# 2. Abandoned Cart Email User Guide

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to send us an email at supp ort@magenest.com

By Magenest | Support: http://servicedesk.izysync.com/servicedesk/customer/portal/44

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## Introduction

Magento 2 Abandoned Cart Email extension is a powerful extension that allows merchants to remind customers about their abandoned cart, which has been selected and left without being paid on the store, via email or SMS. This is a necessary solution to enhance customer service and remind customers to come back for purchasing. Moreover, it enables merchants to get closer to customers as well as recover lost revenue for the business.



## Feature list

- Set the time to consider the cart as abandoned
- Create a range of campaigns with flexible rules
- Generate coupons to encourage customers to recover their carts
- Manage Blacklist and unsubscribers
- Manage Notification Log
- Track Abandoned Cart and Email Campaign statistics
- Apply automatic coupons for different emails & SMS
- Integrate Google Analytics Campaign
- Log Cron jobs
- Four available email templates
- Insert variables in email template and preview email after editing

## **System Requirements**

Your store should be running on Magento Community Edition version 2.1.x, 2.2.x, 2.3.x

# Configuration

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	GENERAL	~	General			$\odot$				
	CATALOG	~	Enable Module	Yes 🔹						
	SECURITY	~	Email Sender	General Contart 🔹						
CONTENT	MAGENEST	^	[global] BCC name	Harshbardhan Guota						
REPORTS	Abandoned Cart		[giobal] BCC email [giobal]	khanhpd@magenest.com						
STORES	CUSTOMERS	~	Email test [giobal]	khanhpd@magenest.com						
SYSTEM	SALES	~	Setting							
FIND PARTNERS & EXTENSIONS	DOTMAILER	~				0				
	SERVICES	~	Time for carts to be considered abandoned for Members [global]	0 Default is 60 minutes						
	ADVANCED	~	Coupons are only available to particular customers [global]	Yes 🔹						

• On the Admin sidebar, go to Stores > Configuration > Magenest > Abandoned Cart.

#### General settings:

- Enable Module: Choose Yes to enable the Abandoned Cart Email module
- Email Sender: Select the email address to send the abandoned cart email from. You can configure these email addresses in Stores > Configuration > General > Store Email Addresses.
- BBC Name: Enter the name of the blind carbon copied receiver.
- BBC Email: Enter the email address of the blind carbon copied receiver.
- Email Test: Enter your email address to receive test emails about abandoned products.

#### Settings:

- Time for carts to be considered abandoned for Members: 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.
- Coupons are only available to particular customers:
  - If Yes, the attached coupon is available only when receivers have an account on the store already or register for a new one on the link attached in the mail.
  - If No, the coupon will be applied for all abandoned cart email receivers, including both registered customers and non-registered customers.

#### Mandrill Integration:

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- Enable Mandrill: Choose Yes to enable the Mandrill Integration
- API Key: Enter Mandrill API Key

Note: Get the API Key from your MailChimp account. If you haven't got one, please go to http://mailchimp.com/ and register for an account.

#### NexMo Integration (SMS)

NexMo allows you to remind your customers about their abandoned cart by sending SMS messages to their phone number

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- Enable: Choose Yes to enable the NexMo Integration
- API key: enter Nexmo API Key.
- API secret: enter the Nexmo API Secret key.
- From: Enter the mobile number which is used to send follow up messages to customers.
- Allow mobile field input in customer register form: If you enable this, the mobile number input field will be added in the customer's registration form.
- Make mobile number a required field: Set the mobile number field as required, customers must fill in this field before submitting the form.

Personal Information						
First Name •	]					
Last Name *						
Email *						
Sign Up for Newsletter						
Sign-in Information						
Password *						
Confirm Password *	M	lake mobile is required field	Ye If yo	es ou choose yes the mobile input is required field	•	
Additional Information	_					
Mobile •	]					
	Allow	mobile field input in custome	er	Yes		•
Create an Account		register for	m	If you choose yes, there is a mobile input field in customer's registration form		

### Manage follow up rules

Go to Marketing > Magenest Abandoned Cart > Manage Rules

the grid table, you can view all the available follow up rules with brief information

DASHBOARD	Manage Rul	le								Q 📣 🛔	ce230sample 🔻
\$ SALES										Ad	ld New Rule
CATALOG									<b>T</b> Filters	Default View •	🏠 Columns 🗸
	Actions	1 records fou	nd					20	👻 per pag	je <	1 of 1 >
MARKETING	ID Nam	ne	Status	Message Generated	Successfully Sent	Opens	Clicks	Carts Restored	From Date	To Date	↓ Action
CONTENT	🗌 1 Abar	ndoned Cart Rule 1	Active	19	5	5	11	1	2019-04-01	2019-04-30	Select 💌
STORES	ሰ Copyright © 2019	Magento Commerce Inc. All rights re	served.								Magento ver. 2.3.0
SYSTEM											Report an Issue
FIND PARTNERS & EXTENSIONS											

- Message Generated: the number of messages generated for abandoned carts.
- Successfully Sent: the number of messages delivered to customers.
- Opens: the number of messages has been seen by receivers.
- Clicks: the number of clicks on attached links or buttons.
- Carts Restored: the number of carts that customers go back for.
- From Date: time that rules are active.
- To Date: time that rules are finished.
- Action: choose the action to delete or edit the rule.

## Create an abandoned cart rule

In order to create a new rule, click on the Add New Rule buttonblocked URL

#### General Setting:

- Rule name: This name will be used in Magento 2 back end for management
- Description: Short description of the rule
- Status: Activate/ Deactivate the rule
- From: Set the start date for the rule
- To: Set the end date for the rule
- Store View(s): Choose the store view(s) you want to apply the rule
- Customer Groups: Choose customer group to apply the follow-up rule
- Discard Subsequent Rule: To stop processing other rules after this rule is applied, set Discard Subsequent Rules () to "Yes." This safeguard prevents customers from receiving multiple discounts for the same cart.
- Priority: Enter the ordinal number to prioritize the rule. (0 is the highest priority)
- Cancel Condition When: There are 3 situations to cancel the rule automatically Link from Email Clicked, Any product went out of stock, and All products went out of stock. You can select one or more situations for the rule.

**Condition:** Select the conditions for the rule

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Email Chain:

			← Back Delete Reset Save and Continu	e Edit S
RULE	Files extension allowed: jpg, jpeg, gif, png, p	df, doc, docx, txt		
General Setting 📝				
Conditions	Browse to	find or		
Email Chain	drag files	here		
CMC	new-logo.png 449x82 px, NaN undefined			
UNIC	Email Template (Email Sent After)	Delivery Time	Coupon	
Google Analytics	Abandoned Cart Template 1 💌	Days	Enable coupon Yes	Delete
Test Campaign		Hours	Type Eivad amount discount	
		Mins	Discount Amount	
		2	Expired in (days)	
			10 III	
			2	
			Use snopping Cart Kule	
	Abandoned Cart Template 2 💌	Days	Enable coupon Yes 💌	Delete
		Hours	Type Percent of product price discount	
		Mins 5	Discount Amount 25	
			Expired in (days) 90	
			Max Qty discount	
			Discount Qty Step (By X)	
			Use Shopping Cart Rule	
			The Promotion Rule must meet the requirements (If you can't see your promotion rule, please re-configure the promotion rule as below):	
			Is Active     Coupon: Specific Coupon     Coupon: Use Auto Generation	
	Abandoned Cart Template 3	Days 1	Enable coupon Yes V	Delete
		Hours	Type Fixed amount discount	
		Mins 0	Discount Amount 25	
			Expired in (days) 30	
			Max Qty discount 10	
			Discount Qty Step (By X)	
			Use Shopping Cart Rule	
	Add email in chain			

- Upload the attachments of the follow-up email. You can upload both images and documents. The format supported are jpg, jpeg, gif, png, pdf, doc, docx, tx.
- Click on the "Add email in chain" button to create a new email chain.
- Select the email template for the email chain. You can create a new email template(s) in Marketing > Email Templates.

Coupon settings:

- Enable Coupon: To add a coupon code to this follow-up email
- **Type:** There are 3 options for the coupon: Percent of product price discount Fixed amount discount Fixed amount discount for the whole cart
- Discount Amount: Enter the coupon code value. The unit of the discount amount depends on the type of coupon
- Expired in (days): the expiry time of the coupon in day(s)
- Max Qty Discount: Set the maximum quantity of products in a cart that the discount code is applied. For example, if the maximum quantity is 5 items, then the customer cannot apply the coupon code for a cart with 6 items.

- Discount Qty Step (by X): Sets the number of products represented by "X" in a "Buy X Get Y Free" promotion
- Use Shopping Cart rule: Tick in the checkbox and select a cart price rule from the drop-down list

#### SMS tab:

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- Click on the "Add SMS in chain" button to create a new SMS chain. You can add unlimited SMS chains to one rule.
- Fill in the SMS template to send to customers.
- · Set the Delivery Time (by days, hours, and minutes) and add a coupon to encourage your customers to purchase products with discounts.

#### Coupon settings:

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- Enable Coupon: To add a coupon code to this follow-up email
  - **Type:** There are 3 options for the coupon:
    - Percent of product price discount
    - Fixed amount discount
    - Fixed amount discount for the whole cart
- Discount Amount: Enter the coupon code value. The unit of the discount amount depends on the type of coupon
- Expired in (days): the expiry time of the coupon in day(s)
- Max Qty Discount: Set the maximum quantity of products in a cart that the discount code is applied. For example, if the maximum quantity is 5 items, then the customer cannot apply the coupon code for a cart with 6 items.
- Discount Qty Step (by X): Sets the number of products represented by "X" in a "Buy X Get Y Free" promotion
- Use Shopping Cart rule: Tick in the checkbox and select a cart price rule from the drop-down list

#### Google Analytics

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- Campaign Source: Identify a search engine, newsletter name, or other sources.(i.e. email, follow-up-email, newsletter)
- Campaign Medium: Identify a medium such as an email or cost-per-click. (i.e. cpc, banner, email).
- Campaign Name: Identify a specific product promotion or strategic campaign. (i.e product, promo code, or slogan).
- Campaign Term: Identify paid keywords.
- Campaign Content: Differentiate advertises or links that point to the same URL.

#### Test Campaign:

Û	One or more Indexers are Invalid. Make sure your Magento cron job is running.     System Me							stem Messages: 1 🔻	
DASHBOARD	test							Q	🖡 💄 khanh 🗸
\$ SALES						← Back D	elete Rese	et Save and Continue I	Edit Save
CATALOG									
CUSTOMERS	RULE	Collect Abandoned	Cart From Quote 1 records found	d					
MARKETING	General Setting	ID Quote Id	Email	Action	Created At	Updated At	Is Send Er	mail for Test Template	Test Email
	Conditions	2 4	khanhdcd12c1@gmail.com	Send Mail	Jul 15, 2020	Jul 15, 2020	SENT kh	nanhpd@magenest.com	Test Mail
	Email Chain								
	SMS								
\$	Google Analytics								
SYSTEM	Test Campaign								
FIND PARTNERS & EXTENSIONS									

- You can send follow up emails manually to specific email addresses for testing purposes.
- Get the abandoned cart email list by clicking on Collect Abandoned Cart From Quote.
- Click on "Send email" in each row to send a follow-up email to that email address.
- Click "Test email" in each row to send a test email to the email address you entered in config (the content of the email test is the same as the email message sent to the customer)

### A/B Test Campaigns

• On the Admin sidebar, go to Marketing > Magenest Abandoned Cart > A/B Test Campaigns.

Ŵ	A One or more Indexers are	e Invalid. Make sure your Magento cron Job	is running.		System	n Messages: 1 🔻			
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\$ SALES					Add New	/ Campaign			
CATALOG									
CUSTOMERS	Actions • 1 records found 20 • per page < 1 of 1 >								
MARKETING	D ID	Status	Name	From Date	To Date	Action			
	1	Active	test	2020-07-17	2020-07-30	Select 🔻			
	Times in Copyright © 2020 Magento Commerce Inc. All rights reserved.								
SYSTEM						Report arrissue			
FIND PARTNERS & EXTENSIONS									

- In the grid table, you can view all the available follow up A/B Test Campaigns with brief information (Status, From-To Date, Action) • To create a new campaign, click on "Add New Campaign"

#### • On the New A/B Test Campaign page

Û	One or more indexers are invalid. Make sure your Magento of	▲ One or more indexers are invalid. Make sure your Magento cron job is running.						
DASHBOARD	New A/B Test Campaign		Q 🏚 💄 khanh 🗸					
\$ SALES		← Back	Reset Save and Continue Edit Save					
CATALOG								
CUSTOMERS	Campaign Details			_				
	Status	Active •						
	Campaign Name \star	test						
REPORTS	Description	test campaign						
STORES	From *	07/17/2020		ļ				
SYSTEM	To *	07/30/2020		ļ				
FIND PARTNERS & EXTENSIONS								

- Status: Activate/ Deactivate the campaign
- Campaign Name: This name will be displayed on the back end for management purposes
  Description: Enter a short description of the campaign.
  From: Set the start date of the campaign.

- To: Set the end date of the campaign.

• After saving you click on Edit to collect the rules and compare the email progress of the rules

Ŵ	A One or more indexers are	e invalid. Make sure your Magento cron job	) is running.			System Messages: 1 🔻		
DASHBOARD	A/B Test Campa	igns				Q 🏚 💄 khanh 🗸		
\$ SALES	Add New Campaign							
CATALOG								
CUSTOMERS	Actions	<ul> <li>1 records found</li> </ul>				Filters     Operault View     Columns		
	Actions	Intecords round				20 • per page		
MARKETING	ID ID	Status	Name	From Date	To Date	1 Action		
CONTENT	1	Active	test	2020-07-17	2020-07-30	Select 🔺		
						Edit		
STORES	Opyright © 2020 Magento	Commerce Inc. All rights reserved.				Magento ver. 2.2.11		
SYSTEM						Report an Issue		
FIND PARTNERS & EXTENSIONS								

• Abandoned test campaigns create campaigns that collect rules to run from the start to the end date set in the campaign.

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dasheoard							← Back Delete	Reset Save and Co	ontinue Edit	Save
SALES	Campaign Detail	ls								
CUSTOMERS		Status	Active •							
		Campaign Name 🔺	test							
CONTENT		Description								
	From * 07/17/2020									
<b>\$</b> System		To *	07/30/2020							
FIND PARTNERS & EXTENSIONS	Rule List Search Reset Fil	ter 2 records found						50 v per page	< 1 0	of 1 >
	D ID	<sup>1</sup> Name	Message Generated	Successfully Sent	Opens	Clicks	Carts Restored	From Date	To Date	
	Any 💌		From To	From To	From To	From To	From To	From IIII	From To	
	1	rule 1	1	1	1	1	1	Jul 17, 2020	Jul 30, 2020	
	□ <sup>2</sup>	rule 2	2	2	2	2	2	Jul 17, 2020	Jul 30, 2020	

Here you can easily view the rules collected
In this grid, there are multiple rule parameters such as Message Generated, Successfully Sent, Carts Restored ...

### **Compare the Sent Mail number**

C Magenest Abandoned Cart extension allows merchants to have a chart-form report on the rules' performance.



## Manage Abandoned Cart List

• On the Admin sidebar, go to Marketing > Magenest Abandoned Cart > Abandoned Carts.

• You can manage abandoned carts in the grid table with detailed information.

- Click on the Collect Abandoned Cart button to update the list.
- You can update the status for the abandoned cart(s) by selecting the item(s) then choose Actions > Set as not abandoned cart.
- <u>A Note</u>: Once you update the status to Not Abandoned, you cannot turn it back to Abandoned cart anymore.
- Customer types:
  - Guest: purchasers who do not have an account on the store.
  - Customer: registered customers

\$									
sues	Collect Abandoned Cart								
★ Filters	Oefault View 👻 🏠 Columns 👻								
Actions Actions S records found (1 selected) 20 • per pr	page < 1 of 1 >								
Set is not Ahardoned Cart									
MARCTING OF THE CONTINUE CONTI	pdated At 1								
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Image: Provide and the state of t	019-04-05 04:15:30								
REPORTS  a keysn2704@gmail.com ABANDONED guest 2019-04-03 02:03:15 201	019-04-03 02:00:41								
Image: stores         2         agg73716@cndps.com         ABANDONED         guest         2019-04-02 06:44:47         2019	019-04-02 06:43:45								
•         5         srrkanth@gmail.com         4447830768887         ABANDONED         customer         2019-04-08 09:13:50         000	000-00-00 00:00:00								

## **Notification Log**

• On the Admin sidebar, go to Marketing > Magenest Abandoned Cart > Notification Log.

• On this page, you can manage all follow-up emails and SMS that were sent to customers.

- Status:
  - ° Sent: Emails/ Messages have been sent to customers successfully.

- ° Queued: Emails/ Messages have not been sent to customers.
- Fail: the email address or phone number are invalid.
- Cancel: emails or SMSs are canceled to be sent to customers.
- Rule: the rule applied for each abandoned cart.
- Recipient Name: Name of customers receiving emails/ messages.
- Recipient Address: customers' email address or phone number.
- Type: Email/ SMS
- Coupon Code: coupons applied for each customer (if available)
- Clicked: status of sent emails or SMS
  - ° Yes: customers have clicked on attached links in the emails
  - $^\circ~$  No: customers have not clicked on attached links in the emails
- Opened:
  - Yes: receivers have seen the email or SMS.
  - No: receivers have not seen the email or SMS.
- Send Date: the time that emails or messages are delivered to the abandoned cart owner.
- Created Date: time that carts are left on store.
- · Action: Click to Send Email or Send SMS button to send/resend the emails or SMS instantly

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#### Abandoned cart dashboard

- To track the abandoned cart follow up email performance, on Admin Sidebar, go to Marketing > Magenest AbandonedCart > Abandoned Cart Dashboard.
- The extension allows merchants to track abandoned cart reports for a range of days. You can choose the start date and end date from the date picker. There are three sections on this page.
- Abandoned Cart Line Chart: the daily changes of abandoned cart numbers
- Abandoned Cart Rate: pie charts of cart abandonment rate, customer type, cart recovery rate.

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### A/B Test Campaign Dashboard

#### Go to Marketing > Magenest AbandonedCart > A/B Test Campaign Dashboard.

Abandoned Cart extension allows traders to report A/B test campaigns. You can select a start date and an end date from the date picker

- A/B Test Campaign List: Show all A/B Test Campaign List
- Show all A/B Test Campaign List:
  - Total Campaigns: Statistics of total campaigns on your site
  - · Campaigns In Progress: Total number of campaigns currently in progress
- Chart Report: When you click on "View Report" on a particular campaign the graph will be drawn and you can capture all the parameters of that campaign easily.

Ŵ	A/B Test Campa	aign Dashboai	rd				Q 🌲 💄 khanh 🗸
DASHBOARD SALES	Select a time period for your r From: 2020-07-17	To: 2020-07-30	Submit Reset				
<b>\$</b>	A/B Test Campaign Lis	st					
	Search Reset Filter	1 records found				50 💌 per page	< 1 of 1 >
,	ID	4	Status	Name	From Date	To Date	Action
MARKETING			•		From	From	
CONTENT					To	To	
	1		Active	test	Jul 17, 2020	Jul 30, 2020	View Report
STORES	A/B Test Campaign Sta	atistics					
\$	Total Campaigns	1				Click "View Report" chart to be	drawn
SYSTEM	Campaigns In Progress	1					
FIND PARTNERS & EXTENSIONS	Chart Report: test						
	Open Rate		Click Rate	Baco	Part Pate Peter Pate	coused Product Rate	
	100	0%		100%	100%	100%	

### **Email Campaign Dashboard**

• The extension allows merchants to view abandoned cart email reports on a specific period. There are two sections on this page: Emails Line Chart and Emails Opening Rate & Clicking Rate.

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## Update

- When a new update is available, we will provide you with a new package containing our updated extension.
- You will have to delete the module directory and repeat the installation steps above.
- 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 six-month 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 services 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.