

**amasty**

For more details see how the [Follow Up Email for Magento 2](#) extension works.

# Guide for Follow Up Email for Magento 2

Follow up orders with discount coupon for next purchase, send Birthday greetings and nay more!

- Send a message on order status change
- Greet new customers with encouraging discounts
- Do special occasion email campaigns, like Christmas or customer birtdays
- Create unique template for each email sent by extension
- Send multiple emails with different delay intervals

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## Troubleshooting checklist

### Emails are not being sent automatically

Extension is working with Magento cron jobs to schedule and send emails. If Magento cron is not configured or configured incorrectly the extension won't be sending any emails.

To solve this, please check [this article](#) to see how Maganto cron is configured.

Allow **guest RMA requests** to manage product returns and exchanges in the most efficient way.

### Can't use email template in the rule

Available templates in the **Schedule** are being filtered by the **Start Event** you have selected in the rule. In the list of templates you will see only emails created based on default Follow Up template for corresponding start event.

In the following guide we'll be creating new template for "Order Created" Start Event:

## General

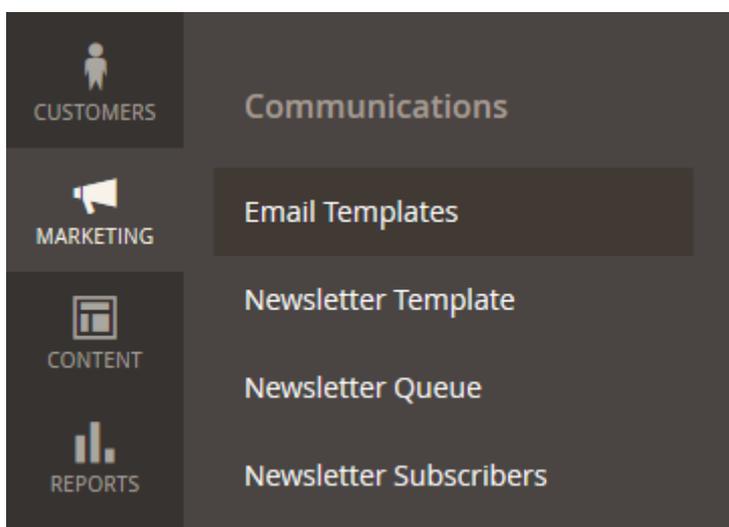
Name \* "Thank you" discount!

Start Event \* Created

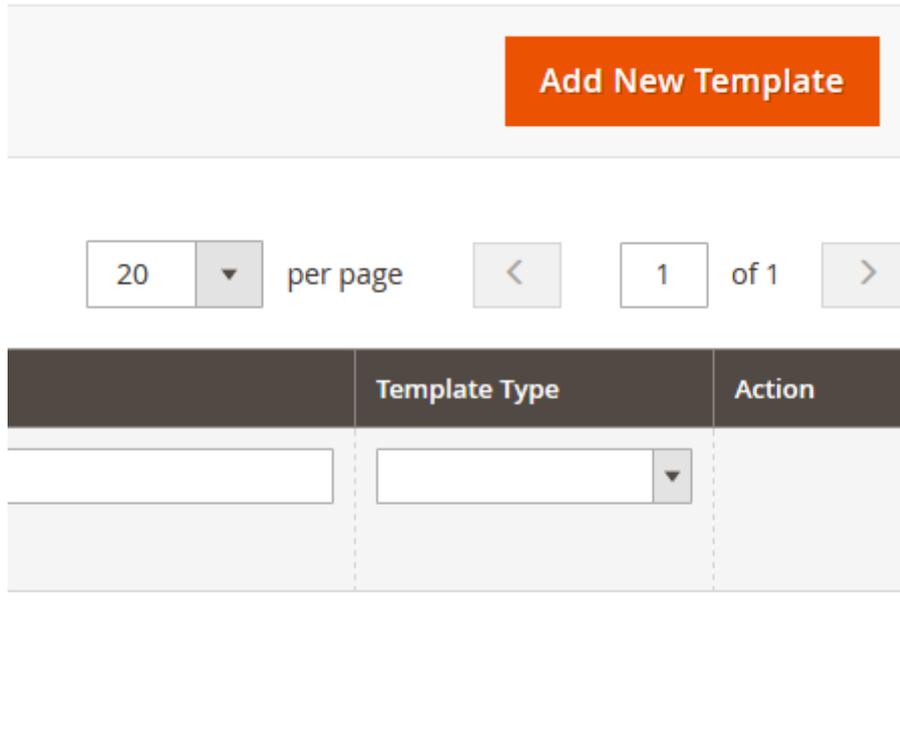
- Order**
  - Created
  - Shipped
  - Invoiced
  - Completed
  - Cancelled
- Customer**
  - No Activity
  - Changed Group
  - Subscribed to Newsletter
  - Birthday
  - Registration
- Wishlist**
  - Product Added
  - Shared
  - Wishlist on sale
  - Wishlist back in stock
- Date**
  - Date

This is how the new template is created:

- Navigate to **Marketing - Communications - Email Template** menu



- Being in **Email Templates** menu hit **Hit Add New Template** button



- In **Load default template - Template** find **Amasty Follow Up Email: Order Created**, select it and hit **Load Template**

### Load Default Template

Template \*

- Specify the new template's name and make the changes you want



## General

### General

<b>Coupon is Available Only for Email Recipient</b> <small>[global]</small>	<input type="text" value="Yes"/>
	If the option is disabled the coupon can be used by all customers.
<b>Set Winback Period</b> <small>[store view]</small>	<input type="text" value="15"/>
	In days.
<b>Set Birthday Offset</b> <small>[store view]</small>	<input type="text" value="2"/>
	Change this to trigger Customer Birthday Start Event before actual birthday date
<b>Specify Number of Days to Clean Emails History</b> <small>[global]</small>	<input type="text" value="90"/>
<b>Blacklist Email Addresses</b> <small>[global]</small>	<input type="button" value="Select CSV File"/>

- **Coupon is Available Only for Email Recipient** - when enabled, only the customer who received the email will be able to apply the coupon on the cart. If the option is set to *No*, the coupon can be used by all customers.
- **Set Winback Period** - specify the period in days after which customer will be considered not active. Used for **Customer - No Activity** start event.
- **Set Birthday Offset** - if you want to trigger **Birthday** start event before the actual birthday date, you can set the offset in days in this setting.
- **Specify Number of Days to Clean Emails History** - enable the option to automatically remove records from the 'history' table, which are older then the number of days specified.
- **Blacklist Email Addresses** - here you can import CSV with blacklisted email addresses.

## Email Templates

## Email Templates

**Sender Name**  
[store view]

**Sender Email**  
[store view]

**Send Follow Up Email Copy to**  
[store view]

**Header Template**  
[global]

**Footer Template**  
[global]

- **Sender Name** - value provided here will be inserted in **From - Name** field of the follow up email.
- **Sender Email** - same as the setting above, but for **From - Email** field.
- **Send Follow Up Email Copy to** - a copy of every follow up email will be sent to the addressees provided here.
- **Header/Footer Template** - templates for header and footer parts of follow up emails.

## Testing

## Testing

**Safe Mode**  
[global]

When safe mode is activated, the extension sends emails only to the test email, **nothing will be sent to customers**

**Test Email**  
[global]

- **Safe Mode** - when enabled, all emails will be sent to address provided in the setting below. *Nothing will be sent to customers.*
- **Test Email** - email address for send test emails to.

## Cronjob Information

### Cronjob Information

Current Time 2021-10-12 07:27:07

#### Cron (Last 5)

amasty_amfollowup_history	pending	2020-02-12 11:23:12

**Cronjob information** - see the information on the 5 latest cron jobs.

# How to create Rules for the Follow Up emails

Rules can be created at **Marketing** → **Follow Up Email** → **Rules** → hit the button '**Create New Rule**'

Here we should **name** our rule and select one of the available **events** which would trigger the rule.

## New Rule

 admin ▾

← Back

Reset

Continue

General 

### General

Name \*

Start Event \*

- Order**
- Created
- Shipped
- Invoiced
- Completed
- Cancelled
- Customer**
- No Activity
- Changed Group
- Subscribed to Newsletter
- Birthday
- Registration
- Wishlist**
- Product Added
- Shared
- Wishlist on sale
- Wishlist back in stock
- Date**
- Date

### General

# Rule Example

← Back   Delete   Reset   Save and Continue Edit   **Save**

✓ You saved the rule.

**General**

---

**Name \***

**Start Event \***  ▼

**Cancel Event**

Customer logged in

New Order Placed

Customer clicked on a link in the email

Customer wishlist shared

Order Becomes: Canceled

Order Becomes: Closed

Order Becomes: Complete

Order Becomes: Processing

**Status**  ▼

- **Name** - name of the Follow Up rule.
- **Start Event** - event which starts email sending routine.
- **Cancel Event** - here you can set the event which will cancel further emails from being sent to a customer. For example, with **Order Becomes: Canceled** Cancel Event enabled, if rule is configured to send three emails but if order was cancelled after the customer got the first email, two other emails will not be sent to a customer anymore.

Please note that list of available Cancel Events depends on Start Event you are using. For example, order status related Cancel Events will be available only for order status related Start Events.

- **Send to Newsletter Subscribers Only** - when enabled, Follow Up rule will work only for customers who subscribed to newsletter email.
- **Status** - enables and disables the rule.

## Stores & Customer Groups

# Rule Example

← Back   Delete   Reset   Save and Continue Edit   **Save**

✓ You saved the rule.

- General
- Stores & Customer Groups** ✎
- Sender Details
- Google Analytics
- Schedule
- Conditions
- Orders

### Stores & Customer Groups

#### Stores

**Main Website**  
**Main Website Store**  
Default Store View

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

#### Customer Groups

**NOT LOGGED IN**  
General  
Wholesale  
Retailer

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

- **Stores** - limits the stores where the rule will be applied. If nothing is selected, rule will be applied to all stores.
- **Customer Groups** - controls on which customer groups the rule will be applied. If nothing is selected, rule will be applied to all groups.

## Sender Details

# Rule Example

← Back   Delete   Reset   Save and Continue Edit   **Save**

✓ You saved the rule.

- General
- Stores & Customer Groups
- Sender Details**
- Google Analytics
- Schedule
- Conditions
- Orders

### Sender Details

Name

Email

Send Copy of Emails to

Here you can set the details which will be put into 'From' fields of the email. These settings when set

will overwrite same [general settings](#) of the extension.

## Google Analytics

# Rule Example

← Back

Delete

Reset

Save and Continue Edit

Save

✓ You saved the rule.

- General
- Stores & Customer Groups
- Sender Details
- Google Analytics**
- Schedule
- Conditions
- Orders

## Google Analytics

Campaign Source

**Required.** Use **utm\_source** to identify a search engine, newsletter name, or other source.  
*Example:*

Campaign Medium

**Required.** Use **utm\_medium** to identify a medium such as email or cost-per-click.  
*Example:*

Campaign Content

Used for A/B testing and content-targeted ads. Use **utm\_content** to differentiate ads or links that point to the same URL.  
*Example:* utm\_content=logolink or utm\_content=textlink

Campaign Term

Used for paid search. Use **utm\_term** to note the keywords for this ad.  
*Example:* utm\_term=running+shoes

Campaign Name

**Required.** Used for keyword analysis. Use **utm\_campaign** to identify a specific product promotion or strategic campaign.  
*Example:*

Here you can set Google Analytics parameters which will be added to the links in your follow up

emails. Please check the [Google Analytics help articles](#) for more details.

## Schedule

Transactional Email	Delivery Time	Coupon	Action
<input type="text" value="Amas"/>	Days <input type="text" value="2"/>	Type <input type="text" value="Fixed amount discount"/>	
	Hours <input type="text" value="1"/>	Discount Amount <input type="text" value="10"/>	
	Minutes <input type="text" value="5"/>	<a href="#">Collapse ^</a>	
		Expired in (days) <input type="text" value="7"/>	
		Maximum Qty Discount is Applied To <input type="text" value="3"/>	
		Discount Qty Step (Buy X) <input type="text" value="2"/>	
		<input type="checkbox"/> Use Shopping Cart Rule	

**Add Record**

- **Transactional Email** - email template used. If you want to add your own template please [check here](#) how it can be done.
- **Delivery Time** - determines the interval between the event you've selected for this rule and the email to be sent.
- **Coupon** - here you can configure the promotion for the follow-up emails. When an email is sent, a new promotion rule with coupon code will be generated in the Cart Price Rules menu, and the coupon from this rule will be put into an email.
- **Use Shopping Cart Rule** - works similarly to the setting above, but instead of creating a new promo rule for each coupon it will put the coupon in the existing rule. With this feature, you can configure a rule with complex conditions and use it for your abandoned cart promotions.

Please note that the 'Use Auto Generation' option in the promotion rule has to be enabled for this rule to appear in the list.

## Conditions

# Rule Example

← Back
Delete
Reset
Save and Continue Edit
Save

✓ You saved the rule.

- General
- Stores & Customer Groups
- Sender Details
- Google Analytics
- Schedule
- Conditions**
- Orders

### Conditions

Apply the rule only if the following conditions are met (leave blank for all products)

If ALL of these conditions are TRUE :

Please choose a condition to add. 

- Please choose a condition to add.
- Product attribute combination
- Products subselection
- Conditions combination
- Cart Attribute**
- Subtotal (Excl. Tax)
- Subtotal (Incl. Tax)
- Subtotal
- Total Items Quantity
- Total Weight
- Payment Method
- Shipping Method
- Shipping Postcode
- Shipping Region
- Shipping State/Province
- Shipping Country

- **Condition tree** - if there are some conditions, the rule will activate only when conditions are met. Of there are no conditions set, the rule will be active all the time.

Please note that Conditions tab will be available only for order-related Start Events like Order Created

## Orders/Customers

In this tab, all matched orders or customers (depending on the start event chosen) are shown. You

can send test emails if needed.

Orders

2 records found

20 per page 1 of 1

	Order #	Purchased From (Store)	Purchased On	Bill to Name	Ship to Name	Email	G.T. (Base)	G.T. (Purchased)	Status
<a href="#">Send Test Email</a> to marketing@example.com	000000001	Main Website Main Website Store Default Store View	Jun 1, 2016 8:24:32 AM	Veronica Costello	Veronica Costello	roni_cost@example.com	\$34.00	\$34.00	Processing
<a href="#">Send Test Email</a> to marketing@example.com	000000002	Main Website Main Website Store Default Store View	Jun 1, 2016 8:24:34 AM	Veronica Costello	Veronica Costello	roni_cost@example.com	\$37.00	\$37.00	Complete

Keep in mind, that test emails work only in case the Safe Mode is enabled and a test email is provided. If no, you'll be able to add emails to queue only.

2 records found



	Order #	Purchased From
<a href="#">Add to Queue</a>	000000001	Main Website Main Website S Default Store
<a href="#">Add to Queue</a>	000000002	Main Website Main Website S Default Store

## Campaigns Statistics

You can track the performance of each campaign in a separate grid. Navigate to **Marketing → Follow Up Email → Follow Up Campaigns Statistics**.

# Follow Up Campaigns Statistics

Filters

7 records found

20 per page 1 of 1

Campaign	Sent	Opened	Open Rate	Clicked	Click Rate
Customer winback email	50	38	76%	24	48%
Birthday Greeting	25	17	68%	9	36%
Wishlist Promotion	36	8	22%	4	11%
Offer with cross-selling products	74	56	76%	29	39%
Customer is moved to other group	12	4	33%	0	0%
Holiday Coupon	30	28	93%	25	83%
Wishlist on sale	0	0	0%	0	0%

Here you can see the statistics of sent, opened and clicked emails for all campaigns.

Additionally, filter the campaigns by any of the available parameters.

# Follow Up Campaigns Statistics

Filters

**Sent** from  to   
**Opened** from  to   
**Open Rate** from  to   
**Clicked** from  to   
**Click Rate** from  to   
**Campaign**

Cancel Apply Filters

# Usage examples

## Christmas sale

Imagine the situation that you are going to hold a great Christmas sale. To keep more customers informed about the event, you can send them follow up emails, containing the corresponding information.

To make this happen we will have to complete two steps:

- to create the follow up email template;
- to set up a follow up rule with the template created.

Step 1. To create the mentioned email template, go to **Marketing > Communications > Email Templates > Add New Template** button.

Considering that we’re going to send notifications about the upcoming Christmas sale to those customers, who will complete orders, during the specified period, load order-related template 'Amasty Follow Up Email: Order Completed modern Christmas theme I' and specify its name and subject in the corresponding fields:

### Load default template

Template  ▼

### Template Information

Template Name \*

Template Subject \*

In the **Template Content** field, you can make adjustments to the text and style of the email template. Find the code starting with “layout”.

Template Content \*

```
</table>
</td>
</tr>

<tr class="email-body">
  <td>
    {{layout
      handle="amfollowup_email_crosssell"
      quote=$quote
      history=$history
      mode=list
      image=yes
      price=yes
      priceFormat=exculdeTax
      descriptionFormat=short
      discount=yes
    }}<br/>
  </td>
</tr>
</table>
{{template config_path="amfollowup/emails/footer_template"}}
```

In the layout settings, you can configure the content and style of the product list that is included in the follow-up email.

The **handle** setting can have one of the following values:

- **amfollowup\_email\_quote** helps to show the list of ordered items;
- **amfollowup\_email\_crosssell** includes cross-sell products related to those ordered;
- **amfollowup\_email\_upsell** displays relevant upsell products;
- **amfollowup\_email\_related** is used to show Related products.

The **mode** defines the appearance of the product list. Starting version 1.2.0, this setting has 4 possible configurations:

- **table;**
- **list;**
- **table\_modern;**
- **list\_modern.**

The **image** in its turn adds pictures to products. Choose:

- **yes** to include images;
- **no** to omit them.

The **priceFormat** is used to show either prices with taxes (=includeTax) or excluding taxes (=exculdeTax).

The **descriptionFormat** is responsible for the format of the product description. Type in:

- **short** to display a Short description;
- **full** to show a full Description;
- **no** to provide no description at all.

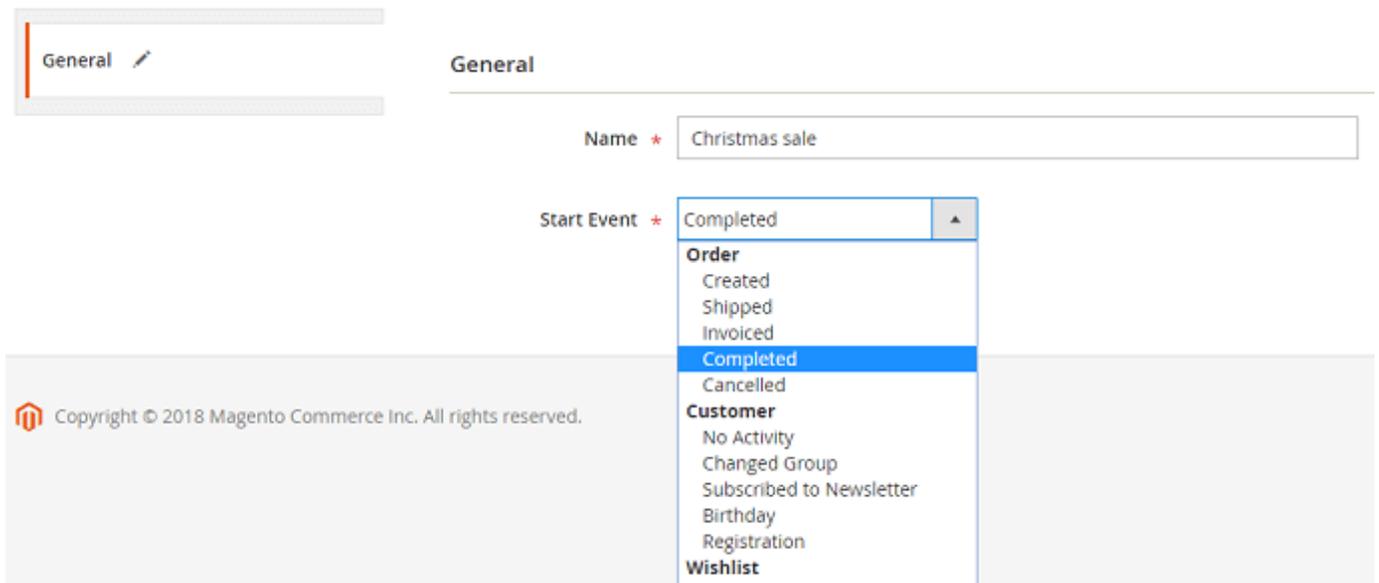
The **discount** deals with prices in the follow-up email. Here, use:

- **yes** to include both prices with and without discounts;
- **no** to show only prices without discounts.

Step 2. To create a rule, go to **Marketing > Follow Up > Rules** and hit the **Create New Rule** button.

Specify the name of the rule in the Name field and choose the necessary start event in the Start Event field.

To send emails to the customers, who have completed orders, select the Order Completed start event:



The screenshot shows the 'General' tab of the Magento 2 rule configuration interface. The 'Name' field contains 'Christmas sale'. The 'Start Event' dropdown menu is open, displaying a list of events. Under the 'Order' category, the 'Completed' event is selected and highlighted in blue. Other events listed include 'Created', 'Shipped', 'Invoiced', and 'Cancelled'. Under the 'Customer' category, events include 'No Activity', 'Changed Group', 'Subscribed to Newsletter', 'Birthday', and 'Registration'. The 'Wishlist' category is also visible at the bottom of the dropdown. In the bottom left corner, there is a copyright notice: 'Copyright © 2018 Magento Commerce Inc. All rights reserved.'

You can also set up one or more Cancel Conditions on the **General** tab, that will block the emails sending (if several notifications are going to be sent to customers). Since we're not going to barrage customers with emails and send only one notification, there is no need to set up Cancel Condition.

The last action to do is to define the schedule of emails sending:

## Schedule

Transactional Email	Delivery Time	Coupon
<input type="text" value="Christmas sale"/>	<p>Days <input type="text"/></p> <p>Hours <input type="text" value="1"/></p> <p>Minutes <input type="text" value="-"/></p>	<p>Type <input type="text" value="Percent of product pric"/></p> <p>Discount Amount <input type="text" value="10"/></p> <p><a href="#">Expand</a></p> <p><input type="checkbox"/> Use Shopping Cart Rule</p>
<input type="button" value="Add Record"/>		

Choose the template's name you've created on the first step in the **Transactional Email field**, specify the exact **Delivery Time** and determine the kind of discount to be applied to the products in the list, if needed.

If you want to send more notifications, click to the **Add Record** button and specify the necessary details for each additional notification to be sent. As a result, the number of specified notifications will be sent to relevant customers according to the schedule.

### Schedule

Transactional Email	Delivery Time	Coupon	Action
<input type="text" value="Christmas sale."/> ▼	Days <input type="text"/>	Type <input type="text" value="Percent of product pric"/> ▼	
	Hours <input type="text" value="1"/> ▼	Discount Amount <input type="text" value="10"/>	
	Minutes <input type="text" value="-"/> ▼	<a href="#">Expand</a> ▼ <input type="checkbox"/> Use Shopping Cart Rule	
<input type="text" value="Amasty Follow Up En"/> ▼	Days <input type="text"/>	Type <input type="text" value="None"/> ▼	
	Hours <input type="text" value="-"/> ▼	Discount Amount <input type="text"/>	
	Minutes <input type="text" value="5"/> ▼	<a href="#">Expand</a> ▼ <input type="checkbox"/> Use Shopping Cart Rule	
<input type="button" value="Add Record"/>			

Here's the sample of a letter the customers will receive:

owner@example.com

Reply to this mail

## Dear Veronica Costello !

We know this is a busy time of year, but let us draw your mind from the fuss for a second.

We've just launched our CHRISTMAS SALE!

So, hurry up to spoil yourself with new purchases in the year ending.

And good luck in the coming year!

As always, thank you for your business and the confidence you have placed in us!



### Wayfarer Messenger Bag

~~\$45.00~~

**\$40.50**

[View Item](#)



### Rival Field Messenger

~~\$45.00~~

**\$40.50**

[View Item](#)



### Complete Track Tote

~~\$32.00~~

**\$28.80**

[View Item](#)



### Savy Shoulder Tote

~~\$32.00~~

**\$28.80**

[View Item](#)

[Visit Our Store](#)

## Cron Tasks List

Magento 2 Follow Up Email extension is preintegrated with Cron Tasks List to provide store owners with an opportunity to track and manage all cron tasks running in the website background.

To view all scheduled and executed cron tasks, go to **System → Cron Tasks List**

Run all cron tasks and generate their schedule by clicking the 'Run Cron' button. Also you can delete separate tasks in bulk, apply filtering and sorting options when it is needed.

### Cron Tasks List

[Run Cron](#)

i Last Cron Activity: 20 seconds ago

Filters | Default View | Columns

Actions | 652 records found | 20 per page | 1 of 33

ID	Job Code	Status	Created At	Scheduled At	Executed At	Finished At
<input type="checkbox"/>	1038	sales_grid_order_shipment	<span style="background-color: #27ae60; color: white; padding: 2px;">SUCCESS</span>	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1058	sales_grid_creditmemo_async	<span style="background-color: #27ae60; color: white; padding: 2px;">SUCCESS</span>	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1078	sales_send_order_emails	<span style="background-color: #27ae60; color: white; padding: 2px;">SUCCESS</span>	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1098	sales_order_invoice_emails	<span style="background-color: #27ae60; color: white; padding: 2px;">SUCCESS</span>	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1118	sales_send_order_shipment	<span style="background-color: #27ae60; color: white; padding: 2px;">SUCCESS</span>	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1196	indexer_reindex_all_invalid	<span style="background-color: #27ae60; color: white; padding: 2px;">SUCCESS</span>	Mar 18, 2019 5:47:13 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:21 AM
<input type="checkbox"/>	1200	indexer_update_all_views	<span style="background-color: #e74c3c; color: white; padding: 2px;">MISSED</span>	Mar 18, 2019 5:47:13 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:21 AM
<input type="checkbox"/>	1018	sales_grid_order_invoice_async	<span style="background-color: #27ae60; color: white; padding: 2px;">SUCCESS</span>	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:47:00 AM	Mar 18, 2019 5:47:20 AM
<input type="checkbox"/>	1024	sales_grid_order_invoice_async	<span style="background-color: #e74c3c; color: white; padding: 2px;">PENDING</span>	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:53:00 AM	
<input type="checkbox"/>	1025	sales_grid_order_invoice_async	<span style="background-color: #e74c3c; color: white; padding: 2px;">PENDING</span>	Mar 18, 2019 5:47:11 AM	Mar 18, 2019 5:54:00 AM	

Find out how to install the Follow Up Email extension via [Composer](#).

From:

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

Permanent link:

[https://amasty.com/docs/doku.php?id=magento\\_2:follow-up-email](https://amasty.com/docs/doku.php?id=magento_2:follow-up-email)

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