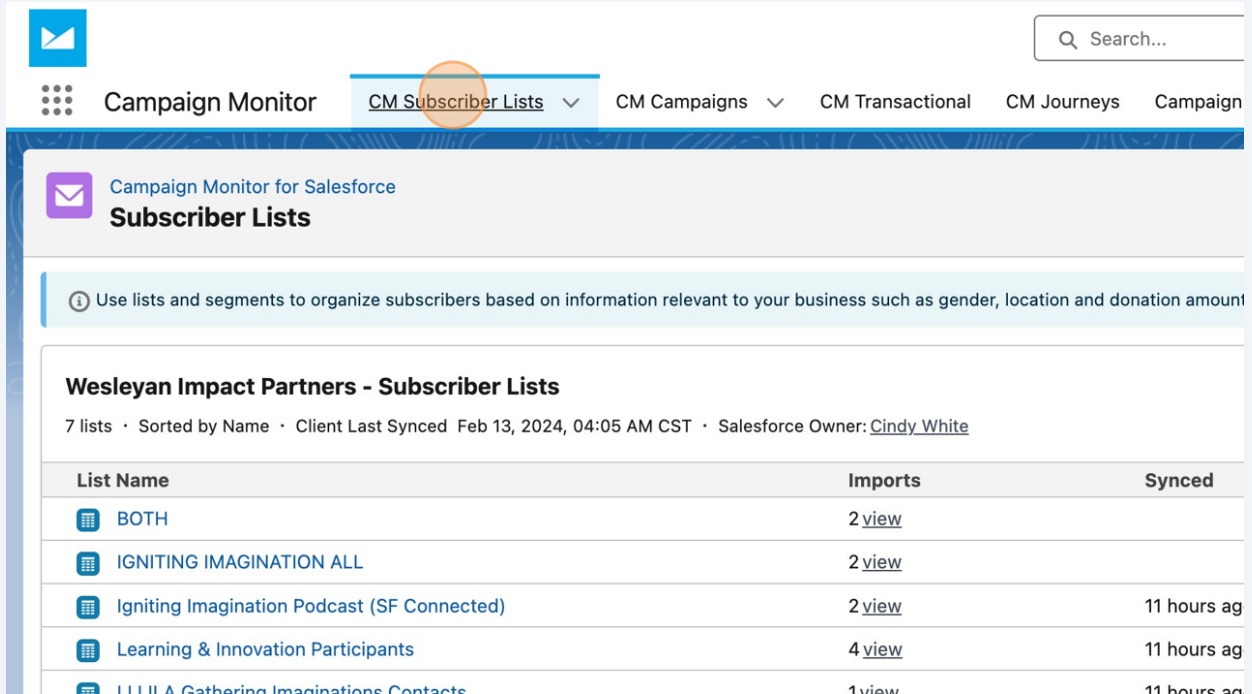


How to Refresh a Salesforce Report for Campaign Monitor

1 Navigate to [Salesforce](#)

2 Click "CM Subscriber Lists"



The screenshot shows the Campaign Monitor interface. At the top, there is a navigation bar with a search box and several menu items: Campaign Monitor, CM Subscriber Lists (highlighted with an orange circle), CM Campaigns, CM Transactional, CM Journeys, and Campaign. Below the navigation bar, the main content area displays the 'Campaign Monitor for Salesforce Subscriber Lists' section. A blue banner at the top of this section contains the text: 'Use lists and segments to organize subscribers based on information relevant to your business such as gender, location and donation amount'. Below this banner, the section is titled 'Wesleyan Impact Partners - Subscriber Lists' and includes the text: '7 lists · Sorted by Name · Client Last Synced Feb 13, 2024, 04:05 AM CST · Salesforce Owner: [Cindy White](#)'. A table below this text lists several subscriber lists with columns for List Name, Imports, and Synced.

List Name	Imports	Synced
BOTH	2 view	
IGNITING IMAGINATION ALL	2 view	
Igniting Imagination Podcast (SF Connected)	2 view	11 hours ag
Learning & Innovation Participants	4 view	11 hours ag
U I I I A Gathering Imaginations Contacts	1 view	11 hours ag

3 Select which Campaign Monitor Client by clicking this dropdown.

The screenshot shows the Campaign Monitor interface. At the top, there are navigation tabs for Leads, Contacts, Campaigns, and Reports. Below these, there are buttons for 'Create List', 'Reports', and a dropdown menu currently set to 'Wesleyan Impact Partners'. A search bar labeled 'Search By Name' is also visible. Below the search bar is a table with columns for Bounced, Deleted, Unsubscribed, and Active. The table contains five rows of data.

Bounced	Deleted	Unsubscribed	Active
0	0	0	349
0	0	0	4,109
71	15	197	3,897
1	5	30	1,223
0	0	10	30

4 Select the list you want to refresh

The screenshot shows a list of lists in Campaign Monitor. The list is sorted by name and shows 7 lists. The columns are List Name, Imports, and Synced. The list 'WI ALL' is highlighted with an orange circle.

List Name	Imports	Synced
BOTH	2 view	
IGNITING IMAGINATION ALL	2 view	
Igniting Imagination Podcast (SF Connected)	2 view	11 hours ag
Learning & Innovation Participants	4 view	11 hours ag
LI LILA Gathering Imaginations Contacts	1 view	11 hours ag
Wesleyan Impact Partners Subscription	8 view	11 hours ag
WI ALL	2 view	

5 Click "Import Wizard"

WI ALL



View subscribers associated with a Subscriber List. Use the **Refresh** button to sync the latest update

Subscriber Lists Members

50+ items · Sorted by Subscribed · Never Synced

Name	Email Address
★ Alison Flaum	a-flaum@law.northwestern.edu
★ Aasif Bade	abade@ambrosepg.com
★ Abigail Rusert	abigail.rusert@ptsem.edu
★ Adam Borneman	aborneman@mministry.org
★ AnnMarie Brown	abrown@circlesandciphers.org
★ Archana Carey	acarey@calpacumc.org
★ Andy Clarno	aclarano@uic.edu
★ San Unknown	admin@encinitaschurch.com
★ Adrienne Ingrum	adrienne.ingrum@hbgusa.com

6 Click here.

Last Run	Next Run	Run As	Id	Status
2 minutes ago		Ryan Collier	SI-0193	Completed 
2 minutes ago		Ryan Collier	SI-0198	Completed 

7 Click "Run Now"

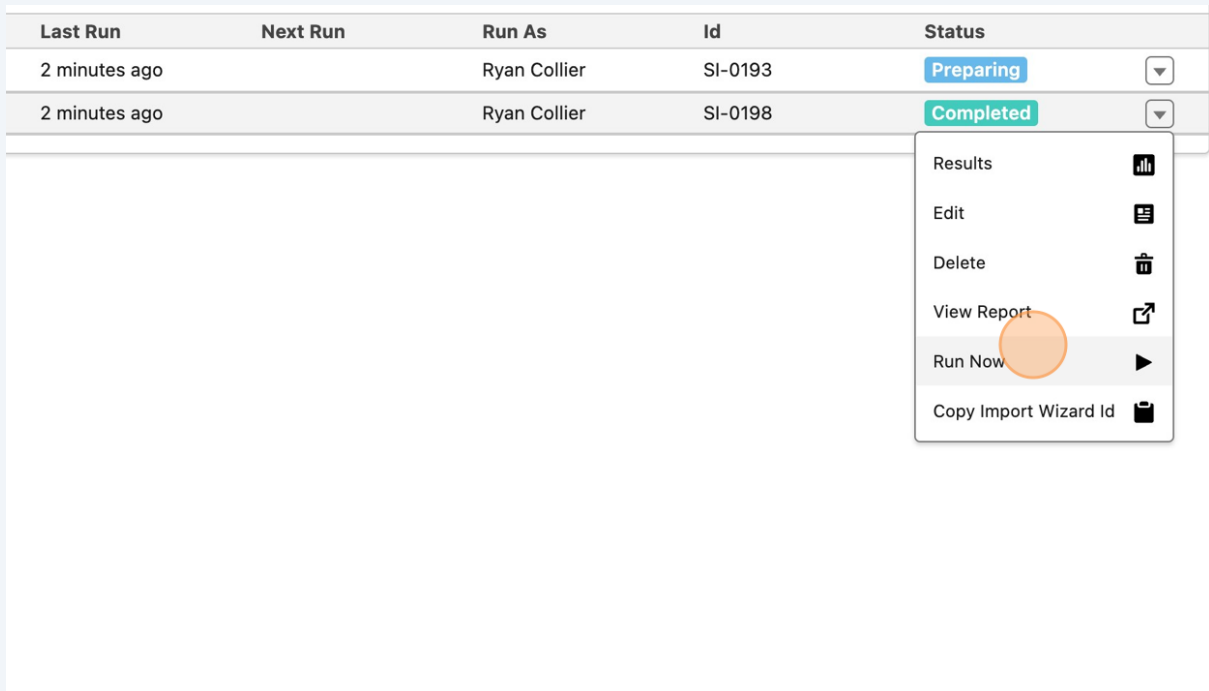
Last Run	Next Run	Run As	Id	Status
2 minutes ago		Ryan Collier	SI-0193	Completed
2 minutes ago		Ryan Collier	SI-0198	



The screenshot shows a table with two rows. The first row has a status of 'Completed'. The second row has an empty status field. A dropdown menu is open for the second row, listing several actions: Results, Edit, Delete, View Report, Run Now, and Copy Import Wizard Id. The 'Run Now' option is highlighted with an orange circle.

8 Repeat for all segments within the list

Last Run	Next Run	Run As	Id	Status
2 minutes ago		Ryan Collier	SI-0193	Preparing
2 minutes ago		Ryan Collier	SI-0198	Completed



The screenshot shows a table with two rows. The first row has a status of 'Preparing'. The second row has a status of 'Completed'. A dropdown menu is open for the second row, listing several actions: Results, Edit, Delete, View Report, Run Now, and Copy Import Wizard Id. The 'Run Now' option is highlighted with an orange circle.



Once the Status changes from Preparing to Complete your list has been refreshed.

9

Go to the list in Campaign Monitor to verify update has occurred



You verify by checking the numbers, Campaign Monitor's Numbers should be the same as the Salesforce Report Numbers.

10







To See how many people are in a Salesforce report, click here.

Last Run	Next Run	Run As	Id	Status
10 minutes ago		Ryan Collier	SI-0193	Completed
11 minutes ago		Ryan Collier	SI-0198	Completed


The screenshot shows a table with five columns: Last Run, Next Run, Run As, Id, and Status. The first two rows of data are visible. The first row has '10 minutes ago' in the Last Run column, 'Ryan Collier' in the Run As column, 'SI-0193' in the Id column, and a green 'Completed' button in the Status column. The second row has '11 minutes ago' in the Last Run column, 'Ryan Collier' in the Run As column, 'SI-0198' in the Id column, and another green 'Completed' button in the Status column. A small downward-pointing arrow icon is visible to the right of the second 'Completed' button, and it is circled in orange.

11 Click "View Report"


Last Run	Next Run	Run As	Id	Status	
10 minutes ago		Ryan Collier	SI-0193	Completed	▼
11 minutes ago		Ryan Collier	SI-0198	Completed	▼

- Results 
- Edit 
- Delete 
- View Report** 
- Run Now 
- Copy Import Wizard Id 

12 View the number under "Total Records"



Campaign Monitor
CM Subscriber Lists ▼
CM Campaigns ▼
CM Transactional
CM Journeys
Campaign



Report: Leads

WI All - Leads

Leads imported from CM - WI All

Total Records	Total TMF	Total TMF & WI (Marketing)	Total TMF Only (Marketing)	Total WI	Total WI Only (Marketing)
591	1	0	0	39	552

	Lead ID	First Name	Last Name	Email	Lead Source	Marketir
1	00Q6e00001cARBv	Unknown	Zuckerman	rzuckerman@gnjumc.org	Marketing	Email Up
2	00Q6e00001cARCA	Unknown	Zscheile	dzscheile001@luthersem.edu	Marketing	Email Up
3	00Q6e00001cARCB	Unknown	Ziegeldorf	barney8336@rcn.com	Marketing	Email Up
4	00Q6e00001cARCC	Unknown	Zeigler	jzeigler@depaul.edu	Marketing	Email Up
5	00Q6e00001cARCD	Unknown	Zandanel	markzandanel@neighbours-inc.com	Marketing	Email Up
6	00Q6e00001cARCE	Unknnown	Yong	debbieklau@gmail.com	Marketing	Email Up

13 Click "591"

Campaign Monitor | CM Subscriber Lists | CM Campaigns | CM Transactional | CM Journeys | Campaign

Report: Leads
WI All - Leads
Leads imported from CM - WI All

Total Records	Total TMF	Total TMF & WI (Marketing)	Total TMF Only (Marketing)	Total WI	Total WI Only (Marketing)
591	1	0	0	39	552

	Lead ID	First Name	Last Name	Email	Lead Source	Marketir
1	00Q6e00001cARVv	Unknown	Zuckerman	rzuckerman@gnjumc.org	Marketing	Email Up
2	00Q6e00001cARCA	Unknown	Zscheile	dzscheile001@luthersem.edu	Marketing	Email Up
3	00Q6e00001cARCB	Unknown	Ziegeldorf	barney8336@rcn.com	Marketing	Email Up
4	00Q6e00001cARCC	Unknown	Zeigler	jzeigler@depaul.edu	Marketing	Email Up
5	00Q6e00001cARCD	Unknown	Zandanel	markzandanel@neighbours-inc.com	Marketing	Email Up
6	00Q6e00001cARCE	Unknknown	Yong	debbieklau@gmail.com	Marketing	Email Up

14 Click "591"

Campaign Monitor | CM Subscriber Lists | CM Campaigns | CM Transactional | CM Journeys | Campaign

Report: Leads
WI All - Leads
Leads imported from CM - WI All

Total Records	Total TMF	Total TMF & WI (Marketing)	Total TMF Only (Marketing)	Total WI	Total WI Only (Marketing)
591	1	0	0	39	552

	Lead ID	First Name	Last Name	Email	Lead Source	Marketir
1	00Q6e00001cARVv	Unknown	Zuckerman	rzuckerman@gnjumc.org	Marketing	Email Up
2	00Q6e00001cARCA	Unknown	Zscheile	dzscheile001@luthersem.edu	Marketing	Email Up
3	00Q6e00001cARCB	Unknown	Ziegeldorf	barney8336@rcn.com	Marketing	Email Up
4	00Q6e00001cARCC	Unknown	Zeigler	jzeigler@depaul.edu	Marketing	Email Up
5	00Q6e00001cARCD	Unknown	Zandanel	markzandanel@neighbours-inc.com	Marketing	Email Up
6	00Q6e00001cARCE	Unknknown	Yong	debbieklau@gmail.com	Marketing	Email Up