# Salesforce Implementation FAQs [1]



## Salesforce Functionality

**Q: What are the benefits of Salesforce, including the data it will store and how it will connect that data to other University data systems, such as CU-SIS.**
A: CU's master data sources: student/parent, faculty/staff and alumni/donor databases will feed Salesforce. Advance, the alumni/donor database will share information bi-directionally. The student/parent and faculty/staff sources systems will feed unidirectionally (source system to Salesforce), which is to ensure system of record information is always up-to-date in Salesforce and to support CU's internal communications imperatives.

**Q: I would like to distinguish between industry contacts and student contacts, as well as have members of our team be able to access and update the networked files.**
A: Yes we will be able to distinguish between types of contacts. Users will be able to update contact information for external constituents, like alumni and friends.

**Q: I upload those non-CU email addresses for each newsletter distribution from an Excel sheet I maintain.**
A: Part of why we have selected Salesforce, is that we want a 360 degree view of all of our constituents. If you continue to maintain a spreadsheet outside of Salesforce, we fail to meet that objective. Let us help you process your spreadsheets so your people are flagged in Salesforce.

**Q: Can individual units be able to conduct data analysis on their student community,**

**e.g., GPA, grad rates by year group, etc.?**
A: Yes, provided the unit has the appropriate data permissions to do so per University policy. Note that limited data is stored in Salesforce. An appropriate data source for analysis is the data warehouse.

**Q: Will students be able to upload materials to their SalesForce account, e.g., reflection papers, internship summaries, etc.?**
A: There is the technical capability to do so though there are no current requirements requesting these types of uploads stored in Salesforce.

**Q: We email a lot of people who are not affiliated with CU as a whole, just our office and services. Is there a way to opt them out of all other emails, except for ours?**
A: Salesforce is smart enough to know this. People will receive information based on who they are. If they are in the database and their only affiliation is with Program XYZ, then they will only receive communications from that unit, but may receive communications on a broad campus or systemwide level, but only if it makes sense.

**Q: Will list servers be replaced by Salesforce?**
A: By way of moving away from static lists, CU gets closer to its goal of 360 degree of its constituents. This will take time. Your eComm team will provide resources to help process your lists.

**Q: You mentioned communicating to constituents as CU-related folks. Will I still be able to send our newsletter to non-CU email addresses as most of our readers are in the Aerospace community, not CU alum/employees/students.**
A: Yes. You will still be able to send to email lists that include individuals who are not in the Salesforce database. However, we will still encourage you to use the database as much as possible as there are (un)subscribe implications associated with upload email lists, which gets us into CAN-SPAM compliance. For example when an email list is used, Salesforce doesn't know which record to attach preference information to. So, if someone unsubscribes, their record in Salesforce is not updated. It will recognize the email address the next time an email list is used and that address is included. We will have list processes in place to help transition your "lists" into the Salesforce database.

**Q: Can we use this tool to manage contacts and send emails to groups? Can we use it to set up files for each of our students to track their information?**
A: We can use the tool to manage contacts and send emails to groups as they pertain to eComm and CU. Campus Solutions will still be the source system for all Student related data.

**Q: What are the differences and additions between Harris Connect and Salesforce/ExactTarget(SF/ET)?**
A: There are several differences bw Harris and SF/ET. Salesforce is enterprise wide and includes source system (eg; Advance, CU-SIS and HRMS) integrations, ability to manage multiple data sets and provides a more holistic view of our constituents, therefore supporting more strategic and targeted engagment. The ExactTarget email marketing tool will provide features such as drip campaigns and journey builder, which Harris Connect does not offer.

**Q: Will we have to recreate the email graphic(s) that we store in Harris, copy and reuse each time we send a newsletter?**
A: We are working with Harris on bulk loads from Harris' File Library. We will not be able to upload all of those graphics to Salesforce. But, we will make them available to you so you can

get them on a one-off basis and upload them to your new Salesforce ExactTarget account as needed.

Oracle/PeopleSoft CRM Integration

---

### Q: How does this product fit with other CRM tools used by CU, especially the Oracle CRM product which was part of the CU CU-SIS project?

A: The Oracle/PeopleSoft CRM product will continue to be supported and enhanced while strategically aligning with the Salesforce CRM initiative.

Helpdesk & User Support

---

MyCUHub [2] allows the university to coordinate and integrate the many different interactions that an individual has with the university over their entire lifetime.

### Q: If we have questions for our eComm Manager, will we be limited to go through the help desk or can we contact them directly with quick questions?

A: Yes. You can still contact them directly.

**Q: Will individual units be able to customize any aspect of the Salesforce, e.g., create unique data collection fields?  We are interested in having the ability to customize.**

A: Please forward your requests for additions/changes will need to go through your IT help desk support or your campus CRM analyst.

Database Management

---

### Q: How will record duplication be managed and by whom. How will systems of record be updated? Will MDM (Master Database Management) be applied to managing the "golden" record of contact and relationship housed in eCOMM?

A: MDM will be used to pass only the best data we have for a person through to Salesforce and to allow us (someday) to potentially bring information back from Salesforce to other systems in managed, policy driven ways. In this phase only the Advance system is considering accepting data back from Salesforce through MDM, but other systems may wish to do so in the future.  This is why MDM is a core the architecture so that these decisions can be made (and enforced by technical configuration) as appropriate for each system.

Duplicate record management will follow the existing processes in each of the source systems.  What will become increasingly important will be to have focus on managing duplicates across systems.  As we roll MDM out further we'll be starting discussions with the appropriate data governance groups to determine CU's process for managing these cross-system duplicates and to provide further tuning for the "auto-matching" of some records using the sophisticated match software included in MDM.

**Q: To what level will individual units be able to access and add to individual student data?**
A: Campus Solutions is system of record and will populate Salesforce. Users will not be able to update student records to ensure they are maintained with contact of record information.

### Q: Will students be able to opt out of ALL emails?
A: If the communication is "essential" to their role as a student (eg; class registration, snow closures, etc.), then they will not be able to unsubscribe. If it is otherwise, they will be able to identify their email preferences.

Harris Archive Project (HAP)

---

### Q: Will the emails and registration pages that we have already built in Harris be transferred to our new accounts? Will we still be able to duplicate those emails and reg pages for future use?
A: No. They will not be transferred. Because they are two very different tools/softwares, there's no way to "migrate" emails or forms from Harris to Salesforce. However, we can recreate them in Salesforce. We will also have templates that you can use to help start fresh and utilize the cool, new features that Salesforce offers.

**Q: Since the queries won't be transferred over, will the eComm Managers be copying current queries and creating them in the new system or will this be up to the users to re-create?**
A: It will be up to the users to identify which queries to re-create. The eComm managers will help recreate them in Salesforce.

**Q: Will any email communications that we have created still be accessed for archival purposes (via a link perhaps)?**
A: No. It will be up to users to archive their Harris emails and forms. Your eComm team will communicate more soon about the Harris Archive Project (HAP) to help your efforts.

## Timeline & Logistics

---

**Q: When will the new platform be available for setting up registration and when/how will we be able to take credit card payments.**
A: Summer 2015

**Q: When can we access the new Credit Card portal, and when will we be able to begin accepting payments?**
A: Summer 2015

### Q: What is the date of the Harris hard stop?
A: November 2015

### Q: When will training be?
A: Training for standard users is scheduled to begin early June. Super Users will have access and training before then.

**Groups audience:**
eComm

**Source URL:**https://www.cu.edu/ecomm/salesforce-implementation-faqs

**Links**
[1] https://www.cu.edu/ecomm/salesforce-implementation-faqs [2] https://www.colorado.edu/mycuhub/