Salesforce Marketing Analytics

Administrator Guide

Package Version 1.0

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Introduction

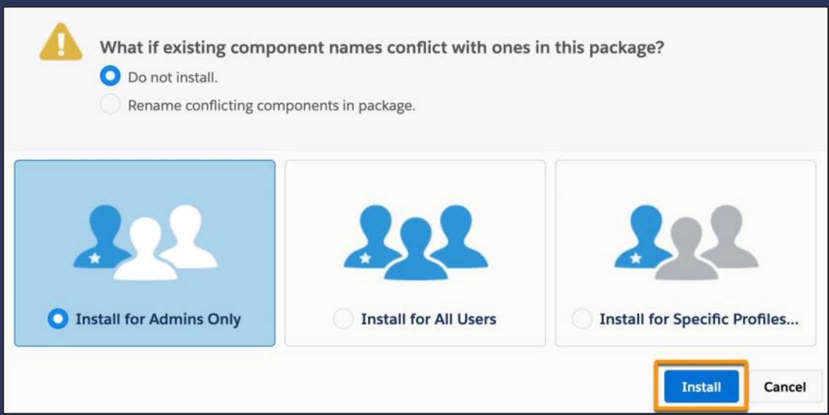
The Salesforce Marketing Analytics package provides a starting point for reporting on your Salesforce campaign performance, providing key financial and campaign reach metrics with pre-built reports and a dashboard. Following installation, all items are fully configurable and can be customised to suit your business needs.

Installing the Application

1. Click the 'Get It Now' button on the AppExchange listing

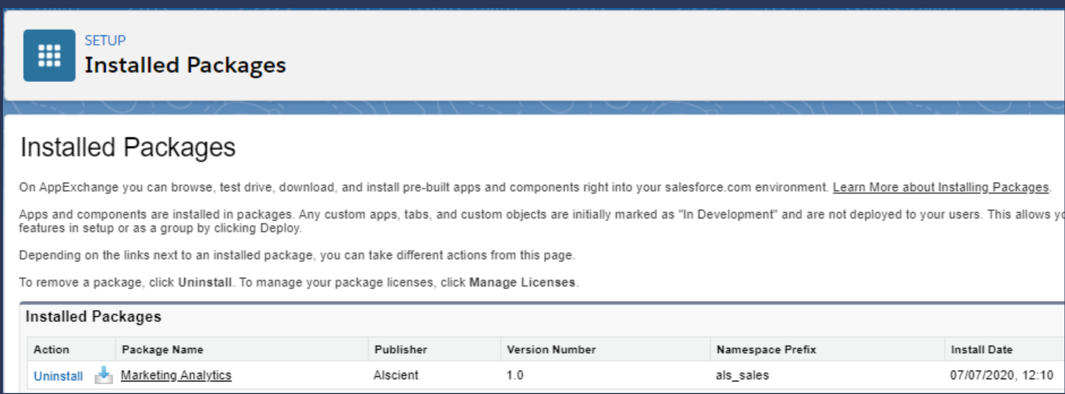
2. Log into the Salesforce account you wish to install the package in

3. Choose who you would like to install the package for. If you choose to install the package for admins only, you will be able to grant other users access to the reports and dashboard later.



4. Wait to receive an email confirming that the package has been successfully installed

5. Verify that the package has been correctly installed by navigating to Setup -> Installed Packages



For more information, see [Installing Packages].

Accessing the Dashboard

1. Navigate to the dashboards tab -> All Folders -> Marketing Analytics Dashboards

2. Click the drop-down arrow to the right of the folder and click Share to choose which users, roles and public groups you would like to be able to view/edit the dashboard

3. Click on the folder name to open it, then click Campaign Metrics Dashboard to open the dashboard

For more information, see Share a Report or Dashboard Folder in Lightning Experience.

Understanding the Dashboard Metrics

Unless any filters are applied, the dashboard will display data from all campaign records in Salesforce. The figures displayed in each dashboard component are explained below:

% Revenue Target Achieved – the sum of the amounts of the won opportunities related to the campaigns, divided by the sum of the expected revenue campaign fields

Campaign Actual Revenue against Expected Revenue – the sum of the amounts of the won opportunities related to each campaign, shown alongside that campaign's expected revenue field

Expected Revenue – the sum of the expected revenue campaign fields

Actual Revenue – the sum of the amounts of the won opportunities related to the campaigns

Campaign Actual ROI (%) against Expected ROI (%) – the actual ROI column is the difference between the won opportunity amounts and the actual cost campaign field, divided by the actual cost campaign field. The expected ROI column is the difference between the expected revenue campaign field and the budgeted cost campaign field, divided by the budgeted cost campaign field.

Number of Opportunities – the number of opportunities related to campaigns

Number of Won Opportunities – the number of opportunities with a 'Closed Won' stage related to campaigns

Number of Opportunities Associated with Campaign – the number of opportunities shown alongside the number of opportunities with a 'Closed Won' stage related to each campaign

Cumulative Campaign Members – the total number of campaign members each campaign has, broken down by the date they were first added to the campaign

Campaign Members – the total number of campaign members

Campaign Responses – the total number of campaign members with a member status that is classed as a response

Cumulative Campaign Responses - the total number of campaign members with a member status that is classed as a response each campaign has, broken down by the date their status was first changed to a response

Lead Campaign Members – the total number of campaign members that are leads

Contact Campaign Members – the total number of campaign members that are contacts

Campaign Members by Status – the total number of campaign members broken down by their member status

Campaign Members by Campaign and Member Status – the total number of campaign members for each campaign broken down by their member status

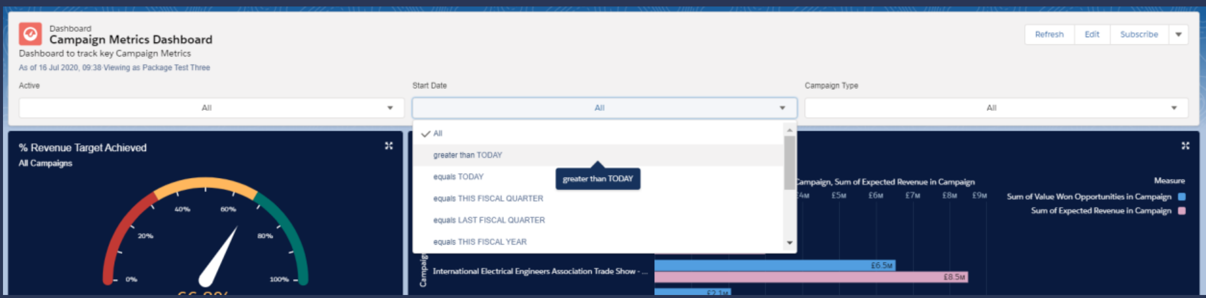
Overall Response Rate (%) – the total number of campaign members broken down by whether they have a member status which is classed as a campaign response

Response Rate (%) against Expected Response Rate (%) by Campaign – response rate (%) is the number of campaign members with a member status that is classed as a campaign response divided by the total number of campaign members for each campaign. The expected response (%) is the expected response campaign field for that campaign.

Filtering the Dashboard

1. Click on the filter drop-down menu you wish to use

2. Select your chosen option



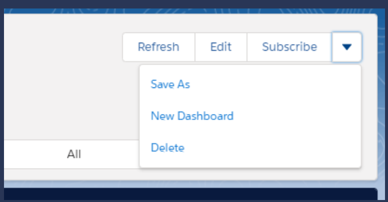
3. Click outside of the filter box and the dashboard will automatically update to only include information which meets the filter criteria

For more information, see [Apply a Dashboard Filter].

Customising the Dashboard

1. To edit the existing dashboard, click the Edit button in the top right

2. To clone the dashboard and alter a copy of it click the drop-down arrow -> Save As, name the cloned dashboard and click the Edit button once it has been created



3. You will now be in the dashboard editor where you are free to add, remove, edit and move any dashboard components or filters

For more information, see [Build a Lightning Experience Dashboard].

Accessing the Reports

1. Navigate to the reports tab -> All Folders -> Campaign Reports

2. Click the drop-down arrow to the right of the folder and click Share to choose which users, roles and public groups you would like to be able to view/edit the reports

3. Click on the folder name to open it, then click on a specific report name to access that report

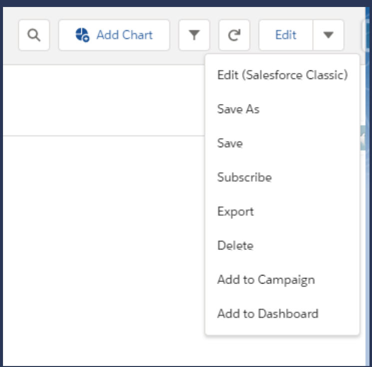
4. You can also access a report directly from the dashboard, by clicking the View Report hyperlink at the base of a component

For more information, see [Share a Report or Dashboard Folder in Lightning Experience](#).

Customising the Reports

1. To edit an existing report, click the Edit button in the top right

2. To clone the report and alter a copy of it click the drop-down arrow -> Save As, name the cloned dashboard and click Edit once it has been created



3. You will now be in the report builder, where you are free to customise the report

For more information, see [Build a Report in Lightning Experience](#).

Working in Salesforce Classic

It is possible to view the dashboard, view the reports and customise the reports in Salesforce Classic. Navigate to the relevant reports or dashboard using the tabs and folder structures. However, it is not possible to edit the dashboard in Salesforce Classic so you will need to switch to Lightning Experience to do so.

For more information about switching between Salesforce Lightning and Salesforce Classic, see Toggle or Switch between Lightning Experience and Salesforce Classic.

For more information about editing reports in Salesforce Classic, see Build a Report in Salesforce Classic.