evo-auction

Segments

User guide

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BCN

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1.1 SEGMENTS

Segments is a marketing tool, which divides contacts into mailing groups based on their location, relations or behaviour towards auctions. As long as the information is held within Evo-auction it is possible to report on it. There are many ways, in which contacts can be segmented. Mailing group can be used to e-mail or post any important information or advert.

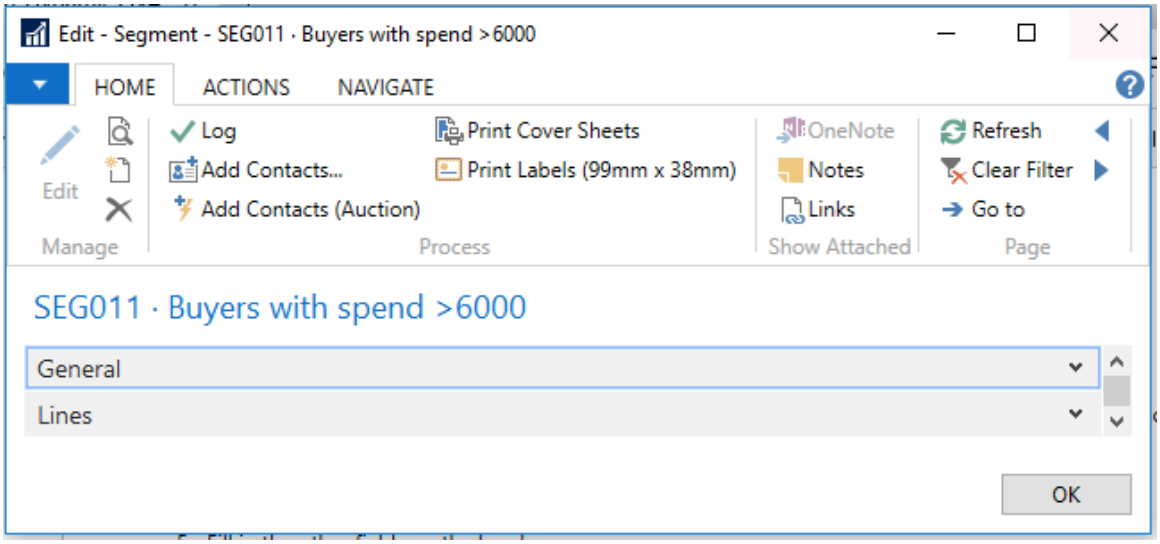
CREATE NEW SEGMENT

You can create segments to select a group of contacts, for example, if you want to create an interaction involving several contacts, such as direct mail.

To create new Segment:

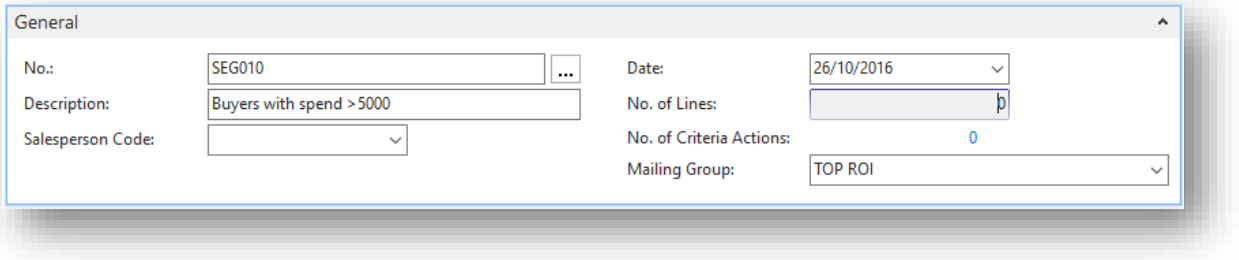
1. In the Search box enter **Segments**, and then choose the related link.
2. Select **New** from the Ribbon.

   The **Segment** window opens.



GENERAL FASTTAB

The General FastTab contains information about the segment and the interaction you have created for the segment.

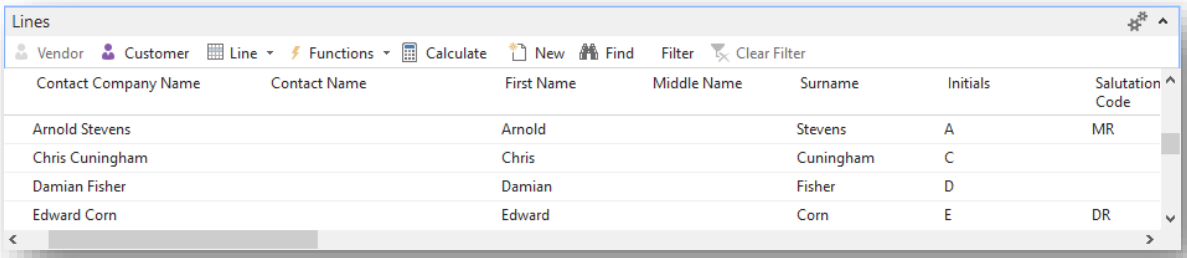


Field name	Type	Description
No.	Unique ID	Automatically generated from a number series.
Description		Enter description for the segment.
Salesperson Code	Lookup	Select segment administrator.
Date	Lookup	Current date is assign by default.
No. of Lines	Flowfield	Displays number of lines in current segment.
No. of Criteria Actions	Flowfield	Displays number of criteria applied. Click on the number to view all criteria applied to the segment.
Mailing Group	Lookup	Select Mailing List to add to the segment. This filter will be applied on the **Contact Mailing Group FastTab** when **Add Contacts** run.

LINES FASTTAB

The Lines FastTab contain specific information about the contacts within the segment.

If you have personalized the interaction for a specific contact, it appears on the segment line. There is a line for each contact within the segment.



ADD CONTACTS TO SEGMENT

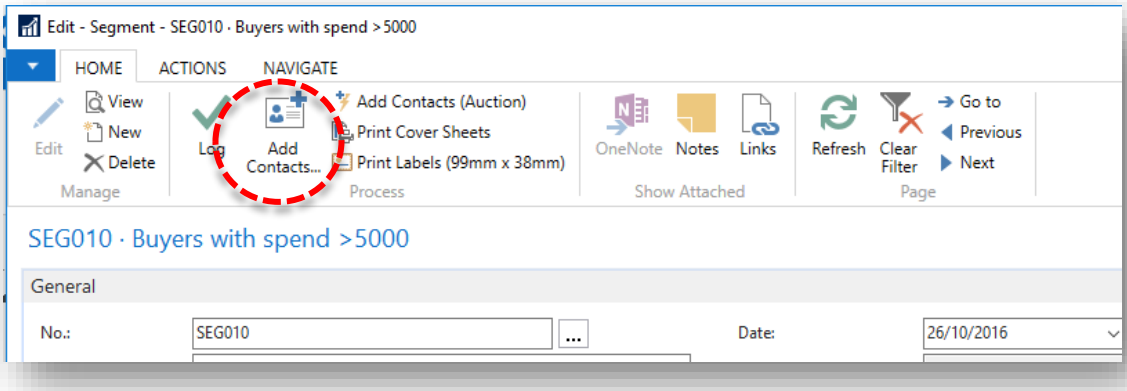
After you have created a segment and entered general information about it, you may want to add contacts to the segment.

You can do this by filling in the lines in the segment window manually, but it is easier and faster to use the **Add Contacts** or **Add Contacts (Auction)** function.

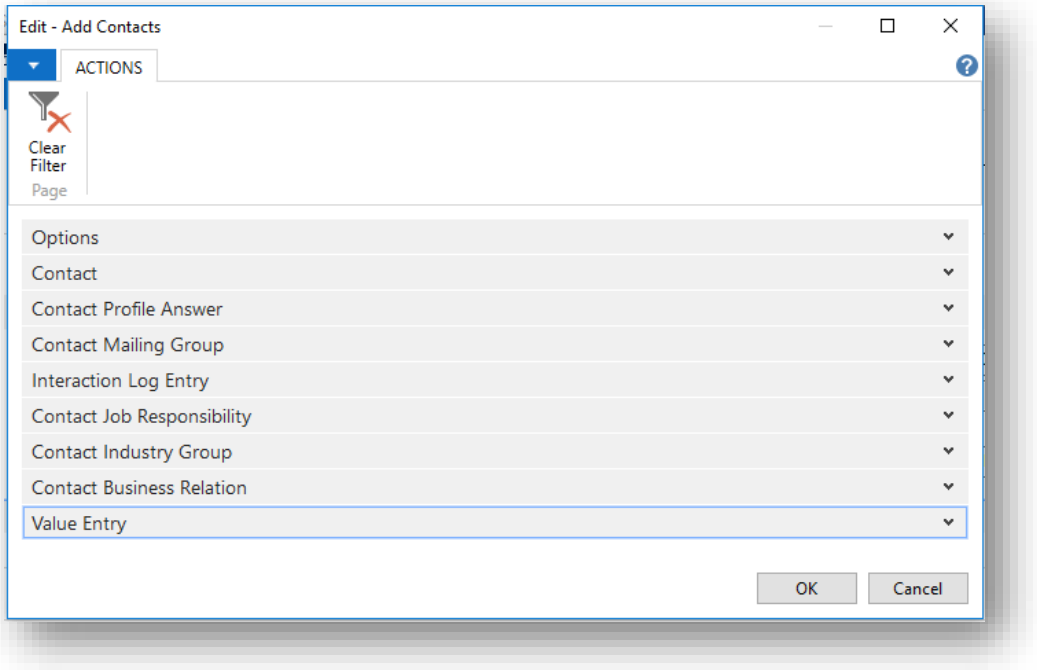
ADD CONTACTS

Use this filter to find contacts using criteria not related to auctions such as Mailing Groups.

1. Select **Add Contacts** from the Ribbon.

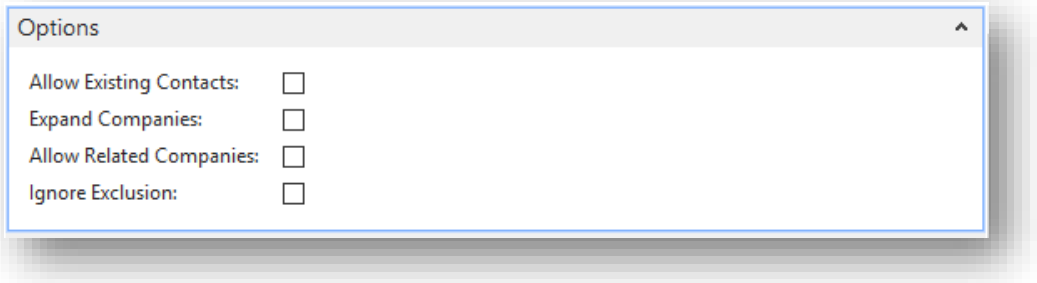


The **Add Contacts** batch job window opens.



Contacts can be segmented in many ways. To add contacts to the segment, apply criteria within filter groups.

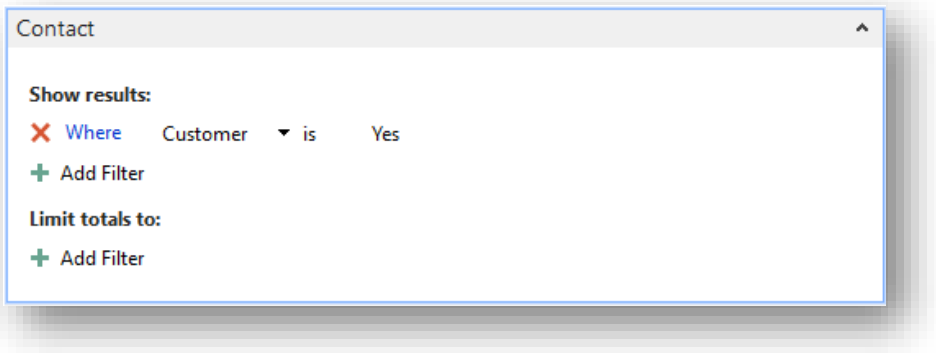
OPTIONS FASTTAB



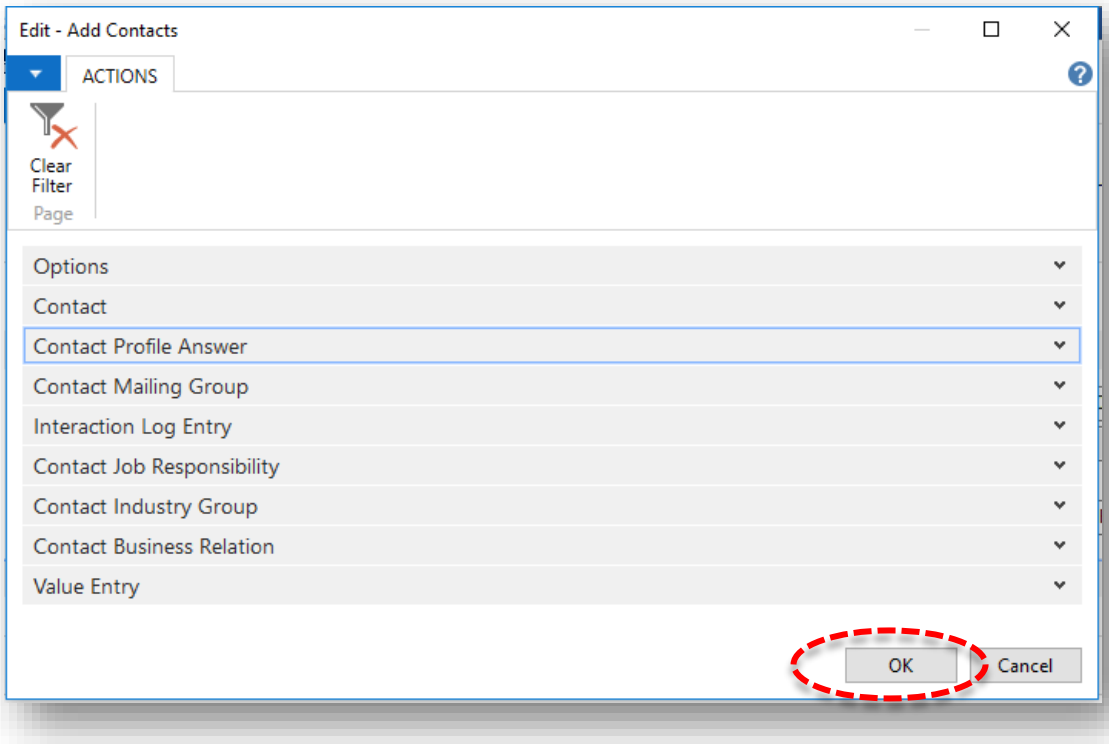
Field name	Type	Description
Ignore Exclusion	Tickbox	Select to include all contacts, even if they are marked to exclude from segments.

CONTACT FASTTAB

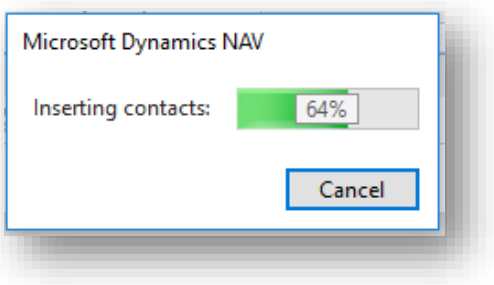
Set filters to specify the information by which you want to select contacts.



2. When all criteria applied, select **OK** to add contacts to the segment.



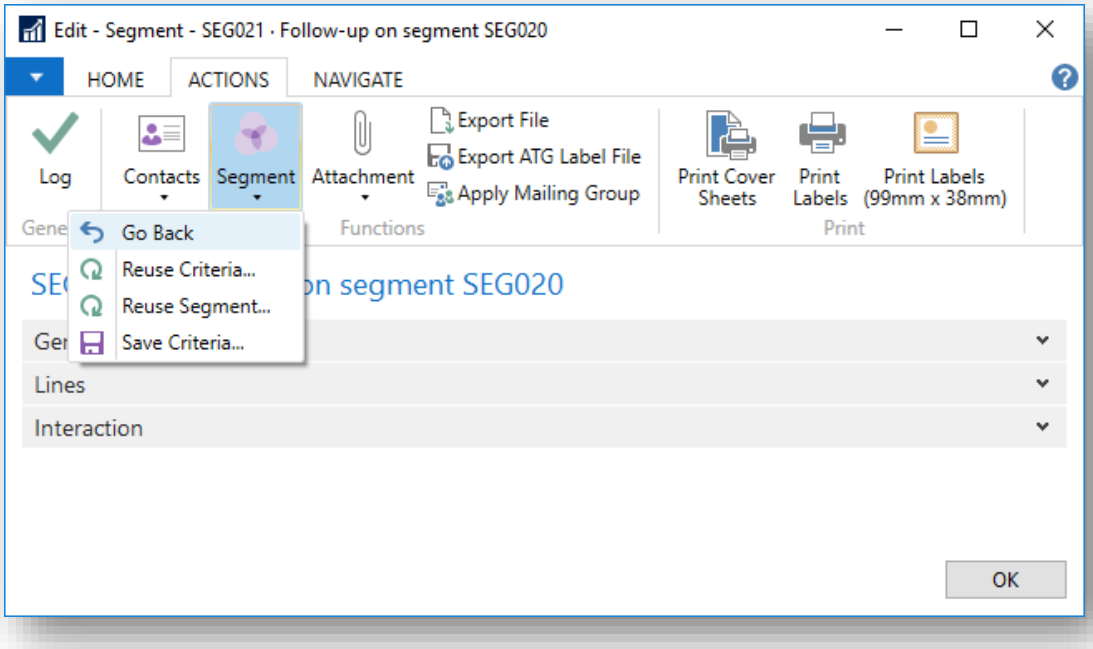
This will activate inserting process. Part of inserting process is checking for duplicated lines, which are automatically eliminated.



To enter additional filters, repeat this procedure on each of the remaining FastTabs.

NOTE

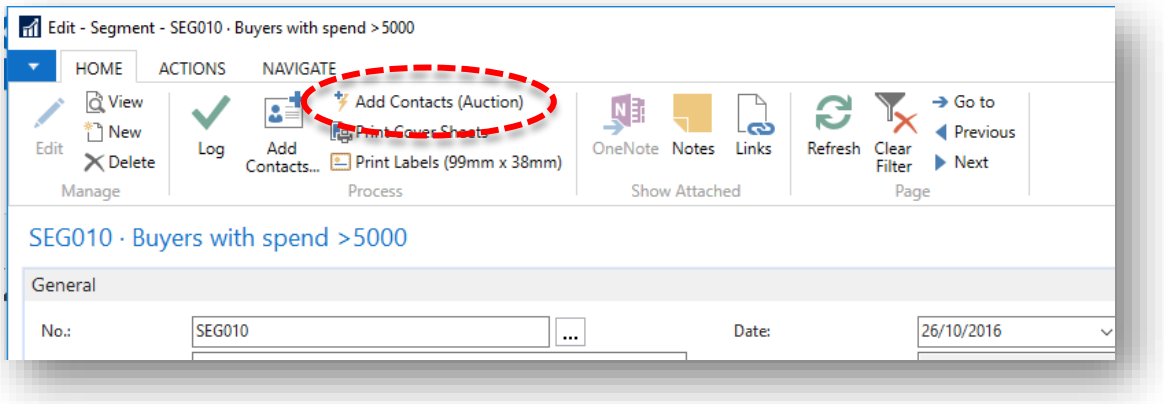
If you have added contacts by mistake and want to go back one step, select **Segment**, and then choose **Go Back** from the Ribbon.



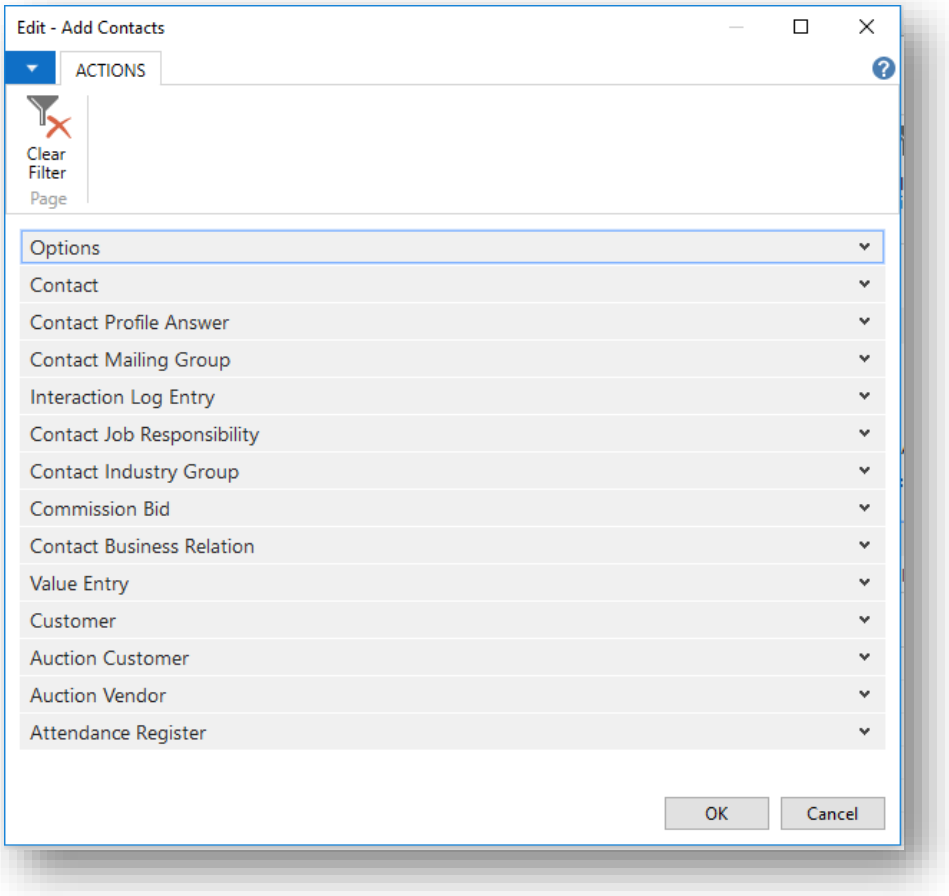
ADD CONTACTS (AUCTION)

Use this filter to find auction contacts using criteria related to auctions.

1. Select **Add Contacts (Auction)** from the Ribbon.

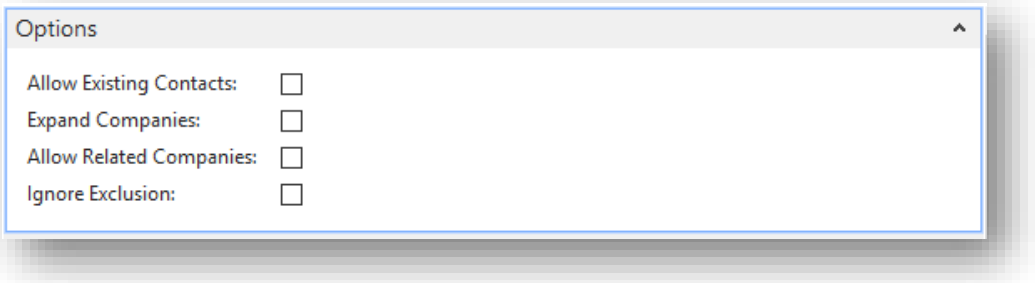


The **Add Contacts** batch job window opens.



To add contacts to the segment, apply criteria within filter groups.

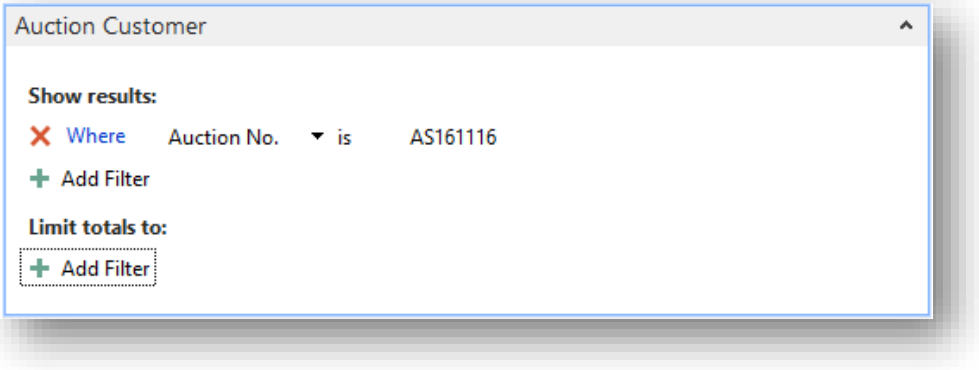
OPTIONS FASTTAB



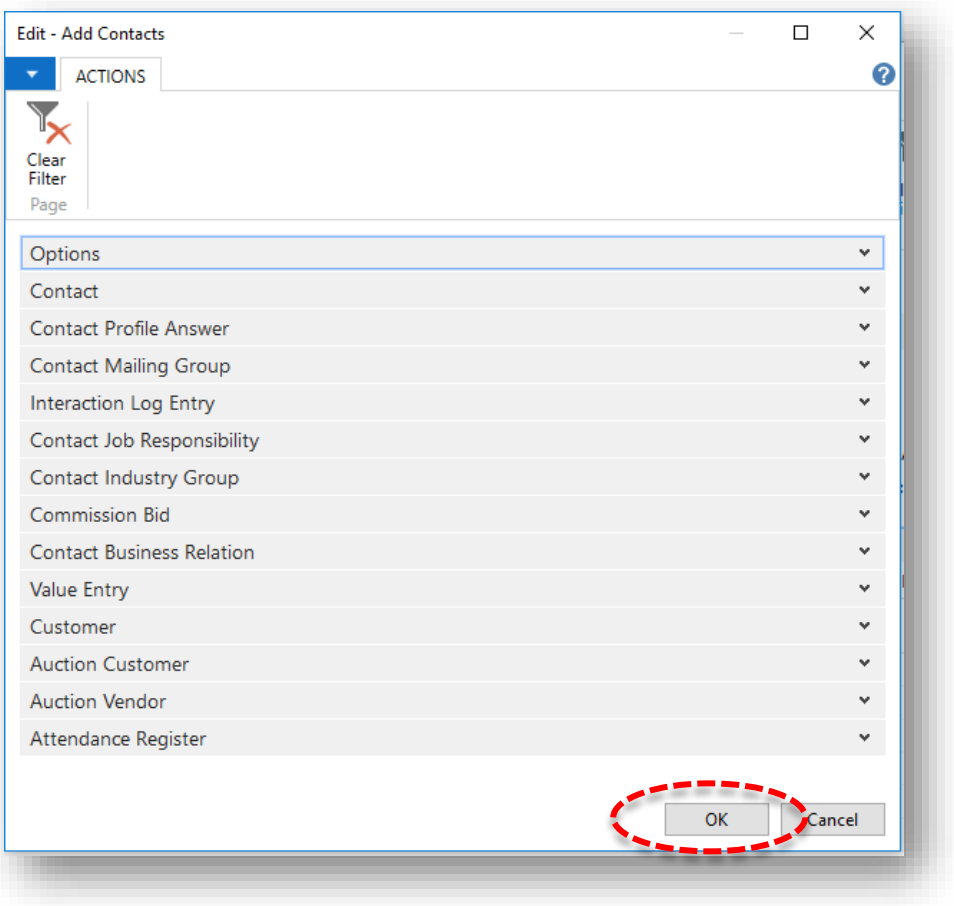
Field name	Type	Description
Ignore Exclusion	Tickbox	Select to include all contacts, even if they are marked to exclude from segments.

AUCTION CUSTOMER FASTTAB

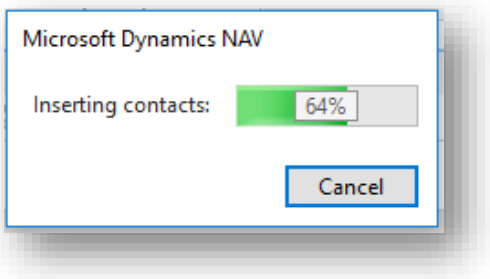
Set filters to specify information by which you want to select contacts.



2. When all criteria applied, select **OK** to add contacts to the segment.



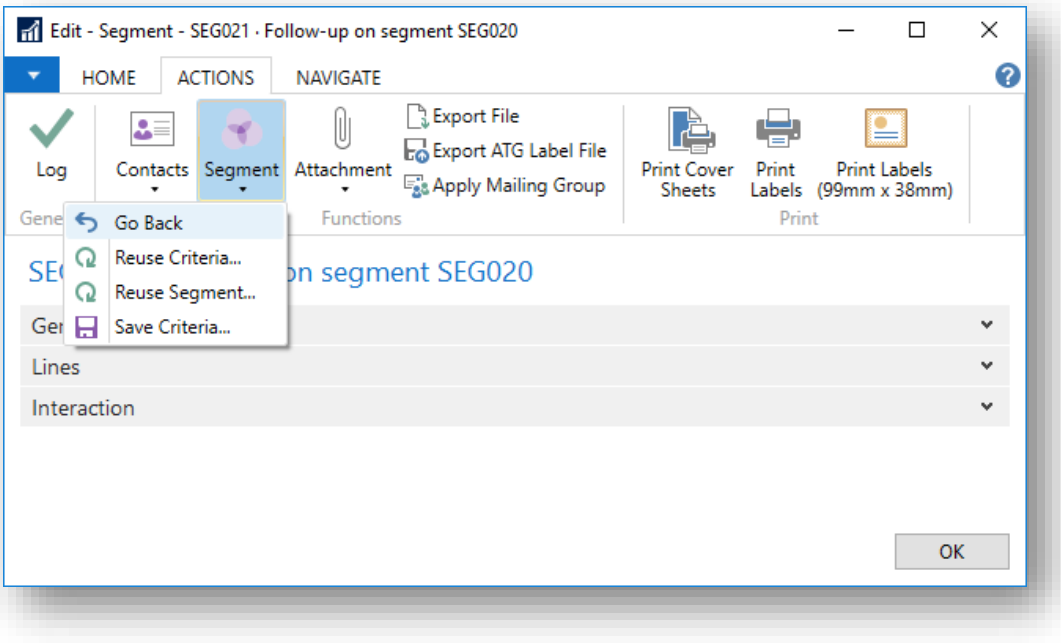
This will activate inserting process. Part of inserting process is checking for duplicated lines, which are automatically eliminated.



To enter additional filters, repeat this procedure on each of the remaining FastTabs.

NOTE

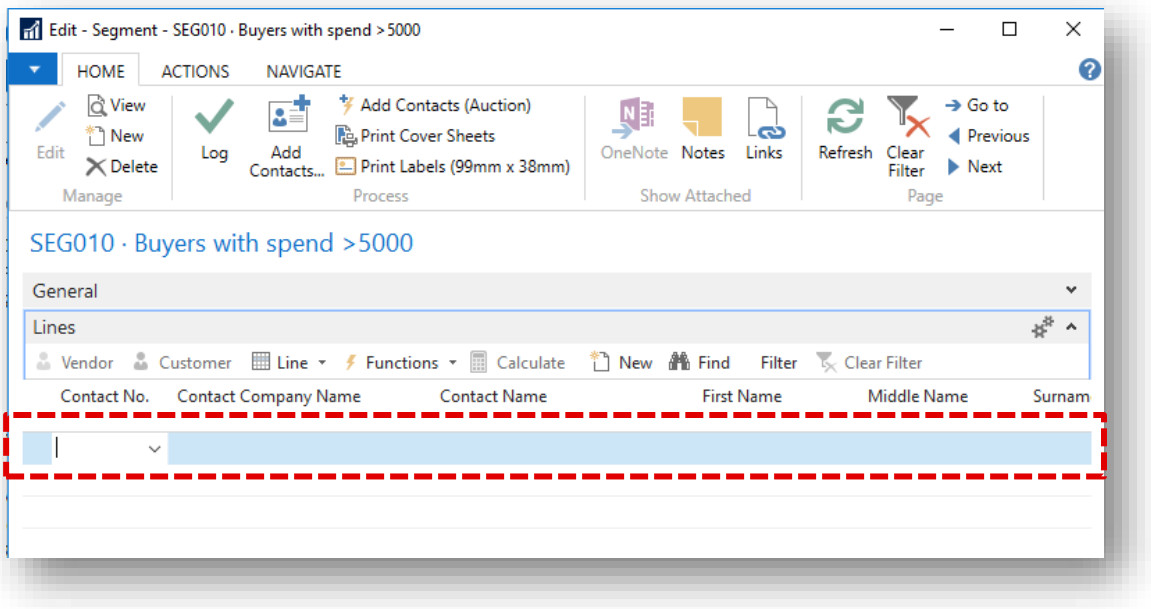
If you have added contacts by mistake and want to go back one step, select **Segment**, and then choose **Go Back** from the Ribbon.



ADD CONTACTS MANUALLY

To add contact to a segment manually:

1. Open the segment and navigate to the **Lines FastTab**.
2. Go to new line and select contact from the list. Fill in the other fields on the line.



Repeat these steps to add as many contacts as you want.

EXAMPLES – ADD CONTACT (AUCTIONS)

BUYERS WITH TOTAL SPENT OVER £20.000

FastTab	Filter	Value
Contact	Customer	YES
Contact	Total Spent	20000..

BUYERS WITH TOTAL COMMISSION BIDS VALUE OVER £30.000

FastTab	Filter	Value
Contact	Customer	YES
Contact	Total Commission Bid Value	30000..

BUYERS FROM A SPECIFIC LOCATION

FastTab	Filter	Value
Contact	Customer	YES
Contact	City	Stansted

VENDORS WITH SOLD TOTAL OVER £5.000

FastTab	Filter	Value
Contact	Vendor	YES
Contact	Total Sold	5000..

VENDOR WITH SOLD TOTAL BETWEEN £5000-10000 IN MARCH 2015

FastTab	Filter	Value
Contact	Vendor	YES
Auction Vendor	Total Sold	5000..10000
Auction Vendor	Auction Date	010315..310315

BOOKS BUYERS FROM AUCTION NO. 7038

FastTab	Filter	Value
Contact	Customer	YES
Auction Customer	Auction No.	7038
Auction Customer	Category No	BOOK

SUCCESSFUL BUYERS FROM AUCTION 3108

FastTab	Filter	Value
Contact	Customer	YES
Auction Customer	Auction No.	3108
Auction Customer	Hammer Price	1..

ALL 'LALIQUE' BUYERS ABOVE £1000 IN YEAR 2015

FastTab	Filter	Value
Contact	Customer	YES
Auction Customer	Maker/Designer	Lalique
Auction Customer	Hammer Price	1001..
Auction Customer	Auction date	010115..311215

ALL FEMALE CUSTOMERS BUYING IN YEAR 2015

FastTab	Filter	Value
Contact	Customer	YES
Contact	Salutation Code	LADY|MISS|MRS|MS
Auction Customer	Auction date	010115..311215

EXAMPLES – ADD CONTACT

ALL CATALOGUE SUBSCRIBERS - WATCHES

FastTab	Filter	Value
Contact Mailing Group	Mailing Group Code	CAT-SUB-WA

CONTACTS ASSIGNED TO MAILING GROUP: EXHIBITION

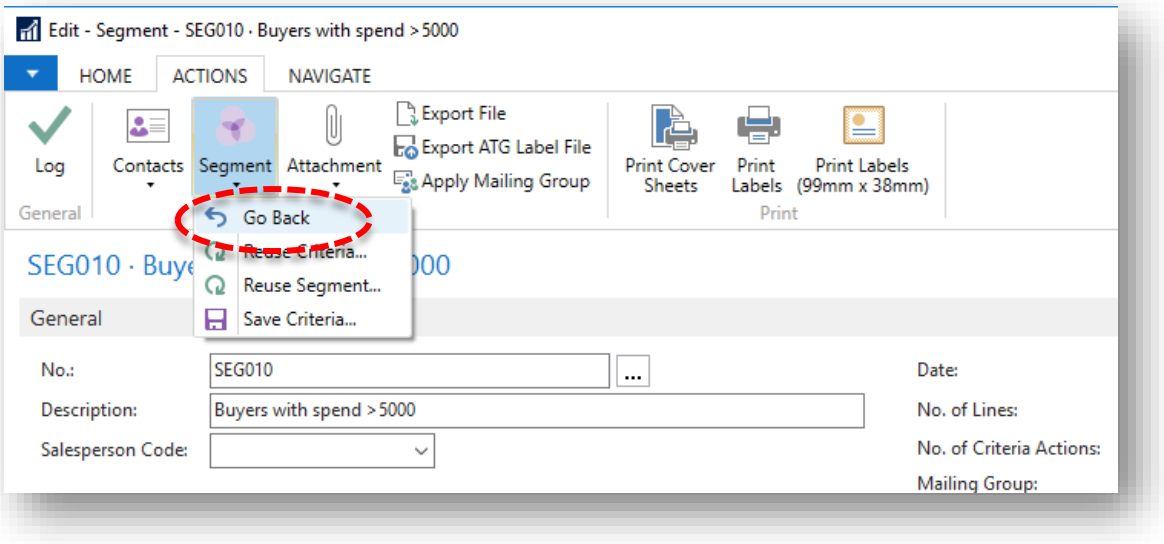
FastTab	Filter	Value
Contact Mailing Group	Mailing Group Code	EXHIBITION

REMOVING CONTACTS

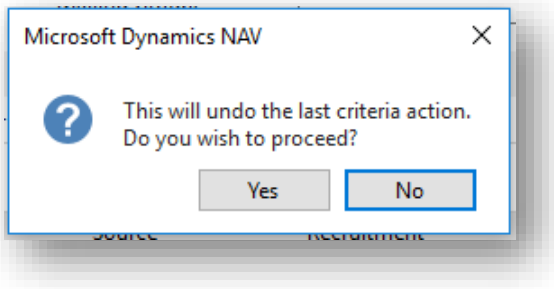
REMOVING LAST CRITERIA ACTION

If you have added contacts to a segment or removed contacts from a segment by mistake, you have the possibility to go one step back.

1. Open the segment, select **Segment** from the Ribbon, and then choose **Go Back**.



2. Select **Yes** to confirm.



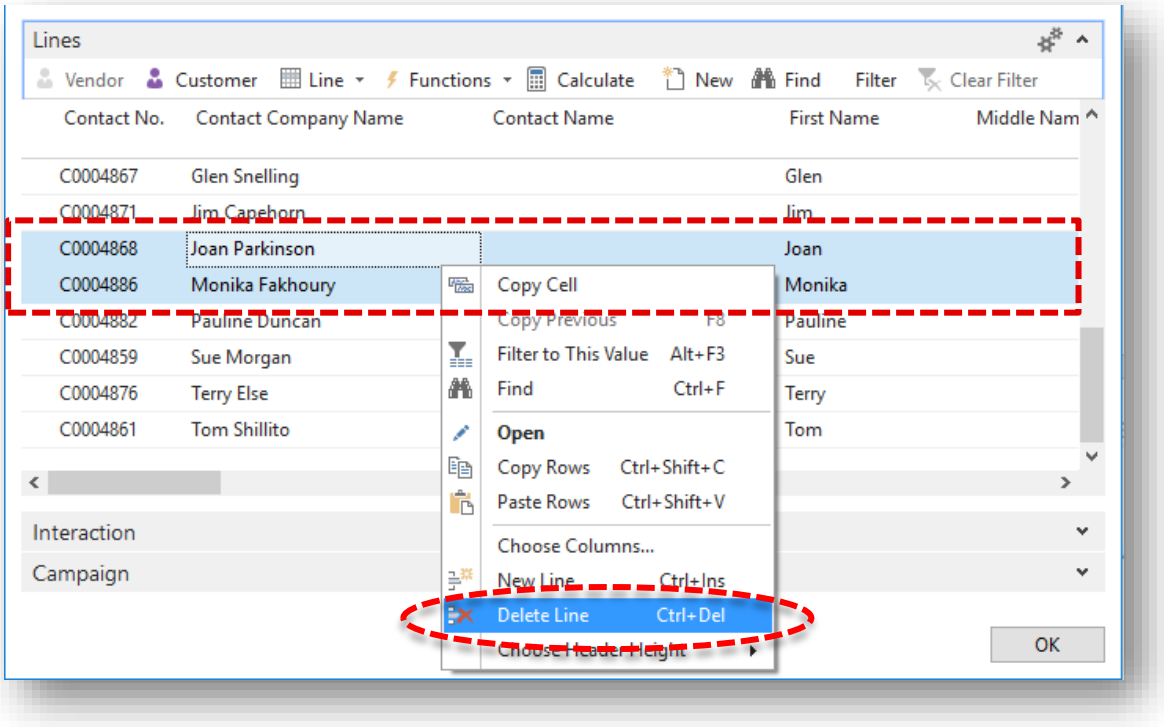
Wait for process to finish.

NOTE
When you click **Go Back**, the program can only go back to the previous step and no further.

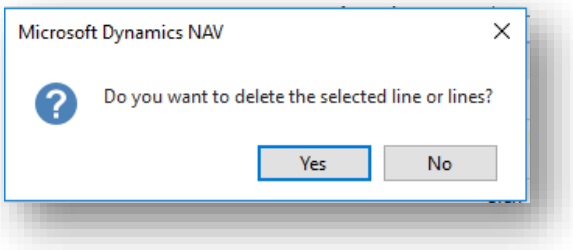
REMOVING PARTICULAR LINE(S)

If you want to delete single contact line from a segment:

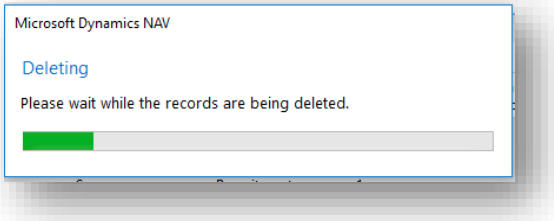
1. Highlight the line(s), and right click to open **Line** menu.
   Select **Delete Line** from the list.



2. Select **Yes** to confirm.



3. Wait for process to finish.



NOTE
To highlight all contacts included in a segment, click anywhere in the Lines FastTab and use Ctrl+A key.

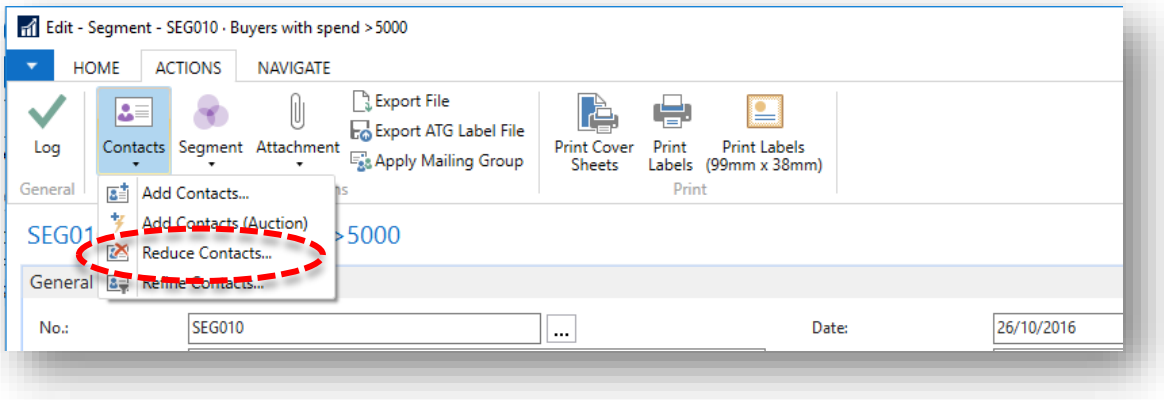
REDUCING CONTACTS

After you have selected contacts within a segment, you may want to remove some of them. You can do this by manually removing them from the lines in the segment window, but it is easier and faster to use the **Reduce Contacts** function to specify which contacts to remove, or to use the **Refine Contacts** function to specify which contacts to keep.

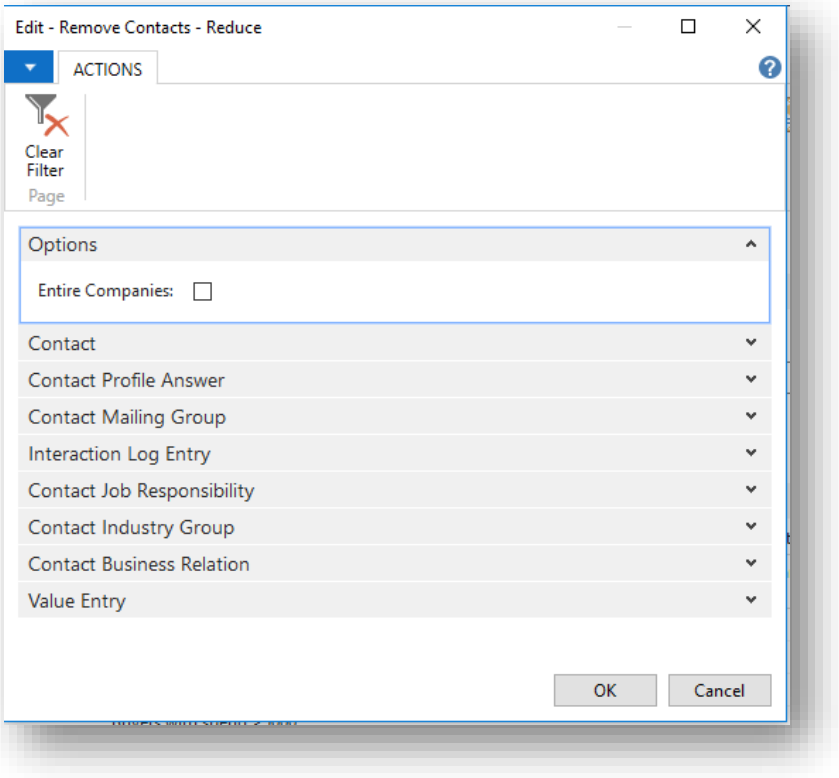
You can reduce a segment as many times as you want.

To specify which contacts to remove:

1. Open a segment, select **Contacts** from the Ribbon, and then choose **Reduce Contacts**.



The **Remove Contacts - Reduce** window opens.



2. On the **Contact FastTab**, enter filters to specify the information that you want to use to select the contacts to be removed from the segment.
3. On each of the remaining FastTabs, enter one or more additional filters, and then choose the **OK** button.

EXAMPLE:

Your segment is filled in with a list of successful buyers within last year, but you have decided to remove all buyers assigned to Mailing Group ‘Ambassador’.

Open the segment, select **Contacts** from the Ribbon and then choose **Reduce Contacts**.

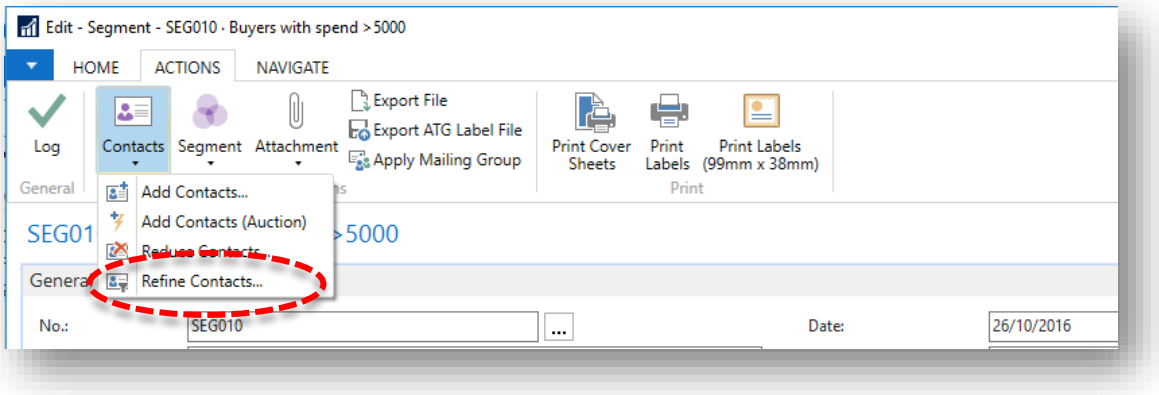
Navigate to the **Contact Mailing Group FastTab**, and apply filter ‘Mailing Group Code’ with value ‘AMBASSADOR’.

REFINING CONTACTS

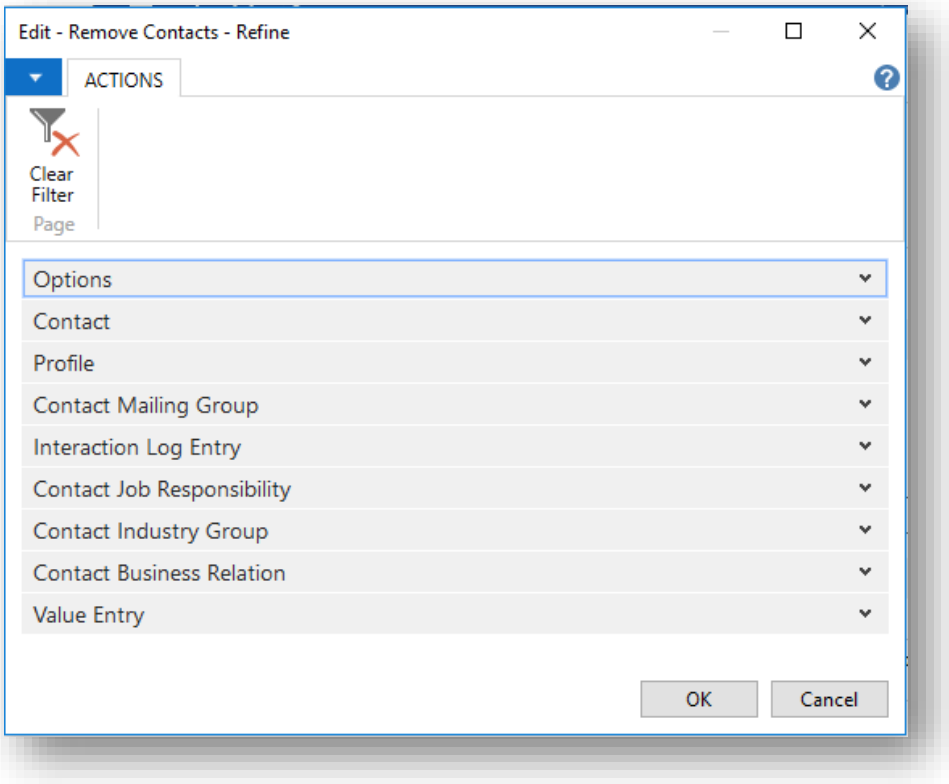
After you have selected contacts within a segment, you may decide to remove some but keep others. You can manually remove contacts from the lines in the segment window, but it is easier and faster to use the **Refine Contacts** function. You can refine a segment as many times as you want.

Use the **Refine Contacts** function to specify which contacts to keep.

1. Open the segment, select **Contacts** from the Ribbon and then choose **Refine Contacts**.



The **Remove Contacts - Refine** window opens.



2. On the **Contact FastTab**, enter filters to specify information you want to use to select contacts to be removed from the segment.
3. On each of the remaining FastTabs, enter one or more additional filters, and choose the **OK** button.

EXAMPLE

Your segment is filled in with vendors with sold total between £5000-10000 within last year, but you have decided to keep only vendors from Surrey.

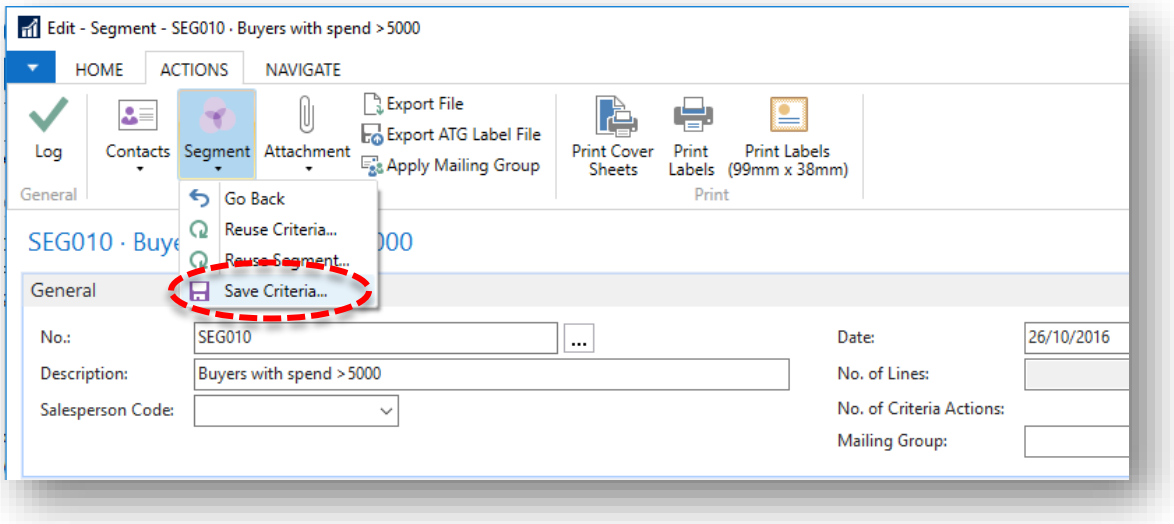
Open the segment, select **Contacts** from the Ribbon and then choose **Refine Contacts**.

Navigate to the **Contact FastTab**, enter filter 'County' with value 'SURREY'.

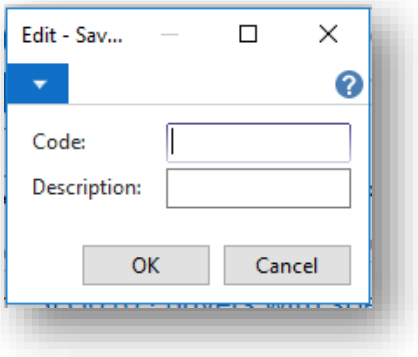
SAVE CRITERIA

After you have selected all contacts you want to include in your segments, you may want to save the segmentation criteria. You can then reuse these criteria to create new segments.

1. Open segment you want to save criteria from.
2. Select **Segment** from the Ribbon, and then choose **Save Criteria**.



3. In the **Code** field, enter a code for the criteria, and in the **Description** field, enter a description for the criteria.



4. Select **OK** to save criteria.

Now criteria are saved and ready to reuse.

CREATE SEGMENT BY REUSING CRITERIA

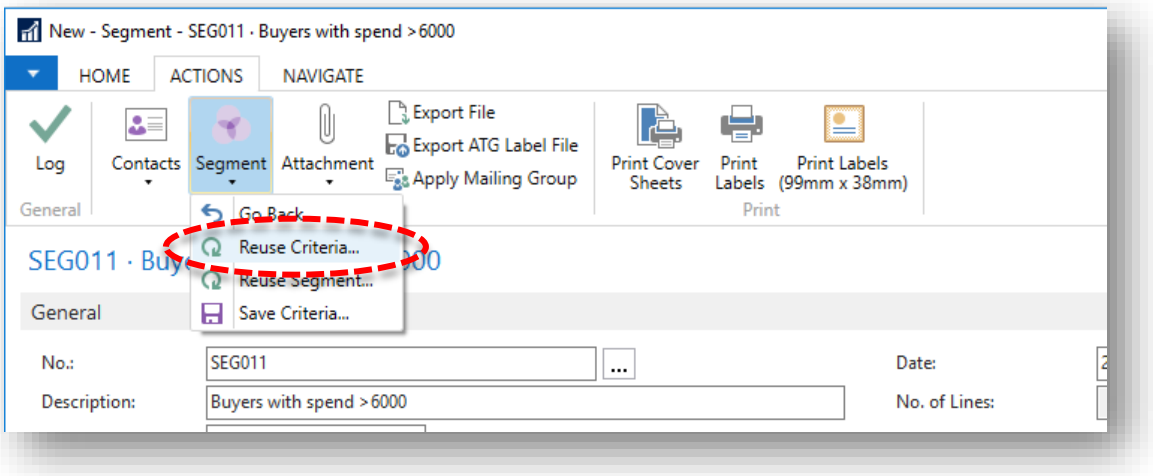
You can reuse saved criteria to create a new segment.

The newly created segment does not necessarily contain the same contacts as the other segment. It contains an updated list of contacts matching the same segmentation criteria.

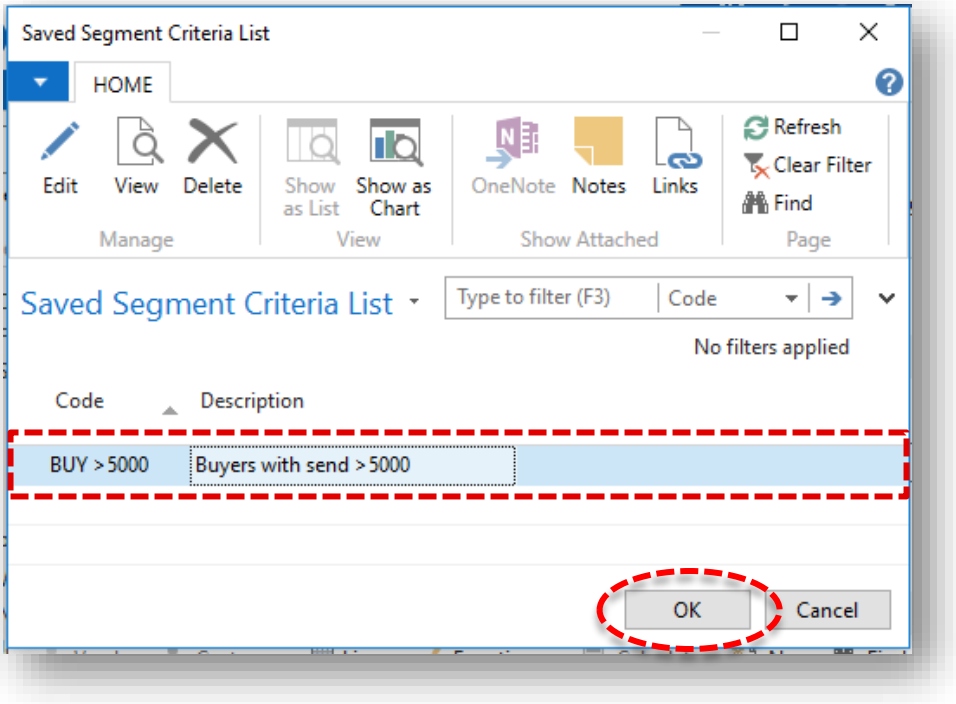
If you want to create a segment containing the exact same contacts as another Logged Segment, use the **Reuse Segment** function instead.

To reuse previously saved criteria:

1. Create new segment, select **Segment** from the Ribbon, then choose **Reuse Criteria**.



2. The **Saved Segment Criteria List** window opens.
   Select segmentation criteria that you want to reuse to create your segment, and choose the **OK** button.



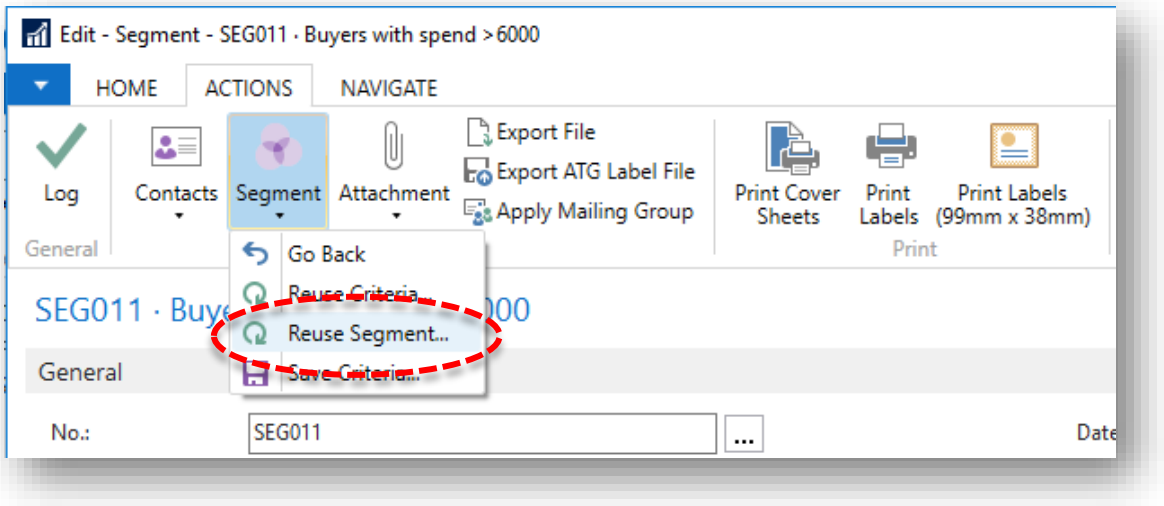
Wait for process to finish.

The segment lines are now filled in with contacts currently fulfilling the segment criteria.

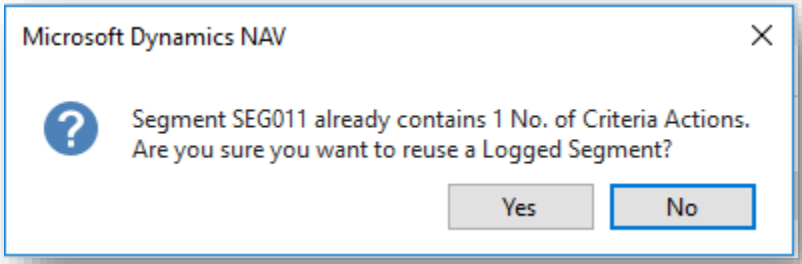
CREATE SEGMENT BY REUSING LOGGED SEGMENT

After you have logged a segment, you can create new segment containing the exact same contacts as the Logged segment. For example, after sending information to a group of contacts, you may want to send these contacts additional information, as follow-up action for a Campaign.

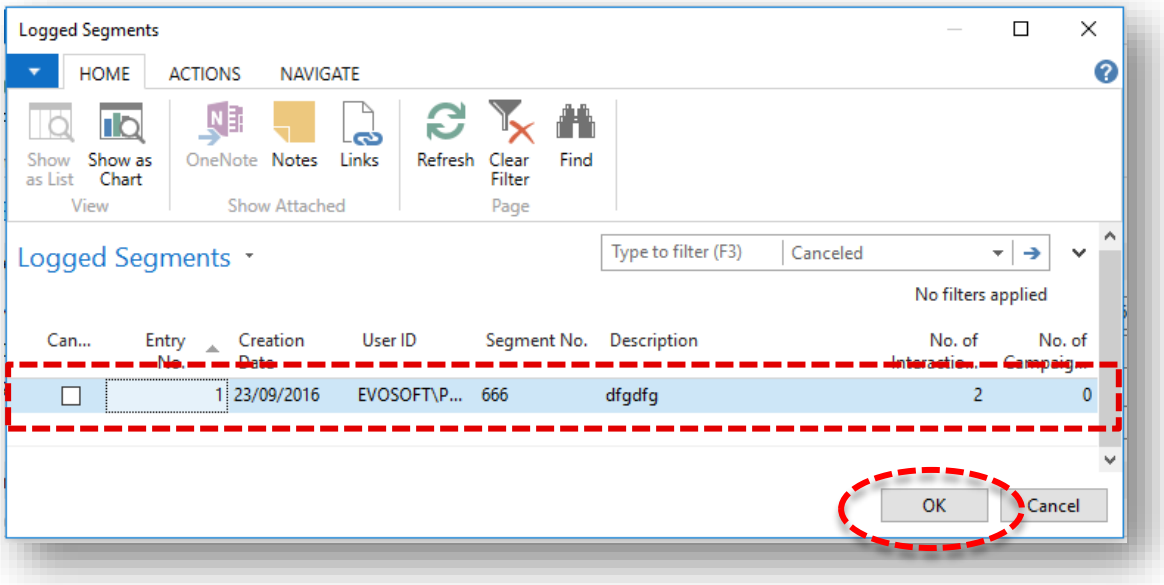
1. Create new segment, select **Segment** from the Ribbon, then choose **Reuse Segment**.



2. Select **Yes** to confirm.



3. The **Logged Segment** window opens.
   Select a Logged Segment containing the contacts that you want to add to your segment, and choose the **OK** button.



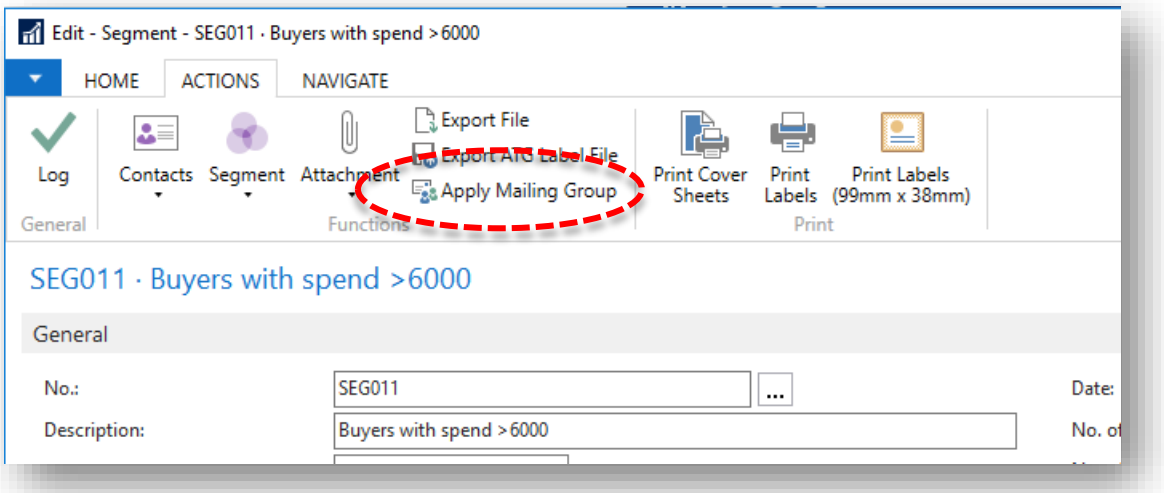
The segment lines are now filled in with the same contacts as selected Logged Segment.

APPLYING MAILING GROUP

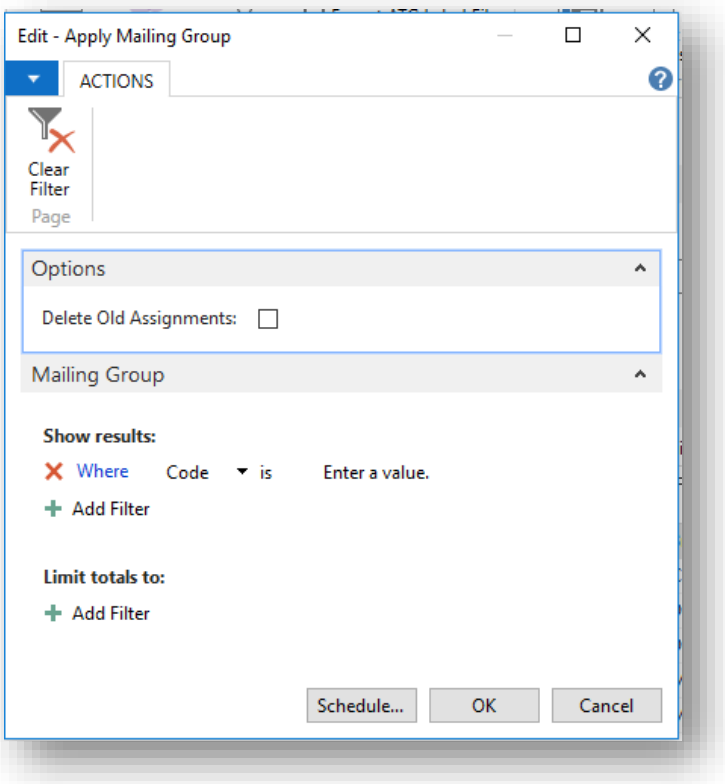
You can assign a Mailing Group to list of contacts that share the same characteristics, by creating segment and applying a Mailing Group to it.

Before you apply Mailing Group to segments, you must set up a Mailing Group.

1. Open the segment and select **Apply Mailing Group** from the Ribbon.

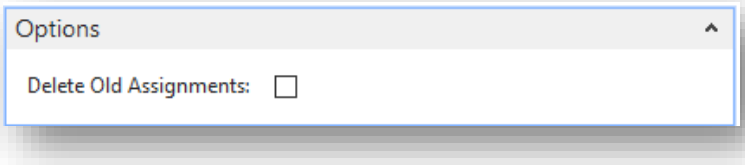


The **Apply Mailing Group** window opens.



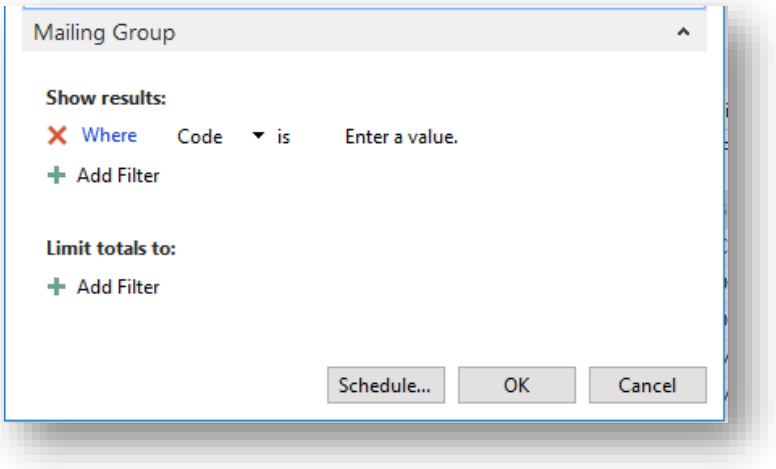
OPTIONS FASTTAB

Select this check box to remove previous contacts that were assigned to the Mailing Group.



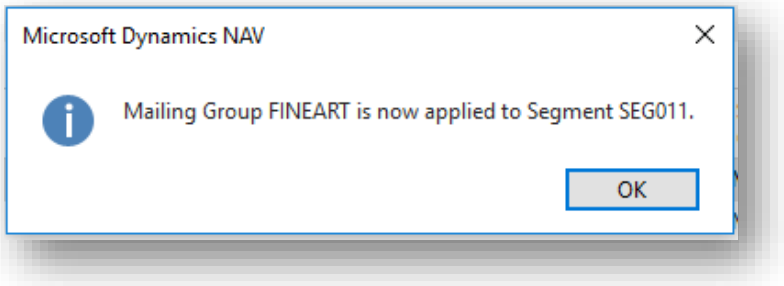
MAILING GROUP FASTTAB

Use filter to select a Mailing Group that you want to assign to the segment, and then choose the **OK** button.



Confirmation message appears stating: “Mailing Group … is now applied to Segment …”

Select **OK** to close the window.



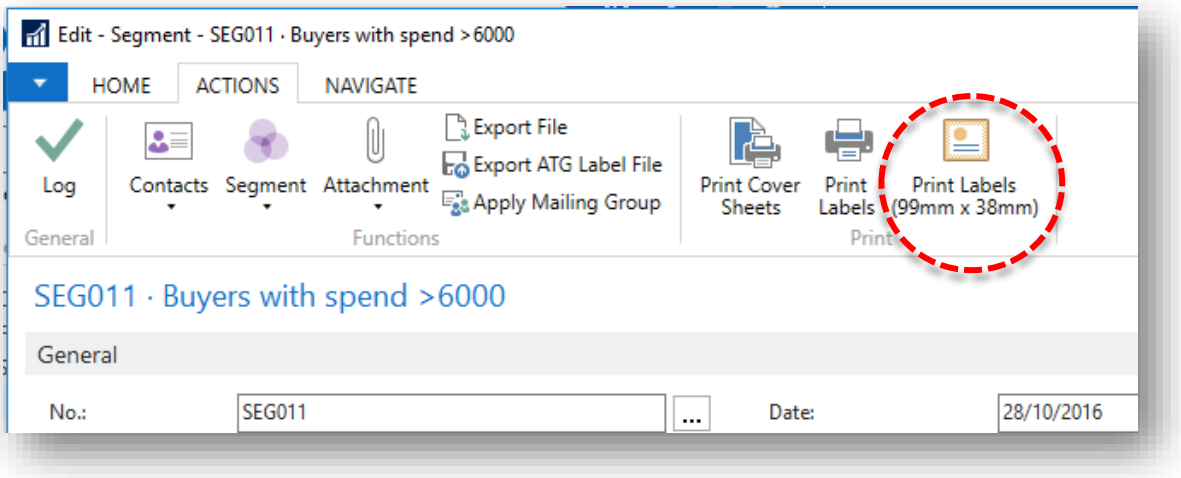
Repeat these steps to assign as many Mailing Groups as you like to the segment.

PRINTING LABELS

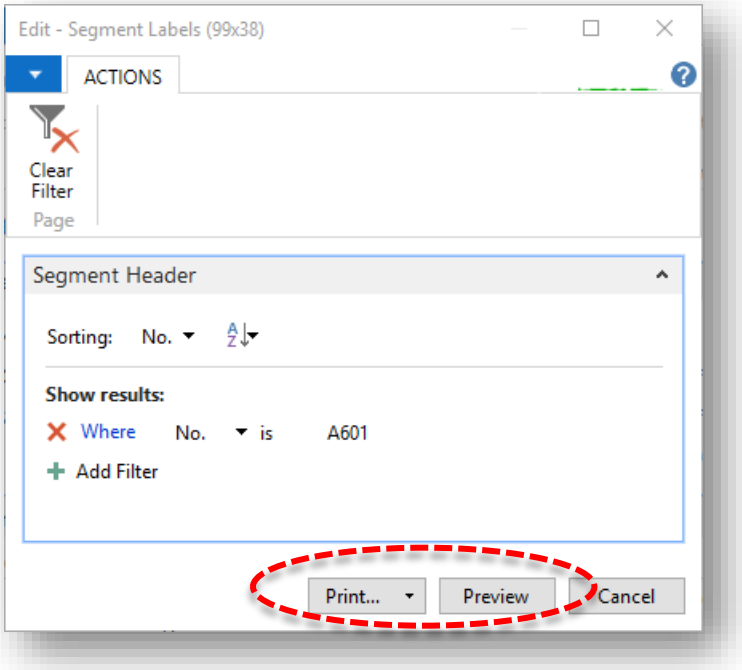
There are few options available to prints address labels for contacts from selected segment.

PRINT LABELS (99MM X 38MM)

1. Open a segment and select **PRINT LABELS (99mm X 38mm)** from the Ribbon.

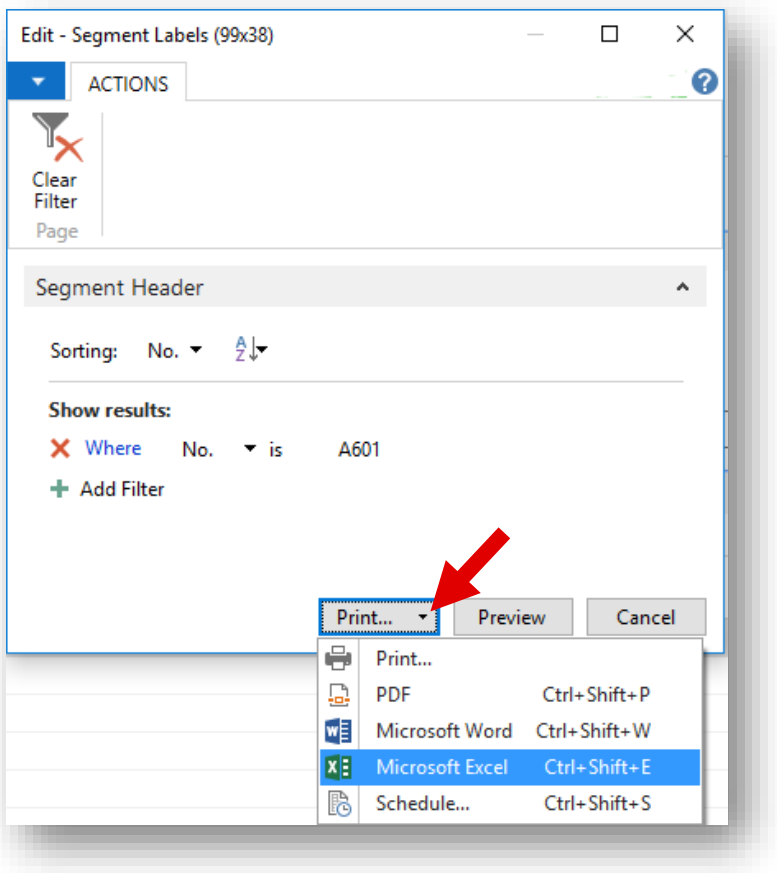


2. The **Segment Labels (90x38)** window opens.
   Select the **Print** button or the **Preview** button to process the labels.



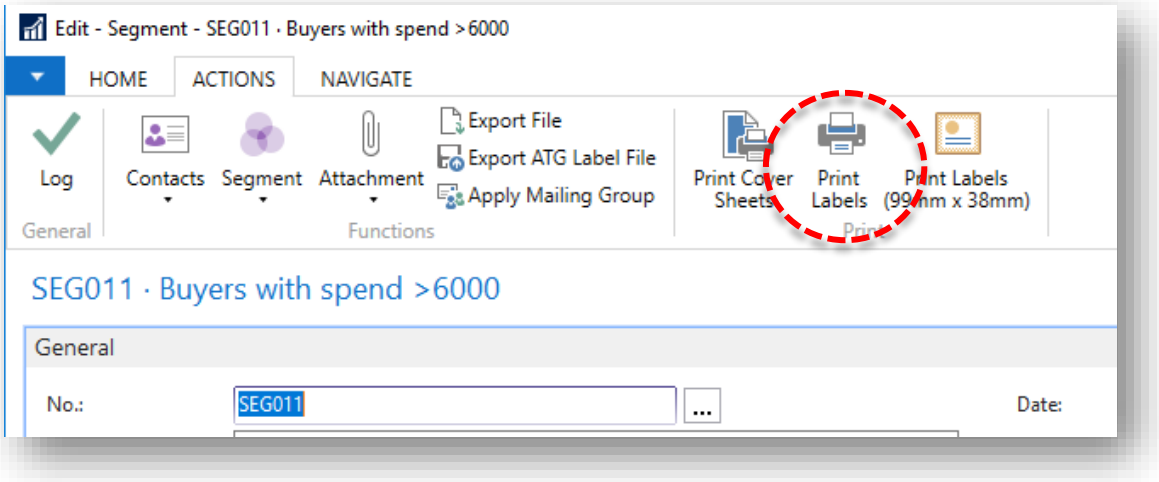
NOTE

To save the labels, click on arrow on the **Print** button, and then select a format.

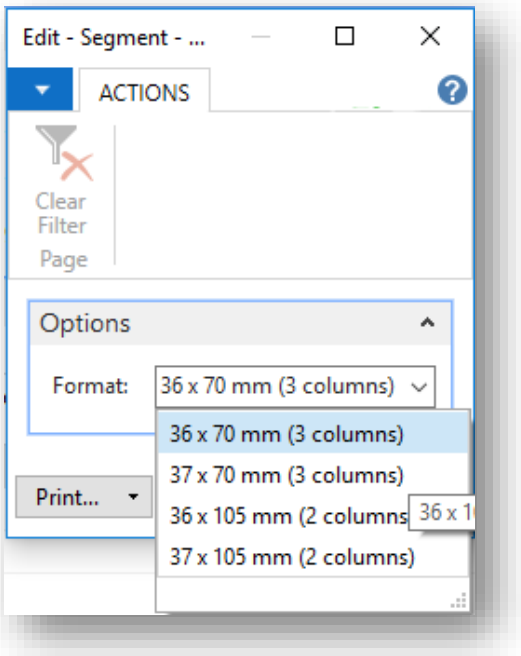


PRINT LABELS

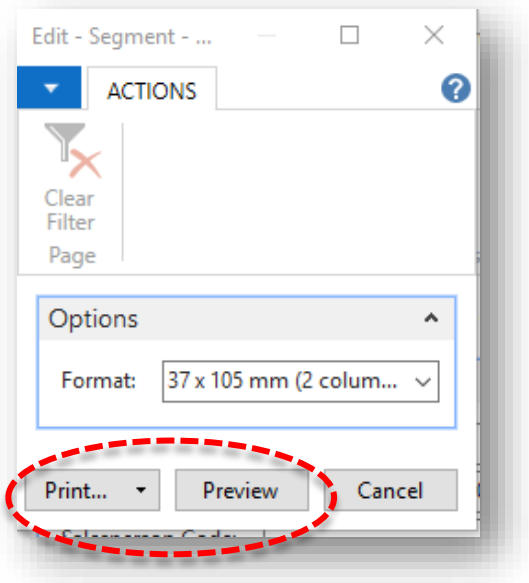
1. Open a segment and then select **Print Labels** from the Ribbon



2. Select a format from the list:
    - 36 x 70mm (3 columns)
    - 37 x 70mm (3 columns)
    - 36 x 105mm (2 columns)
    - 37 x 105mm (2 columns)

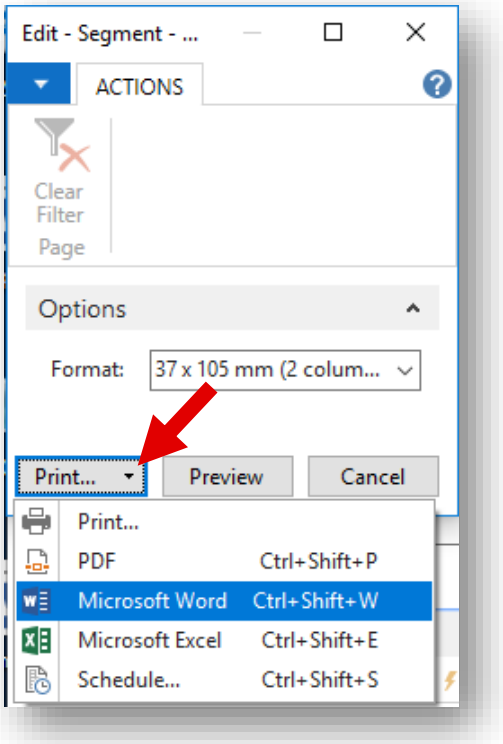


3. Select the **Print** button or the **Preview** button to process the labels.



NOTE

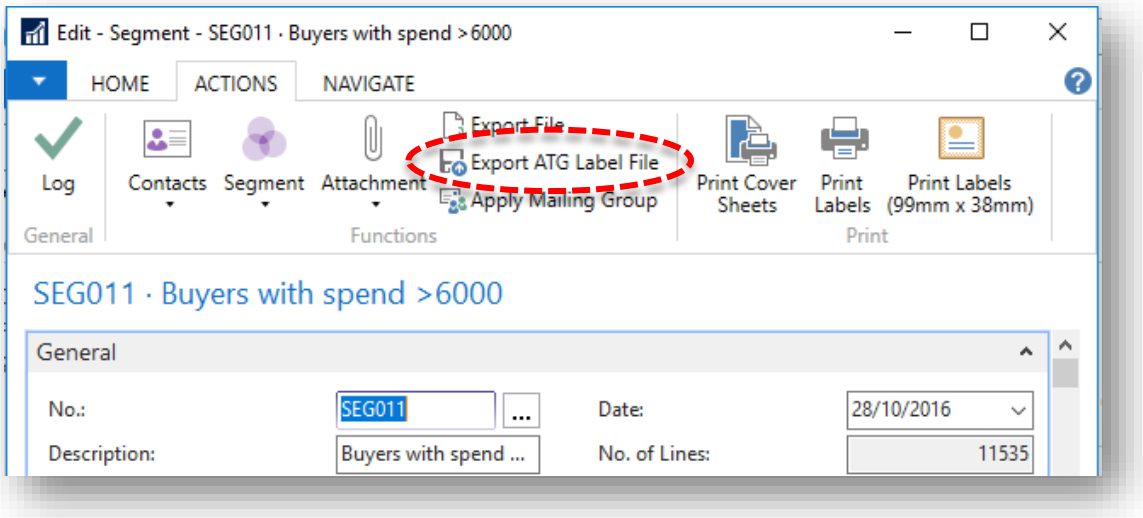
To save the labels, click on arrow on the **Print** button and then select a format.



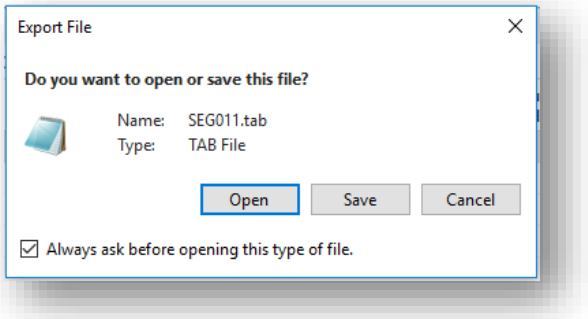
EXPORT ATG LABEL FILE

Use this option to create a file with contact labels following ATG requirements.

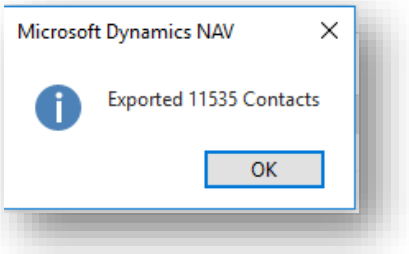
1. Open a segment and then select **Export ATG Label File** from the Ribbon.



2. This will generate new window were you can choose to **Open** or **Save** the file.
   The file name is created of the segment code with extension TAB.



3. Select **OK** to confirm on message stating number of exported contacts.



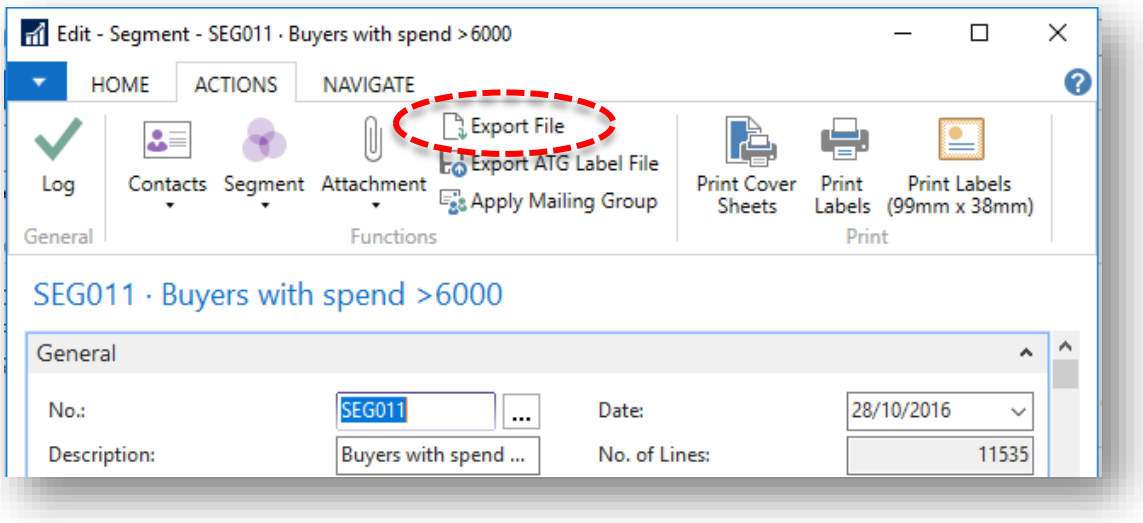
Use Notepad or Excel to open the file.

EXPORT FILE

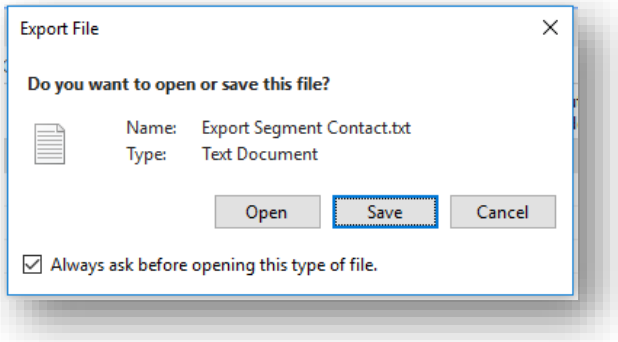
You can export segments to a disk file, if you want to send a list of contacts to marketing agency.

To export contacts to a file:

1. Open a segment, and then select **Export File** from the Ribbon.



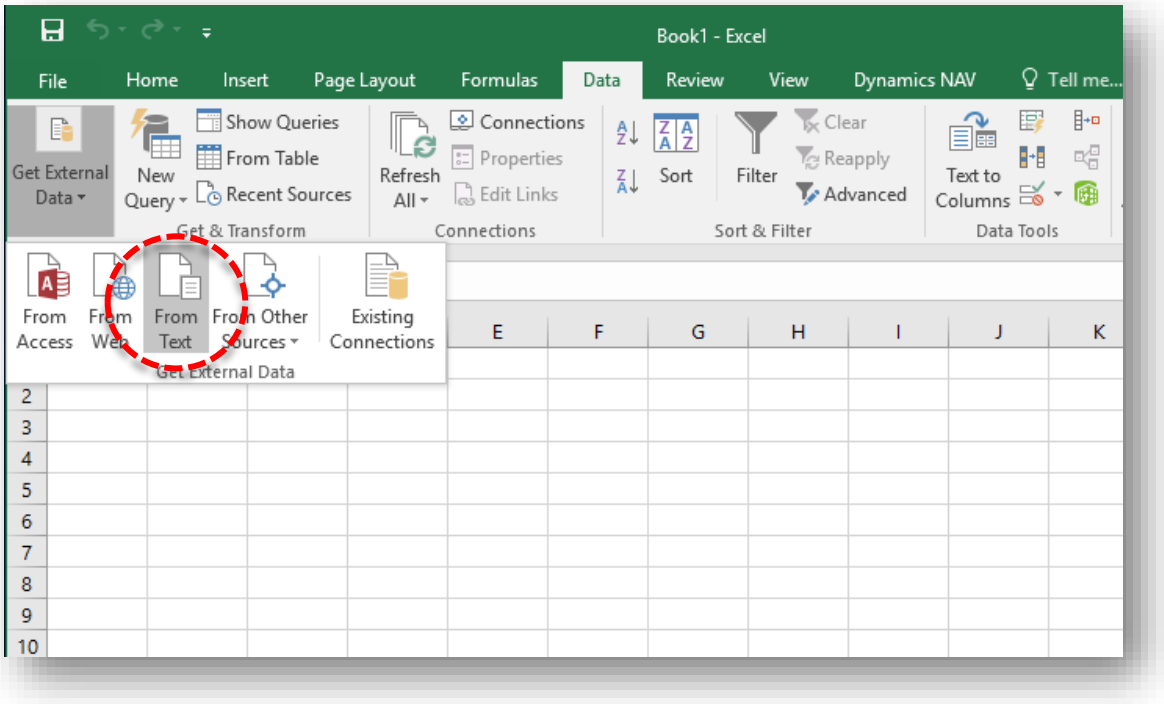
2. Select the **Save** button.



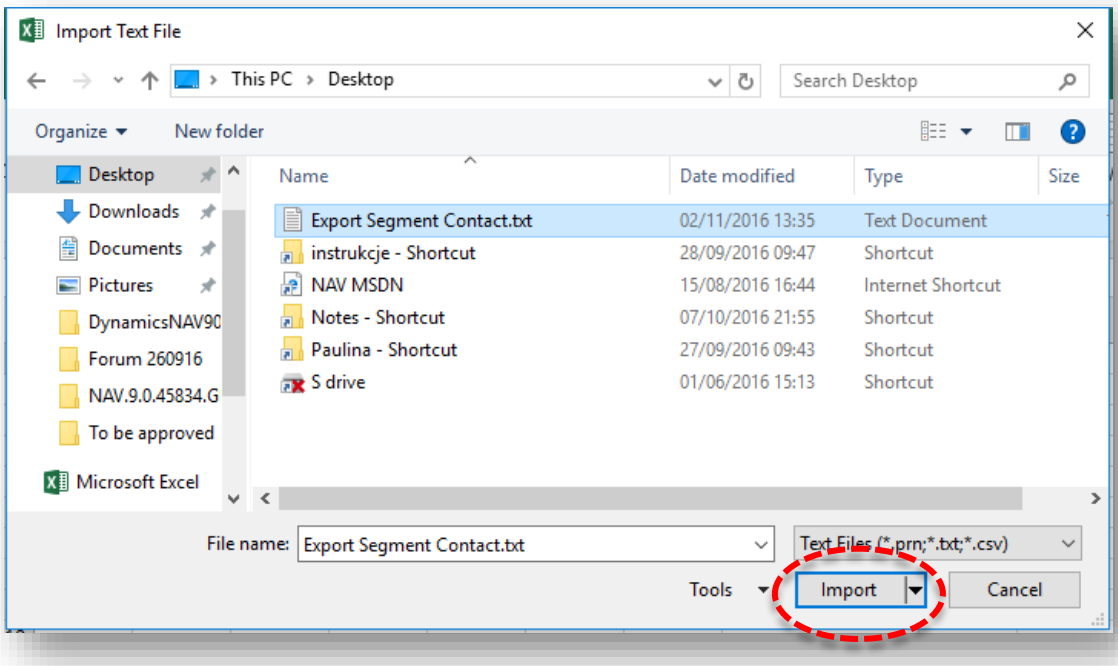
3. Browse to the folder where you want to save the file, and fill in the **File Name** field. Saved file has extension TXT and is Coma Delimited.

To open the file use Excel:

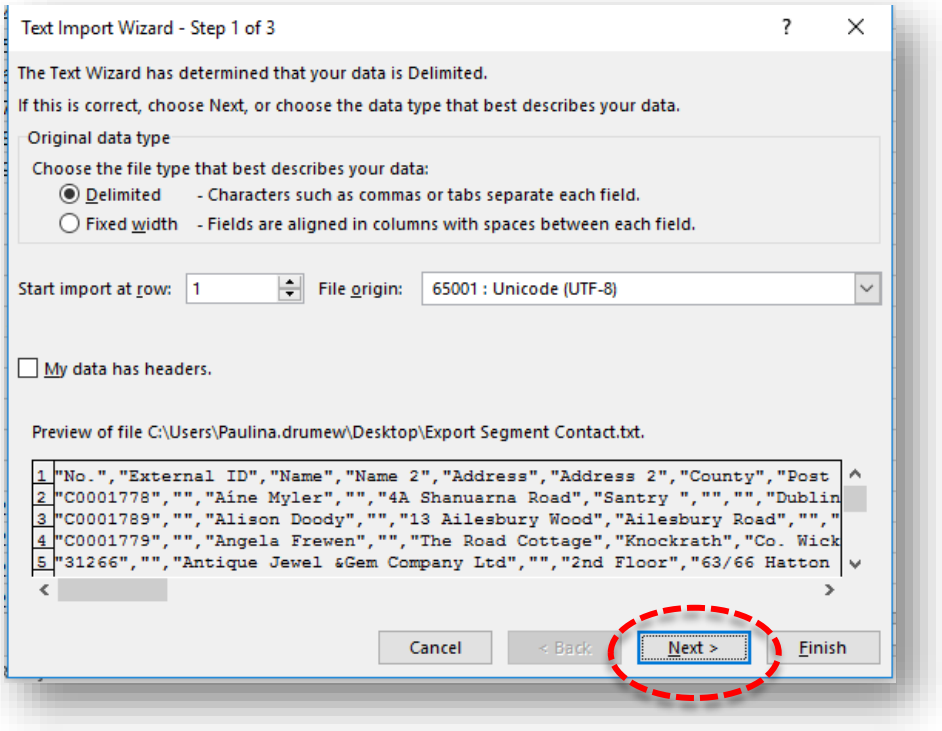
1. Open new Excel spreadsheet, navigate to **Data**, select **Get External Data**, and then choose **From Text**.



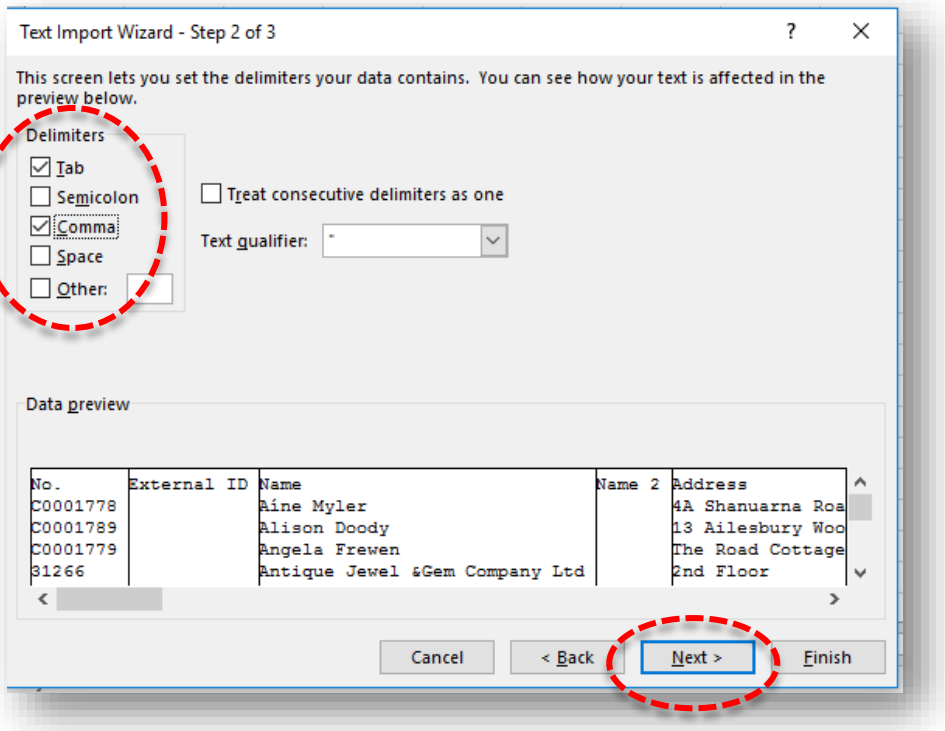
2. Navigate to exported file and select the **Import** button.



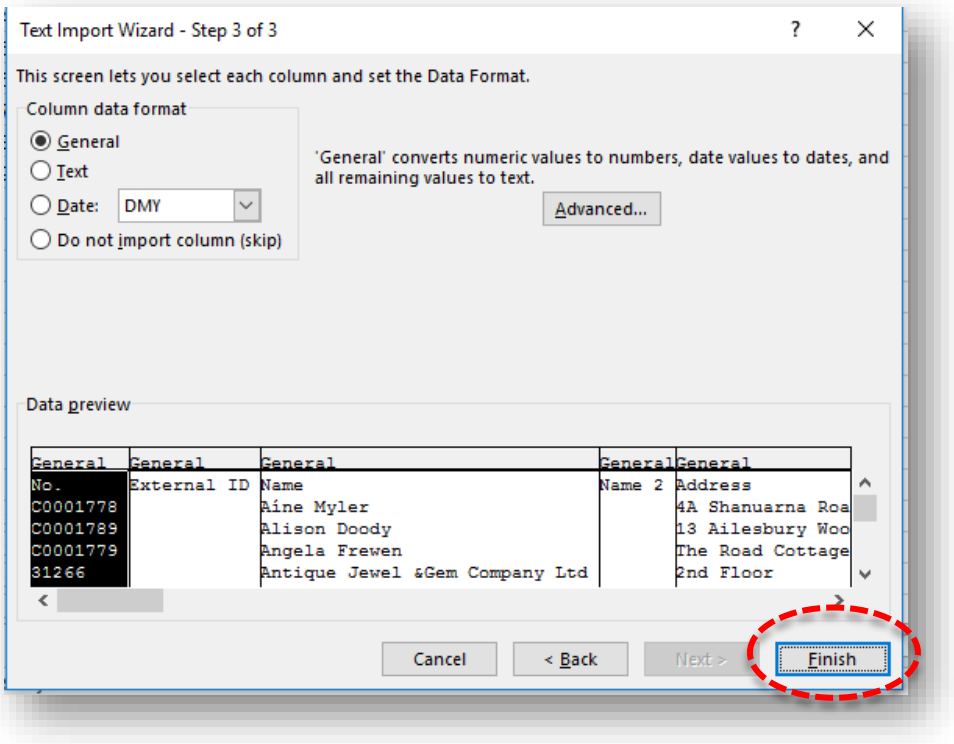
3. In new window do not apply any changes, click the **Next** button.



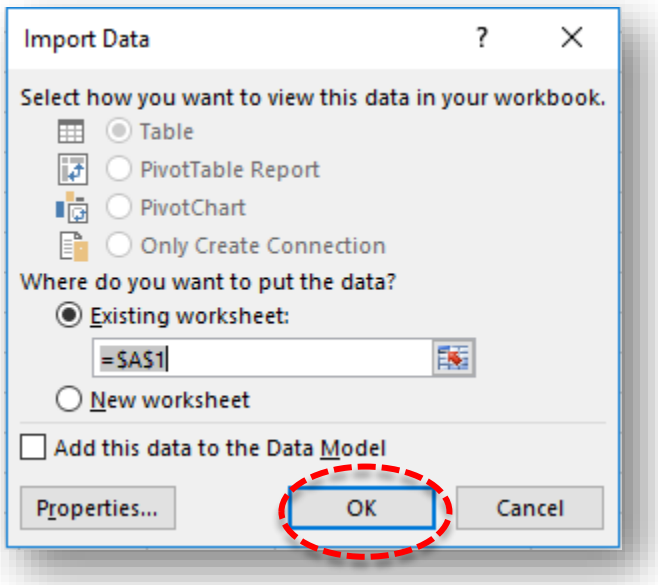
4. On the next screen select **Delimiters** for **Tab** and **Comma**, and then click the **Next** button.



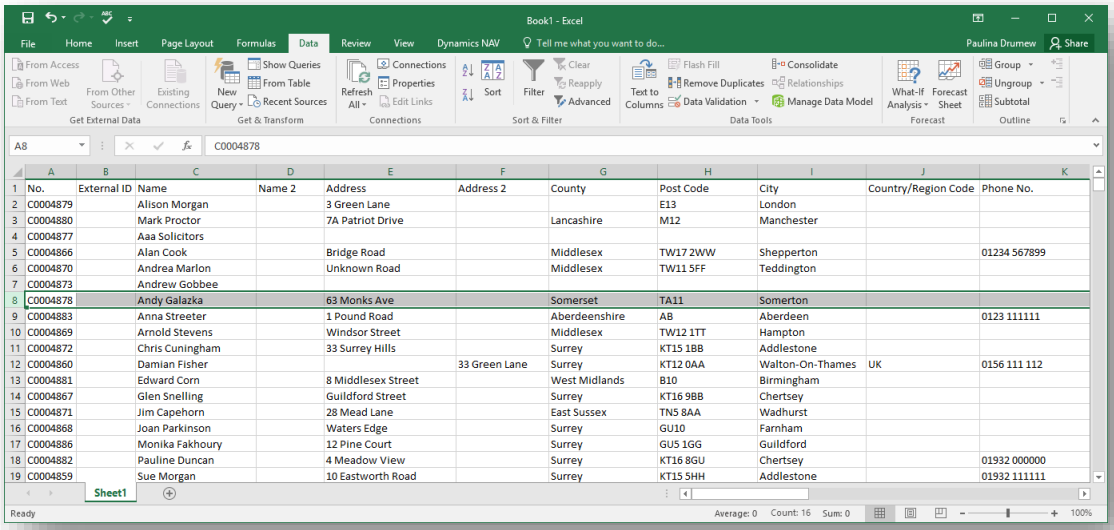
5. On the next screen, confirm by selecting the **Finnish** button.



6. Finally select the **OK** button to confirm Import Data.



Now all contacts from exported file are imported to the spreadsheet.



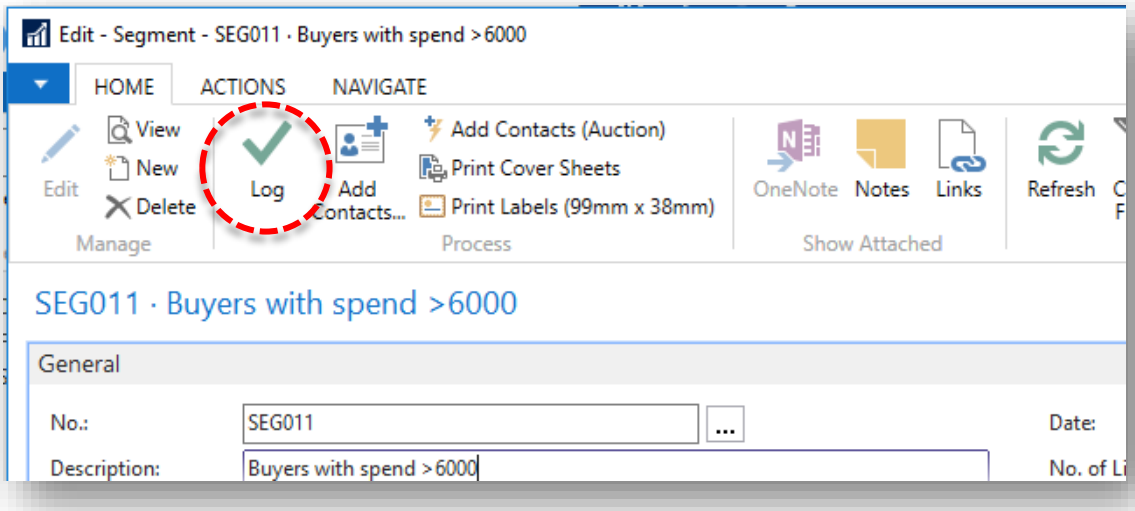
No.	External ID	Name	Name 2	Address	Address 2	County	Post Code	City	Country/Region Code	Phone No.
C0004879		Alison Morgan		3 Green Lane			E13	London		
C0004880		Mark Proctor		7A Patriot Drive		Lancashire	M12	Manchester		
C0004877		Aaa Solicitors								
C0004866		Alan Cook		Bridge Road		Middlesex	TW17 2WW	Shepperton		01234 567899
C0004870		Andrea Marlon		Unknown Road		Middlesex	TW11 5FF	Teddington		
C0004873		Andrew Gobbee								
C0004878		Andy Galazka		63 Monks Ave		Somerset	TA11	Somerton		
C0004883		Anna Streeter		1 Pound Road		Aberdeenshire	AB	Aberdeen		0123 111111
C0004869		Arnold Stevens		Windsor Street		Middlesex	TW12 1TT	Hampton		
C0004872		Chris Cuningham		33 Surrey Hills		Surrey	KT15 1BB	Addlestone		
C0004860		Damian Fisher			33 Green Lane	Surrey	KT12 0AA	Walton-On-Thames	UK	0156 111 112
C0004881		Edward Corn		8 Middlesex Street		West Midlands	B10	Birmingham		
C0004867		Glen Snelling		Guildford Street		Surrey	KT16 9BB	Chertsey		
C0004871		Jim Capehorn		28 Mead Lane		East Sussex	TN5 8AA	Wadhurst		
C0004868		Joan Parkinson		Waters Edge		Surrey	GU10	Farnham		
C0004886		Monika Fakhoury		12 Pine Court		Surrey	GU5 1GG	Guildford		
C0004882		Pauline Duncan		4 Meadow View		Surrey	KT16 8GU	Chertsey		01932 000000
C0004859		Sue Morgan		10 Eastworth Road		Surrey	KT15 5HH	Addlestone		01932 111111

LOGGING SEGMENT

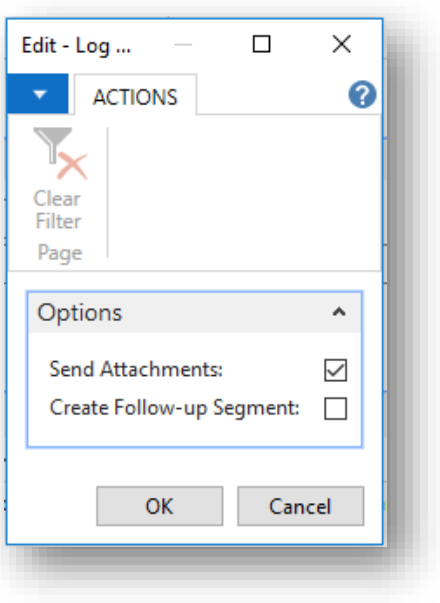
In a segment window, when you select **Log**, the program records interactions in the Interaction Log Entry table, and logs the segment. Logged segments can be found in the **Logged Segment** window.

To run the batch job:

1. Open a segment window, and then choose **Log** from the Ribbon.



2. The **Log Segment Window** opens.

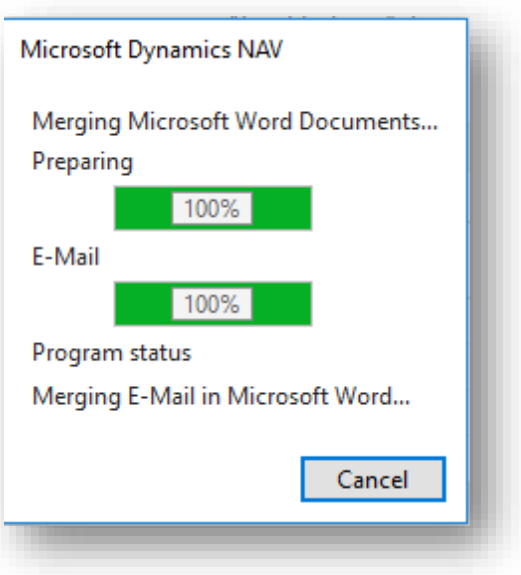


Field name	Type	Description
Send Attachments	Tickbox	Select the check box if you want to deliver the attachments and send by e-mail or print. In use for interactions.
Create Follow-up Segment	Tickbox	Select the check box if you want to create a new segment that contains the same contacts.

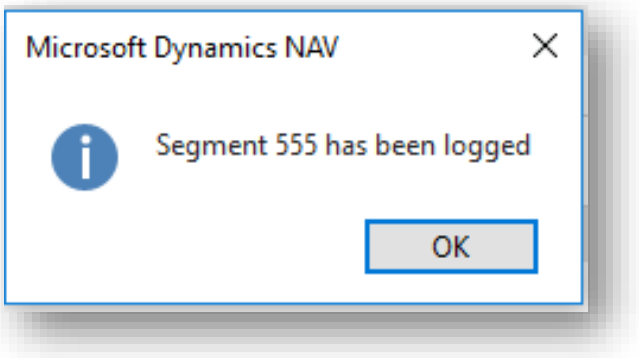
NOTE
To create a follow-up segment, you must have specified number series for segments in the **Marketing Setup** window.

3. Select **OK** to process.

4. Wait for process to compete.



5. Select **OK** to close the confirmation message.



Now an interaction is recorded for each contact within the segment in the Interaction Log Entry table, and the segment is logged.

If you have selected the **Create Follow-Up Segment** check box, a new segment is created that contains the same contacts as the segment you have just logged.

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