

TapClicks IQM Reports Connector User Documentation

Introduction

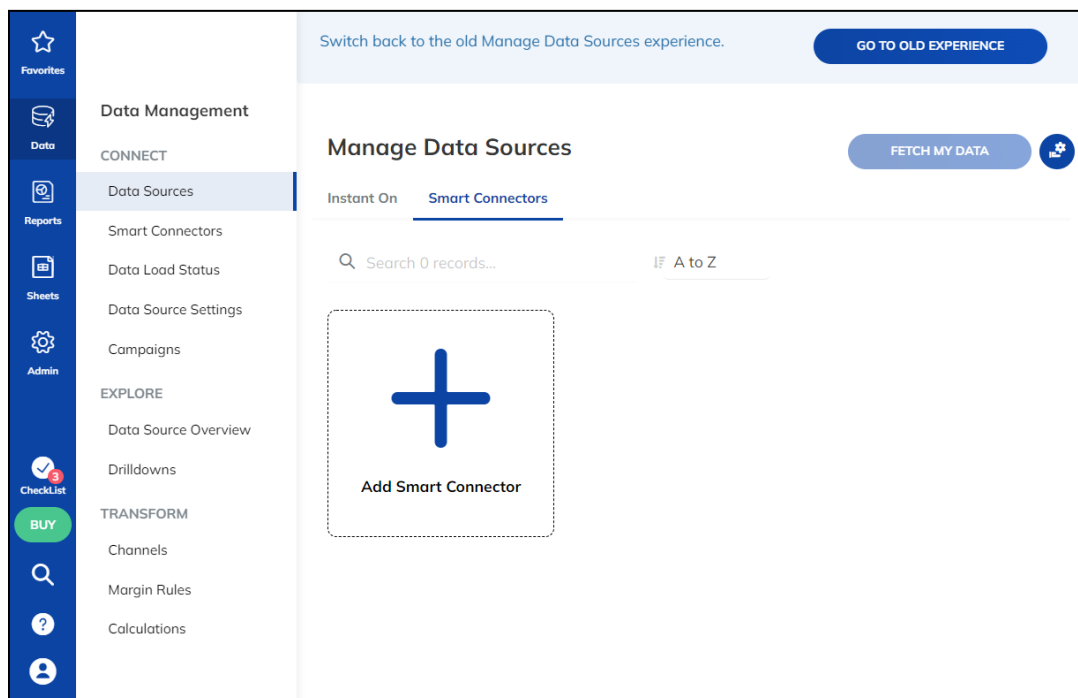
TapClicks is an online business intelligence platform that offers data analytics and reporting for digital advertising companies. It allows users to import marketing data from a range of sources to create a unified view of campaign performance across platforms. The IQM Reports Smart Connector allows users to integrate IQM ad-serving data into their TapClicks dashboards for visualization and analysis.

Prerequisites

To use the IQM Reports connector on TapClicks, you must have a TapClicks account and an IQM account. See <https://www.tapclicks.com/> for information on gaining access to TapClicks.

Setup

1. Log into your TapClicks instance. From the **Data Management** sidebar, select **Data Sources**. In the **Smart Connectors** tab, select **Add Smart Connector**.



- From the Smart Connector list, select IQM Reports. This will open the Import Wizard, which allows for configuration of the connector. Under **Manage Connection**, ensure that **TapDirect** is selected in the **Delivery type** dropdown. Then, select the **OAuth 2.0** option from the **Authorization** dropdown and click **Authenticate**.

Is active? ☒

[GO TO MANAGE DATA SOURCES](#)

MANAGE CONNECTION

Delivery type [?]

Authorization

[✓ AUTHENTICATE](#)

Note: Smart Connectors are optimized to process volumes of data of less than 100,000 data points per day, and less than 10,000,000 data points total. If your use case requires more data, please reach out to your Customer Success Manager.

ADDITIONAL FEATURES

Use Quick Mapping? [?] ☐ Map this SC to a single client? [?] ☐ Use Email Service? [?] ☐

Use Geo Data? [?] ☐ Use JSON file config? [?] ☒

[TAPDIRECT \(BETA\)](#)

- Log into your IQM account in the popup window. You will be prompted to provide OAuth permission for TapClicks to access your IQM data; click **Approve**, then **Authorize**.

https://app.iqm.vote/oauth/authorize?redirect_uri=https%3A%2F%2Fim.tapclick... — □ ×

app.iqm.vote/oauth/authorize?redirect_uri=https%3A%2F%2Fim.tapclicks.com%2Foau...

OAuth Approval

Do you authorize "iqmcorp.tapclicks.com" to access your protected resources?

• scope.write: ☒ Approve ☐ Deny

[Authorize](#)

4. The IQM Reports connector is paginated, meaning that, whenever it fetches data, it fetches one “page” of ad-serving records at a time until there is no more data to fetch. To ensure that all of your ad-serving data is fetched, scroll to the **Paginate Records** dropdown under the **TAPDIRECT (BETA)** section and select **Incremental**.

The screenshot shows a configuration interface for the TAPDIRECT (BETA) connector. At the top, there is a field for 'ending_date' with a date format 'dd-mm-yyyy' and a dropdown arrow. Below this is a horizontal scrollbar. On the left, the text 'Paginate Records' is visible. A dropdown menu is open, showing three options: 'No pagination needed', 'Incremental' (which is highlighted in blue), and 'Next page URL'. At the bottom of the interface, there is a section labeled 'JSON CONFIG' with a small icon to its left.

Two new environment variables will be added. Change the **starting_offset** value to **1**.

The screenshot shows the 'Reserved Environment Variables' configuration interface. It features a table with two columns: 'Key' and 'Value'. The table contains four rows of variables: 'starting_date' with value 'dd-mm-yyyy', 'ending_date' with value 'dd-mm-yyyy', 'starting_offset' with value '1', and 'increment_offset_by' with value '1'. Each row has a dropdown arrow to its right. Below the table is a horizontal scrollbar. On the left, the text 'Paginate Records' is visible. Below this, a dropdown menu is open, showing the option 'Incremental' with a dropdown arrow.

Then, add the line **"page_number": "{{starting_offset}}"** to the **Body** section so that the JSON reads as follows:

```
{
  "request_type": "daily",
  "total_agg": false,
  "dateRange": {
    "startDate": "{{starting_date}}",
    "endDate": "{{ending_date}}"
  },
  "timezone": {
    "label": "America/New York",
    "value": "America/New_York",
    "id": 371
  },
  "dimension": {
    "filter": {
      "value": "campaign",
      "label": "Campaigns"
    }
  },
  "page_number": "{{starting_offset}}"
}
```

5. Scroll down to the **Data Fields** section to view information about the data fields that will be imported by the connector, such as their types, display names, and whether they are performance metrics. Fields can be renamed in the **Tap field name** column—this will affect the label for that field in reports and dashboards. The **Operation?** column determines the aggregation type (sum, average, etc) for each field, determining how it is displayed in the **Data > Data Source Overview** page.

TapClicks attempts to automatically infer the data types of the fields imported from the connector. Some fields are best interpreted as different data types; to ensure that data is displayed correctly, make the following changes.

- Change the **Field type** of the rows CTR, VCR, winRate, and CVR to **Percent**. This changes the aggregation type of those fields to “Average”, and causes them to be displayed as percentages.
- Set the **Field type** of bidImpressions to **Number**.
- Set the **Field type** of maxBid, budgetDay (Daily Budget), budgetTotal, spent (Total Spent), dataCost, mediaSpent, mappingSpent, mappingDataCost, eCPM, eCPC, eCPV, eCPI, and eCPCV to **Currency**. This will cause these values to be displayed as dollar amounts in the Data Source Overview and elsewhere.
- For the “cost per” metrics, set the **Operation?** column to **Average**.

- Set audioVideoViewed to have a **Field type** of **Duration**. The audioVideoViewed field is analogous to the Hours Viewed column in the IQM Reports app, and is displayed as seconds.
- Note that the startTime and endTime fields are the Start Date and End Date of the campaign, expressed as Unix timestamps.

DATA FIELDS

Upload Sample Method: Dynamic

Load sample based on the last: 360 days LOAD DATA FIELDS

SHOW RESPONSE

Sample file column name	Tap field name	Field type	Use for mapping?	Use for date range?	Unique field?
CTR	Ctr	.00 Decimal	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
date	Date	<div>Select... Number Decimal Percent Currency Text Date Duration Link Call Recording URL Thumbnail Click to View URL</div>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>
VCR	Vcr	%	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
budgetDay	Budgetday	\$	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
reach	Reach	#	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
budgetPacing	Budgetpacing	T	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
dataCost	Datacost	\$ Currency	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

SAVE CHANGES CANCEL

For more information on smart connector data fields, see the documentation at <https://support.tapclicks.com/hc/en-us/articles/360040411553-Smart-Connector-How-to-Map-Data-Fields>.

6. To start using the IQM Reports data, click on **Save Changes**. The connector will, by default, fetch data each day at 6 AM Eastern Standard Time (EST). To change the time at which TapClicks fetches data, set a **Fetch Delay** in **Advanced Fetch Settings**.

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.

7. To assign campaigns to advertising clients, **Go To Manage Data Sources**. (Or, navigate to **Data > Data Sources** in the sidebar and click on the **Smart Connectors** tab, then **Assign** on the newly-created connector.) This will take you to the assignment page. Assigning campaigns to advertising clients allows you to filter data by client when creating dashboards and track campaign performance per client across different advertising platforms. The lookback period of the IQM Reports connector is 6 months, so campaigns with ad-serving data within the past 6 months will appear in this list.

The screenshot shows the 'Manage Data Sources' interface. On the left is a sidebar with a menu including Favorites, Data, Reports, Sheets, Admin, and Checklist. The 'Data Sources' item under the 'Data' section is highlighted with a red arrow. The main content area has a header with a link to 'Switch back to the old Manage Data Sources experience.' and a 'GO TO OLD EXPERIENCE' button. Below the header, the 'Smart Connectors' tab is selected. A search bar shows 'Search 5 records...' and a sort dropdown is set to 'A to Z'. A large blue plus sign in a dashed box is labeled 'Add Smart Connector'. To the right, a card for 'IQM Reports 1234' is shown with the IQM logo. A red arrow points down to the 'ASSIGN' button at the bottom of this card.

IQM Reports 1234 Last update 3 hours ago [REFRESH LIST](#)

Assign a campaign to their respective clients
You can uncollapse a campaign to reveal the existing campaigns and assign them on a more granular level.

Search 4 records... 50 per page 1 < >

show All Selected (0)

	Account Name	Account Connection	Date First Seen	Assignment Status
<input type="checkbox"/>	Adx - India Discrepancy Check - Video		07/14/2022	Unassigned
<input type="checkbox"/>	Campaign for warning message		07/14/2022	Unassigned
<input type="checkbox"/>			07/14/2022	Unassigned

[SAVE](#)

Assign to

- + New Client
- Demo Advertiser Client
- In-N-Out Burger
- Barnes & Noble
- IQM Client Stockton

- Since data is retrieved from the IQM Reports connector every 24 hours, it may take up to a day for TapClicks to pull data. You can view information about daily data imports for all connectors in the **Data > Data Load Status** page. The **Daily Data Load Status** page shows which connectors pulled data and when; the **Connection Status** page displays the status of each connector and whether any errors have occurred.

Data Load Status Time is displayed in Pacific Standard Time (America/Los_Angeles)

Needs Attention **Daily Data Load Status** Connection Status Assignment Status Notifications

Today's Data Load

The table below will show if your data fetches are currently in progress or if they have completed. It does not show if the connections were successful or if they failed. To see the status of each connection, please see the *Connection Status* tab or *Needs Attention* tab.

Search 3 records... 10 per page 1 < >

Data Source	Status	Start Time	Completion Time	Duration
IQM Reports 2 4 assignments	✓	Jul 14, 2022 3:42 AM	Jul 14, 2022 3:42 AM	00:00:25

Recent Daily Loads

Search 1 records... 10 per page 1 < >

Daily Fetch Date	Start Time	Completion Time	Duration	Completed
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Guide Me

Once TapClicks has imported the data from the connector, you can use your IQM ad-serving data along with your other imported connector data in reports and dashboards to create a convenient unified view of your campaigns across platforms. Note that the IQM Reports connector uses the America/New York timezone for dates when returning daily ad-serving data. For more information on these TapClicks features, see the documentation at <https://support.tapclicks.com/hc/en-us/categories/360004326254-How-to-Guides>.