

How to Add an Additional Person

There are situations where you might need to add one more person to your DataMart, either a customer or maybe you have a new team member you would like to add as a stakeholder. Here's how.

1. To begin, click on the People tab located in the Target screen

CONNECT - Sales Demo

Dashboard Compose **Target** Automate Deploy Analyze

KNOWLEDGE BASE

Dashboard FTP imports Exports DataMart fields **People** Data extensions

+ Add person Export as .csv Manage test contacts

Action	Email	PostalCode	BirthMonthYear	Birthday	ProductInterest
	10000002@testacc1.com	L3A 1A2	1950-01-01 12:00:00 AM		beer
	10000004@testacc1.com	N8A 1A4	1950-10-01 12:00:00 AM		beer
	10000005@testacc1.com	N1A 1A5	1950-01-01 12:00:00 AM		spirit
	10000006@testacc1.com	K6A 1A6	1950-01-01 12:00:00 AM		mixed
	10000008@testacc1.com	M5A 1A8	1950-01-01 12:00:00 AM		spirit
	10000009@testacc1.com	N8A 1A9	1950-01-01 12:00:00 AM		mixed
	10000010@testacc1.com	P1A 1B1		1950-01-10 12:00:00 AM	beer
	10000011@testacc1.com	K9A 1B2	1950-01-01 12:00:00 AM		beer
	10000013@testacc1.com	M3A 1B4	1950-01-01 12:00:00 AM		wine
	10000014@testacc1.com	N2A 1B5	1950-01-01 12:00:00 AM		wine
	10000015@testacc1.com	P2A 1B6	1950-01-01 12:00:00 AM		beer
	10000016@testacc1.com	K7A 1B7	1950-01-01 12:00:00 AM		wine
	10000017@testacc1.com	L1A 1B8	1950-01-01 12:00:00 AM		beer
	10000018@testacc1.com	N1A 1B9	1950-01-01 12:00:00 AM		spirit
	10000019@testacc1.com	N1A 1C1	1950-01-01 12:00:00 AM		mixed
	10000021@testacc1.com	N1A 1C3	1950-01-01 12:00:00 AM		spirit

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2. Next, click on the "Add Person" button

Action	Email	PostalCode	BirthMonthYear	Birthday	ProductInterest
	10000002@testacc1.com	L3A 1A2	1950-01-01 12:00:00 AM		beer
	10000004@testacc1.com	N8A 1A4	1950-10-01 12:00:00 AM		beer
	10000005@testacc1.com	N1A 1A5	1950-01-01 12:00:00 AM		spirit
	10000006@testacc1.com	K6A 1A6	1950-01-01 12:00:00 AM		mixed
	10000008@testacc1.com	M5A 1A8	1950-01-01 12:00:00 AM		spirit
	10000009@testacc1.com	N8A 1A9	1950-01-01 12:00:00 AM		mixed
	10000010@testacc1.com	P1A 1B1		1950-01-10 12:00:00 AM	beer
	10000011@testacc1.com	K9A 1B2	1950-01-01 12:00:00 AM		beer
	10000013@testacc1.com	M3A 1B4	1950-01-01 12:00:00 AM		wine
	10000014@testacc1.com	N2A 1B5	1950-01-01 12:00:00 AM		wine
	10000015@testacc1.com	P2A 1B6	1950-01-01 12:00:00 AM		beer
	10000016@testacc1.com	K7A 1B7	1950-01-01 12:00:00 AM		wine
	10000017@testacc1.com	L1A 1B8	1950-01-01 12:00:00 AM		beer
	10000018@testacc1.com	N1A 1B9	1950-01-01 12:00:00 AM		spirit
	10000019@testacc1.com	N1A 1C1	1950-01-01 12:00:00 AM		mixed
	10000021@testacc1.com	N1A 1C3	1950-01-01 12:00:00 AM		spirit

3. Select the Subscription(s) you would like to add the record to

= required

Add to subscription(s):

Please select

4. Select the permission level of the record you are adding

Permissions to the selected
subscription(s):

 

Permission Capture Date:

  

5. OPTIONAL: Select the record type of the record you are adding

For a definition on Record Types, [click here](#).

- Record type:**
- Test account:** Records that are used for testing purposes
 - Stakeholder:** People who are involved in the development and/or approval process prior to final deployments
 - Seed:** People who are included in deployments without having their activity tracked (opens, clicks, etc.)

6. Fill out the Field Information of the Record you are Adding

Email:	<input type="text"/>	
FirstName:	<input type="text"/>	
LastName:	<input type="text"/>	
Address:	<input type="text"/>	
City:	<input type="text"/>	
Province:	<input type="text"/>	
PostalCode:	<input type="text"/>	
BirthMonthYear:	<input type="text"/>	(YYYY-MM-DD HH:MM:SS AM/PM)
Birthday:	<input type="text"/>	(YYYY-MM-DD HH:MM:SS AM/PM)
Language:	<input type="text"/>	
PreferredStore:	<input type="text"/>	▲ ▼
ProductInterest:	<input type="text"/>	
IsPremium:	<input type="text"/>	
LoyaltyNumber:	<input type="text"/>	
Age:	<input type="text"/>	▲ ▼
HasProductA:	<input type="text"/>	
HasProductB:	<input type="text"/>	
MortgageRenewalDate:	<input type="text"/>	(YYYY-MM-DD HH:MM:SS AM/PM)
AssignedAgentId:	<input type="text"/>	

Note: Only the Identifier field is mandatory in this process. It will be flagged with a green indicator.

7. Click the "Save" button, once finished

Dashboard FTP imports Exports DataMart fields **People** Data extensions

Back Save

• = required

Add to subscription(s):

Permissions to the selected subscription(s):

Permission Capture Date:

Record type:

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- Stakeholder:** People who are involved in the development and/or approval process prior to final deployments
- Seed:** People who are included in deployments without having their activity tracked (opens, clicks, etc.)

Email:

FirstName:

LastName:

Address:

City:

Province:

PostalCode:

BirthMonthYear: (YYYY-MM-DD HH:MM:SS AM/PM)

Birthday: (YYYY-MM-DD HH:MM:SS AM/PM)

Language:

PreferredStore:

ProductInterest:

IsPremium:

LoyaltyNumber:

Revision #3

Created 17 January 2020 19:51:05 by Admin

Updated 30 October 2023 19:23:03 by Matthew Monteiro