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Salesforce Dashboards [1]

April 22, 2021 by Melanie Jones [2]

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 [3]

How are my Business Unit's emails performing?

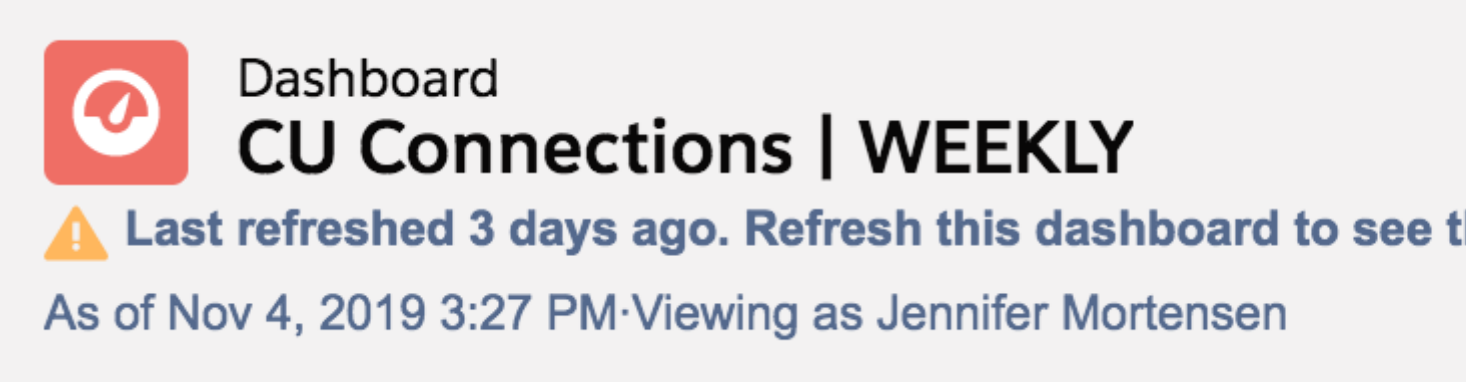
- How many emails do you send and what's the average open/click rate?
- Are there any trends in your sending habits?
    - Are there any outliers? If yes, how can you explain them?
- Are there any trends in how your messages are received?

Deep Dive Presentation [4]

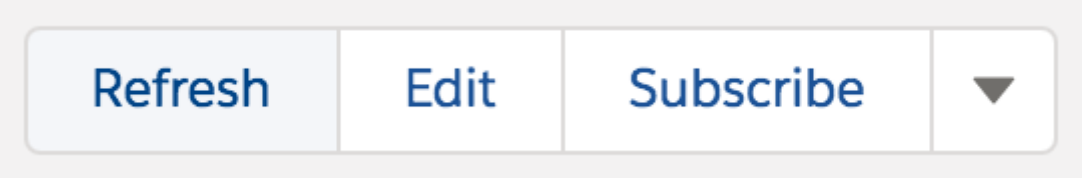
Tips for leveraging Salesforce Dashboards to their fullest potential.

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**

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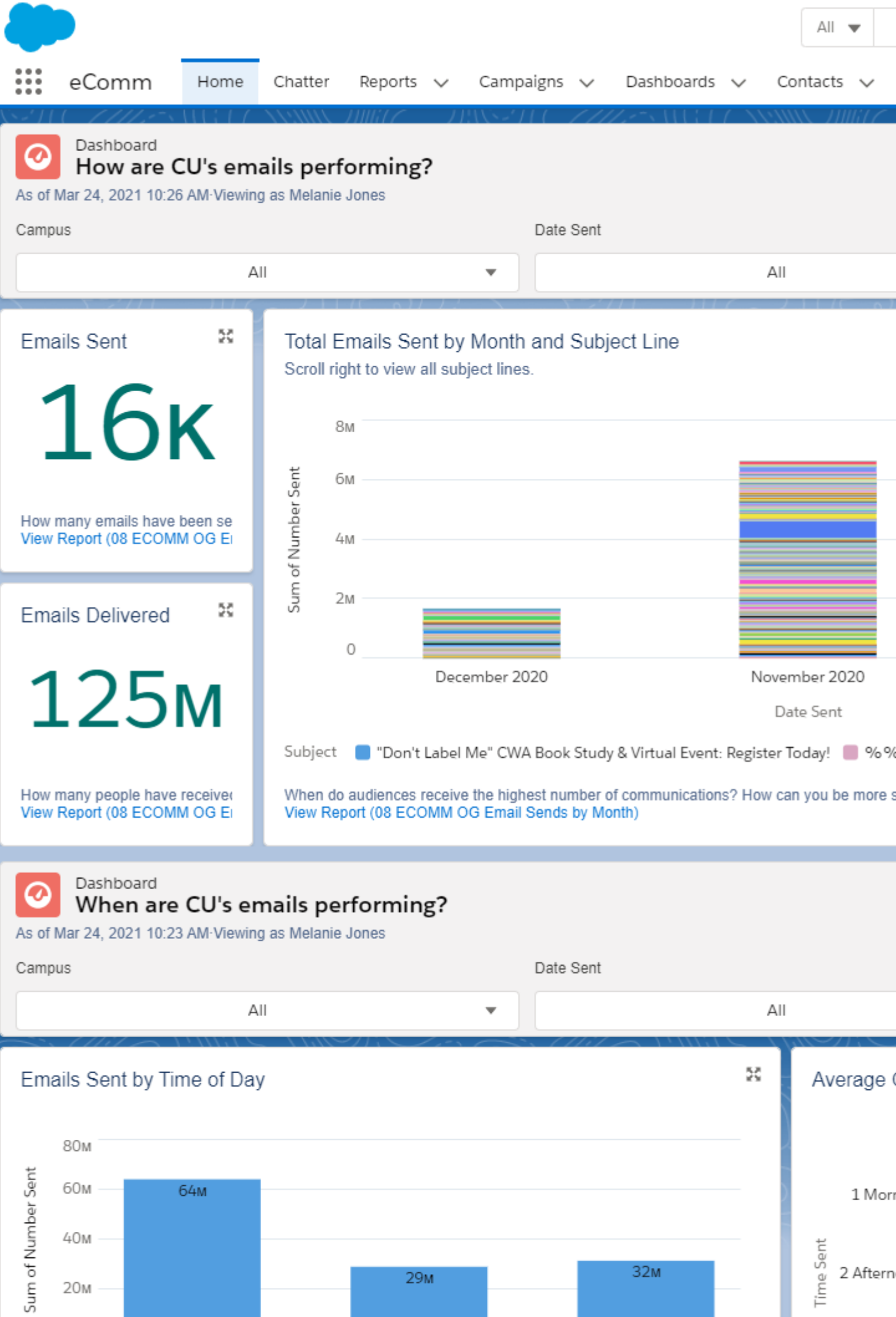
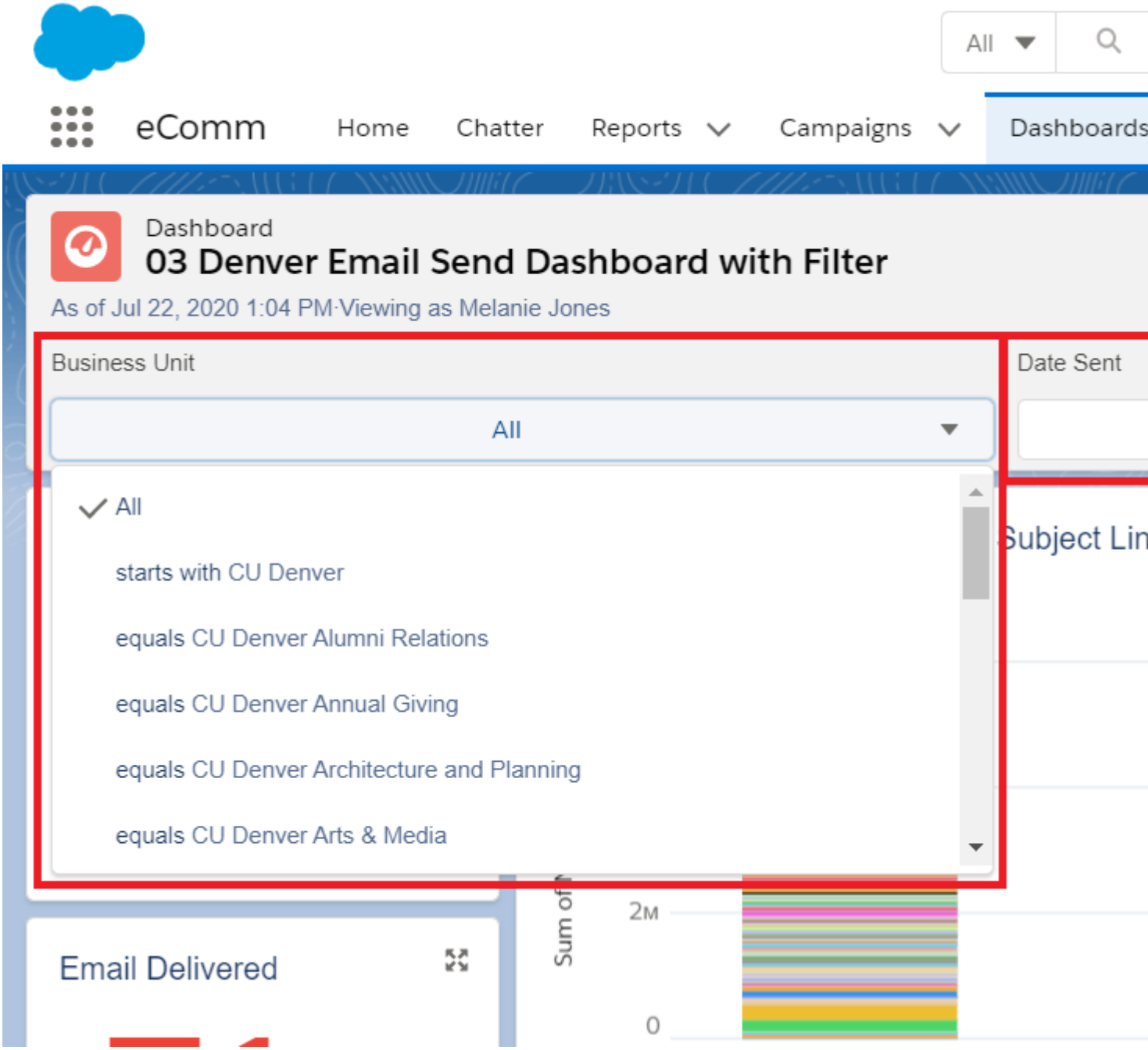
    - Available Business Unit Dashboards are broken down by the question it will help you address. Current options include:
        - *How* are emails performing?
        - *When* are emails performing?
- Select your campus Dashboard


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 E
Emails Delivered
125M
How many people have receive
View Report (08 ECOMM OG E
Total Emails Sent by Month and Subject Line
Scroll right to view all subject lines.
Sum of Number Sent
8M
6M
4M
2M
0
December 2020
November 2020
Date Sent
Subject
"Don't Label Me" CWA Book Study & Virtual Event: Register Today!
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
Sum of Number Sent
80M
60M
40M
20M
64M
29M
32M
Average
Time Sent
1 Morr
2 Aftern

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

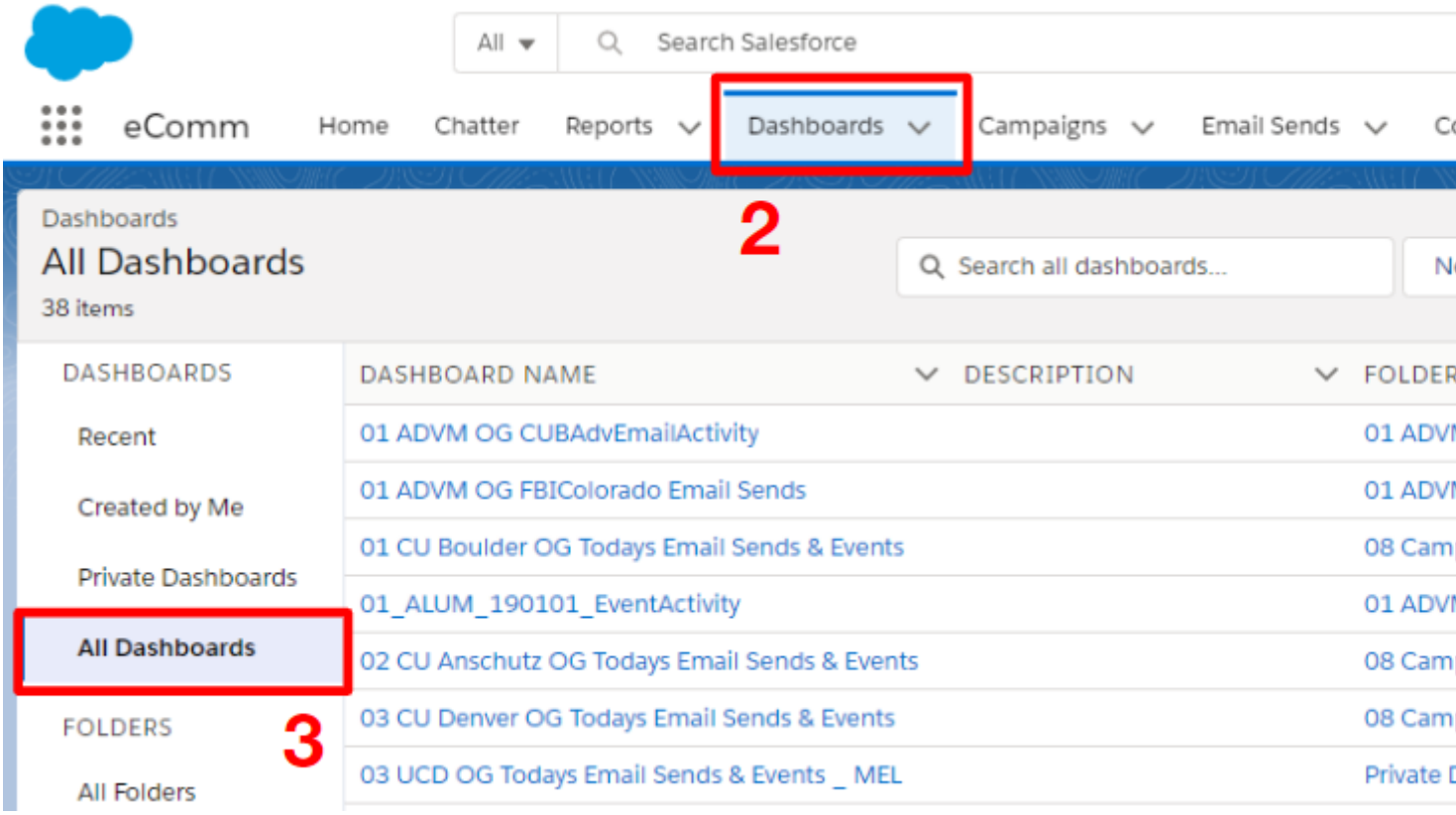


Don't see any data? It may be due to having multiple filters applied that do not make sense. If you continue to not see any data, contact your eComm specialist.

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

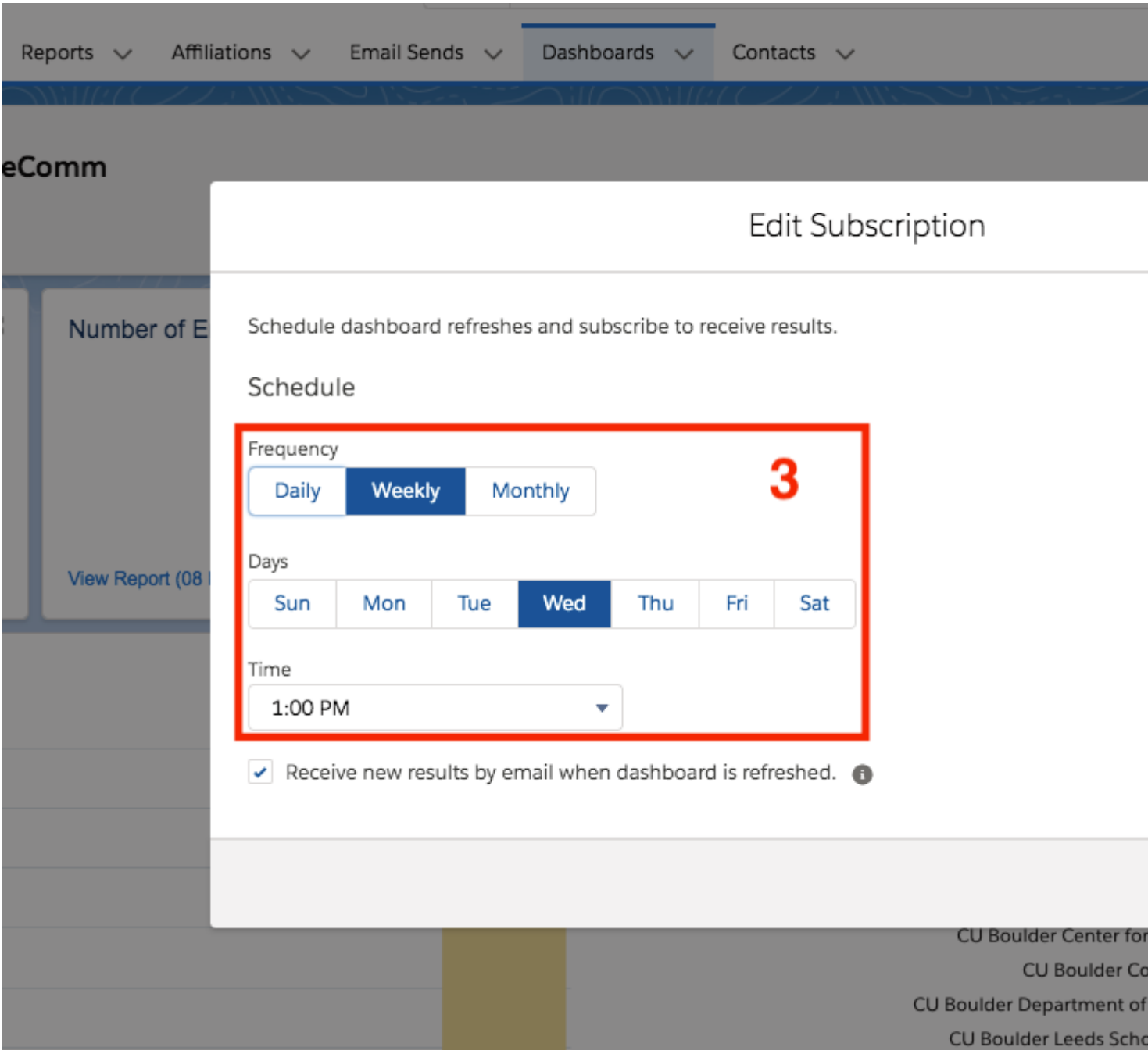


REFRESH Once your Dashboard is open, you might need to click *Refresh* in the top right corner to get the most up-to-date data.

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:
    - **Frequency:** Daily/Weekly/Monthly
    - **Day(s):** Any day of the week
    - **Time:** Any time of day, on the hour
4. Click the blue **Save** button in the bottom right of the pop-up



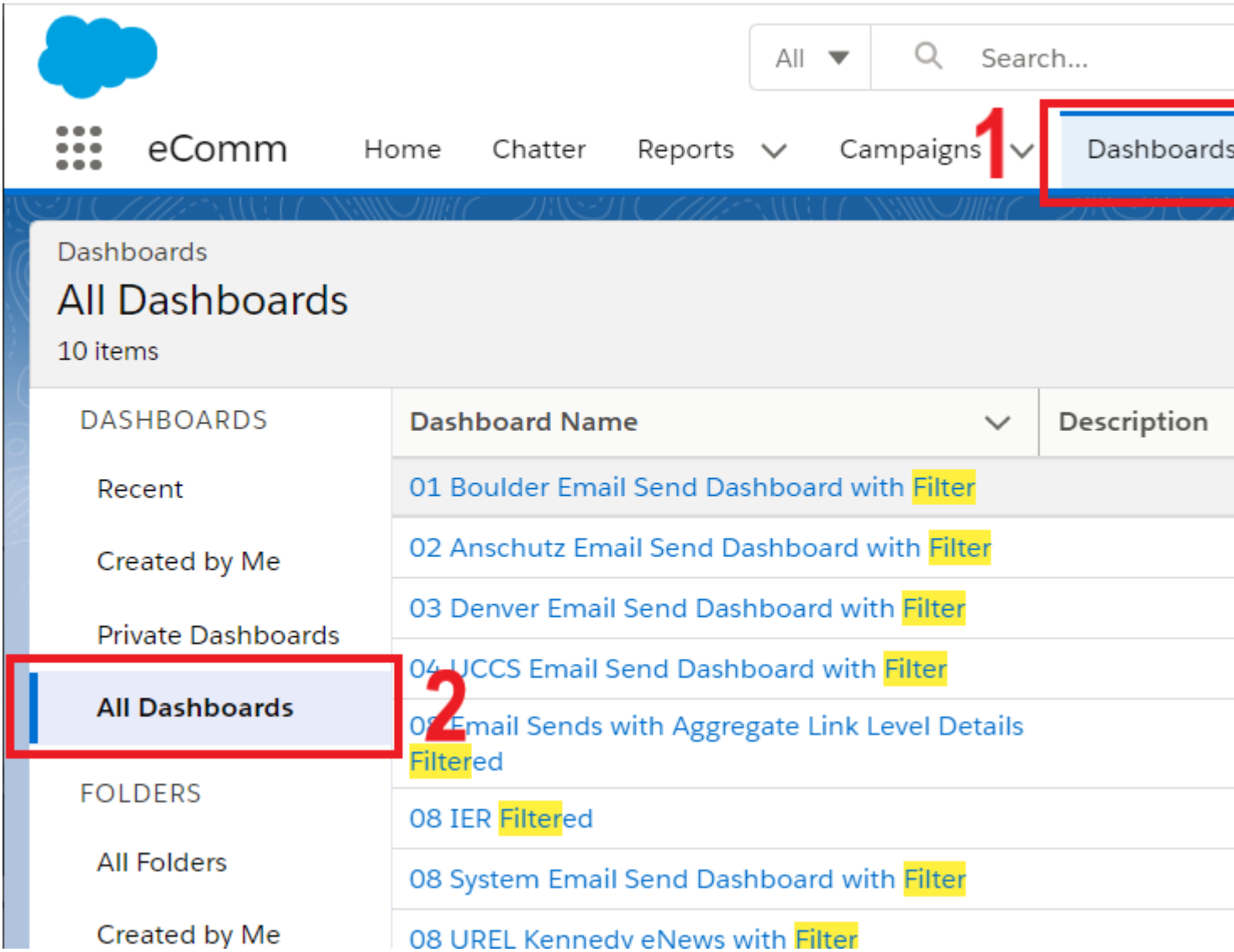
LIMITATION Only active Salesforce users can be subscribed to Salesforce Dashboards. The subscription email contains all visual components of the Dashboard without any filters applied. In other words, the email will not display filtered data as viewed in Salesforce.

Favorite Dashboards

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

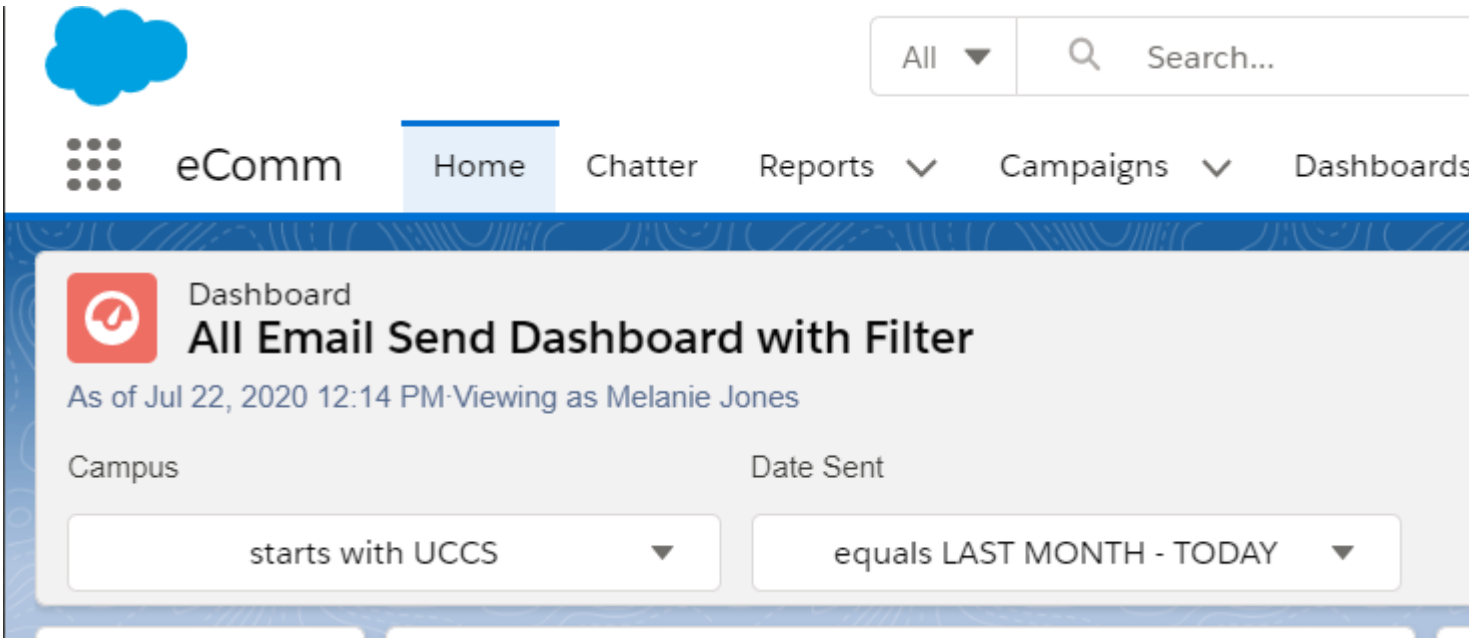
- Login to Salesforce
- Click **Dashboards** in the top navigation
- Select **All Dashboards** listed down the left
- Search for the name of the Dashboard (in this example, 'filter')

- 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.

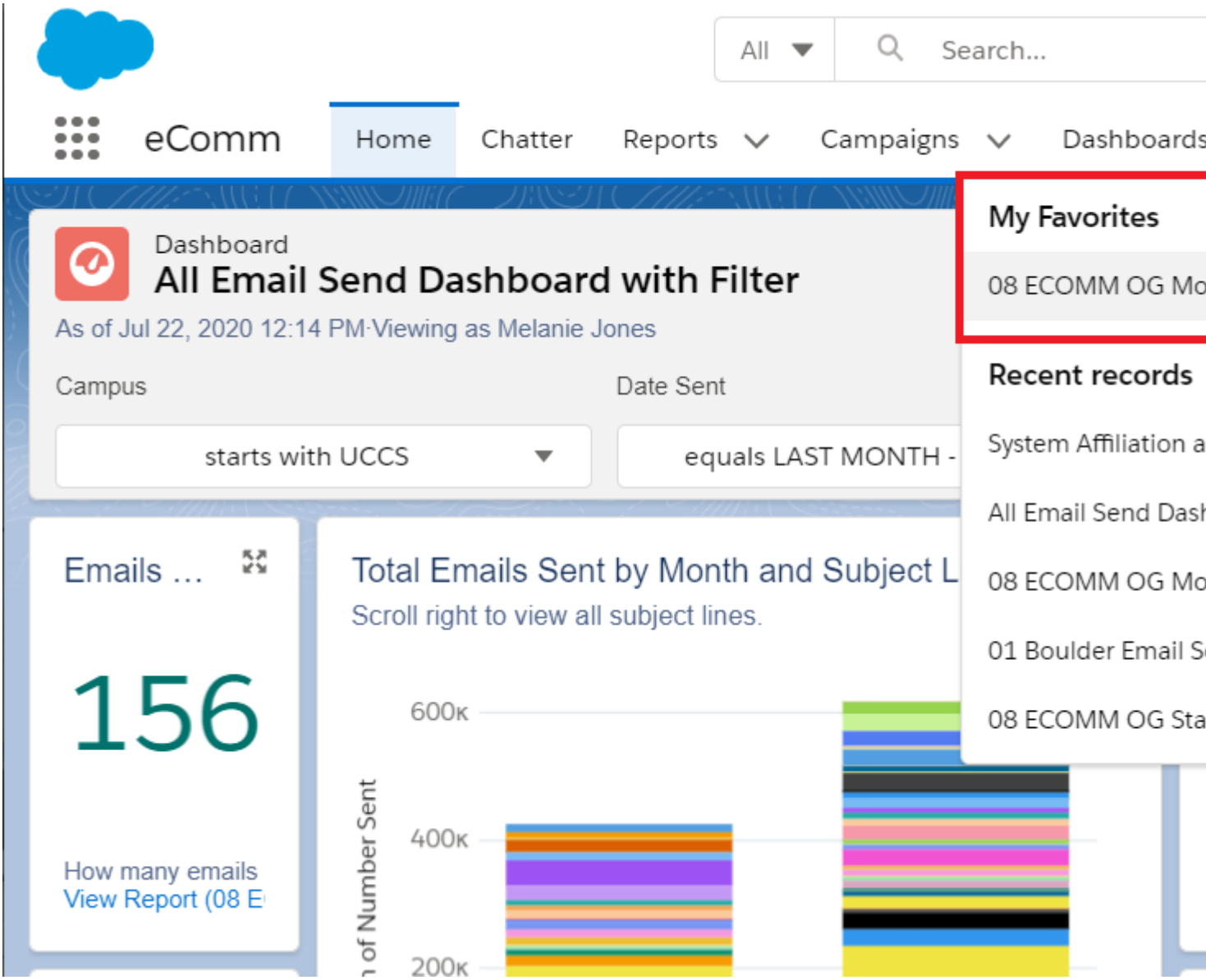


Now you can easily navigate to your favorites in two different ways:

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



- 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

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[12] (for eComm specialists only)

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