

User Guide for Framework for Default Campaign Member Status

Setup Campaign Record Types

1. Go to Setup and select the Object Manager
2. Type **Campaign** in the Quick Find search box and click on Campaign
3. Select **Record Types** to view existing record types
4. Click **New** to create a new record type.

Configure Custom Metadata

1. Go to Setup and type **Custom Metadata Types** in the Quick Find search box.
2. Look for the **Campaign Default Status** custom metadata and click **Manage Records**
3. Click **New** to create a new record
4. Fill in the record details:
 - a. **Label:** standard field for custom metadata record. The values must be unique. A recommended format for this value is RecordTypeName Status# (ie. Trade Show Status1)
 - b. **Campaign Default Status Name:** auto populates
 - c. **Campaign Record Type Developer Name:** API name for the campaign record type
 - d. **Action:** picklist value that determining if the record is used to Add or Remove a Campaign Member Status
 - e. **Status:** the name of the status to be created or deleted
 - f. **Active:** checkbox field. Only the custom metadata with this field set to true will be picked up by the flow.
 - g. **Responded:** checkbox field used to set if the status should be counted as responded in the campaign. This option is ignored when Action is Remove.
 - h. **Default Campaign Status:** checkbox field to set the status as the default status for new campaign members. Only one custom metadata record should have this set to true. If the default should be Sent, then leave this field unchecked for the respective metadata records. This option is ignored when Action is Remove.

Create Campaign Records

1. Go to the Campaign object tab and click New to create a new campaign. Campaign Member Status records will be created and removed according to the custom metadata.

Campaign Default Status



Campaign Default Status Detail

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Label	TradeShow_Status1	Namespace Prefix	
Campaign Default Status Name	TradeShow_Status1	Protected Component	☐

▼ Campaign Member Status

Campaign Record Type Developer	Trade_Show	Active	☒
Name		Responded	☒
Action	Add	Default Campaign Status	☐
Status	Visited Booth		
Created By	Carlos Hip, 5/30/2022, 2:38 PM	Last Modified By	Carlos Hip, 5/30/2022, 2:38 PM

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Usage

Manage Custom Metadata

Create custom metadata records for Campaign Default Statuses (Campaign_Default_Status__mdt).

Create Campaign Records

Create campaign records and view the Campaign Member Status records.

Demo App in demo.org

Access the “Demo Campaign Status Framework” app