

## **Need eComm Help? Start Here.** [1]



February 5, 2026 by [jennifer.mortensen](#) [2]

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

- [Salesforce & Event Management](#)
- [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**

#### [Salesforce New User Training](#) [4]

- [Salesforce Overview](#) [5]
- [Quarterly Release Notes](#) [6]

#### [eComm Event Management Training](#) [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]

## eComm Event Management

- eComm Event Management Training [7]

## 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?](#) [5]
- [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](#)** [64]

## Accessibility

- [What should I think about in terms of accessibility?](#) [65]
- [How can I ensure my email is accessible?](#) [66]

## Audience

- How can I email donors? [67]
- How do I select my audience? [68]
- How do I exclude an audience? [69]
- How can I email my audience using their campus email addresses? [70]
- 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? [71]
- How do I schedule a Salesforce Send Email in Automation Studio? [72]
- How do I schedule Data Extension imports in Automation Studio? [73]

## Canceling an Email

- How do I cancel a scheduled send? [74]

## CAN-SPAM

- What is CAN-SPAM? [75]
- What is the difference between a commercial and transactional email? [76]
- 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? [77]

## Checklists & Quick Guides

All checklists & quick guides [78].

- Plan
  - Marketing Cloud Email Checklist [79]
- Test
  - Email Checklist (download) [80]
  - Email Checklist (electronic) [81]
- Audience & Sending
  - Update Audience Quick Tutorial (re-start Data Extension) [82]
  - Send Emails [83]
    - Salesforce Send Email Quick Tutorial [84]
    - Guided Send Quick Tutorial [85]
- For eComm Specialists
  - Creating Data Extensions [86]\*

## Data Extensions

- What is a data extension? [70]
- What is the relationship between data extensions, reports, and campaigns? [9]

- How do I build a data extension? [70]\*
- Data Extension Creation 1-Pager [87]\*
- How do I import/refresh a data extension? [70]
- Can I import CSV data into a data extension? [88]\*
- How do I delete a data extension? [89]
- How do I recover a deleted data extension? [89]
- 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? [90]
- Can I avoid sending multiple versions of similar emails by using Dynamic Content? [90]

## Einstein

- What is Einstein in Marketing Cloud? [91]
- Is artificial intelligence (AI) available to increase engagement with my emails? [91]
  - 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 [92] (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? [93]
- Where can I access CU-branded templates? [94]
- How do I save an email as a template? [95]
- How do I share an email? [96]\*
- How do I create compelling content? [97]
- How do I use templates I've created to build an email? [98]
- How do I paste an HTML email? [99]
- How do I use an HTML button? [99]
- How can I check if my email will likely be caught in SPAM filters? [77]

## Email From Information

- What are send classifications, sender profiles, and delivery profiles? [100]
- 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? [101]
- How can I organize Salesforce Send Emails? [101]
- How can I organize Data Extensions? [101]

- How can I organize Tracking? [101]

## Forward to a Friend

- 'Forward to a Friend' Not Available [102]

## HTML

- How do I paste an HTML email? [99]
- How do I use an HTML button? [99]

## Images

- How should I size my images? [103]
- Where can I locate great CU photography? [104]

## Journey Builder

- Can I pre-set a series of emails to deliver to an audience to be more efficient? [105]
- 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? [105]

## Login and Password Help

- How do I change my password? [44]
- What is my username? [106]

## Mobile

- How do I design for mobile? [107]
- How do I correct my top image display on mobile? [108]

## 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? [109]
- How can I add other personalized information (from outside of Salesforce) to my Marketing Cloud email? [110]\*
- Preferred Name Rollout for eComm Specialists. [50]\*

## Reporting

- How do I use Discover Reports in Marketing Cloud? [111]
- How do I use the Audience Engagement Over Time report? [112]
- How do I use the Best Performing Send Day report? [113]

- How do I use the Deliverability - Complaint Rate report? [114]
- How do I use the Device Performance by Email Sends and Email Performance by Device reports? [115]
- How do I use the Recent Email Send Summary report? [116]
- How do I use the Time Between Send and Engagement report? [117]
- How do I Report on a preferred name? [50]

## Send/Schedule an Email

- How do I send an email? [83] (Guided Send or Salesforce Send Email options)
- Where can I view/cancel my scheduled email? [118]
- What is the relationship between campaigns, reports, and data extensions? [9]
- Why do I need an email footer and what should be in it? [119]
- What is throttling and how do I do it? [120]
- What should I consider when scheduling an email? [121]
- How can I check if my email will likely be caught in SPAM filters? [77]

## Share Email or Assets

- How do I share an email with another Business Unit? [122]\*

## Subject Lines and Preheaders

- How do I choose a subject line? [123]
- What is a preheader? [124]
- Can I add personalized data to the subject line and preheader? [125]
- How do I add an emoji to my subject line or preheader? [126]

## 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? [127]
- How can I view subscriber status, and what do the statuses mean? [127]
- How do I reactivate a subscriber? [127]\*
- How do I convert a subscriber key to a contact ID? [128]

## Testing

- How do I send a test email? [129]
- What should I look for in a successful test? [130]
- What is an A/B test, and how do I perform one? [131]

- How can I test personalization? [109]
- Does the data appear in Salesforce? [132]
- How can I check if my email will likely be caught in SPAM filters? [77]

## Templates

- Can I view CU and UCCS branded templates? [133]
- How can I access CU and UCCS branded templates? [134]
- How do I save an email as a template? [135]
- How do I use the templates I've created to build an email? [98]

## Tracking and Reporting

- Why is tracking important? [136]
- Where can I view tracking information for my email? [137]
- How can I export tracking information for my email? [138]\*
- How can I compare the data of different email sends? [138]
- What is Datorama? [139]
- What is Einstein? [91]

## Troubleshooting

- My message ended up in a spam folder. How can I prevent this? [77]
- How do I fix a broken link in an email I've already sent? [140]
- Are there checklists that can help me do my job better? [141]
- With what browsers is Marketing Cloud compatible? [142]
- 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? [143]\*

## 'View in Browser'

- When does the 'View in Browser' link expire? [144]

## Something Else...

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

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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?](#) [5]
- [What Cvent training is available?](#) [145]
  - [Cvent Academy \(including certifications\)](#) [146]
- [How can I contact Cvent Help & Support?](#) [147]
- [Does Cvent offer training and support resources?](#) [147]
- [Quarterly Cvent Release Notes](#) [148]

## Abstract Management

- [What is Abstract Management?](#) [149]
- [How do I get Abstract Management and other Cvent add-ons?](#) [150]

## Accessibility

- [How can I plan an accessible event?](#) [151]

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

- [What additional Cvent products are available for purchase?](#) [150]

## App

- [Does Cvent have an app for event attendees?](#) [152]
  - [What is CrowdCompass?](#) [152]
  - [How far ahead should I plan if I'm going to use CrowdCompass?](#) [152]
  - [How much does CrowdCompass cost?](#) [153]
  - [Is there a way I can offset CrowdCompass costs?](#) [153]
- [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? [154]
- Why do I have to submit my event for approval? [154]
- How do I launch my event? [154]

## Attendee Hub

- Does Cvent have a product to help support virtual or hybrid events? [155]
- What is Virtual Attendee Hub? [155]
- How do I get Attendee Hub and other Cvent add-ons? [150]

## Capacity

- How do I give my event or agenda items a capacity? [156]

## Checklists & Quick Guides

All checklists & quick guides. [78]

- Plan
  - Cvent Build Checklist [157]
  - Event Strategy Checklist [158]
- Test
  - Event Checklist (download) [159]
  - Event Checklist (electronic) [160]
- Event Approval & Launch
  - How-To Request Approval & Launch Event [161]
  - Event Approval Checklist (used by event approvers) [162]
  - What to check before opening registration (from Cvent) [163]
- Fundraising Events
  - Create a fundraising event [164]

## Contacts

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

## CrowdCompass

- What is CrowdCompass? [152]
- Does Cvent have a mobile app to support events? [152]
- How do I get CrowdCompass and other Cvent add-ons? [150]

## Email

## Email Communication

- How can I communicate with past attendees? [165]
- How do I send event and session emails? [166]
- How can I ensure an email was sent and delivered? [167]
- Why wasn't an email delivered? [167]
- If I send an event reminder in Marketing Cloud, how do I exclude those who are already registered? [69]
- How can I use event participation data? [168]

## Email Policies

- How do I send an event invitation through Cvent? [169]
- What event emails are sent through Cvent? [169]
- What is the difference between commercial and transactional communication? [170]
- Does my Cvent email need to have an unsubscribe option? [170]
- Do my Cvent emails need to contain the Cvent footer and privacy policy? [171]
- If a contact is opted out in Cvent, can I opt them back in? [167]

## Email Setup

- How do I add a new event planner email address? [172]\*
- What should my Cvent emails include? [171]
- Does my Cvent email need to have an unsubscribe option? [170]
- Do my Cvent emails need to contain the Cvent footer and privacy policy? [171]

## Event Participants

- What are the different ways to record event participation? [173]
- Why should I bother recording event participation? [174]
- How can I use event participation data? [174]
- How do I access event participation data? [175]
- How do I record event participation data? [176]
- How do I view event participation in Salesforce? [177]
- How can I communicate with past attendees? [165]

## Event Preparation

- What are planner alerts? [178]
- How do I print name badges and invoices in Cvent? [179]
- Can I track who didn't complete registration (abandoned registrants)? [180]

## Financial Information

- What account code should I use? [181]
- What speedtype should I use? [181]

- [What designation code should I use?](#) [182]
- [How do I get an account code, speedtype, or designation code added to Cvent?](#) [47]\*
- [How do I issue a refund?](#) [183]
- [What is PCI compliance?](#) [184]
- [How can I accept credit card information outside Cvent?](#) [184]
- [What are Cvent's credit card fees?](#) [185]
- [How do I create a fundraising event?](#) [182]
- [What test credit card numbers can I use?](#) [186]

## Fundraising

- [How do I create a fundraising event?](#) [182]

## Guests

- [How do I configure my event to collect guest information \(in addition to the primary registrant\)?](#) [187]
- [How can I get event guests added to Salesforce?](#) [188]

## Images

- [What image sizes should I use?](#) [189]
- [Where can I locate great CU photography?](#) [104]
- [Where can I learn more about CU branding?](#) [190]

## 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?](#) [191]

## Invitation Forwarding

- [How do I use invitation forwarding?](#) [192]

## Logging in and Password Help

- [What is our Cvent account name?](#) [106]
- [What is my username?](#) [106]
- [How do I reset my password?](#) [106]

## 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? [184]
- What devices support OnArrival? [42]
- Does OnArrival offer session check-in? [193]
- How can I get OnArrival Premium? [42]
- What is Event in a Box, and how much does it cost? [194]

## Paid Event

- What account code should I use? [181]
- What speedtype should I use? [181]
- What designation code should I use? [164]
- How do I get an account code, speedtype, or designation code added to Cvent? [47]\*
- How do I issue a refund? [183]
- What is PCI compliance? [184]
- How can I accept credit card information outside Cvent? [184]
- What are Cvent's credit card fees? [181]
- How do I create a fundraising event? [164]
- What test credit card numbers can I use? [186]

## Portal (for Reports)

- How can I give someone else at CU access to event Reports (for free)? [195]
- How are Reports managed in the Portal? [196]

## Promote Event

- How do I promote my event? [197]

## Questions

- Adding Event Questions [198]

## Registration Types

- Adding Registration Types [199]

## Reporting

- How do I run Reports for my event? [200]
- What is the portal and how do I get Reports published to it? [195]\*
- How can a stakeholder get access to view Cvent reports in real time? [195]\*
- How do I create a report of events created by one user? [201]\*

- How can I leverage the data available in Cvent to show my event was successful? [202]

## Sharing

- How do I share my event with another user? [203]

## Support

- What kinds of support and resources can I get through Cvent? [147]

## Survey

- Configure Event or Session Survey [204]
- How do I send a survey to my event participants? [204]

## Templates

- Where can I view CU-branded event templates? [205]
- How do I access CU-branded event templates? [206]
- Where can I learn more about CU branding? [190]

## Testing

- How should I test my event? [207]
- Is there a testing checklist that can help me be successful? [141]
- What test credit card numbers can I use? [186]
- Can I send a testing scenario to someone who isn't a Test User? [208]

## Troubleshooting

- What are Cvent's recommended browsers? [209]
- Special Characters in Cvent Event Titles & Payment Processing Issues [210]

## Use

- Should I be a Cvent user? I host one event a year. [211]

## Waitlists

- How do I set up event waitlists? [212]

## Website

- Where do I find my event weblink? [197]

- How do I create a custom URL? [213]
- How do I hide my event from search engines? [214]

## 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]

## Billing

- How is my campus billed for eComm licenses? [215]

## Business Units and Marketing Cloud Permissions

- How do I grant access to a business unit or unit? [216]
- How do I view a user's permissions? [216]
- How do I change a user's permissions? [216]
- What roles and permissions should a user have? [217]
- What roles and permissions should an eComm Specialist have? [217]
- How do I integrate a user with Salesforce? [218]
- How do I request a new business unit? [219]

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

## Checklists & Quick Guides

All checklists & quick guides [78].

- Creating Data Extensions [86]
- Event Approval Checklist (used by eComm specialists) [162]

## Cvent

- How do I approve an event? [220]
- Is there a checklist I should use when approving an event? [141]
- How do I add a new contact type? [47]
- How do I add a new event planner's email address? [172]
- How do I get an account code, speedtype, or designation code added to Cvent? [221]
- How do I reset a user's password? [222]
- What is the Cvent Portal for Reports? [195]
- How do I manage Reports in the Cvent Portal? [196]
- How do I create a test user? [47]
- Can Cvent be integrated with other platforms not supported by eComm? [191]

## Dashboards

- How do I create a dashboard? [31]

## Data Extensions

- How do I build a data extension? [70]
- Data Extension 1-pager [87]
- Can I import CSV data into a data extension? [88]
- How do I unarchive data extensions? [64] (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? [223]

- How do I create a new email preference? [223]

## Onboarding

- What steps are involved in the onboarding process? [224]
- How do I know if a user is a good candidate for an eComm license? [225]
- How do I know what requests are in the queue to be addressed next month? [226]
- How can I check who passed the required post-training quiz? [226]
- What tasks need to be completed if a new user is joining an existing group? [227]

## Password Resets & Permissions

- Marketing Cloud
  - What access should a Marketing Cloud User have? [217]
  - How do I reset a user's password or help them with multi-factor authentication (MFA)? [216]
  - How do I grant access to a business unit or unit? [216]
  - How do I view a user's permissions? [216]
  - How do I change a user's permissions? [216]
  - How do I integrate a user with Salesforce? [218]
- Cvent
  - What access should a Cvent user have? [228]
- General
  - What tasks must a user request from an eComm specialist? [47]
  - Is there a detailed breakdown of roles and responsibilities? [229]
  - What roles and permissions should a user have? [217]
  - What roles and permissions should an eComm Specialist have? [217]

## 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? [110]
- How do you preview/test personalization? [109]

## Public Groups

- What is a public group? [230]
- How do I add users to an existing public group? [230]
- How do I create a new public group? [230]

## Release Notes

- Quarterly Release Notes [148]

## Reports

- How do I build Salesforce reports? [46]
- Check Report Unique Count [231]

## Sender Profiles, Delivery Profiles, and Send Classifications

- How do I create a send classification? [232]
- How do I create a delivery profile? [232]
- What are send classifications, sender profiles, and delivery profiles? [100]
- How do I create a sender profile? [232]
- How do I verify a sender profile? [233]

## Sharing

- How do I share an email? [96]
- How do I share in Salesforce (Campaigns, Reports, and Dashboards)? [14]
- How do I share a Cvent event with another user? [203]

## Subscribers

- What is a subscriber? [22]
- How can I view a subscriber? [127]
- How can I view subscriber status and what do the statuses mean? [127]
- How do I reactivate a subscriber? [127]
- How do I convert a subscriber key to a contact ID? [128]

## Training

- What new user training is offered? [234]
- How are new users notified of training? [226]
- What tasks are users responsible for vs. an eComm specialist? (access levels and how-tos) [229]
- 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? [235]
- New Users
  - How do new users get access? [226]
  - What are my roles and responsibilities when onboarding a new eComm user? [236]
- Marketing Cloud
  - How do I reset a Marketing Cloud password? [216]
  - How do I unlock a user in Marketing Cloud [216]?
  - How do I change a user's password in Marketing Cloud? [216]
  - How do I integrate a Marketing Cloud user with Salesforce? [218]
  - Why can't my user send an email in Marketing Cloud? [237]

- Cvent
  - How do I reset a Cvent password? [238]
- Salesforce
  - How do I reset a Salesforce password? [44]

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[57] <https://www.cu.edu/blog/ecomm-wiki/unsubscribe-details> [58] <https://www.cu.edu/ecomm/request-access> [59] <https://www.cu.edu/ecomm/submit-help-ticket>  
[60] <https://www.youtube.com/watch?v=FptZid3UBo0> [61] <https://www.cu.edu/blog/ecomm-wiki/new-user-training-marketing-cloud-old2> [62] <https://www.cu.edu/blog/ecomm-wiki/marketing-cloud-intermediate-training> [63] <https://www.cu.edu/blog/ecomm-wiki/can-spam-new-user-training>  
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[180] [https://support.cvent.com/apex/CommunityArticle?id=000002460&Lang=en\\_US&searchTerm=abandoned](https://support.cvent.com/apex/CommunityArticle?id=000002460&Lang=en_US&searchTerm=abandoned)  
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