

Follow Up Email



Magento Extension User Guide

Official extension page: [Follow Up Email](#)



User Guide: [Follow Up Email](#)

Support: <http://amasty.com/contacts/>

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[Find out more about how to set up follow up e-mails using customer segments in our blog](#)



You can find these settings when opening:
Admin Panel > System > Configuration > Amasty Extensions > Follow Up Email

The screenshot shows the 'Follow Up Email' configuration page. On the left is a navigation sidebar with 'Configuration' and 'AMASTY EXTENSIONS' (including 'Customers Segmentation' and 'Follow Up Email'). The main content area is titled 'Follow Up Email' and has a 'Save Config' button. Under the 'General' tab, there are three settings: 'Winback Period' (30 days, [STORE VIEW]), 'The coupon is available only for particular customer' (No, [GLOBAL]), and 'Automatically remove sent emails from History' (In 180 days). Two callouts provide instructions: one for the Winback Period and another for the 'The coupon is available only for particular customer' setting.

If you want to send winback emails to customers who have not visited store for some time you need to specify the period of customer absence (in days).

Set this option to 'Yes' if you want to make the coupon available only for the email recipient.



Follow Up Email

Save Config

General

Winback Period: [STORE VIEW]
▲ in days

The coupon is available only for particular customer: [GLOBAL]
▲ If the option is disabled the coupon can be used by all customers.

Automatically remove sent emails from History: [STORE VIEW]
No
In 30 days
In 90 days
In 180 days
In 360 days

Order Statuses

Sender Details

Import Blacklist

Testing

Automatic history cleaning allows you to save time and free up some space by removing your sent emails after some period of time. Now you do not have to do this manually.



Current Configuration Scope:
Default Config

Configuration

- AMASTY EXTENSIONS
- Customers Segmentation
- Follow Up Email**

Follow Up Email

Save Config

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]

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]

The extension allows you to send promo follow up emails for different order statuses. In this tab you can easily associate default Magento statuses with real events.



1. Follow Up Email configuration

The screenshot shows the configuration page for the Follow Up Email extension. On the left, there is a sidebar with a 'Configuration' section containing 'AMASTY EXTENSIONS' and 'Follow Up Email'. The main content area is divided into three sections: 'Sender Details', 'Import Blacklist', and 'Testing'. Callouts provide instructions for each section.

Sender Details

Sender Name	Customer Service	[STORE VIEW]
Sender Email	service@example.com	[STORE VIEW]
Sends copy of emails to	marketing@example.com	[STORE VIEW]

Import Blacklist

CSV File No file selected
▲ One email per line

Testing

Safe Mode	Yes	[GLOBAL]
▲ When safe mode is activated, the extension sends emails only to the test email, nothing will be sent to customers		
Recipient Email	support@example.com	[GLOBAL]

Callouts:

- In this tab you can specify the required sender details.** (Points to the Sender Details section)
- To import black list you need to create CSV file with certain emails (one email per line) and upload it through this button. If you want to enter emails manually, please open: Admin Panel > Promotions > Follow Up Email > Black List** (Points to the Import Blacklist section)
- Set this option to 'Yes' if you want to prevent email sending to customers during email testing.** (Points to the Safe Mode dropdown)
- Specify an email address where test emails will be send to.** (Points to the Recipient Email field)



2. Rule creation: Start Event

To create a rule for generation and dispatch of follow up emails, please open: Admin Panel > Promotions > Follow Up Email > Rules

Rule Configuration

General

New Rule

Specify the name of email campaign.

Back Reset

General

Name *

Start Event

Created



Continue

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

Choose the event which would start your email campaign.

After you've set up the required data, please click the 'Continue' button.

You can set a specific date when emails should be sent out. This feature is useful at holiday period.



User Guide: [Follow Up Email](#)

Support: <http://amasty.com/contacts/>

Rule Configuration

General

Stores & Customer Groups

Sender Details

Google Analytics

Schedule

Test

Edit Rule `Christmas special with coupon`

[Back](#) [Reset](#) [Delete](#) [Save](#) [Save and Continue Edit](#)

General

Name *

Start Event

Date *

Cancel Event

You can select the event which cancels email dispatch.

If you selected 'Date' as a start event, you can specify it here.

Set this option to 'No' if you want to send emails to all registered customers.

If there is a need you can easily deactivate the rule.

Send to Newsletter Subscribers Only

Is Active



Rule Configuration

- General
- Stores & Customer Groups**
- Sender Details
- Google Analytics
- Schedule
- Condition
- Test

These settings allow you to specify a store and a customer group to which the rule will be applied.

Edit Rule `Cross-selling` Back Reset Delete Save Save and Continue Edit

Apply In

Stores

- Main Website
- Main Store
- English
- French
- German

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

Apply For

Customer Groups

- NOT LOGGED IN
- General
- Wholesale
- Retailer
- QAAAA

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



Rule Configuration

General

Stores & Customer Groups

Sender Details

Google Analytics

Schedule

Test

Edit Rule 'Winback Email'

Back

Reset

Delete

Save

Save and Continue Edit

Sender Details

Name

Sales Department

Email

sales@example.com

Sends copy of emails to

support@example.com

In this tab you can specify sender details which will be used only for this rule.



User Guide: [Follow Up Email](#)

Support: <http://amasty.com/contacts/>

New Rule Back Reset Delete Save Save and Continue Edit

Google Analytics

Campaign Source	<input type="text" value="google"/> ▲ Required. Use utm_source to identify a search engine, newsletter name, or other source. <i>Example: utm_source=google</i>
Campaign Medium	<input type="text" value="cpc"/> ▲ Required. Use utm_medium to identify a medium such as email or cost-per-click. <i>Example: utm_medium=cpc</i>
Campaign Term	<input type="text" value="running+shoes"/> ▲ Used for paid search. Use utm_term to note the keywords for this ad. <i>Example: utm_term=running+shoes</i>
Campaign Content	<input type="text" value="logolink"/> ▲ 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>
Campaign Name	<input type="text" value="spring_sale"/> ▲ Used for keyword analysis. Use utm_campaign to identify a specific product promotion or strategic campaign. <i>Example: utm_campaign=spring_sale</i>

These settings allow you to get Google Analytics statistics on your email campaign.

NOTE: the fields Campaign Source, Campaign Medium and Campaign Name are **REQUIRED**.

The information will be accessible under campaigns in you GA account.



2. Rule creation: Email Schedule

Dashboard Sales Catalog Mobile Customers **Promotions** Newsletter CMS Reports System

Rule Configuration

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

Edit Rule `No activity reminder` [Back] [Reset] [dit]

Schedule

Transactional Email	Delivery Time	Coupon	Action
Amasty Follow Up Email ▼	Days: 7 Hours: - ▼ Minutes: - ▼	Type: Fixed amount discount ▼ Discount Amount: 10 More or <input type="checkbox"/> Use Shopping Cart Rule	[✕]
Amasty Follow Up Email ▼	Days: 35 Hours: - ▼ Minutes: - ▼	Type: Fixed amount discount for whole cart ▼ Discount Amount: 5 More or <input type="checkbox"/> Use Shopping Cart Rule	[✕]

[+ Add Record]

Choose the coupon type:
- Percent of product price discount;
- Fixed amount discount;
- Fixed amount discount for whole cart.

Select the delivery date of follow up emails.

Specify the discount amount

If you want to send the email several times, please click this button and set up the appropriate data.



2. Rule creation: Applying Shopping Cart Rules

Edit Rule `Christmas special with coupon`

[Back](#) [Reset](#) [Delete](#) [Save](#) [Save and Continue Edit](#)

Schedule			
Transactional Email	Delivery Time	Coupon	Action
Amasty Follow Up Email ▼	Days: - ▼ Hours: - ▼ Minutes: - ▼	Type: -- None -- ▼ Discount Amount: 0 More or <input checked="" type="checkbox"/> Use Shopping Cart Rule Christmas special ▼ Rule option 'Use Auto Generation' should be turned on	✕

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



Rule Configuration

General
Stores & Customer Groups
Sender Details
Google Analytics
Schedule
Condition
Test

When you configure the rules regarding order statuses you can see the additional tab 'Condition'.

Edit Rule `PC Promotion`

[Back](#) [Reset](#) [Delete](#) [Save](#) [Save and Continue Edit](#)

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

If **ALL** of these conditions are **TRUE** :

If **total quantity greater than 2** for a subselection of items in cart matching **ALL** of these conditions: ✖

Brand **is Apple** ✖

Category **is 55291** ✖



At this tab you're able to set up different conditions for rule implementation (this is optional).



Rule Configuration

- General
- Stores & Customer Groups
- Sender Details
- Google Analytics
- Schedule
- Segments**
- Test

Advanced Customer Segments module adds new rule condition named 'Segments'.

Edit Rule 'Newsletter Subscription'

Back Reset Delete Save Save and Continue Edit

Segment

Segments	<ul style="list-style-type: none">Viewed ProductsCustomers from LondonCustomer group is GeneralProducts Count in Cart10 days after cart creationCustomer has 3 and more ordersOrdered particular productsTotal sales amount is greater than 10005 days from first completed orderCustomers, last visited more than 30 days ago
----------	--

Choose a segment or a group of segments to which the rule will be applied.
Notice: segments should be created separately.



Edit Rule `Product promotion`

[Back](#) [Reset](#) [Delete](#) [Save](#) [Save and Continue Edit](#)

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

[Reset Filter](#) [Search](#)

	Order #	Purchased From (Store)	Purchased On	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status
	<input type="text"/>	<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>
Send to <i>support@example.com</i>	100000001	Main Website Main Store English	Sep 12, 2014 3:02:21 AM	Dany Smith	\$2,704.99	\$2,704.99	Pending

Click this button to send test email. To specify receiver email, please open:
Admin Panel > System > Configuration > Amasty Extensions > Follow Up Email > Testing.



3. Follow up email templates

To create an email template please go to System-> Transactional Emails

Transactional Emails

Click here to add a new template.

+ Add New Template

Page 1 of 1 pages | View 20 per page | Total 12 records found

Reset Filter Search

ID	Template Name	Date Added	Date Updated	Subject	Template Type	Action
		From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	
1	Amasty Follow Up Email: Order Created		Sep 11, 2014 2:46:18 AM	Bestselling products tailored to your taste	HTML	Preview
2	Amasty Follow Up Email: Order Shipped		Sep 11, 2014 2:46:18 AM	Bestselling products tailored to your taste	HTML	Preview
3	Amasty Follow Up Email: Order Invoiced		Sep 11, 2014 2:46:18 AM	Bestselling products tailored to your taste	HTML	Preview
4	Amasty Follow Up Email: Order Completed		Sep 11, 2014 2:46:18 AM	Bestselling products tailored to your taste	HTML	Preview
5	Amasty Follow Up Email: Order Cancelled		Sep 11, 2014 2:46:18 AM	Bestselling products tailored to your taste	HTML	Preview
6	Amasty Follow Up Email: Customer Changed Group		Sep 11, 2014 2:46:18 AM	You've become a VIP customer!	HTML	Preview
7	Amasty Follow Up Email: Customer Birthday		Sep 11, 2014 2:46:18 AM	Happy Birthday!	HTML	Preview
8	Amasty Follow Up Email: Customer Registration		Sep 11, 2014 2:46:18 AM	Visit {{var store.getFrontendName()}} and get the bonus!	HTML	Preview
9	Amasty Follow Up Email: Customer Subscribed to Newsletter		Sep 11, 2014 2:46:18 AM	{{var store.getFrontendName()}} subscription poll	HTML	Preview
10	Amasty Follow Up Email: Customer No Activity		Sep 11, 2014 2:46:18 AM	Come to {{var store.getFrontendName()}} and save up to 20%	HTML	Preview



User Guide: [Follow Up Email](#)

Support: <http://amasty.com/contacts/>

3. Follow up email templates

Rule Configuration

General

Name the rule and choose the start event.

New Rule

Back Reset

General

Name *

Start Event

Rule Configuration

- General
- Stores & Customer Groups
- Sender Details
- Google Analytics

Schedule

- Condition
- Test

Edit Rule `Order Create`

Back Reset Delete Save Save and Continue Edit

Schedule

Transactional Email	Coupon	Action
<input type="button" value="Add Record"/>		

Choose 'Schedule' tab and click 'Add record'.

Edit Rule `Order Create`

Back Reset Delete Save Save and Continue Edit

Schedule

Transactional Email	Delivery Time	Coupon	Action
Amasty Follow Up Email	Days: - Hours: - Minutes: -		<input type="button" value="X"/>
<input type="button" value="Add Record"/>			

Select the necessary email template from the drop-down.
Important! First you should create email template (see pages 17-20) and only then configure the rule.



3. Follow up email templates

New Email Template

[Back](#)[Reset](#)[Convert to Plain Text](#)[Preview Template](#)[Save Template](#)

Load default template

Template *

Locale *

[Load Template](#)

Choose the type and language for the template. Then click 'Load Template'.

Template Information

Template Name *

Template Subject *

[Insert Variable...](#)

Template Content *

```
    }}<br/>
  </td>
</tr>
</table>
</td>
</tr>

<tr class="footer">
  <td align="center" valign="top">
    <table border="0" cellpadding="20" cellspacing="0" width="600" style="width:600px; max-width: 600px;">
      <tr>
        <td align="center" valign="top" class="font_14" style="font-size: 14pt; font-family: 'Myriad Pro', 'Verdana', Geneva;">
          Delivered by CompanyName, Street 123, City |Telephone | support@company.com <a href="{{var
urmanager.mageUrl("amfollowupfront/main/unsubscribe')}}" style="color:#FFA453;">Unsubscribe</a>
        </td>
      </tr>
    </table>
  </td>
</tr>
```

Use URL manager to automatically create URLs corresponding to Magento requirements.



User Guide: [Follow Up Email](#)

Support: <http://amasty.com/contacts/>

3. Follow up email templates

Edit Email Template

[Back](#) [Reset](#) [Delete Template](#) [Convert to Plain Text](#) [Preview Template](#) [Save Template](#)

Template Information

Template Name *

Template Subject *

[Insert Variable...](#)

Template Content *

```
#FFA453; max-height: 76px;"><div style="height: 76px;max-height: 76px;"></div></td>
</tr>
<tr>
<td class="head" style="padding: 10px 20px 10px 20px;font-family: 'Myriad Pro', 'Verdana',
Geneva;">
<span style="font-size: 18pt;">Hello {{var customer.getName()}}.</span><br/><br/>
Since you registered with {{var store.getFrontendName()}} on {{var formatmanager.formatDate("customer,
created_at, long)}} you haven's purchased any products yet. We invite you to visit our store and choose any items
you like with a 20% discount. To get the discount use the <span style="border: 1px solid #E0E0E0; background-
color: #f9f9f9;">{{var history.getCouponCode()}}</span> promo-code. <br/><br/>
Happy shopping!
</td>
</tr>
<tr >
<td align="center" valign="top" class="head" style="padding: 10px 20px 10px 20px;">
```

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.

Template Styles



If you want to add an email address to black list, please open:
Admin Panel > Promotions > Follow Up Email > Black List
Note: if you want to quickly add a whole black list, please import it through CSV file, as shown at the [Page 4](#).

Please click the 'Add New' button to add the email address.

Black List [+ Add New](#)

Page of 1 pages | View per page | Total 6 records found [Reset Filter](#) [Search](#)

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions [Submit](#)

	ID ↓	Email
Any ▼	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	6	josh.goody@example.com
<input type="checkbox"/>	5	jimm@example.com
<input type="checkbox"/>	4	rian.brown@example.com
<input type="checkbox"/>	3	alexa.clark@example.com
<input type="checkbox"/>	2	angela.lewis@example.com
<input type="checkbox"/>	1	frank.wilson@example.com

Blocked Recipient [← Back](#) [Reset](#) [✓ Save](#)

Recipient

Email *

As a next step, manually enter the email address.



To see all sent emails, please open: **Admin Panel > Promotions > Follow Up Email > History.**

Click this button to export all email history into CSV file.

History

Page 1 of 1 pages | View 20 per page | Total 10 records found

Export to: CSV **Export** **Reset Filter** **Search**

ID	Rule	Order ID	Customer Name	Customer Email	Sent	Cancellation Reason	Sent At	Coupon	Coupon Used
							From: To:		
10	Birthday Greeting		Richard Wilson	r.wilson@example.com	No			54169E4AEAB2E	No
9	Customer Registration		Richard Wilson	r.wilson@example.com	No			54169DDEE68E7	No
8	Newsletter Subscription		Frank Smith	frank.smith@example.com	No			54169BBB8D3FB	No
7	Wishlist Promotion		Frank Smith	frank.smith@example.com	No			54169B750AAE0	No
6	Customer Registration		Frank Smith	frank.smith@example.com	No			54169B14C886C	No
5	Wishlist Promotion		Jack Nilson	jack.nilson@example.com	No			54169A685A60E	No
4	Customer Registration		Jack Nilson	jack.nilson@example.com	No			5416984D78C1C	No

If a customer didn't receive the email you're able to see the reason.

Here you can see all generated coupons tied to customers.



Thank you!

Should you have any questions or feature suggestions, please contact us at:

<http://amasty.com/contacts/>

Your feedback is absolutely welcome!



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