**Updated Marketing Preferences - Feature**

The motivation around this feature is to provide more up to date and relevant ways of communication which includes social media. In addition to this, the feature will allow for capturing this information and also more contextual information surrounding preferred contact day. There is some light functionality using business rules added which add minor error checking for where the preferred contact method is selected, depending on field type, the field becomes mandatory or displays an error if ‘no’ is applied. All standard features surrounding email and bulk email remains unchanged.

**What would this add to the standard schema/solution?**

What this would allow for is to be able to segment the standard marketing lists based on these fields for targeted social media campaigns, providing more direct-channel marketing as well as other methods (e.g. omni channel marketing which can include social media and these fields)

It will allow for specific targeted campaigns for days of the week, to also report on how many customers prefer being communicated to and when and improve marketing campaigns based on an actual customer base (this can be segmented for further analysis for specific account, contact and lead campaigns).

It also adds error checking, e.g. if a customer has a contact method down as Twitter, but no data is in the Twitter ID field, or if it is set to Phone, but Phone is set to ‘No’ (i.e. don’t contact via phone) it highlights this to the user for them to review and update.

**Mapping Table**

|  |  |  |
| --- | --- | --- |
| Field Name | Type | Notes |
| Contact Method | Option Set | OOTB type / Extended or replaced to include Twitter, LinkedIn and Facebook |
| Email | Bool | OOTB type |
| Bulk Email | Bool | OOTB type |
| Phone | Bool | OOTB type |
| Fax | Bool | OOTB type |
| Mail | Bool | OOTB type |
| Twitter ID | Single line of text | OOTB type (Twitter) |
| Linkedin URL | Single line of text |  |
| Facebook | Single line of text | OOTB type (Facebook) |
| Preferred Contact Day | Optionset | Option Set to include Weekends, Weekdays, Saturday, Sunday, Monday, Tuesday, Wednesday, Thursday Friday |

**Considerations and Future Iterations**

Consideration needs to be given for any changes third party applications add or use to the marketing preferences (research point)

Consideration should be given to social profiles and support for social media that way and how Microsoft Social Engagement interacts with CRM.