

Create Manual Segments



Manual segments are a type of segment with a fixed, manually-specified list of members, as opposed to rule-based segments, whose members are determined in real-time based on a defined set of rules. You can use manual segments to group known users or accounts based on data that is not natively collected by Interaction Studio or available through third-party integrations.

This Article Explains

This page details ways to use manual segments and how to set them up.

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Why Use Manual Segments?

Typically, manual segments are used when you want to target a group of users using a variable not tracked by Interaction Studio. For example, suppose you are hosting a live event and want to personalize your website for event attendees. You would need to create a manual segment connecting Interaction Studio to your tracking system by a common data point like attendee email address. Other scenarios that would require the addition of a manual segment for targeting include:

- Recent trade show or webinar attendees
- Users who are part of a particular mailing list
- Ideal users – flagging this group to use as an input to engagement score

Other uses include:

- Freeze users as of a particular day or date range. Adding them to a manual segment preserves their values on that
- Setting a manual segment as a filter for campaign measurement. Note that manual segments cannot be set up as goals in *Interaction Studio*

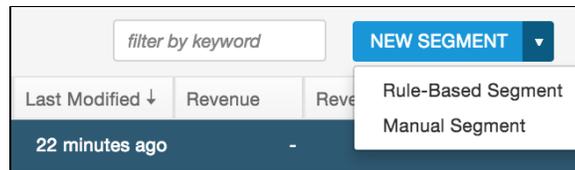
Create a Manual Segment

1. Log into *Interaction Studio*
2. Click **User Segments** on the left navigation
3. Click the arrow to the right of **NEW SEGMENT** and select **Manual Segment**



NOTE

Most customers can only create **User Segments**, which is the default *Segment Type*. If you have accounts configured on your dataset and want to create a manual *Account Segment*, you must first select **Account Segments** as the *Segment Type* from the left nav.



4. Enter the **Segment Name**
5. Click **SAVE**

- The segment name will change and will be differentiated from a rule-based segment by  next to the name

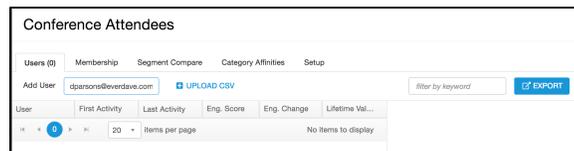
Adding Members to a Manual Segment

After you save the segment, you will be on the *Users* tab. Since this is a manual segment, the *Users* tab will not have members until you add them. You have 3 options to add users to a manual segment.

- Add users one at a time using the *Add User* field on the *Users* tab.
- Add users using the **Upload CSV** functionality on the *Users* Tab
- Add users using a CSV upsert through the REST API (please note this option is only available for customers using Evergage Classic)
- Set up a *Manual Segment ETL* feed integration using the *Feeds Dashboard*.

Add Users One at a Time

- Add members one at a time by typing the user ID (or name for named users) in **Add User**
- Select the user you want to add



If you enter an email address in the *Add User* field and the user is not added as a member of the segment, it is likely that the Interaction Studio userID is not the email address

- Alternatively, click **UPLOAD CSV** to upload a CSV file that meets the following format requirements listed below
- Click **Select files...** or drag and drop a file to upload

Add Users by Uploading a CSV



CSV File Layout

- In the *Users* tab, click the **Upload CSV** button
- Prepare your CSV file using the format below.
- Select the file and upload it
- Validate that your segment added users in the *Users* tab

CSV Format

The CSV record must contain a column with the header value *ID*, *id*, or *name* with values that match Interaction Studio User or Account IDs. The file may include additional columns, but they will be ignored by Interaction Studio.

ID	name
tom@inc.com	Tom Jeffries
dick@inc.com	Dick Smith
harry@inc.com	Harry Davis

Add Users through the REST API

Review full instructions for upserting users with the [REST API](#) in this knowledge base.



Evergage Classic Only

Please note, this option is only available for customers with datasets on [beacon version 15](#) or lower. You will not be able to change your dataset's beacon version above version 15 and if you downgrade below beacon version 16, you will not be able to upgrade yourself.

If your dataset is on beacon version 16 or higher, please use another option to add users to your manual segment.

Add Users through the Manual Segment ETL

Review full instructions for [Manual Segment ETL](#) in this knowledge base.

Remove Members from a Manual Segment

There are three ways to remove users from a manual segment:

1. One at a time, directly in Interaction Studio in the *Users* tab (best for removing small numbers of users)
2. Through the [REST API](#) (Evergage Classic only)
3. Using the [Manual Segment ETL](#)