

Salesforce Reporting ^[1]

January 15, 2019 by [Melanie Jones](#) ^[2]

NOTE This task requires assistance from your [eComm Specialist](#) ^[3].

Learn all about Reports and Dashboards with [Salesforce Lightning](#) ^[4]. You can build real-time charts to visualize key metrics such as email engagement and event attendance, although eComm primarily uses them to create audience Reports for communications sent through Marketing Cloud.

[Changes to Reporting](#) ^[5] [Data Dictionary](#) ^[6]

[Commercial Reporting How-To](#) ^[7] [Commercial Naming Conventions](#) ^[8] [Commercial Inclusion Criteria Visualized](#) ^[9]

[Transactional Reporting How-To](#) ^[10] [Transactional Naming Conventions](#) ^[11]

Templates

- [Audience](#)
- [Engagement](#)
- [Administrative](#)

Affiliates

- [Donors](#) ^[12]
 - [Donors in a Geographic Area](#)
- [Parents](#) ^[13]
 - [Current Parents](#) ^[14]
 - [Past Parents](#) ^[15]
- [Friends](#) ^[16]
- [Confirmed/Admitted Students](#) ^[17]

Alumni

- [Degreed Alumni NOT Current Student](#) ^[18]
 - [Degreed Alumni NOT Current Student in Geographic Area](#)

- Alumni who Walked on Campus and NOT Current Student [19]
 - Alumni who Walked on Campus and NOT Current Student in a Geographic Area

Campaign

- Campaign [20]

TIP Once on the Details tab of a Campaign, scroll down and select the custom link 'Campaign Report Upload for MC'. This converts the Campaign to a Report, where you simply modify the criteria to reflect the correct preference category.

Employees

- Active Employees [21]
 - Staff [22]
 - Faculty [23]
 - Student Employees [24]
- Retired Employees [25]
- Executive Leadership

Interests

- CU Advocates [26]

Students

- Enrolled Students [27]
 - Enrolled Students in Geographic Area
- CSU/UNC Students [28]
- Non-Degree Seeking Students [29]

Unsubscribed

- Category Opt-out [30]
- Overall & Category Opt-Out [31]

How did a single email perform?

REPORT TYPE | Email Send

DESCRIPTION |

EXAMPLE | <https://cu.my.salesforce.com/00O1J000006HeoX> [32]

Insead view the single email send for full analytics:

<https://cu.my.salesforce.com/a20o00000014evt>

How many emails has a recurring communication delivered to over time?

REPORT TYPE | Email Send

DESCRIPTION |

EXAMPLE | <https://cu.my.salesforce.com/00O1J000006Hewl> [34]

How is my recurring email performing over time?

REPORT TYPE | Email Send

DESCRIPTION |

EXAMPLE | <https://cu.my.salesforce.com/00O1J000006Heo3> [35]

Who is participating in my event?

REPORT TYPE | Campaign

DESCRIPTION |

EXAMPLE | <https://cu.my.salesforce.com/00O1J000006Heom> [36]

Who didn't open yesterday's email from Marketing Cloud?

REPORT TYPE | IER

DESCRIPTION |

EXAMPLE | <https://cu.my.salesforce.com/00O1J000006Hewg> [37]

Who didn't open any Marketing Cloud emails in 6 months?

REPORT TYPE | IER

DESCRIPTION |

EXAMPLE | Column E Link

What is the affiliation breakdown for people attending my events?

REPORT TYPE | Affiliation, cross-filter campaigns

DESCRIPTION |

EXAMPLE |

Naming conventions or parent/child campaigns are necessary when looking across multiple events

Who attended one of my events?

REPORT TYPE | Campaign

DESCRIPTION |

EXAMPLE |

Note: Naming conventions will become key here.

Who attended 2+ events?

REPORT TYPE | Custom Report
DESCRIPTION |
EXAMPLE | Not possible today - request backlogged

What Salesforce reports have MECs created since launch?

REPORT TYPE | Reports
DESCRIPTION |
EXAMPLE | <https://cu.my.salesforce.com/00O1J000006He9I> [38]

Did my user send an email without an UNSUB?

REPORT TYPE | Email Send
DESCRIPTION |
EXAMPLE | <https://cu.my.salesforce.com/00O1J000006Hewq> [39]

Important Note

- There isn't a field within Email Sends to determine if an email is commercial or transactional in nature. This means the 'Exclusion Report' might be blank although CAN-SPAM was NOT violated.
- There isn't a field within Email Sends to determine if a Data Extension was used as an Exclusion. This means if a user emails University Email Addresses with Data Extensions, you can NOT report on their included and excluded data extensions.

Who is uploading contacts to Salesforce?

REPORT TYPE | Contacts & Accounts
DESCRIPTION |
EXAMPLE | <https://cu.my.salesforce.com/00O1J000006He9g> [40]

LEARN WITH TRAILHEAD [41]

- [Reports & Dashboards for Lightning Experience](#) [42] | **2 Hours**
- [Lightning Experience for Salesforce Classic Users](#) [43] | **1 Hour**
- [Lightning Experience Basics](#) [44] | **1 Hour**
- [Lightning Experience Productivity](#) [45] | **1 Hour**

Related Content

- [What is the difference between a campaign and a report?](#) [46]
- [Why do reports have such complicated names?](#) [47]
- [How do I request a new report?](#) [48]
- [How do I modify an existing report?](#) [1]
- [What data can I use to build audience reports?](#) [49]
- [How do I view a report?](#) [50]
- [How do I share a report with another user?](#) [51]

Display Title:

Salesforce Reporting

Send email when Published:

No

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

Links

[1] <https://www.cu.edu/blog/ecommerce-wiki/salesforce-reporting>

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

[3] <https://www.cu.edu/ecommerce/strategy/leadership>

[4] <https://cuecommerce.my.salesforce.com>

[5] <https://docs.google.com/document/d/16jGlwb6pXPXU-6pUnwwQm0Hj0ThbLfFHE3XEFVefj6Q/edit?usp=sharing>

[6]

<https://docs.google.com/spreadsheets/d/1s0qta2ap5xllM5xQOZ9e4Yc3lWBdbCOWA2z4OhFGGMg/edit?usp=sharing>

[7] <https://docs.google.com/document/d/15FT1mvXnltMnm1Hn3MRielSW-9uSTLd7Ebgj3UPdTKs/edit?usp=sharing>

[8]

https://docs.google.com/document/d/1DJjvDc6iJB01fLnU_vLZmEfHXL2fFmvdkar53T_7Ops/edit?usp=sharing

[9]

<https://docs.google.com/document/d/177E3iDZnBh4qLNmcvOt1ADLuRSLvuTGdqZVBpsy0DVI/edit?usp=sharing>

[10] <https://docs.google.com/document/d/1aYCwjPRQM-NujQubUjHC9rSntjdD9v7sW7X3rTuTJPY/edit?usp=sharing>

[11] https://docs.google.com/document/d/1xV5wML9jk-VY-YTnrvZwSvYY6gByFfo_NO-lq1qm-ws/edit?usp=sharing

[12] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpbcEAA/edit>

[13] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpQtEAI/edit>

[14] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpZWEAY/edit>

[15] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpZREAY/edit>

[16] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpR3EAI/edit>

[17] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpIIEAQ/edit>

[18] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpbNEAQ/edit>

[19] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007tBq7EAE/edit>

[20] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpRIEAY/edit>

[21] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007tBXPEA2/edit>

[22] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpaKEAQ/edit>

[23] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpaFEAQ/edit>

[24] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpaUEAQ/edit>

[25] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpaeEAA/edit>

[26] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpkeEAA/edit>

[27] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007tBq2EAE/edit>

[28] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpb8EAA/edit>

[29] <https://cuecommerce.lightning.force.com/lightning/r/Report/00Of4000007gpsyEAA/edit>

- [30] <https://cuecomm.lightning.force.com/lightning/r/Report/00Of4000007gpk0EAA/edit>
- [31] <https://cuecomm.lightning.force.com/lightning/r/Report/00Of4000007gpktEAA/edit>
- [32] <https://cu.my.salesforce.com/00O1J000006HeoX>
- [33] <https://cu.my.salesforce.com/a20o00000014evt>
- [34] <https://cu.my.salesforce.com/00O1J000006Hewl>
- [35] <https://cu.my.salesforce.com/00O1J000006Heo3>
- [36] <https://cu.my.salesforce.com/00O1J000006Heom>
- [37] <https://cu.my.salesforce.com/00O1J000006Hewg>
- [38] <https://cu.my.salesforce.com/00O1J000006He9l>
- [39] <https://cu.my.salesforce.com/00O1J000006Hewq>
- [40] <https://cu.my.salesforce.com/00O1J000006He9g>
- [41] https://trailhead.salesforce.com/en/modules/reports_dashboards
- [42] https://trailhead.salesforce.com/en/content/learn/modules/lex_implementation_reports_dashboards
- [43] <https://trailhead.salesforce.com/content/learn/modules/lightning-experience-for-salesforce-classic-users>
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- [45] <https://trailhead.salesforce.com/content/learn/modules/lightning-experience-productivity>
- [46] <https://www.cu.edu/blog/ecommerce/wiki/salesforce-campaign-vs-salesforce-report>
- [47] <https://www.cu.edu/blog/ecommerce/wiki/naming-conventions>
- [48] <https://www.cu.edu/blog/ecommerce/wiki/add-account>
- [49] <https://www.cu.edu/blog/ecommerce/wiki/using-data-build-your-audience>
- [50] <https://www.youtube.com/watch?v=OdYhw7qa3oM&feature=youtu.be>
- [51] <https://www.cu.edu/blog/ecommerce/wiki/salesforce-visibility-and-sharing>