

## Preferred Name Rollout for eComm Specialists <sup>[1]</sup>

August 11, 2022 by [Melanie Jones](#) <sup>[2]</sup>

After ensuring that preferred name personalization is possible <sup>[3]</sup> given your population, Reports and Data Extensions need to be created (or updated) by an eComm specialist to contain the appropriate preferred name field in Salesforce.

### Reports

Based on the population you are reporting <sup>[4]</sup> on, you'll need to use the respective preferred name field. For example, use:

- **'Student Preferred Name'** from Campus Solutions (CS) for students.
- **'Employee Preferred Name'** from Human Capital Management (HCM) for employees.
- **'Alumni/Donor Preferred Name'** which comes from Advance/Ascend for alumni and donors.

Student Preferred Name ▼	Employee Preferred Name ▼	Alumni/Donor Preferred Name ▼
Miles	Robert	Miles
Robb	Robert	Robert
Rudy	Robert	Robert
Sebastian	Robert	Robert
Rob	Robert	Robert

**NOTE** Prior to Sept. 11, 2022 the 'First Name' field can be used reliably for personalizing student communication. Beginning on Sept. 12, the 'First Name' field should be replaced by 'Student Preferred Name'. The 'First Name' field's logic and label will be updated to 'Legal First Name', which is not encouraged for personalization but can be seen in Salesforce when viewing a Contact.

**NOTE** All three of these preferred names live on the Contact object in Salesforce. They can all be pulled into Reports but cannot be viewed on the Contact.

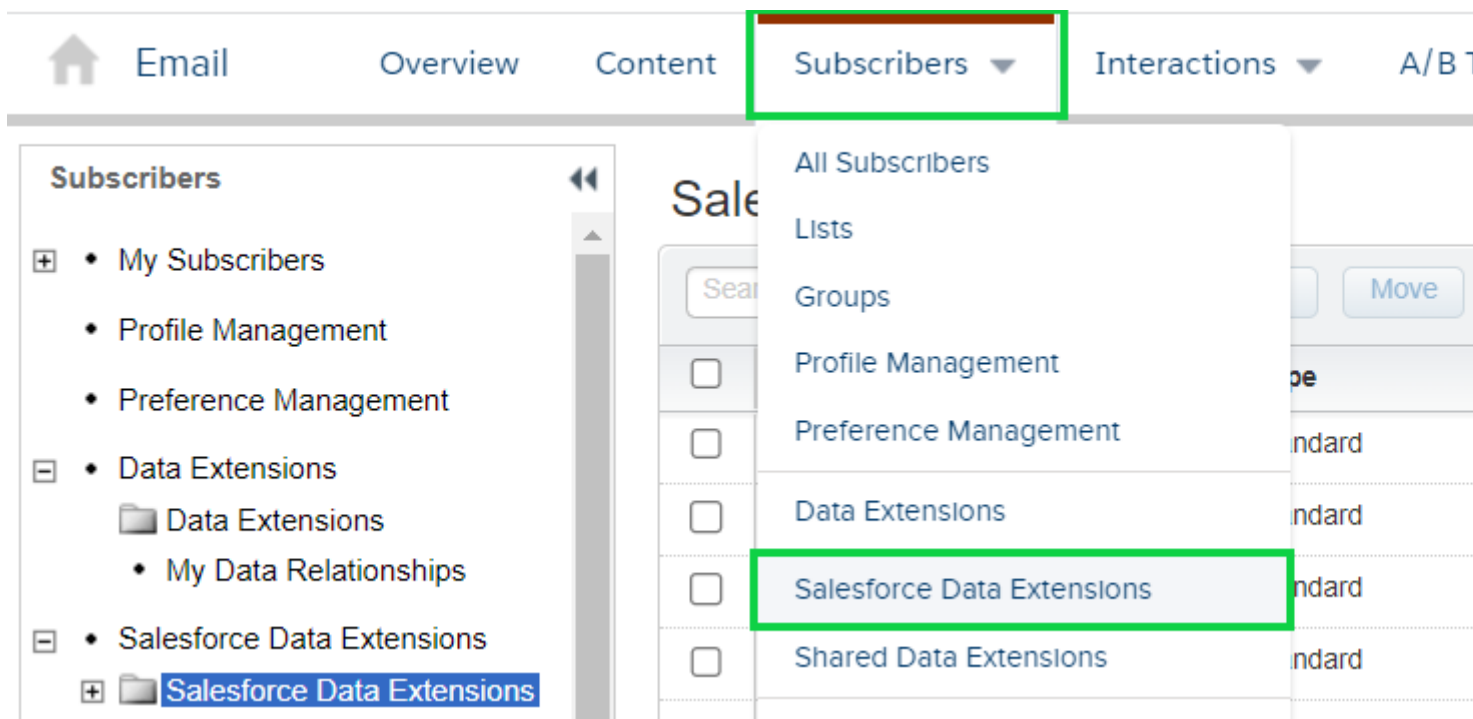
## Data Extensions

For personalization to work, the field being used must exist in the Data Extension. You can update existing Data Extensions or create new ones (and delete old ones).

- Update Data Extension
- Create New Data Extension

A Data Extension that already exists can be modified to remove the existing *First Name* field and add the new *Preferred Name* field. To do so:

- Hover **Subscribers** and select **Salesforce Data Extensions** in the dropdown. Open your Data Extension by clicking on the name.



### Delete Existing Data

If the Data Extension contains data, you'll need to delete the records before adding new fields.

- Navigate to the **Records** tab and select the blue **Clear Data** button. Click **OK** in the pop-up to confirm this action.

[Email](#)[Overview](#)[Content](#)[Subscribers ▼](#)[Interactions ▼](#)[A/B T](#)

Salesforce Data Extensions > 008 UREL Mel Jones TEST

✓ Available

[Properties](#)[Records](#)[Track](#)[Export](#)[Import](#)

Contact ID	First Name	Last Name	Email
003f400000mJOpFAAW	Mel	Jones	melanie.jones@cu.edu

#### Add & Remove Fields

- Go back to the first **Properties tab**. Select **Edit Fields**.

Navigation: [Home](#) [Email](#) [Overview](#) [Content](#) [Subscribers](#) [Interactions](#) [A/B Test](#)

Salesforce Data Extensions > 008 UREL Mel Jones TEST

008 UREL Mel Jones TEST ✓ Available


**Properties** [Records](#) [Track](#)

EXTERNAL KEY [?](#)

008 UREL Mel Jones TEST\_0

Created Date	Last Modified Date
Thursday, August 11, 2022 11:54 AM by Melanie Jones	Thursday, August 11, 2022 11:54 AM by Melanie Jones

LOCATION

 Salesforce Data Extensions [Change](#)

Type:

Standard

USED FOR SENDING	USED FOR TESTING
Yes	Yes

SUBSCRIBER RELATIONSHIP

Contact ID relates to Subscribers on Subscriber Key

- Click the **minus icon** to remove the *First Name* field
- To add a field, select the **Plus icon**.

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Salesforce Data Extensions > 008 UREL Mel Jones TEST

008 UREL Mel Jones TEST ✓ Available


[Properties](#)
[Records](#)
[Track](#)

EXTERNAL KEY [?](#)

008 UREL Mel Jones TEST\_0

Created Date	Last Modified Date
Thursday, August 11, 2022 11:54 AM	Thursday, August 11, 2022 12:05 PM
by Melanie Jones	by Melanie Jones

LOCATION

 Salesforce Data Extensions [Change](#)

Type:


Standard

USED FOR SENDING	USED FOR TESTING
Yes	Yes

SUBSCRIBER RELATIONSHIP

Contact ID relates to Subscribers on Subscriber Key

- Add the new *Preferred Name* field exactly as it is labeled in Salesforce.
  - 'Student Preferred Name' for students.
  - 'Employee Preferred Name' for employees.
  - 'Alumni\_Donor Preferred Name' for alumni and donors.
- Click **Save Fields**.

 [Email](#)

[Overview](#)

[Content](#)

[Subscribers](#) ▼

[Interactions](#) ▼

[A/B T](#)

Salesforce Data Extensions > 008 UREL Mel Jones TEST


008 UREL Mel Jones TEST

✓ Available

Properties

Records

Track

EXTERNAL KEY 

008 UREL Mel Jones TEST\_0

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USED FOR SENDING

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USED FOR TESTING

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**IMPORTANT** Incorrectly named fields will not match correctly, resulting in a Data Extension failing to run.

### Create New Data Extension [5]

The same preferred name used in the Report should be included in the Data Extension to make personalizing possible.

## Delete Previous Data Extension <sup>[6]</sup>

### Related Content

- [Salesforce Reporting](#) <sup>[4]</sup>
- [What is the difference between a campaign and a report?](#) <sup>[7]</sup>
- [How are campaigns connected to reports?](#) <sup>[7]</sup>
- [Why do campaigns have such complicated names?](#) <sup>[8]</sup>
- [How do I create a Salesforce campaign?](#) <sup>[9]</sup>
- [How do I modify or delete a campaign?](#) <sup>[10]</sup>
- [How do I add an individual contact to a Salesforce campaign?](#) <sup>[9]</sup>
- [Why can't I see a certain campaign?](#) <sup>[11]</sup>
- [How do I share a campaign with another user?](#) <sup>[11]</sup>
- [How do I share a campaign with a public group?](#) <sup>[11]</sup>

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[5] <https://www.cu.edu/doc/data-extension-1-pager20171107pdf> [6] <https://www.cu.edu/blog/ecommerce-wiki/deleting-data-extension> [7] <https://www.cu.edu/blog/ecommerce-wiki/salesforce-campaign-vs-salesforce-report> [8] <https://www.cu.edu/blog/ecommerce-wiki/naming-conventions> [9] <https://www.cu.edu/blog/ecommerce-wiki/create-salesforce-campaign-and-add-campaign-members> [10] <https://www.cu.edu/blog/ecommerce-wiki/modify-or-delete-salesforce-campaign> [11] <https://www.cu.edu/blog/ecommerce-wiki/salesforce-visibility-and-sharing>