CAMPAIGN MEMBER HELPER

ASTREA IT SERVICES

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ASTREA IT SERVICES

C-52, Sector 65

NOIDA, INDIA

OVERVIEW

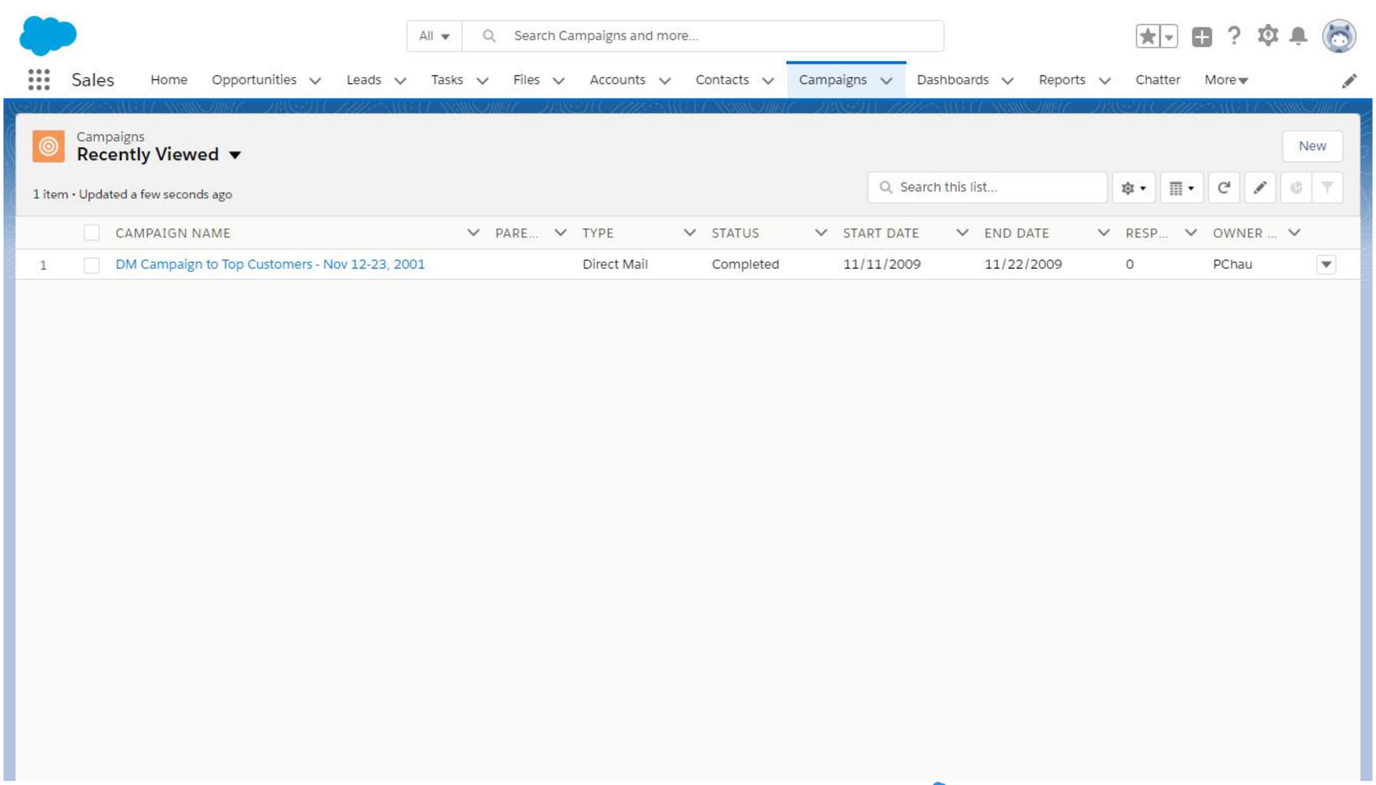
The main objective of this component is to recreate the functionality of adding campaign member through search option in lightning analogous to the classic salesforce version.

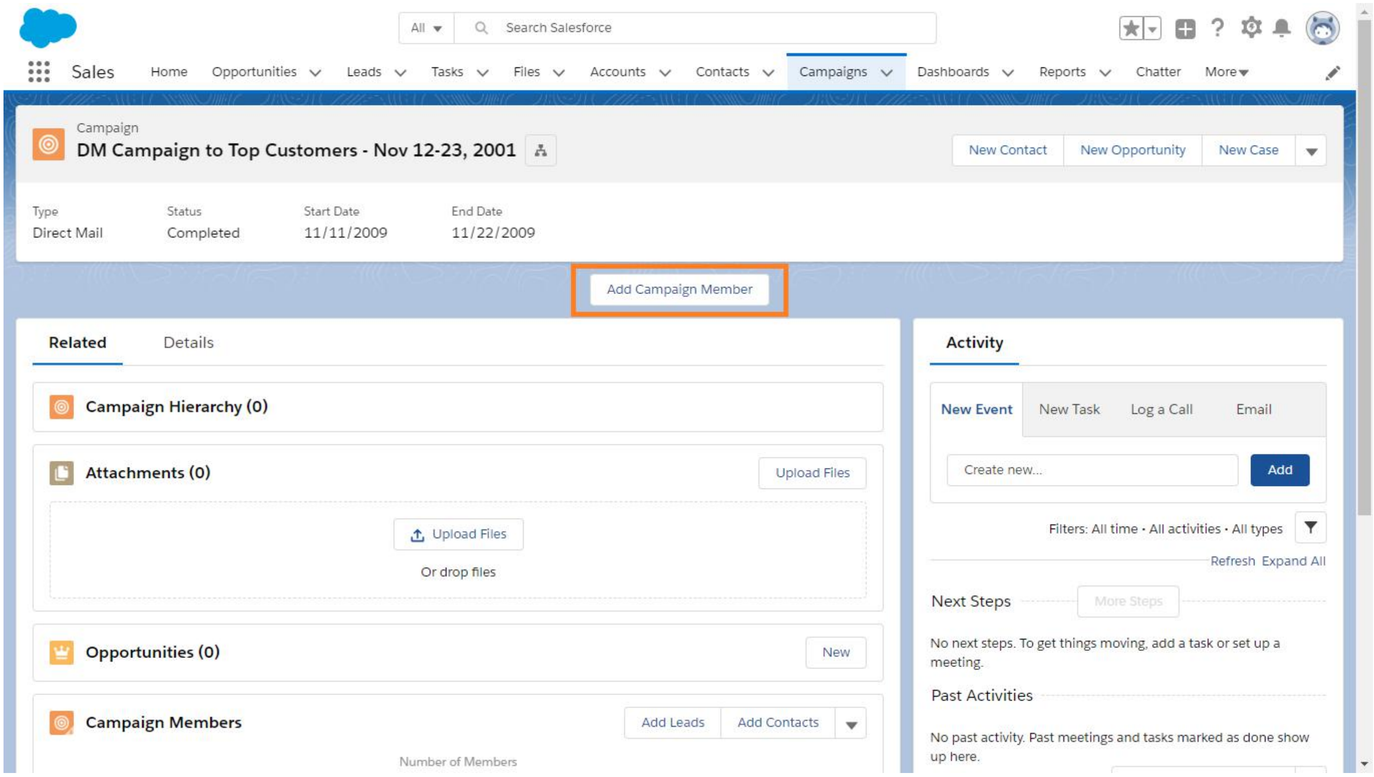
KEY FEATURES

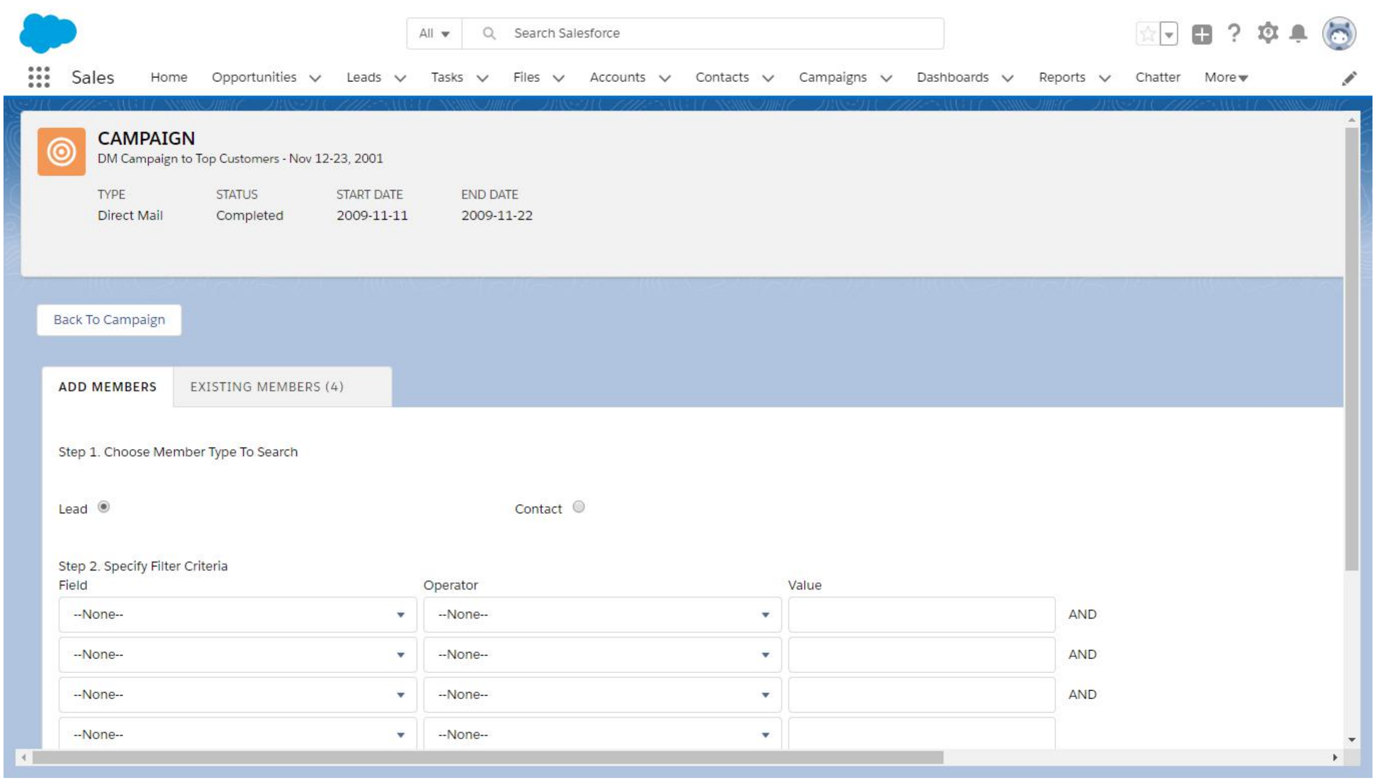
- Replicating the functionality of adding campaign member through search using a simple button click.
- Searching through a lead or contact record based on filters applied.
- Mass adding new campaign members by selecting the desired status.
- Ability to remove existing campaign members.
- Feature to update status of existing campaign member.

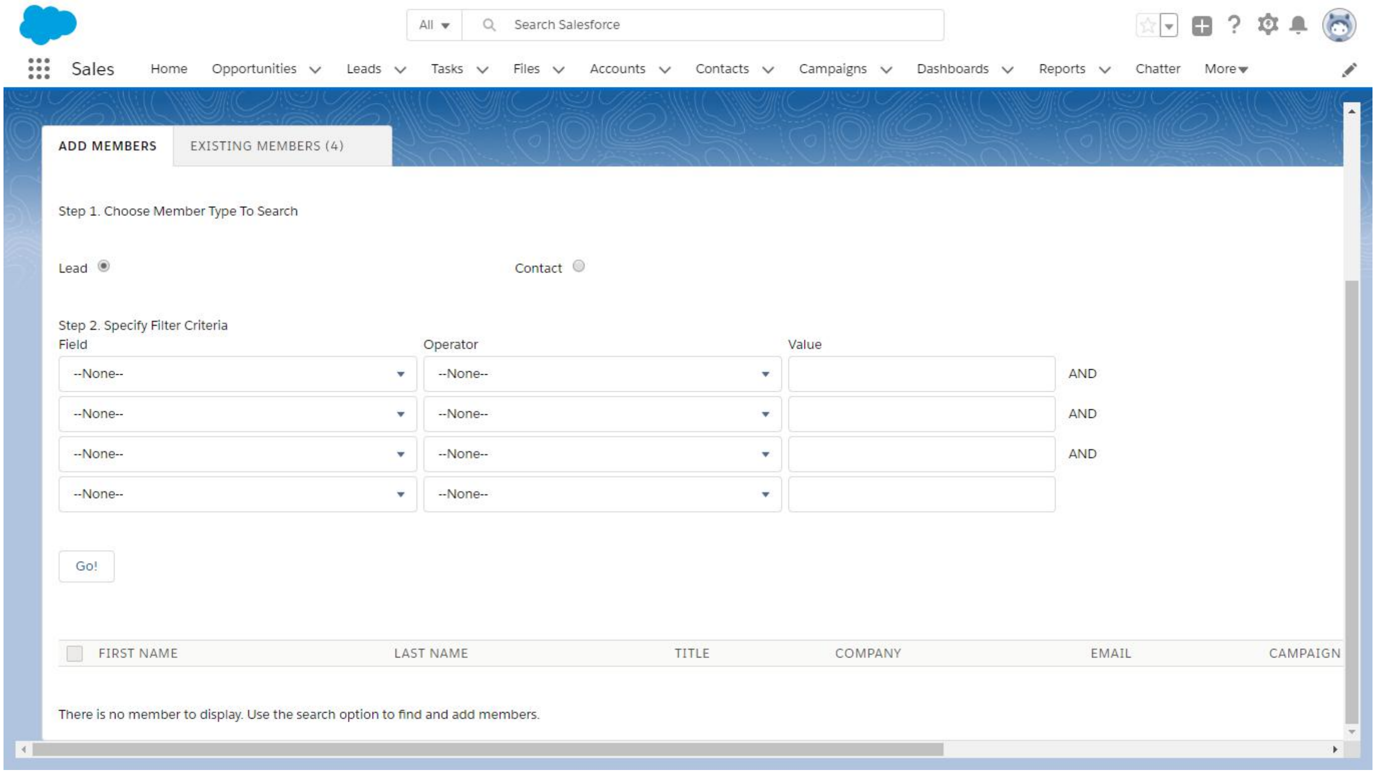
Using this component, a user can add new campaign member(s) to a particular campaign by selecting the lead or contact records based on filters applied during the search process and further adding it with a desired status.
It also presents the functionality to edit and/or delete one or many existing campaign member(s) with a click of a button.

From the available campaigns choose a campaign to which you want to add members




All
Search Salesforce
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
More
Campaign
DM Campaign to Top Customers - Nov 12-23, 2001
New Contact
New Opportunity
New Case
Type
Direct Mail
Status
Completed
Start Date
11/11/2009
End Date
11/22/2009
Add Campaign Member
Related
Details
Campaign Hierarchy (0)
Attachments (0)
Upload Files
Upload Files
Or drop files
Opportunities (0)
New
Campaign Members
Add Leads
Add Contacts
Number of Members
Activity
New Event
New Task
Log a Call
Email
Create new...
Add
Filters: All time • All activities • All types
Refresh
Expand All
Next Steps
More Steps
No next steps. To get things moving, add a task or set up a meeting.
Past Activities
No past activity. Past meetings and tasks marked as done show up here.

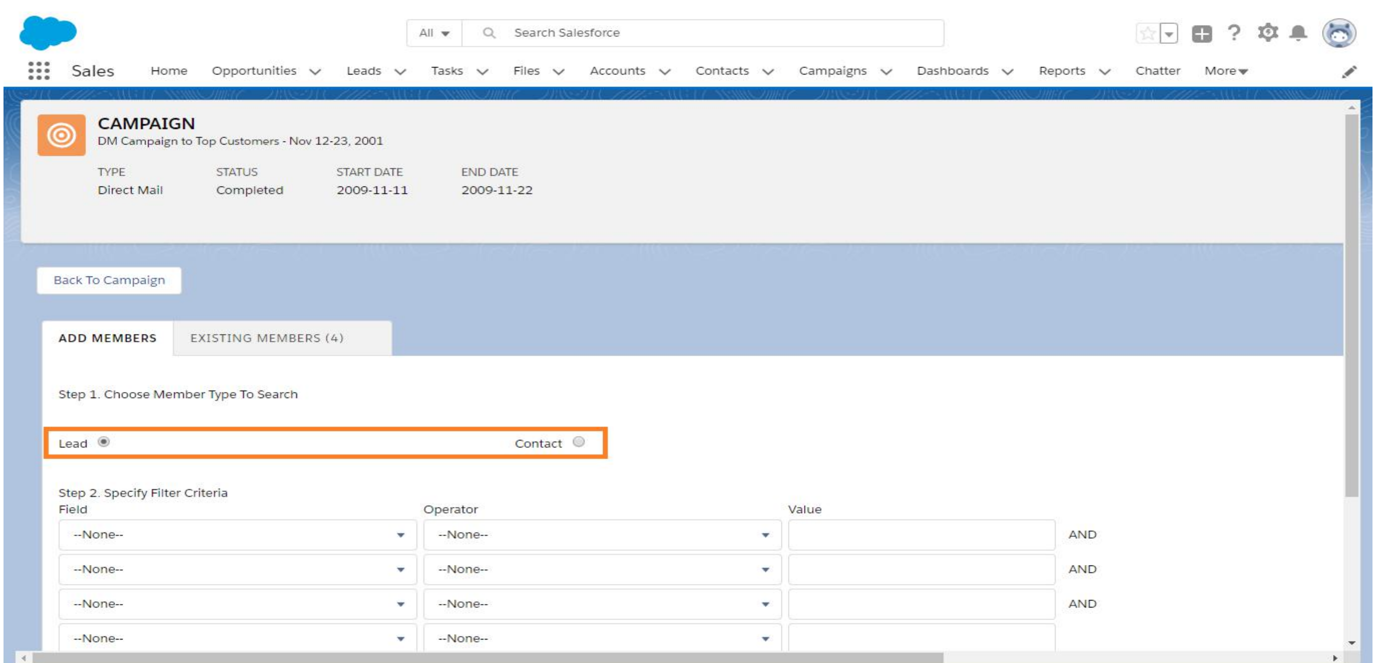

All
Search Salesforce
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
More
CAMPAIGN
DM Campaign to Top Customers - Nov 12-23, 2001
TYPE
Direct Mail
STATUS
Completed
START DATE
2009-11-11
END DATE
2009-11-22
Back To Campaign
ADD MEMBERS
EXISTING MEMBERS (4)
Step 1. Choose Member Type To Search
Lead
Contact
Step 2. Specify Filter Criteria
Field
Operator
Value
--None--
AND



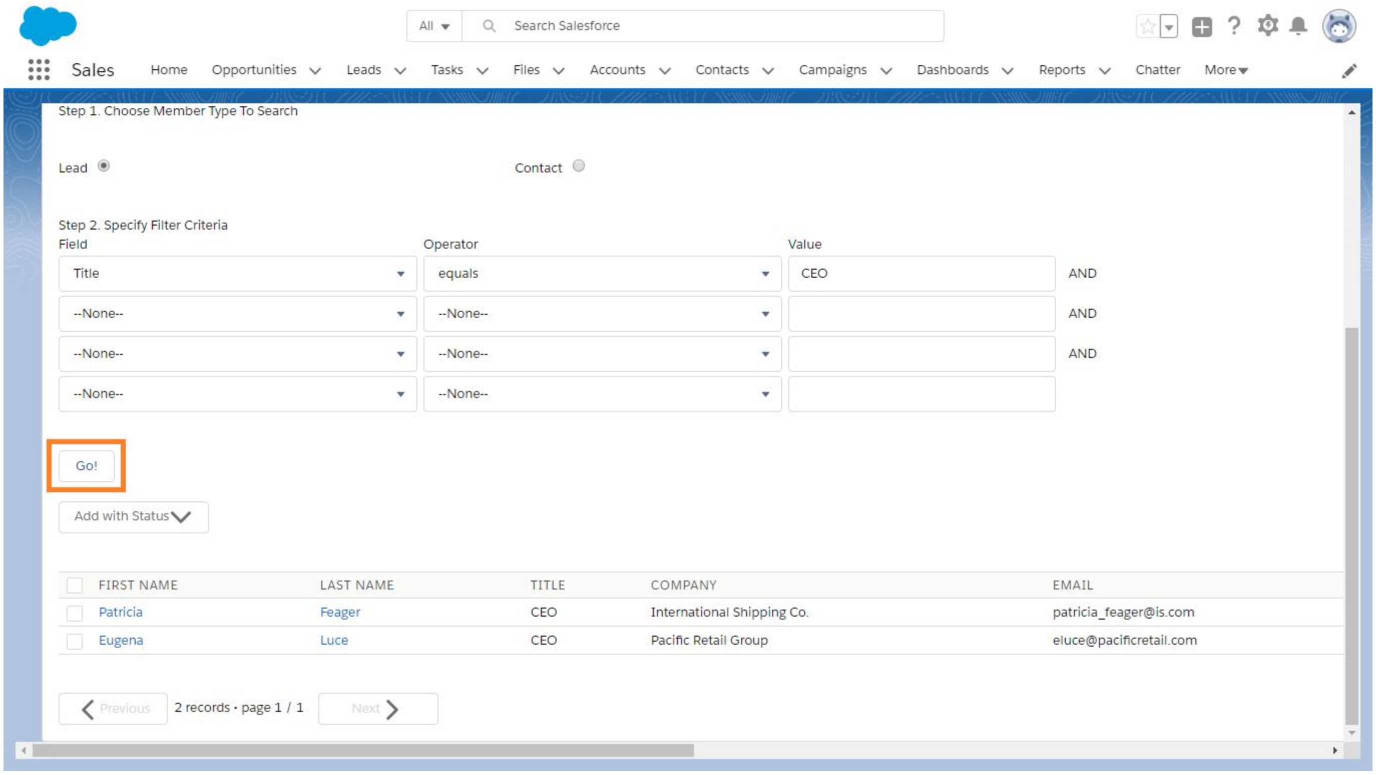
GETTING STARTED

Given below are steps to introduce one to the functionalities achievable by the component.

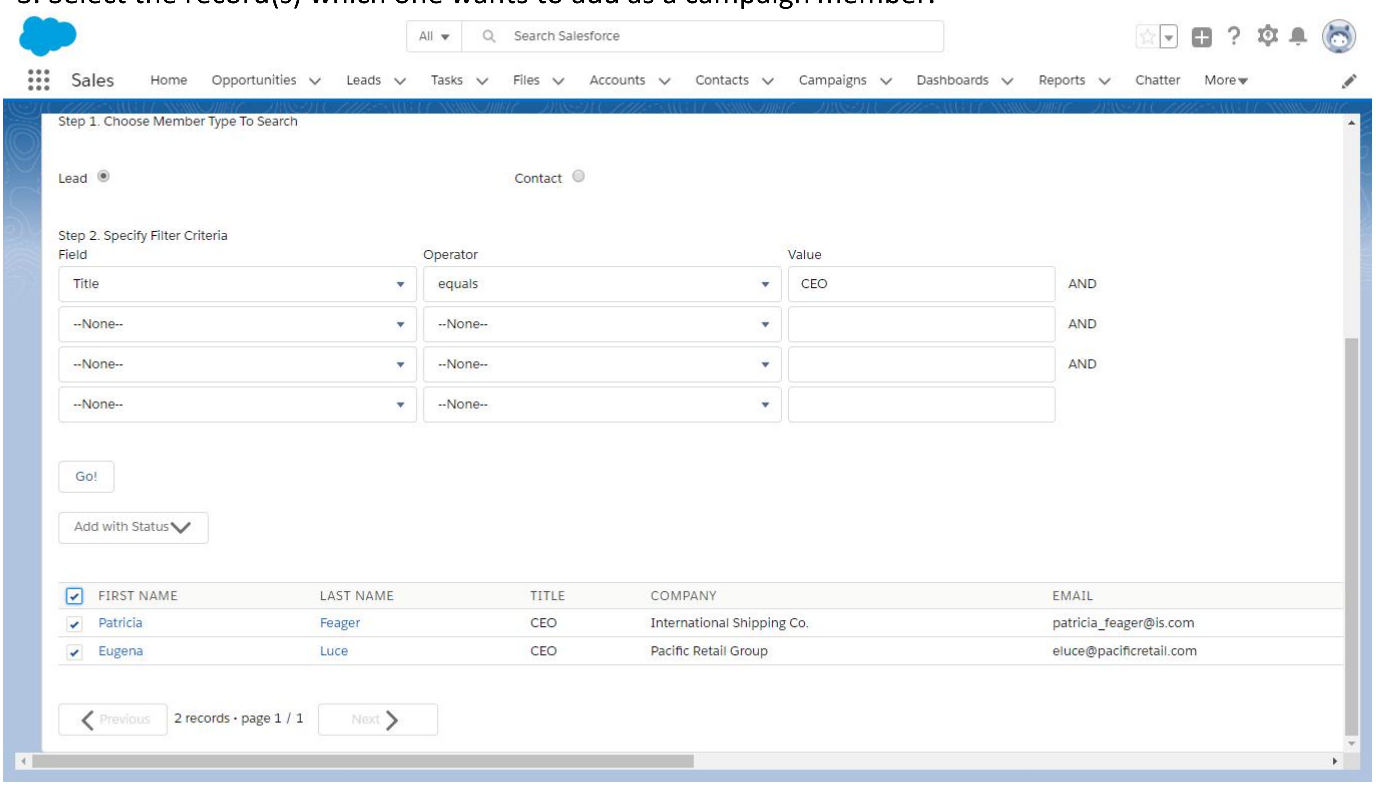
1. Select the radio button corresponding Lead or Contact to determine whether onewants to add a Lead or a Contact.



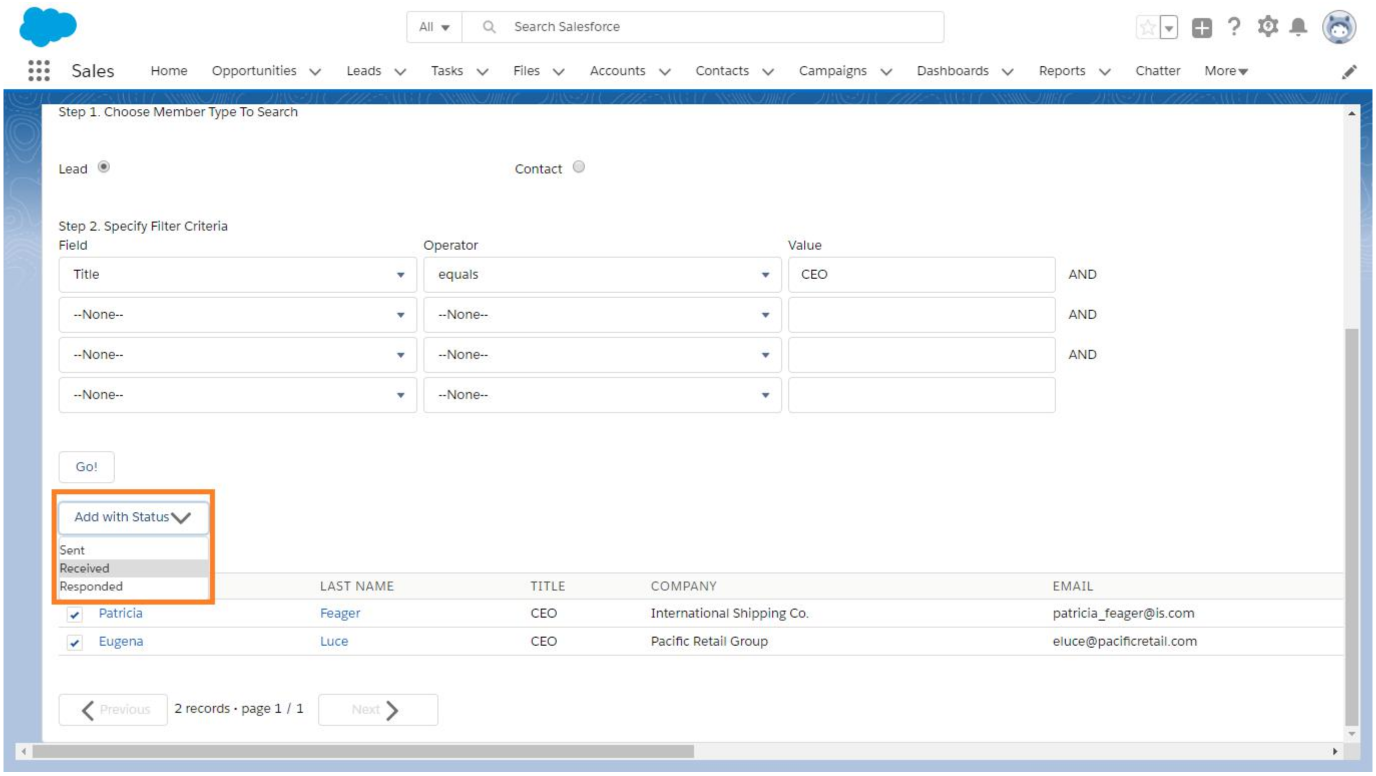
2. Press Go! . Add filters to make the search more precise (Optional).



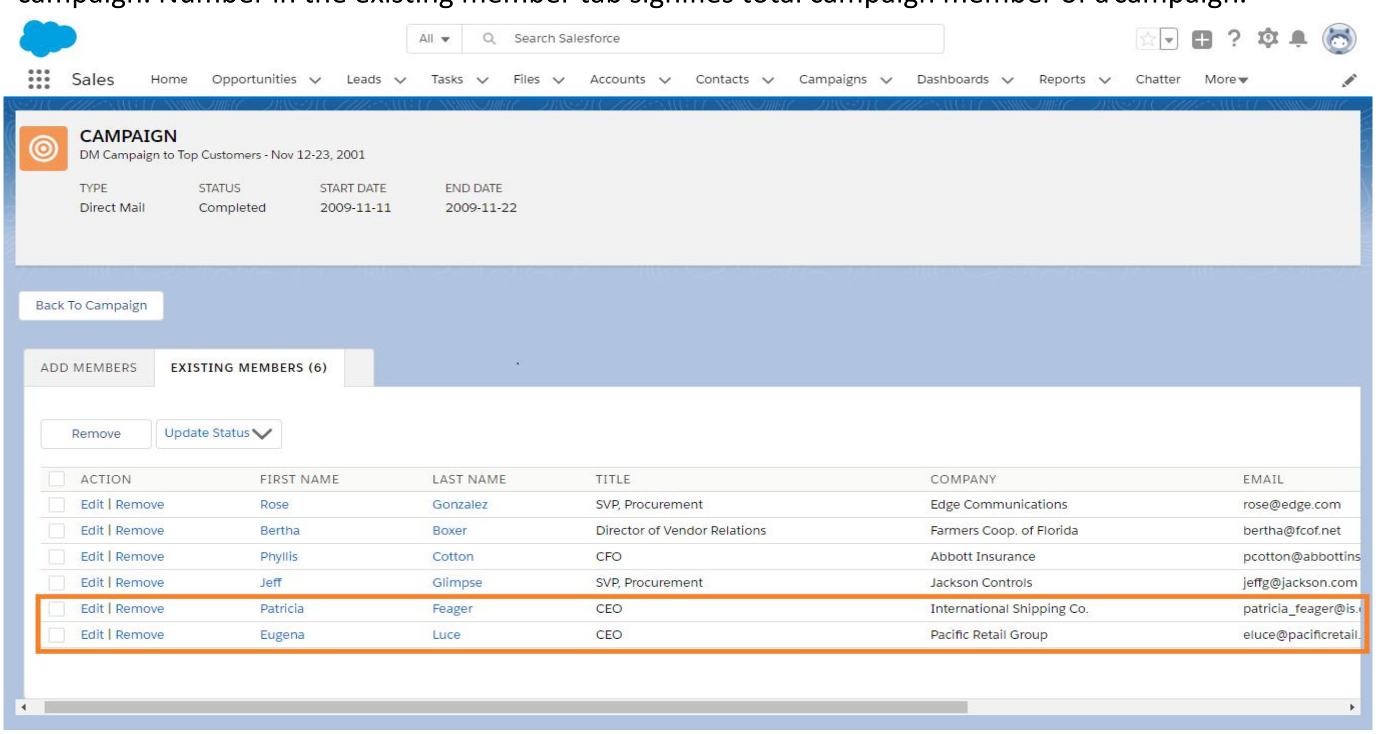
3. Select the record(s) which one wants to add as a campaign member.



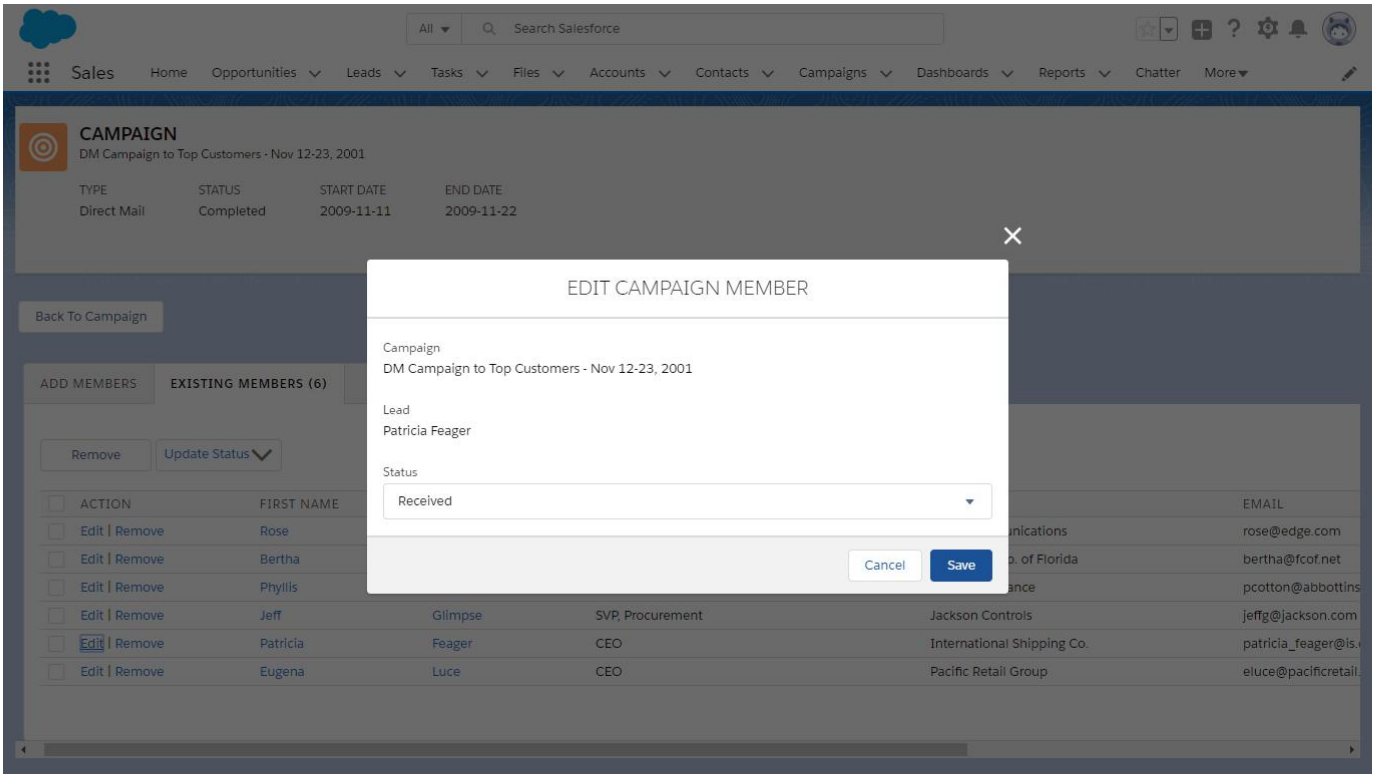
4. Click on Add with Status . Select desired status.

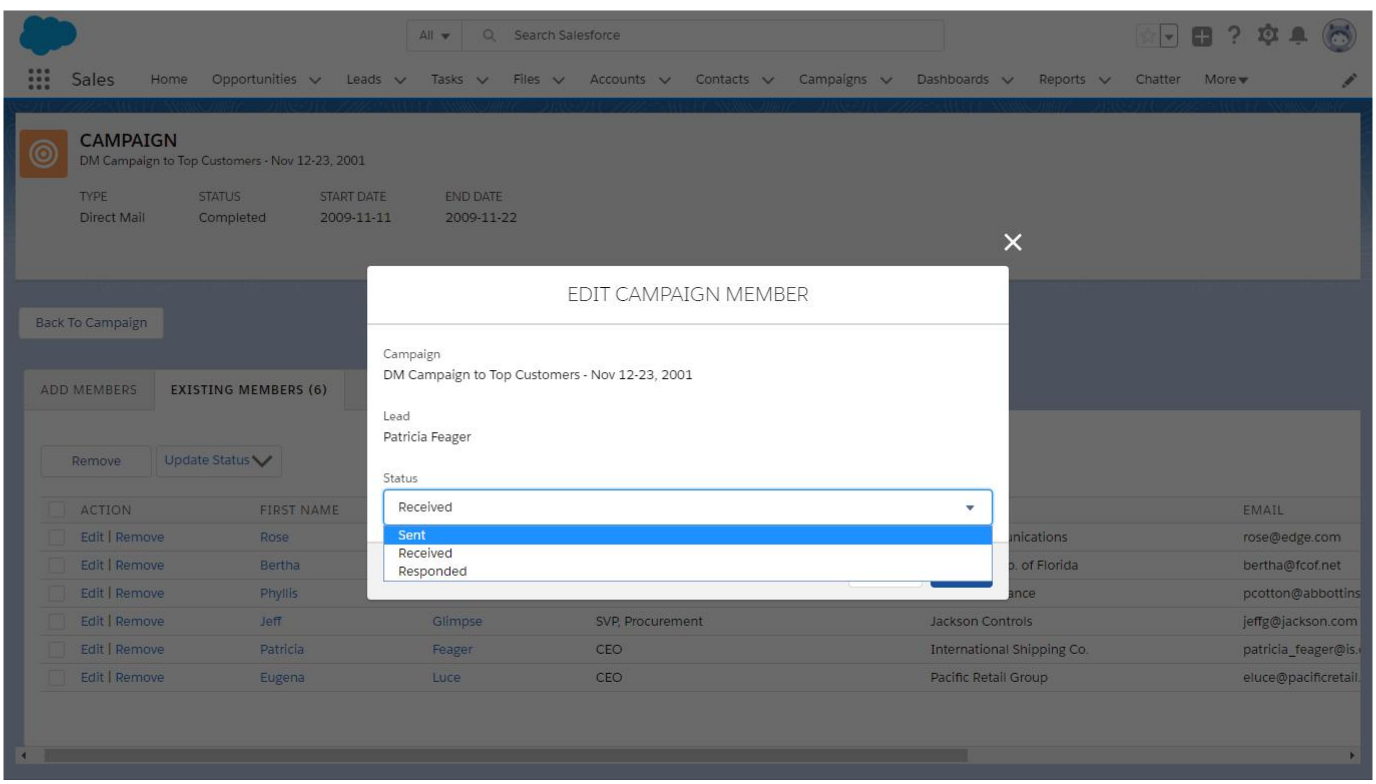


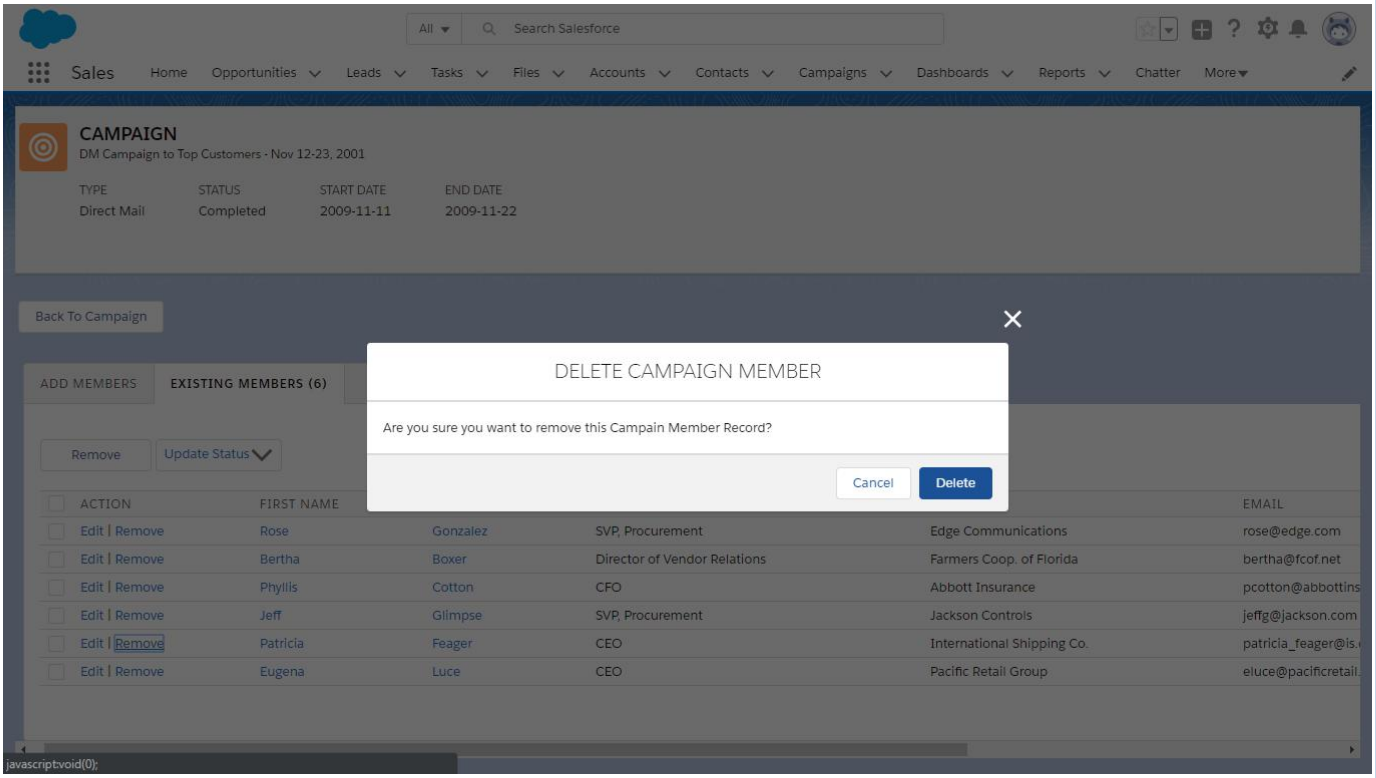
5. It activates the Existing Member tabs and displays all the campaign member of that particular campaign. Number in the existing member tab signifies total campaign member of a campaign.



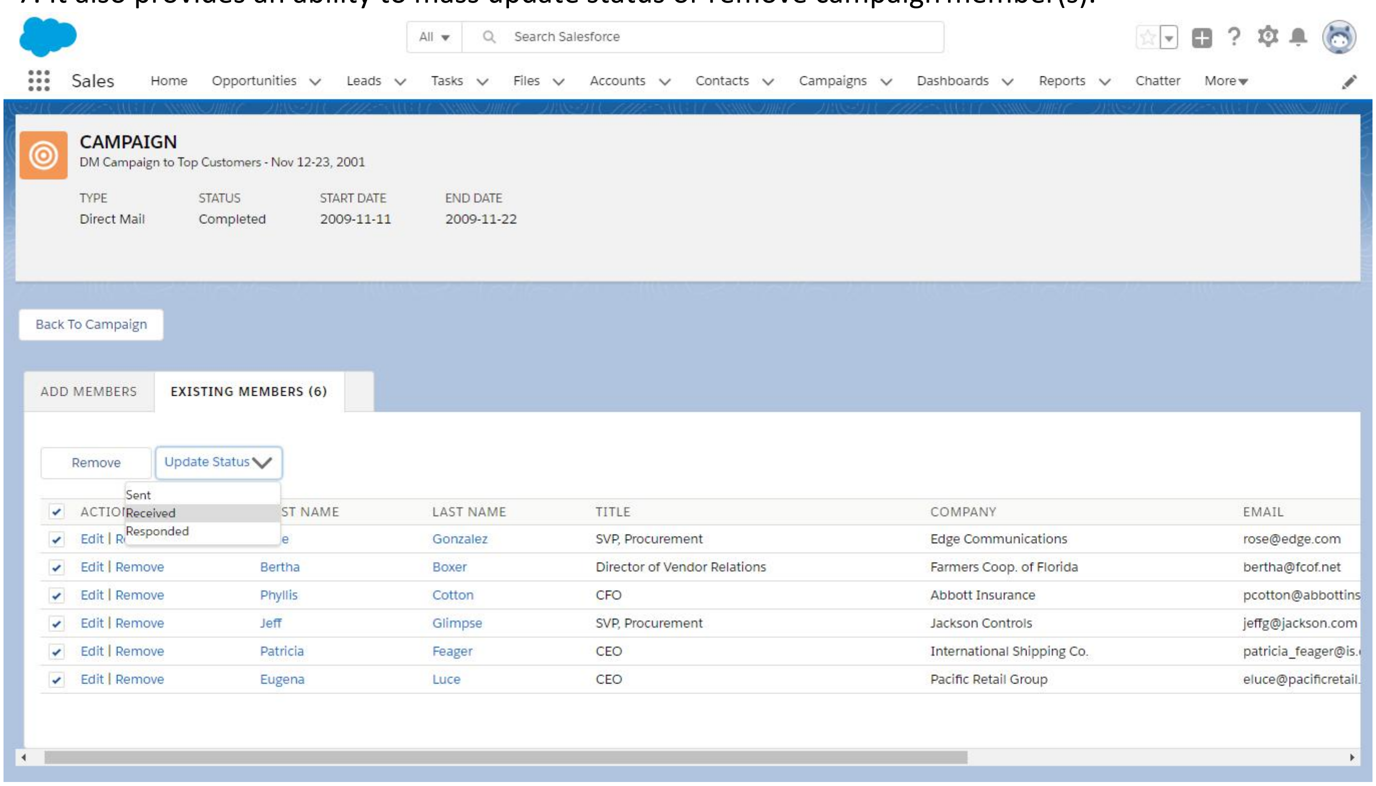
6. It provides an ability to edit or remove individual campaign member by clicking on
Edit | Remove

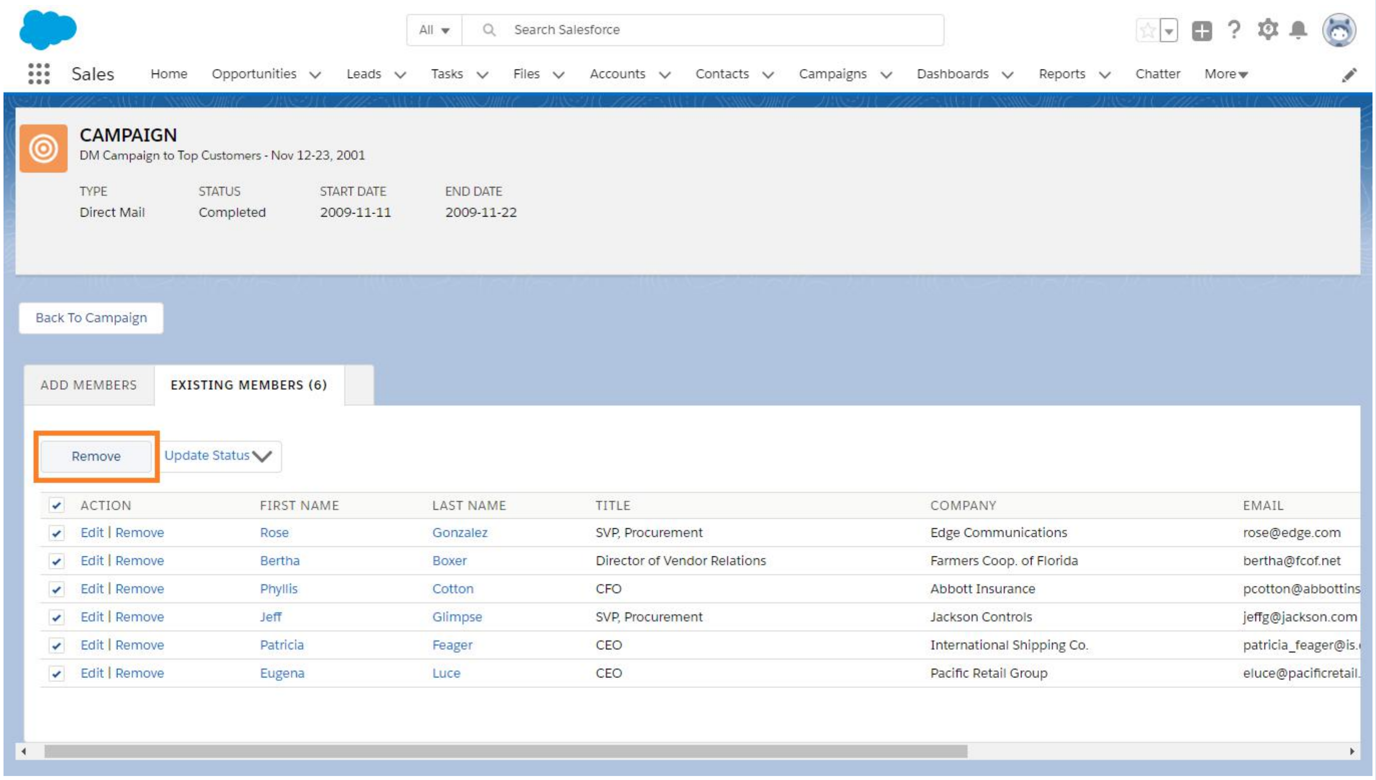




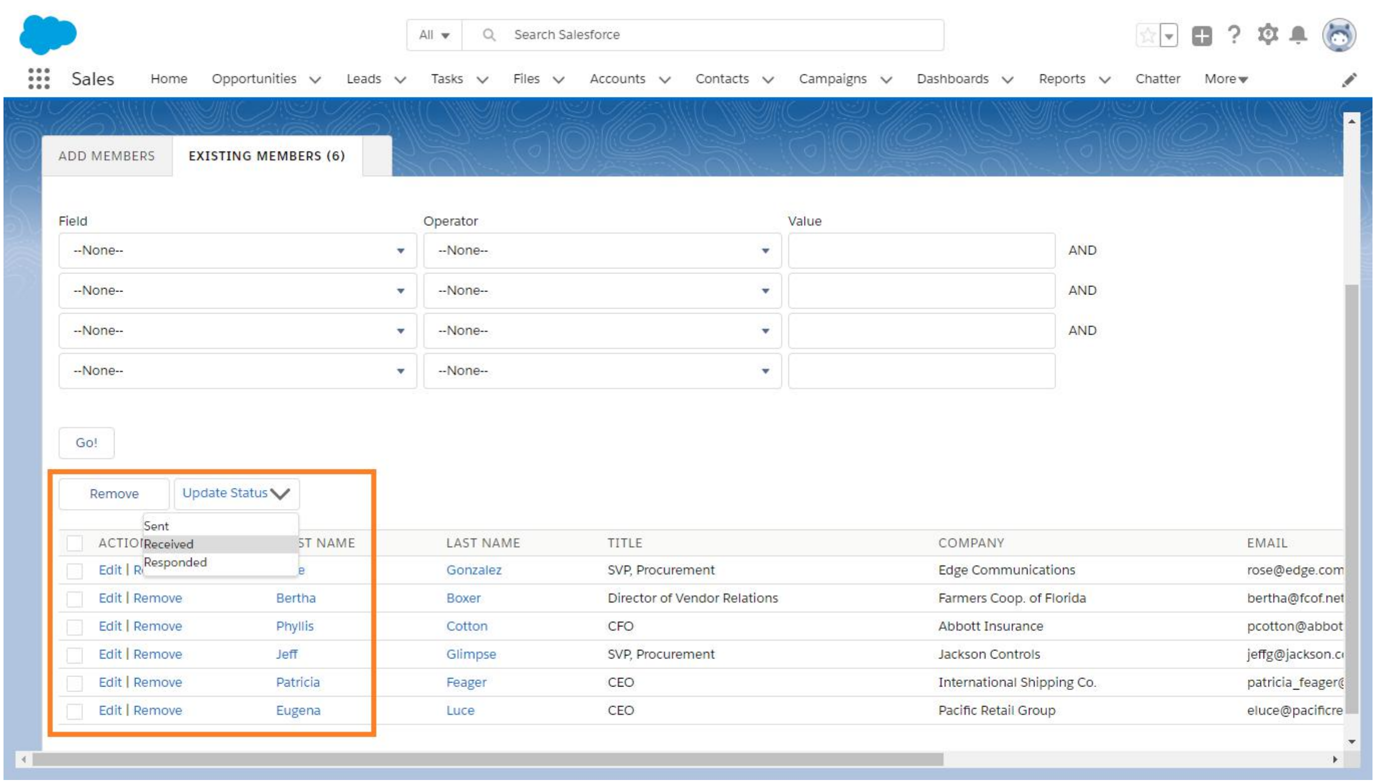


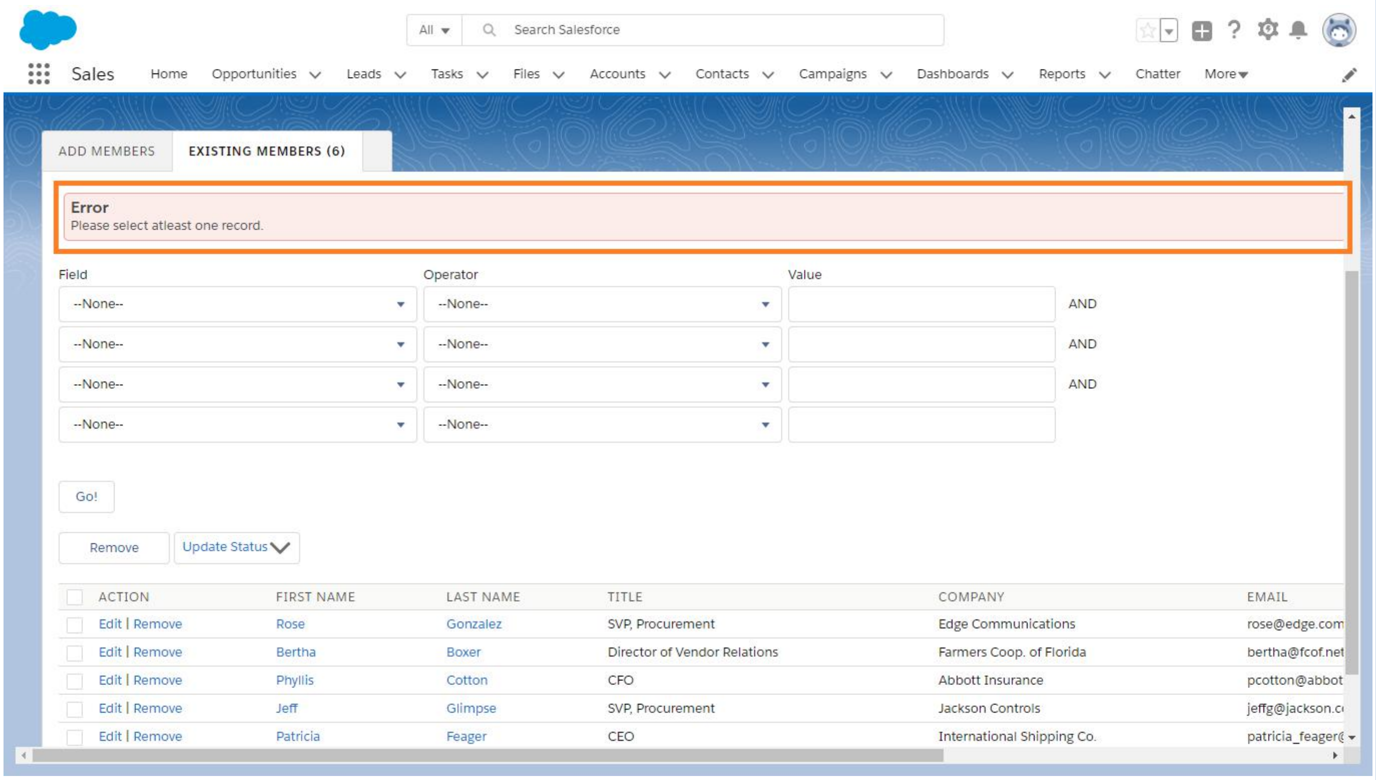
7. It also provides an ability to mass update status or remove campaign member(s).





8. It notifies an error if one selects Remove, Update Status and Add with Status button without selecting any record.




All
Search Salesforce
Sales
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Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
More
ADD MEMBERS
EXISTING MEMBERS (6)
Error
Please select atleast one record.
Field
Operator
Value
--None--
AND
Go!
Remove
Update Status
ACTION
FIRST NAME
LAST NAME
TITLE
COMPANY
EMAIL
Edit | Remove
Rose
Gonzalez
SVP, Procurement
Edge Communications
rose@edge.com
Bertha
Boxer
Director of Vendor Relations
Farmers Coop. of Florida
bertha@fcof.net
Phyllis
Cotton
CFO
Abbott Insurance
Jeff
Glimpse
SVP, Procurement
Jackson Controls
Patricia
Feager
CEO
International Shipping Co.