Dashboards With Slemma

A Retreaver Training Services Guidebook

Document Version 1.0

October 20, 2017

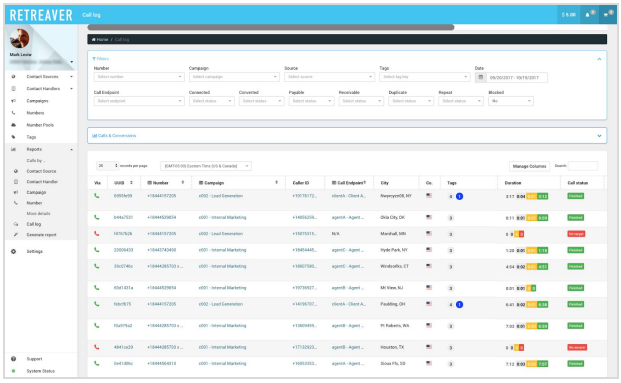
Guidebook: Dashboards With Slemma

Before You Begin

Retreaver Marketer helps companies gain insight into which online and offline campaigns are driving calls, and which of those calls are converting to sales, happy customers and positive business outcomes. Slemma's cloud-based platform helps you aggregate multiple data sources and present them in visually stunning dashboards and data presentations.

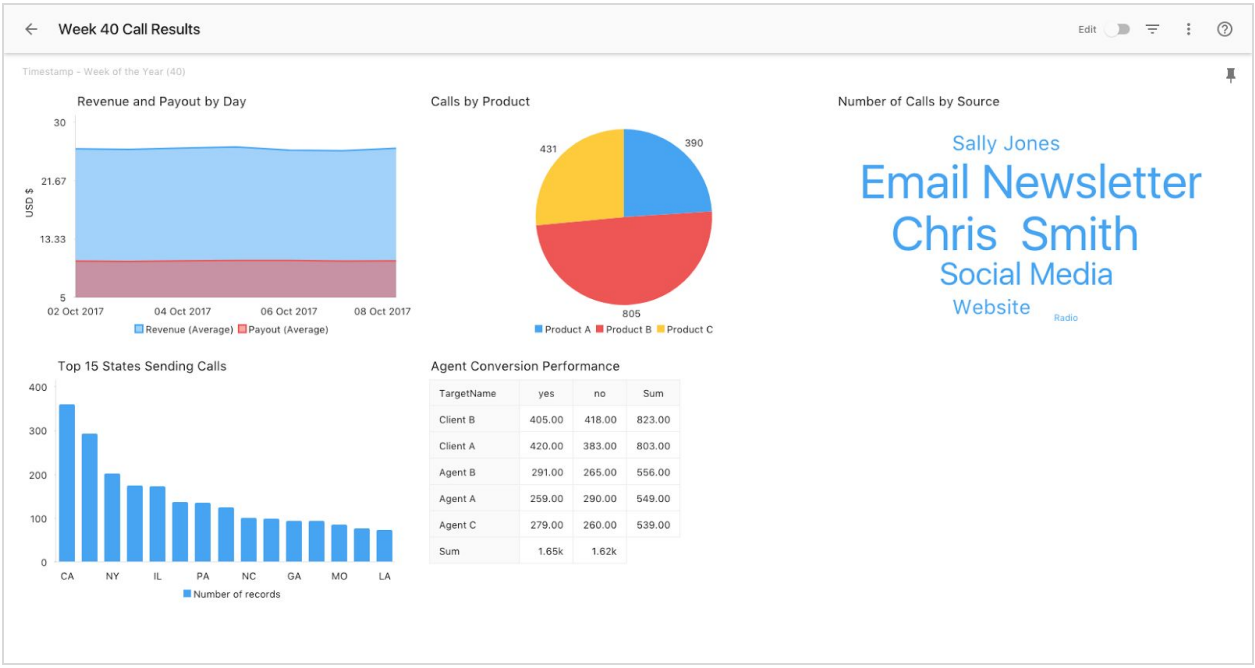
Retreaver presents an overview of your call activity through a real-time dashboard and detailed call log.

Real-time call dashboard shows live calls, agents and sources.



Detailed call log provides detailed data on every call.

When you export Retreaver call data into Slemma, you are able to fully take advantage of the data you have captured with calls by creating custom visualizations by state, caller city, custom tags, date ranges and put that information side by side with your other data sources.



TargetName	yes	no	Sum
Client B	405.00	418.00	823.00
Client A	420.00	383.00	803.00
Agent B	291.00	265.00	556.00
Agent A	259.00	290.00	549.00
Agent C	279.00	260.00	539.00
Sum	1.65k	1.62k	

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This guide walks you through, step-by-step, how to quickly bring data from your Retreaver account into Slemma for use in dashboards aligned to your specific business.

Requirements
In addition to your Retreaver account, to complete the configuration exercises described in this Guidebook you will also need:

- A Slemma account. Sign up here for a free 14-day trial and use promo code **RetreaverPromo** to receive 50% off your first month when you decide to subscribe.

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Terminology

The following terms are used throughout this Guidebook, the Retreaver Knowledge Base, and Retreaver documentation. Recognizing each of our customer's businesses are different, we've highlighted commonly used and similar terms for reference:

- **Contact Sources:** The partners, people, and channels that you need to track as the sources of inbound calls. Also referred to as - Publishers, Sources, Affiliates, Channels.
    - **Payout**: Amount you pay for each converted lead. For internal campaigns, it may be the average cost of ad placement, for partners the amount you pay them for the lead.

- **Contact Handlers:** The call centers, partners, people or agent who will be receiving calls coming in from your Contact Sources. Also referred to as - Call Handlers, Call Endpoints, Agents, Call Buyers.
    - **Revenue:** Amount you earn for each converted lead. Whether this is the sale value or LTV(Lifetime Value) of a new customer, or the revenue you earn from a buyer paying you for leads.

- **Numbers:** Static local phone numbers, toll-free phone numbers or SIP addresses from where a call may come. You may port existing numbers into your account or purchase new Numbers directly from within your Retreaver account.

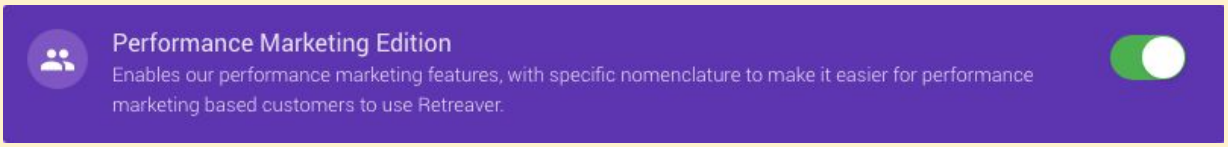
- **Number Pools:** A set of Numbers used to capture dynamic/real-time information from mobile or other digital landing pages. A temporary number is presented and tagged for callers like a "session cookie" so you can know more about who is calling and what they are calling about.

- **Campaigns**: These are the configured business rules, workflows, that are applied when a Caller dials a Number that is presented by a Contact Source in order to get them to the best Contact Handler to take their call. You can create as many campaigns in Retreaver as you like.

- **Tags:** Tags are data points that are attached to calls and used in reporting, routing and identifying the best Contact Handler to answer the call.

- **Knowledge Base:** Also referenced as KB. The support portal for Retreaver Customers contains a number of articles and instructions for completing various tasks in Retreaver.

Tip: If you are a performance marketer using the nomenclature of Publishers and Buyers, go to the upper right or your screen an click the shopping cart icon. Then switch the toggle to turn on *Performance Marketing Edition***.**



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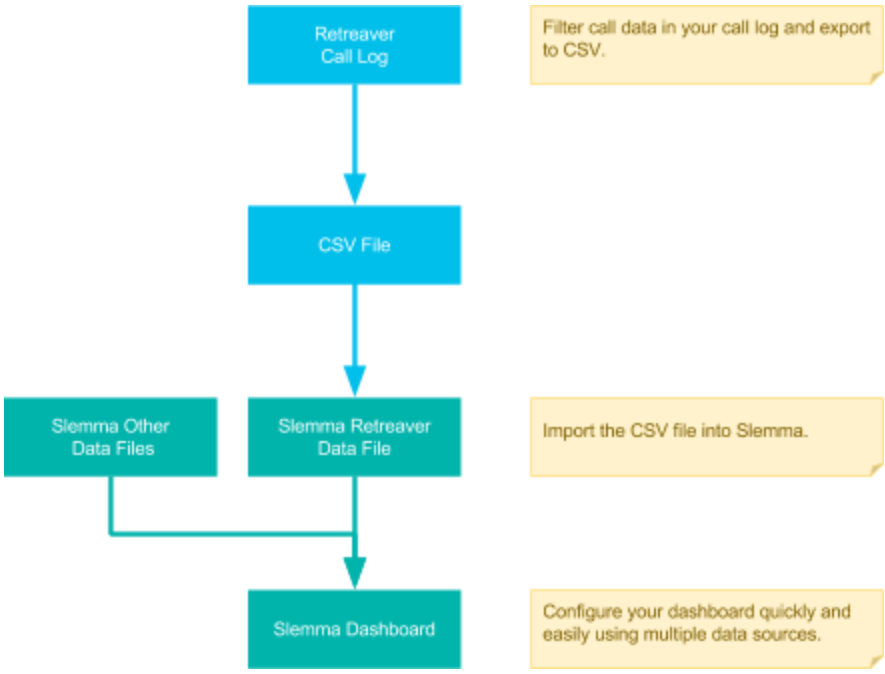
Concepts

Retreaver delivers the capability to export call logs and reports. Each report, from CSV format may be imported into Slemma using their file-based import wizard.



Relevant Information & Resources

To help prepare for using Slemma to report your call data, start by gathering the relevant information. While this guidebook will walk you through the basics of getting data from Retreaver into your Slemma account and creating a simple dashboard. The following are some specific resources to help you get even more out of your Slemma account.

Resource	Information
Slemma Promo Code	Use **RetreaverPromo** when adding your subscription for the first time
Slemma Knowledge Base	https://support.slemma.com/
How to Create Dashboard	https://support.slemma.com/knowledge_base/topics/how-to-create-a-dashboard
Dynamic Filtering	https://support.slemma.com/knowledge_base/topics/dynamic-filtering

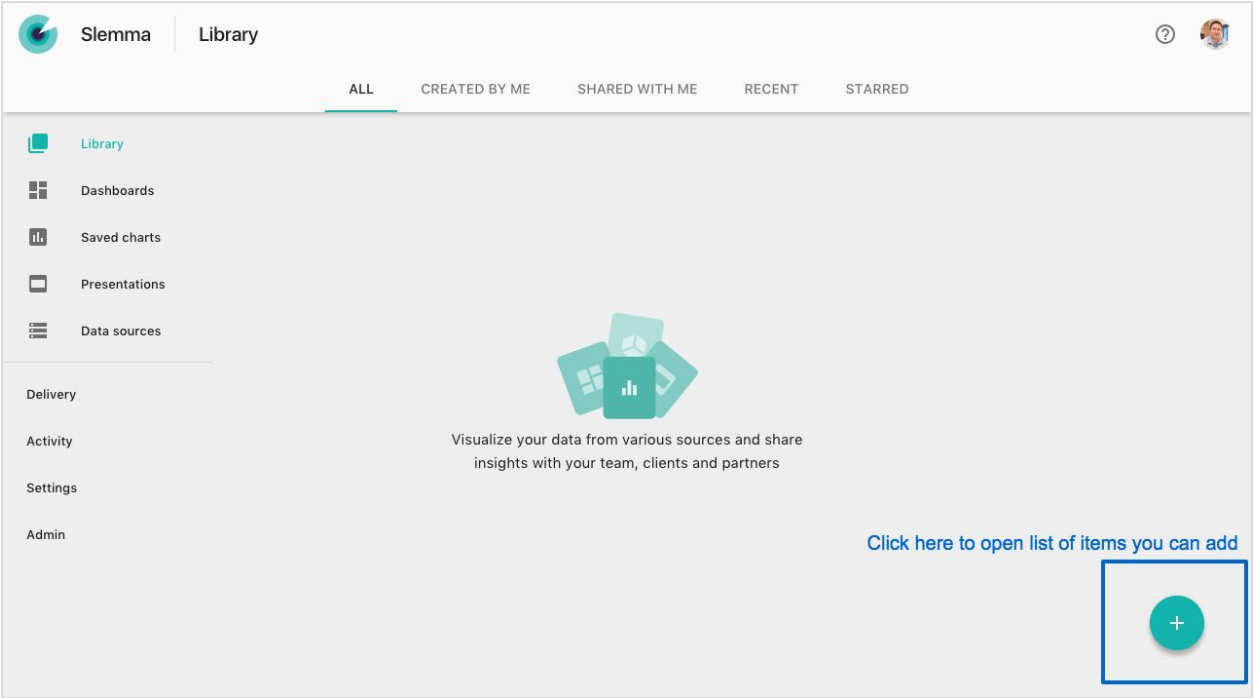
PART I: Getting Data from Retreaver Into Slemma

Exporting Retreaver Call Log Data

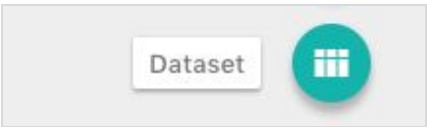
- [ ] Open your Retreaver Call Log.
- [ ] Apply filters to select the data you want to include in your export file.
- [ ] Scroll to the bottom and export your call log to CSV format.
- [ ] Unzip the CSV file.

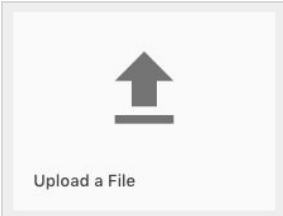
Importing to a File Data Source

- [ ] Open Slemma and click on the green circle in the lower right.



- [ ] Select Dataset, then select Upload a File.





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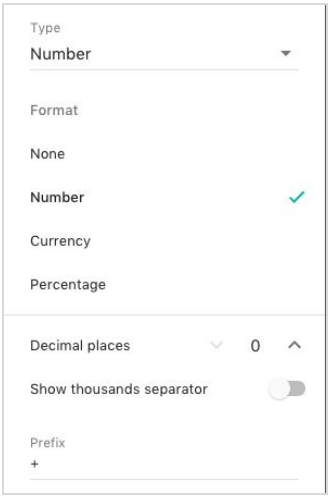
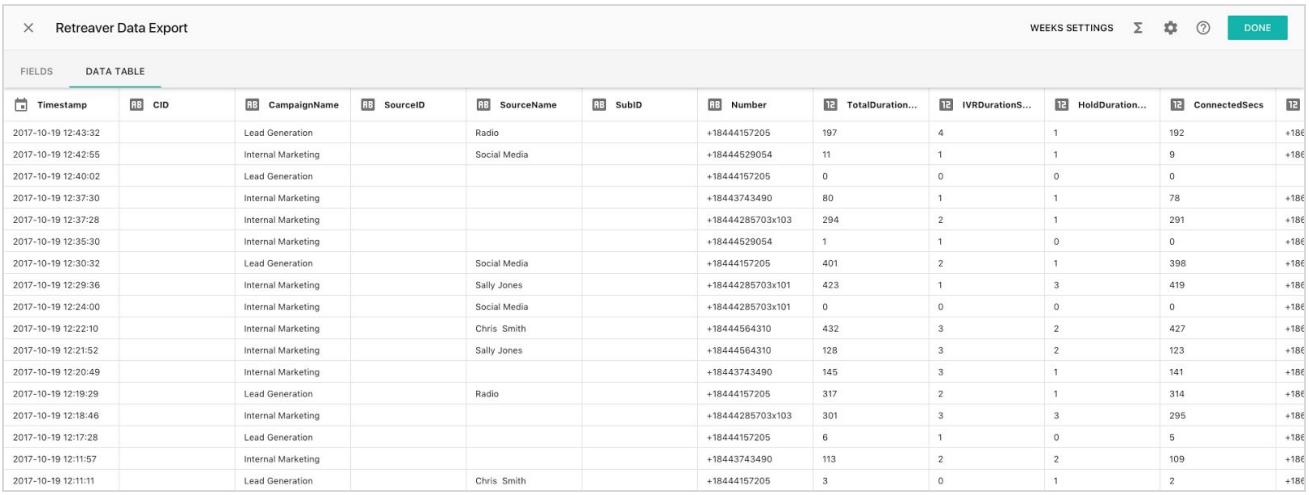
- [ ] Choose the unzipped export file from Retreaver. This will load the file in a “Fields” view. For each of the following fields:
    - Number
    - ConnectedTo
    - ReceivedCallerID
    - SentCallerID

You will want to format these to not show as numbers with comma separators. To do this:

- Click on the field.
- Change the Type to ‘Number’
- Make the Format ‘Number’
- Change Decimal places to 0
- Turn off the thousands separator
- Add the prefix of +



- [ ] Click on the Data Table tab beside Fields. You will see your data presented in a table.



Timestamp	CID	CampaignName	SourceID	SourceName	SubID	Number	TotalDuration...	IVRDurationS...	HoldDuration...	ConnectedSecs	
2017-10-19 12:43:32		Lead Generation		Radio		+18444157205	197	4	1	192	+186
2017-10-19 12:42:55		Internal Marketing		Social Media		+18444529054	11	1	1	9	+186
2017-10-19 12:40:02		Lead Generation				+18444157205	0	0	0	0	
2017-10-19 12:37:30		Internal Marketing				+18443743490	80	1	1	78	+186
2017-10-19 12:37:28		Internal Marketing				+18444285703x103	294	2	1	291	+186
2017-10-19 12:35:30		Internal Marketing				+18444529054	1	1	0	0	+186
2017-10-19 12:30:32		Lead Generation		Social Media		+18444157205	401	2	1	398	+186
2017-10-19 12:29:36		Internal Marketing		Sally Jones		+18444285703x101	423	1	3	419	+186
2017-10-19 12:24:00		Internal Marketing		Social Media		+18444285703x101	0	0	0	0	+186
2017-10-19 12:22:10		Internal Marketing		Chris Smith		+18444564310	432	3	2	427	+186
2017-10-19 12:21:52		Internal Marketing		Sally Jones		+18444564310	128	3	2	123	+186
2017-10-19 12:20:49		Internal Marketing				+18443743490	145	3	1	141	+186
2017-10-19 12:19:29		Lead Generation		Radio		+18444157205	317	2	1	314	+186
2017-10-19 12:18:46		Internal Marketing				+18444285703x103	301	3	3	295	+186
2017-10-19 12:17:28		Lead Generation				+18444157205	6	1	0	5	+186
2017-10-19 12:11:57		Internal Marketing				+18443743490	113	2	2	109	+186
2017-10-19 12:11:11		Lead Generation		Chris Smith		+18444157205	3	0	1	2	+186

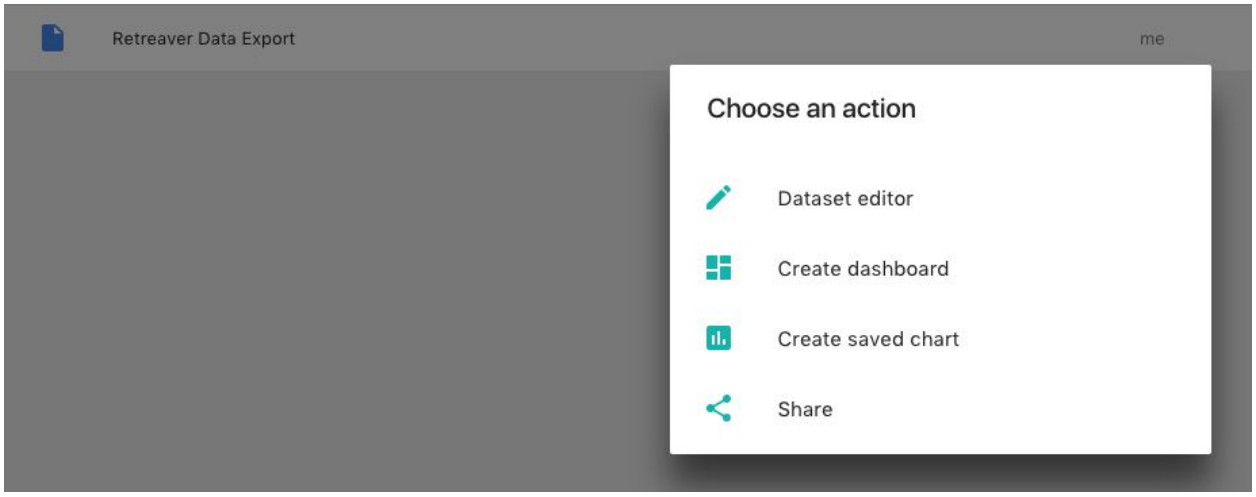
Once happy with the way your content looks, rename the data set by clicking on the file name in the top left and click Done.

You now have a data set ready to use for your Charts, Dashboards, etc.

PART II: Configuring Charts & Visualizations

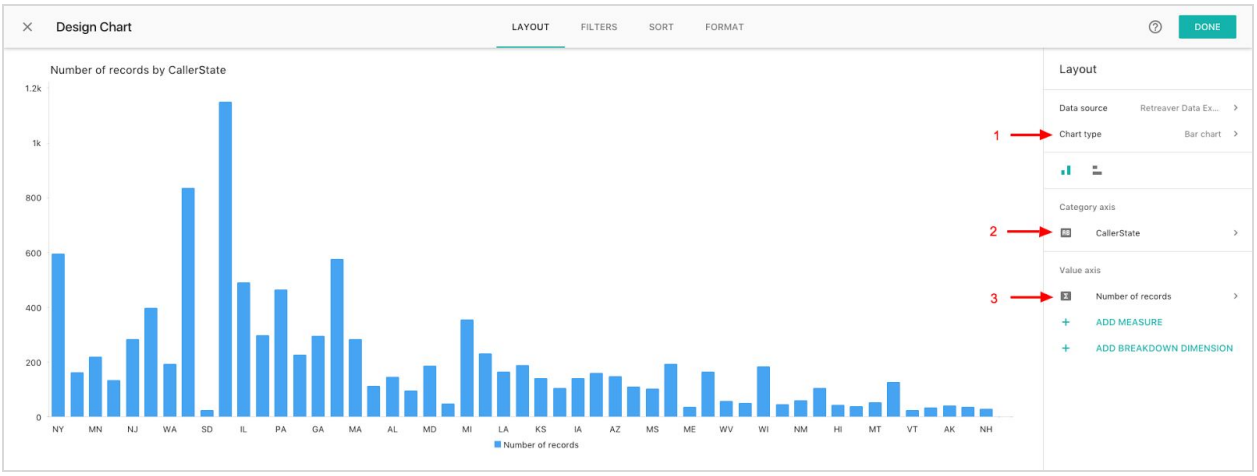
Slemma provides the capability to create any number of visualizations for your call data. Here are a handful of commonly requested charts for Retreaver Call Data. To get started with any chart:

- [ ] Click on the Dataset to open a menu of actions. Select “Create saved chart”.

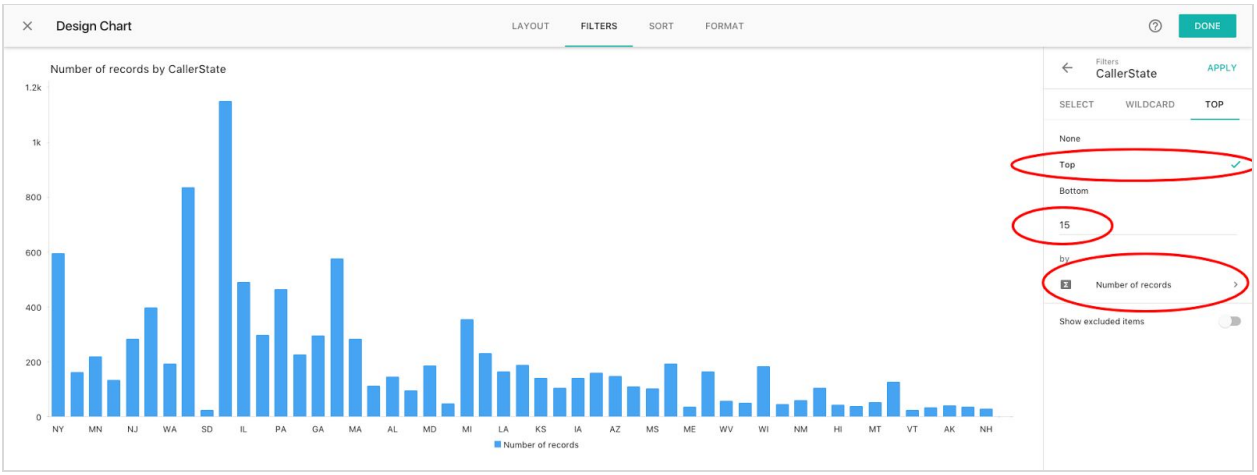


Top States Sending Calls (Bar Chart)

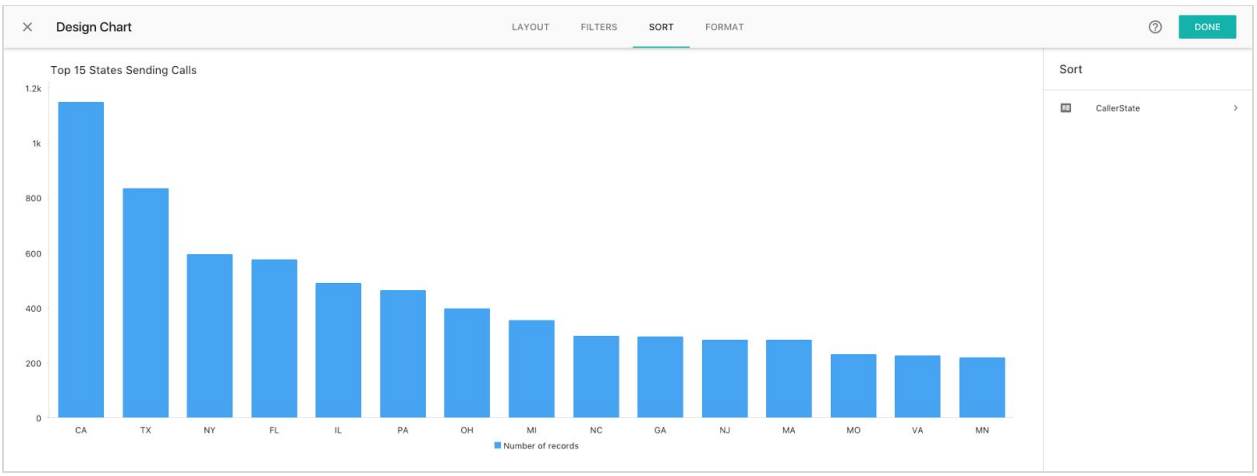
- [ ] The default Chart Type is Bar Chart. Leave this setting.
- [ ] Click on Add Dimension. Select CallerState.
- [ ] Click on Add Measure. Select Number of Records. This is the number of calls.



- [ ] Go to the tab “Filters”. Select CallerState. Click the tab Top, then select Top as criteria below. Change the number to 15 for the top 15 states sending calls. Click Apply.



- [ ] Go to the tab “Sort”. Select CallerState. Sort by Measure and order by Descending. Click Apply.

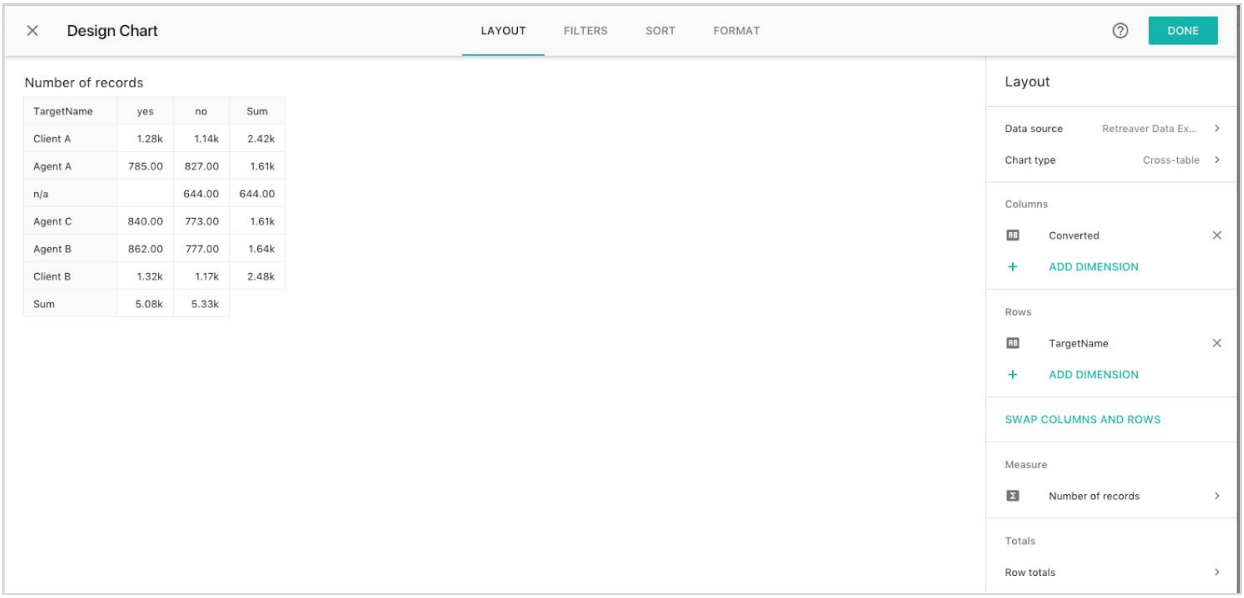


- [ ] Click Done. Update the Title of the chart to “Top 15 States Sending Calls”.

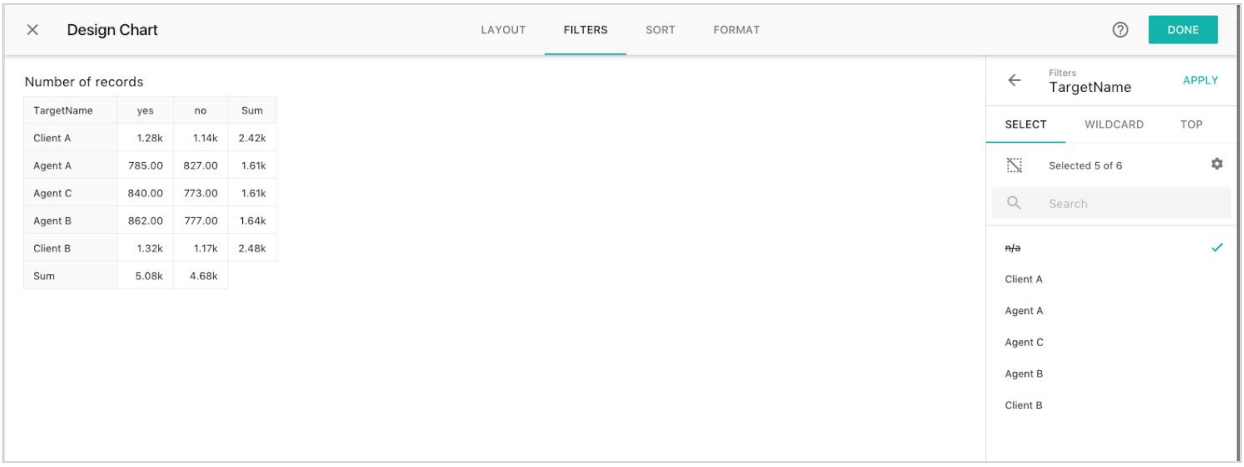
You now have a Saved Chart available to be filtered and used in your Dashboards. Give your Chart a name and click save. Click the arrow in the top left to go back to your Slemma Library.

Top Agents Converting Calls (Cross-table Chart)

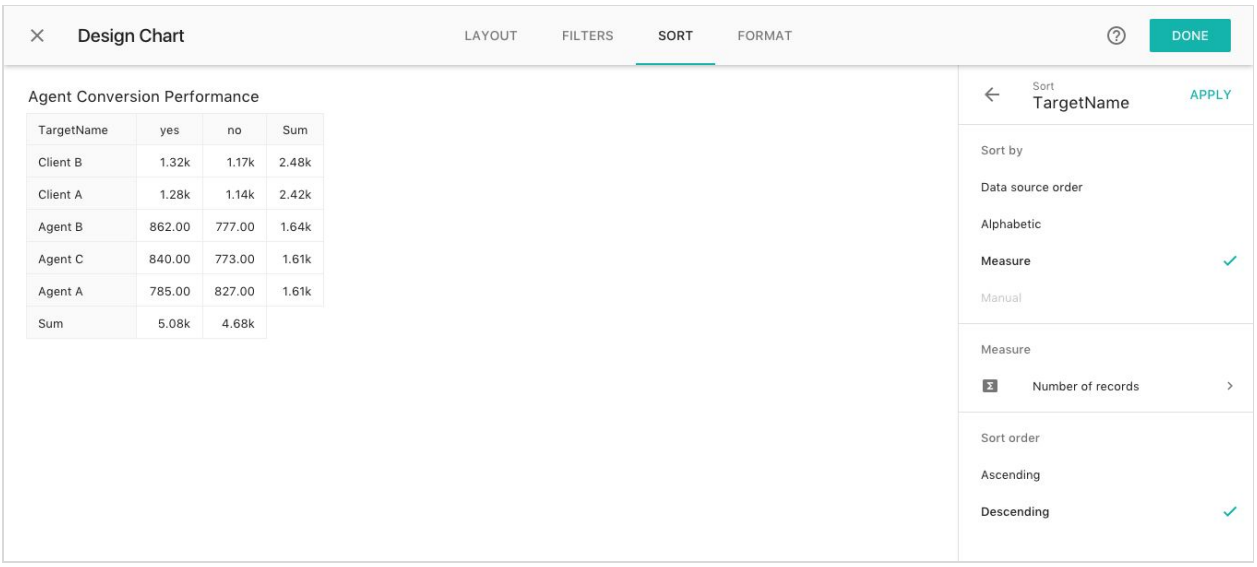
- [ ] Change the Chart Type to Cross-table.
- [ ] In the Columns section click Add Dimension. Select Converted.
- [ ] In the Rows section click Add Dimension. Select TargetName.
- [ ] In the Measure section click Add Measure. Select Number of Records. This is the number of calls.
- [ ] In the Totals section. Add Row and Column totals that are Sum.



- [ ] Go to the tab “Filters”.
    - Select TargetName.
    - Click on the settings (gear) and change to “Exclude”.
    - Select any agents you don’t want included in results (we selected n/a since these were calls that were not connected to an agent)
    - Click Apply



- [ ] Go to the tab “Sort”.
    - Select TargetName.
    - Select Measure.
    - Select Descending.
    - Click Apply. This will order the agents by calls.
    - Select Converted.
    - Select Alphabetic.
    - Select Descending.
    - Click Apply. This will put Yes first and No second in the columns.



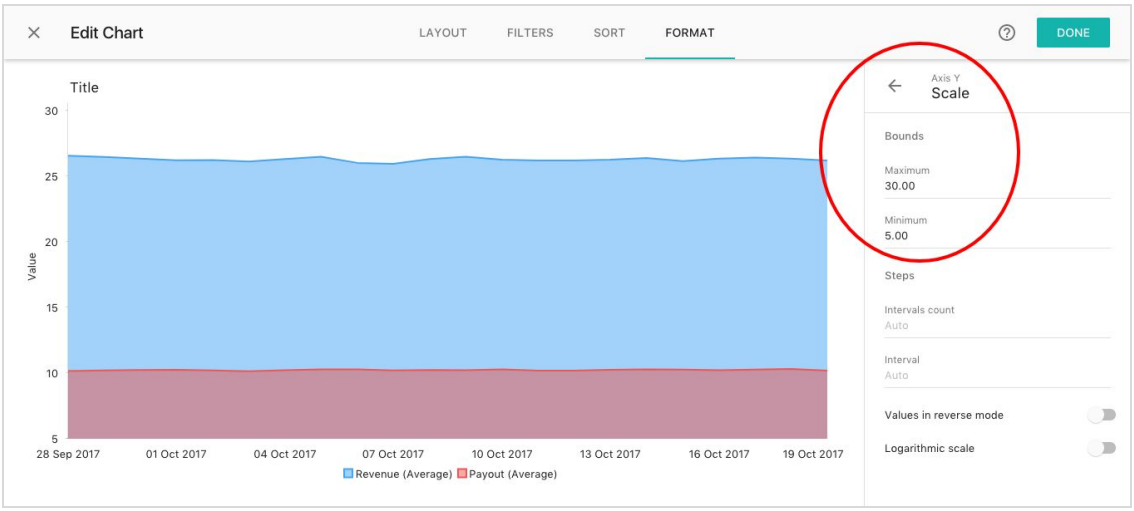
- [ ] Click Done. Update the Title of the chart to “Top Converting Agents”.

You now have a Saved Chart available to be filtered and used in your Dashboards. Give your Chart a name and click save. Click the arrow in the top left to go back to your Slemma Library.

Average Daily Revenue and Payout (Time Series / Line Graph)

- [ ] Change the Chart Type to Time Series.
- [ ] In the Time Axis section leave the default: Timestamp (Days)
- [ ] In the Value Axis section click Add Measure. Select Revenue and select Average. Repeat for Payout.

- [ ] Format the Y Axis by clicking on the numbers at left. Select Format.
  - Click Scale to adjust your scale if needed.

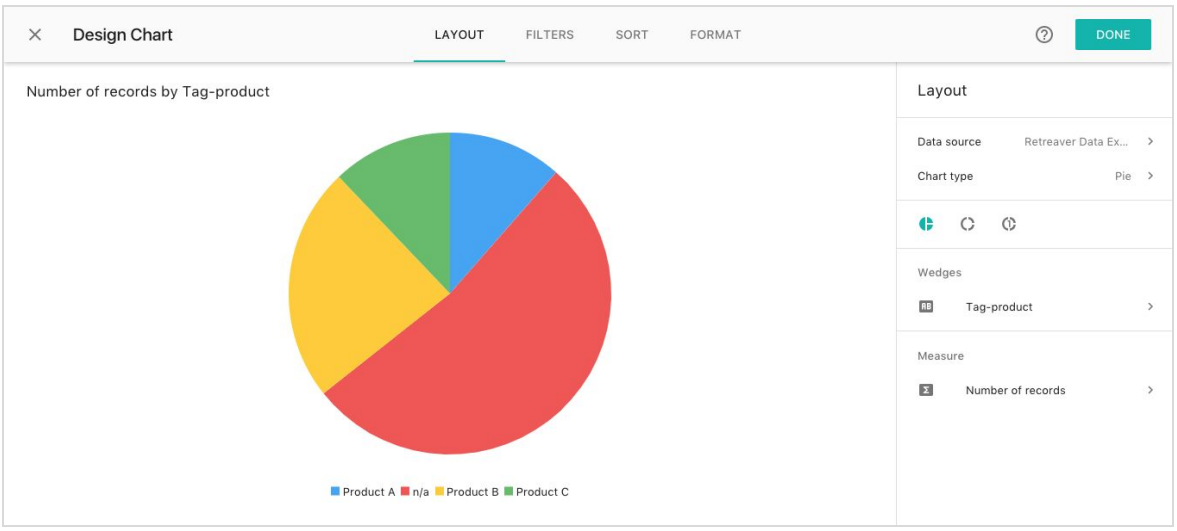


- [ ] Click Done. Update the Title of the chart to “Revenue and Payout by Day”.

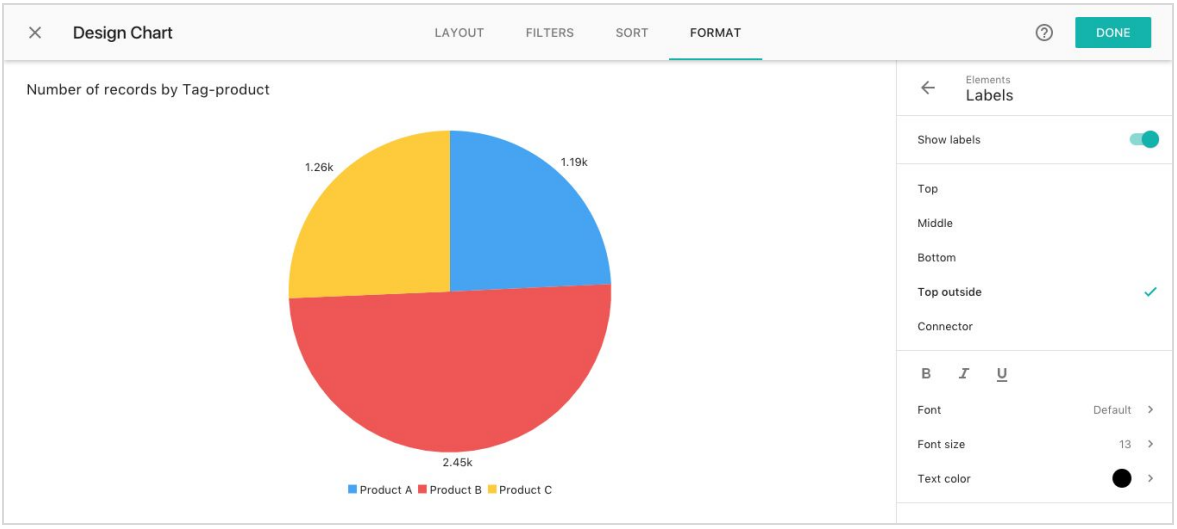
You now have a Saved Chart available to be filtered and used in your Dashboards. Give your Chart a name and click save. Click the arrow in the top left to go back to your Slemma Library.

Calls by Product Tag (Pie Chart)

- [ ] Change the Chart Type to Pie.
- [ ] In the Wedges section click Add Dimension. Select Tag-Product. (Note you need to have a tag on your calls called Product configured. If you have another tag, use it.)
- [ ] In the Measure section click Add Measure. Select Number of Records.



- [ ] Go to the tab “Filters”. Select the products to include in your chart then click Apply.
- [ ] Go to the tab “Format”. Select Labels. Choose to show labels and Top outside.



- [ ] Click Done. Update the Title of the chart to “Calls by Product”.

You now have a Saved Chart available to be filtered and used in your Dashboards. Give your Chart a name and click save. Click the arrow in the top left to go back to your Slemma Library.

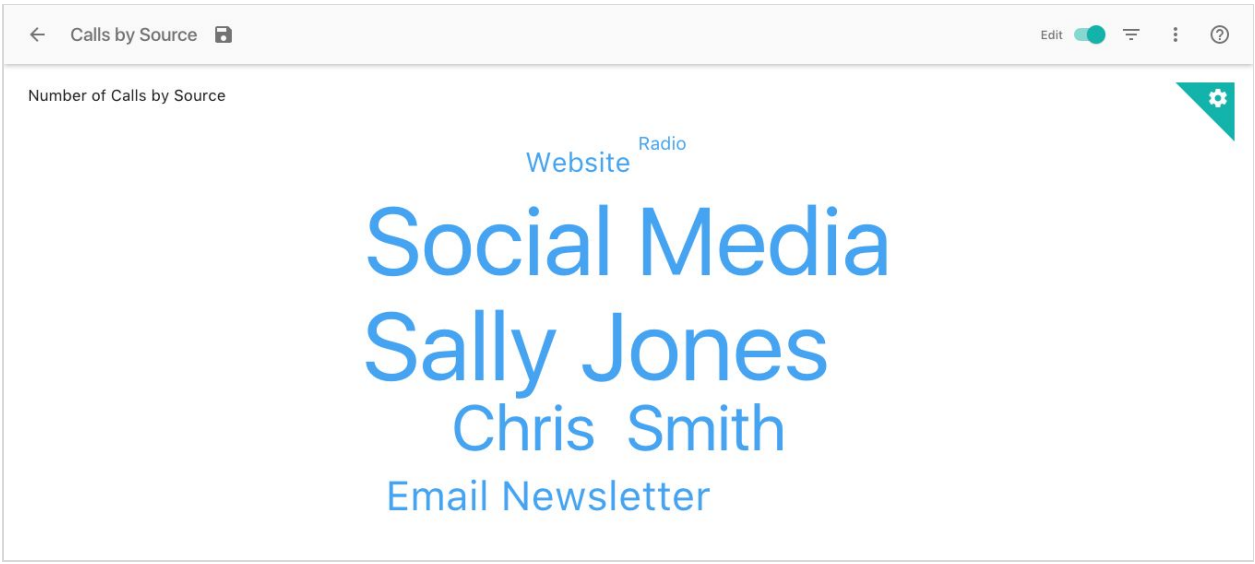
Calls by Source (Tag Cloud)

- [ ] Change the Chart Type to Word Cloud.
- [ ] In the Wedges section click Add Dimension. Select SourceName
- [ ] In the Measure section click Add Measure. Select Number of Records.

- [ ] Go to the tab “Filters”.
    - Select SourceName.
    - Click on the settings (gear) and change to “Exclude”.
    - Select any sources you don’t want included in results (we selected n/a since these were calls that were from a non-tracked source)
    - Click Apply

- [ ] Click Done. Update the Title of the chart to “Calls by Source”.

You now have a Saved Chart available to be filtered and used in your Dashboards. Give your Chart a name and click save. Click the arrow in the top left to go back to your Slemma Library.

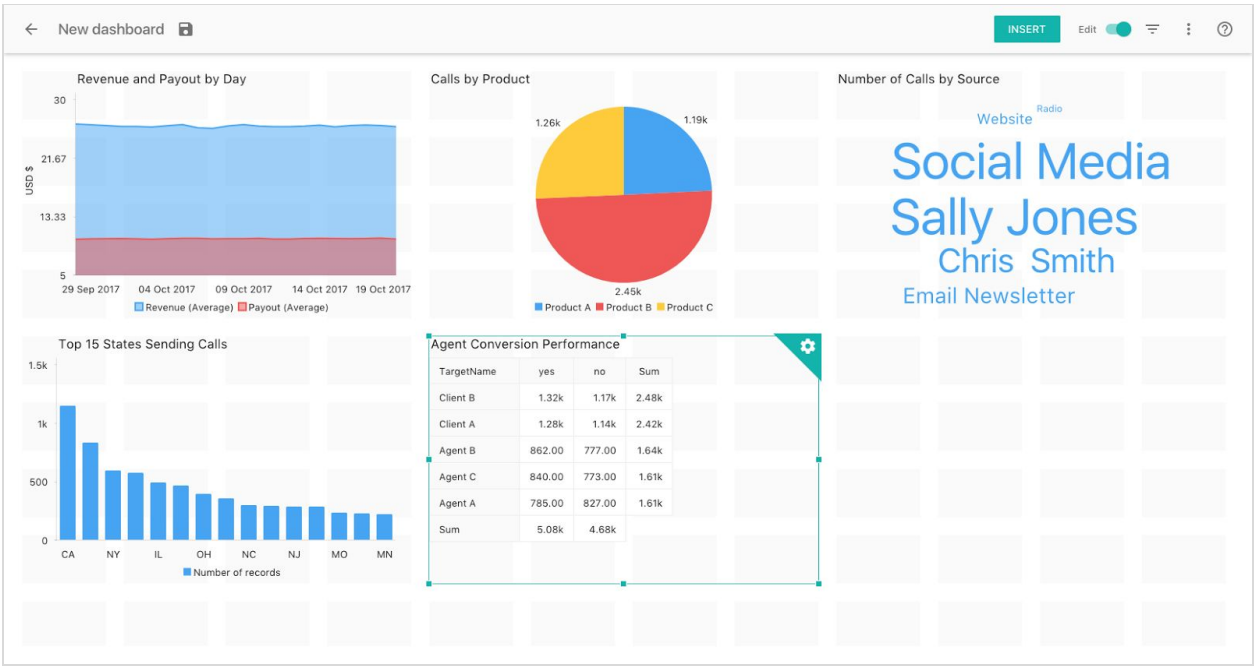


PART III: Building A Call Dashboard

Adding Charts

Now with all your Saved Charts you can quickly create a Dashboard to report your different call campaign statistics.

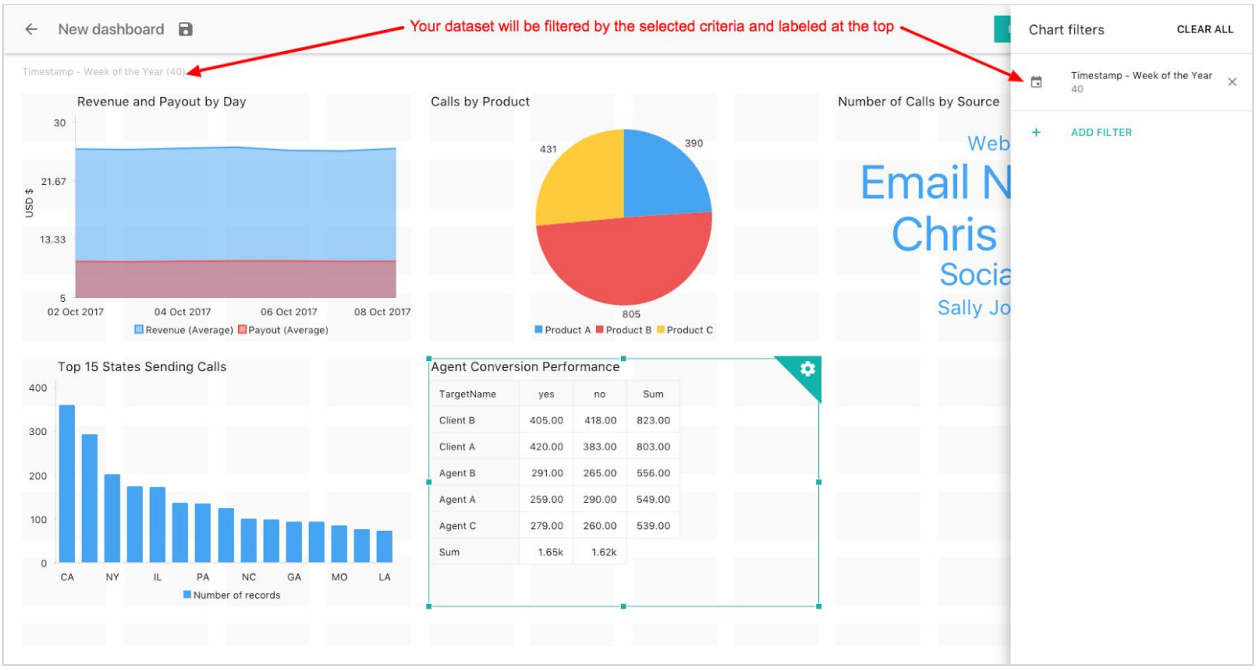
- ☐ From your Library or Data Sources, click on the Dataset you want to underly your dashboard.
- ☐ Choose Blank for the dashboard template.
- ☐ Click Insert, then select Saved Chart. Add the Saved Charts created in Part II until all are added to your dashboard. You can drag and drop them to where you need them to be.



Filtering Data in the Dashboard

- ☐ Filter the data to be a single week by clicking on the filter button.

- [ ] Select Timestamp Index. Then Select Week of Year. Then select a week number.



Your dashboard will update to reflect the selected week.

- [ ] Click on the “New Dashboard” title and name your dashboard report.
- [ ] Unselect the Edit toggle in the top right. You are now in your dashboard view.

Additional Slemma Resources

Our friends at Slemma have a number of additional resources available to help you do even more with your dashboards and reporting:

- Slemma Knowledge Base - Access a robust library of articles to help you with data sources, charts, dashboards and advanced concepts.
- Slemma Vimeo Channel (vimeo.com/slemma)
    - Video: Slemma in 44 Seconds - A quick overview of the Slemma reporting platform.
    - Video: Slemma Filtering Demo - How to use Slemma advanced filtering on your charts and dashboards.
    - Video: Instant Hubspot Dashboards - If you use Hubspot, check out this great resource for creating great dashboards with that data.