Need eComm Help? Start Here. [1]

November 4, 2019 by jennifer.mortensen [2]

Click on the name of the tab below that matches the eComm category with which you require assistance:

- Salesforce
- Marketing Cloud
- Cvent
- eComm Specialists / Super Users

Now, click the + symbol next to the category that best describes your question to view available resources.

Note that items followed by a * can only be completed with the help of your eComm Specialist [3].

Training

- What is Salesforce? Where can I get an overview? [4]
- What Salesforce new user training is offered? [5]
- 2023 Preference and Business Unit Optimization [7]

Campaigns

- What is the difference between a campaign and a report? [8]
- What is the relationship between campaigns, reports, and data extensions? [9]
- How are campaigns connected to reports? [8]
- Why do campaigns have such complicated names? [10]
- How do I modify or delete a campaign? [12]
- How do I add an individual contact to a Salesforce campaign? [11]
- How do I add contacts to a Salesforce campaign in bulk? [13]*
- Why can’t I see a certain campaign? [14]
- How do I share a campaign with another user? [14]*
- How do I share a campaign with a public group? [14]*

Chatter

- Why am I not seeing all of my Chatter posts? [15]

Contacts

- How do I view a contact? [16]
- What is the difference between a Standard Contact and an Individual Contact? [17]
- How do I modify information on a contact (such as the email address)? [18]
- Why are there duplicate contact records? [19]
- How to I merge two or more contacts? [19]*
- How do I add a contact to a Salesforce campaign? [11]
- What are individual email results (IERs) and how can I use them? [20]
- How do I add contacts to Salesforce? [21]*
- How can I match new contacts against existing contacts to avoid creating duplicates? [19]*
- How will I know if a contact received my email? [20]
- How does a Salesforce contact relate to a Marketing Cloud Subscriber? [22]
- Is Salesforce GDPR compliant? [23]
- Understanding FERPA Flags [24]

Data

- What is eComm's data model? [25]
- What contacts exist in Salesforce? [25]
- Does Salesforce integrate with other CU data sources? [25]
- Is there an Entity Relationship Diagram(ERD)? [26]
- Is there a data dictionary? [27]
- Understanding FERPA Flags [24]
- Understanding Preferred Name [28]
- GeoCode Sunetting in 2023 [29]

Dashboards

- How would I view my Business Unit's email send data via a dashboard? [30]
- I want a dashboard for my email sends like the one on the Salesforce homepage. How do I create one? [31]*
- How do I refresh a dashboard to be sure the data is current? [30]
- How do I subscribe to a Salesforce dashboard? [30]
- Why can't I see a Salesforce dashboard? [14]
Email Preferences

- How do constituents manage their own email preferences? [32]
- How do I opt a contact out of all emails or specific email preferences? [33]*
- How do I opt a contact back in to all emails or specific email preferences? [33]*
- How do I change the name of an existing email preference? [34]*
- How do I create a new email preference? [34]*
- How do I respect a constituent's email preferences? [35]
- How do eComm specialists respect a constituent's email preferences? [38]*

Email Sends

- How do I view email send data in Salesforce? [37]

Events

- How do I locate my Cvent event in Salesforce? [10]
- How do I view event participation in Salesforce? [38]
- Why is my event campaign name so long in Salesforce? [10]

Folders

- How do I share folders and subfolders? [39]*

Integrations

- How are Marketing Cloud, Cvent and Salesforce integrated with one another? [25]
- How are CU's data sources integrated with Salesforce? [25]
- How does the Cvent-Salesforce integration work? [40]
- How can I find my Cvent event in Salesforce? [40]
- How can I get event guests added to Salesforce? [41]
- How can I track event attendees to get the most out of the Cvent-Salesforce integration? [42]
- GeoCode Sunetting in 2023 [29]

List Views

- What is a list view and how can it help me? [43]
- How do I create new list view or clone an existing one? [43]
- How do I switch between different list views? [43]
- How do I pin a list view? [43]

Logging In
• What is the login URL for Salesforce? [44]
• How do I reset my Salesforce password? [44]
• I am not receiving Marketing Cloud’s identity validation email. What should I do? [45]

Notifications (Chatter)

• How do I post in Chatter? [15]
• How do I set my Chatter notifications? [15]
• Why am I not seeing all of my Chatter posts? [15]

Quarterly Release Notes

• Quarterly Release Notes [6]

Reports

• How do I build Salesforce reports? [46]*
• What is the difference between a campaign and a report? [8]
• What is the relationship between reports, campaigns, and data extensions? [9]
• Why do reports have such complicated names? [10]
• How do I request a new report? [47]
• How do I modify an existing report? [46]*
• What data can I use to build audience reports? [48]
• How do I view a report? [49]
• Reporting on Preferred Name.* [50]
• How do I share a report with another user? [14]*
• How do eComm specialist create Reports with CAN-SPAM compliance? [36]*
• GeoCode Sunsetting in 2023 [29]

Subscriptions

• Is there a way for me to grow my audience? [51]
• Can folks subscribe to receive my communications? [51]

Troubleshooting

• How do I add a photo to my Salesforce profile? [52]
• Why did a specific person not receive my email? [53]
• Why can’t I see a specific campaign, report, or dashboard? [14]
• I think I found a bug in Salesforce. What should I do? [54]
• I requested a change to a contact’s email address and was told the change was complete, but the old value is still showing. What should I do? [18]
• Why is a particular contact missing from my audience report? [55]
• Why can’t I send a Marketing Cloud message? [56]

Unsubscribe
How do unsubscribes work? [57]
How can a constituent unsubscribe or subscribe to communications? [57]
How can a user view a constituents’ email preferences? [57]
How can users avoid violating CAN-SPAM? [35]
How do eComm specialists avoid violating CAN-SPAM? [36]*

Users

- How do I request to become an eComm user? [58]

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [59] so we can assist you.

Watch a short video [60] if you’re curious about how tickets get you the best and quickest response.

Now, click the + symbol next to the category that best describes your question to view available resources.

Note that items followed by a * can only be completed with the help of your eComm Specialist [3].

Training

- What is Marketing Cloud? Where can I get an overview? [4]
- What Marketing Cloud new user training is offered? [61]
- Are there additional training opportunities for more advanced Marketing Cloud users? [62]
- What is CAN-SPAM and how does it pertain to me? [63]
- How can users avoid violating CAN-SPAM? [35]
- 2023 Preference and Business Unit Optimization [7]

Accessibility

- What should I think about in terms of accessibility? [64]
- How can I ensure my email is accessible? [65]

Audience

- How can I email donors? [66]
- How do I select my audience? [67]
- How can I email my audience using their campus email addresses? [68]
- Why are my audience report names so complicated? [10]
• Can I use the recipient’s preferred name when communicating with my audience? [28]
• How do I add a new audience for my communications? [47]*

Automation

• How can I organize my work between Email Studio and Automation Studio? [69]
• How do I schedule a Salesforce Send Email in Automation Studio? [70]
• How do I schedule Data Extension imports in Automation Studio? [71]

Canceling an Email

• How do I cancel a scheduled send? [72]

CAN-SPAM

• What is CAN-SPAM? [73]
• What is the difference between a commercial and transactional email? [74]
• What are easy ways for users to avoid violating CAN-SPAM? [35]

Checklists & Quick Guides

All checklists & quick guides [75].

• Plan
  ○ Marketing Cloud Email Checklist [76]
• Test
  ○ Email Checklist (download) [77]
  ○ Email Checklist (electronic) [78]
• Audience & Sending
  ○ Update Audience Quick Tutorial (re-start Data Extension) [79]
  ○ Send Emails [80]
    ■ Salesforce Send Email Quick Tutorial [81]
    ■ Guided Send Quick Tutorial [82]
• For eComm Specialists
  ○ Creating Data Extensions [83]*

Data Extensions

• What is a data extension? [68]
• What is the relationship between data extensions, reports, and campaigns? [9]
• How do I build a data extension? [68]
• How do I import/refresh a data extension? [68]
• Can I import CSV data into a data extension? [84]*
• How do I delete a data extension? [85]
• Can preferred name be included in a Data Extension for personalization? [50]

Dynamic Content
Can Marketing Cloud emails have dynamic content to be custom to recipients based on pre-determined attributes? Can I avoid sending multiple versions of a similar emails by using Dynamic Content?

Einstein

What is Einstein in Marketing Cloud? Is artificial intelligence (AI) available to increase engagement with my emails? As of Oct. 2022, eComm users can request Einstein to be enabled. Provide the name of the Business Unit(s) you wish to have Einstein into the spreadsheet (along with some other details) and it will be enabled by the following Monday.

Email Content

How can I create an “add to calendar” link in an email? Where can I access CU branded templates? How do I save an email as a template? How do I share an email? How do I create compelling content? How do I use templates I've created to build an email?

Email From Information

What are send classifications, sender profiles, and delivery profiles? How do I change my email from name? How do I change my email from address? What is the CU Footer for All emails?

Folders

How can I stay organized in Marketing Cloud? How can I organize Salesforce Send Emails? How can I organize Data Extensions? How can I organize Tracking?

Images

How should I size my images? Where can I locate great CU photography?

Journey Builder

Can I pre-set a series of emails to deliver to an audience to be more efficient?
Can I create a pre-set series of emails to deliver to an audience, where the next email is based on how the recipient engaged with the previous email? [99]

Login and Password Help

- How do I change my password? [44]
- What is my user name? [100]

Mobile

- How do I design for mobile? [101]
- How do I correct my top image display in mobile? [102]

Personalization

- How can I add personalization (from Salesforce) to my Marketing Cloud email? [28]
- How can I test or preview personalization in my email to ensure I did it correctly? [103]
- How can I add other personalized information (from outside of Salesforce) to my Marketing Cloud email? [104]*
- Preferred Name Rollout for eComm Specialists. [50]*

Reporting

- How do I use Discover Reports in Marketing Cloud? [105]
- How do I use the Audience Engagement Over Time report? [106]
- How do I use the Best Performing Send Day report? [107]
- How do I use the Deliverability - Complaint Rate report? [108]
- How do I use the Device Performance by Email Sends and Email Performance by Device reports? [109]
- How do I use the Recent Email Send Summary report? [110]
- How do I use the Time Between Send and Engagement report? [111]
- How do I Report on preferred name? [50]

Send/Schedule an Email

- How do I send an email? [80] (Guided Send or Salesforce Send Email options)
- Where can I view/cancel my scheduled email? [112]
- What is the relationship between campaigns, reports, and data extensions? [9]
- Why do I need an email footer and what should be in it? [113]
- What is throttling and how do I do it? [114]
- What should I consider when scheduling an email? [115]

Subject Lines and Preheaders

- How do I choose a subject line? [116]
- What is a preheader? [117]
Can I add personalized data to the subject line and preheader? [118]
How do I add an emoji to my subject line or preheader? [119]

Subscriptions

Is there a way for me to grow my audience? [51]
Can folks subscribe to receive my communications? [51]

Subscribers in Marketing Cloud

What is a subscriber? [22]
How can I view a subscriber? [120]
How can I view subscriber status and what do the statuses mean? [120]
How do I reactivate a subscriber? [120]*
How do I convert a subscriber key to a contact ID? [121]

Testing

How do I send a test email? [122]
What should I look for in a successful test? [123]
What is an A/B test and how do I perform one? [124]
How can I test personalization? [103]
Does the data appear in Salesforce? [125]

Templates

Can I view CU and UCCS branded templates? [126]
How can I access CU and UCCS branded templates? [127]
How do I save an email as a template? [128]
How do I use templates I've created to build an email? [94]

Tracking and Reporting

Why is tracking important? [129]
Where can I view tracking information for my email? [130]
How can I export tracking information for my email? [131]*
How can I compare the data of different email sends? [131]
What is Datorama? [132]
What is Einstein? [87]

Troubleshooting

My message ended up in a spam folder. How can I prevent this? [133]
How do I fix a broken link in an email I already sent? [134]
Are there checklists that can help me do my job better? [135]
With what browsers is Marketing Cloud compatible? [136]
• Why didn’t a contact receive my email? [53]
• Why can’t I send emails from Marketing Cloud? [56]
• I can't see the audience list I’m sending to. What should I do? [14]

Unsubscribe

• How do unsubscribes work? [57]
• How can a constituent unsubscribe or subscribe to communications? [57]
• How can a user view a constituents' email preferences? [57]

Users

• How do I add a new user or update a license? [137]*

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [59] so we can assist you.

Watch a short video [60] if you’re curious about how tickets get you the best and quickest response.

Now, click the + symbol next to the category that best describes your question to view available resources.

Note that items followed by a * can only be completed with the help of your eComm Specialist [3]. Additionally, some of the links below require that you are logged into Cvent to access their help and resources.

Training

• What is Cvent? Where can I get an overview? [4]
• What Cvent training is available? [138]
  ▪ Cvent Academy (including certifications) [139]
• How can I contact Cvent Help & Support? [140]
• Does Cvent offer training and support resources? [140]
• Quarterly Cvent Release Notes [141]

Abstract Management

• What is Abstract Management? [142]
• How do I get Abstract Management and other Cvent add-ons? [143]

Accessibility
• How can I plan an accessible event? [144]

Add-Ons (Abstract Mgmt., Attendee Hub, etc)

• What additional Cvent products are available for purchase? [143]

App

• Does Cvent have an app for event attendees? [145]
  ◦ What is CrowdCompass? [145]
  ◦ How far ahead should I plan if I'm going to use CrowdCompass? [145]
  ◦ How much does CrowdCompass cost? [146]
  ◦ Is there a way I can offset CrowdCompass costs? [146]
• Does Cvent have an app for event planners to check attendees in? [42]
  ◦ What is OnArrival? [42]

Approval and Launch

• How do I submit my event for approval? [147]
• Why do I have to submit my event for approval? [147]
• How do I launch my event? [147]

Attendee Hub

• Does Cvent have a product to help support virtual or hybrid events? [148]
• What is Virtual Attendee Hub? [148]
• How do I get Attendee Hub and other Cvent add-ons? [143]

Capacity

• How do I give my event or agenda items a capacity? [149]

Checklists & Quick Guides

All checklists & quick guides. [75]

• Plan
  ◦ Cvent Build Checklist [150]
  ◦ Event Strategy Checklist [151]
• Test
  ◦ Event Checklist (download) [152]
  ◦ Event Checklist (electronic) [153]
• Event Approval & Launch
  ◦ How-To Request Approval & Launch Event [154]
  ◦ Event Approval Checklist (used by event approvers) [155]
What to check before opening registration (from Cvent)

- Fundraising Events
  - Create a fundraising event

Classic Sunset

- When is Cvent Classic sunsetting?
- Are there live, virtual training to help me transition away from Classic?
- Are there training available on-demand to help transition away from Classic?

Contacts

- How do I add a new contact type for my event?

CrowdCompass

- What is CrowdCompass?
- Does Cvent have a mobile app to support events?
- How do I get CrowdCompass and other Cvent add-ons?

Email

Email Communication

- How can I communicate with past attendees?
- How do I send event and session emails?
- How can I ensure an email was sent and delivered?
- If I’m sending an event reminder in Marketing Cloud, how do I exclude people who have already registered?

Email Policies

- How do I send an event invitation through Cvent?
- What event emails are sent through Cvent?
- What is the difference between a commercial and transactional communication?
- Does my Cvent email need to have an unsubscribe option?
- Do my Cvent emails need to contain the Cvent footer and privacy policy?

Email Setup

- How do I add a new event planner email address?
- What should my Cvent emails include?
- Does my Cvent email need to have an unsubscribe option?
- Do my Cvent emails need to contain the Cvent footer and privacy policy?

Event Participants
● What are the different ways to record event participation? [169]
● Why should I bother recording event participation? [170]
● How can I use event participation data? [170]
● How do I access event participation data? [171]
● How do I record event participation data? [172]
● How do I view event participation in Salesforce? [173]
● How can I communicate with past attendees? [161]

Event Preparation

● What are planner alerts? [174]
● How do I print name badges and invoices in Cvent? [175]
● Can I track who didn't complete registration (abandoned registrants)? [176]

Financial Information

● What account code should I use? [177]
● What speedtype should I use? [177]
● What designation code should I use? [157]
● How do I get an account code, speedtype, or designation code added to Cvent? [47]*
● How do I issue a refund? [178]
● What is PCI compliance? [179]
● How can I accept credit card information outside Cvent? [179]
● What are Cvent's credit card fees? [180]
● How do I create a fundraising event? [157]
● What test credit card numbers can I use? [181]

Fundraising

● How do I create a fundraising event? [157]

Guests

● How do I configure my event to collect guest information (in addition to the primary registrant)? [182]
● How can I get event guests added to Salesforce? [183]

Images

● What image sizes should I use? [184]
● Where can I locate great CU photography? [98]
● Where can I learn more about CU branding? [185]

Integrations
• How does the Cvent-Salesforce integration work? [40]
• How can I find my Cvent event in Salesforce? [40]
• How can I get event guests added to Salesforce? [41]
• How can I track event attendees to get the most out of the Cvent-Salesforce integration? [42]
• Can I integrate Cvent with other platforms not supported by eComm? [186]

Invitation Forwarding

• How do I use invitation forwarding? [187]

Logging in and Password Help

• What is our Cvent account name? [100]
• What is my user name? [100]
• How do I reset my password? [100]

On-Site Tools and Support

• How can I run check-in at my event? [42]
• What is OnArrival? [42]
• Can I collect credit card payments on-site? [179]
• What devices support OnArrival? [42]
• Does OnArrival offer session check-in? [188]
• How can I get OnArrival Premium? [42]
• What is Event in a Box, and how much does it cost? [189]

Paid Event

• What account code should I use? [177]
• What speedtype should I use? [177]
• What designation code should I use? [157]
• How do I get an account code, speedtype, or designation code added to Cvent? [47]*
• How do I issue a refund? [178]
• What is PCI compliance? [179]
• How can I accept credit card information outside Cvent? [179]
• What are Cvent’s credit card fees? [177]
• How do I create a fundraising event? [157]
• What test credit card numbers can I use? [181]

Portal (for Reports)

• How can I give someone else at CU access to event Reports (for free)? [190]
• How are Reports managed in the Portal?* [191]

Promote Event
• How do I promote my event? [192]

Questions

• Adding Event Questions [193]

Registration Types

• Adding Registration Types [194]

Reporting

• How do I run Reports for my event? [195]
• What is the portal and how do I get Reports published to it? [190]*
• How can a stakeholder get access to view Cvent reports in real time? [190]*
• How do I create a report of events created by one user? [196]*

Sharing

• How do I share my event with another user? [197]

Support

• What kinds of support and resources can I get through Cvent? [140]

Survey

• Configure Event or Session Survey [198]
• How do I send a survey to my event participants? [198]

Templates

• Where can I view CU-branded event templates? [199]
• How do I access CU-branded event templates? [200]
• Where can I learn more about CU branding? [185]

Testing

• How should I test my event? [201]
• Is there a testing checklist that can help me be successful? [135]
• What test credit card numbers can I use? [181]
• Can I send a testing scenario to someone who isn't a Test User? [202]

Troubleshooting
• What are Cvent’s recommended browsers? [203]
• Special Characters in Cvent Event Titles & Payment Processing Issues [204]

Use

• Should I be a Cvent user? I host one event a year. [205]

Waitlists

• How do I set up event waitlists? [206]

Website

• Where do I find my event weblink? [192]
• How do I create a custom URL? [207]
• How do I hide my event from search engines? [208]

Something Else...

If our documentation couldn’t answer your question, please let us know. Submit a help ticket [59] so we can assist you.

Watch a short video [60] if you’re curious about how tickets get you the best and quickest response.

Now, click the + symbol next to the category that best describes your question to view available resources.

Apsona

• How do I add contacts using Apsona? [13]
• How do I match against existing contacts using Apsona? [13]
• How do I add campaign members in bulk using Apsona? [13]

Business Units and Marketing Cloud Permissions

• How do I grant access to a business unit or unit? [209]
• How do I view a user’s permissions? [209]
• How do I change a user’s permissions? [209]
• What roles and permissions should a user have? [210]
• What roles and permissions should an eComm Specialist have? [210]
• How do I integrate a user with Salesforce? [211]
• How do I request a new business unit? [212]

Campaigns

• How do I add contacts to a Salesforce campaign in bulk? [13]
• How do I share a campaign with another user? [14]
• How do I share a campaign with a public group? [14]
• Why do campaigns have such complicated names? [10]
• How do I add contacts to a Salesforce campaign in bulk? [13]

Chatter

• How do I post in Chatter? [15]
• How do I set my Chatter notifications? [15]
• Why am I not seeing all of my Chatter posts? [15]

Checklists & Quick Guides

All checklists & quick guides [75].

• Creating Data Extensions [83]
• Event Approval Checklist (used by eComm specialists) [155]

Cvent

• How do I approve an event? [213]
• Is there a checklist I should use when approving an event? [135]
• How do I add a new contact type? [47]
• How do I add a new event planner email address? [168]
• How do I get an account code, speedtype, or designation code added to Cvent? [168]
• How do I reset a user's password? [214]
• What is the Cvent Portal for Reports? [190]
• How do I manage Reports in the Cvent Portal? [191]
• How do I create a test user? [47]
• Can Cvent be integrated with other platforms not supported by eComm? [186]

Dashboards

• How do I create a dashboard? [31]

Data Extensions

• How do I build a data extension? [68]
• Can I import CSV data into a data extension? [84]

Duplicates
• Why are there duplicate contact records? [19]
• How do I merge two or more contacts? [19]

Email Preferences

• How do I modify a contact's email preferences? [33]
• How do I change the name of an existing email preference? [215]
• How do I create a new email preference? [215]

Onboarding

• What steps are involved in the onboarding process? [216]
• How do I know if a user is a good candidate for an eComm license? [217]
• How do I know what requests are in the queue to be addressed next month? [218]
• How can I check who passed the required post-training quiz? [218]
• What tasks need to be complete if a new user is joining an existing group? [219]

Password Resets & Permissions

• Marketing Cloud
  • What access should a Marketing Cloud User have? [210]
  • How do I reset a user's password or help them with multi-factor authentication (MFA)? [209]
  • How do I grant access to a business unit or unit? [209]
  • How do I view a user's permissions? [209]
  • How do I change a user's permissions? [209]
  • How do I integrate a user with Salesforce? [211]

• Cvent
  • What access should a Cvent user have? [220]

• General
  • What tasks must a user request from an eComm specialist? [47]
  • Is there a detailed breakdown of roles and responsibilities? [221]
  • What roles and permissions should a user have? [210]
  • What roles and permissions should an eComm Specialist have? [210]

Personalization

• How can I add personalized information (that is in Salesforce) to my Marketing Cloud email? [28]
• How can I add personalized information (that is not in Salesforce) to my Marketing Cloud email? [104]
• How do you preview/test personalization? [103]

Public Groups

• What is a public group? [222]
• How do I add users to an existing public group? [222]
• How do I create a new public group? [222]

Release Notes

• Quarterly Release Notes [141]

Reports

• How do I build Salesforce reports? [46]
• Check Report Unique Count [223]

Sender Profiles, Delivery Profiles, and Send Classifications

• How do I create a send classification? [224]
• How do I create a delivery profile? [225]
• What are send classifications, sender profiles, and delivery profiles? [95]
• How do I create a sender profile? [226]
• How do I verify a sender profile? [227]

Sharing

• How do I share an email? [92]
• How do I share in Salesforce (Campaigns, Reports and Dashboards)? [14]
• How do I share a Cvent event with another user? [197]

Subscribers

• What is a subscriber? [22]
• How can I view a subscriber? [120]
• How can I view subscriber status and what do the statuses mean? [120]
• How do I reactivate a subscriber? [120]
• How do I convert a subscriber key to a contact ID? [121]

Training

• What new user training is offered? [228]
• How are new users notified of training? [218]
• What tasks are users responsible for vs. an eComm specialist? (access levels and how-tos) [221]
• CAN-SPAM Quiz | Easy ways to avoid violating CAN-SPAM [36]

Users

•
All Users
- Where can I view all of the license holders on my campus? [229]

New Users
- How are do new users get access? [218]
- What are my roles and responsibilities when onboarding a new eComm user? [230]

Marketing Cloud
- How do I reset a Marketing Cloud password? [209]
- How do I unlock a user in Marketing Cloud [209]?
- How do I change a user's password in Marketing Cloud? [209]
- How do I integrate a Marketing Cloud user with Salesforce? [211]
- Why can't my user send an email in Marketing Cloud? [231]

Cvent
- How do I reset a Cvent password? [232]

Salesforce
- How do I reset a Salesforce password? [44]

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