

LIST SEGMENTATION

Create Targeted Lists That Get Results



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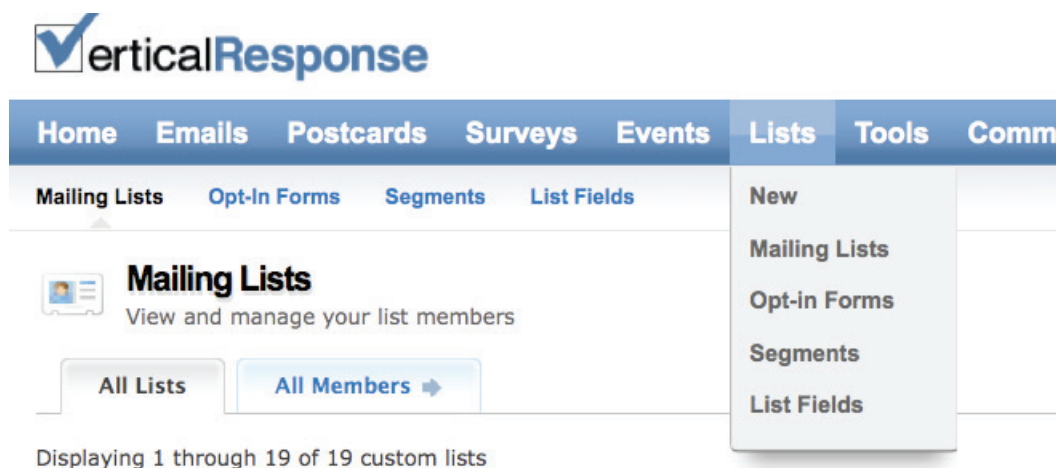
Quick Overview

What is List Segmentation?

The List Segmentation feature enables you to create new, unique mailing lists from the data found on your existing mailing lists, and the results of your sent email campaigns. You can “slice & dice” your data to create new targeted mailing lists based on the specific criteria that you set.

Where do I access the List Segmentation feature?

Simply log into your account and scroll over the List tab on the blue navigation bar. You will see the **Segments** option in the drop down menu. Just click on it to get started.



5 Simple Steps for Creating Segments

The List Segmentation feature was designed to meet the needs of all users. The tool can handle both basic and complex queries with ease. In this section we'll cover the steps you'll need to follow to build and run your target segment.

Create Your Segment in 5 Steps:

1. Name Your Segment

2. Choose Segment Type

3. Build Your Segment

4. Preview Results

5. Save Results

1

Name Your Segment:

Give it a name and brief description for quick reference.

2

Choose Segment Type:

Select one of the following options:

- Create a Simple Segment using a single data source (Lists or Campaigns)
- Create an Advanced Segment using multiple data sources (Lists, Campaigns & Saved Segments)
- Mass Merge Your Data – Technically it's not segmentation but it's a nice tool for merging multiple lists or campaign audiences into a single mailing list

3

Build Your Segment:

Use filters and rules to define your segmentation criteria.

4

Preview Results:

View a snapshot of your results set, go back and edit your segment or proceed to save the results.

5

Save Results:

Load your results as a new mailing list, split the results into randomized chunks or take a "slice" of the total result set.



Creating a new Simple Segment

List Members Only

Getting Started:

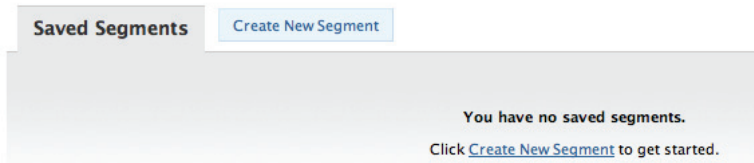
To begin, click on the Segment option within the List section. You will see the Saved Segments box, which will be empty, so go ahead and click “Create New Segment” to get started.

Name Your Segment:

On this step you will give your segment a name (required) as well as description (optional). The description field is useful as you’ll be able to add additional information that explains the rationale or business rules behind the segment if you need to reference this in the future.

Choose Segment Type:

On this step you’ll be presented with a few options, some simple and some more advanced. For this example we’ll choose one of the Simple Segment Options, specifically **Segment List Members Only**.



1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Segment Name:

Segment Description:

Enter any additional information about this segment (optional)

[« Cancel](#) [Choose Segment Type »](#)

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Simple Segment Options
Build a new segment using a single data source

- ☒ **Segment List Members Only**
Create a new mailing list by targeting members of one or more lists.
- ☐ **Segment Campaign Recipients Only**
Create a new mailing list by targeting recipients of one or more campaigns.

Advanced Segment Options
Build a new segment using multiple data sources.

- ☐ **Segment List Members & Campaign Recipients**
Create a new mailing list using data from existing mailing lists, sent campaigns and previously saved segments.

Data Merge Options
Merge multiple lists or campaign audiences into a single mailing list.

- ☐ **Merge List Members**
Combine the members of two or more lists into a single list.
- ☐ **Merge Campaign Recipients**
Combine the recipients of two or more campaigns into a single list.

[« Cancel](#) [Save & Build Segment »](#)



Creating a new Simple Segment - List Members Only

Build Your Segment:

Now it's time to begin the segmentation process and the first step is to select one or more mailing lists. Simply check the box next to the list(s) you'd like to segment and then click the "Done" button. You will then see the list selector page collapse and the segmentation filters will appear.

With the provided filters, use any of the standard or custom fields in your list(s) to build your segment. After you've selected your field, you can then choose an operation (i.e. contains, equals, starts with, etc) that will enable you to fine-tune your results. Lastly, input your specific search criteria into an empty text box and you're ready to go.

You can easily add additional filters to your segment by clicking the "Add Filter" link and just as quickly remove filters that are not needed. Once you've finished defining your segmentation criteria, click the Save & Get Results button to proceed.

Segment List Members Only

1. Select one or more lists, then click "Done"
2. Use the provided filters to define your segmentation criteria
3. Click "Save & Get Results" to find matching records

Switch to Advanced Mode

Members of New Webstore Customers

Select Lists...

Displaying 1 to 25 of 25 lists

List Name	Type	Size	Creation Date	Last Mailed
<input checked="" type="checkbox"/> New Webstore Customers	Email	9,996	Sep 13, 2007 10:54AM	Never
<input type="checkbox"/> State Reps	Email	18	Aug 31, 2007 3:44PM	Never
<input type="checkbox"/> Openers this week	Email	32	Aug 31, 2007 11:45AM	Never
<input type="checkbox"/> Large List Merge	Email	297,517	Aug 31, 2007 11:35AM	Never
<input type="checkbox"/> Global VIP File	Email	99,999	Aug 31, 2007 10:24AM	Never
<input type="checkbox"/> Master Customer List	Email	200,027	Aug 31, 2007 10:19AM	Never
<input type="checkbox"/> Car Newsletter	Email	20	Aug 31, 2007 10:16AM	Aug 31, 2007 11:39AM
<input type="checkbox"/> N. America & S. America	Email	82,500	Aug 31, 2007 10:09AM	Never
<input type="checkbox"/> EMEA, Australia & New Zealand	Email	50,000	Aug 31, 2007 10:03AM	Never
<input type="checkbox"/> Previous Buyers	Email	20	Aug 30, 2007 2:50PM	Aug 30, 2007 5:40PM
<input type="checkbox"/> Website Sign-Ups	Email	20	Aug 30, 2007 2:48PM	Aug 30, 2007 5:37PM

Page: 1 Sort by: Creation Date

Clear Selection Done

Segment List Members Only

1. Select one or more lists, then click "Done"
2. Use the provided filters to define your segmentation criteria
3. Click "Save & Get Results" to find matching records

Switch to Advanced Mode

Members of New Webstore Customers

Select Lists...

PRODUCT contains TV and

Created Date contains equals does not equal does not contain starts with ends with is empty is not empty

September 1, 2007 and September 30, 2007

Segment contains 1 rule

Cancel Save Segment Save & Get Results



Creating a new Simple Segment - List Members Only

Preview Results:

On this step you'll be able to see a snapshot of your segment results and it's helpful to use this as a checkpoint during the segment building process.

Carefully review your results and then decide if you'd like to go back and modify your segmentation criteria (expand or restrict the results) or move forward and save the data as a new mailing list.

In addition, the default preview will display columns for First Name, Last Name, Email Address and any standard or custom fields that were used in your segmentation criteria (i.e. PRODUCT).

If you'd like to add/remove columns to customize your preview, simply use the Adjust View tool. Select the fields you wish to see and then click Redraw Preview. Once you are ready to proceed and save your segment, click the "Save Results" link or button to move on to the next step.

1. Name Your Segment
2. Choose Segment Type
3. Build Your Segment
4. Preview Results
5. Save Results

Your segment will include list members matching ANY of the following rules:

- Rule #1: Members of **New Webstore Customers** where
 - PRODUCT** contains **TV**
 - and **Created Date** is between **September 01, 2007 and September 30, 2007**

Your segment generated 538 results.
If you are satisfied, click [Save Results](#) to create a new mailing list. Otherwise, click [Edit Segment](#) to go back to the previous step.

Displaying 1 through 20 of 200 preview results Pages: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#)

Email Address	First Name	Last Name	product
1001@verticalresponse.com	Janine	Reagan	LCD TV
1002@verticalresponse.com	Jasper	Smith	PLASMA TV
1005@verticalresponse.com	Jacob	Duncan	PROJECTION TV
1022@verticalresponse.com	Jane	Clinton	LCD TV
1023@verticalresponse.com	Jason	Hamilton	PLASMA TV
1026@verticalresponse.com	Jasper	Adams	PROJECTION TV

Adjust View
To modify the columns displayed for your preview, simply add or remove fields below and then click "Redraw Preview."

Created Date
Email Address
Fax
First Name
Gender
Home Phone
Last Name
Last Updated
Marital Status
Mobile Phone
Online Status

Redraw Preview



Creating a new Simple Segment - List Members Only

Save Results:

There are a variety of options for saving your segment results. You can choose the amount of results to save as well as how this data should be loaded as a new list(s).

In addition, the segment you defined will also be saved for future use or reference and it can be found in the Saved Segments area of your account.

Let's cover all of the segment saving options below:

1. Save All Results – As a Single List

Choose this option if you want to create a new mailing list that contains all of the records returned for your segment. Click the “Create Lists” button and a single mailing list will be loaded in the Mailing List Management section of your account.

The screenshot shows the '5. Save Results' step of a 5-step process. The main instruction is 'Choose how many results to save for your segment and how these records should be loaded.' There are two sections: 'Amount to save:' with radio buttons for 'All results (538)' (selected) and 'A random slice'; and 'Load results as:' with radio buttons for 'A single list' (selected) and 'Multiple lists'. Below this, a text box contains 'New Customers - TV Products' and a note says 'Segment results will be added to this mailing list.' At the bottom are 'Cancel', 'Back to Results', and 'Create Lists' buttons.

2. Save All Results – As Multiple Lists

Choose this option if you want all of the records returned for your segment divided into a specific number of randomized lists. The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.

This screenshot shows the '5. Save Results' step with 'Multiple lists' selected. It includes a 'Number of lists' input field set to '2' and an 'Allocate by' dropdown set to 'percent', with an 'Update' button. Below, it shows 'Segment results will be randomly divided among the following lists:' with two entries: 'New Customers - TV Products #1' and 'New Customers - TV Products #2', each with a '50' percent allocation. A 'Total Allocated: 100% (538 of 538)' summary is at the bottom. Navigation buttons are at the bottom.

In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

Click the “Create Lists” button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.



Creating a new Simple Segment - List Members Only

3. Save a Random Slice – As a Single List

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as a single mailing list.

You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500). Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.

The screenshot shows the '5. Save Results' step. Under 'Amount to save', 'A random slice' is selected. The 'Save' field is set to '25 percent' of '538' (134 results). Under 'Load results as', 'A single list' is selected. A text box contains 'New Customers - TV Products'. Buttons at the bottom include 'Cancel', '< Back to Results', and 'Create Lists >'.

4. Save a Random Slice – As a Multiple Lists

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as multiple mailing lists. You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500) and this data will then be allocated into 2 or more lists.

The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.

The screenshot shows the '5. Save Results' step. Under 'Amount to save', 'A random slice' is selected. The 'Save' field is set to '25 percent' of '538' (134 results). Under 'Load results as', 'Multiple lists' is selected. The 'Number of lists' is set to '3'. The 'Allocate by' dropdown is set to 'percent'. An 'Update' button is visible. Below, a table shows the allocation: 'New Customers - TV Products #1' will contain 34 percent, 'New Customers - TV Products #2' will contain 33 percent, and 'New Customers - TV Products #3' will contain 33 percent. The 'Total Allocated' is 100% (134 of 134). Buttons at the bottom include 'Cancel', '< Back to Results', and 'Create Lists >'.

In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

$25\% + 25\% + 25\% + 25\% = 100\%$ Or $25,000 + 25,000 + 25,000 + 25,000 = 100,000$.

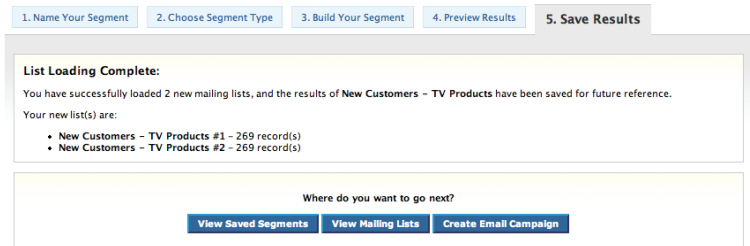
Click the "Create Lists" button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.



Creating a new Simple Segment - [List Members Only](#)

Post-Save Options:

After you've loaded your mailing list you will see a summary page which notes the number of mailing lists that were loaded and provides some informational text regarding your newly saved segment.



At this point you'll have the option to go back to the Saved Segments page, view your existing Mailing Lists or begin the creation of a New Email Campaign. Simply click the button that meets your needs.



Creating a new Simple Segment

Campaign Recipients Only

Getting Started:

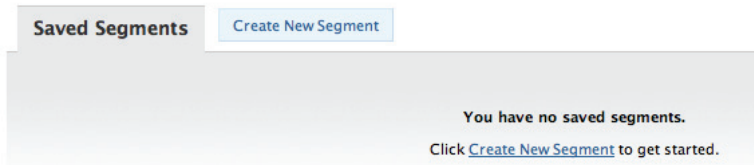
To begin, click on the Segment option within your List section. You will see the Saved Segments box, which will be empty, so go ahead and click “Create New Segment” to get started.

Name Your Segment:

On this step you will give your segment a name (required) as well as description (optional). The description field is useful as you’ll be able to add additional information that explains the rationale or business rules behind the segment if you need to reference this in the future.

Choose Segment Type:

On this step you’ll be presented with a few options, some simple and some more advanced. For this example we’ll choose one of the Simple Segment Options, specifically **Segment Campaign Recipients Only**.



1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Segment Name:

Segment Description:

Enter any additional information about this segment (optional)

[« Cancel](#) [Choose Segment Type »](#)

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Simple Segment Options
Build a new segment using a single data source

- ☐ **Segment List Members Only**
Create a new mailing list by targeting members of one or more lists.
- ☒ **Segment Campaign Recipients Only**
Create a new mailing list by targeting recipients of one or more campaigns.

Advanced Segment Options
Build a new segment using multiple data sources.

- ☐ **Segment List Members & Campaign Recipients**
Create a new mailing list using data from existing mailing lists, sent campaigns and previously saved segments.

Data Merge Options
Merge multiple lists or campaign audiences into a single mailing list.

- ☐ **Merge List Members**
Combine the members of two or more lists into a single list.
- ☐ **Merge Campaign Recipients**
Combine the recipients of two or more campaigns into a single list.

[« Cancel](#) [Save & Build Segment »](#)



Creating a new Simple Segment - Campaign Recipients Only

Build Your Segment:

Now it's time to begin the segmentation process and the first step is to select one or more email campaigns. Simply check the box next to the campaign(s) you'd like to segment and then click the "Done" button. You will then see the campaign selector page collapse and the segmentation filters will appear.

With the provided filters, use any of the standard or custom fields in your campaigns to build your segment. In addition, you will also be able to choose from campaign response types such as Opened, Clicked, Did not Open, Did not Click, etc.

After you've selected your field, you can then choose an operation (i.e. contains, equals, starts with, etc) that will enable you to fine-tune your results. Lastly, input your specific search criteria into an empty text box and you're ready to go.

You can easily add additional filters to your segment by clicking the "Add Filter" link and just as quickly remove filters that are not needed. Once you've finished defining your segmentation criteria, click the Save & Get Results button to proceed.

Segment Campaign Recipients Only

1. Select one or more campaigns, then click "Done"
2. Use the provided filters to define your segmentation criteria
3. Click "Save & Get Results" to find matching records

Switch to Advanced Mode

Recipients of Repeat Buyer Promotion, Interest Type: DVDs and CDs, Buy 1 Get 1 Free Promo, Website Sign-Ups Email and Google Analytics Target 2

Select Campaigns...

Displaying 1 to 20 of 20 campaigns

Campaign Name	Mail Date	Type	Status	Sent	Open	Click	Bounce	Unsub
<input checked="" type="checkbox"/> Interest Type: DVDs and CDs	Aug 31, 2007 11:38AM	Canvas	Sent	20	9	2	0	1
<input checked="" type="checkbox"/> Buy 1 Get 1 Free Promo	Aug 31, 2007 10:49AM	Canvas	Sent	5	2	2	0	0
<input checked="" type="checkbox"/> Repeat Buyer Promotion	Aug 30, 2007 5:39PM	Canvas	Sent	20	11	5	2	1
<input checked="" type="checkbox"/> Website Sign-Ups Email	Aug 30, 2007 5:35PM	Canvas	Sent	20	11	6	0	1
<input checked="" type="checkbox"/> Google Analytics Target 2	Aug 29, 2007 9:32PM	Canvas	Sent	5	1	1	0	0
<input type="checkbox"/> Google Analytics Target 1	Jul 30, 2007 11:28AM	Canvas	Sent	5	5	0	0	0
<input type="checkbox"/> Google Analytics Test	Jul 27, 2007 10:39AM	Canvas	Sent	5	4	0	0	0
<input type="checkbox"/> June Product Update	Jun 08, 2007 11:31AM	Canvas	Sent	42	35	0	2	0

Segment Campaign Recipients Only

1. Select one or more campaigns, then click "Done"
2. Use the provided filters to define your segmentation criteria
3. Click "Save & Get Results" to find matching records

Switch to Advanced Mode

Recipients of Repeat Buyer Promotion, Interest Type: DVDs and CDs, Buy 1 Get 1 Free Promo, Website Sign-Ups Email and Google Analytics Target 2

Select Campaigns...

Did not open within specific date range of... August 1, 2007 and September 30, 2007 Remove

Did not click any link within specific date range of... August 1, 2007 and September 30, 2007 Remove

any link
specific link...

Segment contains 1 rule

Cancel Save Segment Save & Get Results



Creating a new Simple Segment - Campaign Recipients Only

Preview Results:

On this step you'll be able to see a snapshot of your segment results and it's helpful to use this as a checkpoint during the segment building process.

Carefully review your results and then decide if you'd like to go back and modify your segmentation criteria (expand or restrict the results) or move forward and save the data as a new mailing list.

In addition, the default preview will display columns for First Name, Last Name, Email Address and any standard or custom fields that were used in your segmentation criteria (i.e. COMPANY_NAME).

If you'd like to add/remove columns to customize your preview, simply use the Adjust View tool. Select the fields you wish to see and then click Redraw Preview. Once you are ready to proceed and save your segment, click the "Save Results" link or button to move on to the next step.

1. Name Your Segment
2. Choose Segment Type
3. Build Your Segment
4. Preview Results
5. Save Results

Your segment will include list members matching ANY of the following rules:

- Rule #1: Recipients of Repeat Buyer Promotion, Interest Type: DVDs and CDs, Buy 1 Get 1 Free Promo, Website Sign-Ups Email, Google Analytics Target 2 where
 - Did not Open between August 01, 2007 and September 30, 2007
 - and Did not Click between August 01, 2007 and September 30, 2007

Your segment generated 32 results.

If you are satisfied, click [Save Results](#) to create a new mailing list. Otherwise, click [Edit Segment](#) to go back to the previous step.

Displaying 21 through 32 of 32 preview results Pages: 1 2

Email Address	First Name	Last Name
josh-test-contacts-21@verticalresponse.com	Denise	Ballston
josh-test-contacts-35@verticalresponse.com	Evan	Neilson
josh-df-8@verticalresponse.com	Nigel	Davis
josh-df-2@verticalresponse.com	David	Jones
josh-df-15@verticalresponse.com	Scott	Welch
josh-df-14@verticalresponse.com	Eric	Donney

Adjust View

To modify the columns displayed for your preview, simply add or remove fields below and then click "Redraw Preview."

Email Address
First Name
Last Name
Last Updated
Marital Status
Mobile Phone
Optin Status

Redraw Preview



Creating a new Simple Segment - Campaign Recipients Only

Save Results:

There are a variety of options for saving your segment results. You can choose the amount of results to save as well as how this data should be loaded as a new list(s).

In addition, the segment you defined will also be saved for future use or reference and it can be found in the Saved Segments area of your account.

Let's cover all of the segment saving options below:

1. Save All Results – As a Single List

Choose this option if you want to create a new mailing list that contains all of the records returned for your segment. Click the “Create Lists” button and a single mailing list will be loaded in the Mailing List Management section of your account.

The screenshot shows the '5. Save Results' step of a 5-step process. The main heading is 'Choose how many results to save for your segment and how these records should be loaded.' Under 'Amount to save:', 'All results (32)' is selected. Under 'Load results as:', 'A single list' is selected. A text box shows 'Non-Responders: 8/07 - 9/07' with a note 'Segment results will be added to this mailing list.' At the bottom, there are 'Cancel', '< Back to Results', and 'Create Lists >' buttons.

2. Save All Results – As Multiple Lists

Choose this option if you want all of the records returned for your segment divided into a specific number of randomized lists. The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.

The screenshot shows the '5. Save Results' step. Under 'Load results as:', 'Multiple lists' is selected. The 'Number of lists:' is set to 2, and 'Allocate by:' is set to 'percent'. An 'Update' button is next to it. Below, it shows 'Segment results will be randomly divided among the following lists:' with two entries: 'Non-Responders: 8/07 - 9/07 #1' and 'Non-Responders: 8/07 - 9/07 #2', each with a '50 percent' allocation. At the bottom, it says 'Total Allocated: 100% (32 of 32)'. Navigation buttons are at the bottom.

In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

Click the “Create Lists” button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.



Creating a new Simple Segment - Campaign Recipients Only

3. Save a Random Slice – As a Single List

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as a single mailing list.

You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500). Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.

Segment Your Lists
Editing "Non-Responders: 8/07 - 9/07"

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Choose how many results to save for your segment and how these records should be loaded.

Amount to save: ☐ All results (32) ☒ A random slice

Save percent of 32 (19 results)
Enter the number of results you want to keep.

Load results as: ☒ A single list ☐ Multiple lists

Segment results will be added to this mailing list.

[Cancel](#) [Back to Results](#) [Create Lists](#)

4. Save a Random Slice – As a Multiple Lists

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as multiple mailing lists. You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500) and this data will then be allocated into 2 or more lists.

The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.

Segment Your Lists
Editing "Non-Responders: 8/07 - 9/07"

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Choose how many results to save for your segment and how these records should be loaded.

Amount to save: ☐ All results (32) ☒ A random slice

Save percent of 32 (19 results)
Enter the number of results you want to keep.

Load results as: ☐ A single list ☒ Multiple lists

Number of lists: Allocate by: [Update](#)

Segment results will be randomly divided among the following lists:

Non-Responders: 8/07 - 9/07 #1	will contain	<input type="text" value="50"/> percent
Non-Responders: 8/07 - 9/07 #2	will contain	<input type="text" value="50"/> percent

Total Allocated: 100% (19 of 19)

[Cancel](#) [Back to Results](#) [Create Lists](#)

In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

Click the "Create Lists" button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.



Creating a new Simple Segment - Campaign Recipients Only

Post-Save Options:

After you've loaded your mailing list you will see a summary page which notes the number of mailing lists that were loaded and provides some informational text regarding your newly saved segment.

The screenshot shows a multi-step process with five tabs: 1. Name Your Segment, 2. Choose Segment Type, 3. Build Your Segment, 4. Preview Results, and 5. Save Results. The 'Save Results' tab is active. Below the tabs, a yellow box contains the text: 'List Loading Complete: You have successfully loaded 1 new mailing list, and the results of Non-Responders: 8/07 - 9/07 have been saved for future reference. Your new list(s) are: • Non-Responders: 8/07 - 9/07 - 32 record(s)'. Below this, another yellow box asks 'Where do you want to go next?' and provides three buttons: 'View Saved Segments', 'View Mailing Lists', and 'Create Email Campaign'.

At this point you'll have the option to go back to the Saved Segments page, view your existing Mailing Lists or begin the creation of a New Email Campaign. Simply click the button that meets your needs.

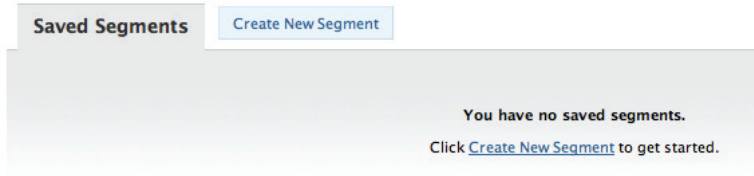


Creating a new Advanced Segment

List Members & Campaign Recipients

Getting Started:

To begin, click on the Segment option within your List section. You will see the Saved Segments box, which will be empty, so go ahead and click “Create New Segment” to get started.



Name Your Segment:

On this step you will give your segment a name (required) as well as description (optional). The description field is useful as you’ll be able to add additional information that explains the rationale or business rules behind the segment if you need to reference this in the future.

Choose Segment Type:

On this step you’ll be presented with a few options, some simple and some more advanced. For this example we’ll choose the Advanced Segment Options, specifically **Segment List Members & Campaign Recipients**.



Creating a new Advanced Segment - List Members & Campaign Recipients

Build Your Segment:

Now it's time to begin the segmentation process. You will see 3 icons that will enable you to choose the data sources to be included in your segment: Add List Rule, Add Campaign Rule and Add Saved Segment. With the Advanced Segment option you can create complex segments by joining multiple rules together and linking them with operations such as "AND", "OR" and "EXCLUDE."

Simply click one of the data source icons to get started. In this example we'll explain how to build an advanced segment using both a List Rule and a Campaign Rule.

First, click "Add List Rule" and then select one or more mailing lists. Simply check the box next to the list(s) you'd like to segment and then click the "Done" button. You will then see the list selector page collapse and the segmentation filters will appear.

With the provided filters, use any of the standard or custom fields in your lists to build your segment. After you've selected your field, you can then choose an operation (i.e. contains, equals, starts with, etc.) that will enable you to fine-tune your results. Lastly, input your specific search criteria into an empty text box and you're ready to go.

Now it's time to add another rule so click "Add Campaign Rule" and then select one or more campaigns lists. Simply check the box next to the campaigns(s) you'd like to segment and then click the "Done" button. You will then see the campaign selector page collapse and the segmentation filters will appear.

		Email		
<input type="checkbox"/>	Non-Responders: 8/07 - 9/07	32	Sep 13, 2007 11:38AM	Never
<input type="checkbox"/>	New Customers - TV Products #2	269	Sep 13, 2007 11:15AM	Never
<input type="checkbox"/>	New Customers - TV Products #1	269	Sep 13, 2007 11:15AM	Never
<input checked="" type="checkbox"/>	New Webstore Customers	9,996	Sep 13, 2007 10:54AM	Never
<input type="checkbox"/>	State Reps	18	Aug 31, 2007 3:44PM	Never
<input type="checkbox"/>	Opens this week	32	Aug 31, 2007 11:45AM	Never



Creating a new Advanced Segment - List Members & Campaign Recipients

Now you'll see the two rules you've created joined by an operation, in this case "OR." You can click this icon to toggle between operations as a way of expanding or restricting your segment results.

In the example below, we are building a segment that will join the results of the 2 rules we defined:

Rule 1: People on the "New Webstore Customers" List who have bought a TV-related product

Rule 2: People who have Opened & Clicked on the series of selected campaigns.

The final results will produce records that satisfy either the List Rule or the Campaign Rule. Once you've finished defining your segmentation criteria, click the Save & Get Results button to proceed. Note: By clicking the "Add Saved Segment" icon you can also include a previously saved segment as a rule in the current segment you are building.

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Segment List Members & Campaign Recipients

1. Add a List Rule or Campaign Rule
2. Select one or more lists or campaigns
3. Use the provided filters to define your segmentation criteria
4. Add additional rules and choose your operation ("AND", "OR" or "EXCLUDE")
5. Click "Save & Get Results" to find matching records

Note: Add results of a previously saved segment into your current segment by choosing "Add Saved Segment"

Add List Rule Add Campaign Rule Add Saved Segment

Rule #1: Members of New Webstore Customers

Select Lists...

PRODUCT contains TV

OR

Rule #2: Recipients of Interest Type: DVDs and CDs, Buy 1 Get 1 Free Promo, Repeat Buyer Promotion, Website Sign-Ups Email and Google Analytics Target 2

Select Campaigns...

Displaying 1 to 20 of 20 campaigns

Campaign Name	Mail Date	Type	Status	Sent	Open	Click	Bounce	Unsub
<input checked="" type="checkbox"/> Interest Type: DVDs and CDs	Aug 31, 2007 11:38AM	Canvas	Sent	20	9	2	0	1
<input checked="" type="checkbox"/> Buy 1 Get 1 Free Promo	Aug 31, 2007 10:49AM	Canvas	Sent	5	2	2	0	0
<input checked="" type="checkbox"/> Repeat Buyer Promotion	Aug 30, 2007 5:39PM	Canvas	Sent	20	11	5	2	1
<input checked="" type="checkbox"/> Website Sign-Ups Email	Aug 30, 2007 5:39PM	Canvas	Sent	20	11	6	0	1

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Segment List Members & Campaign Recipients

1. Add a List Rule or Campaign Rule
2. Select one or more lists or campaigns
3. Use the provided filters to define your segmentation criteria
4. Add additional rules and choose your operation ("AND", "OR" or "EXCLUDE")
5. Click "Save & Get Results" to find matching records

Note: Add results of a previously saved segment into your current segment by choosing "Add Saved Segment"

Add List Rule Add Campaign Rule Add Saved Segment

Rule #1: Members of New Webstore Customers

Select Lists...

PRODUCT contains TV

OR

Rule #2: Recipients of Interest Type: DVDs and CDs, Buy 1 Get 1 Free Promo, Repeat Buyer Promotion, Website Sign-Ups Email and Google Analytics Target 2

Select Campaigns...

Opened within no set date range and Clicked any link within no set date range



Creating a new Advanced Segment - List Members & Campaign Recipients

Preview Results:

On this step you'll be able to see a snapshot of your segment results and it's helpful to use this as a checkpoint during the segment building process.

Carefully review your results and then decide if you'd like to go back and modify your segmentation criteria (expand or restrict the results) or move forward and save the data as a new mailing list.

In addition, the default preview will display columns for First Name, Last Name, Email Address and any standard or custom fields that were used in your segmentation criteria (i.e. PRODUCT).

If you'd like to add/remove columns to customize your preview, simply use the Adjust View tool. Select the fields you wish to see and then click Redraw Preview. Once you are ready to proceed and save your segment, click the "Save Results" link or button to move on to the next step.

1. Name Your Segment
2. Choose Segment Type
3. Build Your Segment
4. Preview Results
5. Save Results

Your segment will include list members matching ANY of the following rules:

- Rule #1: Members of **New Webstore Customers** where
 - PRODUCT** contains **TV**
- Rule #2: Recipients of **Interest Type: DVDs and CDs**, **Buy 1 Get 1 Free Promo**, **Repeat Buyer Promotion**, **Website Sign-Ups Email**, **Google Analytics Target 2** where
 - Opened**
 - and **Clicked** any link

Your segment generated 551 results.

If you are satisfied, click [Save Results](#) to create a new mailing list. Otherwise, click [Edit Segment](#) to go back to the previous step.

Displaying 1 through 20 of 200 preview results Pages: 1 2 3 4 5 6 7 8 9 10

First Name	Last Name	Email Address	PRODUCT
Janine	Reagan	1001@verticalresponse.com	LCD TV
Jasper	Smith	1002@verticalresponse.com	PLASMA TV
Jacob	Duncan	1005@verticalresponse.com	PROJECTION TV
Jane	Clinton	1022@verticalresponse.com	LCD TV

Adjust View

To modify the columns displayed for your preview, simply add or remove fields below and then click "Redraw Preview."

Address 1
Address 2
car_type
City
Company Name
Country
Created Date
Email Address
Fax
First Name

Redraw Preview



Creating a new Advanced Segment - List Members & Campaign Recipients

Save Results:

There are a variety of options for saving your segment results. You can choose the amount of results to save as well as how this data should be loaded as a new list(s).

In addition, the segment you defined will also be saved for future use or reference and it can be found in the Saved Segments area of your account.

Let's cover all of the segment saving options below:

1. Save All Results – As a Single List

Choose this option if you want to create a new mailing list that contains all of the records returned for your segment. Click the “Create Lists” button and a single mailing list will be loaded in the Mailing List Management section of your account.

The screenshot shows the '5. Save Results' step of the segment creation process. The 'Amount to save' is set to 'All results (551)' and 'Load results as' is set to 'A single list'. A text box contains the segment name 'TV buyers & Best Responders'. Below the text box, it says 'Segment results will be added to this mailing list.' At the bottom, there are 'Cancel', '< Back to Results', and 'Create Lists >' buttons.

2. Save All Results – As Multiple Lists

Choose this option if you want all of the records returned for your segment divided into a specific number of randomized lists. The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.

In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

The screenshot shows the '5. Save Results' step for saving as multiple lists. 'Amount to save' is 'All results (551)' and 'Load results as' is 'Multiple lists'. 'Number of lists' is set to 4, and 'Allocate by' is set to 'percent'. An 'Update' button is next to the allocation settings. Below, a table shows the random division of results into four lists, each containing 25 percent of the total. At the bottom, it states 'Total Allocated: 100% (551 of 551)'. Navigation buttons 'Cancel', '< Back to Results', and 'Create Lists >' are at the bottom.

List Name	Allocation
TV buyers & Best Responders #1	25 percent
TV buyers & Best Responders #2	25 percent
TV buyers & Best Responders #3	25 percent
TV buyers & Best Responders #4	25 percent

25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

Click the “Create Lists” button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.



Creating a new Advanced Segment - List Members & Campaign Recipients

3. Save a Random Slice – As a Single List

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as a single mailing list.

You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500). Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Choose how many results to save for your segment and how these records should be loaded.

Amount to save: ☐ All results (551) ☒ A random slice

Save percent of 551 (247 results)
Enter the number of results you want to keep.

Load results as: ☒ A single list ☐ Multiple lists

Segment results will be added to this mailing list.

[Cancel](#) [Back to Results](#) [Create Lists >](#)

4. Save a Random Slice – As a Multiple Lists

Choose this option if you'd like to save only some of the records from your segment results and have this data loaded as multiple mailing lists. You can enter a percentage (i.e. 10% or 35%) or an exact record count (i.e. 15,000 or 45,500) and this data will then be allocated into 2 or more lists.

The default will be set to 2 lists (i.e. A/B split) but you can increase the number by entering a new value in the text box and clicking the Update button.

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Choose how many results to save for your segment and how these records should be loaded.

Amount to save: ☐ All results (551) ☒ A random slice

Save percent of 551 (247 results)
Enter the number of results you want to keep.

Load results as: ☐ A single list ☒ Multiple lists

Number of lists: Allocate by: [Update](#)

Segment results will be randomly divided among the following lists:

TV buyers & Best Responders #1	will contain	<input type="text" value="64"/>	results
TV buyers & Best Responders #2	will contain	<input type="text" value="61"/>	results
TV buyers & Best Responders #3	will contain	<input type="text" value="61"/>	results
TV buyers & Best Responders #4	will contain	<input type="text" value="61"/>	results

Total Allocated: 100% (247 of 247)

[Cancel](#) [Back to Results](#) [Create Lists >](#)

In addition, you can also toggle the allocation view for your lists to show either percentages or record counts. For example, a segment of 100,000 records could be split into 4 randomized lists and displayed as:

25% + 25% + 25% + 25% = 100% Or 25,000 + 25,000 + 25,000 + 25,000 = 100,000.

Click the "Create Lists" button and the data will then be loaded as multiple lists in the Mailing List Management section of your account.



Creating a new Advanced Segment - [List Members & Campaign Recipients](#)

Post-Save Options:

After you've loaded your mailing list(s) you will see a summary page which notes the number of mailing lists that were loaded and provides some informational text regarding your newly saved segment.

The screenshot shows a multi-step process with five tabs: 1. Name Your Segment, 2. Choose Segment Type, 3. Build Your Segment, 4. Preview Results, and 5. Save Results. The 'Save Results' tab is active. The main content area has a yellow header 'List Loading Complete:' followed by the text 'You have successfully loaded 2 new mailing lists, and the results of TV buyers & Best Responders have been saved for future reference.' Below this, it says 'Your new list(s) are:' followed by a bulleted list: '• TV buyers & Best Responders #1 - 276 record(s)' and '• TV buyers & Best Responders #2 - 275 record(s)'. At the bottom, a yellow box asks 'Where do you want to go next?' with three buttons: 'View Saved Segments', 'View Mailing Lists', and 'Create Email Campaign'.

At this point you'll have the option to go back to the Saved Segments page, view your existing Mailing Lists or begin the creation of a New Email Campaign. Simply click the button that meets your needs.



Mass Merging List Members

Getting Started:

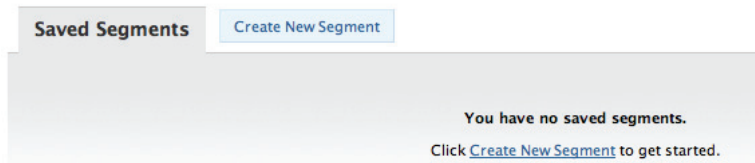
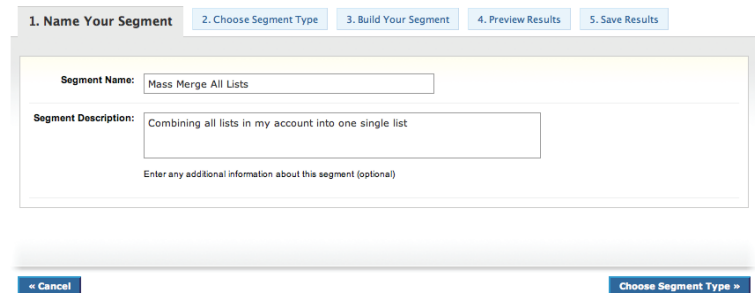
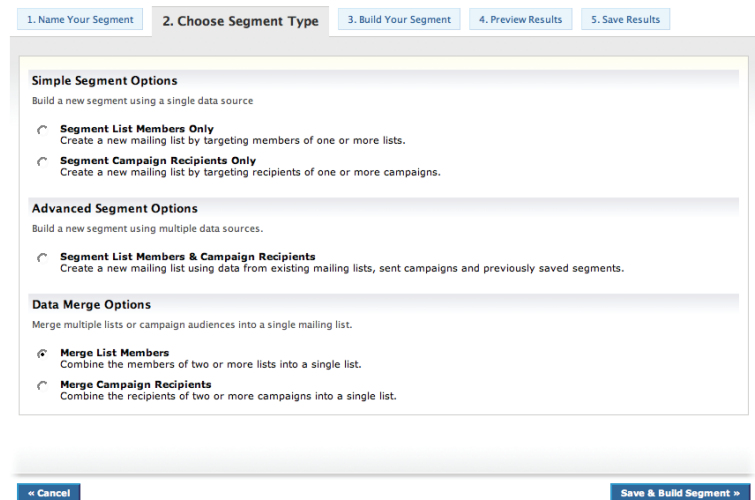
To begin, click on the Segment option within your List section. You will see the Saved Segments box, which will be empty, so go ahead and click “Create New Segment” to get started.

Name Your Segment:

On this step you will give your segment a name (required) as well as description (optional). The description field is useful as you’ll be able to add additional information that explains the rationale or business rules behind the segment if you need to reference this in the future.

Choose Segment Type:

On this step you’ll be presented with a few options, some for simple or advanced segmentation and some for data merging. For this example we’ll choose one of the Data Merge Options, specifically **Merge List Members**.


Mass Merging List Members

Build Your Segment:

Now it's time to begin the data merging process and the first step is to select two or more mailing lists. Simply check the box next to the lists you'd like to merge and then click the "Done" button. You will then see the list selector page collapse.

Since you are merging your data and not segmenting, you can simply click "Save & Get Results" to proceed.

Merge List Members

1. Select two or more lists, then click "Done"
2. Click "Save & Get Results" to merge your data

Switch to Advanced Mode

Members of Non-Responders: 8/07 - 9/07, New Customers - TV Products #2, New Customers - TV Products #1, New Webstore Customers, State Reps, Openers this week, Large List Merge and Global VIP File

Select Lists...

Displaying 1 to 28 of 28 lists

List Name	Type	Size	Creation Date	Last Mailed
<input checked="" type="checkbox"/> Non-Responders: 8/07 - 9/07	Email	32	Sep 13, 2007 11:38AM	Never
<input checked="" type="checkbox"/> New Customers - TV Products #2	Email	269	Sep 13, 2007 11:15AM	Never
<input checked="" type="checkbox"/> New Customers - TV Products #1	Email	269	Sep 13, 2007 11:15AM	Never
<input checked="" type="checkbox"/> New Webstore Customers	Email	9,996	Sep 13, 2007 10:54AM	Never
<input checked="" type="checkbox"/> State Reps	Email	18	Aug 31, 2007 3:44PM	Never
<input checked="" type="checkbox"/> Openers this week	Email	32	Aug 31, 2007 11:45AM	Never
<input checked="" type="checkbox"/> Large List Merge	Email	297,517	Aug 31, 2007 11:35AM	Never
<input checked="" type="checkbox"/> Global VIP File	Email	99,999	Aug 31, 2007 10:24AM	Never

Merge List Members

1. Select two or more lists, then click "Done"
2. Click "Save & Get Results" to merge your data

Switch to Advanced Mode

Members of Non-Responders: 8/07 - 9/07, New Customers - TV Products #2, New Customers - TV Products #1, New Webstore Customers, State Reps, Openers this week, Large List Merge and Global VIP File

Select Lists...

Segment contains 1 rule

Cancel Save Segment Save & Get Results »



Mass Merging List Members

Preview Results:

On this step you'll be able to see a snapshot of your data merge results and it's helpful to use this as a checkpoint during the list building process.

Carefully review your results and then decide if you'd like to go back and modify your merge criteria (add/remove lists) or move forward and save the data as a new mailing list.

In addition, the default preview will display columns for First Name, Last Name and Email Address. If you'd like to add/remove columns to customize your preview, simply use the Adjust View tool. Select the fields you wish to see and then click Redraw Preview.

Once you are ready to proceed and save your segment, click the "Save Results" link or button to move on to the next step.

Save Results:

There are a variety of options for saving your merge results. You can choose the amount of results to save as well as how this data should be loaded as a new list(s).

Since you chose this option to consolidate multiple lists, you'll most likely want to choose the default selection, which is to load the results as a single mailing list. Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Your segment will include list members matching ANY of the following rules:

- Rule #1: Members of Non-Responders: 8/07 - 9/07, New Customers - TV Products #2, New Customers - TV Products #1, New Webstore Customers, State Reps, Openers this week, Large List Merge, Global VIP File

Your segment generated 302,588 results.

If you are satisfied, click [Save Results](#) to create a new mailing list. Otherwise, click [Edit Segment](#) to go back to the previous step.

Displaying 1 through 20 of 200 preview results Pages: 1 2 3 4 5 6 7 8 9 10

First Name	Last Name	Email Address
Josh	Hotmail	vrtester1@hotmail.com
Joshua	Hotmail	joshua.feinberg@hotmail.com
Josh	Gmail	joshua.feinberg@gmail.com
Joshua	Feinberg	josh@verticalresponse.com
Julia	Samuels	pipeline-mforce17@verticalresponse.com
Leslie	Jerome	pipeline-mforce8@verticalresponse.com
Trevor	Gaverton	pipeline-mforce13@verticalresponse.com

Adjust View

To modify the columns displayed for your preview, simply add or remove fields below and then click "Redraw Preview."

☐ Email Address
☐ Fax
☐ First Name
☐ Gender
☐ Home Phone
☐ Last Name
☐ Last Updated
☐ Marital Status
☐ Mobile Phone
☐ Optin Status

Redraw Preview

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Choose how many results to save for your segment and how these records should be loaded.

Amount to save: ☒ All results (302,588) ☐ A random slice

Load results as: ☒ A single list ☐ Multiple lists

Segment results will be added to this mailing list.

[Cancel](#) [Back to Results](#) [Create Lists](#)

VerticalResponse

Home Emails Postcards Surveys Events **Lists** Tools Comm

Mailing Lists Opt-In Forms Segments List Fields

Mailing Lists
View and manage your list members

[All Lists](#) [All Members](#)

Displaying 1 through 19 of 19 custom lists

New
Mailing Lists
Opt-In Forms
Segments
List Fields



Mass Merging Campaign Recipients

Getting Started:

To begin, click on the Segment Your Lists tab within your Control Center. You will see the Saved Segments tab, which will be empty, so go ahead and click “Create New Segment” to get started.



Name Your Segment:

On this step you will give your segment a name (required) as well as description (optional). The description field is useful as you’ll be able to add additional information that explains the rationale or business rules behind the segment if you need to reference this in the future.

Choose Segment Type:

On this step you’ll be presented with a few options, some for simple or advanced segmentation and some for data merging. For this example we’ll choose one of the Data Merge Options, specifically **Merge Campaign Recipients**.



Mass Merging Campaign Recipients

Build Your Segment:

Now it's time to begin the data merging process and the first step is to select two or more email campaigns. Simply check the box next to the campaigns you'd like to merge and then click the "Done" button. You will then see the campaign selector page collapse.

Since you are merging your data and not segmenting, you can simply click "Save & Get Results" to proceed.

1. Name Your Segment **2. Choose Segment Type** **3. Build Your Segment** **4. Preview Results** **5. Save Results**

Merge Campaign Recipients

1. Select two or more campaigns, then click "Done"
2. Click "Save & Get Results" to merge your data

Switch to Advanced Mode

☒ Recipients of Interest Type: DVDs and CDs, Buy 1 Get 1 Free Promo, Repeat Buyer Promotion, Website Sign-Ups Email, Google Analytics Target 2, Google Analytics Target 1, Google Analytics Test and June Product Update

▼ Select Campaigns...

Displaying 1 to 20 of 20 campaigns

Campaign Name	Mail Date	Type	Status	Sent	Open	Click	Bounce	Unsub
<input checked="" type="checkbox"/> Interest Type: DVDs and CDs	Aug 31, 2007 11:38AM	Canvas	Sent	20	9	2	0	1
<input checked="" type="checkbox"/> Buy 1 Get 1 Free Promo	Aug 31, 2007 10:49AM	Canvas	Sent	5	2	2	0	0
<input checked="" type="checkbox"/> Repeat Buyer Promotion	Aug 30, 2007 5:39PM	Canvas	Sent	20	11	5	2	1
<input checked="" type="checkbox"/> Website Sign-Ups Email	Aug 30, 2007 5:35PM	Canvas	Sent	20	11	6	0	1
<input checked="" type="checkbox"/> Google Analytics Target 2	Aug 29, 2007 9:32PM	Canvas	Sent	5	1	1	0	0
<input checked="" type="checkbox"/> Google Analytics Target 1	Jul 30, 2007 11:28AM	Canvas	Sent	5	5	0	0	0

1. Name Your Segment **2. Choose Segment Type** **3. Build Your Segment** **4. Preview Results** **5. Save Results**

Merge Campaign Recipients

1. Select two or more campaigns, then click "Done"
2. Click "Save & Get Results" to merge your data

Switch to Advanced Mode

☒ Recipients of Interest Type: DVDs and CDs, Buy 1 Get 1 Free Promo, Repeat Buyer Promotion, Website Sign-Ups Email, Google Analytics Target 2, Google Analytics Target 1, Google Analytics Test and June Product Update

▼ Select Campaigns...

Segment contains 1 rule

Cancel Save Segment Save & Get Results »



Mass Merging Campaign Recipients

Preview Results:

On this step you'll be able to see a snapshot of your data merge results and it's helpful to use this as a checkpoint during the list building process.

Carefully review your results and then decide if you'd like to go back and modify your merge criteria (add/remove campaigns) or move forward and save the data as a new mailing list.

In addition, the default preview will display columns for First Name, Last Name and Email Address. If you'd like to add/remove columns to customize your preview, simply use the Adjust View tool. Select the fields you wish to see and then click Redraw Preview.

Once you are ready to proceed and save your segment, click the "Save Results" link or button to move on to the next step.

Save Results:

There are a variety of options for saving your merge results. You can choose the amount of results to save as well as how this data should be loaded as a new list(s).

Since you chose this option to consolidate multiple campaign audiences, you'll mostly likely want to choose the default selection, which is to load the results as a single mailing list. Click the "Create Lists" button and a single mailing list will be loaded in the Mailing List Management section of your account.

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Your segment will include list members matching ANY of the following rules:

- Rule #1: Recipients of Interest Type: DVDs and CDs, Buy 1 Get 1 Free Promo, Repeat Buyer Promotion, Website Sign-Ups Email, Google Analytics Target 2, Google Analytics Target 1, Google Analytics Test, June Product Update

Your segment generated 106 results.

If you are satisfied, click [Save Results](#) to create a new mailing list. Otherwise, click [Edit Segment](#) to go back to the previous step.

Displaying 61 through 80 of 106 preview results Pages: 1 2 3 4 5 6

First Name	Last Name	Email Address
Jane	Walters	pipeline-mforce1@verticalresponse.com
Betty	Peterson	pipeline-mforce4@verticalresponse.com
Charles	Krup	pipeline-mforce14@verticalresponse.com
Wendy	Cade	pipeline-mforce16@verticalresponse.com
Wesley	Binkerton	pipeline-mforce10@verticalresponse.com
Gerald	Little	pipeline-mforce5@verticalresponse.com
Carl	Baker	josh-test-contacts-37@verticalresponse.com

Adjust View

To modify the columns displayed for your preview, simply add or remove fields below and then click "Redraw Preview."

Choose Fields

- Email Address
- Fax
- First Name
- Gender
- Home Phone
- Last Name
- Last Updated
- Marital Status
- Mobile Phone
- Optin Status

Redraw Preview

1. Name Your Segment 2. Choose Segment Type 3. Build Your Segment 4. Preview Results 5. Save Results

Choose how many results to save for your segment and how these records should be loaded.

Amount to save: ☒ All results (106) ☐ A random slice

Load results as: ☒ A single list ☐ Multiple lists

Mass Merge: Campaign Recipients

Segment results will be added to this mailing list.

[Cancel](#) [Back to Results](#) [Create Lists »](#)



Home Emails Postcards Surveys Events **Lists** Tools Comm

Mailing Lists Opt-In Forms Segments List Fields

Mailing Lists
View and manage your list members

All Lists All Members ➔

Displaying 1 through 19 of 19 custom lists

New
Mailing Lists
Opt-In Forms
Segments
List Fields



List Segmentation FAQs & Glossary

What is a List Rule?

A list rule allows you to construct a new segment using the standard and custom fields found within your existing mailing lists. You can select one list or multiple lists to define your search criteria and then find matching results.

When would I use a List Rule?

You'll want to use a list rule if you're trying to find records that have a specific "field value." For example, to find people who bought a specific product and who live in California, New York and Texas you could construct a segment that focuses on a custom field called "PRODUCT" and the standard field of "STATE."

What are some examples of List Rules?

Great question, and this all depends on the data within your uploaded mailing lists. We'll provide some generic examples and hopefully this will generate some ideas for the types of list rules you'd want to build.

Ex. 1 Using standard fields

Find all records on List A, List B and List C where "State" equals California, New York, Texas

Ex. 2 Using custom fields

Find all records on List B and List D where "Product_Category" contains software, hardware, peripherals

Ex. 3 Using standard & custom fields

Find all records on List C, List D and List G where "Title" contains VP and "Purchase_Amount" is greater than or equal to \$100.00

What is a Campaign Rule?

A campaign rule allows you to reference data from your sent email campaigns to construct a new segment. When using a campaign rule you'll be able to access any of the standard and custom fields found on the list(s) you mailed to, as well as campaign response types such as "Opened", "Clicked", etc., to find records that match your search criteria.



List Segmentation FAQs & Glossary

When would I use a Campaign Rule?

You'll want to use a campaign rule when you are looking to isolate responders and non-responders for the campaigns you've sent. These segments can be based on specific campaign response types or date ranges for when the action was taken.

For example, you could use a campaign rule to find recipients who opened your email and clicked a link during the past 14 days and then build a new mailing list from these results.

What are some examples of Campaign Rules?

Great question and this all depends on the data that you have within your uploaded mailing lists and the response types you're looking to target. We'll give some generic examples and hopefully this will generate some ideas for the types of campaign rules you'd want to build.

Ex. 1 Using Response Types

Find all records on Campaign A, Campaign B and Campaign C who "Clicked" between June 1st, 2007 and June 15th, 2007.

Ex. 2 Using Response Types and Standard fields

Find all records on Campaign B and Campaign D who "Did not open" and whose "email address" contains aol.com, msn.com and yahoo.com

Ex. 3 Using Response Types, Standard fields and Custom fields

Find all records on Campaign C, Campaign D and Campaign G who "Opened" and who "Did not click" and whose "Company" equals Acme, Inc and "Product Interest" contains "autos, computers, travel"

What is a Saved Segment?

A saved segment is comprised of the parameters that you previously defined using list and/or campaign rules. When creating new segments, you can include a previously saved segment when defining your search criteria.



List Segmentation FAQs & Glossary

When would I use a Saved Segment?

Using saved segments is great time-saver as you can add fully constructed rules into your new query without taking the time to build them from scratch. Generating a bank of commonly used segments is a great way to speed up the process of segment building as it will get you to your desired result set much faster.

What are some examples of Saved Segments?

That's for you to decide! Since every user has different business needs, the types of saved segments will vary. Just know that each time you create a new segment using list and campaign rules it will automatically be saved into the "Saved Segments" section of the your account. Create as many as you like for easy and efficient segment creation in the future.

What is the "AND" operation?

The "AND" operation will return results that satisfy all of the defined rules within your segment. This operation tends to produce a smaller result set since it's more restrictive.

What is the "OR" operation?

The "OR" operation will return results that satisfy any of the defined rules within your segment. This operation tends to produce a larger result set since it's less restrictive.

What is the "EXCLUDE" operation?

The "EXCLUDE" operation requires exactly two rules to be constructed. It will take the results of Rule 2 subtract them from the results of Rule 1 to produce your final target audience. This operation is very useful for suppressing campaign recipients or lists members to make sure they are not added to the new mailing list.

What is "Merge List Members?"

This tool enables you to quickly and easily create a new mailing list by combining the records found on two or more existing lists. Simply select any of your saved mailing lists and a new list will be created containing the sum of all records found on the selected lists, minus duplicates.



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When would I merge List Members?

You would choose this option if you're looking to consolidate multiple lists into a master file for a variety of space-saving and time-saving reasons.

What is "Merge Campaign Recipients?"

This tool enables you to quickly and easily create a new mailing list by combining the records found on two or more sent campaigns. Simply select any of your previously sent campaigns and a new list will be created containing the sum of all records found on the lists you mailed to, minus duplicates.

