

Installation Guide

This guide describes how to set up the Wishlist Plus widget on your Magento Store.

Disabling Compilation

- Log in to your Magento account
- Click System
- Click Tools
- Click Compilation
- Click Disable

Install the Engage by Swym Extension

- Click System
- Click Magento Connect
- Click Magento Connect Manager
- Click Choose File under Direct package file upload
- Upload the package file
- Click Upload
- The following message should appear:

Install the Engage by Swym Widget

Note: Make sure compilation is disabled in your Magento admin before you install the Engage Widget. You can re-enable compilation after you install the Engage Widget.

Installing the Widget

- Click Return to Admin
- Click System
- Click integrations
- Find 'Swym Relay' in the list & click 'Activate' in the next row
- Click Allow in the pop-up
- Copy the Access token & save it for later use.
- Click Done
- Select your store view name from the Configuration Scope drop-down menu
- Click Swym on the left sidebar
- Click the Engage configuration tab on the left sidebar

- Paste the access token in the textbox labelled access token
- Click save config
- Click on Swym dashboard to start the installation process

Note: If you encounter a "404 page not found" error, log off Magento and log back in.

Configuring the app

The app setup wizard will automatically launch to help you configure the app. There are 5 steps in the Wizard – Plan selection, App settings, Wishlist settings, In-stock Alerts settings, Triggered Emails settings, and finally an activation step to publish the app live on your store.

Step 1: Plan Selection

As a first step you would be prompted to select a plan. Please choose the plan best suited to your needs based on the description provided. Since all our plans allow a **14 day free trial**, we'd recommend picking the ideal plan that you think you'll want so you can experience all the powerful features that the app provides. Once you've selected a plan for the app, you will be redirected to a so you can confirm the payment details – note that you will not be charged until after your free trial has elapsed and you do have the option to cancel at any time during the trial period. Upon confirming the payment details, you can continue configuring the app on the next page.

Engage

Help your shoppers pick up where they left off
Select your plan. Try it free for 14 days.

Monthly (selected) Annual Save 12% annually

	STARTER \$19.99 _{/MO} \$239.88 annually 1000 users	PRO \$49.99 _{/MO} \$599.88 annually 5000 users	PREMIUM \$99.99 _{/MO} \$1199.88 annually 10000 users	PLUS \$249.99 _{/MO} \$2999.88 annually 25000 users
Support upto	1000 users	5000 users	10000 users	25000 users
Wishlist module	✓	✓	✓	✓
Order history/status	✓	✓	✓	✓
Basic email customization	✓	✓	✓	✓
Basic customization support	✓	✓	✓	✓
Back-in-Stock app in-built	✗	✓	✓	✓
Rich email templates support	✗	✓	✓	✓
FB pixel support	✗	✓	✓	✓
Support for triggers	✗	✓	✓	✓
Native integration with your ERP	✗	✗	✓	✓
Third-party integrations	✗	✗	✓	✓
Premium hosting	✗	✗	✓	✓
Dedicated customer success champion	✗	✗	✗	✓
Improved support SLAs	✗	✗	✗	✓

Need more volume? Contact us for custom pricing

By clicking here, I agree to accept Swym Corporation's Terms of Service and Privacy Policy

Confirm

Step 2: App Settings

These are the general settings that will be reflected throughout your store.

COLOR : This is the default color that will be used on all the Engage UI components. Clicking on the color block will open up the color picker. You can either pick a color via the picker, or enter a hex code that matches the color scheme that you use in your store.

NAME : Name of what you want to call the Engage module on your store. This is the name that we will use to refer to your “Engage” on your store – and therefore, you’ll want to brand this module such that it appeals to your audience, i.e your loyal customer base.

TAGLINE : Tagline of what you want to call the Engage module through your store. This is the tagline that help your customer understand the purpose of the “Engage” on your store.

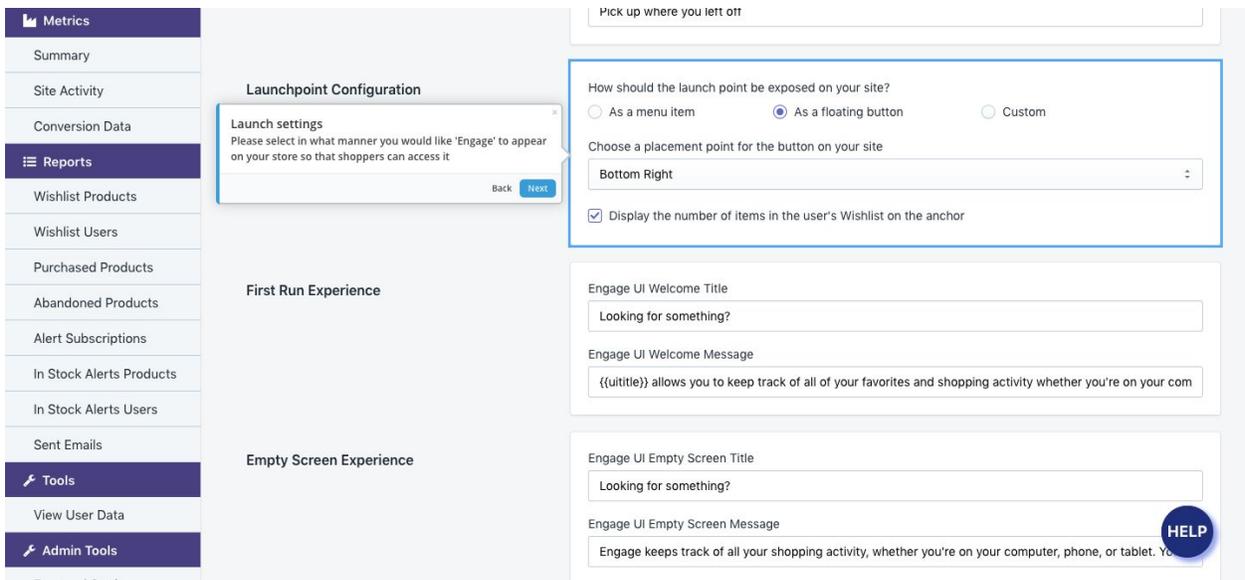
Click NEXT to move to the next step in the walkthrough.

The screenshot displays the 'Engage Settings' page in a web application. On the left is a navigation sidebar with categories: App Setup (Engage), Metrics (Summary, Site Activity, Conversion Data), Reports (Wishlist Products, Wishlist Users, Purchased Products, Abandoned Products, Alert Subscriptions, In Stock Alerts Products, In Stock Alerts Users, Sent Emails), Tools (View User Data), and Admin Tools. The main content area is titled 'Engage Settings' and includes an 'Activate' button. Below this is the 'App UI Settings' section, which is divided into 'General Settings' and 'Launchpoint Configuration'. In the 'General Settings' section, there is a 'Display settings' tooltip that reads: 'Display settings. Please review these settings so that the widget's UI matches your store theme.' Below the tooltip, the 'General Settings' includes: 'Your store is on Premium plan' with a 'Change' button; 'Color | Color theme for your Engage module launch point, UI etc.' with a text input containing '#7E57C2' and a color picker; 'Name | What do you want to call your Engage module?' with a text input containing 'Shopping Assistant'; and 'Tagline | What tagline do you want to give to your Engage module?' with a text input containing 'Pick up where you left off'. The 'Launchpoint Configuration' section includes: 'How should the launch point be exposed on your site?' with radio buttons for 'As a menu item', 'As a floating button' (selected), and 'Custom'; 'Choose a placement point for the button on your site' with a dropdown menu showing 'Bottom Right'; and a checked checkbox for 'Display the number of items in the user's Wishlist on the anchor'. A 'HELP' button is located in the bottom right corner of the settings area.

This step is for configuring the entry point to the Engage app page.

LAUNCH POINT TYPE : You have 4 options for the launch point – you can configure this as it exists, a menu item, a floating button or as a custom button.

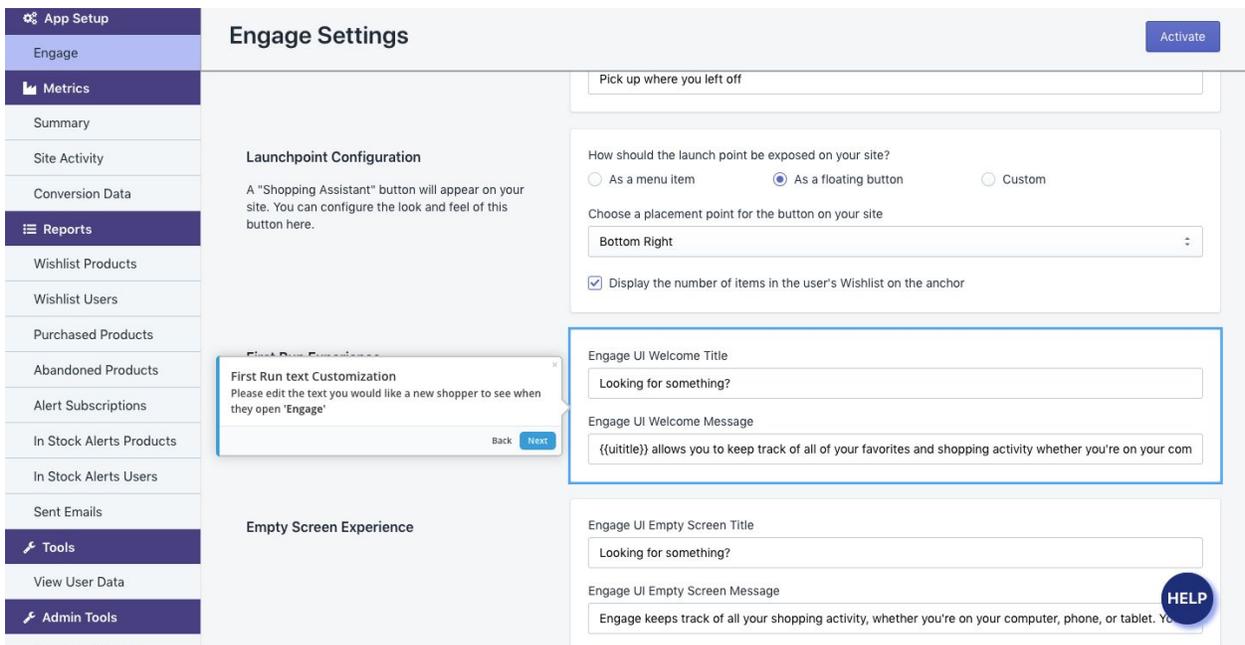
- Floating button is the default and is positioned on fixed places on the screen for Desktop, Tablet and Mobile (don't worry, we've made sure the design is responsive and adapts itself to the device)
- Menu item allows you to configure the entry point as a menu option in the navigation bar. Since every theme has the navigation differently, we show the instructions on how to enable it on your store.



This step is for configuring what first time visitors would see when they open the Engage app page.

TITLE: The title of the message that you would like the first-time visitors to see. This is the title that would help 1st time visitors understand the purpose of the widget and therefore, you'll want to brand this module such that it appeals to your audience.

MESSAGE: The message that you would like the first-time visitors to see. This is the brief description that would help these visitors understand how to use the widget as part of their shopping journey.



This step is for configuring the basic email settings, ensuring a connected email experience.

FROM NAME: The sender's name you want to appear for mail communications sent to your customers by the app. We recommend using the same name that you are using in other email messages that you send to your customers

REPLY TO EMAIL: The email address that you want the message to be sent in case a customer responded to your email. This can be your default support email address or any other email address that you are using as part of other email messages.

STORE LOGO: The logo of the store as you want it to appear in the header of the email content. This helps in creating a better brand recognition.

The screenshot shows the 'Engage Settings' page. On the left is a sidebar with navigation options: App Setup, Engage, Metrics, Reports, Tools, and Admin Tools. The main content area is titled 'Engage Settings' and has an 'Activate' button in the top right. It is divided into three sections: 'Engage Settings', 'Display Settings', and 'Enabled Features'. The 'Engage Settings' section contains input fields for 'Last Name', 'Contact Email' (with 'admin@swymcorp.com' entered), 'From Name' (with 'swymutest' entered), and 'Reply to Email' (with 'admin@swymcorp.com' entered). A checkbox labeled 'Get permission from user before sending Wishlist reminder emails' is checked. Below this is a section for 'Upload your store's logo' with a note 'No custom icon file chosen (We recommend using a logo that is 150px tall)' and an 'Upload Store Logo' button. The 'Display Settings' section has a tooltip for 'Email settings' with a 'Next' button. The 'Enabled Features' section shows 'Wishlist' with a 'Disable' button. A 'HELP' button is in the bottom right corner.

Step 3: Wishlist settings

This step is for configuring the look & feel of your wishlist buttons on the product pages.

ENABLE/DISABLE: You can choose to enable/disable the wishlist functionality of Engage. In case, you choose to disable the wishlist buttons would not appear on your product pages. We recommend using this functionality since it helps get better user context & a consolidated view of the user journey.

In case you have enabled the wishlist functionality, the next steps help you configure how the "Add to wishlist" button should look in the Product pages. By default this "Add to wishlist" button will appear next to the 'Add to cart' button on the product page.

APPEARANCE: We give you options to choose from different button styles of how the “Add to wishlist” button should appear in the product pages. Here are the options

- Icon + label as a button
- Label as a button
- Icon only
- Icon + label as a hyperlink
- Label as a hyperlink

Alternatively, you can choose to continue using the button on your theme by turning the ‘custom’ option off.

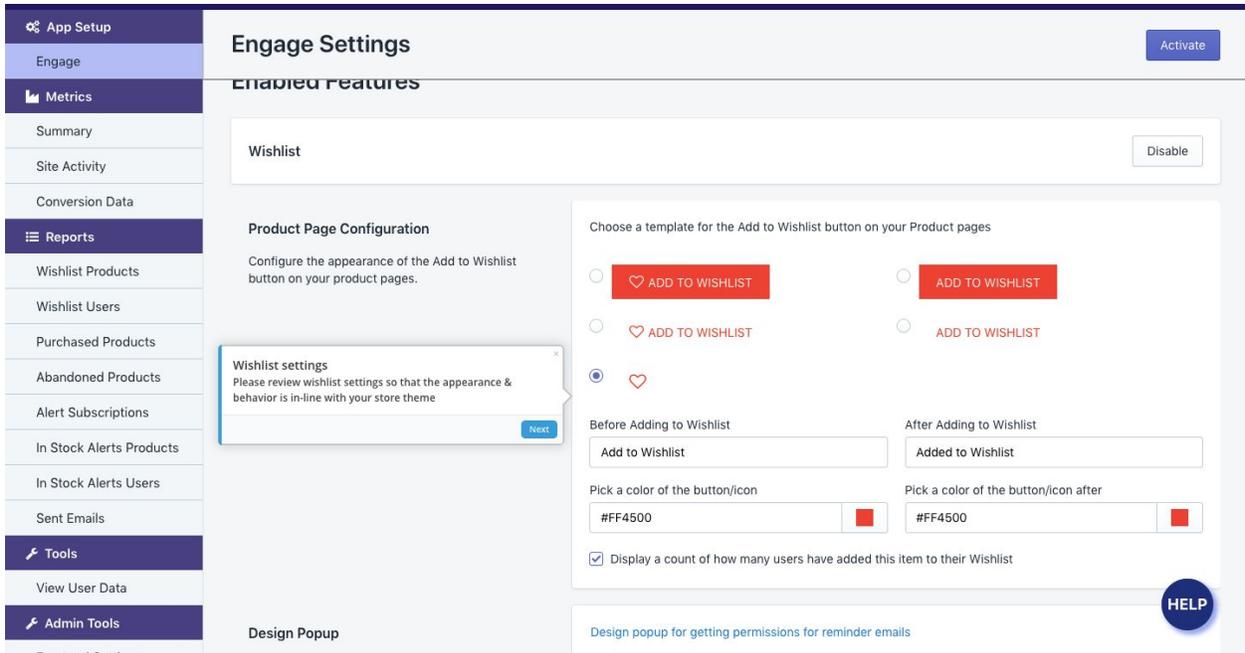
BEFORE ADDING TO WISHLIST TEXT: This is the text that appears on the wishlist button before the customer clicks on it. You can customize it to match your store style.

ADDED TO WISHLIST TEXT: Once the wishlist button is clicked by shopper to wishlist the product, This is the text that would start appearing on the button.

BEFORE BUTTON COLOR: You can use this option to define the color of the button that should appear by default. Clicking on the color block will open up the color picker. You can either pick a color via the picker, or enter a hex code that matches the color scheme that you use in your store.

AFTER BUTTON COLOR: This is the color of the button once the user has wishlisted a product. Clicking on the color block will open up the color picker. You can either pick a color via the picker, or enter a hex code that matches the color scheme that you use in your store.

WISHLIST COUNT: This is a counter that will display a count of how many users have added that particular product to their Wishlist and helps with social proof.



Step 4: In-stock alert settings

This step is for configuring the look & feel of your “email me when available” buttons & form on the product pages where a variant is out-of-stock.

ENABLE/DISABLE: You can choose to enable/disable the in-stock alert functionality of Engage. In case, you choose to disable the ‘subscribe for alert’ button would not appear on your product pages. We recommend using this functionality since it helps get better user context & a consolidated view of the user journey.

In case you have enabled the In-stock alert functionality, the next steps help you configure how the “email me when available” button should look in the Product pages. By default this button will appear next to the ‘Add to cart’ button on the product page.

TEMPLATE: We give you options to choose from different button styles of how the “Email me when available” button should appear in the product pages. Here are the options

- Icon + label as a button
- Label as a button
- Icon only

COLOR: This is the default color that will be used for the ‘email me when available’ button. Clicking on the color block will open up the color picker. You can either pick a color via the picker, or enter a hex code that matches the color scheme that you use in your store.

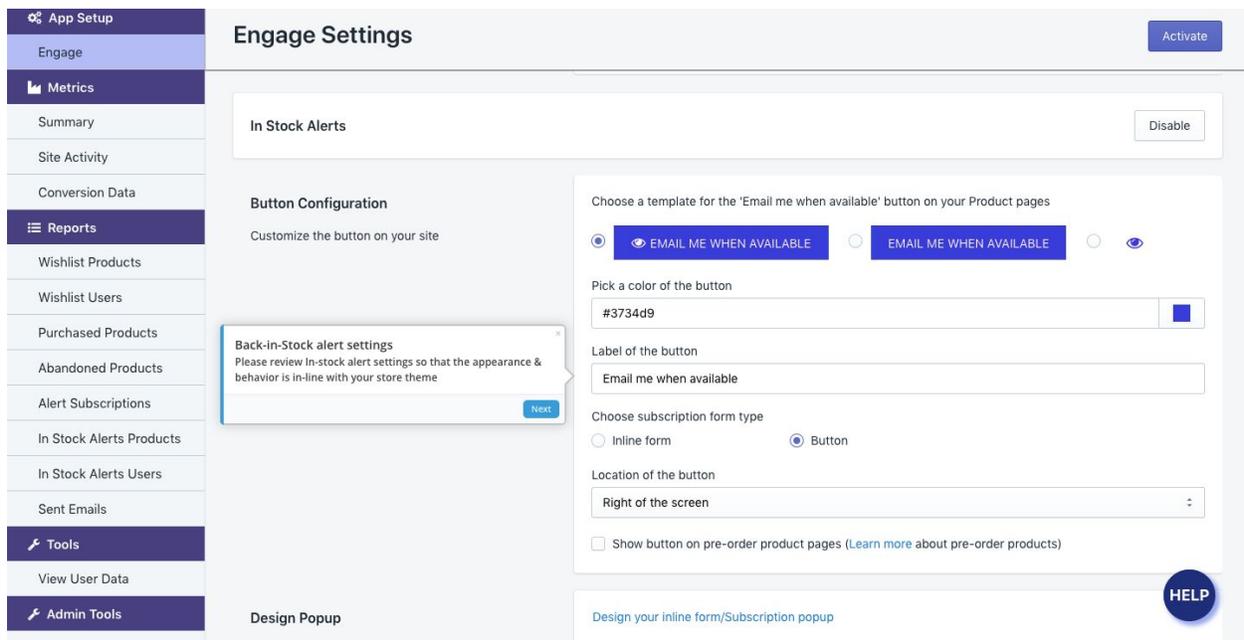
LABEL: This is the text that appears on the in-stock alert button that would open the 'subscribe me' form

FORM TYPE: You can choose how you would like the form to appear on your pages. Here are the options:

- **In-line form:** A form with an option to enter the email-id would appear under your 'add to cart' button. The customer can directly enter his email-id & click on Subscribe.
- **Button:** In case, you feel having a form on the page is not ideal for your store. You can choose to have a button appear on the page instead. Clicking the button will slide out the form onto the screen for the customer to enter his details.

BUTTON LOCATION: You can choose where you would like the button to be placed on the pages. Here are the options:

- Next to the 'add to cart' button
- Right of the screen
- Left of the screen

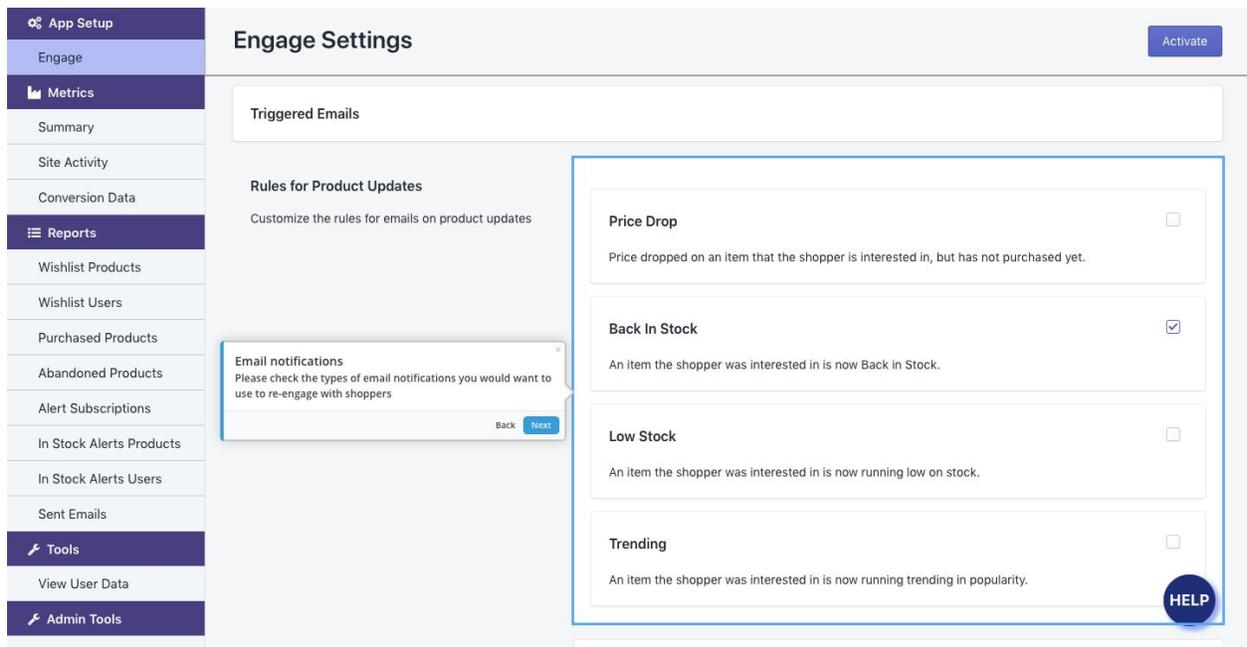


Step 5: Triggered Email Rules

This step is for configuring the type of personalized alerts/notifications that you would like to send to a customer. You can choose to enable/disable them based on your preferences

PRODUCT UPDATE RULES

- **Price Drop:** Sends an email alert when the price is dropped on an item that the shopper is interested in, but has not purchased yet.
- **Back in Stock:** Sends an email alert when a product that the shopper is interested in, but has not purchased yet, is back in stock.
- **Low Stock:** Sends an email alert when a product that the shopper is interested in, but has not purchased yet is running low on inventory.
- **Trending:** Sends an email alert when a product that the shopper is interested in, but has not purchased yet, is gaining popularity among your customers.

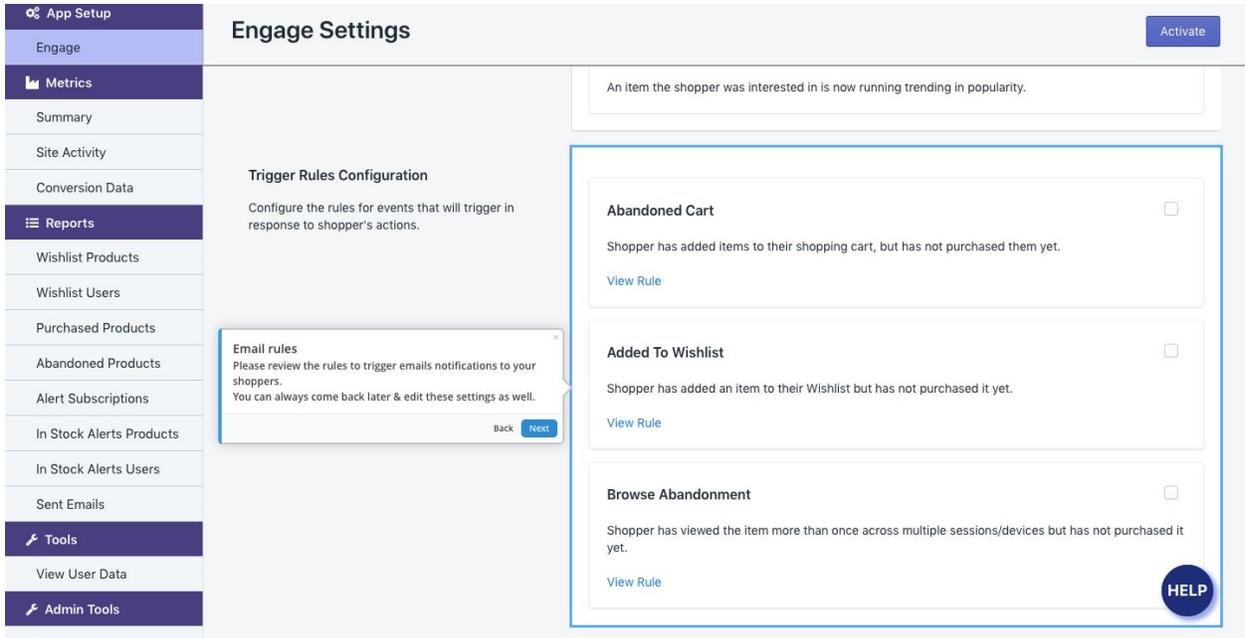


You can choose to configure other types of notifications to further capture the attention of the customer.

ABANDONED CART: Send an email alert to the shopper has added to products to cart, but has not purchased them even after a certain time period.

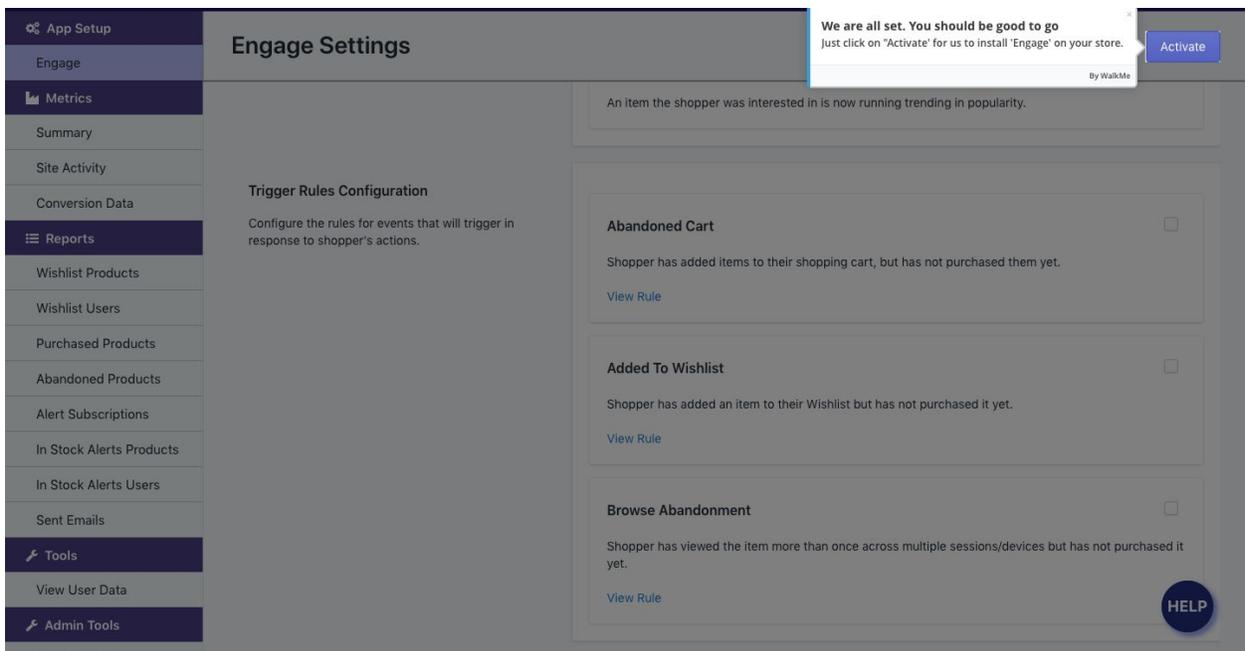
ADDED TO WISHLIST: Send an email alert to the shopper has added to products to their wishlist, but has not purchased them even after a certain time period.

BROWSE ABANDONMENT: Send an email alert to the shopper has spent more than certain seconds on the page, but has not purchased them even after a certain time period.



Step 6: Activating Settings

Click on 'activate' to install the Engage app on your store & save the settings configurations.



You are all done !!! This is the last step in your Engage Wizard Setup

Note: We strive really hard to work seamlessly across all Magento themes but some themes might need a bit of tweaking for the buttons to show up correctly. Please reach out to us if this is the case

with your store's theme, and we can quickly fix it. At any point during the setup, help is just a click away. If you need our help with any aspect of the setup, because the options aren't clear, or because the app doesn't seem to be getting installed correctly on your theme, just click the [EMAIL SUPPORT](#) button on the bottom bar and one of our talented support agents will get back to you as soon as possible to help.