Campaign Member Status Data Migration

This document discusses the best practices for migrating Campaigns, CampaignMembers, and CampaignMemberStatus records with the Metazoa Snapshot data migration tools. This migration is complicated by some unusual server-side validations for the CampaignMemberStatus object. Follow the five steps below for a successful migration. You must start out with no Campaigns, CampaignMembers, or CampaignMemberStatus records on the destination org.

Step 1

Migrate all the source Campaigns to the destination org. This operation will automatically create two CampaignMemberStatus records for each Campaign that was migrated. The CampaignMemberStatus records will have the labels "Sent" and "Responded." The "Sent" records will have the IsDefault flag set to true. You cannot delete these existing CampaignMemberStatus records. They must be updated, replaced, and then deleted.

Step 2

Change the CampaignMemberStatus object Label field from "Sent" or "Responded" to "delete1" and "delete2." Change the CampaignMemberStatus object SortOrder field from "1" or "2" to "1001" and "1002." This can be done with the Remap Fields interface in Manage Datasets or the Scramble Fields interface in Migrate Datasets. The goal here is to give the existing CampaignMemberStatus records a unique label value and sort order that can be deleted later in the process.

Step 3

Next, migrate all the source CampaignMemberStatus records to the destination. They will match Campaign by external ID and claim the default value from the old CampaignMemberStatus records that will be deleted.

Step 4

Now you can delete the CampaignMemberStatus records with the "delete1" and "delete2" labels. This can be done with the Delete Filter interface in the Range Cutter application found in Manage Datasets. You can delete them now because they do not have the IsDefault flag set to true any longer and there are no attached CampaignMember records.

Step 5

Migrate all the CampaignMembers to the destination org. This must be done AFTER the CampaignMemberStatus records are finished. This will complete the migration.