

Filter a Segments Values Based on Other Segments

In some cases, you may want to limit a segment's available values based on choices the user made for other segments on the same record.

For example, suppose your organization sells merchandise worldwide. You may have multiple sales channels, such as brick-and-mortar stores, a web store, and partner outlets. However, although you can permit customers everywhere to use your web store, other channels may be available only in certain geographic regions.

In this case, you could create two segments, Sales Region and Sales Channel. You could configure a record's Sales Channel values to be filtered based on the selection the user makes for Sales Region. For example, you could configure a Sales Region called Denmark to permit the selection of only two Sales Channel values.

Classification

SUBSIDIARY

DEPARTMENT

CLASS

LOCATION

PROFIT CENTER

SALES REGION

SALES CHANNEL

Items

Shipping

Billing

Accounting

Relationships

Sales Team

Communication

COUPON CODE

PROMOTION

Calculate

DISCOUNT ITEM

RATE

Web Store

Catalog

You can also set up more complex filtering. You can configure a segment's available values to be dependent on multiple segments and on other classification fields, as described in the next section.

For details on filtering, see [Filtering for a Custom Segment](#).

Also, see [Benefits of Custom Segments](#).

Related Topics