

# Trait Management

*This sections allows you to create Create Trait Types and Traits to assign to Customers.  
A Trait Type is something like Hair Colour and will have values of Brown etc.  
A Trait contains one or more Trait Type Values, it should define a section of your Customers.*

## 1. View all Trait Types

When clicking the Trait Management link in the Administration sub menu in the left hand navigation you will be shown the Trait Types for the currently selected Account. There is also an option to change this view to show the Global Trait Types. The name, description and values for each Trait Type are displayed.

**Note:**

If the Global Trait Types have been displayed the ability to view Global Trait Types will also be disabled.

## 2. Create a Global Trait Type

When creating a Trait Type you must specify a name e.g. Hair Colour and an optional Description. Once the Trait Type is created you can add Values for it using the Edit Trait Type Screen (See below).

**Note:**

This Trait Type will be accessible by all accounts and can be used to segment Customers in those accounts.

**Note:**

If you do not desired Global Trait Types they can be disabled during set up of your application.

## 3. Create an Account Trait Type

When creating a Trait Type you must specify a name e.g. Hair Colour and an optional Description. Once the Trait Type is created you can add Values for it using the Edit Trait

Type Screen (See below).

**Note:**

This Trait Type will only be accessible to the currently selected Account and Customers within that Account.

#### **4. View a Trait Type**

A Trait Type can be viewed from the View all Trait Types screen by clicking the "View" link in the Operations column.

#### **5. Edit a Trait Type**

A Trait Type can be edited from the View all Trait Types screen by clicking the "Edit" link in the Operations column or from the left hand menu when Viewing a Trait Type. The Edit screen displays a Input box which allows you to add a value and a list of all the Values which can be deleted.

#### **6. Delete a Trait Type**

A Trait Type can be deleted from the View all Trait Types screen by clicking the "Delete" link in the Operations column or from the left hand menu when Viewing a Trait Type.

#### **7. View all Traits**

When clicking the Trait Management link in the Administration sub menu in the left hand navigation you will be shown the Trait Types for the currently selected Account. There is also an option to change this view to show the Global Trait Types. This screen displays the name, description and Trait Type Values for each Trait.

**Note:**

If the Global Traits have been displayed the ability to view Global Traits will also be disabled.

#### **8. Create a Global Trait**

When creating a Trait you must specify a name e.g. Punks and an optional Description. Once the Trait is created you can add Trait Type Values to it using the Edit Trait Screen (See below).

**Note:**

This Trait will be accessible by all accounts and can be used to segment Customers in those accounts.

## Trait Management

**Note:**

If you do not desired Global Traits they can be disabled during set up of your application.

### 9. Create an Account Trait

When creating a Trait you must specify a name e.g. Punks and an optional Description. Once the Trait is created you can add Trait Type Values to it using the Edit Trait Screen (See below).

**Note:**

This Trait will only be accessible to the currently selected Account and Customers within that Account.

### 10. View a Trait

A Trait can be viewed from the View all Traits screen by clicking the "View" link in the Operations column.

### 11. Edit a Trait

A Trait can be edited from the View all Traits screen by clicking the "Edit" link in the Operations column or from the left hand menu when Viewing a Trait. The Edit screen displays a select list of all the Trait Types, when you select the Trait Type its values are populated which you may then select.

**Note:**

You can only add a single value from each Trait Type.

### 12. Delete a Trait

A Trait can be deleted from the View all Traits screen by clicking the "Delete" link in the Operations column or from the left hand menu when Viewing a Trait.