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 via cron, CLI, or admin option
- Export segmenation lists

# **Extension Configuration**

To configure general extension settings please go to **Stores**  $\rightarrow$  **Configuration**  $\rightarrow$  Customer **Segments** 

General Settings		
Registered Customers Attributes [global]	Is Confirmed	<b>^</b>
	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	
		11

**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 Q 🥵 🕹							
		Create New Segr	nent				
Search	n by keyword	Q Fi	ilters 💿	Default View 🔻 🏠 Co	lumns 👻		
Action	ns 🔻	4 records found 20	▼ per page	< 1 of	1 >		
	ID 1	Segment	Status	Website	Action		
	33	Shipping to Canada	Active	Main Website	Edit		
	32	Complete Orders	Active	Main Website	Edit		
	31	Products Count in Cart	Active	Main Website	Edit		
	30	14 days from Last Completed Orders	Active	Main Website	Edit		

To add a new customer segment click on the **Create New Segmen**t 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**, **website/store view**, and **status** for each new segment.

## 14 Days from Last Complete Order 💄 demouser 🗸 ← Back Save and Continue Edit Delete Segment **Refresh Segment Data** Save Segment Information 6 Segment Name \* 14 Days from Last Complete Order Description The list of customers who completed their last order more than 14 days ago. Main Website 8 Stores \*

Status Active 👻

Click the **Refresh Segment Data** option to update segment data (customer list) directly from the edit page.

The extension also allows you to refresh data of specific customer segments via **CLI (Command Line Interface)**. This feature is especially useful for refreshing segments with a large number of customers or complex conditions, helping to avoid long processing times and page timeouts.

Use the command below to refresh a specific segment:

```
bin/magento amasty:segments:refresh <id>
```

To refresh multiple segments, list their IDs separated by spaces:

```
bin/magento amasty:segments:refresh <id_1> <id_2> <id_3>
```

Please note that this feature is available as part of an active product subscription or support subscription. You can find the **amasty/module-customer-segmentation-subscriptionfunctionality** package for installing in composer suggest.

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### **Segment Conditions**

If ALL of these conditions are TRUE :

If ALL of these conditions are TRUE :

Please choose a condition to add.	•	Please choose a condition to add.	•
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 Ordered Products by Condition Ordered Products by Condition Ordered Products by Condition Billing Address * Email Billing City Billing State/Province Billing Zip Shipping Address *		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	
	Ť	P	

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 Geneartion

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

Matche	Matched Customers (3)							
			<b>Filt</b>	ers 📩	Export 🔻	•	efault View 🔻	\$
First Name	Last Name	Email	Group	Phone	Country	State/ Province	Customer Since	ls 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**  $\rightarrow$  **Promotions**  $\rightarrow$  **Cart Price Rules**.

Cart Price	e Rules					Q	👤 admin 👻
						Add	New Rule
Search Res	set Filter 4 record	ls found	20	▼ per pag	e <	1	of 1 >
ID	Rule	Coupon Code	Start	End	Status	Web Site	Priority I
			From 📰 To	From 📑 To	¥	¥	
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 produc



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 produc

If ALL of these condition	ns are <b>TRUE</b> :						
If an item is <b>FOUND</b> in the cart with <b>ALL</b> of these conditions true: 😣							
Category is one of	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 <b>contains</b> :	//	8					
۲							

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.

Cro	n Ta	sks List					
							Run Cron
							Kull Croit
0	Last	Cron Activity: 20 seconds ago					
					<b>T</b> Filters	s 💿 Default View	🗸 🔅 Columns 🗸
Activ	0.05				20 -	per page	1 of 33
Acti	UIIS	652 reco	rds found		LU	perpage	
	ID	Job Code	Status †	Created At	Scheduled At	Executed At	Finished At
	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
	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
	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
	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
	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
	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
	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
	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
	1024	sales_grid_order_invoice_async	PENDING	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:53:00 AM		
	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 highlytargeted 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 <b>contains</b> :		⁄⊿ ⊗				
Subtotal equals or greater than 100 🛞						
۲						

# **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.

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## Additional packages (provided in composer suggestions)

To make additional functionality available, please install the suggested packages you may need.

Available as a part of an active product **subscription** or support subscription:

• **amasty/module-customer-segmentation-subscription-functionality** - Install this package to enable CLI support for refreshing specific customer segments.

Find out how to install the Customer Segmentation 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\_segmentation

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