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

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 thank 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

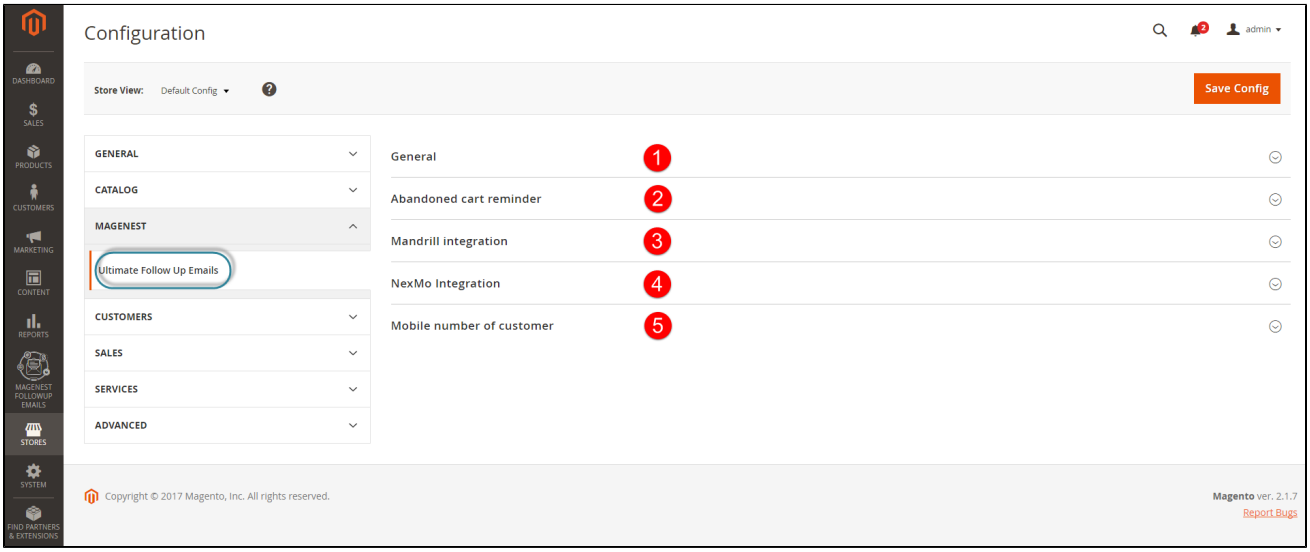
Your store should be running on Magento Edition version **2.x.x.**

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.

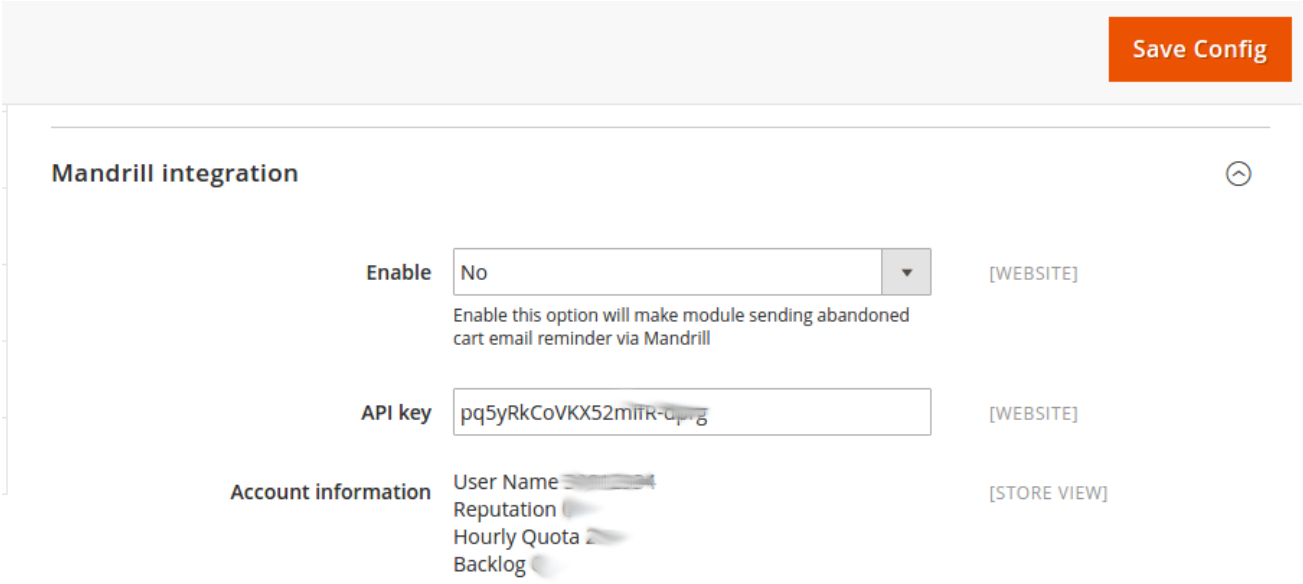
Customer No Activities Reminder

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.



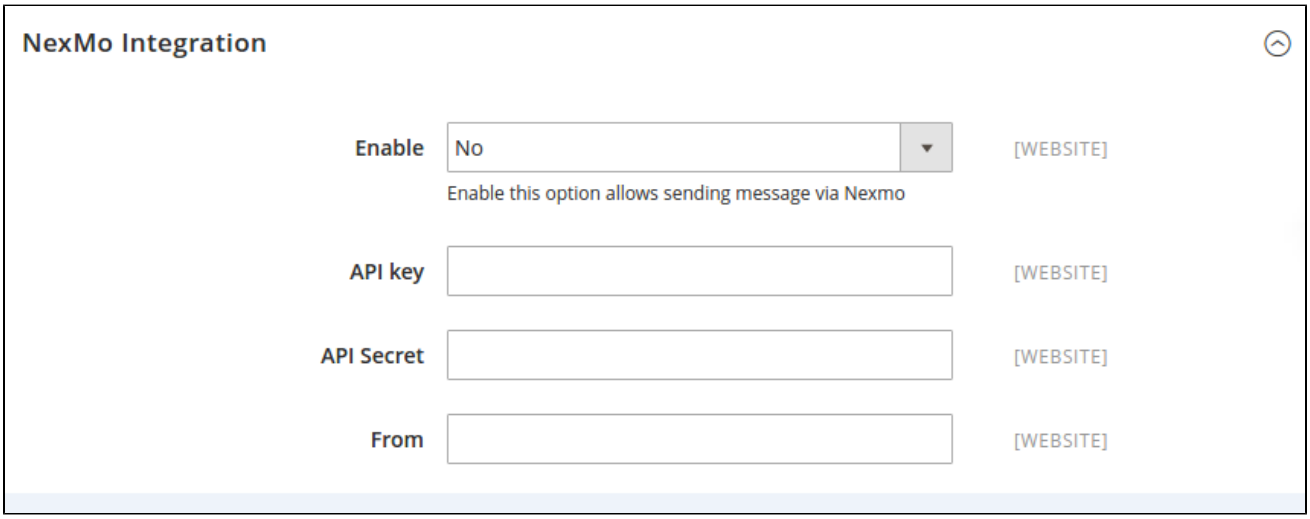
NexMo Integration

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.



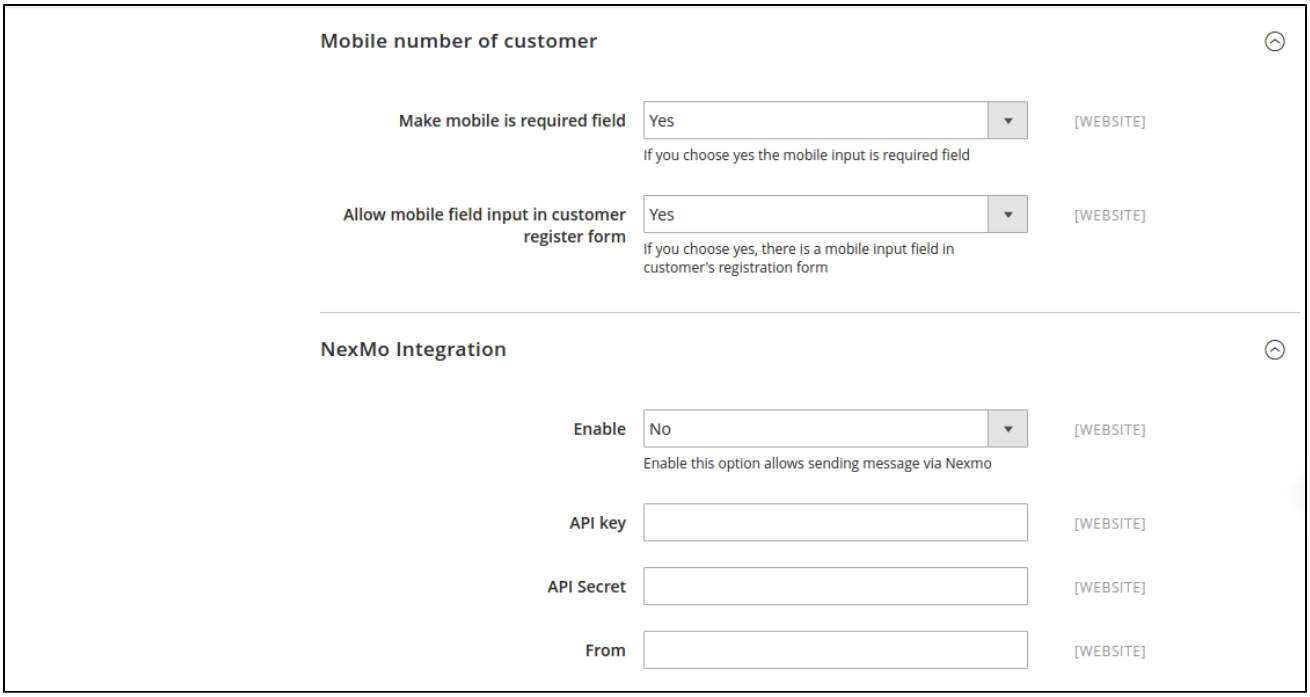
Mobile number of customer

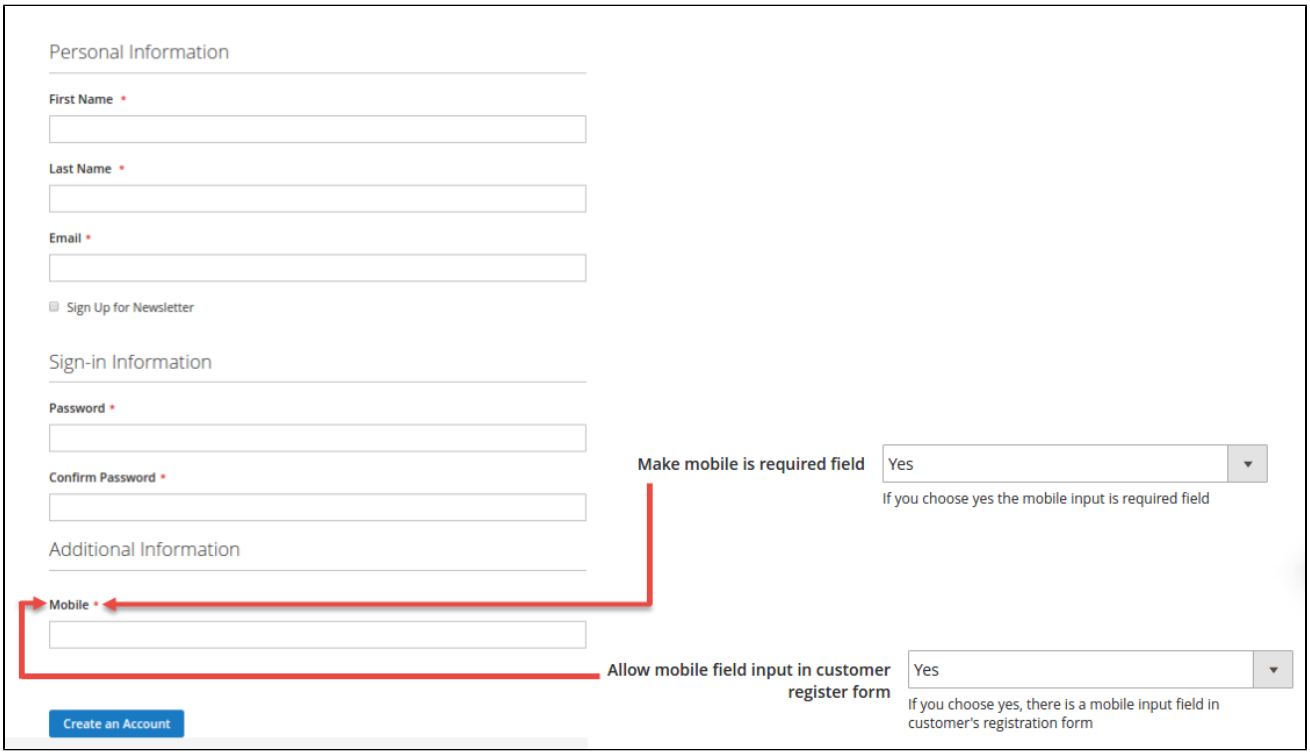
Allow mobile field input in customer register form:

- **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.

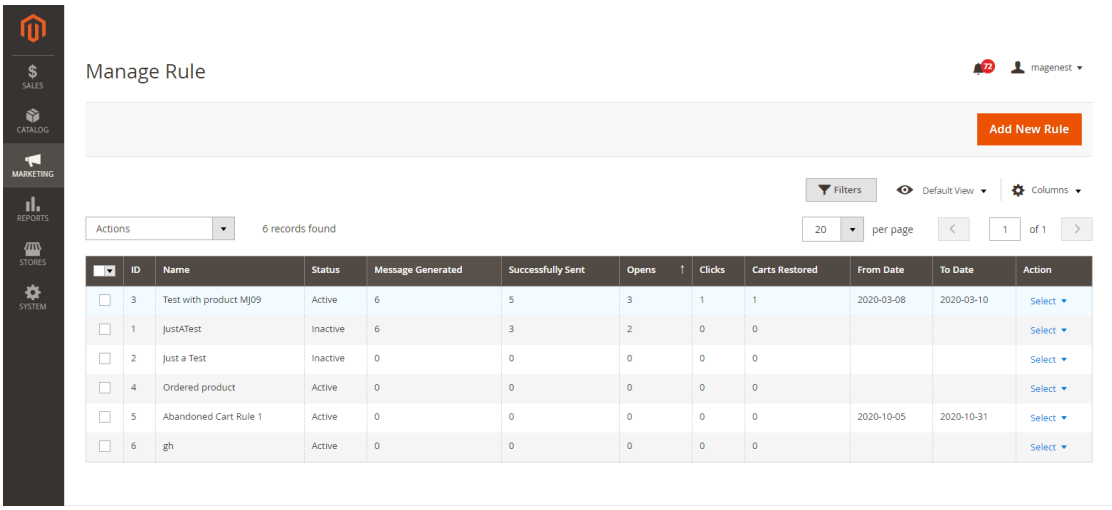




Setting Up Rules

We created an **Ultimate Follow Up Emails** menu which allows you to set and manage email and sms.

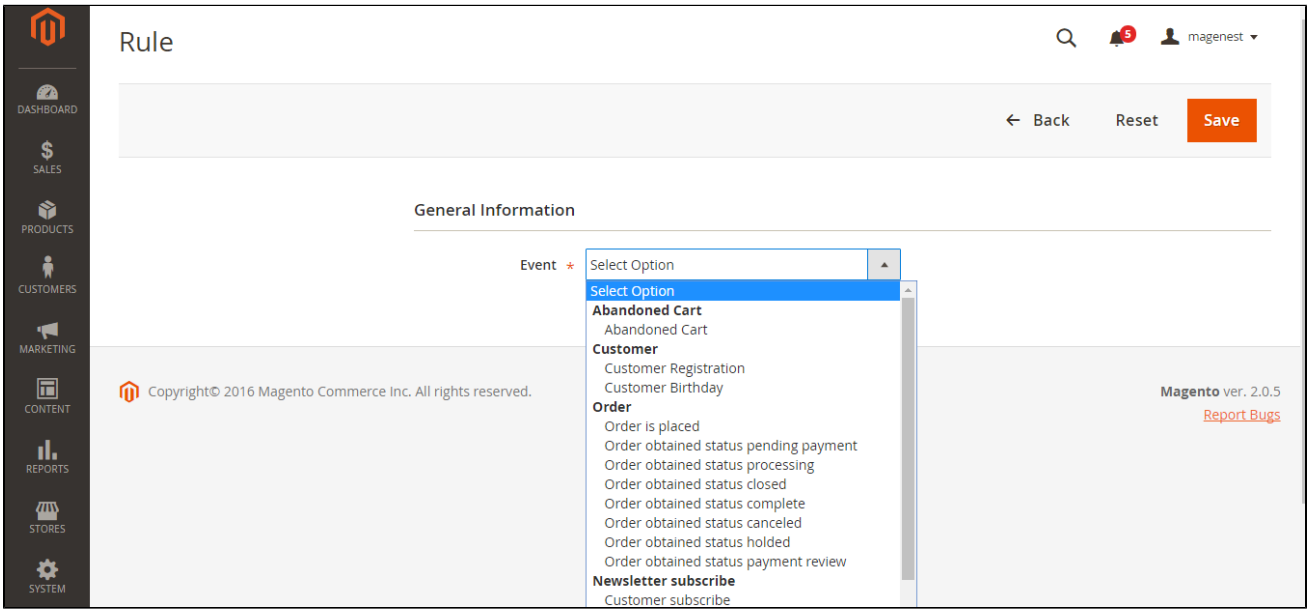
Firstly, set rules related to the email type which suits their business strategy such as abandoned cart, customer birthday and so on, by clicking on **Follo w Up Emails And SMS > Trigger Rules.**



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.

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



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

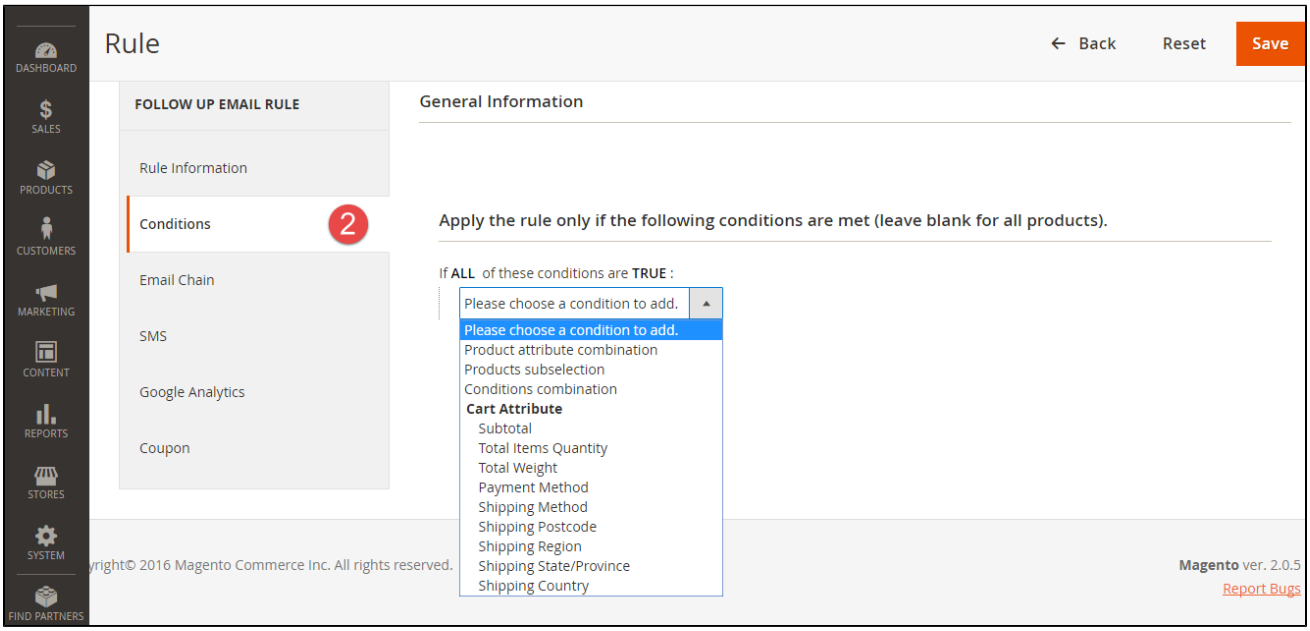
Click on **Next** button to go to the setting section for the new rule.

Rule Information

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

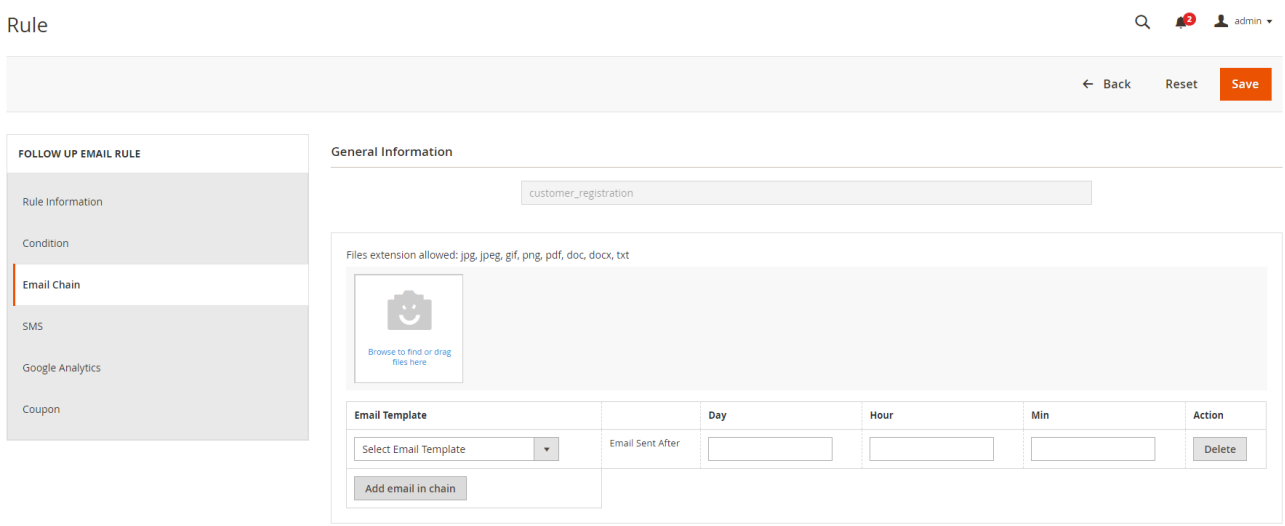
Condition

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.

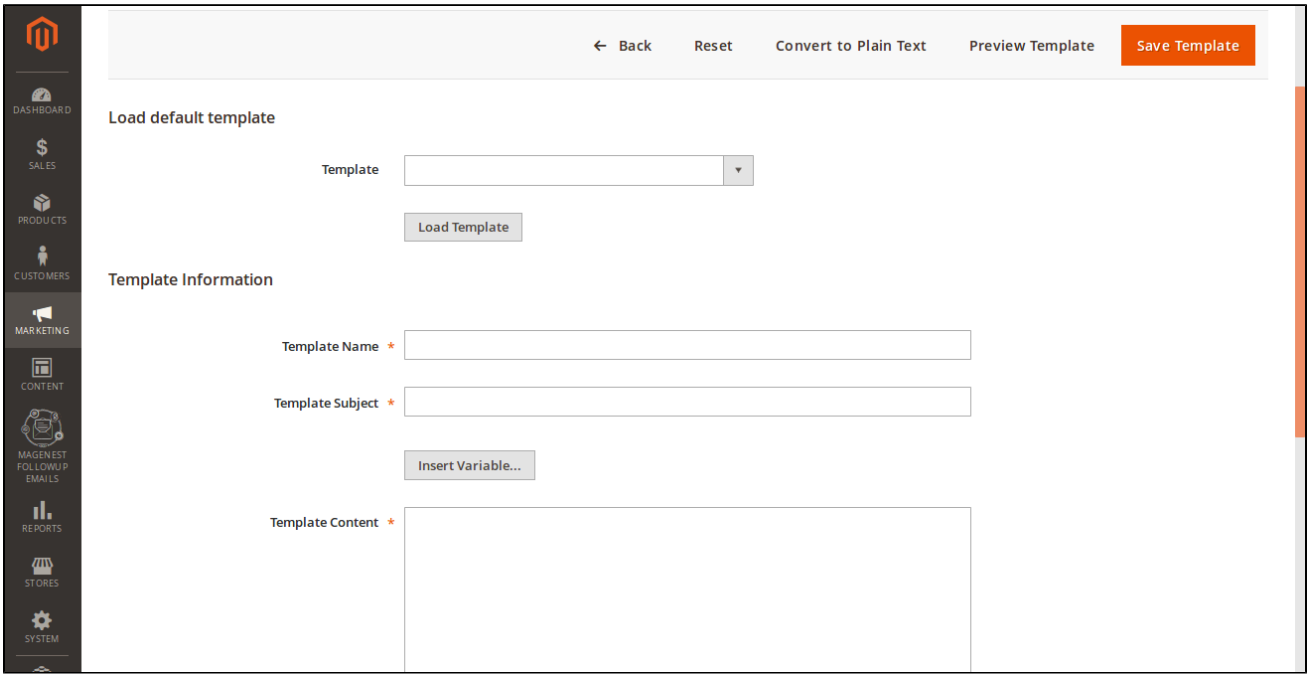


Add the attached files in email.

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 **Configurati on** *(Gmail Account)*.
- You can insert variables in email template and preview email after editing.

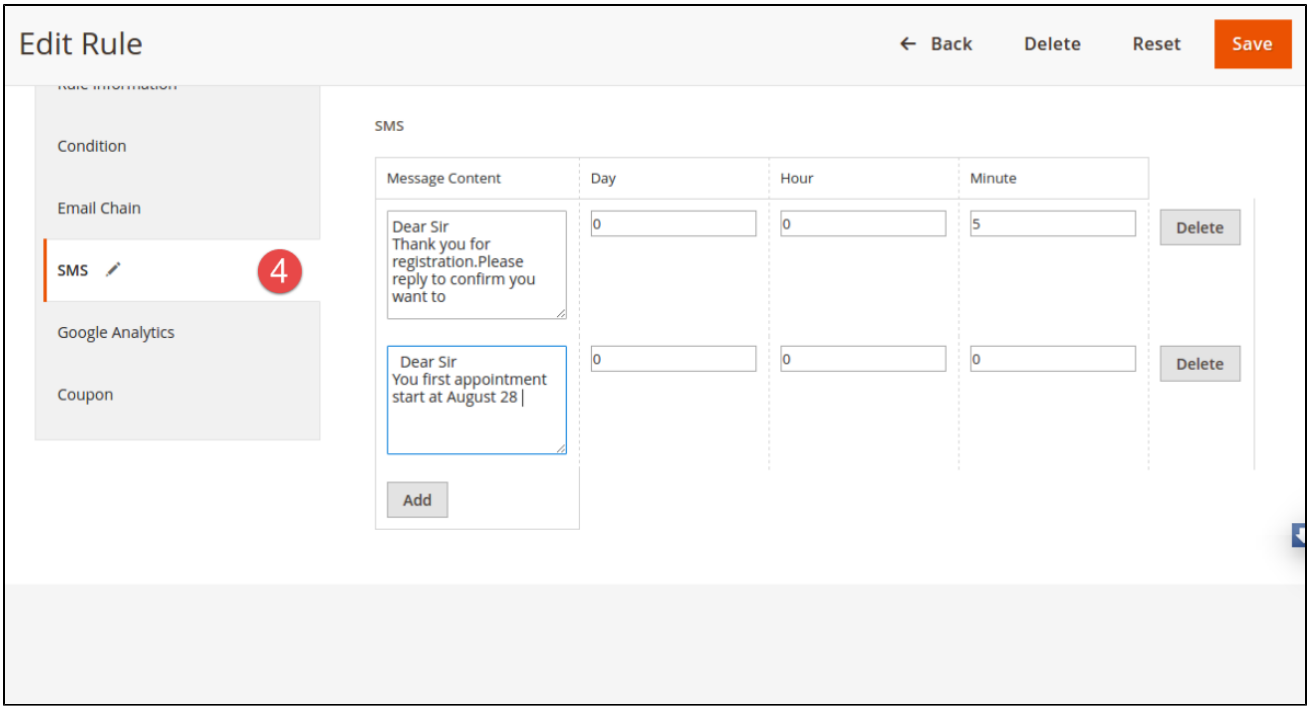


SMS

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.

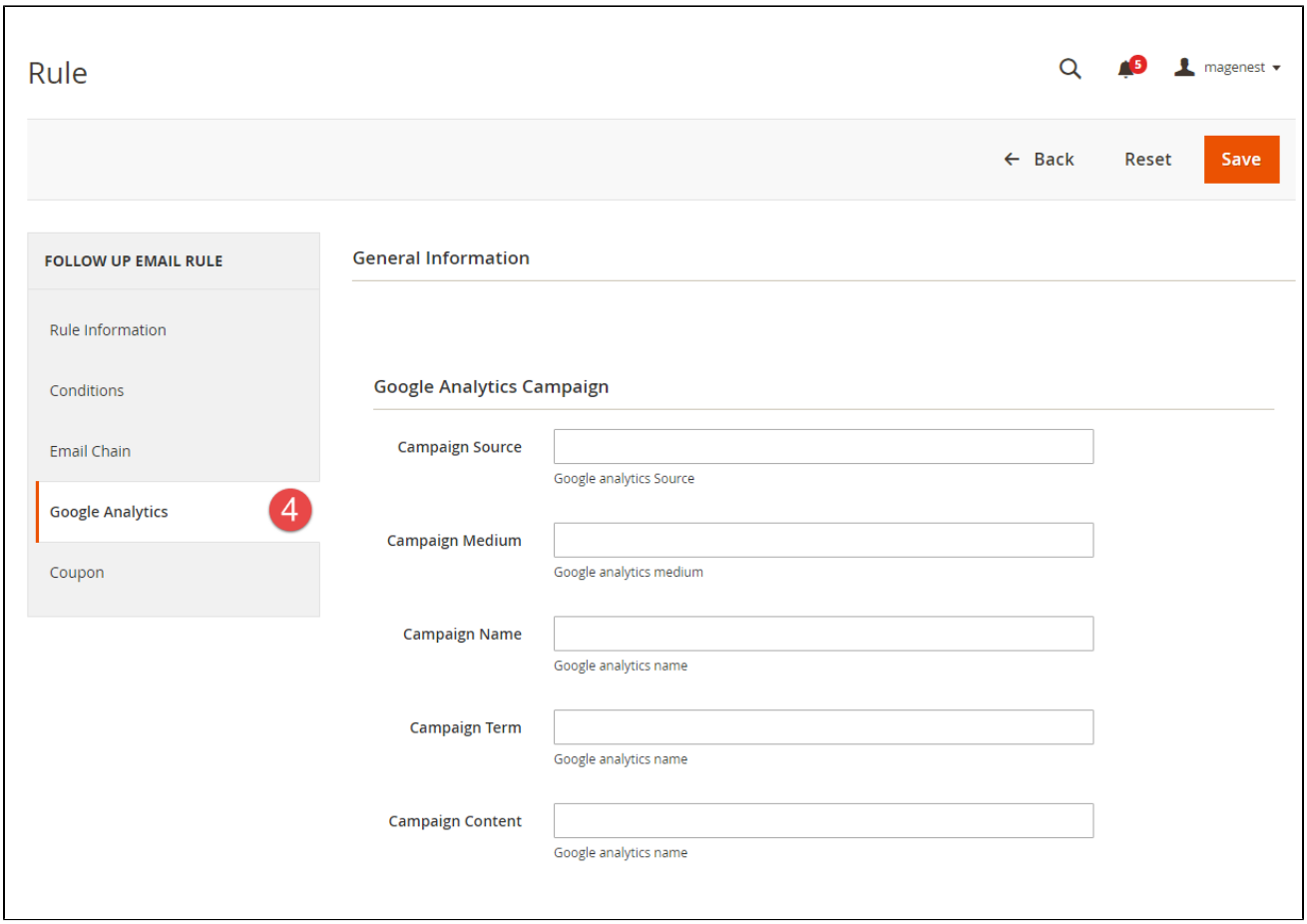


Google Analytics

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.



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).

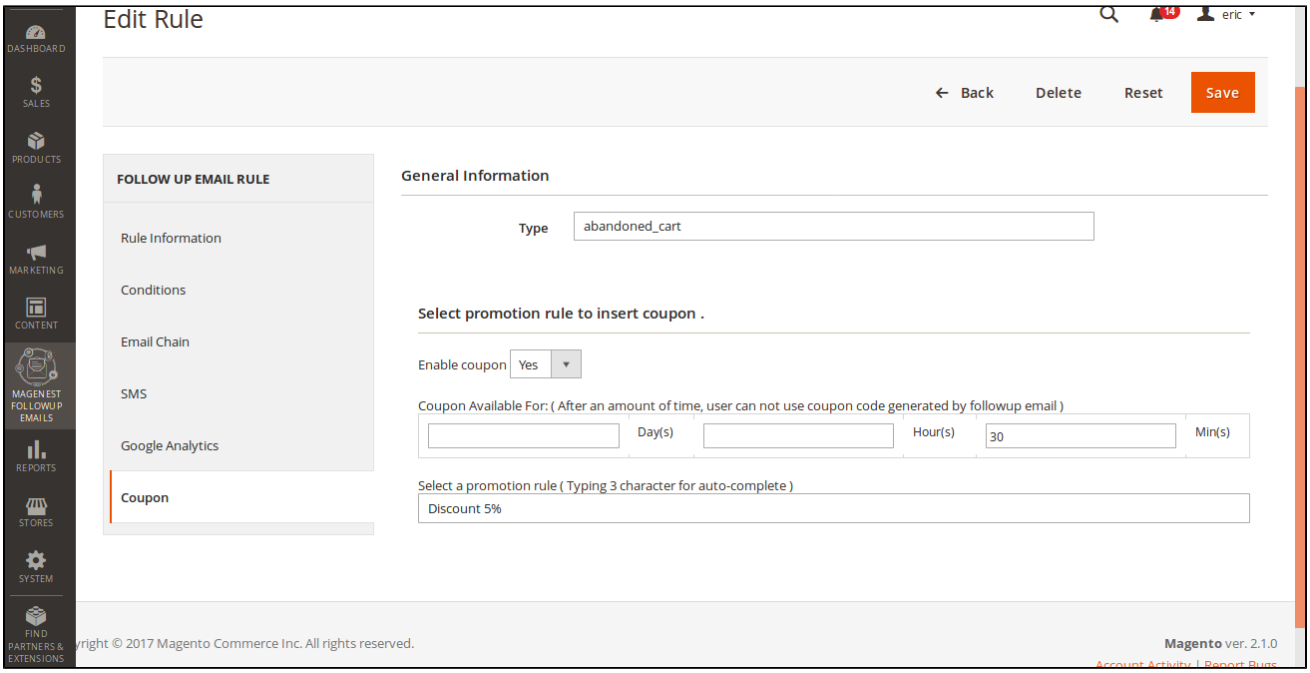
To track Google Analytics Campaign log in into your Google account and go to **Traffic Sources** > **Campaigns**. Select campaign source from the list.

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 actived right after follow-up email sent.

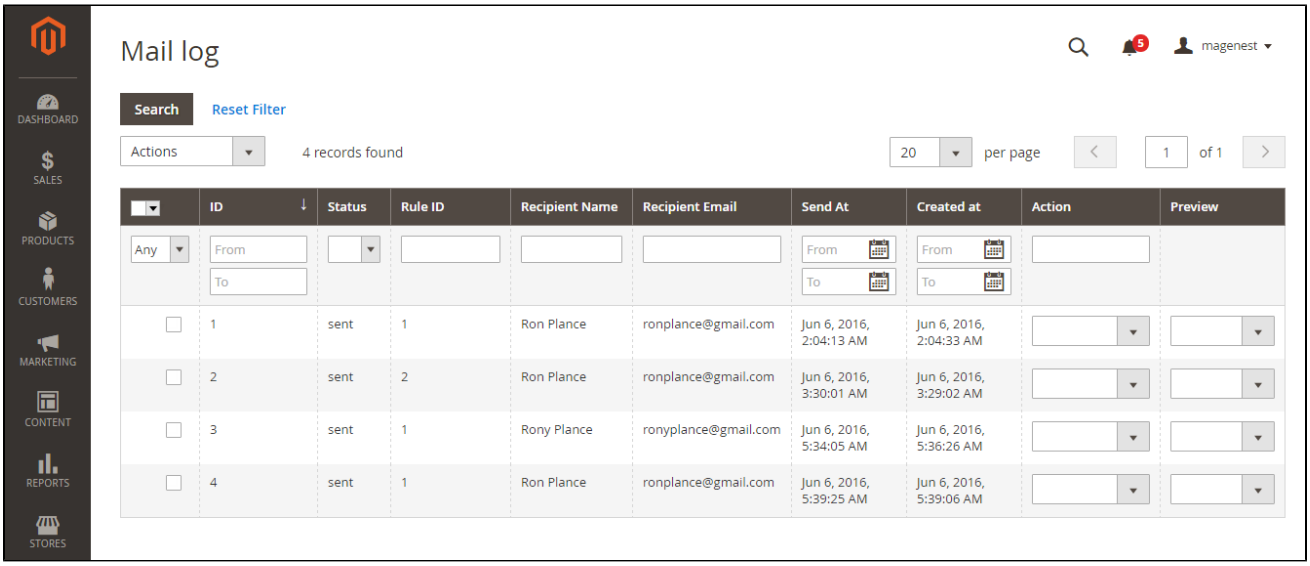


Mail Log

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.



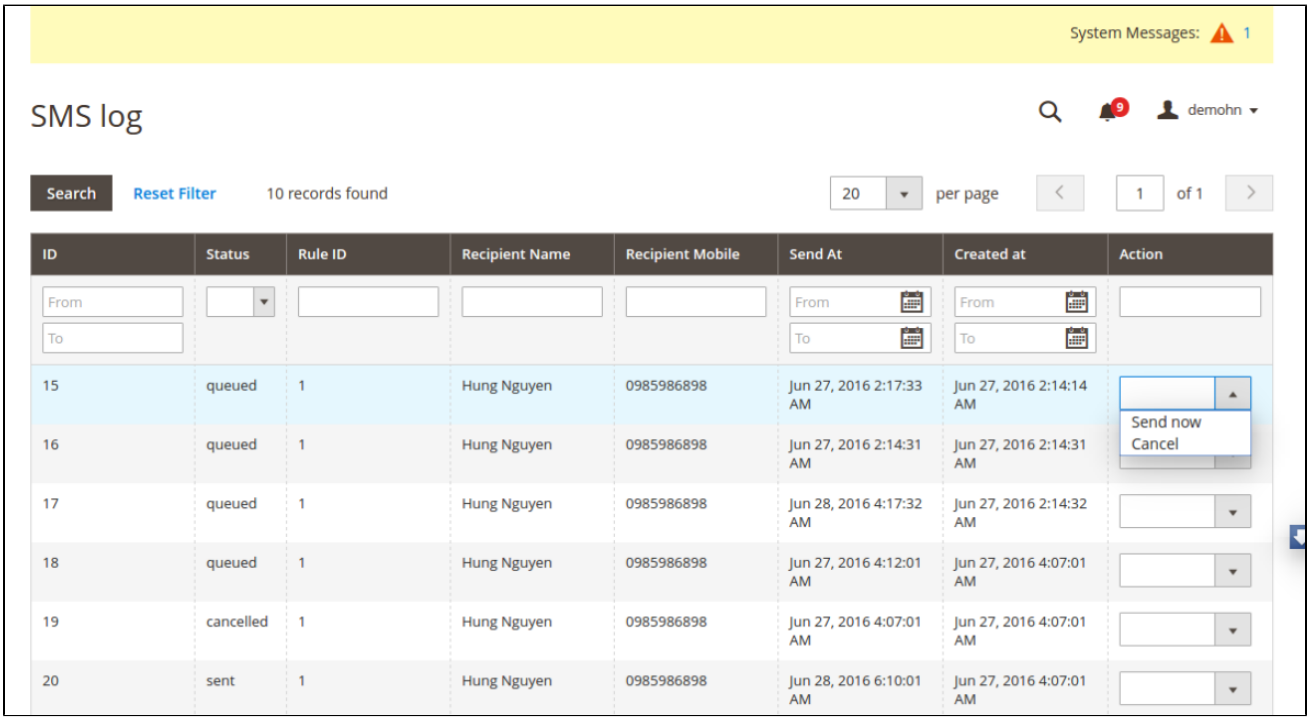
You can also apply certain actions to any of the queue items - ***Preview***, ***Cancel*** *and* ***Send Now*** *(the latter sends the selected email(s) instantly, disregarding their schedule or status)*

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.

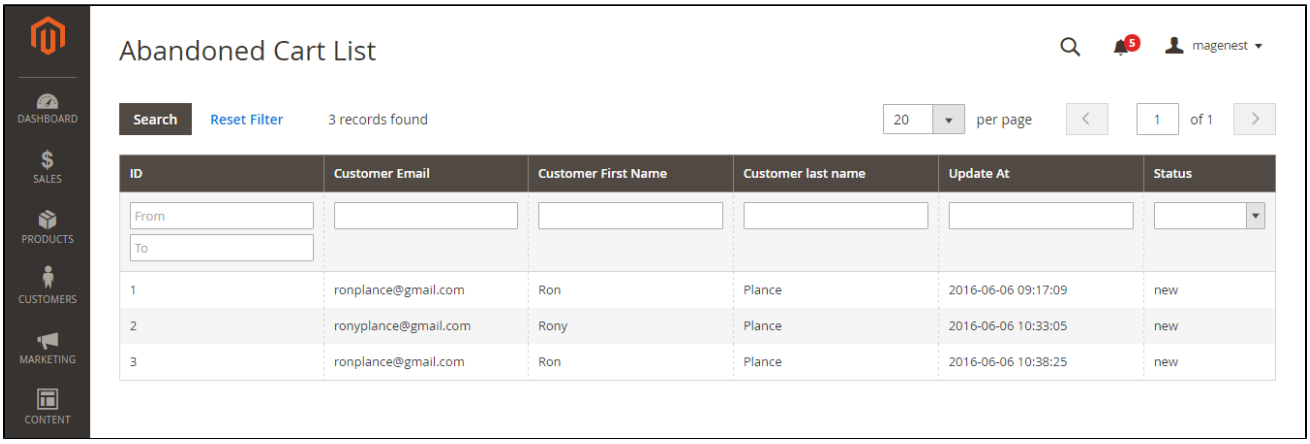


Abandoned Cart List

Go to **Follow Up Emails And SMS > Abandoned Carts.**

Manage your customers' abandoned carts in this section, including:

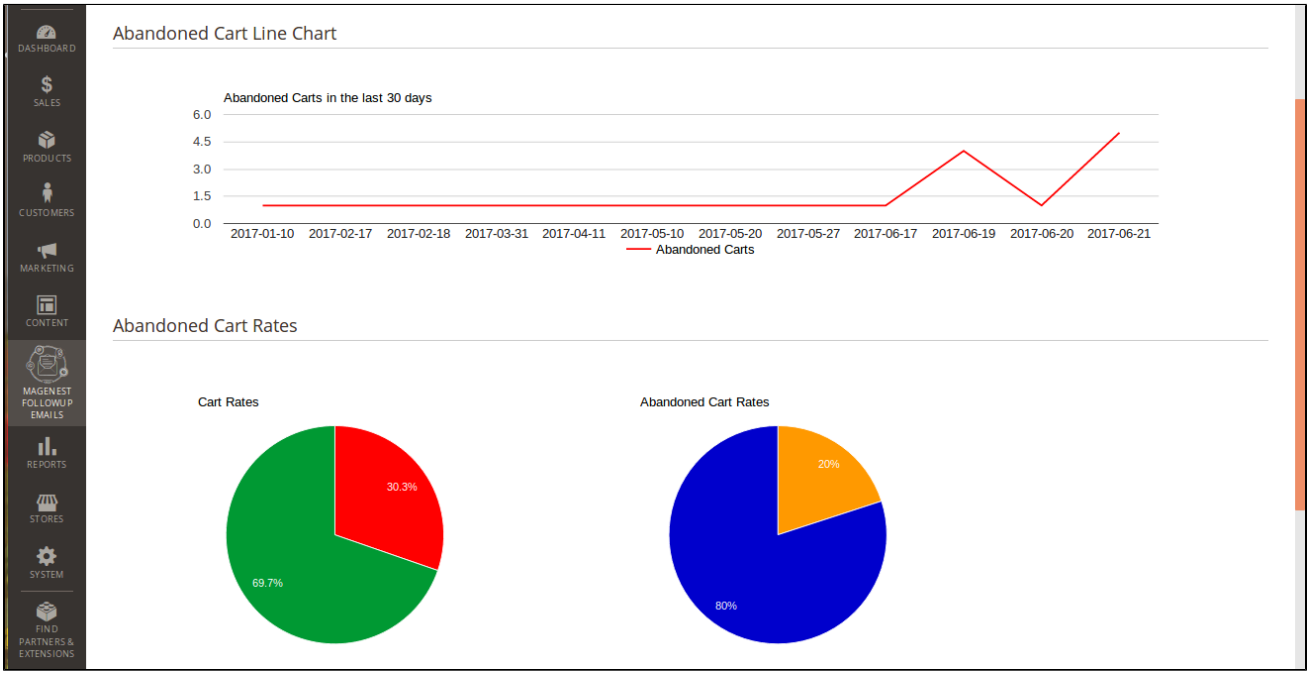
- **Customer Email.**
- **Customer First Name.**
- **Customer Last Name.**
- **Update At.**
- **Email Status.**



Abandoned Cart 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.

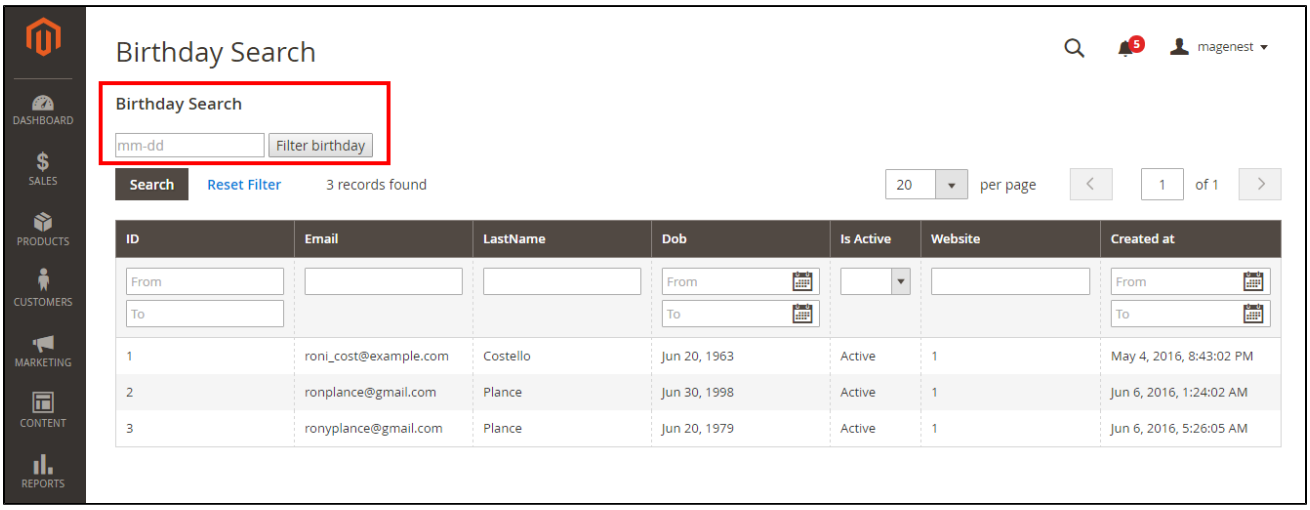


Customer Event Collect

The sample event here is birthday.

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

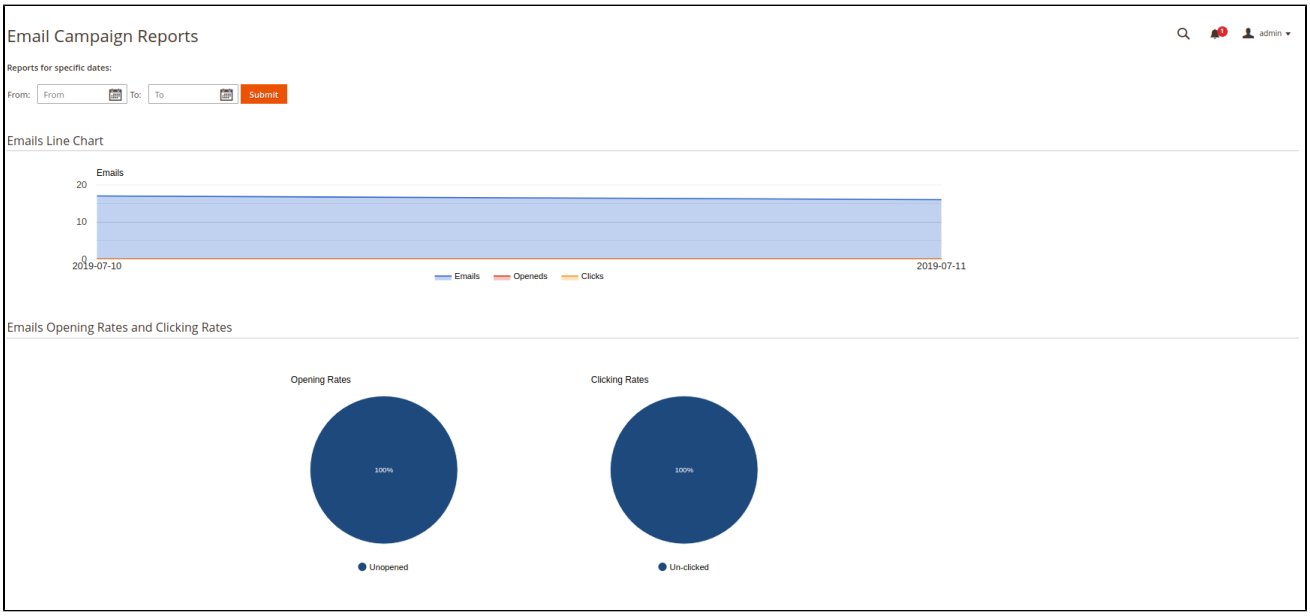
Collect your customers' date of birth in this section. Especially, our extension allows you to search by month, date. This will help the store owner search as well as manage an easy way.



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}}` ` ` `We notice you have abandoned cart` `  ` `{{var cart}}` ` ` `Please click <a href="{{var resumeLink}}" > Resume Cart </a> to complete the order.` ` ` `We gift you a coupon with code {{var coupon.code}}` ` `

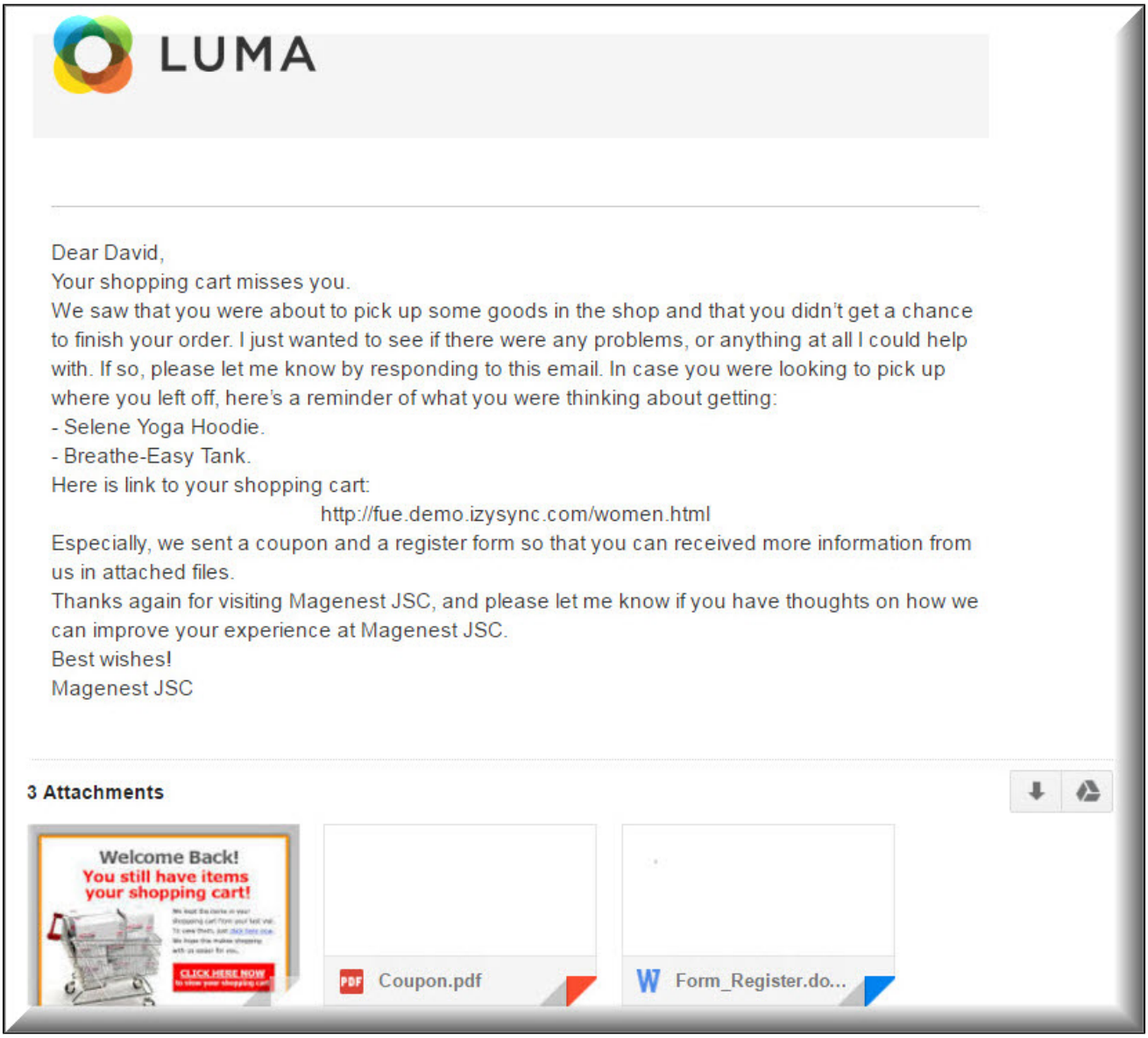
Event email template

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.

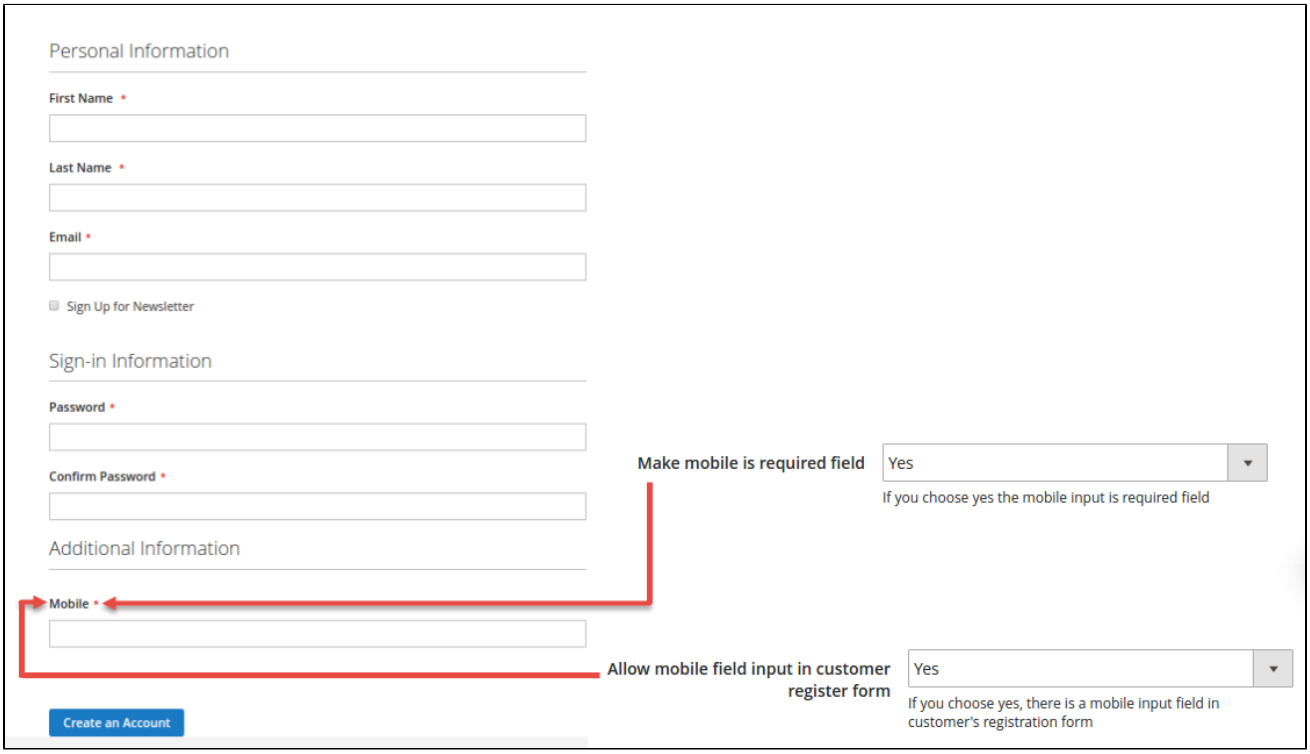


Integration with Nexmo to send SMS

➕ 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.

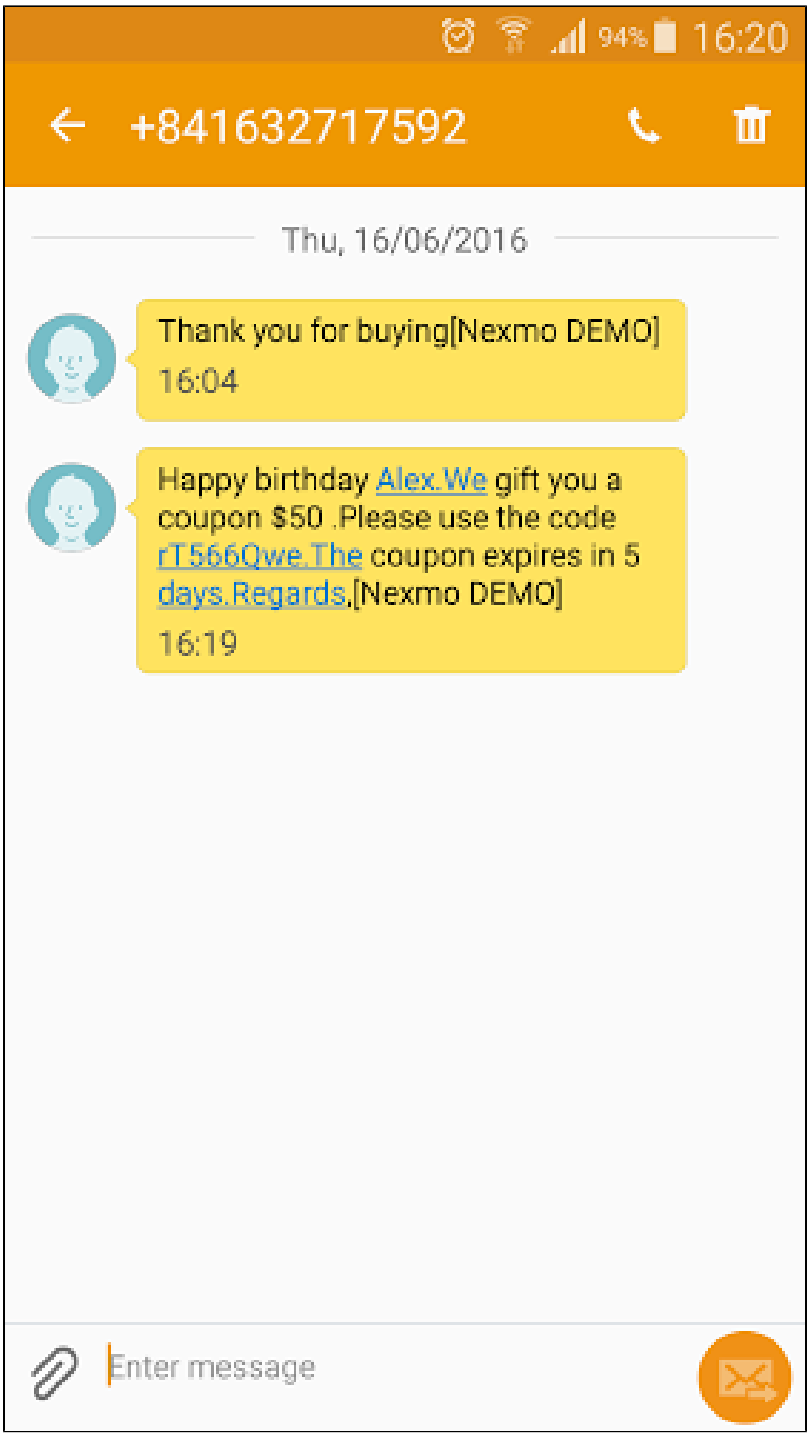


Sample SMS

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.