Customer Segments

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Purpose and when to use this record

Define the reusable audience rules used to select customers for ecommerce marketing.

At a glance

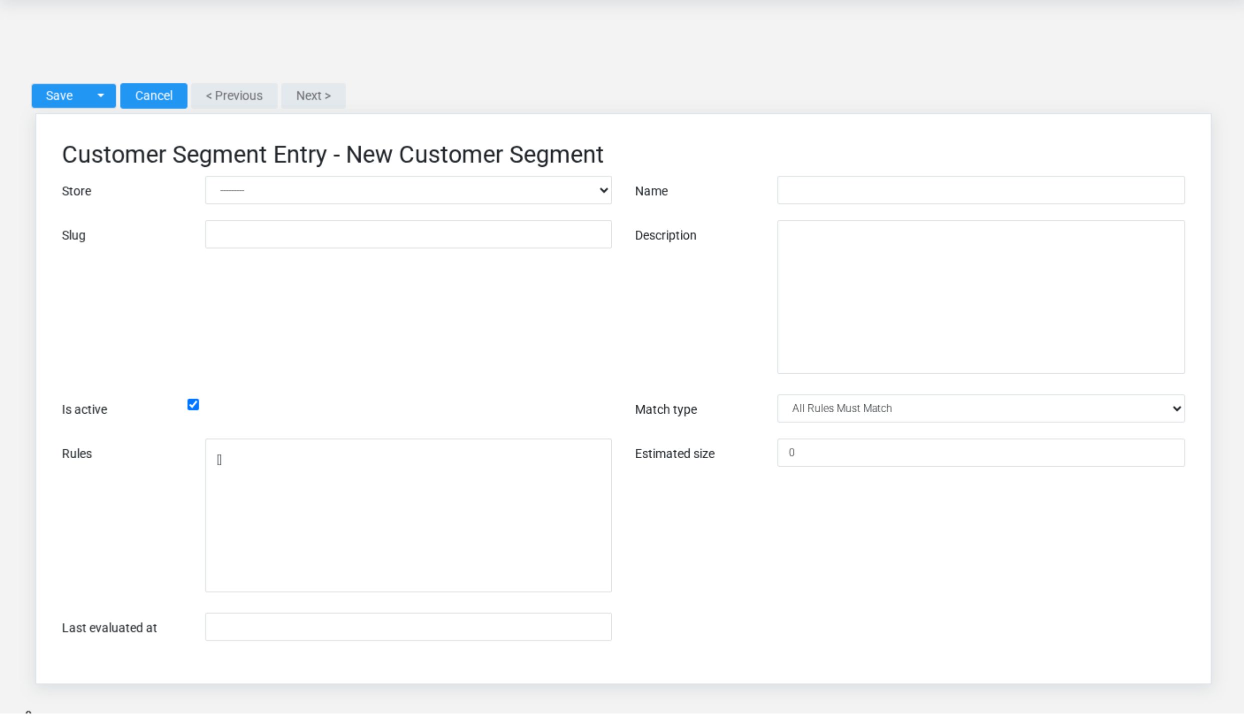
- **Identify it by: Name**.
- **Check its business context: Store**.
- **Why care:** Store, publication, consent, payment, and fulfillment states affect what customers see and what staff must act on; check the correct store before saving.
- **Why care:** Availability and publication flags affect future use without erasing history. Prefer disabling an obsolete setup record when existing transactions still refer to it.

Before you begin

You need the Brisk permission for the action you are taking on customer segments. If a Create, Edit, or Delete control is absent, do not work around it with another user’s account; ask an administrator to review your role.

Have valid **Store** records ready first. Those selections determine where this Customer Segment belongs and which later screens can find it.

Create a Customer Segment



The Customer Segments create screen in the Brisk documentation demo.

Create a Customer Segment after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first: **Store**.
2. Enter the required identifying and operational values: **Store**, and **Name**.
3. Review **Is Active**, and **Match Type** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Customer Segment, then confirm **Name** on its detail page before continuing.

After saving: Verify this Customer Segment in **Marketing Campaigns** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Delete a Customer Segment

Delete this Customer Segment only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

If the record is merely obsolete, use **Is Active** to remove it from future use while preserving existing references.

Before confirming, check for related **Marketing Campaigns**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Name**. After confirmation, return to the Customer Segments list and make sure only the intended Customer Segment was removed.

Review Customer Segment details

Use the detail page as the shared record of what this Customer Segment currently means. Verify **Is Active**, and **Match Type** before relying on it for a decision.

Follow **Store** to determine whether the issue is on this Customer Segment or on one of those linked records.

Next check: Verify this Customer Segment in **Marketing Campaigns** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

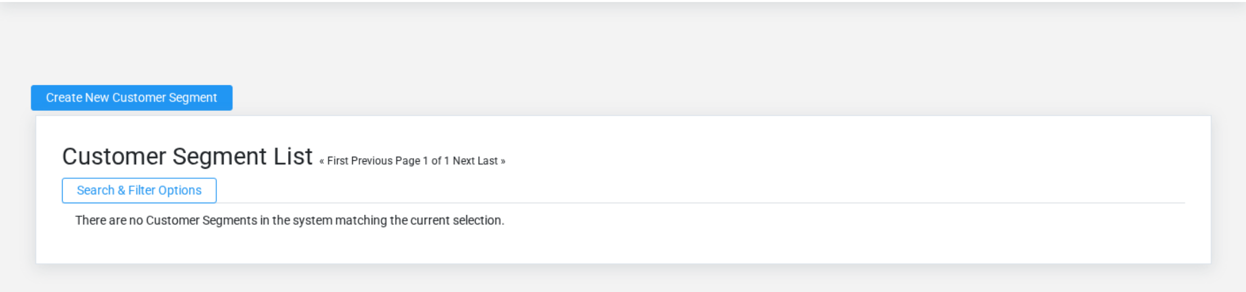
Edit an existing Customer Segment

Edit this Customer Segment to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Store** with the supporting document or approved request.
2. Recheck **Is Active**, and **Match Type**. These values are most likely to change storefront visibility, customer communication, payment, or fulfillment.
3. Save the change, return to the list, and confirm that the Customer Segment now appears under the expected **Is Active**, and **Match Type**.

After the change: Verify this Customer Segment in **Marketing Campaigns** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Find and review customer segments



The Customer Segments list screen in the Brisk documentation demo.

Use the Customer Segments list to find the correct record before opening or changing it. Compare **Name**. Records with similar names or numbers can still belong to different **Store**.

- Keyword search checks **Name**, **Slug**, and **Description**.
- Narrow the list with **Store** filters.
- The initial order emphasizes **Name**. Select a column heading when you need a different comparison.

Open the Customer Segment whose **Name** match the task. If it is missing, clear the list filters and recheck **Store**, **Is Active**, and **Match Type** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 9 user-relevant fields for this Customer Segment, including 1 linked-record selection and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Store	Yes	The store associated with this customer segment.
Name	Yes	Human-readable name for this customer segment.
Slug	No	URL-safe identifier for this customer segment.
Description	No	Description of this customer segment.
Is Active	No	Whether this customer segment is active.
Match Type	No	The match type recorded for this customer segment. Available values: All Rules Must Match, Any Rule Can Match.
Rules	No	List of rules. Example: [{"field":"total_orders","op":"gte","value":2}].
Estimated Size	No	The estimated size value recorded for this customer segment.
Last Evaluated At	No	Date and time recorded for last evaluated at on this customer segment.

What happens next

Verify this Customer Segment in **Marketing Campaigns** before staff build new activity on it; correct ownership, classification, and active state now rather than after transactions accumulate.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Store**, and **Name** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The record saved but is not available where expected:** Recheck **Is Active**, and **Match Type**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Store** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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