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 [6]

Campaigns

- What is the difference between a campaign and a report? [7]
- What is the relationship between campaigns, reports, and data extensions? [8]
- How are campaigns connected to reports? [7]
- Why do campaigns have such complicated names? [9]
- How do I create a Salesforce campaign? [10]
- How do I modify or delete a campaign? [11]
- How do I add an individual contact to a Salesforce campaign? [10]
- How do I add contacts to a Salesforce campaign in bulk? [12]*
- Why can’t I see a certain campaign? [13]
- How do I share a campaign with another user? [13]*
- How do I share a campaign with a public group? [13]*

Chatter

- How do I post in Chatter? [14]
- How do I set my Chatter notifications? [14]
- Why am I not seeing all of my Chatter posts? [14]

Contacts

- How do I view a contact? [15]
- What is the difference between a Standard Contact and an Individual Contact? [16]
- How do I modify information on a contact (such as the email address)? [17]
- Why are there duplicate contact records? [18]
- How to I merge two or more contacts? [18]*
- How do I add a contact to a Salesforce campaign? [10]
- What are individual email results (IERs) and how can I use them? [19]
- How do I add contacts to Salesforce? [20]*
- How can I match new contacts against existing contacts to avoid creating duplicates? [12]*
- How will I know if a contact received my email? [19]
- How does a Salesforce contact relate to a Marketing Cloud Subscriber? [21]
- Is Salesforce GDPR compliant? [22]
- Understanding FERPA Flags [23]

Data

- What is eComm's data model? [24]
- What contacts exist in Salesforce? [24]
- Does Salesforce integrate with other CU data sources? [24]
- Is there an Entity Relationship Diagram(ERD)? [25]
- Is there a data dictionary? [26]
- Understanding FERPA Flags [23]
- Understanding Preferred Name [27]
- GeoCode Sunetting in 2023 [28]

Dashboards

- How would I view my Business Unit's email send data via a dashboard? [29]
- I want a dashboard for my email sends like the one on the Salesforce homepage. How do I create one? [30]*
- How do I view a Salesforce dashboard? [29]
- How do I filter a Salesforce dashboard? [29]
- How do I refresh a dashboard to be sure the data is current? [29]
- How do I subscribe to a Salesforce dashboard? [29]
- Why can’t I see a Salesforce dashboard? [13]

Email Preferences
- How do constituents manage their own email preferences? [31]
- How do I opt a contact out of all emails or specific email preferences? [32]*
- How do I opt a contact back in to all emails or specific email preferences? [32]*
- How do I change the name of an existing email preference? [33]*
- How do I create a new email preference? [33]*
- How do I respect a constituent’s email preferences? [34]
- How do eComm specialists respect a constituent’s email preferences? [35]*

Email Sends

- How do I view email send data in Salesforce? [36]

Events

- How do I locate my Cvent event in Salesforce? [9]
- How do I view event participation in Salesforce? [37]
- Why is my event campaign name so long in Salesforce? [9]

Folders

- How do I share folders and subfolders? [38]*

Integrations

- How are Marketing Cloud, Cvent and Salesforce integrated with one another? [24]
- How are CU's data sources integrated with Salesforce? [24]
- How does the Cvent-Salesforce integration work? [39]
- How can I find my Cvent event in Salesforce? [39]
- How can I get event guests added to Salesforce? [40]
- How can I track event attendees to get the most out of the Cvent-Salesforce integration? [41]
- GeoCode Sunetting in 2023 [28]

List Views

- What is a list view and how can it help me? [42]
- How do I create new list view or clone an existing one? [42]
- How do I switch between different list views? [42]
- How do I pin a list view? [42]

Logging In

- What is the login URL for Salesforce? [43]
- How do I reset my Salesforce password? [43]
- I am not receiving Marketing Cloud's identity validation email. What should I do? [44]
Notifications (Chatter)

- How do I post in Chatter? [14]
- How do I set my Chatter notifications? [14]
- Why am I not seeing all of my Chatter posts? [14]

Reports

- How do I build Salesforce reports? [45]*
- What is the difference between a campaign and a report? [7]
- What is the relationship between reports, campaigns, and data extensions? [8]
- Why do reports have such complicated names? [9]
- How do I request a new report? [46]
- How do I modify an existing report? [49]*
- What data can I use to build audience reports? [47]
- How do I view a report? [48]
- Reporting on Preferred Name.* [49]
- How do I share a report with another user? [13]*
- How do eComm specialist create Reports with CAN-SPAM compliance? [35]*
- GeoCode Sunsetting in 2023 [28]

Subscriptions

- Is there a way for me to grow my audience? [50]
- Can folks subscribe to recieve my communications? [50]

Troubleshooting

- How do I add a photo to my Salesforce profile? [51]
- Why did a specific person not receive my email? [52]
- Why can’t I see a specific campaign, report, or dashboard? [13]
- I think I found a bug in Salesforce. What should I do? [53]
- 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? [17]
- Why is a particular contact missing from my audience report? [54]
- Why can’t I send a Marketing Cloud message? [55]

Unsubscribe

- How do unsubscribes work? [56]
- How can a constituent unsubscribe or subscribe to communications? [56]
- How can a user view a constituents’ email preferences? [56]
- How can users avoid violating CAN-SPAM? [34]
- How do eComm specialists avoid violating CAN-SPAM? [35]*

Users

- How do I request to become an eComm user? [57]

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [58] so we can assist you.

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? [59]
- Are there additional training opportunities for more advanced Marketing Cloud users? [60]
- What is CAN-SPAM and how does it pertain to me? [61]
- How can users avoid violating CAN-SPAM? [34]
- 2023 Preference and Business Unit Optimization [6]

Accessibility

- What should I think about in terms of accessibility? [62]
- How can I ensure my email is accessible? [63]

Audience

- How can I email donors? [64]
- How do I select my audience? [65]
- How can I email my audience using their campus email addresses? [66]
- Why are my audience report names so complicated? [9]
- Can I use preferred name when communicating with my audience? [27]
- How do I add a new audience for my communications? [46]*

Automation

- How can I organize my work between Email Studio and Automation Studio? [67]
Canceling an Email

- How do I cancel a scheduled send? [70]

CAN-SPAM

- What is CAN-SPAM? [71]
- What is the difference between a commercial and transactional email? [72]
- What are easy ways for users to avoid violating CAN-SPAM? [34]

Checklists & Quick Guides

All checklists & quick guides [73].

- Plan
  - Marketing Cloud Email Checklist [74]
- Test
  - Email Checklist (download) [75]
  - Email Checklist (electronic) [76]
- Audience & Sending
  - Update Audience Quick Tutorial (re-start Data Extension) [77]
  - Send Emails [78]
    - Salesforce Send Email Quick Tutorial [79]
    - Guided Send Quick Tutorial [80]
- For eComm Specialists
  - Creating Data Extensions [81]*

Data Extensions

- What is a data extension? [66]
- What is the relationship between data extensions, reports, and campaigns? [8]
- How do I build a data extension? [66]
- How do I import/refresh a data extension? [66]
- Can I import CSV data into a data extension? [82]*
- How do I delete a data extension? [83]
- Can preferred name be included in a Data Extension for personalization?* [49]

Dynamic Content

- Can Marketing Cloud emails have dynamic content to be custom to recipients based on pre-determined attributes? [84]
- Can I avoid sending multiple versions of a similar emails by using Dynamic Content? [84]

Einstein
• What is Einstein in Marketing Cloud? [85]
• Is artificial intelligence (AI) available to increase engagement with my emails? [85]
• 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 in to the spreadsheet [86] (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? [87]
• Where can I access CU branded templates? [88]
• How do I save an email as a template? [89]
• How do I share an email? [90]*
• How do I create compelling content? [91]
• How do I use templates I’ve created to build an email? [92]

Email From Information

• What are send classifications, sender profiles, and delivery profiles? [93]
• How do I change my email from name? [46]*
• How do I change my email from address? [46]*
• What is the CU Footer for All emails? [31]

Folders

• How can I stay organized in Marketing Cloud? [94]
• How can I organize Salesforce Send Emails? [94]
• How can I organize Data Extensions? [94]
• How can I organize Tracking? [94]

Images

• How should I size my images? [95]
• Where can I locate great CU photography? [96]

Journey Builder

• Can I pre-set a series of emails to deliver to an audience to be more efficient? [97]
• 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? [97]

Login and Password Help

• How do I change my password? [43]
• What is my user name? [98]
Mobile

- How do I design for mobile? [99]
- How do I correct my top image display in mobile? [100]

Personalization

- How can I add personalization (from Salesforce) to my Marketing Cloud email? [27]
- How can I test or preview personalization in my email to ensure I did it correctly? [101]
- How can I add other personalized information (from outside of Salesforce) to my Marketing Cloud email? [102]*
- Preferred Name Rollout for eComm Specialists. [49]*

Reporting

- How do I use Discover Reports in Marketing Cloud? [103]
- How do I use the Audience Engagement Over Time report? [104]
- How do I use the Best Performing Send Day report? [105]
- How do I use the Deliverability - Complaint Rate report? [106]
- How do I use the Device Performance by Email Sends and Email Performance by Device reports? [107]
- How do I use the Recent Email Send Summary report? [108]
- How do I use the Time Between Send and Engagement report? [109]

Send/Schedule an Email

- How do I send an email? [78] (Guided Send or Salesforce Send Email options)
- Where can I view/cancel my scheduled email? [110]
- What is the relationship between campaigns, reports, and data extensions? [8]
- Why do I need an email footer and what should be in it? [111]
- What is throttling and how do I do it? [112]
- What should I consider when scheduling an email? [113]

Subject Lines and Preheaders

- How do I choose a subject line? [114]
- What is a preheader? [115]
- Can I add personalized data to the subject line and preheader? [116]
- How do I add an emoji to my subject line or preheader? [117]

Subscriptions
- Is there a way for me to grow my audience? [50]
- Can folks subscribe to receive my communications? [50]

Subscribers in Marketing Cloud

- What is a subscriber? [21]
- How can I view a subscriber? [118]
- How can I view subscriber status and what do the statuses mean? [118]
- How do I reactivate a subscriber? [118]*
- How do I convert a subscriber key to a contact ID? [119]

Testing

- How do I send a test email? [120]
- What should I look for in a successful test? [121]
- What is an A/B test and how do I perform one? [122]
- How can I test personalization? [101]
- Does the data appear in Salesforce? [123]

Templates

- Can I view CU and UCCS branded templates? [124]
- How can I access CU and UCCS branded templates? [125]
- How do I save an email as a template? [126]
- How do I use templates I've created to build an email? [92]

Tracking and Reporting

- Why is tracking important? [127]
- Where can I view tracking information for my email? [128]
- How can I export tracking information for my email? [129]*
- How can I compare the data of different email sends? [129]
- What is Datorama? [130]
- What is Einstein? [85]

Troubleshooting

- My message ended up in a spam folder. How can I prevent this? [131]
- How do I fix a broken link in an email I already sent? [132]
- Are there checklists that can help me do my job better? [133]
- With what browsers is Marketing Cloud compatible? [134]
- Why didn’t a contact receive my email? [52]
- Why can’t I send emails from Marketing Cloud? [55]
- I can’t see the audience list I’m sending to. What should I do? [13]

Unsubscribe
• How do unsubscribes work? [56]
• How can a constituent unsubscribe or subscribe to communications? [56]
• How can a user view a constituents’ email preferences? [56]

Users

• How do I add a new user or update a license? [135]

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [58] so we can assist you.

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? [136]
• What’s the difference between Flex and Express Events? [137]
• How can I contact Cvent Help & Support? [138]
• How can I get Cvent certified? [139]
• Does Cvent offer training and support resources? [138]

Abstract Management

• What is Abstract Management? [140]
• How do I get Abstract Management and other Cvent add-ons? [141]

Accessibility

• How can I plan an accessible event? [142]

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

• What additional Cvent products are available for purchase? [141]
App

- Does Cvent have an app for event attendees? [143]
  - What is CrowdCompass? [143]
  - How far ahead should I plan if I'm going to use CrowdCompass? [143]
  - How much does CrowdCompass cost? [144]
  - Is there a way I can offset CrowdCompass costs? [144]
- Does Cvent have an app for event planners to check attendees in? [41]
  - What is OnArrival? [41]

Approval and Launch

- How do I submit my event for approval? [145]
- Why do I have to submit my event for approval? [145]
- How do I launch my event? [145]

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? [141]

Capacity

- How do I give my event or agenda items a capacity? [147]

Checklists & Quick Guides

All checklists & quick guides. [73]

- Plan
  - Cvent Build Checklist [148]
  - Event Strategy Checklist [149]
- Test
  - Event Checklist (download) [150]
  - Event Checklist (electronic) [151]
- Event Approval & Launch
  - How-To Request Approval & Launch Event [152]
  - Event Approval Checklist (used by eComm specialists) [153]
  - What to check before opening registration (from Cvent) [154]
- Fundraising Events
  - Create a fundraising event [155]

Classic Sunset
• When is Cvent Classic sunsetting?  
• Are there live, virtual trainings to help me transition away from Classic?  
• Are there trainings 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?  
• Why should I bother recording event participation?  
• How can I use event participation data?  
• How do I access event participation data?  
• How do I record event participation data?
• How do I view event participation in Salesforce? [171]
• How can I communicate with past attendees? [159]

Event Preparation

• What are planner alerts? [172]
• How do I print name badges and invoices in Cvent? [173]
• Can I track who didn’t complete registration (abandoned registrants)? [174]

Express

• How can I get started with Cvent Express? [175]

Financial Information

• What account code should I use? [176]
• What speedtype should I use? [176]
• What designation code should I use? [155]
• How do I get an account code, speedtype, or designation code added to Cvent? [46]*
• How do I issue a refund? [177]
• What is PCI compliance? [178]
• How can I accept credit card information outside Cvent? [178]
• What are Cvent’s credit card fees? [179]
• How do I create a fundraising event? [155]
• What test credit card numbers can I use? [180]

Flex

• What is Cvent Flex? [181]
• Should I transition to Cvent Flex? [182]
• How should I transition to Cvent Flex? [183]
• What are the available (and unavailable) features in Cvent Flex? [184]
• Where can I see some examples of Cvent Flex events? [185]
• Are CU branded Flex templates available to clone? [186]
• Is there basic training available for Flex? [187]
• Is there advanced training available for Flex? [188]
• What else should I be asking about Flex? [189]
• Are there specific image dimensions when using Flex? [190]

Fundraising

• How do I create a fundraising event? [155]

Guests

• How do I configure my event to collect guest information (in addition to the primary registrant)?
• How can I get event guests added to Salesforce? [192]

Images

• What image sizes should I use? (Cvent Flex) [190]
• Where can I locate great CU photography? [96]
• Where can I learn more about CU branding? [193]

Integrations

• How does the Cvent-Salesforce integration work? [39]
• How can I find my Cvent event in Salesforce? [39]
• How can I get event guests added to Salesforce? [40]
• How can I track event attendees to get the most out of the Cvent-Salesforce integration? [41]
• Can I integrate Cvent with other platforms not supported by eComm? [194]

Invitation Forwarding

• How do I use invitation forwarding? [195]

Logging in and Password Help

• What is our Cvent account name? [98]
• What is my user name? [98]
• How do I reset my password? [98]

On-Site Tools and Support

• How can I run check-in at my event? [41]
• What is OnArrival? [41]
• Can I collect credit card payments on-site? [178]
• What devices support OnArrival? [41]
• Does OnArrival offer session check-in? [196]
• How can I get OnArrival Premium? [41]
• What is Event in a Box, and how much does it cost? [197]

Paid Event

• What account code should I use? [178]
• What speedtype should I use? [176]
• What designation code should I use? [155]
• How do I get an account code, speedtype, or designation code added to Cvent? [46]*
• How do I issue a refund? [177]
• What is PCI compliance? [178]
• How can I accept credit card information outside Cvent? [178]
- What are Cvent's credit card fees? [176]
- How do I create a fundraising event? [155]
- What test credit card numbers can I use? [180]

Questions

- Adding Event Questions [198]

Promote Event

- How do I promote my event? [199]

Registration Types

- Adding Registration Types [200]

Reporting

- How do I run Reports for my event? [201]
- What is the portal and how do I get Reports published to it? [202]*
- How can a stakeholder get access to view Cvent reports in real-time? [202]*
- How do I create a report of events created by one user? [203]*

Sharing

- How do I share my event with another user? [204]

Support

- What kinds of support and resources can I get through Cvent? [138]

Survey

- Configure Event or Session Survey [205]
- How do I send a survey to my event participants? [205]

Templates

- Where can I view CU-branded event templates? [186]
- How do I access CU-branded event templates? [206]
- Where can I learn more about CU branding? [193]

Testing
• How should I test my event? [207]
• Is there a testing checklist that can help me be successful? [133]
• What test credit card numbers can I use? [180]

Troubleshooting

• What are Cvent's recommended browsers? [208]
• Special Characters in Cvent Event Titles & Payment Processing Issues [209]

Use

• Should I be a Cvent user? I host one event a year. [210]

Waitlists

• How do I set up event waitlists? [211]

Website

• Where do I find my event weblink? [199]
• How do I create a custom URL? [212]
• How do I hide my event from search engines? [213]

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [58] so we can assist you.

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? [12]
• How do I match against existing contacts using Apsona? [12]
• How do I add campaign members in bulk using Apsona? [12]

Business Units and Marketing Cloud Permissions

• How do I grant access to a business unit or unit? [214]
• How do I view a user's permissions? [214]
• How do I change a user's permissions? [214]
• What roles and permissions should a user have? [215]
• What roles and permissions should an eComm Specialist have? [215]
• How do I integrate a user with Salesforce? [216]
• How do I request a new business unit? [217]

Campaigns

• How do I add contacts to a Salesforce campaign in bulk? [12]
• How do I share a campaign with another user? [13]
• How do I share a campaign with a public group? [13]
• Why do campaigns have such complicated names? [9]
• How do I add contacts to a Salesforce campaign in bulk? [12]

Chatter

• How do I post in Chatter? [14]
• How do I set my Chatter notifications? [14]
• Why am I not seeing all of my Chatter posts? [14]

Checklists & Quick Guides

All checklists & quick guides [73].

• Creating Data Extensions [81]
• Event Approval Checklist (used by eComm specialists) [153]

Cvent

• How do I approve an event? [218]
• Is there a checklist I should use when approving an event? [133]
• How do I add a new contact type? [46]
• How do I add a new event planner email address? [166]
• How do I get an account code, speedtype, or designation code added to Cvent? [166]
• How do I reset a user's password? [219]
• What is the Cvent Portal for Reports? [202]
• How do I manage Reports in the Cvent Portal? [220]
• How do I create a test user? [46]
• Can Cvent be integrated with other platforms not supported by eComm? [194]

Dashboards

• How do I create a dashboard? [30]

Data Extensions

• How do I build a data extension? [66]
Can I import CSV data into a data extension? [82]

Duplicates

- Why are there duplicate contact records? [18]
- How do I merge two or more contacts? [18]

Email Preferences

- How do I modify a contact's email preferences? [32]
- How do I change the name of an existing email preference? [221]
- How do I create a new email preference? [221]

Onboarding

- What steps are involved in the onboarding process? [222]
- How do I know if a user is a good candidate for an eComm license? [223]
- How do I know what requests are in the queue to be addressed next month? [224]
- How can I check who passed the required post-training quiz? [224]
- What tasks need to be complete if a new user is joining an existing group? [225]

Password Resets & Permissions

- Marketing Cloud
  - What access should a Marketing Cloud User have? [215]
  - How do I reset a user's password or help them with multi-factor authentication (MFA)? [214]
  - How do I grant access to a business unit or unit? [214]
  - How do I view a user’s permissions? [214]
  - How do I change a user’s permissions? [214]
  - How do I integrate a user with Salesforce? [216]
- Cvent
  - What access should a Cvent user have? [226]
- General
  - What tasks must a user request from an eComm specialist? [46]
  - Is there a detailed breakdown of roles and responsibilities? [227]
  - What roles and permissions should a user have? [215]
  - What roles and permissions should an eComm Specialist have? [215]

Personalization

- How can I add personalized information (that is in Salesforce) to my Marketing Cloud email? [27]
- How can I add personalized information (that is not in Salesforce) to my Marketing Cloud email? [102]
- How do you preview/test personalization? [101]
Public Groups

- What is a public group? [228]
- How do I add users to an existing public group? [228]
- How do I create a new public group? [228]

Reports

- How do I build Salesforce reports? [45]
- Check Report Unique Count [229]

Sender Profiles, Delivery Profiles, and Send Classifications

- How do I create a send classification? [230]
- How do I create a delivery profile? [231]
- What are send classifications, sender profiles, and delivery profiles? [93]
- How do I create a sender profile? [232]
- How do I verify a sender profile? [233]

Sharing

- How do I share an email? [90]
- How do I share in Salesforce (Campaigns, Reports and Dashboards)? [13]
- How do I share a Cvent event with another user? [204]

Subscribers

- What is a subscriber? [21]
- How can I view a subscriber? [118]
- How can I view subscriber status and what do the statuses mean? [118]
- How do I reactivate a subscriber? [118]
- How do I convert a subscriber key to a contact ID? [119]

Training

- What new user training is offered? [234]
- How are new users notified of training? [224]
- What tasks are users responsible for vs. an eComm specialist? (access levels and how-tos) [227]
- CAN-SPAM Quiz | Easy ways to avoid violating CAN-SPAM [35]

Users
- **All Users**
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