

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](#)
 - [How to create an email and SMS to send customers?](#)
 - [How to send a follow-up email and SMS?](#)
 - [Email](#)
 - [SMS](#)
- [Feature list](#)
- [Configuration](#)
 - [General Configuration](#)
 - [General](#)
 - [Abandoned cart reminder](#)
 - [Customer No Activities Reminder](#)
 - [Mandrill Integration](#)
 - [NexMo Integration](#)
 - [Mobile number of customer](#)
 - [Setting Up Rules](#)
 - [Rule Information](#)
 - [Condition](#)
 - [Email Chain](#)
 - [SMS](#)
 - [Google Analytics](#)
 - [Coupon](#)
 - [Mail Log](#)
 - [SMS Log](#)
 - [Abandoned Cart List](#)
 - [Abandoned Cart Charts](#)
 - [Customer Event Collect](#)
 - [Email Campaign Charts](#)
 - [Sample Email Template](#)
 - [Abandoned carts reminder](#)
 - [Event email template](#)
 - [Integration with Mandrill to send email](#)
 - [Sample Email](#)
 - [Integration with Nexmo to send SMS](#)
 - [Sample SMS](#)
- [Update](#)
- [Support](#)

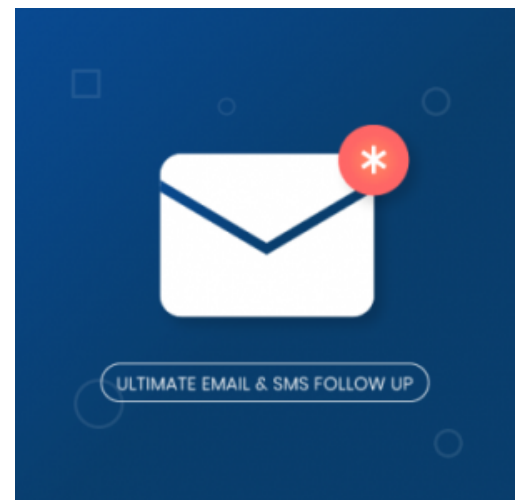
Introduction

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 a 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 affects 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 allows you to send direct SMS to your customers by integrating with [Nexmo](#). The system will allow you to send SMS to customers after they place an 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.

Feature list

- Allow admin to create different rules for sending emails.
 - Allow customers to choose from predefined email rules.
 - Set multiple email templates for each rule.
 - Set emailing schedule.
 - Add coupon code to emails.
 - View abandoned cart rate.
 - Smart abandoned cart.
 - View history of sent emails (mail log).
 - Fully flexible rules and conditions.
 - Allow admin to attach files into the email.
 - Allow admin to manage abandoned cart list.
 - Allow admin to search customer birthday list.
 - Make sure that the email will not be considered as spam with Mailchimp Mandrill integration.
 - Allow admin to configure whether the mobile field is visible and/or mandatory in customer registration form.
 - Integrate Magento 2 stores with Nexmo to send SMS to the customer's cell phone.
 - Create contents and schedules to send SMS to customers for each event.
 - Allow admin to send or cancel SMS manually.
-

System Requirements

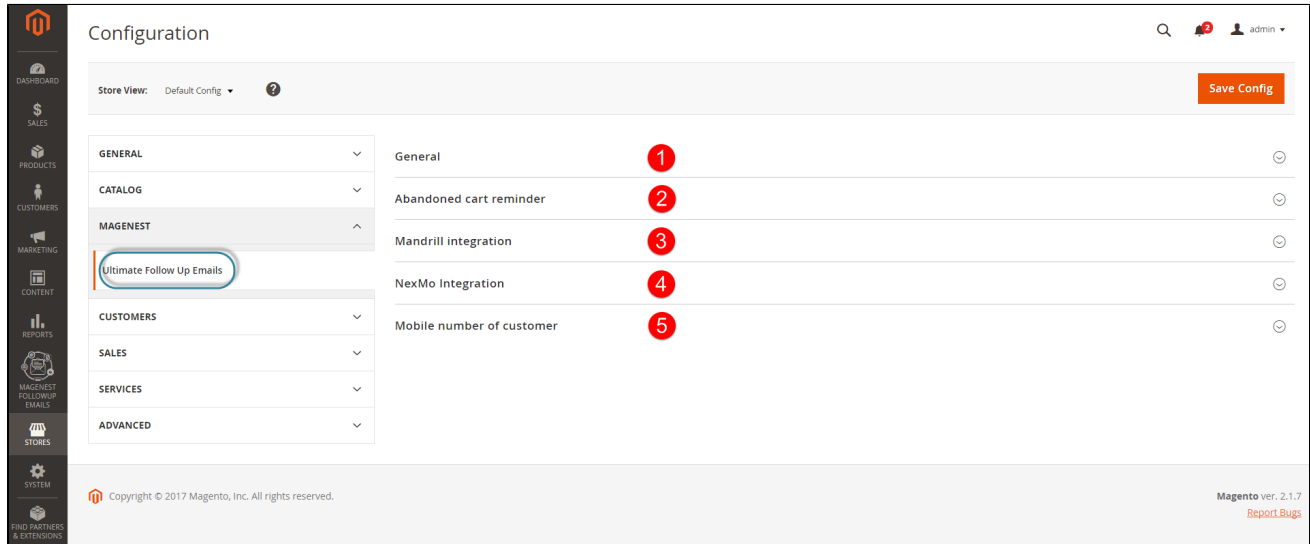
Your store should be running on Magento Edition version **2.x.x**.

Configuration

General Configuration

+ On the Admin sidebar, tap **Follow Up Emails And SMS**, then choose **Configuration**.

General



+ Set the following fields:

- **Email Sender:** choose the default sender for the reminder email.
- **BBC name:** Enter the name of the blind carbon copied receiver.
- **BBC email:** Enter the email address of blind carbon copied receiver.

Abandoned cart reminder

+ **Enable Abandoned Cart:** choose **Yes** to enable the abandoned cart feature.

+ **Time to be considered as abandoned cart:** set the time to trigger the cart as "abandoned" after being left on the store. The unit is minute(s) and the default time is 60 minutes if you leave the field blank.

Customer No Activities Reminder

+ **Time to be considered as having no activity:** set the time after that the customer is considered not having any activity after leaving the store. The default unit in this field is **Hour**. If this field is left blank, the default value will be set as 24 hours.

Mandrill Integration

This setting section allows sending massive email (up to 1000 emails).

- **Enable:** Choose **Yes** to enable Mandrill Integration.
- **API key:** Enter the API key for Mandrill Integration.
- After the API Key is entered, the account information will be displayed below.

Save Config

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

NexMo Integration

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

- + **Enable:** choose **Yes** to enable this feature.
- + **API key:** enter Nexmo API Key for the integration.
- + **API secret:** enter Nexmo API Secret key for the integration.

NexMo Integration



Enable [WEBSITE]

Enable this option allows sending message via Nexmo

API key [WEBSITE]

API Secret [WEBSITE]

From [WEBSITE]

Mobile number of customer

- + **Allow mobile field input in customer register form:**
 - **Yes:** If choose **Yes**, there will be an input field for customer's mobile number in the registration form on the storefront.
 - **No:** choose No to **disable** the mobile input field in the customer's registration form.
- + **Make mobile number is a required field:**
 - **Yes:** If choose **Yes**, customer have to fill their mobile number phone when registering for a new account on the store.
 - **No:** If **No**, the mobile input is not required field although this field can remain displayed.

Mobile number of customer

Make mobile is required field

Yes

[WEBSITE]

If you choose yes the mobile input is required field

Allow mobile field input in customer register form

Yes

[WEBSITE]

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

NexMo Integration

Enable

No

[WEBSITE]

If you choose yes the mobile input is required field

API key

[WEBSITE]

API Secret

[WEBSITE]

From

[WEBSITE]

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

Yes

[WEBSITE]

If you choose yes the mobile input is required field

Allow mobile field input in customer register form

Yes

[WEBSITE]

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

Create an Account

Setting Up Rules

We created an **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 **Follow Up Emails And SMS > Trigger Rules**.

SALES

CATALOG

MARKETING

REPORTS

STORES

SYSTEM

Manage Rule

20

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Add New Rule

Filters

Default View

Columns

Actions 6 records found 20 per page 1 of 1

ID	Name	Status	Message Generated	Successfully Sent	Opens	Clicks	Carts Restored	From Date	To Date	Action
3	Test with product MJ09	Active	6	5	3	1	1	2020-03-08	2020-03-10	Select
1	JustATest	Inactive	6	3	2	0	0			Select
2	Just a Test	Inactive	0	0	0	0	0			Select
4	Ordered product	Active	0	0	0	0	0			Select
5	Abandoned Cart Rule 1	Active	0	0	0	0	0	2020-10-05	2020-10-31	Select
6	gh	Active	0	0	0	0	0			Select

+ 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

14

eric

New Rule

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

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

Rule

5

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Back Reset Save

General Information

Event *

Select Option

Abandoned Cart

Customer

Order

Newsletter subscribe

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Magento ver. 2.0.5

+ Event types:

Event Title	Event Description
-------------	-------------------

Abandoned Cart	
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.
Customer	
Customer Registration	Send emails to customers when they created an account at the store
Customer Birthday	Send birthday greetings to the customer in their birthday
Newsletter Subscribe	
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
Wishlist	
Wishlist Item Reminder	Send emails to remind customers about their wishlist
Wishlist Item Back in Stock	Send emails to customers when items in their wishlist back in stock
Wishlist Item On Sales	Send emails to customers When items in their wishlist on sales

+ Click on **Next** button to go to the setting section for the new rule.

Rule Information

+ Enter the basic information for the new rule includes **Rule Name**, **Status**, **Websites**, **Customer Groups**, **applied time (from and to fields)**.

Condition

+ 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 templates sent to the customer when the rule gets triggered for each period. It requires at least 1 email for a rule.

[← Back](#)
[Reset](#)
[Save](#)

FOLLOW UP EMAIL RULE

Rule Information

Condition

Email Chain

SMS

Google Analytics

Coupon

General Information

customer_registration

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

Browse to find or drag files here

Email Template		Day	Hour	Min	Action
Select Email Template ▼	Email Sent After				Delete
Add email in chain					

+ Add the attached files in email.

+ To add a new email to the email chain, click on "Add email in chain" button, select the template and set the time for the mail to be sent.

! To add new template:

- Go to **Marketing > Emails Templates**.
- On **Email Templates** page, click on **Add New Template** button.
- On **New Template** page, choose the default template, then set the **Template Information** section with **Template Name**, **Template Subject**, **Template Content**, **Template Styles**, **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](#)
[Save Template](#)

Load default template

Template

[Load Template](#)

Template Information

Template Name *

Template Subject *

[Insert Variable...](#)

Template Content *

SMS

+ **Message Content:** enter the message send to customers.

+ **Day, hour, minute:** set the sending time.

! **Note:** You can add more than one SMS for a rule to send customers.

Edit Rule

← BackDeleteResetSave

Condition

Email Chain

SMS

Google Analytics

Coupon

SMS

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

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.

Rule

5

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← Back

Reset

Save

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

+ Enable Coupon: choose Yes to active the coupon in the new rule.

+ **Select a promotion rule:** choose a promotion rule. Then choose the coupon you want to send to customer with the follow-up email.

+ Set the available time for the coupon. The coupon is activated right after follow-up email sent.

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

MAGENTEST FOLLOWUP EMAILS

REPORTS

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Edit Rule

← Back

Delete

Reset

Save

FOLLOW UP EMAIL RULE

Rule Information

Conditions

Email Chain

SMS

Google Analytics

Coupon

General Information

Type

abandoned_cart

Select promotion rule to insert coupon .

Enable coupon

Yes

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

Day(s)

Hour(s)

30

Min(s)

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

Discount 5%

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Magento ver. 2.1.0

Account Activity | Report Bugs

Mail Log

- + Go to **Follow Up Emails And SMS > 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.

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

Mail log

Search

Reset Filter

Actions

4 records found

20 per page

1 of 1

	ID	Status	Rule ID	Recipient Name	Recipient Email	Send At	Created at	Action	Preview
Any	From					From	From		
	To					To	To		
☐	1	sent	1	Ron Plance	ronplance@gmail.com	Jun 6, 2016, 2:04:13 AM	Jun 6, 2016, 2:04:33 AM		
☐	2	sent	2	Ron Plance	ronplance@gmail.com	Jun 6, 2016, 3:30:01 AM	Jun 6, 2016, 3:29:02 AM		
☐	3	sent	1	Rony Plance	ronyplance@gmail.com	Jun 6, 2016, 5:34:05 AM	Jun 6, 2016, 5:36:26 AM		
☐	4	sent	1	Ron Plance	ronplance@gmail.com	Jun 6, 2016, 5:39:25 AM	Jun 6, 2016, 5:39:06 AM		

- + 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 **Follow Up Emails And SMS > 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** in **Action** column.

System Messages: 1

SMS log

[Reset Filter](#)
10 records found

20

per page

<

1

of 1

>

ID	Status	Rule ID	Recipient Name	Recipient Mobile	Send At	Created at	Action
From					From	From	
To					To	To	
15	queued	1	Hung Nguyen	0985986898	Jun 27, 2016 2:17:33 AM	Jun 27, 2016 2:14:14 AM	Send now Cancel
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 **Follow Up Emails And SMS > 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

[Reset Filter](#)
3 records found

20

per page

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1

of 1

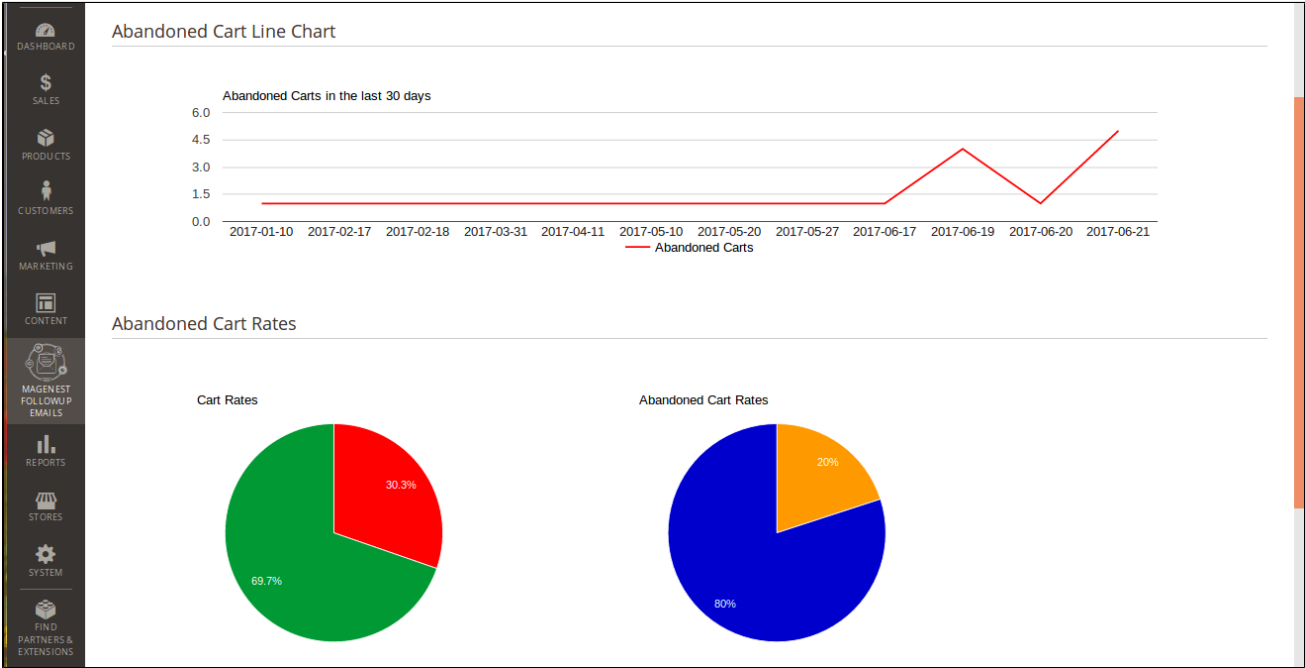
>

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

Abandoned Cart Charts

+ Go to **Follow Up Emails And SMS > 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 here is birthday.

+ Go to **Follow Up Emails And SMS > Customer Birthdays**.

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

BIRTHDAY SEARCH

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

Birthday Search

3 records found

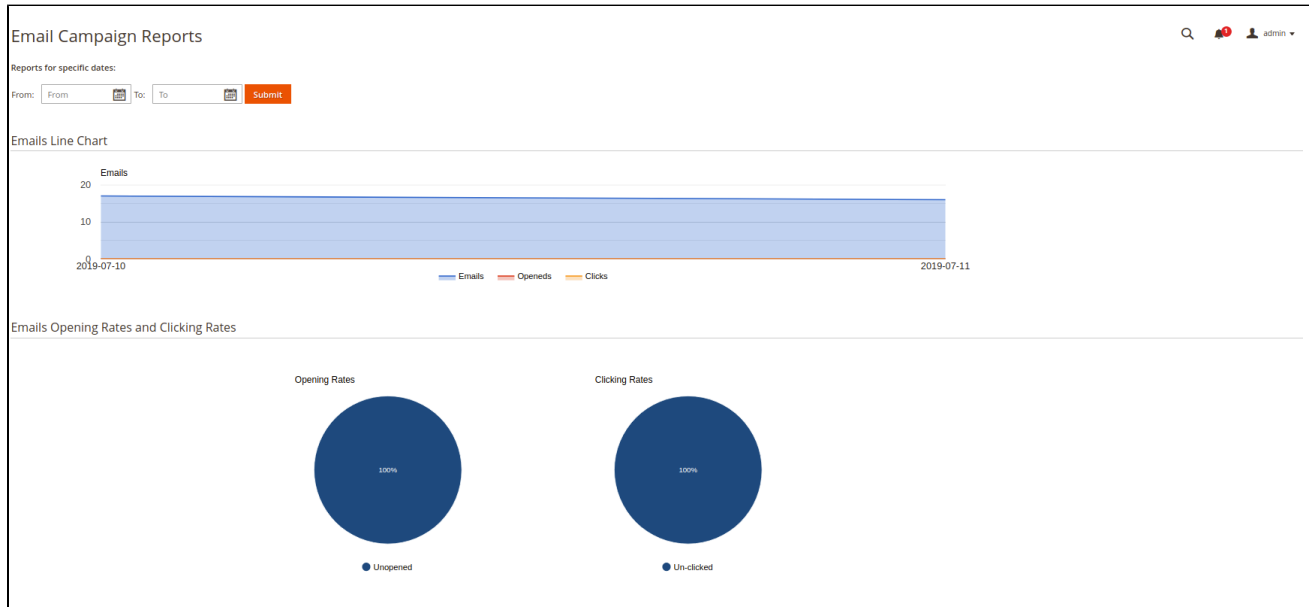
20 per page 1 of 1

ID	Email	LastName	Dob	Is Active	Website	Created at
From			From			From
To			To			To
1	roni_cost@example.com	Costello	Jun 20, 1963	Active	1	May 4, 2016, 8:43:02 PM
2	ronplance@gmail.com	Plance	Jun 30, 1998	Active	1	Jun 6, 2016, 1:24:02 AM
3	ronyplance@gmail.com	Plance	Jun 20, 1979	Active	1	Jun 6, 2016, 5:26:05 AM

Email Campaign Charts

+ Go to **Follow Up Emails And SMS > 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.



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}}

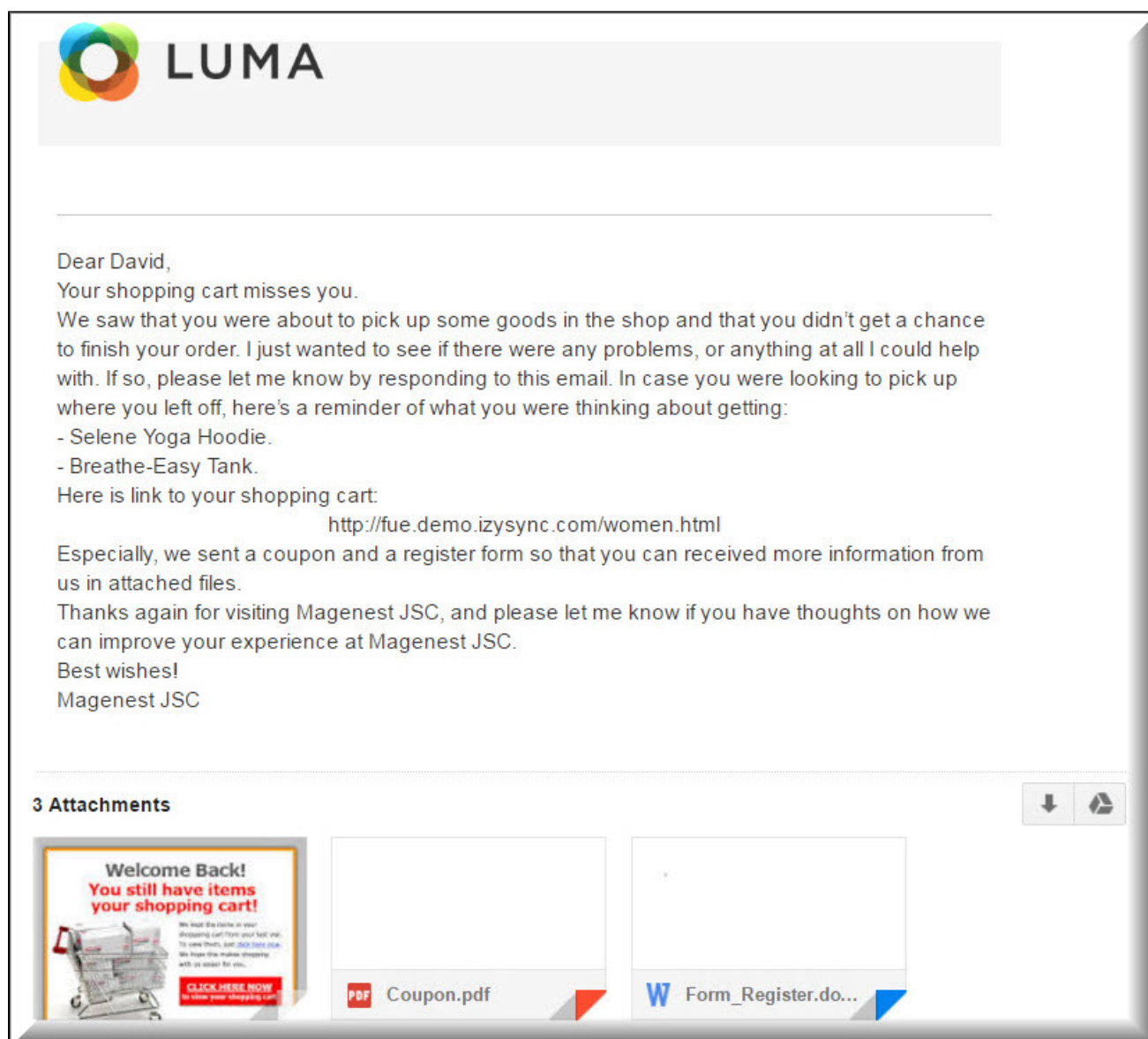
Happy birthday .
We gift a coupon \$50 {{var coupon.code}}

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.



Integration with Nexmo to send SMS

- + This is a great feature that we bring 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 wants to use this feature.
- ⚠ **Note:** the customer needs to enter their exact phone because the system will send an SMS to this phone.

The screenshot shows a registration form with the following sections:

- Personal Information**: Fields for First Name, Last Name, and Email. A checkbox for "Sign Up for Newsletter" is below.
- Sign-in Information**: Fields for Password and Confirm Password.
- Additional Information**: A field for Mobile.

Annotations and settings on the right side of the form:

- A red arrow points from the "Make mobile is required field" dropdown to the Mobile input field.
- A red arrow points from the "Allow mobile field input in customer register form" dropdown to the Mobile input field.
- Both dropdowns are set to "Yes".
- Below the first dropdown: "If you choose yes the mobile input is required field".
- Below the second dropdown: "If you choose yes, there is a mobile input field in customer's registration form".

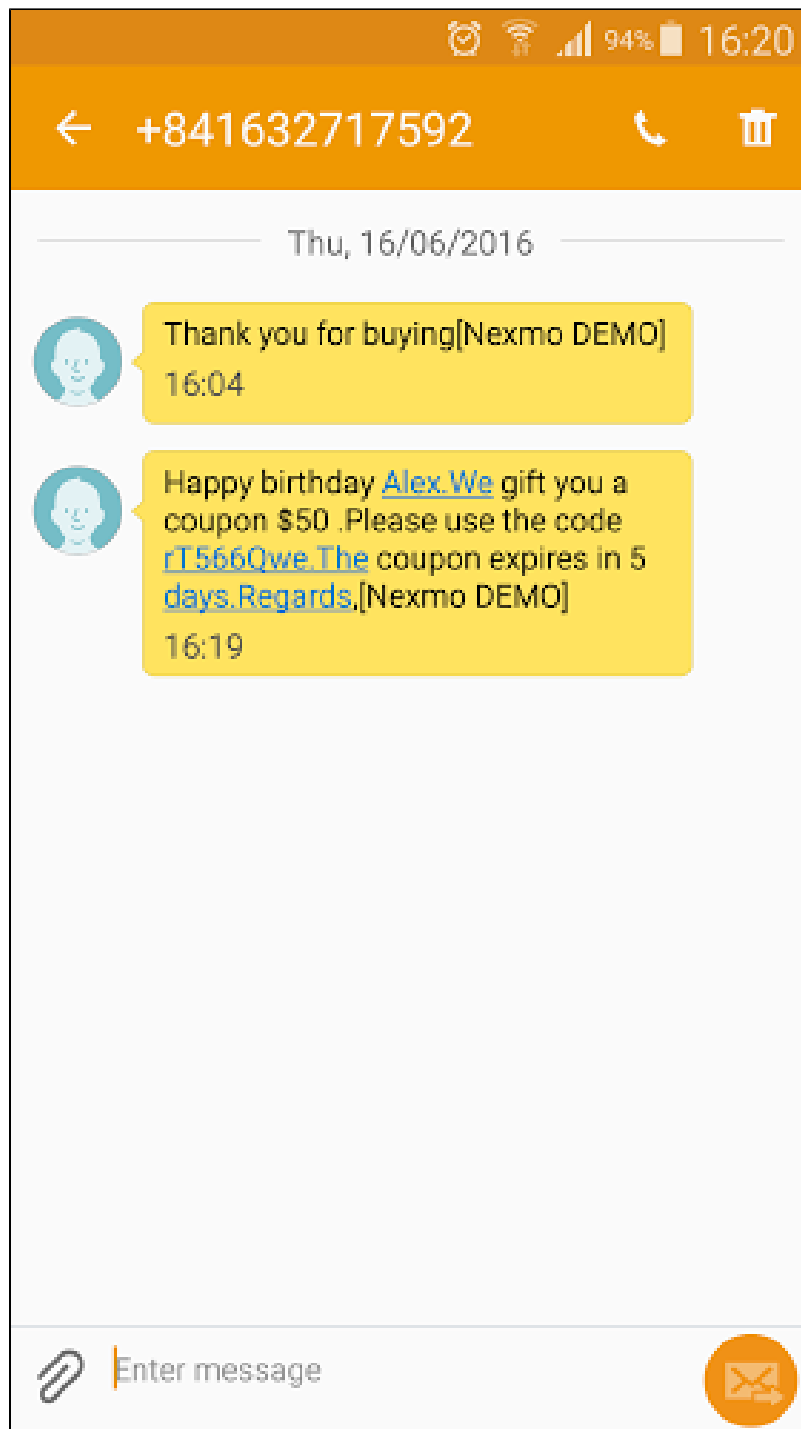
At the bottom left is a blue button labeled "Create an Account".

Sample SMS

The following is an SMS which is sent to the 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 on their birthday.

This is a 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.

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.