Published on *University of Colorado* (https://www.cu.edu)

Updating Contact Information in Salesforce [1]

June 2, 2025 by Megan [2]

We all come across periodic bad data now and then, from old email addresses to incorrect mailing addresses after CU constituents move. Or, a constituent requested their contact information to be changed. 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 Salesforce correctly. To see a visual flowchart of how and where to update contact information, see the PDF here [4](you may need to request access).

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 [5] 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 [6] 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, or a constituent contacts you and asks to change one of these emails, it will need to be fixed by going through your campus process. Please see below for your campus resources related to these changes. Should you have questions about this, please contact your eComm Specialist [6]

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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 [5]. Once you receive notification that the change is complete, you see it in Salesforce the following day after the nightly data load.

Preferred and Legal Name Changes

The name fields for individual contacts in Salesforce are populated by various source systems, and the process to submit changes depends on whether they need to go to Advancement or through your campus procedures. Should you have questions about this, please contact your eComm Specialist [7].

- **If the constituent is an employee or student**, they will need to follow your campus procedures to make this change. Please see below for your campus resources related to these changes. Once the process is complete on your campus side and it has been updated in CU People, you will see it in Salesforce.
- **If the constituent is an alumnus, donor, or other type of constituent with an Advance ID**, email advancement.datamanagement@cu.edu [5] to update their primary email address or name. Once you receive notification that the change is complete, you see it in Salesforce the following day after the nightly data load.

Employee Preferred and Legal Name Change:

- All CU employees [8]

Student Preferred Name Change:

- CU Anschutz [9]
- CU Boulder [10]
- CU Denver [11]
- UCCS [12]

Student Legal Name Change:

- CU Anschutz [9]
- CU Boulder [13]
- CU Denver [14]
- UCCS [15]

Other Changes

- If you notice incorrect information on other aspects of a contact record, contact your eComm Specialist [6] for assistance.

NOTE If you receive a 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 [6] 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 [6] for assistance. To see a visual flowchart of how and where to update contact information, see the PDF here [16](you may need to request access).

Individual & Standard Contacts (Email Opt Out)

If a Contact (regardless of the type being Individual or Standard) needs changes to the 'Email Opt Out' field (to be opted out or opt back in), an eComm specialist can help by following these instructions [17].

New Contact Update Process

In June 2025, eComm enabled a new process for constituents to update their contact information. These updates come from the constituent clicking "update your contact information" in the footer of an email. In the new process, the constituent fills out the contact update form, and the update is either sent to Advancement, updated automatically, or may need campus support.

- Individual Contacts
    - Advancement receives the update request if the contact has an Advance ID, and the current email matches the "Email" field, as this email comes from Advancement
    - A request may need campus support when:
        - The constituent asks to change their *name,* and they have an email in a *campus email* field, or the constituent asks to change their *email,* and they do not have an Advance ID. These updates will need to be evaluated by the campus partner or eComm Specialist using the process outlined above to determine if this request needs to go through a campus HR process or another source system. These updates cannot be made directly in eComm.
        - The constituent asks to update their contact information, but they do not match a contact in eComm's Salesforce. This situation would be rare, and the campus partner or eComm Specialist would need to investigate where this contact information lives.
- Standard Contacts
    - If the constituent matches a standard contact, the update will happen automatically.

"Needs Campus Support" Contact Updates

- To see a guide for troubleshooting "Needs Campus Support" requests, please see here [18](you may need to request access).
- If you are an eComm Specialist, you will have access to a report that contains contact update requests (Salesforce Reporting wiki [19] >> scroll to *Templates* >> select *Administrative* tab >> select *Contact Update*).
    - Remember that you can save the report for your campus (please use the appropriate naming conventions [20]), and add criteria to narrow down to only show your business units, and contact updates with "needs campus support" checked. You can also subscribe to the report so it is sent to you on a regular cadence.
- If the "Needs Campus Support" column is checked, and the business unit falls under one of your users, please evaluate the request according to the process outlined above for individual and standard contacts. Determine if the request is appropriate, and which source system the requested update should take place within. Remember to double check the "needs campus support" requests for accuracy. Always double check for duplicate records or data that could have been mixed up within eComm or an external source system like Ascend.
    - Remember that the "email" field in eComm comes from Ascend. If there is an Ascend data issue or update needed, please reach out to Advancement at advancement.datamanagement@cu.edu [5] with the relevant information.
    - If the constituent needs to go through a campus process, please provide that information to the constituent or work with your eComm users to communicate that information.
- Check the box under "Request Evaluated" so other eComm Specialists know the request has been addressed.

Related Content

- How do I view a contact? [21]
- What is the difference between a Standard Contact and an Individual Contact? [3]
- Why are there duplicate contact records? [22]
- How to I merge two or more contacts? [22]
- How do I add a contact to a Salesforce campaign? [23]
- What are individual email results (IERs) and how can I use them? [24]
- How do I add contacts to Salesforce? [25]
- How can I match new contacts against existing contacts to avoid creating duplicates? [26]
- How will I know if a contact received my email? [24]
- How does a Salesforce contact relate to a Marketing Cloud Subscriber? [27]
- Is Salesforce GDPR compliant? [28]

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[4]
https://cu0.sharepoint.com/:b:/r/sites/eComm/Shared%20Documents/Contact%20Updates/Contact%20Update%20F
[5] mailto:advancement.datamanagement@cu.edu [6] https://www.cu.edu/ecomm/strategy/leadership
[7] https://www.cu.edu/ecomm/strategy/ecomm-specialists
[8] https://www.cu.edu/employee-services/collaborative-hr-services/cu-campuses/update-your-name-and-demographics#:~:text=Your%20legal%20name%20must%20be,Social%20Security%20Administration%20(SSA).
[9] http://www.cuanschutz.edu/registrar/student-resources/identity
[10]
http://www.colorado.edu/registrar/students/records/info/preferred#:~:text=Most%20CU%20Boulder%20Systems%20
,Select%20%E2%80%9CAccount%20Settings%2C%E2%80%9D%20then%20%E2%80%9CProfile%20and%20Priv
[11] http://www.ucdenver.edu/registrar/student-resources/identity [12] http://registrar.uccs.edu/student-resources/records-and-privacy/name-change-guidelines
[13] https://www.colorado.edu/registrar/students/records/info/legal
[14] https://www.ucdenver.edu/registrar/student-resources/identity [15] https://registrar.uccs.edu/student-resources/records-and-privacy/name-change-guidelines
[16]
https://cu0.sharepoint.com/:b:/r/sites/eComm/Shared%20Documents/Contact%20Updates/Contact%20Update%20F
[17] https://www.cu.edu/blog/ecomm-wiki/manually-managing-email-preferences
[18]
https://cu0.sharepoint.com/:b:/r/sites/eComm/Shared%20Documents/Contact%20Updates/Needs%20Campus%20R
[19] https://www.cu.edu/blog/ecomm-wiki/salesforce-reporting [20] https://www.cu.edu/blog/ecomm-wiki/naming-conventions [21] https://www.youtube.com/watch?v=06N1nEM_KOk&feature=youtu.be
[22] https://www.cu.edu/blog/ecomm-wiki/duplicate-contact-records-and-merges
[23] https://www.cu.edu/blog/ecomm-wiki/create-salesforce-campaign-and-add-campaign-members
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[25] https://www.cu.edu/blog/ecomm-wiki/adding-and-matching-contacts-apsona
[26] https://www.cu.edu/blog/ecomm-wiki/using-salesforce-apsona [27] https://www.cu.edu/blog/ecomm-wiki/salesforce-contacts-marketing-cloud-subscribers [28] https://www.cu.edu/blog/ecomm-wiki/understanding-gdpr