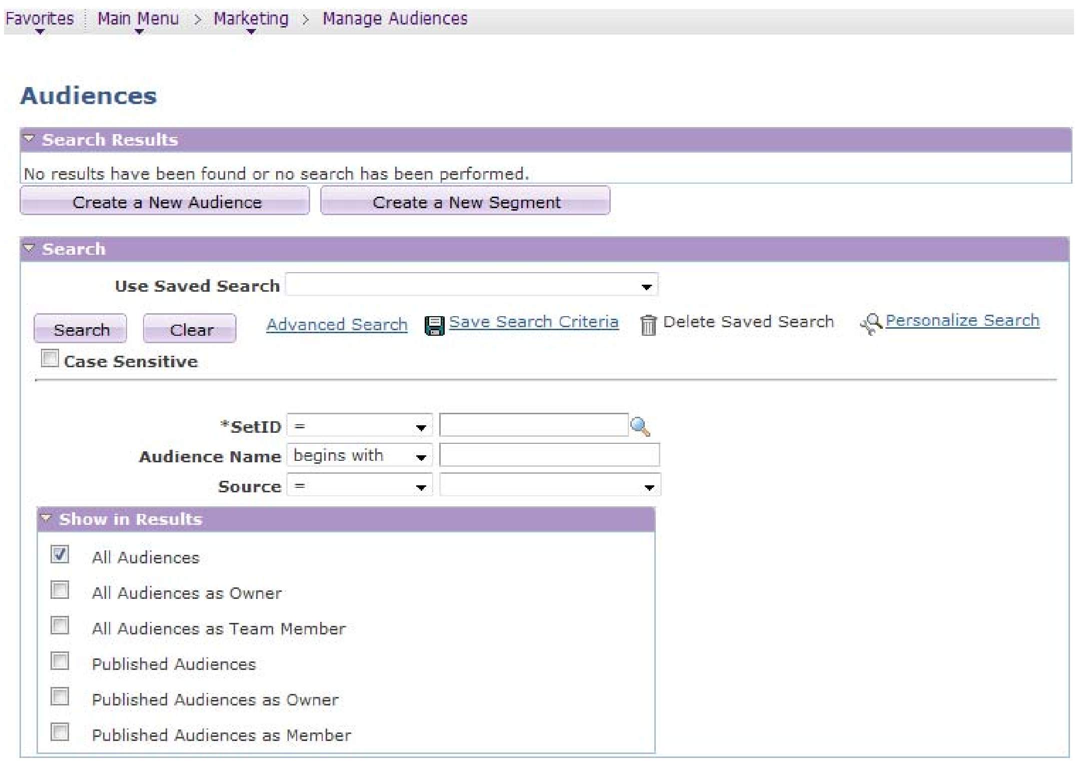
CRM – Creating an Audience using PS Query

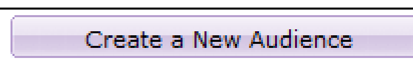
Purpose: An audience is a group of people you want to reach with your online dialog. The audience can be a list of names that already exist in the system (an internal audience), or names from an external source, such as a mailing list or respondents to a banner ad. Follow the instructions below to create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

NOTE: Use Query Manager in CRM to build your query first. See Appendix for instructions on using the BO_BASIC _IND table to create an audience query.

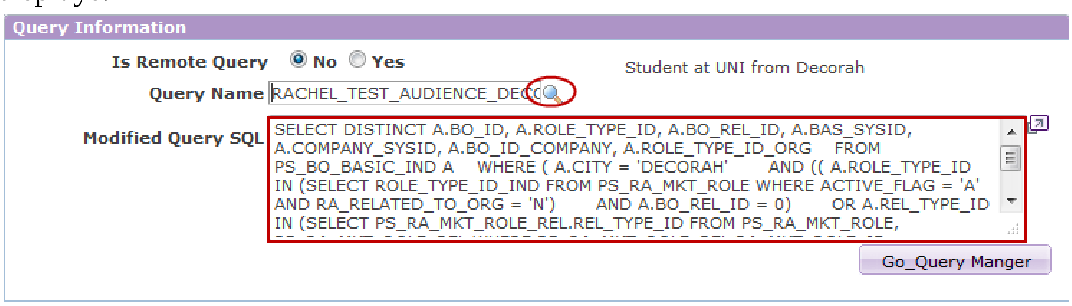
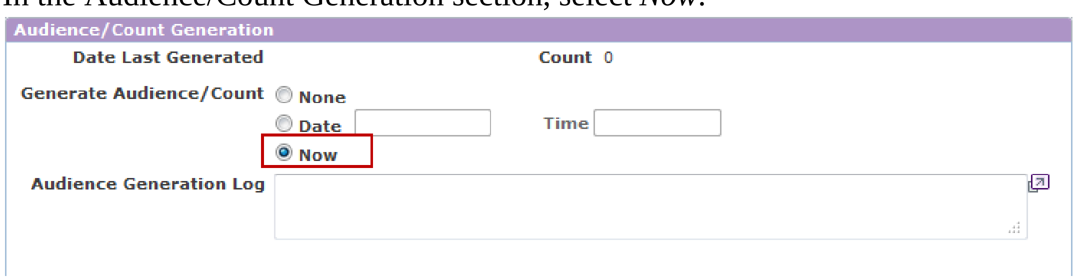
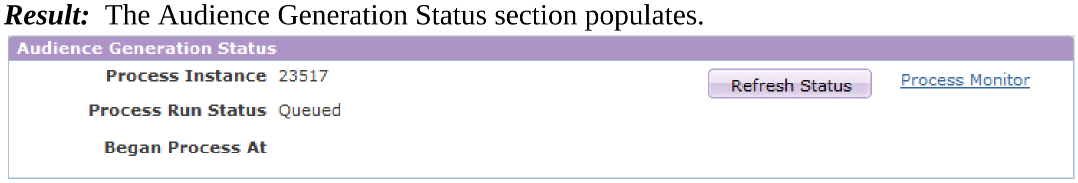
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>In CRM, navigate to the Manage Audiences page. Select Main Menu › Marketing › Manage Audiences

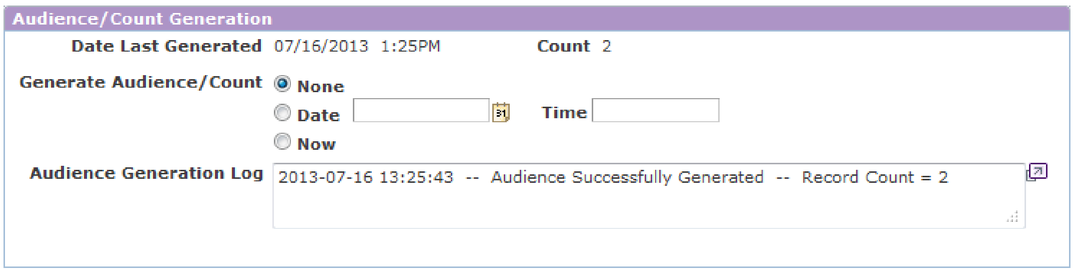
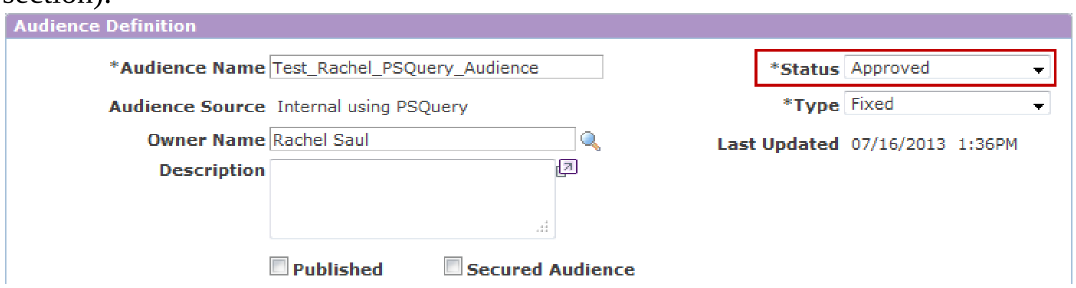
Note: You may also create an audience via the Audiences tab in the Dialog Designer.



</td></tr>
<tr><td>2.</td><td>Click the Create New Audience button.


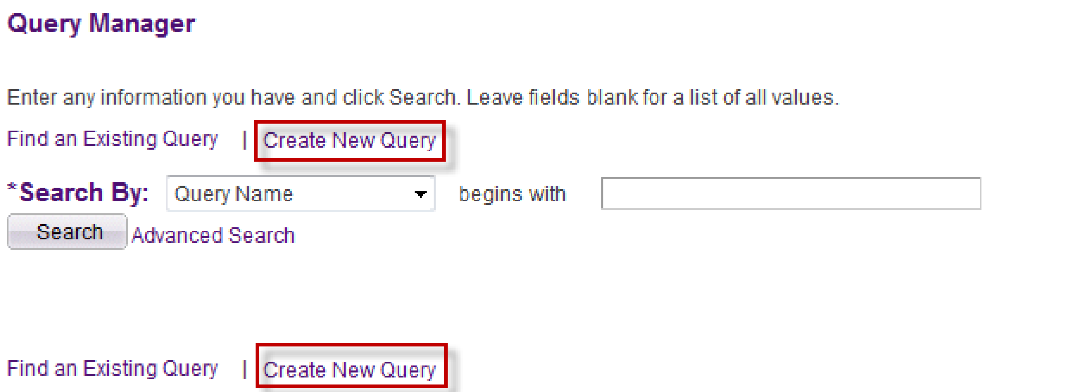
</td></tr>
</table>

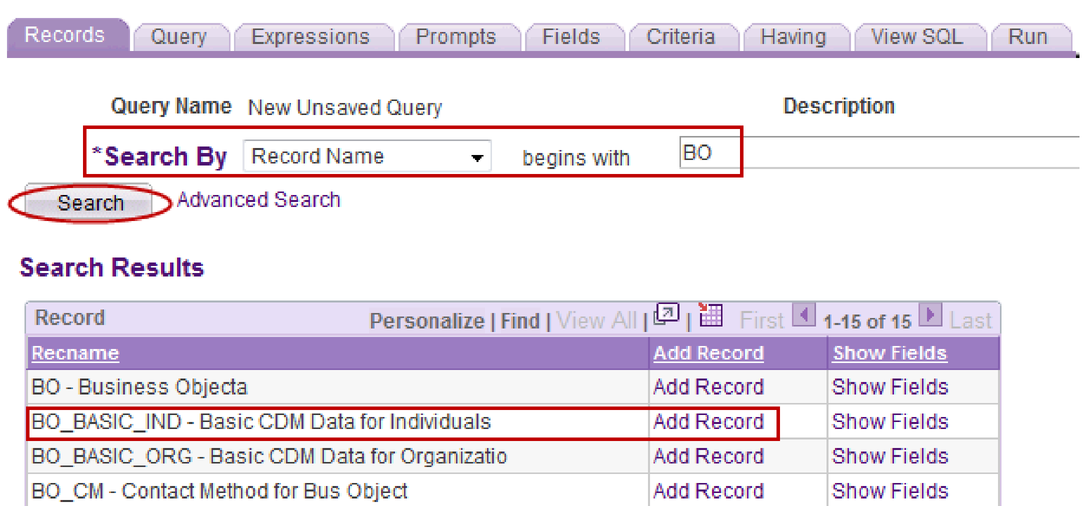
Step	Action
3.	On the ***Audience Detail*** tab, complete the following: • **Audience Name –** Enter as desired, using appropriate naming convention • **Audience Source –** Select *Internal using PS Query* • **Owner Name –** Defaults to yourself, select if applicable • **Description –** Enter detailed description • **Status –** By default, *In Design* is selected. Updated as applicable. The statuses are: *In Design*, *Designed*, *Scheduled*, *Processing*, *Generated*, *Approved*, *Committed*, and *Archived.* • **Type –** Defaults to *Fixed*. Select *Dynamic* if applicable. Fixed audiences are static and do not change. Dynamic audiences will change as new consumers meet the criteria. ***Note:*** The **Published** and **Secured Audience** checkboxes are not currently used.
4.	In the Query Information section, select the **Query Name.** The query's SQL displays. 
5.	In the Audience/Count Generation section, select *Now*. 
6.	Click the **Save** button at the bottom of the page. ***Result:*** The Audience Generation Status section populates. 

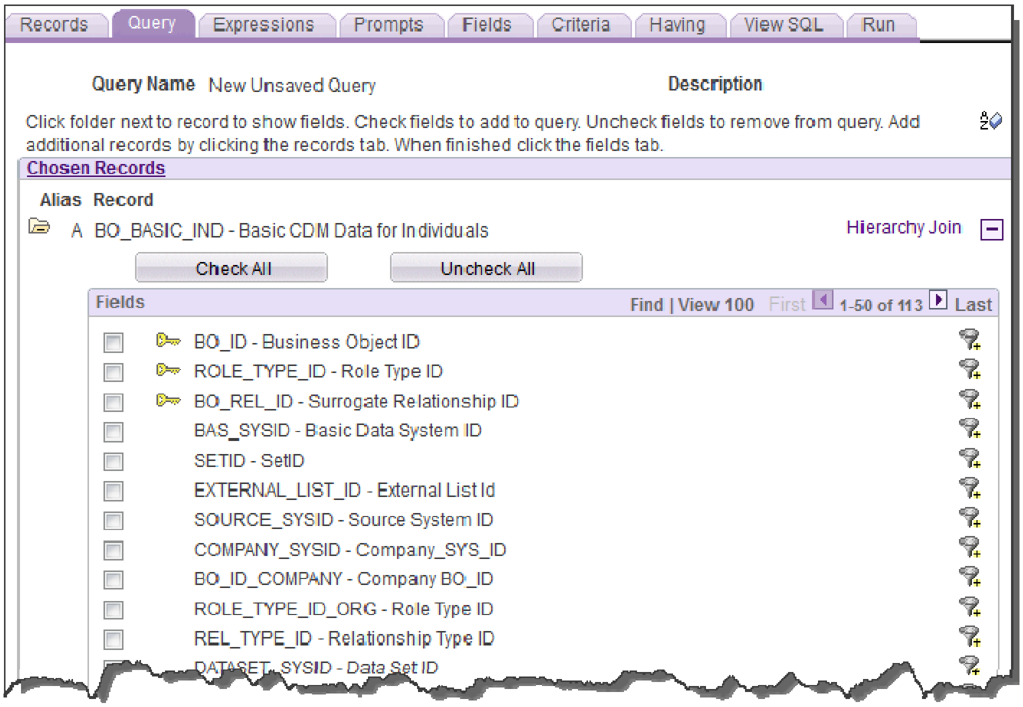
Step	Action
7.	Click the **Refresh Status** button. ***Note:*** You may also click the Process Monitor link to view the status of the process.
8.	The **Audience/Count Generation** section is updated with the *Count* and *Log*. 
9.	Change the **Status** field from *Generated* to *Approved* (In the Audience Definition section). 
10.	Click the **Save** button.

Appendix – Build Audience Query

Purpose: The instructions below describe how to build an audience query using the BO_BASIC_IND table in Query Manager (in CRM).

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Query Manager page. Select Main Menu › Reporting Tools › Query › Query Manager</td></tr>
<tr><td>2.</td><td>Click the Create New Query link at the top or bottom.

</td></tr>
<tr><td>3.</td><td>Use the Records tab (aka table) to select the BO_BASIC_IND record.
TIP: Use the Search By field to search and find the correct record.

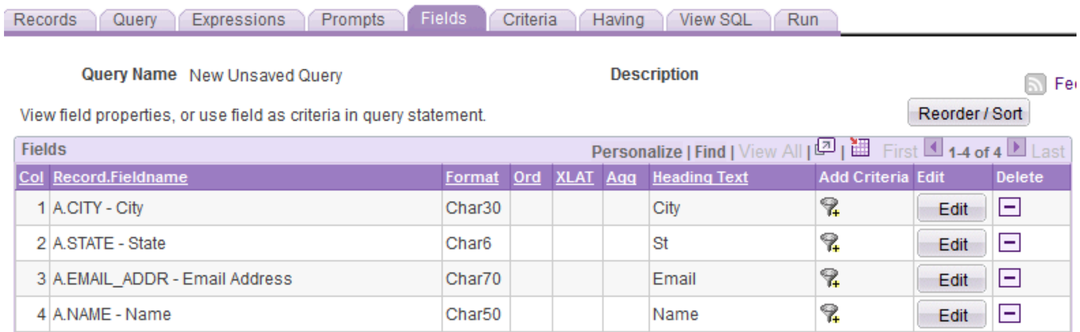
Select the Add Record link for the BO_BASIC_IND record.

</td></tr>
</table>

Step	Action
4.	On the **Query** tab, select the fields you wish to display (as columns) in your results. NOTE: You may need to page forward to see all the available fields.  ***Note:*** If fields from multiple Records are needed for one report, a join must occur. Records are joined by common key fields. To join a Record, add the first Record and select the desired fields. When the ***Records*** tab is selected again, the **Join Record** link displays. Select the **Join Record** link for the Record you wish to add.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>

Click the *Fields* tab.

Result: The selected fields display on the *Fields* tab.



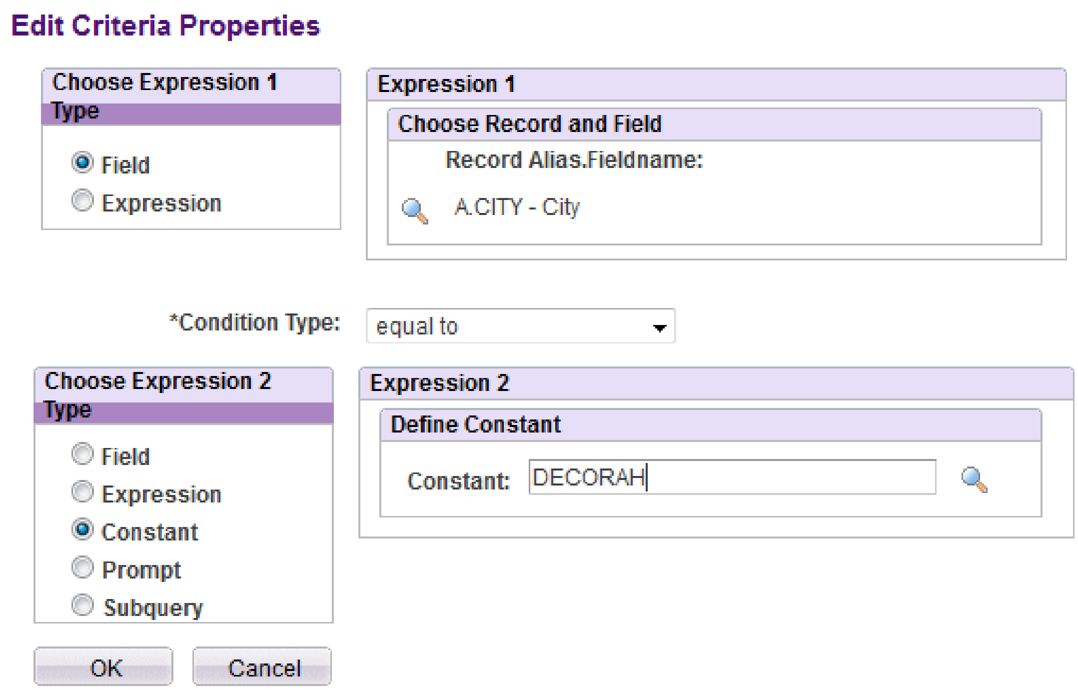
NOTE: To change the order of the columns that the fields are displayed in, click the **Reorder / Sort** button. Reorder / Sort

</td></tr>
<tr><td>6.</td><td>

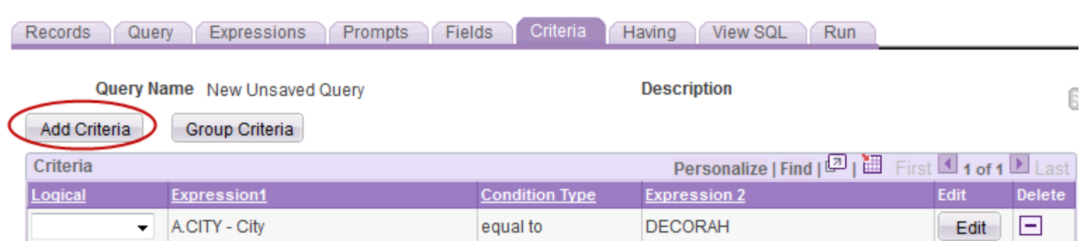
Select the ***Criteria*** tab to add specifications to the query. Click the **Add Criteria** button.

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>
Select the appropriate field, condition, and constant.
Example shows City equals “Decorah”.
Important: Type constants exactly how they display in the database, using correct upper or lower case.



Note: You may select Prompt in the Expression 2 field to create a prompt. When the user runs the report, they will be prompted to input the value for this field.
</td></tr>
<tr><td>8.</td><td>
Click the OK button. Continue to add criteria on the Criteria tab by clicking the Add Criteria button.



NOTE: You may add criteria for any field in the record, it does not have to display in the query. (E.g. If displaying students from Decorah, you can add the above criteria, but you don’t have to display a column with “Decorah” listed in every record).
</td></tr>
<tr><td>9.</td><td>
To save the query, click the Save As link.
Tip: Save As after editing fields.
</td></tr>
</table>

Step	Action
10.	Complete the following: • **Query** – Enter a name for the query. ***Note:*** The query name may only contain letters, numbers or underscores (NO SPACES), follow naming convention • **Description –** Enter a brief description (optional). Entering a description here allows you to search by keywords when trying to find a query. • **Folder –** Enter a folder name (you create it by entering it here), if you wish to store this query in a folder. • **Query Type –** Select *User*, *Archive*, *Process*, or *Role*. Standard queries are defined as *User*, and queries that use workflow are defined as *Process* or *Role*. *Archive* is used to identify queries that may be stored for now and used later. • **Owner –** Select *Private* or *Public*. A *Private* query can be accessed and modified by only the user who created the query. However, any user who has access to the query records can run, modify, or delete a *Public* query. It is recommended that all queries are saved as *Public*, for support purposes and future access. • **Query Definition –** Enter a more complete description of what the query entails (optional). ***Note:*** The query name may only contain letters, numbers or underscores. The **Query**, **Description**, **Folder**, **Query Type**, and **Owners** fields may be used to search for a query. Click the **OK** button.
11.	To run the query, click the ***Run*** tab ***Results:*** The query displays on the Run tab.