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# Market Segmentation Suite

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Having hard time finding an answer to your question?

Check out our Knowledge Base.

Extension page: http://ecommerce.aheadworks.com/magento-extensions/market-segmentation-suite.html

Market Segmentation Suite extension takes the concept of customer segmentation to a whole new level. Whether you choose to target your customers on a one-to-one (personalized) or one-to-many (customer group) basis, you control with precision who sees what and when based on what you know about them. Use your understanding of a visitor's propensity to buy to maximize the probability of a purchase.

### Installation

1. Backup your web directory and store database.

Click to view details

You can make backup copies with any tool you find appropriate

If you are going to use the native Magento backup function, navigate to **System -> Tools -> Backups** and perform **System** and **Database** backups



2. Log in to the Magento backend

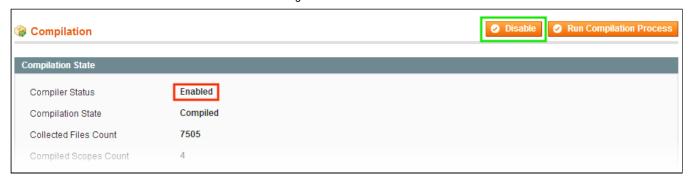
3. Disable compilation

Click to view details

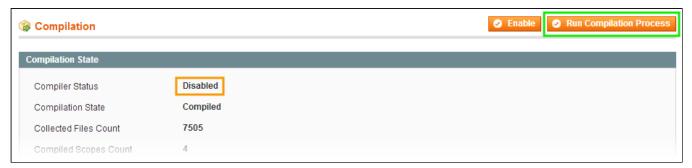
Navigate to **System -> Tools -> Compilation**.

If Compiler status is Disabled, you can skip to the next step

If Compiler is enabled, disable it.



**IMPORTANT:** after the extension is installed, you can enable the compilation again; **IT IS CRUCIAL** that you use "**Run Compilation Process**" function, not just "Enable button"



Installing an extension with the Compilation enabled will result in store downtime.

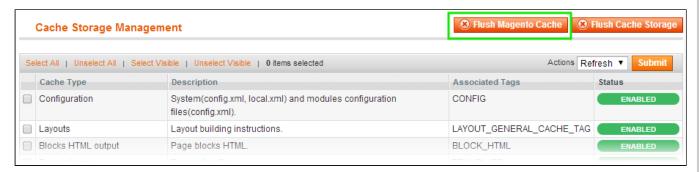
4. Flush store cache

Click to view details

You can flush the store cache in 2 ways:

via the backend:

Navigate to System -> Cache Management menu, and click Flush Magento Cache button



via filesystem:

On your server, navigate to Magento root folder, then proceed to /var/cache/; delete all the content there.

- 5. Download the extension package from your account and extract the downloaded archive
- 6. Copy the content of /Step\_1/ folder to your store's root directory
- 7. Copy the content of /Step\_2/ folder to your store's root directory
- 8. Flush store cache again; log out from the backend and log in again.

### Set up cron

The Market Segmentation Suite extension uses cron for index updates. Read the following instructions on setting cron job for your Magento store: Magento user guide. If you have already configured cron jobs for your Magento installation then you can skip this step.

Generally it would be enough to run in SSH console of your server:

crontab -e

And add the following line:

```
*/3 * * * * wget 'http://your-store/cron.php'
```

Don't forget to confirm saving request when exit.

The recommended Cron execution frequency is 3-5 minutes.

# Configuration

### Creating rules

#### Note:

The extension only works for the registered customers, as all the necessary references in the data base are stored for registered customers only.

To create new rules and manage the existent ones, navigate to the MSS > Manage Rules backend page.

At the Rule Information tab you can define a name for the rule and specify its status.



At the **Conditions** tab you can specify the actual rule conditions.



Click to view details on available conditions

The following conditions are available for the rule:

### **Orders Conditions:**

- · Number of orders
- · Sales amount (total/average)
- Purchased quantity (total/average)

Each of the *Orders Conditions* has the following sub-conditions:

- Order status
- · Order date

### Customer\*:

- · Customer address
  - City
  - State
  - Country
  - ZIP
  - Telephone
  - Company
- Customer group
- · Date of birth
- Billing address
- Shipping address
- Email
- First name
- Last name
- Newsletter subscription
- Advanced newsletter subscription
  - \* Note, the extension works with registered customers only

Extra customer conditions become available if the Customer Attributes extension is installed. See details on the integration here.

### Shopping cart\*

· Grand total

- Number of items
  - \* Note, the Shopping Cart conditions work with registered customers only

### **Products**

- Product list (wishlist/shopping cart)
  - Name
  - SKU
  - Price
  - etc. (other product attributes)
- Product history (how many times the product was viewed/ordered\*)
  - Name
  - SKU
  - Price
  - etc. (other product attributes)

\*NOTE: For "Product was ordered X times" rules, a sub-condition 'Order status' is available.

### **Rules Indexing**

To improve the performance, the Market Segmentation Suite extension has its internal indexing functionality. There are separate Orders and Customers indexes.

• **Initial Indexing**: After a rule is saved and re-indexed, the extension will process all the applicable objects (orders and customers) with the rule. The resulting objects collection will be saved in the index for quick access / application.

NOTE: Initial rule indexing may take up some time, depending on the amount of orders/ customers at the store

• **Index updates**: When a new object appears, the extension will process it with all the active MSS rules, and add this object to the correspondent index as matching if the conditions are met.

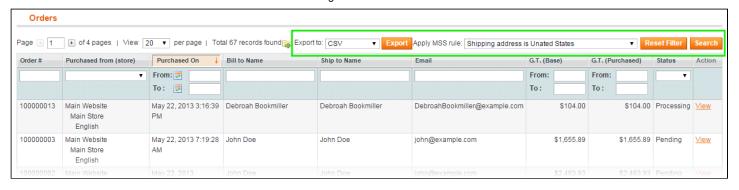
### **Applying Filters**

The extension filters can be applied through 2 dedicated backend grids (Order and Customers).

### **Orders Grid**

To filter orders with MSS rules:

- 1. Navigate to MSS -> Orders backend page.
- 2. Pick the required rule in the **Apply MSS rule** selector, and click **Search** button.
- 3. To export the results, select the preferred output format (CSV or XML) in the Export To field, and click Export button.



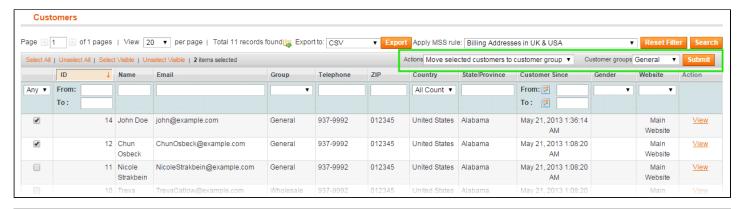
### **Customers Grid**

To filter customers with MSS rules:

- 1. Navigate to MSS -> Customers backend page.
- 2. Pick the required rule in the Apply MSS rule selector, and click Search button.
- 3. To export the results, select the preferred output format (CSV or XML) in the **Export To** field, and click **Export** button.

To move customers to a different customer group:

- 1. If required, create a target group in Customers -> Customer Groups.
- 2. In MSS -> Customers backend grid, apply the MSS rule as described above.
- 3. Select the necessary customer accounts from the results list.
- Select "Move selected customers to customer group" in the Actions selector, select the target Customer Group and click Submit.



# Integration with other aheadWorks extensions

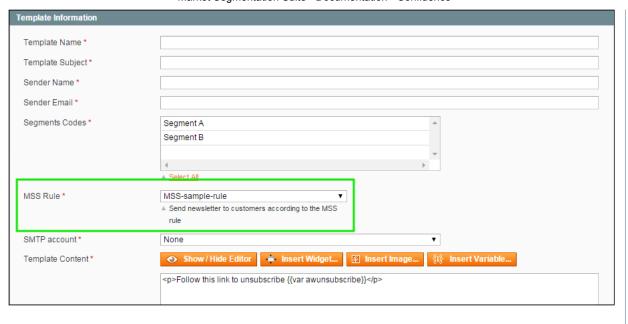
The **Market Segmentation Suite** module features integration with a number of other aheadWorks extensions. Using the integrated products together with the **MSS** adds new options to the former.

Below is the full list of the other aheadWorks products integrated with the **MSS** extension:

Advanced Newsletter (since version 2.3.2)

### How does the integration work?

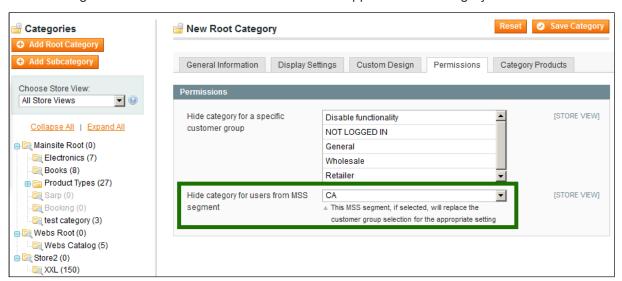
The Advanced Newsletter Integration allows validate the NL recipients via MSS rule. The rules are applied in **Advanced Newsletter -> Templates -> Create / Edit Template** screen.



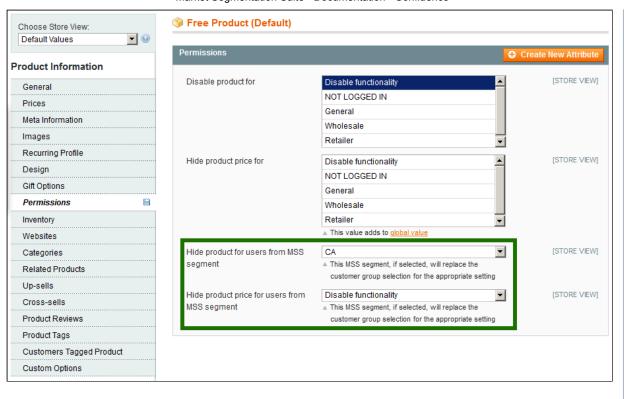
Catalog Permissions (since v. 1.4.0)

How does the integration work?

With Catalog Permissions extension MSS rules can be applied on the category level:



Or product level:



Checkout Promo (since v. 1.2.3)

How does the integration work?

The MSS extension can be used to target the Checkout Promo banners displaying.



Customer Attributes

How does the integration work?

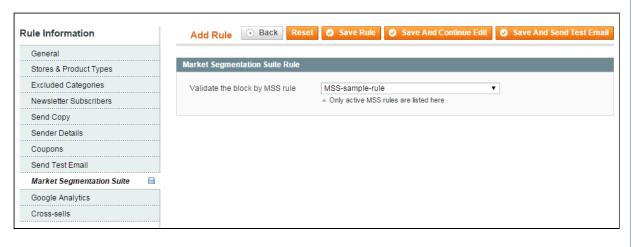
If the Customer Attributes extension is installed, new conditions (i.e., the custom account attributes created with the extension) become available for the MSS extension.



• Follow Up Email (since v. 3.5.7)

### How does the integration work?

MSS filtering can be applied to Follow Up Email rules. The Follow Up Emails will only get sent if the Customer or Order matches the MSS rule conditions.



Order Tags (since v. 1.3.0)

### How does the integration work?

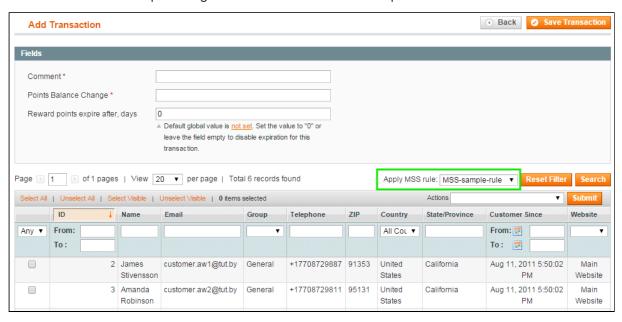
The Order Tags extension can automatically assign labels to an order if the latter meets MSS rule conditions.



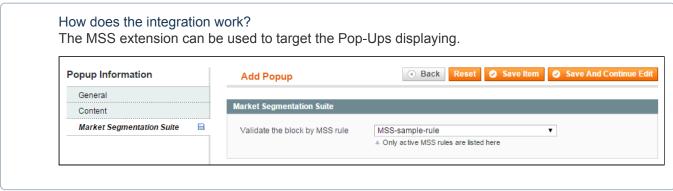
· Points And Rewards (since v. 1.6.3)

### How does the integration work?

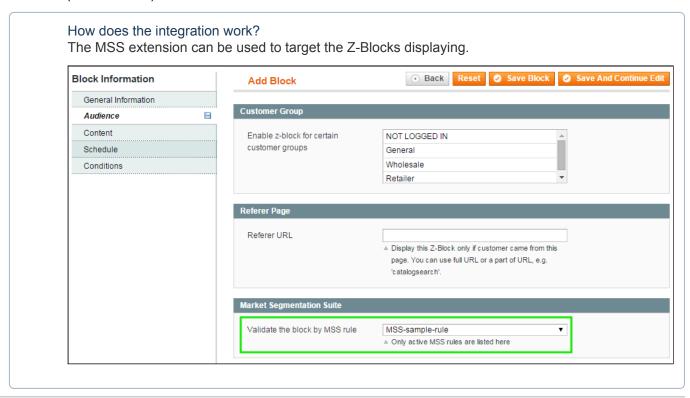
The MSS extension helps to target Points And Rewards' mass points transactions.



Pop-Up+ (since v. 1.2.1)



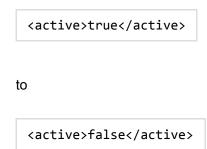
• Z-Blocks (since v. 2.3.5)



## Uninstallation

If you just need to temporary disable the extension, you can just do the steps 1-5, without deleting the files of the extension.

- · Disable compilation, in case it is enabled.
- · Login to your FTP, navigate to app/etc/modules/
- Open the file AW Marketsuite.xml and change the following line:



Now your Magento is unaware of the existence of this module.

Clear the cache under var/cache

- · Make sure that the site is working properly, otherwise roll back the changes and apply to our technical support.
- If everything works fine, it is safe to delete the files of the extension.
- In case you need to clean the database, backup your database and then run the following queries in MySQL:

```
DROP TABLE IF EXISTS `aw_marketsuite_index_customer`;
DROP TABLE IF EXISTS `aw_marketsuite_index_order`;
DROP TABLE IF EXISTS `aw_marketsuite_filters`;
```

```
delete from core_resource where code ='marketsuite_setup';
```

Note, if you are using the table with prefixes, you must specify them in all table names.

If you are not sure how to do that or expect any troubles with it, please contact your server administrator regarding the matter.

If you remove the tables as it is described above, you will need to create all rules again after the extension is re-installed.

## **Troubleshooting**

After the extension installation the store gives an error, or blank page, or suggests to start Magento installation procedure.

Change the owner of the extracted extension files to the web server user and set 775 permissions on them. Clear the store cache and try again.

There is no aheadWorks extensions under my configuration section, or having the extension tab clicked I get a blank page, or Access Denied error.

Clear the store cache, browser cookies, logout and login again.

I've set up everything correctly, inserted the HTML code but there is nothing on that page.

Clear the store cache, clear your browser cache and domain cookies and refresh the page.

My configuration changes do not appear on the store.

Clear the store cache, clear your browser cache and domain cookies and refresh the page.

You can always find the latest version of the software, full documentation, demos, screenshots and reviews at <a href="http://ecommerce.aheadworks.com">http://ecommerce.aheadworks.com</a>

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