Campaign Influence

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CAMPAIGN INFLUENCE

Understand how your campaigns are affecting your opportunity pipeline.

Customizable Campaign Influence and the legacy Campaign Influence 1.0 are available to Lightning Experience customers. Campaign Influence 1.0 is supported only in Salesforce Classic. We recommend using Customizable Campaign Influence, which offers more flexibility and control.

To use Campaign Influence 1.0, an admin must disable Customizable Campaign Influence in Setup. However, if you revert to version 1.0, your existing campaign influence records are deleted, which can impact workflows and Apex rules.

Customizable Campaign Influence

Campaign Influence is a tool that helps you attribute a percentage of success to influential campaigns. Two versions are available: Campaign Influence 1.0 for Salesforce Classic and Customizable Campaign Influence for Classic and Lightning Experience. The customizable version offers more flexibility in how you assign influence to your marketing activities.

Campaign Influence 1.0

Campaign Influence 1.0 helps identify the return on your campaign investments. It uses the Campaign Influence object to make connections across contacts, campaigns, and opportunities. Campaign Influence 1.0 isn't supported in Lightning Experience. To track influential campaigns in Lightning Experience, switch to Customizable Campaign Influence.

EDITIONS

Campaign Influence 1.0

Available in: Salesforce Classic (not available in all orgs)

Available in: Salesforce **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Customizable Campaign Influence (v2)

Available in: Lightning Experience

Available in: Salesforce **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Customizable Campaign Influence

Campaign Influence is a tool that helps you attribute a percentage of success to influential campaigns. Two versions are available: Campaign Influence 1.0 for Salesforce Classic and Customizable Campaign Influence for Classic and Lightning Experience. The customizable version offers more flexibility in how you assign influence to your marketing activities.

Download the PDF Implementation Guide: Campaign Influence Implementation Guide

How Customizable Campaign Influence Works

Customizable Campaign Influence identifies revenue share with standard and custom attribution models that you can update manually or via automated processes. Add Customizable Campaign Influence data in related lists and reports so that your reps can understand which campaigns impact their opportunity pipeline.

Switching to Customizable Campaign Influence

Look at the differences between the two Campaign Influence features and consider what steps are necessary to prepare for transition.

Enable Customizable Campaign Influence

When you're ready to set up Customizable Campaign Influence, enable the feature in Setup and select or create the model you want to use.

Add Customizable Campaign Influence Related Lists

To view Customizable Campaign Influence records, add related lists to campaign, opportunity, and account page layouts. Data in related lists is limited to the model marked as the default model in Setup.

Create a Custom Campaign Influence Model

A custom influence model allows users to manually identify how much a campaign influences an opportunity. You can also set up triggers and processes that create campaign influence records.

Add Influential Campaigns to an Opportunity

When you're using a custom model with Customizable Campaign Influence and the model set as the default, you manually create campaign influence records. Each time a campaign makes an impact on an opportunity, create a record that identifies the influential campaign, and enter an attribution percentage.

Find Campaign Influence Results

Customizable Campaign Influence offers a few ways to explore these influential relationships, from the record-level to a more aggregate view.

How Customizable Campaign Influence Works

Customizable Campaign Influence identifies revenue share with standard and custom attribution models that you can update manually or via automated processes. Add Customizable Campaign Influence data in related lists and reports so that your reps can understand which campaigns impact their opportunity pipeline.

Influence models scan active campaigns to identify members who are also assigned a contact role on an open opportunity. A model creates a campaign influence record based on that relationship. Influence can be assigned manually on an opportunity record or automatically via Apex triggers or the API. After an opportunity's stage is closed (won or lost), influence records are no longer created.

Campaign Influence considers every campaign member, regardless of their member status.

The Customizable Campaign Influence models rely on the Campaign object, the Opportunity object, and a Campaign Influence junction object. When you enable Customizable Campaign Influence, the standard objects CampaignInfluence and CampaignInfluenceModel are added to your org.

You can build a report or dashboard for any active influence model.

Access to Campaign Influence Records

Campaign influence records are exposed to users through related lists and reports. A related list shows data from one model at a time. Choose which model you want to use, and set it as the default.

To allow users to add or edit campaign influence records from opportunity records, the default model must be custom and unlocked.

Note: In Salesforce Classic, the Influenced Opportunities related list displays an opportunity only if the influence is more than 0%. In Lightning Experience, opportunity records display regardless of influence percentage.

Standard vs. Custom Models

The Primary Campaign Source model is the default model that comes with Customizable Campaign Influence. It assigns 100% influence to the campaign noted in the Primary Campaign Source field on an opportunity. It uses auto-association, which means users can't add campaign influence records to the model manually.

Influence records that are created by the Primary Campaign Source model are recalculated when one of these events occurs.

- Any Customizable Campaign Influence setting is changed
- An opportunity's Close Date is changed
- A member is added or removed from a campaign
- An account or opportunity is deleted or undeleted

If the Primary Campaign Source model doesn't meet your business needs, you can create custom models. With a custom model, users manually add or edit an influence percentage in the Campaign Influence related list on an opportunity record. Custom model settings are unlocked by default, so that users can update records themselves. When a custom model is locked, it accepts updates via API only.

Note: Opportunities added by the primary source campaign field appear in Campaign Statistics only when the Primary Source Campaign model is set as the default. If you're using another model, the value shows opportunities added by auto-association only.

The number of custom models you can create varies by your edition.

- Account Engagement Plus, Advanced, and Premium Editions: 5
- Account Engagement Growth Edition: 3
- Salesforce Performance and Unlimited Edition: 5
- Salesforce Professional and Enterprise Edition: 3
- Salesforce Developer Edition: 1

To preserve opportunity data, we don't delete custom campaign influence records when you delete an associated campaign. You can delete campaign influence records from the Opportunity related list or via the API.

Auto-Association Settings

Customizable Campaign Influence models use auto-association to create campaign influence records based on the criteria you set. Criteria can include time frame and campaign types, and you can add other filters using standard fields. The same settings govern all your models. You can set an auto-association time frame in Setup to limit when a member-contact relationship is considered influential.

To allow users to make their own choices about a campaign's percentage of influence, create a custom model. Default and custom models can use auto-association rules based on both standard and custom fields.

More Campaign Influence Models for Marketers

For users of both Sales Cloud and Account Engagement, choose whether to enable the Additional Campaign Influence Models: first touch, last touch, and even distribution. When you enable one of these models, auto-association rules support standard fields only.

If you can't or don't enable these models, your access is limited to the Primary Campaign Source model and custom models only.

- First-Touch—Assigns 100% of influence and revenue earned to the first campaign a prospect touches. Even if a prospect interacts with other marketing assets or activities, this model attributes all of the influence to the first touch. This model relies on the campaign member's Created Date and is for Account Engagement users only.
- Even-Distribution—Assigns an equal percentage of influence and revenue earned to every campaign a prospect touches. This model is for Account Engagement users only.
- Last-Touch—Assigns 100% of influence and revenue earned to the last campaign a prospect touches before a deal is closed. No matter what other campaigns the prospect has interacted with, this model attributes all influence to the final touchpoint. This model relies on the Last Modified Date of the campaign member and is for Account Engagement users only.

Switching to Customizable Campaign Influence

Look at the differences between the two Campaign Influence features and consider what steps are necessary to prepare for transition.

Feature Differences

Customizable Campaign Influence offers a few capabilities that aren't found in the original version of Campaign Influence 1.0.

Feature	Campaign Influence	Customizable Campaign Influence
Available in Salesforce Classic	✓	✓
Available in Lightning Experience		✓
Primary Campaign Source model	✓	✓
Primary Campaign Source field appears on related list (Opportunity records)	✓	
Auto-association with opportunities	✓	✓
Multiple Attribution Models		✓
Flexible Influence Attribution		✓
Locked Models		✓
API Access		✓

Prepare to Switch

In addition, there are differences in how the feature looks and its expected behavior.

- User Permissions—Consider whether a user needs access to edit a campaign or opportunity to create campaign influence records. Identify users with View permissions and verify their needs.
- Report Filters—The new Customizable Campaign Influence models aren't compatible with Campaign Influence 1.0 reports. Create reports that use the new objects and fields.
- Related Lists—The new Customizable Campaign Influence related lists are different from the lists used with Campaign Influence 1.0. Revisit your page layouts and make sure that the correct related lists are added.
- Data Discrepancy—Previously, campaign influence records were created each time a primary campaign source or contact role was identified, even if the same record existed. Customizable Campaign Influence enforces unique relationships in a way that CI 1.0 didn't, so some values can differ from your previous experience.

Enable Customizable Campaign Influence

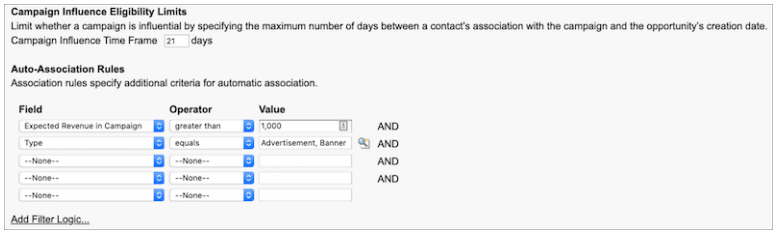
When you're ready to set up Customizable Campaign Influence, enable the feature in Setup and select or create the model you want to use.

For Account Engagement users, we recommend turning on Connected Campaigns before you set up Customizable Campaign Influence. Connecting your campaigns shares Account Engagement marketing data with Salesforce to give you a bigger picture of performance.

1. From Setup, enter `Influence` in the Quick Find box, and then click **Campaign Influence Settings**.
2. Under Campaign Influence, select **Enabled**.
3. If you use Account Engagement, choose whether to enable Additional Campaign Influence Models.

   These models don't support custom fields in auto-association rule criteria.
4. Open **Auto-Association Settings** and enter the criteria you want to use to limit associations by time frame or field values.

   For best results, use the lookup icon to add multiple criteria in the Value fields.



5. To review a model's details, click **Model Settings** and edit a model from the list.
6. To show data in related lists, edit a model and select **Default Model**.

USER PERMISSIONS

To enable Campaign Influence:

- Sales Cloud User, Service Cloud User, or CRM User permission set license

  AND

  Customize Application

To view Campaign Influence records:

- Campaign Influence permission set

  AND

  Read on campaigns and opportunities

  AND

  Marketing User selected in User Detail

Add Customizable Campaign Influence Related Lists

To view Customizable Campaign Influence records, add related lists to campaign, opportunity, and account page layouts. Data in related lists is limited to the model marked as the default model in Setup.

To view and edit Campaign Influence related lists, users need the Campaign Influence permission and a Sales User, Service User, or CRM User permission set license.

Related List	Page Layout	Description
Campaign Influence	Opportunity	Shows campaigns that have touched the opportunity. Users can create Campaign Influence records from here.
Influenced Opportunities	Campaign	Shows opportunities influenced by the campaign. Users can edit Campaign Influence records from here.

Related List	Page Layout	Description
Campaign Influence	Account	Two charts show revenue share grouped by individual campaigns and by campaign type. Expand the list to see opportunities associated with the account alongside related campaign amount, revenue share, and contact name. In the Salesforce mobile app, this related list doesn't include charts.

Note:

- To add additional fields to a related list, such as Lead ID, edit the related list in Page Layouts and select from the Available Fields.Customizing Related Lists
- Some fields from Campaign Influence version 1.0 related lists aren't available in Customizable Campaign Influence related lists. Switching to Customizable Campaign Influence on page 3

Create a Custom Campaign Influence Model

A custom influence model allows users to manually identify how much a campaign influences an opportunity. You can also set up triggers and processes that create campaign influence records.

1. From Setup, enter `Influence` in the Quick Find box, and then click **Model Settings**.
2. Click **New Attribution Model**.
3. Enter a name, unique name, and model description.
4. To show the model's data in related lists, select **Default Model**.
5. To prevent users from creating or editing influence records, select **Locked**.
6. In the Record Preference dropdown, choose whether to create influence records for all records or only for records with revenue attribution of more than 0%.
7. Save your work.

USER PERMISSIONS

To create a custom model:

- Customize Application

  AND

  Read on campaigns and opportunities

  AND

  Marketing User selected in User Detail

Now that the model has been created, you can set up Apex triggers or create influence records via the API.

If your custom model is set as default, users can create influence records manually from an opportunity's Campaign Influence related list.

Add Influential Campaigns to an Opportunity

When you're using a custom model with Customizable Campaign Influence and the model set as the default, you manually create campaign influence records. Each time a campaign makes an impact on an opportunity, create a record that identifies the influential campaign, and enter an attribution percentage.

Important: The Primary Campaign Source model uses an Opportunity field to assign influence. To assign 100% of revenue share, enter a campaign in the Primary Campaign Source field instead of creating a campaign influence record.

USER PERMISSIONS

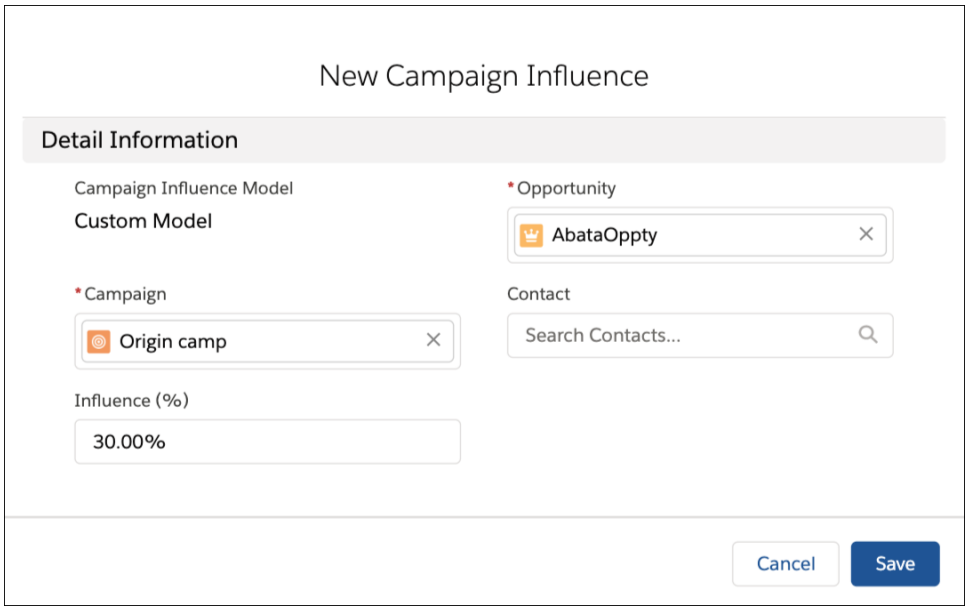
To view, add, or update campaign influence records:

- Read and Edit on campaigns and opportunities

  AND

  Marketing User selected in User Detail

1. On an opportunity record, find the Campaign Influence related list.
2. Click **New**.
3. Enter a campaign name or search for one.
4. Enter an attribution percentage in the **Influence (%)** field.



5. Click **Save**.

Find Campaign Influence Results

Customizable Campaign Influence offers a few ways to explore these influential relationships, from the record-level to a more aggregate view.

To get granular data about specific records, check out the related lists on opportunities, campaigns, and accounts.

To get a broader view of your opportunity pipeline, generate the standard report called Campaigns with Influenced Opportunities (Customizable Campaign Influence). This report provides opportunity data, such as amount, stage, and revenue share alongside helpful campaign details. The Contact column includes primary campaign members only. The Opportunity Contact Role object and cross-filtering are not available in this report. After you generate a source report, you can create a dashboard.

For more control, build custom reports that show relationships such as these examples.

- Campaigns with Influenced Opportunities

- Opportunities with Campaign Influence
- Contacts with Campaign Influence
- Accounts with Campaign Influence

Campaign Influence 1.0

Campaign Influence 1.0 helps identify the return on your campaign investments. It uses the Campaign Influence object to make connections across contacts, campaigns, and opportunities. Campaign Influence 1.0 isn't supported in Lightning Experience. To track influential campaigns in Lightning Experience, switch to Customizable Campaign Influence.

Important: For new users, Customizable Campaign Influence is enabled by default. Not sure which version of Campaign Influence you have?

Search Setup for `campaign influence`, and check the available pages. If the Model Settings page appears, you're using Customizable Campaign Influence.

Primary Campaign Source

Only one campaign in a related list can be marked as the primary campaign source, because it allocates 100% of the attribution to the selected campaign. When you mark a campaign as primary, it's added to the Primary Campaign Source field on the opportunity. For more flexibility, check out Customizable Campaign Influence.

Opportunity statistics, such as Opportunities in Campaign and Won or Closed values, appear only on the campaign marked as the primary source. Opportunity statistics don't appear on other influential campaign records.

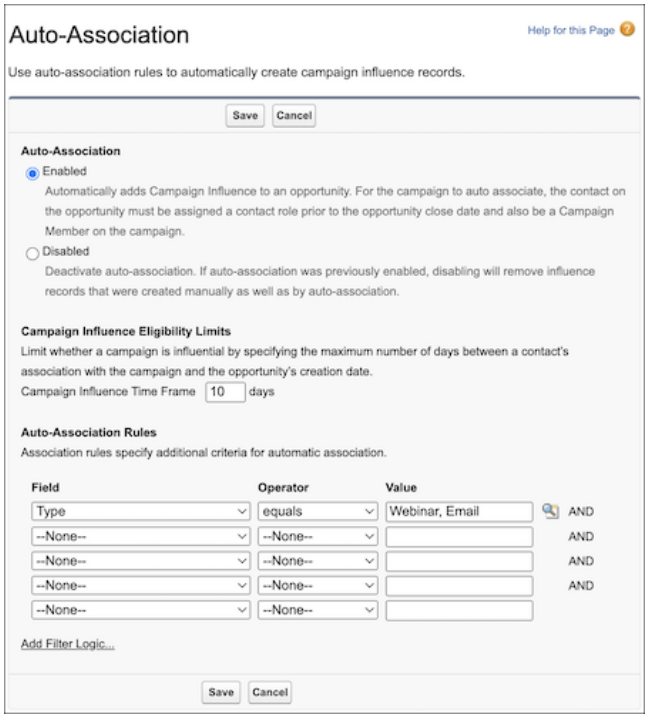
Before you select a primary source campaign, consider workflows or Apex rules that are triggered by changes to an opportunity record.

Auto-Association Settings

With Campaign Influence 1.0, you can choose whether to enable auto-association. When it's turned on, influential campaigns are automatically added to an open opportunity record when a campaign's related contact is assigned an opportunity contact role. You can also apply rules that specify which types of campaigns are considered influential.

- In the Campaign Influence Eligibility Limits section, the time frame field specifies a time period during which a campaign is considered influential. The time frame is the number of days between the date that a contact is added to a campaign and when a related opportunity is created.
- Eligibility limits work only when a contact is related to a campaign first and then assigned an opportunity contact role. Auto-association ignores contacts who are added to campaigns after the related opportunity is created.

Example: Admin Kim enables auto-association and enters a Campaign Influence time frame of 10 days. Customer Gerrie engages with an email and their contact record is added to the New Services campaign on June 15. The next day, Gerrie talks to Parul in Sales, and Parul adds them to an opportunity and assigns an opportunity contact role. The New Services campaign is automatically added to the Campaign Influence related list.



If Parul doesn't assign an opportunity contact role to Gerrie, the campaign isn't added to the related list by auto-association. If Gerrie waits until June 26 to contact Sales, the campaign isn't considered influential, so it isn't added to the related list.

Configure Campaign Influence

To enable Campaign Influence 1.0, add the Campaign Influence related list to Opportunity page layouts and decide whether to configure the optional auto-association settings.

Add Campaign Influence Manually

You can track campaign influence manually by adding it to the Campaign Influence related list. When you add to a campaign manually, you don't select a specific contact, so names and campaign member statuses aren't shown.

Configure Campaign Influence

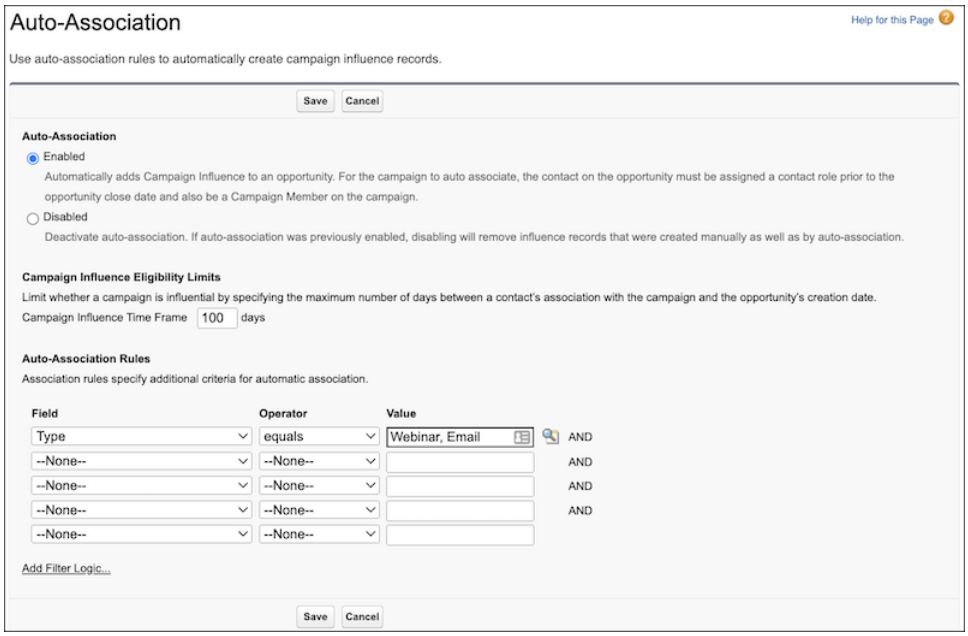
To enable Campaign Influence 1.0, add the Campaign Influence related list to Opportunity page layouts and decide whether to configure the optional auto-association settings.

This information applies only to Campaign Influence 1.0 and not to Customizable Campaign Influence .

USER PERMISSIONS

To set up Campaign Influence:
- Customize Application

1. From Setup, in the Quick Find box, enter `Opportunities`, and select **Page Layouts**.
2. Select a page layout to work with.
3. Drag in the Campaign Influence related list.
4. To turn on auto-association, enter `Influence` in the Quick Find box, open **Auto-Association Settings**, and then select **Enabled**.
5. To customize auto-association, enter a time frame or other rules to limit when a campaign is auto-associated.



6. Save your work.

When auto-association is enabled and the campaign meets the criteria that you specified, it's added automatically to the related list on an open opportunity. The entry includes the contact's name, contact role, and campaign member status.

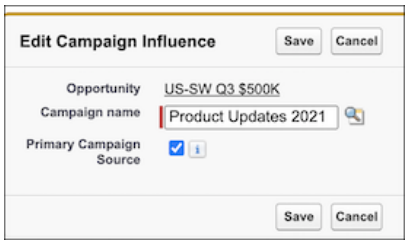
If you don't enable auto-association, users manually add campaigns to the related list.

Add Campaign Influence Manually

You can track campaign influence manually by adding it to the Campaign Influence related list. When you add to a campaign manually, you don't select a specific contact, so names and campaign member statuses aren't shown.

Note: This information applies only to Campaign Influence 1.0 and not to Customizable Campaign Influence.

1. Open an opportunity record.
2. Find the Campaign Influence related list, and click **Add to Campaign**.
3. Enter a campaign name or use the lookup.



4. To allocate 100% of the influence to a campaign, select **Primary Campaign Source**.

USER PERMISSIONS

To view the Campaign Influence related list:

- Read on campaigns

  AND

  Read on opportunities

To manually add influential campaigns:

- Read on campaigns

  AND

  Read and Edit on opportunities

  AND

  Marketing User selected in User Detail

You can select only one campaign as the primary campaign source. To change the selection, deselect the checkbox on one campaign so that you can add it to another.