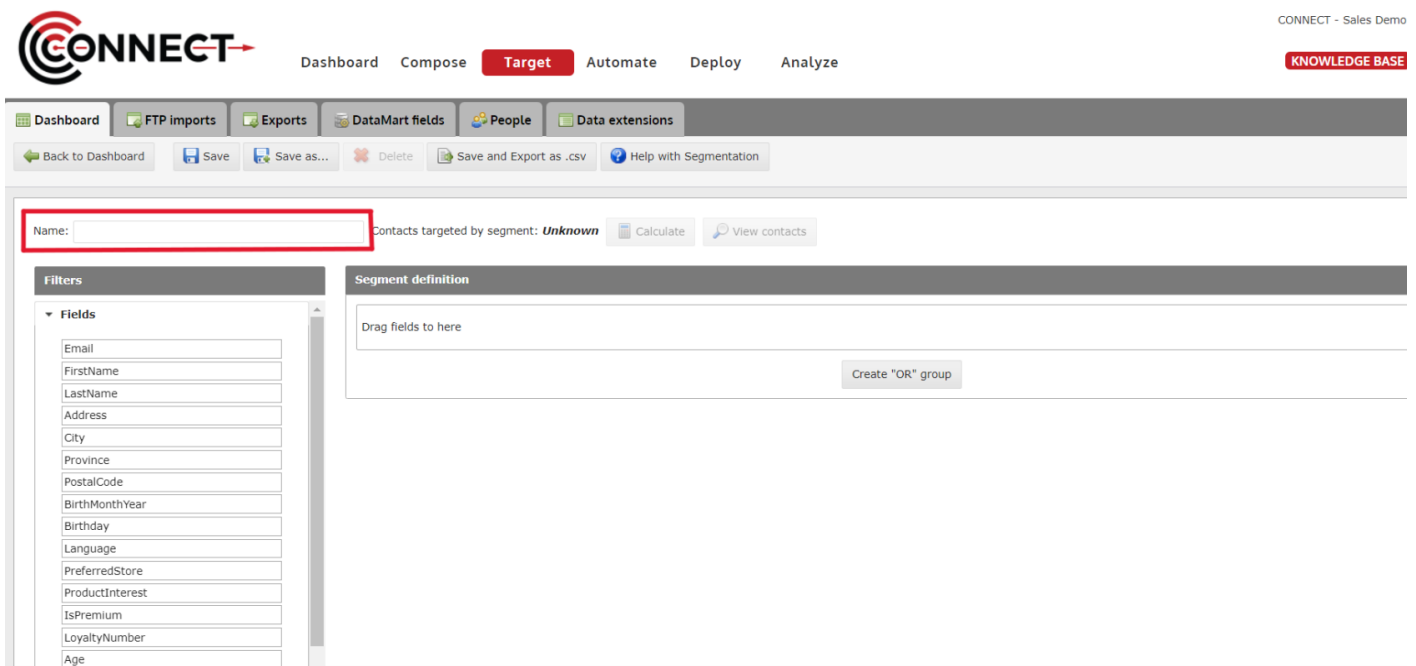


# How to Target Contacts Based on their Permission Level

This feature allows you to target contacts based on their permission level for a specific subscription.

## 1. Name your Segment



The screenshot shows the CONNECT interface with the 'Target' tab selected. The 'Segment definition' section is visible, featuring a 'Name:' input field (highlighted with a red box) and a 'Contacts targeted by segment: Unknown' status. Below the input field is a list of fields for selection, including Email, FirstName, LastName, Address, City, Province, PostalCode, BirthMonthYear, Birthday, Language, PreferredStore, ProductInterest, IsPremium, LoyaltyNumber, and Age. The 'Segment definition' area also includes a 'Drag fields to here' instruction and a 'Create "OR" group' button.

CONNECT - Sales Demo

Dashboard Compose **Target** Automate Deploy Analyze

KNOWLEDGE BASE

Dashboard FTP imports Exports DataMart fields People Data extensions

Back to Dashboard Save Save as... Delete Save and Export as .csv Help with Segmentation

Name:  Contacts targeted by segment: *Unknown* Calculate View contacts

Filters

Fields

- Email
- FirstName
- LastName
- Address
- City
- Province
- PostalCode
- BirthMonthYear
- Birthday
- Language
- PreferredStore
- ProductInterest
- IsPremium
- LoyaltyNumber
- Age

Segment definition

Drag fields to here

Create "OR" group

- In "Create new segment ", you can now target recipients from a specific subscription based on their permission level

## 2. Click on Subscriptions

Back to Dashboard Save Save as... Delete Save and Export as .csv Help with Segmentation

Name:  Contacts targeted by segment: **Unknown** Calculate View contacts

Filters

- Fields
- Behaviour
- Subscriptions**
  - Newsletter
  - Promotional
  - B2B
- Contacts
- Source

Segment definition

Drag fields to here

Create "OR" group

## 3. Drag and drop it in the Segment

Name:  Contacts targeted by segment: **Unknown** Calculate View contacts

Filters

- Fields
- Behaviour
- Subscriptions**
  - Newsletter
  - Promotional
  - B2B
- Contacts
- Source

Segment definition

Newsletter Permission Equals Subscribed Add Date Range

Subscribed includes Express, Implied and Double Opt-in

Create "OR" group

## 4. Select the Operator

Name:  Contacts targeted by segment: **Unknown** [Calculate](#) [View contacts](#)

**Filters**

- Fields
- Behaviour
- Subscriptions
  - Newsletter
  - Promotional
  - B2B
- Contacts
- Source

**Segment definition**

Newsletter Permission   [Add Date Range](#) x

Subscribed includes Express, Implied and Double Opt-in

[Create "OR" group](#)

## 5. Select the Permission Level

Name:  Contacts targeted by segment: **Unknown** [Calculate](#) [View contacts](#)

**Filters**

- Fields
- Behaviour
- Subscriptions
  - Newsletter
  - Promotional
  - B2B
- Contacts
- Source

**Segment definition**

Newsletter Permission   [Add Date Range](#) x

Subscribed includes Express, Implied and Double Opt-in

[Create "OR" group](#)

## 6. Click on Add a Date Range

Name:  Contacts targeted by segment: **Unknown** [Calculate](#) [View contacts](#)

**Filters**

- Fields
- Behaviour
- Subscriptions
  - Newsletter
  - Promotional
  - B2B
- Contacts
- Source

**Segment definition**

Newsletter Permission   [Add Date Range](#) x

Subscribed includes Express, Implied and Double Opt-in

[Create "OR" group](#)

---

## 7. Select when it was Last Updated

**Segment definition**

Newsletter Permisson

Equals

Double Opt-In

Permission Capture Date

Specific

Equals

Define time

Create "OR" group

---

## 8. Date Picker

**Segment definition**

Newsletter Permisson

Equals

Double Opt-In

Permission Capture Date

Specific

Equals

Define time

October 2023						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

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## 9. "Relative" Date Option

- Relative date option can be selected allowing the user to set a relative date instead of a specific one

## 10. Exporting Recipient from a Subscription List

You are able to export the list of users that have a specific permission level within a date range.

1. Select the desired option
2. Click on " Save and export as .csv"

You can now pick which fields you want included in the file and can also add permission data for specific subscriptions.

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# 11. Select the Fields for Export

Export to .CSV ×

What fields would you like to include in the .CSV file?

19 field(s) selected

☒ Check all ☒ Uncheck all ×

☐ Email(Unique ID)

☒ FirstName

☒ LastName

☒ Address

☒ City

☒ Province

☒ PostalCode

☒ BirthMonthYear

Permission information?

when it's completed?

- You can select any field you would like to have included in your export by checking or unchecking the field list.

---

# 12. Include permission level in the Export

What fields would you like to include in the .CSV file?

19 field(s) selected



Would you like to include each contact's permission information?

☐ Yes ☒ No

Would you like us to send an email notification when it's completed?

☐ Yes ☒ No

Export

Cancel

In order to include , the permission information in your export , please follow the below steps :

1. Check the "yes" radio button
2. Make sure the desired subscription is selected.
3. Finally, click on Export.

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Revision #2

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