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For more details see how the Customer Segmentation for Magento 2 extension works.

Guide for Customer Segmentation for Magento 2

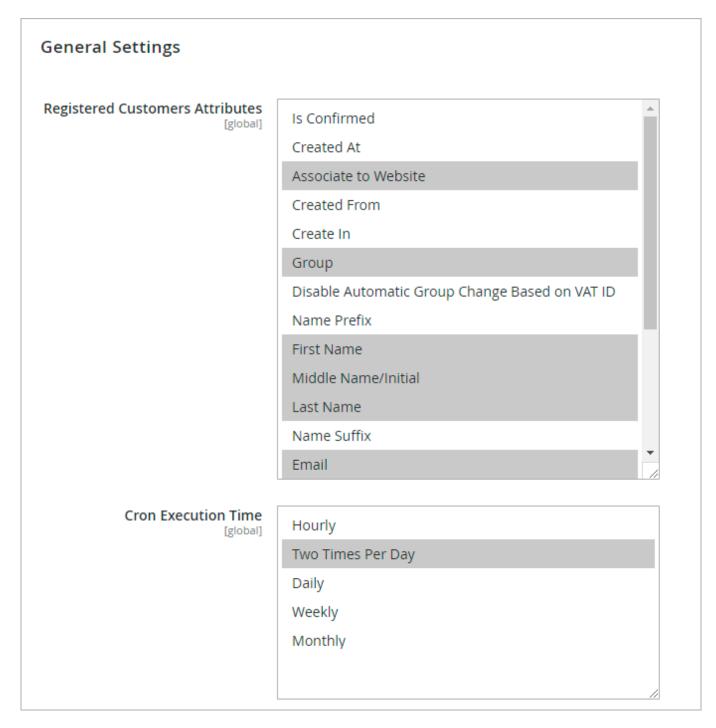
Arrange registered customers and guest visitors in segments based on orders, shipping addresses, shopping cart data and other parameters. Use multiple rule conditions to generate customer segments and schedule segmentation lists update by cron.

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

Extension Configuration

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





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

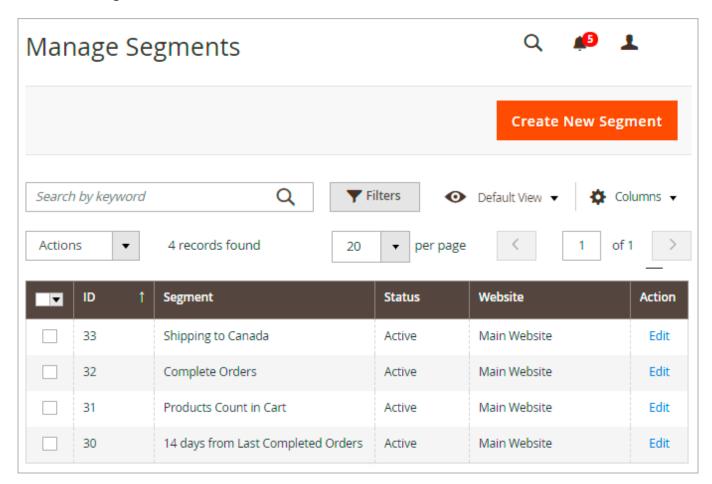
Cron Execution Time - The module lets you automatically update segmentation lists according to a specific schedule. Specify the time interval for cron execution to update segments as often as you need.

Segments Grid

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



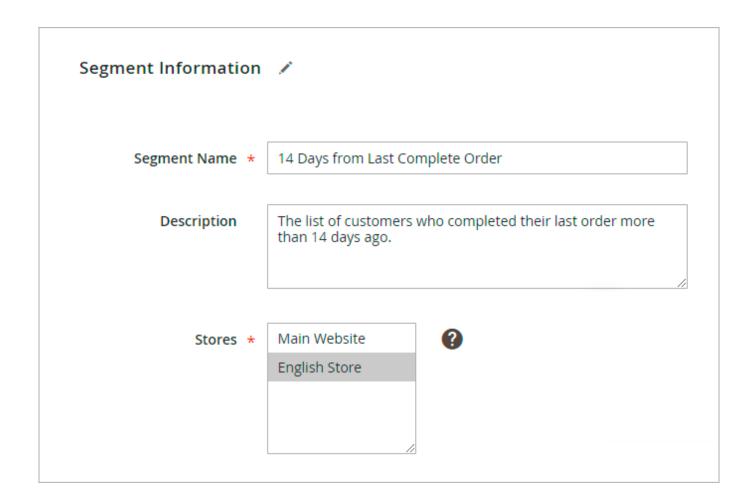
Customer Segments.



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

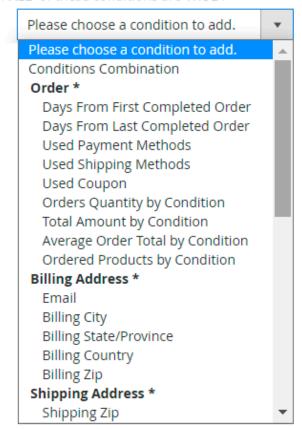
On the segment creation page please specify the following info: **name**, **description** and **website/store view** for each new segment.



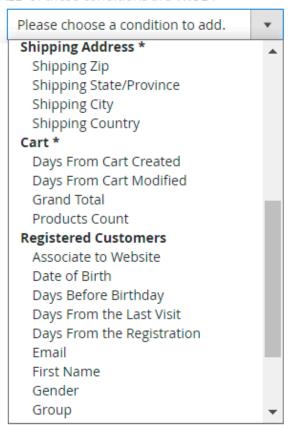
Segment Conditions



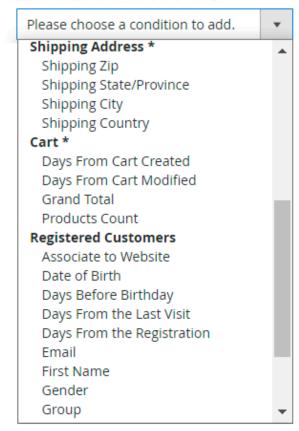
If ALL of these conditions are TRUE:



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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 **quest visitors** as well.

Segment List Geneartion

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



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.

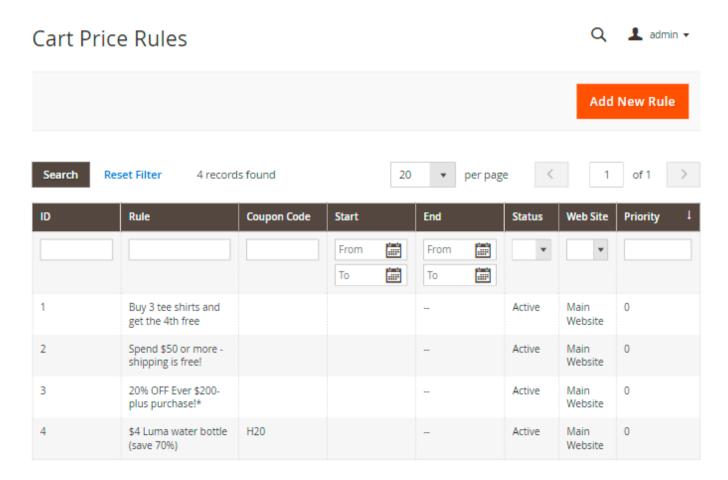
Cart Price Rules Integration

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**.



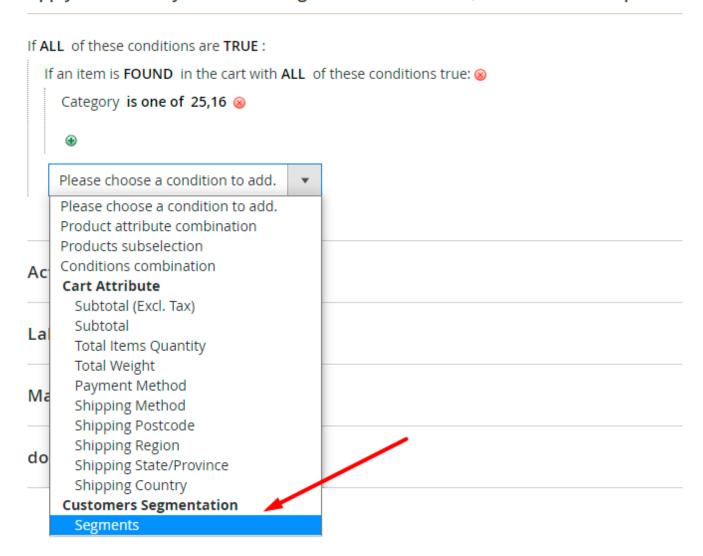
Configure the rule you need as it is in the default Magento.

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

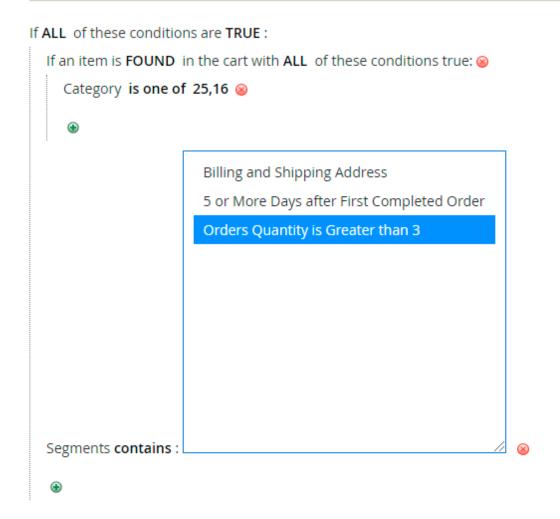


Here you can select the required segments created with the **Customer Segmentation** extension.

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



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.

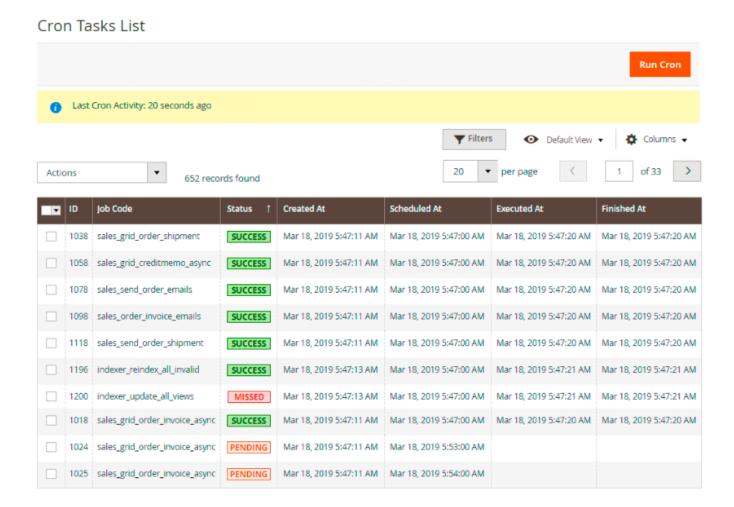


Cron Tasks List

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.



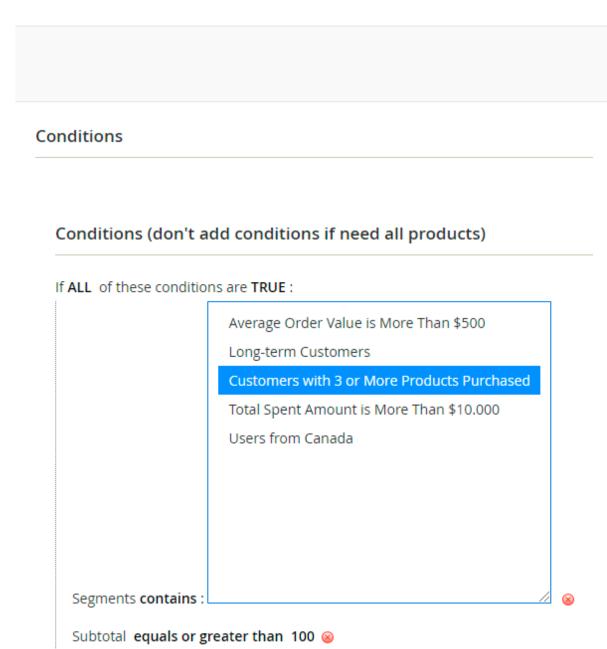
Compatibility with Abandoned Cart Email

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



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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