Marketing Overview Report

Table of Contents

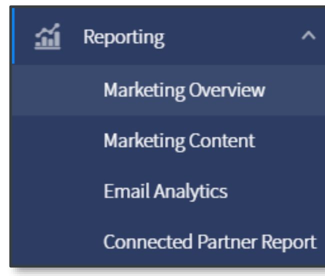
Introduction 1

Filters 1

Exporting 2

Columns 2

Introduction

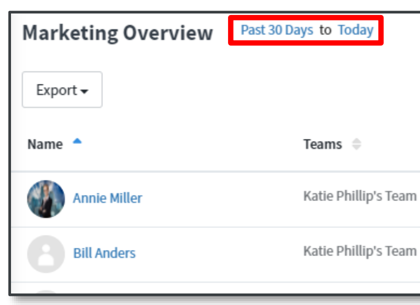


The Marketing Overview report is available to high-level users for the purpose of monitoring how much their team members are engaging with Total Expert and using its features. To view it, navigate to **Reporting → Marketing Overview**.

The report includes data in several categories that can help you understand which users are making good use of Total Expert features—and who may need more help to take full advantage. Click a user's name to view details about that user's content, sites, and leads or click the numbers in some columns to view details about what is counted. You can also export detailed information from the report.

The report also includes a Totals row at the bottom. This provides totals of everything currently showing in the table. This updates automatically as you add or remove columns, filter rows, or change the date range.

Filters



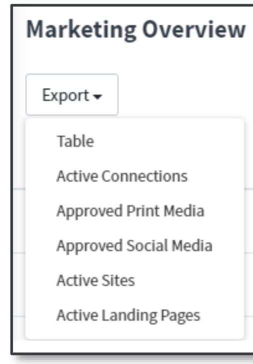
By default, the page shows data for the last 30 days. Click the start and end dates near the page title to select any range you want to query data from.

If you are designated as an admin user, all the users in your organization (except those designated as either admin or demo users) are listed. If you are not an admin user, only users who are members of teams you mange (again excluding those designated as either admin or demo users) are listed. You can filter those shown by typing in the **Search Users** box in the upper-right corner of the page. You can filter the results according to other criteria by clicking the blue **Filter** button. The available criteria are:

- **Date Range** – This has the same effect as the filter selectors near the page title.
- **Team** – Select any team or teams in your organization.
- **User Role** – Select any user role or roles configured for your organization.
- **User Status** – Select either All, Active, or Inactive. You can only select one at a time.

A user's record is listed if it matches all selected filter criteria. You can clear all the filters and restore the default list by clicking the orange **Reset** button in the upper-right corner.

Exporting



To output a comma-separated value (CSV) file for the visible information, click the **Export** button in the upper-left corner of the page. From the drop-down list, select one of the following options:

- **Table** – Exports the table as it is shown on the screen at that moment, respecting the active filters and column selections.
- **Active Connections** – Exports a detailed list of connections counted by the Connections Accepted column.
- **Approved Print Media** – Exports a detailed list of items counted by the Approved Print Media column.
- **Approved Social Media** – Exports a detailed list of items counted by the Approved Social Media column.
- **Active Sites** – Exports a a detailed list of items counted by the Active Sites column.
- **Active Landing Pages** – Exports a a detailed list of items counted by the Active Landing Pages column.

Except the Table option, if user A has a 2 in the applicable column and user B has 3, the exported CSV file will include 5 rows of data, including a column listing the user associated with each one.

Columns

To select which columns are shown in the report, click the **Column Visibility** button in the upper-right corner. From the drop-down list, select or deselect column names. The Reset button does not reset these selections. Below is a full listing of all columns available in the report. (Some columns may not apply to all users.) Default columns are marked with a red asterisk (*).

Note
Numerical columns only count results from the specified date range. The values update when you modify the range.

Column	Description
Name *	The name of the user. Hover over the name to see the user's contact information; click to see more detailed marketing data. You cannot hide this column.
Teams *	The names of all the teams the user belongs to. If the text does not fit, hover the mouse pointer over the text; the full text appears in a tooltip.
Cost Center *	The name of the Cost Center that the user is associated with.
Login Count *	The number of times the user has logged in to Total Expert.
Connections Sent *	The number of co-marketing partnership requests sent by the user.
Connections Accepted *	The number of co-marketing partnership requests sent by the user that were accepted by the recipient.
Contacts	The number of contacts created in the user's account.
Emails Sent *	The number of email messages sent from the user's account.
Approved Print Media *	The number of print content pieces the user has had approved.

Column	Description
Approved Social Media *	The number of social media pieces the user has had approved.
Active Sites *	The number of single property sites featuring or created by the user.
Active Landing Pages	The number of lead capture apps featuring or created by the user.
Print Downloads	The number of times the user downloaded a PDF of a print content piece from anywhere in Total Expert.
Print Orders	The number of orders the user has made for print content pieces from Total Expert.
General Merchandise Ordered	The number of orders the user has made from the General Merchandise feature.
Total Social Posts	The number of social media posts the user has created from Total Expert (if the user posts the same asset to Facebook and LinkedIn, this counts as 2 posts).