Email Opt Out/In Workflow

While eComm Specialists can easily update the Email Opt Out field on the contact in Salesforce, it is essential that any changes made are also reflected in the Advance source system. Ensuring parity between the systems will help eComm avoid data errors and inconsistencies going forward.

Email Opt Out

1

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.

2

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).

3

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.

4

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

1

Contact Opts In

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

2

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.

3

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 source system is updated.

4

No Discrepancy

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