

## Manage Campaign Members <sup>[1]</sup>

May 17, 2024 by [Melanie Jones](#) <sup>[2]</sup>

Does a contact need to start (or stop) receiving a communication of yours?

1. ***If your Report or Data Extension is based on a Salesforce Campaign***, users can manage Campaign Members and create new Contacts when needed.
2. Those audience changes will be reflected the next time the corresponding Report is sent to or Data Extension is started.

It's a great way for users to continually manage small changes to an audience, without involving an eComm specialist.

**NOTE** When sending your email, you should be sending to either reports or data extensions <sup>[3]</sup>. Sending to a campaign will result in a CAN-SPAM violation. For this reason (among others) eComm specialists are responsible for initially creating Campaigns <sup>[4]</sup> and converting them to a Report or Data Extension as needed.

### **Find Campaign**

Managing Campaign Members is easy, once you figure out what Campaign is linked to your Report/Data Extension. For some this will be straightforward and others more convoluted - either way there are tricks to find the correct Salesforce Campaign. Your eComm specialist can also provide these details to you.

Salesforce Campaigns are always converted to Salesforce Reports and then may or may not be created in Marketing Cloud as a Data Extension, which can make finding the correct Campaign more difficult. There are numerous ways to find your Salesforce Campaign.

You may be able to easily find the Campaigns associated to the Report/Data Extension you use with a quick search in Salesforce. It could be clear as day which Campaign you should use, but if there is any confusion it is worth going through the steps below to 'back into the answer' by looking at the Report/Data Extension.

- 0:00 | View All Campaigns
- 0:40 | Search
- 1:12 | Use Report/Data Extension to find Campaign ID

## Data Extension

- Open the Data Extension (Marketing Cloud >> Email Studio >> Import >> select name) to find the Report name and/or Report ID.

The screenshot displays the Salesforce Marketing Cloud Email Studio interface. The top navigation bar includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', and 'A/B Testing'. The left sidebar shows a tree view under 'Interactions' with categories like 'Activities' (Data Extract, Report, File Transfer, Import, Query, Scripts, Filter, Data Factory Utility) and 'Messages' (Email, User-Initiated, Salesforce Sends, eComm - Continued E, eComm - User Onboal, zGuided Sends, Triggered Sends, Journey Builder Sends). The 'Import' option is highlighted. The main content area is titled 'Imports > 08 ECOM 20230216 Manage Camp'. It features a 'Properties' section with fields for 'Name' (08 ECOM 20230216 Manage Camp), 'External Key' (08 ECOM 20230216 Manage Camp\_1), and 'Description' (08 ECOM 20230216 Manage Campaign Session). Below this is the 'Source' section, which includes 'File location' (Salesforce Objects & Reports) and 'Destination Information (not editable)' (This Salesforce Import currently maps 00O5G000008e3fcUAA to the C). The 'Import Action Settings' section shows 'Update Type' set to 'Overwrite'.

## Report

### Open Report (two options)

- Login into Salesforce >> Open any Report >> Paste Report ID from above in the URL (similar character section) or use URL below
  - [https://cuecomm.lightning.force.com/lightning/r/Report/\[5\]PLACE ID HERE/view](https://cuecomm.lightning.force.com/lightning/r/Report/[5]PLACE ID HERE/view)

## Report Filters

- Find a filter with 'Campaign ID' or 'Campaign Name' in the Report\*

[eComm](#)[Home](#)[Chatter](#)[Reports](#) ▼[Campaigns](#) ▼[Dashboards](#) ▼

Report: Campaigns with Contacts

## 08 ECOM 20230216 Manage Campaign Session

CU President eNews

Total Records

2

	Contact ID ▼	Campaign Name ▼	First Name ▼	Last Name ▼
1	003f400000mJOpF	08 ECOM 20230216 Manage Campaign Session	Melanie	Jones
2	003f400000zJW2E	08 ECOM 20230216 Manage Campaign Session	Albert	Einstein

\*If this line doesn't exist in your Report, it's not based on a Campaign and therefore you cannot add/remove Campaign Members. You can however ask your eComm specialist for a Report based on a Campaign so you can make small audience changes. You would send emails to two Reports/Data Extensions .

### Campaign

- Replace the Campaign ID into the existing URL (similar character section) or use URL below
  - [https://cuecomm.lightning.force.com/lightning/r/Campaign/\[6\]PLACE ID HERE/view](https://cuecomm.lightning.force.com/lightning/r/Campaign/[6]PLACE ID HERE/view)

### Add Campaign Members

#### Add from Contact

- **Contacts Related List**
- **Global Search**
- **Search** the name in the top, Global Search
- **Click the Contact's Name**
  - *Often times, numerous Contacts are presented. You may need to open numerous*

Contacts and view their information to confirm it's the right person.



Q melanie



eComm

Home

Chatter

Reports



Campaigns



## Search Results

### Top Results

Campaigns

5+

Licenses

1

Contacts

5+

Reports

2

Email Sends

5+

Accounts

3

People

1



We searched for "melanie jon

## Contacts

5+ Results • Sorted by [Relevance](#) ▼

Name



Email

Melanie Jones

melani

Melanie Jones

meljon

Melanie Jones

mjone

melanie jones

meljon

Melanie Jones

## Reports

2 Results • Sorted by [Relevance](#) ▼

- Navigate to the **Related** tab
- Hover **Campaign History**
- The Campaign History pop-up will appear. Click the **Add to Campaign** button



Search...



eComm

Home

Chatter

Reports



Campaigns



Contact

**Melanie Jones**

Email (5) ▼

[melanie.jones@cu.edu](mailto:melanie.jones@cu.edu)

Email Opt Out



Employee ID

234558

Details

**Related**

UCB Email Prefs

UCD Email Prefs

Related List Quick Links



Related Accounts (1)



Affiliations (5)



Applications (1)



## Campaign History

10+ items • Sorted by Member Status Updated • Updated a few seconds ago

### Campaign Name

- |   |  |
|---|--|
| 1 | <a href="#">03_20220401_April First Friday with the School of Public Affairs</a> |
| 2 | <a href="#">08 EMPL 20220315 Open Enrollment Benefit-Eligible Employees</a>      |
| 3 | <a href="#">08 EMPL 20220314 HCM Community</a>                                   |
| 4 | <a href="#">08 EMPL 20220302 Currently Enrolled Emps</a>                         |

<https://cuecomm.lightning.force.com/lightning/r/Contact/003f400000mJOpFAAW/related/C>

- **Search** the name in the top, Global Search
- If the sole Contact is presented, you can hover **Campaign History** on the right.
- The Campaign History pop-up will appear. Click the **Add to Campaign** button



Search daniella e



eComm

Home

Chatter

Reports



Campaigns



## Search Results

### Top Results

Contacts

1

Accounts

1

Chatter

i

Campaigns

0

Licenses

0



We searched for "daniella erik"



**Daniella Erik**

*Recommended Result* • Contact

Email



## Campaign History

10+ items • Sorted by Member Status Updated • Updated a few seconds ago

Campaign Name

St

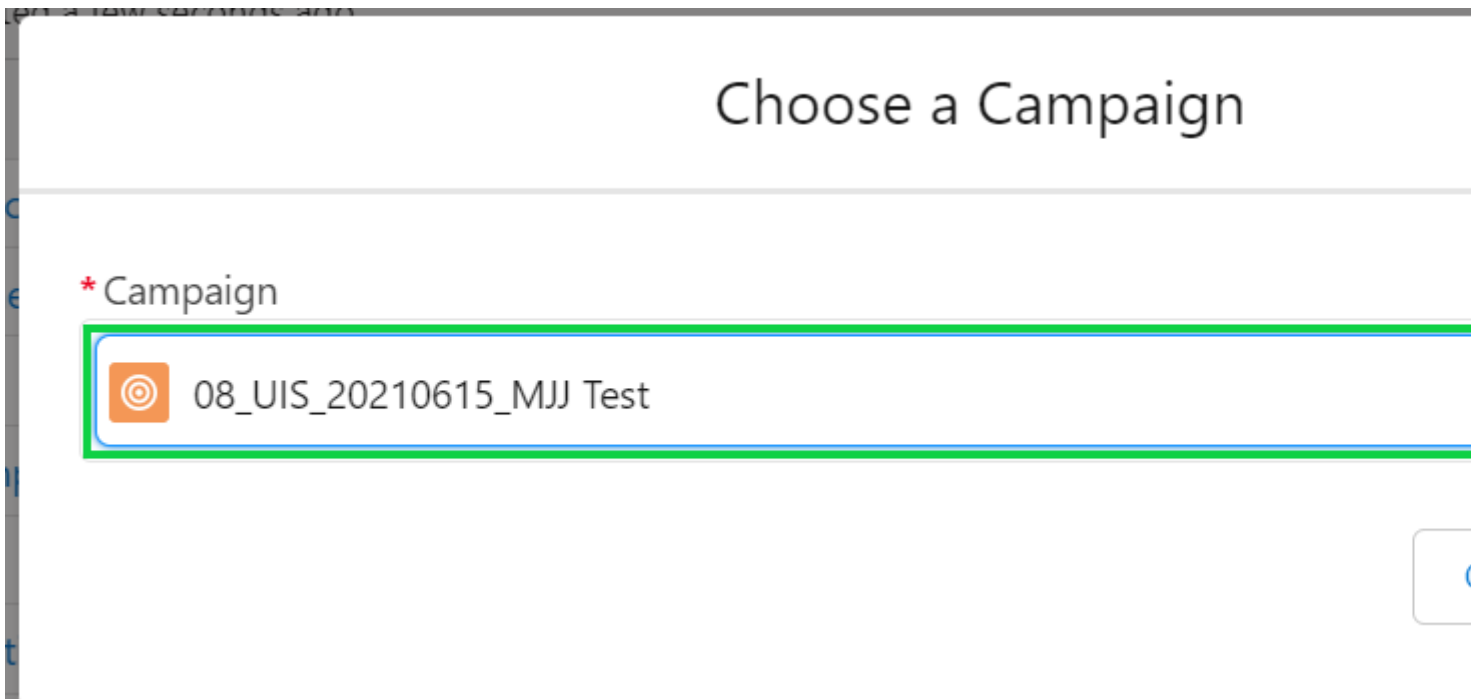
1

[01\\_ALUM\\_2](#)

2

[01 OIT CP 0](#)

- **Choose a Campaign**
- Click the blue **Next** button



Choose a Campaign

\* Campaign

08\_UIS\_20210615\_MJJ Test

Next

- The **Status** will automatically be set to a default but can be changed.
  - If you are not sure what the Status should be, leave it as '**Sent**'
- Click the blue **Save** button



## New Campaign Member

### Campaign Member Information

Campaign 08\_UIS\_20210615\_MJJ Test

Contact Daniella Eri

\* Status

Sent ▼

### Engagement Scoring Information

Scored Registered

Scored Attended

### Marketing Cloud Information

#### Add from Campaign

- **Open the Campaign** you want to add individuals to
  - *If you know the campaign name (or part of it) you can search at the top*
- Select the **Related** tab
- Click **Add Contacts** on the top right



eComm

Home

Chatter

Reports



Campaigns



Campaign

**08\_UIS\_20210615\_MJJ Test**



Type

Status

Start Date

End Date

Email

Planned

Details

**Related**



**Campaign Members (6+)**

**Type**

**First Name**

[Contact](#)

Bob

[Contact](#)

Daniella

[Contact](#)

Eric

Remember the email address column seen above may or may not be the email address your email is actually targetting. Learn more at 4:11 of the video above.

- Use the **Search** function to lookup a contact
- Select the **Contact(s)** you wish to add to the Campaign
- Click **Next**

eComm Home Chatter Reports Campaigns Dashboard

Search Contacts...

Jennifer Mortensen X Daniella Eri X

View All  
2 items selected

	Name	Email
+	Melanie Jones	melani
+	Melanie Jones	meljon

- Select the appropriate **Campaign Member Status**
  - If you are not sure what the status should be, leave it as **'Sent'**
- Save by clicking **Submit** on the bottom right

## Add to Campaign

### 2 Contacts Selected

\* Campaign



08\_UIS\_20210615\_MJJ Test

\* Member Status

Sent

Update existing campaign members?

- ☒ Keep member status
- ☐ Overwrite member status

## Remove Campaign Members

- **Open the Campaign** you want to remove individuals from
  - *If you know the campaign name (or part of it) you can search at the top*
- Select the **Related** tab
- Under the list of Campaign Members, select **View All**



Search...



eComm

Home

Chatter

Reports



Campaigns



Campaign

08\_UIS\_20210615\_MJJ Test



Type

Status

Start Date

End Date

Email

Planned

Details

Related



Campaign Members (6+)

Type

First Name

[Contact](#)

Bob

[Contact](#)

Daniella

[Contact](#)

Eric

[Contact](#)

Jennifer

[Contact](#)

Joshua

[Contact](#)

Katie

- Check the **box** next to the name of those you want to remove
- Click the **Remove** button in the top right



Search..



eComm

Home

Chatter

Reports



Campaigns



Campaigns > 08\_UIS\_20210615\_MJJ Test

## Campaign Members

2 items selected

	<input type="checkbox"/>	Type	First Name ↑	Last Name
1	<input type="checkbox"/>	Contact	Bob	G
2	<input checked="" type="checkbox"/>	Contact	Daniella	T
3	<input checked="" type="checkbox"/>	Contact	Eric	M
4	<input type="checkbox"/>	Contact	Jennifer	M
5	<input type="checkbox"/>	Contact	Joshua	H
6	<input type="checkbox"/>	Contact	Katie	T
7	<input type="checkbox"/>	Contact	Kayla	G
8	<input type="checkbox"/>	Contact	Melanie	J

- Click the blue **Remove** button in the pop-up to confirm this action.

## Remove Campaign Members

Are you sure you want to remove 2 selected members from this campaign?

### Add New Contacts

**Unable to find a contact in Salesforce to add to a Campaign?** When this occurs, the Contact needs to be created first.

#### Process

- Fillout the details below and when you 'Create New Contact' this page will refresh.
- You can then find them in Salesforce and add them as a Campaign Member to your particular Campaign with the instructions above. *It could take up to 2 minutes for the new Contact to appear in Salesforce.*

#### Tips

- **Provide a real First Name and Last Name** when possible; otherwise, leave the pre-populated text where First Name is *Friend* and Last Name is *of CU*
- New contacts should **not** have an email with a university domain (@colorado.edu, @cuanschutz.edu, @ucdenver.edu, @uccs.edu, @cu.edu, @cufund.org, etc). Contacts with a good email containing a university domain should already exist in Salesforce.

First Name

Friend

Last Name

of CU

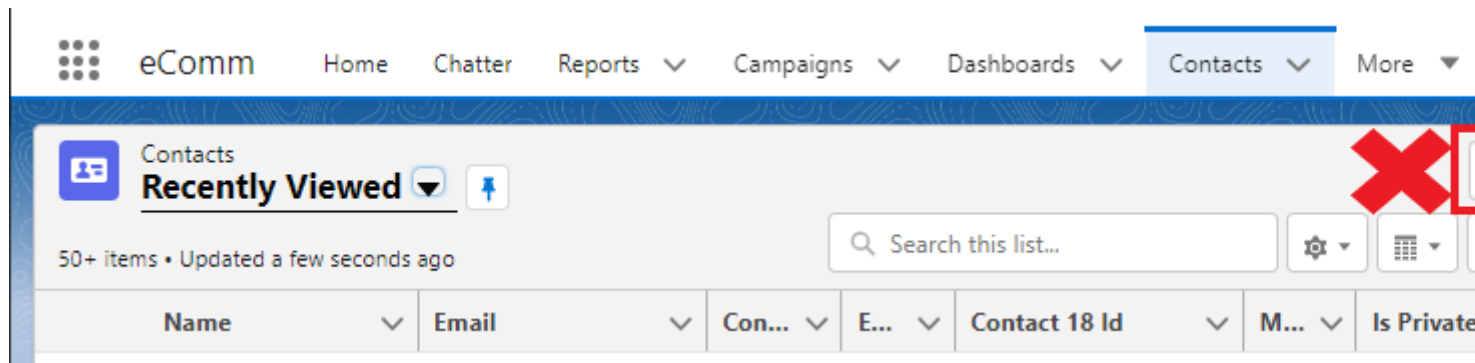
Email Address

Create New Contact

## Note

- If the email address is new to Salesforce, a new Contact will be created.
- If the email address already exists in Salesforce, a new Contact will NOT be created.

**NEVER create a new Contact directly in Salesforce.** These incorrectly created Contacts will automatically be deleted, undoing your work. Instead, follow the instructions above.



## Frequently Asked Questions

### Can I create my own audiences from scratch?

- No. New audiences will still need to be created by an eComm specialist with their turnaround times in mind. This is to ensure audience accuracy, including adhering to CAN-SPAM.

### I can't find the Campaign my eComm specialist made, that's linked to my Report/Data Extension. Should I make a new one?

- No. A new Campaign is considered a new audience. See above.

### Can I make mass changes to a Campaign?

- No. Mass changes to an existing Campaign will still need to be completed by an eComm specialist. The processes available to users are good for small changes (less than 20) but would be cumbersome for mass changes.

### Can I update Reports that are not based on a Campaign?

- No. Any updates to a Report will need to be made by an eComm specialist.
- No, but you could ask your eComm specialist for a Report based on a Campaign so you can make small audience changes. You would send emails to two Reports/Data Extensions .



## Related Content

- [What is the difference between a campaign and a report?](#) <sup>[7]</sup>
- [How are campaigns connected to reports?](#) <sup>[7]</sup>
- [Why do campaigns have such complicated names?](#) <sup>[8]</sup>
- [How do I modify or delete a campaign?](#) <sup>[9]</sup>
- [How do I add contacts to a Salesforce campaign in bulk?](#) <sup>[10]</sup>
- [Why can't I see a certain campaign?](#) <sup>[11]</sup>
- [How do I share a campaign with another user?](#) <sup>[11]</sup>
- [How do I share a campaign with a public group?](#) <sup>[11]</sup>

### Display Title:

Manage Campaign Members

### Send email when Published:

No

---

**Source URL:**<https://www.cu.edu/blog/ecommm-wiki/manage-campaign-members>

### Links

[1] <https://www.cu.edu/blog/ecommm-wiki/manage-campaign-members> [2] <https://www.cu.edu/blog/ecommm-wiki/author/39> [3] <https://www.cu.edu/blog/ecommm-wiki/sending-reports-vs-data-extensions-vs-campaigns> [4] <https://www.cu.edu/blog/ecommm-wiki/create-salesforce-campaign-and-add-campaign-members> [5] <https://cuecomm.lightning.force.com/lightning/r/Report/> [6] <https://cuecomm.lightning.force.com/lightning/r/Campaign/> [7] <https://www.cu.edu/blog/ecommm-wiki/salesforce-campaign-vs-salesforce-report> [8] <https://www.cu.edu/blog/ecommm-wiki/naming-conventions> [9] <https://www.cu.edu/blog/ecommm-wiki/modify-or-delete-salesforce-campaign> [10] <https://www.cu.edu/blog/ecommm-wiki/using-salesforce-apsona> [11] <https://www.cu.edu/blog/ecommm-wiki/salesforce-visibility-and-sharing>