



eTrigue Corporation
6399 San Ignacio Avenue
San Jose, CA 95119

www.etrigue.com

800.858.8500 toll-free
408.490.2901 fax

eTrigue[®] DemandCenter[®]

CRM Integration Test Checklist

eTrigue Support performs Quality Assurance testing prior to enabling CRM Integration for an eTrigue DemandCenter account. Users are encouraged to perform additional testing when changes are made to the CRM systems to test for core functionality of the eTrigue CRM Integration services.

Use this quick checklist below to test to ensure core functionality of CRM Integration.

✓	Object / Feature	Test Scenario	Normal Behavior
	CRM Lead	Create a new Lead in CRM that does not exist in eTrigue.	A new prospect in eTrigue is created for the Lead within 30 mins to 1 hour.
	CRM Contact	Create a new Contact in CRM that does not exist in eTrigue.	A new prospect in eTrigue is created for the Contact within 30 mins to 1 hour.
	CRM Lead/Contact	Update a Lead or Contact field that is mapped TO eTrigue.	The eTrigue record is updated with the new data from CRM within 30 mins to 1 hour.
	eTrigue Prospect	Update an eTrigue prospect field that is mapped TO CRM.	The CRM record is updated with the new data from eTrigue within 30 mins to 1 hour.
	Function: Push	Create an eTrigue prospect that does not exist in CRM. Push the prospect from their record details.	A new Lead in CRM is created for the eTrigue prospect within 5 minutes.
	Function: Push	Receive an eTrigue Real-Time Lead Alert for a prospect that does not exist in the CRM. Push the prospect from the alert's Push to CRM button.	A new Lead in CRM is created for the eTrigue prospect within 5 minutes.
	eTrigue Campaign	Create an eTrigue campaign with Sync Campaign with CRM enabled. Add a prospect to this campaign.	The CRM campaign with the same matching name in eTrigue will have the matching Lead/Contact added as a campaign member within 30 mins to 1 hour.
	Function: Opt-Out	Update a Lead/Contact's [Email Opt-Out] field to 'TRUE' (checked).	The eTrigue prospect's [Status] field is set to "Opt-Out" within 30 mins to 1 hour.
	Function: Opt-Out	Update an eTrigue prospect's [Status] field to 'Opt-Out'.	The CRM record's [Email Opt Out] field is set to 'TRUE' (checked) within 30 mins to 1 hour.