

eComm Upgrade: February 14, 2019 Project Update ^[1]



February 18, 2019 by [jennifer.mortensen](#) ^[2]

Nalini Kaplan, Director, Enterprise CRM, Center of Excellence, provided the updates below to the eComm team on Thursday, February 14.

What's in New Org: Current eComm plus new Lightning UI: Same / Equivalent Functionality

- Configured Salesforce including, Contact, Affiliation, Education, Employment, Email Preferences (consolidated on Contact), etc.
- Configured Marketing Cloud including business units, users, assets - templates, images and emails, etc.
- Data: Contacts flowing from MDM - sourced from Campus Solutions, Advance and HCM. Cross referenced contact ids from CRM01 and CRM03. Associated records including employment, education and affiliation.
- Cvent - stays the same. The CoE developed an integration which will default to new eComm and also flow appropriate records to CRM01.

The following programs/functionality are not yet in new org:

- Pharmacy Recruiting
- TaskRay
- UCB Alumni Engagement

The following programs/functionality are staying in current org:

- Several Boulder units: RIO, PhET, Center for the American West
- These units will be supported by Boulder SRC and the eComm Specialists will retain access to CRM01/MC01
- CoE License Management

eComm Specialist Role in Testing and Data Validation

eComm Specialists can select one or more persons to run through tests and validate data and may use the CoE test plans or create their own. We would expect eComm Specialist testing to be "day in the life" and cover eComm functionality.

Potential Hiccups

The MVP environment is not the same as a “stripped down” version of the platform. Rather, it is a fully functioning eComm service as it works today with the improved UI and data management. We are doing our best to eliminate potential hiccups, and our experience indicates that there could be issues of contact duplicates or mismatches, a user who might not be provisioned due to a timing issue, etc. The CoE is dedicated the bulk of the team to eComm cutover and support over the next 12-16 weeks.

Milestones through March 22

Nalini will review the pre, cutover and post cutover plans with the eComm Specialists. For each group, we anticipate the following activities - and we'll refine this list together with eComm Specialists and further CoE input:

- Group 1 Pre-Cutover
- Provision first set users - group 1 (CoE)
- Connect users to MC - group 1 (CoE)
- Migrate interim data - group 1(CoE)
- Develop and execute Group 1 Communications plan to users
- Train users in new features / UI / reporting (unsub process)
- Create reports and data extensions for new org needed for first weeks
- Migrate assets, templates and emails from MC01 to MC03 - final push (CoE)
- Verify assets, templates and emails avail for use
- Assign users to Salesforce report folders
- Assign users to business units in Marketing Cloud
- Group 1 Cutover

The CoE is honing the cutover/readiness checklists and will review and gather input and comment from the MECs starting 2/12/19.

Units not Migrating (at CU Boulder) and Cvent Functionality

For events created by units that are not migrating to new org, the creator of the event must specify that the event data should be integrated with CRM01. The CoE will train the eComm Specialists on this prior to each campus cutover.

Final Marketing Cloud Content Migration

The final content migrations will be scheduled as soon as we finalize the cutover dates for each campus so that the CoE can time the content pushes to the day before the cutover will take place.

New Marketing Cloud Login Information

The naming protocol is email address-mc03@campusemail.edu [3]. We will activate and connect users as part of the pre-cutover checklist.

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