

SMS NOTIFICATION

USER GUIDE

Version 1.0.0

Welcome to SMS Notification Extension for Magento 2 developed by Sparsh.

This extension enhances the user experience by instantly notify customers and administrator via SMS about their order/invoice/shipment/credit memo creation.

KEY FEATURES:

- ❖ Notify customers and admin via SMS about activities such as order placement or cancellation, invoice, shipment and credit note generation, etc. in Magento 2 store
- ❖ As soon as the mobile number is captured with the Magento 2 store, SMS notification is sent for each store and order activity.
- ❖ Admin can activate or deactivate SMS Notification from the backend
- ❖ Create custom SMS templates with dynamic variables
- ❖ Make use of system variables like customer_name, order_id, shop_name, shop_url, and many others to prepare custom SMS notification texts
- ❖ Supports the world's leading SMS service providers: Twilio and Msg91
- ❖ Enable/Disable customer notifications
- ❖ Admin can set a mobile number to get notified of each store order updates
- ❖ SMS notification enhances customer loyalty, build trust and credibility of your brand

1. CONFIGURE SMS NOTIFICATION EXTENSION

To use this extension, you first need to enable it from the backend.

Go to Magento 2 Admin > Login > Stores > Configuration > Sparsh Extensions > SMS Notification.

Expand the **General** section, and do the following:

- **Enabled For Customer:** Select “Yes” to send SMS notifications to customers.

- **Send Notification To Customer When:** Choose events for which you like to send notifications to customers. E.g. Order placed, Order Cancelled, Invoice Generated, Shipped, or Refund.
- **Enabled For Admin:** Select “Yes” to send SMS notifications to the admin.
- **Send Notification To Admin When:** Choose events for which you like to send notifications to the Admin. E.g. Order placed, Order Cancelled, Invoice Generated, Shipped, or Refund.
- **Admin Phone Number:** Enter the phone number on which admin will receive the notification. Add the number with country code without + sign.

General

Enabled For Customer [store view] Yes

Send Notification To Customer When [store view]
Order Placed
Order Cancelled
Invoice Generated
Shipped
Refund

Enabled For Admin [store view] Yes

Send Notification To Admin When [store view]
Order Placed
Order Cancelled
Invoice Generated
Shipped
Refund

Admin Phone Number [store view]

Please add number with country code without + sign.

Expand the **API** section, and do the following:

- **API Gateway:** Choose the API Gateway to be used to send SMS notifications. Available options are: Twilio and Msg91

You will need to create an account on respective SMS providers and enter the authentication details from your account.

For Twilio, you need to enter SID, Token, and Number assigned to your Twilio account.

API

API Gateway [store view] Twilio ▼

SID [store view]

Token [store view]

Number [store view]

Please add number with country code without + sign.

For Msg91, you need to enter Sender Id, Authentication Key, and need to choose the message type which is the “Transactional” or “Promotional”.

API

API Gateway [store view] Msg91 ▼

Message Type [store view] Transactional ▼

Authentication Key [store view]

Sender Id [store view]

Expand the **Message Text For Customer** section, and do the following:

- **After Order Placed:** Enter the SMS template text to be sent to customers when a new order is placed. You can use {{customer_name}}, {{order_id}}, {{shop_name}}, {{shop_url}}.
- **After Order Cancel:** Enter the SMS template text to be sent to customers when an order is cancelled. You can use {{customer_name}}, {{order_id}}, {{shop_name}}, {{shop_url}}.
- **After Invoice Generated:** Enter the SMS template text to be sent to customers when an invoice is generated. You can use {{customer_name}}, {{invoice_id}}, {{order_id}}, {{shop_name}}, {{shop_url}}.

- **After Shipment:** Enter the SMS template text to be sent to customers when shipment is created. You can use {{customer_name}}, {{shipment_id}}, {{order_id}}, {{shop_name}}, {{shop_url}}.
- **After Creditmemo:** Enter the SMS template text to be sent to customers when credit memo is generated. You can use {{customer_name}}, {{shop_name}}, {{shop_url}}.

Message Text For Customer

<p>After Order Placed <small>[store view]</small></p>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> <p>Hi {{customer_name}}, Your order with {{order_id}} at {{shop_name}} has been successfully placed.</p> </div> <p><small>You can use {{customer_name}}, {{order_id}}, {{shop_name}}, {{shop_url}}.</small></p>
<p>After Order Cancel <small>[store view]</small></p>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> <p>Hi {{customer_name}}, Your order with {{order_id}} at {{shop_name}} has been successfully cancelled.</p> </div> <p><small>You can use {{customer_name}}, {{order_id}}, {{shop_name}}, {{shop_url}}.</small></p>
<p>Invoice Generated <small>[store view]</small></p>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> <p>Hi {{customer_name}}, Your invoice for order ID {{order_id}} has been generated with {{invoice_id}} Invoice ID. You can download it from your registered Email ID.</p> </div> <p><small>You can use {{customer_name}}, {{invoice_id}}, {{order_id}}, {{shop_name}}, {{shop_url}}.</small></p>
<p>After Shipment <small>[store view]</small></p>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> <p>Shipped: Your order with {{order_id}} at {{shop_name}} has been shipped with {{shipment_id}}. It will arrive soon at your doorstep.</p> </div> <p><small>You can use {{customer_name}}, {{shipment_id}}, {{order_id}}, {{shop_name}}, {{shop_url}}.</small></p>
<p>After Creditmemo <small>[store view]</small></p>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> <p>Hi {{customer_name}}, Your refund request for the order with {{order_id}} at {{shop_name}} has been successfully approved.</p> </div> <p><small>You can use {{customer_name}}, {{shop_name}}, {{shop_url}}.</small></p>

Expand the **Message Text For Admin** section, and do the following:

- **After Order Placed:** Enter the SMS template text to be sent to the admin when a new order is placed. You can use {{customer_name}}, {{order_id}}, {{shop_name}}, {{shop_url}}.

- **After Order Cancel:** Enter the SMS template text to be sent to the admin when an order is cancelled. You can use {{customer_name}}, {{order_id}}, {{shop_name}}, {{shop_url}}.
- **After Invoice Generated:** Enter the SMS template text to be sent to the admin when an invoice is generated. You can use {{customer_name}}, {{invoice_id}}, {{order_id}}, {{shop_name}}, {{shop_url}}.
- **After Shipment:** Enter the SMS template text to be sent to the admin when shipment is created. You can use {{customer_name}}, {{shipment_id}}, {{order_id}}, {{shop_name}}, {{shop_url}}.
- **After Creditmemo:** Enter the SMS template text to be sent to the admin when credit memo is generated. You can use {{customer_name}}, {{shop_name}}, {{shop_url}}.

Message Text For Admin

After Oder Placed
[store view]

A new order has been placed at {{shop_name}} with below details: Customer: {{customer_name}} Order ID: {{order_id}}

You can use {{customer_name}}, {{order_id}}, {{shop_name}}, {{shop_url}}.

After Oder Cancel
[store view]

An order with {{order_id}} has been requested for cancellation with below details: Customer: {{customer_name}} Order ID: {{order_id}}

You can use {{customer_name}}, {{order_id}}, {{shop_name}}, {{shop_url}}.

After Invoice
[store view]

A new invoice for the order with {{order_id}} has been generated with below details: Customer: {{customer_name}} Invoice ID: {{invoice_id}}

You can use {{customer_name}}, {{invoice_id}}, {{order_id}}, {{shop_name}}, {{shop_url}}.

After Shipment
[store view]

An order of customer {{customer_name}} with {{order_id}} has been shipped with {{shipment_id}}.

You can use {{customer_name}}, {{shipment_id}}, {{order_id}}, {{shop_name}}, {{shop_url}}.

After Creditmemo
[store view]

A customer with following details has requested refund: Customer: {{customer_name}} Order ID: {{order_id}}

You can use {{customer_name}}, {{shop_name}}, {{shop_url}}.

Clear cache from System > Tools > Cache Management if required.

2. SMS NOTIFICATION

Once saved and configured as above, whenever a new order is placed or canceled or an invoice or shipment or credit note is generated, the admin and customer will receive an SMS for the related activity.

For customers to receive a notification, the mobile number needs to be captured by the system first from the checkout or any other page.

