Salesforce Campaigns: Reporting and Influence Basics for Teams

CHEATSHEET

Stop losing marketing attribution. Learn how to configure Campaign Members, hierarchies, and response statuses.

Marketing drives pipeline, but Salesforce shows $0 in influenced revenue. The culprit? Broken Campaign Member structures. Here is the blueprint to fix it.

1 What is a Campaign Record?

Think of a Salesforce Campaign as a folder containing everything related to a specific marketing initiative.

- Campaign Fields: Track Name, Type, Status, Budgeted Cost, and Actual Cost out-of-the-box
- Hierarchy: Build parent-child relationships (e.g., regional events rolling up to a yearly event)
- Automatic Stats: Native rolling up of Leads, Contacts, Opportunities, and total revenue won

2 The Campaign Member Junction

Campaigns can't attribute revenue without people. Campaign Members act as the junction record connecting Leads and Contacts to your Campaign.

- Junction Linkage: Bridges Lead or Contact records directly to a specific Campaign
- Bulk Load Options: Add members directly from List Views, Reports, Data Import Wizard, or Flows
- Marketing Sync: Account Engagement (Pardot) syncs member responses automatically
- Targeting History: View every touchpoint across the entire customer journey in one place

3 Master Member Statuses

Raw membership isn't enough; you must track active engagement. Custom statuses tell the story of customer interactions.

- Custom Statuses: Match the specific initiative (e.g., 'Registered', 'Attended' for Webinars)
- The 'Responded' Flag: Crucial checkbox that tells Salesforce the contact actually engaged
- Standardization: Align statuses uniformly across Campaigns of the same Type for clear reports
- Automation Rules: Trigger member status updates via Salesforce Flow when forms are completed