Using Campaign and Event History

Purpose: Provide very basic instructions for volunteers to accurately update campaign history for incoming donations and record participation in events.

Overview

This set of instructions presumes familiarity with earlier tip sheets for manual membership data entry and donation entry.

For every donation associated with a campaign or event it is critical to also update each donor's Contact 'Campaign and Event History' detail section. Even though a Donation record has included a link to the campaign, the related Campaign record must be updated to indicate a donor response. This is critical to the accuracy of campaign reports and future follow up mailings.

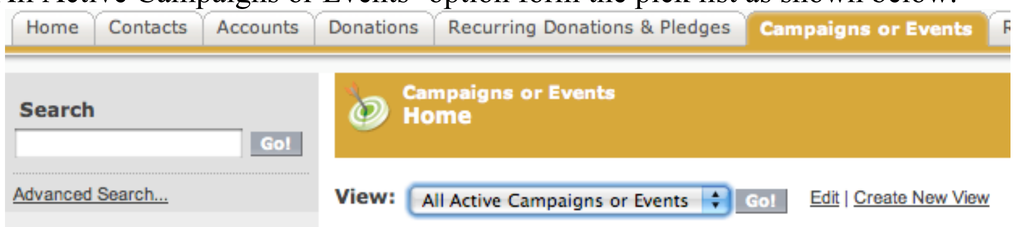
Some organizations have the practice of linking every Donation to a Campaign. Check to see if this is your organization's practice. You will want to be sure that the incoming donations are easily identified or otherwise coded to a campaign. There may be a default campaign for some gifts such as 'Memorial and Honorarium', 'Stewardship', 'Grants' or 'Miscellaneous'. Check with your Admin for your organization's practices.

For Events, indicating participation can improve communications for future similar events and involvement with your organization. Events can be fundraising events or other activities such as outings or your annual meeting. Events can also be volunteer work events. If you are using the 'Land Tracker' application, particularly if you are a land trust, record your volunteer stewardship events as 'Property Projects' instead, so that they will also be linked to the appropriate property.

"Campaigns' are usually set up by your organization's Salesforce administrator. Most data entry volunteers will be recording information for campaigns and events that have already been set up in Salesforce. Check with your volunteer advisor to be certain the level of entry that is expected for your role within your organization.

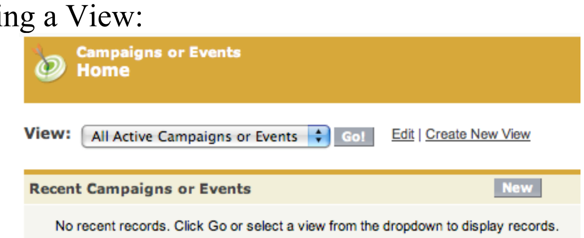
Setting up a Campaign or Event – For Admin

1. The **Campaigns or Event Tab** is color-coded a dark gold, a deeper shade than used for Donations.
2. Select the ‘All Active Campaigns or Events’ option form the pick list as shown below.

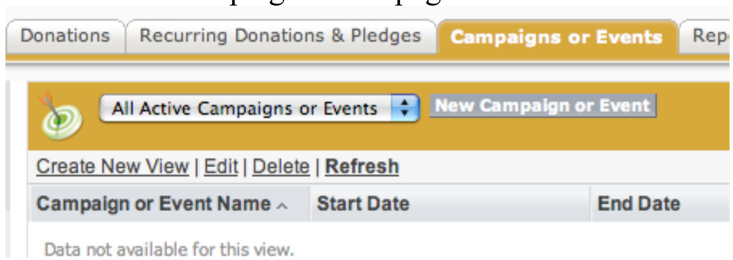


3. Click ‘Go!’
4. Here is an example of a list of active campaigns:

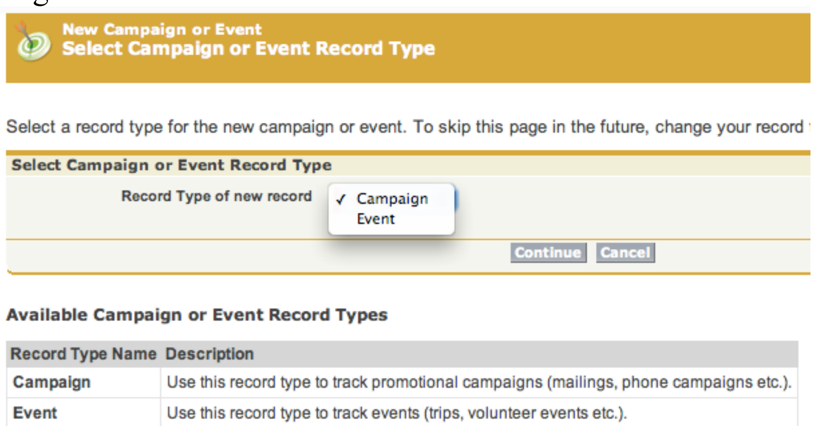
5. **Naming** - Each campaign or event should have a unique name, however it is helpful for reporting purposes to have similar names for campaigns and events you wish to compare. It is possible to edit the names afterwards to assist in comparisons, but you do not want to overwrite or combine participation by repeating a name. Check to be sure that the campaign or event does not already exist. Note this list will only show your active campaigns as indicated by the Active checkbox in the Campaign detail field. It is recommended to create at least two views, one for all active campaigns and one for closed campaigns.
6. For a new organization, set up your first campaign, by clicking on the ‘New Campaign or Event’ button after running a View:



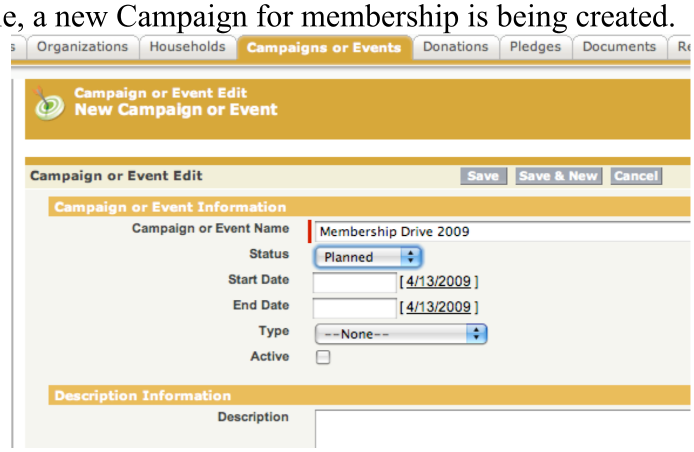
7. Or the ‘New’ button on the Campaign Home page:



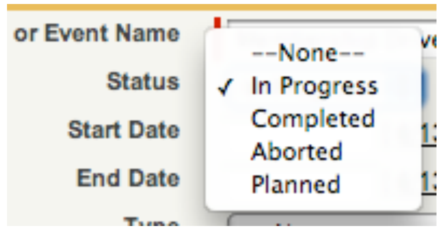
8. Either will take you to the new Campaign or Event Record screen. Select Campaign or Event. Whatever option you select, the options on the following screens will afterwards be the same, however, you can run reports and views separately on Events or on Campaigns which can prove useful for most organizations.



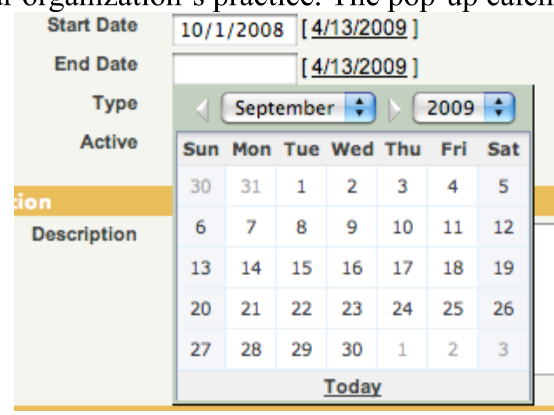
9. In this example, a new Campaign for membership is being created.



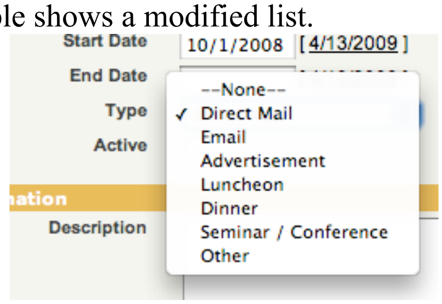
10. Next select the **Campaign Status** from the next pick list. Note that these options operate independently of the Active status checkbox shown a few lines below. ‘In Progress’ is shown selected here. Your organization can choose to enter old campaigns or events into the database as long as the ‘Active’ box is selected, the old information can be entered and Contacts linked to the Campaign. The status field is one sorting option used in creating reports on Campaigns. Some organizations may choose to leave this field blank and base their reporting on other fields. It is relatively simple to edit this field later.



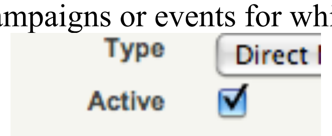
11. 'Start Date' and 'End Date': these fields are of importance in creating your campaign reports. You want to be sure that all dates for donations related to the campaigns have been captured between these two dates. You also have the option of leaving these fields blank or just the end date blank for an ongoing campaign. It is also relatively simple to edit this field later. For example, an annual membership campaign might include members who have sent in their membership renewals early, even before the mailing. Some organizations may count renewals in the last quarter of the year towards the following year and set their dates from 10/1/2008 to 9/30/2009 to reflect this practice. Also, you may want to create a separate campaign for "New Members 2009" as an additional way to track newly recruited members. Choose the dates and campaigns to reflect your organization's practice. The pop-up calendars can be handy.



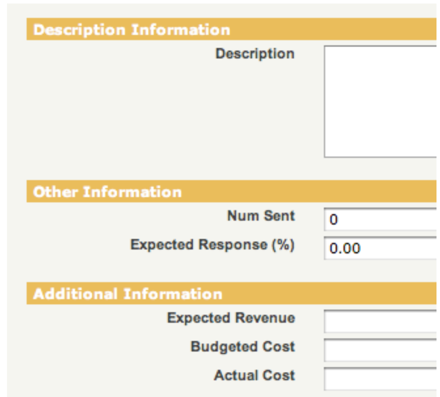
12. Select the **'Type' of Campaign** from the pick list- in this case, 'Direct Mail'. (Note that the Admin for your organization may add, delete and reorder your organization's Campaign Types for this pick list.) This example shows a modified list.



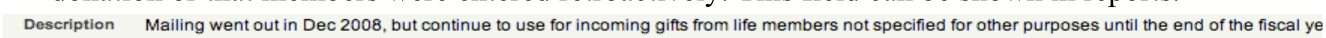
13. Check the **'Active'** box for any campaigns or events for which you will be editing members.



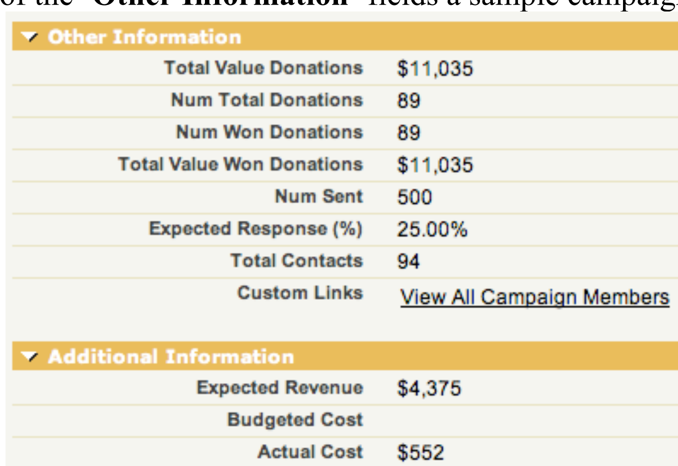
14. The lower half of the screen includes additional optional information that can be left blank or entered at any point in the campaign. Financial information and response predictions are items that can be useful for your reports and performance dashboards.



15. The **'Description'** field is useful for indicating key campaign details for future reference or instruction to others entering donations. In the example below, the note is a reminder that although the donations began arriving in November, the actual mailing went out in December. It is also a reminder that if someone who is a Life Member makes a donation it should be added to this campaign. A description could include more cost breakouts, the dedicated purpose of the donation or that members were entered retroactively. This field can be shown in reports.



16. Here is an example of the **'Other Information'** fields a sample campaign.



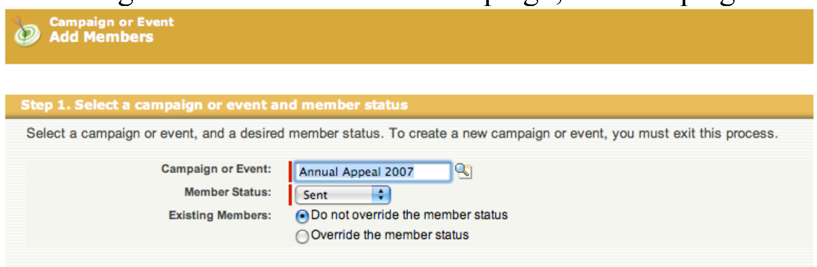
17. Note that the **'Num Total Donations'** equals the **'Num Won Donations'** donations therefore, no donations or pledges are currently outstanding. Note that the **'Total Value of Donations'** also equals the **'Total Value of Won Donations'**.

18. **'Total Contacts'** are greater than the number of donations. This occurs when there is more than one Contact per Household linked to a donation or when more than one Contact is assigned to a role for one donation such as when someone is given a 'Soft Credit' for a donation made by another individual. Although all the related Contacts will be shown in the Campaign View, the donation is counted only once in the financial totals.

19. **'Expected Response'** is an estimate; past campaigns can be used as predictors for this comparative figure that can be incorporated into reports or dashboards.

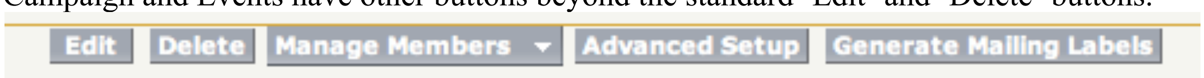
20. **'View All Campaign Members'** is a standard Salesforce report known as the 'Campaign or Event Call Down Report'. This report can be used, as the basis for a customized report, but be sure to give customized reports a new name. Like other reports in Salesforce, individual columns can be sorted. This can be useful in searching and editing Campaign Members within the same household with the same last name (sort on last name) or different names (sort on street address).

21. It is possible to add these campaign members to a new campaign or to change their membership status. If you are adding the members to a new campaign, that campaign must be set up first.

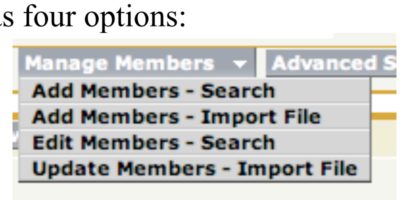


22. Reports based on the rollup report can have many uses: to create mail merge files for thank you letters, to change the status of recent donors for a new campaign so they won't get solicitations too close together and to further analyze the campaign performance.

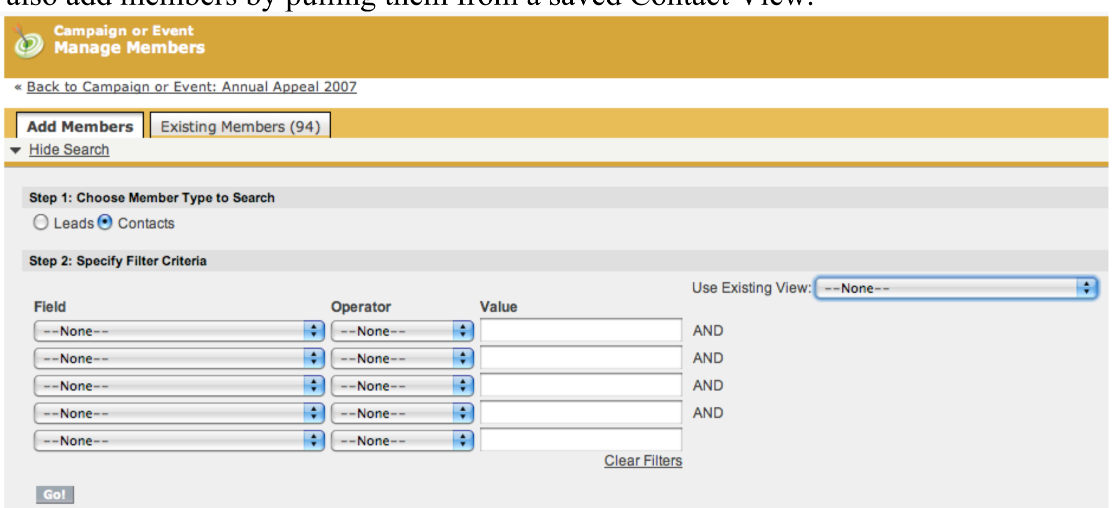
23. Campaign and Events have other buttons beyond the standard 'Edit' and 'Delete' buttons.



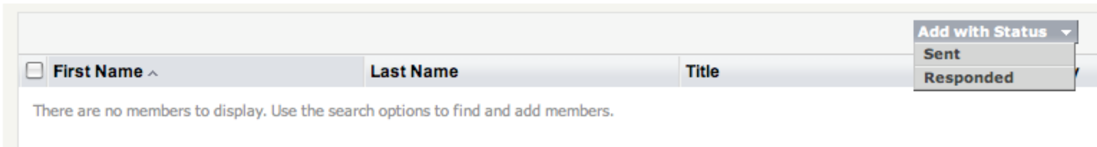
24. 'Manage Members' button has four options:



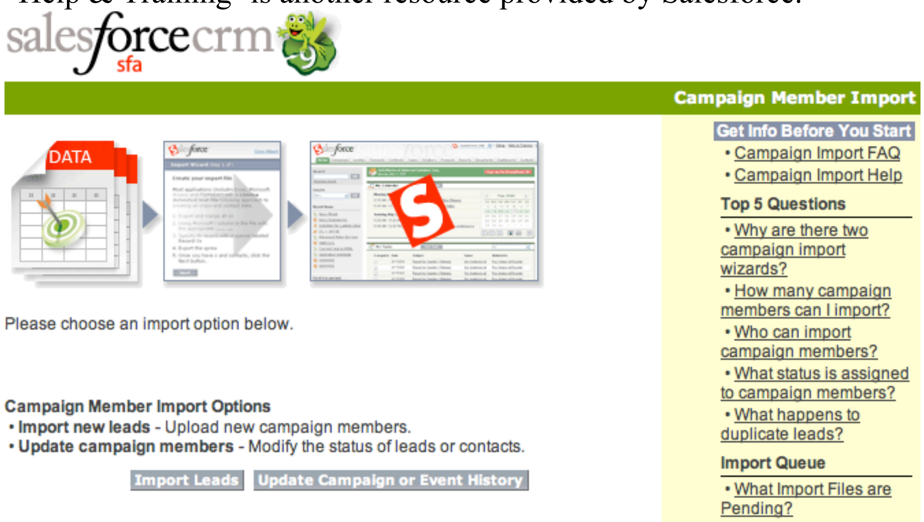
25. 'Add Members – Search' allows you to search among either Leads (not activated in the RILWP template) or Contacts, to filter them by Contact or Organization or Campaign/Event fields. You can also add members by pulling them from a saved Contact View.



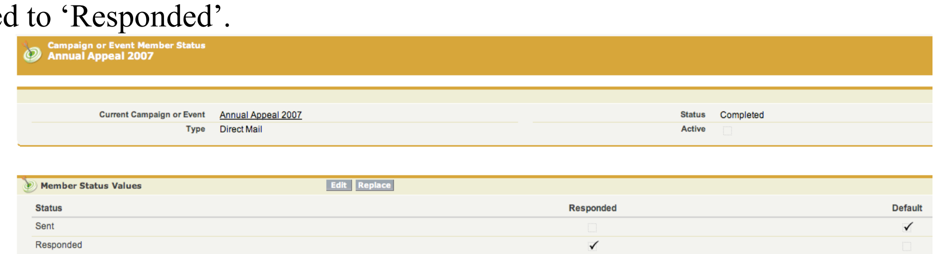
26. You can also use this screen to set the Campaign/Event Status field to either 'Sent' or 'Responded'.



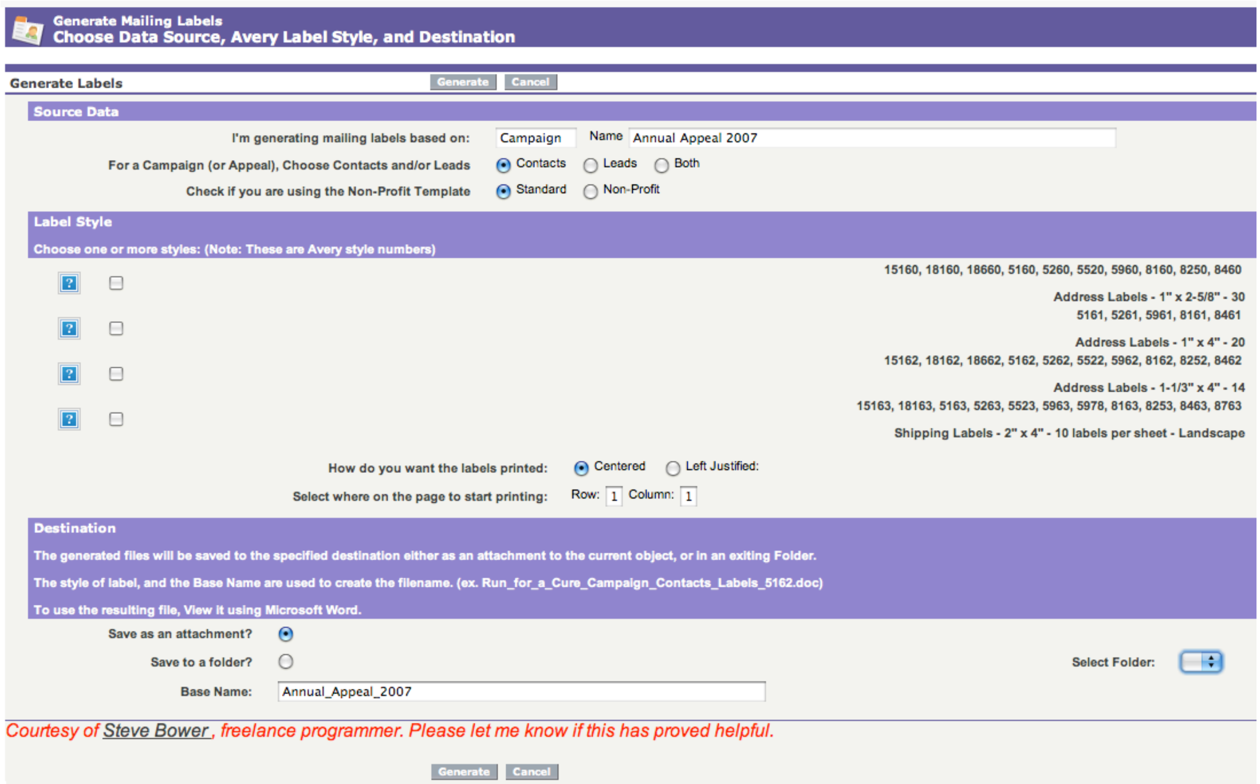
27. **'Add Members – Import File' or 'Update Members – Import File"** will allow you to import Leads or Contacts for your Campaign/ Event from outside Salesforce using the 'Import Wizard'. There are complete details in the Campaign Import tips provided by Salesforce that you should study before utilizing this function. A free online training module 'Advanced Importing' located within the 'Help & Training' is another resource provided by Salesforce.



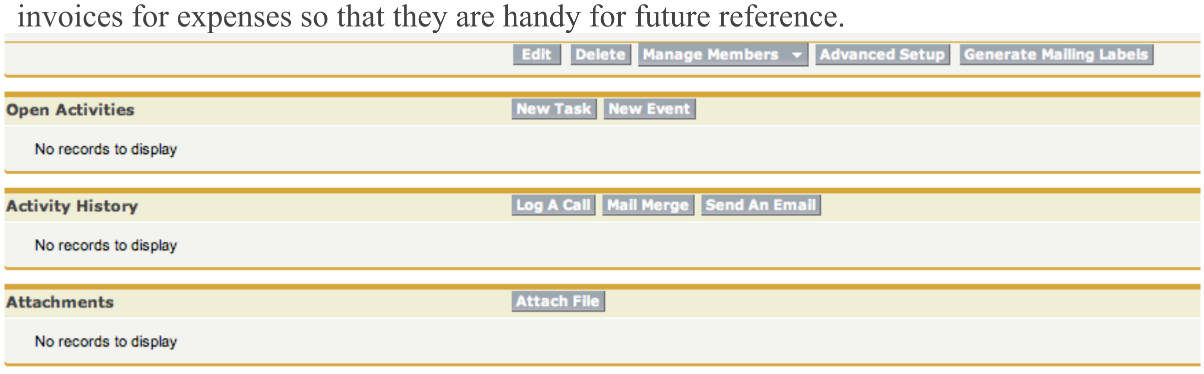
28. **'Edit Members – Search'** provides options to sort existing Campaign Members using Contact and Organization fields and to use check boxes to edit their Campaign Status.
29. **'Advanced Status'** can be used to set the default status of members added to a campaign. For instance, in this example all members were added with a default status of 'Sent' that could then be changed to 'Responded'.



30. **'Generate Mailing Labels'** is a free app (note the shift to purple) that has been added to the RILWP template to allow for printing standard mailing labels for campaign members.

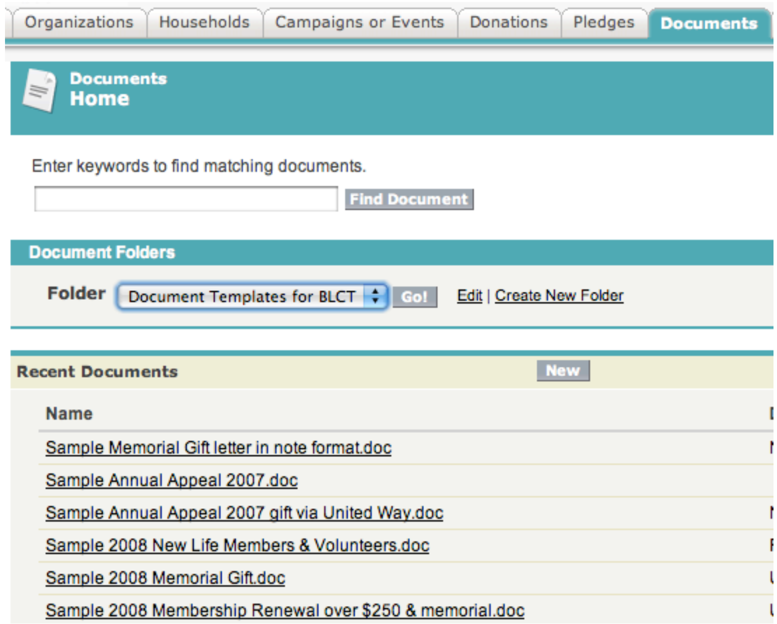


31. Other sections within the Campaign/Event Detail screen allow you to create related tasks and follow up events which can be assigned to yourself or other licensed users. Events can be shown on the organization or a personal calendar. Items related to you will appear on your Home page. You can log a call or send an email related to the campaign or event. If you use Internet Explorer for Windows 6.0 or higher on Microsoft Windows 2000 or Windows XP as your browser, you can use the '**Mail Merge**' button to link documents created for this purpose. **'Attach file'** could be used to attach files containing materials for the campaign or event such as flyers, letter templates or even invoices for expenses so that they are handy for future reference.

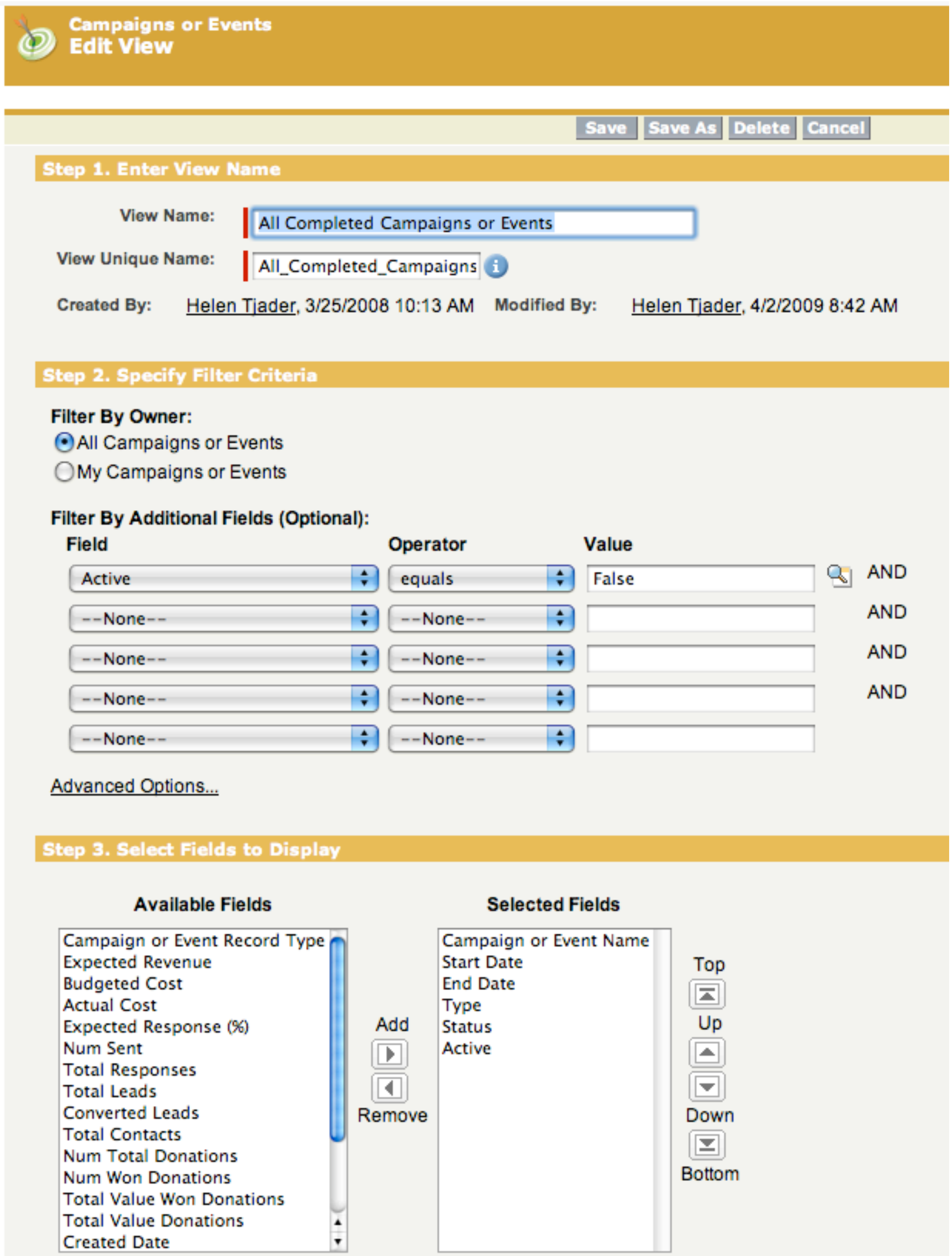


32. Note that sample documents and other templates for the organization can also be filed under the **'Documents' tab. It is a good practice to keep specific examples with the related campaign or event for permanent reference and the copies of the templates that you will modify for future**

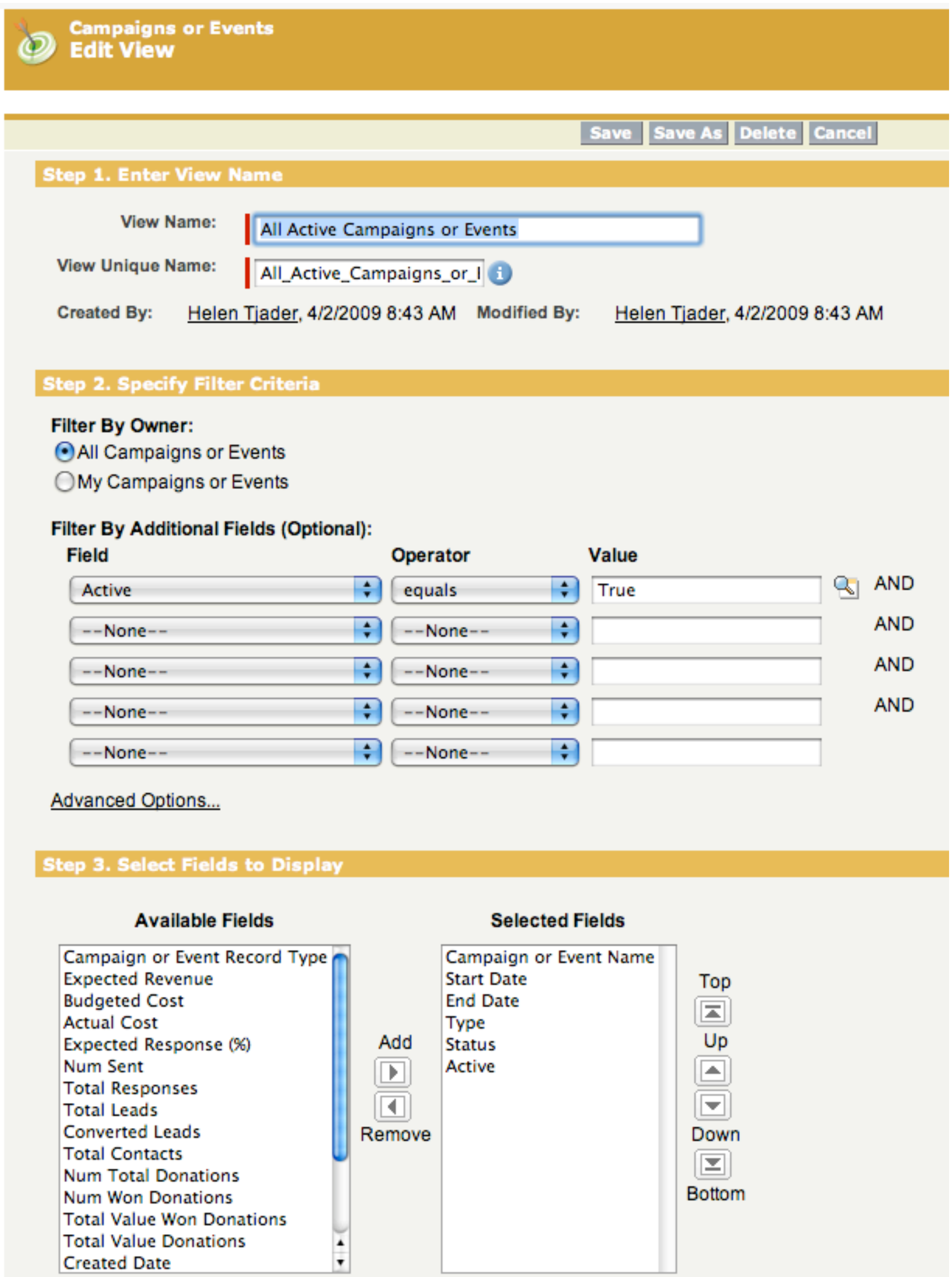
campaigns under the Documents tab. Utilization of the Documents area is an excellent way to insure that others in your organization have access to templates, particularly in all volunteer organizations where these items might be stranded or vulnerable on one individual's personal computer.



33. **Creating a 'Campaign or Event View'** is the best method for proofing that the campaigns and events are accurately posted and ready to be viewed by others in your organization who might be entering donations and updating campaign history and participation. Below are two examples of Views created for this purpose: One for Completed and one for Active Campaigns. Every organization should probably start with these two basic views visible to everyone for all campaigns and events. For larger organizations, it may become useful for Campaigns or Events to be managed by separate individuals in hierarchy involving tiers of management. Salesforce allows for this segregation and supervision if needed.


Campaigns or Events
Edit View
Save
Save As
Delete
Cancel
Step 1. Enter View Name
View Name:
All Completed Campaigns or Events
View Unique Name:
All_Completed_Campaigns
Created By:
Helen Tjader, 3/25/2008 10:13 AM
Modified By:
Helen Tjader, 4/2/2009 8:42 AM
Step 2. Specify Filter Criteria
Filter By Owner:
All Campaigns or Events
My Campaigns or Events
Filter By Additional Fields (Optional):
Field
Operator
Value
Active
equals
False
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Advanced Options...
Step 3. Select Fields to Display
Available Fields
Campaign or Event Record Type
Expected Revenue
Budgeted Cost
Actual Cost
Expected Response (%)
Num Sent
Total Responses
Total Leads
Converted Leads
Total Contacts
Num Total Donations
Num Won Donations
Total Value Won Donations
Total Value Donations
Created Date
Add
Remove
Selected Fields
Campaign or Event Name
Start Date
End Date
Type
Status
Active
Top
Up
Down
Bottom

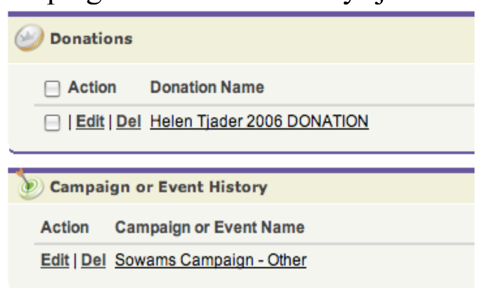
34.


Campaigns or Events
Edit View
Save
Save As
Delete
Cancel
Step 1. Enter View Name
View Name:
All Active Campaigns or Events
View Unique Name:
All_Active_Campaigns_or_I
Created By:
Helen Tjader, 4/2/2009 8:43 AM
Modified By:
Helen Tjader, 4/2/2009 8:43 AM
Step 2. Specify Filter Criteria
Filter By Owner:
All Campaigns or Events
My Campaigns or Events
Filter By Additional Fields (Optional):
Field
Operator
Value
Active
equals
True
AND
--None--
--None--
AND
AND
AND
Advanced Options...
Step 3. Select Fields to Display
Available Fields
Campaign or Event Record Type
Expected Revenue
Budgeted Cost
Actual Cost
Expected Response (%)
Num Sent
Total Responses
Total Leads
Converted Leads
Total Contacts
Num Total Donations
Num Won Donations
Total Value Won Donations
Total Value Donations
Created Date
Add
Remove
Selected Fields
Campaign or Event Name
Start Date
End Date
Type
Status
Active
Top
Up
Down
Bottom

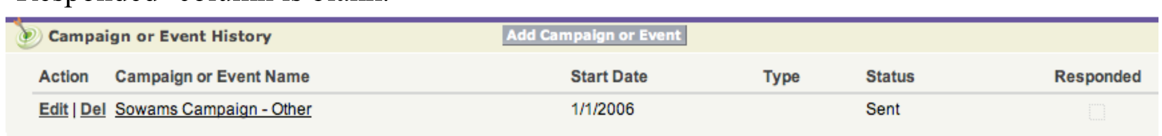
35.

Recording a Donation Linked to a Campaign

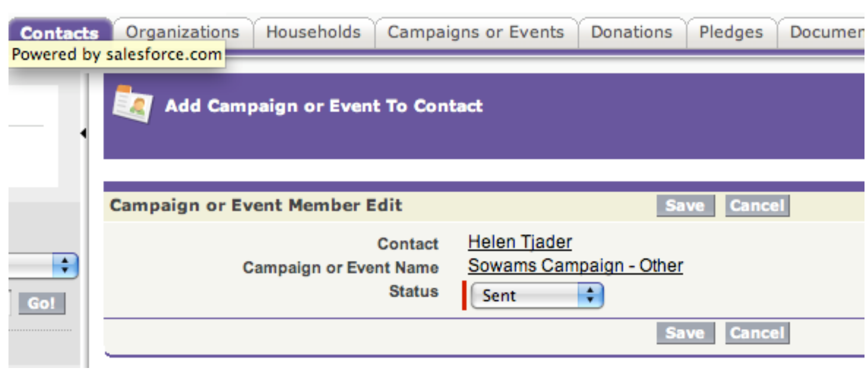
1. Follow the 'First Steps' included in the Donation Entry tipsheet before beginning with these instructions.
2. Once the Donation entry has been saved and any changes made to the Donation Detail record have been saved, click on the donor's Contact Name shown under Contact Roles (repeat these steps as needed for Donations with several Contacts) to return you to the Contact record.
3. Scroll down to the bar for 'Campaign and Event History' just below the 'Donations' bar.



4. In this example, one Campaign is shown in the record for this Contact. Most likely a mailing for this campaign was sent to this donor. Currently, the Campaign Status is 'Sent' and the 'Responded' column is blank.



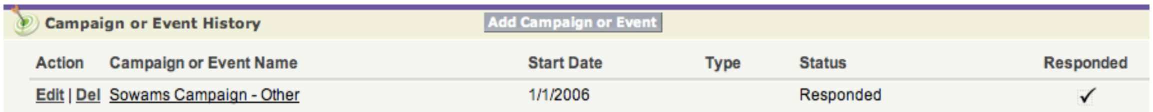
5. To update the record to show that a donation as been received for this campaign click the Edit option before the Campaign Name.



6. This very simple screen gives a two option pick list:

Scroll down Responded and click either 'Save' button.

7. You are then returned to the Contact detail screen and the Status has been updated to Responded and the Responded column displays a check mark.



Campaign or Event History   Add Campaign or Event

Action	Campaign or Event Name	Start Date	Type	Status	Responded
Edit | Del	Sowams Campaign - Other	1/1/2006		Responded	✓

8. You are done!

Recording Participation in an Event

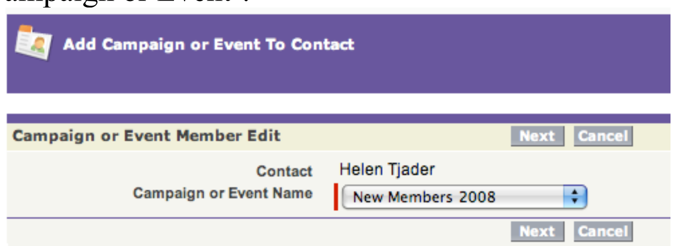
1. When your Salesforce administrator has set up an Event, steps for recording participation are nearly identical to those for recording Campaign participation. For example, you may be entering information from an attendance list for a fundraising event. When the invitations were mailed out, the Event was added to the Contact's Campaign or Event History as 'Sent'.
2. When no donation is involved, simply start from within the Contact record at step 5 above.
3. If you are working from an Event attendance list, it is possible that:
   a. Some attendees were not on the mailing list – If this is the case you can manually add them to the Event by following the instructions below.
   b. Some attendees are not included among your organization's contacts – in this case, you will need to consult your volunteer advisor and, if requested, first add these attendees to Contacts using the tipsheet for Manual Membership data entry and then follow the instructions below to add each new Contact to the Event.

Adding a Contact to a Campaign or Event

1. If the donation was for a Campaign not shown on the Contact detail screen, check with your volunteer advisor to see if you should add this Contact to a campaign and indicate that they have responded. If so, you can individually add a Contact to a Campaign

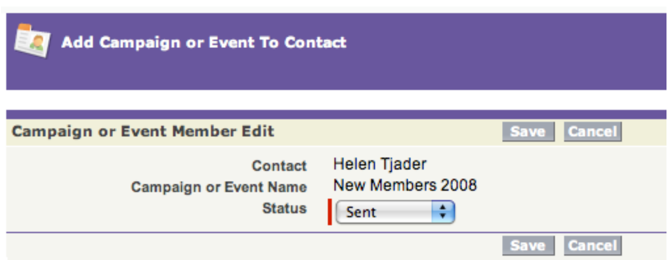
   a. Example – Your organization hands out brochures (not otherwise coded) at local events in order to recruit new members. Your organization doesn't know, until a donation arrives, who is responding to this campaign, but your Salesforce administrator has set up a campaign to record this activity. So campaign participation is recorded at the time of donation.

   b. Within the Contact record detail, at the Campaign or Event History bar, click on the button to 'Add Campaign or Event'.



   c. Choose the appropriate Campaign or Event from the pick list of open ones set up by your Salesforce administrator. In this case, New Members 2008 is shown. Click the 'Next' button.

   d. On the next screen shown below, change the status from 'Sent' to 'Responded' and click the 'Save' button.



   e. You will be returned to the Contact's record screen. Under Campaign and Event History, the new campaign and the Responded' status have been updated. You are done.