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## Record Lookup

From the Record Lookup screen, you can access detailed information about a record, including a log of all changes made to the record, the history of all activities associated with this record, and any joins between this record and a record in another table.

### 1. Find a record in the database

The Record Lookup screen provides a simple database query tool.

1. From the System Tray, select **Data Management > Management > Record Lookup**.
2. From the Table drop-down menu, select the table you want to query.
3. From the Find drop-down, select the field you want to query.
4. Select the operator to be used to find the record.
5. Enter the value for which you want to search.

Table: Recipient ▼ Add New Record ⊕

Find: Email Address ▼ contains ▼ cheetah Search

6. Click **Search**. The system displays a list of records (up to a maximum of 250) that meet your search criteria.

**Hint:** The fields that are displayed in the search results may not represent all of the fields in the selected table. From the Tables screen, you can optionally enable or disable fields from being displayed on the Record Lookup screen, as well as determine the sequence in which the fields are shown.

### 2. View a record

The Record Lookup screen allows you to view the details of a record.

1. From the search results, click the "Edit" link the Actions column.
2. The Database Record screen displays several tabs which provide access to different information.

Save

Record Details Record Joins Preferences Campaign History Update History Social & Web Activities View All

Record Details	Displays the value for every field in this record.
Record Joins	Displays information about table joins, including records that join to the current record, and records in other tables to which the current record is joined.
Preferences	Displays opt-in / opt-out status values for all Sender Profiles and Preference fields.
Campaign History	Displays all of the Campaigns in which the selected record was included as part of the Campaign Audience (see below for more details on this tab).
Update History	Displays a list of all the actions (such as imports, form submissions, or manual updates) that have modified this record.
Social & Web Activities	Displays a list of all the social and web-related activities (such as opens, clicks, likes, etc.) associated with this record, as well as the Campaign that triggered that activity.
View All	Combines the information from the previous three tabs into a single view.

### 3. Edit a record

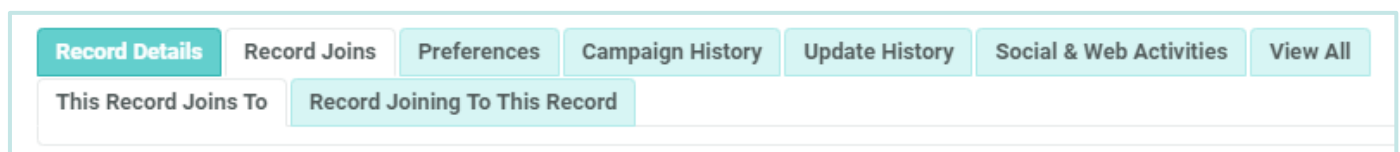
The Record Lookup screen allows you to edit a record.

1. Search for the desired record as described above.
2. Click the "Edit" link within the search results. The **Record Details** tab is selected by default. This screen displays the value for every field in this record.
3. Make any necessary changes to the values for this record.
4. Click **Save**.

### 4. Access information in a joined table

The Record Lookup screen allows you to view records in joined tables. For example, you could view all the Orders on a joined Order table that are associated with a customer on the Recipient table.

1. Search for the desired record as described above.
2. Click the "Edit" link within the search results.
3. Click the **Record Joins** tab.
4. Select a tab for the join direction, either **This Record Joins To** or **Records Joining to this Record**.



5. The system displays a list of all the joins. Click on a join to expand it to see information about the joined record (or records).
6. To see more details about a joined record, click the "Edit" link next to a joined record; the system opens a new Database Record tab within the Top Navigation Panel.

## 5. Create a new record

In addition to being a query tool, the Record Lookup screen can serve as a simple data entry screen for entering new records.

1. From the Table drop-down menu, select the table in which you want to create the new record.
2. Click **Add New Record**.

The screenshot shows the Record Lookup interface. At the top, there is a 'Table' dropdown menu with 'Table: Recipient' selected. To the right of this dropdown is a red circle highlighting the 'Add New Record' button with a plus sign icon. Below the table dropdown is a 'Find' dropdown menu with 'Email Address' selected. To the right of this is an 'equal to' dropdown menu. Further right is a text input field with the placeholder text 'Enter Record Search Phrase' and a 'Search' button.

3. Within the **Record Details** tab, enter or select values for the new record.
4. Click **Save**.

## 6. View Campaign history

The **Campaign History** tab displays all of the Campaigns in which the selected record was included as part of the Campaign Audience.

**Note:** The Campaign History tab is typically relevant only for tables that contain consumer information, such as a "Customer" table.

1. Optionally, to apply a date filter to the list of Campaigns, enter the Start Date and End Date for the desired date range. Click **Refresh History**. The screen is refreshed to show only the Campaigns that were launched within that date range.
2. Click the Campaign Name. The Campaign Record Details pop-up window is displayed. This window displays all the activity for this record, that's associated to this Campaign, including activity prior to the Campaign (such as imports or manual updates) and after the Campaign (such as opens or clicks).
3. Optionally, to view the content of the Campaign message, click the "View Message" link. The system displays the message content in a separate browser window. Please note the following restrictions with the "View Message" feature:
  - Campaigns triggered via the Advanced Event Trigger or Email Campaign Trigger APIs are not supported.
  - For Date-triggered and Event-triggered Campaigns, only the most recently-deployed message to this consumer is available; previous messages are not available. If you need to archive a copy of every message sent from Messaging, the optional Cheetah Message Archive product provides this functionality.

## Version History

Version	Date	Description	Reviewed / Approved by
1.0	November 2019	Initial release	Cheetah Digital Product Management
1.1	June 2021	Minor updates	Cheetah Digital Product Management
1.2	December 2021	Review, added version history	Cheetah Digital Product Management