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

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 ⓘ	Subscribed	Newsletter Opt In	☑
MC Subscriber	jessica+jane+austin@blazeyourtrail.org - Blaze Your Trail	Do Not Call	☐
Email Opt Out	☐	Deceased ⓘ	☐
Fax Opt Out	☐	Do Not Contact ⓘ	☐
		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.

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.

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.

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.

CONTACT > JANE AUSTEN
Mailchimp Subscriptions

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

Audiences

| Blaze Your Trail | Subscribed Unsubscribe |
| Test | Not Subscribed |

Groups

Unsubscribe me from news about

☐ Salesforce Innovation

☐ Fundraising Inspiration

☐ Alumni Stories

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.

Tags

Add Tag

☐ Partners
☐ Salesforce Users
☐ volunteers
☐ Winter 23
☐ Salesforce Staff
☐ Fundraising
☐ Mother's Day
☐ Current Active Status Project

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) ***

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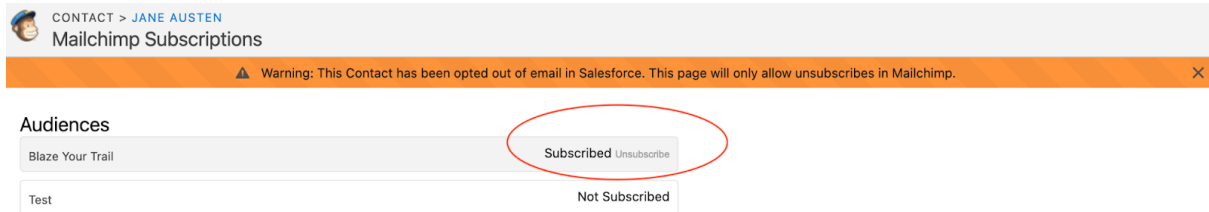
You MUST choose Unsubcribe here in the Mailchimp Lightning Web Component to manually unsubscribe the contact.

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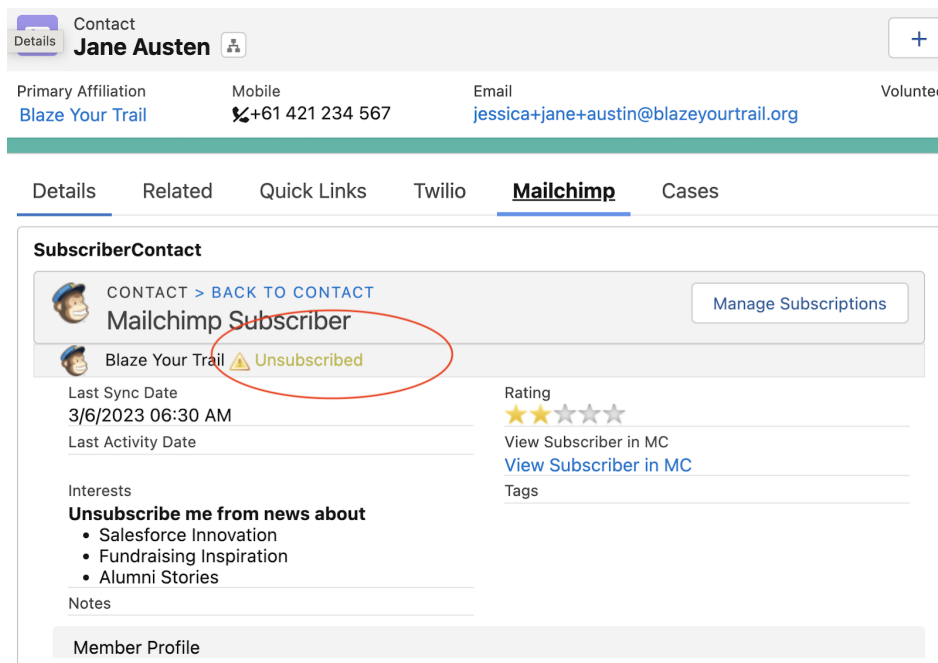
Once you click on Manage Subscriptions you can see that Jane Austen is now unsubscribed from our Blaze your Trail Audience (and was never subscribed to our Test Audience). You can also see that she has been removed from three Groups (in the diagram above this is under Interests). In the Mailchimp Lightning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

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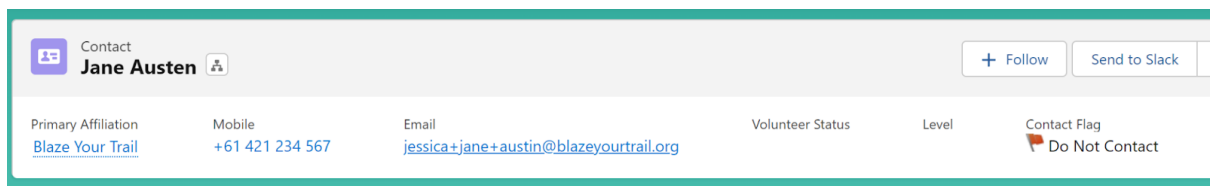
Here is how you create the formula field on Contact and this is the formula:

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")

Mailing Addresses

How is a deceased contact excluded from direct mail lists?

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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