

# CAMPAIGN MEMBER HELPER



ASTREA IT SERVICES

[www.astreait.com](http://www.astreait.com)

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.

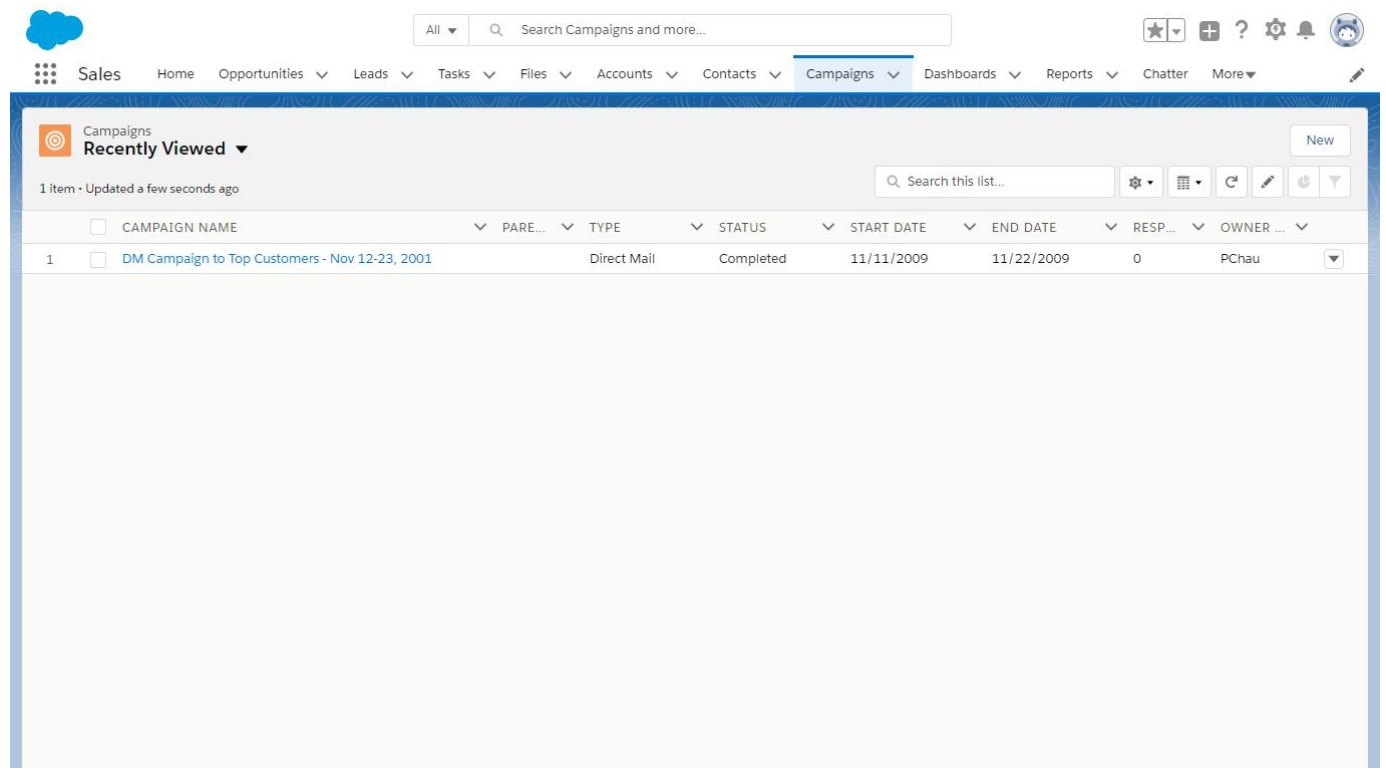
## KEY FEATURES

- 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



The screenshot displays the Salesforce interface for the 'Campaigns' section. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns' (selected), 'Dashboards', 'Reports', 'Chatter', and 'More'. A search bar is present with the text 'Search Campaigns and more...'. Below the navigation bar, the 'Campaigns' section is titled 'Recently Viewed' with a 'New' button. A search bar for the list is labeled 'Search this list...'. The list contains one item, 'DM Campaign to Top Customers - Nov 12-23, 2001', which is a 'Direct Mail' campaign that is 'Completed'. The table headers are: CAMPAIGN NAME, PARE..., TYPE, STATUS, START DATE, END DATE, RESP..., and OWNER ...

|   | CAMPAIGN NAME                                  | PARE... | TYPE        | STATUS    | START DATE | END DATE   | RESP... | OWNER ... |
|---|------------------------------------------------|---------|-------------|-----------|------------|------------|---------|-----------|
| 1 | DM Campaign to Top Customers - Nov 12-23, 2001 |         | Direct Mail | Completed | 11/11/2009 | 11/22/2009 | 0       | PChau     |





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        | Status    | Start Date | End Date   |
|-------------|-----------|------------|------------|
| Direct Mail | Completed | 11/11/2009 | 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        | STATUS    | START DATE | END DATE   |
|-------------|-----------|------------|------------|
| Direct Mail | Completed | 2009-11-11 | 2009-11-22 |

Back To Campaign

ADD MEMBERS

EXISTING MEMBERS (4)

Step 1. Choose Member Type To Search

Lead

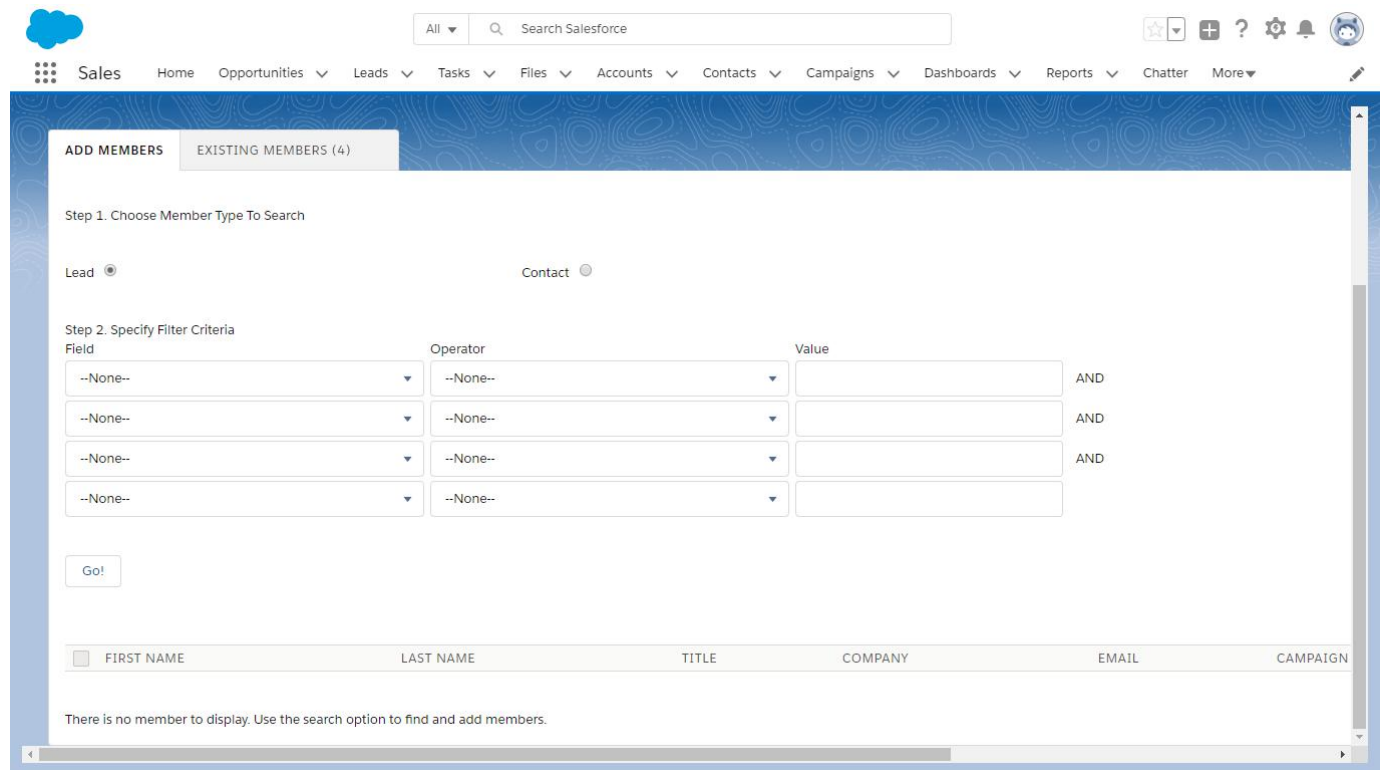
Contact

Step 2. Specify Filter Criteria

| Field    | Operator | Value |     |
|----------|----------|-------|-----|
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       |     |



Campaign Member Helper  
Astrea IT Services



This screenshot shows the 'ADD MEMBERS' tab of the Campaign Member Helper in Salesforce. The interface is divided into two main steps. Step 1, 'Choose Member Type To Search', has two radio buttons: 'Lead' (which is selected) and 'Contact'. Step 2, 'Specify Filter Criteria', contains a table with four rows for filtering. Each row has a 'Field' dropdown (all set to '--None--'), an 'Operator' dropdown (all set to '--None--'), a 'Value' text input, and an 'AND' checkbox. Below the table is a 'Go!' button. At the bottom, there is a table header with columns: FIRST NAME, LAST NAME, TITLE, COMPANY, EMAIL, and CAMPAIGN. A message at the bottom states: 'There is no member to display. Use the search option to find and add members.'

**ADD MEMBERS** **EXISTING MEMBERS (4)**

Step 1. Choose Member Type To Search

Lead ☒ Contact ☐

Step 2. Specify Filter Criteria

| Field    | Operator | Value |     |
|----------|----------|-------|-----|
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       |     |

Go!

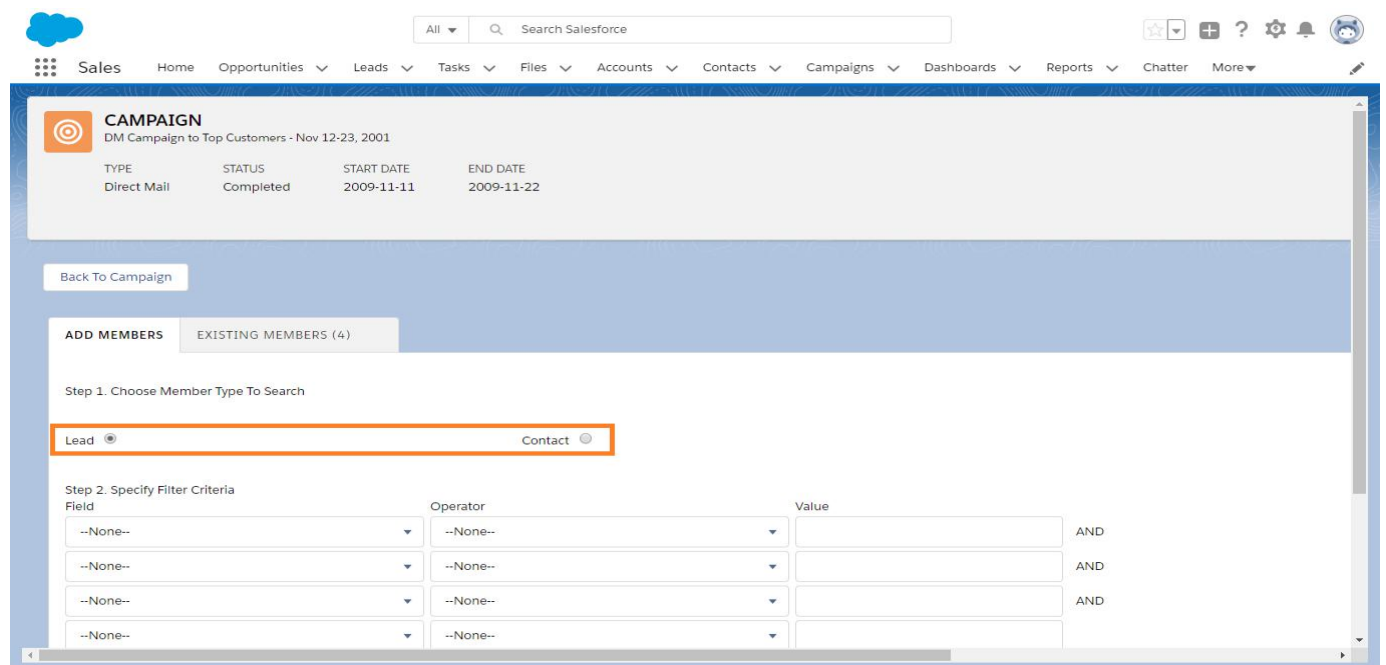
| FIRST NAME | LAST NAME | TITLE | COMPANY | EMAIL | CAMPAIGN |
|------------|-----------|-------|---------|-------|----------|
|------------|-----------|-------|---------|-------|----------|

There is no member to display. Use the search option to find and add members.

## 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 one wants to add a Lead or a Contact.



This screenshot shows the 'ADD MEMBERS' tab of the Campaign Member Helper in Salesforce, but it is now within a campaign context. At the top, there is a campaign header for 'CAMPAIGN' (DM Campaign to Top Customers - Nov 12-23, 2001) with details for TYPE (Direct Mail), STATUS (Completed), START DATE (2009-11-11), and END DATE (2009-11-22). Below this is a 'Back To Campaign' button. The 'ADD MEMBERS' tab is active, and the 'EXISTING MEMBERS (4)' tab is also visible. Step 1, 'Choose Member Type To Search', has two radio buttons: 'Lead' and 'Contact'. The 'Lead' radio button is selected and highlighted with an orange border. Step 2, 'Specify Filter Criteria', contains a table with four rows for filtering. Each row has a 'Field' dropdown (all set to '--None--'), an 'Operator' dropdown (all set to '--None--'), a 'Value' text input, and an 'AND' checkbox. Below the table is a 'Go!' button. At the bottom, there is a table header with columns: FIRST NAME, LAST NAME, TITLE, COMPANY, EMAIL, and CAMPAIGN. A message at the bottom states: 'There is no member to display. Use the search option to find and add members.'

**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-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       |     |

Go!

| FIRST NAME | LAST NAME | TITLE | COMPANY | EMAIL | CAMPAIGN |
|------------|-----------|-------|---------|-------|----------|
|------------|-----------|-------|---------|-------|----------|

There is no member to display. Use the search option to find and add members.

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

The screenshot shows the Campaign Member Helper interface. At the top, there's a navigation bar with the Salesforce logo and a search bar. Below it, a menu bar lists various Salesforce sections: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and More. The main content area is titled "Step 1. Choose Member Type To Search". It has two radio buttons: "Lead" (selected) and "Contact". Below this is "Step 2. Specify Filter Criteria". It features a table with columns: Field, Operator, Value, and a logical connector (AND/OR). The first row has "Title" as the field, "equals" as the operator, and "CEO" as the value. The other three rows have "--None--" for all three fields. Below the filter table is a "Go!" button, which is highlighted with an orange box. Underneath the "Go!" button is an "Add with Status" dropdown. At the bottom, there's a table with 5 columns: FIRST NAME, LAST NAME, TITLE, COMPANY, and EMAIL. It contains two records: Patricia Feager (CEO, International Shipping Co.) and Eugena Luce (CEO, Pacific Retail Group). At the very bottom, there are navigation buttons: "< Previous", "2 records · page 1 / 1", and "Next >".

Step 1. Choose Member Type To Search

Lead ☒ Contact ☐

Step 2. Specify Filter Criteria

| Field    | Operator | Value |     |
|----------|----------|-------|-----|
| Title    | equals   | CEO   | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       |     |

**Go!**

Add with Status

| <input type="checkbox"/> | FIRST NAME | LAST NAME | TITLE | COMPANY                    | EMAIL                   |
|--------------------------|------------|-----------|-------|----------------------------|-------------------------|
| <input type="checkbox"/> | Patricia   | Feager    | CEO   | International Shipping Co. | patricia_feager@is.com  |
| <input type="checkbox"/> | Eugena     | Luce      | CEO   | Pacific Retail Group       | eluce@pacificretail.com |

< Previous 2 records · page 1 / 1 Next >

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

This screenshot is similar to the previous one, but the "Go!" button is no longer highlighted. In this view, the checkboxes in the table at the bottom are checked for both records: Patricia Feager and Eugena Luce. The rest of the interface, including the navigation bar, menu, and filter criteria, remains the same.

Step 1. Choose Member Type To Search

Lead ☒ Contact ☐

Step 2. Specify Filter Criteria

| Field    | Operator | Value |     |
|----------|----------|-------|-----|
| Title    | equals   | CEO   | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       |     |

Go!

Add with Status

| <input checked="" type="checkbox"/> | FIRST NAME | LAST NAME | TITLE | COMPANY                    | EMAIL                   |
|-------------------------------------|------------|-----------|-------|----------------------------|-------------------------|
| <input checked="" type="checkbox"/> | Patricia   | Feager    | CEO   | International Shipping Co. | patricia_feager@is.com  |
| <input checked="" type="checkbox"/> | Eugena     | Luce      | CEO   | Pacific Retail Group       | eluce@pacificretail.com |

< Previous 2 records · page 1 / 1 Next >

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

The screenshot shows the Salesforce interface for adding members to a campaign. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', and 'More'. The main content area is titled 'Step 1. Choose Member Type To Search' and 'Step 2. Specify Filter Criteria'. The 'Lead' tab is selected. The filter criteria table shows 'Title' equals 'CEO'. The 'Add with Status' dropdown menu is open, showing 'Sent', 'Received', and 'Responded' options. Below the dropdown, a table lists two records: Patricia Feager (CEO, International Shipping Co.) and Eugena Luce (CEO, Pacific Retail Group). The bottom navigation bar shows 'Previous', '2 records · page 1 / 1', and 'Next'.

| Field    | Operator | Value | AND |
|----------|----------|-------|-----|
| Title    | equals   | CEO   | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       |     |

|                                              | LAST NAME | TITLE | COMPANY                    | EMAIL                   |
|----------------------------------------------|-----------|-------|----------------------------|-------------------------|
| <input checked="" type="checkbox"/> Patricia | Feager    | CEO   | International Shipping Co. | patricia_feager@is.com  |
| <input checked="" type="checkbox"/> Eugena   | Luce      | CEO   | Pacific Retail Group       | eluce@pacificretail.com |

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.

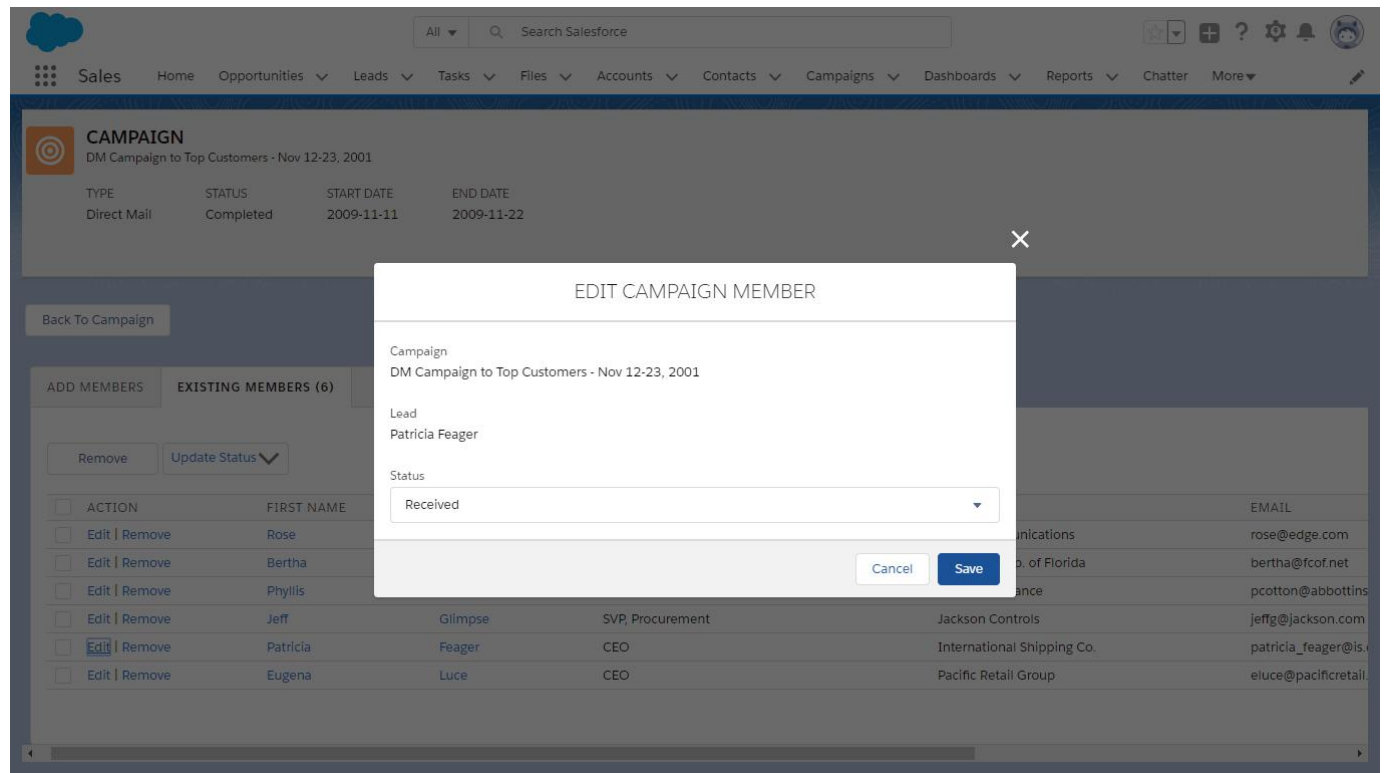
The screenshot shows the Salesforce interface for viewing existing members of a campaign. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'CAMPAIGN' and 'DM Campaign to Top Customers - Nov 12-23, 2001'. The campaign details table shows 'TYPE: Direct Mail', 'STATUS: Completed', 'START DATE: 2009-11-11', and 'END DATE: 2009-11-22'. The 'Back To Campaign' button is visible. The 'ADD MEMBERS' tab is selected, and the 'EXISTING MEMBERS (6)' tab is active. The 'Remove' button is visible. The 'Update Status' dropdown menu is open. Below the dropdown, a table lists six records: Rose Gonzalez (SVP, Procurement, Edge Communications), Bertha Boxer (Director of Vendor Relations, Farmers Coop. of Florida), Phyllis Cotton (CFO, Abbott Insurance), Jeff Gilmpse (SVP, Procurement, Jackson Controls), Patricia Feager (CEO, International Shipping Co.), and Eugena Luce (CEO, Pacific Retail Group). The bottom record is highlighted with an orange box.

|  | TYPE        | STATUS    | START DATE | END DATE   |
|--|-------------|-----------|------------|------------|
|  | Direct Mail | Completed | 2009-11-11 | 2009-11-22 |

|                          | ACTION        | FIRST NAME | LAST NAME | TITLE                        | COMPANY                    | EMAIL                   |
|--------------------------|---------------|------------|-----------|------------------------------|----------------------------|-------------------------|
| <input type="checkbox"/> | Edit   Remove | Rose       | Gonzalez  | SVP, Procurement             | Edge Communications        | rose@edge.com           |
| <input type="checkbox"/> | Edit   Remove | Bertha     | Boxer     | Director of Vendor Relations | Farmers Coop. of Florida   | bertha@fcof.net         |
| <input type="checkbox"/> | Edit   Remove | Phyllis    | Cotton    | CFO                          | Abbott Insurance           | pcotton@abbottins.com   |
| <input type="checkbox"/> | Edit   Remove | Jeff       | Gilmpse   | SVP, Procurement             | Jackson Controls           | jeffg@jackson.com       |
| <input type="checkbox"/> | Edit   Remove | Patricia   | Feager    | CEO                          | International Shipping Co. | patricia_feager@is.com  |
| <input type="checkbox"/> | Edit   Remove | Eugena     | Luce      | CEO                          | Pacific Retail Group       | eluce@pacificretail.com |

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

[Edit](#) | [Remove](#)

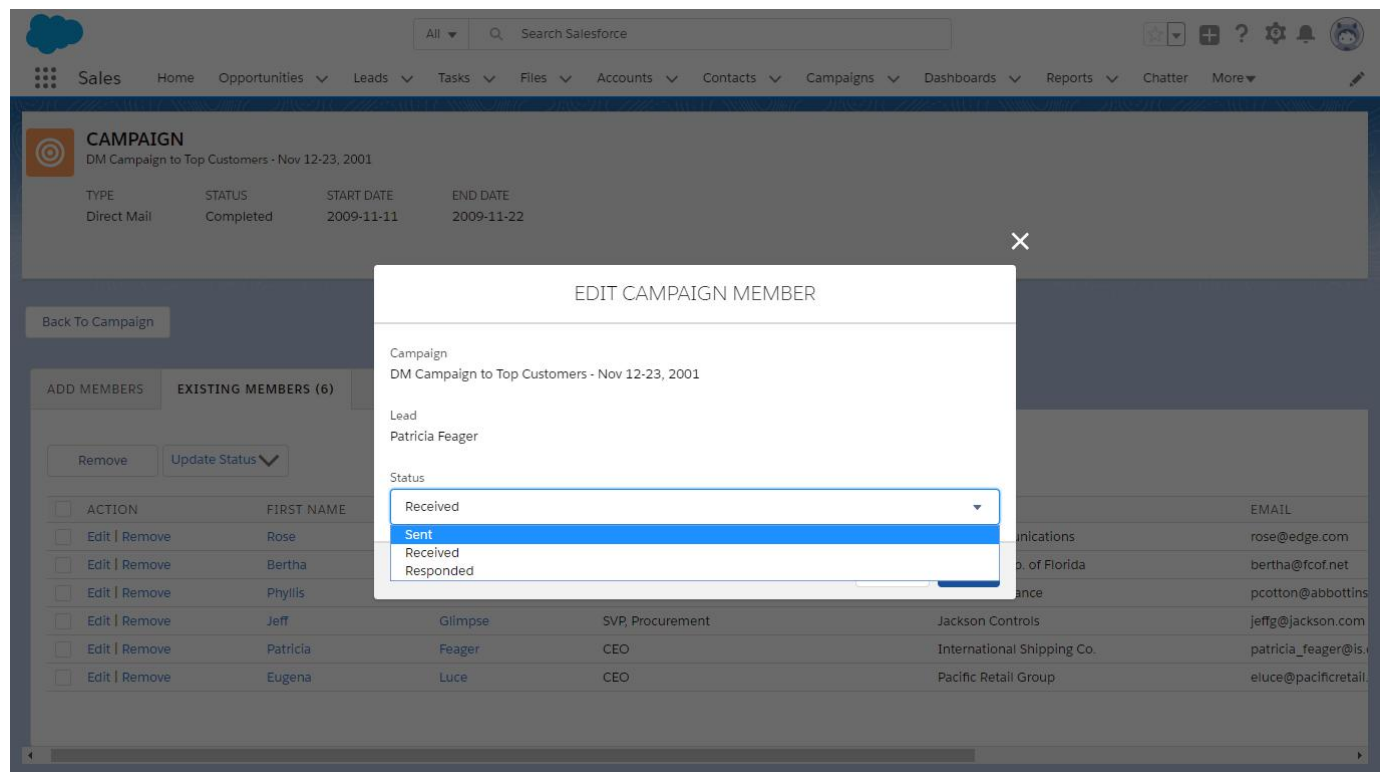


This screenshot shows the Salesforce Campaign Member edit dialog. The dialog is titled "EDIT CAMPAIGN MEMBER" and contains the following information:

- Campaign: DM Campaign to Top Customers - Nov 12-23, 2001
- Lead: Patricia Feager
- Status: Received (selected from a dropdown menu)

The dialog has "Cancel" and "Save" buttons. In the background, a table of existing campaign members is visible:

| ACTION                                 | FIRST NAME      | EMAIL                |
|----------------------------------------|-----------------|----------------------|
| <input type="checkbox"/> Edit   Remove | Rose            | rose@edge.com        |
| <input type="checkbox"/> Edit   Remove | Bertha          | bertha@fcof.net      |
| <input type="checkbox"/> Edit   Remove | Phyllis         | pcotton@abbottins    |
| <input type="checkbox"/> Edit   Remove | Jeff            | jeffg@jackson.com    |
| <input type="checkbox"/> Edit   Remove | Patricia Feager | patricia_feager@is.  |
| <input type="checkbox"/> Edit   Remove | Eugena Luce     | eluce@pacificretail. |



This screenshot shows the same Salesforce Campaign Member edit dialog, but with the status dropdown menu open. The dropdown menu displays the following options:

- Received
- Sent** (highlighted)
- Received
- Responded

The background table of existing campaign members remains the same as in the previous screenshot.

**CAMPAIGN**  
DM Campaign to Top Customers - Nov 12-23, 2001

| TYPE        | STATUS    | START DATE | END DATE   |
|-------------|-----------|------------|------------|
| Direct Mail | Completed | 2009-11-11 | 2009-11-22 |

Back To Campaign

ADD MEMBERS EXISTING MEMBERS (6)

Remove Update Status

DELETE CAMPAIGN MEMBER

Are you sure you want to remove this Campaign Member Record?

Cancel Delete

| ACTION                                 | FIRST NAME | LAST NAME | TITLE                        | COMPANY                    | EMAIL               |
|----------------------------------------|------------|-----------|------------------------------|----------------------------|---------------------|
| <input type="checkbox"/> Edit   Remove | Rose       | Gonzalez  | SVP, Procurement             | Edge Communications        | rose@edge.com       |
| <input type="checkbox"/> Edit   Remove | Bertha     | Boxer     | Director of Vendor Relations | Farmers Coop. of Florida   | bertha@fcf.net      |
| <input type="checkbox"/> Edit   Remove | Phyllis    | Cotton    | CFO                          | Abbott Insurance           | pcotton@abbottins   |
| <input type="checkbox"/> Edit   Remove | Jeff       | Glimpse   | SVP, Procurement             | Jackson Controls           | jeffg@jackson.com   |
| <input type="checkbox"/> Edit   Remove | Patricia   | Feager    | CEO                          | International Shipping Co. | patricia_feager@is  |
| <input type="checkbox"/> Edit   Remove | Eugena     | Luce      | CEO                          | Pacific Retail Group       | eluce@pacificretail |

javascript:void(0);

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

**CAMPAIGN**  
DM Campaign to Top Customers - Nov 12-23, 2001

| TYPE        | STATUS    | START DATE | END DATE   |
|-------------|-----------|------------|------------|
| Direct Mail | Completed | 2009-11-11 | 2009-11-22 |

Back To Campaign

ADD MEMBERS EXISTING MEMBERS (6)

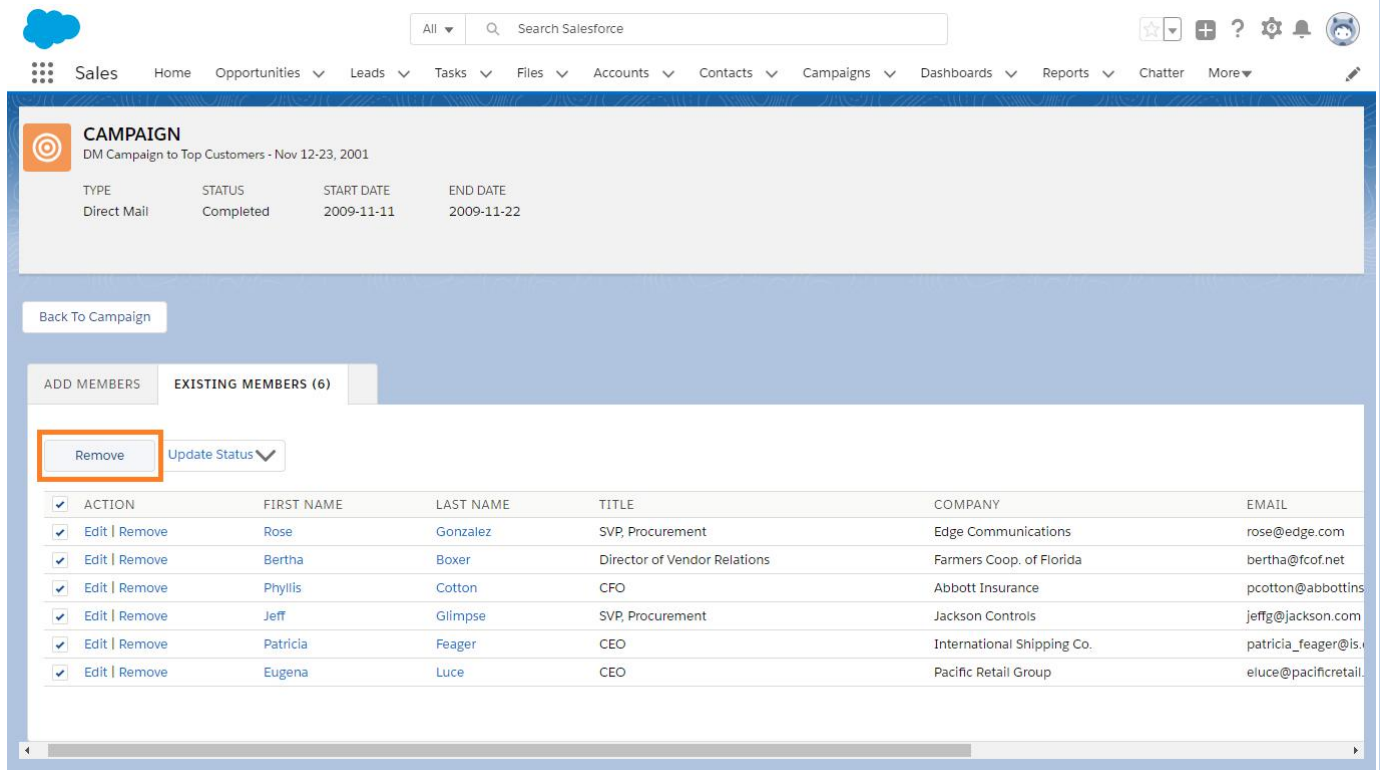
Remove Update Status

Sent

Received

Responded

| ACTION                                            | FIRST NAME | LAST NAME | TITLE                        | COMPANY                    | EMAIL               |
|---------------------------------------------------|------------|-----------|------------------------------|----------------------------|---------------------|
| <input checked="" type="checkbox"/> Edit   Remove | Rose       | Gonzalez  | SVP, Procurement             | Edge Communications        | rose@edge.com       |
| <input checked="" type="checkbox"/> Edit   Remove | Bertha     | Boxer     | Director of Vendor Relations | Farmers Coop. of Florida   | bertha@fcf.net      |
| <input checked="" type="checkbox"/> Edit   Remove | Phyllis    | Cotton    | CFO                          | Abbott Insurance           | pcotton@abbottins   |
| <input checked="" type="checkbox"/> Edit   Remove | Jeff       | Glimpse   | SVP, Procurement             | Jackson Controls           | jeffg@jackson.com   |
| <input checked="" type="checkbox"/> Edit   Remove | Patricia   | Feager    | CEO                          | International Shipping Co. | patricia_feager@is  |
| <input checked="" type="checkbox"/> Edit   Remove | Eugena     | Luce      | CEO                          | Pacific Retail Group       | eluce@pacificretail |

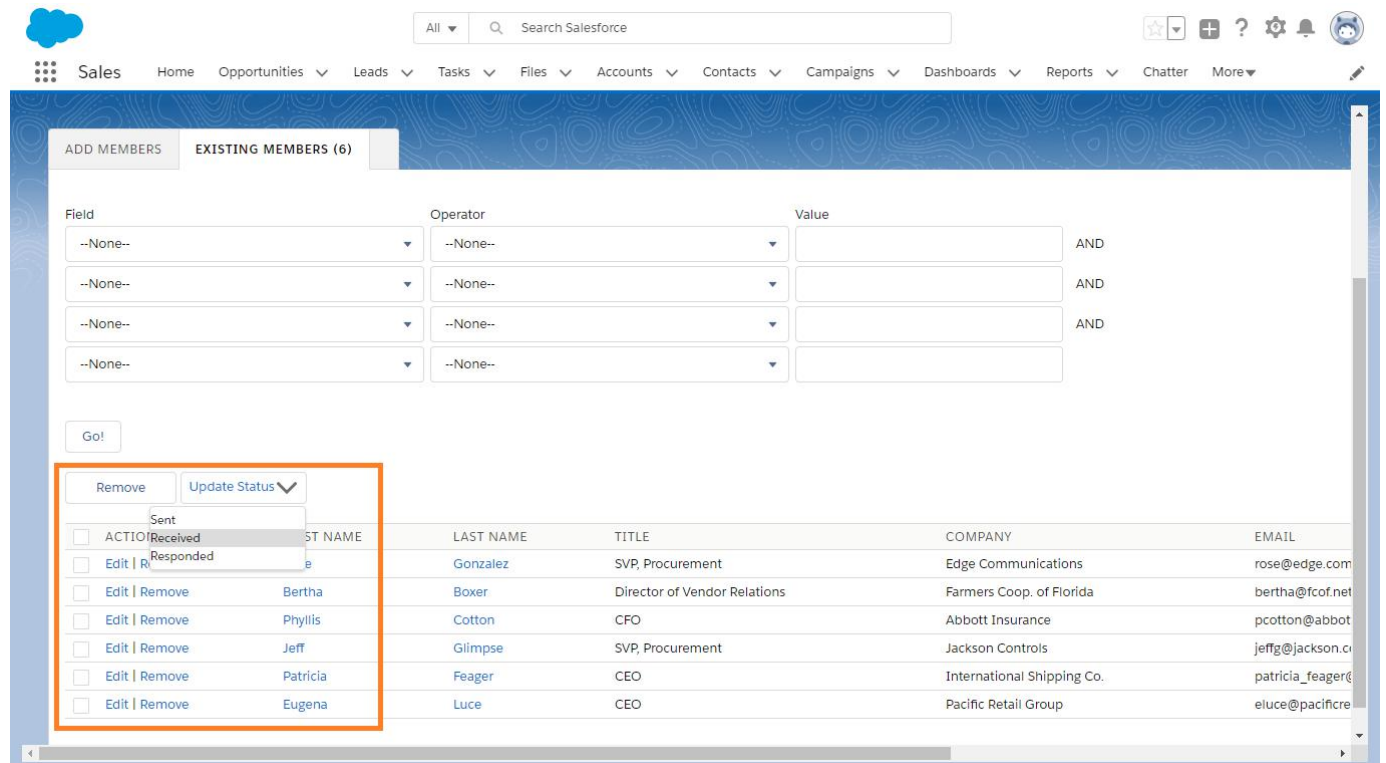


This screenshot shows the Salesforce Campaign Member Helper interface. At the top, there's a navigation bar with the Salesforce logo and a search bar. Below it, a campaign summary for "DM Campaign to Top Customers - Nov 12-23, 2001" is displayed, showing it's a "Direct Mail" campaign that is "Completed" from "2009-11-11" to "2009-11-22".

The main section is titled "EXISTING MEMBERS (6)". It features a "Remove" button (highlighted with an orange box) and an "Update Status" dropdown menu. Below these is a table of 6 members:

|                                     | ACTION        | FIRST NAME | LAST NAME | TITLE                        | COMPANY                    | EMAIL                   |
|-------------------------------------|---------------|------------|-----------|------------------------------|----------------------------|-------------------------|
| <input checked="" type="checkbox"/> | Edit   Remove | Rose       | Gonzalez  | SVP, Procurement             | Edge Communications        | rose@edge.com           |
| <input checked="" type="checkbox"/> | Edit   Remove | Bertha     | Boxer     | Director of Vendor Relations | Farmers Coop. of Florida   | bertha@fcf.net          |
| <input checked="" type="checkbox"/> | Edit   Remove | Phyllis    | Cotton    | CFO                          | Abbott Insurance           | pcotton@abbottins.com   |
| <input checked="" type="checkbox"/> | Edit   Remove | Jeff       | Glimpse   | SVP, Procurement             | Jackson Controls           | jeffg@jackson.com       |
| <input checked="" type="checkbox"/> | Edit   Remove | Patricia   | Feager    | CEO                          | International Shipping Co. | patricia_feager@is.com  |
| <input checked="" type="checkbox"/> | Edit   Remove | Eugena     | Luce      | CEO                          | Pacific Retail Group       | eluce@pacificretail.com |

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



This screenshot shows the same Salesforce Campaign Member Helper interface, but with the "Add with Status" section expanded. It displays four rows for adding new members, each with "Field", "Operator", and "Value" dropdowns, and an "AND" connector. Below this is a "Go!" button.

The "Remove" button (highlighted with an orange box) is now active, and a dropdown menu is open, showing options: "Sent", "Received", and "Responded". The table of existing members is still visible below the dropdown.

|                          | ACTION        | FIRST NAME | LAST NAME | TITLE                        | COMPANY                    | EMAIL                  |
|--------------------------|---------------|------------|-----------|------------------------------|----------------------------|------------------------|
| <input type="checkbox"/> | Edit   Remove | Rose       | Gonzalez  | SVP, Procurement             | Edge Communications        | rose@edge.com          |
| <input type="checkbox"/> | Edit   Remove | Bertha     | Boxer     | Director of Vendor Relations | Farmers Coop. of Florida   | bertha@fcf.net         |
| <input type="checkbox"/> | Edit   Remove | Phyllis    | Cotton    | CFO                          | Abbott Insurance           | pcotton@abbot.com      |
| <input type="checkbox"/> | Edit   Remove | Jeff       | Glimpse   | SVP, Procurement             | Jackson Controls           | jeffg@jackson.com      |
| <input type="checkbox"/> | Edit   Remove | Patricia   | Feager    | CEO                          | International Shipping Co. | patricia_feager@is.com |
| <input type="checkbox"/> | Edit   Remove | Eugena     | Luce      | CEO                          | Pacific Retail Group       | eluce@pacificre.com    |



All



Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

More



ADD MEMBERS

EXISTING MEMBERS (6)

Error

Please select atleast one record.

| Field    | Operator | Value |     |
|----------|----------|-------|-----|
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       | AND |
| --None-- | --None-- |       |     |

Go!

Remove

Update Status

| <input type="checkbox"/> | ACTION        | FIRST NAME | LAST NAME | TITLE                        | COMPANY                    | EMAIL             |
|--------------------------|---------------|------------|-----------|------------------------------|----------------------------|-------------------|
| <input type="checkbox"/> | Edit   Remove | Rose       | Gonzalez  | SVP, Procurement             | Edge Communications        | rose@edge.com     |
| <input type="checkbox"/> | Edit   Remove | Bertha     | Boxer     | Director of Vendor Relations | Farmers Coop. of Florida   | bertha@fcof.net   |
| <input type="checkbox"/> | Edit   Remove | Phyllis    | Cotton    | CFO                          | Abbott Insurance           | pcotton@abbot     |
| <input type="checkbox"/> | Edit   Remove | Jeff       | Glimpse   | SVP, Procurement             | Jackson Controls           | jefftg@jackson.ci |
| <input type="checkbox"/> | Edit   Remove | Patricia   | Feager    | CEO                          | International Shipping Co. | patricia_feager@  |



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