

Create or Update Salesforce Campaigns ^[1]

April 12, 2024 by [m.essa](#) ^[2]

In IOS we have three different types of campaigns. The first step in creating a campaign is selecting the record type.

NOTE Please search available campaigns before creating a new to ensure that you are not making a duplicate.

Campaign Record Types

- **Event:** This record type is used when uploading a list of attendees from an in-person or virtual event.
- **Email:** This record type is used when creating an audience for a specific email or series of emails.
- **Marketing:** This record type is used to broadly group marketing campaign efforts.

Campaign Naming Conventions

- **Campaign Name:** 08 SOP custom name details
 - **08** = The first two numbers of a campaign name represent the **campus** on which it was created.
 - 01 = Boulder, 02 = Anschutz, 03 = Denver, 04 = Colorado Springs, 08 = System, 09 = Advancement
 - **SOP** = The next three or four letters of your report name represent the **group ID** that owns the report, in this case, School of Pharmacy. 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). If you are unsure of your group ID, please reach out to a team member for clarification.
 - **Custom Name Details** = You will now name the campaign however you like. Some examples might be the name of a symposium, student tours, or a specific event name.

Create Campaign

- Clone
- Create from Scratch

In our Salesforce environment, we already have thousands of Campaigns. For that reason, it

is most common 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

The screenshot shows the eComm interface. At the top, there's a blue cloud icon, a star icon, a dropdown arrow, and a plus icon. Below these is a search bar with the text "Search...". The main navigation bar includes "eComm", "Home", "Chatter", "Reports", and "Campaigns" (which is highlighted with a blue bar and a dropdown arrow). The "Campaigns" section is active, showing a campaign card for "08_UIS_20210615_MJJ Test". The card has an orange target icon and a share icon. Below the card, there's a table with columns: Type, Status, Start Date, and End Date. The table shows one row: Type: Email, Status: Planned, Start Date: (empty), End Date: (empty). Below the table, there's a "Details" tab (active) and a "Related" tab. The "Details" tab shows a list of fields: Campaign Name (08_UIS_20210615_MJJ Test), Parent Campaign, Type (Email), Description, and Active (checked). Each field has an edit icon (pencil) to its right. At the bottom, there's a "Campaign Details" section with a dropdown arrow.

Search...

eComm Home Chatter Reports Campaigns

Campaign
08_UIS_20210615_MJJ Test

Type	Status	Start Date	End Date
Email	Planned		

Details Related

Campaign Name 08_UIS_20210615_MJJ Test

Parent Campaign

Type Email

Description

Active ☒

▼ Campaign Details

- Modify the name of the Campaign

- Ensure
 - Type=Event, Email or Marketing
 - Active=Checked
 - Status=Planned, In Progress, or Complete
- Click the blue **Save** button

Campaign Information

* Campaign Name

08_UIS_20211115_MJJ Test

Parent Campaign

Search Campaigns...

* Type

Email

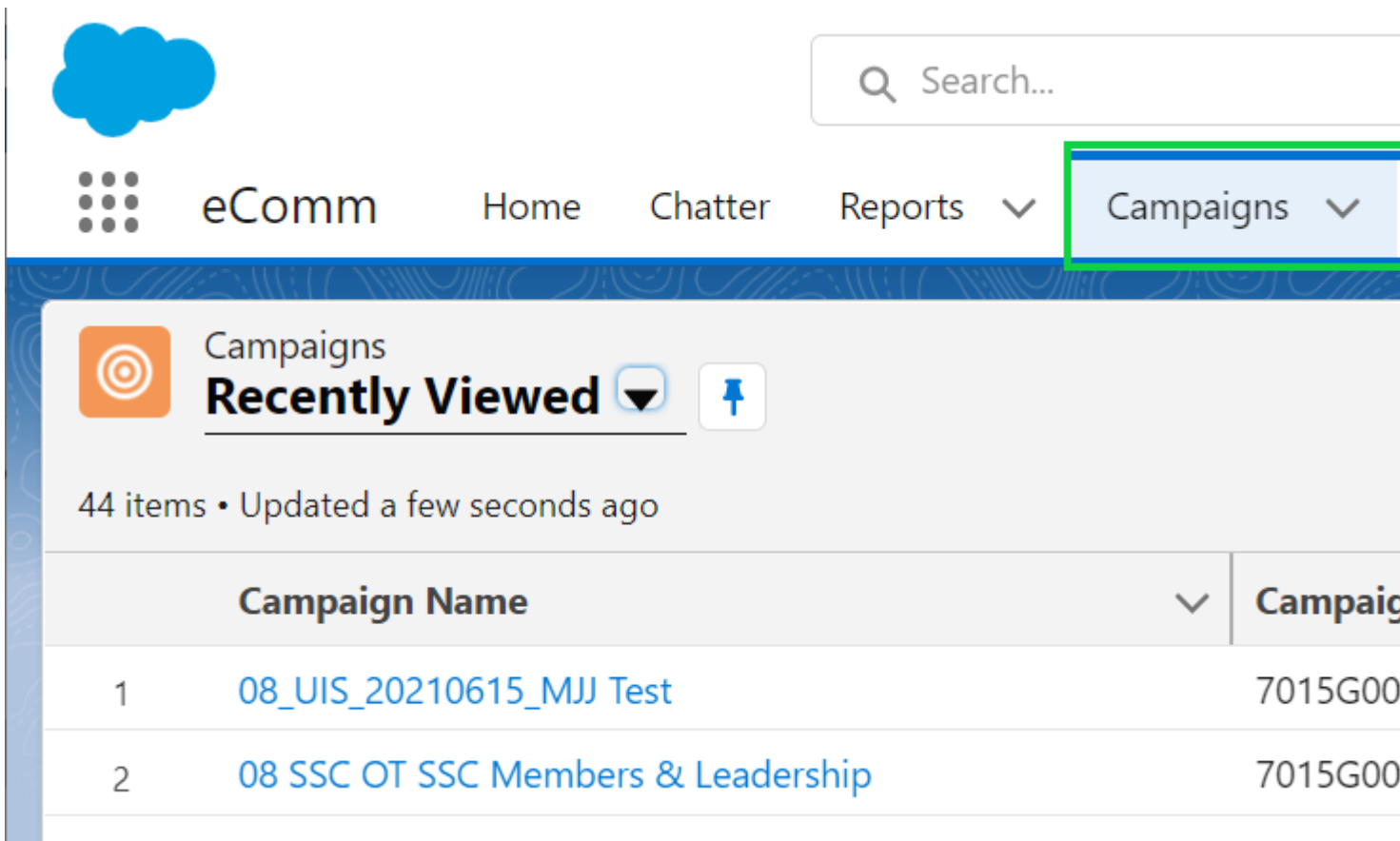
Description

Active

☒

- Select **Campaign** in the top navigation

- Click **New** in the top right corner



The screenshot shows the eComm application interface. At the top, there is a search bar and a navigation menu with items: Home, Chatter, Reports, and Campaigns. The 'Campaigns' menu item is highlighted with a green box. Below the navigation bar, there is a section titled 'Campaigns Recently Viewed' with a target icon and a dropdown arrow. Below this section, it says '44 items • Updated a few seconds ago'. A table is displayed with two columns: 'Campaign Name' and 'Campaign ID'. The table contains two rows of data.

	Campaign Name	Campaign ID
1	08_UIS_20210615_MJJ Test	7015G00
2	08 SSC OT SSC Members & Leadership	7015G00

- Event is set by default, please select the record type most relevant to your use.
- Select the blue Next button in the bottom right
- Enter the **Campaign Name**
- Click **Active** checkbox
- Select **Campaign Type**
- Add additional information to the Campaign, like **Description** and **Start/End date**.
- Select **Save**, the blue button in the bottom right

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