

Add restricted segmentations

To add a restricted segmentation based on a specific role, follow these steps:



1. Click , the following window appears:

A screenshot of a 'Create Segmentation Restriction' dialog box. The dialog has a blue header bar with the title 'Create Segmentation Restriction' and a close button (X) on the right. Below the header, there are three input fields: 'Account Type' with a dropdown arrow and a red asterisk, 'Role Name' with a red asterisk, and 'Segmentation' with a dropdown arrow. To the right of the 'Segmentation' field are two toggle switches: 'Not Viewable' and 'Not Editable'. At the bottom right of the dialog are two buttons: 'CANCEL' and 'SAVE'.

2. Select the account type then role name, each from its field,
3. Select the segmentation you want to restrict for the selected role,
4. Click the slider button next to Not viewable if you want to prevent the role users from viewing the retail window, the Not editable slider is automatically selected,
5. Click the slider button next to Not editable if you want to prevent the role users from editing the retail window,
6. Click **Save**, the restriction is added to the list.