

SALESFORCE ENGAGE CHEAT SHEET

FILTERS

Filters let you define your own criteria and populate a list of matching prospects in almost real-time. The following criteria are available:

- Page Views
- File Downloads
- Paid Search Clicks
- Forms
- Webinars & Events
- Site Search
- Email Clicks
- One-to-one email opens
- All Email Opens

Selecting multiple criteria here will pull prospects who match **any** of the criteria.



GEOGRAPHIC CRITERIA

Filter prospects based on where they might be located.

You can filter by groups of countries, individual countries, or individual US states, territories, and Canadian provinces.

EXAMPLE

Let's say that you create this filter:

- **Leads & Contacts Criteria** = Only my assigned leads and contacts
- **Activity Criteria** = All Email Opens; Forms; Email Clicks
- **Geographic Criteria** = California; British Columbia

This filter will return your assigned leads and contacts located in California or British Columbia, who have either opened an email, filled out a form, or clicked in an email.

LEGEND



= edit filter

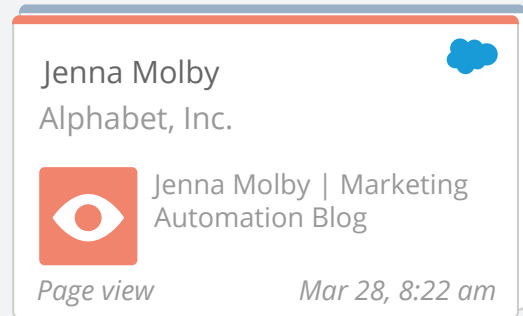


= delete filter



= pause filter

MARKETING ACTIONS



Prospect Marketing Actions will appear in filters as cards.



shows last **7** days of activity



grouped by prospect



click a card to get more info



latest activity appears on top

The colors of each card represent a different activity. You can quickly glance at the cards and have an overview of the prospect's actions.

LEGEND



= Page visits



= Filled out form



= Email opens & clicks



= Custom Redirect link



= File download