

## **Salesforce Dashboards** <sup>[1]</sup>

April 22, 2021 by [Melanie Jones](#) <sup>[2]</sup>

Salesforce Dashboards can provide easy-to-understand, quantifiable data on Marketing Cloud email sends and Cvent events - among other things. When used in combination with other information and your own criteria of success, it will help paint a more complete picture of your outreach efforts.

The different Dashboards that are available on the Salesforce homepage build on one another by viewing similar email data from varying angles. To date, we've released two sets of Dashboards to help address:

- *How* are my Business Unit's emails performing?
- *When* are my Business Unit's emails performing?

### **Fall 2023 Campus Sessions**

- CU Denver & System | Sept. 26
- UCCS | Sept. 12
- CU Anschutz | Sept. 28

### **Available Dashboard Deep Dive**

- When Emails Perform
- How Emails Perform

#### **When are my Business Unit's emails performing?**

- Can you identify any trends in the day of the week or time of day that your audience seems to engage differently?
- Can you identify any trends in your sending habits?
- Are there opportunities to test how an email sent on a different day would be received?

[Presentation](#) <sup>[3]</sup>

#### **How are my Business Unit's emails performing?**

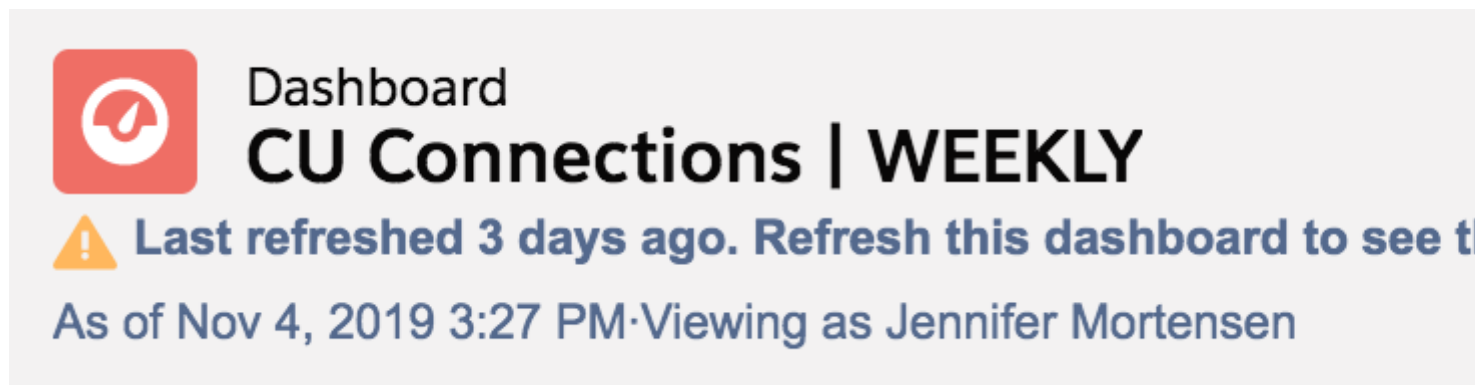
- How many emails do you send and what's the average open/click rate?
- Are there any trends in your sending habits?
  - Are there any outliers? If yes, how can you explain them?
- Are there any trends in how your messages are received?

Deep Dive Presentation [4]

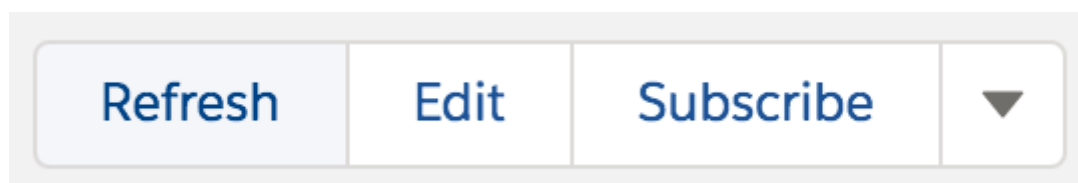
## Tips for leveraging Salesforce Dashboards to their fullest potential.

### Refresh Dashboards

When you're viewing a Salesforce dashboard, you might notice that the last refreshed date occurred in the past. Here's an example:



To refresh the dashboard so it reflects the most current data, click the **refresh** button in the upper right corner of the screen.



The dashboard will refresh with the most current data.

### Filter Dashboards

The dashboards available on the Salesforce Homepage are able to be filtered to showcase email information specific to a campus or business unit during a particular timeframe. It's the fastest and most efficient means of getting a pulse on your campus'/units' work and how it compares to others.

- Login to [Salesforce](#) [5]
- On the left are Dashboards for all of eComm. On the right side, you'll see a block labeled **Business Unit Dashboards**

- Available Business Unit Dashboards are broken down by the question it will help you address. Current options include:
  - *How* are emails performing?
  - *When* are emails performing?
- Select your campus Dashboard



All ▼



eComm

Home

Chatter

Reports ▼

Campaigns ▼

Dashboards ▼

Contacts ▼



Dashboard

## How are CU's emails performing?

As of Mar 24, 2021 10:26 AM-Viewing as Melanie Jones

Campus

All ▼

Date Sent

All

Emails Sent



# 16k

How many emails have been se  
[View Report \(08 ECOMM OG Ei](#)

Emails Delivered

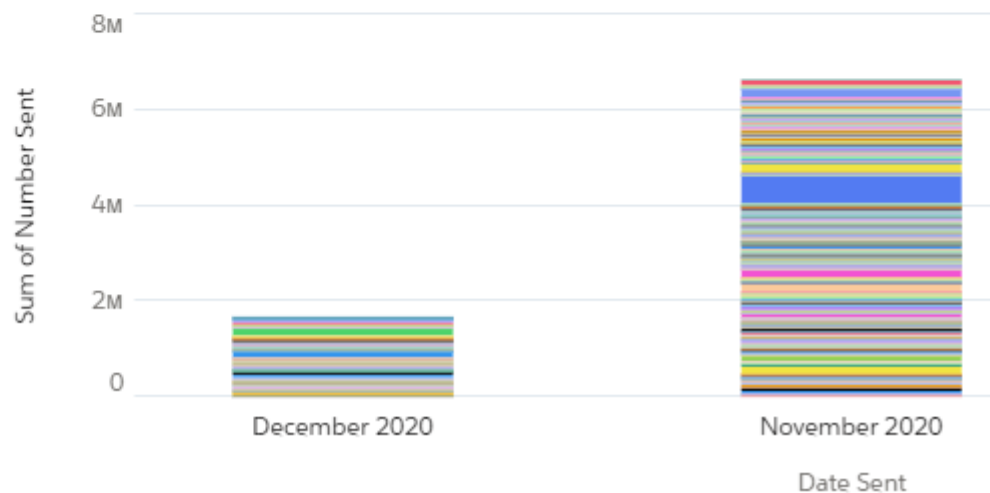


# 125M

How many people have receiver  
[View Report \(08 ECOMM OG Ei](#)

### Total Emails Sent by Month and Subject Line

Scroll right to view all subject lines.



When do audiences receive the highest number of communications? How can you be more s  
[View Report \(08 ECOMM OG Email Sends by Month\)](#)



Dashboard

## When are CU's emails performing?

As of Mar 24, 2021 10:23 AM-Viewing as Melanie Jones

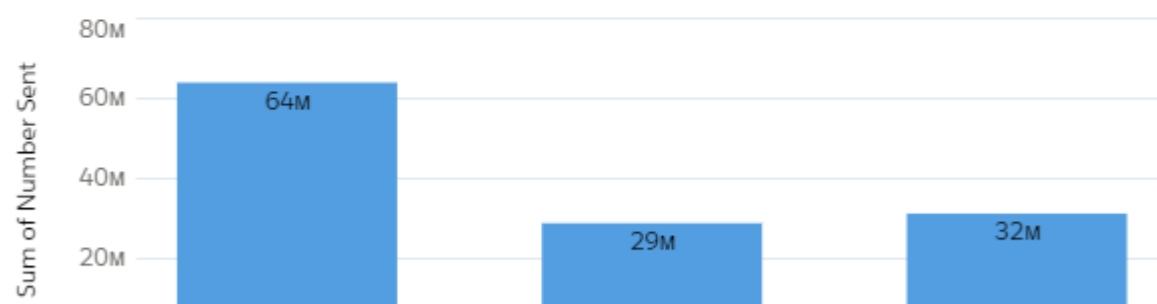
Campus

All ▼

Date Sent

All

### Emails Sent by Time of Day



### Average C

1 Morning

2 Afternoon

- In the new tab, **filter the Dashboard** by Business Unit and/or Date Sent timeframe (it will automatically refresh - give it a minute)

The screenshot shows the Salesforce eComm dashboard interface. At the top, there's a navigation bar with 'eComm', 'Home', 'Chatter', 'Reports', 'Campaigns', and 'Dashboards'. The dashboard title is '03 Denver Email Send Dashboard with Filter'. Below the title, it says 'As of Jul 22, 2020 1:04 PM Viewing as Melanie Jones'. A red box highlights the 'Business Unit' filter dropdown menu, which is currently set to 'All'. The dropdown list includes 'All' (checked), 'starts with CU Denver', 'equals CU Denver Alumni Relations', 'equals CU Denver Annual Giving', 'equals CU Denver Architecture and Planning', and 'equals CU Denver Arts & Media'. Below the filter, a bar chart titled 'Email Delivered' is visible, showing a sum of 2M.

**Don't see any data?** It may be due to having multiple filters applied that do not make sense. If you continue to not see any data, contact your eComm specialist.

## Access Other Dashboards

1. Login to [Salesforce](#) [6]
2. Select **Dashboards** in the top navigation
  - Dashboards you recently viewed will automatically display
3. Click **All Dashboards** listed on the left of the screen

4. Select the Dashboard Name to view it

The screenshot shows the Salesforce interface. At the top, the navigation bar includes 'All', 'Search Salesforce', and various app icons. The 'Dashboards' icon is highlighted with a red box and a red number '2'. Below the navigation bar, the 'Dashboards' section is visible. In the left sidebar, the 'All Dashboards' link is highlighted with a red box and a red number '3'. The main content area displays a list of dashboards with the following columns: DASHBOARD NAME, DESCRIPTION, and FOLDER. The list includes several dashboards, such as '01 ADVM OG CUBAdvEmailActivity' and '01 ADVM OG FBIColorado Email Sends'.

DASHBOARD NAME	DESCRIPTION	FOLDER
01 ADVM OG CUBAdvEmailActivity		01 ADVM
01 ADVM OG FBIColorado Email Sends		01 ADVM
01 CU Boulder OG Todays Email Sends & Events		08 Cam
01 _ALUM_190101_EventActivity		01 ADVM
02 CU Anschutz OG Todays Email Sends & Events		08 Cam
03 CU Denver OG Todays Email Sends & Events		08 Cam
03 UCD OG Todays Email Sends & Events _ MEL		Private D

**REFRESH** Once your Dashboard is open, you might need to click *Refresh* in the top right corner to get the most up-to-date data.

## Subscribe to Dashboards

Subscribing to Dashboards (up to five) delivers dashboard information to your inbox at a cadence you choose. Follow these steps to subscribe yourself:

1. Navigate to the Dashboard to which you wish to subscribe (instructions above)
2. In the top right corner, click **Subscribe**
3. A popup will allow you to schedule your subscription:
  - o **Frequency:** Daily/Weekly/Monthly
  - o **Day(s):** Any day of the week
  - o **Time:** Any time of day, on the hour
4. Click the blue **Save** button in the bottom right of the pop-up

Reports ▾ Affiliations ▾ Email Sends ▾ Dashboards ▾ Contacts ▾

eComm

Number of E

View Report (08)

## Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

### Schedule

Frequency

Daily Weekly Monthly

Days

Sun Mon Tue Wed Thu Fri Sat

Time

1:00 PM ▾

☒ Receive new results by email when dashboard is refreshed. ⓘ

CU Boulder Center for  
CU Boulder Co  
CU Boulder Department of  
CU Boulder Leeds Scho

**LIMITATION** Only active Salesforce users can be subscribed to Salesforce Dashboards. The subscription email contains all visual components of the Dashboard without any filters applied. In other words, the email will not display filtered data as viewed in Salesforce.

## Favorite Dashboards

If you find yourself consistently navigating back to the same dashboards, using the favorite feature can save you clicks (and time).

- Login to Salesforce
- Click **Dashboards** in the top navigation
- Select **All Dashboards** listed down the left
- Search for the name of the Dashboard (in this example, 'filter')

- Once you see the name of the dashboard you wish to favorite, click the **down arrow** in the last column.
  - You may have to scroll the the left to see the last column.
- Click **Favorite** in the dropdown.

The screenshot shows the Salesforce eComm interface. In the top navigation bar, the 'Dashboards' dropdown is highlighted with a red box and a red number '1'. Below this, the 'Dashboards' section is visible, showing a list of 10 items. In the left sidebar, the 'All Dashboards' option is highlighted with a red box and a red number '2'.

DASHBOARDS	Dashboard Name	Description
Recent	01 Boulder Email Send Dashboard with Filter	
Created by Me	02 Anschutz Email Send Dashboard with Filter	
Private Dashboards	03 Denver Email Send Dashboard with Filter	
<b>All Dashboards</b>	04 UCCS Email Send Dashboard with Filter	
	05 Email Sends with Aggregate Link Level Details Filtered	
FOLDERS	08 IER Filtered	
All Folders	08 System Email Send Dashboard with Filter	
Created by Me	08 UREL Kennedv eNews with Filter	

Now you can easily navigate to your favorites in two different ways:

- Select the **My Favorites dropdown** in the top-right corner of Salesforce.
- All favorites will be listed below.





All ▼



Search...



eComm

Home

Chatter

Reports ▼

Campaigns ▼

Dashboards



Dashboard

## All Email Send Dashboard with Filter

As of Jul 22, 2020 12:14 PM Viewing as Melanie Jones

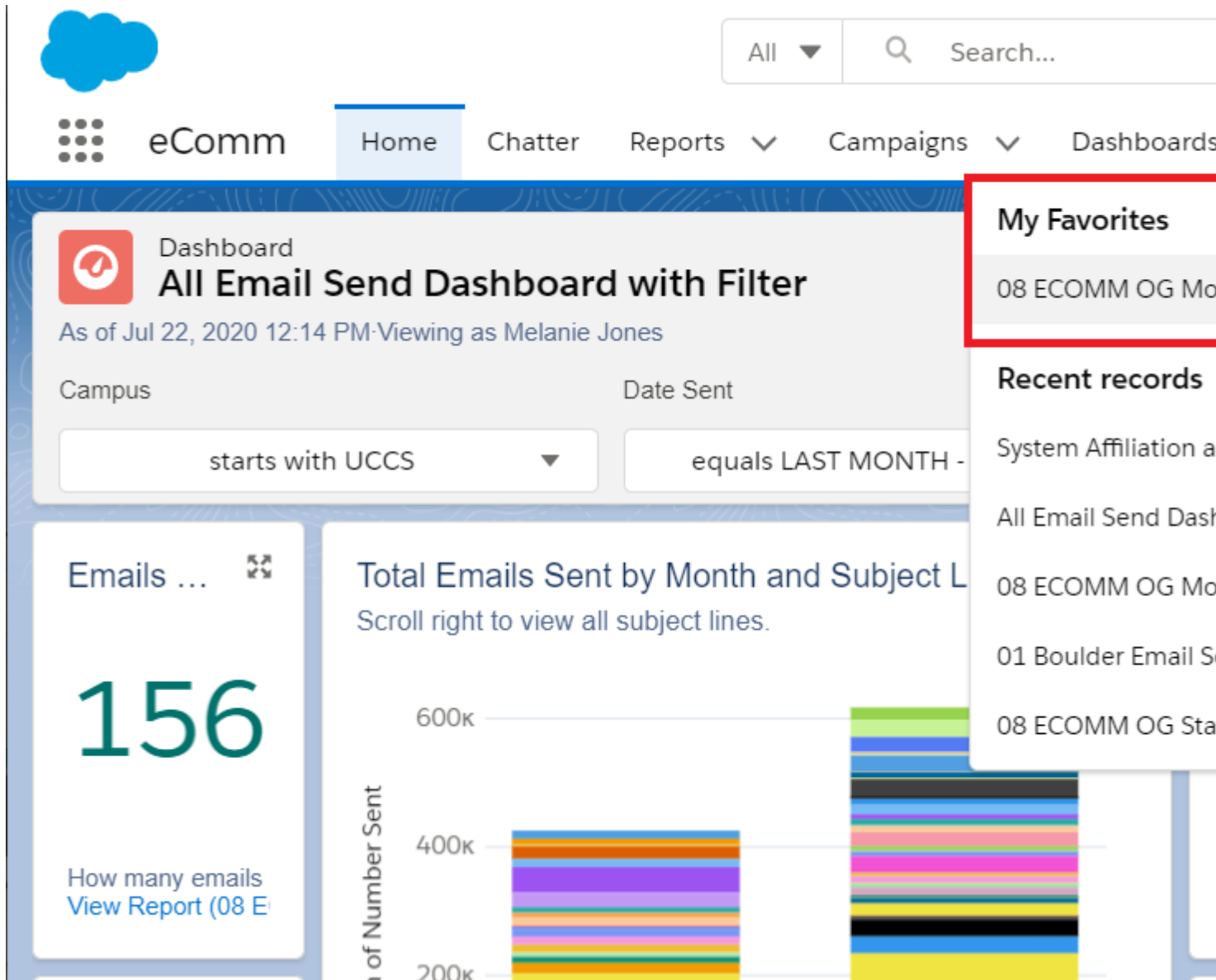
Campus

Date Sent

starts with UCCS ▼

equals LAST MONTH - TODAY ▼

- Select the **dropdown arrow to the right of Dashboards** in the top navigation.
- Your favorite Dashboards will be pinned to the top.



## Limitations

**Upvote This Idea** We fully understand the desire to have a Dashboard emailed to you with the filter applied. Unfortunately, Salesforce functionality does not currently support this. [Upvote this idea in the Salesforce Community \[7\]](#) and you will be notified if it's prioritized.

As you subscribe to dashboards, take note of [these limitations \[8\]](#):

- You can subscribe to filtered dashboards, but **dashboard filters are never applied to emailed dashboards**. When you open the email, the dashboard is displayed unfiltered.
- Each user can set up subscriptions for up to 5 dashboards.

## Related Content

- [Why can't I see a Salesforce dashboard? \[9\]](#)
- [A/B Testing \[10\]](#)
- [Sending a Test Email in Marketing Cloud \[11\]](#)
- [I want a dashboard for my email sends like the one on the Salesforce homepage. How do I create one?](#)

[12] (for eComm specialists only)

**Display Title:**

Salesforce Dashboards

**Send email when Published:**

No

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**Source URL:**<https://www.cu.edu/blog/ecommerce-wiki/salesforce-dashboards>

**Links**

[1] <https://www.cu.edu/blog/ecommerce-wiki/salesforce-dashboards> [2] <https://www.cu.edu/blog/ecommerce-wiki/author/39>

[3]

<https://docs.google.com/presentation/d/1OsQT9uTAbTFTfSAAXAtaJn3lGOUXASqfkJH3LK2okYA/edit?usp=sharing>

[4]

[https://docs.google.com/presentation/d/1yn\\_FEkDDm3YAu9V5XYvTiOT1l6984J4ykaOwaPJwPbl/edit?usp=sharing](https://docs.google.com/presentation/d/1yn_FEkDDm3YAu9V5XYvTiOT1l6984J4ykaOwaPJwPbl/edit?usp=sharing)

[5] <http://cuecommerce.my.salesforce.com/> [6] <https://cuecommerce.my.salesforce.com/>

[7] <https://trailblazer.salesforce.com/ideaView?id=087300000000113uAAA>

[8] [https://help.salesforce.com/articleView?id=sf.dashboards\\_subscribe\\_lex.htm&type=5](https://help.salesforce.com/articleView?id=sf.dashboards_subscribe_lex.htm&type=5)

[9] <https://www.cu.edu/blog/ecommerce-wiki/salesforce-visibility-and-sharing> [10]

<https://www.cu.edu/blog/ecommerce-wiki/ab-testing> [11] <https://www.cu.edu/blog/ecommerce-wiki/sending-test-email> [12] <https://www.cu.edu/blog/ecommerce-wiki/creating-dashboard>