

Market Segmentation Suite

Created by Unknown User (bondarev), last modified by Anton Lashuk on янв 05, 2019

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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.

Compilation Disable Run Compilation Process

Compilation State

Compiler Status	Enabled
Compilation State	Compiled
Collected Files Count	7505
Compiled Scopes Count	4

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"

Compilation Enable Run Compilation Process

Compilation State

Compiler Status	Disabled
Compilation State	Compiled
Collected Files Count	7505
Compiled Scopes Count	4

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

Cache Storage Management Flush Magento Cache Flush Cache Storage

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

Cache Type	Description	Associated Tags	Status
<input type="checkbox"/> Configuration	System(config.xml, local.xml) and modules configuration files(config.xml).	CONFIG	ENABLED
<input type="checkbox"/> Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	ENABLED
<input type="checkbox"/> Blocks HTML output	Page blocks HTML.	BLOCK_HTML	ENABLED

- **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.

The screenshot shows the 'Market Segmentation Suite' backend interface. On the left, there is a sidebar with 'Rule Information' and 'Conditions' tabs. The main content area is titled 'Edit Rule 'Billing Addresses in UK & USA'' and features a navigation bar with buttons: 'Back', 'Reset', 'Delete Rule', 'Save Rule', 'Save And Continue Edit', 'Save As', and 'Save And Reindex'. Below this, the 'General Information' section contains two fields: 'Rule Name *' with the value 'Billing Addresses in UK & USA' and 'Status' with a dropdown menu set to 'Active'.

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

Market Segmentation Suite

Rule Information

Conditions

Edit Rule 'Billing Addresses in UK & USA'

Back
Reset
Delete Rule
Save Rule
Save And Continue Edit
Save As
Save And Reindex

Conditions

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

- Customer **Billing** address **matches ANY** ✖
 - Country **is United Kingdom** ✖
 - Country **is United States** ✖
 - +
- Customer **Shipping** address **matches ANY** ✖
 - Country **is United Kingdom** ✖
 - Country **is United States** ✖
 - +
- +

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.

Orders

Page 1 of 4 pages | View 20 per page | Total 67 records found | Export to: CSV | Export | Apply MSS rule: Shipping address is Unated States | Reset Filter | Search

Order #	Purchased from (store)	Purchased On	Bill to Name	Ship to Name	Email	G.T. (Base)	G.T. (Purchased)	Status	Action
10000013	Main Website Main Store English	May 22, 2013 3:16:39 PM	Debroah Bookmiller	Debroah Bookmiller	DebroahBookmiller@example.com	\$104.00	\$104.00	Processing	View
10000003	Main Website Main Store English	May 22, 2013 7:19:28 AM	John Doe	John Doe	john@example.com	\$1,655.89	\$1,655.89	Pending	View
10000003	Main Website	May 22, 2013	John Doe	John Doe	john@example.com	\$2,483.93	\$2,483.93	Pending	View

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.
4. Select "*Move selected customers to customer group*" in the **Actions** selector, select the target **Customer Group** and click **Submit**.

Customers

Page 1 of 1 pages | View 20 per page | Total 11 records found | Export to: CSV | Export | Apply MSS rule: Billing Addresses in UK & USA | Reset Filter | Search

Select All | Unselect All | Select Visible | Unselect Visible | 2 items selected

Actions: Move selected customers to customer group | Customer groups: General | Submit

ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Gender	Website	Action
<input checked="" type="checkbox"/>	14 John Doe	john@example.com	General	937-9992	012345	United States	Alabama	May 21, 2013 1:36:14 AM		Main Website	View
<input checked="" type="checkbox"/>	12 Chun Osbeck	ChunOsbeck@example.com	General	937-9992	012345	United States	Alabama	May 21, 2013 1:08:20 AM		Main Website	View
<input type="checkbox"/>	11 Nicole Strakbein	NicoleStrakbein@example.com	General	937-9992	012345	United States	Alabama	May 21, 2013 1:08:20 AM		Main Website	View
<input type="checkbox"/>	10 Treva	TrevaCatlow@example.com	Wholesale	937-9992	012345	United States	Alabama	May 21, 2013 1:08:20 AM		Main	View

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.

Template Information

Template Name *

Template Subject *

Sender Name *

Sender Email *

Segments Codes *

[Select All](#)

MSS Rule *
▲ Send newsletter to customers according to the MSS rule

SMTP account *

Template Content * [Show / Hide Editor](#) [Insert Widget...](#) [Insert Image...](#) [Insert Variable...](#)

`<p>Follow this link to unsubscribe {{var awunsubscribe}}</p>`

- 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:

Categories

[Add Root Category](#)
[Add Subcategory](#)

Choose Store View:

[Collapse All](#) | [Expand All](#)

- Mainsite Root (0)
- Electronics (7)
- Books (8)
- Product Types (27)
 - Sarp (0)
 - Booking (0)
 - test category (3)
- Webs Root (0)
 - Webs Catalog (5)
- Store2 (0)
- XXL (150)

New Root Category [Reset](#) [Save Category](#)

General Information | Display Settings | Custom Design | **Permissions** | Category Products

Permissions

Hide category for a specific customer group	<input type="text" value="Disable functionality"/> <input type="text" value="NOT LOGGED IN"/> <input type="text" value="General"/> <input type="text" value="Wholesale"/> <input type="text" value="Retailer"/>	[STORE VIEW]
Hide category for users from MSS segment	<input type="text" value="CA"/> <small>▲ This MSS segment, if selected, will replace the customer group selection for the appropriate setting</small>	[STORE VIEW]

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.

Rule Information

- General
- Stores & Product Types
- Excluded Categories
- Newsletter Subscribers
- Send Copy
- Sender Details
- Coupons
- Send Test Email
- Market Segmentation Suite**
- Google Analytics
- Cross-sells

Add Rule [Back] [Reset] [Save Rule] [Save And Continue Edit] [Save And Send Test Email]

Market Segmentation Suite Rule

Validate the block by MSS rule: MSS-sample-rule
▲ Only active MSS rules are listed here

- 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.

Manage Tags

- Tag Information
- Conditions**

Add Tag [Back] [Reset] [Save Item]

Conditions

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

Market Segmentation Suite integration

MSS Rule: MSS-sample-rule

- 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.

Add Transaction [Back] [Save Transaction]

Fields

Comment *

Points Balance Change *

Reward points expire after, days
▲ Default global value is **not set**. Set the value to "0" or leave the field empty to disable expiration for this transaction.

Page 1 of 1 pages | View 20 per page | Total 6 records found

Apply MSS rule: MSS-sample-rule [Reset Filter] [Search]

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

ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website
Any	From: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All Cot	<input type="text"/>	From: <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	2 James Stivensson	customer.aw1@tut.by	General	+17708729887	91353	United States	California	Aug 11, 2011 5:50:02 PM	Main Website
<input type="checkbox"/>	3 Amanda Robinson	customer.aw2@tut.by	General	+17708729811	95131	United States	California	Aug 11, 2011 5:50:02 PM	Main Website

- Pop-Up+ (since v. 1.2.1)

How does the integration work?

The MSS extension can be used to target the Pop-Ups displaying.

- Z-Blocks (since v. 2.3.5)

How does the integration work?

The MSS extension can be used to target the Z-Blocks displaying.

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:

```
<active>true</active>
```

to

```
<active>>false</active>
```

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

<http://ecommerce.aheadworks.com>

License agreement: <http://ecommerce.aheadworks.com/LICENSE-M1.txt>

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это

Станьте первыми кому понравится

Ни одной