

TapClicks Quick Start Guide

Welcome to the comprehensive guide for new TapClicks users! This eBook is designed to be your go-to resource as you embark on a journey to master the ins and outs of the TapClicks platform.

Read on for valuable insights and resources to ensure you maximize your experience and make informed decisions for your business.



What you'll learn:

Getting Started

- Learn how the platform works and key terms to know
- Setting up your platform, users, and clients

Data Integration

- Connecting your data sources

Visualizing Your Data

- Creating custom reports and dashboards in a scalable way
- Sharing and scheduling reports and dashboards

Tips and Tricks

- Learn how to use your data to get insights and optimize your campaigns
- Tips and tricks to maximize your efforts and work efficiently

Getting Started with the Platform

Start Learning

This chapter introduces you to the platform and outlines the key terms and functionalities you need to know. Whether you're participating in a TapClicks onboarding program or exploring on your own, these insights will set the foundation for your learning journey.



Explore the platform by clicking the “Guide Me” button at the bottom right corner of any page for a quick tour of each tool or feature.

Also, check out the resources in the help (?) icon in the left navigation.

Building Your Foundation

The TapClicks platform has everything you need to manage your marketing data, tell compelling campaign stories, and efficiently scale your business.

As you get started, we recommend you take three foundational courses in TapClicks Academy:

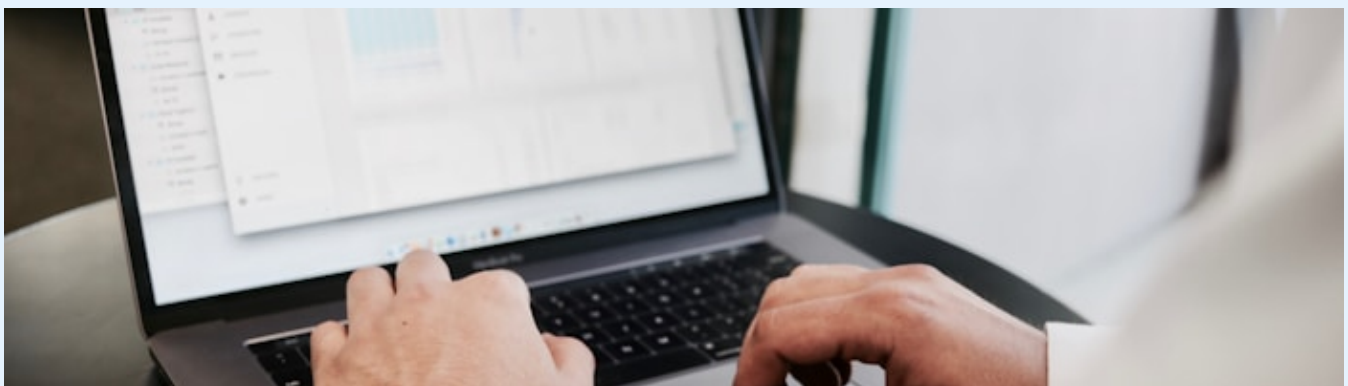
[TapClicks Platform Architecture](#)

[Creating and Managing Clients in TapClicks](#)

[Managing Users and Adding New Team Members](#)

You'll learn how to navigate and set up the platform to best suit the way that your company operates. You can also refer to this [glossary](#) with common terms used in digital marketing and within the TapClicks platform.

If you have any questions about setting up the platform, please join an upcoming [Data Foundations](#) training session to get help from a TapClicks expert!



Data Integration

What is a Data Source?



Data sources in TapClicks are the external applications or databases you'll connect to use for analysis, insight, or reporting. By connecting data sources to TapClicks, you can blend them and run analyses across all of them together.

Once connected, TapClicks streamlines the data collection process by automatically fetching new data from various data source locations. This eliminates the need for manual data entry and ensures that your reports are always up-to-date.

TapClicks simplifies report updates and helps you develop valuable insights from your data. With its user-friendly interface and powerful analytics tools, you can easily create custom dashboards and visualizations. It provides a centralized data warehouse, saving you time and effort while analyzing your marketing and operational data.

Types of Connectors

To connect your data sources to TapClicks, you'll use a connector:

- Instant On Connectors
- Smart Connectors

Instant On Connectors are pre-built and setup is as easy as authenticating the connector with the provider and assigning that data to a Client.

Most users start by connecting applications using Instant On Connectors. Examples of common Instant On Connectors include the following:

- Google Analytics 4
- Google Ads
- Facebook Insights
- Amazon Ads
- Youtube

If an Instant On Connector doesn't exist in TapClicks for your data source or if you want to use some of your own data residing in a spreadsheet, that's where Smart Connectors come in.

Smart Connectors provide a way to build an automated pipeline to your data in a CSV, Google Sheet, or even in a database.

Integrating Data Sources

Now it's time for you to learn how to unlock the seamless data integration and reporting capabilities in TapClicks. Learn how to connect your data, assign it to clients, and explore the basics of data connections and Smart Connectors. Elevate your data management skills with expert guidance in live training sessions.

Creating data connections in TapClicks is a simple process that allows users to easily integrate their data from various sources into one centralized platform.

Ready to connect your data? Watch the 30-second video below ↓

Next, take the [Connecting Your Data](#) and [Managing Your Data Connections](#) courses to learn the basics about data connections in TapClicks. In these courses, you'll also learn a little bit about Smart Connectors so you can connect your data from nearly anywhere!

And if you want to learn more about Smart Connectors, please join an [upcoming session](#) with a live instructor!



Visualizing Your Data

Creating Custom Reports and Dashboards

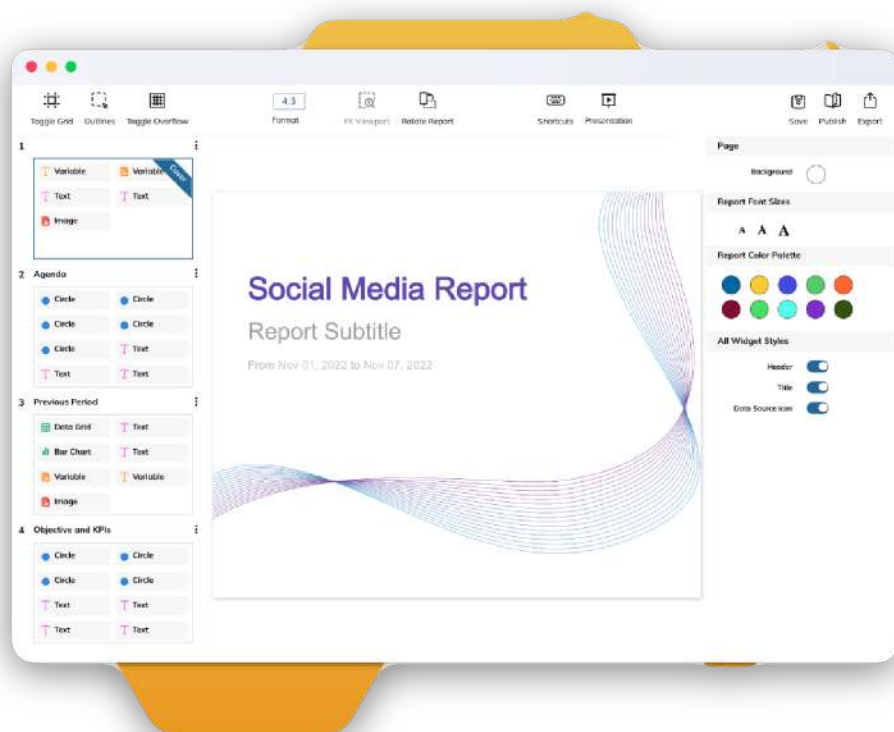
Are you ready to dazzle your clients with visually appealing, customized reports, and dashboards? Discover the art of storytelling through data visualization, explore the Report Studio, and leverage pre-designed templates to create impactful reports. Master the art of scheduling reports for timely updates.

By creating a dashboard or scheduled report, you can share information with your clients or team members through a link. You can build rich visualizations and graphs in a widget to effectively present the data and gain insights on how to improve your campaigns and marketing strategy.

Get started with these courses:

[Designing Dashboards to Visualize Your Data](#)

[Using Report Studio to Visualize Your Data](#)



Widget Design

You can customize the data that's displayed, adjust the visual style, and then arrange the widgets to build a customized report or dashboard. Widgets play a crucial role in allowing users to efficiently monitor and analyze data across multiple channels and platforms from a single interface within the TapClicks platform.

A widget in TapClicks is a customizable component that displays specific data or metrics from various integrations or data sources. These widgets can be configured to show different types of information such as website analytics, social media metrics, advertising performance, and more.



If you aren't a graphic designer, you don't have to fret about design.

We have plenty of templates that are visually appealing and contain the top KPIs for your data sources. Use these as a starting point to quickly create your reports.


GET SOME INSPIRATION

If you'd like some feedback on your designs or additional styling tips, please join an upcoming [Visualization & Distribution](#) live training session.

Scheduling Reports

The Report Scheduler is a useful tool that helps you manage the sharing of reports from the TapClicks platform automatically. With this feature, you can schedule reports and keep your stakeholders informed and empowered, while also reducing your workload. By using scheduled reports, you can have more meaningful conversations with stakeholders and focus on analyzing trends rather than spending time manually creating reports at regular intervals.

Resource

Take the TapClicks Academy course: [Scheduling Your Reports](#)  17.

Resource

Learn more about what's possible with report automation. See articles [here](#)!

Enhance Your Decision-Making with Data Transformation Tools

As you get started with TapClicks, know that there are data transformation tools, available in certain package levels, that will supercharge your data analysis and decision-making process.

To begin exploring data transformation: 🚀

- Transform connected data into new metrics with the calculations tool. Learn [how to create calculations](#).
- TapClicks also has tools that make it easy to apply a margin or markup to cost-related metrics so that you can display the right costs to your clients. See this article to find out [how to use margin rules](#).
- Learn more about what's possible. See articles [here!](#)



Tips to Optimize How You Work in TapClicks

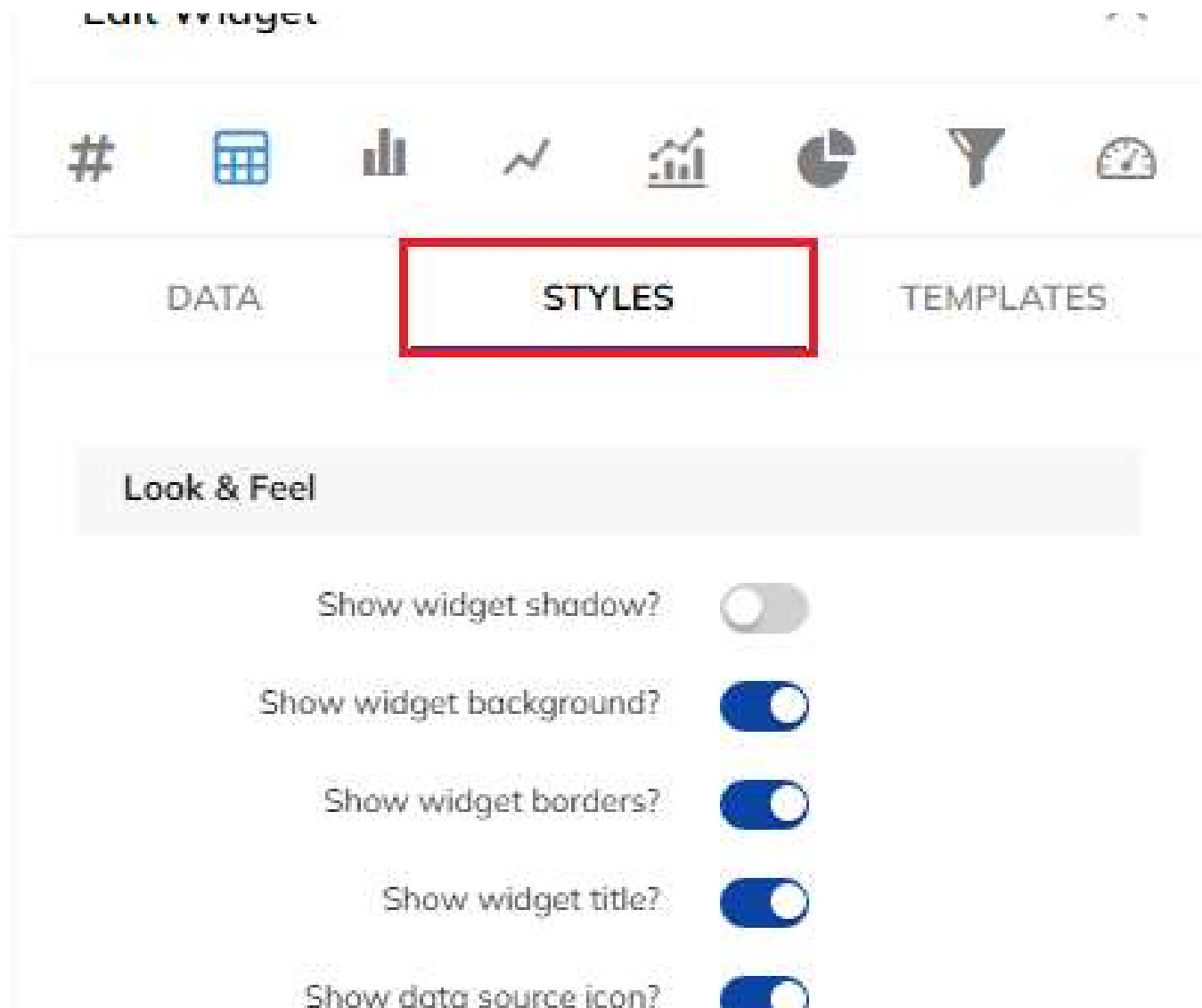
We've compiled some tips to help you become a TapClicks expert in no time! This set of time-saving tips and tricks is what experts *wish* they had when they first started. Let's dive straight in!

Grid Widget Styling

There are lots of options in the “Styles” tab of a Grid widget. You can paginate records to show more records displayed in the grid/table.

You can also enable text wrapping and alternating row colors to make the grid easy to read. If you have images, like a creative ad preview, in your data set, images will be displayed in a grid widget!

Learn more by reading this article about [Grid widget styling](#).



Reporting Tips

- 01 Export your Dashboard into Report Studio. By exporting, all your widgets in Report Studio will also be updated when you run a report or send a report.**

- 02 Dashboards cannot be recovered once you delete them. Be sure you want to permanently remove the dashboard.**

- 03 You can publish a Dashboard, Dashboard Section, or even a single widget to the library. The items in your library can be re-used like building blocks for your next Dashboard or Report Studio report creation.**

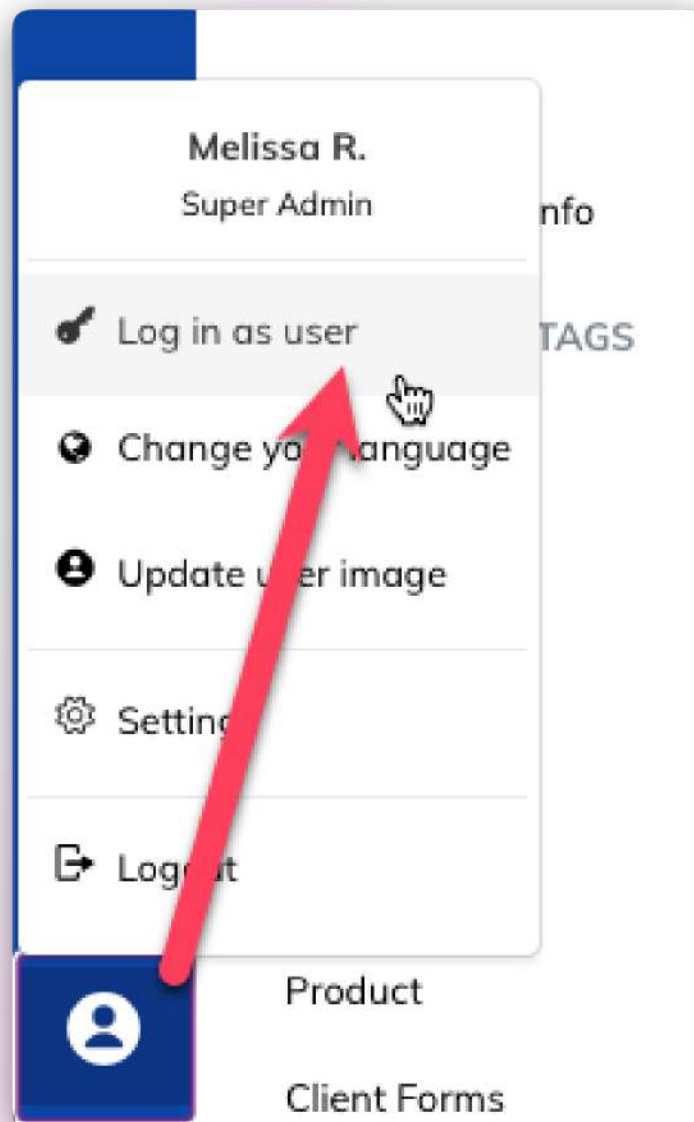
- 04 The Executive Summary module in the Reports section of the platform shows all of the Executive Summaries that have been created.**

Admin

1. When creating another user, impersonate them before sending them a welcome email. You can do that by clicking on the user icon in the bottom left and "log in as user."
2. Upload each of your Client's logos so they can see it in their reports.

To do so, go to Admin > Clients if you didn't upload the logo during the initial Client creation.

By implementing these strategic tips, you're poised to unlock the full potential of TapClicks for your marketing endeavors.



🌟 Congratulations on completing the Quick Start Guide!

We hope you continue exploring and learning to unlock the full potential of TapClicks.

When you need some help, don't forget to contact our [Support team](#) and get immediate updates on the [TapClicks Status](#) page about any ongoing maintenance, incidents, or disruptions. (These happenings are rare!)

If you find yourself needing more professional guidance, talk with your Customer Success Manager to learn about **Professional Services**.

Just like any other valuable tool in your tech stack, the more you dive into using TapClicks, experiment, and explore, the more significant benefits you will gain!

We hope this eBook serves as a valuable companion throughout your TapClicks learning experience. Happy exploring!