CAMPAIGN CP102 LAB MANUAL

CP102.1: CREATE AN AUDIENCE LIST

Create a new Audience list and add yourself as test user:
1. Select the Lists icon from the left navigation
2. At the top of the screen click Create new
3. Select the Audience square
4. Name the list: Contest Audience
5. Click Create
6. Click the Contacts square on the main screen
7. Click New Record at the top of the screen
8. The Record details pop up appears. In the MAIL field, enter your email address
9. In the NAME field, enter your full name with proper casing
10. To designate this record as a test user, enter 1 in the TESTUSER field
11. Click OK

This completes this lab.

CP102.2: CREATE PROFILE EXTENSION LISTS

Create the Loyalty Profile Extension list:
1. Select the Lists icon from the left navigation
2. At the top of the screen click Create new
3. Select the Data list square
4. Name the list: Loyalty
5. Click Create
6. Click the columns square on the main screen

Add the fields necessary to store loyalty card information:
7. Click New Field from the top of the screen
8. In the Field properties panel to the right, enter the name: USERID
9. Set the field type to Numeric
10. Click Save and create new field
11. In the Field properties panel to the right, enter the name: LOYALTYCARD
12. Set the field type to Boolean
13. Click Save and create new field
14. Again, in the field properties panel, enter the field name: POINTS
15. Set the field type to Numeric
16. Click Save

Link the Profile Extension List to the Audience list.

17. From the horizontal top bar, click the Lists icon to return to the home screen
18. Select the Contest Audience list
19. Click the Lined lists square
20. Click New Link at the top of the screen
21. Enter the scope: LOYALTY
22. Set the Relation as 1:1
23. Select Loyalty from the slave list drop down
24. Set the USERID field as the matching key
25. Click OK
26. Click the Plus tab on the Horizontal tab menu
27. Select Data list

Create the Contest Profile Extension List:

28. Enter the name: Contest Moment
29. Click Create
30. Click the Columns square on the main screen

Add the fields necessary to store contest entry information:

31. Click New field from the top of the screen
32. In the Field properties panel to the right, enter the name: USERID
33. Set the field type to Numeric
34. Click Save and create new field
35. In the Field properties panel to the right, enter the name: ANSWER
36. Set the field type to text
37. Enter the length 500
38. Click Save

Link the Profile Extension List to the Audience list.

39. Open the Contest Audience list
40. Click the Linked lists square from the middle of the screen
41. Click New link at the top of the screen
42. Enter the scope: CONTEST
43. Select the 1:1 relation
44. Select Contest Moment as the slave list
45. Select USERID as the matching key field
46. Click OK

This completes this lab.

CP102.3: IMPORTING LISTS

ASSETS REQUIRED: CP102-coursework-assets.zip

Import new data to the Audience list:
1. Select Contest Audience from the tree view of the Lists menu
2. Select Import Data from the top of the screen
3. Browse and locate audience-import.csv from the coursework zip folder
4. Set the delimiter to comma
5. Check First row has column names
6. Ensure the preview for the file loads in the window provided and click Next to continue

Define import settings:
7. Select Merge with existing list
8. Select USERID as the source key and ID as the destination key
9. Click Next
10. Confirm MAIL, and NAME are mapped to the fields of the same name
11. Click Next
12. Click Start to begin the import
13. When the process has completed, click Finish

Import new data to the Loyalty Profile Extension List
14. Select the Loyalty list from the tree view of the Lists menu
15. Select Import Data from the top of the screen
16. Browse and locate loyalty-import.csv from the coursework zip folder
17. Set the delimiter to comma
18. Check First row has column names
19. Ensure the preview for the file loads in the window provided and click Next to continue

Define import settings:
20. Select Merge with an existing list
21. Set the source key to USERID and the destination key to USERID
22. Click Next
23. Confirm LOYALTYCARD, and POINTS are mapped to the fields of the same name
24. Click Next
25. Click Start to begin the import
26. When the process has completed, click Finish

This completes this lab.

CP102.4: SEARCH LISTS

Conduct a search for contacts in the Audience list:
1. Select the Lists icon from the navigation on the left
2. Select the Contest Audience list
3. Click the contacts square on the main screen
4. On the query screen next to TESTUSER, select the operator equals (=)
5. In the field value for TESTUSER enter: 1
6. Click Query at the top of the screen
7. The results should include the record you made for yourself when creating the Audience list

This completes this lab.

CP102.5: CREATE AN AUDIENCE SEGMENT

Create an Audience list segment of loyalty card holders:
1. Select the Contest Audience from the tree view of the Lists menu
2. Click the Segments square from the main screen
3. Click New dynamic segment from the top of the screen
4. Enter the name: Has Loyalty Card
5. Click Edit filter
6. From the Attribute tab, select the list Loyalty
7. Select the field LOYALTYCARD
8. Set the operator to Equals and enter the value of 1
9. Click OK on the Filter Designer
10. Click Save on the main screen to save your segment.

Create an Audience list segment of non-loyalty card holders:
11. Select the Contest Audience from the tree view of the Lists menu
12. Click the Segments square from the main screen
13. Click New dynamic segment from the top of the screen
14. Enter the name: No Loyalty Card
15. Click Edit filter
16. From the Attribute tab, select the list Loyalty
17. Select the field LOYALTYCARD
18. Set the operator to Is empty (null)
19. Click OK on the Filter Designer
20. Click Save on the main screen to save your segment

This completes this lab.