



Creating Attributes & Filters

What is the purpose of Attributes & Filters?

Attributes are tags that help your partners locate marketing materials using filters. Partners can select multiple attributes at once — to quickly narrow down options to fit the needs of the marketing activity.

Attributes can also be used in reporting to measure and compare tactics and campaigns based on criteria.

How do I create them?

Attributes are created based on specific criteria. For example, you can set up an attribute to select a specific language, product or service, campaign type, and much more. While selecting criteria, you also assign the different areas of the marketing center you want your attributes to appear, such as the asset library or campaign library.

Once created, attributes are applied when creating individual marketing tactics and campaigns.

What will I do in this lesson?

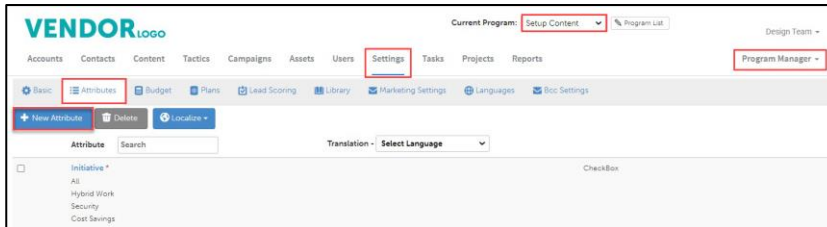
By the end of this lesson, you will be able to do the following:

- Create two multiple selection attributes
 - [Marketing Focus](#)
 - [Language](#)

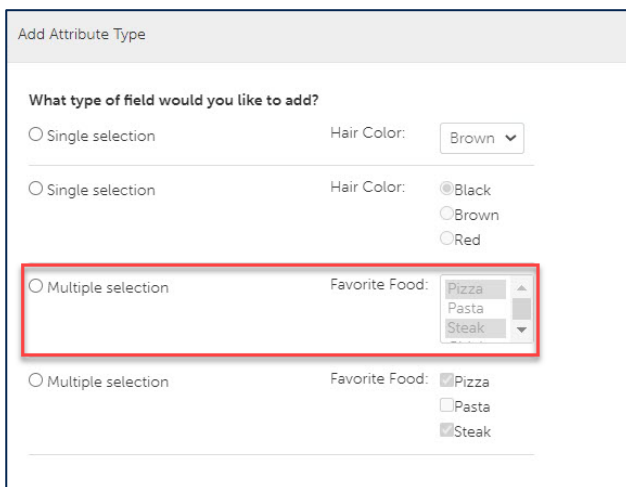
Steps

CREATE AN ATTRIBUTE – MARKETING FOCUS

- 1 In **Program Manager**, from **Current Program**, select **Setup Content**.
- 2 From the header, select **Settings > Attributes**.
- 3 Click **New Attribute**. The Add Attribute Type box opens.



- 4 Select **Multiple Selection**. A second box opens.

A screenshot of the 'Add Attribute Type' dialog box. The question 'What type of field would you like to add?' is displayed. There are four radio button options: 'Single selection', 'Single selection', 'Multiple selection', and 'Multiple selection'. The third option, 'Multiple selection', is selected and highlighted with a red box. To the right of each option is a preview of the field type. The first two 'Single selection' options show a 'Hair Color' dropdown menu with 'Brown' selected. The selected 'Multiple selection' option shows a 'Favorite Food' dropdown menu with 'Pizza', 'Pasta', and 'Steak' listed. The fourth 'Multiple selection' option shows a 'Favorite Food' checkbox group with 'Pizza', 'Pasta', and 'Steak' checked.

- 5 In the **Field Name** text field, type **Marketing Focus**.
- 6 In **This field is required**, click **No**.
- 7 From **Select where this attribute should be displayed**, select
 - **Tactic Settings** (**Note:** this will appear in the Partner Asset Library)
 - **Campaign Settings** (**Note:** this will appear in Partner Campaign Library)
 - **Product Settings** (**Note:** this will also appear in the Partner Campaign Library when the Campaign Automator feature is enabled)
- 8 From **What programs would you like to use this campaign in?**, select **Setup Content**

The screenshot shows the 'Add Attribute Type' configuration form. The 'Field Name' is 'Marketing Focus'. The 'This field is required' option is set to 'No'. The 'Select where this attribute should be displayed' section has checkboxes for 'Tactic settings', 'Library filtering', 'Campaign settings', and 'Product settings' all checked. The 'What programs would you like to use this campaign in?' section has 'Setup Content' checked.

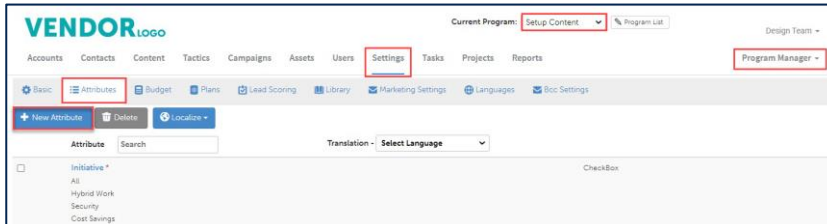
- 9 From **options**, in the **first** text box, type **Prospects**. A new text box appears
- 10 In the **second** text box, type **Existing Customers**. A new text box appears.
- 11 In the **third** text box, type **Enterprise**. A new text box appears.

The screenshot shows the 'Options' section of the form. It contains a list of three options: 'Prospects', 'Existing Customers', and 'Enterprise', each with an unchecked checkbox. There are 'Delete' and 'Sort' buttons at the top, and a 'Save' button at the bottom.

- 12 Click **Save**.

CREATE AN ATTRIBUTE – LANGUAGE

- 1 In **Program Manager**, from **Current Program**, select **Setup Content**.
- 2 From the header, select **Settings > Attributes**.
- 3 Click **New Attribute**. The Add Attribute Type box opens.

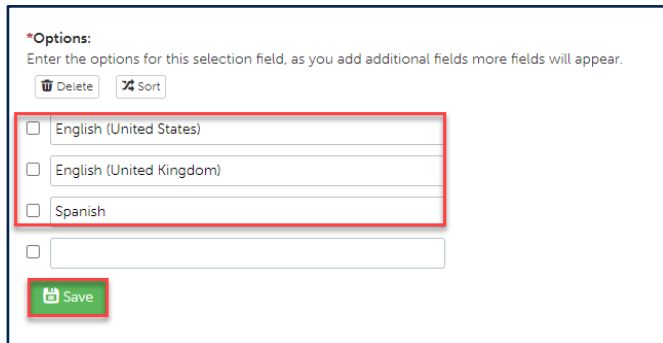


- 4 Select **Multiple Selection**. A second box opens.
- 5 In the **Field Name** text field, type **Language**.
- 6 In **This field is required**, click **Yes**.
- 7 From **Select where this attribute should be displayed**, select **Tactic Settings**. (Note: when Language is selected, the attribute is available in the asset library only).
- 8 From **What programs would you like to use this campaign in?**, select **Setup Content**.

A screenshot of the 'Add Attribute Type' form. The form has the following fields and options:

- Field Type:** Multiple selection (with a 'Change field type' button).
- Field Name:** Text field containing 'Language'.
- Field Description:** Text field.
- This field is required:** Radio buttons for 'Yes' (selected) and 'No'.
- Select where this attribute should be displayed:** A list of checkboxes:
 - Tactic settings
 - Library filtering
 - Campaign Start Marketing Filtering
 - Campaign settings
 - Campaign filtering
 - Plans:**
 - Campaign settings
 - Plan settings
 - Product settings
 - Product filtering
- What programs would you like to use this campaign in?:** A list of checkboxes:
 - CMS-Live
 - CMS-Setup
 - Partner Marketing
 - Setup Content

- 9 From **options**, in the **first** text box, type **English (United States)**. A new text box appears
- 10 In the **second** text box, type **English (United Kingdom)**. A new text box appears.
- 12 In the **third** text box, type **Spanish**.



The screenshot shows a configuration window for a selection field. At the top, it says '*Options:' and 'Enter the options for this selection field, as you add additional fields more fields will appear.' Below this are two buttons: 'Delete' and 'Sort'. There are four text input fields, each with a checkbox to its left. The first three fields contain the text 'English (United States)', 'English (United Kingdom)', and 'Spanish' respectively. These three fields and their checkboxes are enclosed in a red rectangular box. The fourth field is empty. At the bottom left of the window is a green 'Save' button with a floppy disk icon.

- 13 Click **Save**.