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Create or Update Salesforce Campaigns [1]

July 21, 2026 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:** [Campus Code] [Customer] [Customer Function/Area/Program] [Date] [Name/Description]
    - **Campus Code** is a two digit name representing the **campus** on which the campaign was created
        - 01 = Boulder, 02 = Anschutz, 03 = Denver, 04 = Colorado Springs, 08 = System, 09 = Advancement
    - **Customer** is the abbreviation for the group that owns the campaign. That could be a school, college, program or department
        - SOP = School of Pharmacy, CON = College of Nursing, ODL = Office of Digital Learning, ONL = Online Office
            - Others may be added as needed
    - **?Customer Function/Area/Program** represents the specific area supported by the campaign. That could be a program, a degree level, or something else
        - Examples: PharmD = doctorate program for School of Pharmacy, PallCare = Palliative Care program
    - **Date** is the when the campaign launched, or when the journey was activated
        - Please note that new versions of existing journeys don't necessitate an update to the date in the campaign name
    - **Description** is a short description of what the campaign is
        - Examples: Evergreen journey, RFI journey, information session webinar, event attendee list, etc.

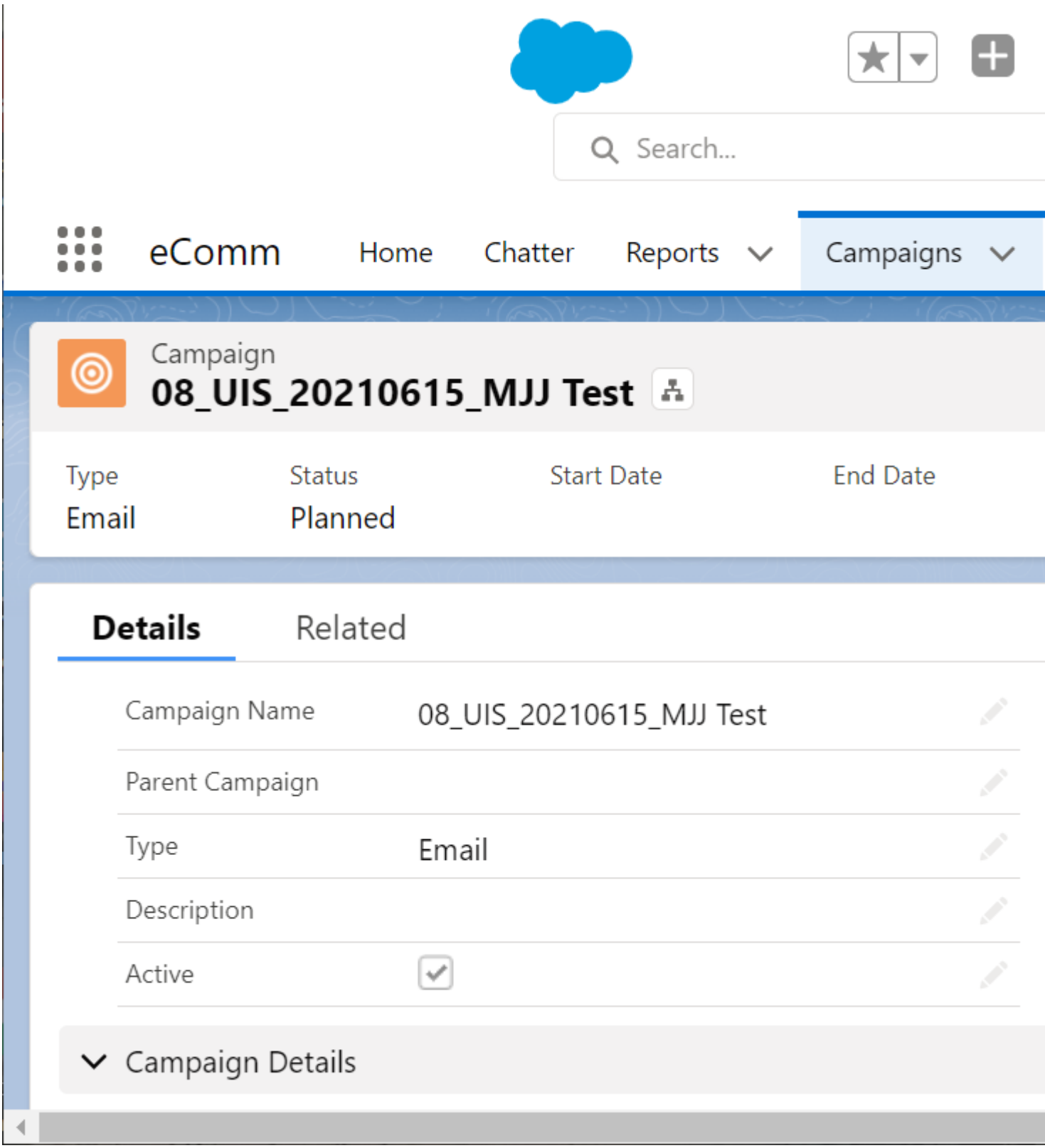
    - **Examples of how this syntax may look:**
        - **?**02 ODL CPP 072126 RFI Journey
        - 02 SOP PharmD 061426 Evergreen Journey
        - 03 ONL ALL 042506 Recruiting Event

Create Campaign

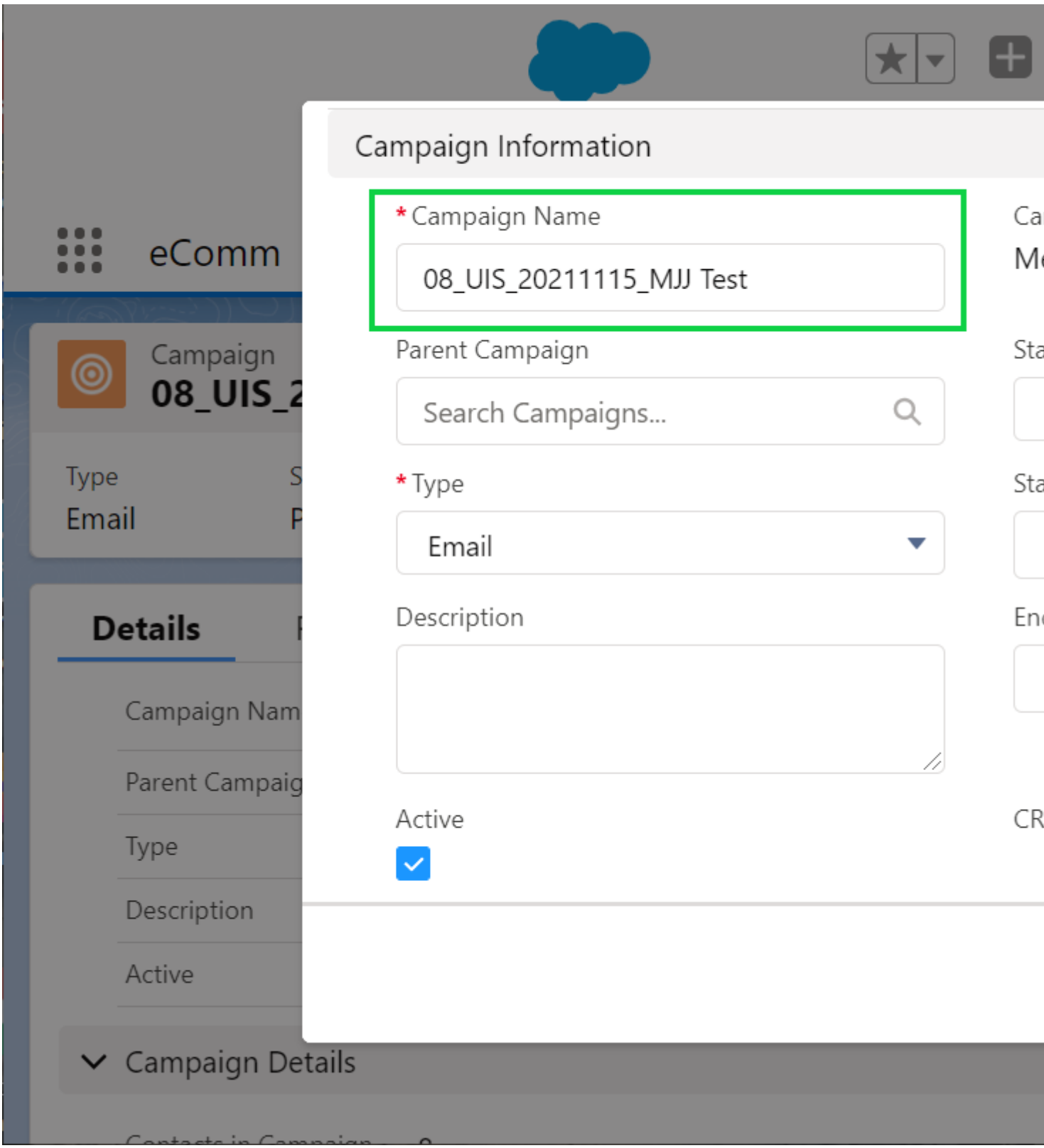
- Clone
- Create from Scratch

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.

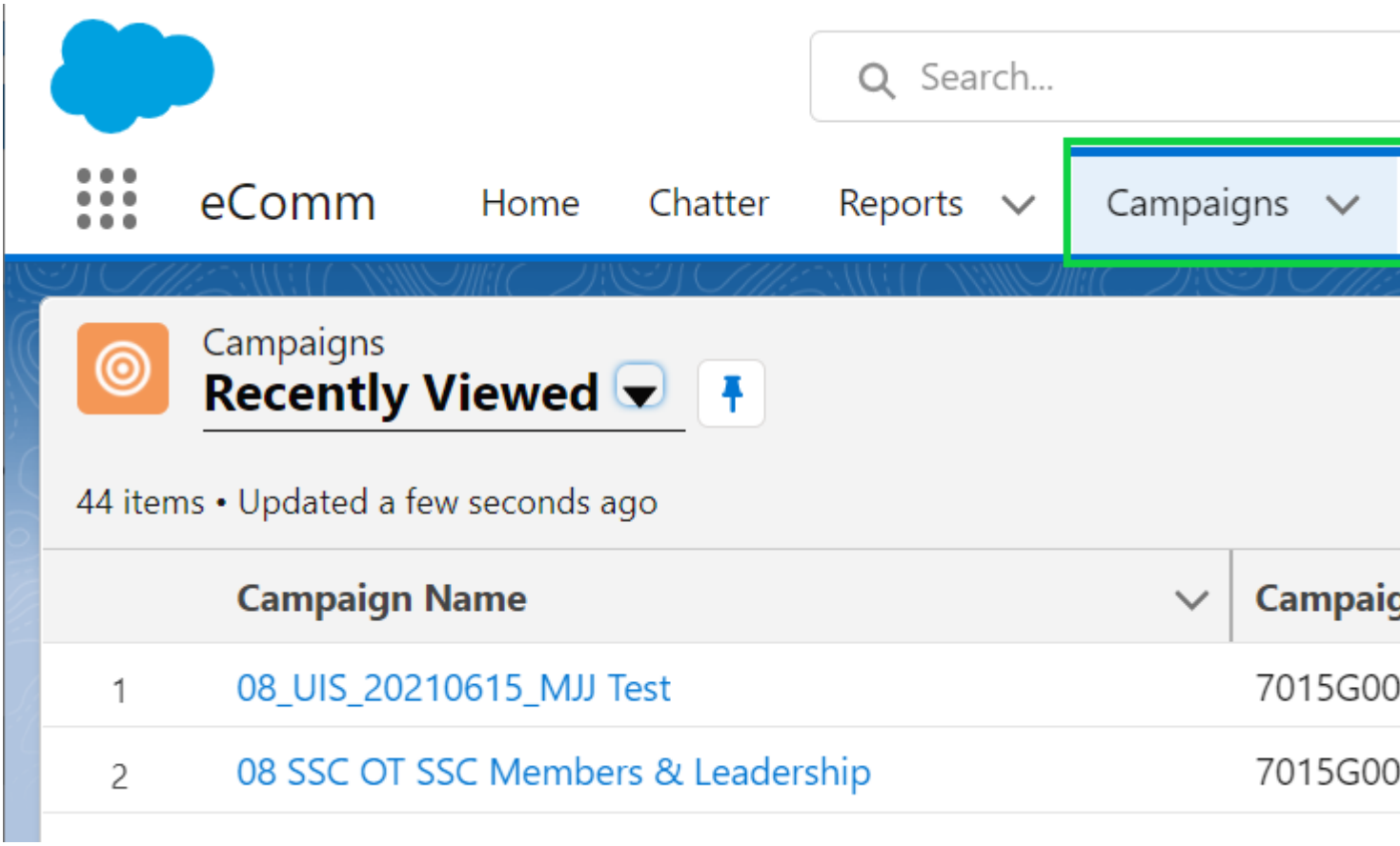
- Navigate to the **Campaign**
    - You could search for the Campaign with the **Global search** at the top
    - You could navigate to the **Campaigns tab** if you recently viewed the Campaign



- 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



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



- 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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