



Entering Mailing Options

Purpose – To provide basic overview of mailing fields for used for contact communications.

Tip: Check with your volunteer advisor if you have any questions about how your nonprofit selects its mailing options. There are many variations in how your Salesforce administrator may set up reports to generate mailing lists.

Common mailing situations:

Example – Your printer is included in your database for reference purposes, but is never mailed a newsletter or solicitation.

Example – A state agency or individual ‘complimentary; member receives your newsletter, but no solicitations.

Example – Some corporations or individual ‘life members’ may never receive ‘membership solicitations’.

1. Mailing preferences can be edited within the Contact record in two locations:
 - a. Within this Mailing Category in the ‘Contact Information’ section by using the arrow buttons to shift options to and from the ‘Selected’ list.

The screenshot shows the 'Contact Edit' form in Salesforce. The 'Mailing Category' dropdown is expanded, showing options: 'Available', 'No membership solicitation', 'No solicitation', and 'No organizational mail'. The 'Selected' list is currently empty.

- b. And/or checking the ‘Do Not Mail’ button in the Mailing & Contact Information’ Section.

The screenshot shows the 'Address Information' section of the Salesforce form. The 'Do Not Mail' checkbox is checked.

- c. It saves time to complete the preferred phone, fax and email address sections and the primary and secondary address fields for all options known at the same time mailing fields are edited.
 - d. Click on the ‘save’ button to complete your selections.

