

Applying Filters in Reports, Smart Lists & Smart Campaigns

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Overview

While creating reports, smart lists, or smart campaigns in Marketo you need to define specific groups of people using the filters. They can be used all over Marketo such as in reports, smart lists, smart campaigns, segmentation, dynamic content, and more.

Depending on your requirement you may need to use different types of filters in Reports, Smart lists, and Smart Campaigns. This guide shows you how to correctly apply the appropriate filter.

Report Setup

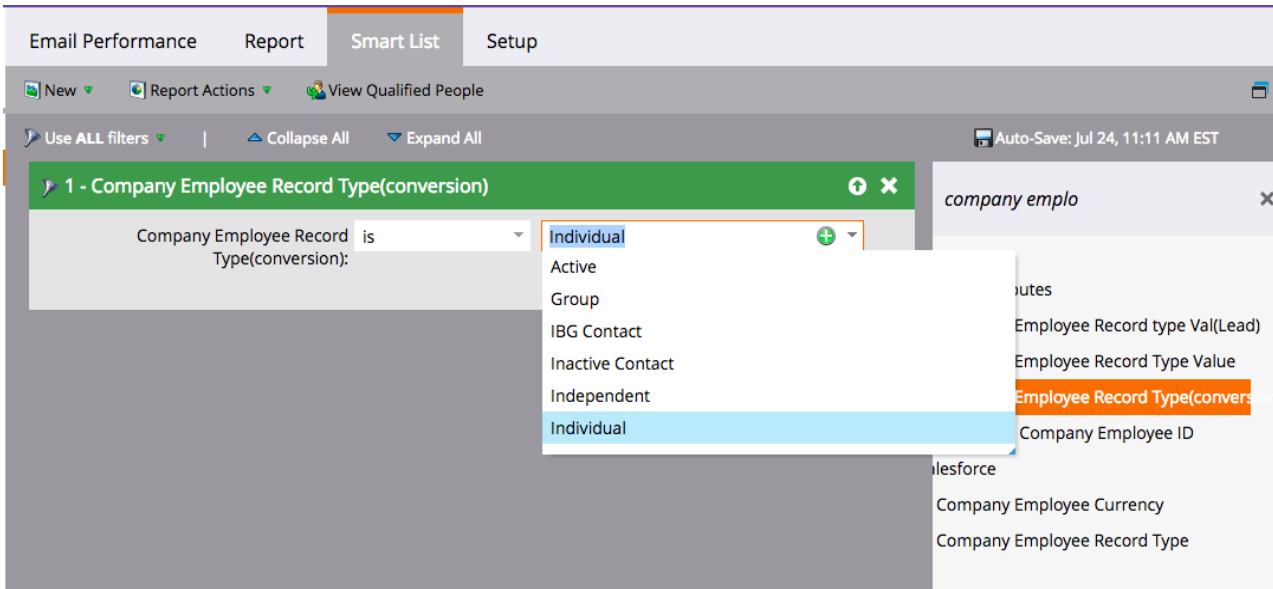
Reports in Marketo are being used to analyze people, your program, landing pages, emails and social assets. They can be created under each program in Marketing Activities as well as under the Analytics tab.

You need to use a certain type of filters such as LOB, region, type of record and program to drill down the report as per your business requirement.

To filter a report to show either SPDR or Institutional data, add your filters as follows:

	SPDR Filters	Institutional Filters
Leads only	Company Employee Record Type (conversion) = IBG Contact	Company Employee Record Type (conversion) = Individual
Contacts only	Company Employee Record Type Value = IBG Contact	Company Employee Record Type Value = Individual
Both leads & contacts	Company Employee Record Type (conversion) = IBG Contact OR Company Employee Record Type Value = IBG Contact	Company Employee Record Type (conversion) = Individual OR Company Employee Record Type Value = Individual

Example: Showing only Institutional leads:



Smart List Setup

Smart lists allow you to find specific groups of people using simple filters. They are used all over Marketo, such as in smart campaigns, programs, reports, segmentations, engagement programs, dynamic content and more. Depending on your needs, smart lists can be created in the Database and Program as a local asset within Marketo.

When you are creating a smart list, you must ensure that the data is pulled from the correct line of business.

To filter a smart list to show either SPDR or Institutional data, add your filters as follows:

	SPDR	Institutional
Leads	Company Employee Record Type (conversion) = IBG Contact	Company Employee Record Type (conversion) = Individual
Contacts	Company Employee Record Type Value = IBG Contact	Company Employee Record Type Value = Individual
Both leads & contacts	Company Employee Record Type (conversion) = IBG Contact	Company Employee Record Type (conversion) = Individual
	OR Company Employee Record Type Value = IBG Contact	OR Company Employee Record Type Value = Individual

For example if you want to look at contacts for SPDR you need to add the filter: company employee record type value = IBG Contact.

Example:

The screenshot shows a filter configuration interface with three filters:

- 1 - Status (C)**: Status (C): is Active
- 2 - Email Invalid**: Email Invalid: true
- 3 - Company Employee Record Type Value**: Company Employee Record Type Value: is IBG Contact

Smart Campaign Setup

Smart lists are the mechanism to define 'who' for the actions taken in the flow step, while you are creating a smart campaign you need to define the people in Smart Filter section using different types of filters as per your business requirement.

To filter a smart list to show either SPDR or Institutional data, add your filters as follows:

	SPDR	Institutional
Leads only	Company Employee Record Type (conversion) = IBG Contact	Company Employee Record Type (conversion) = Individual
Contacts only	Company Employee Record Type Value = IBG Contact	Company Employee Record Type Value = Individual
Both leads & contacts	Company Employee Record Type (conversion) = IBG Contact OR Company Employee Record Type Value = IBG Contact	Company Employee Record Type (conversion) = Individual OR Company Employee Record Type Value = Individual

You should also include a preference filter - and ensure the preference relates to the content you are sending the individuals. This is to ensure that you are only sending content to individuals who are opted in to that particular preference.

For example if you need to send to the members of a SFDC campaign who are opted in to the Institutional 'Executive Content'

The screenshot displays a 'Smart List' configuration interface. At the top, there are tabs for 'Who is in my target list?', 'People', and 'Smart List'. Below the tabs is a 'List Actions' section with options for 'Use ALL filters', 'Collapse All', and 'Expand All'. The main area contains three filter rules, each with a green header and a white body:

- 1 - Member of SFDC Campaign**: Filtered by 'Person: in' and 'AQE Quarterly September 2018 -'.
- 2 - Unsubscribed**: Filtered by 'Unsubscribed: false'.
- 3 - Inst Executive Content**: Filtered by 'Inst Executive Content: is' and 'Subscribe'.