

**A**masty

For more details see the [Follow Up Email for Magento 2](#) extension page.

# Follow Up Email for Magento 2

Follow up orders with discount coupon for next purchase, send Birthday greetings and nay more!

- Send a message on order status change
- Greet new customers with encouraging discounts
- Do special occasion email campaigns, like Christmas or customer birtdays
- Create unique template for each email sent by extension
- Send multiple emails with different delay intervals

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## Troubleshooting checklist

### Emails are not being sent automatically

Extension is working with Magento cron jobs to schedule and send emails. If Magento cron is not configured or configured incorrectly the extension won't be sending any emails.

To solve this, please check [this article](#) to see how Maganto cron is configured.

### Can't use email template in the rule

Available templates in the **Schedule** are being filtered by the **Start Event** you have selected in the rule. In the list of templates you will see only emails created based on default Follow Up template for corresponding start event.

[In the following guide we'll be creating new template for "Order Created" Start Event:](#)

## General

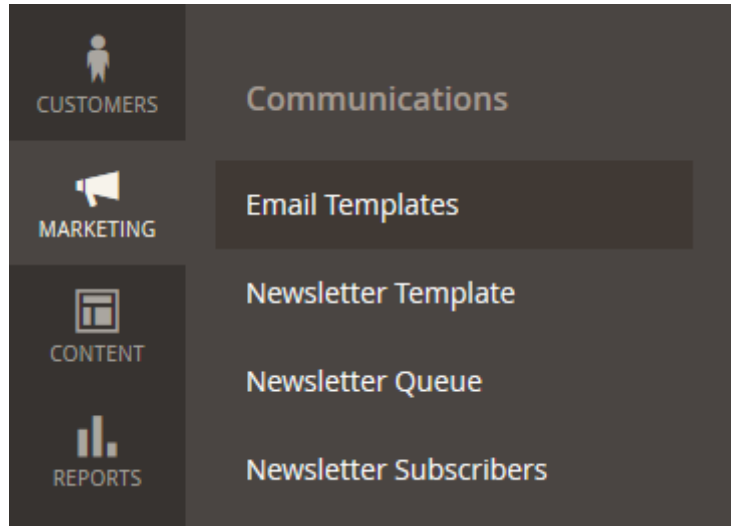
Name \* "Thank you" discount!

Start Event \*

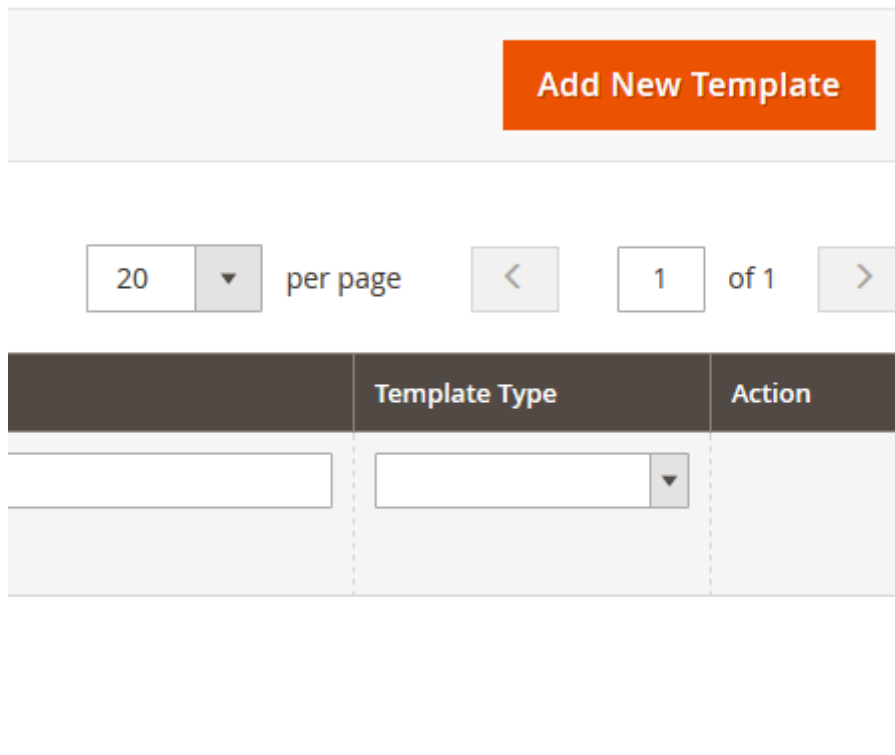
Created	▲
<b>Order</b>	
Created	
Shipped	
Invoiced	
Completed	
Cancelled	
<b>Customer</b>	
No Activity	
Changed Group	
Subscribed to Newsletter	
Birthday	
Registration	
<b>Wishlist</b>	
Product Added	
Shared	
Wishlist on sale	
Wishlist back in stock	
<b>Date</b>	
Date	

This is how the new template is created:

- Navigate to **Marketing - Communications - Email Template** menu



- Being in **Email Templates** menu hit **Hit Add New Template** button



- In **Load default template - Template** find **Amasty Follow Up Email: Order Created**, select it and hit **Load Template**

### Load default template

Template

Amasty\_Followup

- Amasty Follow Email Footer
- Amasty Follow Email Footer Modern**
- Amasty Follow Email Header
- Amasty Follow Email Header Modern
- Amasty Follow Up Email: Customer Birthday
- Amasty Follow Up Email: Customer Changed Group
- Amasty Follow Up Email: Customer No Activity
- Amasty Follow Up Email: Customer Registration
- Amasty Follow Up Email: Customer Subscribed to Newsletter
- Amasty Follow Up Email: Customer Wish List Product Added
- Amasty Follow Up Email: Customer Wish List Product Added modern Christmas theme I
- Amasty Follow Up Email: Customer Wish List Product Added modern Christmas theme II
- Amasty Follow Up Email: Customer Wish List Product Added modern autumn theme
- Amasty Follow Up Email: Customer Wish List Product Added modern spring theme
- Amasty Follow Up Email: Customer Wish List Product Added modern summer theme
- Amasty Follow Up Email: Customer Wish List Product Added modern winter theme
- Amasty Follow Up Email: Customer Wish List Product Back In Stock
- Amasty Follow Up Email: Customer Wish List Product Back In Stock modern Christmas theme I
- Amasty Follow Up Email: Customer Wish List Product Back In Stock modern Christmas theme II

- Specify the new template's name and make the changes you want

### Template Information

Template Name \*

Template Subject \*

- Save it. Now you can use newly created template in your Follow Up rules

### Schedule

Transactional Email	Delivery Time
<input type="text" value="Amasty Follow Up Em"/> ▲	Days <input type="text"/>
<input type="text" value="Amasty Follow Up Email: Order Created"/>	Hours <input type="text" value="-"/> ▼
<b><input type="text" value="Order Created NEW!"/></b>	Minutes <input type="text" value="5"/> ▼
<input type="button" value="Add Record"/>	

## Usage examples

### Christmas sale

Imagine the situation that you are going to hold a great Christmas sale. To keep more customers informed about the event, you can send them follow up emails, containing the corresponding information.

To make this happen we will have to complete two steps:

- to create the follow up email template;
- to set up a follow up rule with the template created.

Step 1. To create the mentioned email template, go to **Marketing > Communications > Email Templates > Add New Template** button.

Considering that we're going to send notifications about the upcoming Christmas sale to those customers, who will complete orders, during the specified period, load order-related template 'Amasty Follow Up Email: Order Completed modern Christmas theme I' and specify its name and subject in the corresponding fields:

#### Load default template

Template  ▼

#### Template Information

Template Name \*

Template Subject \*

In the **Template Content** field, you can make adjustments to the text and style of the email template. For instance, you can choose one of the available product list designs: 'table', 'table\_modern', 'list' or 'list\_modern'. To switch to a new product list design, find product listing handle and change the 'mode' setting to the appropriate value, as it is shown below.

Template Content \*

```
<tr class="email-body">
  <td class="am-products-container">
    {{layout
      handle="amfollowup_email_crosssell"
      quote=$quote
      history=$history
      mode=list_modern
      image=yes
      price=yes
      priceFormat=exculdeTax
      descriptionFormat=short
      discount=yes
    }}
  </td>
</tr>

<tr>
  <td class="am-button-box">
    <a href="{{config path="web/secure/base_url"}}" title="Visit {{config
      path="web/secure/base_url"}}" class="am-button red-orange">Visit Our Store</a>
  </td>
</tr>
```

Step 2. To create a rule, go to **Marketing > Follow Up > Rules** and hit the **Create New Rule** button.

Specify the name of the rule in the Name field and choose the necessary start event in the Start Event field. To send emails to the customers, who have completed orders, select the Order Completed start event.

You can also set up one or more Cancel Conditions on the **General** tab, that will block the emails sending (if several notifications are going to be sent to customers). Since we're not going to barrage customers with emails and send only one notification, there is no need to set up Cancel Condition. The last action to do is to define the schedule of emails sending:

### Schedule

Transactional Email	Delivery Time	Coupon
Christmas sale. ▼	Days <input type="text"/>	Type
	Hours <input type="text" value="1"/>	Discount Amount
	Minutes <input type="text" value="-"/>	<input type="checkbox"/> Use Shopping Cart Rule
		Percent of product price discount ▼
		10
		<a href="#">Delete</a>
		<a href="#">More</a>
<input type="button" value="Add Record"/>		

Choose the template's name you've created on the first step in the **Transactional Email field**, specify the exact **Delivery Time** and determine the kind of discount to be applied to the products in the list, if needed. If you want to send more notifications, click to the **Add Record** button and specify the necessary details for each additional notification to be sent. As a result, the number of specified notifications will be sent to relevant customers according to the schedule.

### Schedule

Transactional Email	Delivery Time	Coupon
Christmas sale. ▼	Days <input type="text"/>	Type
	Hours <input type="text" value="1"/>	Discount Amount
	Minutes <input type="text" value="-"/>	<input type="checkbox"/> Use Shopping Cart Rule
		Percent of product price discount ▼
		10
		<a href="#">Delete</a>
		<a href="#">More</a>
<input type="button" value="Add Record"/>		
Amasty Follow Up Email: Or ▼	Days <input type="text"/>	Type
	Hours <input type="text" value="-"/>	Discount Amount
	Minutes <input type="text" value="5"/>	<input type="checkbox"/> Use Shopping Cart Rule
		None ▼
		<input type="text"/>
		<a href="#">Delete</a>
		<a href="#">More</a>
<input type="button" value="Add Record"/>		

Here's the sample of a letter the customers will receive:



owner@example.com

Reply to this mail

## Dear Veronica Costello !

We know this is a busy time of year, but let us draw your mind from the fuss for a second.

We've just launched our CHRISTMAS SALE!

So, hurry up to spoil yourself with new purchases in the year ending.

And good luck in the coming year!

As always, thank you for your business and the confidence you have placed in us!



### Wayfarer Messenger Bag

~~\$45.00~~

**\$40.50**

[View Item](#)



### Rival Field Messenger

~~\$45.00~~

**\$40.50**

[View Item](#)



### Complete Track Tote

~~\$32.00~~

**\$28.80**

[View Item](#)



### Savy Shoulder Tote

~~\$32.00~~

**\$28.80**

[View Item](#)

[Visit Our Store](#)

## General extension settings

Extension configuration is located at **Stores > Configuration > Amasty Extensions > Follow Up Email**

### General



The coupon is available only for particular customer

[global] If the option is disabled the coupon can be used by all customers.

Winback Period

[store view]  
in days

Birthday Offset

[store view]  
Change this to trigger Customer Birthday Start Event before actual birthday date

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### Sender Details



Sender Name

[store view]

Sender Email

[store view]

Sends copy of emails to

[store view]

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### Import Blacklist



CSV File  No file selected.

[global]

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### Testing



Safe Mode

[global]

When safe mode is activated, the extension sends emails only to the test email, **nothing will be sent to customers**

Recipient Email

[global]

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### Emails



Header Template

[global]

Footer Template

[global]

- **The coupon is available only for particular customer** - when enabled, only the customer who received the email will be able to apply the coupon on the cart.
- **Winback Period** - period in days after which customer will be considered not active. Used for **Customer - No Activity** start event.
- **Birthday Offset** - if you want to trigger **Birthday** start event before the actual birthday date, you can set the offset in days in this setting.
- **Sender Name** - value provided here will be inserted in **From - Name** field of the follow up email
- **Sender Email** - same as the setting above, but for **From - Email** field
- **Sends copy of emails to** - copy of every follow up email will be sent to address provided here
- **Import Blacklist** - here you can import CSV with blacklisted email addresses
- **Testing - Safe Mode** - when enabled, all emails will be sent to address provided in the setting below
- **Testing - Recipient Email** - email address for test emails
- **Header/Footer Template** - templates for header and footer parts of follow up emails.

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## Follow Up rule settings

Rules can be created at **Marketing > Follow Up Email > Rules**

### General

## General

**Name \***

**Start Event \***

**Cancel Event**

- Customer logged in
- New Order Placed
- Customer clicked on a link in the email
- Customer wishlist shared
- Order Becomes: Canceled
- Order Becomes: Closed
- Order Becomes: Complete
- Order Becomes: Processing

**Send to New sletter Subsc ribers Only**

**Status**

- **Name** - name of the Follow Up rule.
- **Start Event** - event which starts email sending routine.
- **Cancel Event** - here you can set the event which will cancel further emails from being sent to a customer. For example, with **Order Becomes: Canceled** Cancel Event enabled, if rule is configured to send three emails but if order was cancelled after the customer got the first email, two other emails will not be sent to a customer anymore.

Please note that list of available Cancel Events depends on Start Event you are using. For example, order status related Cancel Events will be available only for order status related Start Events.

- **Send to Newsletter Subscribers Only** - when enabled, Follow Up rule will work only for customers who subscribed to newsletter email.
- **Status** - enables and disables the rule.

## Stores & Customer Groups

### Apply In

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Stores

**Main Website** ^

**Main Website Store**

Default Store View v

⋮



Leave empty or select all to apply the rule to any store

### Apply For

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Customer Groups

NOT LOGGED IN ^

General

Wholesale

Retailer v

⋮

Leave empty or select all to apply the rule to any group

- **Stores** - limits the stores where the rule will be applied. If nothing is selected, rule will be applied to all stores.
- **Customer Groups** - controls on which customer groups the rule will be applied. If nothing is selected, rule will be applied to all groups.

## Sender Details

### Sender Details

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Name

Email

Sends copy of emails to

Here you can set the details which will be put into 'From' fields of the email. These settings when set will overwrite some [general settings](#) of the extension.

## Google Analytics

### Google Analytics

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Campaign Source

**Required.** Use **utm\_source** to identify a search engine, newsletter name, or other source.

*Example:* utm\_source=google

Campaign Medium

**Required.** Use **utm\_medium** to identify a medium such as email or cost-per-click.

*Example:* utm\_medium=cpc

Campaign Name

**Required.** Used for keyword analysis. Use **utm\_campaign** to identify a specific product promotion or strategic campaign.

*Example:* utm\_campaign=spring\_sale

Campaign Term

Used for paid search. Use **utm\_term** to note the keywords for this ad.

*Example:* utm\_term=running+shoes

Campaign Content

Used for A/B testing and content-targeted ads. Use **utm\_content** to differentiate ads or links that point to the same URL.

*Example:* utm\_content=logolink or utm\_content=textlink

Here you can set Google Analytics parameters which will be added to the links in Abandoned Cart emails. Please check the [Google Analytics help articles](#) for more details.

## Schedule

### Schedule

Transactional Email	Delivery Time	Coupon
Order Created NEW! <input type="button" value="v"/>	Days <input type="text"/>	Type <input type="text" value="Percent of product price discount"/> <input type="button" value="v"/>
	Hours <input type="text" value="1"/> <input type="button" value="v"/>	Discount Amount <input type="text" value="5"/>
	Minutes <input type="text" value="-"/> <input type="button" value="v"/>	<input type="button" value="More"/>
<input type="button" value="Add Record"/>	<input type="checkbox"/> Use Shopping Cart Rule	<input type="button" value="Delete"/>

- **Transactional Email** - email template used. If you want to add your own template please [check here](#) how it can be done.
- **Delivery Time** - delay between cart abandonment and email sending.
- **Coupon** - here you can configure the promotion for abandoned carts. When email is sent, new promotion rule with coupon code will be generated in Cart Price Rules menu, and the coupon from this rule will be put into email.
- **Use Shopping Cart Rule** - works similarly to the setting above, but instead of creating new promo rule for each coupon it will put the coupon in the existing rule. With this feature you can configure a rule with complex conditions and use it for your abandoned cart promotions.

Please note that 'Use Auto Generation' option in the promotion rule have to be enabled for this rule to appear in the list.

## Conditions

### Conditions (don't add conditions if need all products)

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

Subtotal equals or greater than 100

- **Condition tree** - if there are some conditions, the rule will activate only when conditions are met. Of there are no conditions set, the rule will be active all the time.

Please note that Conditions tab will be available only for order-related Start Events like Order Created

## Test



Search [Reset Filter](#) 2 records found 20 per page 1 of 1

	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status
	<input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>	<input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>	From <input type="text"/> To <input type="text"/>	<input type="text"/>
<a href="#">Send</a> to test@example.com	000000001	Main Website Main Website Store Default Store View	Nov 15, 2017, 1:46:49 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing
<a href="#">Send</a> to test@example.com	000000002	Main Website Main Website Store Default Store View	Nov 15, 2017, 1:46:50 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete

Here you can send test email to check how the emails look.  
 Please note that in this list you will see all quotes from your Magento. No filtering by conditions or event store view is applied there. This tab is for testing purposes only.

From:  
<https://amasty.com/docs/> - **Amasty Extensions FAQ**

Permanent link:  
[https://amasty.com/docs/doku.php?id=magento\\_2:follow-up-email](https://amasty.com/docs/doku.php?id=magento_2:follow-up-email)

Last update: **2018/06/19 11:27**

