Channel User Guide

Channel Actions

Add Channel

To start this action, click the Add Channel button above the Channel listing.

Creates a new Channel.

When this action starts a form is displayed to enter the details of the Channel.

Each field customises or controls some aspect of the Channel display or behaviour.

Some fields are required and must be entered before the Channel can be added, the required fields are Channel Name, Consent Type, Label.

Although some fields are not required, it is best practice to populate these, including .

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Channel you need to work on, and click the View button in the ⋮ More Menu on that row.

Display the selected Channel.

This action displays the Channel similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Channel you need to work on, and click the button on that row.

Edits an existing Channel.

When this action starts a form is displayed with the existing Channel and any previous information entered.

Each field customises or controls some aspect of the Channel display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Copy

To start this action, select the Channel you need to work on, and click the Copy button in the ⋮ More Menu on that row.

Copies an existing Channel.

The selected Channel is copied and the word (Copy) will be added to the name of the new Copy

Delete

To start this action, either select the Channel to work on and click the button on that row. Or CTRL+click to select multiple Channels and click the button above the Channel listing.

Deletes an existing Channel.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Channel.

Search

To start this action, click the button above the Channel listing.

Allows a Search of Channels.

This allows a simple text search across all Channels.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the Adv. Search button above the Channel listing in the More Menu.

Allows an Advanced Search of Channels.

The Advanced Search opens a new section at the bottom of the Channels and allows several distinct features:

- Multiple Search Lines : allows Channel matches to be identified where more than one search criteria is required
- Nested Searches : allows a combination of AND and OR logic to find results
- Saved Filters : allows a search to be saved as a Filter
- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the Refresh button above the Channel listing in the More Menu.

Refresh the list of Channels.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the Export to List button above the Channel listing in the More Menu.

Export the Channel results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Channels shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Channels will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the Export All button above the Channel listing in the More Menu.

Export all the Channels to a List.

Exactly as for "Export to List" except rather than just Exporting the Channel results shown, all Channels will be expored.

Export Item

To start this action, select the Channel you need to work on, and click the Export Item button in the More Menu on that row.

Export only the selected Channel to a List.

Exactly as for "Export to List" except rather than just Exporting the Channel results shown, only the selected Channel is exported.

Choose Columns

To start this action, click the Choose Columns button above the Channel listing in the More Menu.

Changes the Columns shown in the Channel Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Channel Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Channel Listing.

Manage Filters

To start this action, click the Manage Filters button above the Channel listing in the More Menu.

Creates custom Filters for Channels.

A Filter is a saved Advanced Search. Multiple Filters can be created for Channels.

These Filters appear at the top of the Channel listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Channels where these can be managed.

Channel Field Reference

Channel Name

This field is mandatory.

Internal name for this channel

Consent Type

This field is mandatory.

The user's current state of consent for the marketing channel

Label

This field is mandatory.

The label to display alongside the channel when displayed to a user

Description

The detailed description of what this channel is for. This should state exactly what the user will be consenting to

Consent Type

The type of consent that this channel will request from the user.

- 'Opt-In' - When the channel's checkbox is checked, it will be treated as the user opting IN
- 'Opt-Out' - When the channel's checkbox is checked, it will be treated as the user opting OUT
- 'Implied' - No checkbox is shown to the user, only the channel's description, but upon submitting the form with this channel displayed on it, it shall treat that as implied consent

Default Consent State

Override the default consent state for this channel for new, existing and implied.

Any visitor who has not offered any consent will have this consent assumed.

Any forms will have this consent pre-selected when Marketing Consent Settings | Pre-tick Current Preferences is enabled, and the system will behave as if this consent has been given.

Defaults to Marketing Consent Settings | Existing / New User / Implied State Consent

Checked By Default

Whether or not this marketing channel, when displayed to the user, should be automatically checked.

When checked, this should go with a message along the lines of 'Untick to opt out of marketing messages'

This applies when Marketing Consent Settings | Pre-tick Current Preferences is disabled