Create Salesforce Campaign and Add Campaign Members
[1]

June 13, 2022 by Melanie Jones [2]

eComm specialists are responsible for creating audiences [3] in Salesforce and Marketing Cloud, which might include Campaigns.

NOTE When sending emails, you should be sending to either reports or data extensions [4]. Sending to a campaign will result in a CAN-SPAM violation. For this reason (among others) eComm specialists are responsible for initially creating Campaigns (instructions below) and converting them to a Report or Data Extension as needed. After that, users should be able to manage small changes to the Campaign by adding and removing Campaign Members [5].

APPLY YOURSELF

Those tasked with creating audiences [3] can apply the entire process as practice by cloning the eComm specialist Training Plan [6] (referenced below).

Create & Share Campaign

Campaign Naming Conventions

- **Campaign Name:** 08 UREL 20211010 Invitees
  - 08 = The first two numbers of a report name represent the **campus** on which it was created.
    - 01 = Boulder, 02 = Anschutz, 03 = Denver, 04 = Colorado Springs, 08 = System, 09 = Advancement
  - UREL = The next four letters of your report name represent the **unit** that owns the report, in this case, University Relations. You'll also come across examples like ALUM (for alumni association), HIST (for the department of history), and CHAN (for the Office of the Chancellor).
  - OT/DATE = The next component represents whether your campaign **one-time (OT) or the date you uploaded the information (YYYYMMDD)**.
  - Invitees = The next portion of your report name specifies the **audience**, in this case, invitees to an event.

Learn more about naming conventions. [7]

Create Campaign

- Clone
- Create from Scratch

In our Salesforce environment, we already have thousands of Campaigns. For that reason, it is most common for eComm specialists to clone an existing Campaign. Note that a cloned Campaign does not clone the members of that Campaign or the shared settings.

- Navigate to the **Campaign**
  - You could search for the Campaign with the **Global search** at the top
  - You could navigate to the **Campaigns tab** if you recently viewed the Campaign

- Modify the name of the Campaign
- By default:
  - Type=Email
  - Active=Checked
  - Status=Planned

- Click the blue **Save** button

- Select **Campaign** in the top navigation
- Click **New** in the top right corner

- Generic Campaign is set by default.
- Slect the blue Next button in the bottom right

New Campaign

Select a record type

◉ Generic Campaign
This is the starting template

○ Cvent Event
Used for cvent events

○ Subscription Form
Subscription lists from Form

- Enter the **Campaign Name**
- Click **Active** checkbox
- Select **Campaign Type**
  - **Email |** Use this type when you plan to send an email to this group.
  - **Other |** Use this type for campaigns you do not plan to email.
- Add additional information to the Campaign, like **Description** and **Start/End date**.
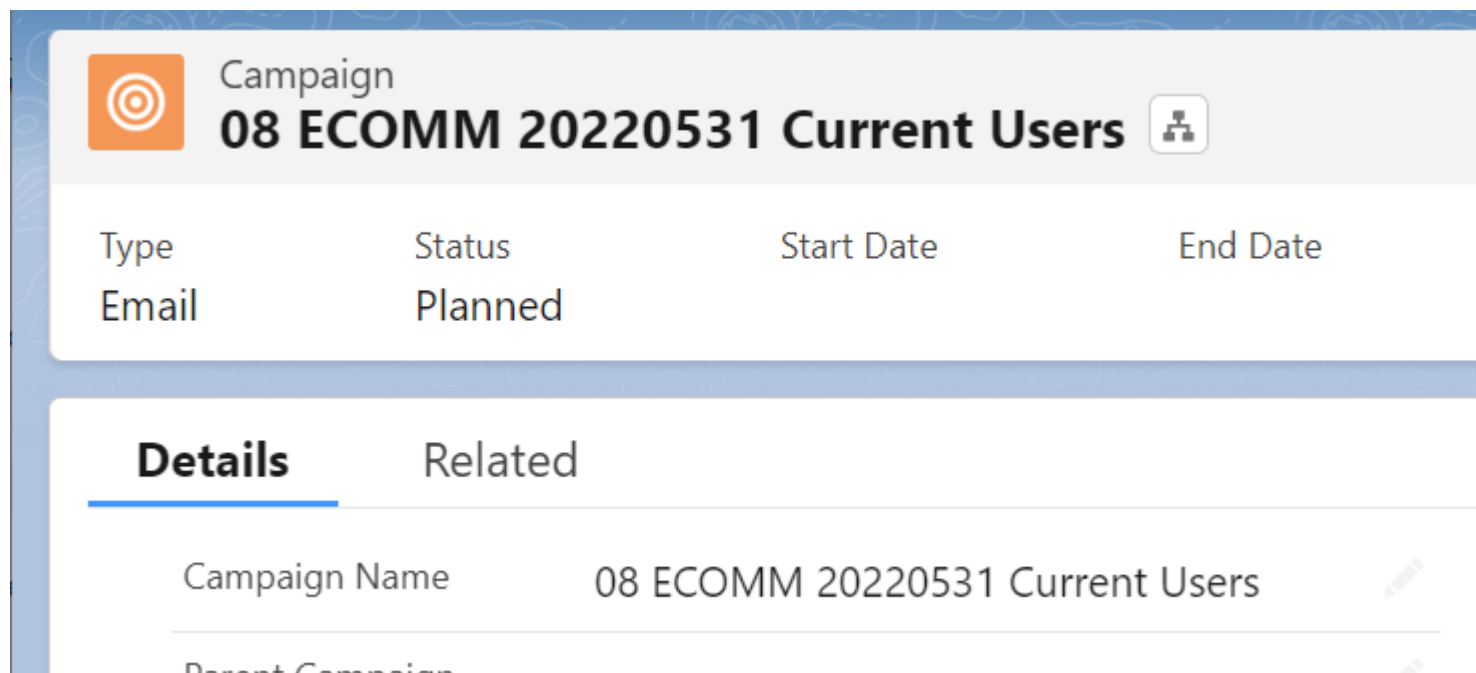- Select **Save**, the blue button in the bottom right

Share Campaign

SHARE CAMPAIGN Don't forget to share the Campaign with the Public Group or Individual User so they have access. Failure to do so will likely result in a failed send.

There are two ways to share a Campaign:

- Share Campaign (new)
- Share Campaign (old)

- Once a Campaign exists, click the **Sharing** button in the top right

- In the pop-up, it defaults to Users. **Click the down arrow** with the image of a person to select **Public Groups** in the dropdown.

Share

Search

Search User...

*Campaign Access

Read Only

Shared with 2 groups of users.   Edit
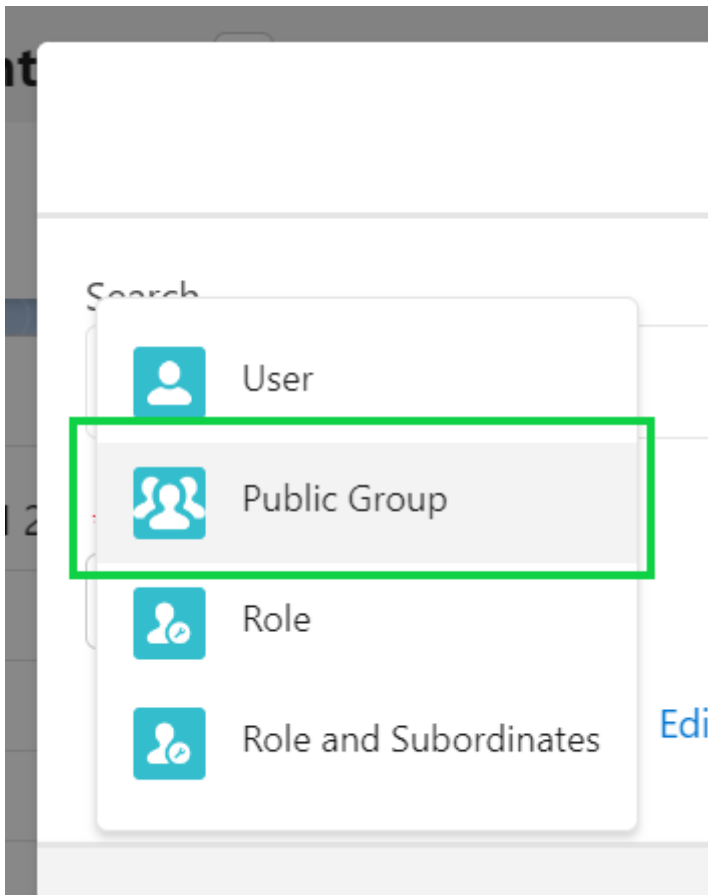
- **Search** for the name of the Public Group. **Click the Public Group name** once it appears.

Share

Search

arts

01 College of **Arts** and Sciences

01 Miramontes **Arts** & Sciences Program

03 College of **Arts** & Media

03 College of Liberal **Arts** and Sciences

04 College of Letters **Arts** & Sci

- Confirm the Public Group (or Users) selected are correct. Click the blue **Save** button.

Share

Search

👥 ▼ Search Public Group...

👥 01 College of Arts and Sciences ✕

* Campaign Access

Read Only ▼

Shared with 2 groups of users. Edit

- Click the **down arrow** next to Clone. Select **Sharing** in the dropdown.

- Chose the **Add New Permission** tab
- Search the Public Group or Individual name
- Grant **Read access**

Manage Campaign Members

When a list is provided, there is no telling the quality of the data provided. Lists require underlined varying amounts of 'cleanup' [8] that is best done before processing the list. Failure to 'cleanup' a list can cause technical issues when adding Campaigns Members in bulk with Apsona and/or make the process more fragmented and cumbersome for you.

Manage Campaign Members Individually

eComm specialists can <u>add & remove Campaign Members individually</u> [5]. Users can also add and remove Campaign Members and should be encouraged to do so. It's a great way to empower users to manage their audience after being created initially.

- *Walk through a test scenario (**Campaign 1**) by following along with the video above (**0:00-1:55**). Do not be shy about adding random folks to this Campaign and removing them to practice.*

Add Campaign Members in Bulk

It's most common for eComm specialists to <u>add Campaign Members in bulk via Apsona</u> [9].

- *Walk through a test scenario of matching on a single data point (**Campaign 2**) by following along with the video above (**1:56-6:55**). Complete the same process for the remaining tabs (**Campaign 3-7**).*
- *Walk through a test scenario of matching on numerous data points (**Campaign 8**) by following along with the video above (**6:56-13:39**). Then complete the same process for the remaining tab (**Campaign 9**).*

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. eComm specialist can create new contacts in bulk with <u>an upload process via Apsona</u> [10] or <u>individually with the same process users leverage</u> [5]. Once the Contact(s) exists, use Apsona to add the Campaign Members to the Campaign (above).

- *Walk through a test scenario (**Campaign 10**) by following along with the video above (**13:40-19:41**). Then complete the same process for the remaining tab (**Campaign 11**).*

Recorded Sessions

The following session took place in Nov. 2023 as a refresher for existing eComm specialists.

TEST YOURSELF eComm specialists and other audience creators - regardless of their previous experience - are highly encouraged to complete an extensive quiz to ensure a deep understanding of Campaigns / Campaign Members / Apsona annually. Please set aside 30-60 min. to <u>complete the quiz of 35+ questions</u> [11], many being open-ended. Do not miss the opportunity to review correct responses after submitting your answers to see how they match up for self-correction.

Related Content

- <u>What is the difference between a campaign and a report?</u> [12]
- <u>How are campaigns connected to reports?</u> [12]
- <u>Why do campaigns have such complicated names?</u> [7]

- How do I modify or delete a campaign? [13]
- How do I add an individual contact to a Salesforce campaign? [1]
- How do I add contacts to a Salesforce campaign in bulk? [14]
- How do I share a campaign with a public group? [15]

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