

amasty

For more details see the [Follow Up Email](#) extension page.

Guide for Follow Up Email

Increase customers' loyalty with the flexible follow up emailing policy. Adjust the list of events to communicate your customers and boost the number of repeating sales.

- Generate emails for various order statuses
- Provide offers based on the previous orders or a wishlist
- Emails on the customers' activity
- Detailed campaigns statistics

Extension Configuration

To configure the extension, please, go to **System → Configuration → Amasty Extensions → Follow Up Email**.

Please, expand the **General** section:

General		
Winback Period	<input type="text" value="30"/>	[STORE VIEW]
	▲ in days	
The coupon is available only for particular customer	<input type="text" value="No"/>	[GLOBAL]
	▲ If the option is disabled the coupon can be used by all customers.	
Automatically remove sent emails from History	<input type="text" value="In 180 days"/>	[STORE VIEW]
Birthday Offset	<input type="text" value="0"/>	[STORE VIEW]
	▲ Change this to trigger Customer Birthday Start Event before actual birthday date	

Winback Period — specify the time period of absence in days to send winback emails to customers who have not visited the store for some time;

The coupon is available only for particular customer — enable this option to make the coupon available only for the email recipient;

Automatically remove sent emails from History — specify the time period to delete the email from history;

Birthday Offset — define the start of the customer's birthday event before or after the actual date.

Then, proceed to the **Order Statuses** tab.

Order Statuses		
Create	<input type="text" value="Pending"/>	[STORE VIEW]
Ship	<input type="text" value="Processing"/>	[STORE VIEW]
Invoice	<input type="text" value="Processing"/>	[STORE VIEW]
Complete	<input type="text" value="Complete"/>	[STORE VIEW]
Cancel	<input type="text" value="Canceled"/>	[STORE VIEW]

From here you can associate the order statuses with the real events to send promo follow up emails.

Next, expand the **Sender Details** tab:

Sender Details		
Sender Name	<input type="text" value="Owner"/>	[STORE VIEW]
Sender Email	<input type="text" value="owner@example.com"/>	[STORE VIEW]
Sends copy of emails to	<input type="text" value="support@example.com"/>	[STORE VIEW]

Sender Name — fill in the sender name for the follow up email;

Sender Email — specify the sender email for replies;

Sends copy of emails to — fill in the additional email address to send the email copies.

Then, please, proceed to the **Import Blacklist** section:

Import Blacklist		
CSV File	<input type="button" value="Choose File"/> no file selected <small>▲ One email per line</small>	[GLOBAL]

Here, you can import the CSV file with the emails blacklist.

Next, expand the **Testing** section:

Testing		
Safe Mode	<input type="text" value="Yes"/> <small>▲ When safe mode is activated, the extension sends emails only to the test email, nothing will be sent to customers</small>	[GLOBAL]
Recipient Email	<input type="text" value="support@example.com"/>	[GLOBAL]

Safe Mode — enable this option to send email to the test address only;

Recipient Email — fill in the recipient for the test emails.

Rules Configuration

To create a new rule or view the existing ones, please, go to **Promotions → Follow Up Email → Rules**.

ID	Status	Name
10	Active	Order Created
9	Active	Customer winback email
8	Active	Product special offer
7	Active	Birthday Greeting
6	Active	Newsletter Subscription
5	Active	Customer Registration
4	Active	Customer is moved to other group
3	Active	Wishlist Promotion
2	Active	Offer with cross-selling products
1	Active	Reminder for inactive customers

From the grid you can *enable*, *disable* or *delete* certain rules using the mass actions.

New Rule Creating

To create a new rule hit the **Add Rule** button.

General

Name *

Start Event

Cancel Event

Send to Newsletter Subscribers Only

Is Active

Name — fill in the name of the rule;

Start Event — select the event that will trigger the follow up email.

Next, please hit the **Save and Continue Edit** button to proceed with the configuration.

Cancel Event — select the trigger to cancel the email dispatch;

Send to Newsletter Subscribers Only — set this option to **No** if you want to send emails to all the registered customers;

Is Active — enable or disable the rule.

Please, proceed to the **Stores & Customer Groups** tab.

Apply In

Stores

Admin
admin (customer created by admin)
Main Website
Madison Island
English
French
German

▲ Leave empty or select all to apply the rule to any store

Apply For

Customer Groups

NOT LOGGED IN
General
Wholesale
VIP Member
Private Sales Member

▲ Leave empty or select all to apply the rule to any group

From here you can specify the store views and customer groups that will be available for a certain rule.

You can specify **admin** in *Stores* tab. It can be used for customers created in the admin area with the 'Admin' option for 'Associate to Website' field.

Next, switch to the **Sender Details** tab and specify the information about the email sender for the rule.

Sender Details	
Name	<input type="text" value="Sales"/>
Email	<input type="text" value="marketing@example.com"/>
Sends copy of emails to	<input type="text" value="marketing@example.com"/>

On the **Google Analytics** tab you can specify values to track your email campaigns in Google Analytics.

Google Analytics	
Campaign Source	<input type="text" value="store"/> <small>▲ Required. Use utm_source to identify a search engine, newsletter name, or other source. <i>Example: utm_source=google</i></small>
Campaign Medium	<input type="text" value="email"/> <small>▲ Required. Use utm_medium to identify a medium such as email or cost-per-click <i>Example: utm_medium=cpc</i></small>
Campaign Name	<input type="text" value="happy-bday"/> <small>▲ Required. Used for keyword analysis. Use utm_campaign to identify a specific product promotion or strategic campaign. <i>Example: utm_campaign=spring_sale</i></small>
Campaign Term	<input type="text"/> <small>▲ Used for paid search. Use utm_term to note the keywords for this ad. <i>Example: utm_term=running+shoes</i></small>
Campaign Content	<input type="text"/> <small>▲ Used for A/B testing and content-targeted ads. Use utm_content to differentiate ads or links that point to the same URL. <i>Example: utm_content=logolink or utm_content=textlink</i></small>

The fields **Campaign Source**, **Campaign Medium** and **Campaign Name** are REQUIRED.

Then, click the **Schedule** tab.

Schedule

Transactional Email Amasty Follow Up Ema	Delivery Time Days: <input type="text"/> Hours: 6 Minutes: -	Coupon Type: Fixed amount discount Discount Amount: 20 More or <input type="checkbox"/> Use Shopping Cart Rule	Action <input type="button" value="X"/>
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Use the **Add Record** button to add a new line to the schedule.

After that, specify the date and time for the follow up email delivery.

Next, you need to choose the coupon type:

- Percent of product price discount;
- Fixed amount discount;
- Fixed amount discount for whole cart.

And specify the discount amount.

Instead of specifying the multiple conditions for each coupon, you can use one of the shopping cart price rules. In this case the Follow Up Email module will create coupons and add them to the rule. Each customer will receive a coupon with your letter.

When you configure the rules regarding the order statuses you can see the additional **Condition** tab. At this tab can set up different conditions for the rule implementation (this is optional).

Now, you can switch to the **Test** tab.

Edit Rule 'Birthday Greeting'

Page 1 of 3 pages | View 20 per page | Total 53 records found

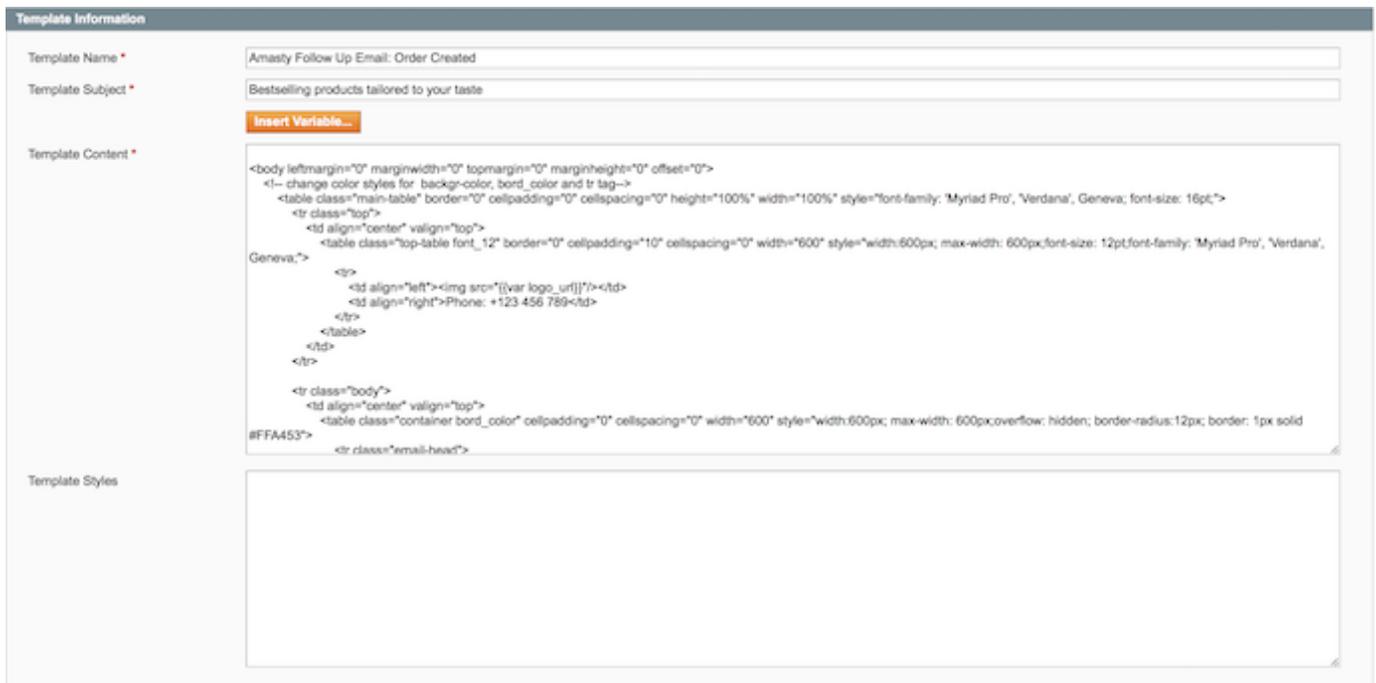
	ID	First Name	Last Name	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website
<input type="button" value="Send"/>	136	Jane	Doe	General	888-888-8888	90232	United States	California	May 16, 2013 12:20:45 AM	Main Website
<input type="button" value="Send"/>	135	John	Doe	General	888-888-8888	90232	United States	California	May 16, 2013 12:16:11 AM	Main Website
<input type="button" value="Send"/>	127	John	Smith	VIP Member	424-555-0000	90210	United States	California	May 15, 2013 12:45:10 PM	Main Website
<input type="button" value="Send"/>	104	Drew	France	VIP Member	907-555-3209	75008	France	Paris	Apr 24, 2013 11:24:51 AM	Main Website
<input type="button" value="Send"/>	103	Milo	Vitti	Private Sales Member	792-555-1202	00199	Italy		Apr 24, 2013 11:19:25 AM	

Click the Send button to send the test email. You can specify the test email recipient [here](#).

Follow Up Email Templates

To create an email template, please, go to **System → Transactional Emails** and click the **Add New Template** button.

Choose the type and language of the template. Then click the **Load Template** button.



Use format manager to choose how to display in the template:

- currency
- date
- price
- time

You can choose whether to use short/long or medium display type. Here you can see the example with date format.

Follow Up Emails History

To see the follow up email history, please, go to **Promotions → Follow Up Email → History**.

History

Page 1 of 1 pages | View 20 per page | Total 14 records found

Export to: CSV Export Reset Filter Search

ID	Rule	Order ID	Customer Name	Customer Email	Sent	Cancellation Reason	Sent At	Coupon
14	Order Created	145000006	Pavel P	pavel.panamarenka@gmail.com	No		Sep 27, 2018 7:46:46 AM	
13	Order Created	145000006	Pavel P	pavel.panamarenka@gmail.com	No		Sep 27, 2018 7:46:46 AM	
12	Birthday Greeting		Melvin Speck	melvin@example.com	No			55B8C843E2992
11	Wishlist Promotion		Percy Pella	percy@example.com	No			55B8C83D589CA
10	Product special offer	100000205	Jane Smith	janesmith@example.com	No			55B8C83721387
9	Product special offer	100000205	Jane Smith	janesmith@example.com	No			55B8C83706BA4
8	Product special offer	145000003	Jay Smith	jj@example.com	No			55B8C8363C738
7	Product special offer	145000003	Jay Smith	jj@example.com	No			55B8C8360AEC5
6	Customer winback email		Kenda Tanaka	kenda@example.com	No			55B8C7FF90945
5	Customer winback email		Milo Viti	milo@example.com	No			55B8C7FE26C77
4	Customer winback email		Jerry Luke	jerry@example.com	No			55B8C7FD912A8
3	Customer winback email		Percy Pella	percy@example.com	No			55B8C7FCDB353
2	Customer winback email		John Doe	john.doe@example.com	No			55B8C7FB894E2
1	Customer winback email		Jane Doe	janedoe@example.com	No			55B8C7FA4726

On the grid you can see if a customer didn't receive the email and the reason. Also, you are able to see all the created coupon codes and customer accounts they are tied to.

From: <https://amasty.com/docs/> - **Amasty Extensions FAQ**

Permanent link: https://amasty.com/docs/doku.php?id=magento_1:follow-up-email

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