

amasty

For more details see how the [Customer Segmentation for Magento 2](#) extension works.

Guide for Customer Segmentation for Magento 2

Arrange registered customers and guest visitors in segments based on orders, shipping addresses, shopping cart data and other parameters. Use multiple rule conditions to generate customer segments and schedule segmentation lists update by cron.

- Segment registered customers
- Segments unauthorized visitors
- Generate segments based on multiple criteria
- Create condition combinations
- Refresh segments by cron
- Export segmentation lists

Extension Configuration

To configure general extension settings please go to **Stores → Configuration → Customer Segments**

General Settings

Registered Customers Attributes
[global]

Is Confirmed

Created At

Associate to Website

Created From

Create In

Group

Disable Automatic Group Change Based on VAT ID

Name Prefix

First Name

Middle Name/Initial

Last Name

Name Suffix

Email

Cron Execution Time
[global]

Hourly

Two Times Per Day

Daily

Weekly

Monthly

Registered Customers Attributes - Select attributes that will be available for segmentation rules creation in the rule conditions tab.




Cron Execution Time - The module lets you automatically update segmentation lists according to a specific schedule. Specify the time interval for cron execution to update segments as often as you need.

Segments Grid


To access the **Segments Grid**, please go to **Admin Panel → Customers → All Customers →**

Customer Segments.


Manage Segments




Create New Segment



Filters

 Default View

 Columns

Actions

4 records found

20 per page

<

1 of 1

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<input type="checkbox"/>	ID	Segment	Status	Website	Action
<input type="checkbox"/>	33	Shipping to Canada	Active	Main Website	Edit
<input type="checkbox"/>	32	Complete Orders	Active	Main Website	Edit
<input type="checkbox"/>	31	Products Count in Cart	Active	Main Website	Edit
<input type="checkbox"/>	30	14 days from Last Completed Orders	Active	Main Website	Edit

To add a new customer segment click on the **Create New Segment** button. All created segments are displayed on the grid. Hit the **Edit** link in the right grid column to modify segment info.

General Settings

On the segment creation page please specify the following info: **name**, **description** and **website/store view** for each new segment.

Segment Information

Segment Name *

14 Days from Last Complete Order

Description

The list of customers who completed their last order more than 14 days ago.

Stores *

Main Website

English Store

Segment Conditions

If ALL of these conditions are TRUE :

Please choose a condition to add.

Please choose a condition to add.

Conditions Combination

Order *
Days From First Completed Order
Days From Last Completed Order
Used Payment Methods
Used Shipping Methods
Used Coupon
Orders Quantity by Condition
Total Amount by Condition
Average Order Total by Condition
Ordered Products by Condition

Billing Address *
Email
Billing City
Billing State/Province
Billing Country
Billing Zip

Shipping Address *
Shipping Zip

If ALL of these conditions are TRUE :

Please choose a condition to add.

Shipping Address *
Shipping Zip
Shipping State/Province
Shipping City
Shipping Country

Cart *
Days From Cart Created
Days From Cart Modified
Grand Total
Products Count

Registered Customers
Associate to Website
Date of Birth
Days Before Birthday
Days From the Last Visit
Days From the Registration
Email
First Name
Gender
Group

If ALL of these conditions are TRUE :

Please choose a condition to add.

Shipping Address *
Shipping Zip
Shipping State/Province
Shipping City
Shipping Country

Cart *
Days From Cart Created
Days From Cart Modified
Grand Total
Products Count

Registered Customers
Associate to Website
Date of Birth
Days Before Birthday
Days From the Last Visit
Days From the Registration
Email
First Name
Gender
Group

The module offers a great variety of rule conditions based on:

- Orders
- Billing and shipping addresses
- Shopping cart data
- Customer attributes
- Product attributes

You can create complex combinations and segment users by any specific parameter, e.g. by a specific coupon usage.

Keep in mind, that only native Magento coupons can be used as a segment condition.

NOTE: Conditions based on orders, billing/shipping addresses and cart attributes are available not only for registered customers but for **guest visitors** as well.

Segment List Generation

After the rule is applied you'll see all the customers meeting your conditions.

Matched Customers (3)								
<div><div> Filters</div><div> Export ▼</div><div> Default View ▼</div><div></div></div>								
First Name	Last Name	Email	Group	Phone	Country	State/Province	Customer Since	Is Guest
Veronica	Costello	roni_cost@example.com	General	(555) 229-3326	Canada	Ontario	Jun 15, 2017 9:13:16 AM	Not Guest
Jane	Green	jane@example.com	General	(554)523-3254	Canada	Alberta	Jun 27, 2017 2:17:44 PM	Not Guest
John	Doe	john.doe@example.com	General	(234)523-3267	Canada	Quebec	Aug 25, 2017 1:17:05 PM	Not Guest

Export - click 'Export' to download a segmented customers list in CSV or XML formats.

Find out how to install the **Customer Segmentation** extension for Magento 2 via [Composer](#).

Cart Price Rules Integration

You can use customer segments during the cart price rules configuration to make your promotions

more targeted and effective. Thus, it is easy to create promo campaigns for specific segments and provide an individual approach.

To configure the rules, proceed to **Marketing → Promotions → Cart Price Rules**.

Cart Price Rules

  admin ▾

[Add New Rule](#)

Search

[Reset Filter](#)

4 records found

20





per page

<

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of 1

>

ID	Rule	Coupon Code	Start	End	Status	Web Site	Priority ↓
<input type="text"/>	<input type="text"/>	<input type="text"/>	From  To 	From  To 	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	Buy 3 tee shirts and get the 4th free			--	Active	Main Website	0
2	Spend \$50 or more - shipping is free!			--	Active	Main Website	0
3	20% OFF Ever \$200-plus purchase!*			--	Active	Main Website	0
4	\$4 Luma water bottle (save 70%)	H20		--	Active	Main Website	0

Configure the rule you need as it is in the default Magento.


To apply the rule for a particular segment, open the *Conditions* section.


Buy 3 tee shirts and get the 4th free

Conditions

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

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

If an item is **FOUND** in the cart with **ALL** of these conditions true: 

Category is one of 25,16 



Please choose a condition to add. ▼

Please choose a condition to add.

Product attribute combination

Products subselection

Conditions combination

Cart Attribute

Subtotal (Excl. Tax)

Subtotal

Total Items Quantity

Total Weight

Payment Method

Shipping Method

Shipping Postcode

Shipping Region

Shipping State/Province

Shipping Country

Customers Segmentation

Segments

Here you can select the required segments created with the **Customer Segmentation** extension.

Buy 3 tee shirts and get the 4th free

Conditions

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

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

If an item is **FOUND** in the cart with **ALL** of these conditions true: ✖

Category is one of 25,16 ✖



Billing and Shipping Address

5 or More Days after First Completed Order

Orders Quantity is Greater than 3

Segments contains :



In our case, we made the rule available only for those customers who have more than 3 orders. Keep in mind, that only previously created segments will be able for creating rule conditions.

Save the rule.

To apply the changes, please, flush the cache and run reindex.

Cron Tasks List

Magento 2 Customer Segmentation extension is preintegrated with Cron Tasks List to provide store owners with an opportunity to track and manage all cron tasks running in the website background.

To view all scheduled and executed cron tasks, go to **System → Cron Tasks List**

Run all cron tasks and generate their schedule by clicking the 'Run Cron' button. Also you can delete separate tasks in bulk, apply filtering and sorting options when it is needed.

Cron Tasks List

Run Cron

Last Cron Activity: 20 seconds ago

Filters

Default View

Columns

Actions

652 records found

20 per page

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	ID	Job Code	Status ↑	Created At	Scheduled At	Executed At	Finished At
<input type="checkbox"/>	1038	sales_grid_order_shipment	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1058	sales_grid_creditmemo_async	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1078	sales_send_order_emails	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1098	sales_order_invoice_emails	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1118	sales_send_order_shipment	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1196	indexer_reindex_all_invalid	SUCCESS	Mar 18, 2019 5:47:13 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:21 AM	Mar 18, 2019 5:47:21 AM
<input type="checkbox"/>	1200	indexer_update_all_views	MISSED	Mar 18, 2019 5:47:13 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:21 AM	Mar 18, 2019 5:47:21 AM
<input type="checkbox"/>	1018	sales_grid_order_invoice_async	SUCCESS	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1024	sales_grid_order_invoice_async	PENDING	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:53:00 AM		
<input type="checkbox"/>	1025	sales_grid_order_invoice_async	PENDING	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:54:00 AM		

Compatibility with Abandoned Cart Email

Customer Segments are fully compatible with [Abandoned Cart Emails](#). Thus, you can configure highly-targeted email campaigns based on particular segments to return abandoning customers.

Select the required segment during the [rule configuration](#):

Editing Campaign Cart >\$100

Conditions

Conditions (don't add conditions if need all products)

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

Average Order Value is More Than \$500

Long-term Customers

Customers with 3 or More Products Purchased

Total Spent Amount is More Than \$10.000

Users from Canada

Segments contains :

Subtotal equals or greater than 100



Compatibility with Affiliate

The extension is compatible with the [Affiliate](#) module. It means that you can segment shoppers who made a purchase using an affiliate link.

To do this, install both extensions and choose a **Used Custom Affiliate Code** condition.

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

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Permanent link:

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