

Groups

Group your customers manually, or via automation.

- [Summary](#)

Summary

Use this page to manage, view and export Customer Groups.

Groups

Displaying 9 group(s)

[+ add a customer group](#)


actions	group id	group name	group type	members
  	7	Post	private	0
  	8	Phone	private	0
  	10	Stressless Furniture	dynamic	0
  	19	Fruit Fans	dynamic	0
  	20	All Customers	dynamic	184

Customer Groups have two main purposes:

1. Direct marketing
2. On site targeting

Groups may be exported as part of integrations with 3rd party marketing platforms

Key to icons

 = edit or type unknown

 = delete

 = download

Group Types

Typically a Group would be a form of communication, e.g. 'SMS', 'Email', 'Post', or a segmentation based on other factors, e.g. 'Bought in the last 3 Months', or Average Spend over £500'.

Public

A Public Group is one that will be displayed to the Customer on your website. This will allow them to opt in to that group for associated communication.

You could use these to encourage a Customer to select their interests, e.g. Public Groups for Brand or Category specific content.

We recommend that you have at least one Public Group for your email marketing, e.g. 'Newsletter', or 'Email'.

These will display as options at account registration:

Join the mailing list

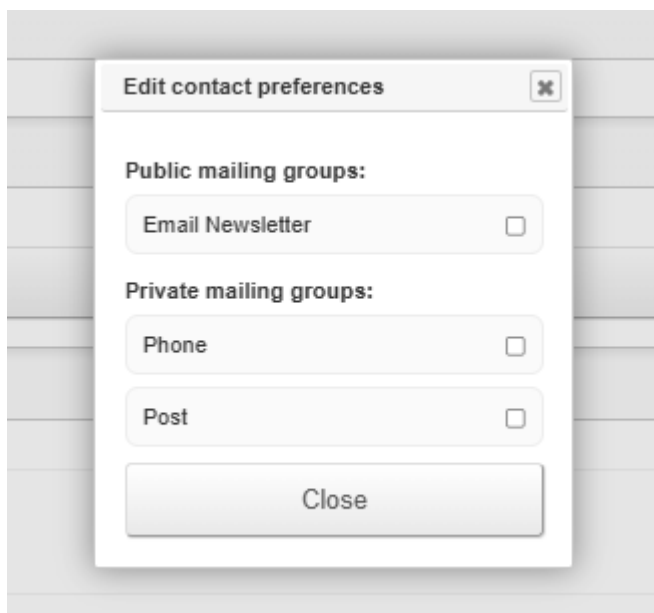
Dinosaurs

Lego

Private

A Private Group will not be displayed to the Customer on your website. They can only be added to Private Groups manually in the CMS or POS.

These should be used to segment your audience, but might also be used in-store to track other contact preferences, e.g.



The image shows a dialog box titled "Edit contact preferences" with a close button in the top right corner. It is divided into two sections: "Public mailing groups:" and "Private mailing groups:". Under "Public mailing groups:", there is a checkbox for "Email Newsletter". Under "Private mailing groups:", there are checkboxes for "Phone" and "Post". At the bottom of the dialog is a "Close" button.

We recommend that you have at least one Group for each contact type, e.g. 'SMS', 'Email', 'Phone', etc., in order to comply with GDPR.

Dynamic

Dynamic Groups are automatically populated with Customers and Site Visitors. It is not possible to for a Customer to opt in to these, or for an Administrator to manually add Customer to one. In

addition, these will never be displayed to a Customer.

Setup

When building a Dynamic Group, you will need to add one or more rules; these will govern which Customers are assigned to that Dynamic Group. In the example below, this would create a Group populated with customers who signed up since the 1st November, but have not yet placed an order:

Rules

datejoined

and	greater than	01/11/2025		update	delete
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and orders

and	equals		0	update	delete
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In this example, the group would contain anyone who had searched, viewed, added to basket or added to wishlist Sony Products:

Rules

brand

or	basket	Sony	update	delete
or	viewed	Sony	update	delete
or	searched	Sony	update	delete
or	wishlist	Sony	update	delete

Customers

Customers will be automatically populated based on those rules, and displayed at the bottom of the page.

Members (2)

*Also includes 8 anonymous guest users

johnny.rico@iconography.co.uk
carmen.diaz@iconography.co.uk

[Download CSV](#)

These may be exported as a CSV.

Anonymous Guest Users

If a Customer meets the criteria, but is not logged into a registered account, they will still be added into the group via a cookie. When they return to the site from their device, they will be automatically treated as being in the Customer Group, even though they are anonymous.

Uses

Marketing

Customer Groups can be used to segment your Customers as well as providing a record of marketing opt in.

Personalised Content

Customer Groups can be used to personalise content for Customers; use these to restrict which [Banners](#) and [Popups](#) are visible to specific Customer Groups.