XMPie PE v8 Training Series

Transcript for: Adding Marketing Console reports

Notices

Voice over script	Thumbnail
Hi! Welcome to XMPie PersonalEffect version 8. In this tutorial we create a new Marketing Console report and add it to the Circle project.	
Once you have processed an email or print document in Circle, or after you have created a personalized website, and browsed to a tracked page, you are ready to start creating campaign reports in Marketing Console.	
Login and	
select the relevant account and campaign.	
Marketing Console has two user levels – Analyst and Operator. To create your reports your user level needs to be set to Operator.	
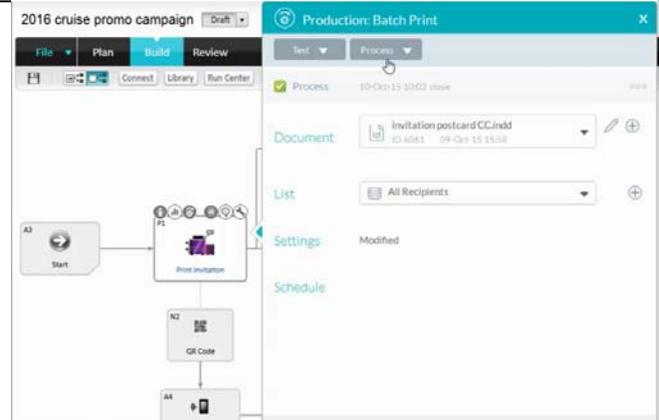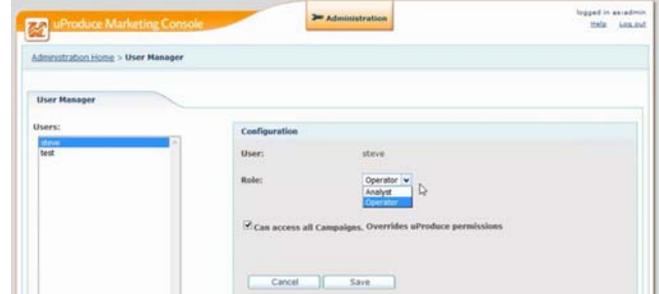
If you don't see these report types, you need to get your Administrator to change your user account role to Operator.	
Select the type of report you want to create. I will do a print population report on the invitation postcards that I just processed. Set any conditions if needed, and select the chart type and grouping. Run the report.	
When you are happy with the results, click to save the report.	
For Circle to see the report, you need to check the box to add the report to the dashboard. Your new report will appear in the custom reports list, and also in the Marketing Console Dashboard.	
Back in Circle, you can now use the chart icon on any of the Touchpoints.	
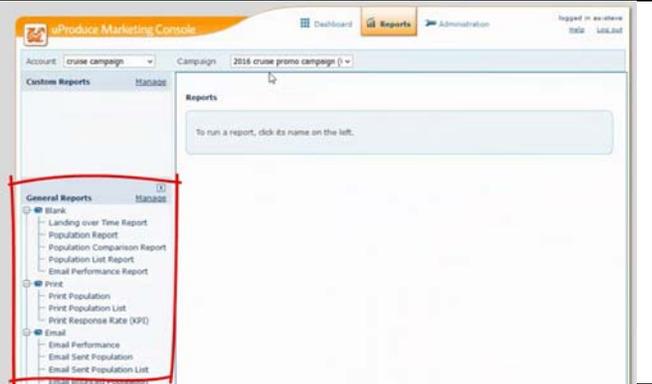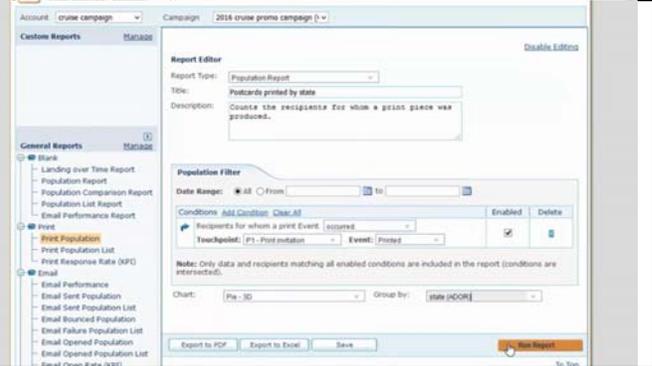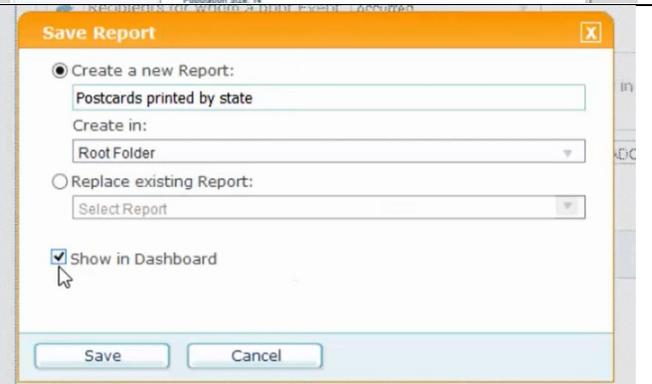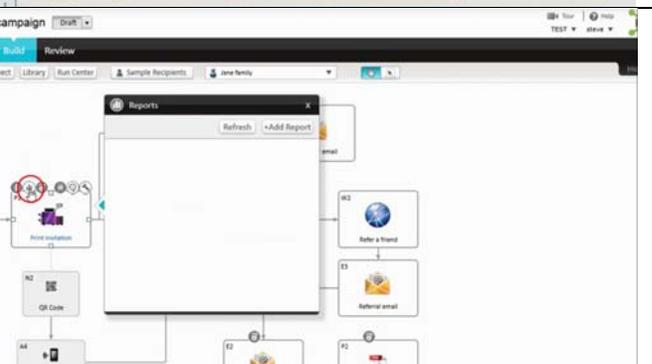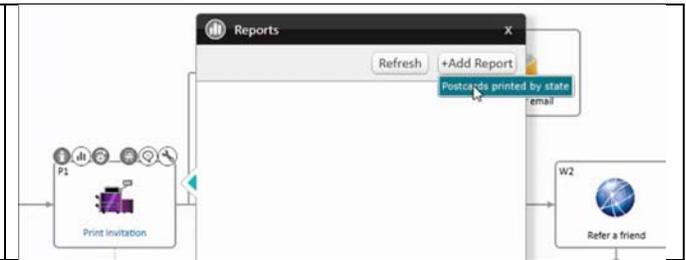
Since this chart relates to the Print invitation, I will add the chart here.	
You can now continue and setup more reports for other Touchpoints or add additional charts to the same Touchpoint.	