

Customer Segmentation for Magento 2

User Guide

Version 1.0

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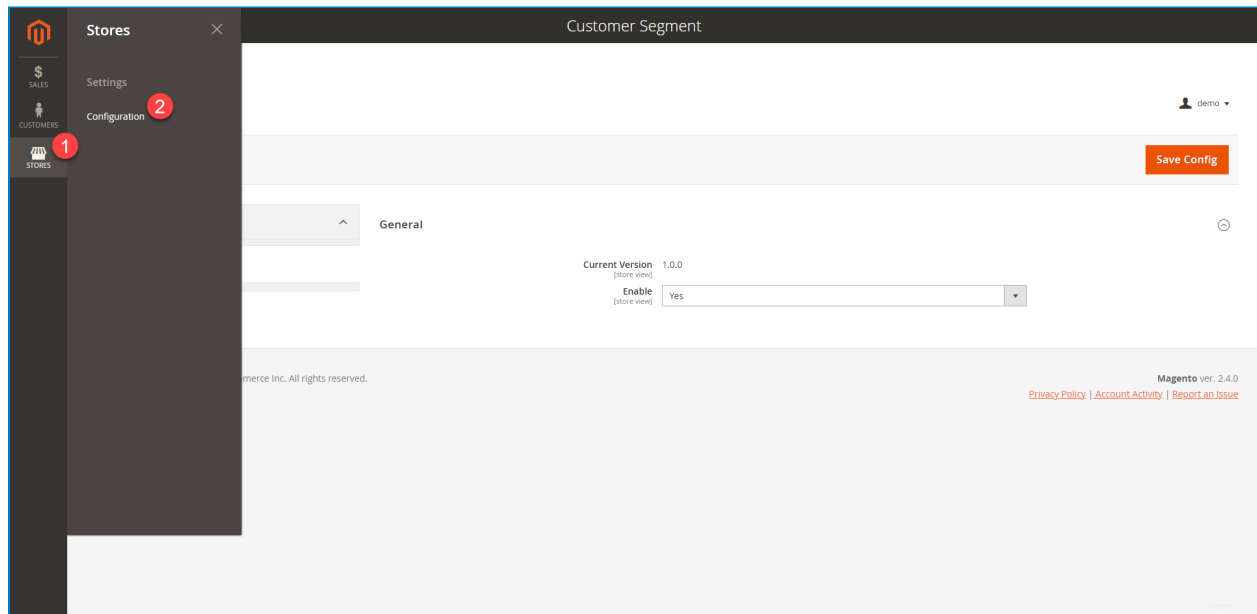
I) Introduction

Customer Segmentation for Magento 2 is a comprehensive tool for running marketing campaigns better. It allows store owners to split both registered and guest customers into different segments based on rules. Merchants can segment them by various parameters like customer information, shopping cart data, orders, and others using conditions and their combinations.

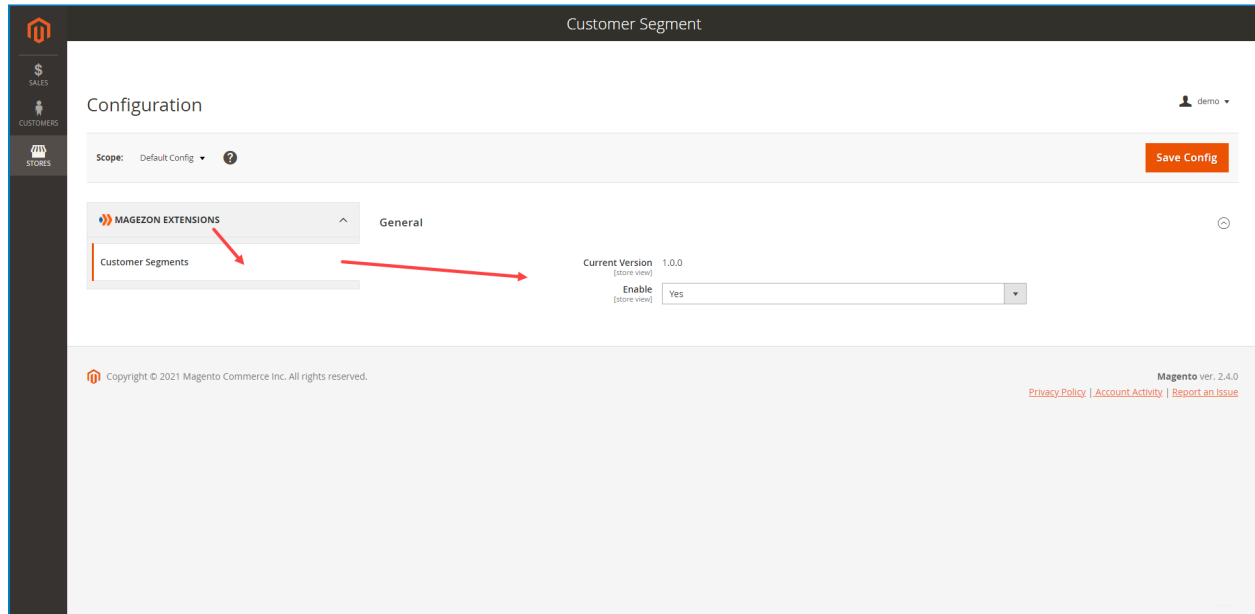
- Segment both registered and guest customers based on rules
- Enhance Cart Price Rules functionality
- Export customer segmentation list to CSV and XML files
- Keep track of customers and orders in each segment
- Cron execution time supported
- Support 4 analytics charts

II) Configuration

After installing the extension, navigate to **Stores > Settings > Configuration**:

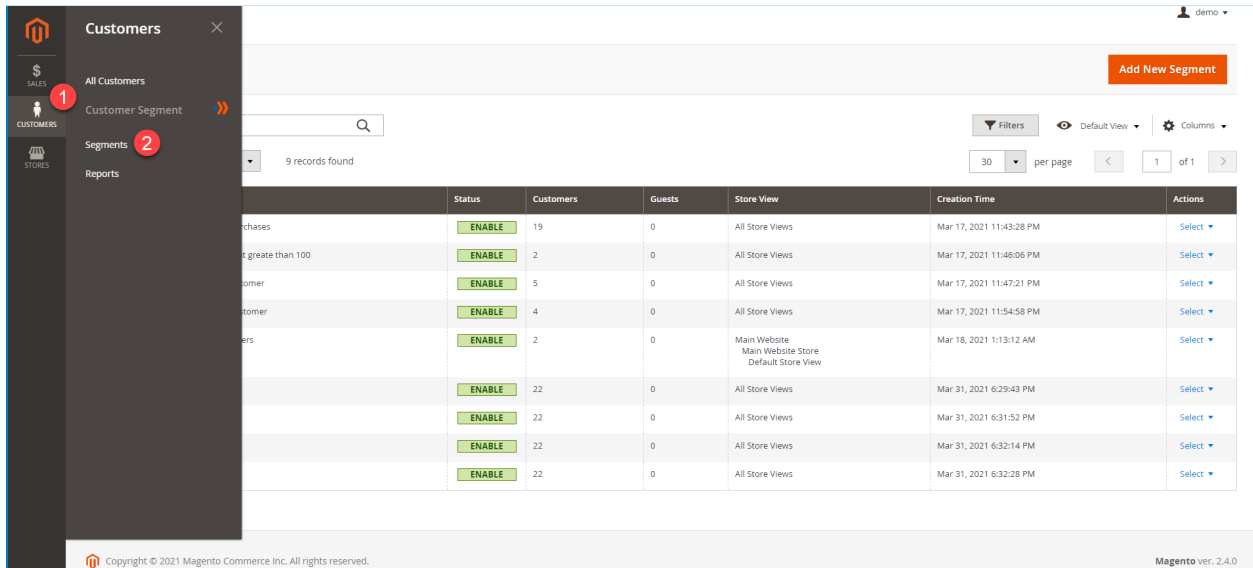


In the left admin panel, span **Magezon Extensions** and click on **Customer Segment** to enable the extension. The interface will look like below:



III) Create Segments

- From the admin panel, go to **Customers > Customer Segment > Segments:**

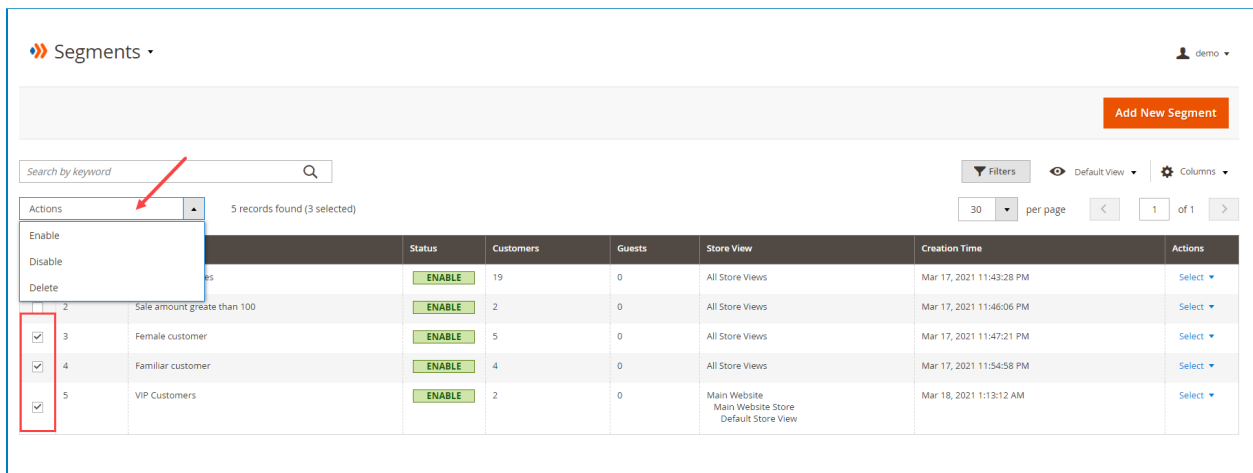


The screenshot shows the Magento Admin Panel interface. On the left, a sidebar menu is open with the 'Customers' section selected. Under 'Customers', the 'Customer Segment' option is highlighted with a red circle and the number '1'. Below it, the 'Segments' option is also highlighted with a red circle and the number '2'. The main content area displays the 'Customer Segments' grid. At the top right of the grid, there is an 'Add New Segment' button. Below the grid header, there are filters, a search bar, and pagination controls showing '9 records found' and '30 per page'. The grid itself has columns for 'Status', 'Customers', 'Guests', 'Store View', 'Creation Time', and 'Actions'. The first column of the grid is partially obscured by the sidebar menu.

Status	Customers	Guests	Store View	Creation Time	Actions
ENABLE	19	0	All Store Views	Mar 17, 2021 11:43:28 PM	Select
ENABLE	2	0	All Store Views	Mar 17, 2021 11:46:06 PM	Select
ENABLE	5	0	All Store Views	Mar 17, 2021 11:47:21 PM	Select
ENABLE	4	0	All Store Views	Mar 17, 2021 11:54:58 PM	Select
ENABLE	2	0	Main Website Main Website Store Default Store View	Mar 18, 2021 1:13:12 AM	Select
ENABLE	22	0	All Store Views	Mar 31, 2021 6:29:43 PM	Select
ENABLE	22	0	All Store Views	Mar 31, 2021 6:31:52 PM	Select
ENABLE	22	0	All Store Views	Mar 31, 2021 6:32:14 PM	Select
ENABLE	22	0	All Store Views	Mar 31, 2021 6:32:28 PM	Select

- You'll see a grid containing all created segments. The grid includes **ID** of segment, **Name** of segment, **Status** of segment, **Customers** - the number of customers in segment, **Guests** - the numbers of guests in segment, **Store Views**, **Creation Time**, and **Actions**.

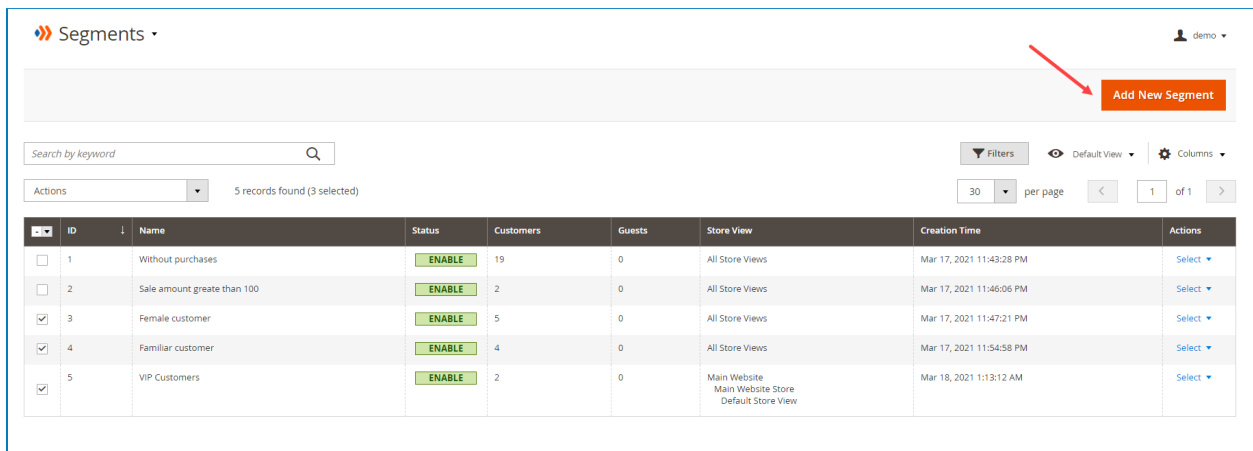
The Customer Segmentation extension offers you 3 actions in the segment grid's left corner, including **Delete**, **Enable**, and **Disable**. You can choose multiple segments at once and set an action for them.



The screenshot shows the 'Segments' interface with a table of customer segments. A red arrow points to the 'Actions' dropdown menu, which is open and shows three options: 'Enable', 'Disable', and 'Delete'. The table contains 5 records, all with a status of 'ENABLE'. The 'Add New Segment' button is visible in the top right corner.

ID	Name	Status	Customers	Guests	Store View	Creation Time	Actions
1	Without purchases	ENABLE	19	0	All Store Views	Mar 17, 2021 11:43:28 PM	Select
2	Sale amount greater than 100	ENABLE	2	0	All Store Views	Mar 17, 2021 11:46:06 PM	Select
3	Female customer	ENABLE	5	0	All Store Views	Mar 17, 2021 11:47:21 PM	Select
4	Familiar customer	ENABLE	4	0	All Store Views	Mar 17, 2021 11:54:58 PM	Select
5	VIP Customers	ENABLE	2	0	Main Website Main Website Store Default Store View	Mar 18, 2021 1:13:12 AM	Select

- Click the **“Add New Segment”** button to create a new segment:

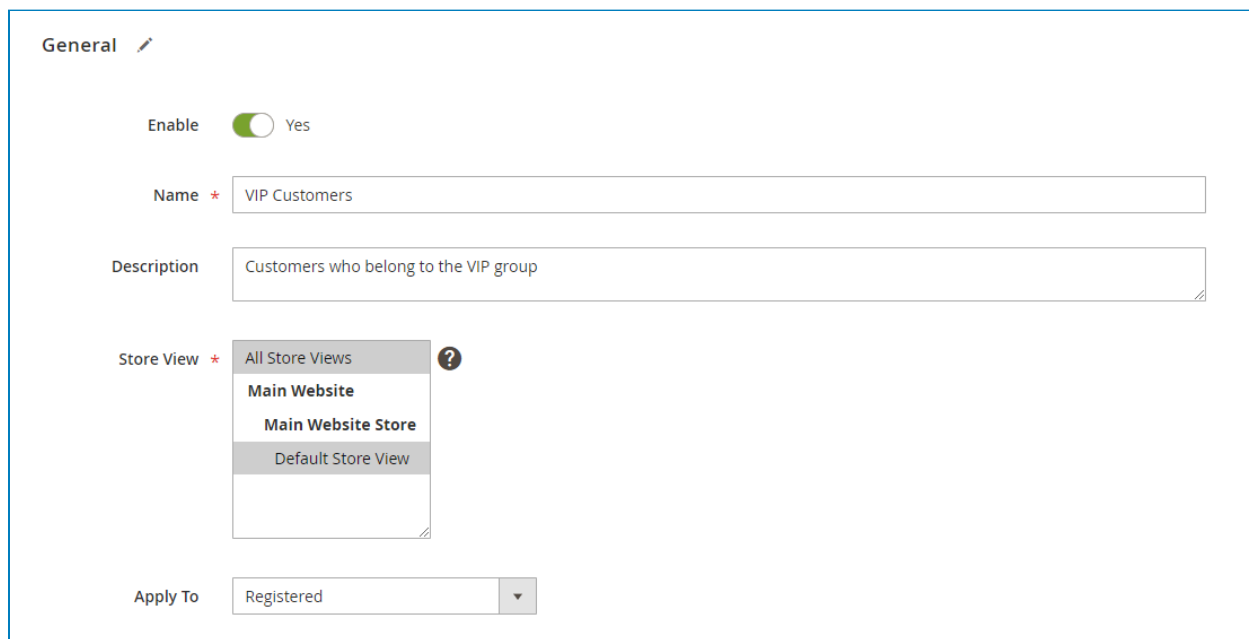


The screenshot shows the 'Segments' interface with the 'Add New Segment' button highlighted by a red arrow. The table contains 5 records, all with a status of 'ENABLE'. The 'Add New Segment' button is visible in the top right corner.

ID	Name	Status	Customers	Guests	Store View	Creation Time	Actions
1	Without purchases	ENABLE	19	0	All Store Views	Mar 17, 2021 11:43:28 PM	Select
2	Sale amount greater than 100	ENABLE	2	0	All Store Views	Mar 17, 2021 11:46:06 PM	Select
3	Female customer	ENABLE	5	0	All Store Views	Mar 17, 2021 11:47:21 PM	Select
4	Familiar customer	ENABLE	4	0	All Store Views	Mar 17, 2021 11:54:58 PM	Select
5	VIP Customers	ENABLE	2	0	Main Website Main Website Store Default Store View	Mar 18, 2021 1:13:12 AM	Select

1. General

Go to configure **Segment General Information**:

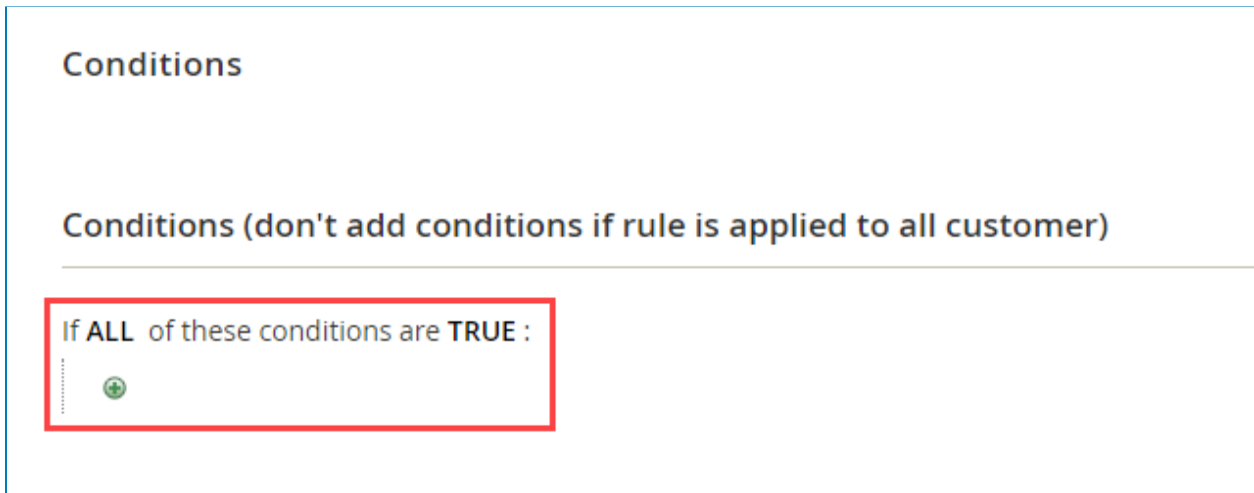


The screenshot shows the 'General' configuration tab for a customer segment. It includes a toggle switch for 'Enable' (set to 'Yes'), a text field for 'Name' (containing 'VIP Customers'), a text area for 'Description' (containing 'Customers who belong to the VIP group'), a dropdown menu for 'Store View' (showing 'All Store Views', 'Main Website', 'Main Website Store', and 'Default Store View'), and a dropdown for 'Apply To' (set to 'Registered').

- **Enable:** Turn on/off the button to enable/disable segment.
- **Name:** Enter name for the new segment.
- **Description:** Write an explanation for the new segment.
- **Store View:** Choose specific store views that apply to this segment.
- **Apply To:** The extension allows you to segment both **Registered** and **Guest Customers**. There are 3 options to apply the segment to:
 - + Registered
 - + Guest Customers
 - + Registered and Guest Customers

2. Conditions

This section is used to apply segments to customers who meet conditions based on various parameters.



You can see the statement in the **Conditions** section - “**If ALL of these conditions are TRUE.**” This statement offers 2 links - **ALL** and **TRUE** to edit:

- Click the **ALL** link to choose **ALL** or **ANY**.
- Click the **TRUE** link to choose **TRUE** or **FALSE**.
- Leave the **Conditions** section blank if you want to apply this segment to all customers.

Hit the plus icon to add a new condition:

Conditions

Conditions (don't add conditions if rule is applied to all customer)

If ALL of these conditions are TRUE :



After that, you will see a selection, click the down arrow to choose the condition based on **different parameters** and **condition combinations**.

NOTE: You can set multiple conditions as you want.

Conditions

Conditions (don't add conditions if rule is applied to all customer)

If ALL of these conditions are TRUE :

Please choose a condition to add.

Customer

Associate to Website

Create In

Created At

Created From

Date of Birth

Default Billing Address

Default Shipping Address

Disable Automatic Group Change Based on VAT ID

Email

Failures Number

Failures Number

First Failure Date

First Name

Gender

Group

Is Confirmed

Last Name

20

per page

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1

of 1

>

	Email	Gender	Group	Create At
	donec.nibh.enim@nonquam.edu		Vip	2015-10-30 12:50:00
	jondoe@example.com	Female	Vip	2015-10-30 12:49:47


Matched Guest

Conditions



Conditions (don't add conditions if rule is applied to all customer)

If ALL of these conditions are TRUE:

Customer Group is 

- General
- Retailer
- Vip**
- Wholesale

[Preview Customers](#)

Search: [Reset Filter](#) 2 records found

20 per page < 1 of 1 >

ID	Name	Email	Gender	Group	Create At
20	Bruce Gage	donec.nibh.enim@nonquam.edu		Vip	2015-10-30 12:50:00
2	Jon Doe	jondoe@example.com	Female	Vip	2015-10-30 12:49:47

After setting the conditions, click the **Preview Customers** button, and all customers who meet the conditions will be displayed in the grid below:

Conditions

Conditions (don't add conditions if rule is applied to all customer)

If ALL of these conditions are TRUE:
Customer Group is Vip

Preview Customers

Search Reset Filter

2 records found

20 per page 1 of 1

ID	Name	Email	Gender	Group	Create At
20	Bruce Gage	donec.nibh.enim@nonquam.edu		Vip	2015-10-30 12:50:00
2	Jon Doe	jondoe@example.com	Female	Vip	2015-10-30 12:49:47

NOTE: This grid shows **Registered Customers** who meet the conditions only. To preview **Registered Customers** and **Guest Customers** separately, go to the **Matched Customers** and **Matched Guest** sections to see them.

NOTE: To preview matched customers in the **Matched Customers** and **Matched Guest** section, you have to go to the top bar, click on **Save and Apply** option to apply this condition. Then go back to these sections to preview customers who meet the conditions.

VIP Customers ▾

🔍 m2magezon ▾

← Back

Save and Apply

Delete

Save ▾

General ⊙

Enable ☒ Yes

Name *

VIP Customers

Description

Customers who belong to the VIP group

Store View *

All Store Views

Main Website

Main Website Store

Default Store View

Apply To

Registered ▾

3. Matched Customers

After clicking on **Save and Apply**, you will see the grid that includes all **Matched Customers** as the following image:

NOTE: Customers mean people who registered.

Matched Customers

Filters

Columns

Export

<input type="checkbox"/>	ID	Email	Name	Creation Time
<input type="checkbox"/>	2	jondoe@example.com	Jon Doe	Oct 30, 2015 5:49:47 AM
<input type="checkbox"/>	20	donec.nibh,enim@nonquam.edu	Bruce Gage	Oct 30, 2015 5:50:00 AM

4. Matched Guest

And below is the grid that includes all **Matched Guest**:

NOTE: Guest means people who made purchases but didn't register an account.

Matched Guest

Filters

Columns

Export

	ID	Email	Name	Creation Time
We couldn't find any records.				

NOTE: Customer Segmentation for Magento 2 allows you to export the customer segmentation list to 2 files: **CSV and XML**. In the right corner of grids that include **Matched Customers** and **Matched Guest**, you can the **Export** option. Click on it then download the list.

After finishing the configuration, on the top bar, click:

- **Save** button to save the segment information.
- **Save & New** button in the **Save** drop-down to save the segment information and create a new segment.
- **Save & Close** button in the **Save** drop-down to save the segment information and go back to the segment grid page.
- Click the **Back** button to go back to the segment grid page.
- Click the **Delete** button to delete the segment.

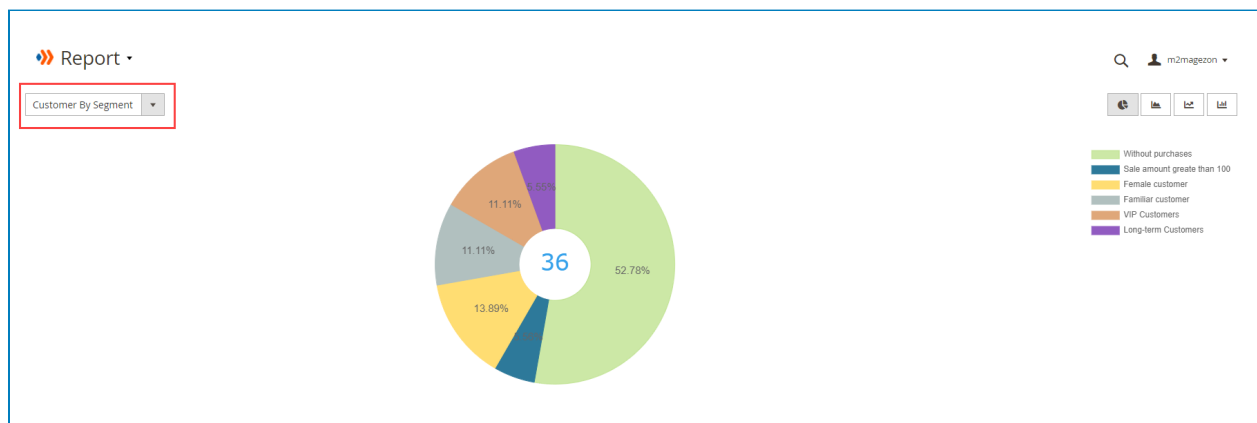
IV) Reports

The Customer Segmentation extension allows the admin to manage customers and orders by segment through reports.

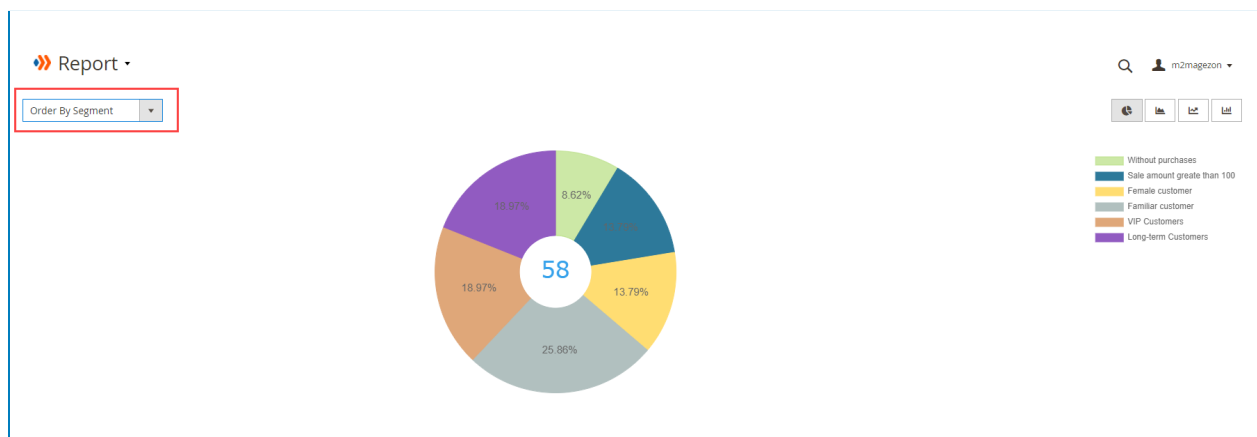
From the admin panel, navigate to **Customer > Customer Segment > Reports**.

There are 2 types of report:

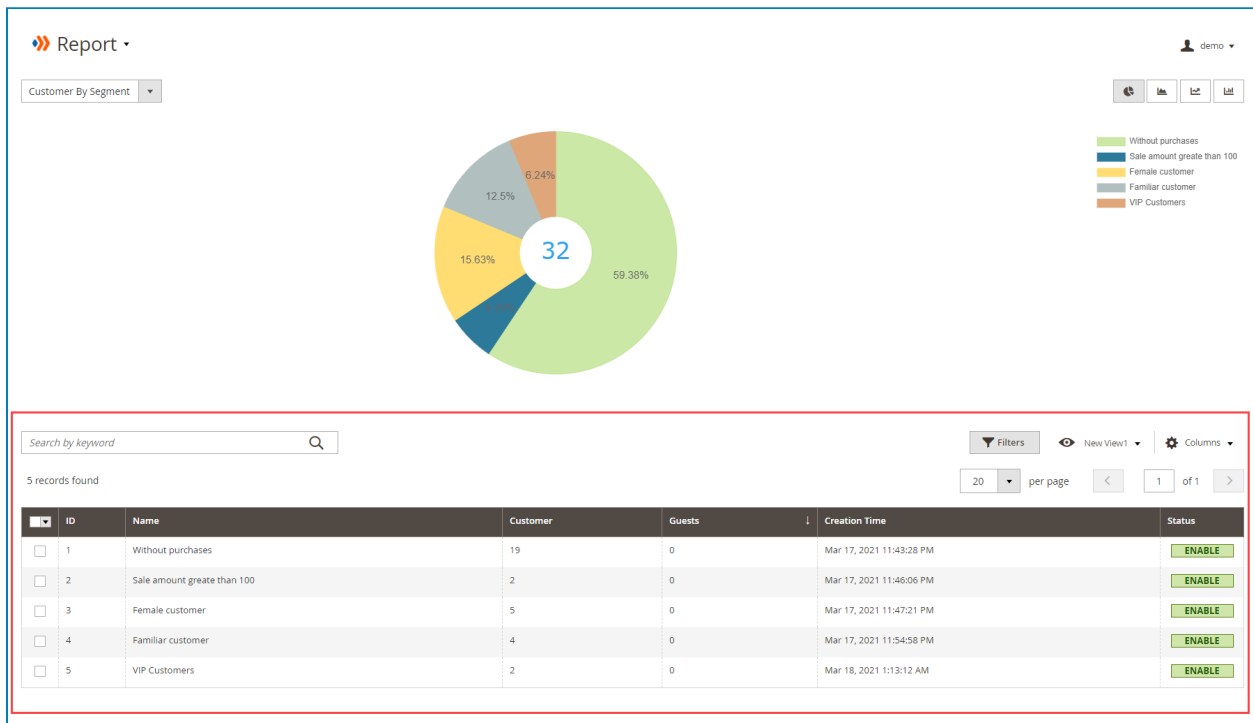
- + **Customer By Segment:** With this type, you can view the number of customers in each segment through the chart.



- + **Order By Segment:** For this type, you can view the number of orders in each segment through the chart.

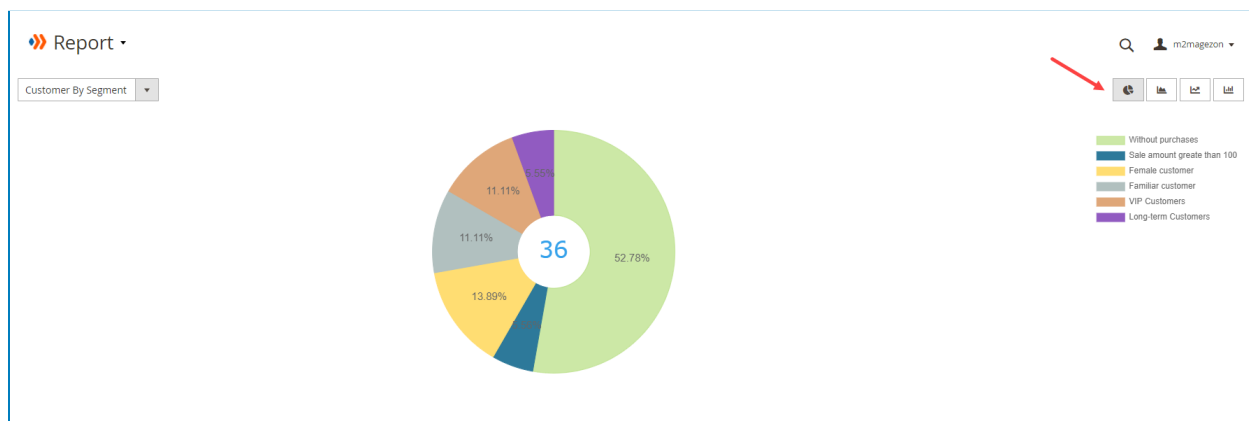


Below the chart is the grid that includes all created segments, their **ID**, their **Name**, the **number of customers & orders** in each segment, **segment's Status**, and **Creation Time**.

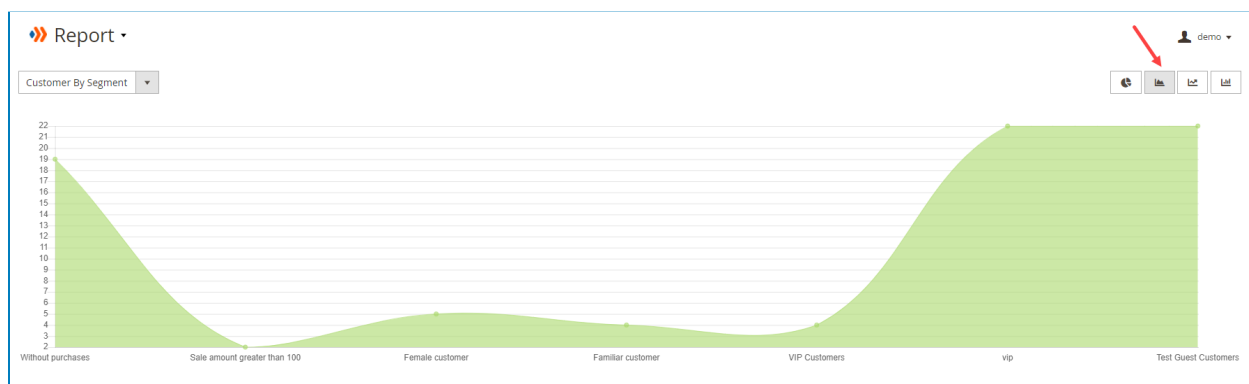


The Customer Segmentation extension provides **4 chart types**:

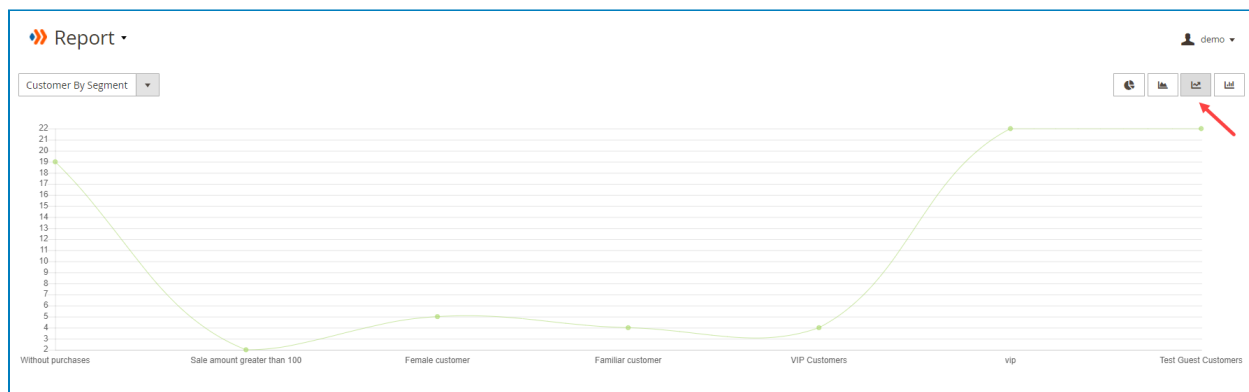
Type 1:



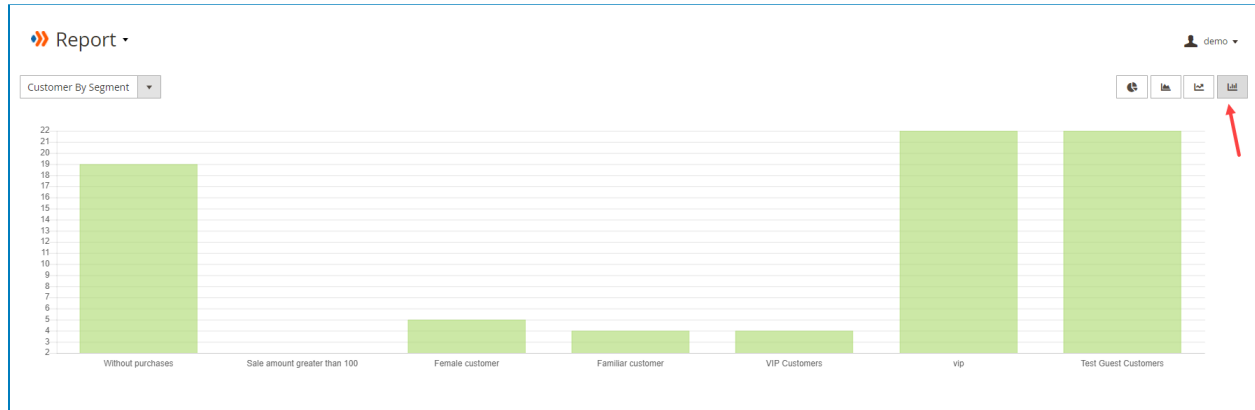
Type 2:



Type 3:



Type 4:

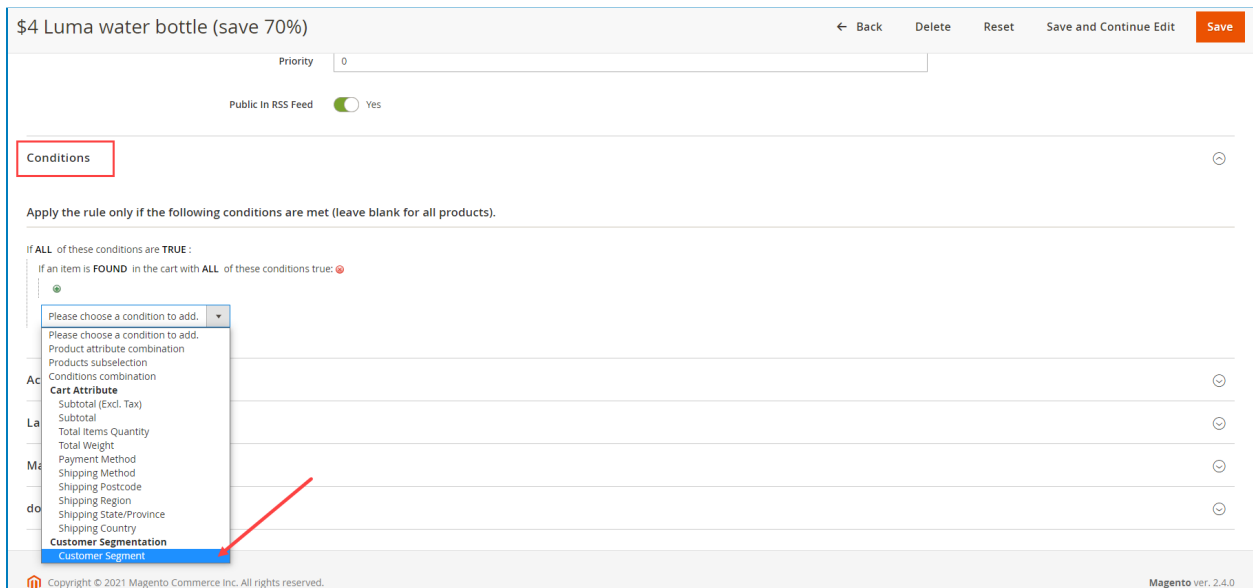


IV) Integration With Cart Price Rules

The extension allows you to use all created segments to apply them when creating **Cart Price Rules**.

From the Dashboard, go to **Marketing >> Promotions >> Cart Price Rules**

Move to the **Conditions** section, then choose the condition called **Customer Segment**.



Next, you can select appropriate segments that created by **Customer Segmentation** extension as the following image to apply to the **Rule**:

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: ❌



Without purchases
Sale amount greater than 100
Female customer
Familiar customer
VIP Customers



Customer Segment equal



VII) Support

If you have any questions or need any support, feel free to contact us by following ways.

We will get back to you within 24 hours since you submit your support request.

- Submit [contact form](#).
- Email us at support@magezon.com.
- Submit a [ticket](#).
- Contact us through [Skype](#): support@magezon.com.
- Contact us via live chat on our website: magezon.com.