

# Advanced Newsletter

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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/advanced-newsletter.html>

The Advanced Newsletter extension enhances the default Magento newsletter functionality with a highly customizable user interface and targeted sign-up options. Supports mailing lists, Mailchimp and third party SMTP server. If for any reason Advanced Newsletter has been uninstalled – the native newsletter must still work and contain all the subscribers.

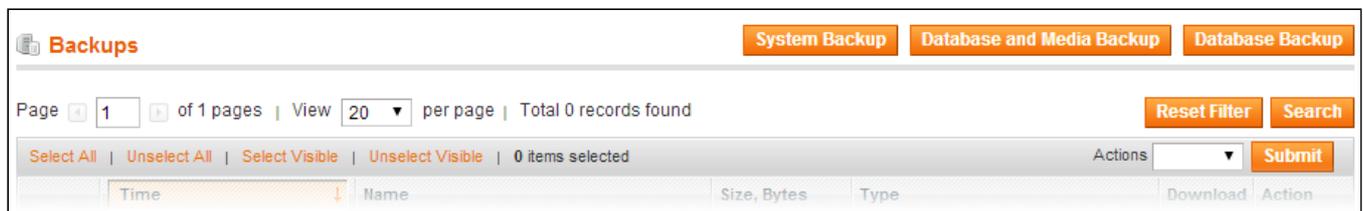
## Installation

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	<b>Enabled</b>
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	<b>Disabled</b>
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

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

- **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

**If you are using a custom theme,**  
read the instructions here.

In case you are using a custom theme, it is recommended to copy the design files to your current theme's folders. In case there are several themes in use at the same store, the design files must be copied to each of them.

- Find this folder in the package: `/step_1/app/design/frontend/base/default/`; copy its content to `/app/design/frontend/[your_package]/[your_theme]/`

- Find this folder in the package: `/step_1/skin/frontend/base/default/`; copy its content to `/skin/frontend/[your_package]/[your_theme]/`

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 Subscription Form for OnepageCheckout Page

To display segments on the OnepageCheckout OrderReview page, you should open the `app/design/frontend/<your_package>/<your_theme>/template/checkout/onepage/review/info.phtml` file, where `<your_theme>` is the name of your current theme and `<your_package>` is your current package. If you haven't ever changed your store's theme or package, **default** values.

Find the following string:

```
<?php echo $this->getChildHtml('agreements') ?>
```

and insert this code after it:

```
<?php echo $this->getChildHtml('awancheckout') ?>
```

***If searched string is missing (old Magento CE versions), add the above code as last line of the file.***

## Cron configuration

The Advanced Newsletter extension uses cron for sending emails and synchronization process. Read the following instructions on setting cron job for your Magento store: [http://www.magentocommerce.com/wiki/1\\_-\\_installation\\_and\\_configuration/how\\_to\\_setup\\_a\\_cron\\_job](http://www.magentocommerce.com/wiki/1_-_installation_and_configuration/how_to_setup_a_cron_job)

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

```
crontab -e
```

And insert the following line:

```
*/3 * * * * php /<path-to-your-installation/cron.php
```

After that exit confirming save request.

Once cronjob is set up and running, the extension will be saving every action in the log, which can be viewed in **System->Configuration->aheadWorks Extensions->Info->aheadWorks Extensions logging->View log**. If you think that the extension does not work as expected, it is recommended to check the log first. If it is empty or contains very few records, it may indicate that your cronjob is not set or set improperly. Normally, every cron launch should add 1 or more entries. Actual quantity of the entries depends on the number of processed events per given cronjob.

## Configuration

Note, after the extension is installed, the native Magento newsletter module will be automatically disabled in *System -> Configuration -> Advanced -> Disable Modules Output*.

Therefore, subscription form will be missing in the frontend until you do the basic configuration for the Advanced Newsletter. The necessary steps are:

1. Define **Subscription Form settings**
2. Create at least one **Segment**

To avoid any possible issues please refrain from enabling native Magento Newsletter as long as Advanced Newsletter extension is installed and enabled.

## General Configuration

General | Form configuration | MailChimp configuration

The extension's general settings are located in **System-> Configuration-> aheadWorks Extensions-> Advanced Newsletter** backend page (they can also be accessed via **Advanced Newsletter-> Settings**).

### General tab

- **Display segments at customer registration form** - shows/ hides segments selector in the Create Account screen.
- **Address to send test emails** - defines the recipient of the test emails
- **Send subscription success notification\*** - enables / disables auto-notifications for subscription
- **Send unsubscription success notification\*** - enables / disables auto-notifications for unsubscription

\*How do I edit notification templates?

#### Managing activation, first subscription, and unsubscription templates

The Advanced Newsletter extension uses several notification templates. By default, they are store in `app\locale\en_US\template\email\`.

The following files belong to the Advanced Newsletter extension:

- `advancednewsletter_subscriber_activation.html`
- `advancednewsletter_subscriber_first_subscription.html`
- `advancednewsletter_subscriber_unsubscription.html`

You can edit these files in the way you like. Also, you can use the following variables to make your emails more personalized:

- `subscriber.first_name` - *display subscriber first name*
- `subscriber.last_name` - *display subscriber last name*
- `subscriber.email` - *display subscriber email*
- `subscriber.phone` - *display subscriber phone*
- `subscriber.confirm_code` - *display subscriber confirm code*
- `subscriber.getSalutationText()` - *display subscriber salutation*
- `subscriber.getConfirmationLink()` - *display confirmation link (only activation template)*
- `subscriber.getUnsubscriptionLink()` - *display unsubscription link*

Example of usage:

```
{{htmlescape var=$subscriber.getSalutationText()}}
```

- **Remove Emails Web copies older than X days** - sets the period before the web copy of an email will be removed.

What does it mean?

Since 2.4.0 version, the Advanced Newsletter extension stores the web copies of all the emails sent through the extension. In case the

recipient's mail agent or service strips the html formatting, images, etc., they have a possibility to view an email in their browser. A special link can be inserted into the outgoing email

### Form configuration tab:

- **Form display style** (available values - In block / AJAX Layer) - defines how the subscription form is represented.

What is the difference?

**In block** style shows the full subscription form on page

**AJAX Layer** shows the Subscribe button only, the form opens in a pop-up after the button is clicked

- **Display name** - enables / disables Name input field for guest subscribers.
- **Display Salutation**, **Salutation 1** and **Salutation 2** - these options allow a subscriber to choose the proper salutation text (E.g., *Mr.* or *Mrs.*). The selected salutation text will be preceding subscriber's name in outgoing emails.
- **Display phone** - shows / hides Phone input field

What if I switch all the options on?

Here's how the subscription form looks like with all options enabled:

Form configuration		
Form display style	In block	[STORE VIEW]
Display name	Yes	[STORE VIEW]
	▲ Adds name fields for guests	
Display salutation	Yes	[STORE VIEW]
Salutation 1		[STORE VIEW]
Salutation 2		[STORE VIEW]
Display phone	Yes	[STORE VIEW]
Segments style	Check boxes	[STORE VIEW]

**NEWSLETTER**

**Select lists\***

- Promotions
- News and Updates
- Electronics Specials

**Email\***

**Salutation\***

Mr. ▼

**First name\***

**Last name\***

**Phone\***

**Subscribe**

- **Segments Style** - sets the segment selector representation

How does it look like?

There are 4 available segments representation types:

#### 1. Check boxes

**NEWSLETTER**

**Select lists\***

- Promotions
- News and Updates
- Electronics Specials

**Email\***

**Subscribe**

#### 2. Multiselect

**NEWSLETTER**

**Select lists\***

- Promotions
- News and Updates
- Electronics Specials

**Email\***

**Subscribe**

### 3. Radio buttons

4. **"None"** - if Segment Style is set to this option, the segments selector will not be displayed in the frontend.

The customers will be automatically subscribed to **All** segments, **Store Default** or **Category Default** segment

#### Placing the subscription form to a custom position

By default, the extension's subscription form will replace the native one. It is also possible to insert the form to any other position via CMS.

To make the subscription button/form (depending on how it has been configured from admin) displayed at any place of the page, insert the following CMS block:

```
{{block type="advancednewsletter/subscribe" inserted_manually="1"}}
```

#### MailChimp configuration tab:

- **Enabled** - select 'Yes', if you want to use MailChimp
- **MailChimp auto-sync** - if 'Yes' is selected, the information about all subscriptions/unsubscriptions to any segment is automatically updated in MailChimp. If 'No' is selected, the 'Advanced Newsletter/MailChimp synchronization' option is available only
- **API key** - a unique MailChimp API key which you should enter in this field to be able to synchronize your data with MailChimp. You can get API key at your MailChimp account configuration - **Account > API Keys & Info** page. If there are no keys, you should create them
- **List ID** - after you specify the **API key** and **XML-RPC URL** values and save the configuration, the List ID selector will show all the existent MailChimp lists. You should select the desired one and *save the config once again*.
- **XML-RPC URL** - the url which allows the Advanced Newsletter extension to connect with MailChimp API. **(Only for Advanced Newsletter versions before 2.5.0)**

To get more information about MailChimp, visit their main page - <http://www.mailchimp.com/>

*Note: At least one group should be created in the list synchronized with MailChimp*

**Please note:**

Magento store view = MailChimp list

Advanced Newsletter segment = MailChimp group

Starting from version 2.5.0 Advanced Newsletter extension works **ONLY** with API version 3.0

## Managing Segments

You can add new and manage the existent Segments in **Advanced Newsletter > Segments Management** backend page.

You must create at least one segment to enable your customers to subscribe.

- **Title** - segment name displayed in the list of segments in the frontend
- **Segment code** - a unique code for each segment. Note that text for this field is case-sensitive and must exactly correspond to the MailChimp text
- **Default store** - if Segments style is set to 'None' and Default Subscription is set to 'Store default' in the **Advanced Newsletter Configuration** page, the customers will be automatically subscribed to the news of the store you specify in this field
- **Default category** - if Segments style is set to 'None' and Default Subscription is set to 'Category default' in the **Advanced Newsletter Configuration** page, the customers will be automatically subscribed to the news of the category you specify in this field
- **Display in store** - the store(s) for the segment to be displayed in
- **Display in category** - the category(s) for the segment to be displayed in
- **Visible at frontend** - if segment will be visible at frontend
- **Display order** - if there are several segments, specify the order for segment displaying in the list

*Note: if any segments style (except None) had been chosen but no segments had been specified to be displayed on this category page, Advanced Newsletter block won't be displayed*

Fields	
Segment Title *	<input type="text" value="Sample Segment"/>
Segment Code *	<input type="text" value="sample-segment"/> <small>Note that this field's text is case-sensitive and must exactly correspond to the MailChimp text This value can not be changed after saving</small>
Default Store *	<input type="text" value="All Store Views"/>
Default Category *	<input type="text" value="-- Any --"/>
Display in store *	<input type="text" value="All Store Views"/> <ul style="list-style-type: none"> <li>Main Website</li> <li>Main Store</li> <li>English</li> <li>French</li> <li>German</li> </ul>
Display in category *	<input type="text" value="-- Any --"/> <ul style="list-style-type: none"> <li>Root Catalog</li> <li>Furniture</li> <li>Living Room</li> <li>Bedroom</li> <li>Electronics</li> <li>Cameras</li> <li>Accessories</li> <li>Digital Cameras</li> <li>Computers</li> </ul>
Visible at frontend *	<input type="text" value="Yes"/>
Visible at checkout *	<input type="text" value="Yes"/>
Display order	<input type="text"/>

## Auto-management rules

Using Auto-management rules at **Advanced Newsletter > Auto-management rules**, you can create rules for automatic subscribing or unsubscribing customers basing on order events.

**Rule Information** tab allows you to define the **Rule Name** and set **Status** (Active / Inactive)

In **Conditions** tab, you can select the criteria for a customer to be automatically subscribed to / unsubscribed from a segment.

*Note: multiple SKUs must be separated by comma without spaces*

In **Actions** tab, you are to define the actual action.

Note: **Remove from** [segments] and **Add to** [segments] options are independent from each other. A given rule can perform either a single action (subscribe *or* unsubscribe), or both kinds of action (subscribe *and* unsubscribe).

The screenshot shows the 'General Information' tab with two input fields: 'Rule Title \*' containing 'sample rule' and 'Status' set to 'Active'.

The screenshot shows the 'Conditions' tab with a dropdown menu open. The dropdown text is 'Please choose a condition to add...'. The menu items are: 'Conditions Combination', 'Store', 'Category', 'Contains any of these SKUs', and 'Order status'.

The screenshot shows the 'Actions' tab with two sections: 'Remove from' and 'Add to'. Each section has a list of categories: 'Cameras', 'Computers', 'Apparel', and 'old\_newsletter\_subscriber'. Below each list is a 'Select All' link.

*Note: Magento Enterprise only. Administrator with limited scope permissions can't save rules*

## Adding SMTP servers

The Advanced Newsletter extension allows sending emails through custom SMTP servers.

You add a new and manage the existent SMTP servers through **Advanced Newsletter -> SMTP Configuration** backend page. You can add external SMTP servers if you want emails to be send through them.

In the **Create (Edit) SMTP** screen, you are to define **Title** (an internal identified), **Server name** (or IP), **User name / Password** combination and **Port**

**Use TLS or SSL** option allows selecting the proper security protocol (if your server does not have any, just set his option to "No")

The screenshot shows the 'Fields' tab with the following inputs: 'Title \*' (test), 'Server name \*' (smtp.gmail.com), 'User name \*' (blurred), 'Password \*' (blurred), 'Port \*' (465), and 'Use TLS or SSL' (SSL). A 'Test connection' button is at the bottom.

*Note, the settings in above screen are typical for Gmail server*

To send emails with **\*@gmail.com** account, you should use **"Application-specific passwords"** (<https://accounts.google.com/IssuedAuthSubTokens>)

Often SMTP-server has a limit for sending, e.g. <http://support.google.com/mail/bin/answer.py?hl=en&answer=22839&topic=1669057&ctx=topic>

**Note:** if SMTP Configuration is not specified, email sending will be processed via standard php mail function. In this case, please, make sure that the email server has been properly configured (<http://www.php.net/manual/en/mail.configuration.php#ini.sendmail-path>) and it is still working.

# Synchronization

Synchronization process in the Advanced Newsletter extension uses cron. Cron is run periodically – it handles 20 items per cron job execution. To set up the cron job, please read the **Cron configuration** section below.

Go to the **Advanced Newsletter > Synchronization** backend page. You can easily import all your newsletter subscribers, templates, and MailChimp subscribers to Advanced Newsletter. Also you can export Subscribers to MailChimp from this page.

There are 2 additional sections at the Synchronization page:

## MailChimp synchronization

- Sync to MailChimp - opens new window with synchronization options

Magento to MailChimp sync options  
 When you click the **Sync to MailChimp** button, a new window with additional options is opened. There you can choose:

- Synchronize - (*subscribed / unsubscribed / subscribed & unsubscribed*)
- Update user names - (*yes / no*) If it is required, you can update existing user names at MailChimp or not

- Sync from MailChimp - opens new window with synchronization options

MailChimp to Magento sync options  
 After you click the **Sync from MailChimp** button, a new window with additional options is opened. There you can choose:

- Synchronize - (*Update statuses / Update list*) Select whether you want to update only statuses of people at your MailChimp subscribers list or the whole list with names, segments, and statuses. If you will choose 'update list' option, updating will be queued and run by cron later.

**MailChimp synchronization**

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**Sync to MailChimp** Opens new window with synchronization options

**Sync from MailChimp** Opens new window with synchronization options

**Synchronization with Magento newsletter**

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**Import Templates** Imports templates from Magento newsletter to Advanced Newsletter

**Import Subscribers** Imports subscribers from Magento newsletter to Advanced Newsletter

## Synchronization with Magento newsletter

Synchronizing with the native Newsletter is a one-time operation, which allows importing existent templates and

## subscribers

- Import templates - imports templates from Magento newsletter to Advanced Newsletter
- Import subscribers - imports subscribers from Magento newsletter to Advanced Newsletter, assigns them to "*old\_newsletter\_subscribers*" segment

*Note: The synchronization is always global. So if you run the Magento Enterprise store, please remember - when the admin with limited scope permissions runs the synchronization, subscribers of all stores are synchronized*

## Managing subscriptions

### Subscribers Grid

The grid is located in **Advanced Newsletter-> Subscribers**.

The grid lists all the subscribers, both registered customers and guest subscribers. Through this grid, you can:

- subscribe to / unsubscribe from specific segments
- delete a subscriber record
- export subscribers list to a .csv or .xml file

### Manage Customers Grid

The grid is located in **Advanced Newsletter-> Manage Customers**.

The grid lists all the registered customers, disregarding their Newsletter Subscription status. Through this grid, you can subscribe to / unsubscribe from specific segments.

Also you can considerably increase filters functionality by installing the Market Segmentation Suite extension.

Do not use mass actions for subscription and unsubscription of customers at **Customers > Manage customers**. They work only for Magento native newsletter only. Use **Advanced Newsletter -> Manage Customers** instead of it.

## Creating templates

The Advanced Newsletter extension stores its email templates separately from the native Newsletter ones. You can manage extension's templates and queue them for sending through **Advanced Newsletter > Templates** backend page.

The basic template options (*Name, Subject, Sender, etc*) work the same as the native ones.

The extra parameters are:

- **Segment Codes** - in this selector, you can select the subscribers segments the email is meant for
- **MSS Rule** (requires [Market Segmentation Suite](#) extension) - allows to apply an MSS filter to the recipients.  
*Note, if you apply an MSS rule in the Edit Template screen, a new subscribers segment will be created and saved automatically*
- **SMTP account** - allows selecting a specific SMTP server that will be used for the sendout

Template Information	
Template Name *	sample-template
Template Subject *	sample-subject
Sender Name *	my store
Sender Email *	store@example.com
Segments Codes *	<div style="border: 1px solid gray; padding: 2px;">           General News            Market_Segmentation_Suite_rule_1         </div> ▲ Select All
MSS Rule *	<div style="border: 1px solid gray; padding: 2px;">           Customers with 3+ orders         </div> ▲ Send newsletter to customers according to the MSS rule
SMTP account *	None

For the content of the emails, a number of new variables are added:

You can use 4 macrofields:

To give customers an opportunity to unsubscribe from newsletters:

```
{{var awunsubscribe}}
```

To give customers an opportunity to unsubscribe from a specific segment:

```
{{var awunsubscribefromsegment}}
```

To give customers an opportunity to go directly to the login page and then manage their subscriptions:

```
{{var awloginpage}}
```

To insert the link to the [web copy](#) of an email:

```
{{var external_url}}
```

Also the following variables are available:

- subscriber.first\_name - *display subscriber first name*
- subscriber.last\_name - *display subscriber last name*
- subscriber.email - *display subscriber email*
- subscriber.phone - *display subscriber phone*
- subscriber.getSalutationText() - *display subscriber salutation*

## Market Segmentation Suite integration

Market Segmentation Suite (MSS) extension in conjunction with Advanced Newsletter can prove a useful marketing tool by implementing precise email targeting possibilities.

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

Click to see the screenshot

The screenshot shows the 'Template Information' form. The 'MSS Rule' field is highlighted with a green box. The dropdown menu for 'MSS Rule' is open, showing 'MSS-sample-rule' selected. A tooltip is visible below the dropdown, stating: 'Send newsletter to customers according to the MSS rule'. The 'Template Content' field at the bottom contains the code: '<p>Follow this link to unsubscribe {{var awunsubscribe}}</p>'.

## Uninstall

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_Advancednewsletter.xml` and change the following line:

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

to

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

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

- Enable the native Magento Newsletter via **System > Configuration > Advanced > Disable Modules Output** tab
- 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_advancednewsletter_automangement';
DROP TABLE IF EXISTS 'aw_advancednewsletter_cache';
DROP TABLE IF EXISTS 'aw_advancednewsletter_queue';
DROP TABLE IF EXISTS 'aw_advancednewsletter_queue_link';
DROP TABLE IF EXISTS 'aw_advancednewsletter_queue_store_link';
DROP TABLE IF EXISTS 'aw_advancednewsletter_segment';
DROP TABLE IF EXISTS 'aw_advancednewsletter_smtp';
DROP TABLE IF EXISTS 'aw_advancednewsletter_subscriber';
DROP TABLE IF EXISTS 'aw_advancednewsletter_subscriptions';
DROP TABLE IF EXISTS 'aw_advancednewsletter_template';
DROP TABLE IF EXISTS 'aw_advancednewsletter_templates';
```

```
delete from core_resource where code ='advancednewsletter_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.

*Note: Making the Advanced Newsletter module disabled in the **System > Configuration > Advanced** section in the backend, does NOT disable the extension completely. Native Magento newsletter will work incorrectly then.*

## 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.

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

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Ни одной