecommm-wiki/tag/taskray>
- [10] <https://www.cu.edu/blog/ecommm-wiki/tag/task-ray>
- [11] <https://www.cu.edu/blog/ecommm-wiki/tag/cvent>
- [12] <https://www.cu.edu/blog/ecommm-wiki/tag/touchnet>
- [13] <https://www.cu.edu/blog/ecommm-wiki/tag/touch-net>
- [14] <https://www.cu.edu/blog/ecommm-wiki/tag/donors>
- [15] <https://www.cu.edu/blog/ecommm-wiki/tag/advancement>
- [16] <https://www.cu.edu/blog/ecommm-wiki/tag/duplicates>
- [17] <https://www.cu.edu/blog/ecommm-wiki/tag/individual-contacts>
- [18] <https://www.cu.edu/blog/ecommm-wiki/tag/standard-contacts>