

🔔 Looking to contact Support? Use Agentforce! [Read More](#)

✕

SALESFORCE HELP > DOCS > FUNDRAISING

# Create Outreach Source Codes for a Campaign


Enhance your campaign management by using outreach source codes to track each appeal of a campaign with details about audience and outreach methods. Salesforce streamlines the creation of source codes, significantly reducing manual entry errors, and improving consistency across campaigns. Marketers can now dedicate more time to strategic campaign planning, ensuring better reporting accuracy and overall campaign effectiveness.

REQUIRED EDITIONS	
Available in: Lightning Experience	
Education Cloud: <b>Enterprise, Performance, Unlimited, and Developer</b> Editions	
Nonprofit Cloud: <b>Enterprise, Unlimited, and Developer</b> Editions	
USER PERMISSIONS NEEDED	
To create a outreach source codes:	FundraisingAccess permission set
	OR
	Education Cloud Full Access permission set

- [Create a Single Outreach Source Code](#)  
Track the effectiveness of a campaign message by using an outreach source code attached to the message.
- [Create Multiple Outreach Source Codes](#)  
Save time and effort by creating the outreach source codes for all campaign messages at once.
- [Add the Outreach Source Code Message](#)  
To keep your campaign messaging organized and well-documented, add your message content to the outreach source code.
- [Add Interest Tags to Outreach Source Codes](#)  
Enhance donor segmentation by assigning interest tags to outreach source codes. Interest tags improve the visibility and organization of audience information.

## Create a Single Outreach Source Code

Track the effectiveness of a campaign message by using an outreach source code attached to the message.

1. Create a campaign or open an existing campaign.
2. From the campaign page, click  and select New Outreach Source Code. Or, go to Outreach Source Codes, and click **New**.
3. Enter details for the new outreach source code.
  - a. Give a descriptive name.
  - b. If source code generation isn't enabled, enter a unique source code.
  - c. In Campaign, search for and select the campaign that the source code is tied to.
  - d. In Usage Type, specify the usage of the outreach source code. This field defaults to Fundraising.
  - e. Indicate if the source code is active.
  - f. In Audience Count, enter the number of person accounts, contacts, and businesses in the audience.



**NOTE** If you performed segmentation in Data Cloud, the focus segment appears in the Outreach Source Code, and it shows a lookup to the market segment.

4. Save your work.

The outreach source code is now available to be applied to the donations received via this fundraising effort.

## Create Multiple Outreach Source Codes

Save time and effort by creating the outreach source codes for all campaign messages at once.

1. From the Campaign page, in the Bulk Outreach Source Code pane, click **Create Bulk Outreach Source Codes**.

2. Select the type of message you intend to use for this batch of outreach source codes.
3. Enter the number of messages you plan to send via the selected channel type.
4. To create source codes for different types of messages for the campaign, click **Add Message Channel** and repeat the previous steps.  
There's a limit of 200 messages per batch.
5. When all message types and number of messages for each message channel are listed, click **Next**.
6. In the table, double-click any empty cells to enter the outreach information.
  - a. To change the columns in this table, set them in the Bulk Outreach Source Codes component in Lightning App Builder.
  - b. To add, remove, or change columns in this table, adjust the columns in the Bulk Outreach Source Codes component in the Lightning App Builder. Save and activate the page as an App Default.
  - c. If the Bulk Outreach Source Codes component is configured to include Message Title and Message Content, enter the message text into the table before you generate the source codes.
  - d. To see any change made to the Bulk Outreach Source Codes component in the Lightning App Builder, refresh the Campaign page.
7. Click **Generate Source Code**.
8. If all rows of the table are completed correctly, click **Save**.
9. On the Campaign page, scroll to find the Outreach Source Codes pane.  
This lists the codes you created for this campaign. You can also create source codes and edit or delete the source codes in this pane. If you don't see this pane, add the Bulk Outreach Source Codes component to the Campaign page layout in the Lightning App Builder.

## Add the Outreach Source Code Message

To keep your campaign messaging organized and well-documented, add your message content to the outreach source code.

Creating the source code is only the beginning of using outreach source codes with a campaign. These codes serve as identifiers that help you track the performance of each message. After you create the outreach source codes for a campaign, add the message that's associated with each code. Or, if you're creating outreach source codes in bulk, add the message, title, content, and channel information by filling out those cells in the bulk creation table.

1. From the Outreach Source Codes pane on the Campaign page, click the source code that you want to craft a message for.
2. On the outreach source code page, under the Message Details heading, enter the message content.
  - a. Enter the message title.
  - b. Enter the message content.
  - c. Enter the message channel platform account.  
For example, enter your Facebook account for a Facebook digital ad outreach message.
  - d. Enter the date that this message is sent.
3. Save your work.

SEE ALSO

[Create a Campaign](#)

[Campaign Fields](#)

[Get to Know Salesforce Campaigns](#)

## Add Interest Tags to Outreach Source Codes

Enhance donor segmentation by assigning interest tags to outreach source codes. Interest tags improve the visibility and organization of audience information.

### REQUIRED EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Education Cloud

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with the Nonprofit Cloud

### USER PERMISSIONS NEEDED

To create outreach source codes:	FundraisingAccess permission set
	OR
	Education Cloud Full Access permission set



**NOTE** If you're unable to add interest tags, check if interest tags are enabled on the Outreach Source Code object. To use interest tags with source codes, the interest tags must be enabled.

1. From the Outreach Source Code record page, in the Interest Tags pane, search or browse for interest tags.
2. Add the relevant interest tags to the source code.

SEE ALSO:

- [Interest Tags](#)
- [Enable Features that Enhance Fundraising](#)

**DID THIS ARTICLE SOLVE YOUR ISSUE?**

Let us know so we can improve!

 Yes

 No