Unica Segment Central User's Guide

Contents

Chapter 1. About Segment Central

As the name suggests Segment Central is centralized application to create and manage strategic segments. In Segment Central we can create strategic segments based on audiences having base tables. Using base table mapping you can create rules, based on these rules the set of ids present inside each base table forms a segment. Segments will select records from the existing base table based on the defined rule. Segments can also be created using existing segments.

Chapter 2. Prerequisites for creating strategic segments

Before you create a strategic segment, you must meet the following prerequisites.

- You must have the appropriate permissions to work with strategic segments.
- For accessing Segment Central, it is must to have Audience Central configured with at least one Audience and its corresponding base table mapping.

Chapter 3. Creating strategic segments

To create strategic segments, complete the following steps:

1. Select **Marketing Central > Segment Central**

   The All segments page appears.

2. Click on **+ Segment** button

   Create new segment page appears

3. Provide values for the following fields:

   - Segment name
   - Description
   - Security policy - Any segment created will inherit its security policy and the list will appear in the dropdown.
   - Usage category - It is used for searching or grouping similar segments. It has auto complete feature. If you are adding a new tag, then on enter it will get saved and will be available for future use.

4. Segments can be created in two ways:

   - Using rule builder
   - Using existing segments

5. For creating segment Using rule builder, provide values for the following fields:

   a. **Select Audience** - Select the Audience from the dropdown.

      Select table - All the base tables mapped with that Audience appears in the dropdown of this field.

   b. Once the Audience and table is selected, section for defining rules appears. Provide values to **Field**, **Condition** and **Value** fields for defining rule. For some conditions multiple values can be added by clicking on the **+ADD** button.

   c. Click on **+Add rule** button for adding multiple rules.

      Complex rules can be created by adding groups. Set of rules can be clubbed in one group. Click on **+Add group** button for creating multiple groups.

6. Once the Audience and table is selected, section for defining rules appears. Provide values to **Field**, **Condition** and **Value** fields for defining rule.

7. For creating segment **Using existing segments**, provide values for the following fields:

- **Select Audience** - Select the Audience from the dropdown.
- **Select Operation** - Two types of operations are supported **Union** and **Intersection**

  Click **Add segments**

  Add segment page appears

  List of strategic published segments are displayed. User can also search for the segment using the **Search segments (across folders)** option or can select the segment from the folder list.

8. Select two or multiple segments and click **Select.**

   All the selected segment with number of records will be displayed on **Create new segment** page.

9. Click on the desired action button:

   a. **Test run** - Before publishing if you want to know the number of matching records out of total records, then click Test run. You can test run the process to verify that it returns the results you expect. If not, then you can modify the rule.

   b. **Cancel** - To cancel the segment creation

   c. **Save** - Segment gets saved in draft mode and is available for making changes.

   d. **Save & publish** - Segment gets saved and published.

   Note: Initially segment will be in publishing state (as all the matching records will be fetched) and once all the records are fetched it will be in Published state. If publishing is taking longer time than expected then you can cancel publishing.

Chapter 4. Viewing segment listing

Segment present on All Segments page will display the number of records present in that segment and also the last run date. For published segments, the date on which the segment was published will be displayed.

Sort by - You can sort the segments on the **All Segments** page by clicking on **Sort by** button. Following sorting options are available:

- Segment Name: Ascending
- Segment Name: Descending
- Count: Ascending
- Count: Descending
- Last Run Date: Ascending
- Last Run Date: Descending

You can also filter segments based on their status. Options available are:

- All
- Draft Segment
- Publishing Segment
- Failed Segment
- Publishing Segment
- Cancelled Publish

Chapter 5. Viewing strategic segments

After creating segments, you can view its summary. To view segment, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**
   The **All Segments** page appears
2. Click the name of the segment that you want to view.
3. The Summary page provides information about the segment.

Element	Description
Segment Name	Display the name of the segment
Segment Type	Display segment type
Status	Status of the segment, for example Draft, Published and Failed
Security Policy	The security policy applied to the strategic segment
Description	The description of the segment provided during segment creation
Usage category	The tags added to the segment
Audience level	The audience level for the segment
For rule based segment	It will have table name and rule representation
For composite segment	It will have operations and names of member segment

Chapter 6. Editing a strategic segment

You can change the details of a strategic segment.

1. Select **Marketing Central > Segment Central**
2. Click the name of the segment whose summary you want to edit

   The segment opens to its Summary tab.
3. Click **Edit**

   The **Edit segment** page appears.
4. For draft segments, rule or compositions can be edited along with other basic details.

   For other segments, only basic details can be edited.
5. Click **Save**

   Segment updated successfully

   > **Note:** Listing will list campaign created segments as well as smart segments created by interact. For both these types, only basic details can be edited. We cannot change their states.

Chapter 7. Moving a segment

For moving a segment, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**
   The **All Segments** page appears
2. Open the folder that contains the segment that you want to move.
3. Select the check box for the segment that you want to move. Select Move icon
   Or
4. You can select multiple segments to move to the same location at one time. Select Action button and click on move option
5. Select the location to which you want to move the selected segment.
6. Click **Move here**
   A **Move segments** confirmation message saying **Are you sure? You are about to move the selected (n) segments into the folder 'Folder name'** appears.
7. Select **Move**
   The segment is moved into the destination folder.

Chapter 8. Deleting strategic segments

Use the following procedure to delete a strategic segment directly from the All Segments page.

1. From the Platform home page, select **Marketing Central > Segment Central**
   The **All Segments** page appears.
2. Open the folder that contains the segment that you want to delete.
3. Select the check box next to the segment that you want to delete. You can select multiple segments to delete at one time.
4. Click **Delete**
   The **Delete segments** confirmation message appears saying A**re you sure? You are about to delete the selected (n) segments and they will not be available in the future** appears.
5. Click **Delete**.

Chapter 9. Organizing strategic segments

You can organize your strategic segments by creating a folder or series of folders. You can then move strategic segments from one folder to another within the folder structure you have created.

Note: The folder in which a strategic segment resides specifies the security policy applying to the strategic segment, determining who can access, edit, or delete it.

Adding a segment folder

You can add, move, and delete folders to organize strategic segments. For adding a new folder, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

   The **All Segments** page appears

2. Click **+Folder**

   The Add folder pop-up appears

3. Provide values for the following fields:
   - Display name
   - Security policy
   - Description

4. Click **Save**

   Folder created successfully.

Editing a segment folder

For editing a segment folder, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

   The **All Segments** page appears

2. Select the folder that you want to edit. Right click on the folder and click on Edit option. Else, from the folder list section, click on **Actions** button and select **Edit** option.

The **Edit segment** pop-up appears.

3. Make the required changes.

4. Click **Save**

Moving a segment folder

You can organize strategic segments by creating folders for them, and then moving the folders into a hierarchical structure. For moving a new folder, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

   The **All Segments** page appears

2. Select the folder that you want to move. Right click on the folder and click on Move option. Else, from the folder list section, click on **Actions** button and select **Move** option.

   The **Selected folders** page appears.

3. Select the location to which you want to move the selected folder.

4. Click **Move here**.

   A **Move folders** confirmation message saying Are you sure? You are about to move the selected (n) folders into the folder 'Folder name' appears.

5. Select **Move**.

   The subfolder and all of its segments are moved into the destination folder.

Deleting a segment folder

You must move or delete the contents of a folder before you can delete it. If you have the permissions that are required to delete a folder, you can also delete any of the subfolders in that folder. For deleting a folder, complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

   The **All Segments** page appears

2. Locate the folder that you want to delete and select the check box next to the folder. You can select multiple folders to delete at one time.

3. Select the folder that you want to delete. Right click on the folder and click on delete option. Else, from the folder list section, click on **Actions** button and select **Delete** option.

   The **Delete folders** confirmation message appears saying **Are you sure? You are about to delete the selected folders and once deleted they will not be available in the future** appears.

4. Click **Delete**.

   > **Note:** Folders with active/inactive segments cannot be deleted.

Duplicating a segment folder

You duplicate folders before taking any action. If you have the permissions that are required to duplicate a folder, then complete the following steps:

1. From the Platform home page, select **Marketing Central > Segment Central**

   The **All Segments** page appears

2. Locate the folder that you want to suplicate and select the check box next to the folder. You can select multiple folders to duplicate at one time.

3. Select the folder that you want to duplicate and from the segment list section, click on **Actions** button and select **Duplicate** option.

   The **Duplicate folders** confirmation message appears saying **Are you sure? You are about to duplicate the selected (n) segments. The new duplicate segments will be created in the same folder.** appears.