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# Integrated Online Services (IOS) Help Ticket [1]

Team leaders meet twice per week to respond to incoming requests. When specifying a desired delivery date, please allow for a general delivery time of ten business days as a starting point. We will contact you to discuss the specific timeline associated with your request.

***If your ticket contains more than four (4) files, then please email us at crmhelp@cu.edu*** *[2]*

**How can we help? ***

- Select -

## List Upload Prerequisites

Please follow these steps to submit a list of contacts for upload to the IOS Salesforce.

1. Download this template [3] to understand the data needed and the desired formatting. **All columns on this list are required**. Please include any additional fields on the contact record you would like included in your upload.
2. Discuss internally if you want the Collegis call center to contact this list (populate Column M with TRUE/FALSE).
3. Review our Lead Source Attributions [4] and select a value for both Source Channel and Lead Source to include with your list.
4. Find or Create a campaign [5]to add your contacts to when they are uploaded.

**Desired Delivery Date or Launch Date ***

Month Day

Please allow for a general delivery time of ten business days as a starting point. If your request is urgent, please specify the urgency in the prioritization dropdown below.

**How should we prioritize this request? ***

- Select -

**Technical Support ***

- Select -

### Getting Salesforce Access

- Learn more about the three steps required to get access to Salesforce [6], including:
  - ?Pre-Access Requirements
  - New User Training
  - Quiz & Request Access

**Program Request** *

- Select -

You may have the opportunity to include numerous specializations under the same program in a single request. All included specializations must require the same type of request (add or modify or delete).

**Please provide the program page URL** * online.cu.edu

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# Program Information

**Program Name:** * **Program Name SIS Code (Plan):** ○ Remove all Specializations of this Program

○ Remove some Specializations of this Program

**Specialization:** **Specializ**
(track/minor/major)

**Include another specialization?** * ○ Yes

**Specialization:** **Specialization SIS Code (SubPlan):** **Include another specialization?** * ○ Yes

(track/minor/major)

**Specialization:** **Specialization SIS Code (SubPlan):** **Include another specialization?** * ○ Yes

(track/minor/major)

**Specialization:** **Specialization SIS Code (SubPlan):** **Include another specialization?** * ○ Yes ◉ No
(track/minor/major)

**Specialization:** **Specialization SIS Code (SubPlan):**

(track/minor/major)

## Standard Process When Adding New Program

### New Program Questionaire

After submitting your request for a new IOS program, you'll need to complete a questionaire pulling together a number of resources about your program [7]. This information will be used to create the program page on the IOS website (*online.cu.edu*) as well as any additional marketing assets.

## Standard Process When Deleting Program

- **IOS will remove the program page and, if applicable, any associated landing pages** from *online.cu.edu*. This includes references to the program in RFI form selection options and the “Find My Program” feature on the site.
- Separately, **you will need to take steps to discontinue or modify any paid campaign activity**, including AdWords, social media activity and other outlets making references to the program. Historical data for the program will still be available, however, no new data will be collected.

**Do you need Marketing or Web Support?** * - Select -
Web support entails content housed on online.cu.edu (not campus sites).

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**Marketing & Web Support**
☐ Copywriting Support
☐ Email Marketing / Drip Campaign / Journey
☐ Graphic Design / Brand
☐ Paid Media Support / Landing Page
☐ Social Media
☐ Strategy Consulting

☐ RFI Auto-responder Email

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## Login Help

- Navigate to https://cuonline.my.salesforce.com/ [8]
- Click **Log in with CU Single Sign On?**
- **Use your campus credentials** to login.
  - This is the same username and password you use to login to your CU email, computer, or the employee portal.?
- Full Login Instructions [9]

**Locked out?** Contact your campus IT help desk [10].

**Tell us more. Details help, so please be as specific as you can.**

**Upload a File**

Choose a file Upload

Files must be less than **2 MB**.
Allowed file types: **gif jpg jpeg png pdf doc docx ppt pptx xls xlsx**.

**Upload a Second File**

Choose a file Upload

Files must be less than **2 MB**.
Allowed file types: **gif jpg jpeg png pdf doc docx**

**Additional Files**

○ Upload More Files (4 total)

◉ Files Provided Complete

**Upload a Third File**

Choose a

Choose a file Upload

Files must be less than **2 MB**.
Allowed file types: **gif jpg jpeg png pdf doc docx ppt pptx xls xlsx**.

**Upload a Forth File**

Choose a file Upload

Files must be less than **2 MB**.
Allowed file types: **gif jpg jpeg png pdf doc docx**

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# Contact Information

**Campus** *

- Select -

**School/College/Unit** *

**Requester First and Last Name** *

**Requester Email** *

**Who else needs to be included in these discussions?**

Provide email addresses for everyone on your team that should be included in follow-up emails or meetings, separated by commas.

CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Submit

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**Source URL:**https://www.cu.edu/crm/forms/integrated-online-services-ios-help-ticket

**Links**
[1] https://www.cu.edu/crm/forms/integrated-online-services-ios-help-ticket [2] mailto:crmhelp@cu.edu [3] https://www.cu.edu/doc/list-upload-template-v2xlsx?download=true [4] https://www.cu.edu/blog/integrated-online-services/ios-lead-attributions [5] https://www.cu.edu/blog/integrated-online-services/create-or-update-salesforce-campaigns [6] https://www.cu.edu/blog/integrated-online-services/getting-salesforce-access [7] https://www.cu.edu/sites/default/files/CU%20Online%20Program%20Discovery%202023.pdf [8] https://cuonline.my.salesforce.com/ [9] https://www.cu.edu/blog/integrated-online-services/salesforce-login [10] https://www.cu.edu/sites/default/files/2015_CampusITHelpDesks.pdf