

# Zapier IQM Reports Integration Documentation

## Introduction

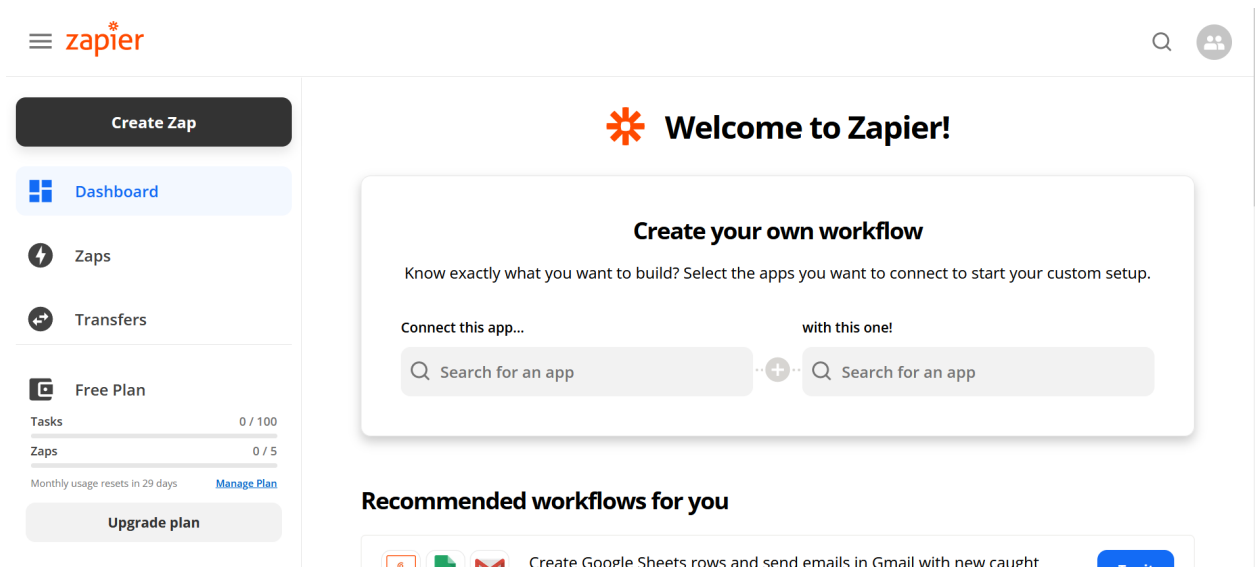
Zapier is an online tool used to connect and automate workflows between web applications. The **IQM Reports** app at <https://zapier.com/apps/iqm-reports/integrations> provides a convenient way to use Zapier to connect your IQM ad-serving data to other web applications via automated workflows, or **Zaps**. A Zap allows you to chain web apps—such as Slack, Google Calendar, and Dropbox—together, so that when a specified event occurs in an app, Zapier performs a workflow that passes information between and executes actions in one or more other apps. For instance, you might set up a Zap that triggers when your company makes a post on Twitter and automatically shares the post on a company Slack channel.

## Prerequisites

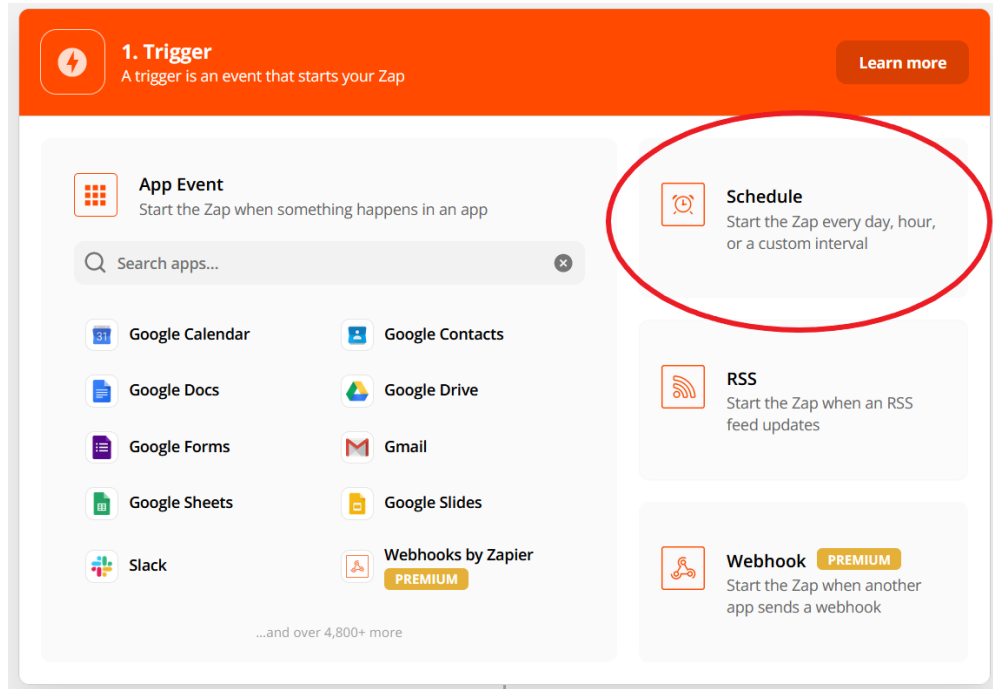
Before using the IQM Reports Zapier app, you must have an IQM account and a Zapier account.

## Setup

1. To set up a Zap workflow, first go to <https://zapier.com/> and log in using your Zapier account.
2. From the Dashboard, click on **Create Zap**. This will open the Zap editor.



3. In the **Trigger** section of the Zap, select the Zap's trigger—the app and event that will cause the workflow to execute. In this example, we'll use the **Schedule by Zapier** trigger, which causes the Zap to run at specific time intervals.



For more information about Zap triggers, see <https://zapier.com/help/create/basics/set-up-your-zap-trigger>.

4. Fill out the **Trigger** section to specify trigger settings. For the **Schedule by Zapier** trigger, you will be asked to specify the time interval in which to periodically run the Zap workflow, as well as the specific date or time to run the Zap.

The screenshot shows the 'Trigger' section of a Zap workflow setup. At the top, it says 'Trigger' and '1. Every Day'. Below this is a section titled 'Choose app & event' which contains a dropdown menu showing 'Schedule by Zapier' with a 'Change' link to its right. Underneath, the 'Trigger Event' is set to 'Every Day' with a '(required)' label and an 'INSTANT' button. A note states 'This is what starts the Zap.' At the bottom is a large blue 'Continue' button.



When done filling out each page of the Trigger, click Continue to move to the next section or page.

This screenshot shows the same 'Trigger' setup screen but with more options visible. The 'Choose app & event' section is collapsed, showing a green checkmark. Below it is the 'Set up trigger' section. It includes a 'Trigger on weekends?' dropdown set to 'yes' with the question 'Should this Zap trigger on Saturday and Sunday?'. Below that is a 'Time of Day' dropdown set to 'Midnight' with a '(required)' label. A note explains that triggers are relative to 'timezone settings' and defaults to UTC, with a 'Note' about specifying times with 'Custom Value' in formats like 'hh:mm aa', 'hh:mm', or 'hhhh'. At the bottom of this section is a 'Refresh fields' button. A large blue 'Continue' button is at the very bottom.



5. Test the trigger by clicking the **Test Trigger** button. This allows Zapier to verify that the trigger is working correctly.


When you test the trigger, the output fields of the trigger are shown. In the below example, the Schedule by Zapier trigger outputs the values **id**, **pretty\_date**, **pretty\_time**, and so forth. The output fields of the trigger step can be mapped into the input fields of any subsequent action in the Zap, allowing the Zap to pass data between apps.


Provided that the trigger works correctly, the option to **Continue** will appear. Click this button to continue to the next section of the Zap.




Trigger  
**1. Every Day**



 

▼ Choose app & event 

▼ Set up trigger 

### Test trigger

**We found a day!**  
This day was found in your Schedule by Zapier account. [Learn more about test data.](#)

 Day A 

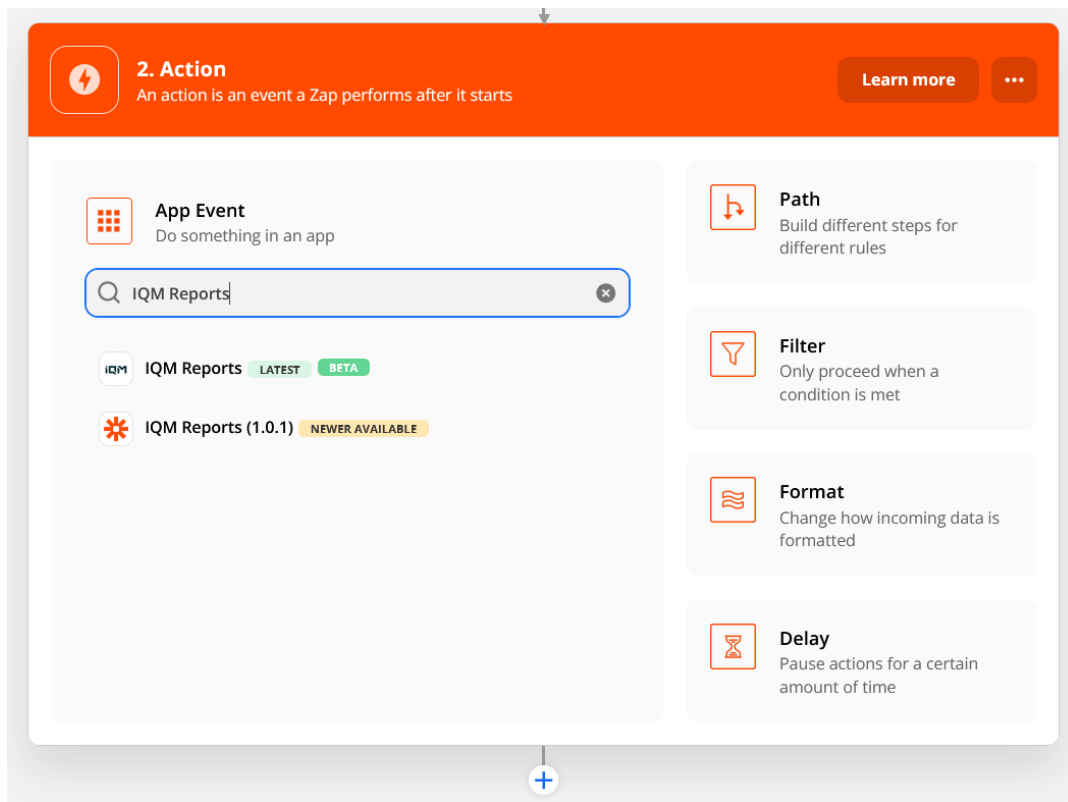
Search...

id: 2022-03-31T16:18:01-07:00  
pretty\_date: Mar 31, 2022  
pretty\_time: 04:18:01 PM  
day\_of\_week: 3  
pretty\_day\_of\_week: Thursday  
date\_year: 2022  
date\_month: 3  
date\_day: 31  
time\_hour: 4  
time\_minute: 18  
time\_second: 1

Continue

- Next, you will be asked to choose and configure the **Action** that the Zap performs each time it is triggered. Zaps can have multiple actions. When a Zap has multiple actions, the output fields of each action can be mapped into the input fields of later actions, just as the outputs of the trigger selected at the beginning of Zap configuration can be mapped into the inputs of any action.

To use the **IQM Reports** Action, search for “IQM Reports” in the search bar and select the IQM Reports option with the green **Latest** icon next to it. This indicates the most up-to-date version of the IQM Reports app.



- From the **Action Event** dropdown, select the **Generate CSV Report** action. This action generates a CSV report containing the aggregated ad-serving data of your running campaigns generated over a specified date range.

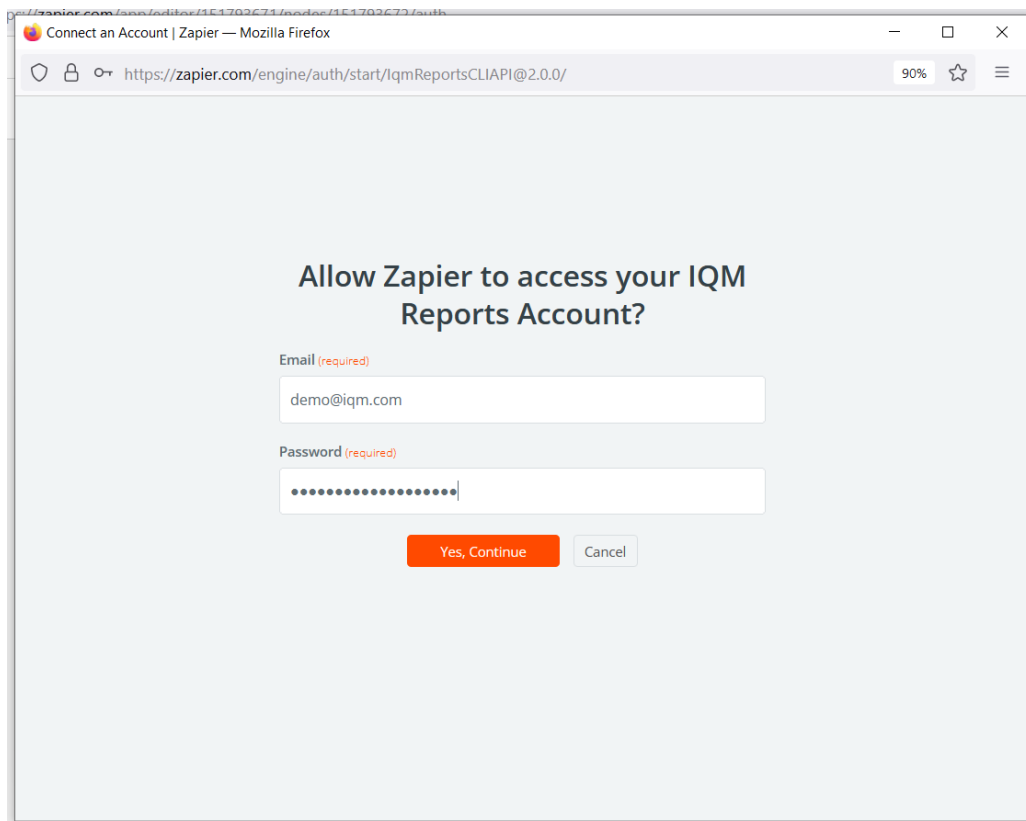
The screenshot shows a configuration window for the '2. Generate CSV Report in IQM Reports' action. At the top, the 'Choose app & event' section displays 'IQM IQM Reports BETA' with a 'Change' link. Below this, the 'Action Event' dropdown is open, showing 'Choose an event' as the selected option. The dropdown menu lists 'CREATE' and 'Generate CSV Report' (which is highlighted). Below the dropdown, a description states: 'Creates a CSV report from ad-serving data.'

Then, click **Continue**.

- Next, you will be asked to sign into your IQM account. Click the **Sign in to IQM Reports** button.

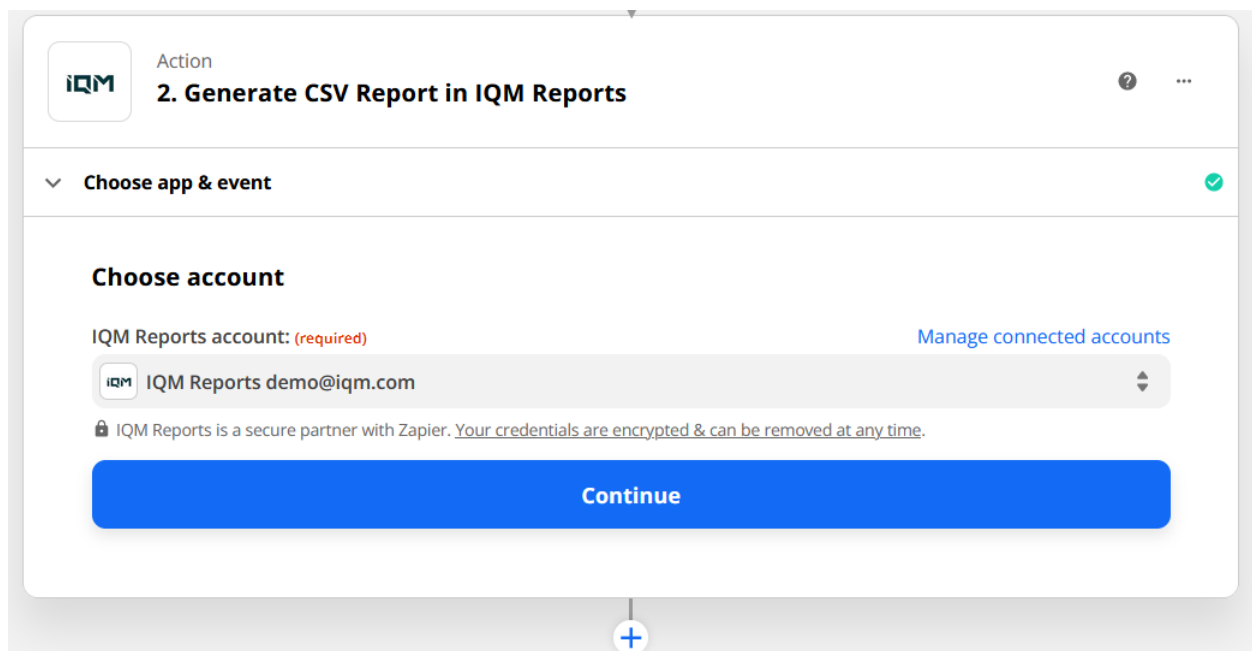
The screenshot shows the same configuration window, but now the 'Choose account' section is active. It features a blue button labeled 'Sign in to IQM Reports'. Below the button, a security note states: 'IQM Reports is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time.' At the bottom of the section, there is a grey button labeled 'To continue, finish required fields'.

In the popup, fill in your IQM email address and password, then click **Yes, Continue**.



A browser window showing a Zapier authentication popup. The title bar says "Connect an Account | Zapier — Mozilla Firefox". The address bar shows "https://zapier.com/engine/auth/start/IqmReportsCLIAPI@2.0.0/". The main content area has a light gray background with the heading "Allow Zapier to access your IQM Reports Account?". Below the heading are two input fields: "Email (required)" with the value "demo@iqm.com" and "Password (required)" with masked characters. At the bottom are two buttons: "Yes, Continue" in orange and "Cancel" in gray.

Finally, click **Continue** to set up the action.



A Zapier action configuration screen. At the top, it says "Action" and "2. Generate CSV Report in IQM Reports". Below this is a section titled "Choose app & event" with a dropdown arrow and a green checkmark. Underneath is a "Choose account" section. It says "IQM Reports account: (required)" and has a link "Manage connected accounts". A dropdown menu shows "IQM Reports demo@iqm.com". Below this is a security notice: "IQM Reports is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time." At the bottom is a large blue button labeled "Continue".

9. Next, set up the action by choosing a **Time Zone** and a **Time Interval**. Predefined time intervals start at midnight on the first day and end at 11:59 PM on the last day of the interval, as determined by the selected time zone.

The screenshot shows the 'Set up action' configuration page for the '2. Generate CSV Report in IQM Reports' action. At the top, the 'iQM' logo is on the left, and the action name is in the center. Below this, there are two sections: 'Choose app & event' and 'Choose account', both with green checkmarks indicating they are completed. The main section is 'Set up action', which contains two dropdown menus. The first is 'Time Zone' with the value 'US/Mountain' selected and a '(required)' label. Below it is a text prompt: 'Enter the timezone you use on the IQM App.' The second dropdown is 'Time Interval' with the value '30 Days' selected and a '(required)' label. Below it is a text prompt: 'Enter the range of time to gather data for the report. When using a predefined interval, report data will range from 23:59:59 on the day before the Zap runs to midnight on the day at the beginning of the specified interval. Choose the "Custom" option from the dropdown to input specific dates and times for the report range.' At the bottom of the 'Set up action' section is a 'Refresh fields' button with a circular arrow icon. Below the entire configuration section is a large blue 'Continue' button. At the very bottom of the interface is a small blue plus icon in a circle.

The **Custom Time Interval** option in the **Time Interval** dropdown allows for finer control over the report's date range. This option allows you to input specific dates and times, map the datetime (such as the **id** output field) output by the **Schedule by Zapier** trigger into the start and end dates of the report's time interval, and use Zapier's built-in functionality for modifying datetime values. Note that any timezone offsets entered here are ignored by the IQM Reports app; the time zone entered into the dropdown is used to calculate the report date range.

For information on allowed datetime values in Zapier, see <https://zapier.com/help/create/basics/different-field-types-in-zaps#step-1>.

In the following example screenshot, the report date range is set by mapping the datetime output by the Schedule by Zapier trigger into the **Date Range Start** and **Date Range End** fields of the action. This means that whenever the Zap runs, the Schedule



by Zapier trigger will pass the datetime at which the Zap starts to execute into the Generate CSV Report action. The **Date Range Start** is set to 90 days before the current datetime using Zapier's built-in datetime calculation features: Zapier allows datetime values to be adjusted via addition or subtraction of days, months, years, etc. See <https://zapier.com/help/create/customize/adjust-date-and-time-values-in-zaps> for more information on how to use Zapier's datetime modifiers.

**Set up action** ✓

**Time Zone** (required)  
IQM US/Mountain

Enter the timezone you use on the IQM App.

**Time Interval** (required)  
IQM Custom Time Interval

Enter the range of time to gather data for the report. When using a predefined interval, report data will range from 23:59:59 on the day before the Zap runs to midnight on the day at the beginning of the specified interval. Choose the "Custom" option from the dropdown to input specific dates and times for the report range.

**Date Range Start** ⓘ ⓘ (required)  
1. ID: 2022-03-31T16:18:01-07:00 -90d

Start of the timeframe for the data to include in the report.

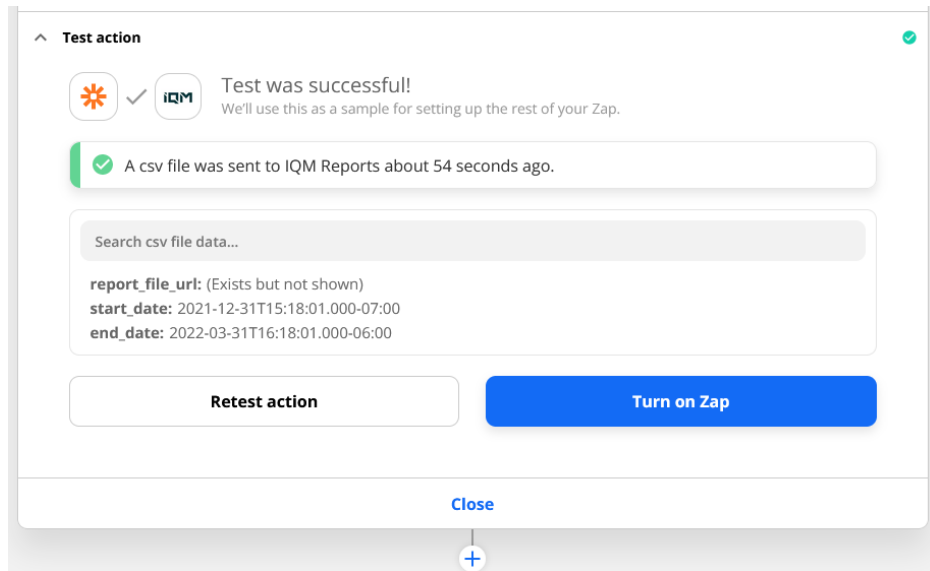
**Date Range End** ⓘ ⓘ (required)  
1. ID: 2022-03-31T16:18:01-07:00

End of the timeframe for the data to include in the report.

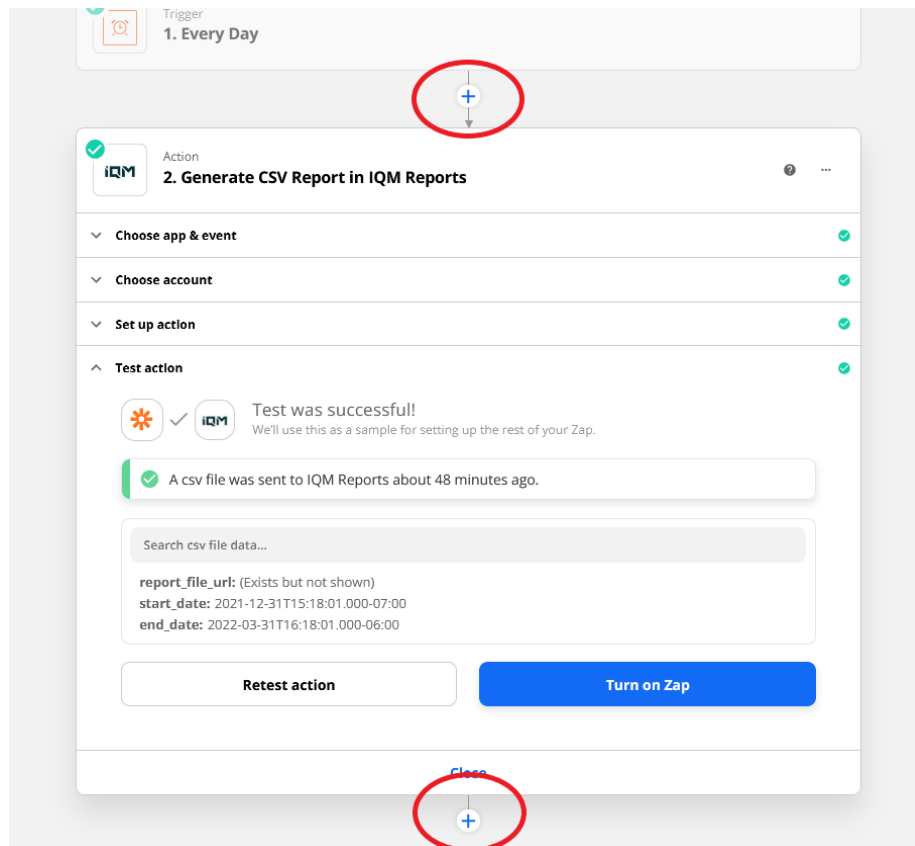
**Refresh fields**

**Continue**

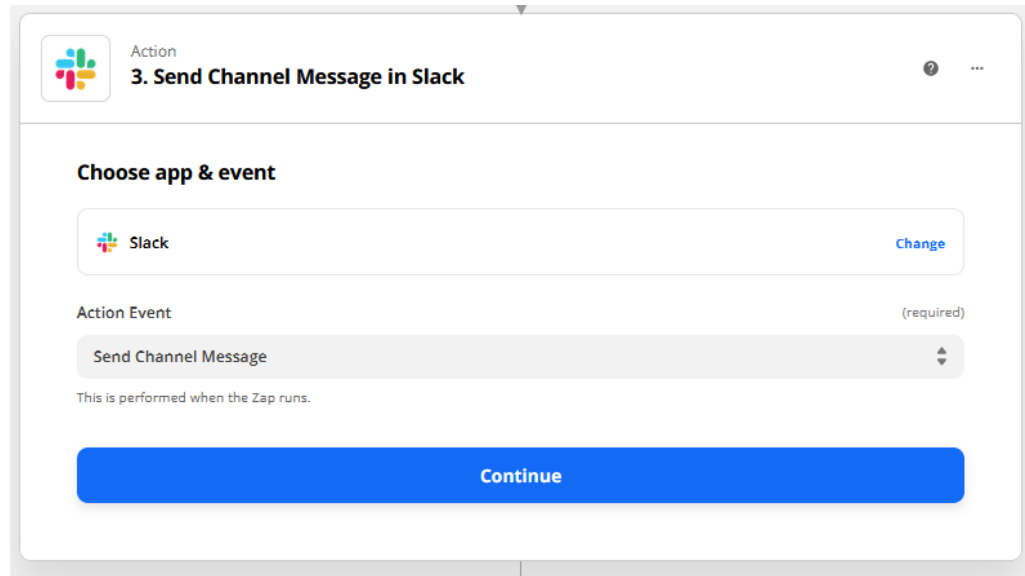
Once the required fields for the action have been filled out, click **Continue** to test the action.



10. The IQM Reports action has successfully been set up! Further actions can be added by clicking on the + symbols below and above the IQM Reports action. Adding actions after the IQM Reports action allows you to make use of the CSV ad-serving report file generated by IQM Reports by mapping it into other apps, such as Dropbox or Slack.



11. For this example, we will make use of the generated report by posting it to a Slack channel. Select Slack as the next action following IQM Reports. The **Send Channel Message** action event will cause the Zap to send a Slack message to a particular channel.



The screenshot shows the Zapier interface for configuring an action. At the top, it says 'Action' and '3. Send Channel Message in Slack'. Below this, there's a section 'Choose app & event'. Under 'Choose app & event', 'Slack' is selected, with a 'Change' link to its right. Below that, 'Action Event' is set to 'Send Channel Message', with a '(required)' label to its right. A small note below the event selection says 'This is performed when the Zap runs.' At the bottom, there is a large blue 'Continue' button.

Just as before, Zapier will prompt you to sign into your Slack account. After logging in, fill out the required fields of the action: Choose a Slack channel to post the message to, and fill in the message text. Note that you can map the output fields of previous actions, including the IQM Reports action, into several of these input fields. For example, in the screenshot below, the **Date Range Start** and **Date Range End** fields output from IQM Reports are mapped into the message that will be posted to Slack (the **Message Text** input field), so that the message will include the report's date range.



Action

### 3. Send Channel Message in Slack

?

✓ Choose app & event

✓ Choose account

#### Set up action

Channel



(required)

 year-campaign

If you use a Custom Value, you can also use the channel ID.

Message Text

(required)

Our ad performance over the past 90 days,  2. Date Range Start: 2022-01-07T18:10:47.000-06:00 to  2. Date Range End: 2022-04-07T19:10:47.000-05:00

#### Insert Data ...



Search...



1. Every Month



2. Generate CSV Report In IQM Reports



2. Date Range End 2022-04-07T19:10:47.000-05:00



2. Report File (Exists but not shown)



2. Date Range Start 2022-01-07T18:10:47.000-06:00

Either an image url or an emoji available to your team (surrounded by :). For example, [https://site.com/icon\\_256.png](https://site.com/icon_256.png) or :robot\_face:

Include a link to this Zap? ☒ ☐

 Yes

Most importantly, you can map the **Report File** into the **File** field to attach the CSV report generated by IQM Reports to the Slack message.

The screenshot shows a Zapier configuration interface for a Slack message action. At the top, there's a toggle for "Link Usernames and Channel Names?" set to "Yes". Below this is a "Schedule At" section with a text input field. The "File" section is highlighted with a blue border and contains a dropdown menu labeled "2. Report File: (Exists but not shown)". An "Insert Data ..." modal is open, showing a search bar and a list of data sources. The list includes "1. Every Month", "2. Generate CSV Report in IQM Reports", "2. Date Range End 2022-04-07T19:10:47.000-05:00", "2. Report File (Exists but not shown)", and "2. Date Range Start 2022-01-07T18:10:47.000-06:00". The "2. Report File" option is selected. Below the modal, there's a "Refresh fields" button and a large blue "Continue" button. A plus sign icon is visible at the bottom center of the interface.

Link Usernames and Channel Names? ☒ ☐

Yes

If no, any usernames and channels mentioned won't be linked (or mentioned). Also affects @channel and @group. Unfortunately, @here notifications cannot be sent by Zapier.

Schedule At

Enter text or insert data...

Schedule the message to be posted later. Cannot be more than 120 days in the future. If you do schedule a message, rather than post it immediately, this Zap step will not return a ts or permalink field.

File

Insert Data ...

Search...

1. Every Month

2. Generate CSV Report in IQM Reports

2. Date Range End 2022-04-07T19:10:47.000-05:00

2. Report File (Exists but not shown)

2. Date Range Start 2022-01-07T18:10:47.000-06:00

If true, posts in the thread and channel. See [here](#) for more info. Ignored unless the message is part of a thread.

Refresh fields

Continue

Click **Continue**, then test the action as before. You should see a message appear in the selected Slack channel, with the CSV report attached.

Search Real Marketing

Real Marketing

# year-campaign

Zapier APP 7:43 PM

Our ad performance over the past 90 days, 2022-01-07T18:10:47.000-06:00 to 2022-04-07T19:10:47.000-05:00

Sent via [zapier.com/app/editor/152568100#slack](https://zapier.com/app/editor/152568100#slack)

Campaign Report 2022-01-07 to 2022-04-07

Campaign ID	Campaign Name	Start Date	End Date	Max Bid(\$)	Daily Budget(\$)	Total Budget(\$)	Hours Viewed	Video Start	Video 25%	Video 50%	Video 75%	Video 100%	Impressions	Clicks	Media Spent(\$)	Total Spent(\$)	Data Cost(\$)	Win Rate(%)	CTR(%)	VCR(%)	eCPC(\$)	eCPM(\$)	CPCV(\$)
"16028"	"Adx - India Discrepancy Check - Video"	"04/07/2022"	"04/11/2022"	"\$5.00"	"\$5.00"	"\$20.00"	"02:16:30"	"757"	"585"	"534"	"493"	"469"	"770"	"6"	"\$4.14"	"\$4.14"	"\$0.00"	"11.44"	"0.78"	"60.91"	"\$0.69"	"\$5.38"	"\$0.01"
"10674"	"Adx Test Campaign"	"10/16/2020"	"11/16/2020"	"\$1.00"	"\$8.00"	"\$8.50"	"00:00:00"	"0"	"0"	"0"	"0"	"0"	"1"	"0"	"\$0.00"	"\$0.01"	"\$0.00"	"20.00"	"0.00"	"0.00"	"\$0.00"	"\$1.00"	"\$0.00"
"10674"	"Adx Test Campaign"	"10/16/2020"	"11/16/2020"	"\$1.00"	"\$8.00"	"\$8.50"	"00:00:00"	"0"	"0"	"0"	"0"	"0"	"1"	"0"	"\$0.00"	"\$0.01"	"\$0.00"	"20.00"	"0.00"	"0.00"	"\$0.00"	"\$1.00"	"\$0.00"

Send a message to #year-campaign

Now that you have a useful Zap, you can turn on the Zap by clicking the **Turn on Zap** button.

3. Send Channel Message

Set up action

Test action

Test was successful!  
We'll use this as a sample for setting up the rest of your Zap.

A channel message was sent to Slack just now.

Search channel message data...

message:

type: message

text: Our ad performance over the past 90 days, 2022-01-07T18:10:47.000-06:00 to 2022-04-07T19:10:47.000-05:00  
\_Sent via <https://zapier.com/app/editor/152568100#slack| zapier.com/app/editor/152568100#slack>\_

upload: true

user: U03AKMHDSG5

display\_as\_bot: false

ts: 1649385805.299099

permalink: https://realmarketingworld.slack.com/archives/C03AKMAPDPX/p1649385805299099

file:

id: F03A80JE215

created: 1649385805

title: Campaign Report 2022-01-07 to 2022-04-07

mimetype: text/csv

Retest action

Turn on Zap

Close

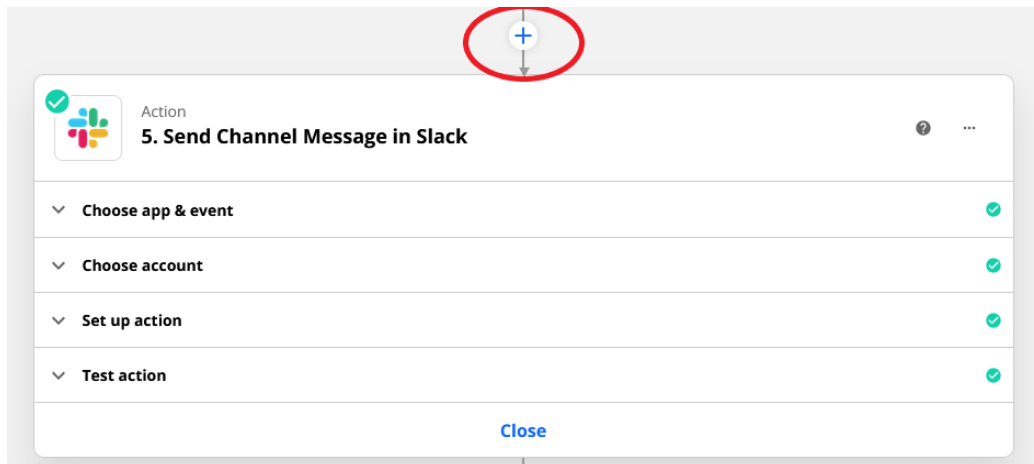
## Formatting IQM Reports' Dates Outputs

The **Date Range Start** and **Date Range End** output fields are presented in the ISO-8601 datetime format. This format is useful for computers, but not very user-friendly for a Slack message. To display these dates in a more readable format, we can use the **Formatter by Zapier** action to convert the dates. Formatter actions provide a number of useful utilities for transforming data. For more information, see the following links:

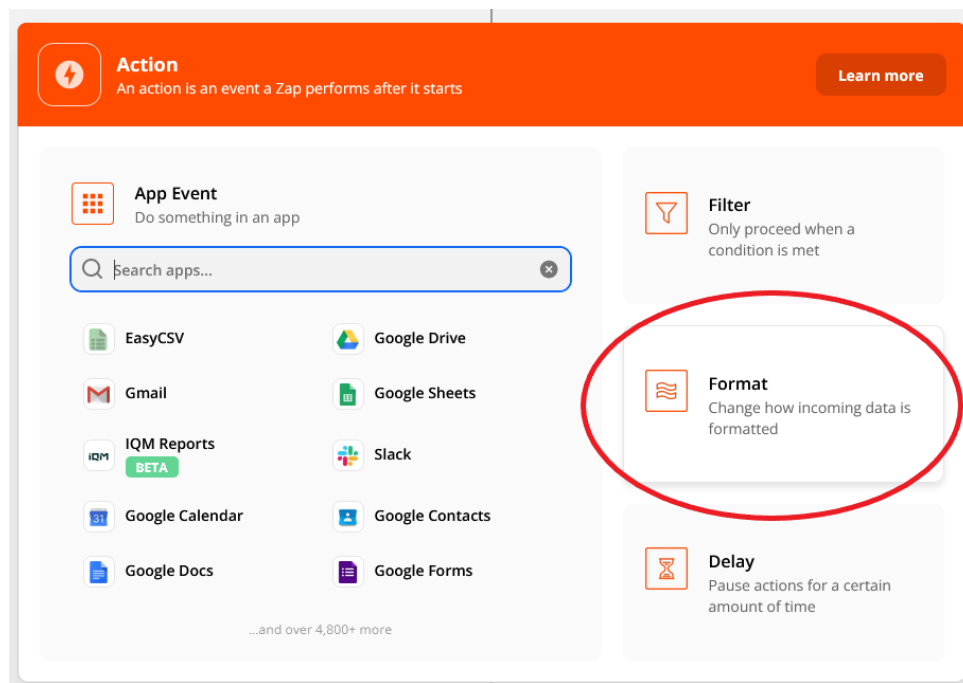
<https://zapier.com/apps/formatter/help>

<https://zapier.com/help/create/format/modify-date-and-time-formats-in-zaps>

To add a Formatter action before the Slack action, click the + button above the Slack action.

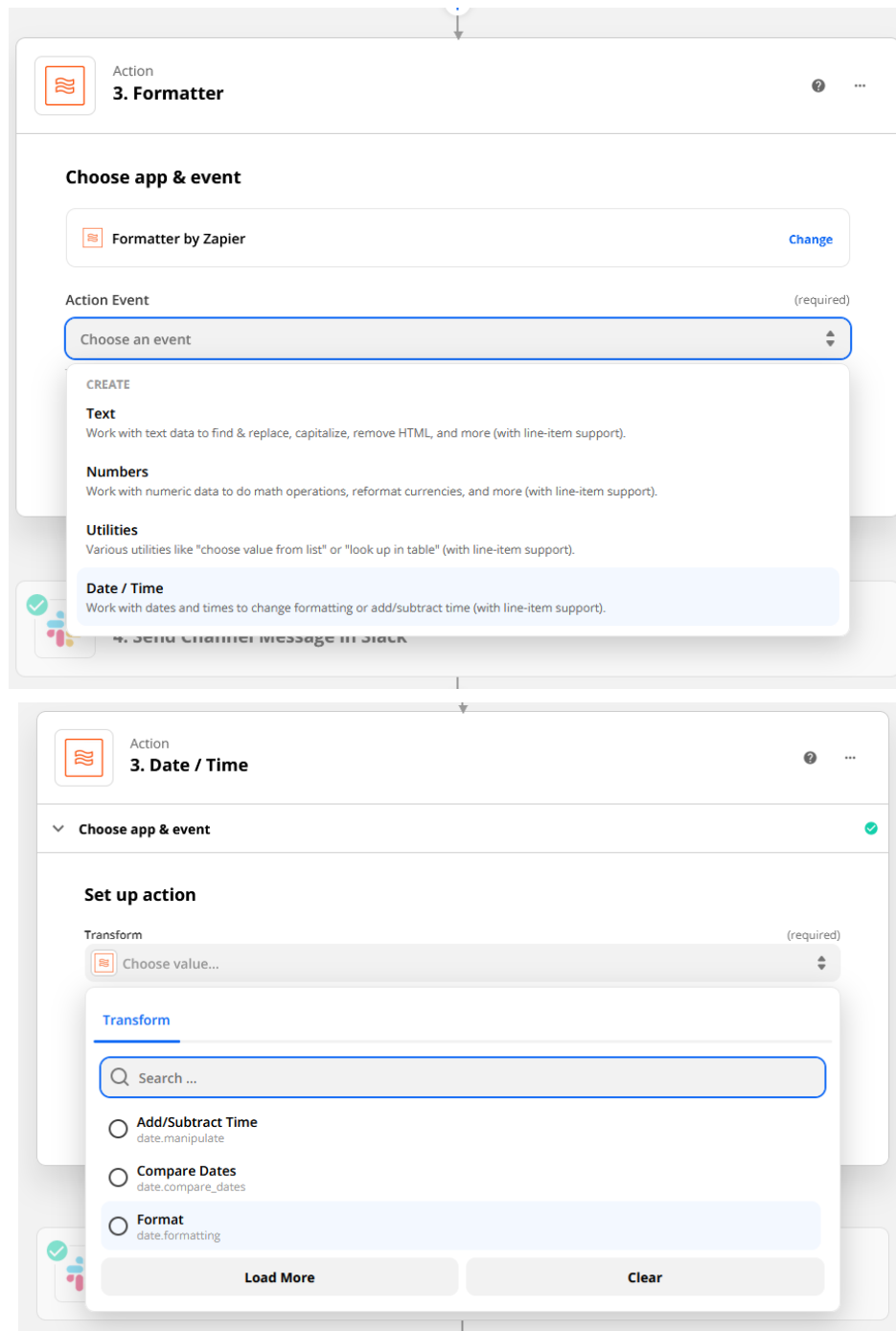


Then, select **Format** for the action.





Under **Choose app & event**, select **Date / Time** in the **Action Event** dropdown and **Format** in the **Transform** dropdown.



In the **Set up action** section, map the **Date Range Start** output field from IQM Reports into the **Input** field of the Formatter action. Then, choose an output format from the **To Format** dropdown to convert the input to. To keep the timezone consistent, choose the same time zone in the **To Timezone** and **From Timezone** fields as you chose for the timezone in IQM Reports. To convert the **Date Range Start** time to a different timezone, choose the same time zone in the **From Timezone** dropdown as in IQM Reports and choose the timezone to convert to in the **To Timezone** dropdown.

### Set up action

Transform

(required)

Format

i

Change a date or time to a new format or style

Values

Input

IQM 2. Date Range Start: 2022-01-07T18:10:47.000-06:00

Date you would like to format.

To Format

(required)

MMMM DD YYYY (January 22 2006)

Provide the format that the date is converted to. For date format help, see: <https://zapier.com/help/create/format/modify-date-formats-in-zaps#customize-date-time-options>

To Timezone

US/Central

Choose a timezone the date should be converted to. (Default: UTC)

From Format

Choose value...

If we incorrectly interpret the incoming (input) date, set this to explicitly tell us the format. Otherwise, we will do our best to figure it out.

From Timezone

US/Central

If no timezone is provided in the incoming (input) data, set this to explicitly tell us which to use. (Default: UTC)

In the **From Format** dropdown, choose the **Custom** tab. This allows you to enter a custom pattern for the date input to tell Zapier how to parse the date. Enter the text “YYYY-MM-DDTHH:mm:ss.SSSZ” without quotation marks, as seen in the below screenshot. (For more information about datetime patterns, see <https://zapier.com/help/create/format/modify-date-and-time-formats-in-zaps#customize-your-date-and-time-options>.)

The screenshot shows the Zapier date format configuration interface. At the top is a text input field labeled "Date you would like to format." Below this is the "To Format" section, which is marked as "(required)". It contains a dropdown menu showing "MMMM DD YYYY HH:mm:ss (January 22 2006 23:04:05)". Below the dropdown is a link to "https://zapier.com/help/create/format/modify-date-formats-in-zaps#customize-date-time-options". The "To Timezone" section contains a dropdown menu showing "US/Central" and a note "Choose a timezone the date should be converted to. (Default: UTC)". The "From Format" section contains a dropdown menu with the placeholder "Enter text or insert data...". Below this is a modal window with two tabs: "From Format" and "Custom". The "Custom" tab is selected, and it contains a search input field with the text "YYYY-MM-DDTHH:mm:ss.SSSZ". Below the search field is a message: "No matches found. Use 'YYYY-MM-DDTHH:mm:ss.SSSZ'". At the bottom of the interface is a blue "Continue" button.

Click **Continue** and test the action as before to verify that the formatter converts the date correctly.

Then, navigate back to the Slack action and open the **Set up action** section. You can now map the formatted date output by the Formatter action into fields in the Slack action, such as the message. You can repeat the above steps for IQM Report's **Date Range End** output field as well.


^

Set up action

✓

Channel

(required)



 year-campaign

⌵

If you use a Custom Value, you can also use the channel ID.

Message Text


(required)

Our ad performance over the past 90 days,  3. Output: January 07 2022 18:10:47 | to  2. Date Range End: 2022-04-07T19:10:47.000-05:00


Insert Data ...

✕


🔍 Search...

 1. Every Month


⌵


 2. Generate CSV Report in IQM Reports

⌵

 3. Date / Time

⌴

 3. ID

 3. Output January 07 2022 18:10:47

Either an image uri or an emoji available to your team (surrounded by :). For example, [https://site.com/icon\\_256.png](https://site.com/icon_256.png) or :robot\_face:

Include a link to this Zap? ☒ ☐

After testing the final action and verifying that it outputs the expected results, you can turn on the Zap by selecting the **Turn on Zap** button in the final action or by clicking on the switch in the upper right corner.

