

The **Contact Update Request** package is designed to help Salesforce customers efficiently maintain accurate and up-to-date contact information – straight from the source. It allows users to trigger update requests directly from Contact records or list views, sending personalized emails that guide contacts to a secure, branded web form where they can validate and correct their details.

This guide walks Salesforce administrators through every step of installing, configuring, and customizing the package, including:

- Package installation via the AppExchange
- Site setup and exposure of Visualforce pages
- Email template and merge field configuration
- Page layout and button deployment
- Mass update functionality via list views
- Custom styling and field exposure

It also includes optional enhancements and best practices to ensure your implementation is both user-friendly and compliant with data governance standards.

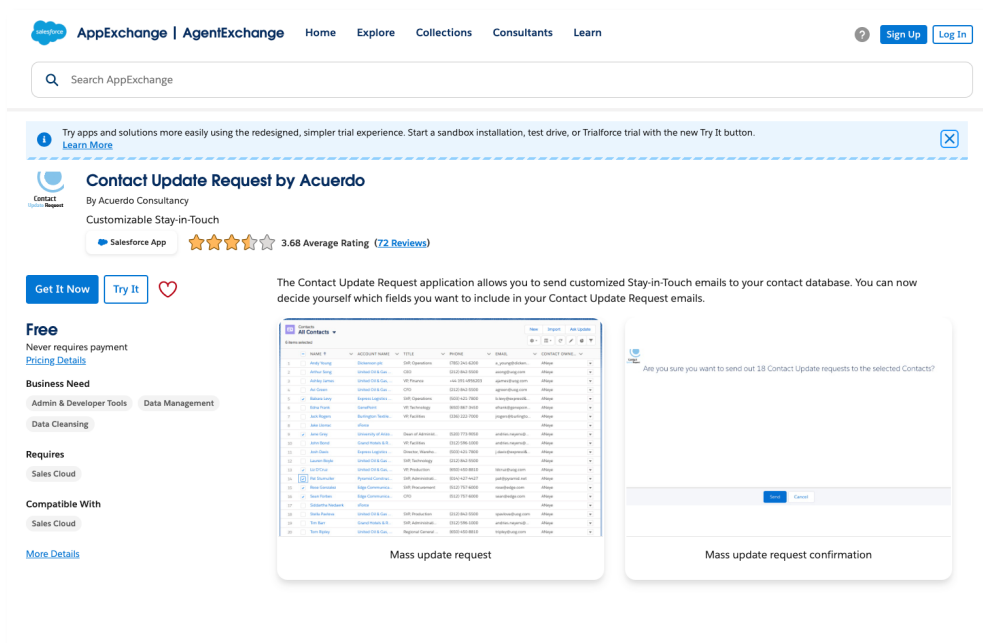
 Whether you're rolling this out in a sandbox or preparing it for production, this document will serve as your go-to resource for a clean and effective deployment.

PACKAGE INSTALLATION	3
POST-INSTALLATION TASKS	3
Create a Salesforce Site	3
Step 1: Register a Force.com Domain (if not already done)	4
Step 2: Create a New Site	5
Step 3: Test the Site	6
Set Up an Organization-Wide Email Address.....	6
Step 1: Create the address	6
Step 2: Retrieve the Salesforce Record ID	7
Configure the Site URL in Custom Settings	7
Step-by-Step	7
Add the "Ask Update" Button to the Contact Page Layout.....	9
Steps to Send an Update Request:.....	10
Step 1: Trigger the Update Request	10
Step 2: The Contact Receives the Update Request	12
Step 3: Submission by the Contact.....	12
Step 4: Notification to the Owner of the record	13
Step 5: Manual Review and Account Handling.....	14
Final Step: Accept or Reject the Changes	15
Send Mass Contact Update Requests from the List View	16
Add the "Ask Update" Button to the Search Layout:	16
Steps to Send Bulk Update Requests:	16
Triggering Contact Update Requests via Flow	17
How It Works	17
Use Cases.....	17
Setup in Flow.....	18
CUSTOMISATIONS.....	18
Customizing the Contact Update Request Email Template	18
Step 1: Customize the Letterhead	19
Step 2: Customize the Email Template	19
Step 3: Adding Extra Merge Fields to the SiT Email Template	20
Customizing the Contact Update Form (Visualforce)	21
Step 1: Copy the Original SiTForm Page or SiTResponsive Page.....	21
Step 2: Create a Custom Version of the Page	21
Step 3: Add or Remove Fields as Needed	21
Example: Add a Custom Field.....	21
Step 4: Use the Custom Page in Your Site.....	22
Tips for Styling & Layout	22
TESTING & TROUBLESHOOTING SECTION	22

Package Installation

You can install the **Contact Update Request** package directly from the AppExchange:

👉 [Install from AppExchange](#)



1. On the AppExchange listing page, click **Get It Now** to install in a **Production** org, or select **Try It Now** to install in a **Sandbox**.
2. You'll be redirected to the Salesforce installation wizard.
3. During **Step 2** of the wizard, choose **"Install for All Users"** to ensure the appropriate users – including Contact Owners – have access to the app's features.

Post-Installation Tasks

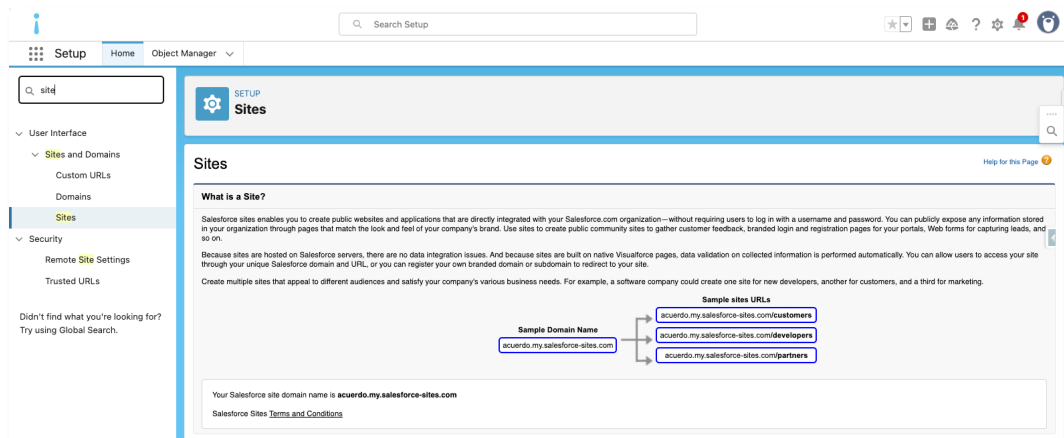
After the package has been installed, there are a few configuration steps you'll need to complete before the application is fully ready to use.

Create a Salesforce Site

The **Salesforce Site** (force.com Site) acts as the public-facing interface for your contacts to view and update their information securely outside Salesforce.

This step is required to expose the prebuilt Visualforce page included in the Contact Update Request package.

Step 1: Register a Force.com Domain (if not already done)



If your org hasn't registered a Force.com domain yet:

1. In **Setup**, go to **User Interface** → **Sites and Domains** → **Sites** (or just type "Sites" in Quick Find).
2. Click **Register My Domain**.
3. Enter a unique domain name for your organization (e.g., acuerdo.my.salesforce.com).
4. Submit and wait for domain registration to complete (can take a few minutes).

⚠ You can only register this once per org. Choose wisely.

Step 2: Create a New Site

Site Edit Save Cancel

Site Edit

Site Label: ⓘ

Site Name: ⓘ

Site Description:

Site Contact: ⓘ

Default Record Owner: ⓘ

Default Web Address: ⓘ

Active: ☒ ⓘ

Active Site Home Page: ⓘ (Preview)

Inactive Site Home Page: ⓘ (Preview)

Site Template: ⓘ

Site Robots.txt: ⓘ

Site Favorite Icon: ⓘ

Analytics Tracking Code: ⓘ

URL Rewriter Class: ⓘ

Enable Feeds: ☐

Clickjack Protection Level: ⓘ

Lightning Features for Guest Users: ☒ ⓘ

Enable Content Sniffing Protection: ☒ ⓘ

Enable Browser Cross Site Scripting Protection: ☒ ⓘ

Referrer URL Protection: ☒ ⓘ

Allow only required cookies for this site: ☐ ⓘ [More Details](#)

Redirect to custom domain: ☐ ⓘ

Cache public Visualforce pages: ☒ ⓘ [More Info](#)

Guest Access to the Support API: ☐ ⓘ

Save Cancel

1. In **Setup**, go to **User Interface** → **Sites and Domains** → **Sites** again.
2. Scroll down and click the **New** button to create a site.
3. Fill in the **Site Edit** form:

Field	Value
Site Label	Contact Update Request
Site Name	Contact_Update_Request
Site Contact	(Choose a system admin or relevant user)
Default Web Address	(auto-generated based on Site Name)
Active Site Home Page	Click the magnifying glass and select either SiTForm or SiTResponse (these were installed with the package)

4. Check **Active** to enable the site.
5. Click **Save**.

Step 3: Test the Site

1. Once saved, you'll see the **Site Details** page.
2. Click the **Secure Web Address** link (e.g., <https://acuerdo.my.salesforce-sites.com/contact>).
3. Ensure the Visualforce page loads correctly without authentication prompts.

✅ If the page loads without errors, congrats! Your site is ready to use.

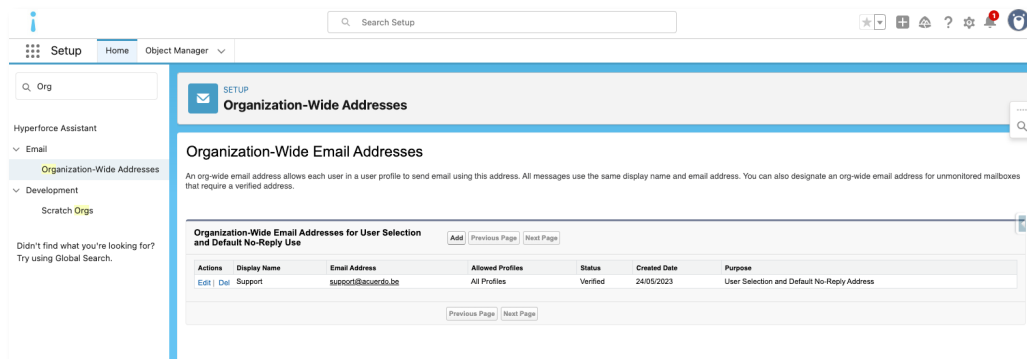
4. **Copy the Secure Web Address** – you'll use this URL in communications to contacts, links in emails, etc.

Optional Suggestions

- **Add Error Pages:** Customize your site's "Under Construction" or error pages under the "Site Visualforce Pages" section.
- **Enable HTTPS Only:** Ensure the site enforces HTTPS for secure data exchange.

Set Up an Organization-Wide Email Address

To send system-generated emails (like contact update requests validations) using a consistent and verified sender address, configure an **Organization-Wide Email Address**.



Step 1: Create the address

1. In **Setup**, go to:
Email → **Organization-Wide Addresses**
2. Click **"Add"** to create a new email address.
3. Fill in the form:
 - **Display Name:** No Reply (or something user-friendly like Acuerdo Contact Updates)
 - **Email Address:** noreply@yourcompany.com (*replace with your real domain*)
 - **Allow All Profiles to Use This From Address:** ✅ (*recommended for packages or automated emails*)
4. Click **Save**.

2. In the list, find the custom setting called **SiT_Setting** and click **Manage** next to it.
3. On the next screen, click **New** to create a new setting instance.
4. In the form:
 - Paste the URL of your public site (e.g. <https://acuerdo.force.com/contact>) into the **Form Url** field.
 - Paste the Org wide email address into **OrgWideEmailAddressId**
 - Optionally, set the **OwnerId**: Paste the **15- or 18-character Salesforce User ID** (starts with 005) of the user who should own the requests.

Example: 0055g000001XYZAA0

- If you provide a valid **User ID**, all updated data will be sent to that user.
- If left **blank**, the **Contact's existing owner** will be used instead.

Optional, set the **Parameters**: A semicolon-separated list of **Contact field API names** (no spaces) that are not added out of the box. The following fields are added automatic and do not need to be defined in this field:

lastname;firstname;salutation;otherstreet;othercity;otherstate;otherpostalcode;othercountry;mailingstreet;mailingcity;mailingstate;mailingpostalcode;mailingcountry;phone;fax;mobilephone;homephone;otherphone;assistantphone;email;title;department;assistantname;birthdate;description

5. Click **Save**.

Important Notes:

- **SiT_Setting** is a **Hierarchical Custom Setting**, meaning you can define different values:
 - Globally (default org-wide)
 - Per Profile
 - Per User

⚠️ Salesforce will resolve the value by looking first at the user level, then profile, then default.

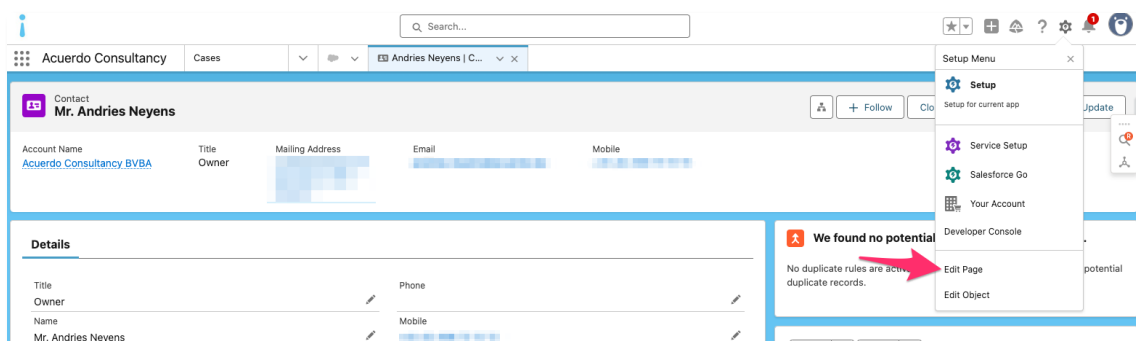
If you don't need user-specific behavior, just create one **default org-wide value**.

Add the "Ask Update" Button to the Contact Page Layout

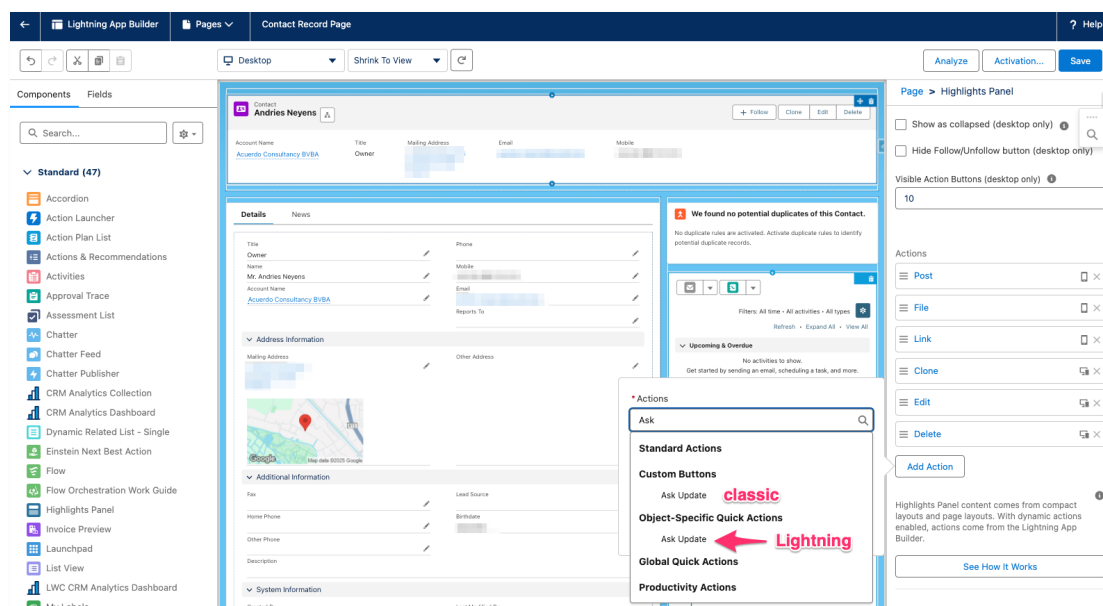
Once your email template and Contact Update Request functionality are configured, you can expose the feature to users by adding the **Ask Update** quick action to the **Contact Record Page**.

Steps to Add the Quick Action:

1. Navigate to a **Contact record** in your org.
2. Click the **gear icon** (⚙️) in the top right.
3. Select **Edit Page** to open the **Lightning App Builder**.



4. In the **Lightning App Builder**:
 - Locate the **Highlights Panel** (usually at the top of the page).
 - Click on it, then look in the **right-hand panel** for the **"Actions"** section.
 - Click **Add Action**.
5. Search for and select the **Ask Update** action (this is an **Object-Specific Quick Action** added by the package).



6. Save and **Activate** the page if needed.

If Your Org Uses Multiple Page Layouts

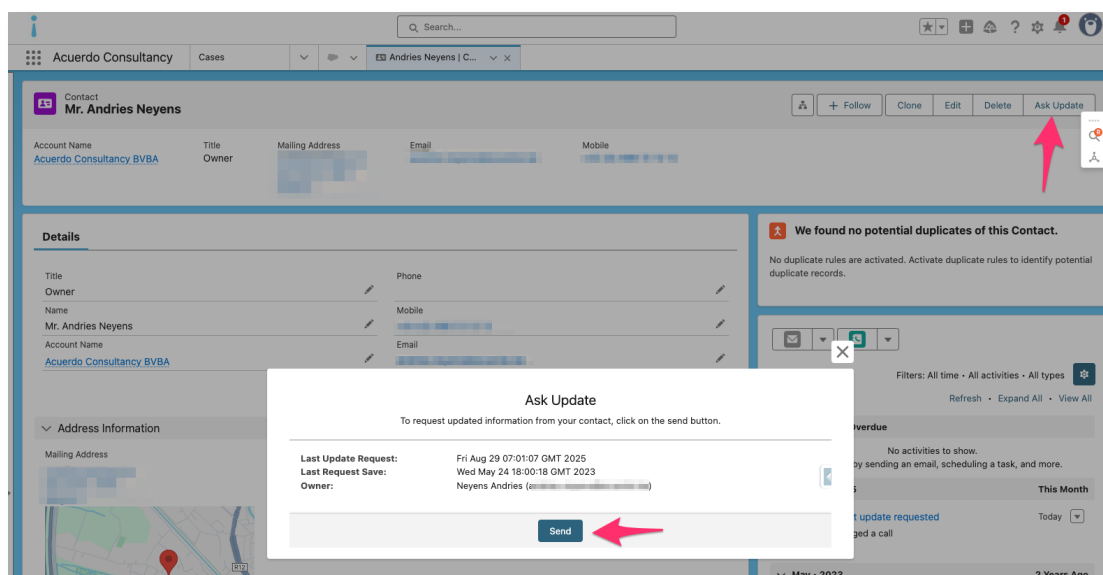
If you're still using **Classic Page Layouts** or supporting different layouts per record type or profile:

1. In **Setup**, go to:
Object Manager → **Contact** → **Page Layouts**
2. Edit each active layout and ensure the **Ask Update** button is added:
 - Go to the **Mobile & Lightning Actions** section.
 - Drag the **Ask Update** quick action into the **Salesforce Mobile and Lightning Experience Actions** section.
 - Save the layout.

Steps to Send an Update Request:

Once the button has been added to the **page layout** and/or **list view**, the feature becomes available to users – based on their profile and layout assignments.

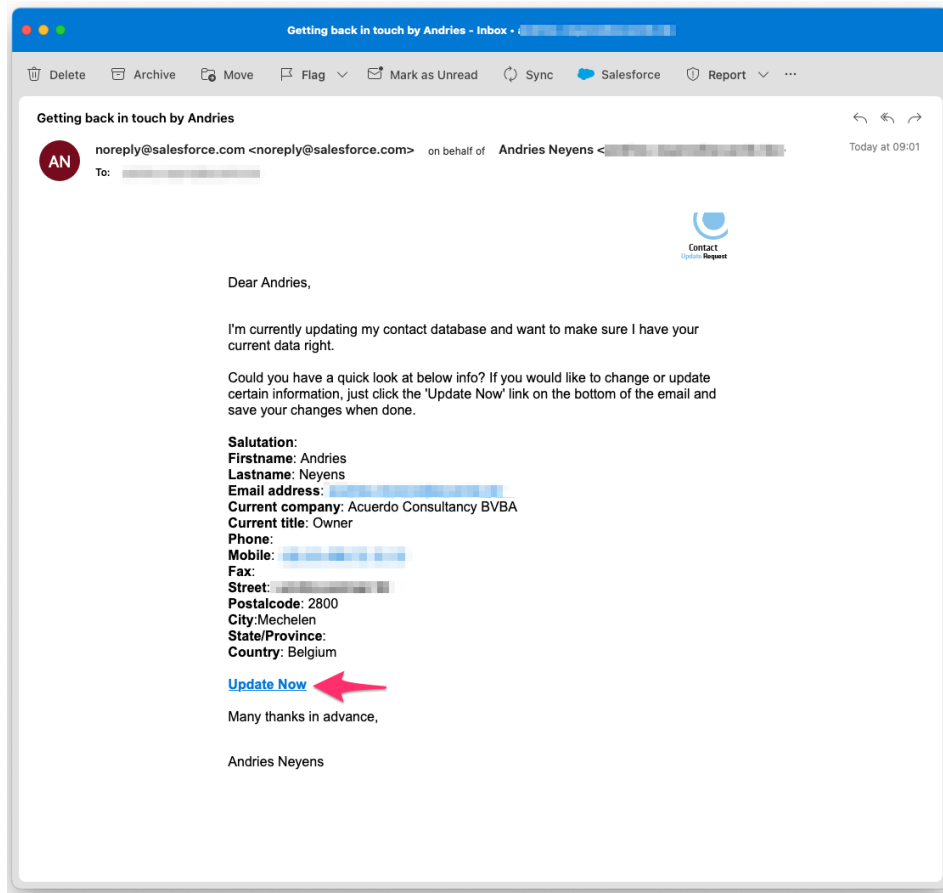
Step 1: Trigger the Update Request



1. Go to a **Contact** record.
2. Confirm the **"Ask Update"** button is visible (in the highlights panel).
3. Click the **Ask Update** button.
 - A confirmation window will appear.
 - Review the prompt and click **Send** to proceed.

The system will now send an update request email to the contact. You can modify this email with extra fields and own company style.

Step 2: The Contact Receives the Update Request



1. The contact receives an email with a link labeled **"Update now"**.
2. Clicking the link opens a **Visualforce page** where they can:
 - View their current contact details
 - Update or correct any fields (based on the fields passed via settings)

This page is fully customizable. You can modify the layout and style using HTML and CSS inside the Visualforce page or via your own static resources.

Step 3: Submission by the Contact

Stay in touch

https://acuerdo.my.s...

Last name
Neyens

Email address

Date of Birth (mm/dd/yyyy)

Current Title
Owner

Home Phone

Mobile Phone

Street

Zip Code
2800

City
Mechelen

State/Province
--None--

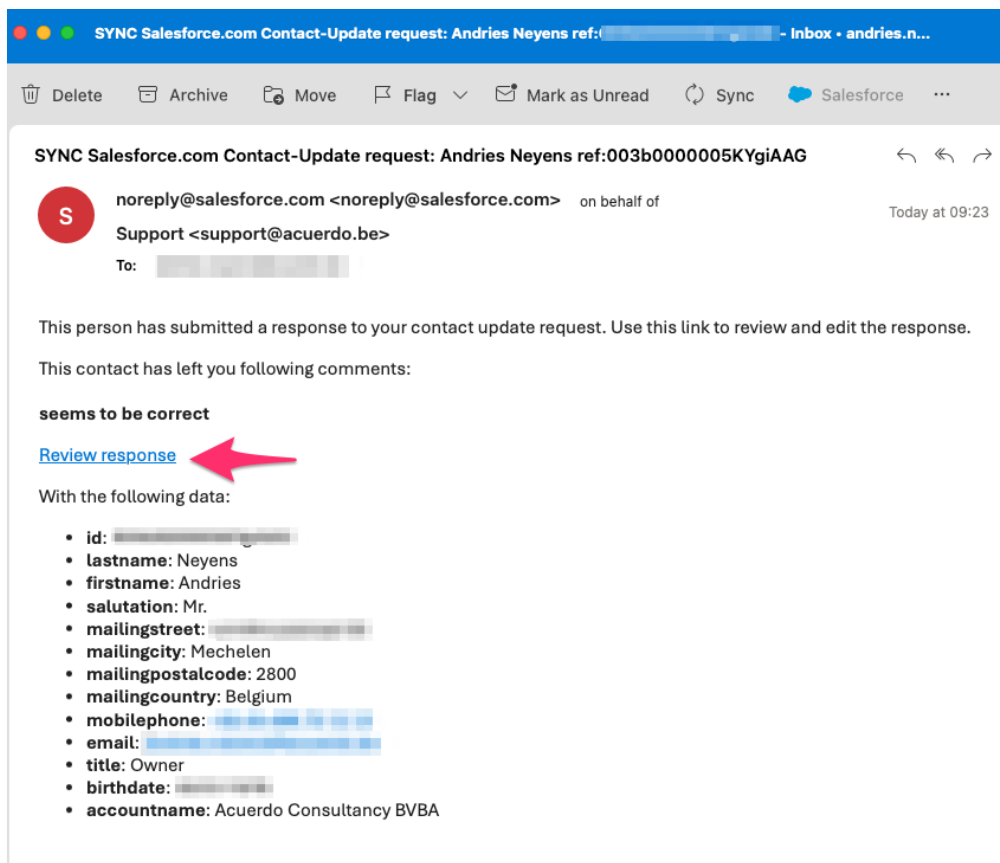
Country
Belgium

Comments
seems to be correct

Save changes

1. After filling in the form, the contact clicks **Submit**.
2. They are redirected to a simple **"Thank You"** confirmation screen.

Step 4: Notification to the Owner of the record



After submission:

- The assigned **Salesforce user** (either the Contact Owner or the default owner configured in SiT_Setting) will receive a **notification email**.
- This email contains:
 - A link to the updated Contact record
 - A summary of the **changes made by the contact**, with the updated fields clearly indicated (usually **bolded** for emphasis)

Step 5: Manual Review and Account Handling

Validate the user input Accept Changes Cancel

In the table below you can see the updated contact information of Andries Neyens. On the left side you can see the current value of all relevant fields, on the right side all updated values are listed.
 When a change has been made by Andries Neyens, the Save checkbox will be checked. Only those checked values will be used when accepting the changes.
 When the company name has been adapted by the contact, this will not automatically be saved. Do some research and attach that new or existing account in the standard interface.

Differences

FIELD	CURRENT VALUE	UPDATED VALUE	SAVE
Last Name	Neyens	Neyens	☐
First Name	Andries	Andries	☐
Salutation	Mr.	Mr.	☐
Mailing Street	[REDACTED]	[REDACTED]	☐
Mailing City	Mechelen	Mechelen	☐
Mailing Zip/Postal Code	2800	2800	☐
Mailing Country	Belgium	Belgium	☐
Mobile Phone	[REDACTED]	[REDACTED]	☐
Email	[REDACTED]	[REDACTED]	☐
Title	Owner	Owner	☐
Birthdate	[REDACTED]	[REDACTED]	☒
Account name	Acuerdo Consultancy BVBA	Acuerdo Consultancy BVBA	

Accept Changes Cancel

In some cases, the contact may update their **account information**, including changing the Account Name.

If the new account does **not** yet exist in Salesforce:

1. You'll need to **manually create** the Account.
2. Then, associate the Contact with the new Account.

Best Practice:

Before creating a new Account:

- Do a quick search in Salesforce to check for similar names or potential duplicates.
- This helps avoid creating duplicates due to slight spelling or formatting differences.

Afterward, complete any additional Account fields as required by your internal policies.

Final Step: Accept or Reject the Changes

At this point, the **Contact Owner** (or assigned user) can:

- Accept the updates and **save** the Contact record with the new data.
- Or ignore the changes and **keep the original** values if the submission doesn't meet internal standards or looks suspicious.

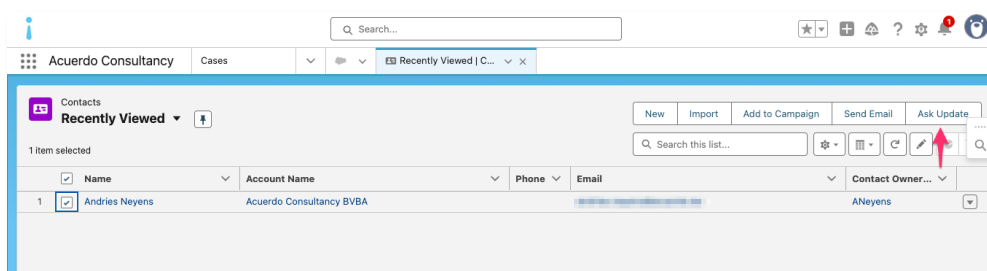
Send Mass Contact Update Requests from the List View

The **Mass Update Request** functionality allows you to trigger update requests for multiple contacts directly from a list view – much like the individual “Ask Update” action, but in bulk.

Add the "Ask Update" Button to the Search Layout:

1. Go to **Setup** → **Object Manager**.
2. Select **Contact** from the list of objects.
3. In the left-hand menu, click on **Search Layouts for Salesforce Classic** (yes, even if you're using Lightning – this is where list view buttons are managed).
4. Look for the row labeled **"Default"** under the **Search Layout Name** column.
5. Click the ▼ **dropdown** at the end of that row and select **Edit**.
6. In the **Buttons** section:
 - Find **Ask Update** in the **Available Buttons** list.
 - Move it to the **Selected Buttons** list using the arrow.
7. Click **Save**.

Steps to Send Bulk Update Requests:



1. Navigate to the **Contacts** tab in Salesforce.
2. Select a **List View** (e.g. **All Contacts**) and click **Go!** if required.
3. Use the checkboxes to select one or more contacts you want to send update requests to.

💡 You can select up to 200 records in Lightning Experience, depending on pagination and your org's settings.

4. Click the **Ask Update** button in the list view button bar (above the record list).
5. A confirmation page will appear:
 - It will show you how many contacts you selected.
 - It may include a summary of what will happen next.
 - Confirm your intent and proceed.

Notes:

- Make sure the selected contacts meet any internal criteria required by the update logic (e.g. valid email address, active status, etc.).
- The actual backend process (sending emails, setting flags) will depend on how the package handles the logic – e.g. via Flow, Apex, or Platform Events.

Triggering Contact Update Requests via Flow

In addition to using the **Ask Update** button on Contact records or list views, the **Contact Update Request** package supports programmatic triggers via **Flow**, using the `SiTActionEmail` Apex action.

This enables fully automated update requests based on any business logic – without user clicks.

How It Works

The package exposes an **Apex Invocable Method** called `SiTActionEmail.sendUpdateRequest`. You can call this from **Record-Triggered**, **Scheduled**, or **Autolaunched Flows**.

The screenshot shows the configuration interface for the 'Stay in touch: send a stay in touch email to a Contact' action within a Salesforce Flow. The interface includes the following elements:

- Header:** A back arrow, a blue square icon with a white 'L', and the title 'Stay in touch: send a stay in touch email to a Contact'.
- Label:** A text input field with a red asterisk and the label 'Label'.
- API Name:** A text input field with a red asterisk, the label 'API Name', and an information icon.
- Description:** A large text area for describing the action.
- Instructions:** A paragraph stating: 'Use values from earlier in the flow to set the inputs for the "Stay in touch: send a stay in touch email to a Contact" Apex action. To use its outputs later in the flow, store them in variables.'
- Set Input Values:** A section with a label 'ids' and an information icon, followed by a search input field with the placeholder 'Enter value or search resources...' and a magnifying glass icon.
- Included Toggle:** A toggle switch labeled 'Included' that is currently turned on.
- Show advanced options:** A dropdown arrow and the text 'Show advanced options'.
- Action Name:** The text 'Action Name: apex-AcuerdoCUR__SiTActionEmail' with an information icon.

Use Cases

-  **Scheduled Flow:** Automatically send update requests to contacts once a year.
-  **Owner Change:** Trigger a request when the Contact Owner changes.

- 🍌 **Contact Creation:** Immediately ask new contacts to verify or complete their details.
- 🧠 **Lead Conversion:** Send an update request after a Lead becomes a Contact.

Setup in Flow

1. In Flow Builder, add an **Apex Action** element.
2. Choose the class: `SiTActionEmail`
3. Select the method: `sendUpdateRequest`
4. Provide the required **Contact ID** as input.

Make sure the contact has a valid email address and the custom setting (`SiT_Setting`) is configured.

Customisations

All **customer-facing communication** in the Contact Update Request process can be fully customized to match your company's branding, tone, and data requirements.

This includes:

- **Email Templates** – Modify the subject, body content, branding (via Letterhead), and merge fields.
- **Update Form (Visualforce Page)** – Customize the layout, style (HTML/CSS), and fields shown to the contact.

These elements are designed to be flexible and extensible, allowing you to maintain full control over the user experience.

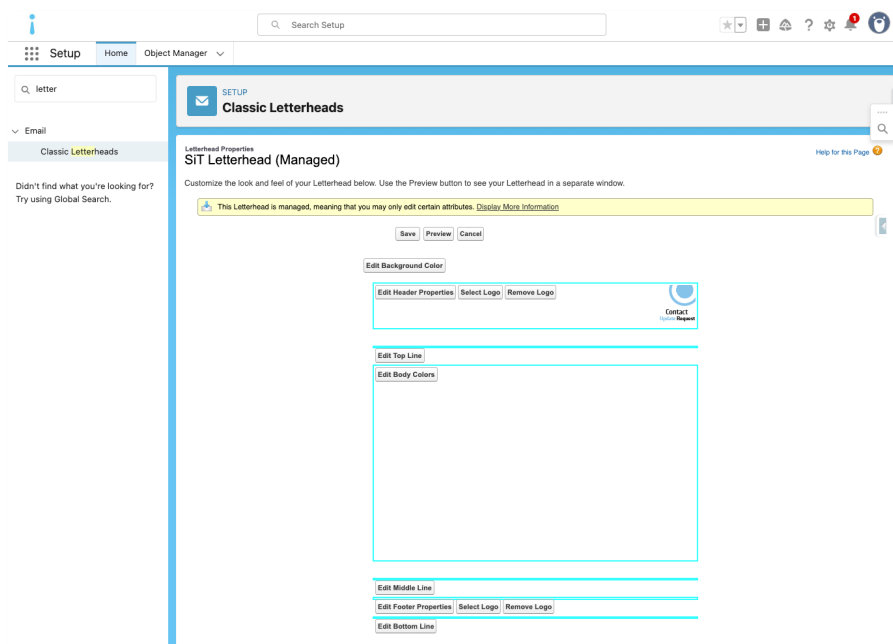
Note: Customizations require **administrator access** and, in some cases, basic knowledge of **HTML**, **CSS**, or **Visualforce**.

Customizing the Contact Update Request Email Template

After setting up your **Site** and configuring it in the **custom settings**, you can now tailor the **email appearance and content** that gets sent out for Contact Update Requests.

This package leverages standard Salesforce **Letterhead** and **Email Template** infrastructure.

Step 1: Customize the Letterhead



1. In **Setup**, go to:
Email → **Classic Letterheads**
2. Look for the Letterhead named **SiT Letterhead**.
3. Click **Edit Letterhead** to customize:
 - Add your company logo
 - Update colors, fonts, header/footer
 - Align the style with your branding

 [More info on customizing Letterheads](#)

Step 2: Customize the Email Template

1. In **Setup**, go to:
Email → **Classic Email Templates**
2. Locate the folder named **SiT**, and open the template called **SiT Email Template**.
3. Click **Edit HTML Version** or **Edit Text Version**, depending on the type.
4. You can now modify:
 - Subject line
 - Email body content
 - Merge fields
 - Call-to-action (e.g. "Click here to update your details")
 1. Highlight the phrase **"Click here to update your details."**
 2. Click the **Hyperlink icon** in the email editor toolbar.
 3. In the **URL** field of the popup:
 1. Paste the following merge field:
 2. `{!AcuerdoCUR__SiT_Email__c.AcuerdoCUR__Link__c}`

Important:

Remove the default `http://` that Salesforce pre-fills in the popup – otherwise your link will break.

Important: Use the Correct Merge Fields!

When inserting merge fields into the email:

- **Do NOT use Contact fields directly.**
- Instead, make sure you select **SiT Email Fields** as the **Field Type**.

⚠ Using incorrect merge fields (like directly from Contact) will result in blank values in the email!

Step 3: Adding Extra Merge Fields to the SiT Email Template

The **SiT Email** custom object comes with a few standard fields that can be used as merge fields in your email template.

If you want to use **custom fields from the Contact object**, you'll need to expose them via **formula fields** on the SiT Email object.

Why?

The email template uses the **SiT Email** record as its merge context, not the Contact directly.

So, if you want to use something like `Contact.Language__c` in the email, you must **mirror** it with a formula field on the SiT Email object.

How to Add a Custom Merge Field

Let's walk through an example of exposing `Contact.Language__c`:

1. Go to **Setup** → **Object Manager** → **SiT Email** (API name: `AcuerdoCUR__SiT_Email__c`)
2. Under **Fields & Relationships**, click **New**.
3. Select **Formula** as the field type, then click **Next**.
4. Enter a **Field Label**, e.g. `Contact Language`
(API name will default to something like `Contact_Language__c`)
5. Choose **Text** as the formula return type.
6. In the formula editor, click **Insert Field**.
7. Drill down into:
8. `Contact__r` → `Language__c`

Your formula should look like:

```
Contact__r.Language__c
```

9. Click **Next**, then **Save** the field.

Using Your New Field in the Email Template

Once the formula field is created, you can reference it in your email template like this:

```
{!AcuerdoCUR__SiT_Email__c.Contact_Language__c}
```

You can now insert that merge field wherever needed in the template – subject, body, footer, etc.

Repeat As Needed

Create one formula field per custom field you want to expose – this keeps things modular and admin-friendly.

Customizing the Contact Update Form (Visualforce)

⚠ Note: Customizing the update form requires **administrator privileges** and a basic understanding of **HTML, CSS, and Visualforce**.

Step 1: Copy the Original SiTForm Page or SiTResponsive Page

1. In **Setup**, go to:
Custom Code → **Visualforce Pages**
2. Locate the page named **SiTForm** (or **SiTResponse**, depending on which you're customizing).
3. Click the **Edit** link next to the page.
4. **Copy all of the source code** (Ctrl+A → Ctrl+C).

Step 2: Create a Custom Version of the Page

1. Return to the **Visualforce Pages** list.
2. Click **New** to create a new page.
3. Give your page a unique name (e.g. **CustomSiTForm**).
4. Paste the previously copied source code into the editor.
5. Click **Save**.

Step 3: Add or Remove Fields as Needed

The form uses dynamic field access via the `Contact.Fields` collection.

Example: Add a Custom Field

If your **Contact** object has a custom field called `Test_Number__c`, you can render it like this:

```
<label>Test Number</label>
<apex:inputText value="{!Contact.Fields['test_number__c']}" />
```

⚠ **Important:** Always use **lowercase** field API names inside the `Fields[]` map – otherwise, you'll get a runtime error.

⚠ **Important:** all extra fields you add there must be added to the **Parameter** field of the custom settings!

Step 4: Use the Custom Page in Your Site

After your custom Visualforce page is saved and working:

1. Go to **Setup** → **Sites**.
2. Edit the Site you created earlier.
3. Change the **Active Site Home Page** (or any page reference) from `SiTForm` to your new custom page (e.g. `CustomSiTForm`).
4. Click **Save**.

Tips for Styling & Layout

- Use `<apex:page showHeader="false" sidebar="false">` to control layout.
- Add your own CSS inline or via a `<style>` tag, or use a static resource for cleaner styling.
- You can even include JavaScript validation or conditional logic if needed.

Testing & Troubleshooting Section

Before rolling out to users:

- ✓ Test the form in an incognito browser (ensures it works without login)
- ✓ Ensure Org-Wide Email Address is verified
- ✓ Test email template with a known Contact
- ✗ Common errors:
 - Merge field not rendering? → Check that it exists on SiT Email as a formula
 - Custom field not updating? → Ensure it's added to the `Parameters` list in `SiT_Setting`