

Monthly License Change Requests ^[1]

August 22, 2025 by [Melanie Jones](#) ^[2]

AS OF APRIL 7, 2026, THIS WIKI IS UNDER CONSTRUCTION AND WILL BE UPDATED BY APRIL 15TH, 2026. IF YOU HAVE A QUESTION ABOUT ECOMM LICENSE CHANGES IN THE MEANTIME, PLEASE DIRECT THEM TO YOUR ECOMM TEAM.

DO NOT SUBMIT REAL LICENSE CHANGES UNTIL APRIL 16, 2026 AFTER ATTENDING TRAINING (ON APRIL 15, 2026) AND COMPLETING THE ASSOCIATED QUIZ.

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.

Exceptions to the following process and timelines CANNOT be accommodated for any reason.

Provisioning Requests

eComm specialists submit provisioning requests throughout the month, after the following are completed:

- Relevant Percipio courses must already be completed (confirmed via dates provided and file uploads to the user's license record), and
- A signed user agreement (both the user and their supervisor must sign the agreement)

The System team then addresses these requests in a single batch during the first week of each month. New users will get their credentials and training materials around the 5th of the following month.

How to submit a provisioning request

Review Contact

Before submitting a request, it's important to confirm that you're provisioning the correct

person based. on their employment with CU. To do so, view the **Contact** record along with the **Related** tab.

1. Does their university email populate in a university email field? *For example, a CU Boulder employee should have a UCB Email populated.*
2. Do they have an employee ID?
3. Do they have an active CU Employment record?*

***People of Interest (POI)** POIs are a temporary type of university employee whose data displays in Salesforce differently compared to a typical employee. **POIs will not have an Employment record in Salesforce, but it's important to confirm 1) that an Employee ID is populated, and 2) that their university email displayed is the respective university email field in Salesforce.** The eComm specialist or POI may need to work with their campus OIT team to get their email address populated in Salesforce. Inactive POIs or those missing a university email in Salesforce CANNOT be provisioned.

Submit Request UPDATE

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

The screenshot displays a Salesforce interface for a Contact record. At the top, there is a purple icon representing a contact and the name "Christopher". Below this, there are three columns of information: "Email (5)" with a dropdown arrow and a partial email address "c 90@gmail.com"; "Email Opt Out" with a dashed box icon; and "Employee ID" with the value "12345". Below this information is a tabbed interface with four tabs: "Details", "Related", "UCB Email Prefs", and "UCD Email P". The "Details" tab is selected and underlined. Under the "Details" tab, there are two rows of information: "Name" with the value "Christopher" and a pencil icon for editing; and "Middle Name" with a blank field and a pencil icon for editing. On the far right, there is a label "Contact" and the text "Individu".

- Choose **Provision** and select **Next**

IMAGE

- Review details of current access (if relevant) and select **Next**.

IMAGE

- Populate eComm specialist information:
 - **Affiliated Campus**
 - **eComm Specialist**
 - **Additional eComm Specialists (if applicable)**

IMAGE

- Add user information, including:
 - **eComm Role**
 - **What do you want this user to have access to?**
 - **Business Unit**
 - **Public Group**
 - **New Public Group (if applicable)**
- Select the **Next** button

IMAGE

IMAGE

ADD PERCIPIO & AGREEMENT DETAILS

- Use Global Search
- Navigate from the License

- **Search** by name or email address in the top bar. Select the **Contact's name**

The screenshot shows a search interface for 'daniella torres'. The search bar at the top right contains the text 'daniella torres'. Below the search bar, the navigation menu includes 'Home', 'Chatter', 'Reports', 'Campaigns', 'Dashboards', and 'Contacts'. On the left side, there is a 'Search Results' sidebar with 'Top Results' listed: 'Contacts' (3), 'Campaigns' (1), 'Licenses' (1), 'Reports' (5), and 'Email Sends' (5+). The main content area shows a search confirmation message: 'We searched for "daniella torres".' Below this, a message states: 'Showing results for "daniella torres" and spell-corrected terms.' The 'Contacts' section displays '3 Results • Sorted by Relevance'. A table lists the results:

Name	Email	Contact
Daniella Torres Solano	daniella.torres@cu.edu	Individual
DANIELA TORRES	dltorres007@yahoo.com	Standard
Dani Torres Rivera		Individual

- Confirm it's the right Contact by **checking the License record** on the **Related** tab (instructions in next section)
- Select the **Content name** from the **License** record



License
Megan

License Name	Affiliated Campus	User Email	Salesforce	Mar
LN-0615	Denver		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Related **Details**

▼ User Information

User <i>i</i>	Megan <i>e</i>	Active User <i>i</i>	
Contact <i>i</i>	Megan <i>e</i>	Provisioning St	
User Email <i>i</i>	megar	edu	Type of Request
Affiliated Campus <i>i</i>	Denver	Requested By	
eComm Specialist <i>i</i>	Denver	Requested On	
Additional eComm Specialist(s) <i>i</i>	<i>i</i>	Salesforce User	
eComm Role <i>i</i>	User	Marketing Clo	
Salesforce Profile <i>i</i>	eComm User	Not a Sender	

▼ Licenses

Salesforce <i>i</i>	<input checked="" type="checkbox"/>	Apsona <i>i</i>
Marketing Cloud <i>i</i>	<input checked="" type="checkbox"/>	Geopointe <i>i</i>

- Navigate to the **Related** tab of the Contact
- Hover **Campaign History** to find the **eComm User Agreement Campaign** with the date/time signed
- You may need to **View All** to see this Campaign

The screenshot shows a user interface for an eComm system. At the top, there is a search bar and a navigation menu with items like Home, Chatter, Reports, Campaigns, Dashboards, and Contacts. Below the navigation, there is a 'Contact' header with a profile icon and several fields: Email (5), Email Opt Out (checkbox), Employee ID, SID, and Advance ID. A tabbed interface below shows 'Details', 'Related', 'UCB Email Prefs', 'UCD Email Pref', 'Anschutz Email Prefs', and 'More'. The 'Related' tab is active and contains a 'Related List Quick Links' section with items: Related Accounts (1), Affiliations (2), Applications (0), and Campaign History (10). The 'Campaign History' link is highlighted with a green box. Below this is a 'Campaign History' section with a table of 10 items. The table has columns for Campaign Name, Start Date, and Type. The fourth row, '08_20180430_eComm User Agreement', is highlighted with a green box. At the bottom right of the table area, there is a 'View All' button, also highlighted with a green box.

	Campaign Name	Start Date	Type ↑
1	08_20210215_M	2/15/2021	Cvent Event
2	03_20210928_Fl	9/28/2021	Cvent Event
3	08_20280312_et	3/12/2028	Cvent Event
4	08_20180430_eComm User Agreement	4/30/2018	Cvent Event
5	08_20180430_ε	4/30/2018	Cvent Event
6	01_20160304_ε	3/4/2016	Cvent Event
7	03_20190502_C	5/2/2019	Cvent Event
8	08 EMPL 20201		Email
9	08 EMPL 20201		Email
10	03SS SEM CON		Email

What is 'Net New'?

When you request a license, you may be asked if it is 'net new'. This is important for billing

purposes.

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 for Home, Chatter, Reports, Campaigns, Dashboards, and Contacts. The main content area displays a contact's profile with a 'Contact' header and fields for Email (5), Email Opt Out, Employee ID, SID, and Advance ID. Below this, there are tabs for Details, Related, UCB Email Prefs, UCD Email Prefs, Anschutz Email Prefs, and UCCS. The 'Related' tab is selected and highlighted with a green box. Underneath, there is a 'Related List Quick Links' section with various links like Related Accounts (1), Affiliations (0), Applications (0), Campaign History, Data Change Requests (0), Education (0), Employment (1), and Enrollments (0). The 'Licenses (1)' link is also highlighted with a green box. Below this, the 'Licenses' section is expanded, showing a table with one license entry: LN-0776, affiliated with Denver campus, and assigned to Denver as the eComm Specialist.

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

View Pending Requests

- Pending provisioning requests can be viewed on the **first row of the license dashboard** [3].
- The **second row of the Dashboard** indicates those without completed pre-access requirements who will be held until the following month. REMOVE FROM DASHBOARD!! UPDATE IMAGE BELOW
 - *View details on the license or contact for which requirements are out-of-date.*



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

equals Anschutz | Jason Thomas

All

Provisioning Requests ...

2

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

Provisioning Requests in Queue

Contact Name ↑	License: License Name	Salesforce	Request Salesforce
Eleanor Shields	LN-0801	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Thomas Forlenza	LN-0802	<input type="checkbox"/>	<input checked="" 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 \(08 System eComm Monthly Prov All\)](#)

SkillSoft NOT submitted ...

2

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

SkillSoft NOT Submitted or Expired

Contact Name ↑	License: License Name	Requested On
Eleanor Shields	LN-0801	8/23/2022 10:2
Thomas Forlenza	LN-0802	8/24/2022 4:1

Users will NOT receive login credentials until they complete Pre-Access Requirements. For more information, see the Pre-Access Requirements page.
[View Report \(08 System eComm Monthly Prov Skill ALL\)](#)

View Existing Users

- To view a list of your active users, **view the license Dashboard** [3], **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 I
LN-0786	Matt	02 Alumni Relations; 09 Adv Anschutz I
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.

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 ??? of the license Dashboard to see when the 60 days have passed!!!!

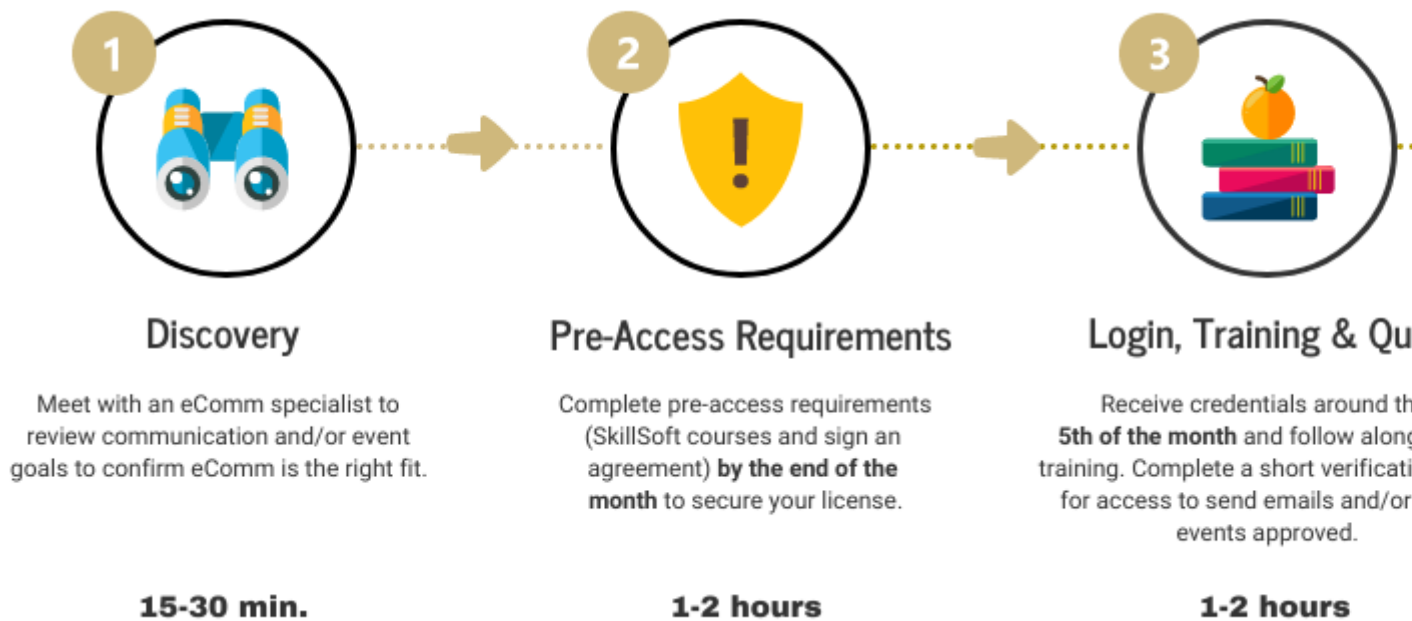
Six months After Not Logging In

- 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 reminders to users annually and will reach out to an eComm specialist when a user is no longer compliant and therefore 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 [4]

STEPS 1 & 2 | Discovery & Pre-Access Requirements

- eComm specialists should submit a provisioning request after meeting with a potential user for discovery [5], an important step to ensure eComm is the right fit. Pre-access requirements [6] 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](#) [7]

Deprovisioning Requests

Submit Deprovisioning Requests UPDATE IMAGE!!!

System Information

Created By	 UIS Integration Agent , 12/28/2018 9:08 PM	Contact Own
Last Modified By	 Melanie Jones , 8/4/2022 11:51 AM	Employee ID
Contact 18 Id		IdentiKey
Advance ID ⓘ		UCB UUID
SID ⓘ		Constituent
CRM01 Contact ID		eComm Prov

- Change the dropdown option to **Deprovision**

* Provision or Deprovision?

Deprovision

- Verify the tools in which the user is currently licensed so you know what to remove.
- **Check the applications** to remove and select **Next**

This user has the applications listed below:

Salesforce | Marketing Cloud | Cvent | |

What do you want to remove?

- Salesforce
- Marketing Cloud
- Cvent
- Apsona
- Geopointe

Previous

Next

View Pending Deprovisioning Requests

- Scroll to the **3rd row on the license dashboard** [8] to view deprovisioning requests that will be addressed during the first week of the following month. **Note, Salesforce is deprovisioned immed!!!! UPDATE IMAGE**

eComm Home Chatter Reports Campaigns Dashboards Contacts

Preston Bruce	LN-0791	7/26/2022 11:2
Thomas Forlenza	LN-0802	8/24/2022 4:1
Tracy Berger	LN-0023	8/4/2022 9:2

Users will NOT receive login credentials until they complete Pre-Access Requirements. [View Report \(08 System eComm Monthly Prov Skill ALL\)](#)

View Report (08 System eComm M...

De-provisioning Reques... 5

De-Provisioning Requests in the Queue

Contact Name ↑	License: License Name	Salesforce	Remo
Alisha Meyer	LN-0624	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Betty Kilsdonk	LN-0130	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mike Hellman	LN-0670	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sandra Romero	LN-0223	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sarah Mensch	LN-0181	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

View Report (08 System eComm M...)

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](#) [9] 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 Email 1		ecommerce@cuanschutz.edu	
eComm Specialist Email 2			

Permissions

eComm Role		User	
Salesforce Profile		Chatter Free User	
Not a Sender		<input type="checkbox"/>	

Licenses

Salesforce		<input checked="" type="checkbox"/>	
Marketing Cloud		<input type="checkbox"/>	
Cvent		<input checked="" type="checkbox"/>	

License Changes Quiz for eComm specialists | REQUIRED FOR SUBMITTING REQUESTS

[10]

Related Content

- [How do I view a contact?](#) [11]
- [What is the difference between a Standard Contact and an Individual Contact?](#) [12]
- [How do I modify information on a contact \(such as the email address\)?](#) [13]
- [How do I add a contact to a Salesforce campaign?](#) [14]
- [What are individual email results \(IERs\) and how can I use them?](#) [15]
- [How do I add contacts to Salesforce?](#) [16]
- [How can I match new contacts against existing contacts to avoid creating duplicates?](#) [17]
- [How will I know if a contact received my email?](#) [15]
- [How does a Salesforce contact relate to a Marketing Cloud Subscriber?](#) [18]
- [Is Salesforce GDPR compliant?](#) [19]

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Links

- [1] <https://www.cu.edu/blog/ecommerce/wiki/monthly-license-change-requests> [2] <https://www.cu.edu/blog/ecommerce/wiki/author/39>
- [3] <https://cuecommerce.lightning.force.com/lightning/r/Dashboard/01Zf4000000GRINEAW/view>
- [4] <https://www.cu.edu/ecommerce/training> [5] <https://www.cu.edu/ecommerce/access-training/discovery>
- [6] <https://www.cu.edu/ecommerce/access-training/pre-access-requirements> [7] <https://www.cu.edu/blog/ecommerce/wiki/new-user-onboarding-journey>
- [8] <http://cuecommerce.lightning.force.com/lightning/r/Dashboard/01Zf4000000GRINEAW/view>
- [9] <https://www.cu.edu/blog/ecommerce/wiki/collaborative-communities> [10] <https://forms.gle/gCXxzLW2iTvXiSUZ9>
- [11] https://www.youtube.com/watch?v=06N1nEM_KOk&feature=youtu.be
- [12] <https://www.cu.edu/blog/ecommerce/wiki/standard-contacts-vs-individual-contacts>
- [13] <https://www.cu.edu/blog/ecommerce/wiki/updating-contact-information-salesforce>
- [14] <https://www.cu.edu/blog/ecommerce/wiki/create-salesforce-campaign-and-add-campaign-members>
- [15] <https://www.cu.edu/blog/ecommerce/wiki/salesforce-individual-email-results-iers>
- [16] <https://www.cu.edu/blog/ecommerce/wiki/adding-and-matching-contacts-apsona>
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