

Need eComm Help? Start Here. ^[1]



November 4, 2019 by [jennifer.mortensen](#) ^[2]

Click on the name of the tab below that matches the eComm category with which you require assistance:

- [Salesforce](#)
- [Marketing Cloud](#)
- [Cvent](#)
- [eComm Specialists / Super Users](#)

Now, click the + symbol next to the category that best describes your question to view available resources.

Note that items followed by a * can only be completed with the help of your eComm Specialist ^[3].

Training

- [What is Salesforce? Where can I get an overview?](#) ^[4]
- [What Salesforce new user training is offered?](#) ^[5]
- [Quarterly Release Notes](#) ^[6]
- **[2023 Preference and Business Unit Optimization](#)** ^[7]

Campaigns

- [What is the difference between a campaign and a report?](#) ^[8]
- [What is the relationship between campaigns, reports, and data extensions?](#) ^[9]
- [How are campaigns connected to reports?](#) ^[8]
- [Why do campaigns have such complicated names?](#) ^[10]
- [How do I create a Salesforce campaign?](#) ^[11]
- [How do I modify or delete a campaign?](#) ^[12]
- [How do I add an individual contact to a Salesforce campaign?](#) ^[11]
- [How do I add contacts to a Salesforce campaign in bulk?](#) ^{[13]*}
- [Why can't I see a certain campaign?](#) ^[14]

- How do I share a campaign with another user? ^[14]*
- How do I share a campaign with a public group? ^[14]*

Chatter

- How do I post in Chatter? ^[15]
- How do I set my Chatter notifications? ^[15]
- Why am I not seeing all of my Chatter posts? ^[15]

Contacts

- How do I view a contact? ^[16]
- What is the difference between a Standard Contact and an Individual Contact? ^[17]
- How do I modify information on a contact (such as the email address)? ^[18]
- Why are there duplicate contact records? ^[19]
- How do I merge two or more contacts? ^[19]*
- How do I add a contact to a Salesforce campaign? ^[11]
- What are individual email results (IERs) and how can I use them? ^[20]
- How do I add contacts to Salesforce? ^[21]*
- How can I match new contacts against existing contacts to avoid creating duplicates? ^[13]*
- How will I know if a contact received my email? ^[20]
- How does a Salesforce contact relate to a Marketing Cloud Subscriber? ^[22]
- Is Salesforce GDPR compliant? ^[23]
- Understanding FERPA Flags ^[24]

Data

- What is eComm's data model? ^[25]
- What contacts exist in Salesforce? ^[25]
- Does Salesforce integrate with other CU data sources? ^[25]
- Is there an Entity Relationship Diagram(ERD)? ^[26]
- Is there a data dictionary? ^[27]
- Understanding FERPA Flags ^[24]
- Understanding Preferred Name ^[28]
- GeoCode Sunetting in 2023 ^[29]

Dashboards

- How would I view my Business Unit's email send data via a dashboard? ^[30]
- I want a dashboard for my email sends like the one on the Salesforce homepage. How do I create one? ^[31]*
- How do I view a Salesforce dashboard? ^[30]
- How do I filter a Salesforce dashboard? ^[30]
- How do I refresh a dashboard to be sure the data is current? ^[30]
- How do I subscribe to a Salesforce dashboard? ^[30]
- Why can't I see a Salesforce dashboard? ^[14]

Email Preferences

- How do constituents manage their own email preferences? [32]
- How do I opt a contact out of all emails or specific email preferences? [33]*
- How do I opt a contact back in to all emails or specific email preferences? [33]*
- How do I change the name of an existing email preference? [34]*
- How do I create a new email preference? [34]*
- How do I respect a constituent's email preferences? [35]
- How do eComm specialists respect a constituent's email preferences? [36]*

Email Sends

- How do I view email send data in Salesforce? [37]

Events

- How do I locate my Cvent event in Salesforce? [10]
- How do I view event participation in Salesforce? [38]
- Why is my event campaign name so long in Salesforce? [10]

Folders

- How do I share folders and subfolders? [39]*

Integrations

- How are Marketing Cloud, Cvent and Salesforce integrated with one another? [25]
- How are CU's data sources integrated with Salesforce? [25]
- How does the Cvent-Salesforce integration work? [40]
- How can I find my Cvent event in Salesforce? [40]
- How can I get event guests added to Salesforce? [41]
- How can I track event attendees to get the most out of the Cvent-Salesforce integration? [42]
- GeoCode Sunetting in 2023 [29]

List Views

- What is a list view and how can it help me? [43]
- How do I create new list view or clone an existing one? [43]
- How do I switch between different list views? [43]
- How do I pin a list view? [43]

Logging In

- What is the login URL for Salesforce? [44]
- How do I reset my Salesforce password? [44]
- I am not receiving Marketing Cloud's identity validation email. What should I do? [45]

Notifications (Chatter)

- How do I post in Chatter? [15]
- How do I set my Chatter notifications? [15]
- Why am I not seeing all of my Chatter posts? [15]

Quarterly Release Notes

- Quarterly Release Notes [6]

Reports

- How do I build Salesforce reports? [46]*
- What is the difference between a campaign and a report? [8]
- What is the relationship between reports, campaigns, and data extensions? [9]
- Why do reports have such complicated names? [10]
- How do I request a new report? [47]
- How do I modify an existing report? [46]*
- What data can I use to build audience reports? [48]
- How do I view a report? [49]
- Reporting on Preferred Name.* [50]
- How do I share a report with another user? [14]*
- How do eComm specialist create Reports with CAN-SPAM compliance? [36]*
- GeoCode Sunsetting in 2023 [29]

Subscriptions

- Is there a way for me to grow my audience? [51]
- Can folks subscribe to receive my communications? [51]

Troubleshooting

- How do I add a photo to my Salesforce profile? [52]
- Why did a specific person not receive my email? [53]
- Why can't I see a specific campaign, report, or dashboard? [14]
- I think I found a bug in Salesforce. What should I do? [54]
- I requested a change to a contact's email address and was told the change was complete, but the old value is still showing. What should I do? [18]
- Why is a particular contact missing from my audience report? [55]
- Why can't I send a Marketing Cloud message? [56]

Unsubscribe

- How do unsubscribes work? [57]
- How can a constituent unsubscribe or subscribe to communications? [57]
- How can a user view a constituents' email preferences? [57]
- How can users avoid violating CAN-SPAM? [35]
- How do eComm specialists avoid violating CAN-SPAM? [36]*

Users

- How do I request to become an eComm user? [58]

Something Else...

If our documentation couldn't answer your question, please let us know. Submit a help ticket [59] so we can assist you.

Watch a short video [60] if you're curious about how tickets get you the best and quickest response.

Now, click the + symbol next to the category that best describes your question to view available resources.

Note that items followed by a * can only be completed with the help of your eComm Specialist [3].

Training

- What is Marketing Cloud? Where can I get an overview? [4]
- What Marketing Cloud new user training is offered? [61]
- Are there additional training opportunities for more advanced Marketing Cloud users? [62]
- What is CAN-SPAM and how does it pertain to me? [63]
- How can users avoid violating CAN-SPAM? [35]
- **2023 Preference and Business Unit Optimization** [7]

Accessibility

- What should I think about in terms of accessibility? [64]
- How can I ensure my email is accessible? [65]

Audience

- How can I email donors? [66]
- How do I select my audience? [67]
- How can I email my audience using their campus email addresses? [68]
- Why are my audience report names so complicated? [10]

- Can I use the recipient's preferred name when communicating with my audience? [28]
- How do I add a new audience for my communications? [47]*

Automation

- How can I organize my work between Email Studio and Automation Studio? [69]
- How do I schedule a Salesforce Send Email in Automation Studio? [70]
- How do I schedule Data Extension imports in Automation Studio? [71]

Canceling an Email

- How do I cancel a scheduled send? [72]

CAN-SPAM

- What is CAN-SPAM? [73]
- What is the difference between a commercial and transactional email? [74]
- What are easy ways for users to avoid violating CAN-SPAM? [35]

Checklists & Quick Guides

All checklists & quick guides [75].

- Plan
 - Marketing Cloud Email Checklist [76]
- Test
 - Email Checklist (download) [77]
 - Email Checklist (electronic) [78]
- Audience & Sending
 - Update Audience Quick Tutorial (re-start Data Extension) [79]
 - Send Emails [80]
 - Salesforce Send Email Quick Tutorial [81]
 - Guided Send Quick Tutorial [82]
- For eComm Specialists
 - Creating Data Extensions [83]*

Data Extensions

- What is a data extension? [68]
- What is the relationship between data extensions, reports, and campaigns? [9]
- How do I build a data extension? [68]
- How do I import/refresh a data extension? [68]
- Can I import CSV data into a data extension? [84]*
- How do I delete a data extension? [85]
- Can preferred name be included in a Data Extension for personalization?* [50]

Dynamic Content

- Can Marketing Cloud emails have dynamic content to be custom to recipients based on pre-determined attributes? [86]
- Can I avoid sending multiple versions of a similar emails by using Dynamic Content? [86]

Einstein

- What is Einstein in Marketing Cloud? [87]
- Is artificial intelligence (AI) available to increase engagement with my emails? [87]
 - As of Oct. 2022, eComm users can request Einstein to be enabled. Provide the name of the Business Unit(s) you wish to have Einstein into the spreadsheet [88] (along with some other details) and it will be enabled by the following Monday.

Email Content

- How can I create an “add to calendar” link in an email? [89]
- Where can I access CU branded templates? [90]
- How do I save an email as a template? [91]
- How do I share an email? [92]*
- How do I create compelling content? [93]
- How do I use templates I've created to build an email? [94]

Email From Information

- What are send classifications, sender profiles, and delivery profiles? [95]
- How do I change my email from name? [47]*
- How do I change my email from address? [47]*
- What is the CU Footer for All emails? [32]

Folders

- How can I stay organized in Marketing Cloud? [96]
- How can I organize Salesforce Send Emails? [96]
- How can I organize Data Extensions? [96]
- How can I organize Tracking? [96]

Images

- How should I size my images? [97]
- Where can I locate great CU photography? [98]

Journey Builder

- Can I pre-set a series of emails to deliver to an audience to be more efficient? [99]

- Can I create a pre-set series of emails to deliver to an audience, where the next email is based on how the recipient engaged with the previous email? [99]

Login and Password Help

- How do I change my password? [44]
- What is my user name? [100]

Mobile

- How do I design for mobile? [101]
- How do I correct my top image display in mobile? [102]

Personalization

- How can I add personalization (from Salesforce) to my Marketing Cloud email? [28]
- How can I test or preview personalization in my email to ensure I did it correctly? [103]
- How can I add other personalized information (from outside of Salesforce) to my Marketing Cloud email? [104]*
- Preferred Name Rollout for eComm Specialists. [50]*

Reporting

- How do I use Discover Reports in Marketing Cloud? [105]
- How do I use the Audience Engagement Over Time report? [106]
- How do I use the Best Performing Send Day report? [107]
- How do I use the Deliverability - Complaint Rate report? [108]
- How do I use the Device Performance by Email Sends and Email Performance by Device reports? [109]
- How do I use the Recent Email Send Summary report? [110]
- How do I use the Time Between Send and Engagement report? [111]
- How do I Report on preferred name? [50]

Send/Schedule an Email

- How do I send an email? [80] (Guided Send or Salesforce Send Email options)
- Where can I view/cancel my scheduled email? [112]
- What is the relationship between campaigns, reports, and data extensions? [9]
- Why do I need an email footer and what should be in it? [113]
- What is throttling and how do I do it? [114]
- What should I consider when scheduling an email? [115]

Subject Lines and Preheaders

- How do I choose a subject line? [116]
- What is a preheader? [117]

- Can I add personalized data to the subject line and preheader? [118]
- How do I add an emoji to my subject line or preheader? [119]

Subscriptions

- Is there a way for me to grow my audience? [51]
- Can folks subscribe to receive my communications? [51]

Subscribers in Marketing Cloud

- What is a subscriber? [22]
- How can I view a subscriber? [120]
- How can I view subscriber status and what do the statuses mean? [120]
- How do I reactivate a subscriber? [120]*
- How do I convert a subscriber key to a contact ID? [121]

Testing

- How do I send a test email? [122]
- What should I look for in a successful test? [123]
- What is an A/B test and how do I perform one? [124]
- How can I test personalization? [103]
- Does the data appear in Salesforce? [125]

Templates

- Can I view CU and UCCS branded templates? [126]
- How can I access CU and UCCS branded templates? [127]
- How do I save an email as a template? [128]
- How do I use templates I've created to build an email? [94]

Tracking and Reporting

- Why is tracking important? [129]
- Where can I view tracking information for my email? [130]
- How can I export tracking information for my email? [131]*
- How can I compare the data of different email sends? [131]
- What is Datorama? [132]
- What is Einstein? [87]

Troubleshooting

- My message ended up in a spam folder. How can I prevent this? [133]
- How do I fix a broken link in an email I already sent? [134]
- Are there checklists that can help me do my job better? [135]
- With what browsers is Marketing Cloud compatible? [136]

- [Why didn't a contact receive my email?](#) ^[53]
- [Why can't I send emails from Marketing Cloud?](#) ^[56]
- [I can't see the audience list I'm sending to. What should I do?](#) ^[14]

Unsubscribe

- [How do unsubscribes work?](#) ^[57]
- [How can a constituent unsubscribe or subscribe to communications?](#) ^[57]
- [How can a user view a constituents' email preferences?](#) ^[57]

Users

- [How do I add a new user or update a license?](#) ^[137]*

Something Else...

If our documentation couldn't answer your question, please let us know. [Submit a help ticket](#) ^[59] so we can assist you.

Watch a short video ^[60] if you're curious about how tickets get you the best and quickest response.

Now, click the + symbol next to the category that best describes your question to view available resources.

Note that items followed by a * can only be completed with the help of your eComm Specialist ^[3]. Additionally, some of the links below require that you are logged into Cvent to access their help and resources.

Training

- [What is Cvent? Where can I get an overview?](#) ^[4]
- [What Cvent training is available?](#) ^[138]
 - [Cvent Academy \(including certifications\)](#) ^[139]
- [How can I contact Cvent Help & Support?](#) ^[140]
- [Does Cvent offer training and support resources?](#) ^[140]
- [Quarterly Cvent Release Notes](#) ^[141]

Abstract Management

- [What is Abstract Management?](#) ^[142]
- [How do I get Abstract Management and other Cvent add-ons?](#) ^[143]

Accessibility

- How can I plan an accessible event? [144]

Add-Ons (Abstract Mgmt., Attendee Hub, etc)

- What additional Cvent products are available for purchase? [143]

App

- Does Cvent have an app for event attendees? [145]
 - What is CrowdCompass? [145]
 - How far ahead should I plan if I'm going to use CrowdCompass? [145]
 - How much does CrowdCompass cost? [146]
 - Is there a way I can offset CrowdCompass costs? [146]
- Does Cvent have an app for event planners to check attendees in? [42]
 - What is OnArrival? [42]

Approval and Launch

- How do I submit my event for approval? [147]
- Why do I have to submit my event for approval? [147]
- How do I launch my event? [147]

Attendee Hub

- Does Cvent have a product to help support virtual or hybrid events? [148]
- What is Virtual Attendee Hub? [148]
- How do I get Attendee Hub and other Cvent add-ons? [143]

Capacity

- How do I give my event or agenda items a capacity? [149]

Checklists & Quick Guides

All checklists & quick guides. [75]

- Plan
 - Cvent Build Checklist [150]
 - Event Strategy Checklist [151]
- Test
 - Event Checklist (download) [152]
 - Event Checklist (electronic) [153]
- Event Approval & Launch
 - How-To Request Approval & Launch Event [154]
 - Event Approval Checklist (used by event approvers) [155]

- What to check before opening registration (from Cvent) ^[156]
- Fundraising Events
 - Create a fundraising event ^[157]

Classic Sunset

- When is Cvent Classic sunsetting? ^[158]
- Are there live, virtual training to help me transition away from Classic? ^[159]
- Are there training available on-demand to help transition away from Classic? ^[160]

Contacts

- How do I add a new contact type for my event? ^[47]*

CrowdCompass

- What is CrowdCompass? ^[145]
- Does Cvent have a mobile app to support events? ^[145]
- How do I get CrowdCompass and other Cvent add-ons? ^[143]

Email

Email Communication

- How can I communicate with past attendees? ^[161]
- How do I send event and session emails? ^[162]
- How can I ensure an email was sent and delivered? ^[163]
- If I'm sending an event reminder in Marketing Cloud, how do I exclude people who have already registered? ^[164]

Email Policies

- How do I send an event invitation through Cvent? ^[165]
- What event emails are sent through Cvent? ^[165]
- What is the difference between a commercial and transactional communication? ^[166]
- Does my Cvent email need to have an unsubscribe option? ^[166]
- Do my Cvent emails need to contain the Cvent footer and privacy policy? ^[167]

Email Setup

- How do I add a new event planner email address? ^[168]*
- What should my Cvent emails include? ^[167]
- Does my Cvent email need to have an unsubscribe option? ^[166]
- Do my Cvent emails need to contain the Cvent footer and privacy policy? ^[167]

Event Participants

- What are the different ways to record event participation? [169]
- Why should I bother recording event participation? [170]
- How can I use event participation data? [170]
- How do I access event participation data? [171]
- How do I record event participation data? [172]
- How do I view event participation in Salesforce? [173]
- How can I communicate with past attendees? [161]

Event Preparation

- What are planner alerts? [174]
- How do I print name badges and invoices in Cvent? [175]
- Can I track who didn't complete registration (abandoned registrants)? [176]

Financial Information

- What account code should I use? [177]
- What speedtype should I use? [177]
- What designation code should I use? [157]
- How do I get an account code, speedtype, or designation code added to Cvent? [47]*
- How do I issue a refund? [178]
- What is PCI compliance? [179]
- How can I accept credit card information outside Cvent? [179]
- What are Cvent's credit card fees? [180]
- How do I create a fundraising event? [157]
- What test credit card numbers can I use? [181]

Fundraising

- How do I create a fundraising event? [157]

Guests

- How do I configure my event to collect guest information (in addition to the primary registrant)? [182]
- How can I get event guests added to Salesforce? [183]

Images

- What image sizes should I use? [184]
- Where can I locate great CU photography? [98]
- Where can I learn more about CU branding? [185]

Integrations

- How does the Cvent-Salesforce integration work? [40]
- How can I find my Cvent event in Salesforce? [40]
- How can I get event guests added to Salesforce? [41]
- How can I track event attendees to get the most out of the Cvent-Salesforce integration? [42]
- Can I integrate Cvent with other platforms not supported by eComm? [186]

Invitation Forwarding

- How do I use invitation forwarding? [187]

Logging in and Password Help

- What is our Cvent account name? [100]
- What is my user name? [100]
- How do I reset my password? [100]

On-Site Tools and Support

- How can I run check-in at my event? [42]
- What is OnArrival? [42]
- Can I collect credit card payments on-site? [179]
- What devices support OnArrival? [42]
- Does OnArrival offer session check-in? [188]
- How can I get OnArrival Premium? [42]
- What is Event in a Box, and how much does it cost? [189]

Paid Event

- What account code should I use? [177]
- What speedtype should I use? [177]
- What designation code should I use? [157]
- How do I get an account code, speedtype, or designation code added to Cvent? [47]*
- How do I issue a refund? [178]
- What is PCI compliance? [179]
- How can I accept credit card information outside Cvent? [179]
- What are Cvent's credit card fees? [177]
- How do I create a fundraising event? [157]
- What test credit card numbers can I use? [181]

Portal (for Reports)

- How can I give someone else at CU access to event Reports (for free)? [190]
- How are Reports managed in the Portal?* [191]

Promote Event

- How do I promote my event? ^[192]

Questions

- Adding Event Questions ^[193]

Registration Types

- Adding Registration Types ^[194]

Reporting

- How do I run Reports for my event? ^[195]
- What is the portal and how do I get Reports published to it? ^{[190]*}
- How can a stakeholder get access to view Cvent reports in real time? ^{[190]*}
- How do I create a report of events created by one user? ^{[196]*}

Sharing

- How do I share my event with another user? ^[197]

Support

- What kinds of support and resources can I get through Cvent? ^[140]

Survey

- Configure Event or Session Survey ^[198]
- How do I send a survey to my event participants? ^[198]

Templates

- Where can I view CU-branded event templates? ^[199]
- How do I access CU-branded event templates? ^[200]
- Where can I learn more about CU branding? ^[185]

Testing

- How should I test my event? ^[201]
- Is there a testing checklist that can help me be successful? ^[135]
- What test credit card numbers can I use? ^[181]

Troubleshooting

- [What are Cvent's recommended browsers?](#) ^[202]
- [Special Characters in Cvent Event Titles & Payment Processing Issues](#) ^[203]

Use

- [Should I be a Cvent user? I host one event a year.](#) ^[204]

Waitlists

- [How do I set up event waitlists?](#) ^[205]

Website

- [Where do I find my event weblink?](#) ^[192]
- [How do I create a custom URL?](#) ^[206]
- [How do I hide my event from search engines?](#) ^[207]

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Apsona

- [How do I add contacts using Apsona?](#) ^[13]
- [How do I match against existing contacts using Apsona?](#) ^[13]
- [How do I add campaign members in bulk using Apsona?](#) ^[13]

Business Units and Marketing Cloud Permissions

- [How do I grant access to a business unit or unit?](#) ^[208]
- [How do I view a user's permissions?](#) ^[208]
- [How do I change a user's permissions?](#) ^[208]
- [What roles and permissions should a user have?](#) ^[209]
- [What roles and permissions should an eComm Specialist have?](#) ^[209]
- [How do I integrate a user with Salesforce?](#) ^[210]

- How do I request a new business unit? [211]

Campaigns

- How do I add contacts to a Salesforce campaign in bulk? [13]
- How do I share a campaign with another user? [14]
- How do I share a campaign with a public group? [14]
- Why do campaigns have such complicated names? [10]
- How do I add contacts to a Salesforce campaign in bulk? [13]

Chatter

- How do I post in Chatter? [15]
- How do I set my Chatter notifications? [15]
- Why am I not seeing all of my Chatter posts? [15]

Checklists & Quick Guides

All checklists & quick guides [75].

- Creating Data Extensions [83]
- Event Approval Checklist (used by eComm specialists) [155]

Cvent

- How do I approve an event? [212]
- Is there a checklist I should use when approving an event? [135]
- How do I add a new contact type? [47]
- How do I add a new event planner email address? [168]
- How do I get an account code, speedtype, or designation code added to Cvent? [168]
- How do I reset a user's password? [213]
- What is the Cvent Portal for Reports? [190]
- How do I manage Reports in the Cvent Portal? [191]
- How do I create a test user? [47]
- Can Cvent be integrated with other platforms not supported by eComm? [186]

Dashboards

- How do I create a dashboard? [31]

Data Extensions

- How do I build a data extension? [68]
- Can I import CSV data into a data extension? [84]

Duplicates

- Why are there duplicate contact records? [19]
- How do I merge two or more contacts? [19]

Email Preferences

- How do I modify a contact's email preferences? [33]
- How do I change the name of an existing email preference? [214]
- How do I create a new email preference? [214]

Onboarding

- What steps are involved in the onboarding process? [215]
- How do I know if a user is a good candidate for an eComm license? [216]
- How do I know what requests are in the queue to be addressed next month? [217]
- How can I check who passed the required post-training quiz? [217]
- What tasks need to be complete if a new user is joining an existing group? [218]

Password Resets & Permissions

- Marketing Cloud
 - What access should a Marketing Cloud User have? [209]
 - How do I reset a user's password or help them with multi-factor authentication (MFA)? [208]
 - How do I grant access to a business unit or unit? [208]
 - How do I view a user's permissions? [208]
 - How do I change a user's permissions? [208]
 - How do I integrate a user with Salesforce? [210]
- Cvent
 - What access should a Cvent user have? [219]
- General
 - What tasks must a user request from an eComm specialist? [47]
 - Is there a detailed breakdown of roles and responsibilities? [220]
 - What roles and permissions should a user have? [209]
 - What roles and permissions should an eComm Specialist have? [209]

Personalization

- How can I add personalized information (that is in Salesforce) to my Marketing Cloud email? [28]
- How can I add personalized information (that is not in Salesforce) to my Marketing Cloud email? [104]
- How do you preview/test personalization? [103]

Public Groups

- What is a public group? [221]

- How do I add users to an existing public group? [221]
- How do I create a new public group? [221]

Release Notes

- Quarterly Release Notes [141]

Reports

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