

WORKING WITH FILTERS



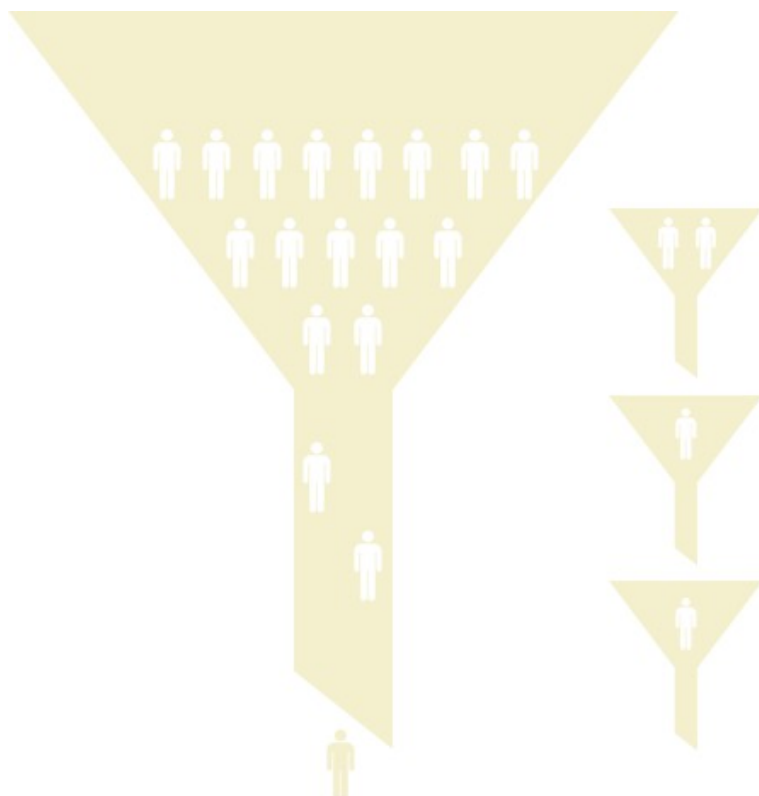
Introduction

List segmentation is an important factor while planning your campaign strategy. With **emailmanager** you can send a customized content to your contacts who have some characteristics in common. This manual presents all the necessary information that will help you to understand how filters work and how to define various segment option before sending a campaign. Therefore, it is important that you understand the **emailmanager** resources on the website, and use them to improve your return on investment.

From this guide you will learn:

- ✓ About filter segmentation and its function
- ✓ To create segmentation
- ✓ To define a filter condition (option)
- ✓ To send campaigns using a segmentation

Take a look at the other guides available on our site and find out how to benefit from the **emailmanager** platform.



Segmentation – How to use this resource?

Campaign segmentation is one of the feature that makes email marketing stand out above other forms of marketing. The segmentation is essential in strategies, in which you seek to achieve specific campaign goals. (Ex. When you want to focus on contacts that have previously generated conversions). Generally, you can segment your contacts base by using filters. Our filters make contacts segmentation easy to implement. Take a look below, where we explain the functionality of our filters.

Optimize your campaigns, segment your contacts and send email campaigns based on their preferences. **Emailmanager** allows you to enter various data about each customer (gender, address, telephone number and preferences). You also can create campaigns for already segmented contacts and continually increase conversion rates of your email marketing campaign.

For example, if you only want to send your campaign to contacts that use Gmail accounts, simply create a segmentation. The same way you can create a campaign focused on female audience, or older that 40 years old contacts and so on.



Now you know why it is so important to know how to use all the features on emailmanager? Ok. Now we are going to learn to use the segmentation option available on **emailmanager** and apply it to contact groups that have some common characteristics.

Getting to know our resources

In order to create segmentations, simply access the option: **Lists** at the top of the page. Now you can see that the system displayed the option: **Segmentation** on the right corner of the page.

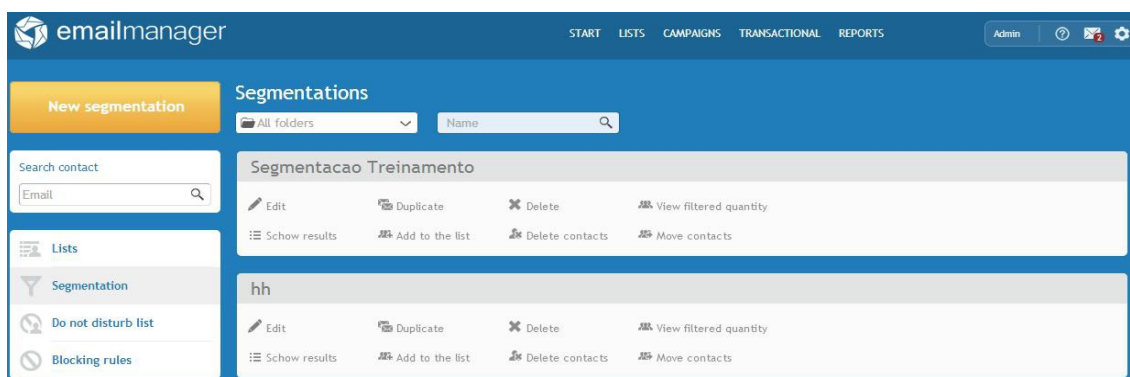
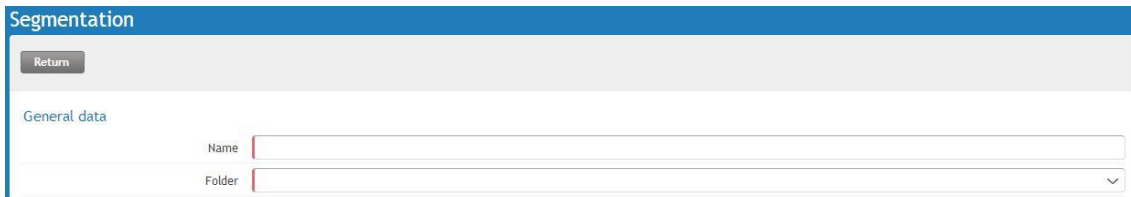


Image - Segmentation

Click the button: **New segmentation** in order to create filter conditions that will be used to segment your contacts list.

Setting filtering conditions

The regular campaign summary allows collecting both: a general or particular information about the campaign performance during selected period. Take a look at the regular campaign reports presented below:

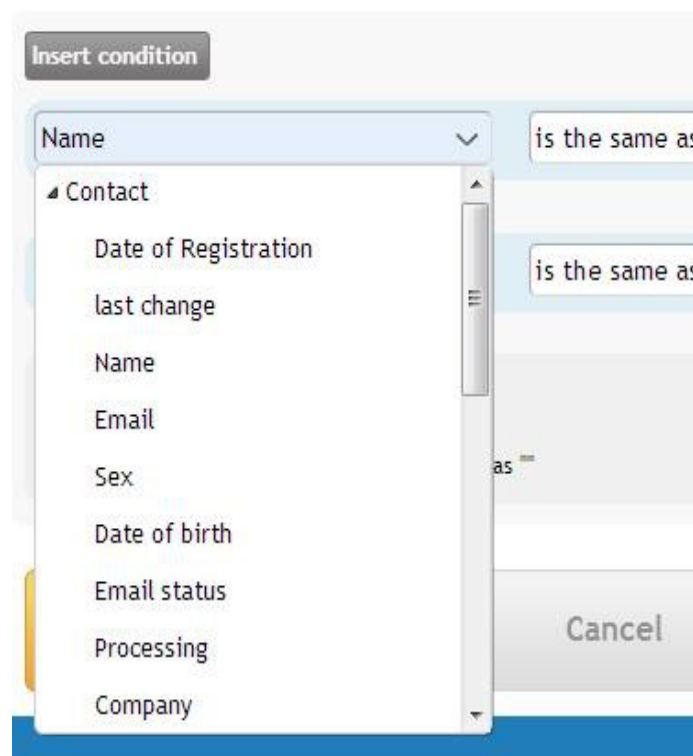


The image shows a web interface titled "Segmentation". At the top left, there is a "Return" button. Below it, the "General data" section contains two input fields: "Name" and "Folder". The "Folder" field is a dropdown menu.

Filter parameters

Now we need to define conditions that we want to use for selecting our contacts. For each field of information (where the system stores contacts information), you can define a filter condition. It is also possible to set more than one condition (depending on your needs).

In the example below we create a segmentation and select only these customers who live in the state of Minas Gerais (Brazil) and have interacted in the last campaign. To do so, the first thing we need to define is a field that is going to be used as our base. In this case, let's select from the first dropdown menu: **State**.



The image shows a dialog box titled "Insert condition". It features a dropdown menu with "Name" selected. To the right of the dropdown, the text "is the same as" is visible. Below the dropdown, a list of fields is shown, including "Contact", "Date of Registration", "last change", "Name", "Email", "Sex", "Date of birth", "Email status", "Processing", and "Company". A "Cancel" button is located at the bottom right of the dialog.

Now we need to define a type of comparison we want to use in this field. In other words: a condition that needs to be fulfilled in this field to proceed.

A dropdown menu with a light blue header containing the text "is the same as" and a downward arrow. Below the header, there are four white options with light blue borders: "is the same as" (highlighted with a light blue background), "is different from", "contain", and "does not contain".

Bearing in mind that there could have been some errors during the registration process (wrong letter/space might have been added without intention), we will choose the option: **is the same as** to make sure that we select all our contacts regardless of the errors that occurred while typing.

Please remember, that if the selected field to filter is not the **State**, and you choose to select any other field, the comparison will not be the same.

Let's create a filter: "Minas Gerais" (as we want to see contacts that live in this state). We can see below, that the system only displays contacts that are from Minas Gerais (Brazil).

A horizontal filter rule with three white boxes with light blue borders. The first box contains "State" and a downward arrow. The second box contains "is the same as" and a downward arrow. The third box contains "Minas Gerais".

We will now create a second condition. We are going to select only those contacts that have interacted in our last campaign. To do so, click on the **Insert condition** button and a new row will be added to this segment.

Select **Interactions>With** as a field for selections, then **interactions** in condition field, and **Last campaign**.

A horizontal filter rule with three white boxes with light blue borders. The first box contains "With" and a downward arrow. The second box contains "interactions in the" and a downward arrow. The third box contains "Last campaign".

Among the conditions, there is a feature that you should also get familiar with. What kind of relationship is it going to be between the applied conditions, if the selected contact needs to meet one of the conditions (OR), or if it needs to meet two conditions at the same time (AND).

Two horizontal filter rules stacked vertically. The top rule has three white boxes with light blue borders: "With" (with a downward arrow), "interactions in the" (with a downward arrow), and "Last campaign". Below the first two boxes, there are two radio button options: "OR" (selected) and "AND". The bottom rule has three white boxes with light blue borders: "State" (with a downward arrow), "is the same as" (with a downward arrow), and "Minas Gerais".

To filter our example, we are going to use **"AND"**, because we want our selected contacts to be from "Minas Gerais" state **"AND"** we also want them to have some kind of interactions with our last campaign.

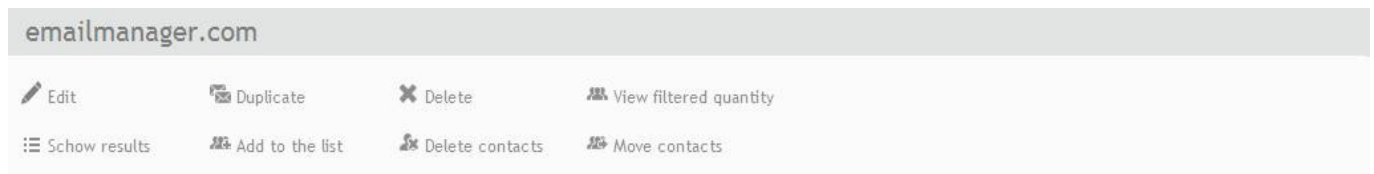


Done!

You have just created a segmentation for selecting contacts from Minas Gerais who have interacted with your latest campaign. Now that you know how the segmentation works, you can use this feature to specify email marketing campaigns before sending.

Segmentation options

After creating our segmentation we can use it in different ways, depending on our needs. We are going to list down the available options that suit your needs.



Edit: Use this option to change the filter conditions created for this segmentation.

Result list: This option lists all the email addresses that were selected by the segmentation filter according to the specified conditions.

Duplicate: This option creates a new segmentation with the same characteristics as the existing segmentation.

Add a list: By using this option you can add filter results to a new list without deleting your selected contacts from your list.

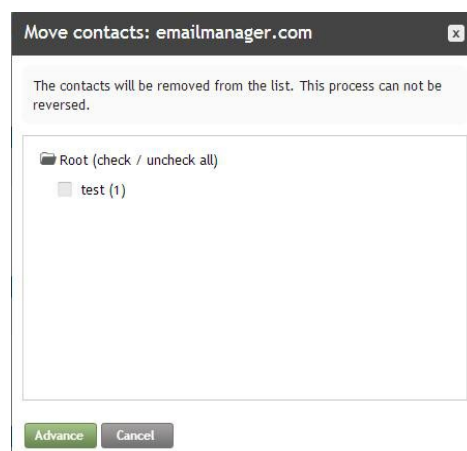
Delete: You can use this option to delete the segmentation.

Remove contacts: This option removes the selected contacts from the lists. This way you will be able to permanently exclude the filter result from your contact database.

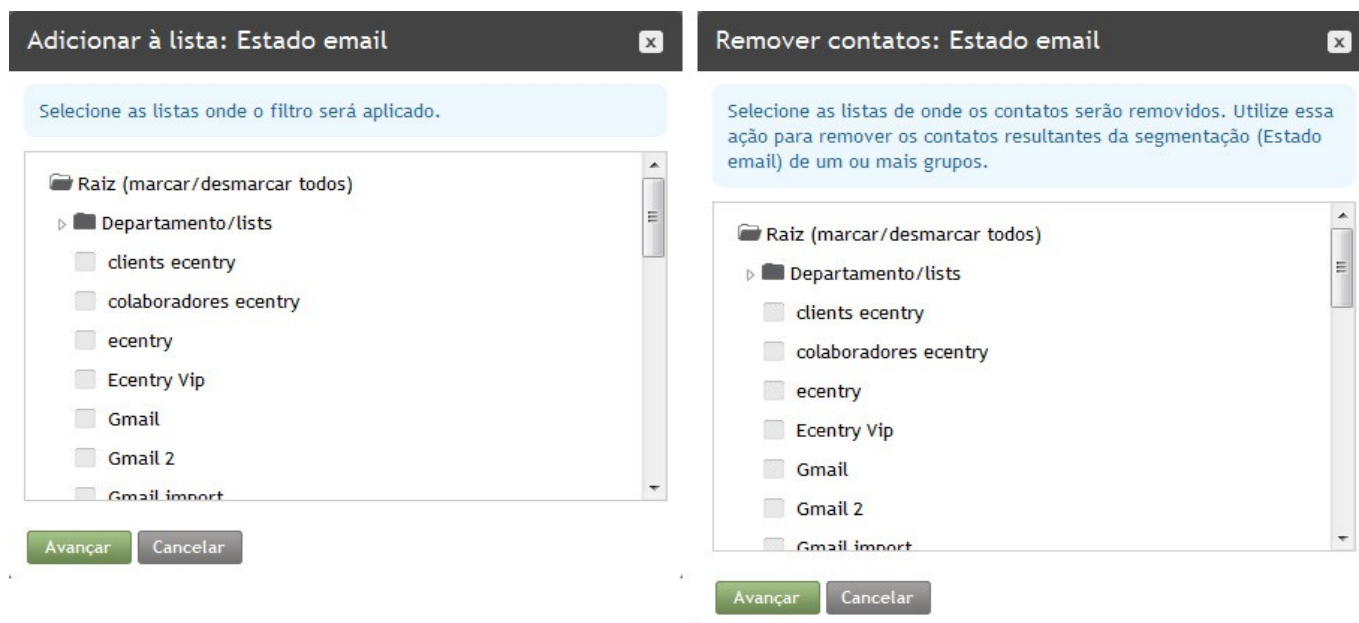
Display filtered contacts: Use this option to check only the number of segmented contacts.

Move contacts: Use this option to move the segmentation result to another list. Remember, that this option remove contacts from the list they are assigned to and adds them to the other list that you have selected.

Whenever you use one of the above options, a dialog box will appear asking you to select contact lists to which you want to apply your segmentation.



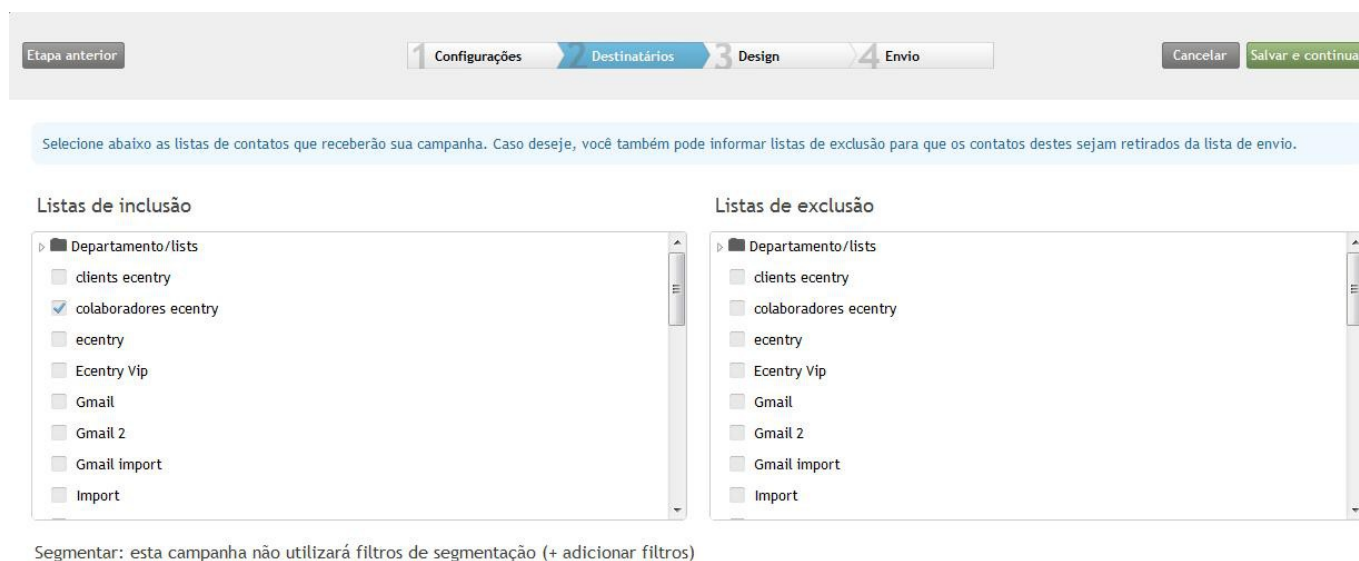
When using the options: **Add to list** and **Move contacts**, you have to select the lists to which segmentation will be applied (first image below) and destination contacts lists selected during the segmentation (the second window).



Segmenting and Sending campaigns

You can use segmentations in order to list a number of contacts that do not meet certain conditions. You also can use the created segmentation to dispatch your campaign. Instead of selecting a mailing list, you can only select the segmentation so the system will only send your campaign to contacts that meet the condition you have created.

In the campaign wizard (step 2), click on the option **(+ additional filters)**. Select the folder where you saved the segmentation and then select a filter you want to use for your campaign. Please note, that you also have to select the lists of inclusion and exclusion.



Import Import

Segmentar: esta campanha utilizará filtros de segmentação (– remover filtros)

Pastas Filtros

Geral Estado email

SELECIONE os registros da lista de Contatos
QUE
Status email é igual a "OK"

Now simply click: **Save and Continue** to complete the process.



See how easy it is?

Now you know how to create and work with segmentation filters. Maximize your online campaign submissions by using our support guides and get the maximum potential of the **emailmanager**.