



June '19

Release Notes



TapClicks June Release is set to contain:

- Log In With Google
- Ability to Create Products
- Report Studio - Design Templates for Dashboard Exports
- New Connection Type for the Smart Connector - RedShift
- Advanced Fetch Settings for the Smart Connector

Data Sources

- Numerous new field and data view enhancements for Facebook Insights, Instagram, Google Ads, Google Ad Manager, DataXu, The Trade Desk and many more.



Log In with Google

In an effort to make it easier for you to access your TapClicks account, we're excited to announce the ability to Log In With Google.



Enabling this feature is very easy. Simply navigate to Administration → Preferences → Application and toggle the “Enable Google Login” option.

Branding Application Dashboards Templates Data Sources Support Links

SETTINGS

Application Name
Used in the page titles

Display Currency
Changes the currency symbol (from \$ to €, for example) next to currency amounts. No currency conversions are performed by the platform.

Timezone

EZ Login Link Expiration (hours)
This controls how long EZ Login links (which can be enabled on scheduled reports) are valid for.

Enable Google Login Yes No



Ability to Create Products

Some of our customers offer different products to their end-clients. In the June release we're launching a new feature that will not only allow you to create Products in TapReports/TapAnalytics, but also associate it with specific clients and sections in your dashboards. Using this new feature you can create dynamic dashboards that will show the right data to the right client without manual customization.

Actions	Name	Active
	PPC Lite	
	PPC Standard	

Figure: Products page

Here's an example:

Let's say a Marketing Agency has a dashboard that is used as a template for multiple clients. The dashboard is organized in a way where each section is used to report on a specific Product package. With this feature, the agency can now assign a section to a specific Product (ex: PPC Lite) and another section to a higher level product (ex: PPC Standard).

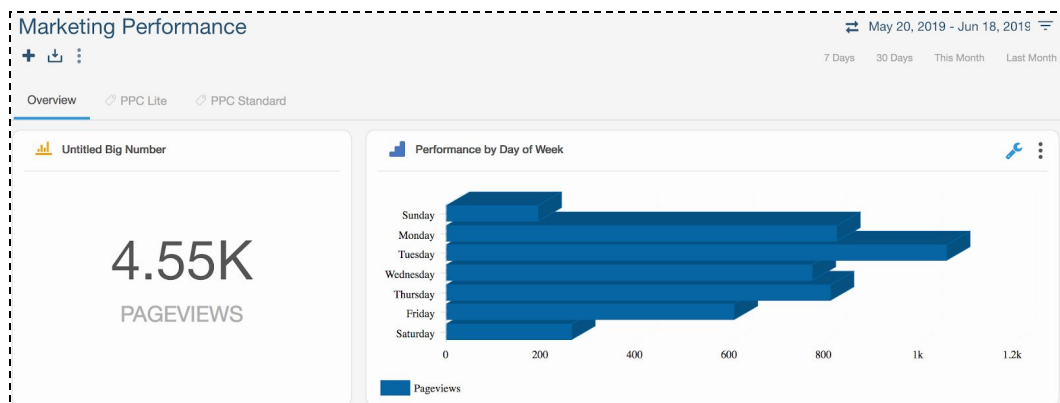


Figure: Dashboard and sections tied to different Products



The agency has a client '408 Dentist' who has paid for the PPC Lite product. In this case, we can assign this product to the client on the Client's page.

Edit 408 Dentist

GENERAL SETTINGS

Company name: 408 Dentist

Default Data profile: ANALYTICS_Profile

Products: PPC Lite x

Figure: 408 Dentist and Product assignment

When 408 Dentist views the dashboard, they will only see the sections that have not been assigned to any Product (Overview section), as well as the section assigned to their Products (PPC Lite). The PPC Standard section does not appear because this client is not assigned to that product.

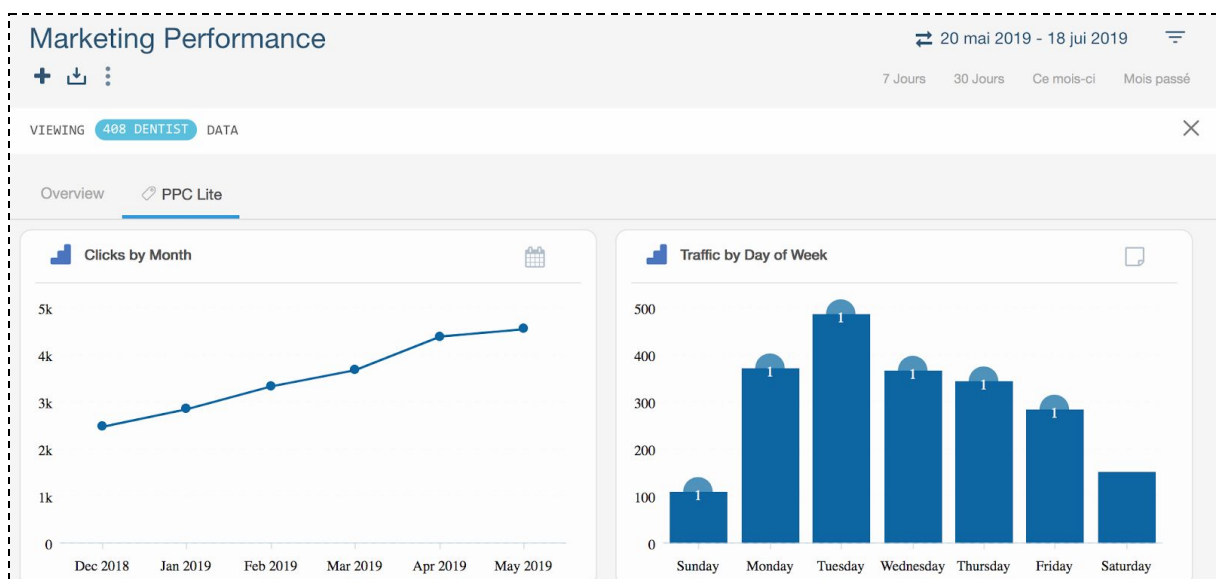


Figure: 408 Dentist viewing dashboard - appropriate sections assigned to their Products will show up



Report Studio - Design Templates for Dashboard Exports

We've added the ability for you to designate design reports as templates and make them available to dashboard exports. This allows you to easily apply a design template to an export from a dashboard.

To apply a design template to an export, simply go to a dashboard and select 'Export to Report Studio'.

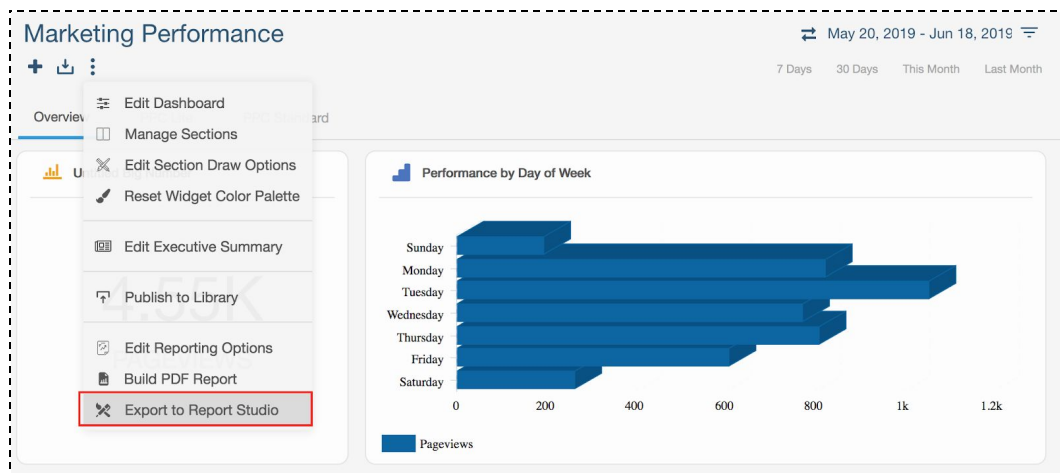


Figure: Export dashboard to Report Studio

On the next page, you'll see an option to choose a design template to apply to the export. User defined templates in the instance are shown first, with TapClicks predefined templates in the following section. You can also use the search tool to search for a specific template. If you'd like to add design later inside Report Studio, simply select 'or continue without a template'.

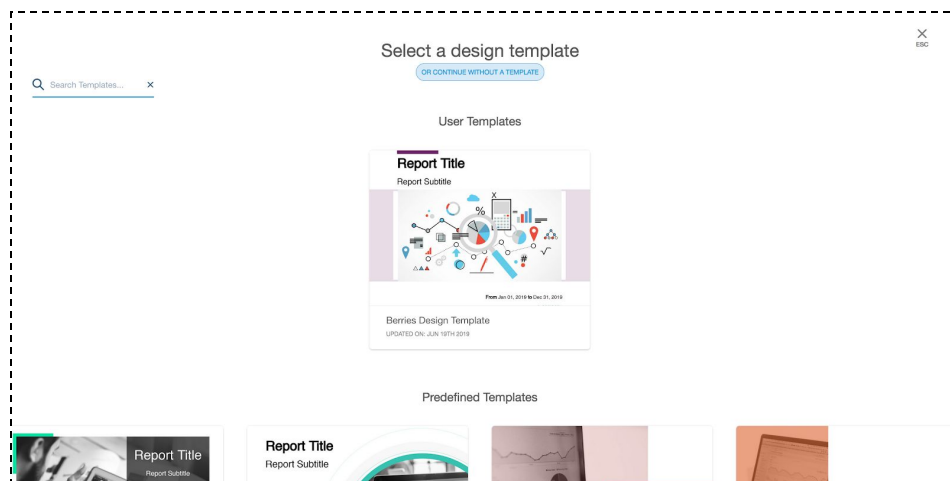


Figure: Apply a user defined or TapClicks template to your dashboard export to Report Studio



To designate a report as a design template, it must meet three requirements:

- It must not contain any widgets
- Contain only one intermediate page (not a cover page or back page)
- Cover page and back page are optional

To set a template as a design template, simply go to the report settings page and toggle the 'Use as Design Template' setting. As long as the requirements above are met, the system will display the design template in the gallery.

REPORT SETTINGS

Title: Berries Design Template

Business Unit: No Business Unit assigned

Use as Design Template:

In order for this report to be used as a Design Template:

- It must not contain any widgets
- Contain only one intermediate page (not a cover page or back page)
- Cover page and back page are optional

DATA PRE-FILTERING

By Client: No Client assigned: report will load data for all Clients.

By selecting a client, sample data will be turned off.

Author: Winnie Brown

Figure: Setting a report as a design template

Advanced Fetch Settings for the Smart Connector

With the June release, we're happy to provide you with more control over your data fetches for the Smart Connector. This is based on new "Advanced Fetch Settings" which provide two options: Fetch History and Fetch Delay.



Fetch History

This will control the number of days in the past that the Smart Connector will try to load data for your connection. By default, this is set to “3” Days and can be set anywhere from 0 to 30 days. By changing this, you will change how many days the system will look back in time for this information.

If your Smart Connector processes based on “Date”, then when the data fetches start, the system will look for and pick up any file names that have a ‘date’ in the name within the last 3 days. By changing this, you will change how many days the system will look back in time for this information.

If your Smart Connector processes based on “Last Modified”, then when the fetches start, the system will look for and pick up any files with a ‘last modified date’ in the last 3 days.


If your Smart Connector is a “Manual” connector type, this feature is not applicable. This is helpful if you are working with a data partner who may post or update the last X days of files on the hosting location at a time.


Fetch Delay


This will control the time to wait before looking for files to pick up and process. By default, this is set to “0” minutes and can be set up to 720 minutes (12 hours). This will put a delay on all fetches for this connector, even those that initiate using the “Update Dashboard” button.

This is helpful if you are working with a data partner who may not post files to the hosting location until say 9AM eastern. In this case, you could put a fetch delay of 3.5 hours (210 minutes) so the fetchers start after the files are posted.

Please note that this will add total time to processing of your Smart Connector fetches as a whole.

 **ADVANCED FETCH SETTINGS**

Fetch History  day(s)
Minimum value is 1 (day) and the maximum value is 30 (days).
Please avoid changing this value if you are unsure of the impact as this can have a significant impact on performance.
Contact your customer success manager for more information.

Fetch Delay  minute(s)
Minimum value is 0 (minutes) and the maximum value is 720 (minutes), which is 12 hours.



Data Sources and Field Enhancements

- Numerous new field and data view enhancements for Facebook Insights, Instagram, Google Ads, Google Ad Manager, DataXu, The Trade Desk and many more. [See the full list here.](#)