

Workflow: Managing the Email Opt Out Field in Salesforce

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Blank and/or inconsistent email preferences in Salesforce are often caused by data discrepancies between Salesforce and Advance when a contact opts out of or into all CU emails. The email opt out field is not integrated (bidirectionally or otherwise) with the email values in the Advance source system. The lack of integration between the platforms presents a risk that when a contact is opted out in Salesforce, that information is not sent to Advance. Thus, the values often don't match and are at risk of being overwritten during manual data loads.

In order to mitigate this risk, the System eComm team has implemented a manual process to ensure that the email opt out values in Salesforce match the email opt out values in Advance. A basic overview of the process in place to ensure parity between Salesforce and the Advance source system is below.

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Email Opt Out

- Contact Opts Out
- Email Opt Out = TRUE
- Weekly Change File
- No Discrepancy

Contact Opts Out

A contact reaches out to a MEC and requests to be opted out of all emails, or the contact updates email preferences using the link at the bottom of a Marketing Cloud email.

Email Opt Out = TRUE

The MC Integration Agent or the MEC change the Email Opt Out value on the contact from FALSE (blank) to TRUE (checked). Salesforce changes all associated email preferences to FALSE (blank).

Weekly Change File

The System team compiles and sends a weekly report of FALSE to TRUE changes in the Email Opt Out field to Records. The Advance source system is updated.

No Discrepancy

When a manual data load occurs, the TRUE value in Salesforce will match the TRUE value in Advance. No discrepancy occurs.

Email Opt In

- Contact Opts In
- Email Opt Out = FALSE
- Weekly Change File
- No Discrepancy

Contact Opts In

A contact reaches out to a MEC and requests to be opted back into all emails.

Email Opt Out = FALSE

A MEC changes the Email Opt Out value from TRUE (checked) to FALSE (blank) and manually re-checks the associated email preference categories.

Weekly Change File

The System team compiles and sends a weekly report of TRUE to FALSE changes in the email opt-out field to Records. The Advance source system is updated.

No Discrepancy

When a manual data load occurs, the FALSE value in Salesforce will match the FALSE value in Advance. No discrepancy occurs.

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