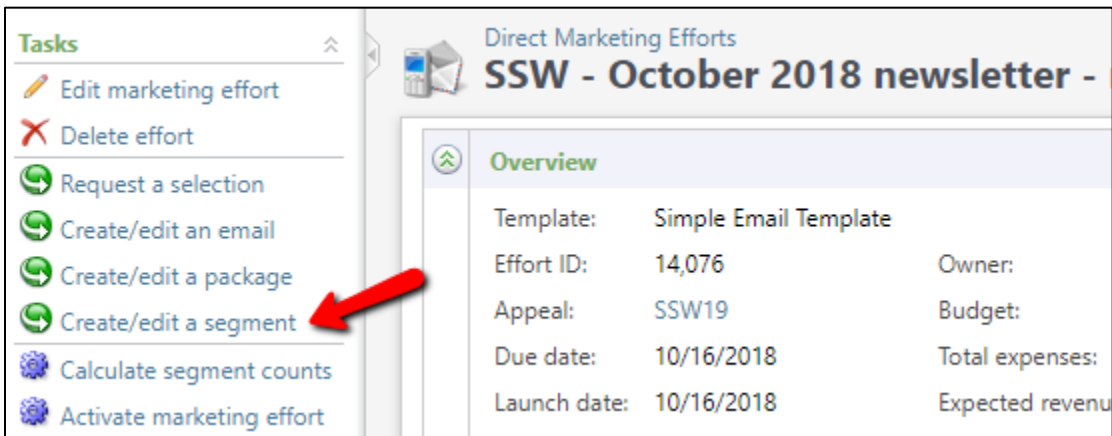


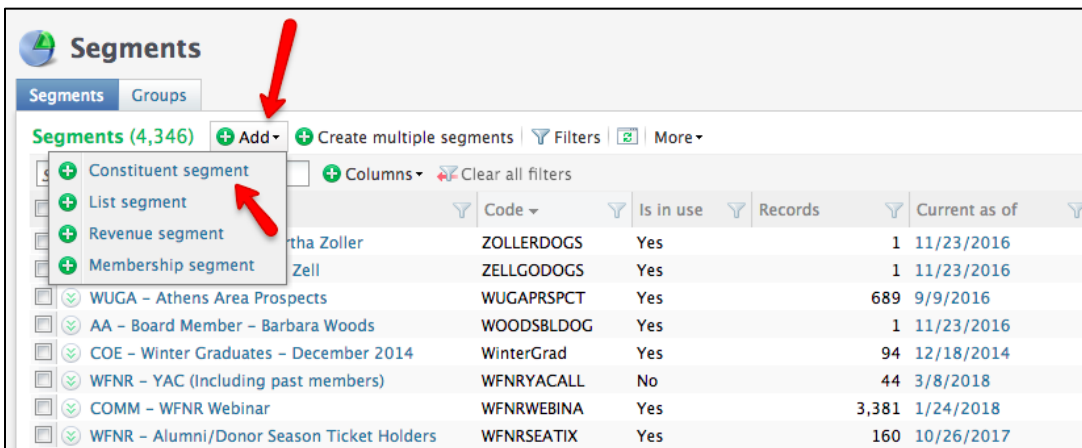
How to Create a Segment

Important Note: This process should *only* be completed if you have been provided with a newly created selection. Once a segment contains a specific selection, you can use it in multiple future marketing efforts.

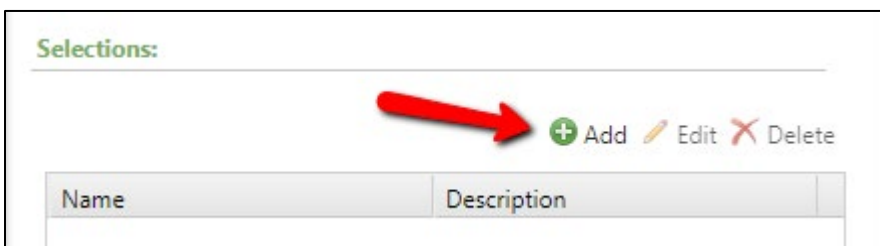
Step 1. In your marketing effort tasks bar, click **Create/edit a segment**.



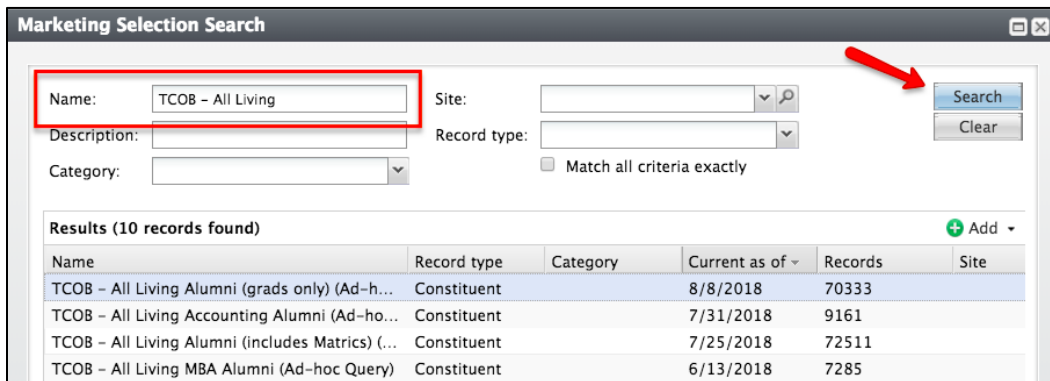
Step 2. At the top of the new page, click the **Add** button and choose **Constituent Segment**.



Step 3. When the new pop-up window appears, click the **Add** button underneath the selections header.



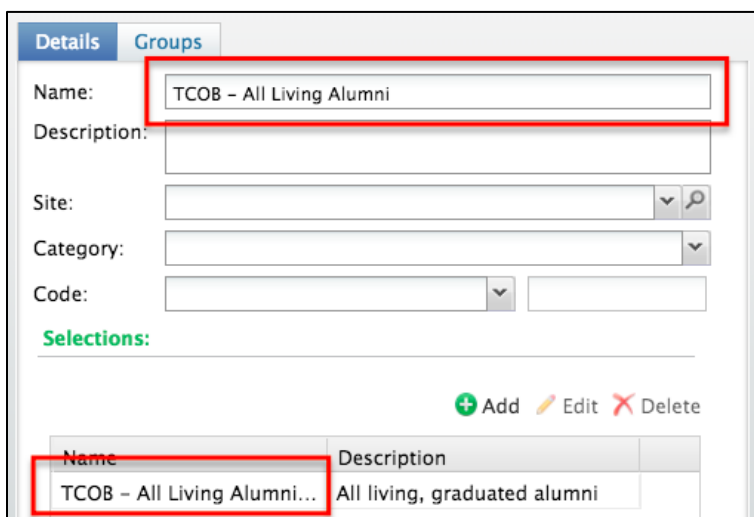
In the name field, search for and choose the name of your selection. The name of your selection will have been provided to you by the Query team via email and it will begin with your naming convention.



The screenshot shows a 'Marketing Selection Search' window. The 'Name' field contains 'TCOB - All Living' and is highlighted with a red box. A red arrow points to the 'Search' button. Below the search fields is a table of results with 10 records found.

Name	Record type	Category	Current as of	Records	Site
TCOB - All Living Alumni (grads only) (Ad-hoc Query)	Constituent		8/8/2018	70333	
TCOB - All Living Accounting Alumni (Ad-hoc Query)	Constituent		7/31/2018	9161	
TCOB - All Living Alumni (includes Matrics) (Ad-hoc Query)	Constituent		7/25/2018	72511	
TCOB - All Living MBA Alumni (Ad-hoc Query)	Constituent		6/13/2018	7285	

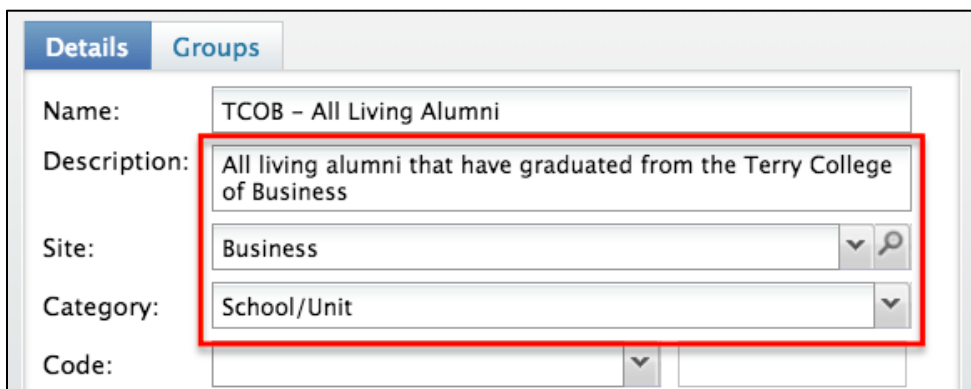
Step 4. Once you have chosen your selection from the results list, name your segment to match.



The screenshot shows the 'Details' tab of the 'Marketing Selection Search' window. The 'Name' field contains 'TCOB - All Living Alumni' and is highlighted with a red box. Below the search fields is a table of selections with 1 record found.

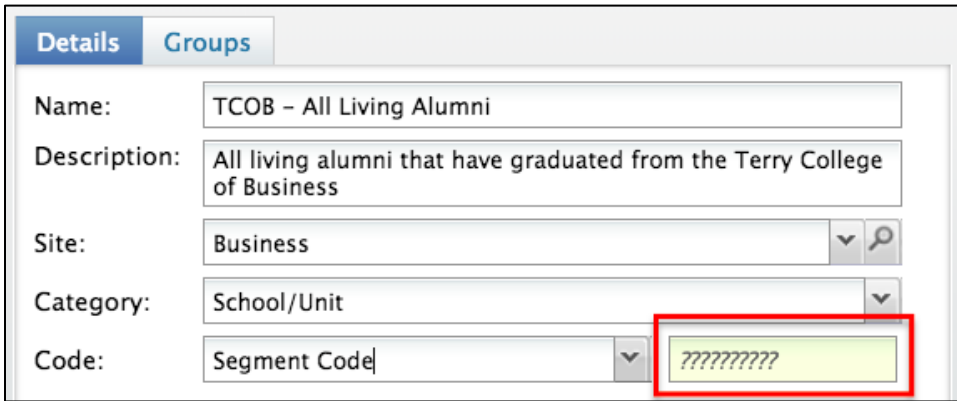
Name	Description
TCOB - All Living Alumni...	All living, graduated alumni

Step 5. Enter a brief description that defines the constituents in your segment. Then, choose your school/college/unit from the *Site* drop-down menu. For the *Category*, you will always choose *School/Unit*.



The screenshot shows the 'Details' tab of the 'Marketing Selection Search' window. The 'Name' field contains 'TCOB - All Living Alumni'. The 'Description' field contains 'All living alumni that have graduated from the Terry College of Business'. The 'Site' dropdown menu is set to 'Business' and the 'Category' dropdown menu is set to 'School/Unit'. Both the description and site fields are highlighted with a red box.

Step 6. Choose, **Segment Code** from the *Code* drop-down menu. In the yellow highlighted field, enter a **10-digit** code consisting of letters and numbers. The code should always begin with your naming convention and current fiscal year. (ex. TCOB19ALUM, COE18DONOR)



Details Groups

Name: TCOB - All Living Alumni

Description: All living alumni that have graduated from the Terry College of Business

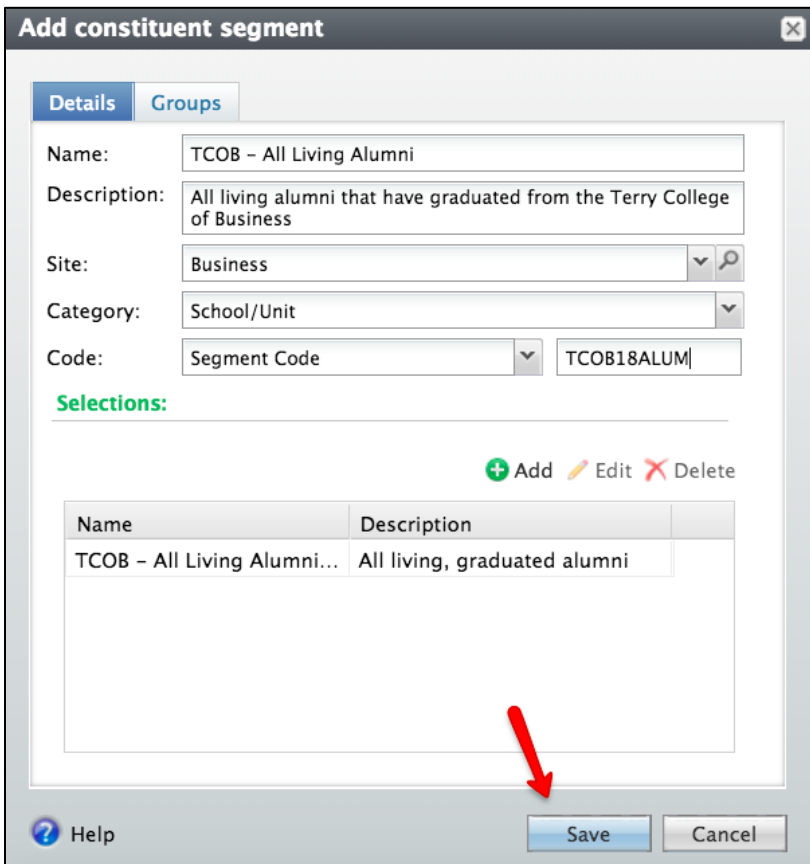
Site: Business

Category: School/Unit

Code: Segment Code

?????????

Step 7. When you have entered a complete 10-digit code, the yellow highlighted field will turn white. Click **Save** when you are finished.



Add constituent segment

Details Groups

Name: TCOB - All Living Alumni

Description: All living alumni that have graduated from the Terry College of Business

Site: Business

Category: School/Unit

Code: Segment Code

TCOB18ALUM

Selections:

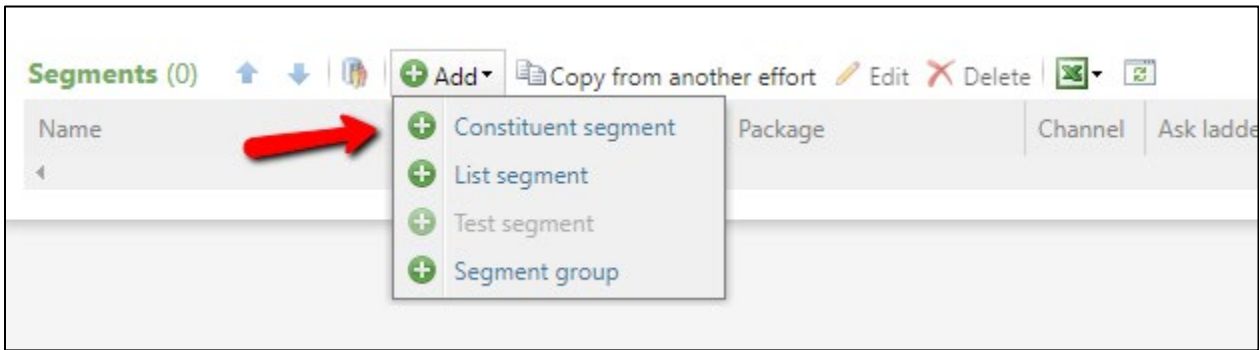
+ Add Edit Delete

Name	Description
TCOB - All Living Alumni...	All living, graduated alumni

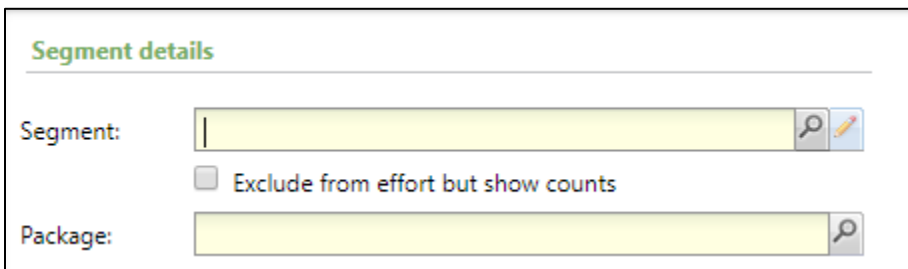
Help Save Cancel

Important Note: If you requested more than one new selection to be created, you will need to repeat this process until you have a corresponding segment for each selection.

Step 8. In the Segments section of your DME Dashboard tab, click **Constituent segment**.



Step 9. In the Segments field, search for and select the **Segment** that you just created in Step 4. Then search for and select the name of your **Package**. (Your package name should be identical to your marketing effort.) Click **Save** when you have completed both these fields.

A screenshot of a form titled 'Segment details'. It contains two search fields: 'Segment:' and 'Package:'. Both fields are highlighted in yellow. Below the 'Segment:' field is a checkbox labeled 'Exclude from effort but show counts' which is unchecked. There are search and edit icons to the right of each field.

Important Note: If you need to add more than one segment to your marketing effort, repeat steps 8-9.

If you have any questions about this instructional guide, or need additional assistance, please contact the Client Services team at askit@uga.edu

This document was last updated on 5/20/19.