

Create Segments Based on Custom Fields



There are a number of data variables that can be used when creating a segment including pages visited, products viewed, time spent, and campaigns viewed. But you can also create custom fields in Evergage called attributes to capture other data then use it to segment users.

This Article Explains

This article details how to use custom attributes in segments. For information on creating an attribute or viewing existing attributes in your dataset, please refer to [Modify Attributes at the User or Account Level](#).

Sections in this Article

- [Create Segment Based on Custom Fields](#)
- [Segment Examples](#)

Create Segment Based on Custom Fields

1. [Create a Segment](#)
2. Add a **Metrics** rule
3. Depending on the type of attribute, select either **KPI** or **Text Attribute**
4. Select the attribute and complete any additional parameters

Segment Examples

Below are several examples of custom attributes used in segments. Some are passed from the CRM system, some are passed through a third party integration, and some are custom attributes created from a customer survey.

Visitor has completed a survey and indicated a preference for yellow

Segment Name: Favorite Color Yellow

Metrics | Text Attribute | Favorite Color | equals | yellow | case-sensitive

NEW RULE

NEW GROUP

Select Rule

- Engagement
- KPI
- Text Attribute**
- Ordered Funnel Status

Visitor's age as recorded in the CRM is over 25

Segment Name: CRM - Age Over 25

Metrics | KPI | Is the KPI | CRM_AGE_ | Value | is | greater than | 25

NEW RULE

NEW GROUP

greater than

- equals to
- less than
- greater than**
- at least
- between
- at most

Support tickets have increased by 20% for an account

Segment Name: Account - Support Ticket Increase

Metrics | KPI | % from CRM | Support Tickets (Customer/Support Tickets) | % Change | is | greater than | 20 | % from the value | 20 | High Age

NEW RULE

NEW GROUP

A *Plan Type* exists in the CRM for the account

Segment Name: Account - Plan Type All

Metrics | Text Attribute | Plan type (platype) | exists

NEW RULE

NEW GROUP