



March '19

Release Notes



tapReports



tapAnalytics

- Customizable Leads Dashboard with support for sections and all widget types
- Numerous Report Studio enhancements
- Enhanced search experience for TapClicks Libraries
- Group multiple Smart Connectors into a single Data Source (Beta)

Data Sources

- New: Pinterest Accounts
- API upgrades: Google Ad Manager, Kenshoo
- Numerous new field and data view enhancements for Bing Ads, Google Ads, Ubermedia, Recrue Outreach, DataXu, MatchCraft and more.



Customizable Leads Dashboard

We've heard your feedback and are happy to announce that with the March release you will now be able to add any type of widget to your Leads Dashboard.

We have also updated the technology under the hood to support the addition of sections and ability to completely customize your dashboard to tell your marketing story.



Figure: Leads Dashboard with sections and widgets

In addition, the Leads Dashboard will now come pre-loaded with 2 configured leads widgets on it. These widgets can now be deleted from the dashboard if you prefer to add your own custom leads widgets.

If you ever need to access these widgets again, feel free to grab them from the Widget Library by searching for the 'Leads' tag.

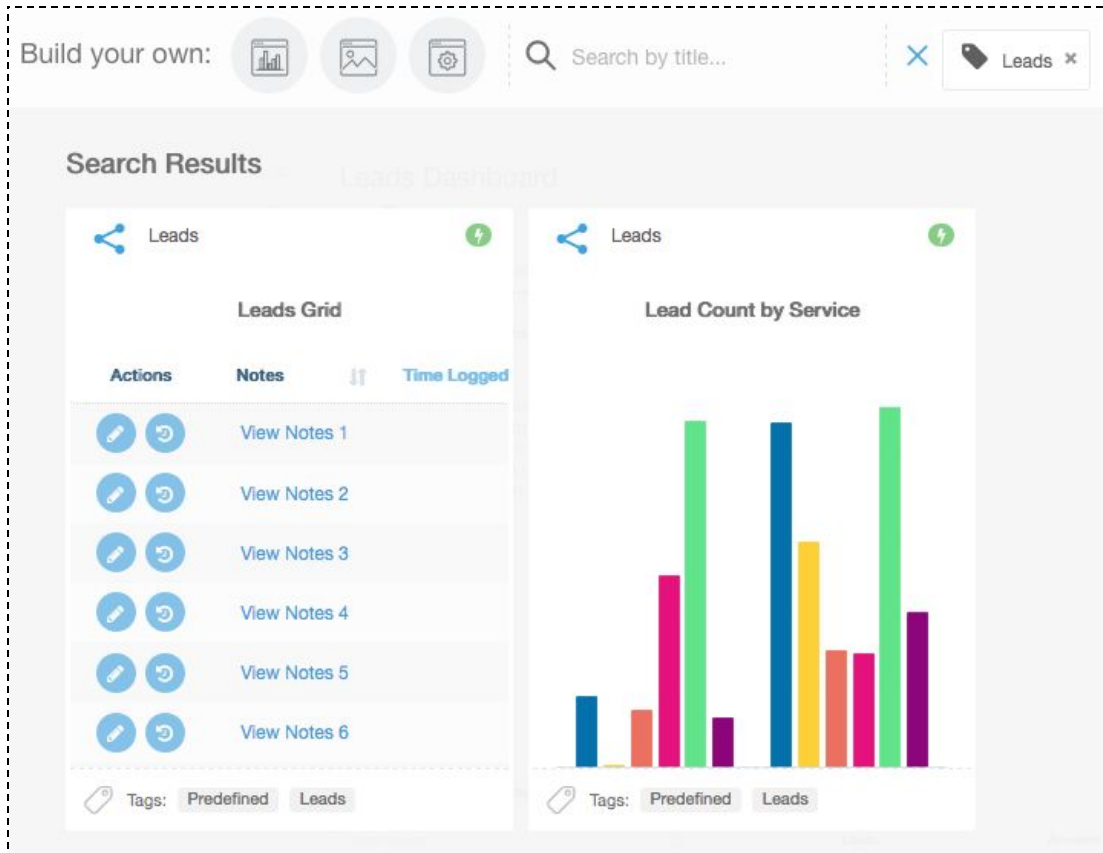


Figure: Predefined TapClicks Leads widgets in Widget Library

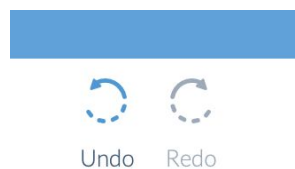
Report Studio Enhancements

Another month, another set of Report Studio improvements.

Here's what's new for March.

Ability to Undo and Redo

You can now easily undo and redo actions you take in the Report Studio by clicking on the Undo/Redo icons in the top left area of the screen. We have also added new keyboard shortcuts which can be triggered by pressing Command+Z (Undo) and Command+Shift+Z (Redo).





Calendar icon to indicate date range override on widgets

To maintain consistency with dashboard widgets, we have now added a calendar icon to data widgets in reports to indicate that there is a date override on the widget.

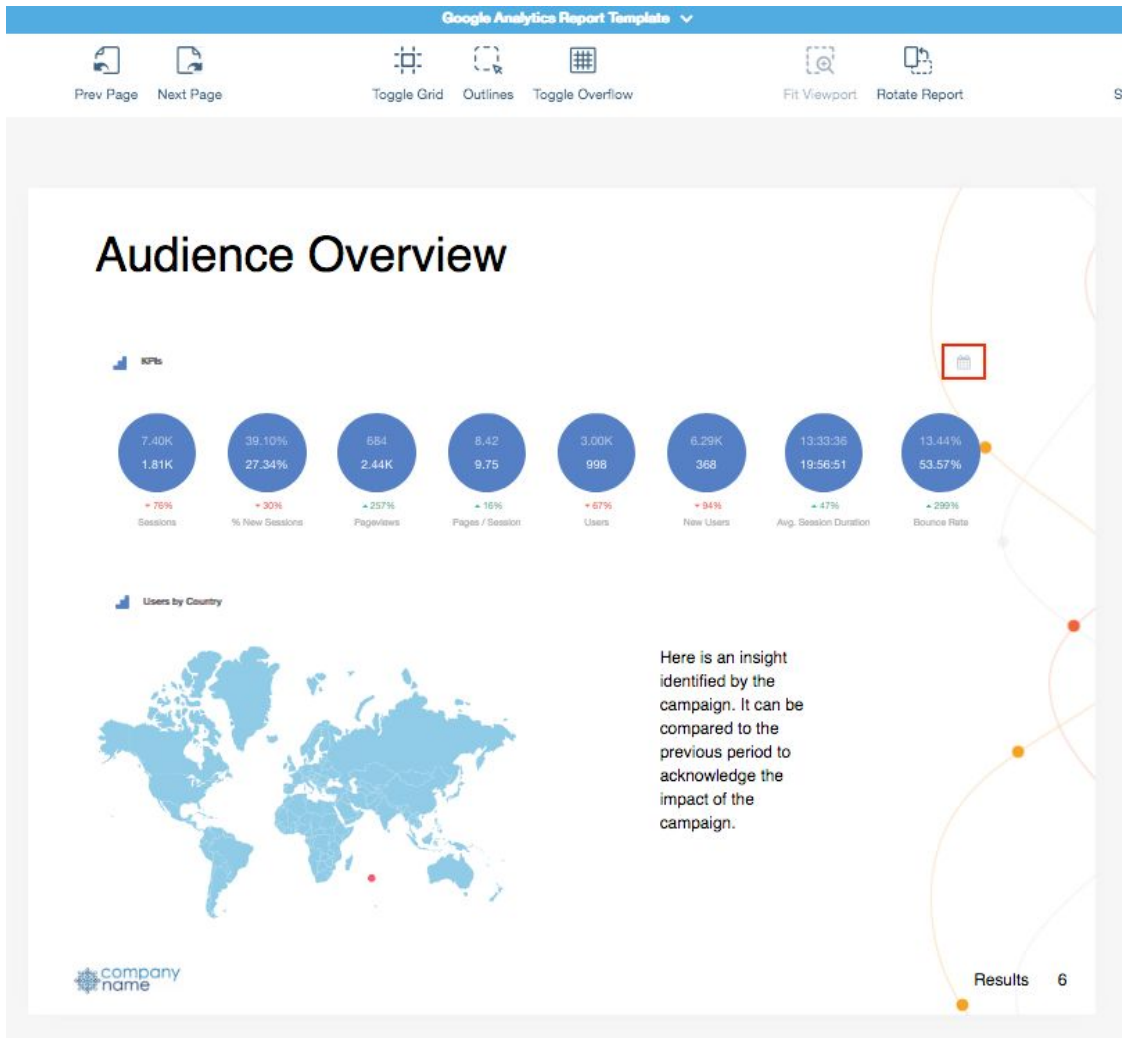


Figure: Calendar icon to indicate date range override on widget

Report Studio access for Business Unit Admins

We have updated role permissions to enable Business Unit Admins to access the Report Studio.

You can enable this setting by navigating to the Roles section and ticking the 'Report Studio Management' check-box.



← Edit BU Admin Role

GENERAL SETTINGS

Role name BU Admin Role

Role Association Business Unit Admin

ANALYTICS SETTINGS

Dashboard Management Business unit admins can manage dashboards.

Report Studio Management Business unit admins can manage report studio.

Figure: Role setting on Business Unit Admin for Report Studio access

Business Unit Admin access to reports in the Report Gallery follows the same logic as their access to dashboards and other parts of the platform.

- They can **view, clone, and export** reports that don't have a Business Unit assigned.
- They can **view, clone, export, and edit** reports that are assigned to their Business Unit.
- They can only **delete** reports that they created

By default, when a Business Unit Admin creates a new report, the report will automatically be assigned to the their Business Unit. Users with access to multiple Business Units can also use this field to **change** the Business Unit assignment for a report:

Marketing KPIs

Prev Page Next Page

Report Title Marketing KPIs

Business Unit PHILLY

Author AC Amanda Coon



Ability to customize multiple elements at once

Don't you hate having to manually click and customize each element in your reports one by one? Of course you do!

Well, those days are gone. You can now bulk update all the elements on a page at once.

Simply click and drag to highlight the elements on the canvas that you want to update and use the Styles panel to apply changes to everything that you selected.

The screenshot shows a dashboard with a 'Website Performance' report. The report includes three circular gauges for Sessions (1.27K, +205K), Registrations (2.95K, +497K), and Users (6.80K, +125K). Below these are three charts: 'Clicks Performance by Day of Week' (CTR: 0.59%, Impressions: 53.40%, Clicks: 46.01%), 'FB Ads - Performance by Month' (Bar chart showing clicks from Feb 17 to Mar 14, 2019), and 'FB Ads - Performance by Month' (Horizontal bar chart comparing clicks and impressions for Feb and Mar 2019). The 'Styles' panel on the right has tabs for 'STYLES', 'SETTINGS', and 'DATA'. The 'Background' section includes Color, Shadow (X, Y, Blur), and Opacity. The 'Borders' section includes Color, Width, Style (solid), Opacity, and Corner Radius. The 'Transformations' section includes Flip. The 'Widget Styles' section includes Header and Title, both with toggle switches.

Here are some of the cool things you can do in bulk:

- Drag all the elements to easily move them on the canvas
- Change the background color of all the elements
- Change the border style of the selected elements from a dashed line to a solid line

Pro Tip: Keep in mind that when multiple elements are selected, the settings in the Styles panel will only show options that are available across all selected elements. For example, if you select a data widget, dynamic logo, and textbox, the font styles won't show up because only the textbox has font style options, and the data widget/dynamic logo don't.



New keyboard shortcuts

We have updated our keyboard shortcuts to make it easier for you to use the new features we are adding.

Here's the full list of the keyboard shortcuts and don't forget that you access this list from inside the Report Studio by clicking on the 'Shortcuts' button.



Shortcuts

Keyboard Shortcuts



Basics

| | |
|-------------------------------------|-------------|
| Toggle grid | G |
| Toggle outlines | O |
| Toggle fit viewport (only Portrait) | L |
| Rotate report | R |
| Export options | E |
| Save report | Cmd S |
| Undo | Cmd Z |
| Redo | Cmd Shift Z |

Navigation

| | |
|--------------------------|-------|
| Go to next page | Cmd → |
| Go to previous page | Cmd ← |
| Focus on next element | Tab |
| Toggle presentation mode | P |

Add element

| | |
|--------|---|
| Widget | W |
| Image | M |
| Text | T |
| Icon | I |

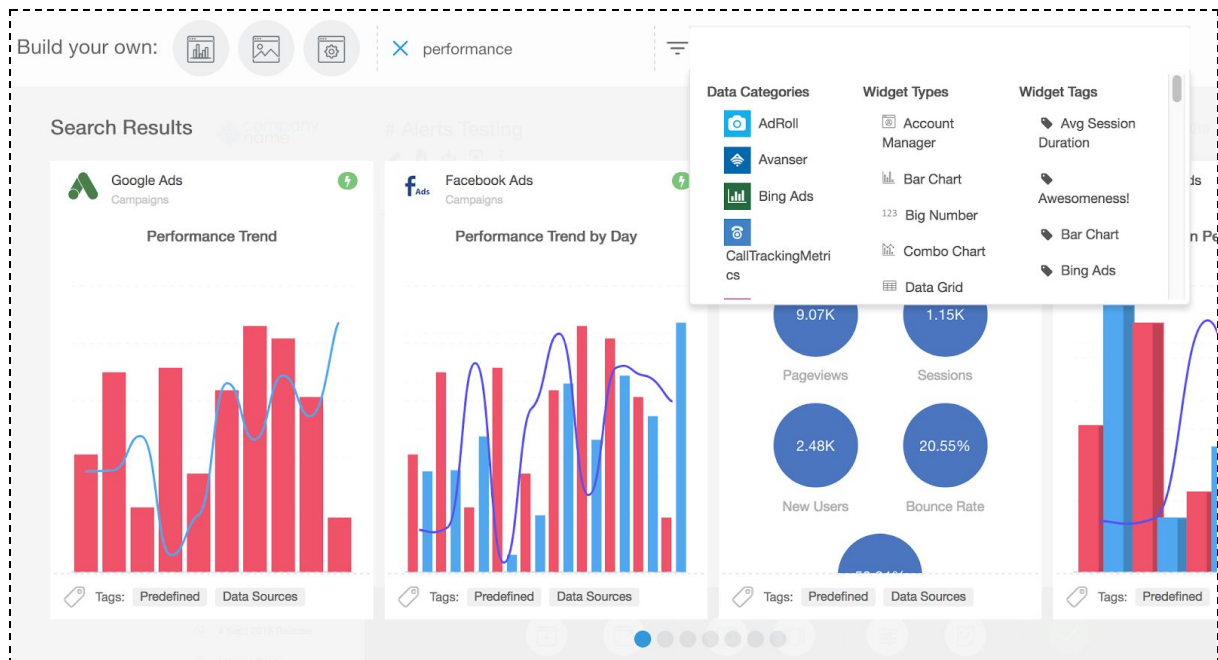
While an element is selected

| | |
|---------------|------------------------------|
| Move position | ↑ or ← or → or ↓ |
| Move faster | Shift + (↑ or ← or → or ↓) |
| Copy | Cmd C |
| Cut | Cmd X |
| Paste | Cmd V |
| Delete | Delete |



Enhanced Search Experience for TapClicks Libraries

We've expanded the search functionality in our libraries! This means you can now search for templates by typing in names to easily find a specific Widget / Section / Dashboard. We've also kept the existing filtering options so you can now use these search options with laser focus precision to find exactly what you're looking for.



Smart Connector Groupings (Beta)

Have you ever created multiple Smart Connectors and wanted a way to group them together into a single Data Source? Now, you can!

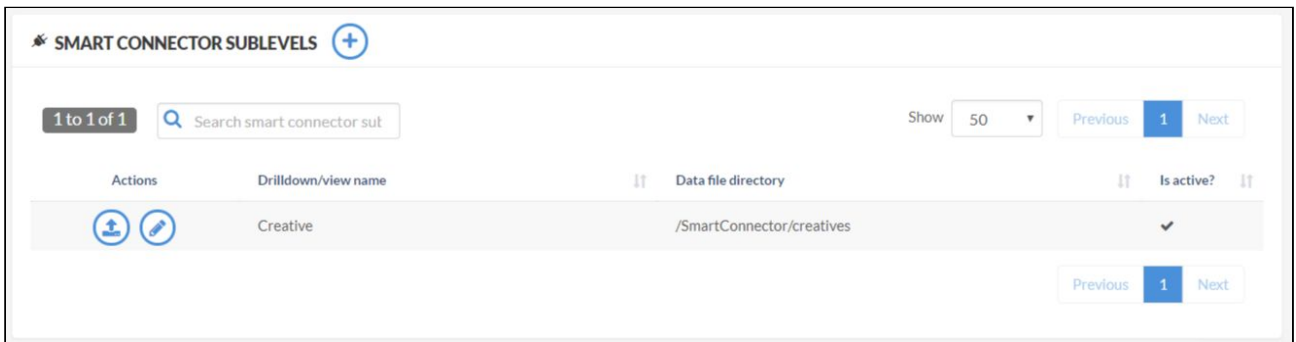
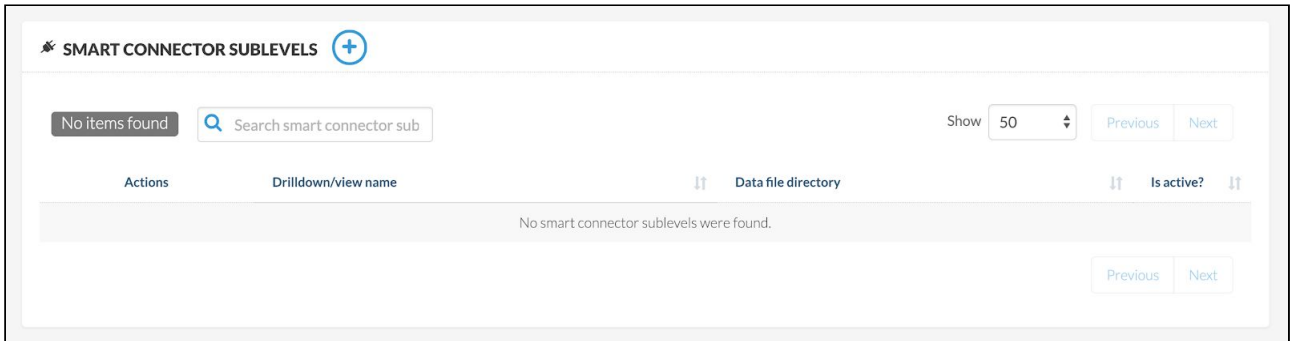
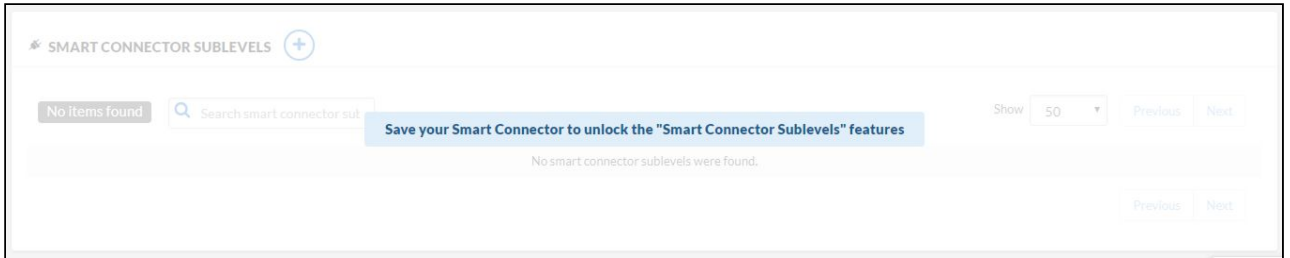
Since this feature is currently in Beta, the first thing you will need to do is reach out to your Custom Success Manager to get it enabled.

Here's how it works.

Create a Smart Connector as you typically would, and once your dashboard has been enabled to add child data levels, you'll see a new section in your Smart Connector Definition screen called 'Smart Connector Sub Levels'.



You can create more than one child data view off of the top level Smart Connector you've defined.



Click on the “(+)” button to create a new sub level section on this Smart Connector. The screen to define the new data view is nearly identical to the existing Smart Connector screen, with a few key differences.

Define the “Drilldown / View name” - this is what your data view will be called. This name should be singular and not plural - the system will automatically make it singular / plural as needed.

⚙️ DATA SOURCE AND VIEW SETTINGS

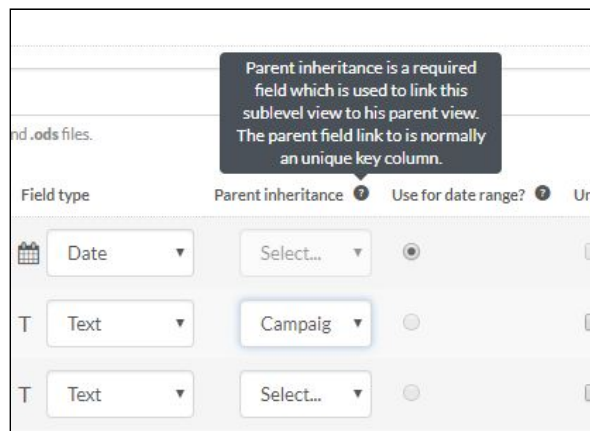
Drilldown / view name Name of the first drilldown (e.g. Campaign, Ad, Site, Keyword) (Note: do not pluralize)

Is active? ?



When you load your sample file, if there are fields that have been defined on the original Smart Connector as part of the Unique fields and they are exactly the same, those will be automatically defined. You can choose other unique key values as well for this new file.

Make sure to select your “Inheritance” fields - this will allow the system to bring fields down from the top level, as long as they are text type fields.



Your mapping field will be automatically assumed based on the Parent Smart Connector definition - make sure that you have the mapping field available in your sub level Smart Connectors as well, or the data will not be picked up.

Share your feedback

TapClicks is working on making ongoing enhancements to this feature - as you work with this new feature, we would love to hear your feedback! Feel free to share this with your Customer Success Manager.

Data Sources and Field Enhancements

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- API upgrades: Google Ad Manager, Kenshoo
- Numerous new field and data view enhancements for Bing Ads, Google Ads, Ubermedia, Recrue Outreach, DataXu, MatchCraft and more. [See the full list here.](#)