

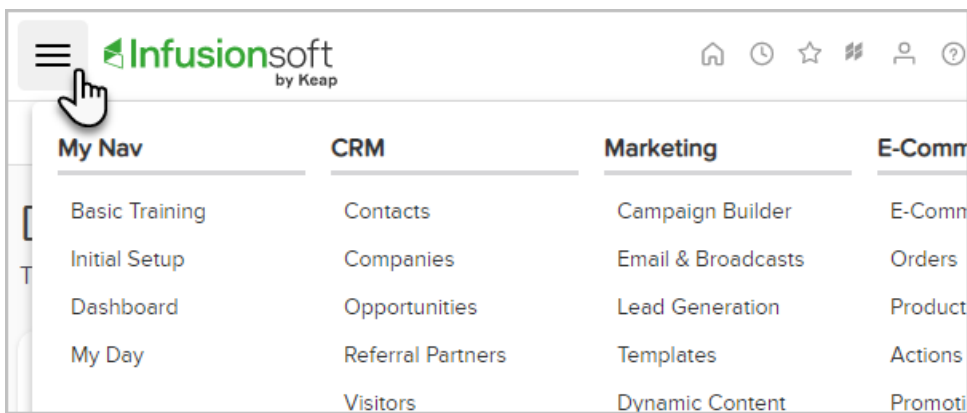
# Analytics

Creating custom dashboards is time consuming. Learn more about your business with less effort with Analytics. Data is updated once a day at approximately 6am based on your application's time zone and can be used to inform critical decisions about your business. Analytics includes four dashboards: **Overview**, **Contact growth**, **Email deliverability**, and **Payments, revenue, and refunds**.

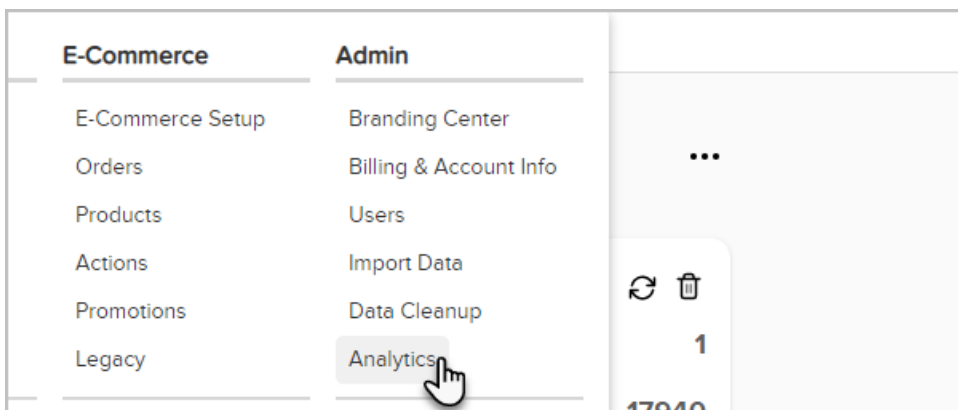
By default, Analytics is only available to Admin users, however you can grant permission to view Analytics to other users.

## Access Analytics

1. Open your main navigation menu



2. Click **Analytics** under the Admin section



3. Click the desired Analytic to view it

# Analytics

## Overview

Get a glimpse of the most important data from each area of your business.

## Contact growth

See how your contact growth is performing right now, and how it's tracking over time.

## Email deliverability

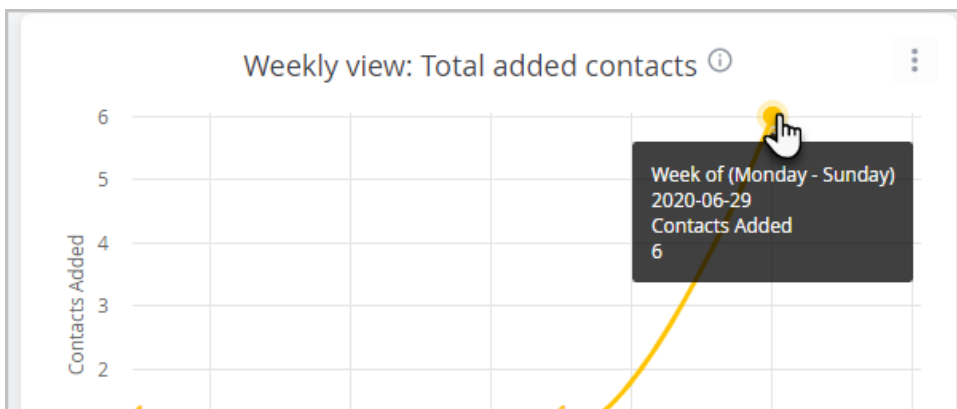
See the impact of your email efforts, from activity to status to performance.

## Payments, revenue, and refunds

Track the financial impact that payments, refunds, and revenue is having on the health of your business.

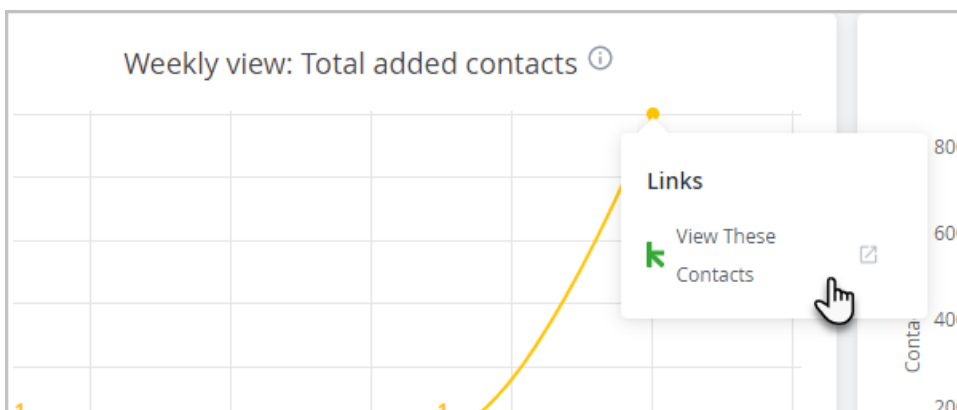
## General tips

Analytics are interactive! Hover your cursor over a data point to see what information it represents.



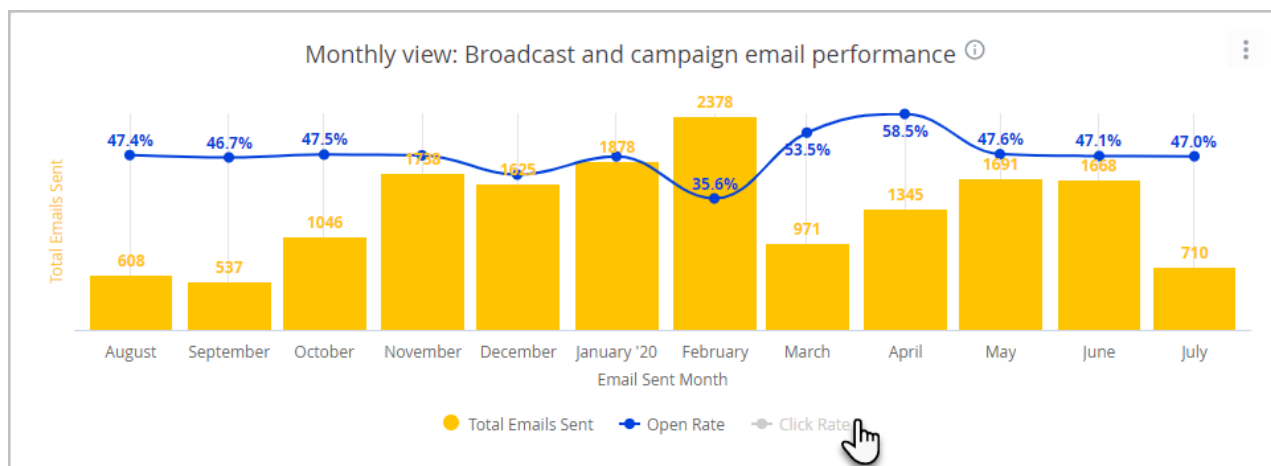
Click a data point and click **View These Contacts** to see a report for the data point.

**Note:** Because your dashboards are updated each morning the current day's activity, such as new contacts added to your application or payments received, will not be reflected in Analytics immediately



To remove a data set from a chart, click the set's label once. To add the data set back to the chart, click the set's

label again.



## Overview

The Analytics overview dashboard is a high-level summary of the most important data from the Contact growth, Email deliverability, and Payments, revenue, and refunds dashboards.

Charts included on this dashboard:

- **Total number of added contacts** for yesterday, this week and this month
- **Monthly view: Total added contacts** - Use this data to see your month over month contact growth patterns.
- **Total number of emails sent and their respective open rates** for yesterday, this week and this month
- **Weekly view: Broadcast and campaign email performance** - See how your (combined) broadcast and campaign emails are performing on a weekly basis based on open rates and click rates.
- **Total number of payments and their respective total dollar amounts** for yesterday, this week and this month
- **Revenue Month over Month** - Get a total picture of your monthly earned revenue, comparing invoice payments and processed refunds

## Contact growth

The Contact growth dashboard can help you understand how your list growth is trending from one day, week, or month to the next. It provides the ability to identify trends and baselines that can help your small business make data driven decisions.

Analytics on this dashboard are based on contact searches filtered by the date created field.

Charts included on this dashboard:

- **Daily view: Total added contacts** - Use this data to see patterns and track them back to your sales and marketing activity.
- **Weekly view: Total added contacts** - See how your growth compares from one week to the next.

- **Monthly view: Total added contacts** - Use this data to see your month over month contact growth patterns.
- **Yearly view: Total added contacts** - Take a look at the growth of your business over time to get a big-picture assessment of your efforts.
- **2-month comparison: Total added contacts** - Compare your last 2 months to see how your performance is tracking, up until yesterday.

## Email deliverability

The Email deliverability dashboard can be used to understand how your business' email sending habits affect email performance and engagement. It also provides a breakdown of your contact list by status, including marketable, non-marketable, spam complaints and more.

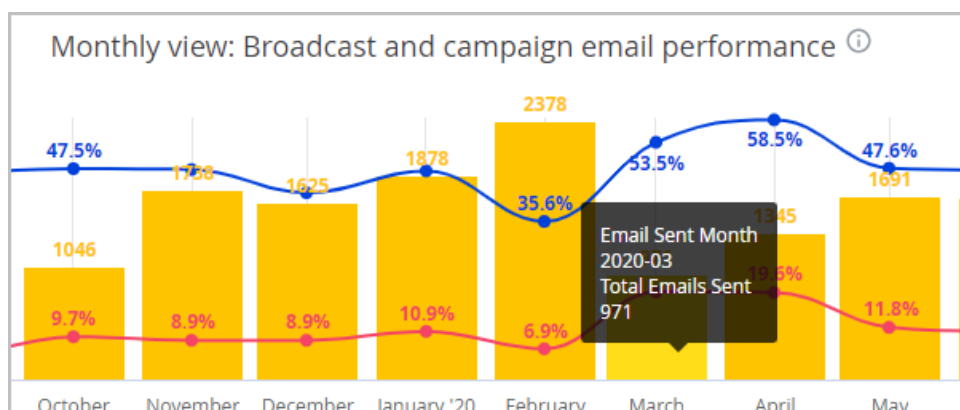
Analytics for emails sent, clicked or opened, are based on the email broadcast report and are filtered by date email was sent.

Analytics for contacts' email status and last email sent, clicked or opened are based on the email status report and are filtered by email status.

Charts included on this dashboard:

- **Monthly view: Broadcast and campaign email performance** - See how your broadcast and campaign emails are performing on a weekly basis based on open rates and click rates.
- **Email marketing status of your contacts** - Each of your contacts have a marketability status — some are system managed, and some are managed by you.
- **Weekly view: Broadcast and campaign email performance** - See how your (combined) broadcast and campaign emails are performing on a weekly basis based on open rates and click rates.
- **Open rate by day of the week (Last 90 days)** - Learn about the daily patterns that are most (and least) successful for your business.
- **Historical view of your engaged (and unengaged) contacts** - Charts which display contacts sorted by when they were last sent an email, last opened an email, and last clicked an email link.

**Note:** When viewing the weekly and monthly reports for broadcast and campaign email performance, the numbers you see on your dashboard and on the report will not appear to be in sync. The dashboard displays the total number of emails sent, seen in the screenshot below.



When viewing the report for March 2020, the email broadcast report displays 323 results. This discrepancy is because the report displays the number of email *batches* sent, which regularly include more than one email, as seen in the screenshot below.

Date <sup>?</sup>	Report	Sent By	Email Subject	Sent
3/31/2020 6:00 PM	<a href="#">View</a>	System	Thanks for joining us at the Aut...	10
3/31/2020 1:45 PM	<a href="#">View</a>	System	Time to join the webinar ~Contac...	3
3/31/2020 1:00 PM	<a href="#">View</a>	System	~Contact.FirstName~, just one ho...	3

## Payments, revenue, and refunds

The Payments, revenue, and refunds dashboard is best used to understand your business' week-to-date and month-to-date performance. As you review this dashboard, consider what adjustments you may need to make to hit your business goals.

Analytics on this dashboard are based on E-commerce payment reports and filter those reports by transaction date. For the purposes of these dashboards, a refund is considered to be any transaction where the **Pay Amt** is less than \$0.00.

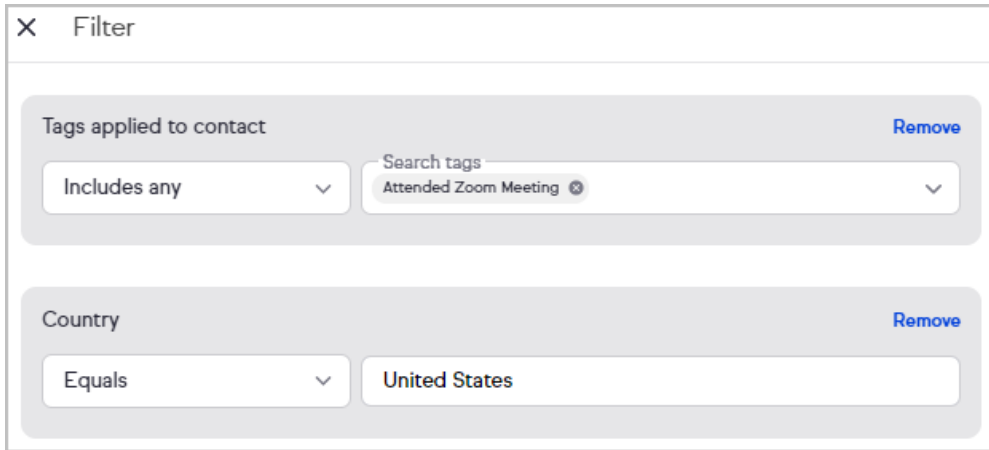
Charts included on this dashboard:

- **Monthly payments vs. refunds** - See how your monthly refunds impact your received payments to get a better picture of your gains and losses.
- **Weekly payments vs. refunds** - See how your weekly refunds impact your received payments to get a better picture of your gains and losses.
- **Revenue Month over Month** - Get a total picture of your monthly earned revenue, comparing invoice payments and processed refunds
- **Weekly view: Total revenue** - Get a total picture of your weekly earned revenue, comparing invoice payments and processed refunds
- **2-month comparison: Total number of payments** - Compare your last 2 months to see how your payments are tracking, up until yesterday.
- **2-month comparison: Sum of payments** - Compare your last 2 months to see how your payments are tracking, up until yesterday.

## Filters

You can modify what information is displayed in an Analytics dashboard by using filters. Filters are available on all

dashboards except for your Overview. You can combine multiple filters to hone in on the specific data you need.



Available filters:

**Contact Growth:** Date Added, Tags, Email domain, Person type, Country, State, City, Postal code, Anniversary

**Email Deliverability:** Date Sent

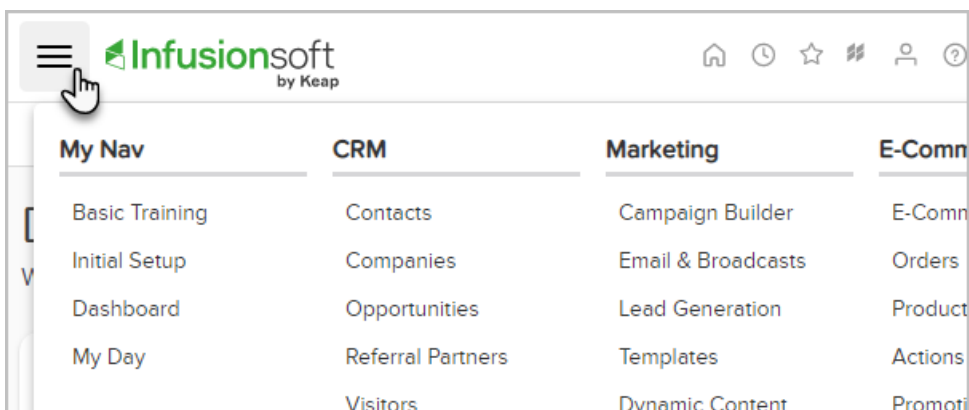
**Payments, Revenue, & Refunds:** Date of payment, Amount of payment, Amount of refund, Tags

## Provide feedback

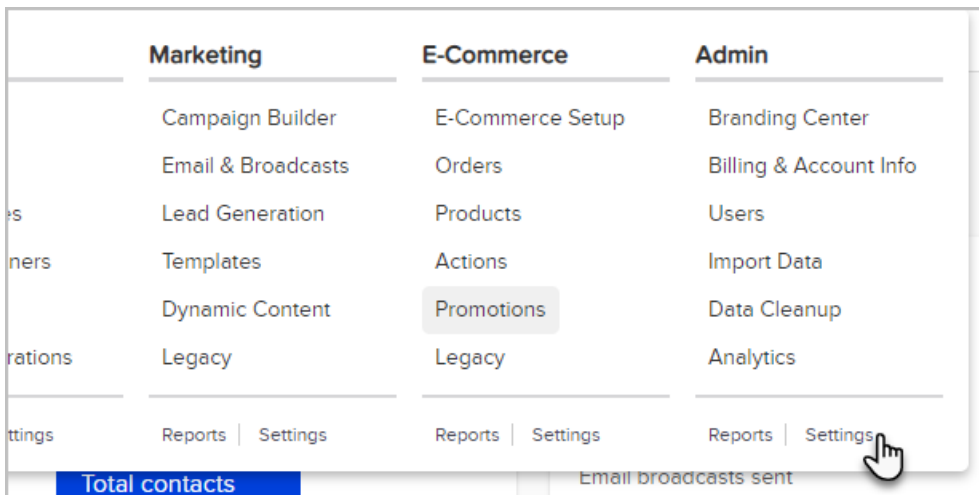
Our team is hard at work at enhancing Analytics and would greatly appreciate any feedback you have to offer. You may provide feedback directly to our product team from any Analytics dashboard by clicking the **Feedback** link in the upper-right corner.

## Grant permission to access Analytics

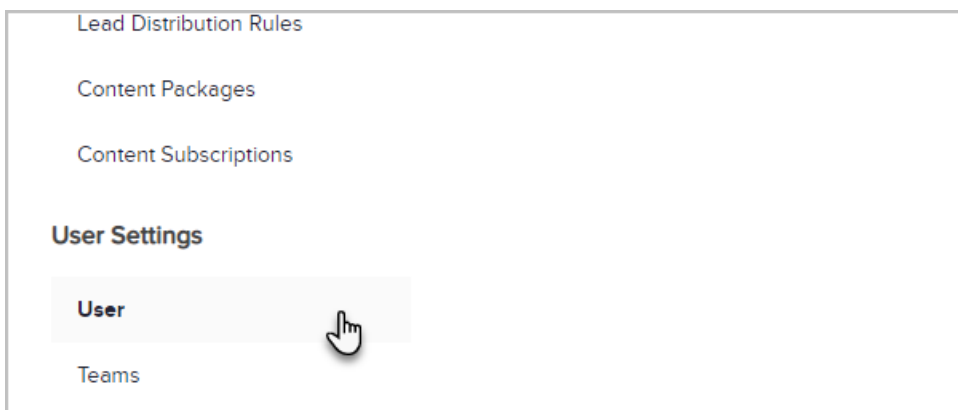
1. Open the main navigation menu



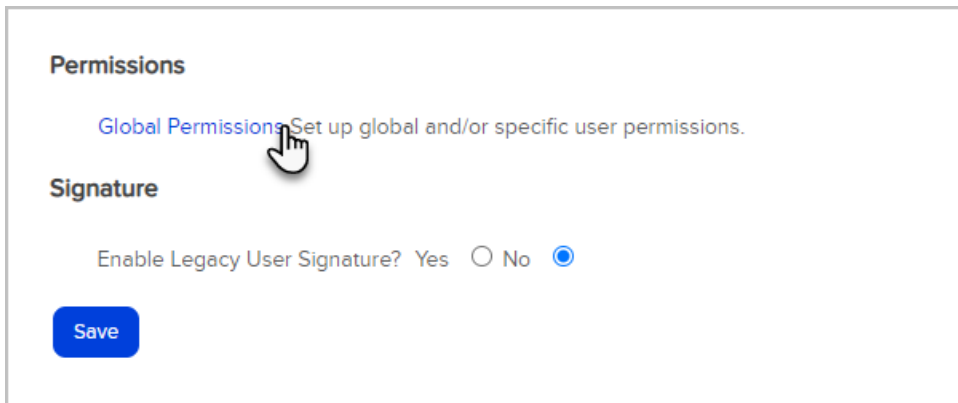
2. Click Admin > **Settings**



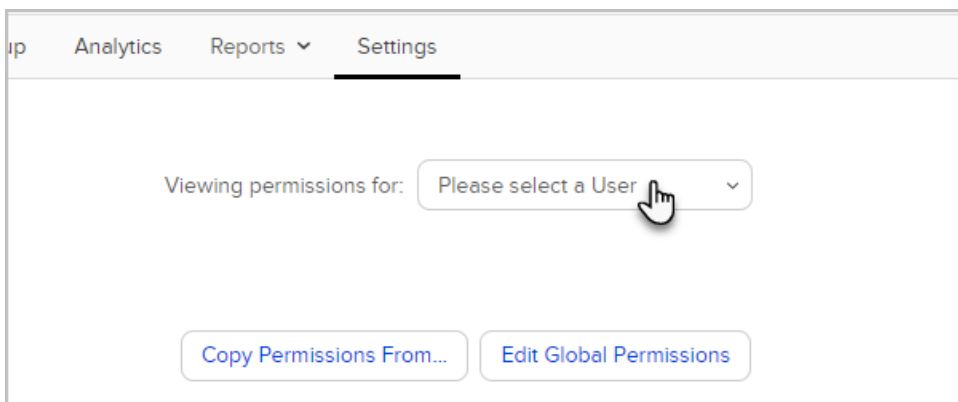
3. Select User Settings > User



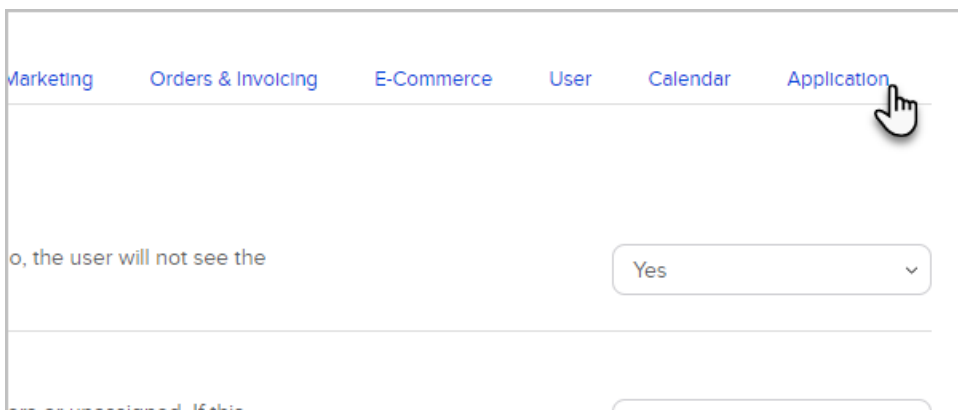
4. Click Global Permissions



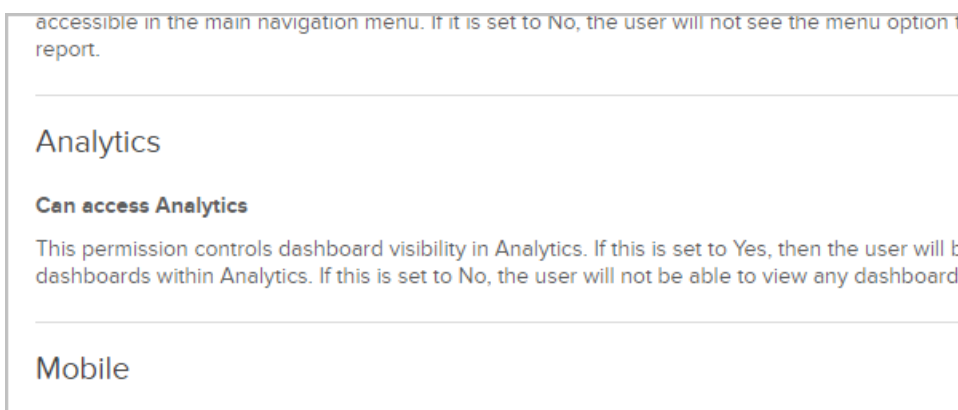
5. Select a user to modify permissions for



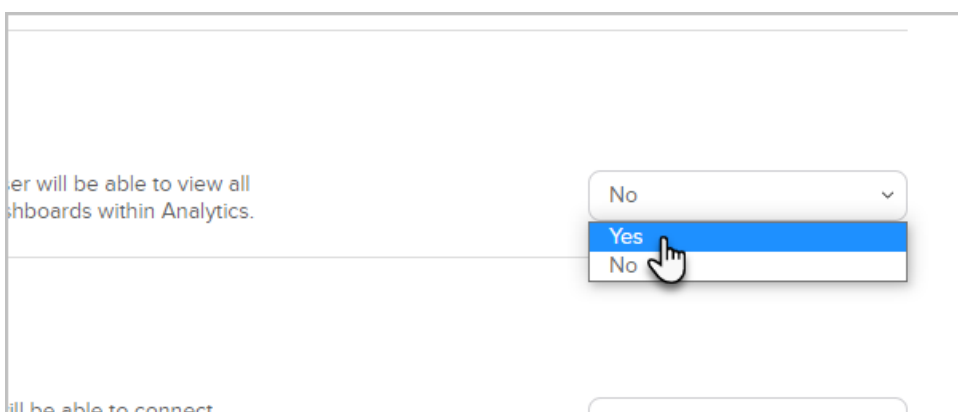
6. Click the Application tab



7. Scroll to the **Analytics** section



8. Select **Yes**



## FAQs

### When does Analytics update?

Your Analytics dashboards are updated daily by 6 am in your app's time zone.

### When I click View These Contacts, the number in the report is different from my dashboard. Why?

Because your dashboards are updated each morning the current day's activity, such as new contacts added to your application or payments received, will not be reflected in Analytics immediately.

### Can I customize my dashboards?

We are exploring different options for customization. If customization is important to you, please provide feedback through the form on the Analytics page.



