



SONAR USER GUIDE

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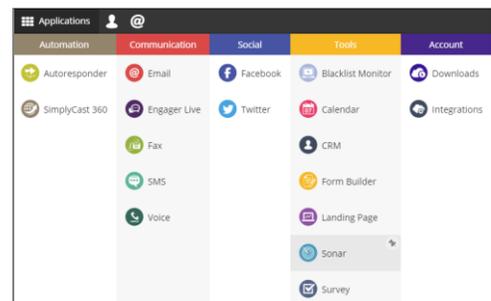
Overview

The SimplyCast platform includes the anonymous web tracking software, Sonar, which enables you to keep track of visitors to your online sources from your website, and your email projects. Sonar gathers information from these visitors and stores it in the SimplyCast Contact Relationship Manager for future use.

The benefits of anonymous web tracking are many. The majority of people who interact with your website may not end up signing up so, without web tracking, you lose all that potential data you could be using to improve your connections. Sonar is able to collect information about a person the moment he or she arrives on your site, whether they sign up to receive communications from you or not.

Sonar Dashboard

The Sonar Dashboard can be accessed by navigating to the Applications dropdown menu at the top of your screen and selecting the Sonar option. The dashboard is where you can monitor all your various tracking links and the results they gathered. Refer to the *Create a New Tracker* section for more information on these options.



From the Sonar Dashboard, you are able to:

View the Number of Trackers Created

The first section you will see on the Sonar Dashboard is the Trackers Created section. In this box you will be able to see how many tracker links and pixels you have created within the current time period. There will be three numbers visible: one large number and two smaller numbers on top of each other to the right of the larger number.

The large number represents the total number of trackers created within the current time period. The first smaller number located on top of the second displays the total number of trackers created within the previous time period and the second smaller number represents the percentage by which the large number has changed compared to the previous period.



You will also see a colored arrow in the Trackers Created box. The arrow will appear green and pointed upwards if the number of trackers created in the current period has risen, or the arrow will appear red and pointed downward if the

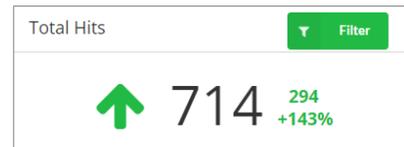


number of trackers has decreased. The information in this box can be filtered by a chosen date range, causing the Filter button to appear green. Refer to the *Filter a Date Range* section.

View the Number of Total Hits

To the right of the Trackers Created section you will see the Total Hits section where it displays the number of interactions your trackers received over the current time period. Three numbers will be visible: a large number along with two smaller numbers to its right.

The large number represents the total number of hits tracked within the current time period. Hits can be link clicks, website visits, etc. The first smaller number located on top of the second displays the total number of hits received within the previous time period and the second smaller number represents the percentage by which the large number has changed compared to the previous period.



You will also see a colored arrow in the Total Hits box. The arrow will appear green and pointed upwards if the number of total hits in this period has risen or the arrow will appear red and pointed downward if the number has decreased. The information in this box can be filtered by a chosen date range, causing the Filter button to appear green. Refer to the *Filter a Date Range* section.

View the Number of Unique Hits

The section that appears at the top right corner of the Sonar Dashboard is where you can view the number of unique hits received by your trackers. Unique hits refer to the number of individual users who have interacted with these trackers, not counting multiple clicks on trackers by the same person.

As with the other two sections at the top of the Sonar Dashboard, you can see three numbers in the Unique Hits box: one large number and two smaller. Here, the larger number represents the total number of unique hits received within the current time period. The first small number on top of the second displays the number of unique hits that occurred in the previous time period and the bottom number represents the percentage by which the large number has changed compared to the previous period.

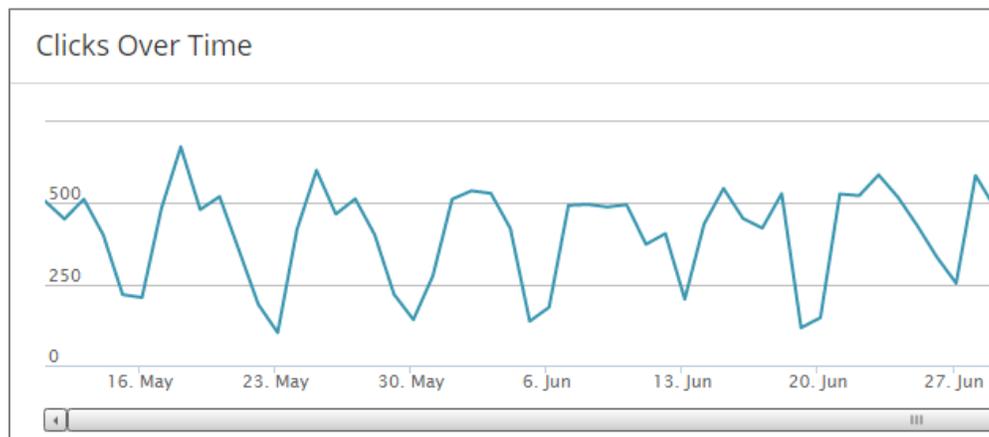
The colored arrow in the Unique Hits box represents the current trend for unique hits. The arrow will appear green and pointed upwards if the number of unique hits in this period has risen or the arrow will appear red and pointed downward if it has decreased.



The information in this box can be filtered by a chosen date range, causing the Filter button to appear green. Refer to the *Filter a Date Range* section.

Monitor Clicks Over Time

The middle section of the Sonar Dashboard displays a line graph with a representation of the number of clicks your trackers have received per day over a specific time period.



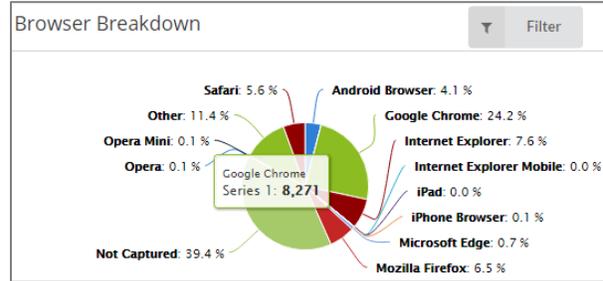
By hovering your mouse over a specific point in the graph, a box will appear indicating the particular date as well as the total number of hits received that day.

Use the scroll bar found at the bottom of this section to view the extremities of the date range selected (refer to number 7 in this list). The information in this section can be filtered by a chosen date range, causing the Filter button to appear green. Refer to the *Filter a Date Range* section.

Analyze the Browser Breakdown

There are two boxes in the bottom section of the Sonar Dashboard. The box on the left is the Browser Breakdown. Here, you are able to view a pie chart to help analyze and compare the browsers used to interact with your trackers. Next to each section in the pie chart you can see the name of the browser used as well as its use percentage compared to other browsers.

The information in this box can be filtered by a chosen date range, causing the Filter button to appear green. Refer to the *Filter a Date Range* section.



View Your Top Trackers

To the right of the Browser Breakdown pie chart in the Sonar Dashboard you will find the Top Links section. In this section, you will see a list of the five most interacted-with trackers you created.

Each listing will include the following information:

- **Description:** Brief title of the tracker detailing what is being tracked
- **Clicks:** Total number of clicks the tracker received
- **Unique Clicks:** Total number of unique clicks the tracker received

Top Links		
Description	Clicks	Unique Clicks
Powered By Logo	444937	50016
[Marketing] WWW website	426843	180527
Application Signup	33146	32993

Clicking on any of these trackers will direct you to the Overview page for that specific tracker.

Filter a Date Range

For most of the aforementioned sections you are able to customize the viewable date range. The only section where filtering is not available is the Top Links Section as these links represent the top trackers of all time.

Unique Hits Filter

Date Range: 2017-12-29 to 2018-01-05

Buttons: Clear, or, Apply

To filter your date ranges:

- Locate the gray filter button that appears at the top right-hand corner of the section you would like to filter.
- Click the filter button to cause a dropdown menu to appear with a Date Range field.
- Click either of the date fields to produce a calendar where you can select the dates between which you would like to filter the tracking information.
- Click the blue Apply button to implement the filter and close the dropdown menu. Alternatively, click Clear to close the dropdown without creating a filter.



- When a filter is active the formerly gray Filter button will appear green. To remove a filter simply click the green Filter button and select the Clear button.

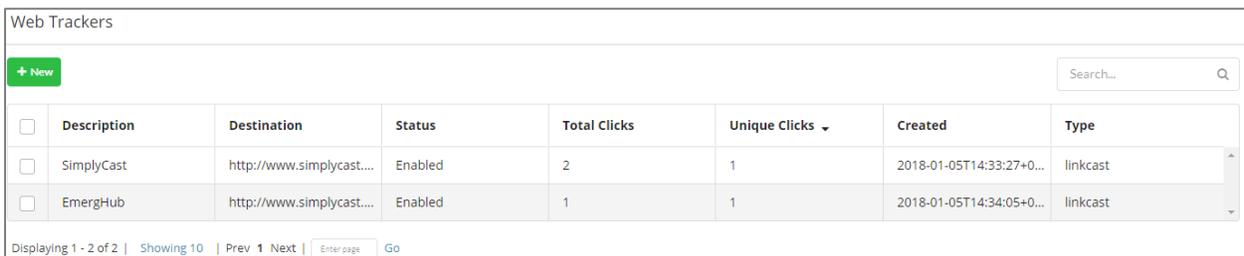
Web Trackers

The Web Trackers tab is the second tab located in the menu on the left-hand side of the Sonar Dashboard. This page allows you to view and modify any of the trackers you have created as well as create new ones. Trackers are either links or pixels that can be embedded into emails, web forms, website pages, etc. in order to gather information regarding the activity and interactions of visitors.

[Note: These visitors do not have to be known to you. The CRM will create an anonymous contact profile for each new visitor to interact with your tracking links or pixels. If the anonymous profile ends up signing up with you or making themselves known to you in any other way, that new contact information will be linked with the already-created contact profile in the CRM.]

On the Web Trackers page you are able to:

View the List of Trackers



<input type="checkbox"/>	Description	Destination	Status	Total Clicks	Unique Clicks ↓	Created	Type
<input type="checkbox"/>	SimplyCast	http://www.simplycast...	Enabled	2	1	2018-01-05T14:33:27+0...	linkcast
<input type="checkbox"/>	EmergHub	http://www.simplycast...	Enabled	1	1	2018-01-05T14:34:05+0...	linkcast

If you have created any tracking links or pixels, they will show up in the table in the Web Trackers tab. **The trackers are broken down into seven columns of information:**

- **Description:** The brief title of the tracker, detailing what it is tracking
- **Destination:** The URL of the page where the tracker leads those who click it
- **Status:** Whether the tracker is enabled or disabled
- **Total Clicks:** The total number of clicks the tracker has received
- **Unique Clicks:** The number of unique clicks the tracker has received
- **Created:** The date and time the tracker was created
- **Type:** Whether the tracker is a link, pixel, or custom tracker (refer to the *Create a New Tracker* section for definitions)



Search Existing Trackers

You are able to search for a particular tracker you have created in the list of trackers.

To do so:

- Navigate to the top right-hand corner of your screen and locate the search bar.
- Start typing in the text you would like the system to search for.
- The trackers will automatically search.



Create a New Tracker

To create a new tracker:



- Locate the green New button found at the top of your screen in the Web Trackers tab. Clicking this button will direct you to the page where you can begin the configuration of your new tracker.
- When you've arrived at the New Tracker page, the first thing you must do is to create a description for your new tracker in the Tracker Description field. This is essentially a name for your tracker.
- To the right of the Tracker Description field you will see the Tracker Type field. When you click on this field you will open a dropdown menu with three options for a tracker type.
 - > **Custom Tracking Link:** This tracking link serves the same purpose as a tracking link (see below), however the ending of the shortened hyperlink can be customized instead of auto-generated, allowing you to choose how your link is presented to the public,
 - > **Tracking Link:** The tracking link is a method of tracking visitors to your site who are coming in through external sources. The link can also tell you where they came from and where they landed. This provides a little less information compared to the pixel, but can be put on pages outside of your own website as well as shared in emails, forms, etc. unlike the tracking pixel,
 - > **Tracking Pixel:** The tracking pixel is embedded on your website and tracks advanced details about what is done on the page it lives on. It loads with the page and only requires that someone reaches that page. This tracks internally, so only on your own web pages,

The rest of the tracker creation process differs depending on the tracker type chosen from the dropdown.

Custom Tracking Link

If you choose the Custom Tracking Link option in the tracking type field, **here are the next steps in creating your new tracker:**

- After the Tracker Type field, the next field is the Link Destination URL, located under the Tracker Description. In this field, you must enter the URL of the website page the link clicker will be directed to once they click on your custom tracking link.
- Next to the Link Destination URL field is the Tracking Link field. Once you save your new tracker this field will populate automatically with a shortened URL you can take and use instead of the longer Link Destination URL.
- Below the Link Destination URL field is the Custom URL field. If you want to modify the automatically-generated tracking link provided in the Tracking Link field, you are able to customize the end portion of the link in this field using numbers, letters, and underscores.

[**Note:** A Custom URL must be unique. If the created URL is already in use, you will be told you are not able to use that URL.]

Click the blue Save button to save and view the tracking link. Click the blue Save & Return button to save the link and return to the Web Trackers page. Or, click the red Return button to return to the Web Trackers page without saving the link.

Tracker Description SimplyCast Login	Tracker Type Custom Tracking Link
Link Destination URL http://app.simplycast.com	Tracking Link http://1nk.io/c/_app
Custom URL _app	

Tracking Link

Here are the next steps in creating your new tracker after choosing the Tracking Link option:

- After the Tracker Type field, the next field is the Link Destination URL located under the Tracker Description. Here, you must enter the URL of the website page the link clicker will be directed to once they click your tracking link.
- Beside the Link Destination URL field is the Tracking Link field. After saving your new tracker, this field will populate automatically with a shortened URL you can use instead of using the longer Link Destination URL.

Click the blue Save button to save and view the tracking link. Click the blue Save & Return button to save the link and return to the Web Trackers page. Or, click the red Return button to return to the Web Trackers page without saving the link.

Tracker Description SimplyCast	Tracker Type Tracking Link
Link Destination URL http://www.simplycast.com	Tracking Link http://1nk.io/tV9e

Tracking Pixel

Here is the next step in creating your new tracker after choosing the Tracking Pixel option:

- After the Tracker Type field, the next field in the Tracking Code located under the Tracker Description. This field will populate automatically with code that you can embed on your website to track information about visitors to your site.

Click the blue Save button to save and view the tracking link. Click the blue Save & Return button to save the link and return to the Web Trackers page. Or, click the red Return button to return to the Web Trackers page without saving the link.

Tracker Description SimplyCast
Tracking Code

Add Additional Tracking Information

Once you have determined your tracker type and have filled in the rest of the fields in the first section of the new tracker configuration according to your chosen tracker type, there is a second section on the page that is common to all tracker types. In this section, you can create a tracking rule, allowing you to ensure a specific action is performed automatically every time a visitor clicks the link or visits the page. This action is made in regard to the visitor's unique contact profile in the CRM, which is created automatically once a unique IP address visits the page or clicks the link and stores all the information collected about that visitor.

Click the blue "+" sign on the left side of your screen to begin creating your additional tracking data.



[**Note:** The Tracking Information section is used to modify the link clickers' profiles depending on how they interact with the tracking link or pixel. For example, if a contact were to visit a page on a specific item, you could mark them as being interested in that item by adding a tag to their profile so you can use that information in the future.]

To create a tracking rule there are four field columns to fill out:

	Data Source	Destination Field	Operation	Parameter
	Fixed Value	Tags	Insert Value	Signedup

- **Data Source:** This field is used to determine what is being modified in the tracking item. It tells the tracker what source to pull contact data from to alter. **There are four different data types:**
 - > **Fixed Value:** The value created when the tracking data is activated, whether it is a link or a pixel. This is used in adding or removing anything from the Destination Field
 - > **Tracker URL:** The link that redirects users to your webpage when clicked. By clicking on the link, the Tracker URL is able to gather information on users based on IP addresses. The tracker URL then transforms that data into known and unknown profiles
 - > **Referer URL:** Comes from the webpage that led a user to your webpage. A Referer URL takes information about the user from the page the link was clicked on. This option is available with the Tracking Link or Custom Tracking Link data types
 - > **Page URL:** The URL from the webpage the tracking pixel is embedded on. This option is only available with the Tracking Pixel data type

- **Destination Field:** This field is used to dictate where in the contact profile information is being changed. The contact can either be known or unknown. This allows you to automatically update or add to the profile every time someone activates a link or pixel

There are 12 different Destination Fields:

- > **Tags:** A word or phrase assigned to a contact or group of contacts to describe or compartmentalize them, allowing you to better target the communications you send their way. In this case, selecting Tag means when the tracker is interacted with by either a known or unknown contact, it will add a pre-specified tag to the contact profile. Refer to the CRM User Guide for more information on Tags
 - > **Score:** A digital measurement of the total engagement of the user numerically
 - > **Ad Source:** The parameters surrounding the location of your ad when the visitor used it to access your page
 - > **Ad Medium:** The parameters surrounding the type of advertisement the visitor used to access your page
 - > **Ad Campaign:** The parameters surrounding the specific campaign you used to draw the visitor to your page
 - > **Ad Content:** The parameters surrounding the specific type of content within your campaign used to draw the visitor to your page
 - > **Search Term:** The search terms used by the site visitor that lead them to clicking your tracker
 - > **Acquisition Cost:** The estimation of how much was spent on advertising to bring in a visitor
 - > **Potential Value:** Another estimated, manually-inputted Destination Field that is a rough estimate of what a visitor might be worth based on score, past activity, and pages visited
 - > **Purchase Cost:** How much someone has cumulatively spent based on clicking a link or, ideally, loading a receipt page
 - > **Site Category:** The type of site the visitor came from to get to your page
 - > **Alternate Contact:** Used by the Recall module to contact a secondary person if the primary contact does not answer the recall within a certain amount of time (Refer to the Recall User Guide for more information)
- **Operation:** This field is used to determine how the tracked data is to be modified. Depending on the Destination Field you choose **there are six various operations:**
 - > **Insert Value:** Inserts the designated parameter into the Destination Field
 - > **Remove Value:** Removes the designated parameter from the Destination Field
 - > **Add Value:** Cumulatively adds the designated parameter to the Destination Field



- > **Subtract Value:** Cumulatively subtracts the designated parameter from the Destination Field
- > **Set to Value:** Sets the Destination Field to the parameter specified
- > **Clear All:** Removes all parameters currently in the Destination Field
- **Parameter:** This field refers to the value the tracker is modified by. Type in the value in the field provided

Once you have finished creating your additional tracking data, click the blue Save & Return button at the bottom of your screen to save the data and return to the main Web Trackers page. If you would like to add another piece of additional tracking data to your new tracker, click the blue “+” sign button in the Additional Tracking Data section to choose another Data Type. Alternatively, click the red trash can button to the left of any of your added tracking rules to remove that data from the tracker.



Click the blue Save & Return button to save the tracker and return to the main Web Trackers page. To return to the Web Trackers page without creating a new tracker, click the red Return button found at the bottom of your page.



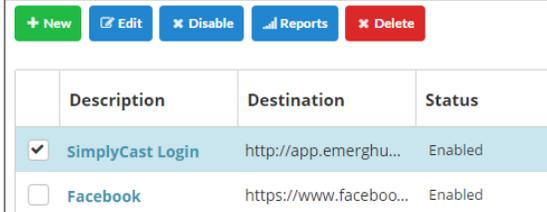
Edit a Tracker



Back on the main Web Trackers page, you are able to edit an existing tracker.

To do this:

- Locate the checkbox found at the left-hand side of the tracker you would like to edit.
- When checked off, four new buttons will appear next to the green New button. The blue Edit button will be located directly to the right of the New button. Click this button to enter the New Tracker page where you can modify the settings of your tracker.
- Click the blue Save & Return button at the bottom of your screen to save your changes and return to the main Web Trackers page. Click the blue Save button to save your changes and remain on the page or click the red Return button to go back to the Web Trackers page without making any changes.



	Description	Destination	Status
<input checked="" type="checkbox"/>	SimplyCast Login	http://app.emerghu...	Enabled
<input type="checkbox"/>	Facebook	https://www.faceboo...	Enabled

Disable a Tracker



You are also able to disable a tracker from the main Web Trackers page. Disabling a tracker means the tracker will not collect any more information about visitors who click on the link or pixel.

To do this:

- Locate the checkbox found at the left-hand side of the tracker name you would like to disable.
- Check off this box next to your desired tracker and the blue Disable button will be located to the right of the blue Edit button above the list of all your trackers. Click this button to disable the tracker.
- If you would like to re-enable this tracker, follow these steps again and the blue button will say Enable instead of Disable. Clicking the button will tell the tracker to begin collecting visitor information again.

View Tracker Report



To access the report for a tracker from the Web Trackers page:

- Locate the checkbox found at the left-hand side of the tracker name for which you would like to view the report.
- The blue Reports button will appear at the top of the list of trackers. Click this button to be directed to the individual report for this tracker (refer to the *Reports* section for more information).

Delete a Tracker



To delete a tracker from the Web Trackers page:

- Locate the checkbox found at the left-hand side of the tracker you would like to delete.
- The red Delete button will appear at the top of the list of trackers. Click this button and a pop-up will appear asking you to confirm the deletion of the tracker.
- Click the Delete button to confirm or the Cancel button to close the window without deleting the tracker.

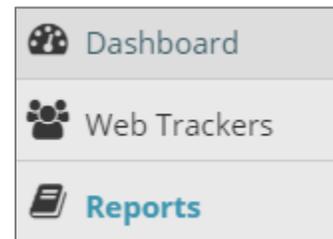
[**Note:** Delete multiple trackers at once by checking off the left-hand boxes next to the trackers you want to delete and clicking the red Delete button at the top of the list of trackers.]

Sonar Reports

To view a report for any of your Sonar trackers, you must navigate to the Sonar Reports interface:

- Go to the Sonar Web Trackers page.
- Click the checkbox to the left of the tracker you wish to view the report of.
- Four buttons will appear at the top of your screen next to the green New button. Click on the blue Reports button that is located to the left of the red Delete button.
- You will be directed to the Sonar report for that tracker.

[**Note:** Alternatively, you can select the Reports option found in the left-hand menu to be directed to the main Sonar Reports dashboard where you can choose a report to view.]



From here, you can:

View the List of Reports

In the main Reporting interface, the first thing you will see is a list of all the reports corresponding to each tracker you have created.

Sonar Reports						
# View Report Filter <input type="text" value="Search..."/>						
Description	Destination	Status	Total Clicks	Unique Clicks	Created	Type
SimplyCast	http://www.simplycast.com	Enabled	2	1	2018/01/05 10:33 AM	link
EmergHub	http://www.simplycast.com/emerghub	Enabled	1	1	2018/01/05 10:34 AM	link

This list is divided into seven columns:

- **Description:** The brief title of the tracker detailing what it is tracking
- **Destination:** The URL of the page where the tracker leads those who click on it

[**Note:** If the report is for a tracking pixel, the Destination field will be labeled N/A.]

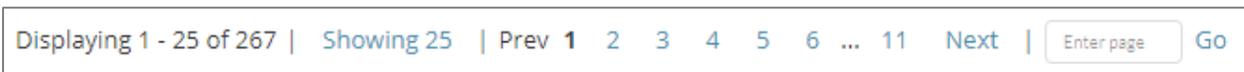
- **Status:** Whether the tracker is enabled or disabled
- **Total Clicks:** The total number of clicks the tracker received
- **Unique Clicks:** The number of unique clicks the tracker received



- **Created:** The date and time the tracker was created
- **Type:** Whether the tracker is a link, custom link, or pixel

Navigate Multiple Pages of Reports

If you have created enough trackers, they will be displayed on multiple pages in the Reports Dashboard. To view a tracker that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find page numbers. Proceed to another page of trackers by clicking either the page number you would like to visit or the Next button, which will take you to the next page of trackers. You can also choose how many trackers to display at a time by clicking on the “Showing...” link located to the right of the number of displayed trackers.



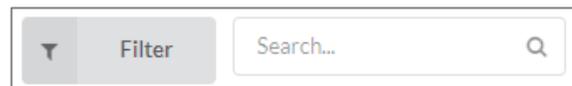
Search Reports



If you are trying to find a particular tracker report, use the search bar located at the top right of the screen above the list of the reports in the main Sonar Reporting interface. As you type in the name of the report you are searching for, results will automatically search.

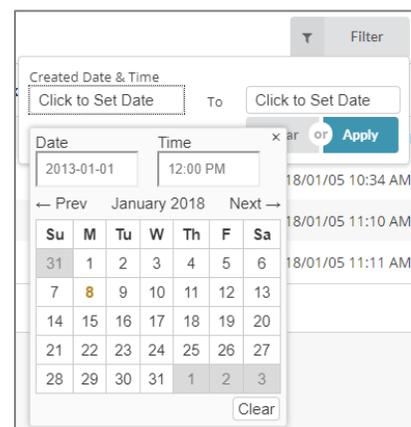
Filter List of Reports

You have the ability to filter your Sonar reports to show tracker reports on a particular date, at a particular time, or within a certain window of time.



To filter your trackers:

- Find the gray Filter button located at the top right-hand side of your screen in the main Sonar Reporting page, directly above the list of trackers, beside the search bar.
- Click the Filter button and a dropdown menu will appear where you will see two boxes that say Click to Set Date.
- Click either box and another dropdown menu will show up with two fields labeled Date and Time in



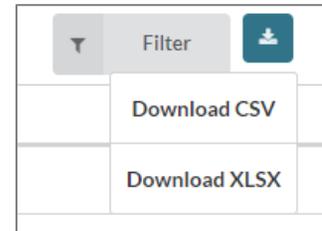
which you can manually insert the date and time you would like to filter tracker reports from.

- Below these fields there are calendars you can also use to choose the date you would like to filter reports from.
- Click Apply to implement the filter and turn the Filter button green. Click Clear if you do not wish to filter your reports, or to clear an already-applied filter, which will close the dropdown menu.

Download the Report

To download a Sonar report to your device:

- Locate the blue download button next to the Filter button at the top left of the screen.
- Clicking this button will produce a dropdown menu where you can choose to download the report as a CSV or XLSX file. Make your selection.
- You will be directed to the Downloads section of the SimplyCast application. Locate the report in the table and click the blue Download Report button to complete the download to your device.



Downloads			
Download Report			
Name	Status	File Type	Created Date
SimplyCast	complete	csv	2018/01/08 9:47 AM

Displaying 1 - 1 of 1 | Showing 25 | Prev 1 Next | Go

View the Report Details

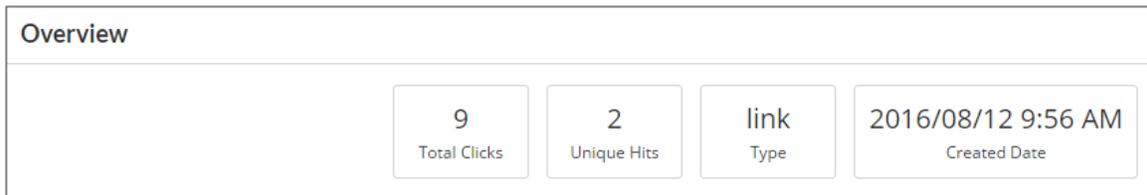
Every Sonar report has at least two tabs: Overview and Activity. These tabs are located at the top of the report and the tab currently open will be underlined in blue.



Overview Tab

The first tab at the top of your Sonar report is the Overview tab. In this tab the first section you will see is a Report Overview where there are four boxes with a high-level information for the report.

- **Total Clicks:** The number of total clicks the tracker received by new and repeat users
- **Unique Hits:** The number of clicks by unique users the tracker received
- **Type:** The tracker type; whether it is a tracking link, custom tracking link, or tracking pixel
- **Created Date:** The date and time the tracker was created



Tracker Information

The second section in the Overview tab is where you can view information regarding your specific tracker.

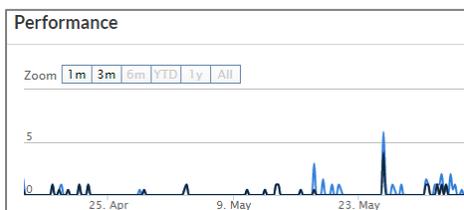
There are two pieces of information in this section:

- **Destination:** This displays the link of the page visitors are directed to upon clicking on the tracking link

[**Note:** The report for a tracking pixel will not have this field.]

- **Link:** This displays the shortened link created for the tracking link or pixel

Performance



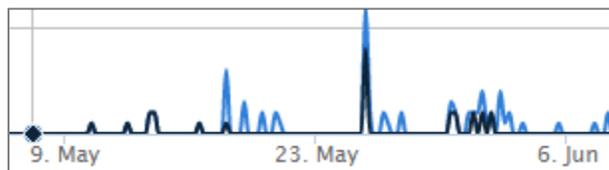
The Performance section is the third section in the Overview tab. Here will see a line graph with a representation of the

number of clicks and unique hits your tracker received per day since the tracker was created. Hovering your mouse over a specific point in the graph will produce a box indicating the



particular date as well as the total number of clicks and unique hits received that day. The blue line on the graph indicates the number of hits while the black line represents the number of unique hits.

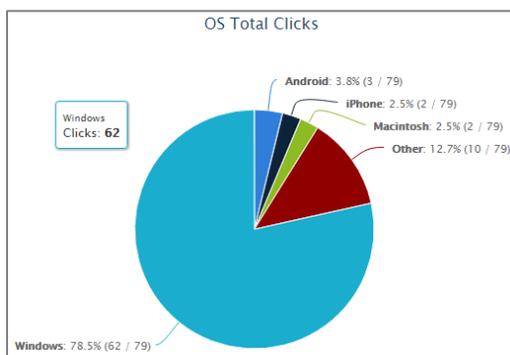
Use the scroll bar found at the bottom of this section to view more of the timeline. Zoom into a specific section of the graph (if the tracker has been active long enough) by locating the Zoom function underneath the Performance header on the left side of the page and clicking on the amount of time you would like to view on the graph. You can also choose a date range to view by selecting your desired dates in the fields located directly across from the Zoom function on the right-hand side of your screen.



Activity Tab

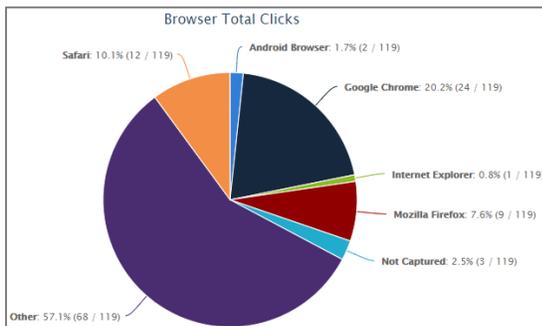
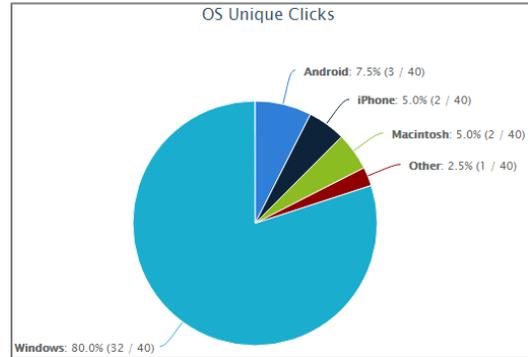
The second tab in the report is the Activity tab. Here is where you will be presented with two sections of information referring to the activity of the visitors who clicked on this particular tracking link or visited your site with the pixel.

The first of these sections is a selection of four pie charts, each detailing the results of a certain statistic.



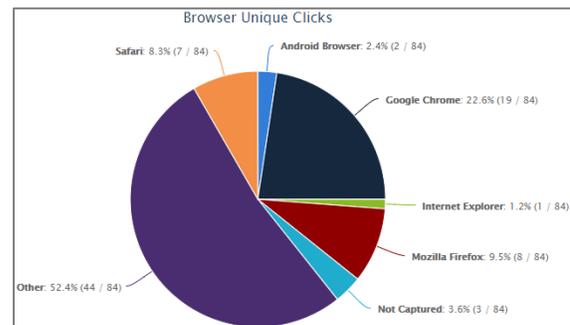
OS Total Clicks: The top left pie chart on your screen represents the different operating systems visitors used to interact with your tracking link/pixel. Hover over each section of the chart to make a box appear with the exact number of clicks that were made using each operating system.

OS Unique Clicks: The top right pie chart represents the different operating systems visitors used to interact with your tracking link/pixel. Hover over each section of the chart to make a box appear with the exact number of unique visitors who clicked on your tracker from each operating system.



Browser Total Clicks: The bottom left pie chart represents different web browsers used to interact with your tracking link/pixel. Hover over each section of the chart to make a box appear with the exact number of clicks that were made using each browser.

Browser Unique Clicks: The bottom right pie chart represents the different web browsers visitors used to interact with your tracking link/pixel. Hover over each section of the chart to make a box appear with the exact number of unique visitors who clicked on your tracker from each browser.



The second section of the Activity tab is a list of all the visitors who clicked on the tracking link or interacted with a page containing a tracking pixel. **The list is divided into six columns of information:**

- **Name:** The name of the visitor who clicked on the tracker if they are known. If the visitor is unknown the field will say Anonymous
- **Time:** The date and time the visitor clicked the tracker
- **Unique:** Whether the visitor is a new or repeat visitor
- **IP:** The IP address of the visitor
- **OS:** The operating system used by the visitor who clicked the tracker
- **Browser:** The web browser used by the visitor who clicked the tracker



Name	Time	Unique	IP	OS	Browser
Anonymous	2017/12/15 5:48 AM	No	██████████	Macintosh	Safari
Anonymous	2017/12/13 9:27 AM	Yes	██████████	Macintosh	Google Chrome
Anonymous	2017/12/12 9:09 PM	Yes	██████████	Macintosh	Google Chrome

Additional Tabs

Depending on whether you chose to add additional tracking rules to visitors who clicked on your tracker (see the *Add Additional Tracking Information* section), you may see other tabs in your Sonar report next to the Overview and Activity tabs. If you only added one additional tracking rule, the additional tab will be labeled according to the Destination Field chosen. If multiple additional rules have been applied, the additional tab will be labeled as Lead Metadata, producing a dropdown menu when selected with the additional rules' Destination fields.

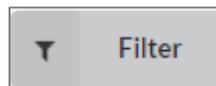
Lead Metadata ▾
Score
Acquisition Cost
Site Category
Tags

These additional tabs will provide you with a list of all of the visitors and the specific information associated with this tracking link/pixel their contact profiles received, along with any other information the profiles have received through interactions with other tracking links or pixels.

Tags	
Name	Tags
Anonymous	Clicked EH link
Anonymous	Clicked EH link, Clicked on FB link

This information can be filtered by the metadata's Value field (refer to the *Add Additional Tracking Information* section for more information on metadata types) by clicking the gray Filter button and selecting from the list of comparison option available: less than, greater than, less than or equal to, greater than or equal to, equal, or not equal. Then insert the value to filter contacts by and click the blue Apply button. The Filter button will now appear green. To remove a Filter, click the Filter button again and click Clear.

Filter the Report



You also have the option to filter the information found in any of these tabs by date contacts interacted with the tracker.

To do this:

- Locate the gray Filter button found at the top right-hand corner of any of the tabs in your report.
- Clicking the button will bring up a dropdown menu with two Click to Set Date fields.
- Click on either field to produce a dropdown calendar where you can choose the start and end date and times you would like to filter the report by.
- Click the blue Apply button in the dropdown to implement the filter, or click the Clear button to close the dropdown without creating a filter or to clear any filter currently applied.

