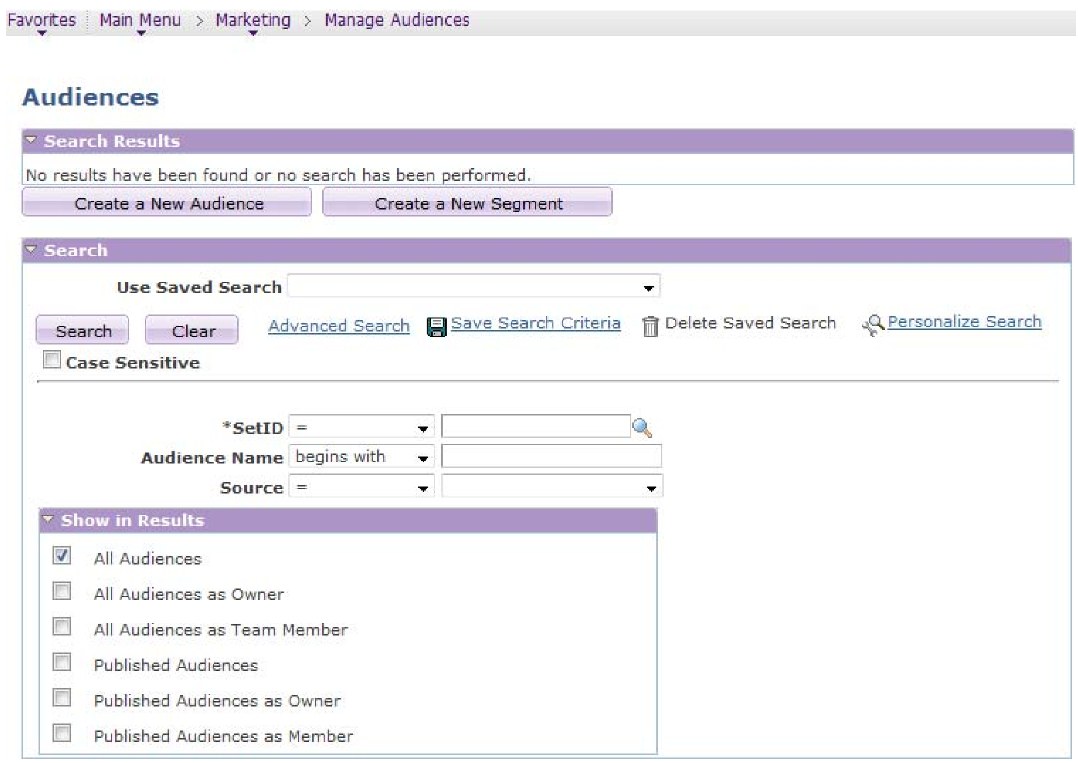
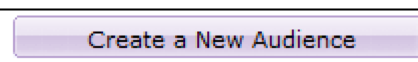
University of Northern Iowa

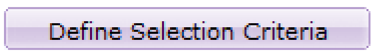
CRM – Creating an Audience using Audience Builder

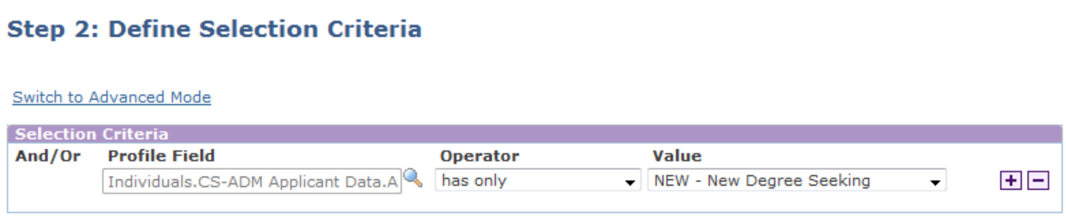
Purpose: An audience is a group of people you want to reach with your online dialog. The audience can be a list of names that already exist in the system (an internal audience), or names from an external source, such as a mailing list or respondents to a banner ad. Follow the instructions below to create a new audience in CRM using Audience Builder.

Step	Action
1.	In CRM, navigate to the **Manage Audiences** page. Select **Main Menu › Marketing › Manage Audiences** ***Note:*** You may also create an audience via the ***Audiences*** **tab** in the **Dialog Designer.** 
2.	Click the **Create New Audience** button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3.</td><td>On the Audience Detail tab, complete the following:

Audience Name – Enter as desired, using appropriate naming convention
Audience Source – Select Internal Using Audience Builder
Owner Name – Select if applicable
Description – Enter detailed description
Status – By default, In Design is selected. Updated as applicable. The statuses are: In Design, Designed, Scheduled, Processing, Generated, Approved, Committed, and Archived.

Note: The Published and Secured Audience checkboxes are not currently used.</td></tr>
<tr><td>4.</td><td>Click the Define Selection Criteria button.

</td></tr>
<tr><td>5.</td><td>In Step 1, select Consumer and click the Next Step button.

</td></tr>
<tr><td>6.</td><td>In Step 2, define the selection criteria by entering the Profile Field, Operator, and Value. Continue to add criteria by clicking the Add a New Row button.

</td></tr>
<tr><td>7.</td><td>When finished adding criteria, click the Next Step button.</td></tr>
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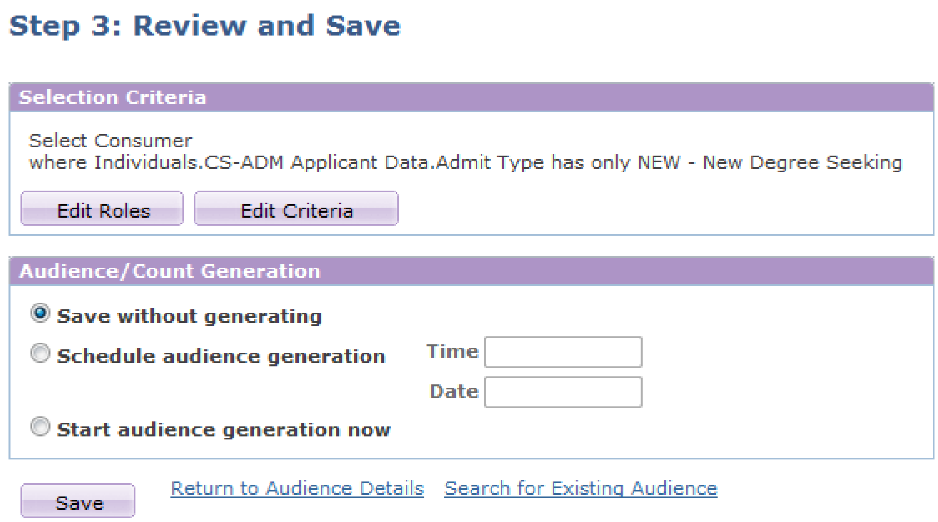
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8.</td><td>In Step 3, review the selected criteria. Use the Edit buttons to change criteria.


<table>
<tr><th>If you select…</th><th>Then…</th></tr>
<tr><td>Save without generating</td><td>The audience is saved, but must be generated via the Audience tab before using.</td></tr>
<tr><td>Schedule audience generation</td><td>You must enter a time and date for the audience to generate automatically</td></tr>
<tr><td>Start the audience generation now</td><td>A process instance is assigned and the process run status changes to Queued. The status at the top in the Status field will reflect “Processing”. See step 11 for details.</td></tr>
</table></td></tr>
<tr><td>9.</td><td>Click the Save button.</td></tr>
<tr><td>10.</td><td>If you selected Start the audience generation now, you may view the process run status at the bottom of the Audience Detail tab.

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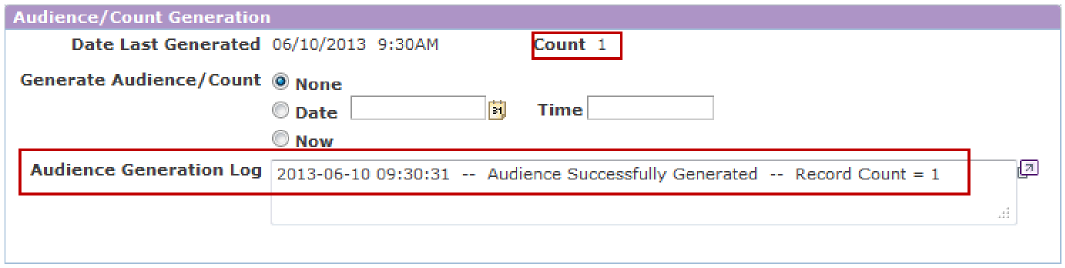
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11.</td><td>

Click the **Refresh Status** button to view the audience *Count* and *Audience Generation Log*.



Note: You may also click the Process Monitor link to view the status of the process.

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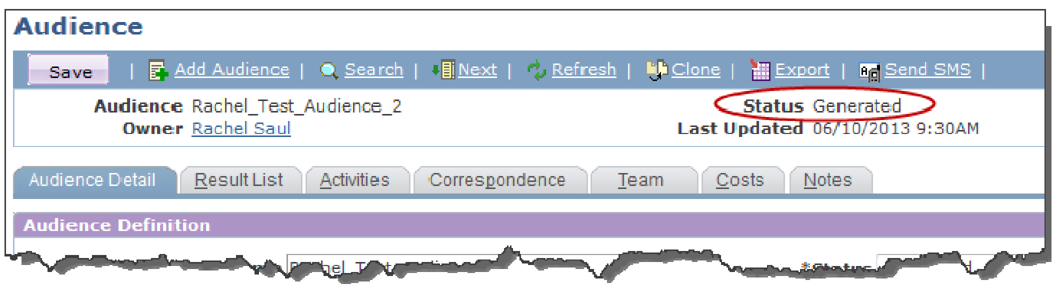
<tr><td>12.</td><td>

Once the audience has been generated, the status of *Generated* displays at the top in the **Status** field. Other possible values are: *In Design*, *Designed*, *Scheduled*, *Processing*, *Approved*, *Committed*, and *Archived*.



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