

Data Cloud Report Package for Marketing Cloud

SETUP AND USAGE DOCUMENTATION FOR APPEXCHANGE PACKAGE

Prerequisites

- CRM license required
- Configure Data Cloud permissions
 - Assign the correct permission sets to integrate with Marketing Cloud Engagement.
 - Add the Starter Bundle.
- Set up a Marketing Cloud Connection in Data Cloud
 - Configure the connector after Intelligence Reports are enabled on Marketing Cloud Hyperforce.
 - Refer to the connector [Documentation](#)
- Install the Starter Bundle for Email channel
 - During setup, select all existing business units.
 - Data provisioning may take up to 24 hours once bundles are configured.
 - Refer to bundle [Documentation](#)
- Download the Report Package and access the reports in report folder “Data Cloud Report Installed”.
- Create and map a custom field “Is Unique”
 - The purpose of this step is to include and map the “Is Unique” field for email open and email click engagement data.
 - Find and click the data stream with the name starts with “SFMC Email Engagement Open”
 - Under the “Data Mapping” panel on the right hand side, click the Review button
 - The next mapping page shows how attributes from the Data Lake Object (DLO) “SFMC Email Engagement Open” to the Data Model Object (DMO) “Email Engagement”. The “Is Unique” field from “SFMC Email Engagement Open” is not mapped by default.
 - On the right hand side object “Email Engagement”, scroll down and click the arrow next to unmapped fields. Click the “Add New Field” option right under the “Unmapped(xxx)” title
 - For the new field, set the name to **Is Unique** under “Field Label”. The “Field API Name” will be automatically populated. Select Text as the Data Type. Click Save button
 - After the new field “Is Unique” is created, under the “SFMC Email Engagement Open” field mapping page, map the “Is Unique” field of DLO “SFMC Email Engagement Open” to the newly created “Is Unique” field under DMO “Email Engagement”. Save the page mapping
 - Go back to the Data Stream list page, find and click the data stream with the name starts with “SFMC Email Engagement Click”.
 - In the next page, click the “Review” button on the right hand side under “Data Mapping” section
 - Map the “Is Unique” field of “SFMC Email Engagement Click” to the “Is Unique” field of “Email Engagement” (this field was already created from the previous step). Save the page mapping

Reports Included in Package

1. EMAIL SEND REPORT (SALESFORCE DATA CLOUD)

Overview

The Email Send Report provides a consolidated summary of all email sends and engagement activities. It helps marketers track key performance metrics such as sends, opens, clicks, bounces, and unsubscribes.

In Salesforce Data Cloud, this report can be created using the “Email Template with Email Engagement” report type to display both email details and engagement insights. This format provides a high-level view of performance metrics by email, with actions categorised side-by-side for easy comparison.

Report name after installation: Email Engagement Breakdown Report

Report Filters

These filters are preconfigured in the report. Report users can change the filter values while running the report, but they cannot add new filters.

1. Email Template > Name

- Purpose: Ensures only emails with a name are included.
- Customer Usage: Can filter to a specific email name if needed.

2. Email Engagement > Internal Organisation

- Condition: Internal Organisation not equal to ""
- Purpose: Specify Marketing Cloud Engagement business unit ID in reports.
- Customer Usage: Can filter by a specific Marketing Cloud Engagement business unit ID value when needed.

3. Email Engagement > Engagement Date Time

- Purpose: Limits report to recent engagement activity (last 30 days be default).
- Customer Usage: Can update this filter to select a custom date range, such as past X months/weeks/days.
- Reference: [Relative Date Filters in Salesforce](#)

Example Report Filter Use Cases

- Monthly Performance Tracking → Filter by Engagement Date greater or equal to "LAST 1 MONTH"
- Specific Email Campaign → Filter by Email Template Name = "Summer Promo August 2025"
- Business Unit Analysis → Filter by Internal Organisation = Specific MID

Main Report Fields:

Data Attributes	Data Type	Comments
Internal Organization	Number	Marketing Cloud business unit MID. Report uses this value to group rows.
Name	Text	Email name. Report uses this value to group rows.
Event Month	Text	Formular field. The month/year value of the engagement action. Report uses this value to group columns.
Send	Number	The total number of email send of a particular email per month
Open	Number	The total number of email open of a particular email per month
Click	Number	The total number of email click of a particular email per month
Bounce	Number	The total number of email bounce of a particular email per month
Opt Out	Number	The total number of email unsubscribe of a particular email per month

2. Email Performance Report

A summary of an Email Send Report in Salesforce Marketing Cloud typically includes key performance metrics and insights for all sends.

To create a report in data cloud, use Email Engagement and Email Template Report type to get Email details and the relevant engagement rates.

To get a summary, group rows by EmailTemplate.Name and columns by Engagement Channel Action.

Customer can filter based on Email send Month/Email name (Basic instructions can be provided)

Report Filter

- **Note:**
 - The purpose of the below filters is to enable customers to apply/change filters when they run the report. They can modify these filter conditions but they can't add new filters to the report.
 - These filters can be applied to all reports
- Email Template > Name **not equal to** ""
 - By default, this filter means email name is not empty
 - Customer can use this filter to search for a particular email name.
- Email Engagement > Internal Organization **not equal to** ""
 - This field "Internal Organization" has the value of SFMC MID
 - By default this report will display tracking from all SFMC MID
 - Customer can change this filter when running the report to filter a particular SFMC MID.
- Email Engagement > Engagement Date Time
 - Engagement Date Time is used in the filter twice - the purpose is when customer runs this report, they can set engagement date time between a time period, e.g. from 01 Aug 2025 to 30 Aug 2025
 - Default filter value:
 - 1) Engagement Date Time **greater or equal to** LAST 6 MONTHS
 - 2) Engagement Date Time **not equal to** ""
 - Customer can also update this date filter to check email tracking data for the past X months/weeks/days
 - Reference to relative date filter https://help.salesforce.com/s/articleView?id=analytics.filter_dates_relative.htm&type=5

Data Attribute (MCI)	Data Attribute (DC)
Email Name	EmailTemplate.Name
Business Unit	EmailEngagement.Internal Organisation
Email Total Unique Clicks	Count by Column EmailEngagement.Engagement Channel Action is Click and Is Unique is True

3. EMAIL BOUNCE SUMMARY REPORT (SALESFORCE DATA CLOUD)

The Email Bounce Summary Report provides visibility into bounced emails from campaigns and automations. It helps marketers analyse deliverability issues and take corrective actions to improve email performance.

In Salesforce Data Cloud, this report can be created using the “Email Template with Email Engagement” report type to show email details along with bounce-specific engagement metrics. This report summarises bounce counts per email template, helping identify email domains with higher bounce rates.

Report name after installation: Email Bounce Summary Report

Report Filters

These filters are preconfigured in the report. Customers can change the filter values while running the report, but they cannot add new filters.

1. Engagement Channel Action (Mandatory Filter)

- Condition: Engagement Channel Action = "Bounce"
- Purpose: Ensures that only bounce-related records are included in the report.

2. Email Engagement > Internal Organisation

- Condition: Internal Organisation not equal to ""
- Purpose: Specify Marketing Cloud Engagement business unit ID in reports.
- Customer Usage: Can filter by a specific Marketing Cloud Engagement business unit ID value when needed.

3. Email Engagement > Engagement Date Time

- Purpose: Limits report to bounce activity within a recent period (last 30 days be default).
- Customer Usage: Can adjust to a custom time period (e.g., last 30 days, last 3 months).
- Reference: [Relative Date Filters in Salesforce](#)

Example Use Cases

- Identify Deliverability Issues → View bounces for a specific email send or bounced email domain.
- Monitor Trends → Compare bounce counts month-over-month by adjusting report filter.

Main Report Fields:

Data Attributes	Data Type	Comments
Name	Text	Email name. Report uses this value to group rows.
Email Domain Name	Text	The subset of email address that represents domain after @ sign. Report uses this value to group rows.
Hard/Soft/Block etc	Text	Type of bounce. Each bounce type has the count of that bounce type for a particular email send of a particular email domain such as outlook.

4. EMAIL DOMAIN PERFORMANCE REPORT (SALESFORCE DATA CLOUD)

The Email Domain Performance Report provides visibility into email performance such as send/open/click/bounce counts based on end user's email domains. It helps marketers get insights of email performance across different email domains. In Salesforce Data Cloud, this report can be created using the "Email Engagement" report types. This report summarises send/open/click/bounce counts per email domain, helping identify email domains performance.

Report name after installation: Email Domain Performance Report

Report Filters

These filters are preconfigured in the report. Customers can change the filter values while running the report, but they cannot add new filters.

1. Email Engagement > Internal Organisation

- Condition: Internal Organisation not equal to ""
- Purpose: Specify Marketing Cloud Engagement business unit ID in reports.
- Customer Usage: Can filter by a specific Marketing Cloud Engagement business unit ID value when needed.

2. Email Engagement > Engagement Date Time

- Purpose: Limits report to recent engagement activity (last 30 days be default).
- Customer Usage: Can update this filter to select a custom date range, such as past X months/weeks/days.
- Reference: [Relative Date Filters in Salesforce](#)

Example Use Cases

- Identify Email Performance Per Domain → View open/click/bounce counts for a specific email domain.
- Monitor Trends → Compare email open/click counts across email domains month-over-month by adjusting report filter.

Main Report Fields:

Data Attributes	Data Type	Comments
Email Domain Name	Text	The subset of email address that represents domain after @ sign. Such as outlook.com . Report uses this value to group rows.
Send	Number	Send Count
Open	Number	Open Count
Click	Number	Click Count
Bounce	Number	Bounce Count
Opt Out	Number	Opt Out Count

5. EMAIL SPAM COMPLAINT REPORT (SALESFORCE DATA CLOUD)

The Email Spam Complaint Report provides visibility into email sends that attract subscriber complaints (report email as spam with in inbox). It helps marketers get insights of which email sends/campaigns attracts end user (subscribers) who report spam of that email that was sent to them. In Salesforce Data Cloud, this report can be created using the “Email Template with Email Engagement” report types This report summarises the complaints(report spam) counts per email send, grouped by email domain, helping identify email domains performance.

Report name after installation: Email Spam Complaint Report

Report Filters

These filters are preconfigured in the report. Customers can change the filter values while running the report, but they cannot add new filters.

1. Engagement Channel Action (Mandatory Filter)

- Condition: Engagement Channel Action = "**Complaint**"
- Purpose: Ensures that only bounce-related records are included in the report.

2. Email Engagement > Internal Organisation

- Condition: Internal Organisation not equal to ""
- Purpose: Specify Marketing Cloud Engagement business unit ID in reports.
- Customer Usage: Can filter by a specific Marketing Cloud Engagement business unit ID value when needed.

3. Email Engagement > Engagement Date Time

- Purpose: Limits report to complaint activity within a recent period (last 30 days be default).
- Customer Usage: Can adjust to a custom time period (e.g., last 30 days, last 3 months).
- Reference: [Relative Date Filters in Salesforce](#)

Example Use Cases

- Identify Email Performance Per Domain → View complaints data for a specific email domain.
- Monitor Trends → Compare complaints records across email domains month-over-month by adjusting report filter.

Main Report Fields:

Data Attributes	Data Type	Comments
Name	Text	Email name. Report uses this value to group rows.
Email Domain Name	Text	The subset of email address that represents domain after @ sign. Report uses this value to group rows.
Record Count	Text	Complaints count from a particular email send of a particular email domain such as outlook.