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# Campaign Influence

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# CAMPAIGN INFLUENCE

Understand how your campaigns are affecting your opportunity pipeline.

## [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](#)

Use the original version of Campaign Influence to understand the return on your campaign investments.

## 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](#)

## [Understanding Customizable Campaign Influence](#)

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 your reps can better 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.

## [Set Up Customizable Campaign Influence](#)

Review prerequisites for Customizable Campaign Influence. Give users access, and create page layouts and reports to set up your reps for success.

### EDITIONS

#### Campaign Influence v1

Available in: Salesforce Classic ([not available in all orgs](#))

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

#### Customizable Campaign Influence v2

Available in: Lightning Experience

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

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

### [Use Customizable Campaign Influence](#)

Customizable Campaign Influence is a flexible tool that combines sales and marketing data. Choose a predefined model or enter custom influence percentages. To see how marketing efforts impact your pipeline, build reports and dashboards based on active models.

## Understanding Customizable Campaign Influence

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 your reps can better understand which campaigns impact their opportunity pipeline.


### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

### How It Works

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.

 **Note:** 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.

 **Note:** Campaign attribution is sometimes confused with campaign alignment. Connected Campaigns is our alignment tool, which creates 1:1 relationships between Pardot campaigns and Salesforce campaigns. Find out more: [Connect Pardot Campaigns to Salesforce Campaigns](#)

### 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.

### 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.

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

- Pardot Plus and Advanced Edition: 5
- 
- Pardot Growth Edition: 3
- Salesforce Performance and Unlimited Edition: 5
- Salesforce Professional and Enterprise Edition: 3
- Salesforce Developer Edition: 1

 **Note:** 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 includes 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.

## More Campaign Influence Models for Pardot

For users of both Sales Cloud and Pardot, choose whether to enable the Additional Campaign Influence Models: first touch, last touch, and even distribution. 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 Pardot users only.

### Even-Distribution

Assigns an equal percentage of influence and revenue earned to every campaign a prospect touches. This model is for Pardot 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 Pardot 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       | ✓                  | ✓                               |
| Auto-association with opportunities | ✓                  | ✓                               |
| Multiple Attribution Models         |                    | ✓                               |
| Flexible Influence Attribution      |                    | ✓                               |
| Locked Models                       |                    | ✓                               |
| API Access                          |                    | ✓                               |

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

## Prepare to Switch

In addition, you can see a few differences in how the feature looks and certain 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 already existed. Customizable Campaign Influence enforces unique relationships in a way that CI 1.0 did not, so some values can differ from your previous experience.



## Set Up Customizable Campaign Influence

Review prerequisites for Customizable Campaign Influence. Give users access, and create page layouts and reports to set up your reps for success.

### [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 specific campaign influences an opportunity. You can also set up triggers and processes that create campaign influence records.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

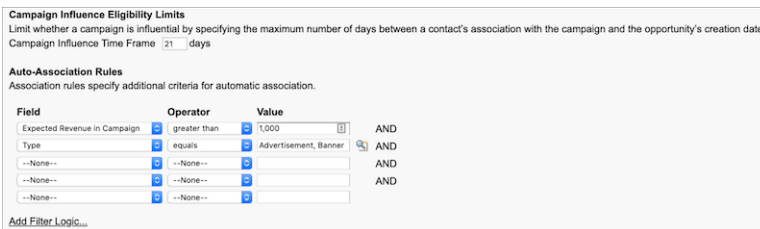
Available in: Salesforce **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## 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 Pardot users, we recommend turning on Connected Campaigns before you set up Customizable Campaign Influence. Connecting your campaigns shares Pardot's 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 Pardot, choose whether to enable Additional Campaign Influence Models.
4. Open **Auto-Association Settings** and choose whether to limit associations by time frame or other criteria.  
Define a number of days for a time frame, or other filtering criteria that must be met before a campaign can be auto-associated to an opportunity.



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**.

## 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. |

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

### 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

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

| Related List             | Page Layout | Description   |
|--------------------------|-------------|---|
| Influenced Opportunities | Campaign    | Shows opportunities influenced by the campaign. Users can edit Campaign Influence records from here.  |
| 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.<br><br>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.[Customize Related Lists](#)

## Create a Custom Campaign Influence Model

A custom influence model allows users to manually identify how much a specific 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.

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.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

### USER PERMISSIONS

- To create a custom model:
- Customize Application
- AND
- Read on Campaigns and Opportunities

## Use Customizable Campaign Influence

Customizable Campaign Influence is a flexible tool that combines sales and marketing data. Choose a predefined model or enter custom influence percentages. To see how marketing efforts impact your pipeline, build reports and dashboards based on active models.

### [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.

## 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.

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.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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

### USER PERMISSIONS

To view, add, or update campaign influence records:

- Read on Campaigns and Opportunities

### New Campaign Influence

Detail Information

|  |                                       |
|--|---------------------------------------|
| <p>Campaign Influence Model<br/>Custom Model</p> | <p>* Opportunity<br/>AbataOppty</p>   |
| <p>* Campaign<br/>Origin camp</p>                | <p>Contact<br/>Search Contacts...</p> |
| <p>Influence (%)<br/>30.00%</p>                  |                                       |

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

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

## Campaign Influence 1.0

Use the original version of Campaign Influence to understand the return on your campaign investments.

Campaign Influence 1.0 is not supported in Lightning Experience. For best performance in Lightning, switch to Customizable Campaign Influence.

### [Set Up Campaign Influence 1.0](#)

To set up and deploy Customizable Campaign Influence, follow these steps.

#### [Add Influential Campaigns to Opportunities](#)

Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.

## Set Up Campaign Influence 1.0

To set up and deploy Customizable Campaign Influence, follow these steps.

 **Note:** This information applies only to [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

### [Configure Campaign Influence](#)

#### [Let Users View Influential Campaigns on Opportunities](#)

Associate multiple influential campaigns to a single opportunity.

## Configure Campaign Influence

 **Note:** This information applies only to [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

## Setting up Campaign Influence

You can configure influential campaigns to be automatically added to opportunities. When automatic association is enabled, influential campaigns are added to opportunities when a campaign is related to a contact that is assigned a contact role on an opportunity prior to the close date of the opportunity. For example, if you have an email campaign with a member who is assigned a contact role on an open opportunity, the email campaign will be added to the Campaign Influence related list for that opportunity.

You can set a Campaign Influence Time Frame that specifies the maximum number of days between the campaign first associated date and the opportunity created date, during which a campaign is considered influential. For example, if you specify a Campaign Influence Time Frame of 15 days and one of your contacts becomes a member of a campaign on June 1, the campaign is considered influential to any opportunity that is created and associated with the contact by June 15. Use the association rules to configure additional criteria that campaigns must meet to be automatically associated to an opportunity.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

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### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS


To set up Campaign Influence:

- [Customize Application](#)

When automatic association is disabled, users must manually add influential campaigns to opportunities using the [Campaign Influence related list](#).

To set up automatic association for campaign influence:

1. From Setup, enter *Campaign Influence* in the Quick Find box, then select **Campaign Influence**.
2. Select **Enabled**.
3. In the **Campaign Influence Time Frame** field, optionally specify the maximum number of days between the campaign first associated date and the opportunity created date.

 **Note:** Campaigns associated to a contact prior to this time frame will not be considered influential. The maximum campaign influence time frame is 9,999 days. If you do not want to specify a campaign influence time frame, leave the **Campaign Influence Time Frame** field blank.

4. Optionally, define additional filter criteria that must be met in order for a campaign to be automatically associated.
5. Click **Save**.

Campaigns will be automatically added to the Campaign Influence related list on opportunities when they meet the criteria you specified.

## Let Users View Influential Campaigns on Opportunities

Associate multiple influential campaigns to a single opportunity.

 **Note:** This information applies only to [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

If enabled, automatic association will add influential campaigns to opportunities when the campaign is related to a contact that is assigned a contact role on the opportunity prior to the opportunity close date. You can specify additional automatic association criteria, including a campaign influence time frame that limits the amount of time a campaign can influence a new opportunity after the campaign first associated date and before the opportunity created date. Influential campaigns can also be added to opportunities manually by clicking the **Add Campaign** button in the Campaign Influence related list.

1. From the object management settings for Opportunities, go to Page Layouts.
2. Add the [Campaign Influence related list](#) to the opportunities page layout.
3. [Set up campaign influence](#).

### EDITIONS

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

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

### USER PERMISSIONS

To set up campaign influence:

- Customize application

To view the campaign influence related list:

- Read on campaigns

AND

Read on opportunities

To manually add influential campaigns:

- Read on campaigns

AND

Edit on opportunities

## Add Influential Campaigns to Opportunities


Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.

 **Note:** This information applies only to [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

Consider these details before adding influential campaigns to your opportunities.

- Though multiple campaigns can be influential, you can designate only one campaign as the primary campaign source on the opportunity.
- The campaign you designate as the primary campaign source will always appear in the Campaign Influence related list.
- The opportunities fields of the campaign statistics section on a campaign detail page will populate for only the campaign you designate as the primary campaign source. For example, you have an email campaign and a telemarketing campaign that both influence the same opportunity, and you designate the email campaign as the primary campaign source. The campaign statistics opportunities fields will populate for only the email campaign.
- When you select `Primary Campaign Source`, the `Primary Campaign Source` field on the opportunity detail page updates with the name of the primary campaign. It's possible that workflow and Apex rules on opportunities can be triggered by this change.
- When you add campaigns using **Add Campaign** in the Campaign Influence related list, campaign member details don't appear in the related list.

Let's now add influential campaigns from the Campaign Influence related list.

1. View the detail page of an opportunity.
2. Click **Add Campaign** in the Campaign Influence related list.
3. Enter a campaign name in the `Campaign name` field or click  to search for a campaign.
4. If you want to designate the campaign as the primary campaign, select `Primary Campaign Source`.
5. Click **Save**.

You can also [configure filter criteria](#) that, when met, will automatically add influential campaigns to opportunities. For example, you can configure a filter to add only email and telemarketing campaigns.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### 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