Campaign Member Management

Flow Solution from Salesforce Labs

Version 1.0 - September 2019

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Why should you use Campaign Member Management?

Campaign Member Management provides a simpler way to find and update your Campaign Member Statuses. This helps improve your marketing team's reports, and ensures your sales team knows who and how to follow-up after a campaign ends.

Imagine you're putting on a marketing event - it could be something small, like a "lunch & learn" session, or something large, like a conference. Your marketing team has gone through a great deal of effort to drive registration to this event, and has been diligent about adding the Leads & Contacts to the Campaign in Salesforce so we know who to expect (managing the invite process on campaigns is easy when you use online registration forms - something Pardot can help with - but that's a story for another day!).

However, as people arrive to your event, how are you keeping track? Using a paper form, or spreadsheet, and updating manually afterwards? Or worse - by memory?

😬Yuck.

We thought there's got to be a better way to capture your Campaign Member Status updates as they arrive (or don't!) at your event, and we designed this Flow Template & Lightning Component to help your team make updates in a simple, real-time method.

Let's get started!

Installation Guide

Please Note

- You must be on Enterprise Edition or higher to provide access to use of Flow Builder.

- This Flow includes custom Lightning Components, so it is only going to work in Lightning Experience. "My Domain" must be enabled for the Lightning Components to be visible.

- These instructions assume you're a System Admin with the permissions necessary to perform the instructions outlined below. If you're not, provide this guide to a System Admin at your company and ask for their help!

Installation Instructions

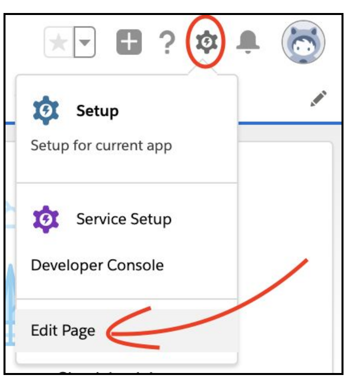
1. Go to the AppExchange listing for Campaign Member Management and click ***Get it now!***

   ⚠*We strongly encourage the best practice of installing and testing apps like this one in your Sandbox environment prior to use in your Production environment*

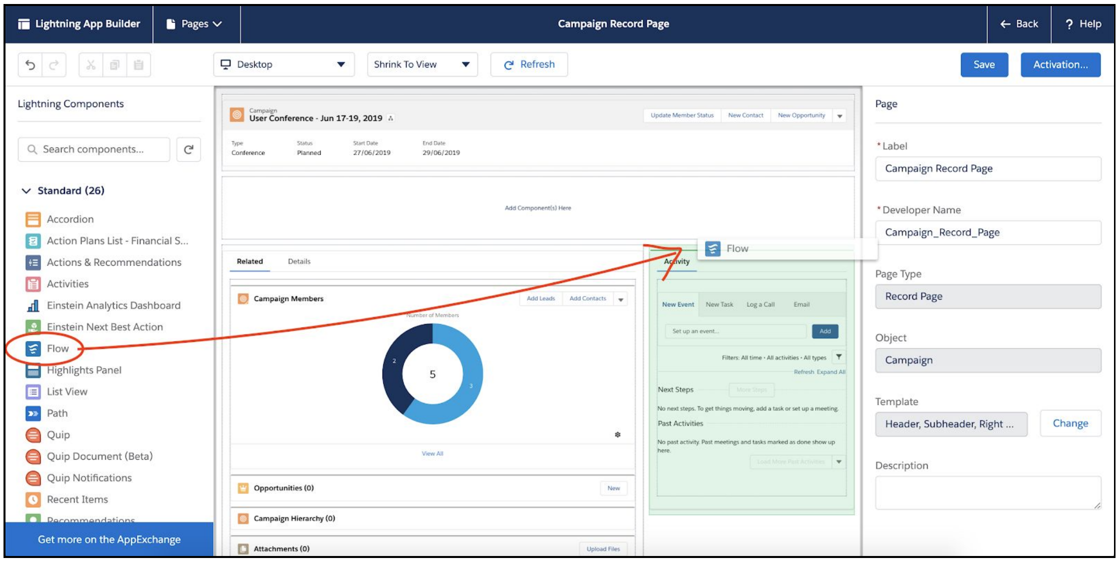
2. Select ***Install for All Users*** and wait patiently for the package to install in your org. Go grab a coffee, but come back soon - it shouldn't take too long.

3. Go to ***Set Up*** → ***Process Automation*** → ***Flows*** and ensure that the flows called "Campaign Member Management: Quick Entry" is ACTIVE ✔️

4. Let's add the Flow to our Campaign page layout so we can use this on the desktop. Navigate to a Campaign record, and go to the ***Setup*** icon, then click ***Edit Page***:

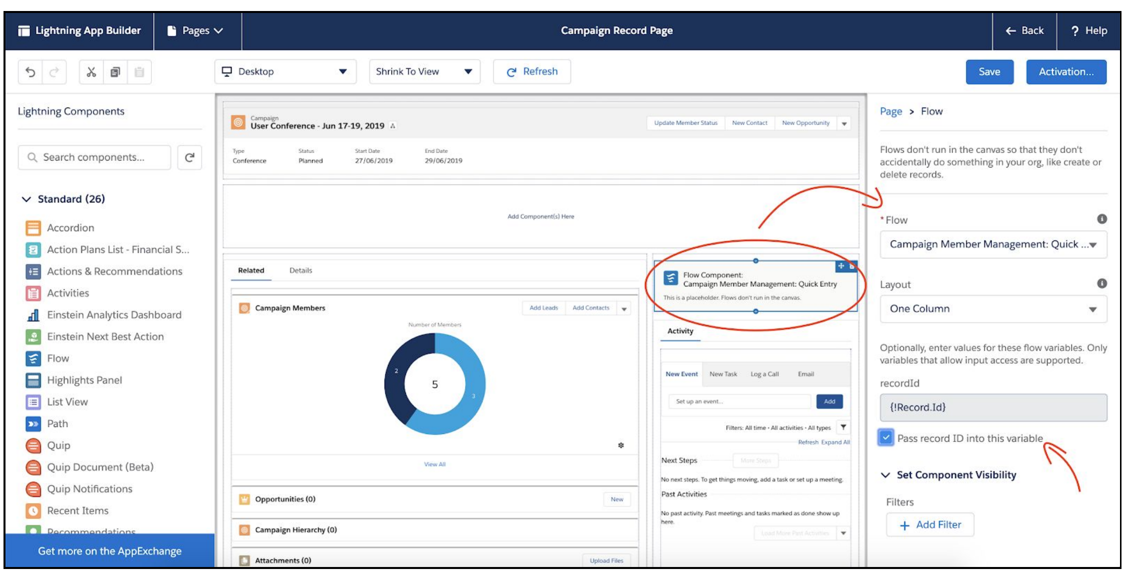


5. Drag and drop ***Flow*** component from the list of Standard Components on the left navigation section on to the desired section of your page. We think the Campaign Member Management tool works well as a side component, so we're going to drop it here on the right section of the Campaign page:



6. Click on the Flow component that you just added to your page. You should see the Flow component's settings in the right panel. Adjust accordingly:

- ***Flow*** → "Campaign Member Management: Quick Entry"
- ***Layout*** → "One Column"
- ***recordId*** → Check ✔️ "Pass record ID into this variable"

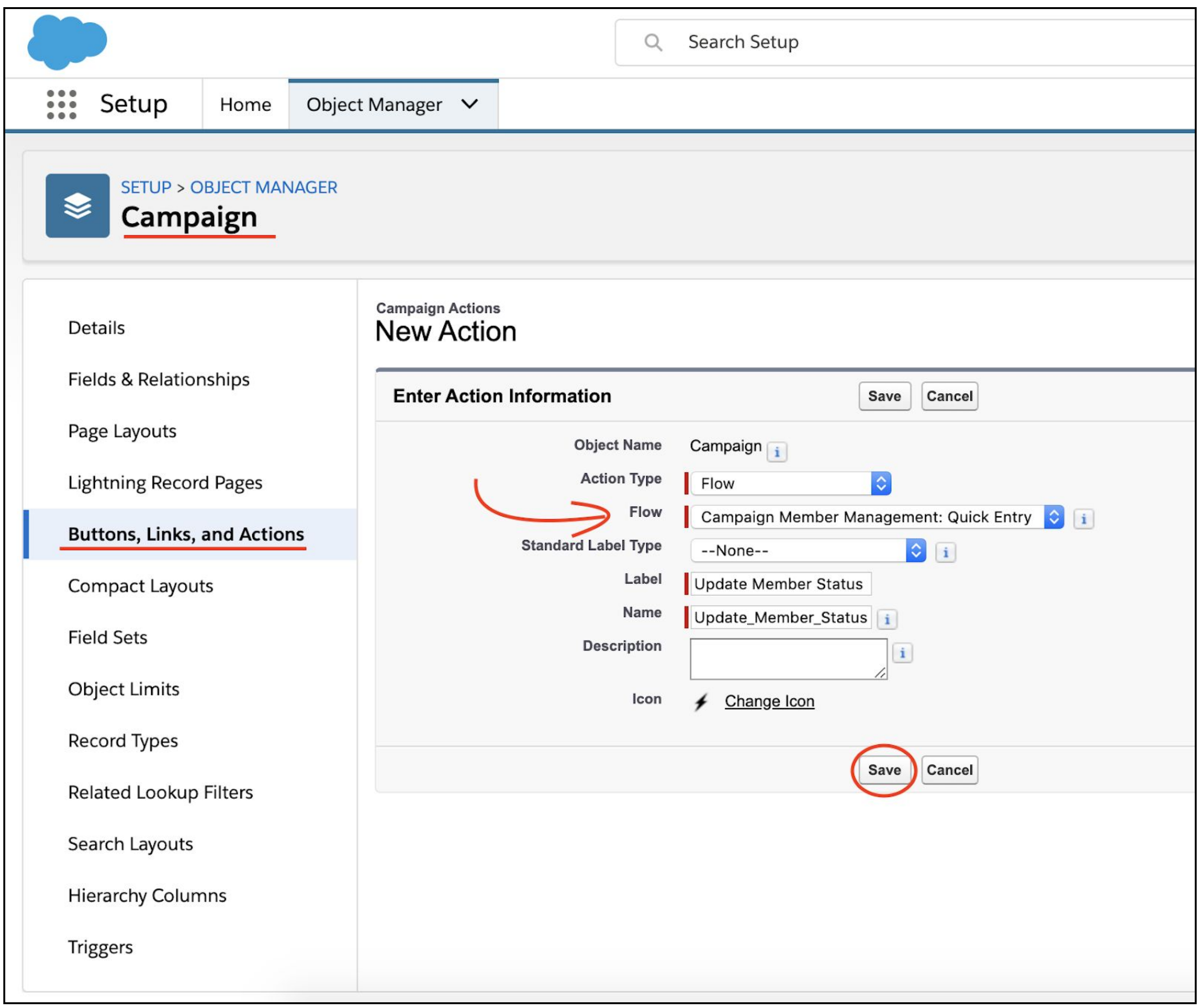


7. Once you're done specifying these details, click ***Save***.
   If prompted, set the page Activation settings.

8. (📌*These instructions are optional, but recommended for mobile app use)*
   We can also add this Flow as a Quick Action on the Campaign, which provides easy access from the Salesforce mobile app.

   Go to ***Setup → Object Manager → Campaigns → Buttons, Links, and Actions → New Action***

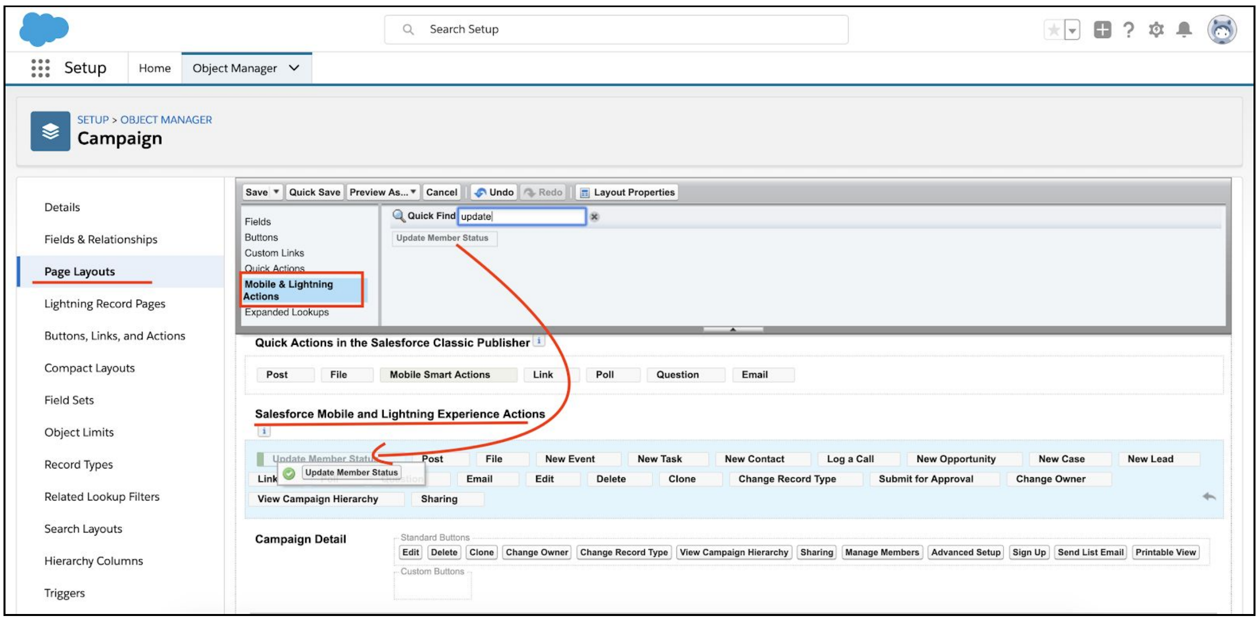
9. Define the following details for your New Action, and then click ***Save***:
   - ***Action Type*** → "Flow"
   - ***Flow*** → "Campaign Member Management: Quick Entry"
   - ***Label*** → "Update Member Status" *(or whatever you'd prefer it to be - it's up to you!)*
   - ***Name*** → This should update automatically based on your Label



10. Add your Action to the Campaign page layout:

    Go to ***Page Layouts*** and drag-and-drop your new “Update Member Status” Action onto your page layout section called ***Salesforce Mobile and Lightning Experience Actions***.

    Don’t forget to click ***Save*** when you’re done!

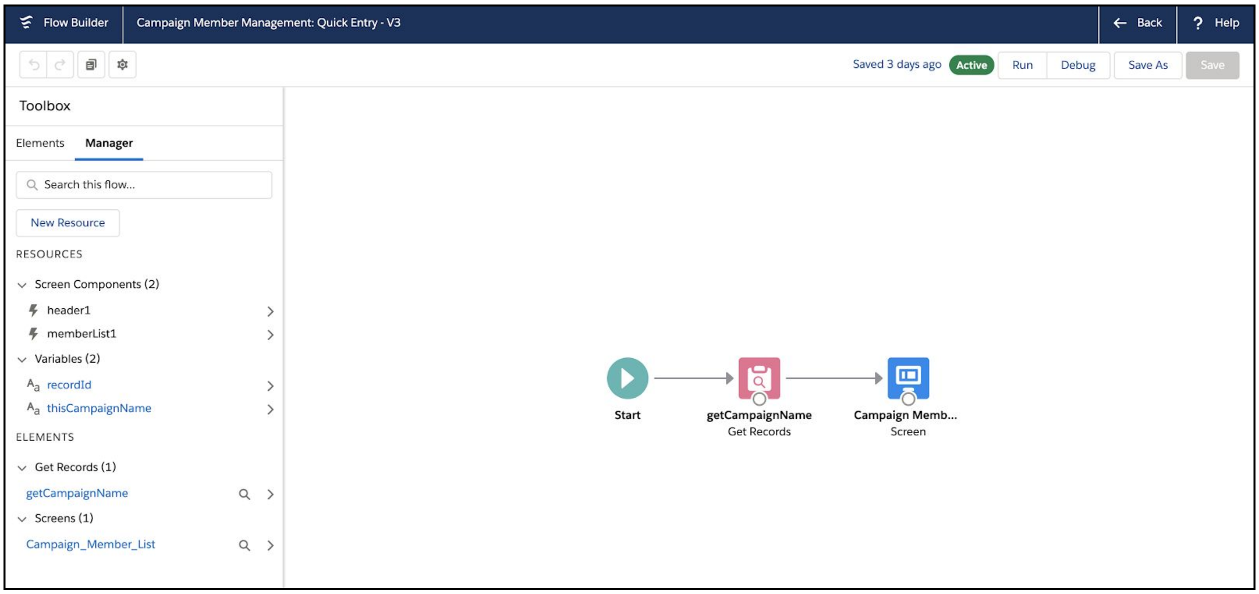


Great work! 👏 You’ve finished the installation.

Let’s take it for a spin… (Continue to the User Guide)

View from behind the scenes: Flow Builder

Below is a screenshot for your reference of what the Flow for the Campaign Member Management: Quick Entry looks like. *You can use Flow this as-is with no modification, or build on the Flow Template if you wish.*



If you're just getting started learning about Flow Builder, check out the [Trailhead Module: Flow Builder.]

User Guide

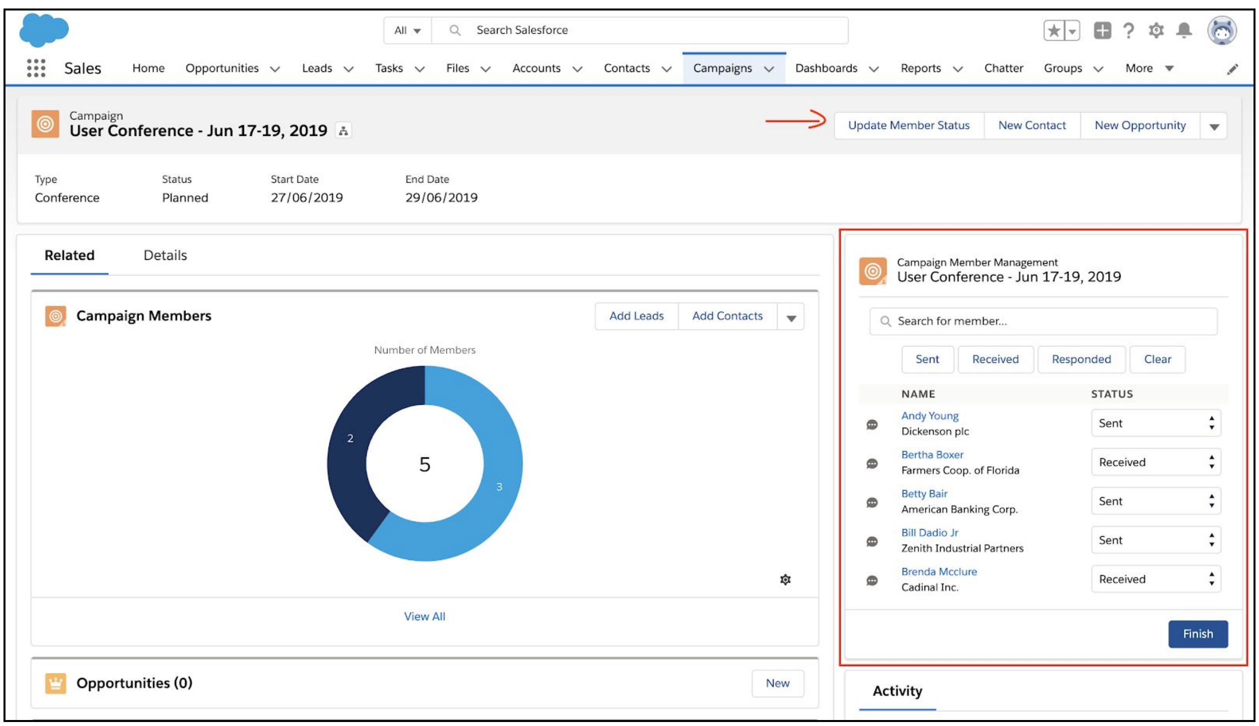
The Campaign Member Management Flow can be used from your desktop browser, or from the Salesforce mobile app. The functionality of the tool is the same, but how you access it to begin with is a little different.

Access from your desktop browser

(A) Go to your Campaign record detail page, and you should see the Campaign Member Management on the right section.

(B) If you want to go the long route instead, you can also click on the "Update Member Status" button and you'll see the same screen pop up.

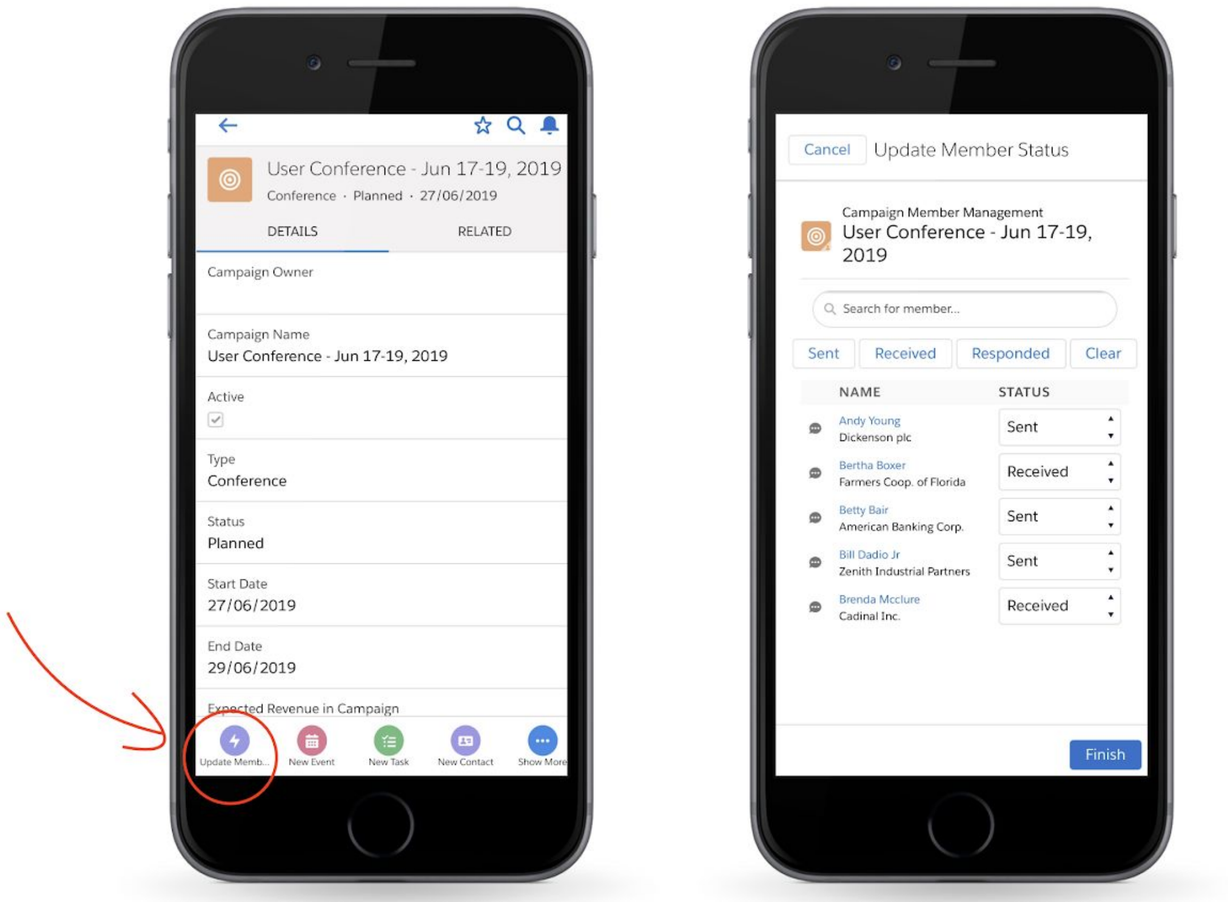
(📌Tip: If you don't see it in either suggested location, ask your Salesforce Admin where they have placed it on your page layout)



Access from your Salesforce mobile app

(A) Go to your Campaign record detail page from the Salesforce mobile app, and you should see the “Update Member Status” action at the bottom of the page.

Click it, and you’ll see the Campaign Member Management tool:



📌Usage Tips: In any view (mobile or desktop), you’ll notice your Campaign Member Statuses across the top of the list. These buttons allow you to quickly filter the list by status. You can click ***Clear*** to reset.

The ***Search*** allows you to type a Contact Member’s (Lead/Contact) name to quickly find them to update their status. This is so much faster than flipping through an attendance sheet of paper!

The ***Status*** shown beside each Campaign Member (Lead/Contact) name can be adjusted. Click ***Finish*** to save your changes.