Create a Custom Report

Follow the appropriate steps to create one of the nine custom reports about one or more experiences that are available in the Monetate platform.

> See Custom Reports Overview for information about what data each custom report option contains.

Experience Performance Report or No Control Experience Performance Report

> Because values from Dynamic Testing experiences, Automated Personalization experiences, and Multivariate Test (MVT) experiences are reported differently from other experiences, you cannot include these experiences types in an Experience Performance Report. Names of any Dynamic Testing, Automated Personalization, and MVT experiences do not appear in Available Experiences if you schedule the report to run once or if you schedule the report to run weekly or monthly and then choose to manually select the specific experiences you want included in the report.

Follow these steps to create either an Experience Performance Report or a No Control Experience Performance Report.

1. Click **ANALYTICS** in the top navigation bar and then select **Custom Reports**.

2. Click **CREATE REPORT**.

3. Give the report a name, and then select either **Experience Performance Report** or **No Control Experience Performance Report** from **Report Type**.

4. As necessary, click to toggle between the default **5 DECIMAL PLACES** and **3 DECIMAL PLACES**.

   > The default setting for decimal places is five for all data in the Experience Performance Report and the No Control Experience Performance Report. The default five decimal places increases precision for rate-based metrics.

5. As necessary, adjust the dampening to scale purchases in the report that are above the selected threshold to a specific number of standard deviations (SD) above the mean.

6. Configure the report scheduling.

    a. Select if you want to run the report once, weekly, or monthly.

    b. If you selected **Weekly** in step 6a, then select on which day of the week you want the report generated.

    c. If you selected **Monthly** in step 6a, then select a date on which you want the report generated each month. The latest date in a month that you can select is the 28th.

7. Configure the WHO settings to refine the scope of the report.
    a. Click **WHO** and then click **ADD TARGET**.

    b. Select the target type.

    c. Configure the target and then click **CREATE**.
        - As applicable and necessary, select to include or exclude the target.
        - As applicable and necessary, input or select the target's criteria.

    d. As necessary, repeat steps 7a through 7c to configure additional targets.
8. Refine which metrics you want in the report. Click **WHAT** and then select the metrics you want to include. See Custom Reports Overview to review which metrics you can include in an Experience Performance Report and in a No Control Experience Performance Report.

9. Configure the time frame of the report.
    a. Click **WHEN** and then select a time range option.

    b. If you selected **Custom dates** in the previous step, then input or select from the calendar a start date and an end date, respectively.

10. Configure which experiences you want included in the report.
    a. Click **WHERE**.

    b. If you scheduled the report to run weekly or monthly in step 6a, then select how the experiences included in the report are determined:
        - **Manually** — You select the specific experiences, which will always be included each time the report is generated
        - **Dynamically** — Experiences that meet the criteria WHERE filtering criteria as well as any specific experiences you optionally add.

    c. If you selected **Manually** in the previous step or scheduled the report to run once in step 6a, then select from Available Experiences the specific experiences you want included in the report. Click to select the experience and then click **MOVE TO SELECTED**.

  d. If you selected **Dynamically** in step 10b, then add experience-filtering criteria as necessary. Type an experience name or experience tag into the Available Experiences search field, and then press Enter to add the tag or name to the WHERE settings.

11. Save the report.
    - If you selected **Weekly** or **Monthly** in step 6a, then click **SCHEDULE REPORT**.
    - If you selected **Once** in step 6a, then click **EXECUTE REPORT**.

You can access the report on the Custom Reports list page. See Viewing Reports for more information.

Purchase Audit Report

Follow these steps to create a Purchase Audit Report.

1. Click **ANALYTICS** in the top navigation bar and then select **Custom Reports**.

2. Click **CREATE REPORT**.

3. Give the report a name, and then select **Purchase Audit Report** from **Report Type**.

4. Configure the report scheduling.
   a. Select if you want to run the report once, weekly, or monthly.

   b. If you selected **Weekly** in step 4a, then select on which day of the week you want the report generated.

   c. If you selected **Monthly** in step 4a, then select a date on which you want the report generated each month. The latest date in a month that you can select is the 28th.

5. Refine which metrics you want in the report. Click **WHAT** and then select the metrics you want to include.

6. Configure the time frame of the report.
   a. Click **WHEN** and then select a time range option.

b. If you selected **Custom dates** in the previous step, then input or select from the calendar a start date and an end date, respectively.

7. Configure which experiences you want included in the report.
    a. Click **WHERE**.

    b. If you scheduled the report to run weekly or monthly in step 4a, then select how the experiences included in the report are determined:
        - **Manually** — You select the specific experiences, which will always be included each time the report is generated
        - **Dynamically** — Experiences that meet the criteria WHERE filtering criteria as well as any specific experiences you optionally add.

    c. If you selected **Manually** in the previous step or scheduled the report to run once in step 4a, then select from Available Experiences the specific experiences you want included in the report. Click to select the experience and then click **MOVE TO SELECTED**.

    d. If you selected **Dynamically** in step 7b, then add experience-filtering criteria as necessary. Type an experience name or experience tag into the Available Experiences search field, and then press Enter to add the tag or name to the WHERE settings.

8. Save the report.
    - If you selected **Weekly** or **Monthly** in step 4a, then click **SCHEDULE REPORT**.

    - If you selected **Once** in step 4a, then click **EXECUTE REPORT**.

You can access the report on the Custom Reports list page. See Viewing Reports for more information.

Purchase Detail Report

Follow these steps to create a Purchase Detail Report.

1. Click **ANALYTICS** in the top navigation bar and then select **Custom Reports**.

2. Click **CREATE REPORT**.

3. Give the report a name, and then select **Purchase Detail Report** from **Report Type**.

4. Configure the report scheduling.
    a. Select if you want to run the report once, weekly, or monthly.

    b. If you selected **Weekly** in step 4a, then select on which day of the week you want the report generated.

    c. If you selected **Monthly** in step 4a, then select a date on which you want the report generated each month. The latest date in a month that you can select is the 28th.

5. Refine which metrics you want in the report. Click **WHAT** and then select the metrics you want to include.

6. Configure the time frame of the report.
    a. Click **WHEN** and then select a time range option.

    b. If you selected **Custom dates** in the previous step, then input or select from the calendar a start date and an end date, respectively.

7. Configure which experiences you want included in the report.
    a. Click **WHERE**.

    b. If you scheduled the report to run weekly or monthly in step 4a, then select how the experiences included in the report are determined:
        - **Manually** — You select the specific experiences, which will always be included each time the report is generated
        - **Dynamically** — Experiences that meet the criteria WHERE filtering criteria as well as any specific experiences you optionally add.

    c. If you selected **Manually** in the previous step or scheduled the report to run once in step 4a, then select from Available Experiences the specific experiences you want included in the report. Click to select the experience and then click **MOVE TO SELECTED**.

    d. If you selected **Dynamically** in step 7b, then add experience-filtering criteria as necessary. Type an experience name or experience tag into the Available Experiences search field, and then press Enter to add the tag or name to the WHERE settings.

8. Save the report.
    - If you selected **Weekly** or **Monthly** in step 4a, then click **SCHEDULE REPORT**.

    - If you selected **Once** in step 4a, then click **EXECUTE REPORT**.

You can access the report on the Custom Reports list page. See Viewing Reports for more information.

Search Term Report

Follow these steps to create a Search Term Report.

1. Click **ANALYTICS** in the top navigation bar and then select **Custom Reports**.

2. Click **CREATE REPORT**.

3. Give the report a name, and then select **Search Term Report** from **Report Type**.

4. Configure the report scheduling.
    a. Select if you want to run the report once, weekly, or monthly.

    b. If you selected **Weekly** in step 4a, then select on which day of the week you want the report generated.

    c. If you selected **Monthly** in step 4a, then select a date on which you want the report generated each month. The latest date in a month that you can select is the 28th.

5. Configure the time frame of the report.
    a. Click **WHEN** and then select a time range option.

    b. If you selected **Custom dates** in the previous step, then input or select from the calendar a start date and an end date, respectively.

6. Save the report.
    - If you selected **Weekly** or **Monthly** in step 4a, then click **SCHEDULE REPORT**.

    - If you selected **Once** in step 4a, then click **EXECUTE REPORT**.

You can access the report on the Custom Reports list page. See Viewing Reports for more information.

Referrer Report

Follow these steps to create a Referrer Report.

1. Click **ANALYTICS** in the top navigation bar and then select **Custom Reports**.
2. Click **CREATE REPORT**.
3. Give the report a name, and then select **Referrer Report** from **Report Type**.
4. Configure the report scheduling.
   a. Select if you want to run the report once, weekly, or monthly.
   b. If you selected **Weekly** in step 4a, then select on which day of the week you want the report generated.
   c. If you selected **Monthly** in step 4a, then select a date on which you want the report generated each month. The latest date in a month that you can select is the 28th.
5. Configure the time frame of the report.
   a. Click **WHEN** and then select a time range option.
   b. If you selected **Custom dates** in the previous step, then input or select from the calendar a start date and an end date, respectively.
6. Save the report.
   - If you selected **Weekly** or **Monthly** in step 4a, then click **SCHEDULE REPORT**.
   - If you selected **Once** in step 4a, then click **EXECUTE REPORT**.

You can access the report on the Custom Reports list page. See Viewing Reports for more information.

Account Dashboard Report

Follow these steps to create an Account Dashboard Report.

1. Click **ANALYTICS** in the top navigation bar and then select **Custom Reports**.

2. Click **CREATE REPORT**.

3. Give the report a name, and then select **Account Dashboard Report** from **Report Type**.

4. Configure the report scheduling.
   a. Select if you want to run the report once, weekly, or monthly.

   b. If you selected **Weekly** in step 4a, then select on which day of the week you want the report generated.

   c. If you selected **Monthly** in step 4a, then select a date on which you want the report generated each month. The latest date in a month that you can select is the 28th.

5. Configure the time frame of the report.
   a. Click **WHEN** and then select a time range option.

   b. If you selected **Custom dates** in the previous step, then input or select from the calendar a start date and an end date, respectively.

6. Save the report.
   - If you selected **Weekly** or **Monthly** in step 4a, then click **SCHEDULE REPORT**.

   - If you selected **Once** in step 4a, then click **EXECUTE REPORT**.

You can access the report on the Custom Reports list page. See Viewing Reports for more information.

Revenue per Session Detail Report

Follow these steps to create a Revenue per Session Detail Report.

1. Click **ANALYTICS** in the top navigation bar and then select **Custom Reports**.

2. Click **CREATE REPORT**.

3. Give the report a name, and then select **Revenue per Session Detail Report** from **Report Type**.

4. Configure the report scheduling.
    a. Select if you want to run the report once, weekly, or monthly.

    b. If you selected **Weekly** in step 4a, then select on which day of the week you want the report generated.

    c. If you selected **Monthly** in step 4a, then select a date on which you want the report generated each month. The latest date in a month that you can select is the 28th.

5. Configure the time frame of the report.
    a. Click **WHEN** and then select a time range option.

    b. If you selected **Custom dates** in the previous step, then input or select from the calendar a start date and an end date, respectively.

6. Configure which experiences you want included in the report.
    a. Click **WHERE**.

    b. If you scheduled the report to run weekly or monthly in step 4a, then select how the experiences included in the report are determined:
        - **Manually** — You select the specific experiences, which will always be included each time the report is generated
        - **Dynamically** — Experiences that meet the criteria WHERE filtering criteria as well as any specific experiences you optionally add.

    c. If you selected **Manually** in the previous step or scheduled the report to run once in step 4a, then select from Available Experiences the specific experiences you want included in the report. Click to select the experience and then click **MOVE TO SELECTED**.

    d. If you selected **Dynamically** in step 6b, then add experience-filtering criteria as necessary. Type an experience name or experience tag into the Available Experiences search field, and then press Enter to add the tag or name to the WHERE settings.

7. Save the report.
    - If you selected **Weekly** or **Monthly** in step 4a, then click **SCHEDULE REPORT**.

    - If you selected **Once** in step 4a, then click **EXECUTE REPORT**.

You can access the report on the Custom Reports list page. See Viewing Reports for more information.

Action Performance Report

Follow these steps to create an Action Performance Report.

1. Click **ANALYTICS** in the top navigation bar and then select **Custom Reports**.
2. Click **CREATE REPORT**.
3. Give the report a name, and then select **Action Performance Report** from **Report Type**.
4. Configure the report scheduling.
    a. Select if you want to run the report once, weekly, or monthly.
    b. If you selected **Weekly** in step 4a, then select on which day of the week you want the report generated.
    c. If you selected **Monthly** in step 4a, then select a date on which you want the report generated each month. The latest date in a month that you can select is the 28th.
5. Configure the time frame of the report.
    a. Click **WHEN** and then select a time range option.
    b. If you selected **Custom dates** in the previous step, then input or select from the calendar a start date and an end date, respectively.
6. Configure which experiences you want included in the report.
    a. Click **WHERE**.
    b. If you scheduled the report to run weekly or monthly in step 4a, then select how the experiences included in the report are determined:
        - **Manually** — You select the specific experiences, which will always be included each time the report is generated
        - **Dynamically** — Experiences that meet the criteria WHERE filtering criteria as well as any specific experiences you optionally add.

c. If you selected **Manually** in the previous step or scheduled the report to run once in step 4a, then select from Available Experiences the specific experiences you want included in the report. Click to select the experience and then click **MOVE TO SELECTED**.

d. If you selected **Dynamically** in step 6b, then add experience-filtering criteria as necessary. Type an experience name or experience tag into the Available Experiences search field, and then press Enter to add the tag or name to the WHERE settings.

7. Save the report.
   - If you selected **Weekly** or **Monthly** in step 4a, then click **SCHEDULE REPORT**.
   - If you selected **Once** in step 4a, then click **EXECUTE REPORT**.

You can access the report on the Custom Reports list page. See Viewing Reports for more information.

WHO Targets

The following targets are available when you create an Experience Performance Report or a No Control Experience Performance Report.

Landing Targets

Target	Description
Referrer	Include or exclude visitors who arrive on your site from another site **Note**: This target only works for `https://` to `https://` navigation or `http://` to `http://` navigation since, as a security measure, you cannot go from a secured site to an unsecured site.
New Visitors	Include or exclude visitors who arrived on your site for the first time or for the first time since clearing their cache and removing any cookies set by Monetate
Landing URL	Include or exclude visitors who arrive on a page containing a certain URL string **Note**: This target matches any part of the landing URL, including query parameters.

Location Targets

Target	Description
Country	Include or exclude visitors from a certain country or from one of multiple countries
Time Zone	Include or exclude visitors based on their time zone
City	Include or exclude visitors from a certain city or from one of multiple cities

Target	Description
Zip/Postal Code	Include or exclude visitors based on their US ZIP code or international postal code
Media Market	Include or exclude visitors based on their media market **Note**: This target only uses US media markets.
US State	Include or exclude visitors based on their US state or one of the multiple states
IP Address	Include or exclude visitors with a certain IP address or one of the multiple IP addresses **Note**: The IP address must be in the IPv4 format (`x.x.x.x`).

Behavior Targets

Target	Description
Has Purchased Product	Include or exclude visitors who've purchased a product from a list of product IDs that you input within the report's timeframe
Has Purchased (Any Product)	Include or exclude visitors who've purchased any product within the report's timeframe
Has Viewed Product	Include or exclude visitors who've viewed a product from a list of product IDs that you input within the report's timeframe

Technographics Targets

Target	Description
Device	Include or exclude visitors based on the device they're using **Note**: Device type is defined by the `User-Agent` string sent in the browser header.
Screen Width	Include or exclude visitors based on their device's screen width
Screen Resolution	Include or exclude visitors based on the resolution of their device's screen
Browser	Include or exclude visitors based on the browser they're using
Operating System	Include or exclude visitors based on the operating system they're using
Screen Height	Include or exclude visitors based on their device's screen height