

# How to Manage Contact Communication Preferences with the Salesforce and Mailchimp Integration

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## Introduction

Mailchimp's estimated market share is estimated to be around 75%, making it the largest mass email tool used by charities and businesses alike. Plus, the Mailchimp and Salesforce Integration is powerful, however there are a few 'gotchas' we wish to share with you.

Below are the Communication Preferences for my fictitious contact Jane Austen. This is a custom section on the page layout where we group the standard Salesforce fields with custom fields that handle Communication Preferences.

Communication Preferences

MC Status <span>i</span>	Subscribed	Newsletter Opt In	<input checked="" type="checkbox"/>	
MC Subscriber	<a href="mailto:jessica+jane+austin@blazeyourtrail.org">jessica+jane+austin@blazeyourtrail.org</a> - Blaze Your Trail	Do Not Call	<input type="checkbox"/>	
Email Opt Out	<input type="checkbox"/>	Deceased <span>i</span>	<input type="checkbox"/>	
Fax Opt Out	<input type="checkbox"/>	Do Not Contact <span>i</span>	<input type="checkbox"/>	
		Contact Flag	OK to Contact	

You can see that Jane has opted in for our newsletter. This is one of the conditions for the Mailchimp Query that runs daily - to add: **any new contacts with Newsletter Opt In = True to the Audience in Mailchimp**. Newsletter Opt In is a custom field that we add to all web forms and donation forms to be sure that we have express permission to market or fundraise.

The two fields that begin with MC are installed with the Mailchimp for Salesforce package.

1. The MC Status is Subscribed
2. The MC Subscriber field includes Jane's email ID and the Audience she is Subscribed to (Blaze your Trail is the name of my Newsletter Audience).

You can simply click on the MC Subscriber field and this will take you to the page shown below, where you can click on the Manage Subscriptions Button to adjust someone's subscription in Mailchimp.

The screenshot shows the Salesforce interface for a contact named Jane Austen. The contact is identified as a 'Mailchimp Subscriber' and is 'Subscribed' to the 'Blaze Your Trail' audience. The interface includes a navigation bar with 'Blaze Your Trail' and various menu items. The contact details section shows fields for 'Last Sync Date' (3/6/2023 06:30 AM), 'Last Activity Date', 'Interests', and 'Notes'. The 'Member Profile' section displays 'Address', 'First Name' (Jane), 'Phone Number' (614-212-3456), 'Company' (Blaze Your Trail), and 'Volunteer Status'. The 'Member Activity' section shows 'No records to display'. At the bottom, a 'Contacts' table lists the contact's details.

NAME	ACCOUNT NAME	PHONE	EMAIL	MAILING CITY	MAILING STATE/PROVINCE
Jane Austen	Jane Austen Household		jessica+jane+austin@blazeyourtrail.org		

## Mailchimp Lightning Web Component

You can also go to the Mailchimp Lightning Web Component and update the Subscription there. On my Contact Page layout I have a tab for Mailchimp, as shown below.

Contact  
**Jane Austen**

Contact

Primary Affiliation: [Blaze Your Trail](#)    Mobile: +61 421 234 567    Email: [jessica+jane+austin@blazeyourtrail.org](mailto:jessica+jane+austin@blazeyourtrail.org)

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[Details](#)   [Related](#)   [Quick Links](#)   [Twilio](#)   [Mailchimp](#)   [Cases](#)

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✓ Contact Details

Name	Jane Austen	
Primary Affiliation	<a href="#">Blaze Your Trail</a>	
Account Name	<a href="#">Jane Austen Household</a>	

Inside that tab I have the Mailchimp Lightning Web Component and I can manage my subscriptions from here. This is how you add the Lightning Web Component using the Visualforce Page Name 'Subscriber Contact' which is part of the Mailchimp installed package.

Page > Visualforce

Show Label

Label *i*

Leave blank for default...

\* Visualforce Page Name *i*

SubscriberContact *x*

Height (in pixels)

300

## Preference Centre

If you have a **preference centre** set up using groups, you can remove contacts from a particular group - typically fundraising appeals - but leave them in your general newsletter group.



Warning: This Contact has been opted out of email in Salesforce. This page will only allow unsubscribes in Mailchimp.

### Audiences

Blaze Your Trail	Subscribed <a href="#">Unsubscribe</a>
Test	Not Subscribed

### Groups

Unsubscribe me from news about	
<input type="checkbox"/>	Salesforce Innovation
<input type="checkbox"/>	Fundraising Inspiration
<input type="checkbox"/>	Alumni Stories

### Tags

<input type="text"/>
<a href="#">Add Tag</a>
<input type="checkbox"/> Partners
<input type="checkbox"/> Salesforce Users
<input type="checkbox"/> volunteers
<input type="checkbox"/> Winter 23
<input type="checkbox"/> Salesforce Staff
<input type="checkbox"/> Fundraising
<input type="checkbox"/> Mother's Day
<input type="checkbox"/> Current Active Status Project

A Preference Centre allows your subscribers control over the types of email communications they receive. Be sure to add a link to your Preference Centre in the footer of every email you send, right next to the Unsubscribe button. In Mailchimp we use Groups to manage Preferences.

## Deceased Contacts

When a person is marked **Deceased** in Salesforce, the NPSP will automatically mark them Email Opt Out, Do not Call and Do not Contact, as well as remove them from the Household Naming conventions.

But what about Mailchimp? The Salesforce Mailchimp Integration will add people to your Audience/List using scheduled queries, **but it will not remove an email subscriber when they are marked Deceased**. Here is what you do.

This is what happens AFTER you mark a contact as deceased in Salesforce.

1. Email Opt Out is checked
2. Do Not Call is checked
3. Deceased is checked
4. Do Not Contact is checked
5. Contact Flag is Red (this is a customisation, not standard NPSP) \*\*\*

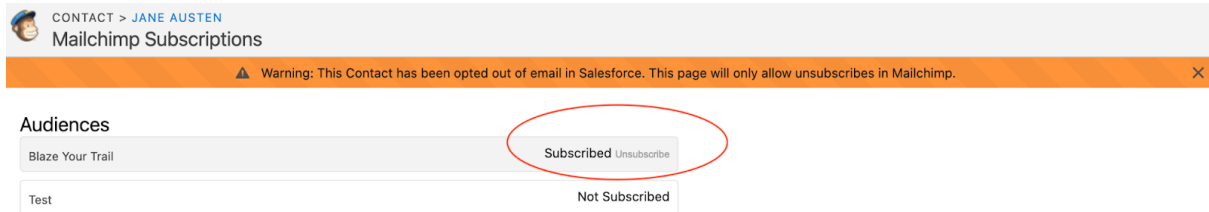
### Communication Preferences

MC Status	<b>Subscribed</b>	Newsletter Opt In	<input checked="" type="checkbox"/>
MC Subscriber	<a href="mailto:jessica+jane+austin@blazeyourtrail.org">jessica+jane+austin@blazeyourtrail.org</a> - Blaze Your Trail	Do Not Call	<input checked="" type="checkbox"/>
Email Opt Out	<input checked="" type="checkbox"/>	Deceased	<input checked="" type="checkbox"/>
Fax Opt Out	<input type="checkbox"/>	Do Not Contact	<input checked="" type="checkbox"/>
		Contact Flag	Do Not Contact

You will note however that marking this contact as deceased has not changed these three fields

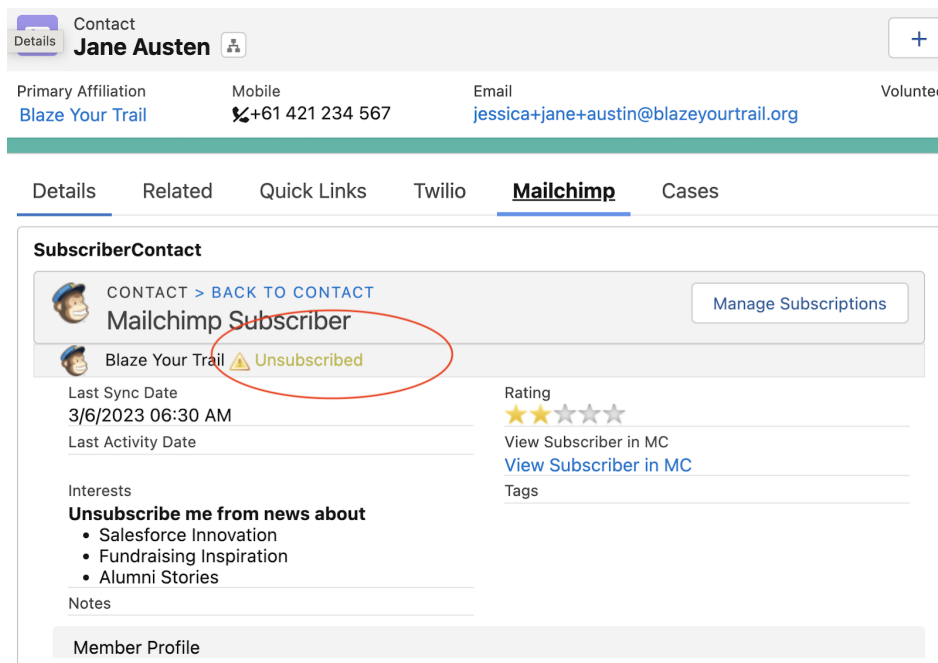
3. The MC Status
4. The MC Subscriber
5. Newsletter Opt In (as this tracks that they DID opt in at point of sign up or donation at a point in the past)

If you click on the MC subscriber field however you will see a BIG WARNING in orange



**You MUST choose Unsubscribe here in the Mailchimp Lightning Web Component to manually unsubscribe the contact.**

Once that is done you can see that the subscription has been updated..



Once you click on Manage Subscriptions you can see that Jane Austen is now unsubscribed from our Blaze your Trail Audience (and was never subscribed to our Test Audience). You can also see that she has been removed from three Groups (in the diagram above this is under Interests). In the Mailchimp Lightning Web Component below the three groups are checked (as unsubscribed).

Warning: This Contact has been opted out of email in Salesforce. This page will only allow unsubscribes in Mailchimp.

### Audiences

Blaze Your Trail	Unsubscribed
Test	Not Subscribed

### Groups

Unsubscribe me from news about	
<input checked="" type="checkbox"/>	Salesforce Innovation
<input checked="" type="checkbox"/>	Fundraising Inspiration
<input checked="" type="checkbox"/>	Alumni Stories

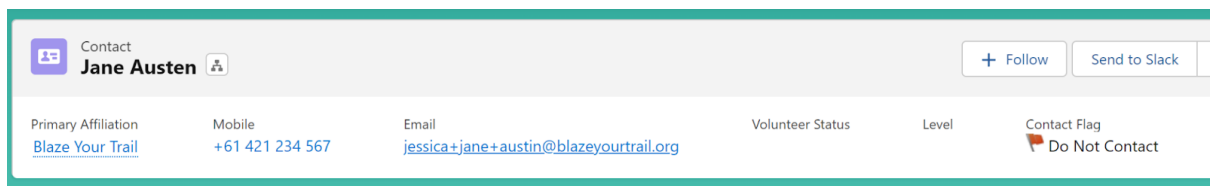
### Tags

<input type="checkbox"/>	Partners
<input type="checkbox"/>	Salesforce Users
<input type="checkbox"/>	volunteers
<input type="checkbox"/>	Winter 23
<input type="checkbox"/>	Salesforce Staff
<input type="checkbox"/>	Fundraising
<input type="checkbox"/>	Mother's Day
<input type="checkbox"/>	Current Active Status Project

## Contact Flag field

The Contact Flag field is a custom field that acts as a visual cue to alert Users that the Contact has 'Do Not Contact' checked on their record and they should not be phoned or emailed. The field is set up to display a 'Green Flag' if 'Do Not Contact' is NOT checked, meaning the Contact is 'OK to Contact' and will display a Red Flag if the 'Do Not Contact' checkbox IS checked meaning that they should not be contacted via any means.

The field can be placed in the Communication Preferences section but can also be included in the Compact Layout for a visual cue at the top of the page.



Here is how you create the formula field on Contact and this is the formula:

**IF ( npsp\_\_Do\_Not\_Contact\_\_c = TRUE, IMAGE("/img/samples/flag\_red.gif", "Red Flag") & " " & "Do Not Contact", IMAGE("/img/samples/flag\_green.gif", "Green Flag") & " " & "OK to Contact")**

SETUP > OBJECT MANAGER

**Contact**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

**Custom Field Definition Detail** [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

**Field Information**

Field Label	Contact Flag	Object Name	Contact
Field Name	Contact_Flag		
API Name	Contact_Flag_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Kirsten Finger, 22/7/2022, 1:41 pm	Modified By	Kirsten Finger, 22/7/2022, 1:48 pm

**Formula Options**

Data Type	Formula
IF	( npsp__Do_Not_Contact__c = TRUE, IMAGE("/img/samples/flag_red.gif", "Red Flag") & " " & "Do Not Contact", IMAGE("/img/samples/flag_green.gif", "Green Flag") & " " & "OK to Contact")

# Mailing Addresses

How is a deceased contact excluded from direct mail lists?

**Blaze your Trail**

Blaze Your Trail Home Accounts Campaigns Contacts Cases Contact Merge Chatter More

**Campaign** **Ask Us Anything - Free Salesforce Support** [Edit](#) [Clone](#) **Household Mailing List**

Type	Status	Start Date	End Date
Conference	In Progress	1/6/2022	

**Details** Related Activity Quick Links

Campaign Owner Jessica Macpherson	Leads in Campaign 0
Campaign Name Ask Us Anything - Free Salesforce Support	Converted Leads in Campaign 0
Campaign Record Type Volunteer Campaign	Contacts in Campaign 124
Active <input checked="" type="checkbox"/>	Responses in Campaign 103
Type Conference	Num Sent in Campaign 0
Status In Progress	Parent Campaign
Start Date 1/6/2022	

**Campaign Members**

Number of Members

124

19 40 63

[View All](#)

When you run the Household Mailing List report from a Campaign Record, this uses a Report called NPSP Campaign Household Mailing List V2 and this Lists addresses for a mailing campaign, avoiding household duplicates.

**Be sure to check the filters on this report and ensure that Deceased = False**

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*Last Updated 11 March 2023.*