

Use Case: Campaign Members

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About

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 Contact object

LOOKUP #6

Find a Contact record to update using:
📧 Email = 📧 Email
Tip: Missing a field? [Try refreshing the list.](#)

IF NO MATCH	IF ONE MATCH	IF MULTIPLE MATCHES
Create a new record instead	Update record	Create a new record instead

FIELD MAPPING

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
First Name	First Name
Last Name	Last Name
Email	Email

Update a Campaign Member

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

FIELD MAPPING

Select the Salesforce fields that will receive data from your form.

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
First Name	First Name
Last Name	Last Name
Email	Email

+ Map Another Field

+ Add an object dependent on Contact

📋 Copy Contact mapping

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.

OBJECT 2

Update CampaignMember object

Edit

LOOKUP #5

Find a CampaignMember record to update using:

Campaign ID = Formula: 701E0000000caoz

And

Contact ID = Lookup # 6

Tip: Missing a field? [Try refreshing the list.](#)

IF NO MATCH	IF ONE MATCH	IF MULTIPLE MATCHES
Create a new record instead	Update record	Create a new record instead

FIELD MAPPING

THESE SALESFORCE FIELDS:	GET THEIR VALUE FROM:
Campaign ID	Formula = 701E0000000caoz
Status	Formula = Responded
Contact ID	Record ID of 1. Contact

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