Editing a Custom Segment's Values by Updating the Segment Definition
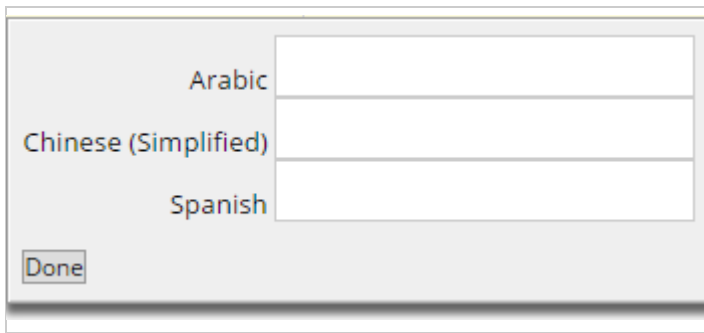
> **WARNING**
>
> This feature is not currently enabled in your account. To enable this feature, please contact your administrator.

If you have the appropriate privileges, you can modify a custom segment's values by editing the segment's Values sublist. One advantage of this approach is that you can view all of the values in the list as you make changes.

For details on the permissions required to complete this procedure, see Required Permissions for Editing Custom Segment Values. For an alternate method of editing values, see Editing a Custom Segment's Values by Clicking Manage Values.

To edit a custom segment's values by updating the segment definition:

1. Edit the custom segment.
2. Locate the value you want to change in the Values subtab. Make any of the following changes, as appropriate:
   - In the **Value** column, you can change the value's name. The value's name is displayed in the segment's list when the segment appears on a record.
   - If your account uses the Multi-Language feature, and you want to change translations for the value's name, click in the **Translation** column. The system displays a popup window. Modify the translations as needed. When you are finished, click **Done**.

- ○ If you want to create a parent or change the value's parent, click in the **Parent** column. The system displays a list. Adjust the list as appropriate. For details about parent-child relationships, see Creating Hierarchies Among a Custom Segment's Values.

- ○ If you want to change whether this value is visible to users, click in the **Inactive** column to display a check box. Check or clear the box as appropriate. Note that making the value inactive prevents the value from appearing as a stand-alone choice. However, if the value is a parent to another value, the value still appears as a parent.

- ○ If this segment uses filtering, you may want to create, change, or clear criteria for determining when this value is available. In this case, click the name of the value to display a series of buttons. Click **Set Filters** to display a popup window. The popup window shows the other classification fields you can use to set conditions for this value's availability. Make the appropriate changes. Then click **Set** to close the window. Click **OK** to close the series of buttons and save the filtering choices. For more information about filtering, see Filtering for a Custom Segment.

3. If you have more values to modify, repeat Step 2.
4. On the segment definition, click **Save**.

Related Topics