Purpose

- This Ishbook will allow for both CS management and CSS to better manage their book of business by highlighting areas where information is missing on accounts.
- They will have an automated and easier way to view new accounts and what adjustments, if any, need to be made.

Requirements

- Run the New Account Checklist report for previous day spending advertisers on indexed campaigns in Adcentral
  - Use the the "First Commission Date" field in Adcentral, which fires an event titled "Started new commission period <date>"
  - There are 2 times the “Started new commission period <date>” event will fire in an AdCard, and this date is not static. It will fire when 1.) The advertiser spent for the first time and sales make commission from it, and 2.) The advertiser starts spending after being dark for 90 days. We don't need to look for dark accounts separately because this event fires when dark accounts begin spending again.
  - If an account was missing something when it first started to spend, and then again after 90 days and someone were to run the report for that length of time, we would want the output to show 2 line items (or more...depending on how far back someone looks).
  - We only want data to display when accounts are missing the fields/requirements listed below. If not possible, a second option would be to highlight the missing fields so it’s easier for CS to identify.
- Hyperlink the advertiser ids so that CS has an easy way to navigate to the account to make changes.
- Allow the date field to be customizable so that CS can run run the report daily, weekly, monthly, quarterly, and yearly.
- Ideally, have the Ishbook run by username. For example, if a manager runs the report, their respective accounts and the accounts for reps who report to him/her would display. If a CS rep were to run the report, their respective accounts would display.
  - ~~Second option would be to have it run based off of “manager” by using the Manager Index, which is pulled from Workday (index which was worked on by Srdjan & Danny).~~
  - Third option, and less ideal, would be to run the report by “team”, as it’s currently set up now. We want to make this as simple as possible for CS, so having them choose their specific team from a list isn’t that easy compared to the options above.
- On the manager view, display the CS rep assigned to a specific account.
- Display ONLY accounts that have missing fields/requirements:
  - Check for fields on the AdCard:
    - **URL**: Show up in report if the field is blank.
    - **Type**: Show up in the report if the field is blank or listed as "other".
    - **Industry**: Show up in the report if the field is blank or listed as "other".

Commented [1]: This is the date to display in the ishbook output

Commented [2]: Going to add a bit of complexity to get the correct rep assignments

Commented [3]: MVP for version 1

Commented [4]: Aquarium view should be able to cover this, need confirmation from BI

Commented [5]: Per Debola, we can't use the Workday index at the moment to pull this in, he set up a function to look at the different manager columns in the CS Team List for now

Commented [6]: _Marked as resolved_

Commented [7]: _Re-opened_

- **ATS**: Do not show up when it's listed as "No ATS". Only show up in report if the field is blank.
- **Tracking**: Currently, there is a small test where a "Tracking" option is included in the "Category" drop-down in the "Follow-Up" section in the AdCard. If possible, and if this becomes live, display when an account does not have that template stickied (More information to come about this as I'm speaking to CSP).

- If possible, check for some requirements within the campaigns themselves, so in addition, display the following information:
  - **Job Volume**: Show up in report if the campaign is "Active" with 0 jobs in it. This should be based on "campaign" level, not "advertiser" level, so all campaigns that were active (generated revenue), the day the commission date was triggered should display. **UPDATED: In order to display job volume we will show the FIRST hour of the NEXT day of "new commission start. [AN]**
  - **Nation/State**: Show up in report if the campaign includes both nation/statewide jobs.
    - If this data set is difficult to pull, and if possible, display if the campaign does not have "-locflags:cityempty" included in the "Keyword" section. Including that tag, eliminates any jobs from appearing in the campaign without a city, so this would be a good indication that nationwide/statewide jobs are not included within the campaign.
  - **Budget**: Show up in report if the campaign does not have a budget allocated to it.
    - Look to see if the campaign has a daily or monthly budget.
    - If budget not allocated within the campaign, check to see if an account level monthly budget is set.

2/2/2017 Notes regarding the Budget Output:

- ***https://adcentral.indeed.com/crm/history?aid=714069***
- ***株式会社JOBBANK*** *missing a budget and it appears in the search but nothing about a budget field*
- ***https://screencast.com/t/lWGR7Pf4v***
- *Also, should this say ZERO jobs? Per Amanda, it looks like on the 4th hour of next day the jobs should still be there based off of the adcentral logs*

BDX Notes:

DM:

- *Potential challenges: what do we do if a data point is not available? Can we build that out? The build time would need to be taken in consideration*
-

Commented [8]: This is a MUST

Commented [9]: +aneto@indeed.com to determine what day this should be flagged; for example, if a CS rep runs report for [01-01-17 to 01-08-17], and an advertiser had a new commission date of [01-05-17] do we want to see the job counts for the last day in the date range (so whatever the job count was on [01/07], since IQL is a day behind) OR do we want to see job count on the day the new commission period STARTED [01-05-17].

Either way we won't use the index to look at hourly job counts, since we saw a lot of volatility for just one campaign (also probably explains the long run times for the ishbook)

Commented [10]: +dmoncada@indeed.com - Like we discussed, can we base the logic off of the hour after the account started the first commission period? So essentially if they do a date range - 01/01 to 01/17, display any advertisers with a new commission period in that range. Then for their campaigns, what was the job count the hour AFTER the new commission period started - if ZERO, flag this.

Commented [11]: +dmoncada@indeed.com As discussed, in order to display job volume we will show the FIRST hour of the NEXT day of "new commission start.

- *ATS looks at claimed sources in AggCentral to populate the adCard*
- *MVPs for first iteration: The campaign components: Job Volume, Nation/State, Budgets (possibly leverage **adperformance**)*
- ~~*We need to do the investigation, specifically Job Volume metrics*~~
- ~~*Pull the list of accounts based on rep/manager name INSTEAD of team*~~
    - ~~*Follow-up for Debbie: in the aquarium view, can we have all reps under a manager displayed in the results as well?*~~
- *Build out first iteration and have a few pilot teams test it out to make sure it works ok and get feedback on it, before we start to think about rolling it fully in aquarium*
- *If doing a weekly look-back, so let's say Monday through Friday, on Tuesday we would want to show the Monday's accounts with blank info. Quick caveat here: this is going to change the logic quite a bit since we need to get the accounts the rep were assigned to at the TIME "First Commission Date" fired*

12/19 Notes:

DM - ~~*Per Adebola, what do we for shared support teams? Determination is that if the account is listed under "smbsupp", "emeasharedsupport" we list the accounts as the Shared Support team name, SMB Support, EMEA Shared Support*~~

- ~~*Adebola to build a pilot ishbook that BDX can run/QA for testing purposes, to see if the logic that was discussed is working as expected*~~

01/11/17 Notes (based on V1):

~~*-Display the "First Commission Date" field*~~

~~*-Remove "Time zones", "Elapsed time since transaction", "Billing_country" from the output that is displayed*~~

~~*-Instead of populating ALL results - only show lines that have blank values AND somehow flag those - maybe through highlighting them?*~~

~~*-Change the "rep_name" output to the CS Rep's full name*~~

~~*-Still seeing some discrepancies with the job counts and volume (**BDX to help investigate**)*~~

-"Budget" needs to be flagged/populated for each campaign

~~*-For timezone information, pull directly from the CS Team List using the "Location" column I - instead of pulling from the separate document created (NO LONGER NEEDED)*~~

- Can we flag the "new_commission_date" event by THE HOUR - and then highlight job counts for each active campaign for the FOLLOWING hour?

1/25/2017 Notes (based on QA)

- ***Use job counts from 4th hour of next day (more accurate, gives rep more time to check their accounts, and not much longer than that time frame***

- ***De-dupe the extra advertisement_ids and only show one line***
- ***Remove the advertisement_id, billing_country, remove the account_email***
- ***Add in Budget, URL fields***

Results from first version of QA with Amanda on 01/13/2017:
Rep name/team name: **katrine - CSAgenciesSTM2**
Test query 1 - 01/01/2017 to 01/07/2017
Test query 2 - 01/01/2017 to 01/09/2017

- When we EXPAND the date range, instead of keeping the first accounts populated in the original pull, it actually removed them and only populated one result. It should be flagging these accounts
- **6931460- 1/3**
- **2013088- 1/3**
- 7954894- 1/4
- 7557764- 1/5
- **2667966- 1/9**

-We want to flag ACTIVE campaigns with ZERO job volume - that means they should be paused

-For test query 1, 2013088 should NOT be flagged because there is an Active Campaign with 1 job in it.

#Screenshot: https://www.screencast.com/t/rLBerKaRxDH

-For test query 1, 6931460 SHOULD be flagged because there is an Active Campaign with 0 jobs in it.

#Screenshot: https://www.screencast.com/t/hhpQS2uQuCG

++ We have to identify ACTIVE campaigns for each advertisers with ZERO jobs

Additional requirements - V2 nice to haves

After meeting with a handful of managers to collect feedback on this initiative, there were a few additional requirements they asked if we could include, as it would assist their teams to better manage their accounts. The following requirements could pertain to hybrid, indexed, or hosted accounts.

- Display if the Company Page status in the AdCard is listed as “Pending”.
- Display if the “Host a Job” status in the Adcard is listed as “Pending” or “Enabled”.
- Display the date of the last time the rep logged in to the account.

BDX Notes:

DM:

- *For bullet # 1, we can use **plus.get_claimed_sources***
- *For bullet # 2, we can leverage a PLUS call to pull that information in from the adCard*
    - *PLUS column (**showHostedJobs**)*

- *# 3, we can use **advertiserevent**, where activity_type = LOGIN and rep_username is the one flagged, group by date/time to get the last log-in date*