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Workflow: Managing the Email Opt Out Field in Salesforce [1]



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Blank and/or inconsistent email preferences in Salesforce are often caused by data discrepancies between Salesforce and CU Ascend 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 CU Ascend 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 CU Ascend. Thus, the values often don't match and are at risk of being overwritten during manual data loads.

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 CU Ascend. A basic overview of the process in place to ensure parity between Salesforce and the CU Ascend source system is below.

Download Process PDF [3]

Email Opt Out

- Contact Opts Out
- Email Opt Out = TRUE
- Automatically Update CU Ascend
- No Discrepancy

- A contact (or an eComm user) reaches out to an eComm specialist and requests to be opted out of all emails, or the contact updates their email preferences themselves using the link at the bottom of a Marketing Cloud email.

- The Marketing Cloud Integration Agent or the eComm specialist changes the *Email Opt Out* value on the Contact from FALSE (blank/unchecked) to TRUE (checked). Salesforce changes all associated email preferences to FALSE (blank).

- Contacts who have had a change of the *Email Opt Out* field from *FALSE* to *TRUE* are

automatically sent to CU Ascend nightly to be updated.

- When the data is shared automatically, the FALSE value in Salesforce will match the FALSE value in CU Ascend. No discrepancy occurs.

Email Opt In

- Contact Opts In
- Email Opt Out = FALSE
- Automatically Update CU Ascend
- No Discrepancy

- A contact (or eComm user) reaches out to an eComm specialist and requests to be opted back into all emails.

- An eComm Specialist changes the Email Opt Out value from TRUE (checked) to FALSE (blank/unchecked) and manually re-checks the associated email preference categories.
- They also should confirm that the corresponding Subscriber (in any Business Unit that they might receive messages from) has a green shirt status or cannot be found [4].
    - If they have a yellow or gray shirt status, add details to the Re-subscribe Request Sheet [5] to be completed weekly.
    - If urgent, submit a help ticket [6] to the System eComm Team (select ***Tell us what you need help with: Marketing Cloud*** > **Resubscribe Contact**).

- Contacts who have had a change of the *Email Opt Out* field from TRUE to FALSE are automatically sent to CU Ascend nightly to be updated.

- When the data is shared automatically, the FALSE value in Salesforce will match the FALSE value in CU Ascend. No discrepancy occurs.

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