



# Standard Reports

Total Expert allows you to query various types of data relevant to your organization, marketing efforts, and use of the platform to generate reports in standard categories. You can pull these standard reports for yourself without needing to request them through customer support. This gives you the opportunity to drive internal results based on real data in important categories more responsively.

Standard reports are generated as comma-separated value (CSV) files. There are 2 types of standard reports:

- Weekly – Weekly reports are generated each Monday morning and include activity from a 7-day span starting the previous Monday.
- Monthly – Monthly reports are generated the 1<sup>st</sup> day of each month and include activity from every day in the previous calendar month.

## Note

To minimize load on the system, you cannot query a custom date range. To accomplish this, you can generate multiple reports covering consecutive intervals, manually combine the CSV files in Excel (or another editor), and remove entries for unwanted dates.

## Available Reports

There are many types of reports in the Standard Reports feature. Each of these is available as either a weekly report or a monthly report.

Report Name	Description
Activity	A general overview of how each user in the organization has interacted with the Total Expert platform during the interval.
Autocampaign	A list of which groups each user has on their auto campaigns. If a campaign has no groups assigned, it is not included in the report.
Do Not Contact	A list of contacts that were flagged as Do Not Contact during the interval.
Email	A list of emails sent during the interval along with relevant data (such as number of copies sent, successfully delivered, and opened).
Focusview	A list of outcomes selected by users on their focused views.
Funded Loans	A list of all borrowers and co-borrowers on loans that were funded during the interval.
Journey Lead Counts	A list of contacts who went through a journey during the interval and who are currently active on a journey at the end of the interval.
Journey Email by Month	Includes the same information as the Journey Email report below, plus additional columns for the month and year when the activity occurred.
Journey Email	A list of of journeys that sent emails during the interval, including relevant data (such as opens, clicks, bounces, and so on).
Lead Level Unsubscribe	A list of contacts who are unsubscribed from emails at either a domain or an organization level or flagged during an API transfer or data import.



Report Name	Description
Lead Statuses	A list of journeys with the number of distinct contacts in each status on those journeys.
Login	A list of each time a user logs in successfully, attempts to log in (but fails), or a user accesses another user's account to act on their behalf (as a loan officer assistant might do for a loan officer).
Sitepage	A list of sites created by users and related data (such as views and registrations). Sites created by co-marketers are not included in the report.
Sms	A list of SMS (text) messages sent and received by each user using Total Expert during the interval.
Tcpa Disclaimer	A list of users in the organization that shows whether or not each user has accepted the TCPA disclaimer in their account. A user must accept this disclaimer before Total Expert can send any SMS messages on their behalf.
Unsubscribe	A list of contacts who unsubscribed from emails during the interval at either a domain or an organization level.
User Level Preference	A list of contacts who indicated that they no longer want to receive marketing email from individual users and who those users are.
Customer Intelligence	A list of all customer intelligence alerts that were generated during the interval.

## Downloading Standard Reports

1. Navigate to **Reporting** → **Standard Reports**.
2. Depending on your needs, click either the **Weekly Reports** or **Monthly Reports** tab at the top of the page.
3. Click the report selection field below the tabs.

### Note

This field lists “All Reports” by default. If you do not make a selection, or if you clear all selections, all reports available in the drop-down list will be treated as selected. If you want all the reports for a given time period, use this option.

4. In the drop-down list that expands, select 1 or more reports that you want to download.
  - When a report is selected, its name in the list turns blue and a check mark appears on the right side of the list. Your selections are summarized in the field above the list.
  - You can deselect a report by clicking its name again or by clicking the small **x** next to its name in the field above the list.
5. Click the date range selection field on the right side of the page.
6. In the drop-down list that expands, select 1 or more intervals that you want to retrieve data for.
  - The most recently completed interval is selected by default, but you can change or add to this selection.
  - When an interval is selected, its name in the list turns blue and a check mark appears on the right side of the list. Your selections are summarized in the field above the list.
  - You can deselect an interval by clicking it again or by clicking the small **x** next to its name in the field above the list.
  - Data ranges are not available for any time prior to calendar year 2021.



- Each time you change the selection, the main list on the page updates to reflect the combination of report type(s) and time period(s) selected.
  - If more than 10 report types are selected, use the pagination buttons below the table to see all the rows.



- Each row represents 1 report type, whose name is listed in the Report Name column.
- The Week Range (or Month Range) column lists all the selected intervals in each row.
- The CSV Files/Report column shows the total number of reports for that row.

### Note

This generates a report for each combination of selected report and time interval. For example, if you select both Monthly Activity Report and Monthly Email Report and both March and February, you will download a total of 4 monthly reports.

7. Click the checkboxes for any rows whose reports you are ready to download. You can select any combination of the displayed rows.

### Tip

Click the checkbox in the header row to select all the checkboxes at once.

8. Click the **download** button to the right of the interval selection field. This button becomes active and turns blue when at least 1 row has been checked.



When you click the download button, a confirmation message appears at the top of the screen, and a zip file begins to download according to your browser's download settings. A zip file is created, even if you are only downloading 1 report. Each report in the zip file is contained in an individual CSV file.

### Tip

The zip file is always called `report.zip`, but individual CSV files are named with the interval type, report type, and the specific report's date, as in: `Weekly Activity Report 04-19-2021.csv`. Extract the files and store them in a location with a standard naming convention.

### Note

If you want to download both weekly reports and monthly reports, you must perform the above steps twice (once each from the Weekly Reports tab and the Monthly Reports tab), so you will have 2 zip files. You cannot download both interval types in the same operation.