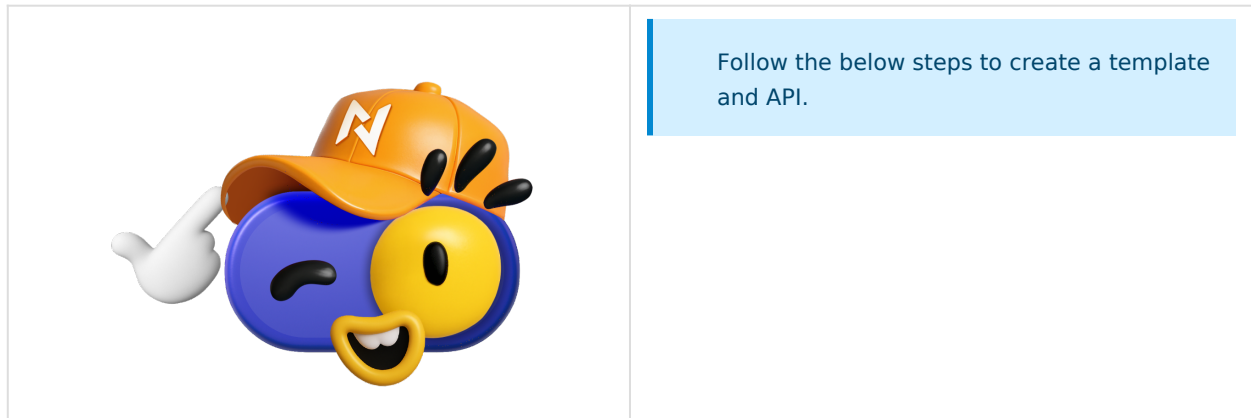
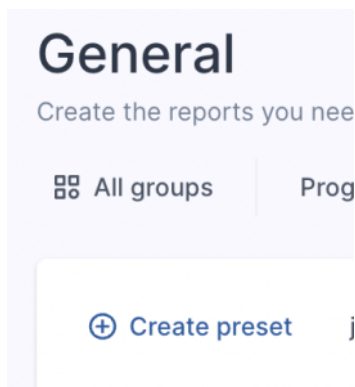


How to Create API Reports



1. Go to Reports - General
2. Select your desired outputs, e.g. group bys, date range, columns and split bys
3. Select Create Preset



4. Insert a name and click Create preset

Create Name before share

Use presets for quick API availability.

Name

50 characters left.

Cancel

Create preset



Click the Save icon to the bottom right, to keep it saved in your top 5 presets.

5. Upon click you will then be shown the API screen:

Edit preset

Use presets for quick API availability and Restrict access.

Name

By Brand By Geo

35 characters left.

API availability

Make report preset available via API link

Regenerate

Copy link

Restrict access

Add username and password

Cancel

Save changes

Copy the API Link for instant access outside of ReferOn. This will instantly download a CSV upon use.

Use restricted access if sharing with third parties.

6. Upon saving, it can then be found via the Open icon (three dots) to the right. To bookmark it to the preset toolbar check the bookmark icon:

