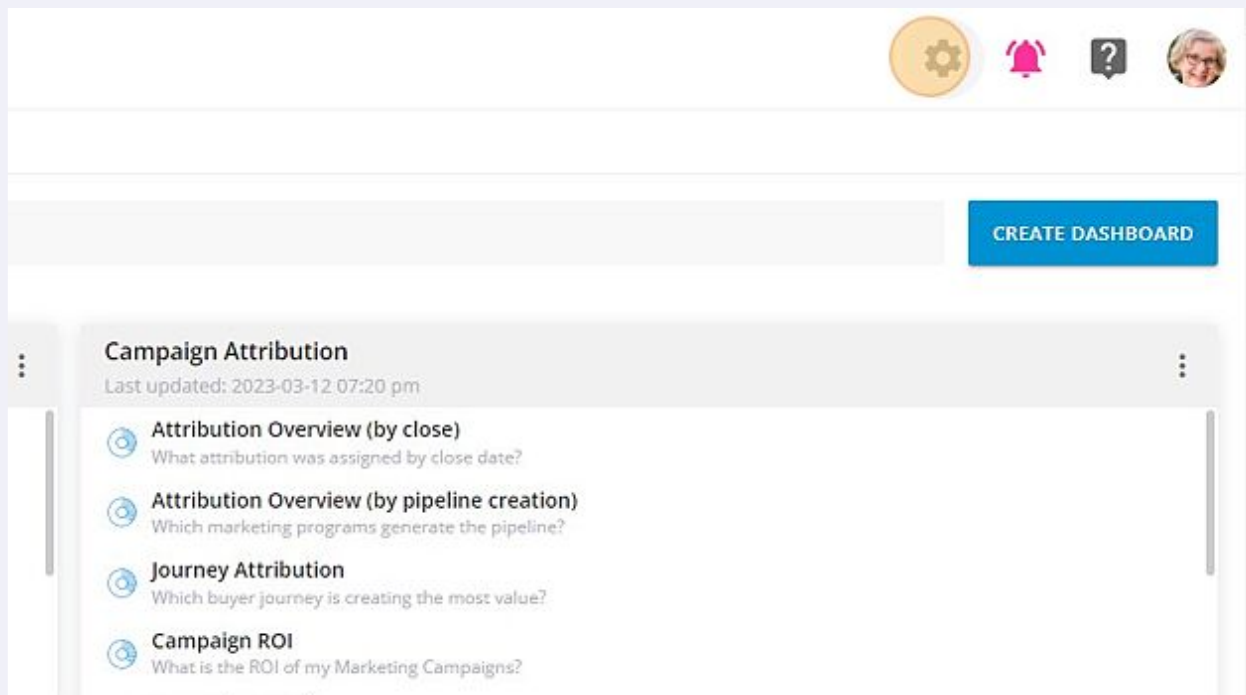


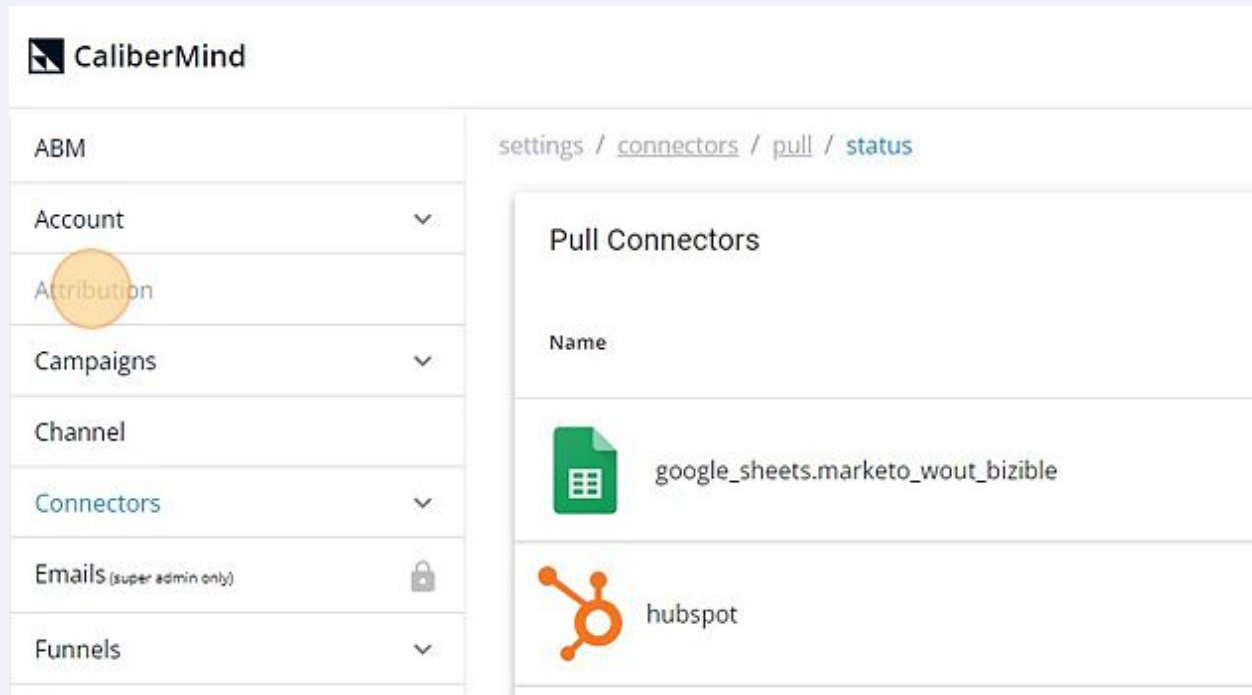
# How to Configure a Custom Attribution Model in Calibermind

1 Navigate to [my.calibermind.com/analytics/dashboards](https://my.calibermind.com/analytics/dashboards)

2 Log into the application and click the cog icon to navigate to the Admin area. Click the Settings Cog on the top right of the screen.



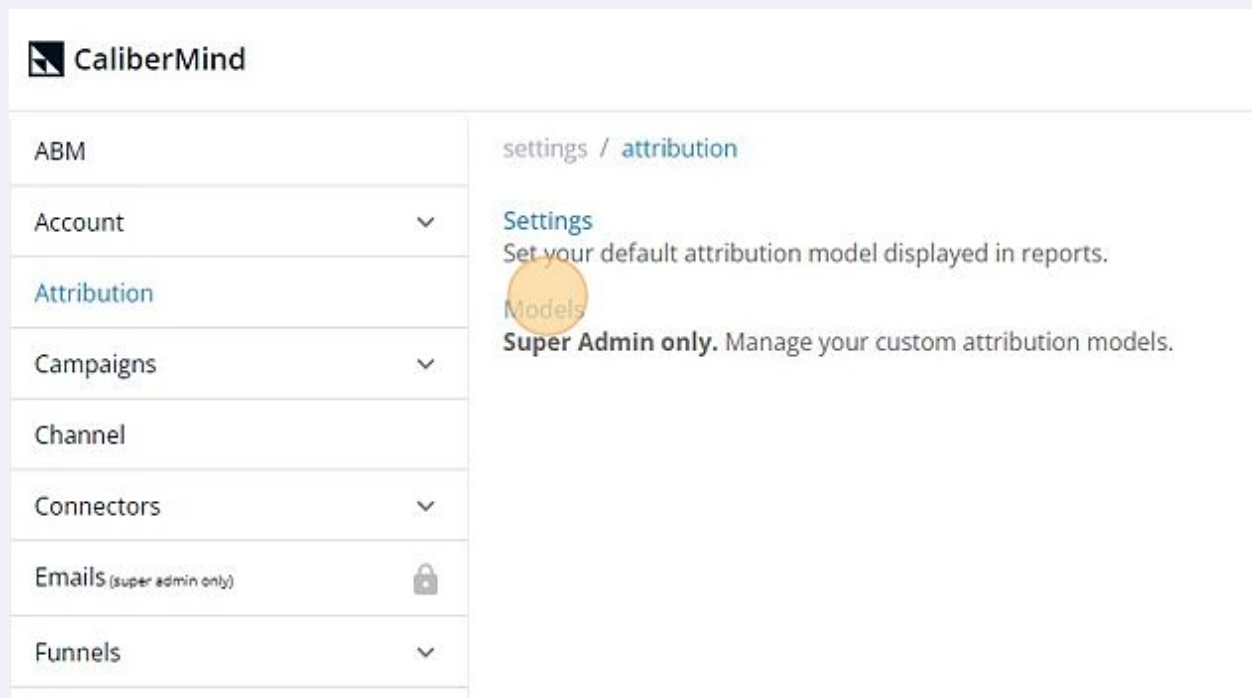
3 Click the "Attribution" link on the left menu rail.



The screenshot shows the CaliberMind interface. On the left is a navigation menu with items: ABM, Account, Attribution (highlighted with a yellow circle), Campaigns, Channel, Connectors, Emails (super admin only), and Funnels. The main content area shows a breadcrumb trail: settings / connectors / pull / status. Below this is a section titled "Pull Connectors" with a "Name" header. Two connectors are listed: "google\_sheets.marketo\_wout\_bizible" with a Google Sheets icon, and "hubspot" with the HubSpot logo.

! Select the Models area, the settings area is used to indicate which Attribution model is currently your default for reporting

4 Click the "Models" link in the main screen.



CaliberMind

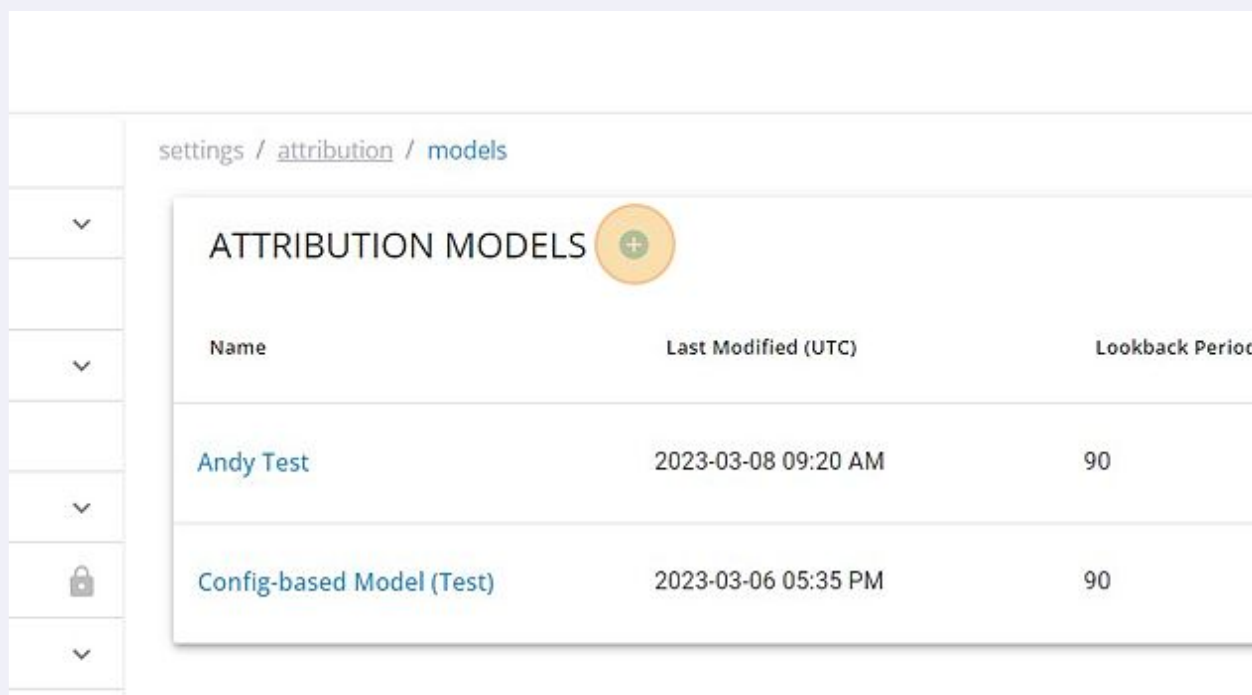
settings / attribution

- ABM
- Account
- Attribution
- Campaigns
- Channel
- Connectors
- Emails (super admin only)
- Funnels

**Settings**  
Set your default attribution model displayed in reports.

**Models**  
**Super Admin only.** Manage your custom attribution models.

5 Click the "blue plus" icon to begin a new model.



settings / attribution / models

### ATTRIBUTION MODELS

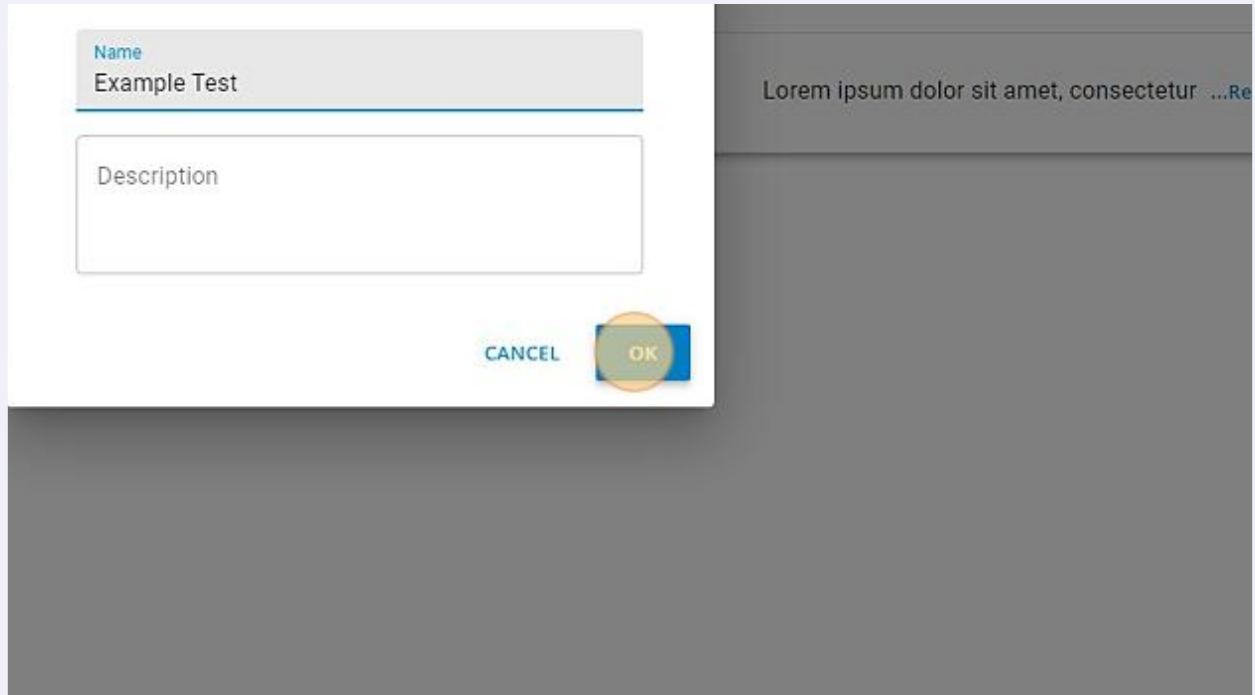
| Name                                      | Last Modified (UTC) | Lookback Period |
|---|---------------------|-----------------|
| <a href="#">Andy Test</a>                 | 2023-03-08 09:20 AM | 90              |
| <a href="#">Config-based Model (Test)</a> | 2023-03-06 05:35 PM | 90              |

6

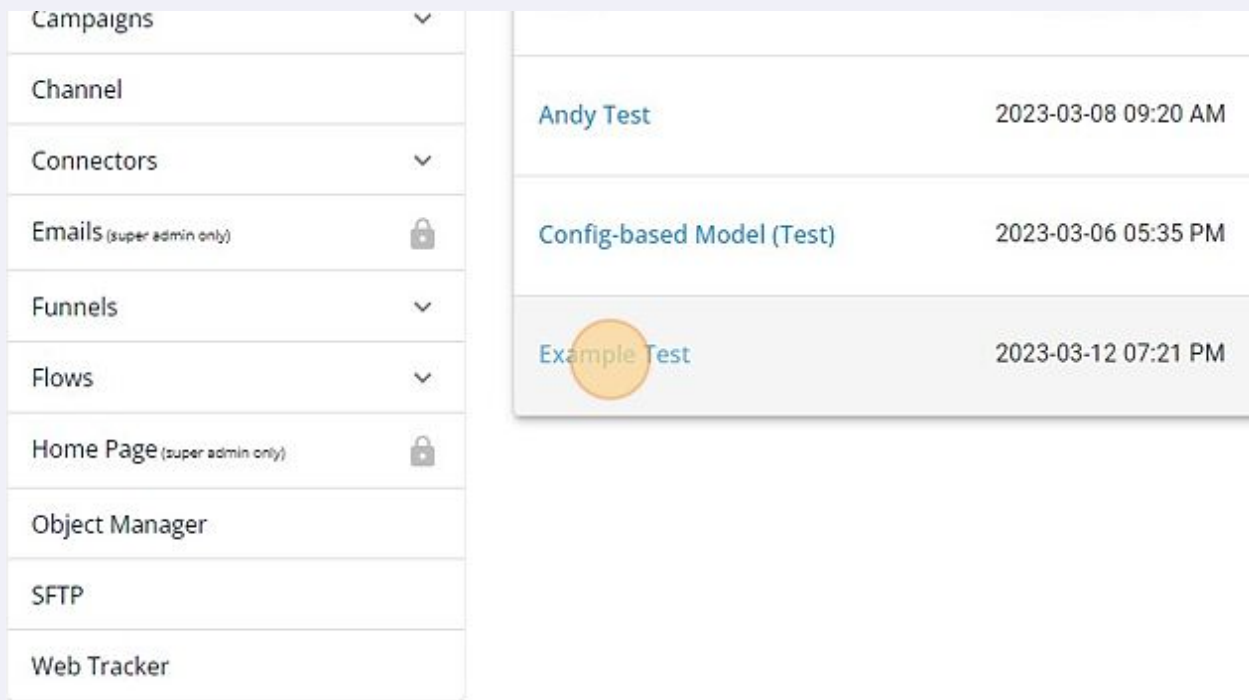
Type the desired name and description of your model in this example we used "Example Test" and click the blue "OK" button

7

Click the blue "OK" button on the button right of the dialog box.



8 Click "Example Test" to begin customizing the model.

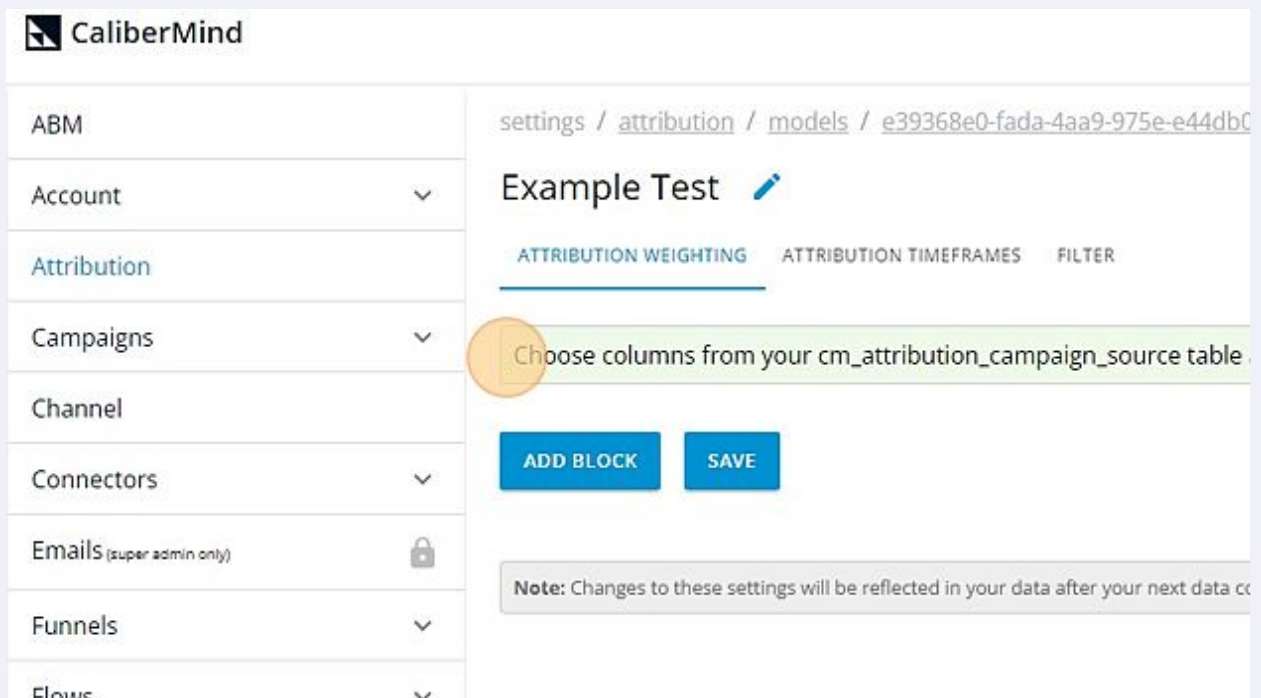


The screenshot shows a navigation menu on the left with items: Campaigns, Channel, Connectors, Emails (super admin only), Funnels, Flows, Home Page (super admin only), Object Manager, SFTP, and Web Tracker. On the right, a list of models is displayed:

| Model Name                | Last Modified       |
|---------------------------|---------------------|
| Andy Test                 | 2023-03-08 09:20 AM |
| Config-based Model (Test) | 2023-03-06 05:35 PM |
| Example Test              | 2023-03-12 07:21 PM |

The "Example Test" model is highlighted with a yellow circle.

9 NOTICE the green message which states: "Choose columns from your cm\_attribution\_campaign\_source table and weight your logic accordingly."



The screenshot shows the CaliberMind interface for the "Example Test" model. The breadcrumb trail is: settings / attribution / models / e39368e0-fada-4aa9-975e-e44db0. The page title is "Example Test" with an edit icon. There are three tabs: "ATTRIBUTION WEIGHTING" (selected), "ATTRIBUTION TIMEFRAMES", and "FILTER". A green message box states: "Choose columns from your cm\_attribution\_campaign\_source table and weight your logic accordingly." Below this are "ADD BLOCK" and "SAVE" buttons. A note at the bottom says: "Note: Changes to these settings will be reflected in your data after your next data cc".



You can add logic to weight different data points by selecting the "Add Block" button

**10** Click the blue "ADD BLOCK" button.

Settings / attribution / models / 232300e0-1d0d-4dd7-973e-e4400d

## Example Test

ATTRIBUTION WEIGHTING | ATTRIBUTION TIMEFRAMES | FILTER

Choose columns from your cm\_attribution\_campaign\_source table

**ADD BLOCK** **SAVE**

**Note:** Changes to these settings will be reflected in your data after your next data cc

- ABM
- Account
- Attribution
- Campaigns
- Channel
- Connectors
- Emails (super admin only)
- Funnels
- Flows
- Home Page (super admin only)

**11** Click the blue "ADD RULE" button.

Attribution

Campaigns

Channel

Connectors

Emails (super admin only)

Funnels

Flows

Home Page (super admin only)

Object Manager

SFTP

ATTRIBUTION WEIGHTING ATTRIBUTION TIMEFRAMES FILTER

Choose columns from your cm\_attribution\_campaign\_source table ar

If...

ADD RULE REMOVE BLOCK

ADD BLOCK ADD OTHERWISE SAVE

**12** Begin developing your rules by clicking the "Select.." drop down list.

Attribution

Campaigns

Channel

Connectors

Emails (super admin only)

Funnels

Flows

Home Page (super admin only)

Object Manager

SFTP

ATTRIBUTION WEIGHTING ATTRIBUTION TIMEFRAMES FILTER

Choose columns from your cm\_attribution\_campaign\_source table ar

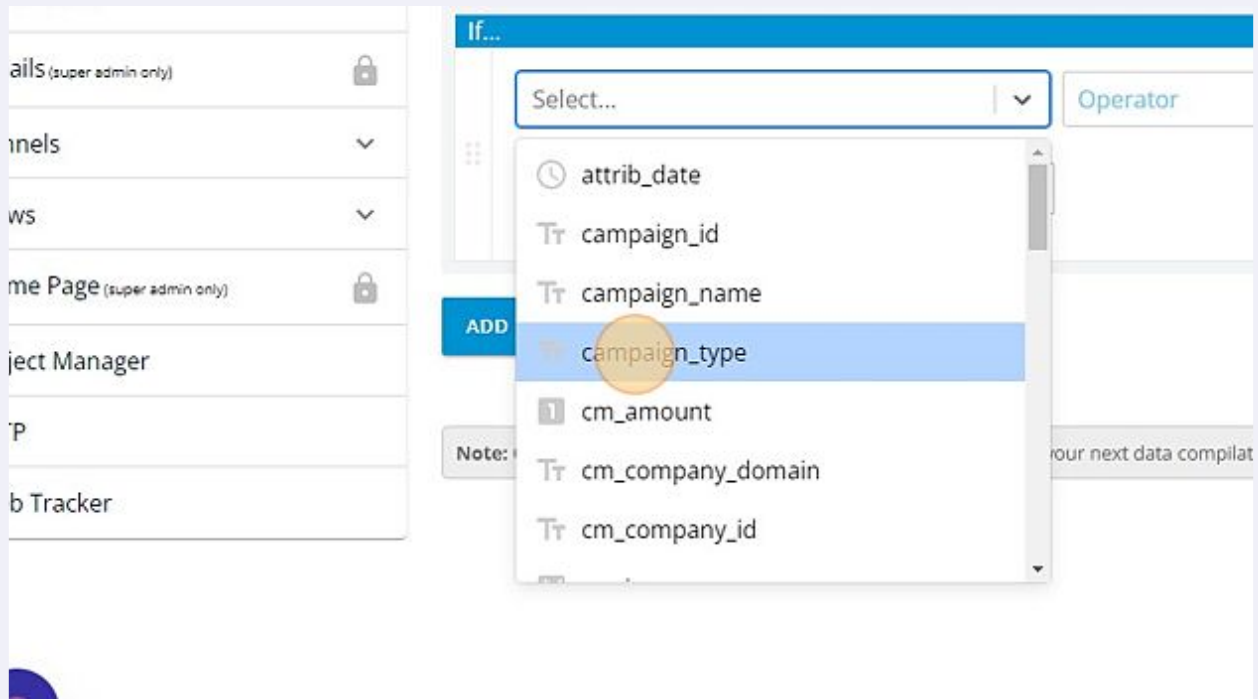
If...

Select... Operator

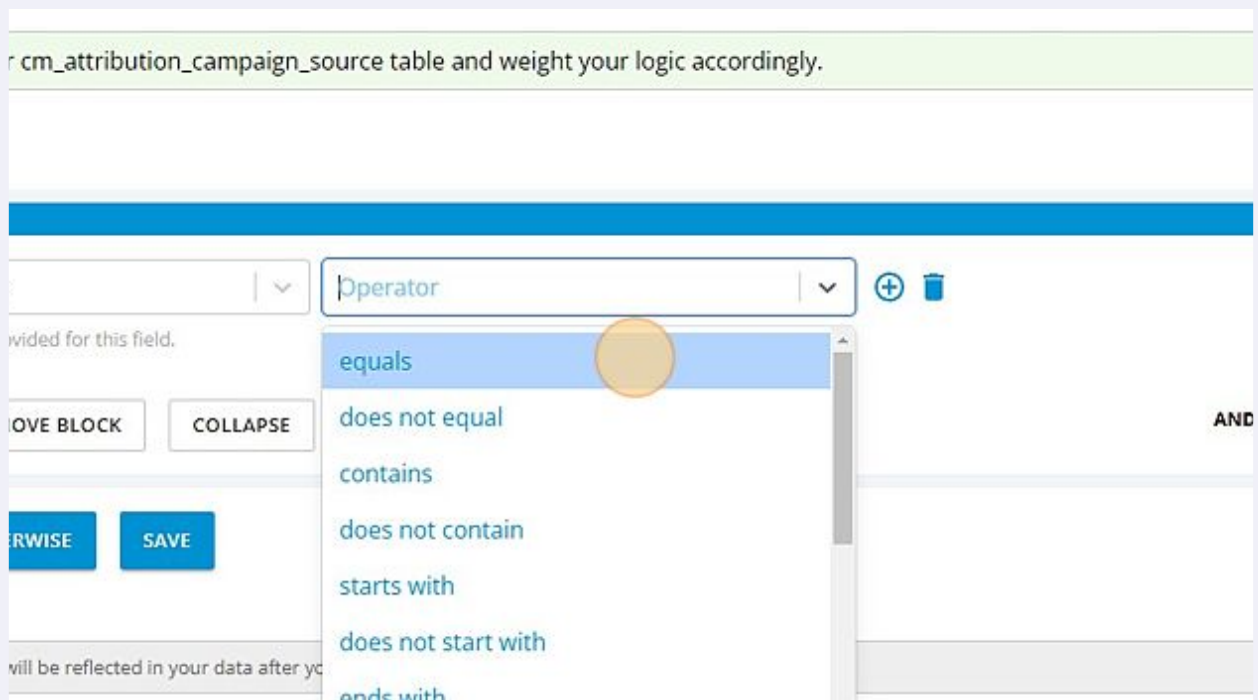
ADD RULE REMOVE BLOCK COLLAPSE

ADD BLOCK ADD OTHERWISE SAVE

13 Select the desired field for the rule.

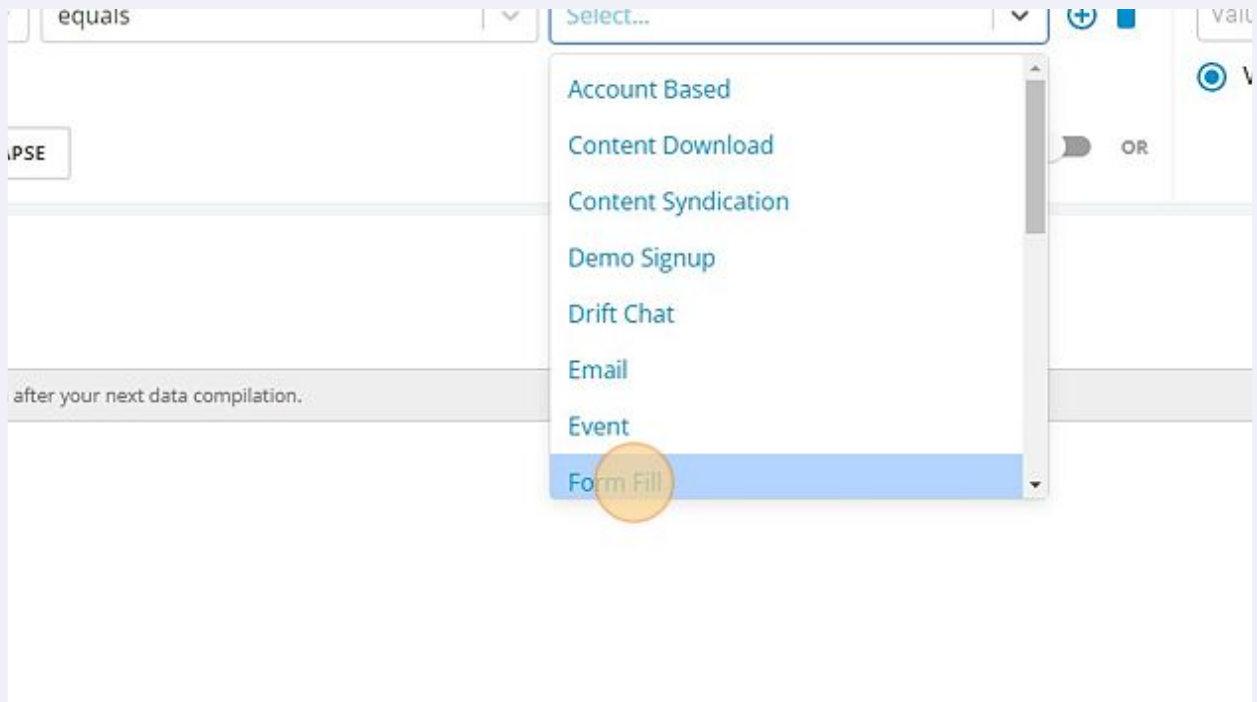


14 Click "equals" as the desired operator for this example.





15 Click "Form Fill"



Users may want to weight certain campaign types more heavily due to having spent more money on these actions

**16** Click the "Value" field.

ngly.

EXPAND COLLAPSE

Then...

Form Fill

The first 300 values are displayed.

Value

AND  OR

**17** Type "2"

Continue adding additional rules to the custom attribution model.

18 Click "ADD RULE"

Channel

Connectors

Emails (super admin only)

Funnels

Flows

Home Page (super admin only)

Object Manager

SFTP

Web Tracker

If...

campaign\_type equals

No definition has been provided for this field.

ADD RULE REMOVE BLOCK COLLAPSE

ADD BLOCK ADD OTHERWISE SAVE

Note: Changes to these settings will be reflected in your data after your next data compilation

19 Click here.

campaign\_type equals

No definition has been provided for this field.

AND

Select... Operator

attrib\_date

campaign\_id

campaign\_name

campaign\_type

cm\_amount

cm\_company\_domain

cm\_company\_id

Note: Changes to these settings will be reflected in your data after your next data compilation

20

NOTE: To change "AND" to "OR" you will need to select the Boolean Operator slider as seen in the next step.

The screenshot shows a configuration interface. On the left is a sidebar menu with the following items: Channel, Connectors (with a dropdown arrow), Emails (super admin only) (with a lock icon), Funnels (with a dropdown arrow), Flows (with a dropdown arrow), Home Page (super admin only) (with a lock icon), Object Manager, SFTP, and Web Tracker. The main area displays a rule configuration panel titled "If...". The first rule is "campaign\_type" with the operator "equals". Below it, a message states "No definition has been provided for this field." A second rule is partially visible, starting with "Select..." and an "Operator" field. At the bottom of the rule configuration area are three buttons: "ADD RULE", "REMOVE BLOCK", and "COLLAPSE". Below the entire configuration area are three large blue buttons: "ADD BLOCK", "ADD OTHERWISE", and "SAVE".

21

Click the "AND/OR" field.

The screenshot shows a configuration interface. At the top, there is a dropdown menu with "Form Fill" selected, followed by a plus icon and a trash icon. Below this, a text label reads "The first 300 values are displayed." To the right, there is a numeric input field containing the number "2" and three radio button options: "Value" (which is selected), "Column", and "Set to Null". Below these elements is a Boolean operator slider with "AND" on the left and "OR" on the right, with a yellow circular slider knob positioned between them.

22 Click here.

The screenshot shows a configuration interface for a form field. At the top, there is a blue header bar. Below it, a dropdown menu is set to 'campaign\_type', followed by an operator dropdown set to 'equals', and a 'Form Fill' button. A note below the first dropdown reads 'Definition has been provided for this field.' and another note to the right says 'The first 300 values are displayed.' Below this, a second dropdown menu is also set to 'campaign\_type', and the operator dropdown is open, showing a list of options: 'equals', 'does not equal', 'contains', 'does not contain', and 'starts with'. A yellow circle highlights the 'Operator' dropdown menu. To the left of the operator dropdown are buttons for 'RULE', 'REMOVE BLOCK', and 'COLLAPSE'. At the bottom left, there are buttons for 'ADD OTHERWISE' and 'SAVE'.

23 Click "equals"

This screenshot is identical to the one above, but the 'equals' option in the operator dropdown menu is now highlighted in blue, indicating it has been selected. The yellow circle still highlights the dropdown menu.

24 Click here.

The screenshot shows a configuration interface for a data tool. It features two rows of configuration options. The top row has a dropdown menu on the left, a 'Form Fill' dropdown in the center, and a 'Then...' section on the right containing a text input with the number '2' and radio buttons for 'Value' and 'Content'. Below the 'Form Fill' dropdown is the text 'The first 300 values are displayed.' The bottom row has a dropdown menu on the left, a 'Select...' dropdown in the center, and another 'Then...' section on the right. Below the 'Select...' dropdown is the text 'The first 300 values are displayed.' At the bottom right, there is a toggle switch labeled 'AND' and 'OR', with the 'AND' option currently selected. An orange circle highlights the 'Select...' dropdown menu.

25 Click "Content Download"

The screenshot shows the same configuration interface as in step 24. The 'Select...' dropdown menu is open, displaying a list of options: 'Account Based', 'Content Download', 'Content Syndication', 'Demo Signup', 'Drift Chat', 'Email', 'Event', and 'Form Fill'. The 'Content Download' option is highlighted with a blue background. An orange circle highlights the 'Content Download' option in the dropdown menu. The rest of the interface, including the 'Form Fill' dropdown and the 'Then...' section, remains the same as in step 24.

26 Click "ADD BLOCK"

Flows

Home Page (super admin only)

Object Manager

SFTP

Web Tracker

No definition has been provided for this field.

OR

campaign\_type equals

No definition has been provided for this field.

ADD RULE REMOVE BLOCK COLLAPSE

ADD BLOCK ADD OTHERWISE SAVE

Note: Changes to these settings will be reflected in your data after your next data co

27 Click "ADD RULE"

Flows

Home Page (super admin only)

Object Manager

SFTP

Web Tracker

No definition has been provided for this field.

OR

campaign\_type equals

No definition has been provided for this field.

ADD RULE REMOVE BLOCK COLLAPSE

Else If...

ADD RULE REMOVE BLOCK

ADD BLOCK ADD OTHERWISE SAVE

28 Click "Select..."

The screenshot shows a configuration interface with a sidebar on the left containing menu items: Flows, Home Page (super admin only), Object Manager, SFTP, and Web Tracker. The main area displays a rule editor. At the top, there is a text input field containing 'campaign\_type' followed by a dropdown arrow and the word 'equals'. Below this, there are three buttons: 'ADD RULE', 'REMOVE BLOCK', and 'COLLAPSE'. A blue bar labeled 'Else If...' is visible. Below it, a dropdown menu is open, showing a 'Select...' option highlighted with a blue circle. To the right of the dropdown is an 'Operator' field. At the bottom of the rule editor, there are three buttons: 'ADD BLOCK', 'ADD OTHERWISE', and 'SAVE'.

29 Click here.

This screenshot shows the same configuration interface as in step 28, but the dropdown menu is expanded to show a list of field names. The list includes: attrib\_date, campaign\_id, campaign\_name, campaign\_type (highlighted with a blue circle), cm\_amount, cm\_company\_domain, and cm\_company\_id. The 'Select...' option is still visible at the top of the dropdown. The 'Operator' field is also visible to the right. The 'ADD RULE', 'REMOVE BLOCK', and 'COLLAPSE' buttons are visible above the dropdown. The 'ADD BLOCK', 'ADD OTHERWISE', and 'SAVE' buttons are visible at the bottom of the rule editor.



30 Click here.

The screenshot shows a rule configuration interface. At the top, there is a dropdown menu for 'campaign\_type', a dropdown menu for the operator 'equals', and a text input field containing 'Content Download'. Below these fields, there is a note: 'Information has been provided for this field.' and 'The first 300 values are displayed.' Below the note, there are three buttons: 'REMOVE BLOCK', 'COLLAPSE', and 'ADD OTHERWISE'. At the bottom, there are two buttons: 'ADD OTHERWISE' and 'SAVE'.

31 Click "equals"

The screenshot shows the same rule configuration interface as in the previous image. The 'Operator' dropdown menu is open, showing a list of operators: 'equals', 'does not equal', 'contains', 'does not contain', 'starts with', 'does not start with', and 'ends with'. The 'equals' option is highlighted with a blue background and a yellow circle. Below the dropdown menu, there are three buttons: 'REMOVE BLOCK', 'COLLAPSE', and 'ADD OTHERWISE'. At the bottom, there are two buttons: 'ADD OTHERWISE' and 'SAVE'.

32 Click here.

The screenshot shows a configuration interface for a data tool. It features two filter rules. The first rule is labeled 'Content Download'. The second rule is labeled 'Select...' and has an orange circle highlighting its dropdown menu. Below the rules are 'AND' and 'OR' toggle switches. To the right, there is a 'Then...' section with a 'Value' field and a radio button.

33 Click "Inbound Sales - Email"

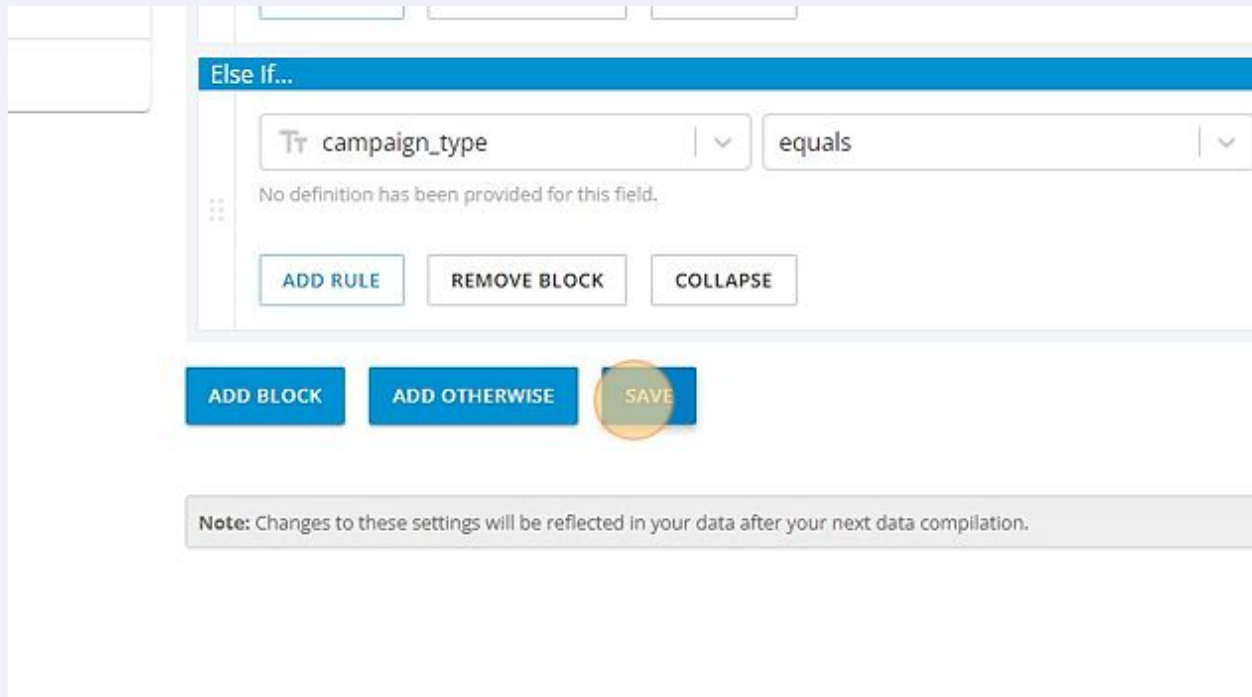
This screenshot shows the same interface as in step 32, but with the dropdown menu for the 'Select...' rule open. The menu lists several categories: 'Inbound Sales - Email', 'Inside Sales Team', 'Organic Search', 'Organic Social', 'Paid Search', 'Paid Social', and 'Product Usage'. The 'Inbound Sales - Email' option is highlighted with an orange circle.

**34** Click the "Value" field.

The screenshot shows a data integration tool interface. At the top, there is a section for 'Content Download' with a dropdown menu, a plus icon, and a trash icon. Below it, the text 'The first 300 values are displayed.' is visible. A toggle switch is set to 'AND'. Below this is a blue bar labeled 'Then...'. Underneath, there is a section for 'Inbound Sales - Email' with a dropdown menu, a plus icon, and a trash icon. Below it, the text 'The first 300 values are displayed.' is visible. A toggle switch is set to 'AND'. To the right of this section is a 'Value' field with a dropdown arrow, which is highlighted with an orange circle. Below the 'Value' field are three radio buttons: 'Value' (selected), 'Column', and 'Set to Null'.

**35** Type "1"

36 Click "SAVE"



Else If...

T campaign\_type | equals

No definition has been provided for this field.

ADD RULE REMOVE BLOCK COLLAPSE

ADD BLOCK ADD OTHERWISE SAVE

**Note:** Changes to these settings will be reflected in your data after your next data compilation.