

# SALES ENGAGE FOR SALESFORCE: REPORTS & DASHBOARDS

Using fields installed as a part of our package you can create reports & dashboards to

- 1) Enrich the insights into the organization for management
- 2) Enhance the views into prospects and pipeline for Sales Reps
- 3) Surface activity levels of each team member to drive productivity

- Reports are built around standard Salesforce objects, report types and Sales Engage Custom Fields
- The dashboard and reports will populate with data once the team starts using Sales Engage

## SALES ENGAGE CUSTOM SALESFORCE FIELDS

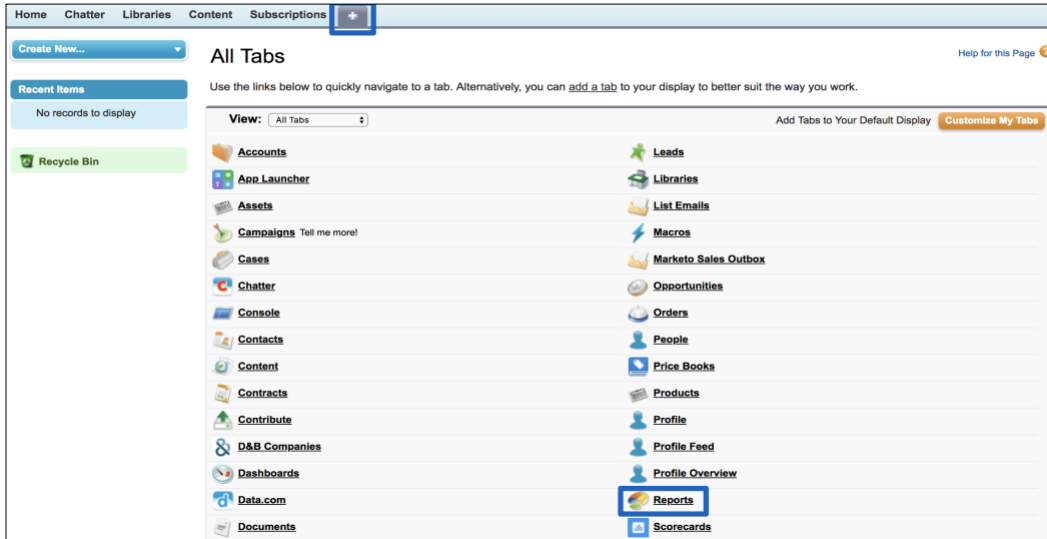
MSE offers custom fields for activity, account, contact, leads, and opportunities, which can be used either to enrich the reporting you already have in Salesforce or to build out new reports. You can reference all available Sales Engage Custom Salesforce field in the chart below.

Custom Activity Fields	Description	Type	Data Type
MSE Call Local Presence ID	As a user I can choose Local Presence as an option when I make calls from MSE Phone. Incoming call will show a local number for the receiver	Activity	Text
MSE Call Recording URL	Calls can be recorded and a link for this recording will be logged here	Activity	Text
MSE Campaign	Logs name of the MSE campaign the Contact/Lead is on	Activity	Text
MSE Campaign URL	Logs URL to the campaign that was created in MSE. Clicking on this will open the campaign in MSE web app	Activity	Text
MSE Campaign Current Step	If a contact/lead is on a campaign, this field will log the name of the step the contact/lead is currently on	Activity	Text
MSE Email Attachment Viewed	Logs data when an email is sent with an attachment and this attachment is viewed by the recipient	Activity	Checkbox
MSE Email Clicked	Logs a check mark when recipient clicks a link in the email	Activity	Checkbox
MSE Email Replied	Logs a check mark when recipient replies to email	Activity	Checkbox
MSE Email Status	Shows if an email is sent/in progress/bounce (tracking bounced email depends on the delivery channel used)	Activity	Text
MSE Email Template	Logs name of the MSE template that was used in email sent to Lead/Contact	Activity	Text
MSE Email Template URL	Logs URL to the template that was created in MSE. Clicking on this will open the template in MSE web app	Activity	Text
MSE Email URL	<a href="#">Clicking on this URL will open command center in MSE and pull up People Detail View history tab where user can see the sent email</a>	Activity	Text
MSE Email Viewed	Logs a check mark when recipient views an email	Activity	Checkbox

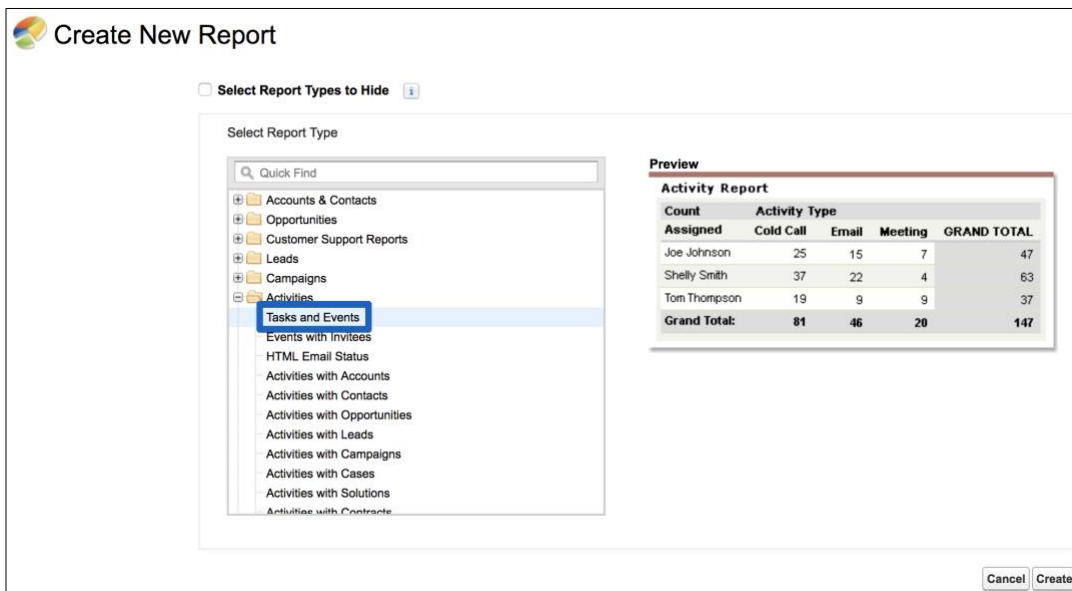
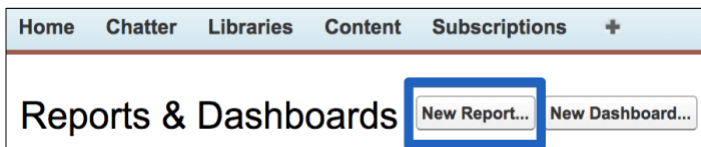
## REPORTS WITH MSE CUSTOM FIELDS

Using MSE’s custom fields you can create reports such as the priority call report using Sales Engage email engagement data to help reps focus time on the people or opportunities with the most momentum.

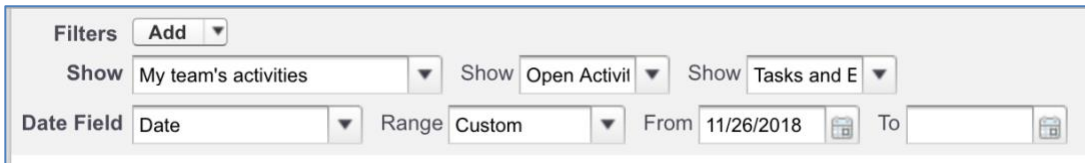
### Step 1: Go to SFDC Report Tab



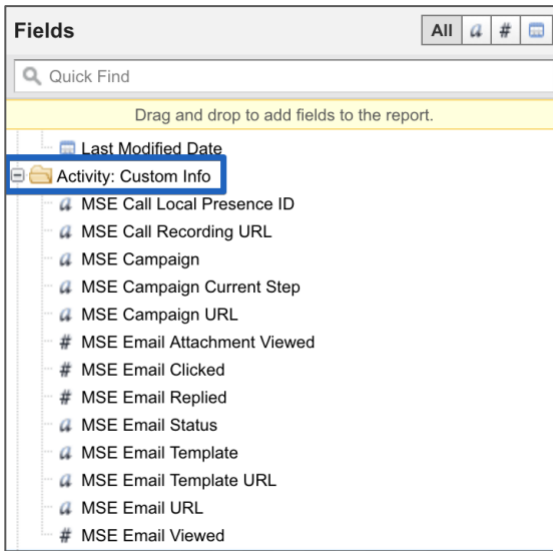
### Step 2: Create a Report with ‘Tasks and Events’



**Step 3: Set your filters and choose a date range**

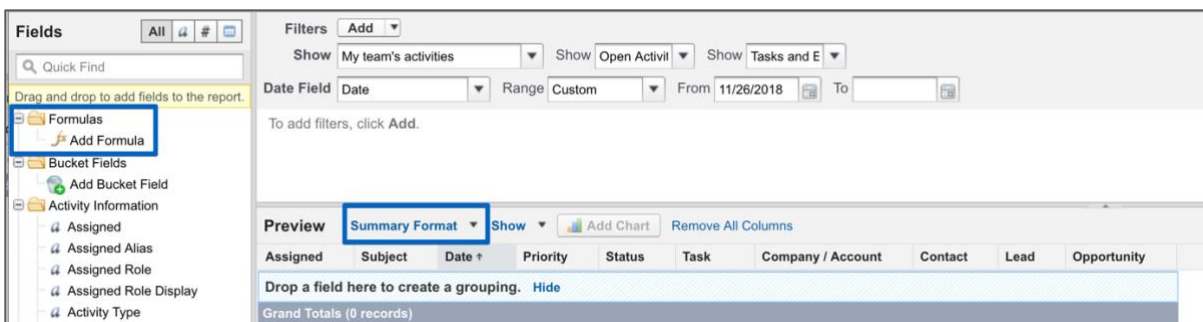


**Step 4: Drag Sales Engage data into your columns by typing Sales Engage into the field search. Example: Once you add Sales Engage data add a column for phone number so you can take action on this report and use it as a call list.**



**Step 5: You can now create reports using these fields. Continue on to the next section to take a look at our recommended reports.**

**Tip: If you intend to use formulas, change your report format to summary**



## Examples of reports

### Report: Call and Email Activity - AEs

Columns: Subject, Priority, Status, Company/Account, Contact, Lead, Opportunity, Activities #

#### Filter & Group Details:

Filtered By: [Edit](#)  
**Activity Type** equals **Email,Call** [Clear](#)

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Grouped By: **Date**    **Assigned**    **Activity Type**  
 Sorted By: **Date** ↑ ▾ > **Assigned** ↑ ▾ > **Activity Type** ↑ ▾

### Formula Used for Activities #

**Custom Summary Formula** Help for this Page

Column Name:   
 Description:   
 Format: **Number**    Decimal Places: **0**

Where will this formula be displayed?  
 All summary levels  
 Grand summary only  
 Grouping 1: Date (by Calendar Week)  
 Grouping 2: Assigned  
 Grouping 3: Activity Type

Formula	Functions	Tips
<div style="border: 1px solid #ccc; padding: 2px;"> <span>Summary Fields</span> ▾ <span>Operators</span> ▾ <span>Check Syntax</span> </div> <div style="border: 1px solid #ccc; padding: 2px; min-height: 100px;">                     RowCount                 </div>	<div style="border: 1px solid #ccc; padding: 2px;"> <span>All</span> ▾    <span>ABS</span> ▾                 </div> <div style="border: 1px solid #ccc; padding: 2px;">                     ABS(number)                      Returns the absolute value of a number, a number without its sign                 </div>	<div style="border: 1px solid #ccc; padding: 2px; text-align: center;"> <a href="#">Help on this function</a> </div>

Tip: Do not forget to group columns while creating a formula

### Report: Call and Email Activity - SDRs

Columns: Subject, Company / Account, Contact, Lead, Opportunity, Activities (#)

#### Filter & Group Details:

Filtered By: [Edit](#)  
**Activity Type** equals **Call,Email** [Clear](#)

---

Grouped By: **Date**    **Assigned**    **Activity Type**  
 Sorted By: **Date** ↑ ▾ > **Assigned** ↑ ▾ > **Activity Type** ↑ ▾

## Formula Used for Activities #

The screenshot shows the 'Custom Summary Formula' dialog box. The 'Column Name' is 'Activities (#)'. The 'Format' is set to 'Number' and 'Decimal Places' is '0'. Under 'Where will this formula be displayed?', 'All summary levels' is selected. The 'Formula' field contains 'RowCount'. The 'Functions' pane shows 'ABS(number)' with a description: 'Returns the absolute value of a number, a number without its sign'. Buttons for 'OK' and 'Cancel' are at the bottom.

## Report: Calls Made (SDR Activity Goals)

Columns: Subject, Company / Account, Contact, Lead, Opportunity, Date, Comments, Calls Made

## Filter & Group Details:

The screenshot shows the filter and group details. 'Filtered By:' is 'Activity Type equals Call' with an 'Edit' link and a 'Clear' button. 'Grouped By:' is 'Assigned'. 'Sorted By:' is 'Assigned' with an upward arrow and a dropdown arrow.

## Formula Used for Call Made

The screenshot shows the 'Custom Summary Formula' dialog box. The 'Column Name' is 'Calls Made'. The 'Format' is set to 'Number' and 'Decimal Places' is '0'. Under 'Where will this formula be displayed?', 'All summary levels' is selected. The 'Formula' field contains 'RowCount'. The 'Functions' pane shows 'ABS(number)' with a description: 'Returns the absolute value of a number, a number without its sign'. Buttons for 'OK' and 'Cancel' are at the bottom.

**Report: Closed Business**

Columns: Opportunity Name, Type, Lead Source, Amount, Expected Revenue, Close Date, Next Step, Stage, Probability (%), Fiscal Period, Age, Created Date, Owner Role, Account Name

Filter & Group Details:

Grouped By: Opportunity Owner  
 Sorted By: Opportunity Owner ↑ ▼

**Report: Closed Won Opportunities This Quarter**

Columns: Opportunity Name, Amount, Close Date, Created Date, Account Name, Opportunity Owner, Owner Role

Filter & Group Details:

Grouped By: Type  
 Sorted By: Type ↑ ▼

**Report: Email Activity and Top Opportunities**

Columns: Assigned, Subject, Opportunity Owner, Account Name, Amount, Emails Sent, Amount

Filter & Group Details:

Filtered By: [Edit](#)  
 Opportunity Stage does not contain Closed [Clear](#)  
 AND Type equals Email [Clear](#)

Grouped By: Opportunity Name  
 Sorted By: Opportunity Name ↑ ▼

Formula Used for Email Sent

Custom Summary Formula Help for this Page

Column Name:   
 Description:   
 Format: Number    Decimal Places: 0

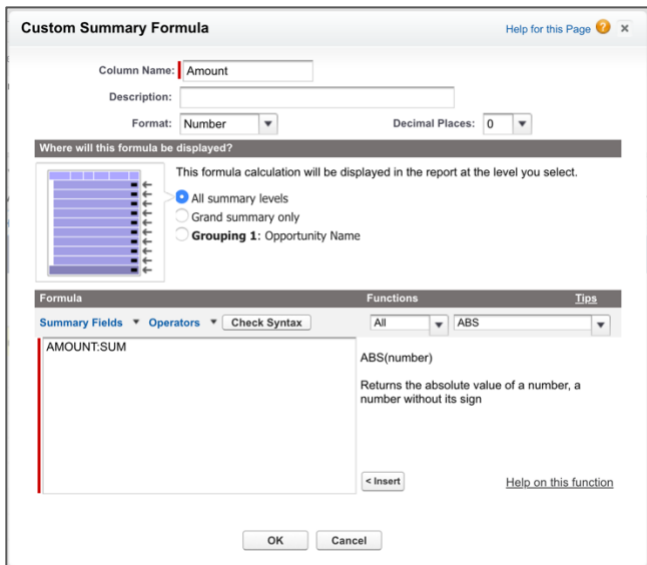
Where will this formula be displayed?  
 This formula calculation will be displayed in the report at the level you select.

All summary levels  
 Grand summary only  
 Grouping 1: Opportunity Name

Formula: Summary Fields    Operators    Check Syntax    Functions: All    ABS    Tips

RowCount    ABS(number)  
 Returns the absolute value of a number, a number without its sign

### Formula Used for Amount



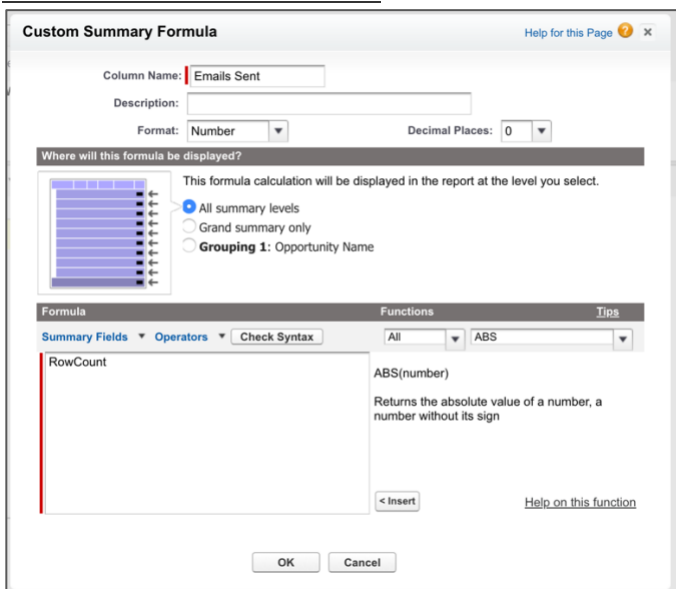
### Report: Email Activity with Closed Won Opportunities

Columns: Assigned, Opportunity Owner, Subject, Amount, MSE Email Viewed, MSE Email Click, MSE Email Replied, Emails Sent

### Filter & Group Details:



### Formula Used for Email Sent:

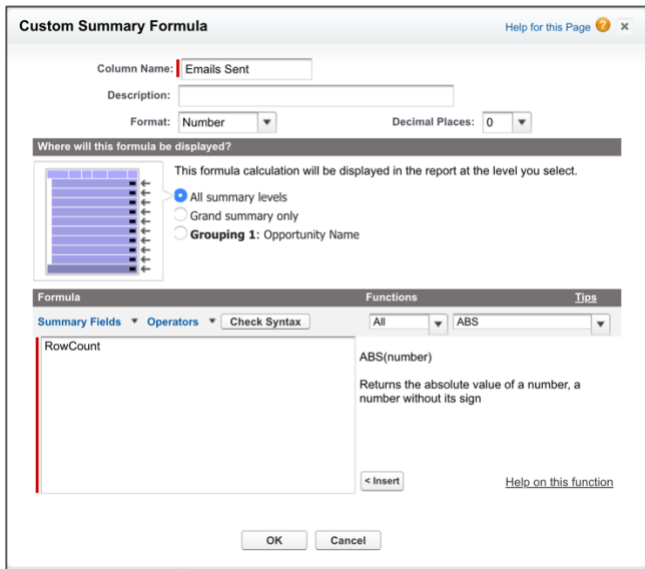




**Report: Email Activity with Open Opportunities**

Columns: Assigned, Subject, Opportunity Owner, Account Name, Amount, Emails Sent, Amount

**Formula for Email Sent**



**Report: Email Performance Metrics – AEs (Most Effective Closers)**

Columns: Subject, Company / Account, Created Date, Contact, Lead, MSE Email Viewed, MSE Email Clicked, MSE Email Replied, Emails Sent, MSE Email Viewed %, MSE Email Clicked %, MSE Email Replied %

**Filter & Group By Details:**



## Formula for Emails Sent

**Custom Summary Formula** [Help for this Page](#) ? ×

Column Name:

Description:

Format:  Decimal Places:

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

All summary levels  
 Grand summary only  
 **Grouping 1:** Opportunity Name

Formula:  Functions:  Tips:

Summary Fields  Operators  Check Syntax

Activity.MSE\_Viewed\_\_c.SUM / RowCount

ABS(number)  
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

## Formula for MSE Email Viewed %

**Custom Summary Formula** [Help for this Page](#) ? ×

Column Name:

Description:

Format:  Decimal Places:

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

All summary levels  
 Grand summary only  
 **Grouping 1:** Assigned

Formula:  Functions:  Tips:

Summary Fields  Operators  Check Syntax

Activity.MSE\_Viewed\_\_c.SUM / RowCount

ABS(number)  
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

### Formula for MSE Email Clicked %

The screenshot shows the 'Custom Summary Formula' dialog box. The 'Column Name' is 'MSE Email Clicked %'. The 'Format' is set to 'Number' and 'Decimal Places' is '2'. Under 'Where will this formula be displayed?', 'All summary levels' is selected. The formula field contains 'Activity.MSE\_Clicked\_\_c:SUM/RowCount'. The 'Functions' pane shows 'ABS(number)' selected, with a description: 'Returns the absolute value of a number, a number without its sign'. Buttons for 'OK' and 'Cancel' are at the bottom.

### Formula for MSE Email Replied %

The screenshot shows the 'Custom Summary Formula' dialog box. The 'Column Name' is 'MSE Email Replied %'. The 'Format' is set to 'Number' and 'Decimal Places' is '2'. Under 'Where will this formula be displayed?', 'All summary levels' is selected. The formula field contains 'Activity.MSE\_Replied\_\_c:SUM/RowCount'. The 'Functions' pane shows 'ABS(number)' selected, with a description: 'Returns the absolute value of a number, a number without its sign'. Buttons for 'OK' and 'Cancel' are at the bottom.

### **Report: Email Performance Metrics – SDRs (Most Effective SDRs)**

Columns: Subject, Company / Account, Created Date, Contact, Lead, MSE Email Viewed, MSE Email Clicked, MSE Email Replied, Emails Sent, MSE Email Viewed %, MSE Email Clicked %, MSE Email Replied %

#### **Filter & Group Details:**

The screenshot shows the 'Filter & Group Details' section. It includes a 'Filtered By:' section with 'Activity Type equals Email' and an 'Edit' link. Below it, the 'Grouped By:' is set to 'Assigned' and the 'Sorted By:' is set to 'Assigned' with an upward arrow icon.

## Formula for Emails Sent

**Custom Summary Formula** Help for this Page x

Column Name:

Description:

Format:  Decimal Places:

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

All summary levels  
 Grand summary only  
 Grouping 1: Opportunity Name

Formula	Functions	Tips
Summary Fields <input type="text"/> Operators <input type="text"/> Check Syntax <input type="button"/>	<input type="text" value="All"/> <input type="text" value="ABS"/>	
<input type="text" value="RowCount"/>	ABS(number) Returns the absolute value of a number, a number without its sign	<input type="button" value="Help on this function"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

## Formula for MSE Email Viewed %

**Custom Summary Formula** Help for this Page x

Column Name:

Description:

Format:  Decimal Places:

Where will this formula be displayed?

This formula calculation will be displayed in the report at the level you select.

All summary levels  
 Grand summary only  
 Grouping 1: Assigned

Formula	Functions	Tips
Summary Fields <input type="text"/> Operators <input type="text"/> Check Syntax <input type="button"/>	<input type="text" value="All"/> <input type="text" value="ABS"/>	
<input type="text" value="Activity.MSE_Viewed_c:SUM / RowCount"/>	ABS(number) Returns the absolute value of a number, a number without its sign	<input type="button" value="Help on this function"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

### Formula for MSE Email Clicked %

The screenshot shows the 'Custom Summary Formula' dialog box. The 'Column Name' is 'MSE Email Clicked %'. The 'Format' is set to 'Number' and 'Decimal Places' is '2'. Under 'Where will this formula be displayed?', 'All summary levels' is selected. The formula field contains 'Activity.MSE\_Clicked\_c:SUM/RowCount'. The 'Functions' list shows 'ABS(number)' with a description: 'Returns the absolute value of a number, a number without its sign'. Buttons for 'OK', 'Cancel', and '< Insert' are visible.

### Formula for MSE Email Replied %

The screenshot shows the 'Custom Summary Formula' dialog box. The 'Column Name' is 'MSE Email Replied %'. The 'Format' is set to 'Number' and 'Decimal Places' is '2'. Under 'Where will this formula be displayed?', 'All summary levels' is selected. The formula field contains 'Activity.MSE\_Replied\_c:SUM/RowCount'. The 'Functions' list shows 'ABS(number)' with a description: 'Returns the absolute value of a number, a number without its sign'. Buttons for 'OK', 'Cancel', and '< Insert' are visible.

### Report: MSE Campaign Performance

Columns: Subject, Company / Account, Name, Created Date, Assigned, Contact, Lead, Marketo Sales Email Viewed, Marketo Sales Email Clicked, Marketo Sales Email Replied, Marketo Sales Email Clicked %, Marketo Sales Email Replied %, Marketo Sales Email Viewed %

### Filter & Group Details:

The screenshot shows the 'Filter & Group Details' interface. It displays 'Filtered By: Edit' with the criteria 'Marketo Sales Campaign not equal to Clear AND Activity Type equals Email Clear'. Below, 'Grouped By: Marketo Sales Campaign' and 'Sorted By: Marketo Sales Campaign' are shown with dropdown menus and arrows.

Formula Used: Same as previous reports

**Report: Open Opportunities by Stage**

Columns: Account Name, Opportunity Name, Amount, Probability (%), Close Date, Opportunity Owner, Owner Role, Amount by Stage

Filter & Group Details:

Grouped By: Stage  
 Sorted By: Stage ↑ ▼

Formula Used for Amount By Stage

**Custom Summary Formula** Help for this Page

Column Name: Amount by Stage  
 Description:   
 Format: Currency Decimal Places: 2

Where will this formula be displayed?  
 This formula calculation will be displayed in the report at the level you select.  
 All summary levels  
 Grand summary only  
 Grouping 1: Stage

Formula: AMOUNT:SUM  
 Functions: ABS(number)  
 Returns the absolute value of a number, a number without its sign

OK Cancel

**Report: Opportunities in the Pipeline: Pipeline by Rep**

Columns: Opportunity Name, Account Name, Type, Amount, Close Date, Stage, Probability (%), Created Date, Owner Role

Filter & Group Details:

Grouped By: Opportunity Owner  
 Sorted By: Opportunity Owner ↑ ▼

**Report: Template Performance: Most Effective Templates**

Columns: Assigned, Subject, Name, Company / Account, Marketo Sales Email Viewed, Marketo Sales Email Clicked, Marketo Sales Email Replied, # of Emails Sent, Marketo Sales Email Clicked %, Marketo Sales Email Replied %, Marketo Sales Email Viewed %

**Filter & Group Details:**

Filtered By: [Edit](#)  
**Marketo Sales Email Template** not equal to [Clear](#)  
**AND Activity Type** equals **Email** [Clear](#)

Grouped By: **Marketo Sales Email Template**      **Marketo Sales Email Template URL**  
 Sorted By: **Marketo Sales Email Temp...** ↑ ▼ >      **Marketo Sales Email Temp...** ↑ ▼

**Formula Used for # Email Sent:**

**Custom Summary Formula** [Help for this Page](#) x

Column Name:   
 Description:   
 Format: **Number**      Decimal Places: **0**

Where will this formula be displayed?  
 This formula calculation will be displayed in the report at the level you select.  
 All summary levels  
 Grand summary only  
 **Grouping 1:** Marketo Sales Email Template  
 **Grouping 2:** Marketo Sales Email Template URL

Formula      Functions      Tips  
 Summary Fields   Operators   Check Syntax   All   ABS

RowCount      ABS(number)  
 Returns the absolute value of a number, a number without its sign

< Insert      [Help on this function](#)

OK      Cancel

**Formula Used for Marketo Sales Email Clicked %**

**Custom Summary Formula** [Help for this Page](#) x

Column Name:   
 Description:   
 Format: **Number**      Decimal Places: **2**

Where will this formula be displayed?  
 This formula calculation will be displayed in the report at the level you select.  
 All summary levels  
 Grand summary only  
 **Grouping 1:** Marketo Sales Email Template  
 **Grouping 2:** Marketo Sales Email Template URL

Formula      Functions      Tips  
 Summary Fields   Operators   Check Syntax   All   ABS

Activity.Tout\_Clicked\_\_c:SUM/RowCount      ABS(number)  
 Returns the absolute value of a number, a number without its sign

< Insert      [Help on this function](#)

OK      Cancel

### Formula Used for Marketo Sales Email Replied %

The screenshot shows the 'Custom Summary Formula' dialog box. The 'Column Name' is 'Sales Email Replied %'. The 'Format' is set to 'Number' and 'Decimal Places' is '2'. Under 'Where will this formula be displayed?', 'All summary levels' is selected. The formula field contains 'Activity.Tout\_Replied\_\_c:SUM/RowCount'. The 'Functions' list shows 'ABS(number)' with a description: 'Returns the absolute value of a number, a number without its sign'. There are 'OK' and 'Cancel' buttons at the bottom.

### Formula Used for Marketo Sales Email Viewed %

The screenshot shows the 'Custom Summary Formula' dialog box. The 'Column Name' is 'Marketo Sales Email Vi'. The 'Format' is set to 'Number' and 'Decimal Places' is '2'. Under 'Where will this formula be displayed?', 'All summary levels' is selected. The formula field contains 'Activity.Tout\_Viewed\_\_c:SUM/RowCount'. The 'Functions' list shows 'ABS(number)' with a description: 'Returns the absolute value of a number, a number without its sign'. There are 'OK' and 'Cancel' buttons at the bottom.

### Report: Total Pipeline for Current Quarter: Total Pipeline for Current Fiscal Quarter

Columns: Opportunity Name, Account Name, Type, Opportunity Owner, Amount, Stage, Probability (%), Created Date

### Filter & Group Details:

The screenshot shows the 'Filter & Group Details' dialog box. It has two sections: 'Grouped By:' with a dropdown menu set to 'Close Date', and 'Sorted By:' with a dropdown menu set to 'Close Date' and an arrow icon.



**Report: Total Pipeline for Next Quarter: Total Pipeline for Next Fiscal Quarter**

Columns: Opportunity Name, Account Name, Type, Opportunity Owner, Amount, Stage, Probability (%), Created Date

**Filter & Group Details:**

Grouped By: Close Date
Sorted By: Close Date ↑ ▼

## CUSTOMIZATIONS FOR DASHBOARDS

All Dashboards and Reports can be customized to for your organization, including filtering the source reports for custom fields in your Salesforce instance and/or adjusting the formatting of each dashboard component.

You'll find MSE recommended customizations based on our experience on how Sales Engage integration with Salesforce can create value and drive meaningful insights for organizations in the chart below on pages

Dashboard Name	Type	Source Report	Customization
Pipeline Summary	Metric	Total Pipeline for Current Quarter and Total Pipeline for Next Quarter	Filter reports by specific opportunity stages or opportunity types depending on how your company defines pipeline
Quarter-to-Date Closed Won	Gauge	Closed Won Opportunities This Quarter Shows all Opportunities with "Closed Won" as the Opportunity Status	Set the breakpoints for the dial in the dashboard editor based on your company's targets
Opportunities in the Sales Funnel	Funnel Chart	Open Opportunities By Stage Shows all Opportunities with "Open" as the Opportunity Status and your company's Opportunity Stages	Filter the report by specific opportunity stages to show a zoomed in view of your Sales Funnel
Closed Business	Table	Closed Business Shows all Opportunities with "Closed Won" as the Opportunity Status	None
Pipeline by Rep	Horizontal Bar Chart	Opportunities in the Pipeline Shows all opportunities with "Open" as the Opportunity Status	To only display a specific team (ie. Pipeline), filter the Report by "Owner Role" (or another Opportunity Owner field)
Top Opportunities in the Pipeline	Table	Email Activity & Top Opportunities Shows all Open Opportunities (Opportunity Stage does not contain "Closed")	Filter the report by specific opportunity stages or opportunity types depending on how your company defines pipeline
AE Activity Level	Line Chart	Call and Email Activity - AEs Shows all Tasks with Activity Type equal to "Email" or "Call"	To only display a specific team (ie. AEs), filter the Report by "Assigned Role"  Adjust the "Activity Type" filter on the report to pull in additional activities your team is measured on (I.E. Meeting Booked)

Activities for Closed Won Opportunities	Table	Email Activity With Closed Won Opportunities Shows all Opportunities with Opportunity Stage contains "Won"	You can filter by opportunity type. Sorted by Sum of Amount in descending order
Most Effective Closers	Table	Email Performance Metrics - AEs	To only display a specific team (ie. AEs), filter the Report by "Assigned Role" Set conditional highlighting breakpoints depending on your team's targets Sorted by Emails Sent in descending order
Most Effective SDRS	Table	Email Performance Metrics - SDRs	To only display a specific team (ie. AEs), filter the Report by "Assigned Role" Set conditional highlighting breakpoints depending on your team's targets Sorted by Emails Sent in descending order
Opportunities with the Highest Potential to Close	Table	Email Activity With Open Opportunities Shows all Open Opportunities (Opportunity Stage does not contain "Closed") and Tasks with Type equal to "Email"	Filter reports by specific opportunity stages or opportunity types to get a more granular view Sorted by Sum of Sales Engage Emails Tracked in descending order
Most Effective Templates to Get a Reply	Table	Template Performance Shows all Tasks with "Email" as Activity Type	Filter the report by a minimum threshold of number of emails sent Sorted by Average Sales Engage Replied
SDR Team Activity Level	Line Chart	Call and Email Activity - SDRs Shows all Tasks with Activity Type equal to "Email" or "Call"	To only display a specific team (ie. Pipeline), filter the Report by "Assigned Role" Adjust the "Activity Type" filter on the report to pull in additional activities your team is measured on (I.E. Meeting Booked)
SDR Call Activity Goals	Table	Calls Made Shows all Tasks with Activity Type equal to "Call" and Includes links to call recordings	To only display a specific team (ie. Pipeline), filter the Report by "Assigned Role" Set conditional highlighting breakpoints depending on your team's targets Sorted by Calls Made in descending

			order
Most Effective Campaigns to Get a Reply	Table	Sales Engage Campaign Performance Shows all Tasks with "Email" as Activity Type	Filter the report by a minimum threshold of number of emails sent Sorted by Average Sales Engage Replied in descending order

You can reference the Salesforce Video and Help Articles below, for guidance on customizing reports and Dashboards within Salesforce.

- [Getting Started With Reports and Dashboards](#)
- [Dashboard Overview](#)
- [Using the Drag and Drop Report Builder](#)
- [5 Ways to Get the Most Out of Your Reports and Dashboards](#)
- [How to change Visual settings for dashboard chart components](#)
- [How to Modify a Dashboard Component](#)
- [How to Change the Data Settings for Dashboard Components](#)