

Customer Segmentation

for Magento 2



Table of contents

Introducing Customer Segmentation for Magento 2.....	3
Customizing segments.....	3
Customer Segments Page.....	3
New Segment and Edit Segment Pages.....	4
Conditioning the segments.....	5
Checking segmented customers.....	7
Integrating Customer Segmentation.....	8
Cart Price Rules Integration.....	8
Native Magento Newsletter Integration.....	9
Customer Segmentation Use Cases.....	10

Introducing Customer Segmentation for Magento 2

Magento 2 Customer Segmentation is a tool for segmenting customers according to their sales history, buying behavior and other personal details.

Compatibility: Magento Open Source 2.2.X – 2.3.X, Magento Commerce 2.2.X – 2.3.X

The **Customer Segmentation extension for Magento 2** presents a tool to draw various segments of customers according to a number of customized rules and conditions. With the extension you are able to:

- Segment both **registered** and **guest** customers;
- Customize **rules** and conditions for segmentation against a **variety of parameters**;
- Use **customers purchase track record, personal details** and other information as parameters **for segmentation**;
- Integrate the extension with the native Magento Newsletter and Cart Price Rules;
- **Move** segments to **groups**;
- Export segmented data to **CSV** or **XML**.

Customizing segments

To start work with the **Magento 2 Customer Segmentation** go to **Customers > Customer Segmentation by Aheadworks > Customer Segments**.

Customer Segments Page

This is where you may view, edit the segments as well as add new ones. The segments are allocated into a table with four columns: **Rule ID, Segment, Website, Status and Newsletter Subscription Status**, which represent some most important details of segments settings. The table is easily customizable and searchable with the '**Columns**', '**Default View**' and '**Filters**' active elements on the top right of the page.

Should you require further support beyond the present manual click 'Customer Segments' folding list and opt for Get Support.

You may **enable**, **disable** or **delete** available segments individually or in bulk. Tick the boxes next to the chosen segments on the left of the table, click the '**Actions**' folding list and opt for an operation.

To edit a segment click the active link of the segment name, to add a new segment click the '**Add New Segment**' button on the top right of the page. These operations will take you to the **Edit/New Segment** page.

The screenshot displays the 'Segments' management page in a Magento system. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Segments' and includes a search bar, a notification bell with '8' alerts, and a user profile 'master'. Below this is a dropdown menu for 'Customer Segments' and an orange 'Add New Segment' button. Further down are controls for 'Filters', 'Default View', and 'Columns'. A table shows 7 records found, with 20 items per page. The table has columns for 'Rule ID', 'Segment', 'Website', 'Status', and 'Newsletter Subscription Status'. The segments listed are:

Rule ID	Segment	Website	Status	Newsletter Subscription Status
1	SKU WH11 in June	All Websites	Enabled	Anyone
2	Not US Customers	All Websites	Enabled	Anyone
3	Ordered a product 2 times	All Websites	Enabled	Subscribers only
4	Purchased min 3 times since 01/01/2017	All Websites	Enabled	Subscribers only
5	Purchased at least 2 times during year Gross > \$200	All Websites	Enabled	Subscribers only
6	Ordered Adidas in May 2019	All Websites	Enabled	Subscribers only
7	Have account but no orders	All Websites	Enabled	Subscribers only

New Segment and Edit Segment Pages

The New Segment and Edit Segment pages look identical, the name suggests the operation you are to do with the segment. This is where you may alter or add all the details of the segment, define rules for segmentation, and look up for matched customers.

The image below reflects some basic details you are suggested to provide for each segment. They are as follows:

- **Status** - enable or disable the segment here;
- **Segment Name** - provide a name for the segment;
- **Description** - give details on the segment;
- **Assign to Website/Store view** - the extension will index the data from the selected websites and store views only;

- **Newsletter Subscription Status** - opt for a subscription status of customers who fall under the segment.

The screenshot shows the 'Edit Segment' interface. The sidebar on the left contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main area has a header 'Edit Segment' with a search icon, a notification bell with '8', and a user profile 'master'. Below the header is a breadcrumb 'Customer Segments' and action buttons: 'Back', 'Delete', 'Reset', and 'Save'. The segment is 'Enabled' (toggle is on). The 'Segment Name' is 'SKU WH11 in June 2019' and the 'Description' is 'Customers who bought items EoS Neck Hoodies (SKU WH11) in June 2019.'. The 'Assigned to Website/Store view' dropdown is open, showing options: 'All Store Views', 'Main Website', 'Main Website Store' (selected), and 'Default Store View'. The 'Newsletter Subscription Status' is set to 'Anyone'. At the bottom, there are sections for 'Conditions' and 'Matched Customers', each with a refresh icon.

The extension will reindex all enabled segments daily, so it is recommended to disable the unused ones to save time on reindexing.


Prior settings of the segment sorted, you may now proceed to the Conditions block of the segment.

Conditioning the segments

The Conditions block of the Edit/New Segment page allows:

- **Validating Customer Emails** - enter emails of customers you think fall under segmentation for quick and fast check whether they really do so;
- **Customizing rules for segmentation** - provide rules for segmentation here.

Unlike building a whole segment, the Validating Customer Emails option doesn't require reindexing, so it is a good option to verify whether the rule you have created is correct.

To **add** conditions for segmentation click  and choose an attribute for conditioning. For further configuration proceed to the '**ALL**', '**TRUE**', '**IS**', '...' and other clickable parameters to alter them in accordance with your rule.

From a performance perspective, it is recommended to put date conditions on a level as high as possible.

The rule set, proceed to one of the following:

- **New segment** - click the '**Save**' button and **reindex** the rule.
- **Edit segment** - click the '**Save**' button, **reindex** the rule and **refresh** the page.

Run the following commands for reindexing:

1. In the SSH console of your server, navigate to your store root folder:

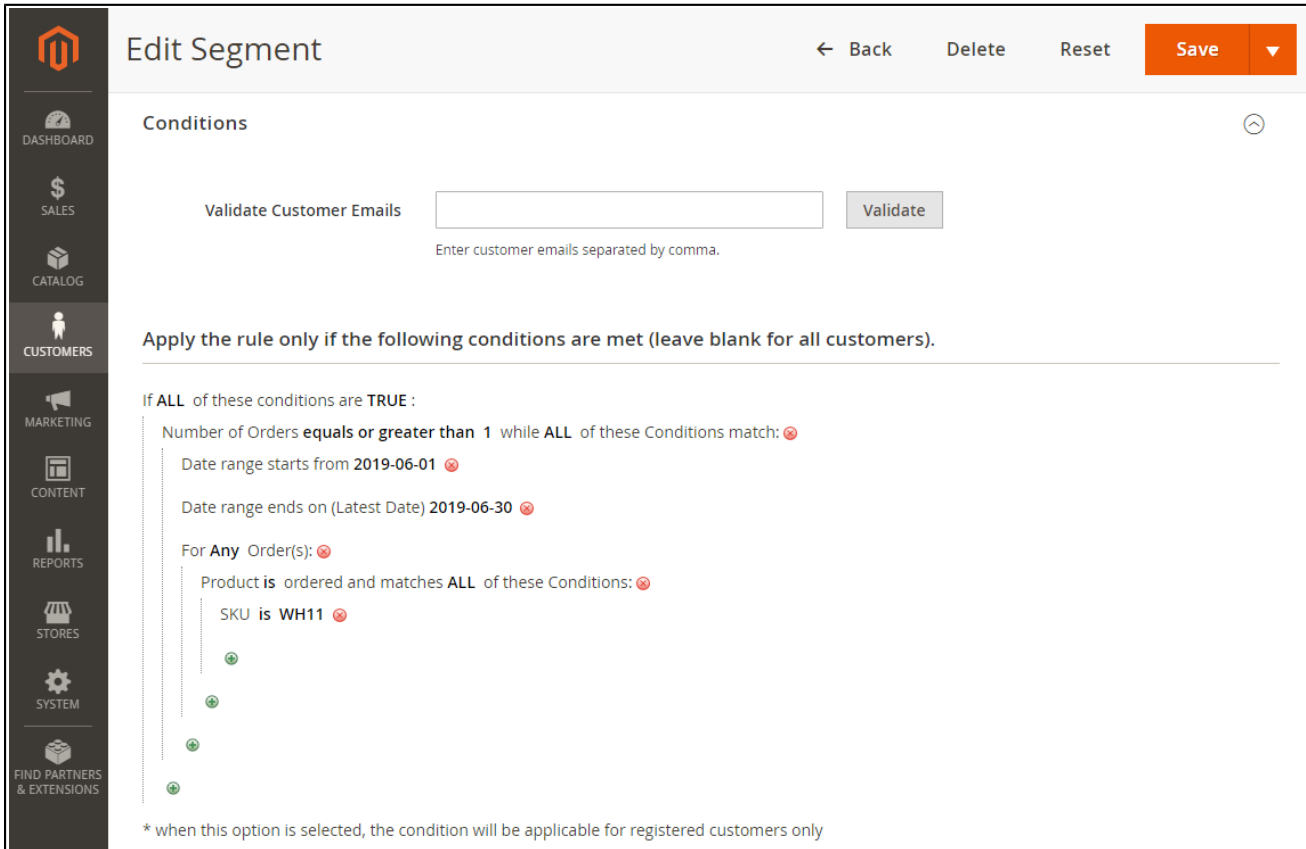
```
cd path_to_the_store_root_folder
```

run the following command:

```
php -f bin/magento index:reindex aw_customer_segmentation
```

Please proceed to the Segmentation Use Cases to familiarise yourself with some examples of most demanded rules for segmentation.

To **delete** a condition click  .



Once the rule is set, saved and reindexed, you will be able to check the customers who match the segmentation, move them to groups or export to CSV.

Checking segmented customers

After reindexing is done, scroll down the **Edit/New Segment** page to the '**Matched Customers**' block to check the customers who match the segmentation. The list comes as a table with the following columns, the names of which speak for their content: **Name**, **Email**, **Group**, **Country**, **Phone**, **Zip**, **State**, **City** and **Address**. You may customize the view of the table the '**Columns**', '**Default View**' and '**Filters**' active elements on the top right of the page.

To **export** the segment click '**Export**'  **Export** ▼ and choose the format of the file: CSV or XML.

To **move** the segment to a group select the customer entries, click '**Actions**' and then '**Move to customer group**'. A list of groups available will pop-up, where you will be able to finalize the operation.

Edit Segment ← Back Delete Reset Save

Matched Customers (Refresh)

Filters Default View Columns Export

Actions 3 records found 20 per page 1 of 1

		Email	Group	Country
<input type="checkbox"/>	Veronica Costello	roni_cost@example.com	General	US
<input type="checkbox"/>	Jeanne D'Arlene	jeanne.darlene@yahoo.com	NOT LOGGED IN	FR
<input type="checkbox"/>	Stanley Fortuna	stanley.fortuna@gmail.com	NOT LOGGED IN	US

Integrating Customer Segmentation

Customer Segmentation for Magento 2 allows for a few useful integrations, which help your promotional campaigns be more targeted and therefore effective. Once installed the module will integrate itself into the **Cart Price Rules** and **Native Magento Newsletter**.

Cart Price Rules Integration

To **fine-tune your coupons and other discounts** which are to be applied at the check-out or in cart with regard to a particular customer segment go to **Marketing > Cart Price Rules**. Pick up a rule from the list or start a new one. Complete the essentials and move down to the **Customer Segments**. Here you will find a list of segments available for selection.

Once you make up your choice and finalize the settings, the discount or coupon will be available only to registered customers in the chosen segment.

50% Summer Hoodies Sale

Customer Groups * NOT LOGGED IN

- General
- Wholesale
- Retailer

Customer Segments

- Not US Customers
- Ordered a product 2 times
- Ordered Adidas in May 2019
- Purchased at least 2 times during year | Gross > \$200
- Purchased min 3 times since 01/01/2017
- SKU WH11 in June

Selected segments will work for registered customers only.

Coupon * Specific Coupon

Coupon Code * SUMMERHOODIE

Use Auto Generation

Native Magento Newsletter Integration

To personalize your email newsletters you may resort to a Customer Segments block too. This time you will have to proceed to **Marketing > Newsletter Queue**. Click a queue for editing and scroll the list of settings down to the Customer Segments block. Finalize the queue, save the newsletter, and it will only be delivered to those registered customers who fall into the chosen segment.

Edit Queue

Customer Segments

- Have account but no orders
- Not US Customers
- Ordered a product 2 times
- Ordered Adidas in May 2019
- Purchased at least 2 times during year | Gross > \$200
- Purchased min 3 times since 01/01/2017
- SKU WH11 in June

Customer Segmentation Use Cases

Below you may find some sample rules for segmentation of customers alongside the explanations for the use cases.

1. List of clients who ordered a specific product at least 2 times

If ALL of these conditions are TRUE :

- Number of Orders equals or greater than 2 while ALL of these Conditions match: ❌
- Total number of items purchased equals or greater than 2 for ALL of these Conditions match: ❌
- SKU is 24-MB01 ❌

“Number of Orders equals or greater than 2” filters out the customers who have only 1 order which contains 2 items of the same SKU. If this is not essential, you can set that value to 1.

2. List of clients who made a purchase at least 3 times since 11/01/2017

If ALL of these conditions are TRUE :

- Number of Orders equals or greater than 3 while ALL of these Conditions match: ❌
- Date range starts from 2017-01-11 ❌

3. List of clients who made a purchase at least two times during the past year for a global amount equals or greater than 200€

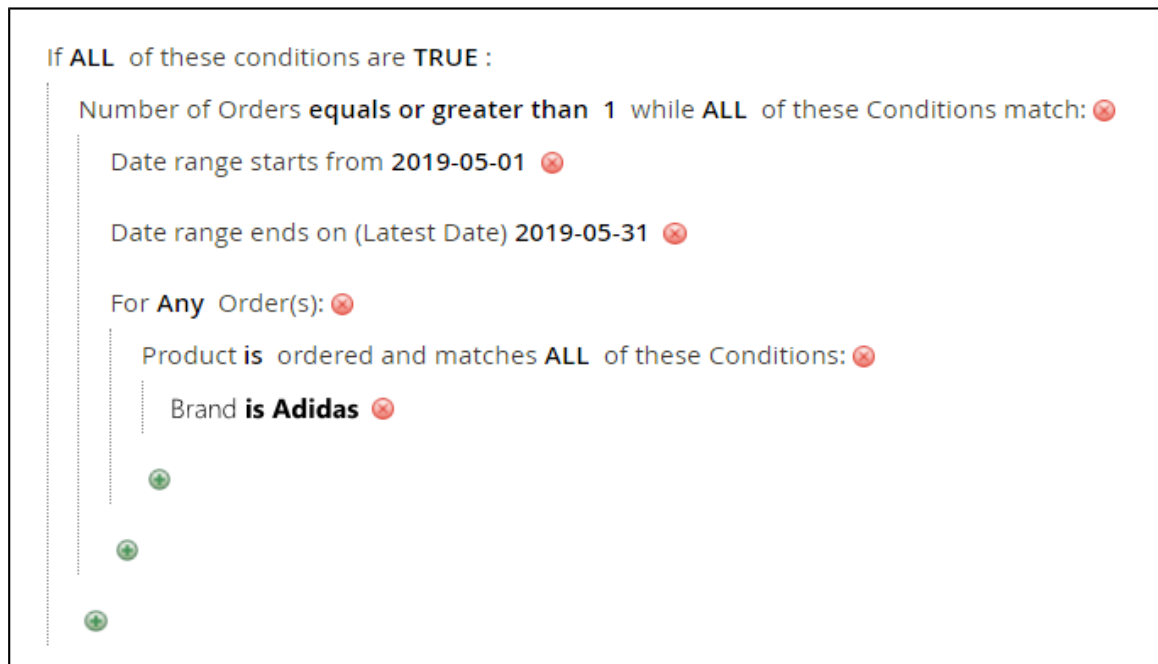
If ALL of these conditions are TRUE :

- Number of Orders equals or greater than 2 while ALL of these Conditions match: ❌
- Total sales amount equals or greater than 200 ❌
- Date period started 365 Day(s) ago ❌

4. List of clients who ordered products of a specific brand in May 2019

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

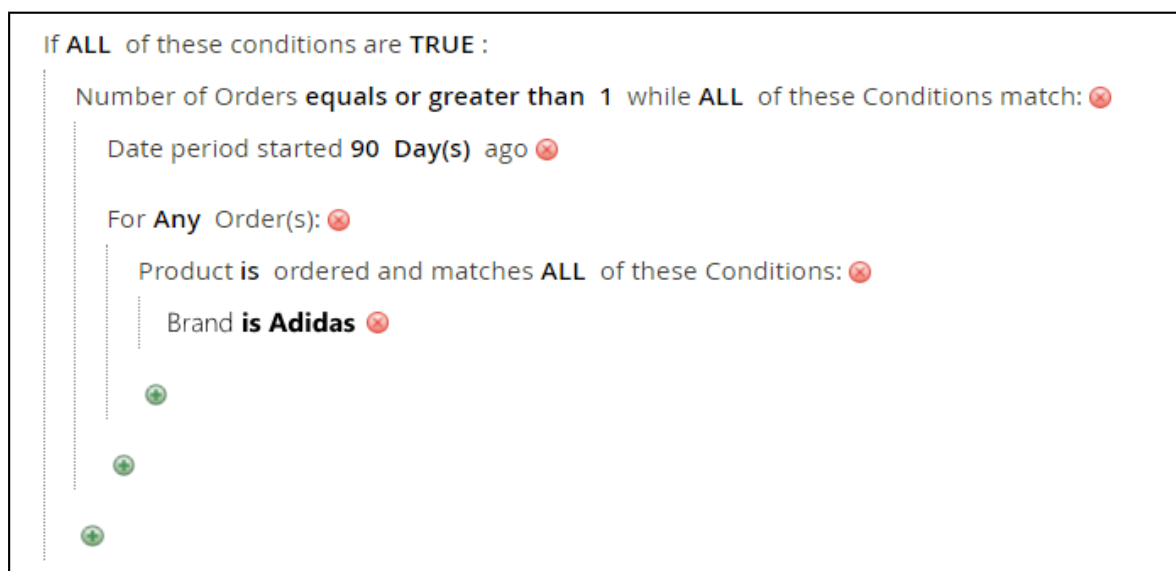
- Number of Orders **equals or greater than 1** while **ALL** of these Conditions match: ❌
- Date range starts from **2019-05-01** ❌
- Date range ends on (Latest Date) **2019-05-31** ❌
- For **Any** Order(s): ❌
 - Product **is** ordered and matches **ALL** of these Conditions: ❌
 - Brand **is Adidas** ❌



5. List of clients who ordered products of a specific brand in the last 3 months

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

- Number of Orders **equals or greater than 1** while **ALL** of these Conditions match: ❌
- Date period started **90 Day(s) ago** ❌
- For **Any** Order(s): ❌
 - Product **is** ordered and matches **ALL** of these Conditions: ❌
 - Brand **is Adidas** ❌



Same idea as in the previous example with the only difference: Date From/To is replaced with the Date Period.

From a performance perspective, it is recommended to put the date conditions on a level as high as possible. For example, same result can be obtained should you do otherwise, however, such configuration will require an additional subrequest. While this will not be noticeable in smaller stores, it can save some time on reindexing in the stores with 100k+ orders.

6. List of clients who ordered a product from the specific categories

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

- Number of Orders **equals or greater than 1** while **ALL** of these Conditions match: ❌
- For **Any** Order(s): ❌
 - Product is ordered and matches **ALL** of these Conditions: ❌
 - Category is one of 3,4 ❌

7. List of clients who has the order(s) with a total of 100€ or more

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

- Number of Orders **equals or greater than 1** while **ALL** of these Conditions match: ❌
- For **Any** Order(s): ❌
 - Order Total **equals or greater than 100** : ❌

8. List of clients whose billing address is not in USA

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

- Customer Addresses match **ALL** of these conditions: ❌
 - Billing address matches **ALL** of these conditions: ❌
 - Country is not United States ❌

9. List of clients who have an account but did not order

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

- Number of Orders is **0** while **ALL** of these Conditions match: ❌
 - Group * is one of General, Retailer, Wholesale ❌

In this example, all customer groups were selected.

10. List of female clients older than 50 years old

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

- Gender * is Female ❌
- Date of Birth* ❌
 - Date range ends on (Latest Date) 1969-05-24 ❌

11. List of clients who used a promotion code at least once

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

- Number of Orders **equals or greater than 1** while **ALL** of these Conditions match: ❌
 - For **Any** Order(s): ❌
 - Coupon was used **Yes** ❌

12. List of clients who bought a printer more than a year ago, but didn't order ink or toner for the last year

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

- Number of Orders **equals or greater than 1** while **ALL** of these Conditions match: ❌
 - Date period ended **366 Day(s)** ago ❌
 - For **Any** Order(s): ❌
 - Product **is** ordered and matches **ALL** of these Conditions: ❌
 - Category **is Printers** ❌
 - +
 - +
 - +
- Number of Orders **is 0** while **ALL** of these Conditions match: ❌
 - Date period started **365 Day(s)** ago ❌
 - For **All** Order(s): ❌
 - Product **is** ordered and matches **ALL** of these Conditions: ❌
 - Category **is Ink & Toner** ❌
 - +
 - +
 - +
 - +

For an in-depth look visit Customer Segmentation demo store at the [extension's product page](#).

Feel free to contact our support team with any questions:

helpdesk@aheadworks.com

Call us:

US: +1 (646) 480 - 0154

UK: +44 (20) 8133 - 0154