All Account Activities Dashboards

Objective:

Create "All Account Activities Dashboards" dashboard to provide summary of all activities of partners in B2B environment.

Input Data:

- Partners Information Dimensions.csv – This data source contains all the information related to partners. For e.g., ID, account name, demography, programs association etc.

- Partners Login Activity.csv – The login activities of all the partners are tracked using this data source.

- Content Download.csv – A business has a central repository containing information, eBooks, advertising media, flares etc for the usage by its partners. The downloads activities of these contents are tracked using this data source.

- Email Marketing V2.csv – Partners are responsible for marketing and sharing content of business. The emails sent by partners for marketing and its responses are tracked using this data source.

- Events & Webinars.csv – Information related to events and webinars hosted by partners are tracked using this data source.

- Social Marketing.csv – Information related to social median advertising are tracked using this data source.

Dashboard Output:

All Account Activities Dashboard
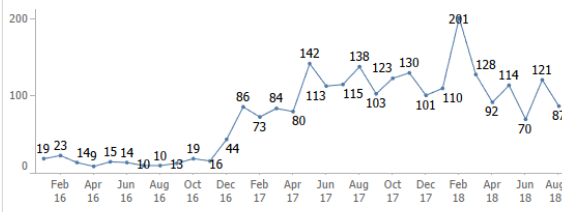
Filters

Date
1/1/2010   12/31/2020

Region
(All)

Program Name
(All)

Profile:Profile Value
(All)

Accounts Activity

898 — New accounts created in the system
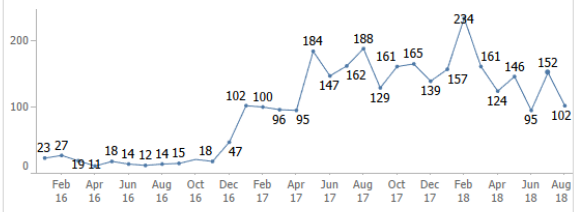**9,738** — Total logins
758 — Accounts logged in atleast once

Accounts Logged-In By Month

19, 23, 14, 9, 15, 14, 10, 10, 13, 19, 16, 44, 86, 84, 73, 80, 113, 142, 115, 138, 103, 123, 101, 130, 110, 201, 92, 128, 70, 114, 121, 87
(Feb 16 – Aug 18)

Users Activity

1,680 — New users created in the system
1,326 — Users logged-in atleast once
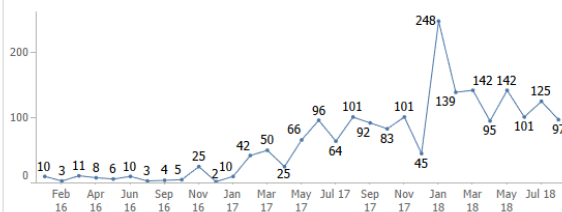**926** — *Total logins within last 90 days

Users Logged-In By Month

23, 27, 19, 11, 18, 14, 12, 14, 15, 18, 47, 102, 100, 96, 95, 147, 184, 162, 188, 129, 161, 139, 165, 157, 124, 234, 95, 161, 146, 152, 102
(Feb 16 – Aug 18)

Asset Download

231 — Accounts downloaded assets
1,951 — Total assets downloaded
327 — Unique assets downloaded

Assets Downloaded By Month

10, 3, 11, 8, 6, 10, 3, 4, 5, 25, 10, 42, 50, 66, 96, 64, 92, 101, 83, 101, 45, 139, 248, 142, 95, 142, 101, 125, 97
(Feb 16 – Jul 18)

Email Marketing

116 — Accounts sent email
1,056,688 — Total emails sent
399 — Total leads generated

Emails Sent vs. Leads Generated By month

Emails Sent: 7, 2,050, 1,562, 610, 51, 24,256, 73,460, 56,781, 122,419, 107,290
Leads Generated: 0, 0, 0, 4, 0, 0, 1, 0, 0, 23, 30, 7, 34, 18, 26, 24, 45, 12, 15, 11, 21, 42, 31, 12, 18, 23
(Feb 16 – Jul 18)
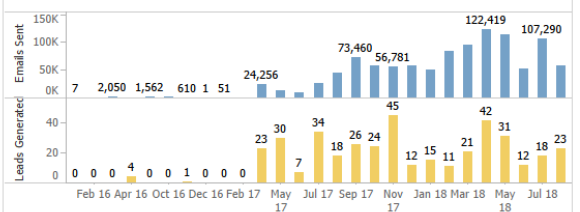
Events And Webinars

4 — Accounts hosted events and webinars
72 — Total events and webinars created
1,721 — Total registrations

People Invited vs. People Registered By Month

Invitations sent: 0, 0, 0, 5,499, 0, 3,139, 840, 442, 436, 3,418, 561, 2,776, 2,065, 0, 49, 0, 0
Registrations: 24, 21, 0, 164, 0, 190, 327, 68, 150, 415, 67, 143, 61, 60, 31, 0, 0
(Apr 17 – Aug 18)
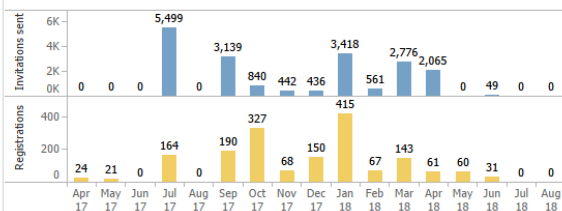
Social Media Syndication

53 — Accounts subscribed
946 — Total posts posted
816 — Total interactions

Posts Posted vs. Posts Interactions By Month

Posts Posted: 1, 43, 95, 85, 38, 42, 260, 268, 97, 17, 0
Interactions: 0, 48, 128, 51, 28, 33, 212, 206, 88, 22, 0
(Jul 17 – Jul 18)
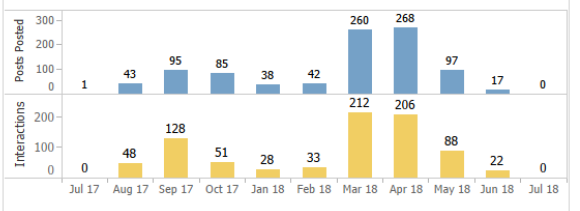
Instructions for building views:

1. Filters:

Date
    1.1
| 01-01-2010 | | 31-12-2020 |

Region   1.2
| (All) | ▼ |

Program Name 1.3
| (All) | ▼ |

Profile:Profile Value   1.4
| (All) | ▼ |

1.1 Start Date and End Date filter:
a) Create start date and start date parameters which should affect all the sheets on the dashboard

1.2 Region filter:
a) Apply "Geographic Region Name" filter from "Partners Information Dimensions" data source and this filter should affect all the sheets on the dashboard
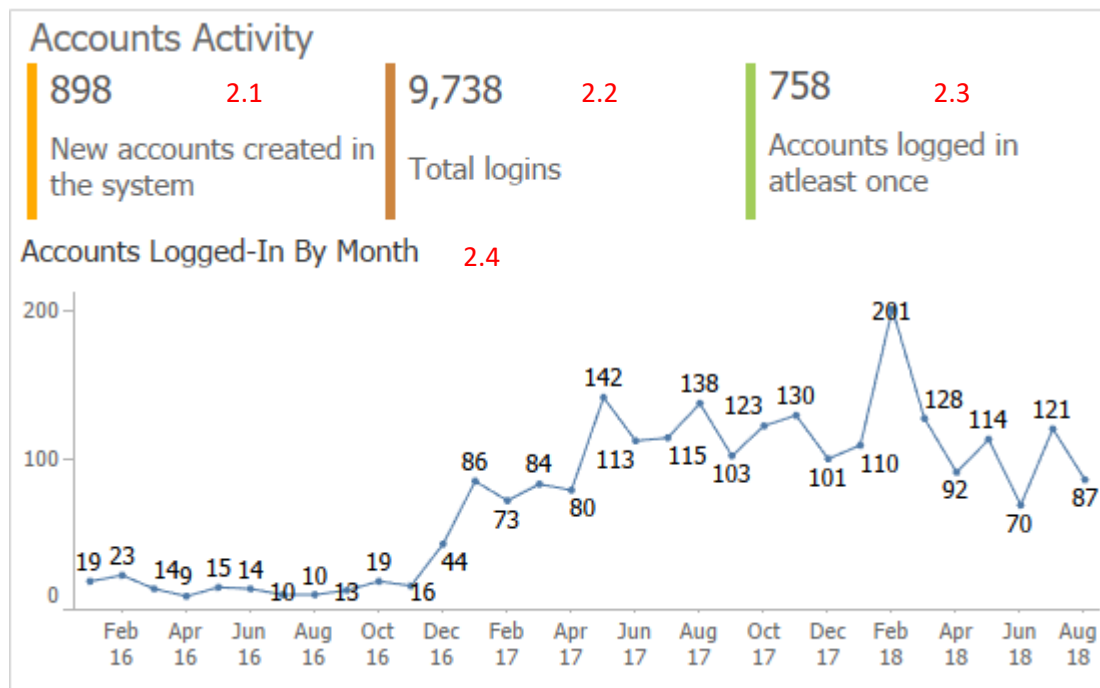
1.3 Program Name filter:
a) Apply "Program Name" filter from "Partners Information Dimensions" data source and this filter should affect all the sheets on the dashboard

1.4 Profile:Profile Value filter:
a) Apply "Profile:Profile Value" filter from "Partners Information Dimensions" data source and this filter should affect all the sheets on the dashboard

Note: All these filters should act as global filters i.e. changing the value of any filter should reflect the results in all the sheets on this dashboard.

2. Account Activity Section:

Accounts Activity

898 — 2.1
New accounts created in the system

9,738 — 2.2
Total logins

758 — 2.3
Accounts logged in atleast once

Accounts Logged-In By Month — 2.4

Trend line chart values by month:
Feb 16: 19, 23; Apr 16: 14, 9; Jun 16: 15, 14; Aug 16: 10, 10; Oct 16: 13, 19; Dec 16: 16, 44; Feb 17: 86, 73; Apr 17: 84, 80; Jun 17: 113, 115; Aug 17: 142, 138, 123, 103; Oct 17: 130, 101; Dec 17: 110; Feb 18: 201, 128, 92; Apr 18: 114, 70; Jun 18: 121, 87

2.1 Account Created KPI:
   a) The number of new partners enrolled in the business are displayed in this KPIS.
   b) Calculated as number of "SW Account ID" from "Partners Information Dimensions" data source

2.2 Total Logins KPI:
   a) This KPI signifies the number of times the registered partners logged in.
   b) A partner may login n times in a day, so "n" is the number of times that specific partner logged in i.e. consider USERID – 1, has logged in 10 times over the period selected in date filter, so the 10 is the count of login activity for USERID -1, the summation of number of login activity of all the user is considered as total login.
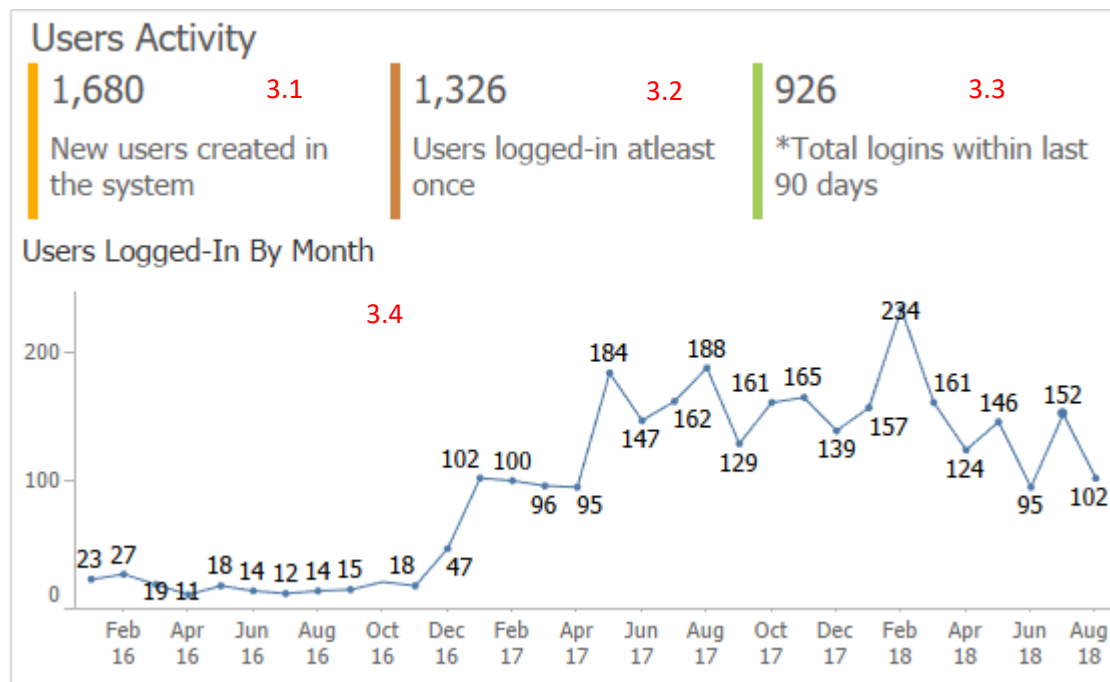   c) Calculated referring number of "USERID" from "Partners Login Activity" data source

2.3 Account Logged in at least once KPI:
   a) The number of partners logged in once or more than once is tracked using this KPI
   b) Calculated as number of "SW Account ID" from "Partners Login Activity" data source

2.4 Account Logged-In By Month Trend Line:
   a) The progression of number of partners logged in over months are depicted in this trend line chart.

3. Users Activity Section:

Users Activity

| 1,680 | 3.1 | 1,326 | 3.2 | 926 | 3.3 |

New users created in the system

Users logged-in atleast once

*Total logins within last 90 days

Users Logged-In By Month

3.4

3.1 User Created KPI:
- a) The total number of users enrolled due to the efforts of registered partners is tracked using this KPI
- b) Calculated as count of "User ID" from "Partners Information Dimensions" data source

3.2 User Logged-in at least once KPI:
- a) The number of users who had logged in at least once is tracked in this KPI
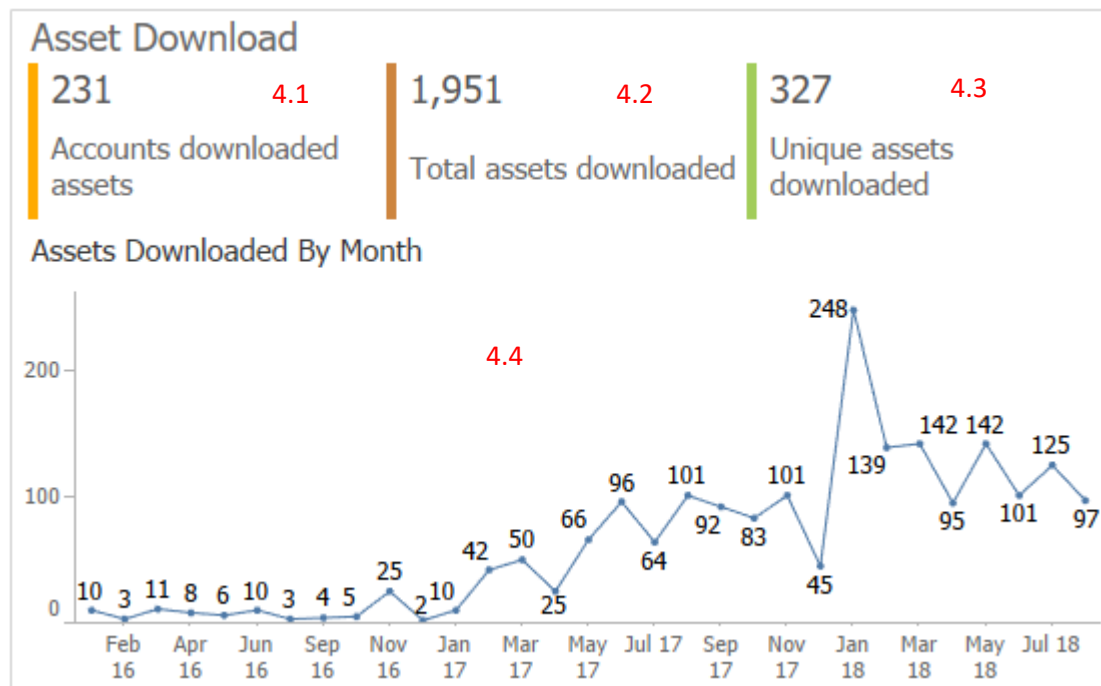- b) Calculated as count of "USERID" from "Partners Login Activity" data source

3.3 Total Login within last 9- days KPI:
- a) The total number of users logged in within last 9 days with respect to today is tracked using this KPI
- b) Calculated as count of "USERID" for last 90 days from "Partners Login Activity" data source

3.4 User Logged-In By Month Trend line chart:
- a) The total number of user's login activities over months is tracked using this trend line chart

4. Assets Download Section:

Asset Download

231 _(4.1)_	1,951 _(4.2)_	327 _(4.3)_
Accounts downloaded assets	Total assets downloaded	Unique assets downloaded

Assets Downloaded By Month _(4.4)_

4.1 Accounts downloaded assets KPI
   a) This KPI displays the number of partners who had downloaded the content (flares, video, eBooks etc.) from central repository of business for marketing purpose
   b) Calculated as number of "Account ID" from "Content Download" data source.

4.2 Total Assets Downloaded KPI
   a) The total number of contents (flares, video, eBooks etc.) by partners is tracked in this KPI
   b) Calculated as number of "Download ID" from "Content Download" data source

4.3 Unique Assets Downloaded KPI
   a) There are different types of contents available in central repository. Different partners may be downloading few attractive contents. The count of these content is shown in this KPI
   b) Calculated as number of "Asset ID" from "Content Download" data source

4.4 Assets Downloaded By Month KPI
   a) The progression of total assets downloaded over months is reflected in this chart.

5. Email Marketing Section:
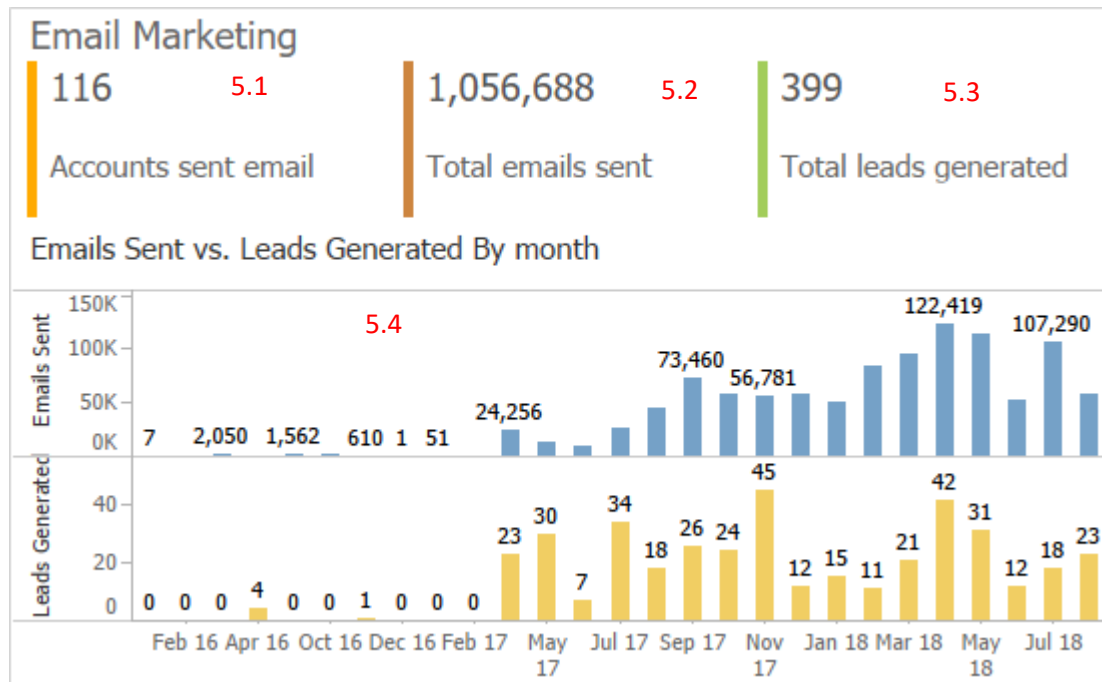
5.1 Accounts Sent Email KPI:
   a) The number of active partners sending emails for marketing purpose is tracked in this KPI
   b) Calculated as number of "Account ID" from "Email Marketing V2" data source

5.2 Total Email Sent KPI:
   a) The total number of emails sent by partners is reflected in this KPI
   b) Calculated as number of "Emails Sent Count" from "Email Marketing V2" data source

5.3 Total leads generated KPI
   a) Total leads generated by the efforts of partners is tracked in this KPI
   b) Calculated as number of "Leads Count (Forms Only)" from "Email Marketing V2" data source

5.4 Emails Sent vs. Leads Generated By Months Trend line chart:
   a) Progression of emails sent by partner and the leads generated as a result of theses emails are displayed over months

6. Events and Webinar Section:
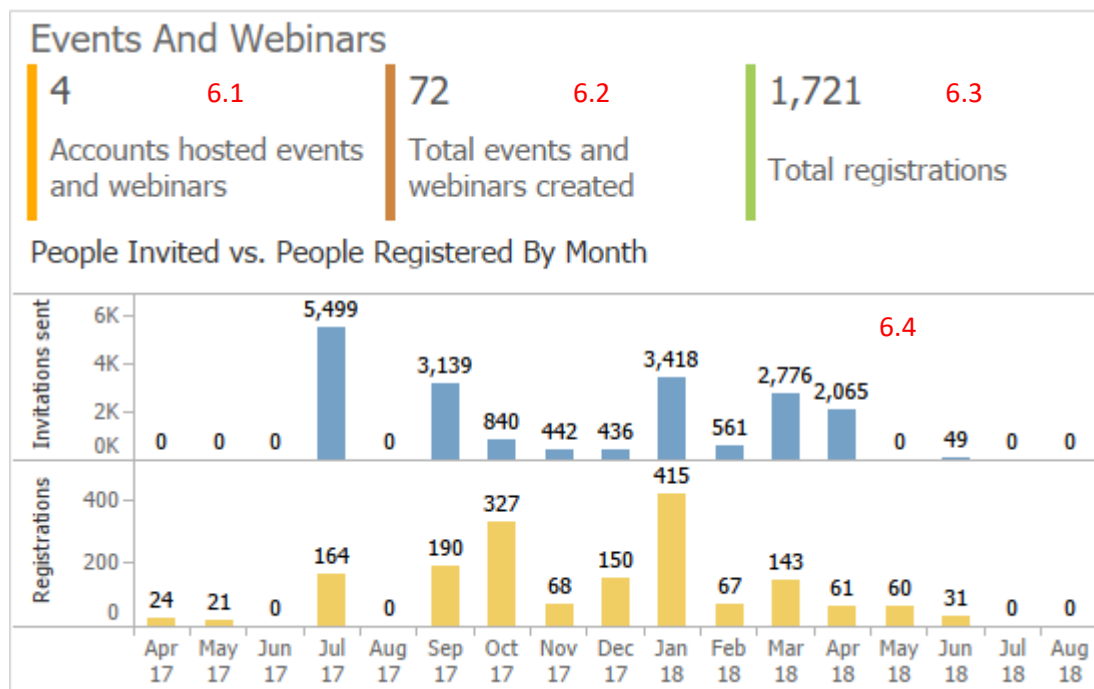
6.1 Accounts hosted events and webinar KPI
   a) The number of partners hosting events and webinars for advertising or promoting the business is tracked in this KPI
   b) Calculated as number of "Accounts Hosted Events CP" from "Events & Webinars" data source

6.2 Total events and webinar created KPI
   a) The total number of events or webinar hosted by partners is listed in this KPI
   b) Calculated as number of "Campaign ID" from "Events & Webinars" data source

6.3 Total registration KPI
   a) The total number of registrations for all the events and webinars is displayed in this KPI
   b) Calculated as count of "Registered" from "Events & Webinars" data source

6.4 People Invited vs. People Registered By Month Trend Line Chart
   a) Progression of number of invited users or organization vs the actual number of registrations for events over months is show in this chart

7. Social Media Syndication
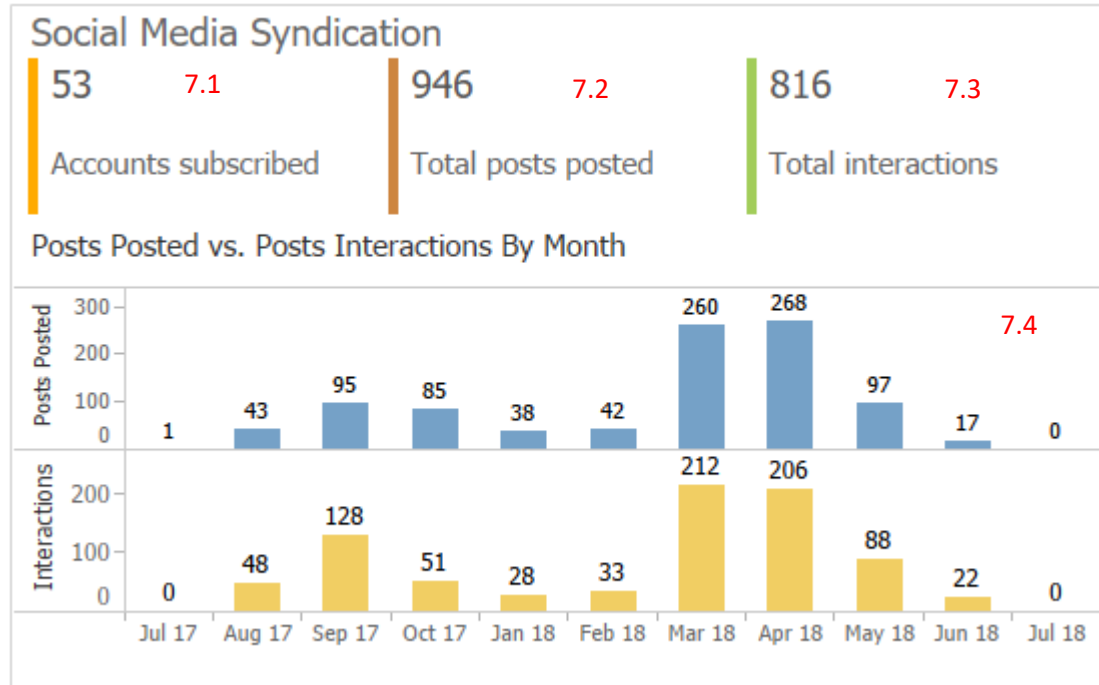
7.1 Accounts Subscribed KPI:
   a) The number of partners subscribing to the social media content of business is shown in this KPI
   b) Calculated as count of "SW Account ID" from "Social Marketing" data source

7.2 Total post posted KPI:
   a) Total number of posts posted by partners on social media platforms is tracked using this KPI
   b) Calculated as count of "Social Post ID" from "Social Marketing" data source

7.3 Total interactions KPI
   a) The total interaction with the posted post is tracked using this KPI
   b) Calculated as number of "Total Interactions" from "Social Marketing" data source

7.4 Posts Posted vs. Posts Interactions By Months Trend line chart:
   a) The total number of post posted on social media vs number of interactions taken place with these media over period of months is displayed in this chart