

Campaign Management

Campaign object is used to store information about a campaign organized usually for lead generation or brand building.

Lead generation campaign includes direct mail, email blasts, web seminars, conferences and trade shows whereas brand building campaigns include different types of advertisements.

Important Fields

1. Active:
It indicates whether the campaign is Active or not. If the campaign is not active then it cannot be related to other object's records.
2. Expected Revenue:
Amount of money expected to generate from the campaign.
3. Expected Response:
Percentage of responses expected to receive for the campaign.
4. Num Sent:
Number of individuals targeted by the campaign. For example, the number of emails sent.
5. Parent Campaign:
Allows multiple individual campaigns to be associated to a larger initiative.

Related Lists

Campaign Members

It is an object in itself which allows Leads/Contacts to be associated to multiple campaigns.

These Leads and Contacts are tracked using a status field having values sent (targeted to the campaign) or responded (responded to the campaign).

Campaign members helps to track the response rates of a campaign.

Campaign Influence

Opportunities are usually influenced by more than one campaign. Campaign influence allows to associate one opportunity to multiple campaigns.

However, an opportunity can have only one parent campaign and only the parent campaign influences campaign rollup summary fields on the related campaign.

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In short, campaign influence will allow you to display and report on an opportunity's relationship with multiple campaigns, but the opportunity is only attributed to a single campaign for rollup summary and ROI calculations.

To use campaign influence in your organization simply add "Campaign Influence" related list on Opportunity page layout.

Also to setup Automatic Campaign Influence navigate to Setup → Customize → Campaigns Influence → Campaign Influence Settings.

Note: While enabling Campaign Influence first add the related list to page layout and then enable Campaign Influence.

Limitations with Campaigns

- To create, edit or delete a Campaign the "Marketing User" needs to be checked on User record.
- Maximum number of leads/contacts that can be added from a view is 250 and from an import file is 50000.

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