

Manage Campaign Members ^[1]

May 17, 2024 by [Melanie Jones](#) ^[2]

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

1. ***If your Report or Data Extension is based on a Salesforce Campaign***, users can manage Campaign Members and create new Contacts when needed.
2. Those audience changes will be reflected the next time the corresponding Report is sent to or Data Extension is started.

It's a great way for users to continually 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.

Find Campaign

Managing Campaign Members is easy, once you figure out what Campaign is linked to your Report/Data Extension. For some this will be straightforward and others more convoluted - either way there are tricks to find the correct Salesforce Campaign. Your eComm specialist can also provide these details to you.

Salesforce Campaigns are always converted to Salesforce Reports and then may or may not be created in Marketing Cloud as a Data Extension, which can make finding the correct Campaign more difficult. There are numerous ways to find your Salesforce Campaign.

You may be able to easily find the Campaigns associated to the Report/Data Extension you use with a quick search in Salesforce. It could be clear as day which Campaign you should use, but if there is any confusion it is worth going through the steps below to 'back into the answer' by looking at the Report/Data Extension.

- 0:00 | View All Campaigns
- 0:40 | Search
- 1:12 | Use Report/Data Extension to find Campaign ID



Data Extension

- Open the Data Extension (Marketing Cloud >> Email Studio >> Import >> select name) to find the Report name and/or Report ID.

The screenshot displays the Salesforce Marketing Cloud interface for configuring a Data Extension import. The navigation menu at the top includes 'Email', 'Overview', 'Content', 'Subscribers', 'Interactions', and 'A/B Testing'. The left sidebar shows a tree view under 'Interactions' with 'Import' selected. The main panel shows the configuration for 'Imports > 08 ECOM 20230216 Manage Camp'. The configuration includes the following fields:

- Name (required):** 08 ECOM 20230216 Manage Camp
- External Key:** 08 ECOM 20230216 Manage Camp_1
- Description:** 08 ECOM 20230216 Manage Campaign Session
- Source:** File location (required) is set to 'Salesforce Objects & Reports'.
- Destination Information (not editable):** This Salesforce Import currently maps **0005G000008e3fcUAA** to the...
- Import Action Settings:** Update Type (required) is set to 'Overwrite'.

Report

Open Report (two options)

- Login into Salesforce >> Open any Report >> Paste Report ID from above in the URL (similar character section) or use URL below
 - [https://cuecomm.lightning.force.com/lightning/r/Report/\[5\]PLACE ID HERE/view](https://cuecomm.lightning.force.com/lightning/r/Report/[5]PLACE ID HERE/view)

Report Filters

- Find a filter with 'Campaign ID' or 'Campaign Name' in the Report*



Search...



eComm

Home

Chatter

Reports

Campaigns

Dashboards



Report: Campaigns with Contacts

08 ECOM 20230216 Manage Campaign Session

CU President eNews

Total Records

2

	Contact ID	Campaign Name	First Name	Last N
1	003f400000mJOpF	08 ECOM 20230216 Manage Campaign Session	Melanie	Jones
2	003f400000zJW2E	08 ECOM 20230216 Manage Campaign Session	Albert	Einstei

*If this line doesn't exist in your Report, it's not based on a Campaign and therefore you cannot add/remove Campaign Members. You can however ask your eComm specialist for a Report based on a Campaign so you can make small audience changes. You would send emails to two Reports/Data Extensions .

Campaign

- Replace the Campaign ID into the existing URL (similar character section) or use URL below
 - [https://cuecomm.lightning.force.com/lightning/r/Campaign/\[6\]PLACE ID HERE/view](https://cuecomm.lightning.force.com/lightning/r/Campaign/[6]PLACE ID HERE/view)

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.

The screenshot shows a search interface with a blue header. On the left, there is a search bar with a magnifying glass icon and the text 'melanie'. Below the search bar, there is a navigation menu with 'eComm', 'Home', 'Chatter', 'Reports', and 'Campaigns'. The main content area is divided into two columns. The left column is titled 'Search Results' and has a sub-section 'Top Results'. It lists various categories with counts: Campaigns (5+), Licenses (1), Contacts (5+), Reports (2), Email Sends (5+), Accounts (3), and People (1). The right column is titled 'Contacts' and shows '5+ Results • Sorted by Relevance'. It contains a table with two columns: 'Name' and 'Email'. The first row is highlighted with a green border and contains 'Melanie Jones' and 'melani'. Below it are other entries: 'Melanie Jones' (meljon), 'Melanie Jones' (mjone), 'melanie jones' (meljon), and 'Melanie Jones'. Below the 'Contacts' section, there is a 'Reports' section with '2 Results • Sorted by Relevance'.

Name	Email
Melanie Jones	melani
Melanie Jones	meljon
Melanie Jones	mjone
melanie jones	meljon
Melanie Jones	

- Navigate to the **Related** tab
- Hover **Campaign History**
- The Campaign History pop-up will appear. Click the **Add to Campaign** button



Search...



eComm

Home

Chatter

Reports

Campaigns



Contact

Melanie Jones

Email (5) ▼

melanie.jones@cu.edu

Email Opt Out

Employee ID

234558

Details

Related

UCB Email Prefs

UCD Email Prefs

Related List Quick Links



Related Accounts (1)



Affiliations (5)



Applicati...



Campaign History

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

Campaign Name

- 1 [03_20220401_April First Friday with the School of Public Affairs](#)
- 2 [08 EMPL 20220315 Open Enrollment Benefit-Eligible Employees](#)
- 3 [08 EMPL 20220314 HCM Community](#)
- 4 [08 EMPL 20220302 Currently Enrolled Emps](#)

<https://cuecomm.lightning.force.com/lightning/r/Contact/003f400000mJOpFAAW/related/C>

- **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



Search daniella e



eComm

Home

Chatter

Reports



Campaigns



Search Results

Top Results

Contacts

1

Accounts

1

Chatter

i

Campaigns

0

Licenses

0



We searched for "daniella erik"



Daniella Erik

Recommended Result • Contact

Email



Campaign History

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

Campaign Name

St

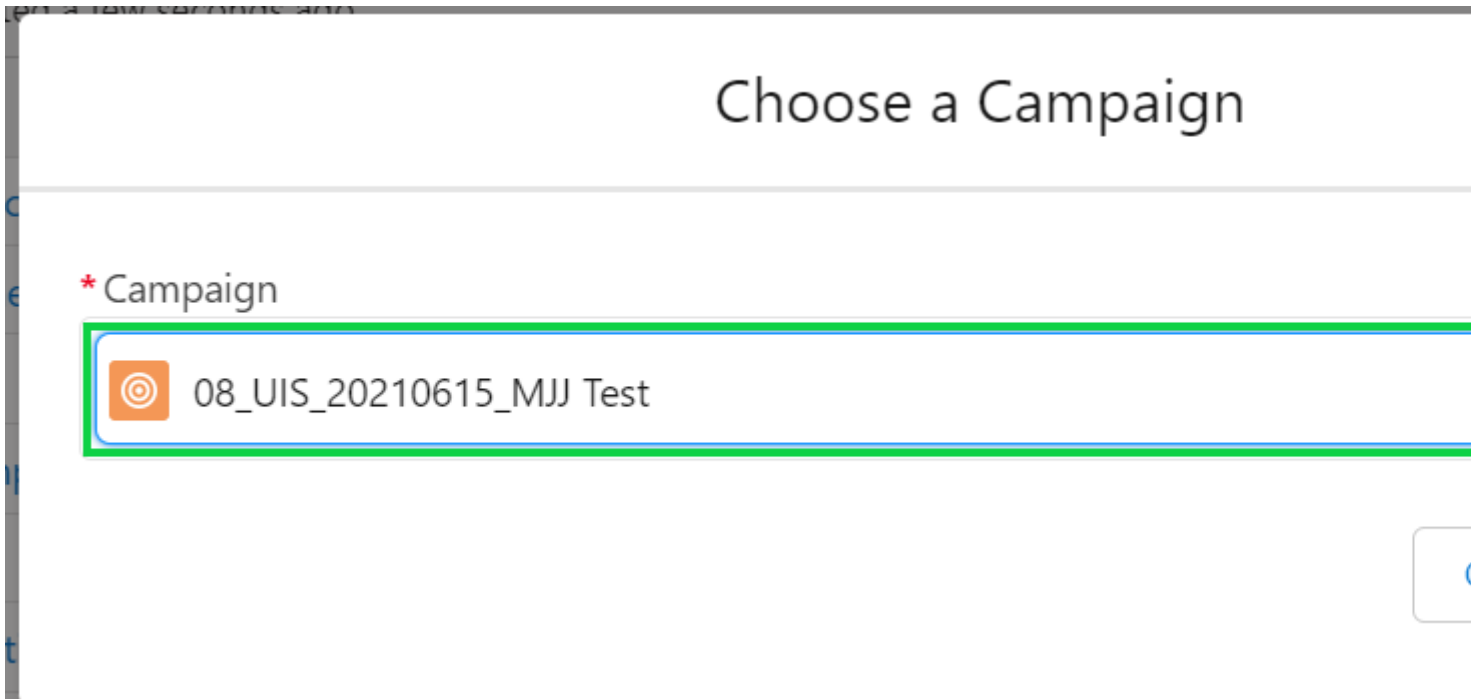
1

[01_ALUM_2](#)

2

[01 OIT CP 0](#)

- **Choose a Campaign**
- Click the blue **Next** button



Choose a Campaign

* Campaign

08_UIS_20210615_MJJ Test

Next

- 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

New Campaign Member

Campaign Member Information

Campaign 08_UIS_20210615_MJJ Test

Contact Daniella Eri

* Status

Sent

Engagement Scoring Information

Scored Registered

Scored Attended

Marketing Cloud Information

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



Search...



eComm

Home

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Campaign

08_UIS_20210615_MJJ Test



Type

Status

Start Date

End Date

Email

Planned

Details

Related



Campaign Members (6+)

Type

First Name

[Contact](#)

Bob

[Contact](#)

Daniella

[Contact](#)

Eric

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**

Search Contacts...



Jennifer Mortensen



Daniella Eri



[View All](#)

2 items selected



Name



Email



Melanie Jones

melani



Melanie Jones

meljon

- 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

Add to Campaign

2 Contacts Selected

* Campaign

 08_UIS_20210615_MJJ Test

* Member Status

Sent

Update existing campaign members?

- Keep member status
- Overwrite member status

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**



Search...



eComm

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Campaign

08_UIS_20210615_MJJ Test



Type

Status

Start Date

End Date

Email

Planned

Details

Related



Campaign Members (6+)

Type

First Name

[Contact](#)

Bob

[Contact](#)

Daniella

[Contact](#)

Eric

[Contact](#)

Jennifer

[Contact](#)

Joshua

[Contact](#)

Katie

- Check the **box** next to the name of those you want to remove
- Click the **Remove** button in the top right



Search..



eComm

Home

Chatter

Reports ▾

Campaigns ▾

Campaigns > 08_UIS_20210615_MJJ Test

Campaign Members

2 items selected

	<input type="checkbox"/>	Type ▾	First Name ↑ ▾	Last Name
1	<input type="checkbox"/>	Contact	Bob	G
2	<input checked="" type="checkbox"/>	Contact	Daniella	T
3	<input checked="" type="checkbox"/>	Contact	Eric	M
4	<input type="checkbox"/>	Contact	Jennifer	M
5	<input type="checkbox"/>	Contact	Joshua	F
6	<input type="checkbox"/>	Contact	Katie	T
7	<input type="checkbox"/>	Contact	Kayla	G
8	<input type="checkbox"/>	Contact	Melanie	J

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

Remove Campaign Members

Are you sure you want to remove 2 selected members from this campaign?

Theiler

katietheiler@gmail.com

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.

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. *It could take up to 2 minutes for the new Contact to appear in Salesforce.*

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.edu, @cuanschutz.edu, @ucdenver.edu, @uccs.edu, @cu.edu, @cufund.org, etc). Contacts with a good email containing a university domain should already exist in Salesforce.

First Name

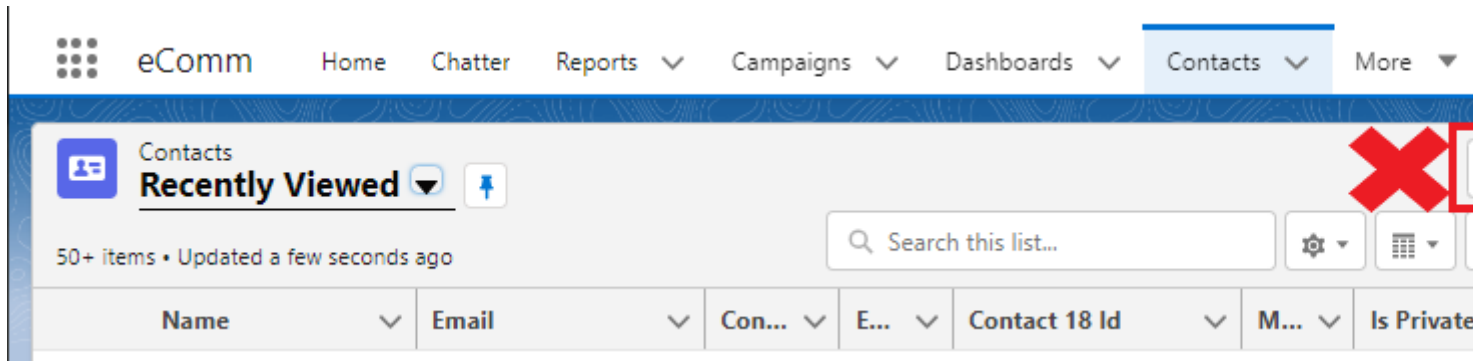
Last Name

Email Address

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.

NEVER create a new Contact directly in Salesforce. These incorrectly created Contacts will automatically be deleted, undoing your work. Instead, follow the instructions above.



Frequently Asked Questions

Can I create my own audiences from scratch?

- No. New audiences will still need to be created by an eComm specialist with their turnaround times in mind. This is to ensure audience accuracy, including adhering to CAN-SPAM.

I can't find the Campaign my eComm specialist made, that's linked to my Report/Data Extension. Should I make a new one?

- No. A new Campaign is considered a new audience. See above.

Can I make mass changes to a Campaign?

- No. Mass changes to an existing Campaign will still need to be completed by an eComm specialist. The processes available to users are good for small changes (less than 20) but would be cumbersome for mass changes.

Can I update Reports that are not based on a Campaign?

- No. Any updates to a Report will need to be made by an eComm specialist.
- No, but you could ask your eComm specialist for a Report based on a Campaign so you can make small audience changes. You would send emails to two Reports/Data Extensions .

Related Content

- [What is the difference between a campaign and a report?](#) [7]
- [How are campaigns connected to reports?](#) [7]
- [Why do campaigns have such complicated names?](#) [8]
- [How do I modify or delete a campaign?](#) [9]
- [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:

Manage Campaign Members

Send email when Published:

No

Source URL:<https://www.cu.edu/blog/ecommerce/wiki/manage-campaign-members>

Links

[1] <https://www.cu.edu/blog/ecommerce/wiki/manage-campaign-members> [2] <https://www.cu.edu/blog/ecommerce/wiki/author/39> [3] <https://www.cu.edu/blog/ecommerce/wiki/sending-reports-vs-data-extensions-vs-campaigns> [4] <https://www.cu.edu/blog/ecommerce/wiki/create-salesforce-campaign-and-add-campaign-members> [5] <https://cuecommerce.lightning.force.com/lightning/r/Report/> [6] <https://cuecommerce.lightning.force.com/lightning/r/Campaign/> [7] <https://www.cu.edu/blog/ecommerce/wiki/salesforce-campaign-vs-salesforce-report> [8] <https://www.cu.edu/blog/ecommerce/wiki/naming-conventions> [9] <https://www.cu.edu/blog/ecommerce/wiki/modify-or-delete-salesforce-campaign> [10] <https://www.cu.edu/blog/ecommerce/wiki/using-salesforce-apsona> [11] <https://www.cu.edu/blog/ecommerce/wiki/salesforce-visibility-and-sharing>