Unite Education Program v6.0
Job Aid: 5574

Add a Static Segment to Unite with a Query

A static segment is a group of people that you target for an email campaign. Because the segment is static, the members do not change unless you add or remove a member. If you do not know the people by name and want to add people based on certain conditions, you can add them by query. Segments remain in a draft status until you are ready to go live. To use a segment in a customer journey, the segment status must be **Live**.

Step 1: Create the segment

1. Open a browser and log on to Unite.

2. On the main menu, click JOURNEYS.

3. On the navigation pane, click **Segments**.

4. On the command bar, click ＋ New .

5. Click **+New Static Segment**.

6. In the **Name** text box, enter a unique name for the segment.

7. In the **School Id** text box, enter your LSAC school code.

8. Click **Save and Close** .

Note

    It may take up to 10 minutes for Unite to provision the new segment.

Step 2: Add a query block

1. On the *Members* tab, click ＋ **Add by Query** .

2. Select the name of the entity.

> **Note**
>
> The entity determines what fields are available to query. Unite defaults to the **Contact** entity for a simple query. Next to **Contact**, click ☑ to select a different entity that starts the query. If you do not start with the **Contact** entity, you must add the contact entity at the end of the query block.

Step 3: Add a clause to the query block

1. From the **Select attribute** list box, select a field.

2. From the **Equals** list box, verify or select a filter operator.

3. In the search box, enter or select a value for the field if applicable.

4. If the entity you selected for the query block is not **Contact**, click the **Select entity** list box, and then select **Contact**. If the entity is **Contact**, skip this step.

5. Add clauses to the query block, if needed. Otherwise, skip this step.

Step 4: Add more clauses to the query block, if needed

1. In the first query block you just completed, click ⊞ **Add** .

2. On the drop-down menu, click **Add condition to…** .

> **Note**
>
> If you add multiple clauses to an entity, you can set the condition operator depending on how you want to link the clauses. The AND operator is more exclusive; it only finds records that meet all the criteria of each clause you add to the entity. The OR operator is more expansive; it finds all records that meet any of the criteria for the entity clauses.

3. Repeat **Step 3: Add a clause to the query block** for each clause you want to add.

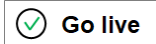   You can add a query block to search in other entities, if desired.

Step 5: Perform the query

1. Scroll to the bottom of the *Manage Segment Members* window, and then click **Estimate size**.

2. Verify the number of estimated people match expectations for the size of your segment, and then edit the query if necessary.

3. After you specify all the query conditions, click **Find** .

Step 6: Add people to the segment

1. Click **Add all** to add all the people to the segment or select the check box next to the **Full Name** for each person you want to add to the segment. Then click **Add selected** .

2. Click **X** to close the *Manage Segment Members* window.

Step 7: Save the segment and go live

1. On the command bar, click ⓘ **Check for errors** .

2. If your segment passes the error check, click 💾 **Save** . Otherwise, fix the errors.

3. If you are ready to use the segment in a customer journey, click ⊘ **Go live** on the command bar. Otherwise, skip this step.

4. On the navigation pane, click **Segments** to close the segment and return to the *Active Segments* grid.