Inconsistent Email Preferences

Research has revealed that blank and/or inconsistent email preferences in Salesforce are caused by a broken business process when a contact opts out of or into all CU emails. When a contact is opted out in Salesforce, that information is not sent to Advance, so email opt out values are being overwritten every time there is a manual upload of email preferences.

1

Contacts Opt Out of Email via MC or MEC

Contacts reach out requesting to be opted out of all emails, or contacts update their preferences using the link at the bottom of a Marketing Cloud email.

2

Salesforce Updates Contact to Email Opt Out = True

The Email Opt Out value on the contact is changed from FALSE (blank) to TRUE (checked). All associated email preferences are changed to FALSE (blank).

3

Email Opt Out = True is never sent to Advance

Since there is no integration between Salesforce and Advance, the contacts are still opted into emails in Advance even though they are opted out in Salesforce.

4

Advance Value Remains Email Opt Out = False

The Email Opt Out Value on the contact in Advance remains FALSE even though the value in Salesforce is TRUE.

5

Advance Preference Upload Creates Discrepancy

When a manual data load of email preferences occurs, the TRUE value in Salesforce is overwritten with the FALSE value in Advance.

The same is true if a MEC changes email opt out to FALSE at the request of the constituent. Assuming that the record in Advance is still email opt out = TRUE, the false value will be overwritten during the manual upload.