e dialog®

precisioncentral 7.0 RELEVANCE ENABLING TECHNOLOGIES

eReports 7.0 User's Guide

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Introducing eReports

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About eReports

e-Dialog eReports™ is an in-depth reporting tool, that provides insight into the performance of your e-mail campaigns and programs. It allows you to analyze campaign results far beyond just click-throughs and open rates. eReports can track performance down to the link or domain level, and accurately measure conversion tracks – the most effective metrics for determining return on investment in an e-mail campaign.

eReports offers:

- Real-time reporting of vital campaign performance statistics
- More available performance metrics than alternative reporting tools
- 16 standard reports, with customer reports available upon request
- Ability to export reports to Microsoft Excel spreadsheet format

Features of eReports include:

- Fully automated data capturing and report generation
- Intuitive Web interface with around-the-clock access to data
- Flexible selection and sorting capability with drill-down reporting
- Customizable views that include raw data, percentages, and charts
- Visual live reports with heat gauge click-through activity indicators
- Ability to analyze and compare results from multiple campaigns

With eReports you can generate reports associated with a campaign, mailing, cell, audience, domain, format, or link. eReports provides the following metrics:

- Total mailed
- Net delivered
- Delivery rate
- Open rate (HTML)
- Total click rate
- Unique click rate
- Unsub rate
- Conversion tracks

Conversion tracks include metrics such as percentage of net delivered, percentage of unique clicks, and average revenue per customer. These metrics are essential in determining how well your e-mail campaign is delivering a return on investment and how you can improve it.

eReports also features Pulse Reports, a unique reporting subset that provides instant access to vital performance metrics as the campaign is mailing. You can examine opens, clicks, and conversion rates by the day or by the hour, and track real-time performance of categories, domains, and links. It is the timeliest and most effective tool for measuring e-mail productivity.

Customization for Your Organization

e-Dialog configures Precision Central applications to meet your organization's specific preferences. Also, to accommodate the different access needs of individual users, e-Dialog sets up individual profiles based on user name. Your Professional Services Account Team helps to configure these preferences during your initial set-up process.

For example, your organization may want to provide certain employees with the ability to upload new audiences and assign these audiences to new users. On the other hand, others may only have the ability to upload a new audience solely for their own use. Or, some employees may not be able to send final e-mails, while other are allowed to do so.

Note: As a result of the modular approach, some of the functionality described in this document may not apply to you.

System Requirements

Precision Central 7.0 requires:

- Microsoft Windows or Apple Macintosh OS X*
- Adobe Flash Player 9.0.28 or newer

  Adobe Flash Player is required only for Insight Builder, User Management, Precision Dashboard and Data Director.
- One of the following Web browsers:
  - *Internet Explorer 7* (http://www.microsoft.com/downloads/) on Windows
  - *Firefox 3* (http://www.mozilla.com/en-US/firefox/) on Windows and Macintosh OS X*

* The middle scroll button of a Macintosh mouse may not work consistently in Precision Central 7.0. This is a known issue in Adobe Flash Player.

Starting eReports

To start eReports:

1. Log in to Precision Central.
2. Select **Reporting** > **eReports**.

See Setting Your Default Application in Introducing Precision Central 7.0 for instructions on specifying which application appears when you log in to Precision Central.

Getting a List of Mailings

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Viewing the List of Mailings

When you start eReports, a list of all your mailings, filtered by date and categories, appears.

Filtering the List of Mailings

You can filter the list of mailings by specifying search criteria, including date and categories.

Filtering by date

You can filter the list to include only mailings created between specific dates.

To filter the list by dates:

1 Click the calendar icon to select the start date.
The resulting list includes mailings created on the date you specify.
2 Click the calendar icon to select the end date.
The resulting list includes mailings created on the date you specify.
3 Click **Search**.

Filtering by category

You can filter the list of mailings to include only the categories you select.

To filter by categories:

1 Select a category from the first drop-down list.
The resulting list includes only mailings assigned to the first category you specify.
2 Select a category from each subsequent drop-down list.
The resulting list includes only mailings assigned to all of the categories you specify.
3 Click **Search**.

Selecting Mailings

You can select individual mailings or multiple mailings to analyze in more detail.

To select each mailing to analyze, click the check box next to it.

Working with Reports

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About the Reports

eReports includes standard reports, and can include custom reports for your organization.

The list of mailings provides general information about each mailing, including the number of cells, audiences, and links, the format in which the mailing was sent, how many e-mails were delivered, how many recipients clicked on, and the unsubscribe rate.

The standard reports provide more in-depth information.

To sort the data in a report, click the column header.

Mailing Summary Report Contents

The summary information, available when you select MAILING SELECTIONS from the Select Report drop-down list, includes the following information:

Data	Description
Date Mailed	The date on which the mailing was initially launched. If a mailing has multiple cells that were launched across more than one day, Date Mailed is the date on which the first cell was launched.
Last Refreshed	The date and time when the mailing results were last updated, where the time of day refers to the time zone identified in the upper left corner of the report you are in. Automatic refreshes to mailing result data occur once every 24 hours (overnight) for the first 30 days after a mailing is launched. It is rare that significant activity occurs with a mailing after that amount of time, but you can kick off refreshes at any time by going to the Mailing Selection screen and clicking the Refresh icon in the Last Refreshed column for the mailing which you would like to update.
Mailing Name	Name of the mailing.
Send Mode	Whether the mailing was sent as full service (FS) or self-service

	using Campaign Builder (CB).
# Cells	Total number of cells in the mailing.
# Audiences	Total number of audiences to whom the mailing was sent.
# Links	Total number of links in the mailing.
Format	MIME type of the e-mail message content, including HTML (H), text (T), and multipart (M).
Net Delivered	Total Mailed minus e-mails that were undeliverable. Total number of records that were successfully delivered to an e-mail address
Unique Click Rate	The number of e-mail message recipients who clicked through on at least one URL link within the e-mail (excluding the "unsubscribe" link) as a percent of Net Delivered. Unlike Total Click Rate, Unique Click Rate does not count multiple clicks by the same message recipient or clicks by multiple people to whom the message was forwarded. This is the best measure for answering the question, "What percent of my message recipients clicked through to access more information?" It is a good proxy for the effectiveness of an e-mail's message content. **Note:** At the Link level of a report, Unique Click Rate represents the number of clicks on the specific link as a percent of Net Delivered messages that contain the link (excluding multiple clicks on that link by the same message recipient).
Conversion Rate	Percentage of Unique Clicks, which is calculated by calculating Unique Conversions as a percentage of Unique Clicks. This measure answers the question "What percent of recipients who clicked through on the mail message then converted at the destination web site?" Multiple conversions are not counted in this equations; each recipient is credited with a maximum of one conversion. A conversion occurs when an e-mail recipient clicks through on the message and ultimately reaches the conversion web page that has been pre-selected as a goal for the mailing. The conversion page is typically a confirmation page presented after a purchase, registration, or information request is completed.
Unsub Rate	Unsubscribe requests as a percent of Net Delivered. High Unsub Rates indicate that your message content and/or frequency are not well targeted to your audience.
Category	Categories to which the mailing belongs.

Standard Reports

The standard reports in eReports include:

Report	Provides information for...
MAILING SELECTIONS	Mailings in the filtered list of mailings
Mailing Summary	Each selected mailing
Mailing / Cell	Each cell in each selected mailing
Mailing / Cell / Audience	Each audience in each cell of each selected mailing
Mailing / Cell / Link	Each link in each cell of each selected mailing
Mailing / Cell / Link / Format	Each link in each cell of each selected mailing, in each format sent
Mailing / Cell / Format	Each cell in each selected mailing, in each format sent
Mailing / Audience	Each audience to which a mailing was sent
Mailing / Audience / Link	Each link in a mailing, by audience
Mailing / Audience / Format	Each audience to which a mailing was sent, by format in which the mailing was sent
Mailing / Link	Each link in a mailing
Mailing / Link / Audience	Each link a mailing, by audience to which the mailing was sent
Mailing / Format	The selected mailing, by format in which the mailing was sent
Mailing / Domain	The selected mailing, by domains to which the mailing was sent
Mailing / Cell / Domain	Each cell in the selected mailing, by domains to which the mailing was sent
Mailing / Audience / Domain	Each audience to which the mailing was sent, by domain to which the mailing was sent
Mailing / Domain / Format	Each domain to which the mailing was sent, by format in which the mailing was sent

Standard Report Contents

All of the ***standard reports*** (on page 13) available in eReports, except for the summary that is available when you select MAILING SELECTIONS from the Report drop-down list, contain the following information:

Column	Description
Date Mailed	The date on which the mailing was initially launched. If a mailing has multiple cells that were launched across more than one day, Date Mailed is the date on which the first cell was launched.
Last Refreshed	The date and time when the mailing results were last updated. **Note:** The time of day refers to the time zone identified in the Mailing Selections page. Automatic refreshes to mailing result data occur once every 24 hours (overnight) for the first 30 days after a mailing is launched. It is rare that significant activity occurs with a mailing after that amount of time, but you can kick off refreshes at any time by going to the Mailing Selection screen and clicking the Refresh icon in the Last Refreshed column for the mailing which you would like to update.
Level	Level of data presented in an individual table row, including: ♦ Mailing - a series of messages sent out as part of a common communication initiative ♦ Cell - within a Mailing, a group of messages with common content (or, in the case of a custom published mailing, a group of messages with common content rules) ♦ Audience – within a Mailing or Cell, a group of recipients that have been pre-defined as members of the same Audience for analysis purposes ♦ Link - A clickable URL within an e-mail which enables the message recipient to access a web page with more information ♦ Format - the visual method of presenting the e-mail message content. The most commonly used formats are text (T), HTML (H), and multipart (M). Multipart is a graphical HTML e-mail that defaults to a plain text message if the recipient's e-mail client cannot support HTML messages.
Name	Name of the mailing, cell, audience, link, or format.
Total Mailed	The total number of unique e-mail addresses to which a mailing is sent. **Note:** Messages mailed is not the same as messages delivered. This is because almost every mailing contains some e-mails that do not reach the intended recipient because of inactive e-mail addresses and/or problems with the recipient's e-mail server. Another way to think of Total Mailed is the number of e-mail addresses that were in the "To:" field when the "Send" button was clicked.

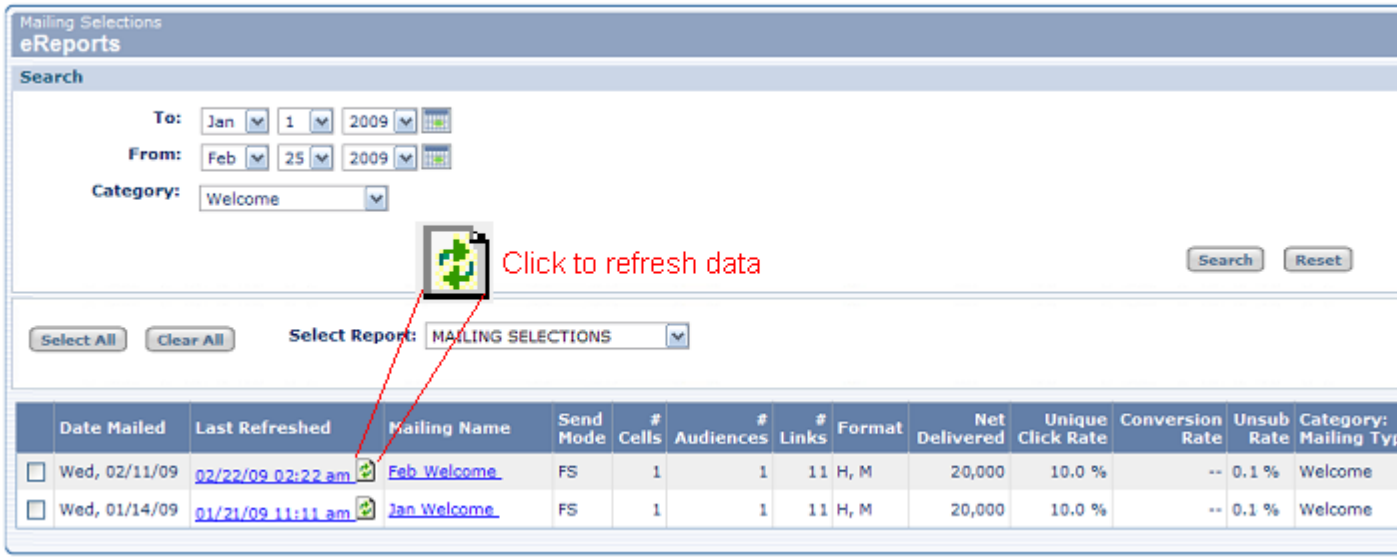
	Note: At the Link level, the Total Mailed number is greater than at the Mailing, Cell, Audience, or Format level if the same link appears more than once within a message.
Net Delivered	The number of unique e-mail addresses to which a mailing is successfully delivered. This is calculated by subtracting the number of Undeliverable Addresses from Total Mailed. The primary reasons for undeliverable e-mails are: ♦ inactive e-mail addresses ♦ problems with or unavailability of the recipient's e-mail server Net Delivered is the basis for most other mailing performance calculations, including open rates, click rates, and unsubscribe rates. **Note:** At the Link level, the Net Delivered number will be greater than at the Mailing, Cell, Audience, or Format level if the same link appears more than once within a message.
Delivery Rate	Net Delivered as a percent of Total Mailed.
Open Rate (HTML only)	The number of HTML messages opened. This is a measure of unique opens; multiple opens by the same person and messages that are forwarded to another party and then opened are not counted in Opens. Use this measure with some caution because: ♦ It is only possible to track whether an e-mail was opened if the e-mail is in HTML format or other graphically rich format, but not plain text. ♦ If the preview window is enabled in the recipient's e-mail client, previewed e-mails cannot be distinguished from e-mails that are actually opened. Both are counted as opened messages.
Total Click Rate	The total number of clicks on all URL links contained within an e-mail message (except for the "unsubscribe" link) as a percent of Net Delivered. If the same message recipient clicks multiple times on either the same link or multiple links within a message, all of those clicks are counted when calculating Total Click Rate. Similarly, if a message is forwarded without using e-Dialog's Forward-to-a-Friend application, any clicks by recipients of the forwarded message are counted when calculating this measure. To avoid counting multiple clicks by the same e-mail recipient or by those to whom the e-mail was forwarded, use Unique Click Rate. **Note:** At the Link level of a report, Total Click Rate represents the total number of clicks on the specific link as a percent of Net Delivered messages that contain the link, including multiple clicks

	on that link by the same message recipient.
Unique Click Rate	The number of e-mail message recipients who clicked through on at least one URL link within the e-mail (excluding the "unsubscribe" link) as a percent of Net Delivered. Unlike Total Click Rate, Unique Click Rate does not count multiple clicks by the same message recipient or clicks by multiple people to whom the message was forwarded. This is the best measure for answering the question, "What percent of my message recipients clicked through to access more information?" It is a good proxy for the effectiveness of an e-mail's message content. **Note:** At the Link level of a report, Unique Click Rate represents the number of clicks on the specific link as a percent of Net Delivered messages that contain the link (excluding multiple clicks on that link by the same message recipient).
Unsub Rate	Unsubscribe requests as a percent of Net Delivered. A high Unsub Rate indicates that your message content and/or frequency are not well targeted to your audience.
% of Net Delivered	Unique Conversions as a percentage of Net Delivered. This measure answers the question, "What percent of people who received the e-mail message clicked through to a web site and converted?" Multiple conversions are not counted in this equation; each recipient is credited with a maximum of one conversion.
% of Unique Clicks	Unique Conversions as a percentage of Unique Clicks. This measure answers the question, "What percent of people who clicked through on the e-mail message then converted at the destination web site?" Multiple conversions are not counted in this equation; each recipient is credited with a maximum of one conversion.
Avg. Revenue per Customer	Total Revenue divided by Unique Conversions. Unique Conversions is a proxy for the number of customers who converted at least once.

Refreshing Mailing Data

Mailing campaign result data is refreshed once every 24 hours (overnight) for the first 30 days after a mailing is launched. It is rare that significant activity occurs with a mailing after that amount of time. However, you can perform a refresh at any time.

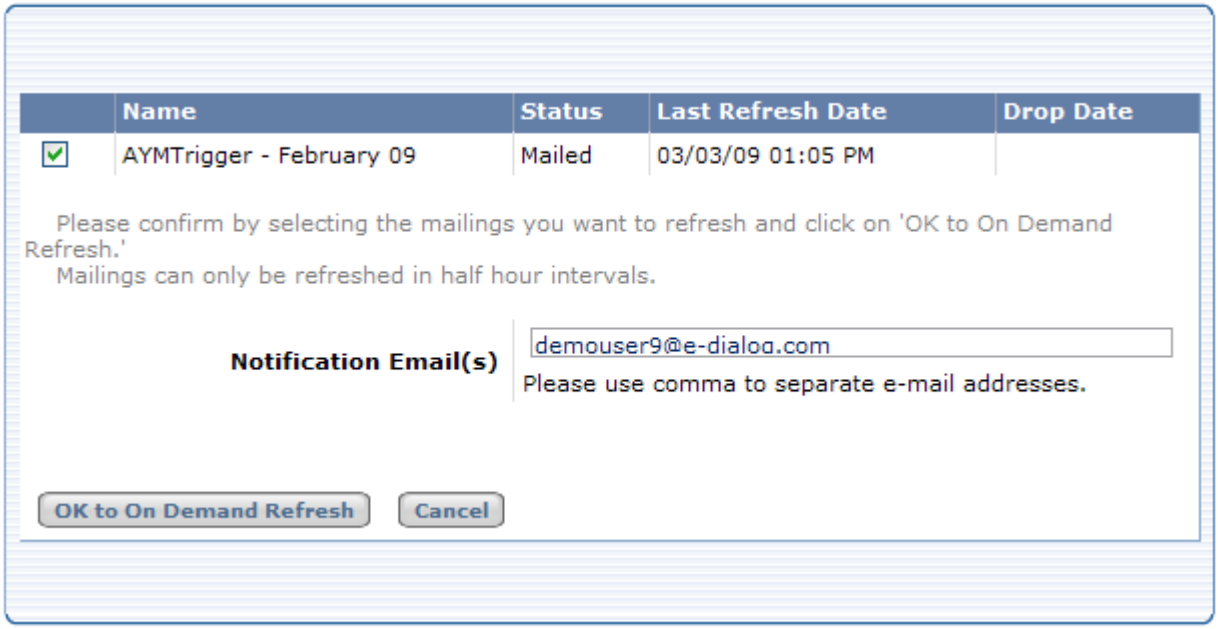
Note: You can only refresh mailing data from the Mailing Selection Screen.



To refresh mailing data:

1 Click for the mailing that you would like to update.

The On Demand Refresh window appears.



2 Ensure that the mailing is the one you want to refresh.

3 Enter an e-mail address to receive an automatic notification message when the refresh is complete.

4 Click **OK to On Demand Refresh.**

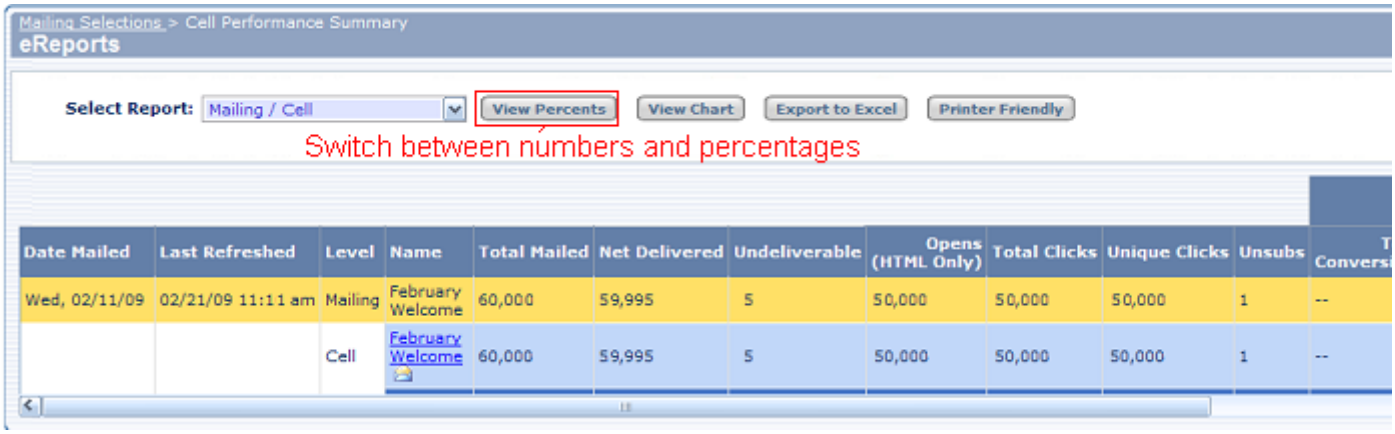
The length of the refresh process can vary significantly depending upon the size of the audience of the mailing campaign and the amount of load on the e-Dialog systems at the time of the refresh. Except for very large mailings, refreshes typically complete within 15 minutes. Refreshing a mailing updates all of the cell, audience, link, and format detail for that mailing.

Viewing Percentage or Numeric Data

In standard reports, you can switch between displaying data as numbers or as percentages.

To switch from numbers to percentages, click **View Counts**.

To switch from percentages to numbers, click **View Percents**.



Exporting a Report to an Excel Spreadsheet

You can export any standard report to an Excel spreadsheet.

1 Display the report you want.
2 Click **Export to Excel**.
3 Click **Save**.
   You can open the file by clicking **Open**.
4 Select the location where you want to save the file.
5 Enter a name if you want to save the file using a name different from the one specified.
6 Click **Save**.

Printing a Report

To print a report:

1 Display the report you want to print.
2 Click **Printer Friendly**.
   eReports displays the report in a separate browser window.
3 In the browser, select **File > Print**.
   Tip: You might get better results if you specify Landscape as the orientation.

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Creating a Chart

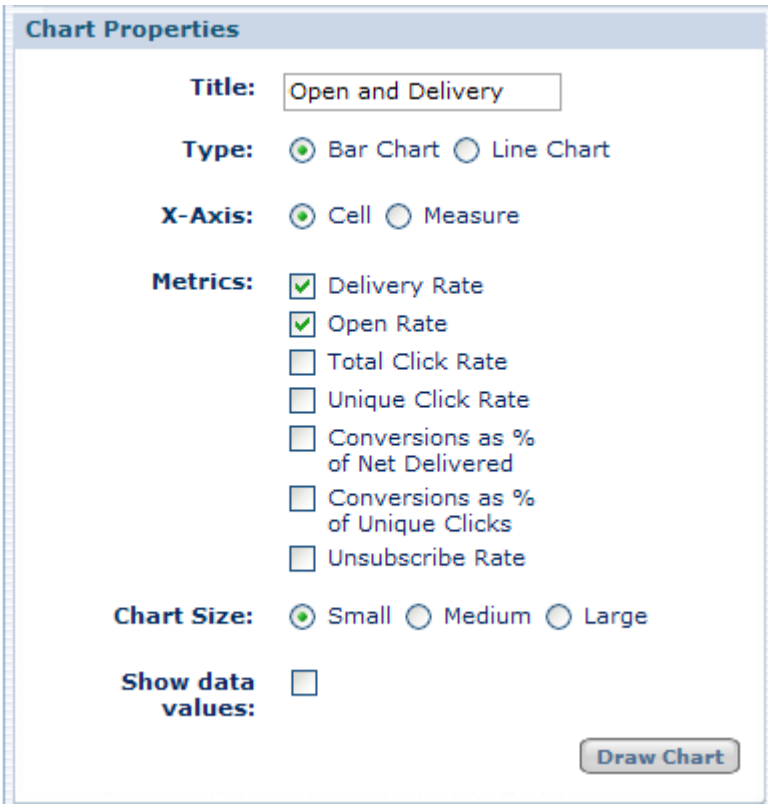
Charts display data about the lowest level of the currently displayed report. The lowest level is the last item in the report name. For example, for the Mailing / Audience / Link report, the lowest level is Link.

To create a chart of the data in a standard report, while viewing the report, click **Chart Data**.

The sort order of a chart is the same as the report. If two or more mailings have the same Date Mailed, they are sorted by name.

Modifying a Chart

You can change the title, type, data that is represented in the chart, the size of the chart, and whether to display numeric or percentage values in the chart.



To modify the chart:

1 Use the controls in the Chart Properties pane.

You adjust chart properties, such as adding a title, specifying bar chart vs. line chart, selecting measures to display, adjusting chart size, and choosing whether or not to display data values. The choices within the Chart Properties pane change depending on whether you have selected a bar chart or a line chart, and on whether you are in View Percent or View Count mode.

If you select Bar Chart, the choices for the X-Axis are:

§ **Mailing** (or Cell, Audience, Link, or Format – whatever the lowest level of data is on the report you chose prior to selecting View Chart)

§ **Measure.** Selecting Mailing (or Cell, Audience, etc.) places the Mailing names on the X-Axis (horizontal axis), and places the selected measures in the chart legend, so that all measures for a given mailing are grouped together on the chart. Selecting Measure places the Measures on the horizontal axis and the Mailing names in the chart legend, so that it is easier to compare performance across mailings for a given measure.

If you select Line Chart, the choices for the X-Axis are:

§ **Mailing** (or Cell, Audience, Link, or Format)

§ **Measure**

§ **Dates**

2 View percentages or counts.

As when you are viewing campaign results in a table, you can toggle between count measures and percent measures by clicking on **View Counts** or **View Percent** above the chart.

3 To change the level being graphed, select a different report using the Report Navigator. The lowest level on the report you choose is the data that is displayed in the chart.

4 Click **Draw Chart**.

Copying a Chart

To copy a chart image to the clipboard:

1 Right-click on the chart.

2 Select **Copy**.

3 Open the application you want to use to save the chart image.

4 Select **Paste**.

Saving a Chart

To save a chart:

1 Right click on the chart.

2 Select **Save Picture As**.

3 Enter the name for the file.

4 Select the image type.

5 Click **Save**.

Additional Chart Navigation

When viewing a chart:

- When you click **View Counts** or **View Percents** to change the display, the list of measures to select for use in the chart changes.
- Click **View Table** to return to the report.
- When you select a different report type, eReports returns you to the report in table format. To see the chart, click **View Chart**.

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