Unite Education Program v6.2
Job Aid: 5575

## Add a Dynamic Segment to Unite

A dynamic segment allows you to create a group of contacts based on a set of conditions and target the group for a specific email campaign. A dynamic segment works best for groupings in which the number of members may increase or decrease because conditions may change at any given time.

### Step 1: Add 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.  Select **New Dynamic Segment**.

6.  On the *Segment Templates* window, select a template or click **Skip** .

7.  Next to **School ID**, click ⌄ .

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

9.  In the **School ID** text box, enter your LSAC school code.

10. Next to **School ID**, click ⌃ to hide the drop-down window.

## Step 2: Add the starting query block

1. Click [⬙₊ **Add query block**] .

2. Select the name of the entity you want to query.

   > **Note**
   >
   > Unite defaults to the **Contact** entity. Next to **Contact**, click [⌄] to select a different entity.

   > **Note**
   >
   > If you do not start a query block with the **Contact** entity, you must end the query block with the **Contact** entity.

## Step 3: Add conditions to the query block, if needed

1. From the **Select Attribute** list box, select the field you want to query.

2. Verify or select a filter operator.

   > **Note**
   >
   > The default filter operator is **Equals**. Next to **Equals**, click [⌄] to select a different operator.

3. Enter or select a value for the field, if applicable.

4. If you want to add a clause for another condition, click [＋ **Add**] , and then enter or select the attribute options. Otherwise, skip this step.

   > **Note**
   >
   > There are three types of clauses you can add to an attribute. You can add a condition clause, a group clause, or a related entity clause.

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

## Step 4: Add an additional query block, if needed

1. From the **Select Entity** list box, select the name of the entity you want to query.

2. Add conditions to the query block, if needed.

3. Repeat for each query block you want to add to the segment.

   > **Note**
   >
   > If the entity you selected for the starting query block is not **Contact**, you must select **Contact** for the last query block. You do not have to add conditions to the **Contact** entity when it is the last query block.

## Step 5: Estimate the query reach

1. Scroll to the bottom of the page.

2. Click **Estimate size**.

3. Verify the number of estimated matches meet your expectations at the current time.

4. If necessary, edit the segment to increase or decrease the reach.

## Step 6: 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 Unite 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 *Segments* grid.