



## Profile Builder

### Using a New or Saved Customer File

#### OVERVIEW

Using Profile Builder, you can create a custom profile using your own enhanced customer address file. This customer file will then be automatically summarized against a base geography to create a profile.

#### LOCATE PROFILE BUILDER

1. From the homepage, click on Consumer Targeting.



2. Select Profile Builder.
3. Select where your profile data will be coming from. The options are:

PROFILE DATA TYPES	
PROFILE DATA TYPE	DESCRIPTION
Upload a new customer file	Upload a customer address file.
From a saved customer file	Select a previously uploaded customer address file.
Upload a segment summary file	Upload a previously created profile.

## SELECT A CUSTOMER ADDRESS FILE

### If you selected to upload a new customer file:

1. Click the Choose a file button. Navigate to and select the file that you want to upload.

Note: To facilitate the file processing, please make sure your address file is as cleaned up as possible and only contains U.S. addresses.

Import Data from customer file

Choose a file

No file chosen

2. When the preview of the file appears, select the appropriate column header for each column in the file.

(Optional) If the file contains consumption data, identify that column as Usage/Consumption.

Address	City	State	ZIP Code	Usage/Consumption
Address	City	State	Zip Code	Sales
1383 Airport Dr	S Burlington	VT	5403	1447
335 South Cobb Street	Palmer	AK	99645	1078
132 Honor Way	Madison	AL	35758	789
96 Barney rd.	Enola	AR	72047	528

3. Select one of the following methods for fixing non-exact matches:

NON-EXACT MATCHES METHODS	
METHOD	DESCRIPTION
Best Estimate	The system determines the best match for each address entered and appends the information.
All Possibilities	If an exact match cannot be found, all possible matches are considered.
Reject	Non-exact matches are not appended with geographic and segmentation codes; however, the locations remain in the list but are not used for subsequent reporting and calculations.

## If you chose to select a saved customer file:

1. Select a previously uploaded customer file.

Import data from saved customer file

Address List-Copy

Address List-Copy

Do Not Import	Do Not Import	Address	State	Do Not Import	Do Not Import	
id_69	u_name_4	u_address_14	u_city_72	u_state_72	u_zip_69	u_sale

2. Identify the following columns using the column header options. Leave all other columns as Do Not Import.

ZIP Code	Do Not Import	Do Not Import	Do Not Import	Do Not Import	Do Not Import	PRIZM Premier	
zip_gcode	zp4_gcode	zp6_gcode	sta_gcode	cty_gcode	csa_gcode	pzp_zp6_seg_id_4	

- a. The column containing the standard geography level you want to use for summarizing your address file (for example, ZIP Code or County).
- b. The column containing the segmentation codes.
- c. (Optional) The column containing consumption data.

## SET PROFILE DETAILS

1. Select a segmentation system to use for building your profile.

Select a segmentation system to build your profiles.

PRIZM Premier ☒ P\$YCLE Premier ☐ ConneXions ☐ ConneXions Premier ☐

2. Select the geographic level that you want to use to summarize customer counts.  
For example, if you choose ZIP Code, the geosummary will be created using the ZIP Code geographic level.

Select a level to summarize to.

National ☒ Census Block Group ☐ Census Tract ☐ Nielsen Designated Market Area DMA ☐

State ☐ Three-Digit ZIP Code ☐ ZIP Code ☐ County ☐

3. Select a profile base. The options are:

PROFILE BASE TYPES	
PROFILE BASE TYPE	DESCRIPTION
Universe of file	Uses your customer address file to determine which geographies are included in the profile base.
Select an analysis area	Select a previously created analysis area to use as your profile base.
Create a new analysis area	Create a new analysis area to use as your base.

**If you select universe of file as the profile base:**

No additional information regarding the base is needed at this point.

**If you select an analysis area as the profile base:**

a. Select a previously created an analysis area.

Select a profile base

Universe of file ☐ Select an analysis area ☒ Create a new analysis area ☐

> Address\_ListCopy  
Dane County (55025)  
Madison ZIP Code

Select a method of inclusion

Centroid inclusion ☐ Entirely within ☐ Within or touches ☐

b. Specify the method by which you want to include the geographies contained in the selected area. The options are:

INCLUSION METHODS	
INCLUSION METHOD	DESCRIPTION
Centroid inclusion	Includes geographies with centroids that fall within the perimeter of the area.
Entirely within	Includes geographies that fall completely within the perimeter of the area.
Within or touches	Includes geographies that fall within or touch any part of the perimeter of the area.

**If you create an analysis area as the profile base:**

- a. Select the standard geography(ies) you want to use for the area you're creating.

Select a standard geography.

Search

Clear

> My Analysis Area

> United States (USA)

> State (STA)

> Combined Statistical Area (CSA)

> Nielsen Designated Market Area (DMA)

> Three-Digit ZIP Code (TDZ)

> Core Based Statistical Area (CBS)

> County (CTY)

> Census Place (PLA)

> ZIP Code (ZIP)

Use geographies within the selected area

OFF

Edit the display style of the analysis area.

OFF

Preview of your analysis area

+

-

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-105.264700, 5.661898

esri

- b. (Optional) To create your analysis area based on standard geographies that fall within your selected area, change the Use geographies within the selected area prompt to ON. Additional options will appear.

Use geographies within the selected area

ON

Select a Geography Level:

Select a method of inclusion?

Centroid Inclusion

Entirely within

Within or touches

Show interior boundary?

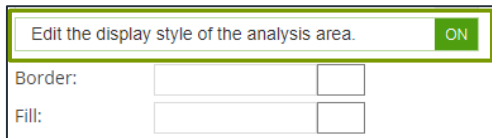
ON

- o Specify the method by which you want to include the geographies contained in your selected area. The options are:

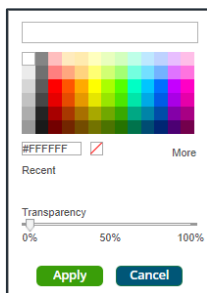
INCLUSION METHODS	
INCLUSION METHOD	DESCRIPTION
Centroid inclusion	Includes geographies with centroids that fall within the perimeter of the area.
Entirely within	Includes geographies that fall completely within the perimeter of the area.

- o By default, the interior boundaries will be shown on the map. To hide the boundaries, change the Show interior boundaries prompt to OFF.

- c. (Optional) To define how you want the analysis areas to display on the map, change the Edit the display style of the analysis area prompt to ON. Additional options will appear.



- To customize the analysis area border settings, click the button next to Border. When the Border setting options box appears, click to select your desired border color; click and drag the slider to specify the transparency of the border; and then click Apply.
- Note: A transparency of 100% means that there will be no color. 0% means full color.
- To customize the analysis area fill settings, click the button next to Fill. When the Fill setting options box appears, click to select your desired border color; click and drag the slider to specify the transparency of your analysis area display; and then click Apply.



- d. Enter a name for your analysis area. Click Submit Job to create the area.

Note: The profile name can be up to a maximum of 80 characters.

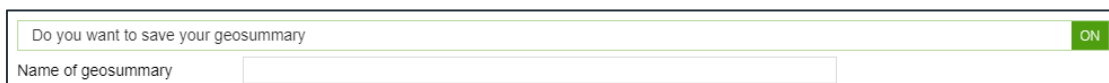


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## NAME GEOSUMMARY AND PROFILE

1. By default, your geosummary will be saved. You can disable this option by changing Do you want to save your geosummary to OFF.

If you are saving your geosummary, provide a name for the file.



2. Name your profile. You also have the option to provide a profile description.



3. (Optional) If you selected Universe of file as your profile base, you'll need to Select the percent to trim. This will determine the percentage of records you want the system to remove from the original file when creating the base market. The default value is 20%, which means that the system will automatically include only geographies containing the top 80% of customer counts.

Note: If you don't want any records trimmed, type 0 instead of leaving the field blank.

Select the percent to trim	<input type="text" value="20"/>	<input type="button" value="X"/>
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4. Click Create Profile.
5. When the job has been submitted, you can view the profile generation status on the My Jobs screen. The generated profiles are also saved to your My Content.

When creating a profile report, your custom profiles will be located in the My Profile folder.