

Need eComm Help? Start Here. ^[1]



April 15, 2025 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]
- [Quarterly Release Notes](#) ^[6]
- **[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 create a Salesforce campaign?](#) ^[11]
- [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

- 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]

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 do 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? ^[13]*
- 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 view a Salesforce dashboard? ^[30]
- How do I filter a Salesforce dashboard? ^[30]
- 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? [36]*

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 do I exclude an audience? ^[68]
- How can I email my audience using their campus email addresses? ^[69]

- 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? ^[70]
- How do I schedule a Salesforce Send Email in Automation Studio? ^[71]
- How do I schedule Data Extension imports in Automation Studio? ^[72]

Canceling an Email

- How do I cancel a scheduled send? ^[73]

CAN-SPAM

- What is CAN-SPAM? ^[74]
- What is the difference between a commercial and transactional email? ^[75]
- What are easy ways for users to avoid violating CAN-SPAM? ^[35]
- How can I check if my email will likely be caught in SPAM filters? ^[76]

Checklists & Quick Guides

All checklists & quick guides ^[77].

- Plan
 - Marketing Cloud Email Checklist ^[78]
- Test
 - Email Checklist (download) ^[79]
 - Email Checklist (electronic) ^[80]
- Audience & Sending
 - Update Audience Quick Tutorial (re-start Data Extension) ^[81]
 - Send Emails ^[82]
 - Salesforce Send Email Quick Tutorial ^[83]
 - Guided Send Quick Tutorial ^[84]
- For eComm Specialists
 - Creating Data Extensions ^[85]*

Data Extensions

- What is a data extension? ^[69]
- What is the relationship between data extensions, reports, and campaigns? ^[9]
- How do I build a data extension? ^[69]*
- Data Extension Creation 1-Pager ^[86]*
- How do I import/refresh a data extension? ^[69]
- Can I import CSV data into a data extension? ^[87]*
- How do I delete a data extension? ^[88]

- How do I recover a deleted data extension? [88]
- Can the preferred name be included in a Data Extension for personalization?* [50]

Dynamic Content

- Can Marketing Cloud emails have dynamic content that is custom to recipients based on pre-determined attributes? [89]
- Can I avoid sending multiple versions of similar emails by using Dynamic Content? [89]

Einstein

- What is Einstein in Marketing Cloud? [90]
- Is artificial intelligence (AI) available to increase engagement with my emails? [90]
 - 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 the spreadsheet [91] (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? [92]
- Where can I access CU-branded templates? [93]
- How do I save an email as a template? [94]
- How do I share an email? [95]*
- How do I create compelling content? [96]
- How do I use templates I've created to build an email? [97]
- How do I paste an HTML email? [98]
- How do I use an HTML button? [98]
- How can I check if my email will likely be caught in SPAM filters? [76]

Email From Information

- What are send classifications, sender profiles, and delivery profiles? [99]
- How do I change my email from name? [47]*
- How do I change my email from address? [47]*
- What is the CU Footer for All emails? [32]

Folders

- How can I stay organized in Marketing Cloud? [100]
- How can I organize Salesforce Send Emails? [100]
- How can I organize Data Extensions? [100]
- How can I organize Tracking? [100]

HTML

- How do I paste an HTML email? [98]

- How do I use an HTML button? [98]

Images

- How should I size my images? [101]
- Where can I locate great CU photography? [102]

Journey Builder

- Can I pre-set a series of emails to deliver to an audience to be more efficient? [103]
- 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? [103]

Login and Password Help

- How do I change my password? [44]
- What is my username? [104]

Mobile

- How do I design for mobile? [105]
- How do I correct my top image display on mobile? [106]

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? [107]
- How can I add other personalized information (from outside of Salesforce) to my Marketing Cloud email? [108]*
- Preferred Name Rollout for eComm Specialists. [50]*

Reporting

- How do I use Discover Reports in Marketing Cloud? [109]
- How do I use the Audience Engagement Over Time report? [110]
- How do I use the Best Performing Send Day report? [111]
- How do I use the Deliverability - Complaint Rate report? [112]
- How do I use the Device Performance by Email Sends and Email Performance by Device reports? [113]
- How do I use the Recent Email Send Summary report? [114]
- How do I use the Time Between Send and Engagement report? [115]
- How do I Report on a preferred name? [50]

Send/Schedule an Email

- How do I send an email? ^[82] (Guided Send or Salesforce Send Email options)
- Where can I view/cancel my scheduled email? ^[116]
- What is the relationship between campaigns, reports, and data extensions? ^[9]
- Why do I need an email footer and what should be in it? ^[117]
- What is throttling and how do I do it? ^[118]
- What should I consider when scheduling an email? ^[119]
- How can I check if my email will likely be caught in SPAM filters? ^[76]

Share Email or Assets

- How do I share an email with another Business Unit? ^[120]*

Subject Lines and Preheaders

- How do I choose a subject line? ^[121]
- What is a preheader? ^[122]
- Can I add personalized data to the subject line and preheader? ^[123]
- How do I add an emoji to my subject line or preheader? ^[124]

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? ^[125]
- How can I view subscriber status, and what do the statuses mean? ^[125]
- How do I reactivate a subscriber? ^[125]*
- How do I convert a subscriber key to a contact ID? ^[126]

Testing

- How do I send a test email? ^[127]
- What should I look for in a successful test? ^[128]
- What is an A/B test, and how do I perform one? ^[129]
- How can I test personalization? ^[107]
- Does the data appear in Salesforce? ^[130]
- How can I check if my email will likely be caught in SPAM filters? ^[76]

Templates

- Can I view CU and UCCS branded templates? ^[131]
- How can I access CU and UCCS branded templates? ^[132]

- [How do I save an email as a template?](#) ^[133]
- [How do I use the templates I've created to build an email?](#) ^[97]

Tracking and Reporting

- [Why is tracking important?](#) ^[134]
- [Where can I view tracking information for my email?](#) ^[135]
- [How can I export tracking information for my email?](#) ^[136]*
- [How can I compare the data of different email sends?](#) ^[136]
- [What is Datorama?](#) ^[137]
- [What is Einstein?](#) ^[90]

Troubleshooting

- [My message ended up in a spam folder. How can I prevent this?](#) ^[76]
- [How do I fix a broken link in an email I've already sent?](#) ^[138]
- [Are there checklists that can help me do my job better?](#) ^[139]
- [With what browsers is Marketing Cloud compatible?](#) ^[140]
- [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 constituent's email preferences?](#) ^[57]

Users

- [How do I add a new user or update a license?](#) ^[141]*

Something Else...

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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? [142]
 - Cvent Academy (including certifications) [143]
- How can I contact Cvent Help & Support? [144]
- Does Cvent offer training and support resources? [144]
- Quarterly Cvent Release Notes [145]

Abstract Management

- What is Abstract Management? [146]
- How do I get Abstract Management and other Cvent add-ons? [147]

Accessibility

- How can I plan an accessible event? [148]

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

- What additional Cvent products are available for purchase? [147]

App

- Does Cvent have an app for event attendees? [149]
 - What is CrowdCompass? [149]
 - How far ahead should I plan if I'm going to use CrowdCompass? [149]
 - How much does CrowdCompass cost? [150]
 - Is there a way I can offset CrowdCompass costs? [150]
- 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? [151]
- Why do I have to submit my event for approval? [151]
- How do I launch my event? [151]

Attendee Hub

- Does Cvent have a product to help support virtual or hybrid events? ^[152]
- What is Virtual Attendee Hub? ^[152]
- How do I get Attendee Hub and other Cvent add-ons? ^[147]

Capacity

- How do I give my event or agenda items a capacity? ^[153]

Checklists & Quick Guides

All checklists & quick guides. ^[77]

- Plan
 - Cvent Build Checklist ^[154]
 - Event Strategy Checklist ^[155]
- Test
 - Event Checklist (download) ^[156]
 - Event Checklist (electronic) ^[157]
- Event Approval & Launch
 - How-To Request Approval & Launch Event ^[158]
 - Event Approval Checklist (used by event approvers) ^[159]
 - What to check before opening registration (from Cvent) ^[160]
- Fundraising Events
 - Create a fundraising event ^[161]

Contacts

- How do I add a new contact type for my event? ^[47]*

CrowdCompass

- What is CrowdCompass? ^[149]
- Does Cvent have a mobile app to support events? ^[149]
- How do I get CrowdCompass and other Cvent add-ons? ^[147]

Email

Email Communication

- How can I communicate with past attendees? [162]
- How do I send event and session emails? [163]
- How can I ensure an email was sent and delivered? [164]
- Why wasn't an email delivered? [164]
- If I send an event reminder in Marketing Cloud, how do I exclude those who are already registered? [68]
- How can I use event participation data? [165]

Email Policies

- How do I send an event invitation through Cvent? [166]
- What event emails are sent through Cvent? [166]
- What is the difference between commercial and transactional communication? [167]
- Does my Cvent email need to have an unsubscribe option? [167]
- Do my Cvent emails need to contain the Cvent footer and privacy policy? [168]
- If a contact is opted out in Cvent, can I opt them back in? [164]

Email Setup

- How do I add a new event planner email address? [169]*
- What should my Cvent emails include? [168]
- Does my Cvent email need to have an unsubscribe option? [167]
- Do my Cvent emails need to contain the Cvent footer and privacy policy? [168]

Event Participants

- What are the different ways to record event participation? [170]
- Why should I bother recording event participation? [171]
- How can I use event participation data? [171]
- How do I access event participation data? [172]
- How do I record event participation data? [173]
- How do I view event participation in Salesforce? [174]
- How can I communicate with past attendees? [162]

Event Preparation

- What are planner alerts? [175]
- How do I print name badges and invoices in Cvent? [176]
- Can I track who didn't complete registration (abandoned registrants)? [177]

Financial Information

- What account code should I use? [178]
- What speedtype should I use? [178]
- What designation code should I use? [161]
- How do I get an account code, speedtype, or designation code added to Cvent? [47]*
- How do I issue a refund? [179]

- What is PCI compliance? ^[180]
- How can I accept credit card information outside Cvent? ^[180]
- What are Cvent's credit card fees? ^[181]
- How do I create a fundraising event? ^[161]
- What test credit card numbers can I use? ^[182]

Fundraising

- How do I create a fundraising event? ^[161]

Guests

- How do I configure my event to collect guest information (in addition to the primary registrant)? ^[183]
- How can I get event guests added to Salesforce? ^[184]

Images

- What image sizes should I use? ^[185]
- Where can I locate great CU photography? ^[102]
- Where can I learn more about CU branding? ^[186]

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? ^[187]

Invitation Forwarding

- How do I use invitation forwarding? ^[188]

Logging in and Password Help

- What is our Cvent account name? ^[104]
- What is my username? ^[104]
- How do I reset my password? ^[104]

On-Site Tools and Support

- How can I run a check-in at my event? ^[42]
- What is OnArrival? ^[42]
- Can I collect credit card payments on-site? ^[180]

- What devices support OnArrival? [42]
- Does OnArrival offer session check-in? [189]
- How can I get OnArrival Premium? [42]
- What is Event in a Box, and how much does it cost? [190]

Paid Event

- What account code should I use? [178]
- What speedtype should I use? [178]
- What designation code should I use? [161]
- How do I get an account code, speedtype, or designation code added to Cvent? [47]*
- How do I issue a refund? [179]
- What is PCI compliance? [180]
- How can I accept credit card information outside Cvent? [180]
- What are Cvent's credit card fees? [178]
- How do I create a fundraising event? [161]
- What test credit card numbers can I use? [182]

Portal (for Reports)

- How can I give someone else at CU access to event Reports (for free)? [191]
- How are Reports managed in the Portal?* [192]

Promote Event

- How do I promote my event? [193]

Questions

- Adding Event Questions [194]

Registration Types

- Adding Registration Types [195]

Reporting

- How do I run Reports for my event? [196]
- What is the portal and how do I get Reports published to it? [191]*
- How can a stakeholder get access to view Cvent reports in real time? [191]*
- How do I create a report of events created by one user? [197]*
- How can I leverage the data available in Cvent to show my event was successful? [198]

Sharing

- How do I share my event with another user? [199]

Support

- What kinds of support and resources can I get through Cvent? [144]

Survey

- Configure Event or Session Survey [200]
- How do I send a survey to my event participants? [200]

Templates

- Where can I view CU-branded event templates? [201]
- How do I access CU-branded event templates? [202]
- Where can I learn more about CU branding? [186]

Testing

- How should I test my event? [203]
- Is there a testing checklist that can help me be successful? [139]
- What test credit card numbers can I use? [182]
- Can I send a testing scenario to someone who isn't a Test User? [204]

Troubleshooting

- What are Cvent's recommended browsers? [205]
- Special Characters in Cvent Event Titles & Payment Processing Issues [206]

Use

- Should I be a Cvent user? I host one event a year. [207]

Waitlists

- How do I set up event waitlists? [208]

Website

- Where do I find my event weblink? [193]
- How do I create a custom URL? [209]
- How do I hide my event from search engines? [210]

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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]

Billing

- [How is my campus billed for eComm licenses?](#) ^[211]

Business Units and Marketing Cloud Permissions

- [How do I grant access to a business unit or unit?](#) ^[212]
- [How do I view a user's permissions?](#) ^[212]
- [How do I change a user's permissions?](#) ^[212]
- [What roles and permissions should a user have?](#) ^[213]
- [What roles and permissions should an eComm Specialist have?](#) ^[213]
- [How do I integrate a user with Salesforce?](#) ^[214]
- [How do I request a new business unit?](#) ^[215]

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]
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- [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 ^[77].

- Creating Data Extensions ^[85]
- Event Approval Checklist (used by eComm specialists) ^[159]

Cvent

- How do I approve an event? ^[216]
- Is there a checklist I should use when approving an event? ^[139]
- How do I add a new contact type? ^[47]
- How do I add a new event planner email address? ^[169]
- How do I get an account code, speedtype, or designation code added to Cvent? ^[169]
- How do I reset a user's password? ^[217]
- What is the Cvent Portal for Reports? ^[191]
- How do I manage Reports in the Cvent Portal? ^[192]
- How do I create a test user? ^[47]
- Can Cvent be integrated with other platforms not supported by eComm? ^[187]

Dashboards

- How do I create a dashboard? ^[31]

Data Extensions

- How do I build a data extension? ^[69]
- Data Extension 1-pager ^[86]
- Can I import CSV data into a data extension? ^[87]
- How do I unarchive data extensions? ^[7] (see blue box under eComm Specialist Impacts & Training)

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? ^[218]
- How do I create a new email preference? ^[218]

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