Reporting Dashboards in Salesforce

Learn how to set up dashboards below.

What's in this article?

Open and Click Report

1. Select the **Tasks and Events** record type.

2. Define the report parameters based on your desired time frame and hierarchy structure.

3. Add a filter to remove internal emails logged to Salesforce (e.g. Company/Account not equal to Marketo).

4. Select the **Summary** report format.

5. Add the Subject, Assigned, and Marketo Sales Clicked/Marketo Sales Viewed fields to the report.

6. Double-click on **Add Formula** within the Fields pane.

7. Add a name to the formula, select **Percent** in the format, and select **Grouping 1*.***

8. Select **Marketo Sales Clicked/Marketo Sales Viewed,** then **Sum** in the Summary Fields.

9. Add a divide sign to the formula, and then select **Record Count** in the Summary fields – *Save As*.

Template Performance Report

1. Customize the Open and Click report to include the following fields – *Save As.*

Template Volume Report

1. Modify the Template Performance Report and include the filter, "Marketo Sales Template not equal to blank."

2. Remove the Marketo Sales Clicked field – *Save As*.

Trending Accounts Report

1. Select **Activities with Accounts** record type.

2. Setup the report parameters and fields as indicated below – *Save As.*