

## **Tool Overview** <sup>[1]</sup>

June 3, 2024 by [Melanie Jones](#) <sup>[2]</sup>

**Not sure what can be accomplished with the suite of tools?** Watch product demos and learn about the most common features used at CU by expanding the items below. If you are interested in a more in-depth understanding of how the three tools integrate with each other, [our 10 min. overview might be of use](#) <sup>[3]</sup>.

### **Salesforce for Data**

eComm uses Salesforce to house [constituent data](#) <sup>[4]</sup>. Check out the [1-pager below summarizing the most frequently used items](#) <sup>[5]</sup>. Already licensed? Follow along with our [Salesforce training for new users](#) <sup>[6]</sup> to learn how to navigate the tools.

# SALESFORCE

ACCESS CONTACTS, REPORTS, CAMPAIGNS AND EMAIL SENDS

## SEARCH & CHATTER



### GLOBAL SEARCH

When you search, you'll get relevant results quickly which makes finding the information you are looking for easy.



### CHATTER

Features such as feeds, profiles and groups are a great way to share information, collaborate, and keep up with the latest data updates at CU.

## CONTACTS & RELATED LISTS



### CONTACTS

A contact reflects a unique individual. There are about 1.5 million contacts with email addresses in CU's Salesforce instance.



### RELATED LISTS or OBJECTS

Objects - or related lists in Salesforce - allow you to view a contact's data including email sends, education, interests, employment, affiliations and more.

## REPORTS & CAMPAIGNS



### REPORTS

Reports offer an efficient way to continually engage a dynamic audience based on data housed in Salesforce. That's because they update automatically based on source system data.



### CAMPAIGNS

Campaigns act as a container to hold a group of contacts who can't be captured with a report. These often include uploaded lists (with system ID) or event invitations.

## INDIVIDUAL EMAIL RESULTS & EMAIL SENDS



### INDIVIDUAL EMAIL RESULTS

Individual email results (IERs) provide information about a single email sent to an individual and how that person responded to it.



### EMAIL SENDS

You can view Email Send Reports in Salesforce that reflect statistics and tracking information from your Marketing Cloud email.

[5]

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## Marketing Cloud for Emails

eComm leverages Email Studio and Content Builder within Marketing Cloud. Check out a 1-pager summarizing the most frequently used features [8] below. **Already have a license?**

Follow along with our [Marketing Cloud training for new users](#) <sup>[9]</sup> to learn how to clone a pre-existing [CU branded template](#) <sup>[10]</sup> to customize as needed.

# MARKETING CLOUD | CONTENT BUILDER

DESIGN AND SEND YOUR COMMUNICATIONS

## FOLDER STRUCTURE & UPLOAD ASSETS



### FOLDER STRUCTURE

Create a folder structure that works for you and your team to help stay organized.



### ASSET LOCATION

Save all assets — images, content areas, templates, and emails — in the folder that makes sense to you.

## SEARCH & FILTER FUNCTIONS



### SEARCH

Search for an asset by name, within a specific folder, or across all content.



### FILTER

Filter based on content type or drill down further to find a specific type of content block, such as text or an image.

## TEMPLATES & CONTENT BLOCKS



### TEMPLATES

Access and reuse:

- 20 basic templates
- 6 empty templates
- 14 themed templates
- Saved (custom) templates



### CONTENT BLOCKS

An area of an email where you can insert text, links, images, and buttons. You design the layout and input the content of each individual content box.

## DRAG-AND-DROP CONTENT AREAS



### DRAG-AND-DROP

Entire content blocks can be rearranged simply by dragging and dropping into the desired area of the email, making rearranging content easy.



### SAVE & REUSE

Save content areas that you will use over and over again, such as your department footer or social media links.



### CUSTOMIZE

Create a custom message, newsletter, or invitation that works for you and your



### PASTE HTML

Create emails with HTML so you can copy code and paste it into Marketing Cloud to distribute.

[11]

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## **Cvent for Events**

Cvent is eComm's event management application that supports simple (Express) events or complex ones (Flex). Check out a 1-pager summarizing Cvent's most frequently used items [12] below. Are you already licensed? Follow along with our Cvent training for new users [13] to learn how to clone a pre-existing CU-branded template [14] to customize as needed.

MANAGE YOUR EV  
WEBSITE, POST-RE

HELP, TR



[12]

Download [12]???

## Related Wikis

- [Add to Account](#) [15]
- [Submit Help Ticket](#) [16]
- [Tool and Data Model](#) [4]
- [New User Training | Marketing Cloud](#) [9]
- [New User Training | Cvent](#) [13]
- [New User Training | Salesforce](#) [6]



[Cvent\\_Overview\\_2024.pdf](#) [17]

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