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CUSTOMER SEGMENTS USER GUIDE

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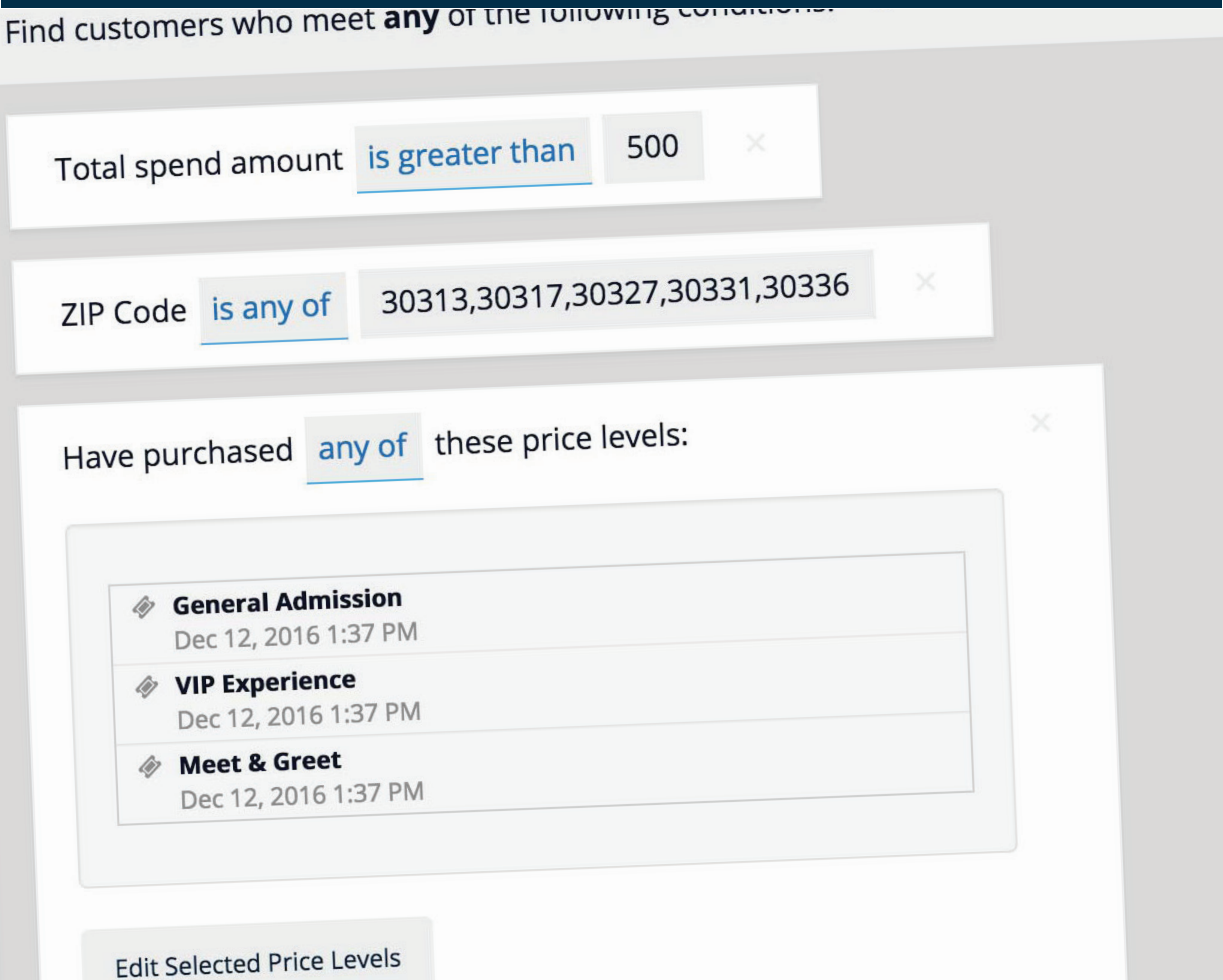
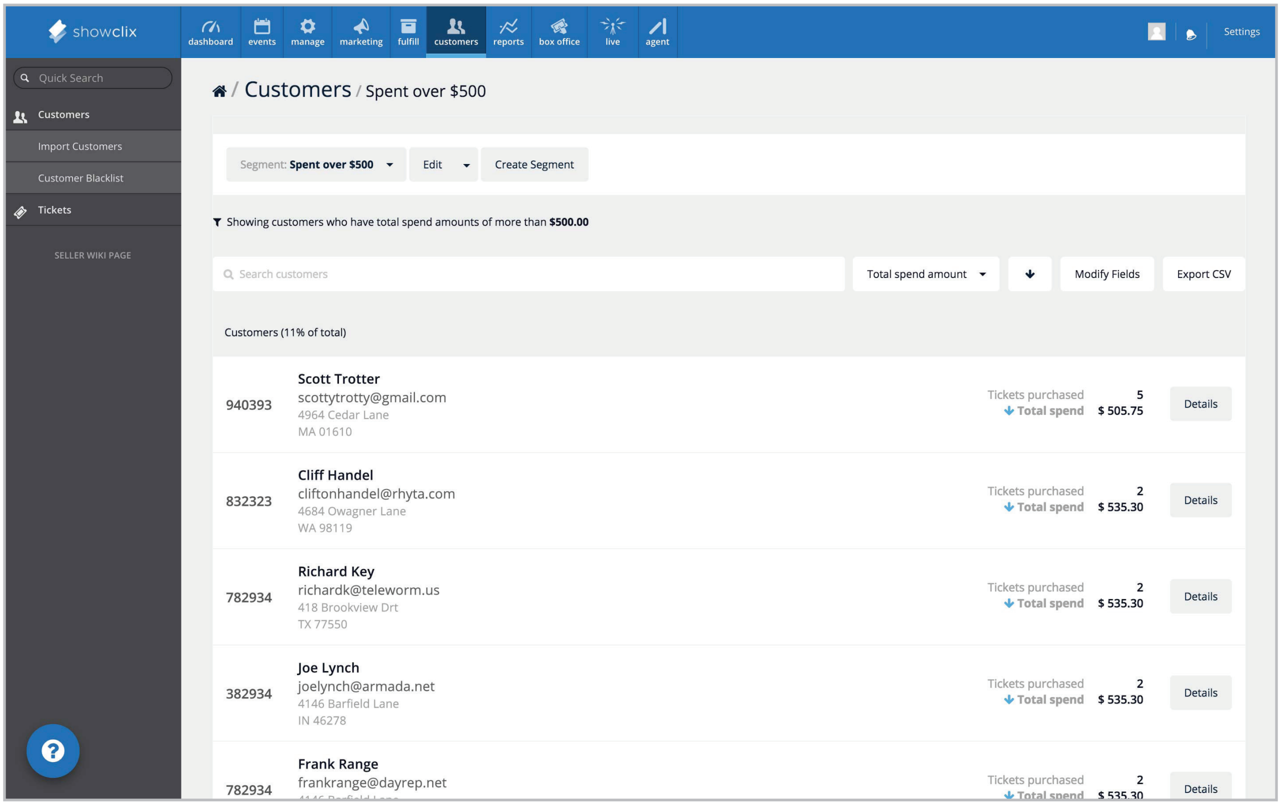




Welcome to the Customer Segments Help Guide!

Create segments of customers based on matching criteria, such as location, tickets purchased, event attendance, average spending, or over 2 dozen other parameters!

Along with the ability to create and save these segments, we’ve totally redesigned the process for searching and filtering your customer list.

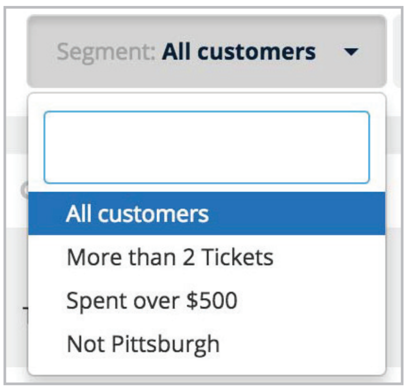
Finally, we’ve updated our email campaigns to allow you to send emails to segments you’ve created.

Follow this guide to learn about the changes!

How to Search and Filter Customers

The new Segments feature has been accompanied by a total redesign of our customer search engine. While some of the changes are merely aesthetic, the search now permits deeper search queries and more useful details when browsing a list of customers.

Create Segment

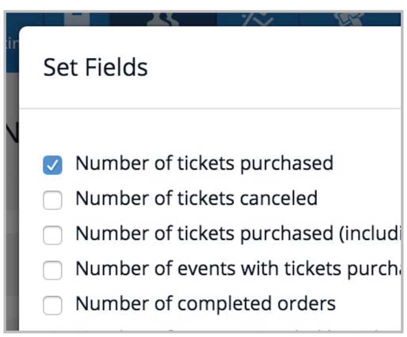


Segment: All Customers

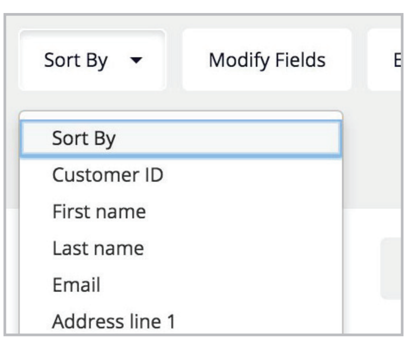
1. Browsing Segments

Use the options provided to create a new segment or filter your selection down to a segment you have already created.

- Click **Create Segment** to open a window that allows you to customize and create a new segment. (See *How to Create a Segment* for more details.)
- Click **Segment: All Customers** to open a dropdown of all of your existing segments.
- Once you've selected a segment, you can click the Edit button to make adjustments.
- The total amount of customers in the current selection will be displayed beneath the search field.



Modify Fields



Sort By

2. Searching, Sorting and Fields

To search your currently selected list of customers, enter a name into the search field. *(Note: You can currently only search this field by customer name.)*

- Click **Modify Fields** and check the preferred boxes to adjust the information displayed in the results.
- Click **Sort By** to sort the list based on one of your currently displayed fields.
    - Once you've selected a sorting option, click the arrow icon in the menu to switch between ascending and descending sorting.
- The following fields can be added to the customer search results:
    - Phone number
    - Number of tickets purchased
    - Number of tickets canceled

  - Number of tickets purchased (including canceled)
  - Number of events with tickets purchased
  - Number of completed orders
  - Number of events attended by tickets scanned or fulfilled on-site
  - Number of events attended by tickets scanned
  - Number of events attended by tickets fulfilled on-site
  - Total spend amount
  - Total donation amount
  - Average spend amount
  - Average donation amount
  - Average ticket amount
  - Average ticket count per order

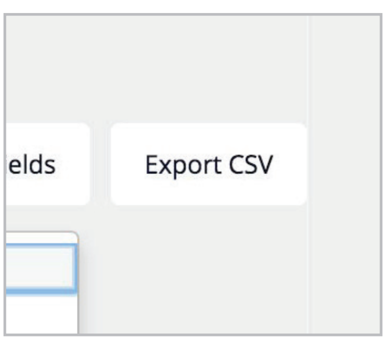
3. Customer Results

The default layout for your list of customer results always includes some fields (such as customer ID, customer name, email, address).

As noted above, you can use the **Modify Fields** button to adjust what fields are shown.

The following are always shown by default:

- **Customer ID.** In the left column.
- **Customer Name.** Bold, the first line in the middle column.
- **Email Address.** Second line in the middle column.
- **Mailing Address.** Bottom of each row in the middle column.
- **Customer Details.** Button found on the far right. Links to the Customer Details page for the customer.



Export CSV

4. Exporting

To export and download the current list displayed, click **Export CSV**.

(Note: This export includes all pages of the list beyond the currently displayed rows.)

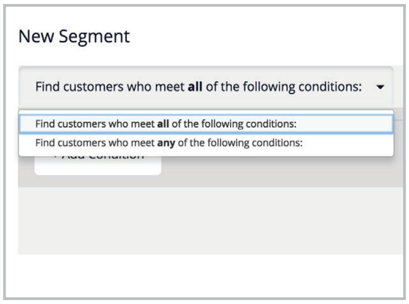
How to Create Customer Segments

Customer Segments are groups of customers, organized by common parameters you can establish. The creation of these segments has been included with an overall redesign of the **Customers** section in the Admin. The new section allows better filtering and sorting options, as well as the ability to export a CSV of a particular segment.

Create Segment

1. Getting Started

Click the **Customers** section in the Admin, and click **Create Segment**. This will open an overlay with the menu for setting up a new segment. The number of total customers associated with your account is displayed at the top.

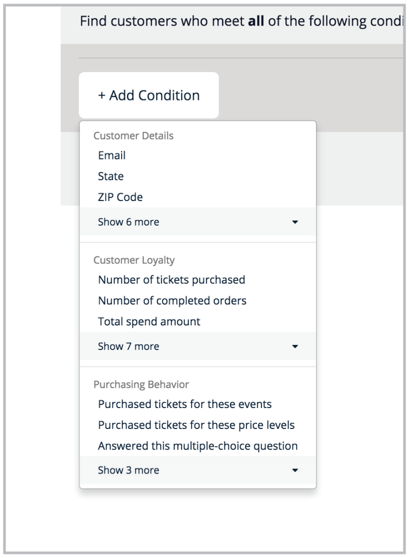


Select flexible or fixed condition

2. Flexible and Fixed Conditions

Next, you'll need to select between flexible (**any**) or fixed (**all**) conditions.

Use this option to determine whether customers in your segment must match all of your conditions, or if they must only match at least one of your conditions.



Select a condition to add

3. Selecting Condition Types

Click **Add Condition** to open a dropdown menu which displays all available condition types.

There are three different categories of available conditions.

- **Customer Details.** Basic customer information, such as name and mailing information. Useful for creating segments of customers in a similar location.
- **Customer Loyalty.** Customer purchase history with an emphasis on qualitative conditions, such as total amount spent. Useful for creating segments of frequent customers for rewards, marketing outreach, etc.
- **Purchasing Behavior.** Additional purchase history conditions with an emphasis on specific details, such as orders in a single date range or customers of a specific group of events. Useful for

identifying and exporting lists of customers with shared history.

- Click a condition type to add it to your segment's setup. As you add new conditions, you'll see the total customer number adjust to reflect your conditions. Once you've added a condition, you can adjust its parameters — see the next section, Editing Conditions — or you can keep adding new conditions.

4. Editing Conditions

Once you've selected a condition type, you must determine its parameters.

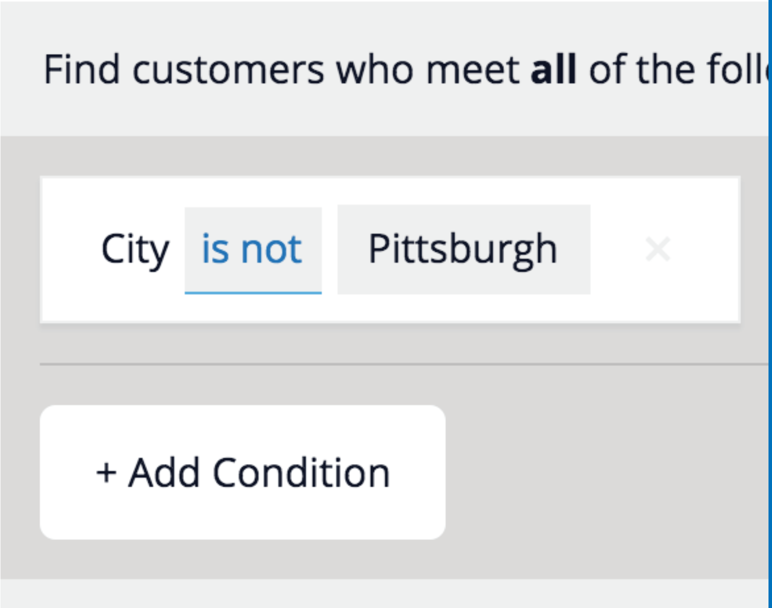
Each condition has three parts:

- a condition type;
- a conditional statement;
- and a value.

The **condition type** is most simply explained as the data you want to use in the condition (such as the customer's name or an average purchase amount).

The **conditional statement** determines the relationship between your condition type and the value you have entered.

The **value** is what you enter or select in the field provided.



For example:

In the condition **City** | **is not** | **Pittsburgh**...

- **City** is the condition type. It determines what piece of customer information we are observing for the condition — in this case, the city in their billing addresses.
- **Is not** is the conditional statement. This option specifies that we want our segment to exclude all customers who match the value we enter.
- Finally, **Pittsburgh** is the value. Again, in this example, we want a list of all customers who are not located in Pittsburgh, PA.

There are several different varieties of conditions, each with its own general style of conditional statements and values outlined below:

- **Text entry.** Enter text in the field provided. Some statements support comma-separated entry for multiple entries.
- **Numerical value.** Enter a number in the field provided. Some statements support comma-separated entry for multiple entries.
- **Dropdown menu.** Click the dropdown and select from the available options.
- **Event selection.** Use the search and filters provided to select from your events.
- **Date range.** Click the date field and enter the preferred date(s).
- **Question responses.** Click the dropdown and select a question; then select the accepted responses.

(Note: See the Appendix at the end of this guide for more detail on condition types and conditional statements.)

Finally, once you've selected all of your conditions, click **Show Customers** to complete your setup.

Appendix

The following is a detailed list of possible condition types and conditional statements.

Condition Type: Customer Details

- **First Name**
- **Last Name**
- **Email**
- **Address line 1**
- **Address line 2**
- **City**
- **State**
- **ZIP Code**
- **Country**

Condition Type: Customer Loyalty

- **Number of tickets purchased.** The total amount of tickets the customer has purchased. By default, does not include canceled tickets.
    - Note: This condition type also provides options for the amount of tickets canceled and the amount of tickets purchased with canceled tickets included.
- **Number of events with tickets purchased.** The total amount of events for which the customer has purchased tickets.
- **Number of products purchased.** The total amount of tickets the customer has purchased.
- **Number of completed orders.** The total amount of orders the cust omer has placed.
- **Number of events attended.** The total amount of events for which at least one ticket was marked as attended.
    - Note: This condition provides three options for specifying the definition of attended:
        - The ticket was scanned in.
        - The ticket was fulfilled on site.
        - The ticket was either scanned in or fulfilled on site.
- **Total spend amount.** The sum value of all purchases the customer has made. Includes face value, all fees, taxes, etc.
- **Total donation amount.** The sum value of all donations made through the Donation field in the checkout process, across all events.
- **Average spend amount.** The average order total of all orders the customer has placed.

- **Average donation amount.** The average amount of all donations made through the Donation field in the checkout process.
- **Average ticket amount.** The average cost of all tickets the customer has purchased.
- **Average tickets per order.** The average amount of tickets per order across all orders the customer has placed.

Condition Type: Purchasing Behavior

- **Purchased tickets for these events.** Includes customers who have purchased at least one ticket for the selected event(s).
- **Purchased tickets for these price levels.** Includes customers who have purchased at least one ticket for the selected price level(s).
- **Tickets by event date.** Includes customers who purchased at least one ticket within the selected date range.
- **Answered this multiple-choice question.** Includes customers who responded with the selected answer(s) to a particular question.
- **Orders by date.** Includes customers who placed an order within the selected date range.
- **Order amount by date.** Includes customers whose order total is within a certain range and occurred within the selected date range.

Conditional Statements

- **Is.** Specifically match the selected value.
- **Is not.** All who do not specifically match the selected value.
- **Starts with.** The selected letter/number matches with the first letter/number in the selected field.
- **Is any of.** Specifically match at least one of the selected values. (Separate each value with a comma.)
- **Is none of.** All who do not specifically match any of the selected values. (Separate each value with a comma.)
- **After.** Occurring on or after the selected date.
- **Before.** Occurring on or before the selected date.
- **From dates.** Occurring within the selected date range.
- **With these answers.** All customers who selected any of the selected responses.
- **Is greater than.**
- **Is greater than or equal to.**

- **Is less than.**
- **Is less than or equal to.**
- **Any of.**
- **None of.**
- **All of.**