

Auto Customer Group Switching extension User Manual



Auto Customer Group Switching Extension by MageComp moves users to specific customer groups based on order total, order count, account age, product IDs and category IDs.

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Note: Every time when user logged in to their customer account, cron job will run & checks the condition. if condition will fulfill, customer group switching will take effect on next log in.

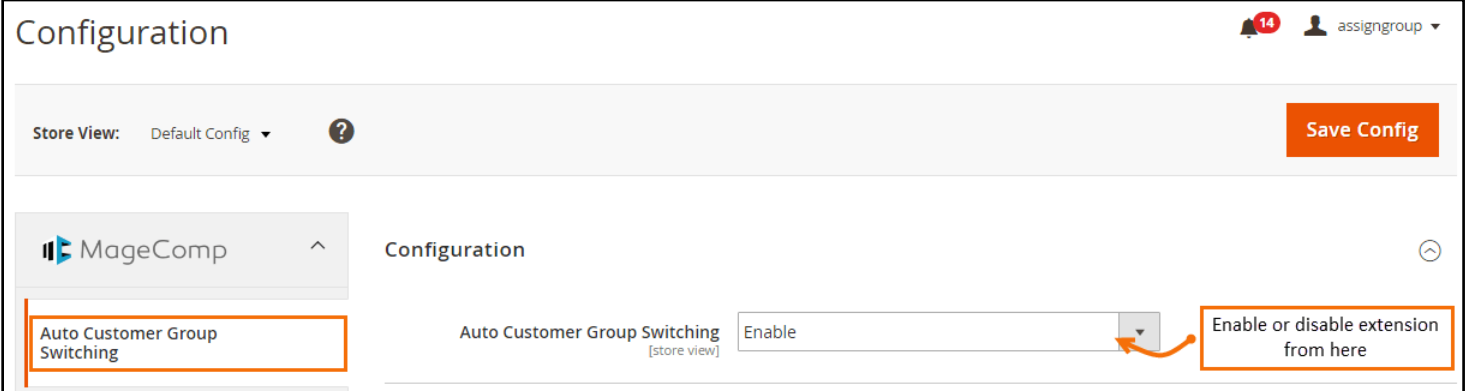
1. Extension Installation Guide

- Go to My downloadable products. The file that you download normally is a zip file.
- Use FTP client (such as Filezilla, WinSCP, cuteFtp) to upload or copy all folders in the zip package to your Magento site root folder. This will not overwrite any existing files, just add new files to the folder structure.
- Open Command line in folder root of Magento and run following command respectively:
 - `php bin/magento setup:upgrade`
 - `php bin/magento setup:static-content:deploy`
 - `php bin/magento indexer:reindex`
 - `php bin/magento cache:flush`
- Navigate to Stores/Configuration, if you can see the extension tab, it is installed properly.
- If you need professional help regarding Magento Extension Installation, Feel free to contact us any time.

2. Configuration

Once you have successfully installed the extension, go to **Stores → Configuration** to configure the extension for use. Here you can find setting to enable or disable the extension.

Auto Customer Group Switching: Enable or disable extension from here.



The screenshot shows the Magento Configuration interface. At the top, there's a 'Configuration' header with a notification bell (14) and a user profile 'assigngroup'. Below that, the 'Store View' is set to 'Default Config'. A 'Save Config' button is visible on the right. The 'MageComp' extension is selected in the left sidebar. The main configuration area shows 'Auto Customer Group Switching' with a dropdown menu set to 'Enable'. An orange box highlights the dropdown menu, and a callout box with an arrow points to it, containing the text 'Enable or disable extension from here'.

3. Sales Based Group Switching Settings

Once you have enabled the extension, you can see the settings to configure the extension to enable customer group switching based on sales.

Note: Only those orders are counted, which status is complete.

- **Auto Assign Groups Based on Order Total:** Enable it to switch customer group based on order total.
- **Switch to Customer Group:** Select group to switch customers if set condition for order total is met.
- **Minimum Order Total:** Enter minimum order total to switch customers to selected group.
- **Auto Assign Groups Based on Number Of Orders:** Enable it to switch customer group based on number of orders.

- **Switch to Customer Group:** Select group to switch customers if set condition for number of orders is met.
- **Minimum Number of Orders:** Set minimum number of orders to switch customers to selected group.

Sales Based Group Switching Settings ⌵

Auto Assign Groups Based on Order Total <small>[store view]</small>	<input type="text" value="Enable"/>	<div style="border: 1px solid orange; padding: 2px;">Enable group switch based on order total</div>
Switch To Customer Group <small>[store view]</small>	<input type="text" value="Retailer"/>	<div style="border: 1px solid orange; padding: 2px;">Select customer group to switch to</div>
Minimum Order Total <small>[store view]</small>	<input type="text" value="10"/>	<div style="border: 1px solid orange; padding: 2px;">Enter minimum order total to perform switching</div>
Auto Assign Groups Based on Number of Orders <small>[store view]</small>	<input type="text" value="Enable"/>	<div style="border: 1px solid orange; padding: 2px;">Enable group switch based on total number of orders</div>
Switch To Customer Group <small>[store view]</small>	<input type="text" value="Wholesale"/>	<div style="border: 1px solid orange; padding: 2px;">Select customer group to switch to</div>
Minimum Number of Orders <small>[store view]</small>	<input type="text" value="50"/>	<div style="border: 1px solid orange; padding: 2px;">Enter minimum number of orders to perform switching</div>

4. Account Age Based Group Switching Settings

Here you can find settings to configure the extension to enable customer group switching based on account age.

- **Auto Assign Groups Based on Age of Customer's Account:** Enable it to switch customer group based on customer's account age i.e age from date of account creation.
- **Switch to Customer Group:** Select group to switch customers if set condition for account age is met.
- **Minimum Age of Customer Account:** Enter minimum age by means of days to switch customers to selected group.

Account Age Based Group Switching Settings ⌵

Auto Assign Groups Based on Age of Customers' Account <small>[store view]</small>	<input type="text" value="Enable"/>	<div style="border: 1px solid orange; padding: 2px;">Enable group switch based on account age</div>
Switch To Customer Group <small>[store view]</small>	<input type="text" value="General"/>	<div style="border: 1px solid orange; padding: 2px;">Select customer group to switch to</div>
Minimum Age of Customer Account (In Days) <small>[store view]</small>	<input type="text" value="30"/>	<div style="border: 1px solid orange; padding: 2px;">Enter minimum account age to perform switching</div>




Account age is counted from the day of customer registration.

5. Product Based Group Switching Settings

Here you can find settings to configure the extension to enable customer group switching based on categories.

- **Auto Assign Groups Based on Products:** Enable it to switch customer group based on products.
- **Switch to Customer Group:** Select group to switch customers if set condition for products is met.
- **Enter Product IDs:** Enter comma separated product IDs to switch customers to selected group.

Product Based Group Switching Settings

Auto Assign Groups Based on Products <small>[store view]</small>	Enable		Enable group switch based on products
Switch To Customer Group <small>[store view]</small>	General		Select customer group to switch to
Enter Product IDs <small>[store view]</small>	201, 17, 87		Enter comma separated product IDs to perform switching




Enter comma separated product IDs.

6. Category Based Group Switching Settings

Here you can find settings to configure the extension to enable customer group switching based on products.

- **Auto Assign Groups Based on Categories:** Enable it to switch customer group based on categories.
- **Switch to Customer Group:** Select group to switch customers if set condition for category is met.
- **Enter Category IDs:** Enter comma separated category IDs to switch customers to selected group.

Category Based Group Switching Settings

Auto Assign Groups Based on Categories <small>[store view]</small>	Enable		Enable group switch based on categories
Switch To Customer Group <small>[store view]</small>	General		Select customer group to switch to
Enter Category IDs <small>[store view]</small>	13, 7		Enter comma separated category IDs to perform switching

Enter comma separated category IDs.

7. Multiple Group Switching based on Sales Order Total

Extension facilitates to set implementing multiple group switching based on order total. You can set multiple order total conditions from here.

Sales Order Total Based Group Switching Settings 1 Multiple group switching settings based on order total

Auto Assign Groups Based On Sales Order Total 1 [store view] Enable group switch based on order total

Switch From Customer Group [store view] Select customer group from you want to switch to based on set order total

Switch To Customer Group [store view]

Minimum Order Total [store view] Enter minimum and maximum order total amount to perform switching

Maximum Order Total [store view]

Sales Order Total Based Group Switching Settings 2

Sales Order Total Based Group Switching Settings 3

Sales Order Total Based Group Switching Settings 4

Sales Order Total Based Group Switching Settings 5

8. Email Settings

Here you can find settings to configure the extension to send Email notifications to admin for group switching.

- **Send Emails To:** Enter a valid Email ID of admin to get notifications on.
- **Email Sender:** Select Email sender.
- **Email Template:** Select Email template for the notification Email to admin.

Email Settings

Send Emails To
[store view]

Email ID of admin to receive customer group switch notifications

Enter Email ID to send customer group switching notification to admin

Email Sender
[store view]

General Contact

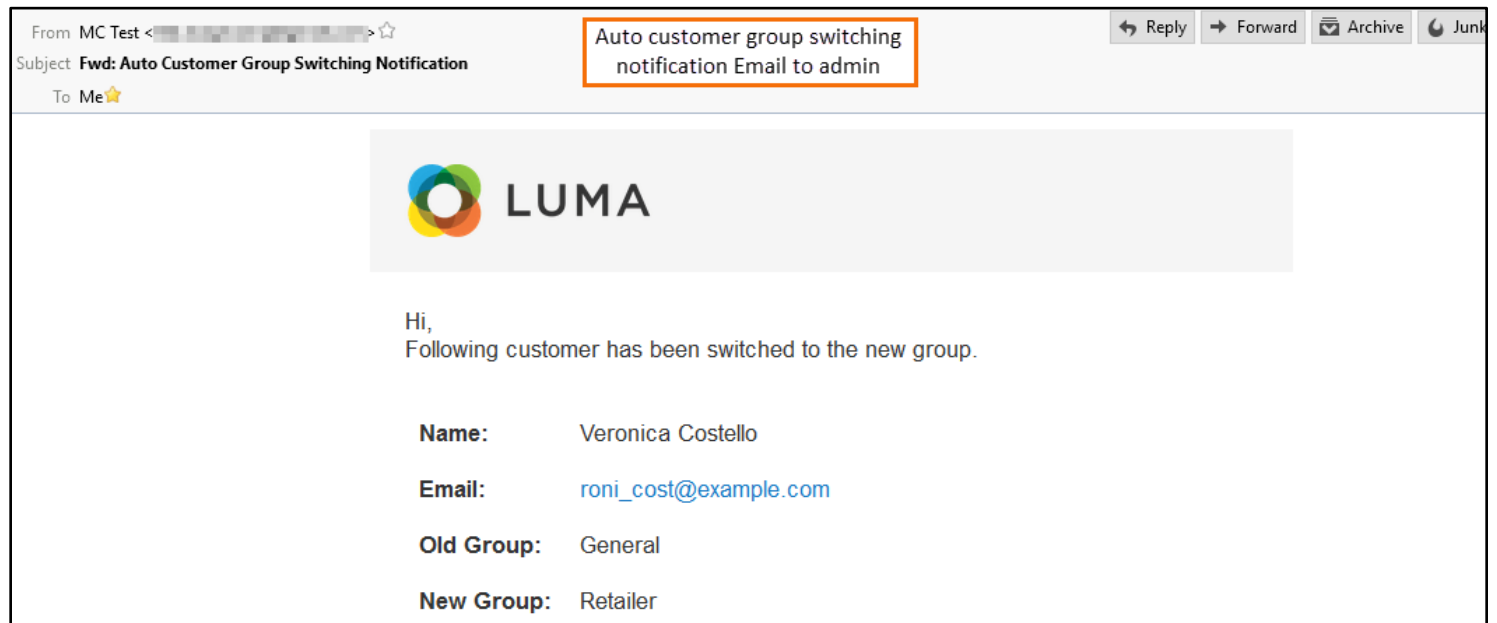
Select Email sender and template for the notification mail

Email Template
[store view]

Assign Customer Groups (Default)

9. Auto Customer Group Switching Email to Admin

Once a customer is switched based on set conditions, Email notification is sent to admin.



10. Deactivation of Extension in Case of Emergency

- Go to `app` → `etc` → `config.php` and find `'Magecomp_Assigngroups'=> 1`, and replace 1 with 0.
- If something goes wrong, please contact us at <https://www.magecomp.com/helpdesk> or send us an email at helpdesk@magecomp.com

11. FAQs

- **What if I get "Access denied" error after installation of the extension?**
Whenever you get Access denied error while clicking on the extension tab after installation, log out admin panel and re-login.