

How does Segmentation work?

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Applies To: PoliteMail Desktop PoliteMail Online PMUA PoliteMail M365

Version: 4.9 5.0 5.1+

Segmentation

PoliteMail allows you to break down a Metrics report in multiple ways, called segmentation. For one, you can view a Metrics Report by distribution list (if sent to multiple or even nested Lists). You can also segment the report by what you have defined in the Custom Fields fields. Finally you can also segment a report based on any Custom Fields you have defined, such as employee title or role.

There are limits on the minimum segment size for reporting (to maintain privacy), as well as the maximum number of segments per send. More information may be found [here](#).

Setup

If you're using nested Lists, you'll need to make sure those are created. If you're using Custom Fields, you'll need to make sure the Custom Field is filled for all recipients/members (usually as part of your Custom Fields setup). Be sure to check the 'Segment' checkbox! Custom Fields can only be created by Administrators.

Viewing Segmentation Reports

To start, go to **POLITEMAIL > Results > Messages**. Double-click on the desired message to open the Metrics report. Once there, click on **Segmentation**.

- If Segmentation is greyed out, either no recipients had values in the Custom Field(s), or the number of segments was less than the minimum Segment Size specified in your settings.

Message Results > Report

Report generated November 29, 2021 7:42 AM- [Update](#) - [Archive](#)

%Δ Compare  Benchmark  Segmentation  Excel  Word  Mail ...

You will now see a list of all the segments (distribution lists and Custom Fields) you sent your message to.

Subject	Type	To	Sent	Open Rate	Read Rate	Click Rate	Sent Date	From	Last Updated	Sender
Sierra's favorite movie. Templat...		support team <support_team@poli...	13	0%	0%	0%	4/13/2023	Sierra Gauthé <sierra.gauthé@poli...	1:21:42 PM	Sierra Gauthé
Sierra's favorite movie. Templat...		Region - Asia	13	0%	0%	0%	4/13/2023	Sierra Gauthé <sierra.gauthé@poli...	1:21:42 PM	Sierra Gauthé
Sierra's favorite movie. Templat...		Location - Singapore	13	0%	0%	0%	4/13/2023	Sierra Gauthé <sierra.gauthé@poli...	1:21:42 PM	Sierra Gauthé
Sierra's favorite movie. Templat...		Management - No	13	0%	0%	0%	4/13/2023	Sierra Gauthé <sierra.gauthé@poli...	1:21:42 PM	Sierra Gauthé
Sierra's favorite movie. Templat...		CUSTOM11 - Puroilite do Brasil Ltda...	13	0%	0%	0%	4/13/2023	Sierra Gauthé <sierra.gauthé@poli...	1:21:42 PM	Sierra Gauthé
Sierra's favorite movie. Templat...		CUSTOM11 - Puroilite Sp. z o.o.<br...	13	0%	0%	0%	4/13/2023	Sierra Gauthé <sierra.gauthé@poli...	1:21:42 PM	Sierra Gauthé
Sierra's favorite movie. Templat...		CUSTOM12 - Dell Laptop 14"	13	0%	0%	0%	4/13/2023	Sierra Gauthé <sierra.gauthé@poli...	1:21:42 PM	Sierra Gauthé
Sierra's favorite movie. Templat...		CUSTOM12 - Desktop and Dell lapt...	13	0%	0%	0%	4/13/2023	Sierra Gauthé <sierra.gauthé@poli...	1:21:42 PM	Sierra Gauthé

- Click on any item to see the metrics for that segment.

Note that Segmentation Metrics are created at the time of send; if a Message is sent with no segmentable custom fields and the field was marked as 'Segment' after the send, the segmentation metrics will not display.

PoliteMail