

eComm Upgrade: Salesforce & Marketing Cloud UAT ^[1]



March 5, 2019 by [jennifer.mortensen](#) ^[2]

During the week of February 25, CU's eComm Specialists began a series of usability tests in Salesforce and Marketing Cloud to ensure that the final product delivered to users allows them to continue sending communications in the new environment. Several issues were identified that are currently being addressed by the COE team, and a second round of testing will occur as soon as the needed changes have been implemented. Testing will be ongoing until the expected outcome is reached, and campuses will then determine their desired migration dates.

A summary of the items tested with the user permission set in round one of UAT are included below.

Salesforce

- User is able to log in to the new org
- User is able to access an existing report that is in a report folder shared with them
- User is not able to access report folder that are not shared with them
- User can view all contacts
- User can view related objects (affiliations, employment, education, enrollment, etc.)
- User can create views (Campaigns & Email send)
- User can create campaign
- User can add contact to campaign
- User can share campaign with fellow user
- User can view FERPA flag on a contact
- User cannot change source system data for individual contacts
- User does not have access to Apsona

Marketing Cloud

- User is able to log in to Marketing Cloud with provided credentials
- User is able to create a data extension
- User is able to run/import a data extension
- User cannot access other Business Units
- User can create an email template
- User can create email/template from shared CU templates
- User cannot edit shared CU templates
- User cannot access reports in folders not shared with them

- User is able to access an existing email template that is part of their Business Unit
- User is not able to access email templates that are part of a Business Unit other than their own
- User is able to create email content and save it in their Business Unit
- User is not able to save the email content to a Business Unit they are not part of (it should not be an option to save to a BU they are not a member of)
- User is able to view content for previously created email content that is part of their Business Unit
- User is able to view email content that is shared in their Business Unit
- User is able to send a test email to a 1-5 email addresses
- User is able to do an actual send to 1-5 email addresses
- User is able to see that the send was successful in tracking
- User is able to send to a report placed in the report folder shared with them
- User is able to send to a data extension
- Email is received by the appropriate recipients
- Email contains correct header and footer information
- User can view Email Send in Salesforce (may need to request tracking immediately)
- User can view IER data in Salesforce (may need to request tracking immediately)

[eComm upgrade](#) [3], [UAT](#) [4], [testing](#) [5], [new org](#) [6]

Display Title:

eComm Upgrade: Salesforce & Marketing Cloud UAT

Send email when Published:

Yes

Source URL: <https://www.cu.edu/blog/ecomm-wiki/ecomm-upgrade-salesforce-marketing-cloud-uat>

Links

[1] <https://www.cu.edu/blog/ecomm-wiki/ecomm-upgrade-salesforce-marketing-cloud-uat>

[2] <https://www.cu.edu/blog/ecomm-wiki/author/13789>

[3] <https://www.cu.edu/blog/ecomm-wiki/tag/ecomm-upgrade>

[4] <https://www.cu.edu/blog/ecomm-wiki/tag/uat>

[5] <https://www.cu.edu/blog/ecomm-wiki/tag/testing>

[6] <https://www.cu.edu/blog/ecomm-wiki/tag/new-org>