Segments

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Creating a Segment

Segments allow you to filter contacts at the list level as well as based on their activity such as opening an email or subscription date. For example, you want to group contacts who are on list **A OR** list **B AND** have opened your last broadcast email. You can easily filter these contacts using Segment Conditions, and save the filtered contacts into a new list.

The significance of a Segment is that you can save the filters/segment conditions and run/scan it anytime to extract the updated data. To create a Segment, the following main 4 steps are needed to be followed.

1. Name the Segment
2. Apply Segment Conditions
3. Scan Contacts
4. Save Segment

To begin with creating a new segment, go to **Audience > Segments** in the left panel. The main **Segments** page will open. Click the **'Add Segment'** button from the top right to open a **'Create New Segment'** popup form.

1. Name the Segment

On the 'Create New Segment' popup form, enter the name in the 'Segment Name' field. For example, 'Small Animal Owners' is being entered in the image below. Click the 'Create' button.

2. Apply Segment Conditions

On the **Segment Details** page, you will find two key sections: **Segment Conditions** and **Contacts.**

- Segments are formed by applying specific conditions to your lists to scan the desired contacts.
- Contacts that meet these conditions are subsequently grouped into segments.

Prerequisite for creating a segment: Ensure that lists containing contacts are pre-defined within the system.

Available Segment Conditions

is on List: Using this condition, you can scan the contacts of multiple lists at a time, and group the contacts of different lists under one segment.
is not on List: Using this condition, you can scan the contacts of multiple lists at a time, and group the contacts that are not in any of the selected lists under one segment.
Subscription Date: Using this condition, you can group the contacts based on their subscription date.
Opened email: Using this condition, you can group the contacts who have opened a specific email.
Did not open email: Using this condition, you can filter the contacts who have not opened a specific email.

Applying a Single Condition to Scan

To filter contacts based on specific conditions, navigate to the **"Segment Conditions"** section and choose one of the main conditions (listed above) from the **drop-down menu.**

After selecting one of the above-mentioned conditions, navigate to the field on its right side. Click on the **'+'** sign and select from the dropdown menu to choose the relevant entity (list/subscription date/email).

Example 1: In the image below, selecting the **"is not on List"** condition ensures that contacts listed in **"May List," "March List,"** and **"June List"** are excluded from the segment being created.



Example 2: In the image below, selecting the **"did not open email"** condition ensures that contacts who have not opened any recent emails in the past 30 days will be added to the segment being created.



Applying Multiple Conditions to Scan

To refine segmentation by grouping contacts based on specific criteria using multiple conditions, the following two operators can be used to filter the contacts. To combine two conditions, you will add one condition, then click on the **OR** or **AND** to add next condition.

OR

AND

OR Operator

If you are using **"OR"** between two conditions, then even if one condition is true, the contacts will be filtered. For example, if you apply the following conditions:

Condition 1: *"is on the list A "*
OR
Condition 2: *"opened an email (email name)"*

Scanned Result: The contacts from list **A** plus the contacts who have opened the specific email will be listed in the scanned results.

Scenario
1. One condition is false: If list **A** was blank i.e., it did not contain any contact,
2. One condition is true: Some contacts opened the specified email.
Scanned result: The contacts who opened the specified email will be listed in the scanned result.

In short, if you are using the **OR** operator to combine two conditions, the system will scan the contacts even if one condition is true. The only case where no results will be displayed is when both conditions are false.

 When applying conditions using the **OR** operator, one or more lists can be selected. List selections are highlighted in **yellow,** as shown in the image below.



AND Operator

If you are using **"AND"** between two conditions, then the filtered contacts will be the combined result of both conditions i.e., only those contacts will be filtered that meet both the applied conditions. For example, if you apply the following conditions:

Condition 1: *"is on the list A "*
AND
Condition 2: "*opened an email (email name)*"

Scanned Result: Only those contacts from list **A** will be filtered who opened the specified email.

Scenario
1. One condition is false: If list **A** was blank i.e., it did not contain any contact,
2. One condition is true: There are contacts in the system who opened the specified email.
Scanned result: Zero contacts will be displayed.

In short, if you are using the **AND** operator to combine two conditions, the scanned result will display the contacts only if both conditions are true.

 When applying conditions using the **AND** operator, one or more lists can be selected. The lists are highlighted in **yellow.**



You can also use both **OR** and **AND** in one segment to create a combination of segment conditions. Please refer to the image shared below for a demonstration.

3. Scan Contacts

After selecting the conditions, click the **"Scan"** button to pull the contacts meeting the selected criteria.

The scanned contacts will populate under the **Contacts** section at the bottom of the **Segment Conditions**, as illustrated in the images below.

4. Save a Segment

Once the contacts are listed after clicking the **Scan** button, you can click the **'Save'** button at the top right to save the segment with the currently extracted contacts.

 Each time you click the **“Scan”** button, even for a previously saved segment, the selected conditions will be applied in real-time to extract the contacts. This implies that scanned results can vary depending on the time. For example, if you scanned a segment yesterday and got 4 contacts in the result, but today you got a different number of contacts or different contacts, then it could be due to the changes made to the list(s) to which you applied the segmented conditions.

Since the **Scan** function will always generate the updated results, therefore the segment will not always contain the same data. So, if you want to keep the currently scanned contacts always grouped, you can create a list from that segment.

Creating a list of segmented contacts

To create a new list from the scanned contacts, on the **Segment Details** page and click the **'Create List'** button located in the top right corner. This will open the **'Create New List'** popup window. In this window, you have the option to enter a name for the new list, which can be similar or different from the segment name you just created. For example, you could name it 'Group 1: animal owner' as shown in the image below. Once you have entered the desired list name, proceed to save the new list by clicking the **'Create'** button on the popup window.

Upon clicking the **'Create'** button, the new list will be created, and a success notification popup will appear at the top-right corner of the **Segment Details** page, as shown in the image below.

You can access this newly created list by navigating to the **Lists** page under the **Audience** section, as illustrated in the image below.

The list generated from a scan reflects the contacts that meet the specified conditions at the time of scanning. Therefore, if the conditions of the segment change or you scan the segment later, the list that you already saved will not be affected.