

Monthly License Change Requests ^[1]

April 22, 2026 by [Melanie Jones](#) ^[2]

THIS WIKI IS UNDER CONSTRUCTION. **DO NOT SUBMIT REAL LICENSE CHANGES UNTIL APRIL 23RD, 2026**, AFTER ATTENDING TRAINING (OR WATCHING THE RECORDING) AND COMPLETING THE ASSOCIATED QUIZ. PROCESS CHANGES WILL BE PRECEDED WITH THE WORD 'CHANGE'.

This resource is designed for eComm specialists who are responsible for submitting provisioning and deprovisioning requests for their campus. Learn how to submit requests while being mindful of important deadlines and details that affect the user experience.

[Recorded Training | April 22, 2026](#) ^[3]

The recording is only accessible to eComm specialists with SharePoint access.

Exceptions to the following process and timelines CANNOT be accommodated.

Provisioning Requests

CHANGE: eComm specialists can submit access request changes once:

- the new user's contact record in Salesforce has the correct employee details, including:
 - Their university email is populated in a university email field (for example, a CU Boulder employee should have a UCB Email populated)
 - They have an employee ID
 - They have an active CU Employment record*
- the new user has completed [pre-access requirements](#) ^[4]
 - including a signed new user eComm agreement (which can be verified by them being in the 'eComm User Agreement' Campaign) and
 - completed Percipio courses (they should have provided you with a screenshot of their learning transcript)

The System team addresses requests submitted by the end of the month in a single batch during the first week of the following month, where new users get their credentials and training materials around the 5th.

*Common Troubleshooting | Duplicates & eComm Agreement

Sometimes the eComm agreement could have matched to a duplicate Contact and the MEC cannot request provisioning on the correct Contact. MECs can resolve this by:

1. **Correcting User Behavior (if relevant)**
 - If the user signed the agreement with an email other than their full university email (Identikey or abbreviated email), it may result in manual intervention at this phase and when they complete the quiz. The sooner we correct the user, the better.
2. **Submit a Data Change Request (DCR) ^[5] ASAP**
 - It's worth checking for and fixing duplicates as early in the month as possible (before submitting the request). Depending on the case, the DCR may resolve in a week but could take longer. If the DCR is resolved, you can submit the provisioning request.
3. **Manually add the correct contact to the Campaign: 08_20340227_eComm User Agreement**
 - Only do this after submitting the DCR and confirming they signed the agreement.
 - This should ONLY be done when the DCR has not been resolved yet and submitting the provisioning request is urgent.

Submit Provisioning Request

- CHANGE: Navigate to the **More** tab >> select **Access Request** in the dropdown



Contact
Christopher

Email (5) ▼

c 90@gmail.com

Email Opt Out



Employee ID

12345

Details

Related

UCB Email Prefs

UCD Email P

Name

Christopher



Contact

Individu

Middle Name



Acknowledge

- Please read through the User Access Change Request details and reminders.
- Then select the **Acknowledge** button in the bottom right.

User Access Change Request

eComm Specialists may submit a request for access, to update a user's access, or to deprovision a u

New eComm Specialists: Before you may submit a provisioning/deprovisioning request, please ma
not proceed if you have not passed the quiz.

Reminders:

- **Pre-Access requirements must be complete before you can submit a provisioning request.** signed new user agreement, and pre-access courses completed.
- Ensure the user's campus email is present and matches the campus you're provisioning.
- Provisioning a user or adding additional access will have budget implications for your campus. Y
time of submission.
- Deprovisioning a user will take affect immediately for Salesforce users. Only submit a deprovisio

Please acknowledge the above items to continue.

- Select your **Campus** - this field will auto-populate fields in the following screens
- Choose **Provision** and select the **Next** button

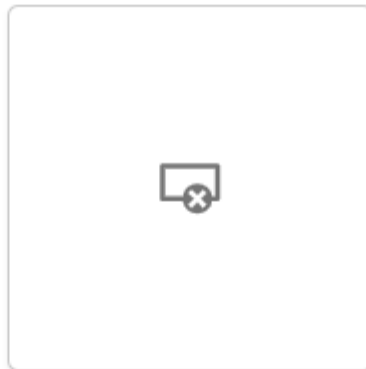
User Access Change Request

* Select your campus:

* What would you like to do today?



Provision



Deprovision

- Review details of current access (if relevant) and select the **Next** button. If they do not currently have access, you will not see this step.

User Access Change Request



This user already has the applications listed below

- Salesforce
- Marketing Cloud
- Apsona

If you'd like to remove access to an application, submit a deprovisioning request instead.

Previous

eComm Specialist Information

- **Affiliated Campus**
 - ?This is the campus you selected in the previous screen. If you need to change it, you will need to select Previous
- **eComm Specialist**
 - Will default to the campus based on the Affiliated Campus field
 - **Additional eComm Specialists** | This is only applicable in cases where a user is supported by multiple eComm specialists

New User Information

- **eComm Role**
 - The default is 'User'
 - Indicate 'User' for basic users.
 - Indicate 'User' for Super Users. The system eComm team should have advanced awareness of new Super Users to ensure certain licences are available (and procure more if needed).
 - Indicate 'MEC' if this is a new eComm Specialist. The system eComm team should have advanced awareness of a new eComm specialist to coordinate training and ensure certain licences are available (and procure more if needed).
- **This user is replacing another user who will be or is already deprovisioned** | Not checking this box indicates a 'net new' license, rather than being billed for a single

license that different people have used throughout the year.

- After checking the box, you'll find the names of fellow campus users* they are replacing. Start typing a name to narrow the list down.
- *You'll only see users who have the same campus as the user being provisioned.

- **Applications**

- ?If Cvent is selected, an option for **Cvent Add-ons** will display. Add-ons should already be contracted for before requesting access.

- **Super User Permissions**

- Super users for Paid Cvent Approval and Salesforce Reporting are only available at CU Anschutz, UCCS, and CU System currently. If you have interest, discuss with the System team.

- Select the **Next** button

User Access Change Request

eComm Specialist Information

* Affiliated Campus

System 

* eComm Specialist

System

Additional eComm Specialist(s), if applicable

N/A

Anschutz

Boulder

Boulder Adv

Denver

New User Information

* eComm Role

User

This user is replacing another user who will be or is already deprovisioned 

Applications

Salesforce

Marketing Cloud

Cvent

Event Management 

Apsona

Geopointe

Super User Permissions

Super Users are currently available only at CU Anschutz, UCCS, and CU System. You can review their permissions in [the wiki](#). If you're interested in adding Super Users for your campus or want to learn more, reach out to the System team.

Paid Cvent Approval 

Salesforce Reporting 

Unit / Department Information

- **Business Unit**
 - ?You may select more than one public group by holding down the control (CTRL) key and selecting additional options. Review your selections before you move on - if you accidentally click without selecting control (CTRL), it will clear out your other selections.
- **Public Group**
 - You may select more than one public group by holding down the control (CTRL) key and selecting additional options. Review your selections before you move on - if you accidentally click without selecting control (CTRL), it will clear out your other selections.
 - **New Public Group (if applicable)**

Billing Information

- **Billing Campus**
 - Defaults to the campus you selected when you started the request, however, you can change it here.
- **Campus Billing Speedtype**
 - Defaults to the campus you selected when you started the request, however, you can change it here.
- **Unit Billing Speedtype(s)**
- **Speedtype Notes** (if applicable) | Notes are generally not needed, aside to clarify:
12345 should be billed 20% and 98765 80%
- Select the **Next** button

User Access Change Request

Unit/Department Information

* Business Unit

N/A - MEC
N/A - User is Cvent and/or Salesforce only
CUA Advancement
CUA Alumni Relations
CUA Central Administration

* Public Group

N/A - MEC
N/A - User
N/A - User
New Public
01 Adv Bou

Billing Information

* Billing Campus


System

* Campus Billing

System – 510

* Unit Billing SpeedType(s)

N/A
New SpeedType Needed
Anschutz – 61000342
Anschutz – 61000530
Anschutz – 61000644

SpeedType Notes, if applicable 

Pre-Access Requirement Courses

- Populate course dates based on transcript (upload below). If courses are out of date, you cannot submit the request.

- Upload the screenshot for the course completion. When the file is uploaded, a green banner will appear indicating success.
- Click the **Submit** button.

User Access Change Request

Pre-Access Requirement Courses

Input the user's dates for each of the required trainings below

*To ensure proper user access, please verify that all dates entered are accurate. **Incorrect dates may please exit the provisioning process until you have the correct information.***

* Information Security & Privacy Awareness

* Information Security for IT Service Providers

* PCI Compliance

Course Completion Upload

Upload completed course screenshots below:

Or drop files

Request Complete

- Once submitted successfully, a final page with a green banner will appear. You can view the request if desired.
- Select **Finished** or navigate away from this page.

User Access Change Request



Your provisioning request has been submitted!

See the license record for this request [here](#).

What is 'Net New'?

When you look at a license, you may see the "Net New" box is checked. This is important for billing purposes. The Net New field on the license object will automatically be checked if you provision a new user and do not indicate they are taking a license from a soon-to-be or recently deprovisioned user.

When the fiscal year (July 1) begins, document the number of licenses you have for each application. Any licenses that you request throughout the year that exceed these original counts are considered 'net new'. For example:

- If a licensed employee leaves and the new position is filled, you likely will submit a deprovisioning request and a provisioning request. **Swapping a license like this will not be 'net new'.**
- Suppose a group decides to no longer use eComm (resulting in one deprovisioning request) and a different group decides to start using eComm (resulting in one provisioning request). In that case, **this license swap will not be 'net new'.**
- If a new group decides to start using eComm or an existing group expands (resulting in provisioning requests), **this will increase your original license counts and is 'net new'.**

?

View License Details

View Individual License Record

- After opening a **Contact**, navigate to the **Related** tab

- Hover **Licenses** and select the **License Number** to see the full License record

The screenshot shows the eComm system interface. At the top, there is a search bar and navigation tabs: Home, Chatter, Reports, Campaigns, Dashboards, and Contacts. The 'Contacts' tab is selected. Below the navigation, there is a 'Contact' header with a contact icon and a dropdown menu for 'Email (5)'. To the right, there are fields for 'Email Opt Out', 'Employee ID', 'SID', and 'Advance ID'. The main content area has several tabs: 'Details', 'Related', 'UCB Email Prefs', 'UCD Email Prefs', 'Anschutz Email Prefs', and 'UCCS'. The 'Related' tab is highlighted with a green box. Below the tabs, there is a 'Related List Quick Links' section with several links: 'Related Accounts (1)', 'Affiliations (0)', 'Applications (0)', 'Campaign History (0)', 'Data Change Requests (0)', 'Education (0)', 'Employment (1)', and 'Enrollments (0)'. The 'Licenses (1)' link is highlighted with a green box. Below the quick links, there is a 'Licenses' section with a red icon and the text '1 item • Updated a few seconds ago'. Below this, there is a table with three columns: 'License Name', 'Affiliated Campus', and 'eComm Specialist'. The table contains one row with the license number 'LN-0776' highlighted in a green box.

License Name	Affiliated Campus	eComm Specialist
1 LN-0776	Denver	Denver

Change User Business Unit or Public Group Access (off-cycle)

eComm specialists can request that an existing user be placed in different Business Units or Public Groups, without waiting for the monthly cycle. To do so:

- Use the instructions above to find a license
- Submit a help ticket ^[6] including details:
 - User Name & URL to License Record
 - Business Unit(s) / Public Group(s) to add
 - Business Unit(s) / Public Group(s) to remove
- You will be notified once the request is complete

Cvent			
Provisioning Requested			
Request Salesforce			eComm Mark Business Unit
Request Marketing Cloud			Public Group
Request Cvent			New Public G
Request Apsona			Provisioning C
Request Geopointe			

View Pending Requests

- Pending provisioning requests can be viewed on the **first row of the license dashboard** [7]. These will be addressed the following month, with new users getting credentials around the 5th.

eComm Home Chatter Reports Campaigns Dashboards Contacts Email Sends Licenses Cvent Dedupe Data Chan

Dashboard
08 ECOMM OG Monthly License Changes ALL
 As of Aug 25, 2022 11:22 AM Viewing as Melanie Jones

Campus Support | eComm Specialist Billing Campus eComm Public Group

equals Anschutz | Jason All

Provisioning Requests ... **2**

Provisioning Requests in Queue

Contact Name ↑	License: License Name	Salesforce	Request Salesforce	Marketing Cloud	Request Marketing Cloud	Cvent	Re
Eleanor	LN-1801	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thomas	LN-0802	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Requests submitted before the last day of the month will be addressed on the 1st business day of the following month.
[View Report \(08 System eComm Monthly Prov All\)](#)

View Existing Users

- To view a list of your active users, **view the license Dashboard [7], scroll to the last row**
- **View active licenses and select the license number** to see full details

eComm Home Chatter Reports Campaigns Dashboards Contacts Em

Luan Nguyen LN-0768 6/28/2022 12:34 PM

[View Report \(08 System eComm U...](#) [View Report \(08 System eComm Users Rec Prov Succ ALL\)](#)

Number of Users 🗨

78

[View Report \(08 System eComm U...](#)

Salesforce Users 🗨

75

[View Report \(08 System eComm U...](#)

Marketing Cloud Users 🗨

55

[View Report \(08 System eComm U...](#)

Cvent Users 🗨

35

[View Report \(08 System eComm U...](#)

Active eComm Users

See table end for totals per application

License: License Na...	Contact Name	eComm Public Group ↑
LN-0700	Kara	02 Alumni Relations
LN-0787	Julia	02 Alumni Relations; 09 Adv Anschutz L
LN-0786	Matt	02 Alumni Relations; 09 Adv Anschutz L
LN-0622	Kate	02 Campus Student Services
LN-0386	Mele	02 Center for Bioethics and Humanities
LN-0627	Jodi	02 Center on Aging
LN-0618	Wen	02 Clinical and Translational Sciences
LN-0510	Crist	02 Clinical and Translational Sciences; C
LN-0032	Dana	02 College of Nursing
LN-0781	Robe	02 College of Nursing
LN-0472	Mich	02 CU Alzheimer's and Cognition Cente
LN-0530	Layn	02 Facilities Management
LN-0600	Jesse	02 Facilities Management
LN-0788	Jessi	02 Facilities Management
LN-0789	Kade	02 Facilities Management
LN-0767	Jane	02 Gates Center
LN-0691	Kath	02 Health & Wellness Center
LN-0605	Kara	02 Human Resources

[View Report \(08 System eComm Users ALL\)](#)

Important Timing

Provisioning

Last Day of the Month

- Provisioning requests **MUST** be provided by the last business day of the month to be addressed during the first week of the following month.
- eComm specialists are encouraged to confirm a new user's contact has employment details populated correctly as early as possible (see ***Provisioning Requests*** section for full details). Fixing this requires coordination with campus HR and/or OIT, which may take a few days.

Around the 5th of the Month

- New users can anticipate credentials around the 5th of the month.
- eComm specialists are CC-d on the first new user emails, including credentials, reminders to complete the quiz, and when they complete the quiz.

Deprovisioning

60 Days After Getting Provisioned

- New users who fail to complete training and the quiz after 60 days should be deprovisioned (per the user agreement). The eComm specialist should 1) intervene when CC-d on 4 reminders to complete the quiz and review ROW 3 of the license Dashboard to see when the 60 days have passed.

Six months After Not Logging In

- Users who do not log in for six months should be deprovisioned (per the user agreement). eComm specialists are encouraged to audit this information in each tool.

Percipio Course Compliance

- Users must re-take the pre-access Percipio courses every 1-2 years. The system office automatically sends annual reminders to users and will reach out to an eComm specialist when a user is no longer compliant and needs to be deprovisioned. The eComm specialist is given a last opportunity to encourage the user to complete the necessary courses before being deprovisioned.

New User Experience



Four Steps to Get Started with eComm for New Users [8]

STEPS 1 & 2 | Discovery & Pre-Access Requirements

- eComm specialists should submit a provisioning request after meeting with a potential user for discovery [9], an important step to ensure eComm is the right fit. Pre-access requirements [4] must be completed by the last business day of the month for provisioning to occur during the first week of the following month.

STEP 3 | Login Details, Training & Quiz

- The System team will notify new users when their credentials are ready (**around the 5th of the month**) with the eComm specialist CC-d. New users will also receive relevant training courses and a **short post-training quiz, to be completed within the first month**.
- Once new users **complete the post-training quiz**, they will be **granted access to send Marketing Cloud emails and/or have Cvent events approved**. They will be notified via email (with their specialist CC-d) and provided with continued training resources.

Users who do not complete the post-training quiz will be reminded to do so. If the quiz is not completed after 60 days of obtaining access, eComm specialists are encouraged to deprovision them.

View Emails New Users Receive [10]

Deprovisioning Requests

Submit Deprovisioning Requests

- On a Contact Record, navigate to the **More** tab >> select **Access Request** in the dropdown
- Select the **Campus** and choose **Deprovision**
- Select the **Next** button


Details Related UCB Email Prefs UCD Email Prefs Ansch

User Access Change Request


* Select your campus:

--None--

* What would you like to do today?



Provision



Deprovision

- The applications the user has access to will show
- **Check the box(es) next to the applications** you want removed

- Select **Submit**

Details Related UCB Email Prefs UCD Email Prefs Ansch

User Access Change Request

Select the applications you'd like to remove access to below:

Salesforce

Marketing Cloud

View Pending Deprovisioning Requests

- Scroll to the **2nd row on the license dashboard** ^[11] to view deprovisioning requests that will be addressed during the first week of the following month.
- **CHANGE: Salesforce is deprovisioned immediately upon submission, although they will be billed through the end of the month. Submit the request when they no longer need Salesforce access.**

Deprovisioning Requests in ...

12

[View Report \(08 S...](#) As of Apr 22, 2026 8:29 AM

De-Provisioning Requests in the Queue

Contact Name ↑	License: License Name
Beth	LN-1216
Cindy	LN-1213
Dana	LN-1210
Elizabeth	LN-1215
Heidi	LN-1209

IMPORTANT: Salesforce deprovisioning occurs immediately, although
[View Report \(08 System eComm Monthly DEProv ALL\)](#)

Cvent Only Licenses

Chatter Free Users


Many users have a license in Cvent ONLY - and thus only pay for Cvent. If you are looking at a user's license record and notice both Salesforce and Cvent are checked, also look under the '*Permissions*' section to see if the '*Salesforce Profile*' is '*Chatter Free User*'. This means they are not paying for Salesforce access and instead have a '*Chatter Free User*' in Salesforce, which is free. This grants them access to the Collaborative Community ^[12] in Salesforce devoted to Cvent. See the example below.

If a user wishes to see Dashboards in Salesforce (or anything more than participate in the Collaborative Community), they require a full Salesforce license.



License

Casey

eComm Specialist ⓘ Anschutz 

Additional
eComm
Specialist(s)



eComm Specialist ⓘ ecommerce@cuanschutz.edu

eComm Specialist ⓘ
Email 2

∨ Permissions

eComm Role ⓘ User

Salesforce Profile ⓘ Chatter Free User

Not a Sender ⓘ

∨ Licenses

Salesforce ⓘ

Marketing Cloud ⓘ

Cvent ⓘ

Related Content

- [How do I view a contact?](#) [14]
- [What is the difference between a Standard Contact and an Individual Contact?](#) [15]
- [How do I modify information on a contact \(such as the email address\)?](#) [16]
- [How do I add a contact to a Salesforce campaign?](#) [17]
- [What are individual email results \(IERS\) and how can I use them?](#) [18]
- [How do I add contacts to Salesforce?](#) [19]
- [How can I match new contacts against existing contacts to avoid creating duplicates?](#) [20]
- [How will I know if a contact received my email?](#) [18]
- [How does a Salesforce contact relate to a Marketing Cloud Subscriber?](#) [21]
- [Is Salesforce GDPR compliant?](#) [22]

Display Title:

Monthly License Change Requests

Send email when Published:

No

Source URL: <https://www.cu.edu/blog/ecomm-wiki/monthly-license-change-requests>

Links

[1] <https://www.cu.edu/blog/ecomm-wiki/monthly-license-change-requests> [2]

<https://www.cu.edu/blog/ecomm-wiki/author/39>

[3]

<https://cu0.sharepoint.com/:x:/r/sites/eComm/Shared%20Documents/Projects/Monthly%20License%20Changes/ME>

[4] <https://www.cu.edu/ecomm/access-training/pre-access-requirements> [5]

<https://www.cu.edu/blog/ecomm-wiki/data-change-requests> [6] [https://www.cu.edu/ecomm/submit-help-](https://www.cu.edu/ecomm/submit-help-ticket)

[ticket](https://www.cu.edu/blog/ecomm-wiki/data-change-requests) [7] <https://cuecomm.lightning.force.com/lightning/r/Dashboard/01Zf4000000GRINEAW/view>

[8] <https://www.cu.edu/ecomm/training> [9] <https://www.cu.edu/ecomm/access-training/discovery>

[10] <https://www.cu.edu/blog/ecomm-wiki/new-user-onboarding-journey>

[11] <http://cuecomm.lightning.force.com/lightning/r/Dashboard/01Zf4000000GRINEAW/view>

[12] <https://www.cu.edu/blog/ecomm-wiki/collaborative-communities>

[13] <https://forms.gle/gCXxzLW2iTvXiSUZ9>

[14] https://www.youtube.com/watch?v=06N1nEM_KOk&feature=youtu.be

[15] <https://www.cu.edu/blog/ecomm-wiki/standard-contacts-vs-individual-contacts>

[16] <https://www.cu.edu/blog/ecomm-wiki/creating-contact-information-salesforce>

[17] <https://www.cu.edu/blog/ecomm-wiki/create-salesforce-campaign-and-add-campaign-members>

[18] <https://www.cu.edu/blog/ecomm-wiki/salesforce-individual-email-results-iers>

[19] <https://www.cu.edu/blog/ecomm-wiki/adding-and-matching-contacts-apsona>

[20] <https://www.cu.edu/blog/ecomm-wiki/using-salesforce-apsona> [21] [https://www.cu.edu/blog/ecomm-](https://www.cu.edu/blog/ecomm-wiki/salesforce-contacts-marketing-cloud-subscribers)

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