MARQUIS

MNET604	Campaign Tracking Report Procedure
Order of Steps	**Tasks**
Step 1	Log into Marquis Next
	Note: The landing page is the Institutional Dashboard, this is a preset page
Step 2	Click on “Discovery”
Step 3	Click on “Campaign Tracking”
Step 4	If your Campaign has already been set up, move to Step 11. Otherwise, continue to Step 5.
Step 5	Click on the green “Add New” box on the top right of the page
Step 6	Enter the name of the output you’d like to create in “Tracked Campaign Name”
Step 7	Select the date ranges you’d like to monitor for new accounts in the “Account Open Date Range” section.
Step 8	Select the Campaign(s) you’d like to track
	Note: If selecting a Trigger, you can select the Trigger Campaign Date Range you’d like to track as well
Step 9	Select the products you’d like to track in the “Select Direct Results” section
	Note: Override Campaign Cost…allows you to overwrite the campaign costs input when the campaign was initially created
Step 10	Select the Compare to Period
Step 11	Click “Save”
Step 12	Check the box in the Process column to the left of each Matrix you’d like to include in your output
	Note: to Edit or Delete the report, click on the title
Step 13	Select the Segment
Step 14	Select the Current Period
Step 15	Click “Process”
Step 16	Review the four Results tabs
Step 17	To Export, click on the Export drop-down and click Excel