Updating Contact Information in Salesforce [1]

July 17, 2024 by jennifer.mortensen [2]

We all come across periodic bad data now and then from old email addresses to incorrect mailing addresses after CU constituents move. What's the best way to correct this information in Salesforce? The answer depends on a few factors.

Individual Contacts

If the error is located on an individual contact record [3], that means that the data in that record is populating from one of CU's source systems. As such, the change needs to happen in the associated source system to populate in Salesforce correctly.

Email Address Changes

Salesforce contacts have several email fields, and the process to correct email address errors depends on the field in which the error occurs.

- **Email**: The email address in the Email field is populated by the preferred email address in Advance. If you need to make a change to the email field, please follow the steps below:
  - **If the contact has an Advance ID on their record in Salesforce**, email advancement.datamanagement@cu.edu [4] to update their primary email address. Once you receive notification that the change is complete, you see it in Salesforce the following day after the nightly data load.
  - **If the contact does not have an Advance ID on their record in Salesforce**, contact your eComm Specialist [5] so that they can initiate a correction with the System eComm Team. System eComm can populate the primary email address and it shouldn't get overwritten unless an Advance ID (and primary email) gets assigned later.
- **UCB, UCD, UCCS, SYS Emails**: The email addresses in any of the campus fields are populated by one of CU's other source systems, such as HRMS or Campus Solutions. If you encounter an error in one of these email fields, contact your eComm Specialist [5] so that they can initiate a correction with the System eComm Team.

Physical Address Changes

- Salesforce contact have several physical mailing address, but home address is the most reliable address in Salesforce because it is populated from Advance (and therefore goes through regular rigorous checking to ensure accuracy).

- If you need to make a change to the home address field, the correction needs to occur in Advance. To make a change, email advancement.datamanagement@cu.edu [4]. Once you receive notification that the change is complete, you see it in Salesforce the following day after the nightly data load.

Other Changes

- If you notice incorrect information on other aspects of a contact record, contact your eComm Specialist [5] for assistance.

NOTE If you receive notification that a change has been made in Advance but you don't see the correct data populating in Salesforce after the nightly data load, please contact your eComm Specialist [5] so we can investigate the Advance-Salesforce integration.

Standard Contacts

If the error is located on a standard contact record [3], your eComm Specialist should be able to correct the record for you. Contact your eComm Specialist [5] for assistance.

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