

# NPSP: Create and Update Campaign Members Through an Opportunity

This article contains these sections:

- Campaign Members and Opportunities Overview
- Create Campaign Members Through an Opportunity
- Update Campaign Member Status Through an Opportunity
- Opportunity Stages, Campaign Member Statuses, and Actions on the Campaign

**NOTE:** This article assumes you are at least familiar with how Campaigns work in Salesforce. For more information, see the *Campaigns documentation* ([https://help.salesforce.com/HTViewHelpDoc?id=campaigns\\_def.htm&language=en\\_US](https://help.salesforce.com/HTViewHelpDoc?id=campaigns_def.htm&language=en_US)) in *Salesforce Help & Training*.

## Campaign Members and Opportunities Overview

Let's say you want to make an appeal to a bunch of Campaign contacts. Your organization makes the appeal and the donations come in. Wouldn't it be nice to be able to enter those Opportunity donations in Salesforce and have the contacts' Campaign Member Statuses updated automatically, on the Campaign? The Nonprofit Success Pack does that for you, and much more, with actions triggered by the Opportunity Stage, Primary Contact, Primary Campaign Source, and Primary Contact Campaign Member Status fields on the Opportunity object. Great!

Campaigns are related to Opportunities through the Primary Campaign Source field on the Opportunity:

**Opportunity Detail** Edit Delete Clone Matching Donation Refresh Name Email Acknowledgment

▼ Donation Information

Opportunity Name	Mary Jones \$40 Donation 05/04/2015	Private
Account Name	Mary Jones Household	Primary Campaign Source Fundraising 2015
Primary Contact	Mary Jones	Primary Contact Campaign Member Status Responded
Amount	\$40.00	Recurring Donation

The Opportunity's Primary Contact Campaign Member Status text field lets you specify the Member Status for that Contact on that Campaign. Here's what it looks like on the Campaign's Campaign Members related list:

Campaign Members						
Manage Members						
Action	Type	Status	First Name	Last Name	Title	Company
<a href="#">Edit</a>   <a href="#">Remove</a>	Contact	Responded	Mary	Jones		Mary Jones Household

# Create Campaign Members Through an Opportunity

When you specify a Contact as the Opportunity's Primary Contact, the Nonprofit Success Pack automatically adds that Contact as a Member to the Opportunity's related Campaign, if the member doesn't already exist.

- 1. Enter your new Opportunity donation, and specify a Primary Contact.
- 2. Specify the Campaign to which you want to add this contact.
- 3. (Optional) Set the Primary Contact Campaign Member Status if you want to set their status in the Campaign as well. See below for more details.

# Update Campaign Member Status Through an Opportunity

You can automatically update Campaign Member Status, right from the Opportunity object as well.

- 1. Enter your new Opportunity donation, and specify a Primary Contact.
- 2. Specify the Campaign to which you want to relate this Opportunity.
- 3. Set the Primary Contact Campaign Member Status. See below for more details.

# Opportunity Stages, Campaign Member Statuses, and Actions on the Campaign

The Opportunity's Stage and the value in the Opportunity's Primary Contact Campaign Member Status field determine the behavior of the Campaign Member record. If the Contact is not already a Member of the Campaign, Salesforce creates a new Campaign Member record. Otherwise, Salesforce updates the existing Campaign Member record for the Contact.

Closing an open Opportunity with a blank Primary Contact Campaign Member Status field will also update the member's status. For example, if the Opportunity Stage is an Open value and the Primary Contact Campaign Member Status field is blank, then Salesforce will assign the first non-Responded value to the Campaign Member. If you later update the Opportunity to a Closed/Won stage, then Salesforce will automatically update the Campaign Member to the first Responded value.

The following table shows Campaign Member actions as they relate to Opportunity stage types and Primary Contact Campaign Member Status values:

Opportunity Stage Type	Opportunity Primary Contact Campaign Member Status Value	Campaign Member Action
Closed/Won	blank	Contact's Campaign Member Status updated with Campaign's first Responded value.

Opportunity Stage Type	Opportunity Primary Contact Campaign Member Status Value	Campaign Member Action
Open	blank	Contact's Campaign Member Status updated with Campaign's first non-Responded value.
Any	omit	Contact's current Campaign Member Status is left unchanged. If the Contact is not already a Member of the Campaign, no Campaign Member record is created.
Any	Any text value	<p>If the Campaign Member Status does not already exist, Salesforce creates it. Contact's Member Status is updated to this value.</p> <p><b>NOTE:</b> <i>You can edit the Campaign Member Status to a Responded value by going to the Campaign record, clicking the Advanced Setup button, and editing the status to check Responded. The Campaign Member records will update to match.</i></p>



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