



# Automatic Customer Group Switching Magento Extension

## User Manual

This is the user manual of Automatic Customer Group Switching v1.9.3 and was last updated on 26-07-2017. To see what this extension can do, go to the [Automatic Customer Group Switching product page](#). You can find the full release info and version history of this extension [here](#).

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# Configuring Customer Group Switching Rules

To create and manage your customer group switching rules, navigate to **Customers > Automatic Customer Group Switching** in the top Admin Panel menu.

Add a new rule by clicking the button in the top right corner of the page, or select an existing rule from the Automatic Customer Group Switching Rules grid to modify it.

Automatic Customer Group Switching Rules Add New Rule

Page 1 of 1 pages | View 20 per page | Total 10 records found Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions Submit

	ID	Name	Original Customer Group(s)	New Customer Group(s)	Active	Active From	Active To	Stop Processing	Priority
Any	From:					From:	From:		From:
	To:					To:	To:		To:
<input type="checkbox"/>	1	Customer Account Age	Wholesale Private Sales Member	VIP Member	Active			No	1
<input type="checkbox"/>	2	Newsletter Subscription	General	Newsletter Discount Group	Active	1 Jan 2015		No	0
<input type="checkbox"/>	3	Customer E-mail Address	General	Educational Institutions	Active			No	3
<input type="checkbox"/>	4	Customer Gender & Age	General Private Sales Member	Promotional E-mails	Active	1 Oct 2015	31 Dec 2015	No	1
<input type="checkbox"/>	5	Shipping & Billing Address	General	United States Shipping	Active			No	0
<input type="checkbox"/>	6	Total Turnover	Wholesale	VIP Member	Active			Yes	0
<input type="checkbox"/>	8	Single Order Attributes	Wholesale Private Sales Member	Shipping Discount Group	Active			Yes	1
<input type="checkbox"/>	9	Ordered Products	Wholesale Private Sales Member	Quantity Discount Group	Active		31 Dec 2015	Yes	2
<input type="checkbox"/>	10	Membership Products	General	Monthly Membership	Active			Yes	0
<input type="checkbox"/>	11	Recurring Profiles	General Private Sales Member	Active Paypal Profiles	Active			Yes	0

Use the following tabs of the rule view menu to create and configure your automatic group switching rules:

- Rule Information
- Rule Conditions
- Rule Action
- E-mail Notifications

# Rule Information

In the Rule Information tab you can:

- Enter a rule name for admin reference.
- Enable the rule by setting its status to 'active'.
- Select the website for which the group switching rule should be used.
- Optionally set a date range during which the rule should be executed.
- Define the rule's execution priority, starting with 0 as the first rule to be processed.

### Rule Information

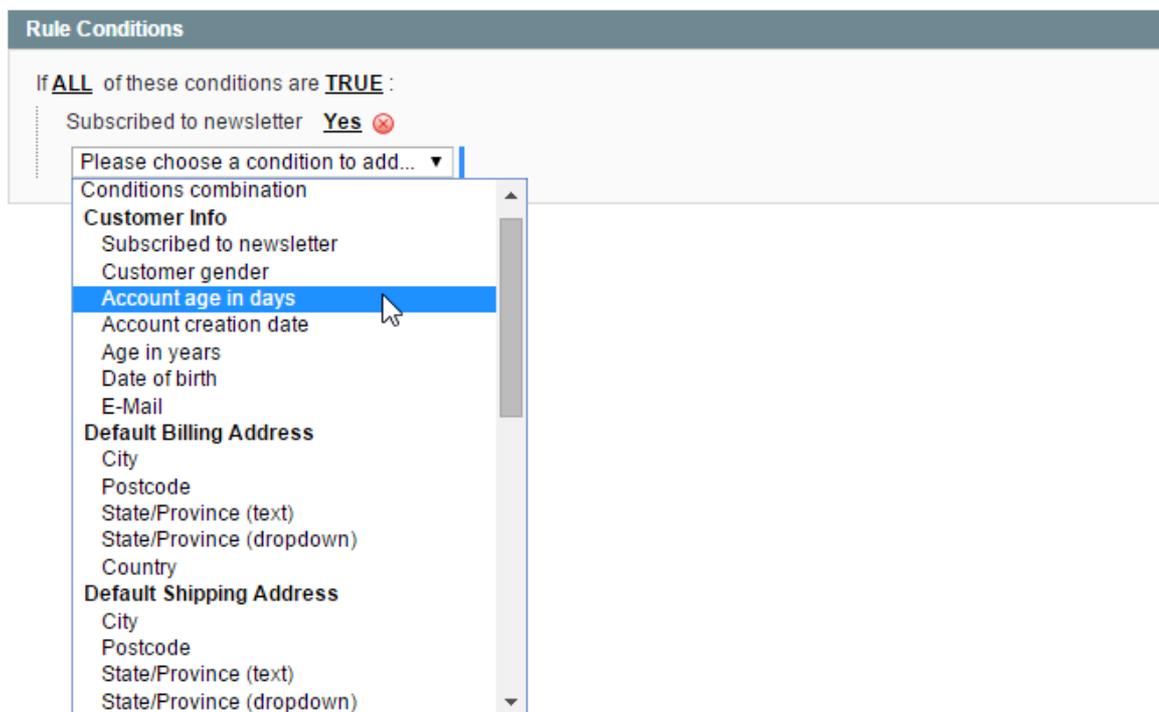
Rule Name *	<input type="text" value="Newsletter Subscription"/>
Status *	<input type="text" value="Active"/>
Websites *	<div><div><input type="text" value="Main Website"/></div></div>
From Date	<input type="text" value="01/01/2015"/> 
To Date	<input type="text" value=""/> 
Priority	<input type="text" value="0"/>

# Rule Conditions

In the Rule Conditions tab you can define the conditions that have to be met in order to automatically switch a customer to another group and select the applicable invoice and order status(es) for each rule.

## Adding Rule Conditions

Click the green + icon to select a rule condition from a categorized dropdown menu.



The group switching rule conditions are divided into the following categories:

## Customer Group Switching Rule Conditions

Customer Info	Single Order Totals (Entire Order History)	Sum of Invoice Totals
First / Last / Middle Name Prefix / Suffix Email Gender Date of Birth Age in Years Created at Account Age in Days Subscribed to Newsletter Tax/VAT Number Disable Automatic Group Changed Based on VAT ID + Any custom customer attribute	Order Attribute Combination <i>If an item is found in the order history...</i> Order Subselection <i>If total quantity is ... for a subselection of orders in the order history...</i>  Order Attributes: Subtotal (incl. / excl. Tax) Grand Total (incl. Tax) Shipping Costs (incl. / excl. Tax) Discount Amount Shipping Discount Amount Tax Amount Tax Percentage Total Invoiced (incl. / excl. Tax) Total Invoiced - Total Refunded (incl. / excl. Tax) Total Paid Total Refunded Total Paid - Total Refunded Total Items Total Weight Coupon Code Coupon Rule Name Order State Order Status Order ID Order Increment ID VAT Number Currency Code Shipping Method Shipping / Billing Address Attributes	Subtotal (incl. / excl. Tax) Grand Total (incl. Tax) Shipping Costs (incl. / excl. Tax) Total Items  Ordered Products (Order History / New Orders) Product Attribute Combination <i>If an item is found in the order history / in the cart...</i> Product Subselection <i>If total quantity is ... for a subselection of items in the order history / in the cart...</i>  Product Attributes: Name Category SKU Price Type Attribute Set Total Product Turnover (incl. / excl. Tax) Total Quantity Ordered + Any custom product attribute Cart Item Attributes: Price in Cart Quantity in Cart Row Total in Cart
Default Shipping / Billing Address		
City Postcode State/Province (text / dropdown) Country		
Sum of Order Totals		
Subtotal (incl. / excl. Tax) Grand Total (incl. Tax) Total Invoiced (incl. / excl. Tax) Total Invoiced - Total Refunded (incl. / excl. Tax) Total Paid Total Refunded Total Paid - Total Refunded Shipping Costs (incl. / excl. Tax) Total Items Total Weight		
	Recurring Profiles	
	Attribute Combination <i>If a recurring profile is found...</i>  Attributes: Profile State Product SKU Product Quantity	

- **Customer Info**: set up rules based on customer attributes and account information.
- **Default Billing & Shipping Address**: group customers based on their default billing or shipping address details.
- **Sum of Invoice & Order Totals**: switch customers based on aggregated sales attributes such as their monthly turnover or total shipping costs.
- **Single Order Totals**: move customers based any single order attribute combination or order subselection.
- **Ordered Products**: switch customers based on any product attribute combination or product subselection from their order history or from new orders only. Please note that you can only select product attributes that are enabled for Shopping Cart Price Rules. To enable a product attribute, go to **Catalog > Attributes > Manage Attributes** using the top Admin Panel menu. Select an attribute from the grid and enable the 'Use for Promo Rule Conditions' option in the Frontend Properties section of the Properties tab.
- **Recurring Profiles**: move customers based on their recurring PayPal profile state and product SKU/quantity.

You can find example rules for each of the above mentioned condition categories in

our Automatic Customer Group Switching demo store .

## Configuring Rule Conditions

You can add as many conditions as you want by clicking the green + icon, or click the red x icon to remove a condition.

**Rule Conditions**

If ALL of these conditions are TRUE :

Subscribed to newsletter Yes ✕

+

All underlined values in the Rule Conditions tab can be modified by clicking on them. Depending on the rule condition, you can manually enter a condition value or select one from a dropdown menu.

**Rule Conditions**

If ALL of these conditions are TRUE :

Subscribed to newsletter Yes ✕

Account age in days is 180 ✕

- is
- is not
- equals or greater than
- equals or less than
- greater than
- less than
- is one of
- is not one of

When configuring rules based on a specific order history time frame, you can click the calendar icon next to the input field to open a date picker.

**Rule Conditions**

If ALL of these conditions are TRUE :

If an item is FOUND in the order history on and between dates 14/05/2015 and 14/05/2015, with ALL of these conditions true: ✕

+

+

May, 2015							×
Today							
Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
17						1	2
18	3	4	5	6	7	8	9
19	10	11	12	13	14	15	16
20	17	18	19	20	21	22	23
21	24	25	26	27	28	29	30
22	31						

Select date

Some condition values, such as categories and product SKUs, can be selected from a list box by clicking the list icon next to the input field.

**Rule Conditions**

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

If an item is **FOUND** in the order history **on and between dates** **01/05/2015** and **30/05/2015** , with **ALL** of these conditions true: 

Category **is**    

- Default Category (1)
- Women (52)
- Men (70)
- Accessories (58)
- Home & Decor (40)
- Sale (9)
- VIP (6)

### Applicable Order and Invoice Statuses

The applicable order and invoice status(es) for each group switching rule can be selected in the bottom section of the Rule Conditions tab. If a rule includes conditions based on order or invoice information, it will only be executed when the selected order and invoice status(es) apply.

**Applicable Order and Invoice Statuses**

Included order status(es) \*

- Complete
- Declined Ogone
- Suspected Fraud
- On Hold
- Payment Review
- PayPal Canceled Reversal
- PayPal Reversed
- Pending**
- Pending Ogone
- Pending Payment

Included invoice status(es) \*

- Pending**
- Paid**
- Canceled

# Rule Action

In the Rule Action tab you can choose from and to which group(s) a customer should be moved and configure the rule processing options.

## Selecting Customer Groups

Select the group(s) from which the customer should be moved at 'Original Customer Group(s)'.

Select the group where the customer should be moved to at 'New Customer Group'.

If multiple groups are selected, the new group will be automatically chosen from the selection in a round-robin manner, meaning that customers will be evenly distributed over the selected groups.

You can create and manage your customer groups by navigating to **Customers > Manage Customers** in the top Admin Panel menu.

## Rule Processing Events

You can select the event(s) on which the rule should be executed at 'Rule Processing Event(s)'.

The rule processing events include actions related to customer accounts, orders and invoices, default shipping and billing address, recurring profiles and newsletter subscriptions.

Besides that it's also possible to process group switching rules on demand or periodically.

## Stop Further Rules Processing

If you have created multiple group switching rules, it's possible that a customer can be classified into more than one customer group based on the configured rule conditions. The processing order of rules is defined by their priority, which can be set in the Rule Information tab. If you want to prevent customers from switching to another group after a certain rule, you can enable the 'Stop Further Rules Processing' option at the bottom of the Rule Actions tab.

## Assign New Group at Checkout

By enabling the 'Assign New Group at Checkout' option, the new customer group will be already assigned to new orders during checkout. By default the group switching rule is processed *after* placing an order, so the new customer group won't apply to the new order yet.

## Rule Action

Original Customer Group(s) \*

General	▲
Wholesale	
VIP Member	
Private Sales Member	
Monthly Membership	
United States Shipping	
Newsletter Discount	
Promotional E-mails	
Quantity Discount	
Shipping Discount	▼

▲ The group(s) from which the customer will be removed.

New Customer Group \*

General	▲
Wholesale	
VIP Member	
Private Sales Member	
Monthly Membership	
United States Shipping	
Newsletter Discount	
Promotional E-mails	
Quantity Discount	
Shipping Discount	▼

▲ The group to which the customer will be moved. If multiple groups are selected, the new group will be chosen from the selection in a round-robin manner.

Rule Processing Event(s) \*

Customer account creation & saving	▲
Customer account log in	
Order creation & saving	
Invoice creation & saving	
Default billing / shipping address saving	
Recurring profiles creation & saving	
Newsletter subscription creation & saving	
Cronjob group switching batch	
	▼

▲ The event(s) on which the rule should be executed.

Stop Further Rules Processing \*

No	▼
----	---

▲ If multiple rules apply to the customer, stop further rule processing after this rule.

Assign New Group at Checkout \*

Yes	▼
-----	---

▲ Assign the new customer group to orders already during checkout instead of after placing an order.

# E-mail Notifications

In the E-mail Notifications tab you can optionally enable the notifications that are sent to the customer and/or admin when customers are moved to a new group.

**Customer Notification**

Enable Customer Notification \*    
▲ Notify customers by e-mail when they are moved to a new group.

Notification Subject \*

Notification Content \*

**B I U ABC** | | Styles | Paragraph | Font Family | Font Size

Dear {{var customer.getName()}},

We'd like to notify you that your account has been moved from the {{var from\_group.customer\_group\_code}} group to the {{var to\_group.customer\_group\_code}} group.

Best regards,

{{var store.getFrontendName()}}

Path: p

**Admin Notification**

Enable Admin Notification \*    
▲ Notify admin by e-mail when customers are moved to a new group.

Admin E-mail Address    
▲ Leave empty to use the default store e-mail address.

Notification Subject \*

Notification Content \*

**B I U ABC** | | Styles | Paragraph | Font Family | Font Size

Customer {{var customer.getName()}} (ID: {{var customer.getId()}}) has been moved to a new customer group.

**Original customer group:**  
{{var from\_group.customer\_group\_code}}

**New customer group:**  
{{var to\_group.customer\_group\_code}}

Path: p

## E-mail Variables

The e-mail subject and content of the customer and admin notifications support the use of the variables which are listed in the 'E-mail Variables' section, as well as custom variables and customer attributes.

## E-mail Variables

The e-mail notification subject and content support the use of the variables listed below, as well as custom variables and customer attributes.

Variable	Description
{{var customer.getName()}}	Full customer name
{{var customer.firstname}}	Customer first name
{{var customer.lastname}}	Customer last name
{{var customer.email}}	Customer e-mail address
{{var customer.getId()}}	Customer ID
{{var from_group.customer_group_code}}	Group name from which the customer is moved
{{var from_group.customer_group_id}}	Group ID from which the customer is moved
{{var to_group.customer_group_code}}	Group name to which the customer is moved
{{var to_group.customer_group_id}}	Group ID to which the customer is moved
{{var store.getFrontendName()}}	Store name
{{var store.getBaseUrl()}}	Store URL

# Executing Customer Group Switching Rules

Automatic Customer Group Switching includes several options to execute rules: on specific rule processing events, on demand (single rule or mass action) and periodically using Cron.

## Executing Rules On Demand

There are two options for executing group switching 'on demand'.

Individual rules can be processed by clicking the 'Save and Execute' button in the top right corner of the rule view.

The screenshot shows the 'Edit Customer Group Switching Rule' interface for a rule named 'Total Turnover'. At the top, there are several action buttons: 'Back', 'Reset', 'Delete Rule', 'Save And Execute', 'Save Rule', and 'Save And Continue Edit'. The 'Save And Execute' button is highlighted with a mouse cursor. Below the buttons is the 'Rule Information' section, which includes a form with the following fields:

- Rule Name: Total Turnover
- Status: Active
- Websites: Main Website
- From Date: [Empty]
- To Date: [Empty]
- Priority: 0

It's also possible to bulk process multiple rules at once by selecting them from the Automatic Customer Group Switching Rules grid. Choose the 'Execute Selected Rules On Demand' option from the Actions dropdown menu in the top right corner of the page and click 'Submit' to mass execute the selected rules.

The screenshot shows the 'Automatic Customer Group Switching Rules' grid. At the top right, there is an 'Add New Rule' button. Below the grid, there are pagination controls: 'Page 1 of 1 pages | View 20 per page | Total 10 records found'. There are also 'Reset Filter' and 'Search' buttons. The grid has a table with the following columns: 'ID', 'Name', 'Original Customer Group(s)', 'New Customer Group(s)', 'Active', 'Active From', 'Active To', 'Stop Processing', and 'Priority'. The 'Actions' column contains a dropdown menu with 'Execute Selected Rules On Demand' selected and a 'Submit' button. The grid contains 11 rows of rules, each with a checkbox in the 'Actions' column.

ID	Name	Original Customer Group(s)	New Customer Group(s)	Active	Active From	Active To	Stop Processing	Priority
1	Customer Account Age	Wholesale Private Sales Member	VIP Member	Active			No	1
2	Newsletter Subscription	General	Newsletter Discount	Active	Jan 1, 2015		No	0
3	Customer E-mail Address	General	Educational Institutions	Active			No	3
4	Customer Gender & Age	General Private Sales Member	Promotional E-mails	Active	Oct 1, 2015	Dec 31, 2015	No	1
5	Shipping & Billing Address	General	United States Shipping	Active			No	0
6	Total Turnover	Wholesale	VIP Member	Active			Yes	0
8	Single Order Attributes	Wholesale Private Sales Member	Shipping Discount	Active			Yes	1
9	Ordered Products	Wholesale Private Sales Member	Quantity Discount	Active		Dec 31, 2015	Yes	2
10	Membership Products	General	Monthly Membership	Active			Yes	0
11	Recurring Profiles	General Private Sales Member	Active Paypal Profiles	Active			Yes	0

A rule execution page will appear which shows which rule(s) and the amount of customers being

processed, as well as an overview of the group switching activity per customer.

✔ The rule has been saved.

### Executing Customer Group Switching Rules

[Go Back](#)

**Included Rules:**

ID	Name	Priority
5	Shipping & Billing Address	0

**Progress:**

Customers Processed	Total Customers	Percent Complete
54	54	100.00%

**Rule execution results**

ID	Name	From Group	To Group	Date / Time
137	Demo User	General	No group change	2016-08-15 17:26:10
136	Jane Doe	General	United States Shipping	2016-08-15 17:26:09
135	John Doe	General	United States Shipping	2016-08-15 17:26:09
127	John Smith	VIP Member	No group change	2016-08-15 17:26:07
104	Drew France	VIP Member	No group change	2016-08-15 17:26:07
103	Milo Viti	Private Sales Member	No group change	2016-08-15 17:26:07
102	Erich Forbes	General	United States Shipping	2016-08-15 17:26:07
101	Jerry Luke	VIP Member	No group change	2016-08-15 17:26:06
100	Jane Smith	VIP Member	No group change	2016-08-15 17:26:06
99	Clay Lock	General	United States Shipping	2016-08-15 17:26:06
98	Theo Porras	General	United States Shipping	2016-08-15 17:26:06
97	Percy Pella	Private Sales Member	No group change	2016-08-15 17:26:06

## Cronjob Configuration

The extension includes an integrated Cron functionality for periodical batch processing of customer group switching rules.

To process a rule using Cron, select 'Cronjob group switching batch' in the Rule Processing Events menu.

To configure the extension's Cronjob settings, navigate to **System > Configuration** in the top Admin Panel menu and select **Customer Group Auto-Switching** from the left side menu.

In the Cronjob Configuration screen you can define the rule processing frequency in Crontab format, set the maximum amount of customers to be processed per Cron batch and choose to execute the Cronjob only once daily.

Click the 'Save Config' button in the top right corner of the page to save any changes made to the Cronjob configuration.

Cronjob Configuration		
Rule processing frequency	<input type="text" value="*/5 1-3 ***"/>	[GLOBAL]
	▲ Enter rule processing frequency in Crontab format. Eg. */5 1-3 *** will execute Crobjob every 5 minutes between 1am - 4am.	
Maximum amount of customers	<input type="text" value="1000"/>	[GLOBAL]
	▲ Maximum amount of customers to be processed per Cron batch. The system might run into memory limit issues with too high amounts.	
Process rules only once daily	<input type="text" value="Yes"/>	[GLOBAL]
	▲ If set to yes, all rules will be executed by Cron maximum once a day per customer.	

