

TRANSACTIONAL EMAIL TESTER USER GUIDE

Version 1.0.2



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INTRODUCTION

If you've ever spent much time working with Magento, you've probably realized that the tooling around transactional emails (e.g. new customer signup, order confirmation, shipping confirmation, etc.) is quite limited. While Magento does allow merchants to extend out-of-the-box (OOTB) templates, the built-in raw text editor for updating these templates can be challenging to work with. Miss a closing tag on an element and your transactional emails (that customers will see) can be completely broken.

In addition to the challenges in creating/updating templates, testing before launching new transactional emails is overly complicated. Merchants can preview their changes but cannot specify actual data to be used within the previewed template. So, in order to get an accurate representation of the new email, one must enable the email and walk through the entire process that results in that email being sent (e.g. creating a customer and placing an order).

Our Transactional Email Tester for Magento allows merchants to take more control over how they build and test these emails. We've introduced the ability to create tests for any of the OOTB Magento transactional emails. Within these tests, users can define data sets using actual store data. Once a test is fully configured, the email can be sent to anyone on your team *before* it's launched on your site. If something doesn't look right on your email, update it, and rerun your tests until it's right.

Our goal for this module is to help you make your transactional emails more engaging than the bland, default Magento email templates.

INSTALLATION

To install modules purchased on the Magento Marketplace, you must first create a composer authentication profile.

Get Access Keys to your Marketplace Purchase

Follow these steps to get your Access Keys for Transactional Email Tester.

- Sign into your [Marketplace Account](#).
- In the upper-right corner next to your name, click the down arrow and choose **My Profile**.
- Open the **My Access Keys** page in your Marketplace account
- On the **Marketplace** tab under **My Products**, click **Access Keys**, and then do one of the following:

- a. Check to see if you already have a set of access keys for your Marketplace purchases. You can create multiple sets of access keys for different purposes.
- b. Click **Create a New Access Key**. Enter a name for the new key pair and click **OK**. Valid characters include upper- and lowercase characters and hyphens instead of spaces. When complete, click **OK**.

You will use these keys to complete your install from Magento Marketplace.

Connect to Marketplace Repository

From your Magento root directory, execute the following statement to update auth.json:

```
composer config -auth http-basic. transactional-email-tester $PUBLIC_KEY  
$PRIVATE_KEY
```

Install via Composer

Before installing, we recommend that you backup your Magento files and database as you would when installing any Magento module.

Run the following command for the root of your Magento 2 application:

```
composer require argondigital/transactional-email-tester  
php bin/magento setup:upgrade  
php bin/magento setup:di:compile  
php bin/magento setup:static-content:deploy -f  
php bin/magento module:enable argondigital/transactional-email-tester
```

Please note, the email tester has a dependency on a core ArgonDigital module that provides common functionality for all of our modules. Installing argondigital/transactional-email-tester will also install argondigital/core into your Magento instance.

SETTINGS

Transactional Email Tester general settings can be found in Admin panel → [Stores](#) → [Configuration](#) → [ArgonDigital Extensions](#) → [Transactional Email Tester](#)

The general settings allow you to specify the default settings for test emails generated from the Transactional Email Tester module.

The screenshot displays the 'Configuration' interface. On the left is a vertical sidebar with icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, Argondigital, System, and Partners & Extensions. The main content area is titled 'Configuration' and shows 'Scope: Default Config'. A 'Save Config' button is in the top right. The 'General' settings are expanded, showing 'Subject Prefix' (empty text field) and 'Subject Timestamp' (dropdown menu set to 'No').

Figure 1: Module General Settings

Subject Prefix

Add subject prefix text for test emails. Each email generated from Transactional Email Tester will be prefaced with the text specified in the Subject Prefix field. This is useful for distinguishing real store emails from those sent via the tester.

Subject Timestamp

Select Yes to append a Timestamp to the subject of each test email generated from Transactional Email Tester.

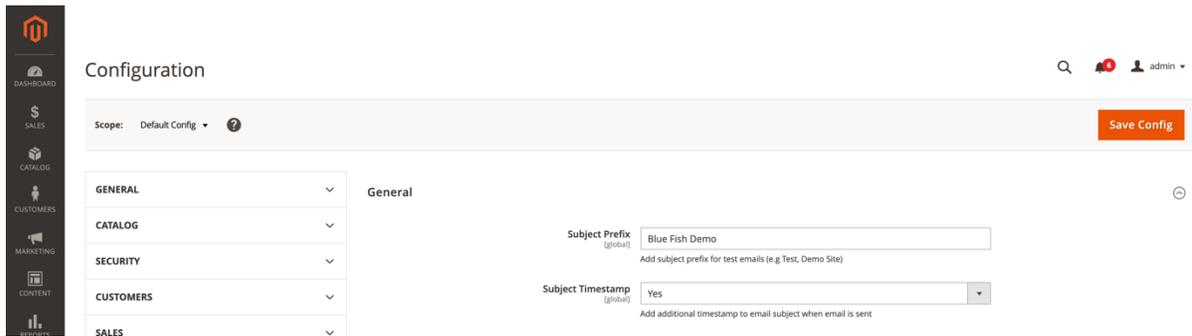


Figure 2: Email Subject Prefix and Timestamp Settings

CREATING EMAIL TESTS

Transactional Email Tester tests can be found on the Magento Admin sidebar → [ArgonDigital](#) → [Transactional Email Tests](#)

The Transactional Email Tests grid lists all transactional email tests added by an administrator. Use the standard grid controls to filter the list and make any adjustments to the columns.

The duplicate action will make a copy of the test along with any test data sets that have been associated with the test. The name of the duplicated test will be the name of the original test with “Duplicated” appended to it.

ID	Test Name	Test Description	Scheduled?	Action
2	Blue Fish New Order Confirmation Email Test Logged in Base	Testing New Order Confirmation Email Transactional Email Template	No	Select
3	Blue Fish New Order Confirmation Email Test Logged in Luma	Testing New Order Confirmation Email Transactional Email Template	No	Select
4	Blue Fish New Order Confirmation Email Test Guest Luma	Testing New Order Confirmation Email Transactional Email Template	No	Select
5	Blue Fish New Order Confirmation Email Test Guest Base	Testing New Order Confirmation Email Transactional Email Template	No	Select
7	Blue Fish New Order Confirmation Email Test Guest Base Duplicated	Testing New Order Confirmation Email Transactional Email Template	No	Select

Figure 3: Transactional Email Test Grid

Columns

Column	Description
ID	A unique numeric identifier that is assigned when the test is created.
Test Name	A unique name for the email test.
Test Data Description	A description for the email test.
Schedules	Indicates On Demand vs scheduled test
Action	Edit, Delete, or Duplicate

New Transactional Email Test

Test Information

Test Name

Test Description

Email Template to Use

Usage Area

Select a usage area to match the selected email template. Required to accurately map the test data to template fields. NOTE: If you've previously added Test Data Sets for this test and change the usage area, those Test Data Sets will no longer appear in the grid below. However, they will be saved. If you change usage area back to its original value, the existing Test Data Sets will re-appear.

"To" Address(es)
Separate multiple email addresses with comma

"CC" Address(es)
Separate multiple email addresses with comma

"BCC" Address(es)
Separate multiple email addresses with comma

Scheduled Testing No
When disabled, the test will only run on demand

Figure 4: New Transactional Email Test

Add a new transactional email test

1. On the Admin sidebar, go to [ArgonDigital](#) → [Transactional Email Tests](#).
2. Select Add New Test.
3. Under Test Information, enter the email test data.
4. Enter a **Test Name** for the test.
5. Enter a **Test Description** for the test.
6. Select an Email Template to Use.
7. Select a **Usage Area** to match the selected email template. This field is required to accurately map the test data to template fields. This selection defines the area where the email will be used to determine the correct variables needed by the email template. Note: Changing the usage area will not remove any associated test data set(s) for the previously selected usage area. So, if you make a mistake by selecting the wrong usage area, you can always go back to the previous usage area and your old test data will be shown in the Test Data Sets grid below.
8. Enter email recipients for this test in "To" Address(es). Separate multiple email addresses with a comma.
9. Enter cc email recipients in "CC" Address(es). Separate multiple email addresses with a comma.
10. Enter bcc email recipients in "BCC" Address(es). Separate multiple email addresses with a comma.

11. Activate **Scheduled Testing** to configure test email frequency. When disabled, the test will only run on-demand.
12. When complete, click Save and Continue Edit.

Edit/View transactional email test details

On the Admin sidebar, go to [ArgonDigital](#) → [Transactional Email Tester](#) → [Transactional Email Tests](#). Find the email test record and click “Edit” in the Action column.

In the test information form, choose the information you need to edit and make the necessary changes. When complete, click Save or Save and Continue Edit.

CREATING TEST DATA SETS

To execute an email test and preview a populated version of the selected email template, you must create one or more test data sets. The Run Test button will be disabled until a test data set has been created for the test.

Test data sets also allow you to override default variables with custom scalar values during the test.

Test Data Set

← Back Preview Save

General

Template New Order

Test Data Set Name

Is test active? Yes

Send test on behalf of Store View Main Website Store

Test Data

Order entity id Select

Custom Data

If the selected email template contains any custom fields that do not exist within the specified usage area (e.g. a custom field used by a 3rd-party module or one you've created), you will need to add those fields here and specify the field value that will be used in the test. This will ensure the field is populated correctly in the test email and preview. It also allows to override default variables with custom scalar values during the test.

Field Name *	Field Value *	Action
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Figure 5: Test Data Set

About Custom Data

The transactional email tester is aware of all out-of-the-box Magento email templates, along with the data objects and properties that make up those templates. As such, when you select an OOTB template and usage area, we're able to predict the test data that will be needed.

If you've modified the OOTB templates or if you're using a module that's done this or provides its own custom templates, the transactional email tester module won't know about any non-OOTB variables that may be used within those templates.

To get around this issue, you can specify "Custom Data" for each test data set that you create. Simply add a new Custom Field using the "Field Name" that matches the variable in the template, along with a value. When you preview or run the test data set, the module will "inject" the values you've specified for each of the custom fields.

Custom field values can also be used to override default variables with custom scalar values during the test as illustrated below.

Test Data

Rma Id Select

Comment

Custom Data

If the selected email template contains any custom fields that do not exist within the specified usage area (e.g. a custom field used by a 3rd-party module or one you've created), you will need to add those fields here and specify the field value that will be used in the test. This will ensure the field is populated correctly in the test email and preview. It also allows to override default variables with custom scalar values during the test.

Field Name *	Field Value *	Action
<input type="text" value="comment"/>	<input type="text" value="Override 'This is a test comment'"/>	

Figure 6: Override a Test Data with Custom Field value.

Email Preview ×

New Comment for RMA #00000001

Customer Anastasia Test has left a new comment:
Override 'This is a test comment'

Figure 7: Email Preview with Custom Field override.

What if you don't know all the possible data fields that are used in the selected template? If you choose a test data set and hit "Preview", a table of all variables without a specified value is shown below the email preview:

Payment Method	Shipping Method
Purchase Order	Flat Rate - Fixed
Purchase Order Number 123123123	

Items	Qty	Price
Terence's Dog	23	\$345.00
SKU: terences-dog		
	Subtotal	\$345.00
	Shipping & Handling	\$115.00
	Grand Total	\$460.00

(512) 527-9952	ArgonDigital - Dev - Enterprise 3575 Far W Blvd #26544, Austin, Texas 78731, United States
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Variable Name	Label	Template Source
{{order_data.email_customer_note}}	-	New Order Template
{{shipping_msg}}	Shipping message	New Order Template
{{logo_height}}	Email Logo Image Height	Header
{{template_styles}}	Template CSS	Header
{{url_about_us}}	About Us URL	Footer
{{url_customer_service}}	Customer Service URL	Footer
{{store_hours}}	Store Hours	Footer
{{order_email_lead_in}}	-	New Order Template

Figure 8: Unused Variables Displayed on Test Data Set Preview

The template being used for the preview above contains a reference to the “order_email_lead_in” variable:

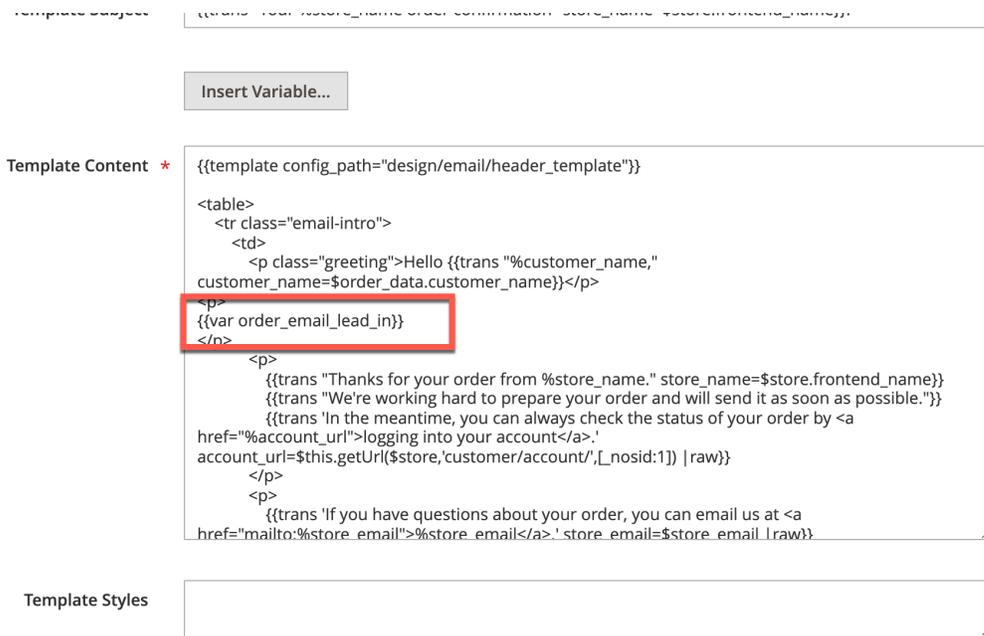


Figure 9: Non-OOTB Variable Being Used in Email Template

For the example above, we’ll add a new custom data field with the name “order_email_lead_in” and a sample value (NOTE: do not include the curly braces when entering the field name):

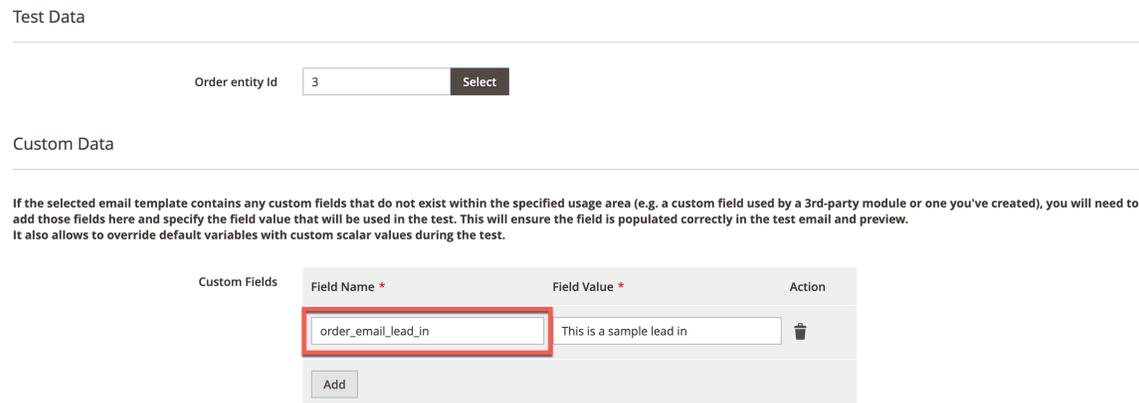


Figure 10: Specifying a Custom Data Field for a Test Data Set

After adding the custom data field, the preview will show the entered value in the context of the email body:

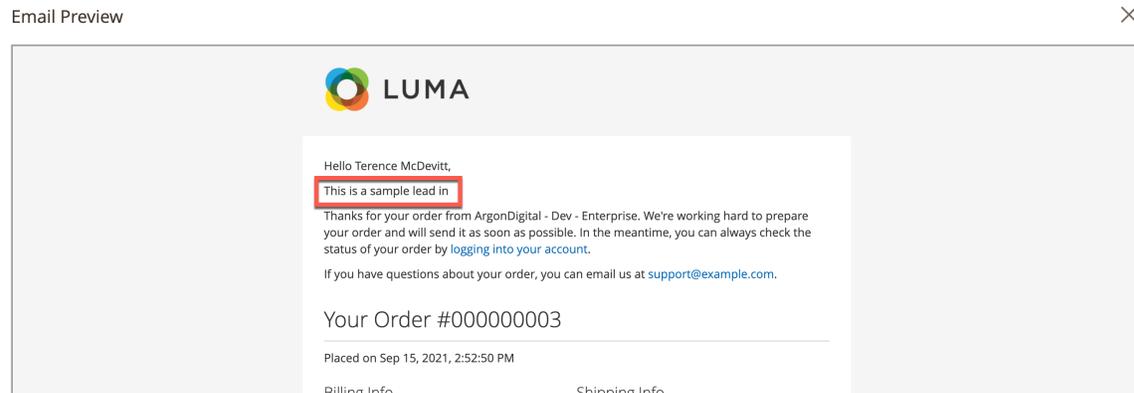


Figure 11: Custom Data Field Being Rendered in Email Preview

A few notes about custom data fields:

- In the table below the preview, we show all variables that have been read from the template *and* any additional templates that may be included in the main template. An example of this would be the header and footer templates.
- In the same table, we show a label for the variable, if it's defined in Magento. Additionally, we show the name of the template where the variable is being used.
- If you've already specified a custom data field for a variable, that variable will not be shown in the table below the preview.
- If you copy a test, any custom data fields that you've configured will also be copied into the new test.

Add new test data set

1. From an existing email test, expand the **Test Data Sets** section.
2. Enter a **Test Data Set Name** for the data set.
3. Set Is test active?
4. Select a value for Send test on behalf of Store View.
5. Under **Test Data**, click **Select** to look-up and select any required entities needed to populate the email template variables. (e.g., customer, order #, etc.)
6. Under **Custom Data**, click **Add** to specify any custom data fields needed by the selected email template.
7. Click the **Preview** button to confirm your test data set is complete for the email test.
8. When complete, click Save.

Edit test data set

From an existing email test, expand the **Test Data Sets** section and click “Edit” in the Action column.

In the test data form, choose the information you need to edit and make the necessary changes. When complete, click Save.

RUNNING TESTS

There are several ways to run transactional email tests once they've been fully configured.

Directly from a Transactional Email Test

The header of the transactional email edit details screen contains a “Run Test” button. Clicking this will send the configured email using all active test data sets for the test.

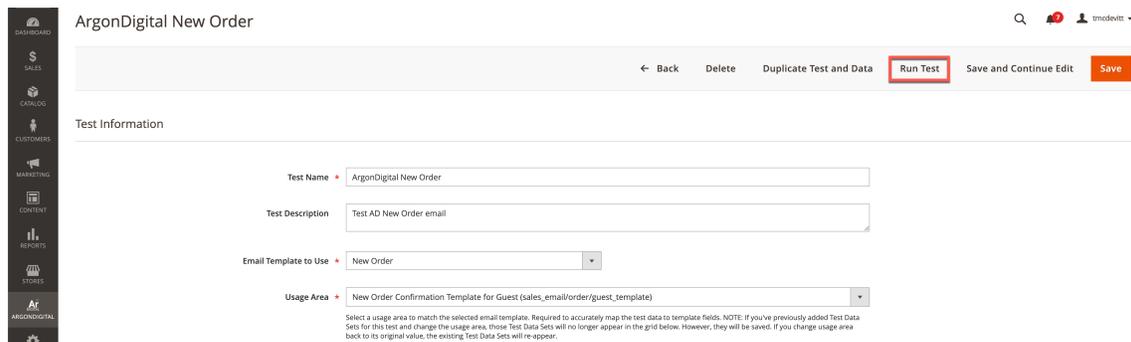


Figure 12: Running Transactional Email Test from Within the Test

From the Transactional Email Tests Grid

Multiple transactional email tests can be executed at the same time from the tests grid. Simply select one or more test and choose “Run Selected Tests” from the “Actions” dropdown. This action will use each configured, active test data set for each of the selected tests.

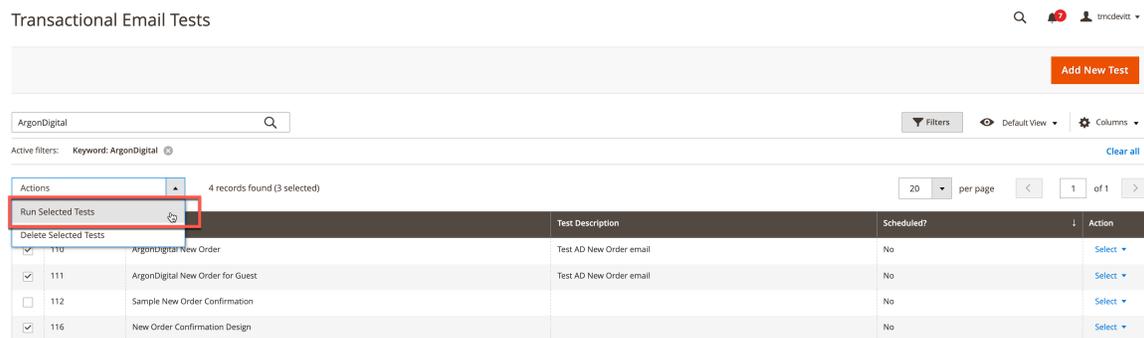


Figure 13: Running Transactional Email Tests from the Transactional Email Tests grid (batch)

Individual tests can also be executed directly from the grid by choosing “Run Test” from the action dropdown on the right-hand side of the grid.

Transactional Email Tests

ArgonDigital

Active filters: Keyword: ArgonDigital

4 records found

ID	Test Name	Test Description	Scheduled?	Action
110	ArgonDigital New Order	Test AD New Order email	No	Select Edit Delete Run Test Duplicate
111	ArgonDigital New Order for Guest	Test AD New Order email	No	
112	Sample New Order Confirmation		No	
116	New Order Confirmation Design		No	

Figure 14: Running Transactional Email Tests from the Transactional Email Tests grid (individually)

From the Out-of-the-box Magento Email Template Editor

When editing a custom email template from Magento's OOTB template editor, it can be very helpful to execute the tests during the editing process so changes can be quickly reviewed/tweaked. The Transactional Email Tester module provides all tests currently configured for the selected email template at the bottom of the editor screen. Tests can be executed in the same manner described above (in batch or individually).

ArgonDigital New Order

Template Subject: `{{(trans "Your %store_name order confirmation" store_name=$store.frontend_name)}}`

Template Content: `<table border="1">
<tr>
<td colspan="2" style="background-color:red">Lead times in the filtration industry are currently longer than normal. If you know your needs for the next few months, we recommend placing those orders now to ensure timely delivery.</td>
</tr>
</table>
<table>
<tr>
<td colspan="2"></td>
</tr>
</table>
<tr class="email-intro">
<td>
<p class="greeting">{{(trans "%customer_name", customer_name=$order_data.customer_name)}}</p>
<p>{{(trans "Thank you for your order from %store_name", store_name=$store.frontend_name)}}</p>
<p>{{(trans "Once your package ships we will send you a tracking number.")}}</p>
<p>{{(trans "You can check the status of your order by sa track-%account_url->logging into your account." account_url=$this.escapeUrl($store->customer/account/?_nosid=1)}}</p>
</td>
</tr>
</table>`

Template Styles

Configured Tests for this Email Template

These are the tests that are currently configured to use this email template. If you'd like to add new tests, click [here](#)

1 records found

ID	Test Name	Test Description	Scheduled?	Action
112	Sample New Order Confirmation		No	Select Edit Delete Run Test

Figure 15: Running Transactional Email Tests from the Magento email template editor

Something worth noting as you build out/test custom email templates in Magento. There's a maximum content length on email templates that's dictated by the database (in MySQL, the max length is 65k characters, but this could differ depending on which database you're using). If you run up against this limit, you'll be unable to save the

template. If this happens, we'd suggest breaking up your email into separate templates and then referencing those templates from the primary email template. You can also try to move inline CSS styling, if any, out of the main "Template Content" and into the "Template Styles" section to avoid hitting the character length limit.

LOGGING

The Transactional Email Tests Logs grid lists all transactional email tests that have been executed (manually or on a scheduled basis). Use the standard grid controls to filter the list and make any adjustments to the columns.

Columns

Column	Description
ID	A unique numeric identifier that is assigned when the test is executed.
Test ID	A unique numeric identifier that is assigned when the test is created.
Test Data ID	A unique numeric identifier that is assigned when the test data is created.
Status	Indicates the status of the test execution.
Message	Indicates the outcome of the email execution.
Email address(es)	Indicates the email address(es) the test email was sent to.
Email Template	Indicates the template used to create the test email.
Sent By (cron/manually)	Indicates if the email was executed via cron or manually.
Sent At	Indicates the time the test email was sent.
Action	View - Opens the test in detail page.