Working with target groups
Smart Guide

This Smart Guide shows you how to create target groups that you can then use to personalise your mailings or the individual articles in your mailings.

Preparation: Various types of conditions can be set up for target groups [1]. In this example, you learn how to create a target group with a condition on a column value. Check that the columns required for the target group are present in the recipient data table. Note the column values.

Create target groups

There are two types of target groups: Local target groups that are only available for a specific mailing list and global target groups that are available for all mailing lists.

Target groups can be used for an entire mailing or individual articles in a mailing.

1. A) To create a global target group, click the ⚙ *(Global settings)*.
   B) To create a local target group, open the respective mailing list.

2. Then click the ▽ *Target groups* agent.

3. Click 🗋 *(Create new target group)*.

4. Enter a name for the target group and click *OK* to confirm.

5. Click 🔡 *(Add condition)*.

6. In the dialog box, select *Condition on column value* and the column.

7. Click *Next*.

8. Select *Relational operator* and specify the *Comparison value* [2].

9. Click *Finish* and 🖫 *(Save)*.

10. Open the 🔍 *Check* workflow step to view the recipients in the new target group [3].

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Mailing for specific target group

1. Create, check and approve a new mailing in the usual way.

2. Open the 👥 *Recipients* workflow step.

3. Select *Recipients who belong to each of these target groups*.

4. Click ＋ *(Add target group)*, select the target group and click *Add + Close* to confirm.

5. Click 🖫 *(Save)*. [4]

6. Send the mailing in the usual way. The mailing will only be sent to the recipients who belong to the target group.

[1] POSSIBLE TARGET GROUPS

Conditions for target groups can be created for the following:

› Condition on column value
› Condition on recipient reaction
› Condition on mailings sent
› Dispatch interruption
› Existing target group
› Free condition expression

[2] COMPARISON VALUE

The comparison value must match the column value in the recipient data table exactly (pay attention to the use of small and capital letters). In the case of Yes/No columns, only the comparison value needs to be selected.

[3] TEST PROFILES

The *Test profiles* agent can be used to set up virtual recipients for testing whether an assignment to a target group is correct.

[4] RECIPIENT PREVIEW

The number of recipients is recalculated automatically. The recipients assigned to the target group are displayed in the preview pane.

Article for specific target group

When working with a template, the Add element option can be used to assign a target group to articles [5]. A target group can also be included using the command function.

Add personalisation by element

1. Open the required mailing and the element to which the target group is to be assigned.

2. Click ✚ *(Add element)* and select the Target group element.

3. Click *Add + Close*.

4. Click ▽ *(Target group)* and select *Recipients who belong to each of these target groups*.

5. Click ✚ *(Add target group)* to select the target group and click *Add + Close* to confirm.

6. Click *OK* [6].

7. Click 🖫 *(Save)*. The article is only visible for the selected target group.

8. Check, approve and send the mailing in the usual way.

Personalisation by command

1. Open the required mailing.

2. Highlight the HTML tags or text to which the target group should be applied.

3. Click *Commands* and select *Condition (if/else)*.

4. Confirm the *First condition (if)* selection and click *Next*.

5. Select the *Condition on column value* option and the column.

6. Click *Next*.

7. Select *Relational operator* and specify the *Comparison value* [2].

8. Click *Finish* and 🖫 *(Save)*. The highlighted part of the mailing is only visible for the selected target group.

9. Check, approve and send the mailing in the usual way.