

Configure advanced settings

Creating Criteria based lists

Marketing Automation allows you to create criteria based <u>lists</u> to aid in effective <u>contact</u> organization. You can create a list and define the conditions to be met for a contact to get added to the list. This way you can automatically create lists for different marketing activities.

To define list creation criteria:

- 1. Select Contacts from Navigation Toolbar and choose Lists.
- 2. Click on the list for which you want to set an entry criteria.

Starketing Automation	Q Search by name, email, and phone			¢ \$ 0
Bashboard	Contacts > Lists			Create list
් Contacts ~	ALL LISTS			
Contacts Dashboard	34 Lists created		Unclassified V What are you searching for?	
View Contacts Lists	LISTS	CONTACTS	UNSUBSCRIBES	
Segments Topics	Created on Jun 20, 2022 at 11:07 AM by	2	٥	:
Lead Qualification	SugarCRM Created on Jun 16, 2022 at 11:24 PM by	236	٥	:
لم Journeys >	Salesforce Created on Jun 16, 2022 at 10:42 PM by	838	0	:

3. Navigate to **Advanced Settings** and click **Configure**.

CONTACTS STATS	CONTACTS	ASSOCIATED JOURNEYS	ASSOCIATED CAMPAIGNS	ADVANCED SETTINGS
~ LIST ENTRY (CRITERIA			
			۵	dd contacts based on criteria
			······································	
		:	set a criteria for this list and add	a only those contacts that meet the set criteria. Learn more
				Configure

4. Configure the list entry criteria as per your needs.

←	Contacts > List	Edit list entry criteria X	
	Import List CONTACTS STATS CONTACTS ASSOCIATED JOURNEYS ASSOCIATED CAMPAIGNS	Set criteria to add contacts to the list. Contacts that do not match this criteria will be removed from the list.	
		Criteria Modifier Value	
		Select V Select +	
	VISTENTRY CRITERIA		
		+ ADD NEW GROUP	
	Set criteria to		
	Create lists to group contacts unde	Save Cancel	
	Conf		

Note: You can combine more than one criterion to refine the entry condition.

For example, if you want to add Contacts to a list whose email addresses are from Gmail and their First Name contains John, you can set up the criteria as shown below. This option is not dynamic, it will not automatically add new contacts to the list or remove contacts from the list based on criteria after the list has been created.

Edit list entry criteria			×			
i Set criteria to add contacts to t	he list. Contacts that do not match thi	s criteria will be removed from the list.				
Criteria*	Modifier*	Value*				
Contact Email V	contains ~	@gmail.com	×			
	And ~					
Criteria*	Modifier*	Value*				
First Name 🗸	contains ~	John	× +			
+ ADD NEW GROUP						
Save Cancel						

(i) Example use cases:

- A list of contacts from a particular location.
- A list of contacts who have submitted a survey.
- A list of contacts who have achieved a goal.
- A list of contacts who have completed a journey.
- A list of contacts born on a certain month and from a certain place.

List Key:

List Key is an unique key used to identify to which list contacts need to be imported using APIs. The **Subscribe API** makes use of list key as a parameter.

To find the list key:

- 1. Select **Contacts** form *Navigation Toolbar*. Choose **Lists** from the sub menu.
- 2. Click on the list for which you want to set an entry criteria.
- 3. Navigate to **Advanced Settings** tab at the top and click **List Key**.
- 4. Click Copy icon in the list key section. The key will be copied to your clipboard.

CONTACTS STATS	CONTACTS	ASSOCIATED JOURNEYS	ASSOCIATED CAMPAIGNS	ADVANCED SETTINGS	
~ LIST ENTRY	CRITERIA				
			A	dd contacts based on criteria	
	Set a criteria for this list and add only those contacts that meet the set criteria. Learn more				
				Configure	
~ LISTKEY					
List Key 3	z50c2a8c5ad7615	1b5d8df745dd4252c691ee94e	8e6df381cd08f		