



Commerce Cloud Platform Adoption Playbook:

# Customer Groups

Tailor the site experience for different sets of customers.



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# Types of Customer Groups

Customer groups allow you to tailor the site experience for different sets of customers. They enable you to target your content, promotions, and sorting rules to specific segments, providing the right experience to the right customers.

There are three types of customer groups available in Business Manager:

System	Static	Dynamic
Pre-existing groups already available to you and include everyone, registered or unregistered. You do not have to do anything to create these groups.	These groups allow you to assign customers manually. You can add customers to the group manually one by one, or upload a list of customers you segmented in your CRM system.	Use a membership rule to place customers into a particular customer group. Rules can be built based on a number of customer attributes.
<ul style="list-style-type: none"> <li>• Everyone</li> <li>• Registered</li> <li>• Unregistered</li> </ul>	<ul style="list-style-type: none"> <li>• Employees</li> <li>• VIP</li> <li>• CRM Tool</li> </ul>	<ul style="list-style-type: none"> <li>• Geolocation</li> <li>• Visitors from Facebook</li> <li>• Birthday in 30 days</li> </ul>



Figure 1. Types of Customer Groups.

## Dynamic Customer Groups

There are a number of membership rules that can be used to create dynamic customer groups. These rules can be divided into two types, depending on what attributes the membership is based on.

- **Registered and Logged In Customers** - Information can be used from a customer's profile for those who are registered and logged in. These attributes include any information they may have entered when creating their profile. Commerce Cloud can also use their past site activity and segment customers using active data attributes.
- **Customers Who Are Not Logged In**. Segmentation can be applied to all site visitors, without a need for them to log in. This type of membership is based on geolocation and session attributes.

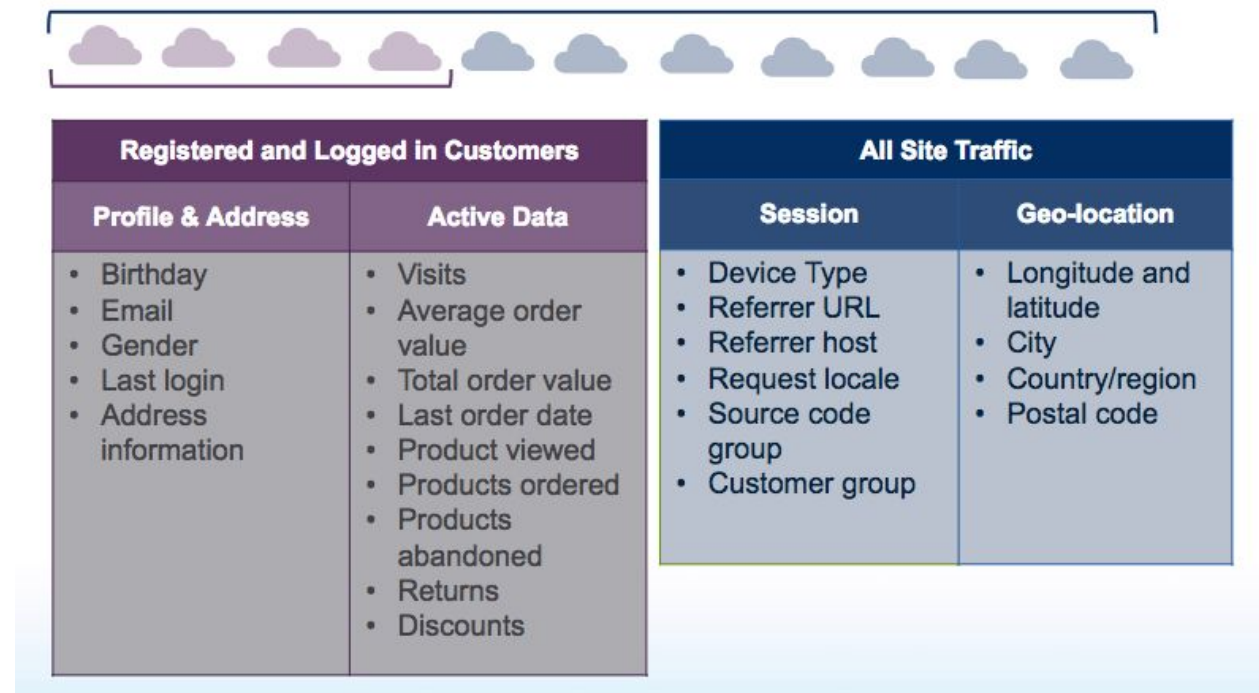
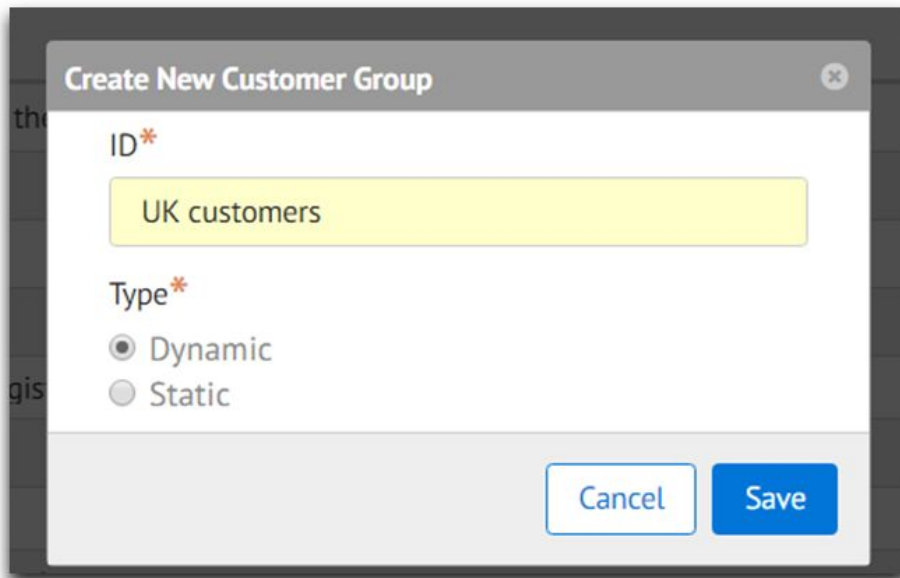
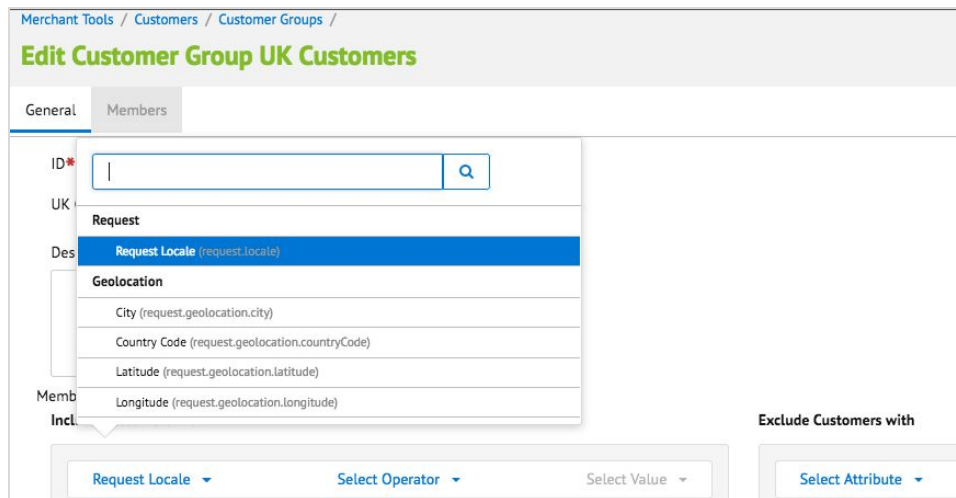


Figure 2. Dynamic Group Membership Types.

Create a new dynamic customer group in **Merchant Tools > Customers > Customer Groups**. Enter a customer group ID and select Dynamic.



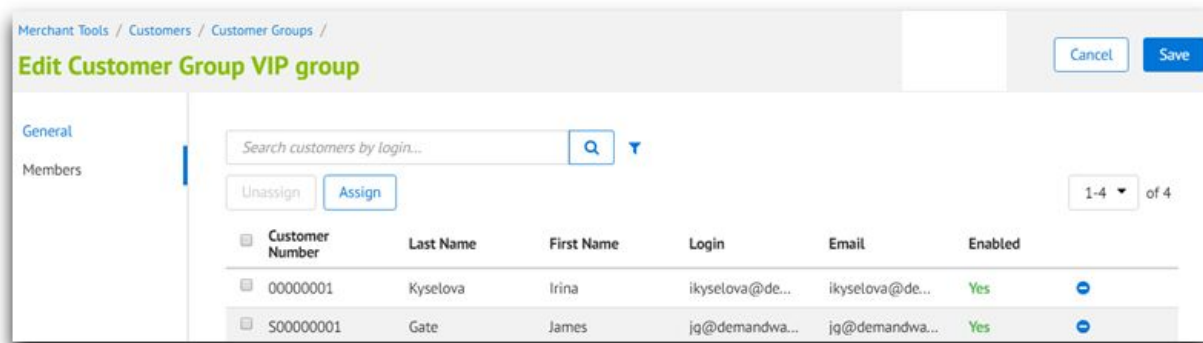
Within the Members tab, select Membership Rules by building your group using available attributes, as well as Include and Exclude functions.



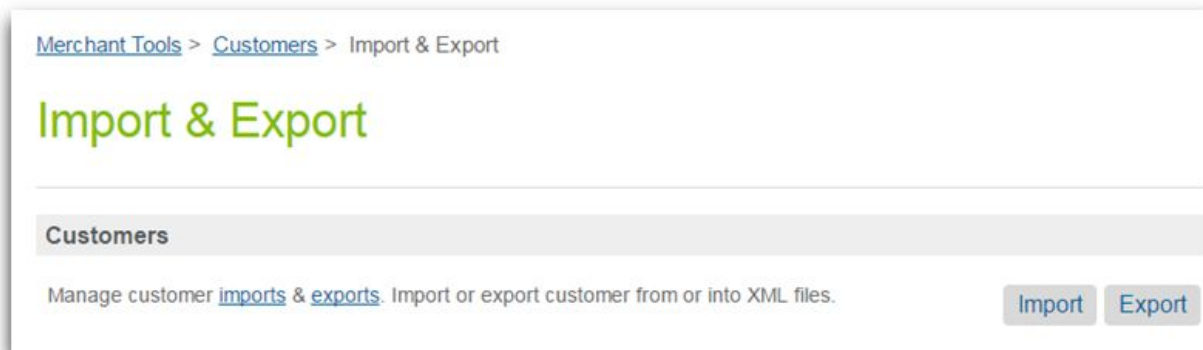
## Static Customer Groups

A static customer group can be created by manually selecting customers if it's a small list or with an XML import list.

To manually select customers, go to **Merchant tools > Customers > Customer Groups** and click on the Members tab and search for customers individually.



To import customers and assign them to a customer group go to **Merchant Tools > Customers > Import & Export**.



## Adding an Experience Based on Location

Using a geo-location customer group allows you to target the site experience based on a customer's location. For this to work, a customer does not need to be logged in and it targets all site visitors.

The functionality leverages GeoLite2 from MaxMind to enable the feature.

### Notes:

- Some coverage and accuracy limitations may exist due to technical nature of Geolocation

- Use the test IP lookup to determine coverage (Administration > Operations > IP Address Geolocation Data)
- As targeting scope narrows, coverage and accuracy decrease. It works better to distinguish larger territories rather than a few geographical objects that are very close to each other.

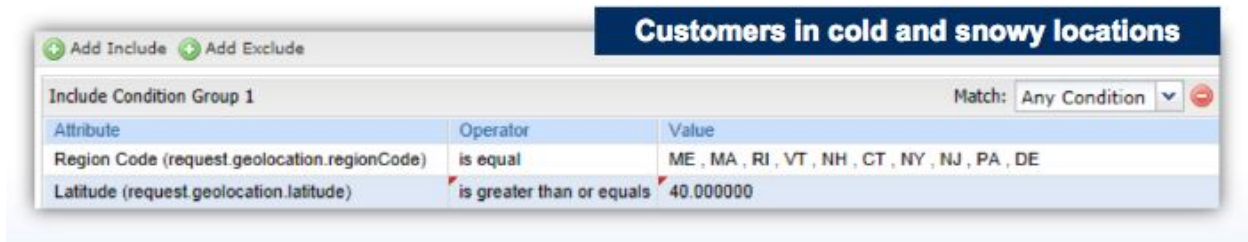


Figure 3. Geo-Location Customer Group

## Altering Experiences Based on Device Types

Another popular segmentation strategy that does not require customers to be logged in is customer group by device type. You can create different customer groups for desktop, mobile and tablet allowing you to target content, promotions or sorting rules to these groups.

You need to use a session custom attribute as your include when creating the customer group and configure as shown below.

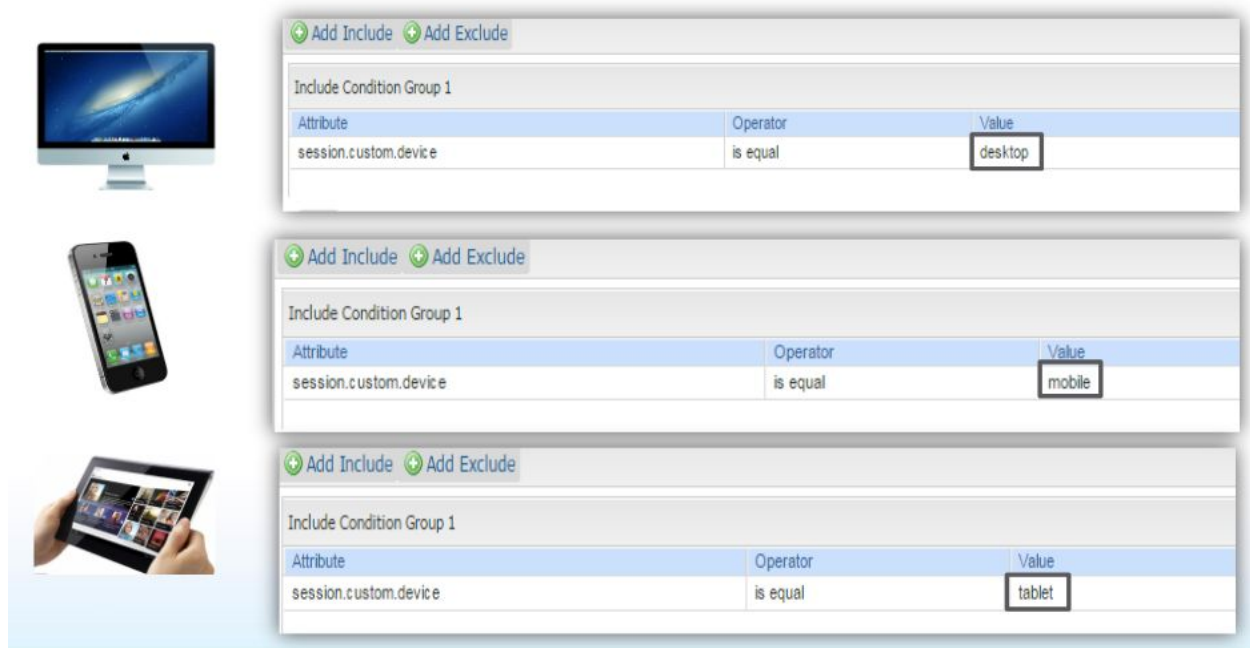


Figure 4. Altering user experience based on device type.

Overview of creating Device Type Customer Groups in Business Manager:

<https://xchange.demandware.com/docs/DOC-31149>

The out-of-the-box device recognition functionality looks at a few devices and systems, such as Android, iPad, and iPhone. If you want to implement a more varied device recognition see best practices here:

<https://xchange.demandware.com/docs/DOC-31849>

**Note:** to test you can't use a device simulator for this or simply look at jump points on your desktop. The groups are only picked up on respective devices or by setting the preview customer group in Staging to a specific device.





## Additional Resources

### On-Demand Videos

Listen to and watch [Platform Adoption Webinars](#).

### Ask the Community

Get answers to your questions from Commerce Cloud experts, partners, and other customers via the [Ask the Community](#) forum on XChange. Commerce Cloud XChange login required.

### 1-on-1 Help

Request a [Commerce Cloud Accelerator](#).

### Upcoming Events & Webinars

Review the [calendar](#) of upcoming Commerce Cloud learning opportunities.