

# eComm

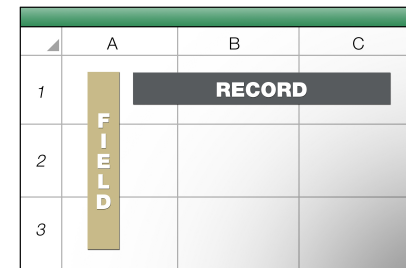
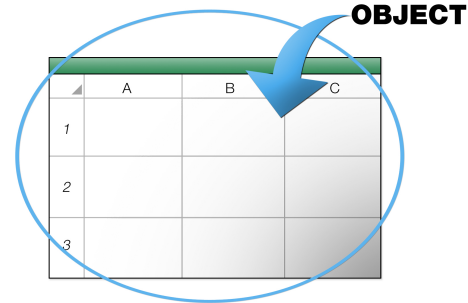
## Salesforce | Marketing Cloud 101 & Glossary of Terms

### -- SALESFORCE GLOSSARY --

**Object** is equivalent to *all* data in an Excel file, including the columns, rows and cell content. *Ex; Education*

**Record** is the equivalent of one row in an Excel file. *Ex; Sally Smith (the student)*

**Field** is the equivalent of what one column would include in an Excel file. *Ex; School/College, Major, GPA, etc.*



**Contact** represents a person associated with an account. Every contact is assigned to one, primary account.



**Accounts** are required for Salesforce, but don't really matter for Higher Education. You will not use accounts. For every account, there is a contact.



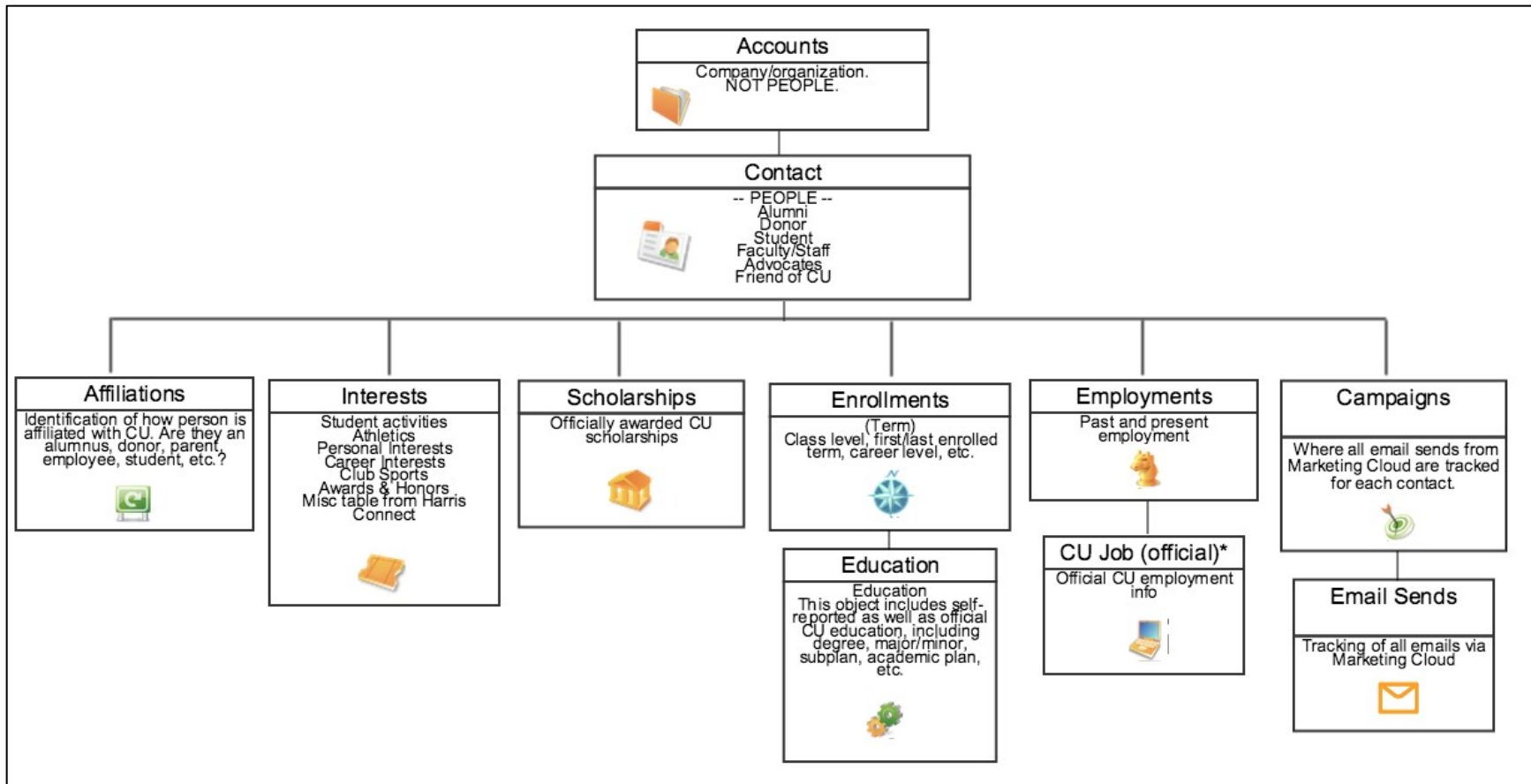
**Chatter** is a chat, social and collaboration tool that allows users to post questions, create/join groups, attach files, etc. Disclaimer: can only use Chatter with other users within CU's Salesforce single, enterprise environment.




**Production** is the Salesforce environment where users "do their jobs." There are several environments that you may hear referenced, which precede "Production," like "Sandbox," "Test," "Stage," etc.

## eComm Entity Relationship Diagram (ERD)

-- Objects in Salesforce --



-- OBJECTS, RECORDS & FIELDS --



The screenshot shows a Salesforce profile page for 'Ms. Clea Manchester'. Red annotations highlight key features:

- Shortcut 'tabs' to frequently-used objects. Customizable.**: Points to the top navigation bar containing 'Home', 'Accounts', 'Contacts', 'Chatter', 'Education', 'Interests', 'Employment', 'Reports', and 'Dashboards'.
- See more objects.**: Points to a plus sign icon in the navigation bar.
- Clea's Contact Record**: Points to the profile header area.
- Chatter**: Points to the social media-style interaction area with a 'Post' button and 'Followers' count.
- "Related Lists" -- Shortcuts to other objects that have information (data) about Clea.**: Points to a horizontal list of related lists such as 'Open Activities', 'Activity History', 'Individual Email Results', etc.
- FIELD S**: A vertical label on the left side of the 'Contact Detail' section.
- Data/Information Specific to Clea**: Points to the 'Contact Detail' section, which includes fields like 'Name', 'Preferred Name', 'Title', 'Maiden/Former First Name', 'Maiden/Last Name', 'Personal Suffix', 'Recent Donor?', and 'All Affiliations with Scope'.

-- MARKETING CLOUD GLOSSARY --

**Marketing Cloud** is the same as ExactTarget. Salesforce rebranded ExactTarget after they acquired the company. Marketing Cloud is a special digital marketing tool that is connected to CU's Salesforce environment.



**Subscriber** is equivalent to a Contact in Salesforce. A subscriber is a person who has opted-in to receive communications from CU.

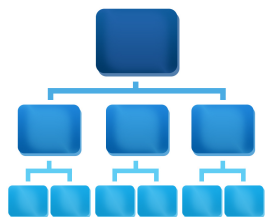


**Data Extension** is equivalent to an Object in Salesforce. For CU, a data extension will be used for transactional emails and loading specific data that might not be in Salesforce and will be used to customize email content.

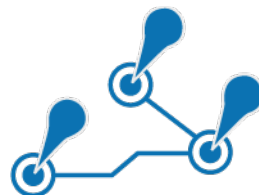


**Campaign vs Report**  
*Campaigns* are snapshots of contacts and are not dynamic/real-time. *Reports* are database/audience segmentation and are dynamic/real-time.

**Business Unit** is a hierarchical structure that controls access to and sharing of information. Admins also use Business Units to manage how unsubscribes are handled.



**Journey** is a tool for creating responsive, automated email campaigns that reach constituents at every stage of their journey with CU.



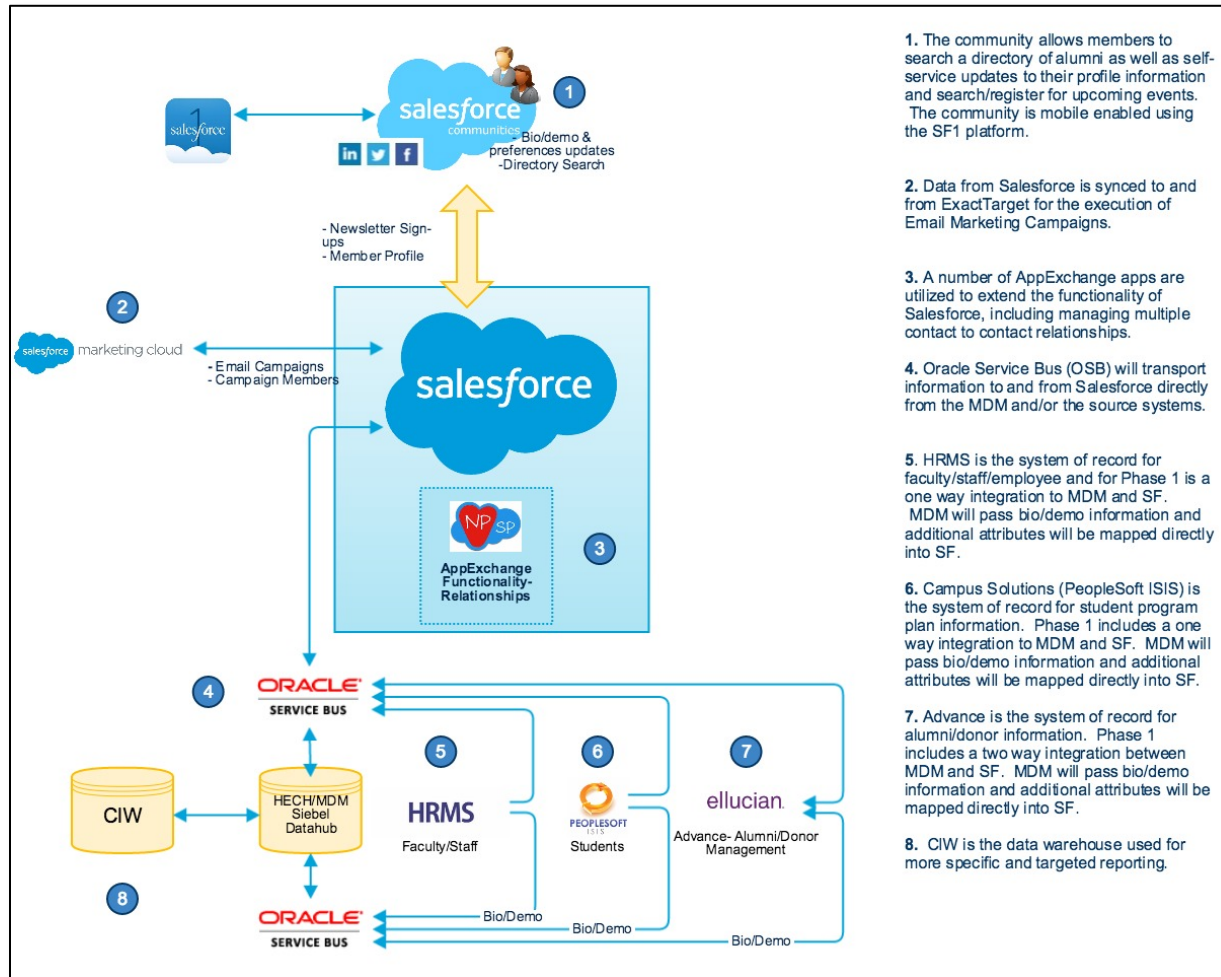
**Transactional** emails are messages relating to the business of CU (eg; emails about employee benefits, emergency alerts, etc). Recipients do not have the ability to opt out of receiving these types emails.



**Commercial** emails include emails like newsletters, event invitations, program announcements, etc. and that allow the recipient to opt-out of receiving future emails.



-- SALESFORCE & MARKETING CLOUD | *How it all works together* --



1. The community allows members to search a directory of alumni as well as self-service updates to their profile information and search/register for upcoming events. The community is mobile enabled using the SF1 platform.

2. Data from Salesforce is synced to and from ExactTarget for the execution of Email Marketing Campaigns.

3. A number of AppExchange apps are utilized to extend the functionality of Salesforce, including managing multiple contact to contact relationships.

4. Oracle Service Bus (OSB) will transport information to and from Salesforce directly from the MDM and/or the source systems.

5. HRMS is the system of record for faculty/staff/employee and for Phase 1 is a one way integration to MDM and SF. MDM will pass bio/demo information and additional attributes will be mapped directly into SF.

6. Campus Solutions (PeopleSoft ISIS) is the system of record for student program plan information. Phase 1 includes a one way integration to MDM and SF. MDM will pass bio/demo information and additional attributes will be mapped directly into SF.

7. Advance is the system of record for alumni/donor information. Phase 1 includes a two way integration between MDM and SF. MDM will pass bio/demo information and additional attributes will be mapped directly into SF.

8. CIW is the data warehouse used for more specific and targeted reporting.



-- YOUR ECOMM TEAM | *Contact Us* --

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