

Segment Rules



An Evergage segment is a real-time grouping of accounts or individuals based on a set of criteria you define. Segment updates happen in real-time, so any membership changes occur immediately, even during the same visit.

This Article Explains

This article details segment categories and rules. Refer to [Create a Segment](#) for more information about creating segments in Evergage.

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Campaigns

- **Campaign Stat Count**—user did or did not view, click, dismiss, or qualify to view (based on control group membership) the selected campaign, either any experience or a specific experience for the specified number of times
- **Campaign Stat Recency**—user did or did not view, click, dismiss, or qualify to view (based on control group membership) the selected campaign, either any experience or a specific experience any time during the past specified number of days
- **A/B Test Segment**—randomly sorts users into as many segments as desired across your entire user base, totaling 100%. For example, Segment A = 0%-15%, Segment B 15%-30%, Segment C 30%-50%, Segment D 50%-85%, Segment E 85%-100%. This rule is inclusive, so the ending % of one segment needs to be the beginning % of the next segment. This rule can be used to randomly generate groups of users for analytics, or to ensure that users see a consistent test or control experience across multiple campaigns.

New Segment

Users Membership Segment Compare **Setup**

Segment Name

Campaigns

Required.

- Select Rule
- Campaign Stat Count
- Campaign Stat Recency
- A/B Test Segment

Actions

Actions defined for your data set are listed in **Reports > Actions**

- **Action Count**—user did or did not do any action, or any or all of specific actions a specified number of times during a defined time period
- **Page View Count**—user did or did not view a specific number of pages during a defined time period
- **Action Recency**—user did or did not do any action, or any or all of specific actions during the past specified number of days
- **Time Since First Action**—user did or did not do a specific action for the first time during a defined time period

Subscription

- **Lifecycle State**—user is at the specified subscription level
- **Time Since Lifecycle Transition**—user transitioned from the specified subscription level to another specified subscription level during a defined time period and stayed or did not stay in that state

Visits

- **Visit Count**—user visited or did not visit a specified number of times during a defined time period
- **Visit Duration**—user visited or did not visit for more than a specified number of seconds, minutes, or hours during a defined time period
- **Visit Recency**—user visited or did not visit in the last specified number of days
- **Visit Source**—user visited or did not visit from a mobile device or from the web at least once during a defined time period. This will only populate if the client has a mobile app connected to Evergage
- **Time Since First Visit**—user visited or did not visit for the first time during a defined time period
- **Originating Referrer**—user's originating referrer URL, medium, source name, search terms, domain, sub-domain meets or, in some cases, does not meet the specified criteria

New Segment

Users Membership Segment Compare **Setup**

Segment Name

⚠ Required.

+ NEW RULE

+ NEW GROUP

- Select Rule
- Action Count
- Page View Count
- Action Recency
- Time Since First Action

New Segment

Accounts Membership Segment Compare **Setup**

Segment Name

⚠ Required.

+ NEW RULE

+ NEW GROUP

- Select Rule
- Lifecycle State
- Time Since Lifecycle Transition

New Segment

Users Membership Segment Compare **Setup**

Segment Name

⚠ Required.

+ NEW RULE

+ NEW GROUP

- Select Rule
- Visit Count
- Visit Duration
- Visit Recency
- Visit Source
- Time Since First Visit
- Originating Referrer
- Anonymous



NOTE

Evergage detects the originating referrer medium is by checking the URL of the referrer against an updated list of common social network referrers.

Currently, Evergage detects the following social network referrers: Badoo, Bebo, BlackPlanet, Buzznet, Classmates, Cyworld, Delicious, Disqus, Douban, Facebook, Flickr, Flixster, Fotolog, Foursquare, Friends Reunited, Friendster, Gaia Online, Geni, GitHub, Google+, Habbo, Hacker News, hi5, Hocam.com, Hyves, Identi.ca, Inci Sozluk, Instagram, Last.fm, LinkedIn, LiveJournal, Mail.ru, Mixi, MoiKrug.ru, Multiply, MyHeritage, MyLife, Myspace, myYearbook, Nasza-klasa.pl, Netlog, Odnoklassniki, Orkut, Paper.li, Pinterest, Plaxo, Pocket, Quora, Qzone, Reddit, Renren, Skyrock, Sonico.com, SourceForge, StackOverflow, StudiVZ, StumbleUpon, Tagged, Taringa!, Tuenti, Tumblr, Twitter, Uludag Sozluk, Viadeo, Vimeo, Vkontakte, vKruguDruzei.ru, WAYN, WeeWorld, Weibo, Windows Live Spaces, Xanga, XING, and YouTube.

- **Anonymous User**—user is or is not anonymous

Location

- **In**—user's zip code, city, metro, state/region, or country is or is not known or part of the defined list
- **Near**—user's zip code, city, or latitude-longitude is within a specified number of miles of the specified zipcode, city, or latitude-longitude
- **ISP**—user's ISP is or is not known or contains or does not contain one of the specified ISP names
- **Company**—user's company is or is not known, is equal to, or contains or does not contain one or more specified organization names
- **Industry**—user's industry is or is not known or is or is not one of the specified industries (enter a partial industry name to see options)

Metrics

KPI, text attributes, and ordered funnel status are pre-defined based on information provided to Evergage at the time of setup. If you need to make adjustments, please contact your Customer Success representative or [Evergage Support](#).

- **Engagement**—user's engagement score meets the defined criteria and percentages
- **KPI**—selected KPI value or % change for user meets the defined criteria
- **Text Attribute**—user's selected attribute meets the defined criteria
- **Ordered Funnel Status**—selected funnel status is at, before, or after the specified funnel step

New Segment

Users Membership Segment Compare **Setup**

Segment Name

⚠ Required.

+ NEW RULE

Select Rule

- In
- Near
- ISP
- Company
- Industry

+ NEW GROUP

New Segment

Users Membership Segment Compare **Setup**

Segment Name

Metrics **Required.** Select Rule

+ NEW RULE

+ NEW GROUP

- Select Rule
- Engagement
- KPI
- Text Attribute
- Ordered Funnel Status

Third Party

This option will only populate if you have a first-class third party email provider syncing with Evergage. Currently, Eloqua is the only option but support for Marketo will be available soon.

- **External ID**—known Evergage user's ID has or does not have the defined third party application ID

New Segment

Users Membership Segment Compare **Setup**

Segment Name

Thirdparty External ID has select product

+ NEW RULE

+ NEW GROUP

- select product
- Salesforce Marketing Cloud ID
- Marketo ID
- Eloqua ID

Items

- **Action First Time**—user completed the specified action for the first time during a defined time period
- **Action Count**—user completed the specified action at least, at most, or between a specified number of times during a defined time period
- **Time Spent**—user viewed any or specific categories for a specific duration of seconds, minutes, or hours during a defined time period
- **Favorite**—user's favorite specific category is a defined item (name or ID) measured by the specified criteria (viewed, viewed detail of, added to cart, purchased, reviewed, shared, commented on, or favorited) during a defined time period
- **Cart Adds Value**—user added to cart a specific dollar amount worth of any or specific categories for a defined time period
- **Purchases Value**—user purchased a specific dollar amount worth of any or specific categories for a defined time period
- **Cart Contents**—shopping cart line item count or total value is at least, at most or between a specified dollar amount
- **Order First Time**—user's first order was during a defined time period
- **Order Count**—user's number of orders is at least, at most, or between a specified number for a defined time period
- **Order Value**—user's total or average order value is at least, at most or between a specified dollar amount during a defined time period

New Segment

Users Membership Segment Compare **Setup**

Segment Name

Items **Required.** Select Rule

+ NEW RULE

+ NEW GROUP

- Select Rule
- Action First Time
- Action Count
- Time Spent
- Favorite
- Cart Adds Value
- Purchases Value
- Cart Contents