



April '19

Release Notes



tapReports



tapAnalytics

- Report Studio enhancements
 - Global Campaign filters
 - Dynamic Logos
 - Read-only mode for Business Unit Admins
 - Filters



tapOrders



tapWorkflow

- Additional details will now be displayed on page headers
- Ability to save values on cascaded fields
- Duplicate prevention on form and product fields
- Preferences for TapOrders & TapWorkflow will now be accessible through the TapAnalytics Preferences section
- Ability to select multiple business units when creating products
- Task IDs associated with comments
- Auto-assign logic updates

Data Sources

- API upgrades: The Trade Desk, Google My Business, Platform161
- Numerous new field and data view enhancements for Instagram Social, GroundTruth, AdRoll, Tubemogul, Yext Enhanced and Uberall.



TapReports/TapAnalytics

Report Studio Enhancements

Another month, another set of Report Studio enhancements.

Here's what's new for April.

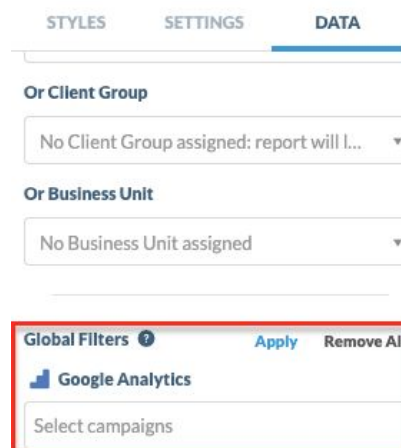
Global Campaign Filters

Let's get efficient!

Work smarter, not harder with the new Global Campaign Filters for The Report Studio. Instead of having to manually filter each widget one by one, you can now add a Global Campaign Filter that will apply to all widgets (with similar data sources) with a single click.

This filter is report based, so whatever you set will be applied to all the pages (widgets) of your report and it will work in conjunction with your existing filters.

You can find Global Filters inside the Data panel on the right.



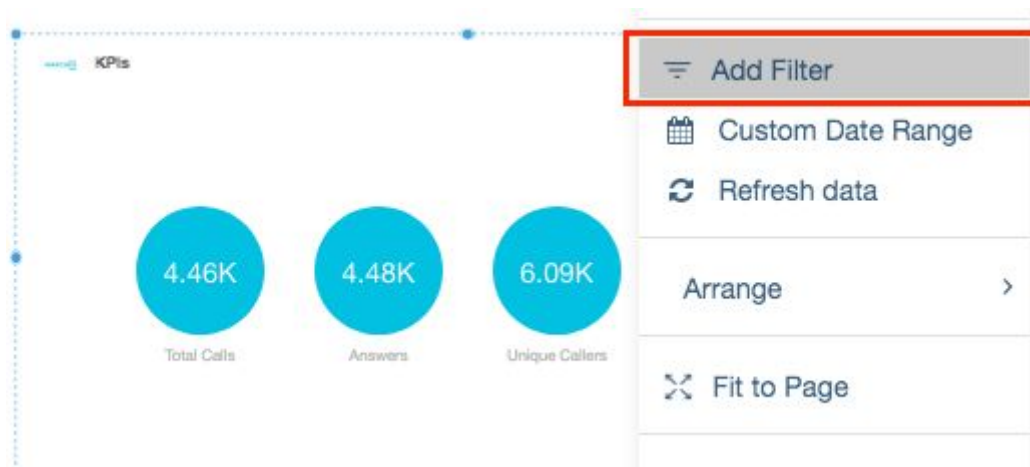
If you were to add any new widgets after applying the Global Filters, all the filtering will be automatically applied on your new widgets.



Filters

You will now be able to apply filters to data widgets inside The Report Studio.

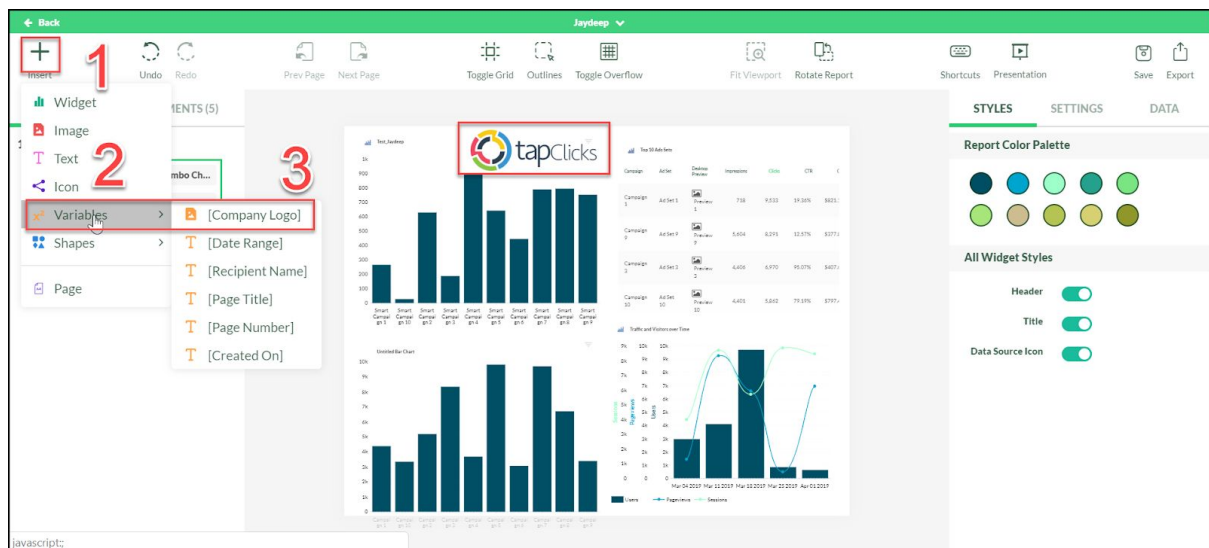
To add a filter, simply right click on a data widget and select Add Filter. This will bring up a Filter window, similar to the one displayed when adding filters to a dashboard widget.



Dynamic Logos

We've updated the Logo functionality of The Report Studio. Instead of just having access to the logo of your instance, you will now be able to insert logos for a specific Client, Client Group or Business Unit.

Inserting logos is very simple. Just click on the + icon at the top left of the menu inside Report Studio, select Variables and choose Company Logo.





Business Unit Read-Only Access

In the past, Business Unit Admins couldn't access reports inside The Report Studio that weren't assigned to them. It required them to copy the report in order to see the data.

With the April release, we have created a new read-only mode that will allow Business Unit Admins to access these reports with all the editing/customization options disabled.

Data Sources and Field Enhancements

- API upgrades: The Trade Desk, Google My Business, Platform161
- Numerous new field and data view enhancements for Instagram Social, GroundTruth, AdRoll, Tubemogul, Yext Enhanced and Uberall. [Learn more.](#)



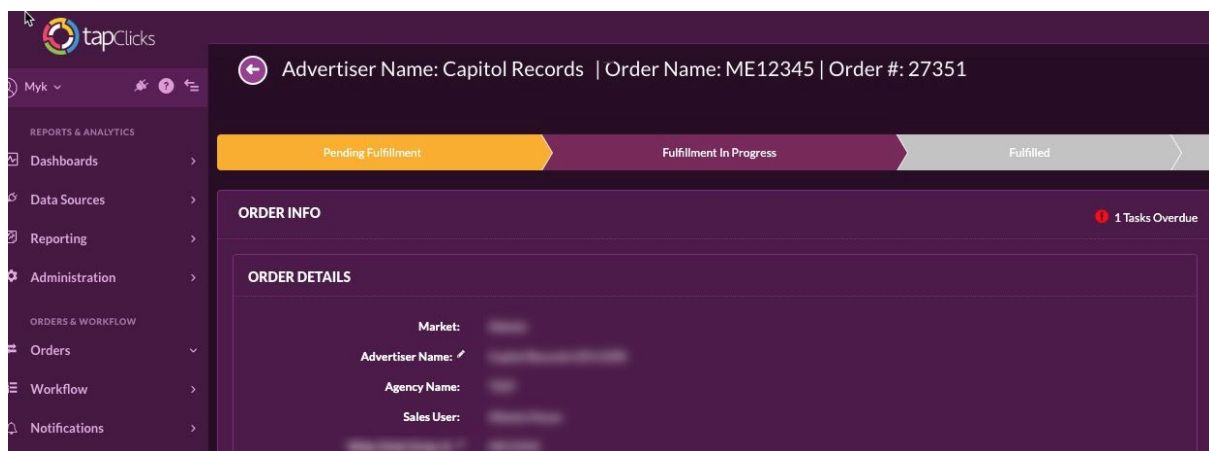
TapOrders/TapWorkflow

Additional details on page headers

To make it easier to see order and line item details at a glance we've added more information right into the header.

Order level details will show The Client, Order name as well as Order Number.

Line items and Task forms will show The Client, Order name, Product and Line IDs.



Ability to save values on cascaded fields

TapClicks support cascading field values from the Order level form to the Line forms. Moving forward, line level fields that are receiving cascaded data will be able to be overwrite-able from the line. These values entered in the line will be saved and will overwrite the order level value being sent down.

Duplicate prevention on form and product fields

The system will no longer support naming products or fields in the same form with duplicate system names.



Ability to select multiple business units when creating products

In the past, product forms used to only be able to be used either across all business units or for one specific business unit. Starting with the April release, product forms can now be permissioned to multiple Business Units.

This will be helpful when you have certain products that needed across more than one business unit, but not for all of them. You can set this option when creating or editing a new product.

The screenshot shows a dark-themed dialog box titled "Update Product". It contains several form fields: "Business Unit" is a multi-select dropdown with three items, each with a small "x" icon to remove it; "Product Name" is a text input field; "Product Category" is a dropdown menu showing "x2"; "Active" is a checked checkbox; "Bookable" is an unchecked checkbox; and "Service" is a dropdown menu. At the bottom right, there are two buttons: "OK" (orange) and "CANCEL" (yellow).

Task IDs associated with comments

When a comment is made on a Task, that comment will now have a Task ID associated with it at the line level. This will be helpful when you're looking at the details from the line level, you will be able to see what people are talking about and where.



Auto-assign logic update

We are happy to release two new auto-assign logics.

1. You can automatically assign to the account manager associated with the client by using the auto assign format “account manager”.
2. You can automatically assign tasks to the same user with the “user_id_X” syntax. You can do this by navigating Task Autom Assign section under Routing Rule Sets. “X” is the ID that will be associated with the user.