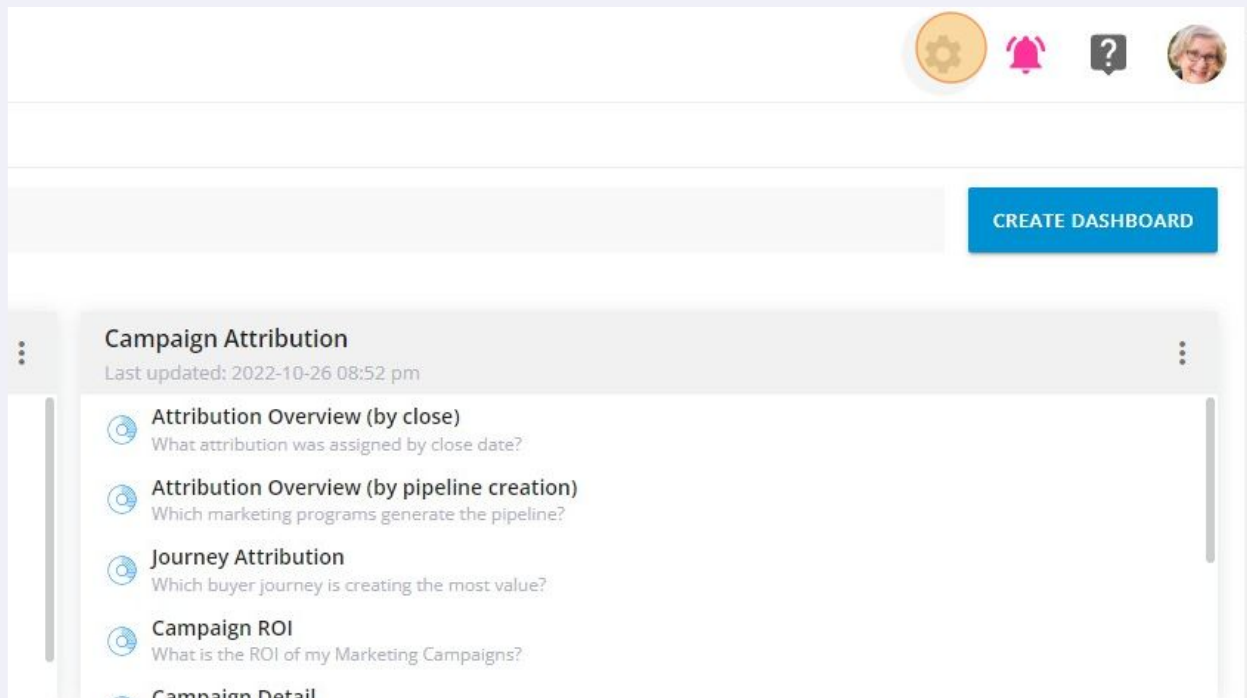


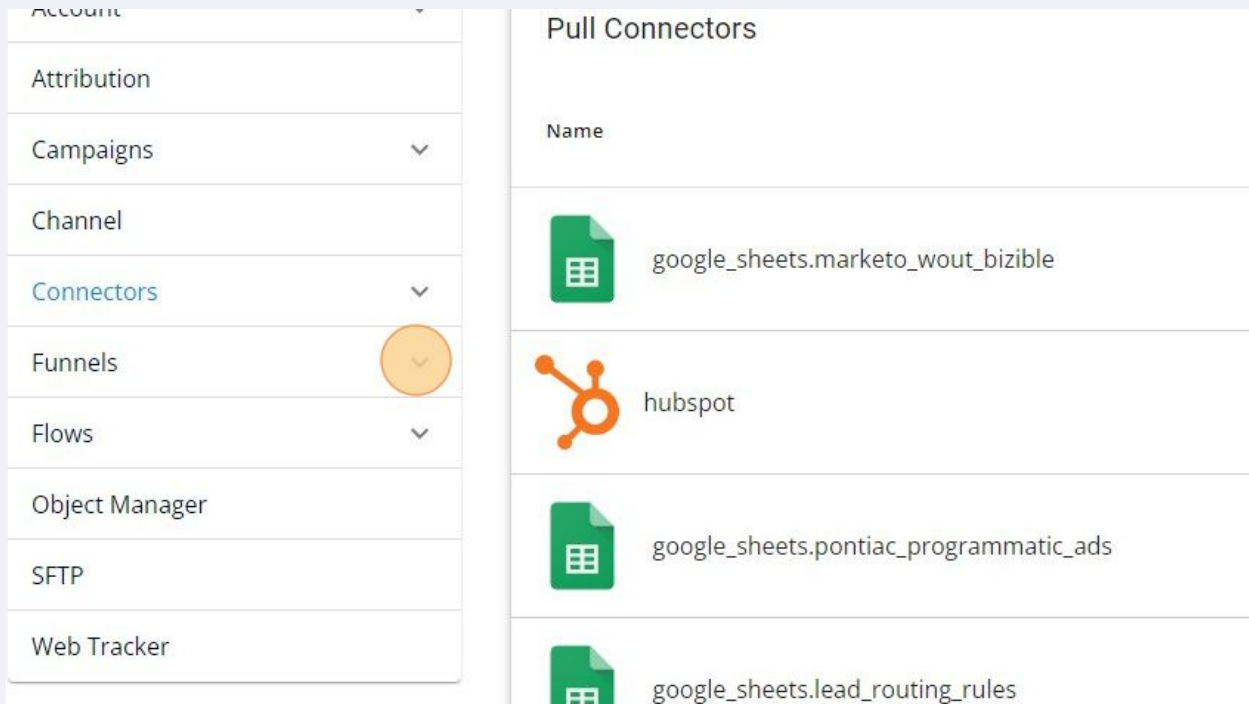
Calibermind Funnel Events Workflow

1 Navigate to <https://my.calibermind.com/analytics/dashboards>

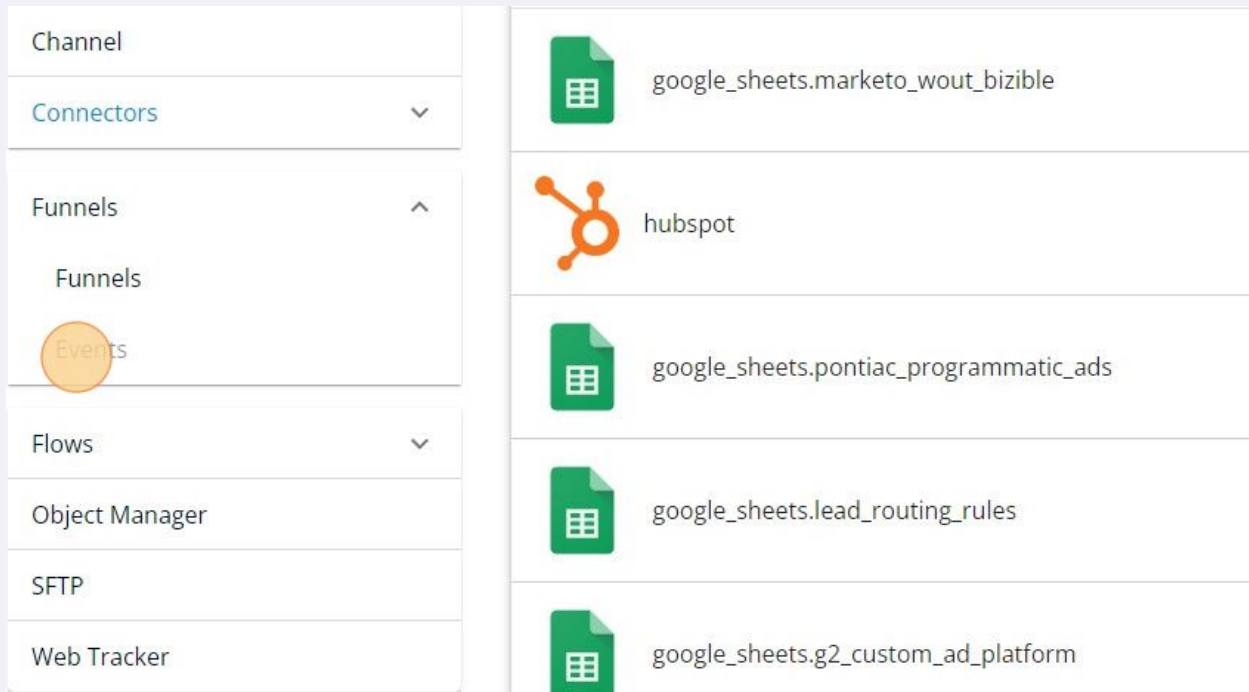
2 Click the Cog on the top right of the Main Menu.



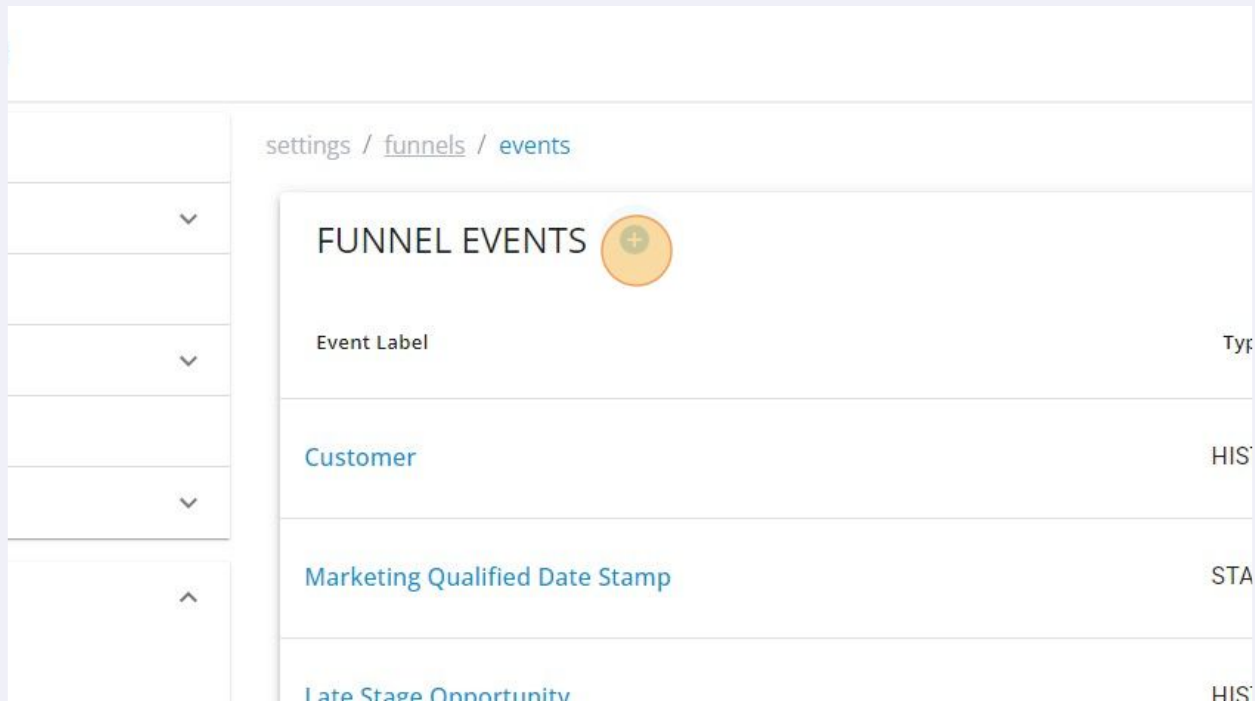
3 Click the arrow to the right of the Funnels dropdown list.



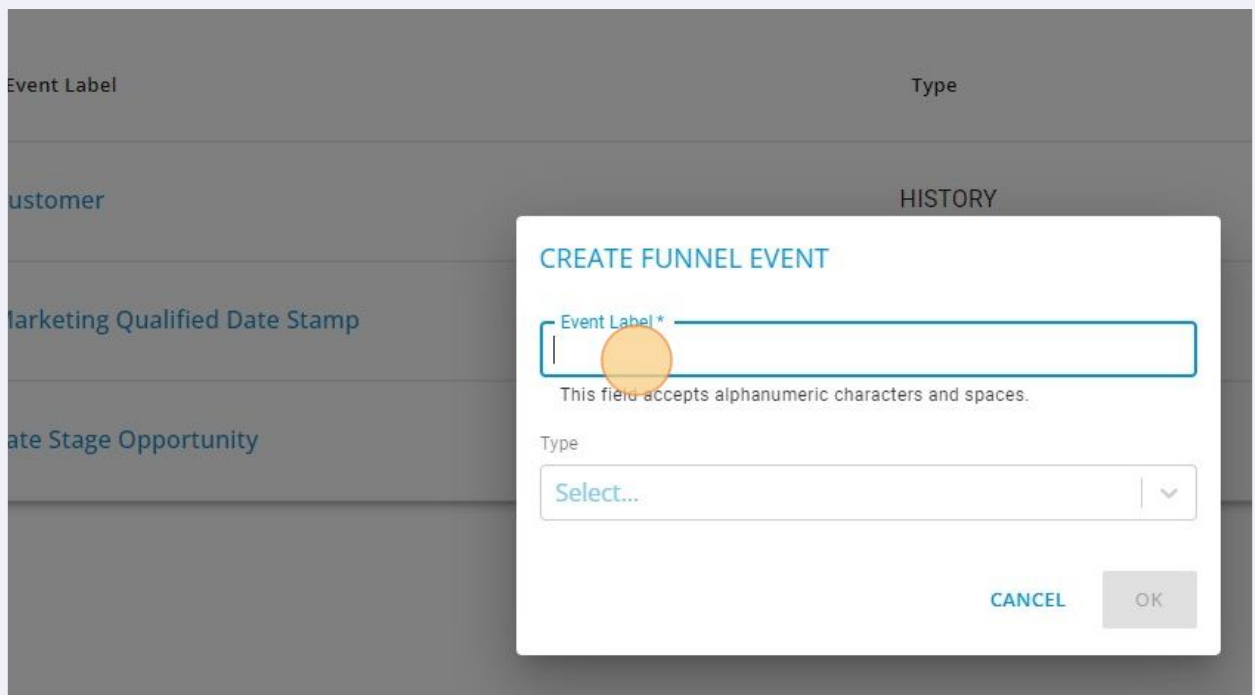
4 Click the "Events" menu selection.



5 Click the blue plus symbol to create a new Event.



6 Click this text field to give the Event a unique name.



7 In this example, we typed "Test History Event CBF."

8 Click the Type dropdown arrow to view the selection list.

The screenshot shows a 'CREATE FUNNEL EVENT' form overlaid on a 'HISTORY' table. The form has a text input field for 'Event Label *' containing 'Test History Event CBF'. Below it is a 'Type' dropdown menu with a 'Select...' placeholder and a downward arrow. The dropdown menu is open, showing two options: 'History' and 'Static'. The background table has a header 'HISTORY' and three rows of data with timestamps: '2022-10-21 06:50 PM', '2022-10-10 06:15 PM', and '2022-08-26 05:06 PM'. An orange circle highlights the dropdown arrow in the form.

HISTORY	2022-10-21 06:50 PM
	2022-10-10 06:15 PM
	2022-08-26 05:06 PM

CREATE FUNNEL EVENT

Event Label *
Test History Event CBF
This field accepts alphanumeric characters and spaces.

Type
Select...
History
Static

9 Click "History" from the selection list.

Marketing Qualified Date Stamp

Late Stage Opportunity

CREATE FUNNEL EVENT

Event Label *
Test History Event CBF
This field accepts alphanumeric characters and spaces.

Type
Select... | v

History

Static

10 Click the blue "OK" button.

CREATE FUNNEL EVENT

Event Label *
Test History Event CBF
This field accepts alphanumeric characters and spaces.

Type
History | v

CANCEL OK

2022-10-10 06:15 PM

2022-08-26 05:06 PM

11 Click the "OPPORTUNITY HISTORY TABLE" selection.

Settings / funnels / events / b9cea824-6fe5-4937-98e8-43eeb9201a58

Test History Event CBF

Create events using Salesforce history tables.

[LEAD HISTORY TABLE](#) [CONTACT HISTORY TABLE](#) [OPPORTUNITY HISTORY TABLE](#)

EVENT MARKER

Column Operator

Select... Select...

[SAVE](#)

12 Click the dropdown arrow to view the table list.

History Event CBF

events using Salesforce history tables.

[LEAD HISTORY TABLE](#) [CONTACT HISTORY TABLE](#) [OPPORTUNITY HISTORY TABLE](#)

EVENT MARKER

.. Operator

.. Select...

13 Select the desired list. In this example, we chose "Salesforce Probability."

LEAD HISTORY TABLE CONTACT HISTORY TABLE OPPORTUNITY HISTORY TABLE

EVENT MARKER

Column: Select... Operator: Select...

Tr Salesforce Stage Name

Salesforce Probability

14 Click here.

CBF

Opportunity history tables.

CONTACT HISTORY TABLE OPPORTUNITY HISTORY TABLE

Operator: Select... clear

15 Click "equals"

g Salesforce history tables.

CONTACT HISTORY TABLE OPPORTUNITY HISTORY TABLE

ability x | v Operator

Select...

- equals
- does not equal
- contains
- does not contain
- starts with
- does not start with
- ends with

16 Click the "Value" field.

Value *

Value

17 Type "40" for the probability range.

18 Click the blue "SAVE" button to complete your Event.

tings / funnels / events / b9cea824-6fe5-4937-98e8-43eeb9201a58

Test History Event CBF 

Create events using Salesforce history tables.

LEAD HISTORY TABLE CONTACT HISTORY TABLE OPPORTUNITY HISTORY TABLE

EVENT MARKER

Column

Operator

1 Salesforce Probability

x | v

equals

| v

