

Workflow: Managing the Email Opt Out Field in Salesforce

[1]



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Recent 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. There is no current integration between Advance and Salesforce (although creating that is a high priority for eComm going forward). The lack of integration between the platforms means that 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.

eComm Specialists should follow the process below when making changes to the Email Opt Out field in Salesforce to ensure parity between Salesforce and the Advance source system.

[Download Process PDF](#) [3]

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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