# October'19

## Release Notes

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Data Sources

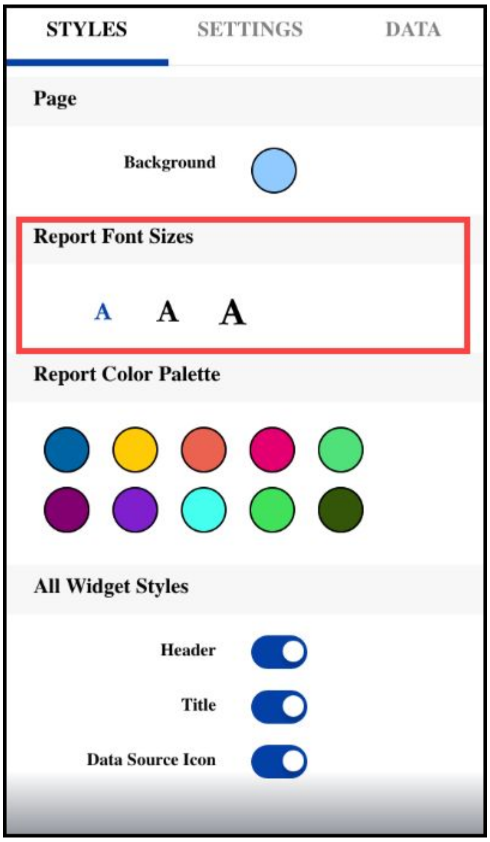
- New Connectors: Amazon Ads and MatchCraft
- “By Request Only” Connectors: InMarket, Phone Wagon and Centro: Basis
- API Upgrades: Facebook Ads and Bing Ads

# TapReports/TapAnalytics

## Font size options for Report studio

We’ve heard your feedback regarding the size of text when exporting your reports. We’re happy to announce that with the October release we are adding a new feature that will allow you to select a font size for your Report Studio reports.

This feature will allow you to adjust the font size without impacting the column headers. By default, the medium sized font will be selected.



## Multilevel Smart Connector

Source platforms usually don't have required fields on the Parent or Child level Data Source. To create cumulative Reports, customers are forced to request the Source platform to create a separate customer port or depend on the engineering team to create a connector for that particular Data Source.

To tackle this issue, TapClicks is introducing the Multilevel Smart Connector feature, which will allow users to inherit fields and pull data from a Parent and Child data view. Users can pull data in CSV, TSV and Excel format. You can also pull data housed in a database, which is helpful for some business units. Previously, Smart Connector was capable to pull data either from the Parent or Child level.

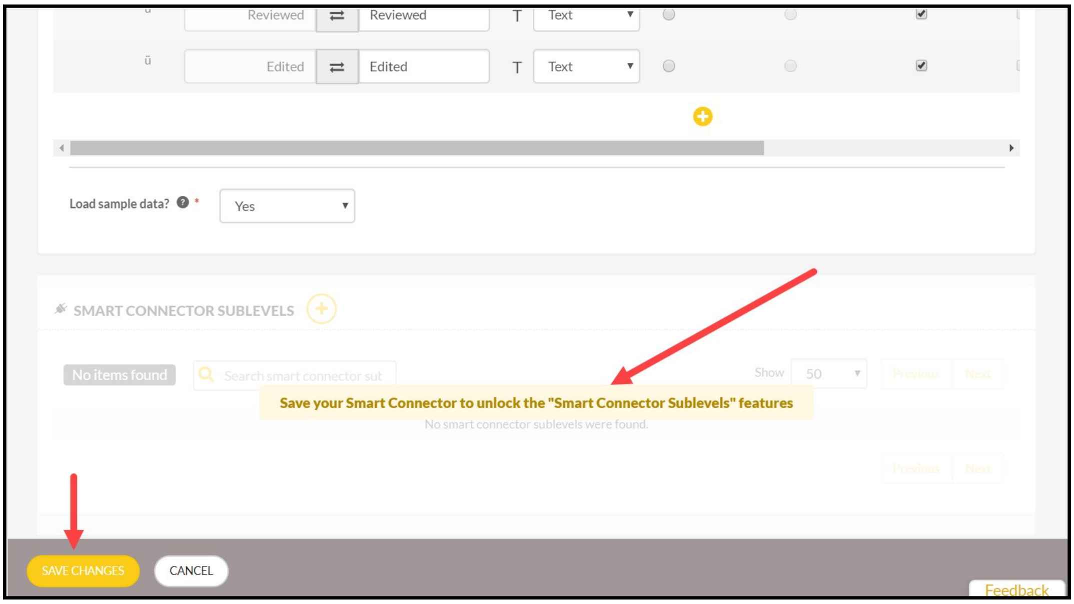
Once you pull data into TapClicks, you can create Widgets and present the data in any way you want. Please note that you can create multiple levels on existing Smart Connectors as well.

Please note that this feature is available for Pro and Elite users by request only. Reach out to your Customer Success Manager for more information and to get this feature enabled.

Here are the steps to follow to create a Multilevel Smart Connector:

1. Click Administration >> Data Settings >> Smart Connector in the left pane.
2. Click the  icon next to the header.
3. A New Smart Connector screen appears.
4. Fill in the required details, select & upload your Sample File and scroll down.

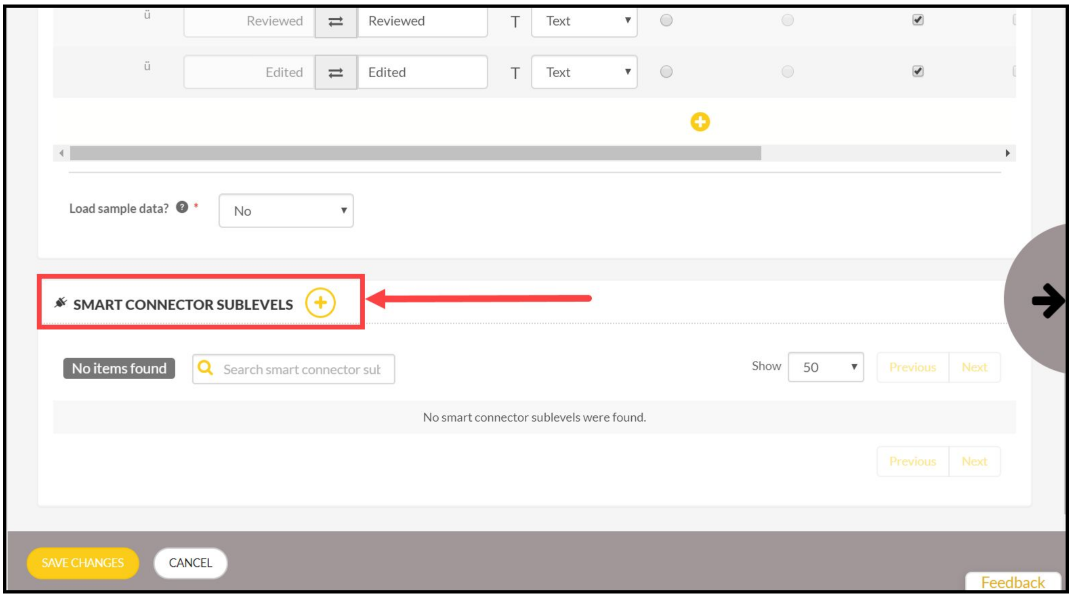
5. Save your Smart Connector... line appears on the screen.




6. Click Save Changes.

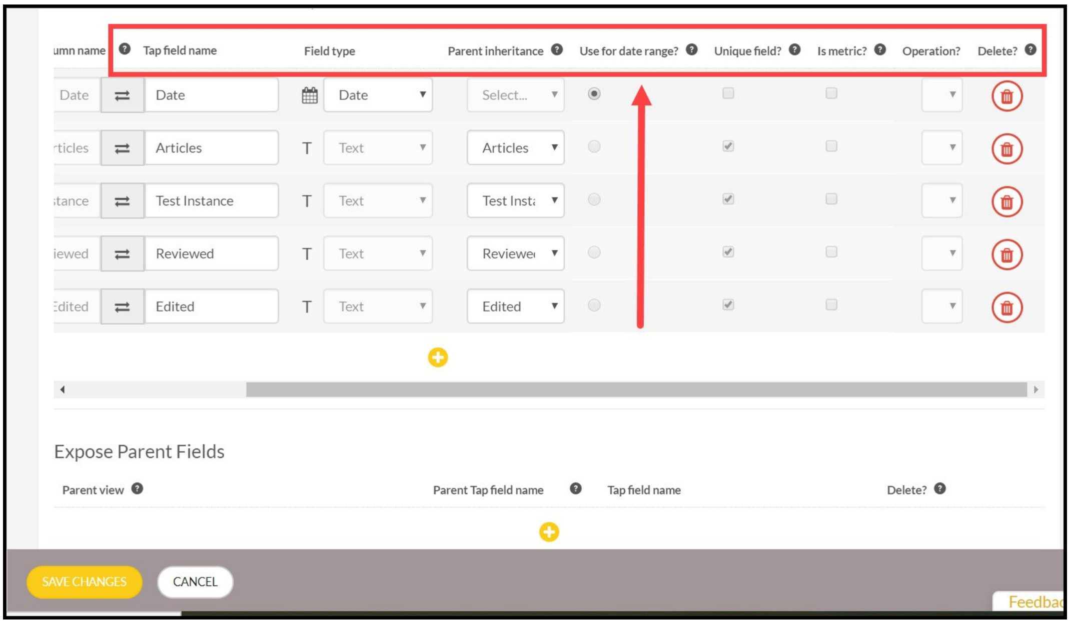
7. The screen refreshes. Scroll down to find Smart Connector Sublevels.

8. Click the  icon next to the header.

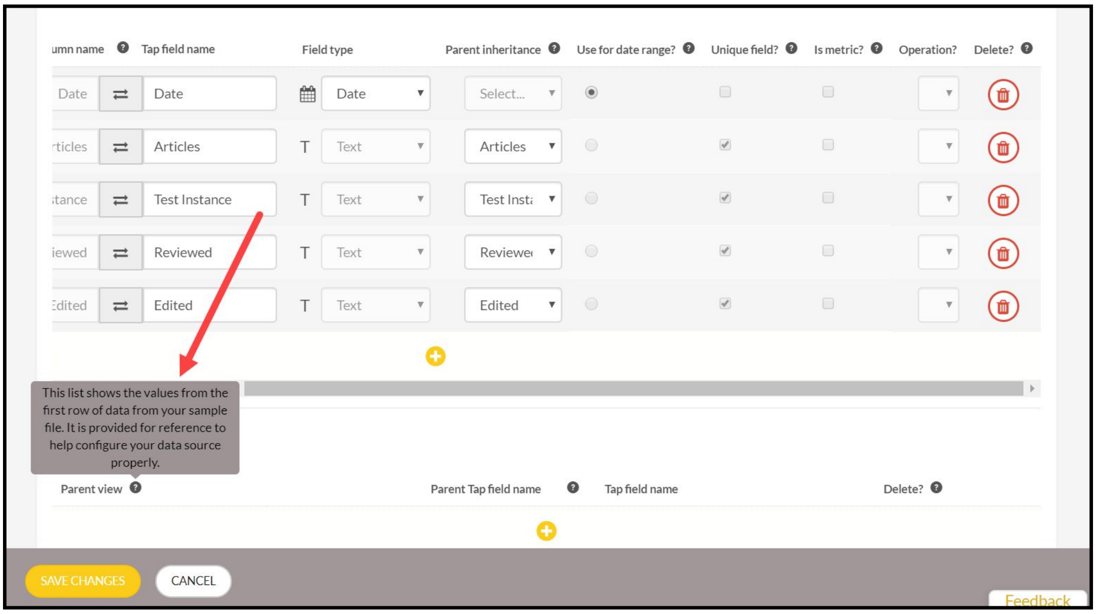



9. Select the Delivery Type, select & upload your Sample File and scroll down.

10. Select appropriate options from the available fields.




11. For detailed description any field, hover over the icon next to the option.




12. Click Save to save your Multilevel Smart Connector.

## Leads Management: Semi-real time data for Facebook Lead Ads and DialogTech

We're excited to announce support for semi-real time data for FaceBook Lead Ads and DialogTech. Why is this a big deal? Data will now flow into the Leads Management module within seconds instead of having to wait for the daily data fetch.

Here are some additional details for each service.

Facebook Lead Ads

When your Facebook Page gets Facebook Lead Ads, these form fills will appear in TapClicks within a few seconds of the form submit.

Please note that for using this feature, you need to:

- Have the Leads Management module enabled for your dashboard.
- Have the Facebook Ads Leads Data view enabled for your instance.
- Reauthenticate your Facebook Ads Connection.

Dialogtech

When your campaigns gets phone numbers from Dialogtech, those phone calls will appear in TapClicks within a few seconds of the call completion. There are additional configurations required on the Dialogtech system before you can use this feature.

If you don't have the Leads Management module enabled, please reach out to your Customer Success Manager or email us at customercare@tapclicks.com

## Data Sources and Field Enhancements

- New Connectors: Amazon Ads and MatchCraft
- API Upgrades: Facebook Ads and Bing Ads
- “By Request Only” Connectors: InMarket, Phone Wagon and Centro: Basis.

Hey, how come new connectors have to be requested to be enabled on my instance?

As TapClicks develops new code, we make every effort to handle every possible scenario when working with a partner data source.  Sometimes different configurations on accounts for those data sources can lead to unexpected results when we ask for data through the connectors.

By controlling the access to these data sources initially, we’re able to ensure work with you when you turn it on to see that things go smoothly and quickly react in the event that they do not.

Our prime directive is to ensure that your reporting experience has no bumps along the way and this approach to connectors will help us help you.

# TapOrders/TapWorkflow

## Google Ad Manager Enhancements

We're happy to announce a set of new enhancements for Google Ad Manager.

<u>Line Item Custom Ad Size Support</u>

We can now enter custom ad sizes in the TapClicks platform and push them over to the Google Ad Manager. The workflow remains the same as before, but users would now be able to enter a value that is not standard and save it as custom.

The new value will be indicated as such by adding a (Custom) next to the value. For example, if users enter 123x123, they would be able to save this value and it will be shown as 123x123 (Custom) in the list. Additionally, once a custom value is used in a Line Item, it will be stored in TapClicks and available in the list of standard values for repeated use.

To configure this field, the field name should be dfp_adsizes and the input type should be multiselect-custom. No other changes are required in the product configuration.

<u>Line Item Device Targeting - Manufacturer / Device (mobile apps only)</u>

Line Items can be targeted based on the manufacturer of mobile devices. Users can include or exclude specific devices for targeting from the available items in the list.

If the build already exists with field name as devices, it is not required to add a new configuration to it. If not, users need to add a field with devices as the Field name. Input type should also be devices.

Line Item Device Targeting - Device Capability

Users can now target Line Items based on mobile device capabilities such as MRAID v1 Or MRAID v2 by including or excluding specific capabilities from the available list.This can be configured by adding a field with devices as the Field name. Input type should also be device-capability.

Line Item Targeting - Mobile Application

Users can target claimed mobile apps from the Tap system now. This functionality is not built to claim apps from the Play store or the Apple Store. It has been built to target the already claimed apps. The apps that have already been claimed for the user account would be available in the Mobile App targeting block in TapClicks.

This can be configured in the product form by adding a field with a mobile-app as the Field name. The input type should also be mobile-app

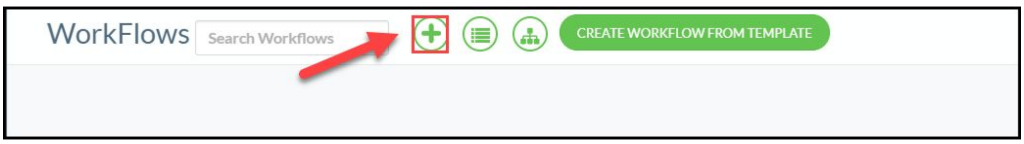
## Workflows Across Business Units

Currently, order workflows can only be assigned to a single business unit (BU). This works great for clients who need different workflows across their business, but can become challenging when managing multiple business units.

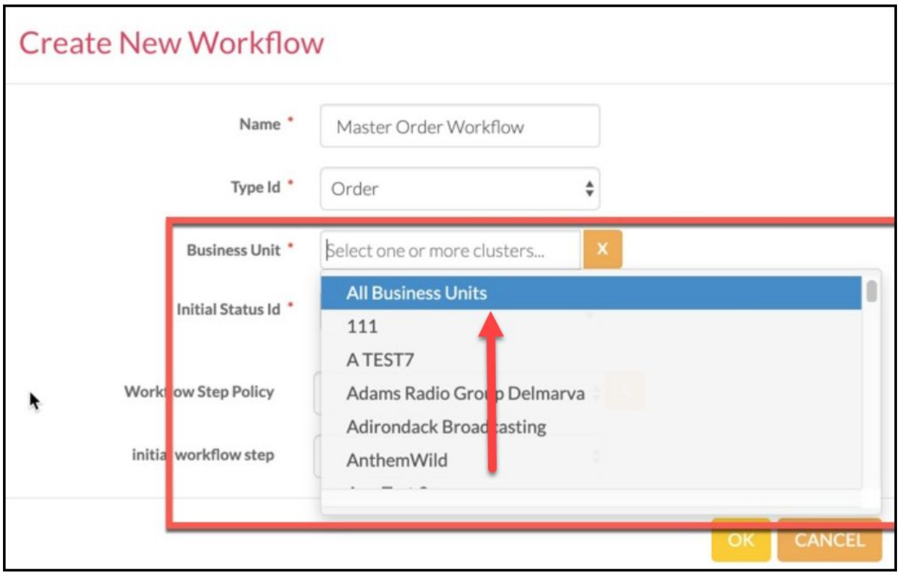
In an effort to make you more efficient we're excited to announce that you will now be able to have Workflows function across different business units.

To access this feature:

1. Navigate to Administration >> Workflows
2. Click the + sign on the top ribbon



3. In the Create New Workflow window, under Business Units dropdown, you can see the option All Business Units.




4. Select All Business Units option if you want to select all BUs across the workflow.

A few things to note:

- This functionality is available to Super Admin users only.
- This functionality applies only to Workflows for the time being. Order forms across BUs functionality is planned for the future.
- If you are creating your first workflow for a new instance and you want that Workflow to span all existing and future BUs, you can select the All Business Units option.
    - The All BU option will only work if creating the first workflow. There will be a pop-up error message if there is a BU already associated with another workflow.
- Currently, only individual BUs are available for selection. Group BUs will not show up for selection.