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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 segmentation lists

Extension Configuration

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

General Settings

Registered Customers Attributes [global]

- Is Confirmed
- Created At
- Associate to Website
- Created From
- Create In
- Group
- Disable Automatic Group Change Based on VAT ID
- Name Prefix
- First Name
- Middle Name/Initial
- Last Name
- Name Suffix
- Email

Cron Execution Time [global]

- Hourly
- Two Times Per Day
- Daily
- Weekly
- 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.

Segments Grid

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

Customer Segments.

Manage Segments

[Create New Segment](#)

Search by keyword

Actions 20 per page

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

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 *

Description

Stores *



Segment Conditions

Conditions

Apply the rule only if the following conditions are met (leave blank for all products)

If ALL of these conditions are TRUE :

The image shows two side-by-side dropdown menus for selecting conditions. Both menus have a header that says "Please choose a condition to add." with a downward arrow. The left menu is open, showing a list of conditions grouped into categories: "Conditions Combination", "Order *" (with sub-items: Days From First Completed Order, Days From Last Completed Order, Used Payment Methods, Used Shipping Methods, Orders Quantity by Condition, Total Amount by Condition, Average Order Total by Condition, Ordered Products by Condition), "Billing Address *" (with sub-items: Email, Billing City, Billing State/Province, Billing Country, Billing Zip), and "Shipping Address *" (with sub-items: Shipping Zip, Shipping State/Province). The right menu is also open, showing conditions grouped into categories: "Cart *" (with sub-items: Days From Cart Created, Days From Cart Modified, Grand Total, Products Count), "Registered Customers" (with sub-items: Associate to Website, Date of Birth, Days Before Birthday, Days From the Last Visit, Days From the Registration, Email, First Name, Gender, Group, Is Newsletter Subscriber, Last Name, Middle Name/Initial), and "Products" (with sub-item: Viewed Products by Condition).

The module offers a great variety of rule conditions based on:

- Orders
- Billing and shipping addresses
- Shopping cart data
- Customer attributes
- Product attributes

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)

Filters | Export | Default View | Settings

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

Add New Rule

Search

Reset Filter





4 records found

20

per page

1

of 1

ID	Rule	Coupon Code	Start	End	Status	Web Site	Priority
			From  To 	From  To 			
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 ✖



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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

The screenshot displays the 'Cron Tasks List' interface. At the top right, there is a red 'Run Cron' button. Below it, a yellow notification bar states 'Last Cron Activity: 20 seconds ago'. The interface includes a 'Filters' button, a 'Default View' dropdown, and a 'Columns' dropdown. Below these are 'Actions' and '652 records found'. The main part of the interface is a table with the following data:

ID	Job Code	Status	Created At	Scheduled At	Executed At	Finished At
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
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
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
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
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
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
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
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
1024	sales_grid_order_invoice_async	PENDING	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:53:00 AM		
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



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From:

<https://stg.amasty.net/docs/> - Amasty Extensions FAQ

Permanent link:

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