

**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 segmenation lists
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## Extension Configuration

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

## General Settings

### Registered Customers Attributes [global]

|                                     |  |
|-------------------------------------|--|
| <input type="checkbox"/>            | Is Confirmed                                   |
| <input type="checkbox"/>            | Created At                                     |
| <input checked="" type="checkbox"/> | Associate to Website                           |
| <input type="checkbox"/>            | Created From                                   |
| <input type="checkbox"/>            | Create In                                      |
| <input checked="" type="checkbox"/> | Group  |
| <input type="checkbox"/>            | Disable Automatic Group Change Based on VAT ID |
| <input type="checkbox"/>            | Name Prefix                                    |
| <input checked="" type="checkbox"/> | First Name                                     |
| <input checked="" type="checkbox"/> | Middle Name/Initial                            |
| <input checked="" type="checkbox"/> | Last Name                                      |
| <input type="checkbox"/>            | Name Suffix                                    |
| <input checked="" type="checkbox"/> | Email  |

### Cron Execution Time [global]

|                                  |                   |
|----------------------------------|-------------------|
| <input type="radio"/>            | Hourly            |
| <input checked="" type="radio"/> | Two Times Per Day |
| <input type="radio"/>            | Daily             |
| <input type="radio"/>            | Weekly            |
| <input type="radio"/>            | 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.




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## 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

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of 1

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

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



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## 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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| ID                   | Rule                                   | Coupon Code          | Start  | End  | Status               | Web Site             | Priority ↓           |
|----------------------|--|----------------------|--|--|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/>                   | <input type="text"/> | From <br>To  | From <br>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

1 of 33

|                          | 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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From:

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

Permanent link:

[https://amasty.com/docs/doku.php?id=magento\\_2:customer\\_segmentation](https://amasty.com/docs/doku.php?id=magento_2:customer_segmentation)

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