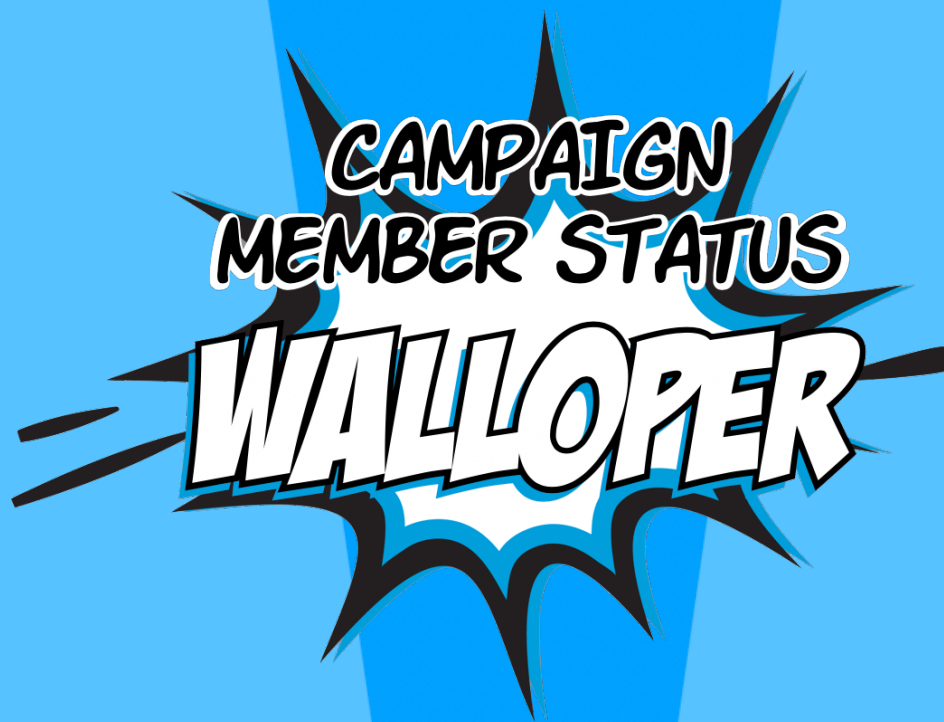




USER GUIDE



Campaign Member Status Walloper User Guide

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What is Campaign Member Status Walloper?

Campaign Member Status Walloper allows you to easily setup campaign member statuses that will be applied whenever campaigns are created or the record type or campaign type changes. You can add specific sets of statuses that can apply to particular record types and campaign types in any combination.

This guide gives step by step instructions for installation of the Campaign Member Status Walloper app from the Salesforce AppExchange into your Salesforce Org as well as instructions for how administrators and other Salesforce users can setup statuses for various combinations of campaign types and campaign record types.

Campaign Member Status Walloper is built and published by App Bang Wallop Ltd, a Salesforce ISV partner.

For support enquires please email walloper.support@appbangwallop.com.





How to install

1. Find Campaign Member Status Walloper on the AppExchange.

Search for “Campaign Member Status Walloper” on the AppExchange and choose “Get It Now”

The screenshot shows the AppExchange listing for the 'Campaign Member Status Walloper' app. The app is by 'App Bang Wallop' and is free. The main visual is a comic book-style graphic with speech bubbles. The text in the speech bubbles reads: 'I HATE SETTING MEMBER STATUSES EVERY TIME I CREATE A NEW CAMPAIGN!!!', 'YOU NEED CAMPAIGN MEMBER STATUS WALLOPER!!', 'CAMPAIGN MEMBER STATUS WALLOPER', 'SETUP DEFAULT CAMPAIGN MEMBER STATUSES ONCE AND FOR ALL!', and 'THEY'LL BE CREATED AUTOMATICALLY WHEN A CAMPAIGN IS CREATED !?!'. The app has a rating of 5 stars (0 reviews) and was listed on 10/28/2020. The description states: 'Easily setup campaign member statuses. Setup campaign member statuses that will be applied whenever campaigns are created or the record type or campaign type changes. Add specific sets of statuses that can apply to particular record types and campaign types in any combination.'

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ALL APPS

Campaign Member Status Walloper

By App Bang Wallop

Free

Get It Now

RATING ★★★★★ (0)

LISTED ON

LATEST RELEASE 10/28/2020

Easily setup campaign member statuses

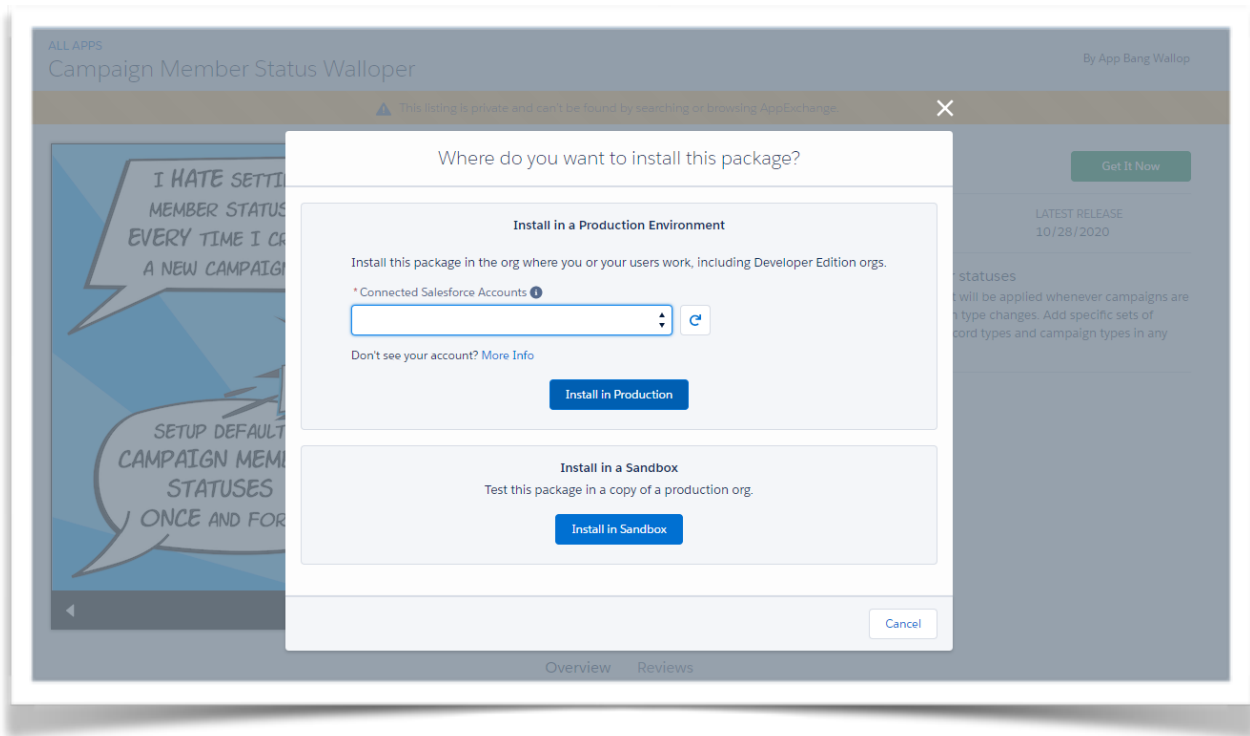
Setup campaign member statuses that will be applied whenever campaigns are created or the record type or campaign type changes. Add specific sets of statuses that can apply to particular record types and campaign types in any combination.

Overview Reviews





2. Choose where to install the Package - Production or Sandbox?





3. Confirm Installation Details and click “Confirm and Install”

Confirm Installation Details

Package	Version
Campaign Member Status Walloper (OneDotSix / 1.6.0)	OneDotSix / 1.6.0
Subscription	Organization
Free	
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username	

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	* Company
* Last Name	* Country
Job Title	State/Province
* Email	
Phone	

* ☐ I have read and agree to the [terms and conditions](#).

☐ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

CancelConfirm and Install





4. Choose which users to install the app for

Finalise the installation by choosing who to install the App for and click “Install”. We recommend choosing “Install for Admins Only” as that will allow only System Administrators access to the Campaign Member Status Walloper app. Campaign Member Status Walloper statuses will still be applied for other users.



Install Campaign Member Status Walloper

By App Bang Wallop



☒ Install for Admins Only



☐ Install for All Users



☐ Install for Specific Profiles...

InstallCancel

App Name	Publisher	Version Name	Version Number
Campaign Member Status Walloper	App Bang Wallop	OneDotFourteen	1.14

Description

Setup campaign member statuses that will be applied whenever campaigns are created or the record type or campaign type changes. Add specific sets of statuses that can apply to particular record types and campaign types in any combination.

Additional Details [View Components](#)

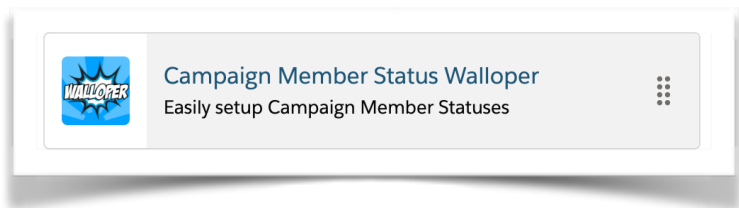
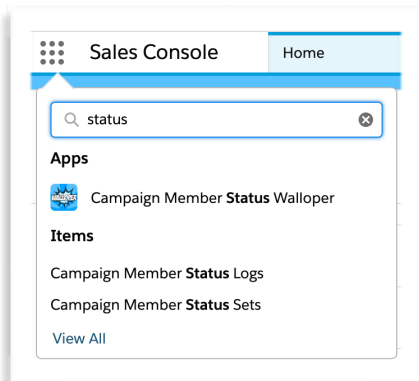




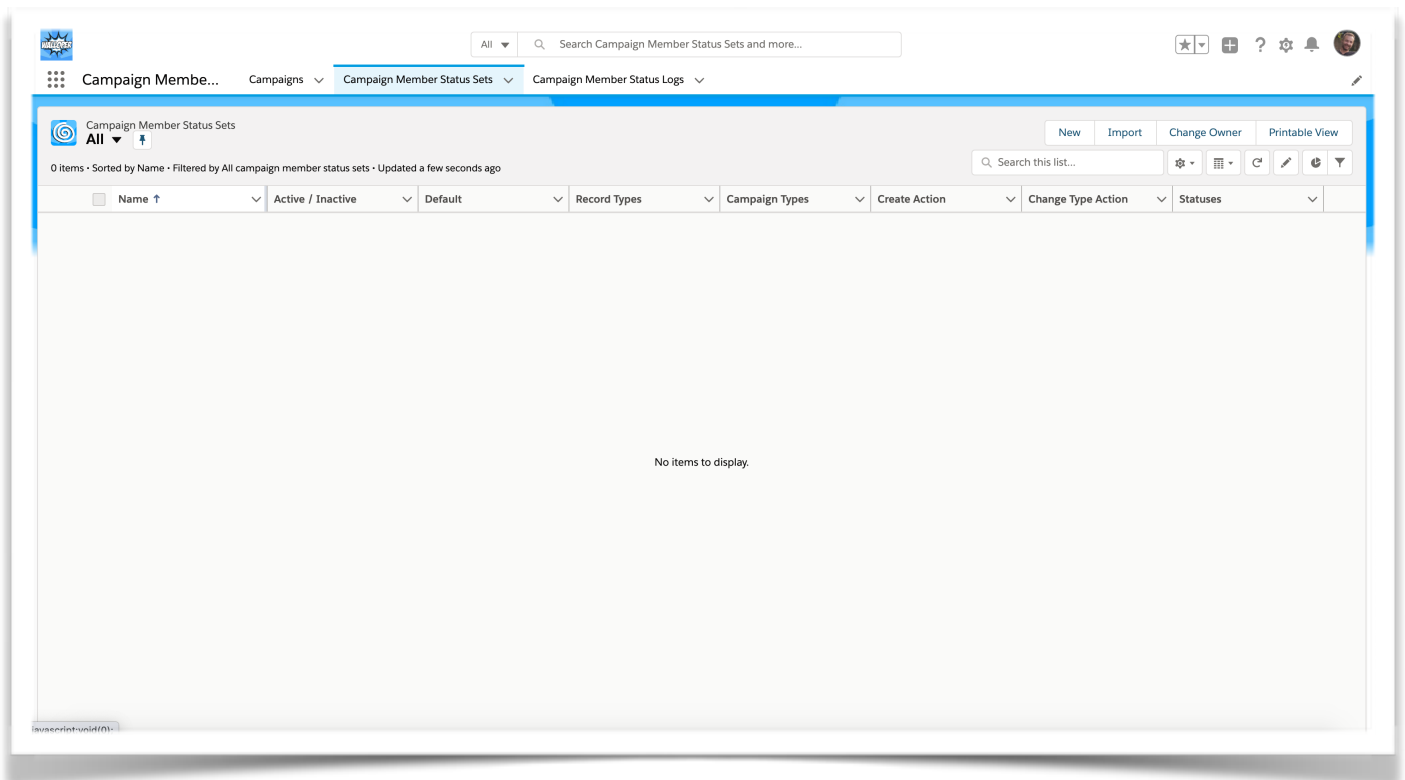
How to use

1. Getting started

You will need to choose the 'Campaign Member Status Walloper' app or add the 'Campaign Member Status Sets' tab to your current Salesforce app.



Then you can view the 'Campaign Member Status Sets' tab. The list will be empty the first time.



You're ready to setup statuses.





2. Create a status set

Click the 'New' button at the top of the 'Campaign Member Status Sets' list to popup the dialog to create a new status set.

- If you choose this as the default status set then it will be the fallback option for any campaign that doesn't match a non-default status set. Otherwise, choose record types and campaign types that this status set will be applied to.
- Note that the record type selection boxes will not appear if your Salesforce Org doesn't have campaign record types enabled or there is only 1 record type available to choose.
- The following options are available for 'Create Action':
 - **Replace all** - (recommended) when a campaign is created all existing statuses will be removed and only the ones defined in this status set will be added.
 - **Add to existing** - when a campaign is created the existing statuses will be left assigned to the campaign and the ones defined in this status set will be added.
- The following options are available for 'Change Type Action':
 - **Do nothing** - when a campaign changes to a record type and campaign type that matches this status set...
 - **Replace all** - when a campaign is created all existing statuses will be removed and only the ones defined in this status set will be added.
 - **Add to existing** - when a campaign is created the existing statuses will be left assigned to the campaign and the ones defined in this status set will be added.
- Click save to create an **inactive** status set that you can activate after adding all the statuses.
- Go to the 'Campaign Member Status Sets' tab to see the recently added status set.





3. Add statuses to a status set

Click on the status set to see the details.

Status Name	Default	Responded	SortOrder
Targetted	☒	☐	100

Click the 'New' button in the top right to add a status.

New Campaign Member Status

Information

* Status Name

* Campaign Member Status Set

Default ☐

Responded ☐

* SortOrder

- Give the status a name
- Choose if this status should be the default status for any campaign it is added to.
- Choose if the status should be a 'responded' status.
- Choose a SortOrder. The sort order must be different to all other statuses in the status set so that they can be displayed in the given order after being added to a campaign.
- Click 'Save', or 'Save & New' if you are adding another status immediately afterwards.





4. Activate a status set

Campaign Member Status Set: Default

Activate/Deactivate Edit Delete

Name: Default
Active / Inactive: **Inactive**

Default: ☒

Record Types

Campaign Types

Create Action: Replace all
Change Type Action: Do nothing
Statuses: 5
Created By: Kent Grugeon, 10/30/2020, 8:15 AM
Last Modified By: Kent Grugeon, 10/30/2020, 8:26 AM

Status Name	Default	Responded	SortOrder
Targetted	☒	☐	100
In progress	☐	☐	101
Qualified in	☐	☒	102
Qualified out	☐	☒	103
Cancelled	☐	☐	104

View All

Click the 'Activate/Deactivate' button in the top right corner.

Activate / Deactivate

The 'Default' set of statuses is currently

Inactive

[Click to activate](#)

'Click to activate' activates the status set.

Campaign Member Status Set: Default

Activate/Deactivate Edit Delete

Name: Default
Active / Inactive: **Active**

Default: ☒

Record Types

Campaign Types

Create Action: Replace all
Change Type Action: Do nothing
Statuses: 5
Created By:
Last Modified By:

Status Name	Default	Responded	SortOrder
Targetted	☒	☐	100
In progress	☐	☐	101
Qualified in	☐	☒	102
Qualified out	☐	☒	103
Cancelled	☐	☐	104

View All





5. View the log to see that things are working as expected

Choose the 'Campaign Member Status Logs' tab to see a record of when the Walloper has updated (or attempted to update) a campaign. The list will be empty until a campaign is created or the record type and/or campaign type of a campaign changes.

The screenshot shows the 'Campaign Member Status Logs' interface. At the top, there's a search bar and navigation tabs. The main content area displays a table with 3 items, sorted by Created Date. The table columns are: Log Number, Created Date, Campaign, Change Type, Status Set, Action, Status, and Details. The logs show updates for 'Test 10' with 'Replace all' actions, resulting in 'Success' status.

Log Number	Created Date	Campaign	Change Type	Status Set	Action	Status	Details
109	11/03/2020, 21:33	Test 10	Record or campaign type changed	Default	Replace all	Success	
102	11/03/2020, 20:59	Test 10	Record or campaign type changed	Webinars	Replace all	Success	
98	11/03/2020, 20:57	Test 10	Create	Default	Replace all	Success	

- **Log Number** - an auto-incrementing that is unique for each log entry.
- **Created Date** - date that the log entry was created
- **Campaign** - a link to the Campaign
- **Change Type** - describes if the campaign has been changed because of a creation or an update.
- **Status Set** - the set of statuses that was matched and therefore used to update the campaign's statuses.
- **Action** - action that was taken for the statuses of the campaign.
- **Status** - is the action was a success or failure.
- **Details** - if the status is not a success then details of the reason will be here so that the status set can be corrected.

Note that if you have installed Campaign Member Status Walloper for admins only or for a limited set of profiles then when other users create or update campaigns their attempts will not be logged. To see the Campaign Member Status Walloper logs for all campaign updates by all users you should assign the 'Campaign Member Status Logger' permission set to all users.





6. Permission Sets

There are 2 permission sets bundled within the Campaign Member Status Walloper that allow control of which users can manage default member statuses and which users will cause Campaign Member Status Logs to be written while updating campaigns.

- **Campaign Member Status Manager** - this permission set allows a user full access to all Campaign Member Status Walloper features, including creating status sets and statuses and activating and deactivating.
- **Campaign Member Status Logger** - this permission set allows a user access to read and write Campaign Member Status Walloper logs. Assign users to this permission set to verify that everything is working well for those users when creating campaigns and updating campaign types and record types.

Note that default campaign member statuses will be applied for all users even users who have not been assigned to either of these permission sets.





Support

For support or enquires please contact walloper.support@appbangwallop.com.

Thank you for choosing Campaign Member Status Walloper!

