Published on *University of Colorado* (https://www.cu.edu)

Salesforce Campaign vs. Salesforce Report [1]



November 5, 2019 by jennifer.mortensen [2]

As an eComm user, you already know that Salesforce contains vast amounts of data on our constituents. This data is stored in many ways, but two of the most common that you'll encounter are campaigns and reports. So what's the difference, and how do reports and campaigns interact with each other?

Salesforce Campaigns | Salesforce Reports | Interaction between Salesforce Campaigns and Reports

Salesforce Campaigns

REMEMBER Although your audience members may be contained in a campaign, sends to campaigns are not permitted in eComm because they do not account for CAN-SPAM criteria based on federal legislation. Contact your eComm specialist [3]to have your campaign converted into a report so you can reach your audience while adhering to CAN-SPAM.

Salesforce campaigns are generally created when an audience can't be built based on data housed within Salesforce. Sound confusing? Here are a few examples.

- The president wants to invite donors who have contributed a certain dollar amount to a special event. Dollar-specific donor data isn't stored in Salesforce, so if you want to assemble a record of this group, you'll need to use a campaign instead.
- The alumni association wants to contact graduates who were part of a specific club on campus. Some club participation is currently stored in Salesforce, but most of it is not, including the club in this example. If you want to group these individuals together, you'd do so using a campaign.

Important Keys to Remember

Campaigns represent data at a single point in time; they won't automatically update (with the exception of Cvent event campaigns), so it's your responsibility to ensure that the list of members is up to date and maintained on a regular basis. You can handle adding campaign members one at a time [4], but your eComm Specialist [3] will need to assist if you want to add them in bulk.

How are Cvent Event Campaigns Different?

If you're a Cvent user, you'll be excited to know that your event is automatically integrated with Salesforce, so you're sure to capture all of the event data you need in a usable way for future outreach. Since event campaign data is based on an ongoing integration between Salesforce and Cvent, they do update automatically; no manual work is required. Event campaigns also contain additional information about your event as a whole, such as the number of people registered, the cost associated with the event (if any), etc.

Salesforce Reports

Salesforce reports are used when we have a reportable data point associated with a Salesforce contact, such as graduation year, campus of employment, major/minor, etc. Here are a few examples:

- Human Resources wants to send a communication to all active employees at CU Anschutz. This data is housed in the Salesforce employment object, so it is reportable.
- The alumni association wants to send a communication to alumni who graduated in 1980. This data is housed in the Salesforce education object, so it is reportable.

How do I view a report?

You can learn more about how to view a report in this short video [5].

How do I create a new Salesforce report?

Only eComm Specialists can create Salesforce reports given the complexity involved and the vast amount of data we have at our fingertips. If you need a new report for a communication, contact your eComm Specialist [3].

- I'm an eComm Specialist. Where can I access templates and training for report building? [6]

How can I modify an existing Salesforce report?

Only eComm Specialists can modify Salesforce reports given the complexity involved and the vast amount of data we have at our fingertips. If you need to modify a report for a communication, contact your eComm Specialist [3].

Interaction between Salesforce Campaigns and Reports

If you're sending emails in Marketing Cloud, you probably know that one of the rules for eComm users is that we NEVER send to campaigns (although we can use them as exclusions in our sends) since they don't contain required CAN-SPAM information to keep CU compliant with key federal legislation. So how do you send an email to a campaign, such as the donor event example above?

If you need to send a communication to a campaign, your eComm Specialist [3] will build a report based on your campaign so that you're able to target your audience appropriately. Your eComm Specialist will also ensure that your report based on the campaign contains the required CAN-SPAM compliant fields.

If you make any changes to your campaign, such as adding or removing campaign members, the report will update automatically.

Related Content

- How are campaigns connected to reports? [1]
- Why do campaigns have such complicated names? [7]
- How do I create a Salesforce campaign? [8]
- How do I modify or delete a campaign? [9]
- How do I add an individual contact to a Salesforce campaign? [8]
- How do I add contacts to a Salesforce campaign in bulk? [10]
- Why can’t I see a certain campaign? [11]
- How do I share a campaign with another user? [11]
- How do I share a campaign with a public group? [11]

Display Title:
Salesforce Campaign vs. Salesforce Report
Send email when Published:
Yes

Source URL:https://www.cu.edu/blog/ecomm-wiki/salesforce-campaign-vs-salesforce-report

Links
[1] https://www.cu.edu/blog/ecomm-wiki/salesforce-campaign-vs-salesforce-report
[2] https://www.cu.edu/blog/ecomm-wiki/author/13789 [3] https://www.cu.edu/ecomm/strategy/leadership
[4] https://www.cu.edu/blog/ecomm-wiki/manage-campaign-members
[5] https://www.youtube.com/watch?v=OdYhw7qa3oM&feature=youtu.be
[6] https://www.cu.edu/blog/ecomm-wiki/salesforce-reporting [7] https://www.cu.edu/blog/ecomm-wiki/naming-conventions [8] https://www.cu.edu/blog/ecomm-wiki/create-salesforce-campaign-and-add-campaign-members [9] https://www.cu.edu/blog/ecomm-wiki/modify-or-delete-salesforce-campaign
[10] https://www.cu.edu/blog/ecomm-wiki/using-salesforce-apsona [11] https://www.cu.edu/blog/ecomm-wiki/salesforce-visibility-and-sharing