

## 2. Ultimate Follow Up Email And SMS User Guides

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via our email address below.

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## Introduction

Magento 2 Follow Up Emails extension for Magento 2 is a powerful extension which allows you to keep a healthy interaction with your customers. You will be able to create flexible rules for both follow up emails and SMS to send them to your customers. This plays an important role to create successful and effective marketing campaigns. Thus, it will help to improve and boost sales for your business as well as getting closer to your customers.

### How to create an email and SMS to send customers?

At Magento 2 back end, we created many available events such as Abandoned Cart, Customer Birthday, Customer Registration, Order Is Placed, Order Obtained Status Pending Payment and more in Ultimate Follow Up Email extension. You only choose events that they want to create and set them by entering some fields such as the content

email, the content SMS, time to send emails/SMS and so on. Then, they will automatically send to customers. This is really useful and convenient for the business because the owner store can easily control contents sent and choose the best time to send your email marketing campaigns.

Especially, for the most common events are Abandoned Cart and Customer Birthday, we will provide great features in this extension.

## How to send an follow-up email and SMS?

Do you wonder how to send an automatic follow up email/SMS to customers ?

It is very simple. When customers interact with the events created, the system will automatically send follow up email or SMS to customers.

### Email

One of the problems that most of the stores are facing now is emails sent automatically from their system to customers sometimes be recognized as spam and customers almost forget about them. It is definitely a regret, which effects considerably to your business situation. However, you do not need to worry, we have examined this problem and find out a solution. By allowing connection with [Mail Chimp](#), it will limit the risk that mails being recognized as spam to a minimum. And this will result in the higher possibility that your automatic emails will be sent directly to the customer's inbox and got more concern from them.

### SMS

If you think these above features are amazingly wonderful, you will truly be impressed by a fact that this system allow you to send directly SMS to your customers by integrating with [Nexmo](#). The system will allow you to send SMS to customers after they place order, register an account or subscribe newsletter.

What is [Nexmo](#)?

Nexmo offers a global SMS API which allows you to send messages to all but four countries and receive inbound messages via virtual numbers in twenty eight countries. It helps your business:

- + More security, lower latency.
- + Better delivery rates.
- + Free inbound SMS.

Nowadays, most people have owned at least a smartphone. It's definitely amazing when your messages can be sent directly to the customer's phone. And we say for sure that Ultimate Follow Up Emails is all you need, and indeed it's really more than you desire.

The following is all of things you need to use our Ultimate Follow UP Email and SMS Extension.



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## Feature list

- Send follow up email on customer behaviors
- Send emails on special events - 3 default events
- Send SMS on customer behaviors
- Smart cart recovery
- Integrate with Mandrill - Avoid spam folder
- Integrate with Nexmo - Follow up SMS

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## System Requirements

Your store should be running on Magento Edition version 2.x.x.

# Configuration

## General Configuration

### General

+ Go to Store > Configuration > Magenest > Ultimate Follow Up Emails.

The screenshot shows the Magento Configuration interface. On the left is a sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Magenest Follow Up Emails, Stores, System, and Find Partners & Extensions. The main content area is titled 'Configuration' and shows 'Store View: Default Config'. Below this is a list of configuration categories: GENERAL, CATALOG, MAGENEST, CUSTOMERS, SALES, SERVICES, and ADVANCED. The 'MAGENEST' category is expanded to show 'Ultimate Follow Up Emails'. To the right of this list are five configuration items, each with a red circle containing a number: 1. General, 2. Abandoned cart reminder, 3. Mandrill integration, 4. NexMo Integration, and 5. Mobile number of customer. The footer contains the copyright notice: 'Copyright © 2017 Magento, Inc. All rights reserved.'

+ Set the following fields:

- Email Sender.
- BBC name.
- BBC email.

### Abandoned cart reminder

+ Time to be consider as abandoned cart: Set the time after that the cart is consider as abandoned.

### Mandrill Integration

- Enable: Set the status of Mandrill Integration.
- API key: Enter the API key for Mandrill Integration.



Store View: Default Config ▾



GENERAL ▾

CATALOG ▾

MAGENEST ▲

Ultimate Follow Up Emails

CUSTOMERS ▾

SALES ▾

SERVICES ▾

ADVANCED ▾

## General

Email Sender  [WEBS]

BCC name  [WEBS]

BCC email  [WEBS]

## Abandoned cart reminder

Time to be consider as abandoned cart  [WEBS]

Default is 60 minutes

## Mandrill integration

Enable  [WEBS]

Enable this option will make module sending abandoned cart email reminder via Mandrill

API key  [WEBS]

Configuration

Store View: Default Config

GENERAL

CATALOG

MAGENESE

Ultimate Follow Up Emails

CUSTOMERS

SALES

SERVICES

ADVANCED

General

Abandoned cart reminder

Mandrill integration

NexMo Integration

Enable [global] No  
Enable this option allows sending message via Nexmo

API key [global]

API Secret [global]

From [global]

Mobile number of customer

Allow mobile field input in customer register form [global] Yes  
If you choose yes, there is a mobile input field in customer's registration form

Make mobile is required field [global] Yes  
If you choose yes the mobile input is required field

## Integrate with MailChimp

- + Enable: set the status for this integration.
- + API key: Enter the API key to use.

To get the API key, you need to have a MailChimp account. If you don't have, please click on this link: <http://mailchimp.com/>.

⚠ Note: You can choose where email which is sent, from your website or Mandrill.

## Mandrill integration

**Enable**  [WEBSITE]

Enable this option will make module sending abandoned cart email reminder via Mandrill

**API key**  [WEBSITE]

**Account information** User Name  [STORE VIEW]  
Reputation   
Hourly Quota   
Backlog

## Mobile number of customer

**+** Make mobile number of customer:

- Yes: If you choose Yes the mobile input is required field.
- No: If you choose No the mobile input is not required field although this field can remains displayed.

**+** Allow mobile field input in customer register form:

- Yes: If you choose yes, there is a mobile input field in customer's registration form.
- No: If you choose no, there is not a mobile input field in customer's registration form.

### Mobile number of customer

Make mobile is required field

[WEBS

If you choose yes the mobile input is required field

Allow mobile field input in customer register form

[WEBS

If you choose yes, there is a mobile input field in customer's registration form

### NexMo Integration

Enable

[WEBS

Enable this option allows sending message via Nexmo

API key

[WEBS

API Secret

[WEBS

From

[WEBS

### Personal Information

First Name \*

Last Name \*

Email \*

Sign Up for Newsletter

### Sign-in Information

Password \*

Confirm Password \*

### Additional Information

Mobile \*

Make mobile is required field

If you choose yes the mobile input is

Allow mobile field input in customer register form

If you choose yes, there is a mob customer's registration form

Create an Account

## NexMo Integration

NexMo has been integrated so that the customer can send an sms to customers' phone.

- + Enable: choose Yes to enable this option.
- + API key: Nexmo API Key.
- + API secret: Nexmo API Secret key.

### NexMo Integration

<b>Enable</b>	<input type="text" value="No"/>	[WEBSITE]
	Enable this option allows sending message via Nexmo	
<b>API key</b>	<input type="text"/>	[WEBSITE]
<b>API Secret</b>	<input type="text"/>	[WEBSITE]
<b>From</b>	<input type="text"/>	[WEBSITE]

## Setting Up Rules

We created a Ultimate Follow Up Emails menu which allows you to set and manage email and sms.

- + Firstly, set rules related to the email type which suits their business strategy such as abandoned cart, customer birthday and so on, by clicking on Magenest FollowUp Email > Trigger Rules.

**Follow Up Emails And SMS**

Setting      Reports

Trigger Rules      Abandoned Cart Charts

Configuration      Email Campaign Charts

Email Templates

Records

Mall Logs

Sms Logs

Abandoned Carts

Customer Birthdays

Unsubscribers

Revenue: **\$0.00**      Tax: **\$0.00**      Shipping: **\$0.00**      Quantity: **0**

Bestsellers   Most Viewed Products   New Customers   Customers

We couldn't find any records.

+ At Rule screen, you can manage the entire existing rules such as the number of created rules, rule status and so on.

+ To create a new rule, click on New Rule button.

Rule 🔍

+ Then, select an event to send follow-up emails.

**+** Event types:

Event Title	Event Description
<b>Abandoned Cart</b>	
Abandoned Cart	This event allows sending email reminders to the customers who added any amount of products to their shopping cart and for some reason left the store without a purchase.
<b>Customer</b>	
Customer Registration	Send emails to customers when they created an account at the store
Customer Birthday	Send birthday greetings to the store customers
<b>Newsletter Subscribe</b>	
Customer Subscribe	Send emails to customers when they subscribed to the Newsletter
Customer Unsubscribe	This event cancels the subsequent notifications in case a customer clicks the unsubscribe link
<b>Wishlist</b>	
Wishlist Item Reminder	Send emails to remind customers about their wish list
Wishlist Item Back in Stock	Send emails to customers when items in their wish list back in stock
Wishlist Item On Sales	Send emails to customers When items in their wish list on sales

**+** Click on **Save** button to continue the next step.

## Rule Information

+ Enter the general information include Rule Name, Status, Active From-To, Websites and Customer Groups.

### Rule

FOLLOW UP EMAIL RULE

- Rule Information
- Condition
- Email Chain
- SMS
- Google Analytics
- Coupon

#### General Information

customer\_birthday

#### Basic Information

Rule Name \*

Description

Status \*

Websites \*

Customer Groups \*   
General  
Wholesale  
Retailer

From

To

## Condition

+ Go to Magenest FollowUp Email > Trigger Rules and open a rule and click the Conditions tab.

+ Setting up rules allows you to set additional conditions based on customer details, who will receive certain emails.

+ You can use Customer, Shopping Cart, Order, Shipping Address, Wishlist conditions.

## Email Chain

- + In this section you can add email instances that would be sent to a customer when the rule gets triggered. Remember you must add at least 1 email when creating a rule.
- + To add new email to mail chain, follow these steps:
  - Go to Marketing > Communications > Email Template and open the rule.
  - Press Add New Template.
- + Template Name, Template Subject and Template Content fields will be taken from the template and processed with the filter. The Sender Name and Sender Email fields are ignored by the extension, it uses the values specified in the Configuration (Gmail Account).
- + You can insert variables in email template and preview email after editing.

← Back
Reset
Convert to Plain Text
Preview Template

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

MAGENEST FOLLOWUP EMAILS

REPORTS

STORES

SYSTEM

### Load default template

Template

### Template Information

Template Name \*

Template Subject \*

Template Content \*

+ Then go to Magenest FollowUp Email > Rule, follow Email Chain Tab.

- Select when the triggered message will be sent.

By default, it will send immediately after a triggering event (0 days 0 hours 0 minutes). You can choose set times from as short as one minute to as long as few years after the trigger's criteria is met.

- Select Email Template, which will be sent.
- You can attach one or more files into email in order to send customers.

## Rule

← E

#### FOLLOW UP EMAIL RULE

Rule Information

Conditions

Email Chain

SMS

Google Analytics

Coupon

#### General Information

Files extension allowed: .jpg, .jpeg, .gif, .png, .pdf, .doc, .docx, .txt

20150521tdmslidedoc  
160627095514.pdf

Browse to find or drag files here

Email Template	Day	Hour	Min
<input type="button" value="Add email in chain"/>			

## SMS

- + Message Content: The message you want to send to customers
- + Day, hour, minute: Set sending time exactly by day, hour and minute
- ! Note: You can set more than one SMS for a rule to send customers.

Message Content	Day	Hour	Minute
Dear Sir Thank you for registration.Please reply to confirm you want to	0	0	5
Dear Sir You first appointment start at August 28	0	0	0

## Google Analytics

- + Go to Magenest FollowUp Email > Rule, open rule and follow tab Google Analytics.
- + Fill in the required fields:
  - Campaign Source - Identifies a search engine, newsletter name, or other source.(i.e. email, follow-up-email, newsletter)
  - Campaign Medium - Identifies a medium such as email or cost-per-click. (i.e. cpc, banner, email).
  - Campaign Name - Identifies a specific product promotion or strategic campaign. (i.e product, promo code, or slogan). Also, you can optionally fill in other fields:
  - Campaign Term - Identifies paid keywords.
  - Campaign Content - Differentiates ads or links that point to the same URL.
- + Save the trigger.

Rule
🔍

← Back

**FOLLOW UP EMAIL RULE**

Rule Information

Conditions

Email Chain

Google Analytics 4

Coupon

### General Information

---

### Google Analytics Campaign

---

**Campaign Source**

Google analytics Source

**Campaign Medium**

Google analytics medium

**Campaign Name**

Google analytics name

**Campaign Term**

Google analytics name

**Campaign Content**

Google analytics name

➕ After configuring Google Analytics Campaign, extension will automatically add special get params to all links in email. Thus, you don't need to do additional configuration adjustments. (i.e. url <http://example.com/about-us/> will be converted to <http://example.com/about-us/?utm-source=email&utm-medium=trigger-email&utm-name=review-request>).

➕ To track Google Analytics Campaign log in into your Google account and go to Traffic Sources > Campaigns. Select campaign source from the list.

## Coupon

➕ To create Coupon, go to Marketing > Cart Price Rules.

➕ Then, navigate to Magenest FollowUp Email > Trigger Rules, follow Coupons Tab.

➕ In the Coupon section of extension you can search your cart price rule by type 3 characters for search auto complete. The extension will show 3 nearest results for you. Enter the promotion coupon you want for rule.

**Edit Rule** ← Back Delete

**RULE INFORMATION**

- Condition
- Email Chain
- SMS
- Google Analytics
- Coupon** 5

**Select promotion rule to insert coupon .**

---

Enable coupon  Yes  No

Select a promotion rule ( Typing 3 character for auto-complete )

1 result is available, use up and down arrow keys to navigate.

[10\\$ for customer registration](#)

+ In addition, you can set time available for the coupon. This coupon is active right after sending follow up email.

**Edit Rule** ← Back Delete

**FOLLOW UP EMAIL RULE**

- Rule Information
- Conditions
- Email Chain
- SMS
- Google Analytics
- Coupon**

**General Information**

---

Type

**Select promotion rule to insert coupon .**

---

Enable coupon  Yes  No

Coupon Available For: ( After an amount of time, user can not use coupon code generated by followup email )

<input style="width: 95%;" type="text"/>	Day(s)	<input style="width: 95%;" type="text"/>	Hour(s)	<input style="width: 95%;" type="text" value="30"/>
--	--------	--	---------	---

Select a promotion rule ( Typing 3 character for auto-complete )

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## Mail Log

- + Go to Magenest FollowUp Email > Mail Logs.
- + In the mail log grid, you can view any of the currently scheduled, already sent, failed and cancelled emails. The grid shows the status, created at/ sent at time stamps, rule details (rule ID, rule name) and recipient details (email address).
- + You can delete or change the status of the emails.

The screenshot displays the 'Mail log' interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, and Stores. The main area features a search bar with 'Search' and 'Reset Filter' buttons, and a filter dropdown set to 'Actions'. Below this, it indicates '4 records found' and a pagination control set to '20 per page'. The main content is a table with the following data:

<input type="checkbox"/>	ID	Status	Rule ID	Recipient Name	Recipient Email	Send At	Created at	Action
<input type="checkbox"/>	1	sent	1	Ron Plance	ronplance@gmail.com	Jun 6, 2016, 2:04:13 AM	Jun 6, 2016, 2:04:33 AM	<input type="text"/>
<input type="checkbox"/>	2	sent	2	Ron Plance	ronplance@gmail.com	Jun 6, 2016, 3:30:01 AM	Jun 6, 2016, 3:29:02 AM	<input type="text"/>
<input type="checkbox"/>	3	sent	1	Rony Plance	ronyplance@gmail.com	Jun 6, 2016, 5:34:05 AM	Jun 6, 2016, 5:36:26 AM	<input type="text"/>
<input type="checkbox"/>	4	sent	1	Ron Plance	ronplance@gmail.com	Jun 6, 2016, 5:39:25 AM	Jun 6, 2016, 5:39:06 AM	<input type="text"/>

- + You can also apply certain actions to any of the queue items - Preview, Cancel and Send Now (the latter sends the selected email(s) instantly, disregarding their schedule or status)

## SMS Log

- + Go to Magenest FollowUp Email > Sms Logs.
- + In the Sms log screen, you can view and manage all of things related sms, including: ID, status( queued, sent, failed, cancelled), Rule ID, Recipient Name, Recipient Mobile, Send At and Created At.
- + Furthermore, the store owner also can send a manual email by selecting Send now or cancel it.

## SMS log



Search

Reset Filter

10 records found

20



per page



ID	Status	Rule ID	Recipient Name	Recipient Mobile	Send At	Created at
From	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	From	From
To	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	To	To
15	queued	1	Hung Nguyen	0985986898	Jun 27, 2016 2:17:33 AM	Jun 27, 2016 2:14:14 AM
16	queued	1	Hung Nguyen	0985986898	Jun 27, 2016 2:14:31 AM	Jun 27, 2016 2:14:31 AM
17	queued	1	Hung Nguyen	0985986898	Jun 28, 2016 4:17:32 AM	Jun 27, 2016 2:14:32 AM
18	queued	1	Hung Nguyen	0985986898	Jun 27, 2016 4:12:01 AM	Jun 27, 2016 4:07:01 AM
19	cancelled	1	Hung Nguyen	0985986898	Jun 27, 2016 4:07:01 AM	Jun 27, 2016 4:07:01 AM
20	sent	1	Hung Nguyen	0985986898	Jun 28, 2016 6:10:01 AM	Jun 27, 2016 4:07:01 AM

## Abandoned Cart List

- + Go to Magenest FollowUp Email > Abandoned Carts.
- + Manage your customers' abandoned carts in this section, including:
  - Customer Email.
  - Customer First Name.
  - Customer Last Name.
  - Update At.
  - Email Status.

## Abandoned Cart List

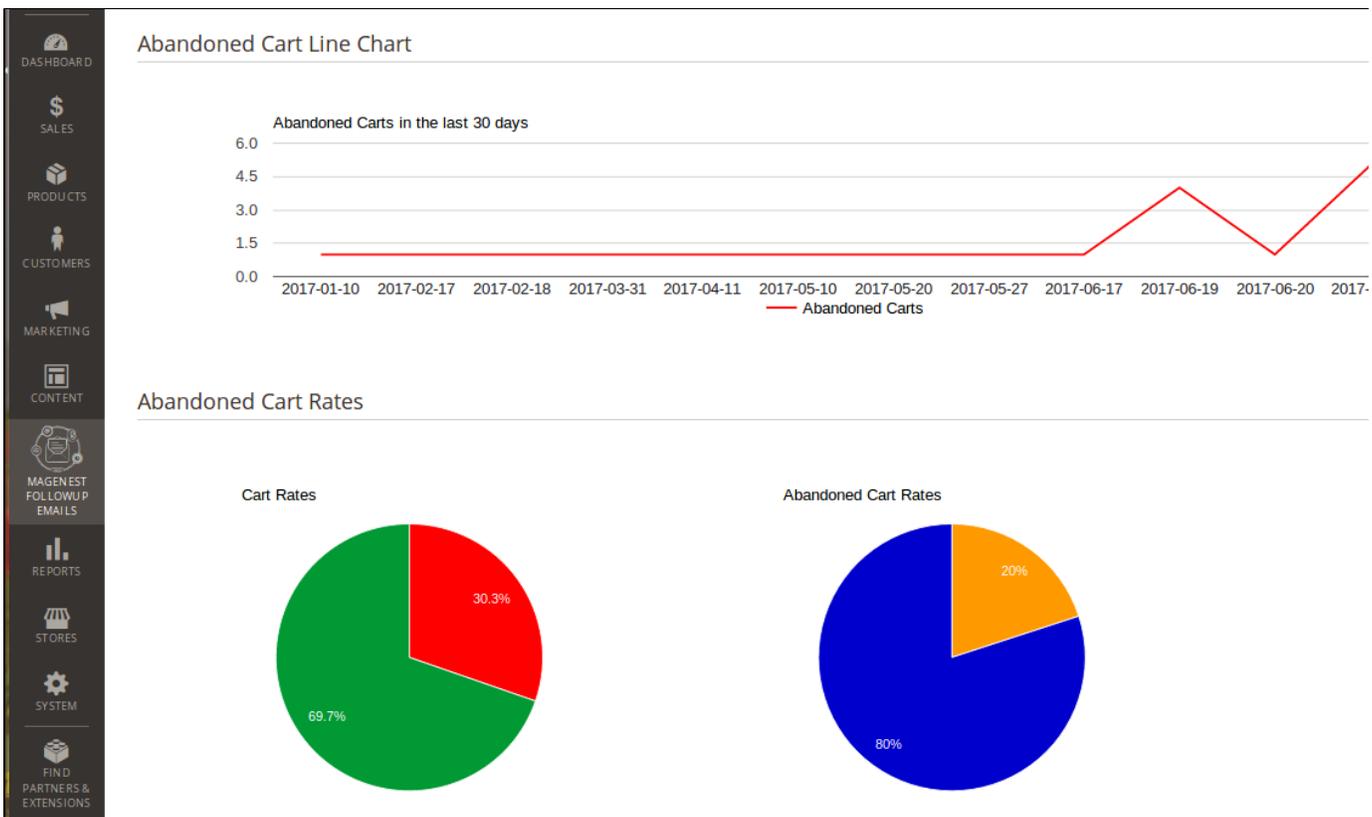
Search [Reset Filter](#) 3 records found 20 per page

ID	Customer Email	Customer First Name	Customer last name	Update At
From				
To				
1	ronplance@gmail.com	Ron	Plance	2016-06-06 09:17:09
2	ronyplance@gmail.com	Rony	Plance	2016-06-06 10:33:05
3	ronplance@gmail.com	Ron	Plance	2016-06-06 10:38:25

## Abandoned Cart Charts

+ Go to Magenest FollowUp Email > Abandoned Cart Charts.

+ This section is divided into 2 parts: Abandoned Cart Line Chart and Abandoned Cart Rates which are really helpful for catching the behavior of customers by statistics.



## Customer Event Collect

The sample event in here is birthday.

+ Go to Magenest FollowUp Email > Customer Birthdays.

+ Collect your customers' date of birth in this section. Especially, our extension allow you to search by month, date. This will help the store owner search as well as manage an easy way.

**Birthday Search**

mm-dd

**Search** [Reset Filter](#) 3 records found 20 per page

ID	Email	LastName	Dob	Is Active	Website
1	roni_cost@example.com	Costello	Jun 20, 1963	Active	1
2	ronplance@gmail.com	Plance	Jun 30, 1998	Active	1
3	ronyplance@gmail.com	Plance	Jun 20, 1979	Active	1

## Email Campaign Charts

+ Go to Magenest FollowUp Email > Email Campaign Charts

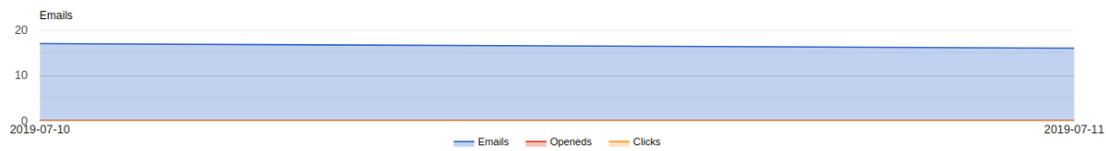
+ This section is divided into 2 parts: Emails Line Chart and Emails Opening Rates and Clicking Rates which are really helpful for catching the behavior of customers by statistics.

## Email Campaign Reports

Reports for specific dates:

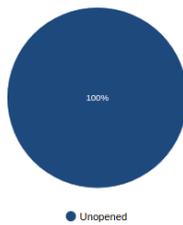
From:  To:

### Emails Line Chart

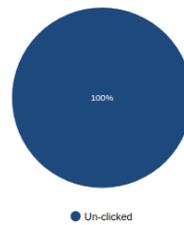


### Emails Opening Rates and Clicking Rates

Opening Rates



Clicking Rates



## Sample Email Template

### Abandoned carts reminder

#### Sample email template of abandoned cart reminder

```
Dear {{var customerName}}  
<br>  
We notice you have abandoned cart  
<br>  
{{var cart}}  
  
<br>  
  
Please click <a href="{{var resumeLink}}" > Resume Cart </a> to complete  
the order.  
  
<br>  
We gift you a coupon with code {{var coupon.code}}  
<br>
```

### Event email template

## Happy birthday email template of follow up email

Dear {{var customerName}}

Happy birthday .

We gift a coupon \$50 {{var coupon.code}}

Thank you

## Integration with Mandrill to send email

### Sample Email

- + The following is an abandoned cart email that they received when customers added items into their cart but they did not check out.
- + All of things in this email such as the email content, attached files are set when admin created the abandoned cart rule at back end.



Dear David,

Your shopping cart misses you.

We saw that you were about to pick up some goods in the shop and that you didn't get a chance to finish your order. I just wanted to see if there were any problems, or anything at all I could help with. If so, please let me know by responding to this email. In case you were looking to pick up where you left off, here's a reminder of what you were thinking about getting:

- Selene Yoga Hoodie.
- Breathe-Easy Tank.

Here is link to your shopping cart:

<http://fue.demo.izysync.com/women.html>

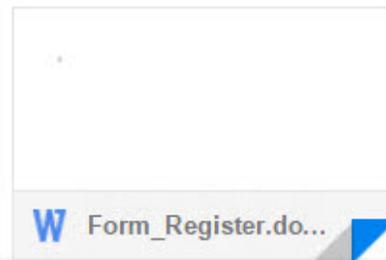
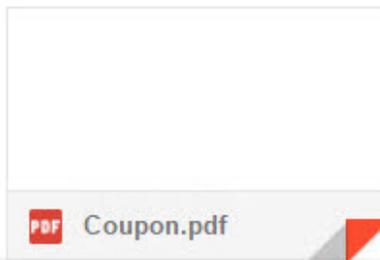
Especially, we sent a coupon and a register form so that you can received more information from us in attached files.

Thanks again for visiting Magenest JSC, and please let me know if you have thoughts on how we can improve your experience at Magenest JSC.

Best wishes!

Magenest JSC

### 3 Attachments



### Integration with Nexmo to send SMS

- + This is great feature that we brings for you in this extension. Besides sending emails, you can directly send SMS to customers' mobile.
- + When a customer creates a new account, they will be required to enter their mobile if the owner store want to use this feature.
- ⚠ Note: the customer need to enter their exact phone because the system will send an sms to this phone.

Personal Information

First Name \*

Last Name \*

Email \*

Sign Up for Newsletter

Sign-in Information

Password \*

Confirm Password \*

Additional Information

Mobile \*

Make mobile is required field   
If you choose yes the mobile input is

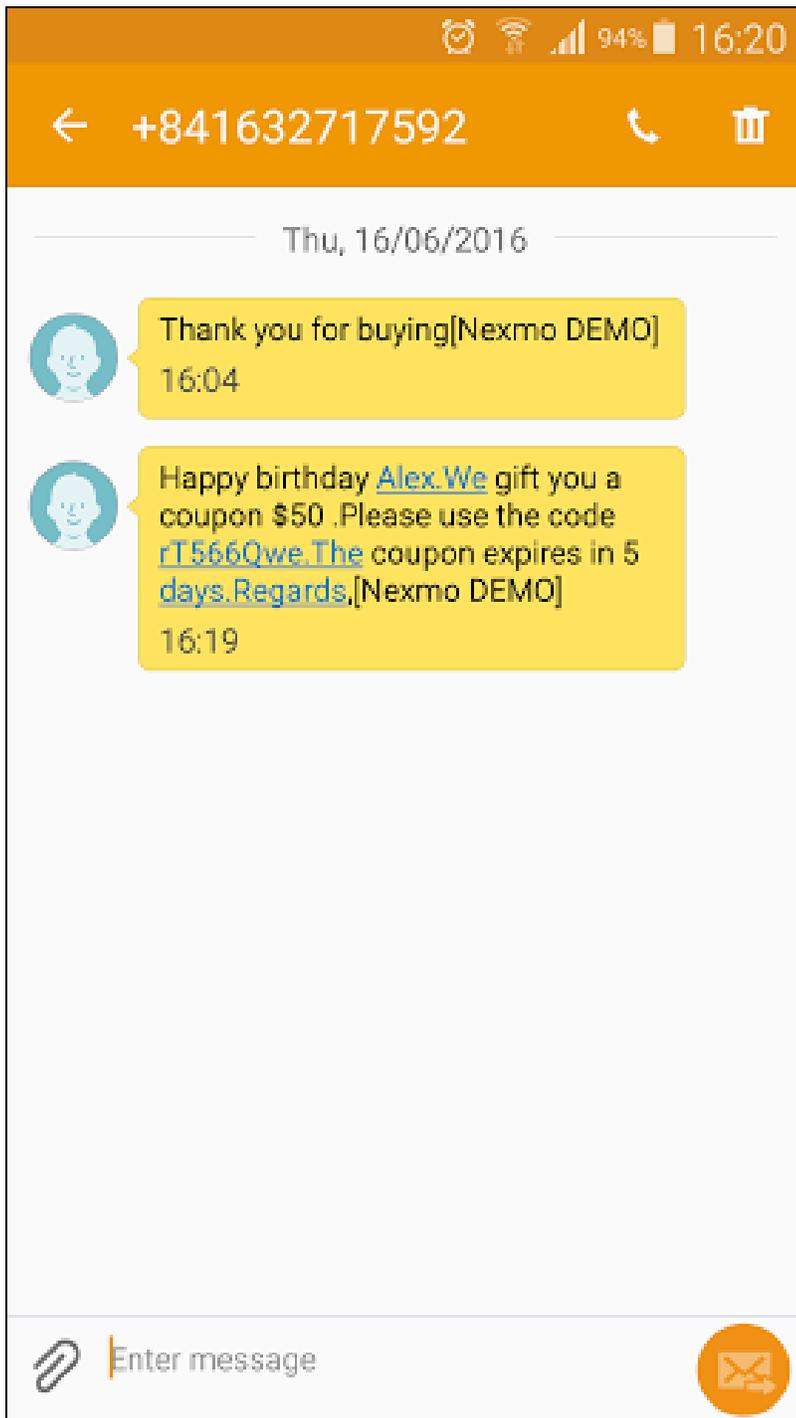
Allow mobile field input in customer register form   
If you choose yes, there is a mob customer's registration form

## Sample SMS

The following is an sms which is sent to customer.

As you can see the screen that we captured here. It is no doubt that customers will feel very happy when they received meaningful wishes in their birthday.

This is really useful and fantastic tool to get closer to your customers.



---

## Update

- When a bug fix or new feature is released, we will provide you with the module's new package.
  - All you need to do is repeating the above installing steps and uploading the package onto your store. The code will automatically override.
  - Flush the config cache. Your store and newly installed module should be working as expected.
-

# Support

- We will reply to support requests within 2 business days.
- We will offer lifetime free update and 6 months free support for all of our paid products. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support DOES NOT include other series such as customizing our products, installation and uninstallation service.

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Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.