Manage Campaign Members \[1\]

October 31, 2022 by Melanie Jones \[2\]

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

- If your Report or Data Extension is based on a Salesforce Campaign, users can add and remove individuals from the Campaign.
- The next time the corresponding Report is sent to or Data Extension is re-started, those changes to the audience will be reflected.
- It's a great way for users to 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 \[3\]. Sending to a campaign will result in a CAN-SPAM violation. For this reason (among others) eComm specialists are responsible for initially creating Campaigns \[4\] and converting them to a Report or Data Extension as needed.

## Add Campaign Members

### Add from Contact

- Contacts Related List
- Global Search

- **Search** the name in the top, Global Search
- **Click the Contact’s Name**
  - *Oftentimes, numerous Contacts are presented. You may need to open numerous Contacts and view their information to confirm it’s the right person.*
- Navigate to the Related tab
- Hover Campaign History
- The Campaign History pop-up will appear. Click the Add to Campaign button
**Campaign History**

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

<table>
<thead>
<tr>
<th>Campaign Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>03_20220401_April First Friday with the School of Public Affairs</td>
</tr>
<tr>
<td>2</td>
<td>08 EMPL 20220315 Open Enrollment Benefit-Eligible Employees</td>
</tr>
<tr>
<td>3</td>
<td>08 EMPL 20220314 HCM Community</td>
</tr>
<tr>
<td>4</td>
<td>08 EMPL 20220302 Currently Enrolled Emps</td>
</tr>
</tbody>
</table>

https://cuecomm.lightning.force.com/lightning/r/Contact/003f400000mJOpFAAW/related/Campaigns
- **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
### Campaign History

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

<table>
<thead>
<tr>
<th>Campaign Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>01_ALUM_2</td>
<td></td>
</tr>
<tr>
<td>01 OIT CP 0</td>
<td></td>
</tr>
</tbody>
</table>
- Choose a Campaign
- Click the blue Next button

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
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
Remember the email address column seen above may or may not be the email address your email is actually targeting. 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**
- 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
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**
# Campaign Members (6+)

<table>
<thead>
<tr>
<th>Type</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Bob</td>
</tr>
<tr>
<td>Contact</td>
<td>Daniella</td>
</tr>
<tr>
<td>Contact</td>
<td>Eric</td>
</tr>
<tr>
<td>Contact</td>
<td>Jennifer</td>
</tr>
<tr>
<td>Contact</td>
<td>Joshua</td>
</tr>
<tr>
<td>Contact</td>
<td>Katie</td>
</tr>
</tbody>
</table>
- Check the box next to the name of those you want to remove
- Click the Remove button in the top right

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

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, @cuanschutz, @ucdenver, @uccs, @cu.edu, 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.

Related Content

• What is the difference between a campaign and a report? [5]
• How are campaigns connected to reports? [5]
• Why do campaigns have such complicated names? [6]
• How do I modify or delete a campaign? [7]
• How do I add contacts to a Salesforce campaign in bulk? [8]
• Why can’t I see a certain campaign? [9]
• How do I share a campaign with another user? [9]
• How do I share a campaign with a public group? [9]

Display Title:
Manage Campaign Members

Send email when Published:
No

Source URL: https://www.cu.edu/blog/ecomm-wiki/manage-campaign-members

Links
[1] https://www.cu.edu/blog/ecomm-wiki/manage-campaign-members
[7] https://www.cu.edu/blog/ecomm-wiki/modify-or-delete-salesforce-campaign
[8] https://www.cu.edu/blog/ecomm-wiki/using-salesforce-apsona