Use Case: Campaign Members

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You can link a Campaign Member to a Lead or a Contact. In this example, we'll be using a Contact.

If the Contact already has a Campaign Member to update, you can update it. If not, you can create a Campaign Member and establish a relationship to the Contact.

You can see a similar use case in our blog:

How Collabrax Uses FormAssembly to Build Campaign Member Lists in Salesforce

Update a Contact

We'll begin with the Contact Lookup and Update.

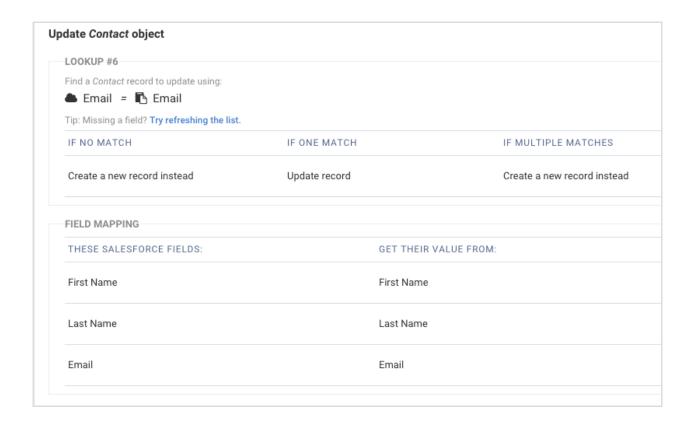
In Step 1 of the connector, to find a specific contact record, the lookup uses either:

- the Contact ID which was passed through the URL, like in an email, or
- the email entered into the form by the respondent.

If a match is not found, a new Contact will be created.

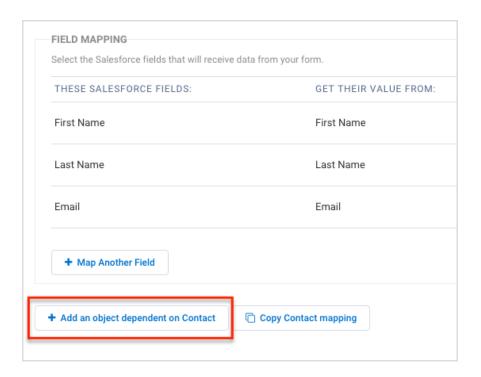
If a match is found, it will update the record with the mapped fields.

If multiple matching records are found, in this example, we will update the most recently modified record.



Update a Campaign Member

First, click to add a dependent object onto the Contact Update. Place your cursor over any part of Step 1 to see this option appear.

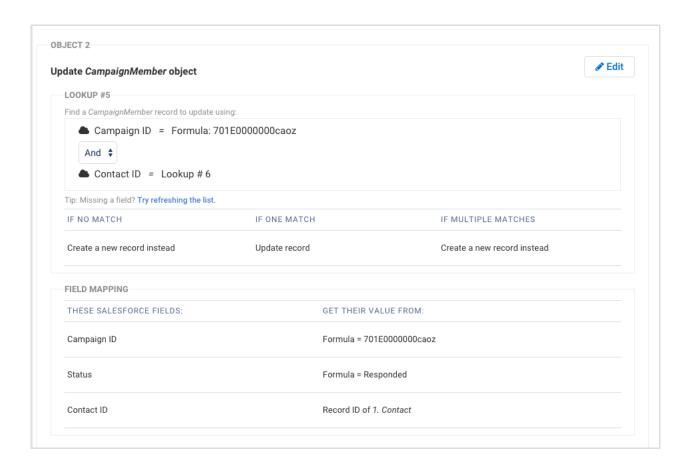


To lookup a Campaign Member, use the Campaign ID and the Contact ID. Since we just did a lookup to find the Contact ID, you'll reference it in the subsequent lookup. You'll need to grab your Campaign ID out of Salesforce.

If a match is not found, a new Campaign Member record will be created.

If a match is found, it will update with the mapped fields.

If multiple matches are found, the connector will create a new Campaign Member, in this example. You can choose another option, depending on what works best for your process.



If you want to create a new Campaign Member record, the Campaign ID and Contact ID must be mapped.