

How does Segmentation work?

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Applies To: ☒ PoliteMail Desktop ☒ PoliteMail Online ☐ PoliteMail M365

Version: ☒ 4.9 ☒ 5.0 ☒ 5.1+

Segmentation

You may often want to break down a Metrics Report by various segments, such as state, department, employee type, etc, beyond the Business and Region fields. For example, you have 2 different distribution lists covering the North and East regions of the United States and you've sent one email message to both of them. You want to know the metrics for each list and how they compare to each other.

This can be done using [Custom Fields](#) and/or nested Lists.

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 [Email Merge](#)). 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

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Mail

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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 Gauthe <sierra.gauthe@polit...	1:21:42 PM	Sierra Gauthe
 Sierra's favorite movie. Templat...		Region - Asia	13	0%	0%	0%	4/13/2023	Sierra Gauthe <sierra.gauthe@polit...	1:21:42 PM	Sierra Gauthe
 Sierra's favorite movie. Templat...		Location - Singapore	13	0%	0%	0%	4/13/2023	Sierra Gauthe <sierra.gauthe@polit...	1:21:42 PM	Sierra Gauthe
 Sierra's favorite movie. Templat...		Management - No	13	0%	0%	0%	4/13/2023	Sierra Gauthe <sierra.gauthe@polit...	1:21:42 PM	Sierra Gauthe
 Sierra's favorite movie. Templat...		CUSTOM11 - Purolite do Brasil Ltda...	13	0%	0%	0%	4/13/2023	Sierra Gauthe <sierra.gauthe@polit...	1:21:42 PM	Sierra Gauthe
 Sierra's favorite movie. Templat...		CUSTOM11 - Purolite Sp. z o.o.<br...	13	0%	0%	0%	4/13/2023	Sierra Gauthe <sierra.gauthe@polit...	1:21:42 PM	Sierra Gauthe
 Sierra's favorite movie. Templat...		CUSTOM12 - Dell Laptop 14"	13	0%	0%	0%	4/13/2023	Sierra Gauthe <sierra.gauthe@polit...	1:21:42 PM	Sierra Gauthe
 Sierra's favorite movie. Templat...		CUSTOM12 - Desktop and Dell lapt...	13	0%	0%	0%	4/13/2023	Sierra Gauthe <sierra.gauthe@polit...	1:21:42 PM	Sierra Gauthe

- 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.