Need 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

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]
- Where can I access Salesforce new user training materials online? [6]
- Where can I complete the short verification quiz? [7]
- Are there additional training opportunities for more advanced Salesforce users? [8]

Campaigns

- What is the difference between a campaign and a report? [9]
- How are campaigns connected to reports? [9]
- 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]*

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? [11]
- 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? [13]*
- 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]

Cvent Integration

- How does the Cvent-Salesforce integration work? [23]
- How can I find my Cvent event in Salesforce? [23]
- How can I get event guests added to Salesforce? [24]
- How can I track event attendees to get the most out of the Cvent-Salesforce integration? [25]

Dashboards

- How do I view a Salesforce dashboard? [26]
- How do I filter a Salesforce dashboard?
- How do I refresh a dashboard to be sure the data is current? [27]
- How do I subscribe to a Salesforce dashboard? [26]
- Why can’t I see a Salesforce dashboard? [14]
- How would I view my Business Unit's email send data via a dashboard?
- I want a dashboard for my email sends like the one on the Salesforce homepage. How do I create one? [28]*

Email Preferences

- How do constituents manage their own email preferences? [29]
- How do I opt a contact out of all emails or specific email preferences? [30]*
- How do I opt a contact back in to all emails or specific email preferences? [30]*
- How do I change the name of an existing email preference? [31]*
- How do I create a new email preference? [31]*

Email Sends

- How do I view email send data in Salesforce? [32]

Events

- How do I locate my Cvent event in Salesforce? [10]
- How do I view event participation in Salesforce? [33]
- Why is my event campaign name so long in Salesforce? [10]

Folders

- How do I share folders and subfolders? [34]*

List Views

- What is a list view and how can it help me? [35]
- How do I create new list view or clone an existing one? [35]
- How do I switch between different list views? [35]
- How do I pin a list view? [35]

Logging In

- What is the login URL for Salesforce? [36]
- How do I reset my Salesforce password? [36]

Reports

- How do I build Salesforce reports? [37]*
- What is the difference between a campaign and a report? [9]
- Why do reports have such complicated names? [10]
- How do I request a new report? [38]
- How do I modify an existing report? [37]*
- What data can I use to build audience reports? [39]
- How do I view a report? [40]
- How do I share a report with another user? [14]*

Troubleshooting

- How do I add a photo to my Salesforce profile? [41]
- Why did a specific person not receive my email? [42]
- Why can’t I see a specific campaign, report, or dashboard? [14]
- I think I found a bug in Salesforce. What should I do? [43]
- 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? [44]

- Why can't I send a Marketing Cloud message? [45]

Unsubscribe

- How do unsubscribes work? [46]
- How can a consituent unsubscribe or subscribe to communications? [46]
- How can a user view a constituents' email preferences? [46]

Users

- How do I request to become an eComm user? [47]

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [48] so we can assist you.

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Training

- What is Marketing Cloud? Where can I get an overview? [4]
- What Marketing Cloud new user training is offered? [49]
- Where can I access Marketing new user training materials online? [50]
- Where can I complete the short verification quiz? [7]
- Are there additional training opportunities for more advanced Marketing Cloud users? [51]

Accessibility

- What should I think about in terms of accessibility? [52]
- How can I ensure my email is accessible? [53]

Audience

- How can I email donors? [54]
- How do I select my audience? [55]
- How can I email my audience using their campus email addresses? [56]
- Why are my audience report names so complicated? [10]
- How do I add a new audience for my communications? [38]*

Automation

- How can I organize my work between Email Studio and Automation Studio? [57]
- How do I schedule a Salesforce Send Email in Automation Studio? [58]
- How do I schedule Data Extension imports in Automation Studio? [59]

Canceling an Email

- How do I cancel a scheduled send? [60]

CAN-SPAM

- What is CAN-SPAM? [61]
- What is the difference between a commercial and transactional email? [62]

Data Extensions

- What is a data extension? [56]
- How do I build a data extension? [56]
- How do I import/refresh a data extension? [56]
- Can I import CSV data into a data extension? [63]*
- How do I delete a data extension? [64]

Email Content

- How can I create an “add to calendar” link in an email? [65]
- Where can I access CU branded templates? [66]
- How do I save an email as a template? [67]
- How do I share an email? [68]*
- How do I create compelling content? [69]

Email From Information

- What are send classifications, sender profiles, and delivery profiles? [70]
- How do I change my email from name? [38]*
- How do I change my email from address? [38]*
- What is the CU Footer for All emails? [29]

Folders

- How can I stay organized in Marketing Cloud? [71]
- How can I organize Salesforce Send Emails? [71]

- How can I organize Data Extensions? [71]
- How can I organize Tracking? [71]

Images

- How should I size my images? [72]
- Where can I locate great CU photography? [73]

Login and Password Help

- How do I change my password? [36]
- What is my user name? [74]

Mobile

- How do I design for mobile? [75]
- How do I correct my top image display in mobile? [76]

Personalization

- How can I add first name and last name data to my Marketing Cloud email? [77]
- How can I add other personalized information to my Marketing Cloud email, such as address? [78]
- How can I add personalized information that is not in Salesforce to my Marketing Cloud email? [78]*
- What if I want to add personalized data where the data tag doesn't already exist in Marketing Cloud? [78]*

Reporting

- How do I use Discover Reports in Marketing Cloud? [79]
- How do I use the Audience Engagement Over Time report? [80]
- How do I use the Best Performing Send Day report? [81]
- How do I use the Deliverability - Complaint Rate report? [82]
- How do I use the Device Performance by Email Sends and Email Performance by Device reports? [83]
- How do I use the Recent Email Send Summary report? [84]
- How do I use the Time Between Send and Engagement report? [85]

Sending an Email

- Can I send to reports and campaigns and data extensions? [86]
- How do I complete a guided send? [87]
- How do I complete a Salesforce send? [88]
- Why do I need an email footer and what should be in it? [89]

- What is throttling and how do I do it? [90]

Scheduling an Email

- What should I consider when scheduling an email? [91]
- Where can I view my scheduled email? [60]

Subject Lines and Preheaders

- How do I choose a subject line? [92]
- What is a preheader? [93]
- Can I add personalized data to the subject line and preheader? [77]
- How do I add an emoji to my subject line or preheader? [94]

Subscribers

- What is a subscriber? [21]
- How can I view a subscriber? [95]
- How can I view subscriber status and what do the statuses mean? [95]
- How do I reactivate a subscriber? [95]*
- How do I convert a subscriber key to a contact ID? [96]

Testing

- How do I send a test email? [97]
- What should I look for in a successful test? [98]
- What is an A/B test and how do I perform one? [99] [100]
- Does the data appear in Salesforce? [100]

Templates

- Can I view CU and UCCS branded templates? [101]
- How can I access CU and UCCS branded templates? [66]

Tracking and Reporting

- Why is tracking important? [102]
- Where can I view tracking information for my email? [103]
- How can I export tracking information for my email? [104]*
- How can I compare the data of different email sends? [104]

Troubleshooting

- My message ended up in a spam folder. How can I prevent this? [105]
- How do I fix a broken link in an email I already sent? [106]

- Are there checklists that can help me do my job better? [107]
- With what browsers is Marketing Cloud compatible? [108]
- Why didn’t a contact receive my email? [42]
- Why can't I send emails from Marketing Cloud? [45]
- I can’t see the audience list I’m sending to. What should I do? [14]

Unsubscribe

- How do unsubscribes work? [46]
- How can a consituent unsubscribe or subscribe to communications? [46]
- How can a user view a constituents' email preferences? [46]

Users

- How do I add a new user or update a license? [109]

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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? [4]
- What Cvent training is available? [49]
- Where can I access on-demand training for Cvent? [110]
- Where can I complete the short verification quiz? [7]
- How can I get Cvent certified? [111]
- Does Cvent offer training and support resources? [112]

Accessibility

- How can I plan an accessible event? [113]

App

- Does Cvent have an app for event attendees? [114]

Approval and Launch

Contacts

Email Communication

Email Policies

Email Setup

Event Participants

- How can I report on event participation in Salesforce? [38]
- How can I communicate with past attendees? [117]

Event Preparation

- What are planner alerts? [129]
- How do I print name badges and invoices in Cvent? [130]
- Can I track who didn't complete registration (abandoned registrants)? [131]

Financial Information

- How and where do I add my event’s financial information? (Cvent Standard) [132]
- What account code should I use? [133]
- What speedtype should I use? [133]
- What allocation code should I use? [134]
- How do I get an account code, speedtype, or allocation code added to Cvent? [38]*
- How do I issue a refund? [135]
- What is PCI compliance? [136]
- How can I accept credit card information outside Cvent? [136]
- What are Cvent’s credit card fees? [137]
- How do I create a fundraising event? [134]
- What test credit card numbers can I use? [138]

Flex

eComm is rolling out Flex in early 2020. All Cvent users will be invited to training sessions to assist with your transition.

- What is Cvent Flex? [139]
- Should I transition to Cvent Flex? [140]
- How should I transition to Cvent Flex? [141]
- What are the available (and unavailable) features in Cvent Flex? [142]
- Where can I see some examples of Cvent Flex events? [143]
- Are CU branded Flex templates available to clone? [144]
- Is there basic training available for Flex? [145]
- Is there advanced training available for Flex? [146]
- What else should I be asking about Flex? [147]
- Are there specific image demensions when using Flex? [148]

Fundraising

- How do I create a fundraising event? [134]

Guests

- How can I get event guests added to Salesforce? [149]

Images

- What image sizes should I use? (Cvent Standard) [150]
- What image sizes should I use? (Cvent Flex) [148]
- Where can I locate great CU photography? [73]
- Where can I learn more about CU branding? [151]

Invitation Forwarding

- How do I use invitation forwarding? [152]

Logging in and Password Help

- What is our Cvent account name? [74]
- What is my user name? [74]
- How do I reset my password? [74]

On-Site Tools and Support

- How can I run check-in at my event? [25]
- What is OnArrival? [25]
- Can I collect credit card payments on-site? [136]
- What devices support OnArrival? [25]
- Does OnArrival offer session check-in? [153]
- How can I get OnArrival Premium? [25]
- What is Event in a Box, and how much does it cost? [154]

Reporting

- How do I run Reports for my event? [155]
- What is a parked report group and how do I create one? [156]*
- How can I give a non-Cvent user access to view registration reports? [156]
- How do I create a report of events created by one user? [157]

Salesforce Integration

- How does the Cvent-Salesforce integration work? [23]
- How can I find my Cvent event in Salesforce? [23]
- How can I get event guests added to Salesforce? [24]
- How can I track event attendees to get the most out of the Cvent-Salesforce integration? [25]

Sharing

- How do I share my event with another user? [158]

Support

- What kinds of support and resources can I get through Cvent? [112]

Survey

- How do I send a survey to my event participants? [159]

Templates

- Where can I find CU-branded event templates? (Cvent Standard) [160]
- Where can I view CU-branded event templates? (Cvent Flex) [144]
- How do I access CU-branded event templates? (Cvent Flex) [161]
- Where can I learn more about CU branding? [151]

Testing

- How should I test my event? [162]
- Is there a testing checklist that can help me be successful? [107]
- How do I create a test user? [38]*
- What test credit card numbers can I use? [138]

Troubleshooting

- What are Cvent's recommended browsers? [163]

Use

- Should I be a Cvent user? I host one event a year. [164]

Waitlists

- How do I set up event waitlists? [165]

Website

- How do I create a custom URL? [166]
- How do I hide my event from search engines? [167]

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [48] so we can assist you.

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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]

Business Units and Marketing Cloud Permissions

- How do I grant access to a business unit or unit? [168]
- How do I view a user’s permissions? [168]
- How do I change a user's permissions? [168]
- What roles and permissions should a user have? [169]
- What roles and permissions should an eComm Specialist have? [169]
- How do I integrate a user with Salesforce? [170]
- How do I request a new business unit? [171]

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]

Contacts

- How do I add contacts to Salesforce? [20]
- How can I match new contacts against existing contacts to avoid creating duplicates? [13]
- How does a Salesforce contact relate to a Marketing Cloud subscriber? [21]
- 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]

Chatter

- How do I post in Chatter? [172]
- How do I set my Chatter notifications? [173]

- Why am I not seeing all of my Chatter posts? [173]

Cvent

- How do I approve an event? [174]
- Is there a checklist I should use when approving an event? [107]
- How do I add a new contact type? [38]
- How do I add a new event planner email address? [124]
- How do I get an account code, speedtype, or allocation code added to Cvent? [124]
- How do I reset a user's password? [175]
- What is a parked report group and how do I create one? [156]
- How do I create a test user? [38]

Dashboards

- How do I create a dashboard? [28]

Data Extensions

- How do I build a data extension? [56]
- Can I import CSV data into a data extension? [63]

Duplicates

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

Email Preferences

- How do I modify a contacts email preferences? [30]
- How do I change the name of an existing email preference? [31]
- How do I create a new email preference? [31]

Onboarding

- What steps are involved in the onboarding process? [176] UPDATED FOR COVID-19
- How do I know if a user is a good candidate for an eComm license? [177]
- What are upcoming training dates? [178]
- How do I know what requests are in the queue to be addressed next month? [179]
- How can I check who is registered for training? [180]
- How can I check who passed the required post-training quiz? [180]
- What tasks need to be complete if a new user is joining an existing group? [181]

Profile Attributes

- How can I add personalized information that is not in Salesforce to my Marketing Cloud email? [78]
- What if I want to add personalized data where the data tag doesn't already exist in Marketing Cloud? [78]

Public Groups

- What is a public group? [182]
- How do I add users to an existing public group? [182]
- How do I create a new public group? [182]

Reports

- How do I build Salesforce reports? [37]

Sender Profiles, Delivery Profiles, and Send Classifications

- How do I create a send classification? [183]
- How do I create a delivery profile? [184]
- What are send classifications, sender profiles, and delivery profiles? [70]
- How do I create a sender profile? [185]
- How do I verify a sender profile? [186]

Sharing

- How do I share an email? [68]

Subscribers

- What is a subscriber? [21]
- How can I view a subscriber? [95]
- How can I view subscriber status and what do the statuses mean? [95]
- How do I reactivate a subscriber? [95]
- How do I convert a subscriber key to a contact ID? [96]

TaskRay

- How do I use TaskRay? [187]

Training

- What new user training is offered? [49]
- Where can I access new user training materials online? [49]
- Where can users complete the short verification quiz? [7]

Users

- All Users
  - Where can I view all of the license holders on my campus? [188]
- New Users
  - What are my roles and responsibilities when onboarding a new eComm user? [176]
- Marketing Cloud
  - How do I reset a Marketing Cloud password? [168]
  - How do I unlock a user in Marketing Cloud [168]?
  - How do I change a user's password in Marketing Cloud? [168]
  - How do I integrate a Marketing Cloud user with Salesforce? [170]
  - Why can't my user send an email in Marketing Cloud? [45]
- Cvent
  - How do I reset a Cvent password? [189]
- Salesforce
  - How do I reset a Salesforce password? [36]

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[3] https://www.cu.edu/ecomm/strategy/leadership
[4] https://www.cu.edu/blog/ecomm-wiki/tool-overview
[5] https://www.cu.edu/blog/ecomm-wiki/salesforce-new-user-training
[6] https://www.cu.edu/blog/ecomm-wiki/new-user-training-salesforce
[7] https://www.cu.edu/ecomm/access-training/post-training-verification
[8] https://www.cu.edu/blog/ecomm-wiki/salesforce-intermediate-training
[9] https://www.cu.edu/blog/ecomm-wiki/salesforce-campaign-vs-salesforce-report
[10] https://www.cu.edu/blog/ecomm-wiki/naming-conventions
[11] https://www.cu.edu/blog/ecomm-wiki/create-salesforce-campaign-and-add-campaign-members
[12] https://www.cu.edu/blog/ecomm-wiki/modify-or-delete-salesforce-campaign
[13] https://www.cu.edu/blog/ecomm-wiki/using-salesforce-apsona
[14] https://www.cu.edu/blog/ecomm-wiki/salesforce-visibility-and-sharing
[15] https://www.youtube.com/watch?v=06N1nEM_KOk&feature=youtu.be
[16] https://www.cu.edu/blog/ecomm-wiki/standard-contacts-vs-individual-contacts
[17] https://www.cu.edu/blog/ecomm-wiki/updating-contact-information-salesforce
[18] https://www.cu.edu/blog/ecomm-wiki/duplicate-contact-records-and-merges
[19] https://www.cu.edu/blog/ecomm-wiki/salesforce-individual-email-results-iers
[20] https://www.cu.edu/blog/ecomm-wiki/adding-and-matching-contacts-apsona
[21] https://www.cu.edu/blog/ecomm-wiki/salesforce-contacts-marketing-cloud-subscribers
[22] https://www.cu.edu/blog/ecomm-wiki/understanding-gdpr
[23] https://www.cu.edu/blog/ecomm-wiki/automatic-cvent-salesforce-integration
[24] https://www.cu.edu/blog/ecomm-wiki/send-cvent-guests-salesforce
[25] https://www.cu.edu/blog/ecomm-wiki/cvent-meet-cvent-check-app
[26] https://www.cu.edu/blog/ecomm-wiki/view-and-subscribe-salesforce-dashboards
[27] https://www.cu.edu/blog/ecomm-wiki/refreshing-dashboard

[28] https://www.cu.edu/blog/ecomm-wiki/creating-dashboard
[29] https://www.cu.edu/blog/ecomm-wiki/constituent-management-email-preferences
[30] https://www.cu.edu/blog/ecomm-wiki/manually-managing-email-preferences
[31] https://www.cu.edu/blog/ecomm-wiki/creating-new-email-preference-category-or-modifying-existing-email-preference
[32] https://www.cu.edu/blog/ecomm-wiki/salesforce-email-send-data
[33] https://www.cu.edu/blog/ecomm-wiki/view-cvent-event-participation-salesforce
[34] https://www.cu.edu/blog/ecomm-wiki/sharing-salesforce-folders-and-subfolders
[35] https://www.cu.edu/blog/ecomm-wiki/salesforce-list-views
[36] https://www.cu.edu/blog/ecomm-wiki/how-login-0
[37] https://www.cu.edu/blog/ecomm-wiki/salesforce-reporting
[38] https://www.cu.edu/blog/ecomm-wiki/add-account
[39] https://www.cu.edu/blog/ecomm-wiki/using-data-build-your-audience
[40] https://www.youtube.com/watch?v=OdYhw7qa3oM&feature=youtu.be
[41] https://www.cu.edu/blog/ecomm-wiki/adding-photo-salesforce-profile
[42] https://www.cu.edu/blog/ecomm-wiki/someone-not-receiving-marketing-cloud-messages
[43] https://www.cu.edu/blog/ecomm-wiki/addressing-salesforce-bugs
[44] https://www.cu.edu/blog/ecomm-wiki/contact-missing-audience-report
[45] https://www.cu.edu/blog/ecomm-wiki/unable-send-email-marketing-cloud
[46] https://www.cu.edu/blog/ecomm-wiki/unsubscribe-details
[47] https://www.cu.edu/ecomm/request-access
[48] https://www.cu.edu/ecomm/submit-help-ticket
[49] https://www.cu.edu/ecomm/access-training/new-user-training
[50] https://www.cu.edu/blog/ecomm-wiki/new-user-training-marketing-cloud
[51] https://www.cu.edu/blog/ecomm-wiki/marketing-cloud-intermediate-training
[52] https://www.cu.edu/blog/ecomm-wiki/consider-accessibility
[53] https://www.cu.edu/blog/ecomm-wiki/4-strategies-creating-accessible-content
[54] https://www.cu.edu/blog/ecomm-wiki/emailing-donors-ecomm
[55] https://www.cu.edu/blog/ecomm-wiki/tips-tricks-selecting-your-audience
[56] https://www.cu.edu/blog/ecomm-wiki/marketing-cloud-data-extension
[57] https://www.cu.edu/blog/ecomm-wiki/organizing-your-work-ongoing-automation-studio-sends
[58] https://www.cu.edu/blog/ecomm-wiki/scheduling-salesforce-send-emails-automation-studio
[59] https://www.cu.edu/blog/ecomm-wiki/scheduling-data-extension-imports-automation-studio
[60] https://www.cu.edu/blog/ecomm-wiki/marketing-cloud-view-scheduled-email-and-cancel-send
[61] https://www.cu.edu/blog/ecomm-wiki/new-user-training-intro
[62] https://www.cu.edu/blog/ecomm-wiki/commercial-vs-transactional-whats-difference
[63] https://www.cu.edu/blog/ecomm-wiki/import-csv-file-data-extension
[64] https://www.cu.edu/blog/ecomm-wiki/deleting-data-extension
[65] https://www.cu.edu/blog/ecomm-wiki/creating-add-calendar-link-marketing-cloud-email
[66] https://www.cu.edu/blog/ecomm-wiki/cu-and-uccs-branded-templates
[67] https://www.cu.edu/blog/ecomm-wiki/marketing-cloud-save-existing-email-template
[68] https://www.cu.edu/blog/ecomm-wiki/marketing-cloud-sharing-email
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