

Quick-start Guide: Creating a Basic Selection

Introduction

This Quick-start Guide will take you through, step-by-step, the actions required to create a basic Selection to be used in a Dialog.

The Guide is intended for beginners with little to no experience with using Visual Dialog. As your skills increase, this basic Selection can be expanded and refined upon for more detailed and complex Selections.

As this is a Quick-start Guide, we will only take you through some of the more common methods of designing your Selection. These being, Simple, Questionnaire, Dialog, Email Tracking, Link Tracking, and Lists criteria.

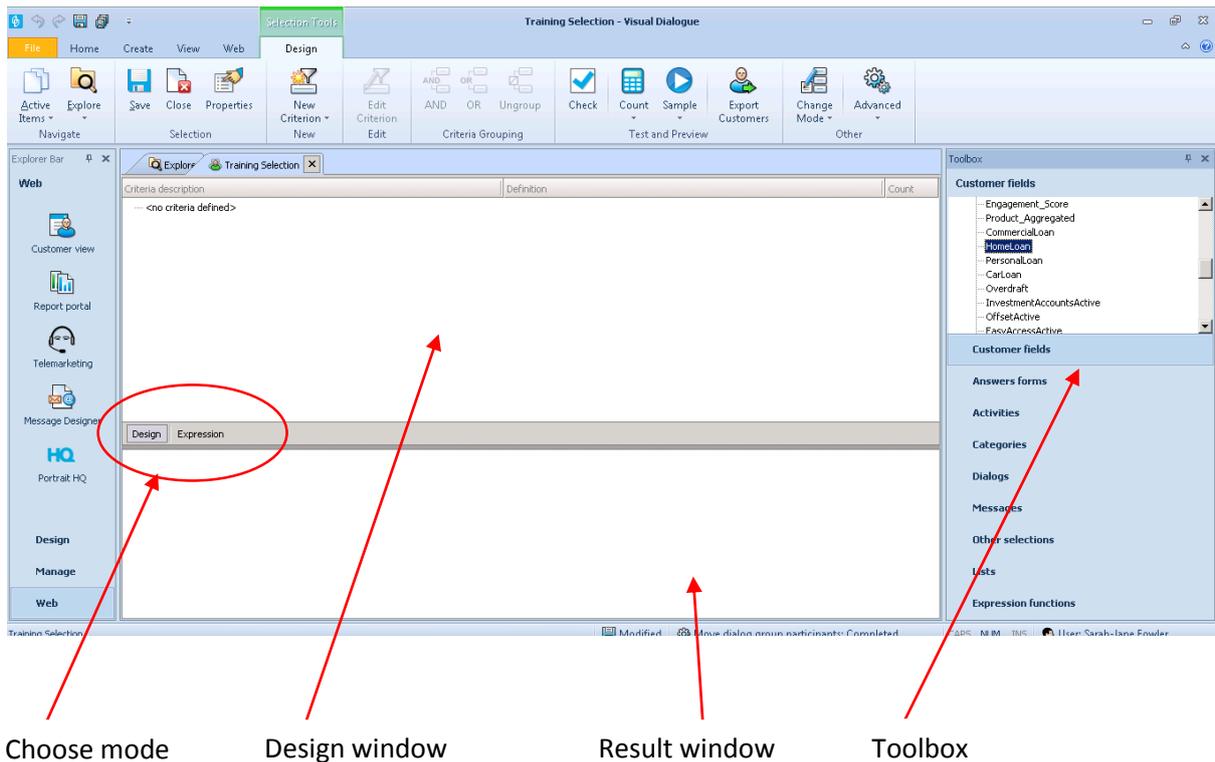
Good luck, have fun and remember if you get stuck or have any questions you can always email Sarah at Spark – sjfowler@spark.com.au

Stage 1: Creating the new Selection file

1. In the Create tab, click on “Selection”. The following New Selection Wizard box pops up. Enter the Selection name and Description.



2. You are now presented with the following screen. See below for labelled areas that will be referred to through-out this Quick-start Guide.

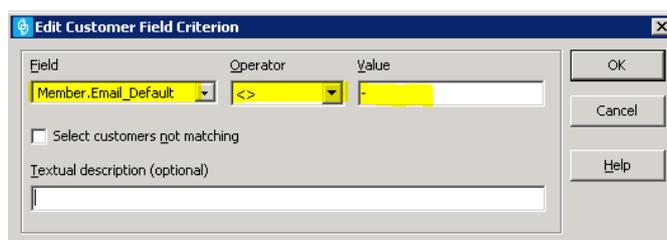


You are now ready to add criteria to your new Selection!

Stage 2: Designing and adding criteria to the Selection

The following is a list of methods available to use when designing and adding criteria to your selection.

1. **Simple Criteria:** For simple customer data as name, address etc **the Toolbox tab 'Customer Fields' is used.** If for example you want to select only members that have an email address then you would:
 - a. Double-click the desired Customer Field – in this example that would be Member.Email_Default
 - b. Select the desired Operator – in this example that would be '<>'
 - c. Enter the Value – in this example that would be '-' (i.e. the email field is blank). Your pop-up box should look similar to this:



- d. Click OK to close. You'll now see that your new Selection query has started taking form in the Design window. It should look similar to this:

Criteria description	Definition	Count
...Member.Email_Default <> ""	Member.Email_Default <> ""	

- e. You can repeat the process to add more criteria to your Selection or you can use other criteria selection methods from your Toolbox (we'll go through those options next). Alternatively you can leave it as is and don't forget to click Save!

2. **Questionnaire Criteria:** For selections on questionnaire data, use the 'Answer forms' **Toolbox tab**. If for example you want to select members that have answered 'Yes I will be attending' in response to a particular event then you would:

- a. Double-click on the relevant Questionnaire
 - b. Select the relevant question from the Question column
 - c. Check the box to indicate the response that you desire from the Alternative column.
- Depending on your context, your pop-up box should look similar to this:

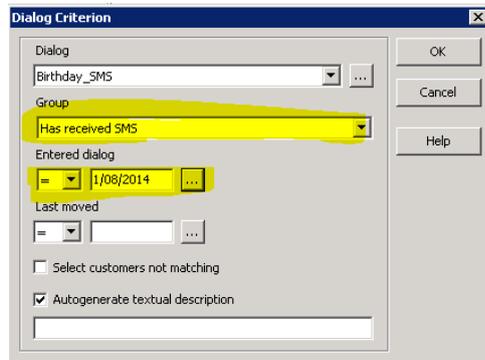
- d. Click OK to close. You'll now see that your new Selection query has started taking form in the Design window and should look similar to this:

Criteria description	Definition	Count
...Please indicate your attendance below. (Q1): A1 "	AnswerCombination(1005, "Q1", "A1", TRUE, TRUE, FALSE)	

- e. You can repeat the process to add more criteria to your Selection or you can use other criteria selection methods from your Toolbox. Alternatively you can leave it as is and don't forget to click Save!

3. **Dialog Criteria:** For selections on dialog data **the Toolbox tab 'Dialogs' is used**. You would use this if you wanted to select members who are participants in a certain dialog and placed in a defined dialog group. For example if you wanted to select members that received a Happy Birthday SMS then you would:

- a. Double-click on the relevant Dialog from the list that appears in your Toolbox – in this example that would be Birthday_SMS
- b. Select the Group of members that you desire – in this example that would be 'Has received SMS'
- c. Choose the desired date that members would have entered the Dialog. Depending on your context, your pop-up box should look similar to this:

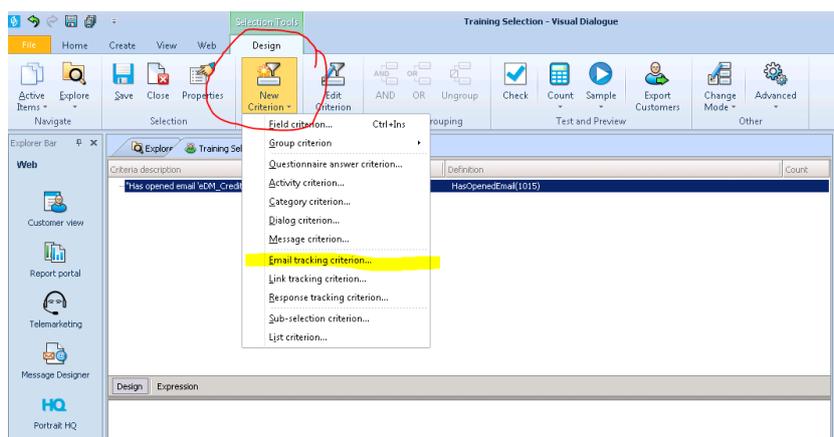


- d. Click OK to close. You'll now see that your new Selection query has started taking form in the Design window and should look similar to this:

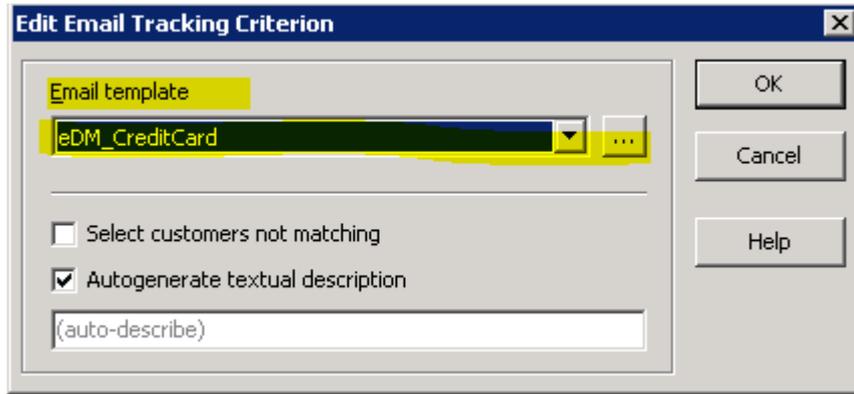


- e. You can use other criteria selection methods from your Toolbox or you can leave it as is and don't forget to click Save!

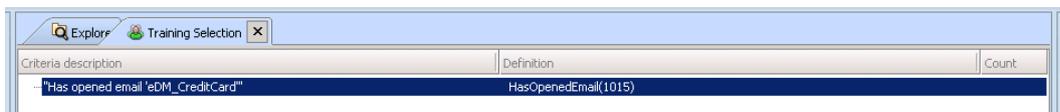
4. **Email Tracking Criterion:** You would use this if you wanted to select members who have received and opened an EDM. For example if you wanted to select members that received and opened an EDM promoting a Credit Card campaign then you would:
 - a. Click on the 'New Criterion' icon from the Section Tools bar (top of page), then select 'Email tracking criterion'. See example below:



- b. Select the desired Email template – in this example it would be the EDM_CreditCard template. Depending on your context, your pop-up box should look similar to this:



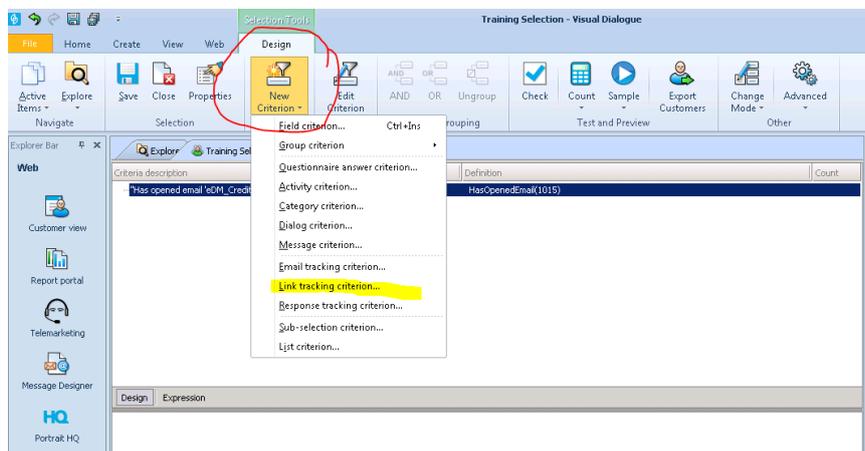
- c. Click OK to close. You'll now see that your new Selection query has started taking form in the Design window and should look similar to this:



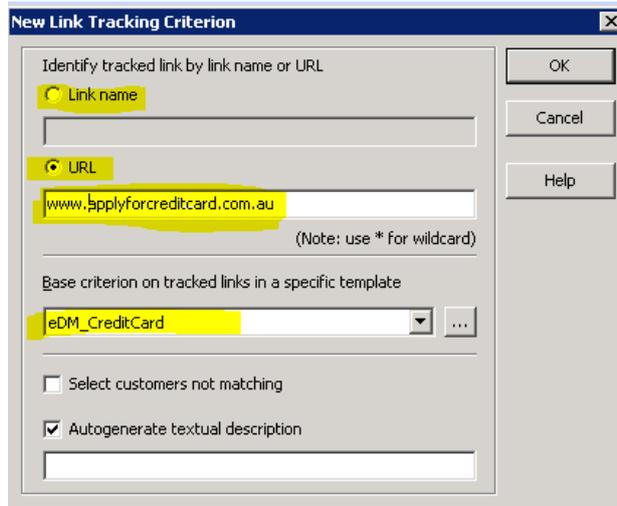
- d. You can use other criteria selection methods from your Toolbox or you can leave it as is and don't forget to click Save!

5. **Link Tracking Criterion:** You would use this is you wanted to select members who have clicked on a particular link within an eDM. For example if you wanted to select members that clicked on the Apply link within an eDM promoting a Credit Card campaign then you would:

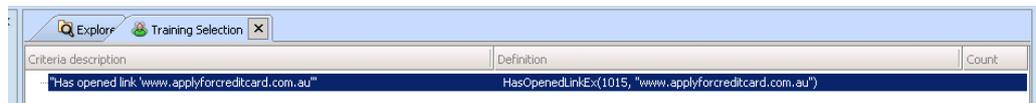
- a. Click on the 'New Criterion' icon from the Section Tools bar (top of page), then select 'Link tracking criterion'. See example below:



- b. Click on the desired tracked Link name or enter the desired tracked URL that you would like and select the template that the Link or URL resides. Depending on your context, your pop-up box should look similar to this:



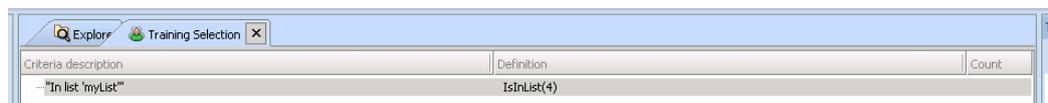
- c. Click OK to close. You'll now see that your new Selection query has started taking form in the Design window and should look similar to this:



- d. You can use other criteria selection methods from your Toolbox or you can leave it as is and don't forget to click Save!

6. **Lists Criteria:** For selections on Lists data **the Toolbox tab 'Lists' is used**. If you wanted to select a list of members that you previously created, for example through Web HQ Explorer, then you would:

- Double-click on the relevant List from the list that appears in your Toolbox
- Click OK to pass through and close the next pop-up box. You'll now see that your new Selection query has started taking form in the Design window and depending on your chosen list, should look similar to this:



- c. You can use other criteria selection methods from your Toolbox or you can leave it as is and don't forget to click Save!

CONGRATULATIONS! You have now created your first Selection. This will start you on your way to creating more complex and valuable Selections in the future.