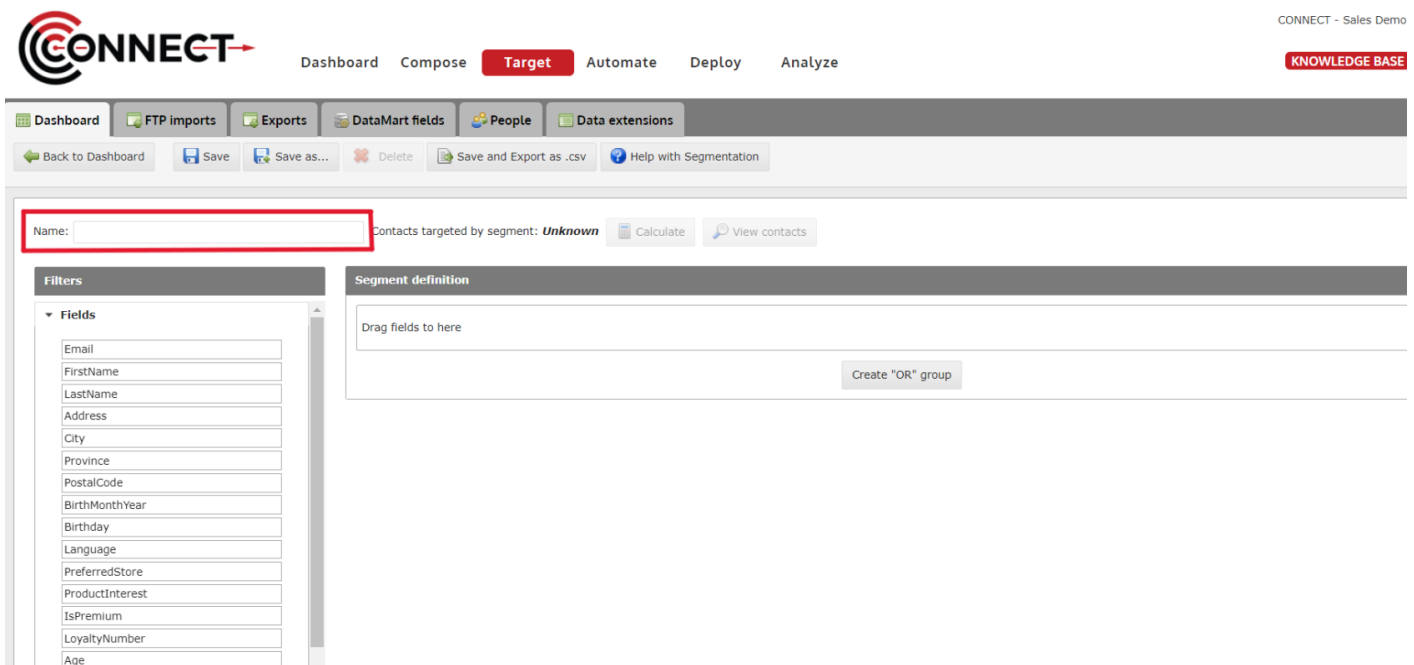


How to Target Contacts Based on their Permission Level

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 'Name' field is highlighted with a red box. The 'Segment definition' section is visible, showing a list of fields to be dragged into the definition area.

CONNECT - Sales Demo

Dashboard Compose **Target** Automate Deploy Analyze

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 Equals Subscribed Add Date Range

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 Equals **Subscribed** [Add Date Range](#) ✕

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 Equals Subscribed [Add Date Range](#) ✕

Subscribed includes Express, Implied and Double Opt-in

[Create "OR" group](#)

7. Select when it was Last Updated

Segment definition

Newsletter Permission

Equals

Double Opt-In

✖

Permission Capture Date

Specific

Equals

Define time

Create "OR" group

8. Date Picker

Segment definition

Newsletter Permission

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				

9. "Relative" Date Option

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

Newsletter Permission

Equals

Double Opt-In

✖

Permission Capture Date

Relative

Equals

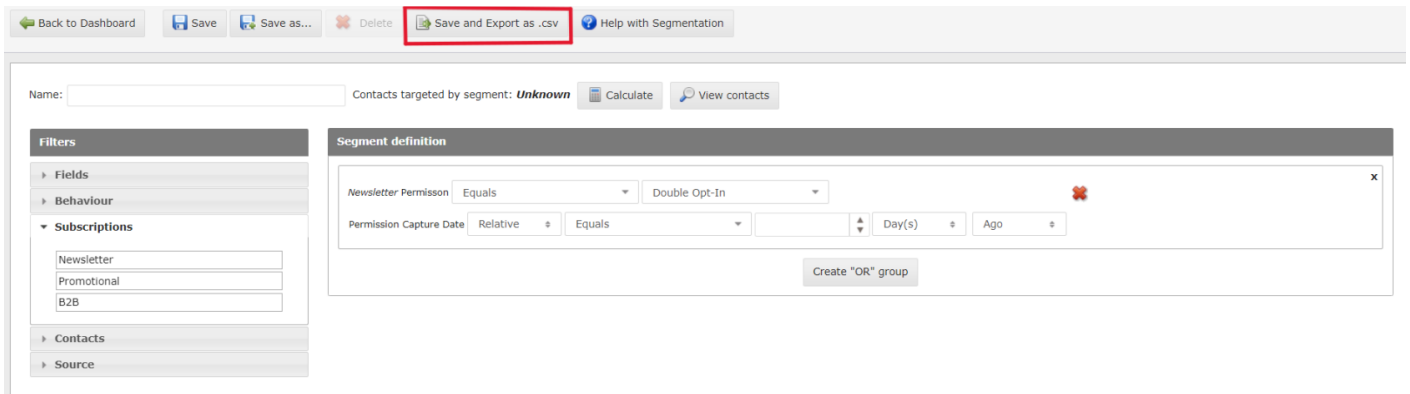
Day(s)

Ago

Create "OR" group

- 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



The screenshot shows a CRM interface with a top navigation bar containing buttons: 'Back to Dashboard', 'Save', 'Save as...', 'Delete', 'Save and Export as .csv' (highlighted with a red box), and 'Help with Segmentation'. Below the navigation bar, there is a 'Name:' field and a 'Contacts targeted by segment: Unknown' label. To the right of the label are 'Calculate' and 'View contacts' buttons. On the left, there is a 'Filters' sidebar with expandable sections: 'Fields', 'Behaviour', 'Subscriptions' (expanded), 'Contacts', and 'Source'. The 'Subscriptions' section lists 'Newsletter', 'Promotional', and 'B2B'. The main area is titled 'Segment definition' and contains a rule builder. The first rule is 'Newsletter Permission' with a dropdown set to 'Equals' and another dropdown set to 'Double Opt-In'. Below this, there is a second rule: 'Permission Capture Date' with a dropdown set to 'Relative', a dropdown set to 'Equals', and a date range selector with 'Day(s)' and 'Ago' fields. A 'Create "OR" group' button is located at the bottom right of the rule builder area.

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.

11. Select the Fields for Export

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.

Revision #2

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