

# Magento Extension: Syncing and Segmenting Customers

Magento has announced that they'd stop supporting the Magento 1.x platform, and has finally sunset the version 1 on June 2020. More info [here](#).

 Following this announcement, we have stopped supporting our integration with Magento 1 as well.

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## Overview

The *Sync/Segment Customers* feature, accessible under *Newsletter > MailUp*, allow you to:

- Manually transfer customer data to MailUp (as opposed to doing so [automatically](#))
- Segment customers using a number of variables (e.g. what they purchased in a specific time period) and pushing that "segment" to MailUp as a "Group"

Why this feature?

- Transferring customer information manually to MailUp can help in a variety of scenarios, such as when you are initially setting up the MailUp Extension and wish to push Customers to MailUp
- Planning targeted campaigns that leverage data that is not available in MailUp

Please note that, due to technical limitations, this feature will only retrieve customers who have **registered** for an account on your shop. It will not retrieve data for purchases performed as guests.

## Manually transferring customer information to MailUp

The MailUp Extension for Magento [automatically transfers select customer and order data](#) to the MailUp system on a schedule. This is configured in the [Settings](#) page.

There are scenarios, however, when you may need to manually transfer customer data to MailUp. For example, here is a couple of typical scenarios.

### Performing an initial data transfer

- You just installed the MailUp Extension and want to transfer customers that opt to receive emails from you to MailUp
- You can do so in just a few clicks using this feature

### Asking customers that did not opt-in to sign up for your newsletter

- You have been running your store for a while
- You have not, however, pitched customers on signing up for your newsletter during registration
- You wish to ask them to do so
- In this scenario, you will want to use the *Send opt-in confirmation message to new subscribers* (see below)

## Segmenting customers in Magento

The MailUp extension for Magento makes it easy to...

- segment customers based on their order history
- assign them to a specific *Group* in MailUp

This allows you to execute targeted email marketing campaigns to that *Group*.

Note: you can segment customers in MailUp extensively using [filters](#), but MailUp does not store a customer's order history, thus the existence of this feature directly in the Magento admin.

Here is a video tutorial that introduces this feature and talks about a typical scenario for one-time email marketing campaigns often run on an ecommerce store.

Log into your Magento admin area and select *Newsletter > MailUp > Sync/Segment Customers*

**MailUp** Apply filter

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### Filter customers

[Get hints =>](#)

By this plugin you can import contacts registered in your eCommerce in the MailUp platform.

**Sold products**  
 All customers  Customers who have purchased  Customers who haven't purchased yet

Subscribed to Newsletter

**Groups**  
Select customer group:

**Country**  
Select country:   
Zip code:

**Prodotti e categorie**  
Insert product SKU:   
Select category:

**Data di iscrizione**  
From:  (dd/mm/yyyy)  
To:  (dd/mm/yyyy)

**Total purchased amount**  
Order total:  Specify amount:

**Date of purchase**  
Show customers who:   
In this period:  
From:  (dd/mm/yyyy)  
To:  (dd/mm/yyyy)

## Available filters

You can segment customers using a variety of filters. Let's take a look.

- **Store:** segment based on which store the customer was created in.
- **Purchase history:** quickly segment based on whether customers purchased or not. The definition of what a purchase is depends on the order statuses that you selected in the [settings](#).
- **Opt-in status:** filter customers that have vs. have not opted to receive emails from the store
- **Groups:** select a Magento group

- **Location:** filter based on country and/or zip code
- **Products and categories:** filter based on purchase of a specific product (SKU) or product category
- **Total purchased amount:** segment customers that have purchased more, less, or exactly a certain amount
- **Purchase time frame:** restrict results to customers that have purchased or not purchased during a specific time period.

Where was the customer created?



Note that where a customer account was originally created matters when you are using the **store filter**. That filter only matches customers *created* in the store you select. It's not whether they have purchased in that store or not.

## What happens in Magento

1. Select the filters that you wish to use
2. When you are done, click on "Apply Filter" in the top-right corner of the page
3. The following page will show you a sample of the customers that match the filter. The system does not show all customers as that could create a performance issue.
4. Next, select an existing group (these are the Groups that exist in your MailUp account within the List that has been connected to the Magento store), or create a new one.
5. Specify whether you want to **send a Opt-in Confirmation Message to new subscribers** (see above for detailed information on this setting).
6. Send the information to MailUp

## What happens in MailUp

- If you entered a new group name, that new Group will be created in MailUp
- The customers that you filtered in Magento will be assigned to the selected Group: if they are already assigned to the Group, nothing happens.
- Customers are added as "Subscribed" to the List or as "Pending" based on the *Send opt-in confirmation message to new subscribers* setting (see below).
- If a customer is transferred to a List from which he or she had previously unsubscribed, their subscription preferences are NOT changed. So that customer will remain unsubscribed in that list.

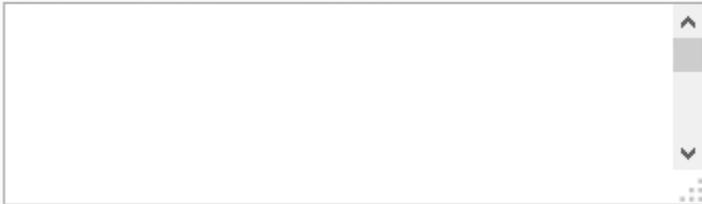
## Send opt-in confirmation message to new subscribers

On the second step of the *Sync/segment Customers* feature you will see an option to Send opt-in email to new subscribers.

## Confirm filtered customers and select MailUp group

Were found **40** records

Filtered customers preview (max 25):



Selected list: **Main List**

### Next step

Select group

Select an existing group:

AUTOMATICALLY UPDATED ADDRESSES

or

Create new customer group

Group name:

September 2014

### Next step

Send opt-in email to new subscribers

Message ID (optional)

158

[See the documentation for details](#)

When this checkbox is **checked**, this is what happens:

- If a recipient is not a subscriber in MailUp, the subscriber is added to MailUp as "Pending"
- A message to those customers is added to the send queue, ready to be sent. With regard to the message that will be used for the mailing:
  - If the *Message ID* (see screenshot above) is empty, MailUp will use the default "[Request for subscription confirmation](#)" message
  - Otherwise enter a valid *Message ID* in the corresponding field: make sure that the message ID refers to a message that you have set up as a request for subscription confirmation (it should contain the subscription confirmation link)
- Please note: you will need to log into your MailUp console and start the sending process for those messages: they are added to the queue, but they are not sent until you start the mailing process.
- If a recipient is already a subscriber in MailUp, nothing happens: that subscriber's status will not be changed.
- If a recipient had unsubscribed in MailUp, nothing happens: that subscriber's status will not be changed.

This setting is therefore recommended in this scenario:

- You are transferring to MailUp customers that **did not opt-in to receive commercial messages from the store** (e.g. specials, promotions, new arrivals, etc.).
- You want to send them an email (the *request for subscription confirmation* email) through which they can indicate whether they would like to receive such messages or not

Here are some use cases that will help you understand how these features are used.

### Existing Magento merchant that starts using MailUp

- You have been using Magento for a while.
  - Before using MailUp, you didn't collect opt-in preferences in some scenarios. For example: there was a newsletter signup form in the footer of the store, but did not have a newsletter signup checkbox during checkout.
  - Many customers, therefore, never opted in to receive emails because they didn't even know that they could.
  - You wish to invite those non opt-in customers to subscribe to a new email marketing program that you are about to launch.
  - For example, you plan on sending them a message such as... "We are starting an awesome new email program: sign up to receive weekly store updates and promotions!"
  - Although legally (e.g. CASL) you could send commercial messages to those that are considered active customers (i.e. have purchased within the last 2 years), you prefer to follow email marketing best practices and have them opt in.
  - You can easily filter in Magento anyone that is not considered opted-in in the Magento database by selecting the corresponding filter in the *Sync/Segment Customers* feature of the MailUp Extension.
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- In the second step of the *Sync/Segment Customers* feature you will select "Send opt-in email to new subscribers". Those that are not already subscribers in the MailUp List connected to the store, will be added to the List as *Pending* subscribers (i.e. pending opt-in confirmation).
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- Beginning with version 2.7 of the Extension, you can now choose which email message will be sent to those *Pending* subscribers by entering the **message ID** in the corresponding input field ★. In the screenshot above, they will be sent message ID 158.
  - If no message ID is entered, the default subscription confirmation request message is used.
  - This feature is important because the subscription confirmation request message that is sent to pending subscribers in a scenario like this one is very likely different from the regular one that is sent when somebody signs up.
  - When the sync job is executed, those customers will be added to MailUp as *Pending* and a mailing to them using the selected message will be added to the *Send Queue*, ready to be sent.

### Merchant wants to "pitch again"

- You have been using Magento for a while.
- Before using MailUp, you collected opt-in preferences and sent emails for a while, but then at some point you stopped.
- You are now launching a completely new email program and want to pitch current customers on it (i.e. customers that have placed an order in the last 2 years).
- You can easily filter customers in Magento separating those that had opted-in and those that did not, and sending them two separate messages.
  - The first ones (opt-in), will receive a message that talks about the new email program: no subscription confirmation is needed since they had already opted in, but they are given the ability to unsubscribe.
  - The second ones (non opt-in), will be added to MailUp as pending, and will receive a separate pitch, which will include an invitation to subscribe

★ In MailUp, the message ID is shown on the page that lists saved messages (Messages > Email > Saved).

## Sending a Message

[Log into your MailUp admin console](#) to create and send the message to the customers that were imported from your Magento store.

You can include the customer name in the message (e.g. "Dear Paul" instead of "Dear Customer") by using MailUp's Dynamic Tags feature (the [Message+](#) feature package is required).

For this to work with the data coming from the Magento store, however, make sure that the following is true:

- First and Last Name exist in the Magento customer database (otherwise the default value for the dynamic tag will be used)
- The First Name field is the first field in your list of Personal Data Fields (defined in the MailUp settings)
- The Last Name field is the second field in your list of Personal Data Field

For more information about [using Dynamic Tags in MailUp](#), see this [video tutorial](#).

Remember that if you used the *Sync/Segment Customers* feature with the **Send opt-in email to new subscribers** option checked...

- customers that are not already subscribed to the list will be added as *Pending*
- a message to them will be added to the Send Queue, ready to be sent
- the message used for that mailing is the default *subscription confirmation request message* unless you specified another message ID in the corresponding field.

## Filtering customers in Magento vs. MailUp

Although the MailUp extension for Magento allows for automated transfers of useful data from Magento to MailUp, the transaction data available in MailUp remains somewhat limited. There are several cases in which the customer targeting tool added by the extension to Magento allows for filtering that could not be done in MailUp. Here are some examples:

- Most of the transaction data transferred to MailUp refers only to the latest order placed by the customer. E.g. a filter like "Locate everyone that purchased in Q1 of 2012" cannot be done in MailUp as MailUp does not keep a record of every order placed by the customer.
- Magento Customer Groups do not exist in MailUp and cannot currently be mapped to a field in MailUp
- A SKU-based search on a product cannot be done in MailUp

All in all, the transaction data that is transferred to MailUp becomes a great tool for automated, triggered messages (e.g. to contact anyone that has not purchased in over 90 days). The filtering tool in Magento, instead, is a quick and easy way to create targeted groups of customers that can be manually contacted (e.g. a manually executed email marketing campaign).

## Related articles

[Back](#) to an overview of the MailUp Extension for Magento.