



Customizing with Field Sets

Campaign Calendar's powerful drag-and-drop tools allow you to easily **visualize**, **manage** and **share** all of your marketing programs. With the introduction of **Field Sets**, Campaign Calendar can now easily be customized to adhere to your specific Campaign field customization. Here's a quick guide to help you understand this powerful new feature.

CAMPAIGN CALENDAR DEFAULT LAYOUT

Campaign Calendar provides you a simple, intuitive interface to quickly schedule new Campaigns directly from the Calendar without opening the Campaigns tab.

- No configuration required to begin using the default layout immediately
- The default layout contains the critical fields marketing users need to keep status of Campaigns updated

Campaign Edit
New Campaign

Campaign Edit [Save] [Cancel]

Campaign Information [Required Information]

Campaign Name [Text Field] Active ☐

Type [None] Exclude from Calendar ☐

Start Date [6/9/2011] Budgeted Cost [Text Field]

End Date [6/9/2011] Actual Cost [Text Field]

[Save] [Cancel]

FIELD SET CUSTOMIZATION **New!**

Field Sets is a new feature that allows administrators to add, remove, or reorder fields in Campaign Calendar without modifying any code!

- Customizing Field Sets are as simple as modifying Page Layouts
- Use the Salesforce drag-and-drop interface to modify the Campaign view within Campaign Calendar

Available for the Field Set

Campaign ID
Converted Leads
Created By ID
Created Date
Deleted
Description
Expected Response (%)
Expected Revenue
Last Activity
Last Modified By ID
Last Modified Date
Num Sent
Num Total Opportunities

In the Field Set

Name
Active
Type
Exclude from Calendar
Start Date
Budgeted Cost
End Date
Actual Cost
My Custom Field

CUSTOM LAYOUT

Modify the Campaign Calendar details with the fields that matter most to your marketing team.

Note: Only one Campaign Calendar Field Set per calendar is available. If you would like to see more help us promote the Idea to Salesforce.

Campaign Edit
New Campaign

Campaign Edit [Save] [Cancel]

Campaign Information [Required Information]

Campaign Name [Text Field] Active ☐

Type [None] Exclude from Calendar ☐

Start Date [6/9/2011] Budgeted Cost [Text Field]

End Date [6/9/2011] Actual Cost [Text Field]

My Custom Field [Text Field]

[Save] [Cancel]

Vote for <http://success.salesforce.com/ideaView?c=09a30000000D9xtAAC&id=08730000000Y0dLAAS>

LEARN MORE

Check it out in the Salesforce
AppExchange.
<http://bit.ly/campcal>

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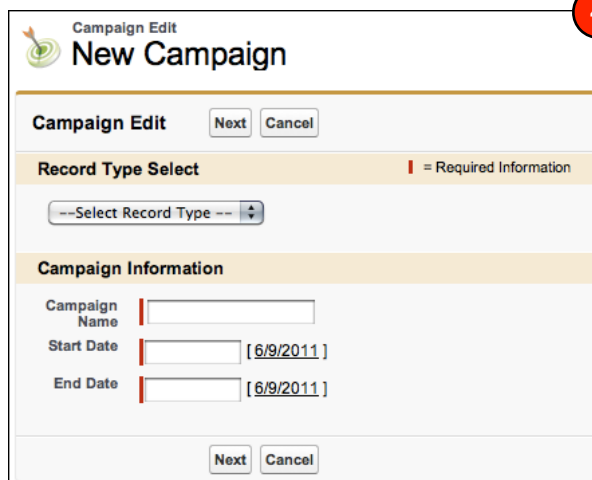
Questions?
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RECORD TYPE SELECTION

If you have Campaign record types enabled for your organization, Campaign Calendar will inject an intermediary screen asking for your record type selection. A couple of things to know:

- The Record Type Select picklist is dynamically generated to only display options available to the user's profile
- While Field Set customizations honor Record Type picklist values, it currently does not honor specific page layouts assigned to the Profile. We recommend the following three rules of thumb:
 - Display the lowest common denominator fields on Campaign Calendar that comply to your security rules
 - Institute a process to leverage the Full Campaign Details button to make additional edits
 - Apply Field Level Security to further enforce permissions



Help us vote up an Idea to Salesforce to help us provide the ability to more accurately support Record Type, Page Layouts and Field Sets.

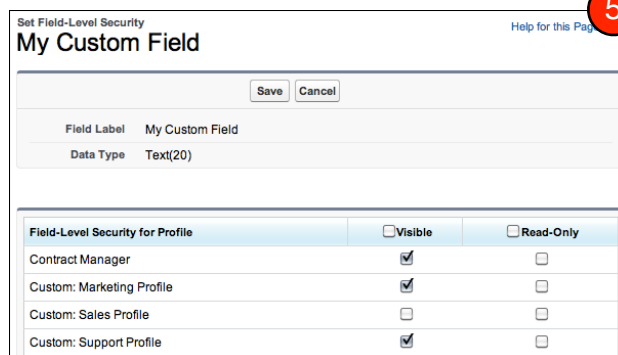
Vote here: <https://sites.secure.force.com/success/ideaView?c=09a30000000D9xt&id=08730000000BrQtAAK>

FIELD LEVEL SECURITY

If you need further customization than Field Sets can provide, consider using Field Level Security to further control your Campaign Calendar page layout.

For every field on the Campaign Calendar Field Set, you can set field level permissions by profile. Remember these field level permissions apply not only in the Campaign Calendar but also in the Campaigns tab and Campaign reports.

- Example: You could add the Actual Cost field to your Campaign Calendar Field Set, and have the following field level permissions set:
 - ▶ Hidden to Sales Profile
 - ▶ Visible to Marketing Profile
 - ▶ Editable by System Administrators



Field-Level Security for Profile	Visible	Read-Only
Contract Manager	☒	☐
Custom: Marketing Profile	☒	☐
Custom: Sales Profile	☐	☐
Custom: Support Profile	☒	☐

For organizations using Record Types this is a great intermediary solution to providing additional security and permissions to Campaign Calendar that are not innately available in Salesforce.

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