

amasty

See the way the [Customer Group Auto Assign for Magento 2](#) extension works.

Guide for Customer Group Auto Assign for Magento 2

Change customer groups automatically with Customer Group Auto Assign extension for Magento 2. Use simple group switching rules to cut operating expenses and save time.

- Manage customer groups based on custom rules
- Use simple rules based on customer and order attributes
- Schedule the rules processing frequency with integrated Cron functionality
- Define rules processing order via prioritization
- Easily manage all group-switching rules in one place
- **NEW** | Show customer group status in the customer's account

Magento 2 Customer Group Auto Assign extension is compatible with [Hyvä themes](#). You can find the **amasty/module-customer-group-auto-assign-hyva** package for installing in composer suggest (Note: the compatibility is available as a part of an active product subscription or support subscription).

General Settings

To configure the **General** settings of the extension, please go to **Stores → Configuration → Amasty Extensions → Customer Group Assign**.

General

Enabled <small>[store view]</small>	<input type="text" value="Yes"/>
Customer Groups Update Schedule <small>[global]</small>	<input type="text" value="* * * * *"/>
	Enter cron expression
	* * * * *
	+---- Day of the Week (range: 0-6, 1 standing for Monday)
	+----- Month of the Year (range: 1-12)
	+----- Day of the Month (range: 1-31)
	+----- Hour (range: 0-23)
	+----- Minute (range: 0-59)
	Example: 0 0 * * * Daily at midnight
	Read more about cron expressions - here

In this tab you can activate/deactivate the module and set the schedule to timely change customer groups as the integrated Cron functionality allows to switch groups automatically.

Enabled - set to Yes to enable the module.

Customer Groups Update Schedule - specify rule processing frequency in a Crontab format.

Read more about cron expressions [here](#).

Rules Grid

To create custom rules and manage customer groups automatically, go to **Customers → Amasty Customer Group Auto Assign → Rules**.

Rules

Add New Rule

Filters

Actions ▼
3 records found
20 ▼ per page
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1
of 1
>

<input type="checkbox"/>	Rule Name	Destination Group	Priority	Status	Action
<input type="checkbox"/>	Switch to VIP	VIP (30% Discount)	1	ENABLED	Edit
<input type="checkbox"/>	Switch to Wholesale	Wholesale	2	ENABLED	Edit
<input type="checkbox"/>	Switch to Retailers	Retailer	3	ENABLED	Edit

Easily operate all group-switching rules on a handy grid. See **Rule Name**, **Destination Group**, **Priority** and **Status** in one place.

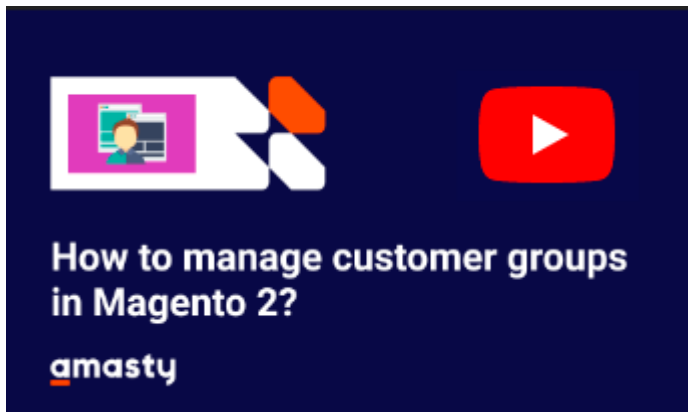
To change rule configuration, click *Edit* in the **Action** column.

Delete the rules separately or in bulk via **Actions** dropdown menu.

To set up a new custom rule, hit the **Add New Rule** button.

Rule Creating

See how to set up customer group rules in our video guide!



General Settings

New Rule

admin

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Save and Continue Edit

Save

General Settings

Rule Name * Switch to "10% discount" group (Number of completed orders)

Enabled Yes

Priority * 1

Destination Group * 10% discount

Rule Name - specify the title for the rule that will be displayed on the backend.

Enabled - set to Yes to activate the rule.

Priority - define the priority of rule execution. The lowest number is executed first.

Destination Group - choose the customer group to which the customers will be assigned if they meet the necessary conditions.

To view all existing customer groups, go to **Customers → Customer Groups**.

Customer Groups

🔍 admin ▾

[Add New Customer Group](#)

Search [Reset Filter](#) 8 records found per page of 1

ID	Group	Tax Class
<input type="text"/>	<input type="text"/>	<input type="text"/>
5	10% discount	Retail Customer
6	20% discount	Retail Customer
1	General	Retail Customer
8	Lifetime customers	Retail Customer
0	NOT LOGGED IN	Retail Customer
3	Retailer	Retail Customer
7	VIP (30% discount)	Retail Customer
2	Wholesale	Retail Customer

Edit the necessary group by simply clicking it or create a new one via **Add New Customer Group** button.

Conditions

In this tab configure group-switching rule conditions based on customer or order attributes.

Conditions

If **ALL** of these conditions are **TRUE** :

Please choose a condition to add.

Please choose a condition to add.

Conditions Combination

Customer attributes

- Associate to Website
- Create In
- Created At
- Created From
- Customer ID
- Date of Birth
- Default Billing Address
- Default Shipping Address
- Disable Automatic Group Change Based on VAT ID
- Email
- Lock Expire
- Failures Number
- First Failure Date
- First Name
- Gender
- Group
- Is Confirmed

Order attributes

- Number of Completed Orders
- Total Sales Amount
- Average Order Value
- Ordered Products By Condition**

With the condition tree, you are able to create as many conditions and their combinations as you want by clicking the green icon and choosing the necessary attribute from the dropdown menu.

In case you want to set several independent conditions and you need any of them for the rule to be applied, change 'All' value to 'Any'.

Conditions

Apply the rule only if the following conditions are met (leave blank for all products).

If

ALL	▲
ALL	
ANY	

 of these conditions are TRUE :

Two main groups of attributes are acceptable: **customer attributes** and **order attributes**.

- The list of **customer attributes** includes customer and account information, shipping and billing address details, personal data and etc.

For example, you can group customers by city, region or country. With the extension it is also possible to automatically move your clients registered for a particular time to a separate group and provide them with some special discounts or offers.

General Settings



Rule Name *

Enabled Yes

Priority *

Destination Group *

Lifetime customers	▼
--------------------	---

Conditions



If ALL of these conditions are TRUE :

Created At equals or less than 2010-01-01 00:00:00	🚫
	🟢

- **Order attributes** include the average order value, the number of completed orders, total sales

amount, and ordered products by condition.

For example, you can move customers whose total sales amount exceeds \$3 000 and the number of completed orders is greater than 30 to the “VIP” group offering 30% discount for all future orders.

General Settings

Rule Name *


Enabled Yes


Priority *

Destination Group * 

Conditions

If ALL of these conditions are TRUE :

Number of Completed Orders greater than 30 

Total Sales Amount equals or greater than 3000 



Click the **Save** button.

To avoid common mistakes while setting the conditions, check [this post](#).

NEW | Customer Group Settings

New Customer Group demouser

[← Back](#) [Reset](#) [Save Customer Group](#)

Group Information

Group Name *
Maximum length must be less then 32 characters.

Tax Class *

Show Customer Group on Storefront

Group Name - specify the group name based on your sales strategies and loyalty programs.

Tax Class - specify the tax class.

Show Customer Group on Storefront - enable the option to display customer group status in the customer account:

My Account 10% discount

My Orders

My Downloadable Products

My Wish List

Address Book

Account Information

Stored Payment Methods

My Account

Account Information

Contact Information

Veronica Costello
roni_cost@example.com
[Edit](#) | [Change Password](#)

See Amasty **Special Promotions Pro** for Magento 2 extension to increase your store average order value.

Find out how to install the Customer Group Auto Assign for Magento 2 via [Composer](#).

From:

<https://amasty.com/docs/> - **Amasty Extensions FAQ**

Permanent link:

https://amasty.com/docs/doku.php?id=magento_2:customer-group-auto-assign

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