

Birthday Coupon for Magento 1 User Guide

Introduction

There are several ways to improve your clients' loyalty. One of the best is a discount. With Birthday Coupon extension you can automatically send discounts to birthday persons giving them a great reason to return to your store.

Specify the exact period when the coupon should be sent along with discount amount and expire date and the coupon is ready. With this extension you will show your clients how you care about them.

There is also [Birthday Coupon for Magento 2](#) in our store.

Magento Compatibility:

Community Edition: 1.8.x, 1.9.x

Enterprise Edition: 1.13.x, 1.14.x.1.x

If you experience any issues with the installation, please contact us.

Installation

To install NEKLO extension for Magento 1, you need to have FTP/SSH access details.
Attention! It is vital to disable code compilation before installing the extension. If this setting is left enabled, the extension installation can make your site inaccessible.

To disable code compilation, go to your **admin panel > System > Tools > Compilation** and click "Disable"

This is a demo store. Any orders placed through this store will not be honored or fulfilled.

Magento Admin Panel Global Record Search Logged in as admin | Thursday, April 5, 2018 | Log Out

Dashboard Sales Catalog Customers Promotions Newsletter CMS Reports **System** Get help for this page

Compilation [Run Compilation Process](#)

Compilation State

Compiler Status	Disabled
Compilation State	Not Compiled
Collected Files Count	0
Compiled Scopes Count	0
Scopes Compilation Settings	<p>default</p> <ul style="list-style-type: none"> Mage_CatalogSearch_Helper_Data Mage_Catalog_Block_Navigation Mage_Catalog_Block_Product_Abstract Mage_Catalog_Helper_Data Mage_Catalog_Helper_Map Mage_Catalog_Helper_Product_Compare Mage_Catalog_Model_Abstract Mage_Catalog_Model_Category Mage_Catalog_Model_Session Mage_Checkout_Block_Cart_Abstract Mage_Checkout_Block_Cart_Sidebar Mage_Checkout_Block_Links Mage_Checkout_Helper_Cart <p>cms</p> <ul style="list-style-type: none"> Mage_Page_Helper_Data

My Account
Notifications
Tools
Web Services
Design
Import/Export
Manage Currency
Transactional Emails
Custom Variables
Permissions
Magento Connect
Cache Management
Neklo CachePro
Index Management
Manage Stores
Order Statuses
Configuration

To Install the Extension:

1. Unpack a zip file you have downloaded.
2. Upload all files from the the zip file to the root folder of your Magento 1 installation.
3. In your admin panel, go to **System > Cache Management** and flush Magento cache.

This is a demo store. Any orders placed through this store will not be honored or fulfilled.

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Cache Storage Management [Flush Magento Cache](#) [Flush Cache Storage](#)

Select All | Unselect All | Select Visible | Unselect Visible | 8 items selected Actions Refresh Submit

Cache Type	Description	Associated Tags	Status
<input checked="" type="checkbox"/> Configuration	System(config.xml, local.xml) and modules configuration files(config.xml).	CONFIG	ENABLED
<input checked="" type="checkbox"/> Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	ENABLED
<input checked="" type="checkbox"/> Blocks HTML output	Page blocks HTML.	BLOCK_HTML	ENABLED
<input checked="" type="checkbox"/> Translations	Translation files.	TRANSLATE	ENABLED
<input checked="" type="checkbox"/> Collections Data	Collection data files.	COLLECTION_DATA	ENABLED
<input checked="" type="checkbox"/> EAV types and attributes	Entity types declaration cache.	EAV	ENABLED
<input checked="" type="checkbox"/> Web Services Configuration	Web Services definition files (api.xml).	CONFIG_API	ENABLED
<input checked="" type="checkbox"/> Web Services Configuration	Web Services definition files (api2.xml).	CONFIG_API2	ENABLED

- Turn code compilation back on in **System > Tools > Compilation** after the extension was successfully installed.
- Log out from Magento and login to reload ACL (account control level) rules.

Setting the coupon rules

At first you should set the new price rules for this extension. For this go to **Promotions** → **Shopping Cart Price Rules** and create auto generated price rules. Two options must be set:

- Coupon** should be **Specific Coupon**
- In **Coupon Code** the **Use Auto Generation** must be on.

The rest is up to you.

Configuring the extension

To see the configurations of this extension, open **Admin Panel** and go to **System** → **Configuration** → **Neklo** → **Birthday Discount Coupon** → **General Settings**. Here you can adjust the extension:

- Is Enabled** turns the extension on and off.
- Associated sales regulates** the rules of the coupon. Set here the rules you have just created in **Promotions** → **Shopping Cart Price Rules**.
- Send email X days before birthday** sets the amount of days before the birthday, when the coupon will be sent. A negative number means the email will be sent after the birthday date

The screenshot shows the Magento Admin Panel interface. At the top, there is a navigation bar with the Magento logo, 'Admin Panel', a search bar, and user information: 'Logged in as admin | Friday, June 29, 2018 | Log Out'. Below the navigation bar is a menu with tabs for Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System (which is currently selected). A 'Get help for this page' link is also present.

The main content area is titled 'Birthday Discount Coupon' and includes a 'Save Config' button. The 'General Settings' section is expanded, showing the following configuration options:

Setting	Value	Scope
Is Enabled	Yes	[STORE VIEW]
Associated sales rule	Birthday Discount	[STORE VIEW]
Send email X days before birthday	2	[STORE VIEW]

Below the General Settings, there are sections for 'Coupon generator settings' and 'Email settings', both of which are currently collapsed.

Configure the coupon settings

You can adjust the coupon settings on the next tab. The exact path is **System** → **Configuration** → **Neklo** → **Birthday Discount Coupon** → **Coupon generator settings**. You will see the following:

1. **Code Length** indicates the full length of the coupon code without prefixes, suffixes, and separators.
2. **Code Format** regulates the code representation: it may be alphanumeric, alphabetical, or numeric.
3. **Code Prefix** sets the prefix that will be assigned to all the codes.
4. **Code Suffix** sets the suffix that will be assigned to all the codes.
5. **Dash Every X Characters** sets the dash symbol after every given amount of characters.

The screenshot displays the Magento Admin Panel interface. At the top, the header includes the Magento logo, 'Admin Panel', a search bar, and user information: 'Logged in as admin | Friday, June 29, 2018 | Log Out'. Below the header is a navigation menu with tabs for Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System (which is currently selected). A 'Get help for this page' link is also present.

The main content area is titled 'Birthday Discount Coupon' and features a 'Save Config' button. The configuration is organized into sections: 'General Settings' (expanded to show 'Coupon generator settings') and 'Email settings'. The 'Coupon generator settings' section contains the following fields:

Field Name	Value	Scope
Code Length	8	[GLOBAL]
▲ Excluding prefix, suffix and separators.		
Code Format	Alphanumeric	[GLOBAL]
▲ Format of the coupon code.		
Code Prefix		[GLOBAL]
▲ Coupon code prefix.		
Code Suffix		[GLOBAL]
▲ Coupon code suffix.		
Dash Every X Characters	0	[GLOBAL]
▲ If empty no separation.		

On the left side, there is a 'Configuration' sidebar with a 'Current Configuration Scope' dropdown set to 'Default Config' and a 'Manage Stores' link. The sidebar lists various configuration categories under 'GENERAL' and 'CATALOG'.

Configure the email settings

The email settings may be found on the next tab. Here is the path: **System** → **Configuration** → **Neklo** → **Birthday Discount Coupon** → **Coupon generator settings**. Here are the following options:

1. **Birthday Email Template** sets the template of the sent email.
2. **Birthday Email Sender** regulates the identity of the Sender.

The screenshot shows the Magento Admin Panel interface. At the top, there is a navigation bar with the following tabs: Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System (which is currently selected). The page title is "Magento Admin Panel" and it shows the user is logged in as "admin" on "Friday, June 29, 2018".

The main content area is titled "Birthday Discount Coupon" and includes a "Save Config" button. The configuration is organized into sections: "General Settings", "Coupon generator settings", and "Email settings".

Under "Email settings", there are two configuration items:

Field Name	Value	Store View
Birthday Email Template	[NEKLO LLC] Birthday Discount Coupon (Defau... ▲ Transactional email template.	[STORE VIEW]
Birthday Email Sender	General Contact ▲ Identity of sender.	[STORE VIEW]

On the left side, there is a "Configuration" sidebar with a "Current Configuration Scope" dropdown set to "Default Config" and a "Manage Stores" link. The sidebar also lists various configuration categories: GENERAL (expanded), General, Web, Design, Currency Setup, and Store Email Addresses.

Support

Thank you for using this extension. You will find more our great solutions for Magento here: store.neklo.com