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Standard Contacts vs. Individual Contacts [1]

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eComm's Salesforce org contains two types of contact record: individual contact records and standard contact records. Knowing the difference between each can help you understand how a contact was created and where the data associated with it is populating.

Individual Contacts

Individual contacts are the backbone of Salesforce data. These contacts are populated in Salesforce from one of eComm's source systems [3] (HCM, IDM, Ascend, and Campus Solutions). These contacts enter CU People or CUP (formerly Master Data Management or MDM) where they are de-duplicated and updated with the most current information before being sent to Salesforce.

Individual contacts come from CU source systems ONLY; they are created by the UIS Integration Agent. Therefore, the data in them isn't editable in Salesforce. Changes must be requested through the source system in which the data is housed.

The bulk of standard contacts are individuals who have a documented relationship with CU. These contacts typically include students, faculty, staff, retirees, parents, donors, and alumni). When viewing an individual contact, you'll notice that each one typically contains extensive data on the individual from the types of affiliations they have with CU to their education, employment, enrollment, and more.

Standard Contacts

Given the audiences mentioned above, you might have been wondering about contacts who don't have a documented relationship with CU or who wouldn't be captured in source system data. Good examples of individuals in these categories are local business leaders, elected officials, friends of the university, etc.

There are two ways that standard contacts are added to Salesforce.

1. **They are created by an eComm Specialist**. (Learn how [4])

If you are attempting to email an individual who does not have a contact record in Salesforce, your eComm Specialist can create a new contact record for you as long as you provide the minimum required information: first name, last name, and email address. These contacts generally have a limited amount of data associated with them when compared to an individual contact record.

2. **They are created from an event registration in Cvent.**

Each time an individual registers for an event in Cvent and provides an email address, the Cvent Integration Agent creates a standard contact for that person in Salesforce. Since many Cvent registrants are already in Salesforce as individual contacts, a nightly match job identifies a matching individual contact record (if possible) and automatically merges the standard contact and the individual contact so that the event registration information is captured as part of the contact record.

Contact Updates

Maintaining accurate contact information for our constitutents is a shared responsibility of all eComm users. If you are looking to update information on a contact record, please see how to do so here [5].

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- How do I modify information on a contact (such as the email address)? [5]
- Why are there duplicate contact records? [7]
- How to I merge two or more contacts? [7]
- How do I add a contact to a Salesforce campaign? [8]
- What are individual email results (IERs) and how can I use them? [9]
- How do I add contacts to Salesforce? [10]
- How can I match new contacts against existing contacts to avoid creating duplicates? [4]
- How will I know if a contact received my email? [9]
- How does a Salesforce contact relate to a Marketing Cloud Subscriber? [11]
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