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Salesforce Implementation FAQs 3.0 [1]

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?Training

I have events in Harris Connect that take place Oct. 1, Oct. 15 & Nov. 13. We are also getting ready to launch a bunch of new Fall trainings. Are we going to lose the ability to do events?
Harris Connect will be available until Feb 2016 and all ability to process credit cards will also be available until then. However, we recommend you work with your accounting team to determine the most ideal time to stop accepting credit cards as you will also lose the ability to pull reports, refund, etc - any activity that supports accounting/reporting/reconciling.

Will there only be one date for the Oct eComm training?
We are still working on the logistics of the fall training. More to come.

When you say user training is on Oct 19, is that the only day or will you have several options like we had that were since canceled?

We are still working on the logistics of the fall training. More to come.

Will the October training include event tool or will that be a separate training?
We would like to include a portion of the form tool in the Oct training. We are working towards that, but are not certain if we will have enough time to build, test and launch before then. More to come.

? Uploaded Email Lists

Who will be able to enter "renegade Lists"?
At this point, we think the campus eComm program managers will have full rights to do so on behalf of users.

What about rogue mailing lists when emails are not known?
I need more information on this. Please email to contact@cu.edu [2] to provide additional details.

Costs

Will we be charged for using this new system? We haven't paid for using Harris up till now.
I am so sorry, but I do not know this. The hope is that the solution is a "common good" and users will either pay a minimal license fee or nothing at all. We recommend that you reach out to your campus CFO and/or eComm program manager for details.

Harris Archive Project (HAP)

So is February the absolute drop dead deadline for pulling our reports out of Harris?
Yes. After February, Harris users will not be able to login to Harris Connect.

?Database Management

Is the feed from HRMS, CS, and Advance to MDM transferred in real time?
Biographical and demographical data is delivered real-time. All other data is delivered in nightly batches. Bio/demo data is bidirectional shared ONLY with Advance for alumni, donor and friend information. Bi-directional sharing of other alumni, donor and friend data (eg; self-reported employment and education) is slated for a future release in the fall/winter.

Is Salesforce is able to access HRMS data via a read-only API, or are they making use of the nightly-feed flat file?
HRMS data will be in the form of a part of a nightly data feed - not an API but data actually

resides in Salesforce.

? Event Management Tool

Do you all have a running list or document of the needs that were requested for the event management tool? It might be helpful to make that available for us all to review and add what could be missing. I'd hate to send you a list of needs you already know about and have on your radar.
Yes. We have the list. You can find it here [3]. Send questions and comments to contact@cu.edu [2] related to this list of business requirements.

After February 2016, what will we use for our online event registration tool?
We will have a forms solution that includes event registration, membership and giving before Harris sunsets in Feb 2016. We hope to begin iterative releases in the fall of 2015.

For needs that have been requested of the event management tool, do you all have a document you would be willing to share with the group to review?
Yes. We have the list. You can find it here [3]. Send questions and comments to contact@cu.edu [2] related to this list of business requirements.

Is the forms management tool = to an event tool?
Yes.

Will Salesforce ever be meant for event management, like CME events?
I don't know what "CME" refers to, but yes. We plan to have a forms solution that includes event registration, membership and giving as part of the eComm Salesforce solution before Harris sunsets

What is the status of an event tool?
We are currently searching for a solution, but hope to make an announcement in August.

? Timeline

How long will we be able to build new credit card payment portals within Harris? (will the new contract through Feb 2016 affect previously announced deadlines)
Harris Connect will be available until Feb 2016 and all ability to process credit cards will also be available until then. However, we recommend you work with your accounting team to determine the most ideal time to stop accepting credit cards as you will also lose the ability to pull reports, refund, etc - any activity that supports accounting/reporting/reconciling.

If Oct. 26th is the cutoff for Harris emails, will Harris still be available for event registration forms only through February 2016?
Yes.

When will the new system be available, and what is it?
The email marketing solution for eComm is Salesforce and Marketing Cloud (a Salesforce

product) - the two are connected. The forms management tool (events, membership and giving) is unknown at this time. We hope to announce the new solution in August.

User Acceptance Testing (UAT)

Can those involved in UAT still access Salesforce in the test environment?
Yes. I believe so.

Do training items get transferred from the Stage sandbox to the Production SB?
It is not the plan to transfer content/lists that were built during UAT. If you built something like email content, it will not be transferred. That said, please email at contact@cu.edu [2] to discuss this further. We may have options.

Groups audience:
eComm

Source URL:https://www.cu.edu/ecomm/salesforce-implementation-faqs-30

Links
[1] https://www.cu.edu/ecomm/salesforce-implementation-faqs-30 [2] mailto:contact@cu.edu [3] https://www.cu.edu/sites/default/files/pages/56649-ecomm-salesforce-implementation-2015/docs/ecommformbrs20150515.xlsx