

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 support@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

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

The screenshot shows the Magento Admin Configuration page for the Abandoned Cart module. The left sidebar contains navigation links for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Configuration' and shows the 'Abandoned Cart' section under the 'MAGENEST' category. The 'General' tab is active, displaying settings for the module. A yellow warning banner at the top states: 'One or more indexes are invalid. Make sure your Magento cron job is running.' The 'General' section includes fields for 'Enable Module' (set to Yes), 'Email Sender' (General Contact), 'BCC name' (Harshbardhan Gupta), 'BCC email' (khanhpd@magenest.com), and 'Email test' (khanhpd@magenest.com). The 'Setting' section includes a field for 'Time for carts to be considered abandoned for Members' (set to 0) and a dropdown for 'Coupons are only available to particular customers' (set to Yes). A 'Save Config' button is located in the top right corner.

+ 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.

The screenshot shows a customer registration form with the following sections and fields:

- Personal Information**
 - First Name *
 - Last Name *
 - Email *
 - ☐ Sign Up for Newsletter
- Sign-in Information**
 - Password *
 - Confirm Password *
- Additional Information**
 - Mobile *

Annotations and settings on the right side of the form:

- Make mobile is required field:** A dropdown menu set to "Yes". Below it, text reads: "If you choose yes the mobile input is required field".
- Allow mobile field input in customer register form:** A dropdown menu set to "Yes". Below it, text reads: "If you choose yes, there is a mobile input field in customer's registration form".

Red arrows indicate the flow of logic: one arrow points from the "Make mobile is required field" dropdown to the "Mobile *" field label, and another arrow points from the "Allow mobile field input in customer register form" dropdown to the "Mobile *" field input box.

At the bottom left of the form is a blue button labeled "Create an Account".

Manage follow up rules

+ Go to **Marketing > Magenest Abandoned Cart > Manage Rules**

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

Manage Rule

Search, Notifications, User: ce230sample

[Add New Rule](#)

Filters, Default View, Columns

Actions: 1 records found, 20 per page, 1 of 1

ID	Name	Status	Message Generated	Successfully Sent	Opens	Clicks	Carts Restored	From Date	To Date	Action
1	Abandoned Cart Rule 1	Active	19	5	5	11	1	2019-04-01	2019-04-30	Select

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- **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** button [blocked 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:**

Dashboard

Sales

Catalog

Customers

Marketing

Content

Reports

Stores

System

Third-Party Integrations & Extensions

Abandoned Cart Rule 1

BackDeleteResetSave and Continue EditSave

Rule

General Setting

Conditions

Email Chain

SMS

Google Analytics

Test Campaign

Files extension allowed: jpg, jpeg, gif, png, pdf, doc, docx, txt

magenest

new-logo.png
449x82 px, NaN undefined

Browse to find or drag files here

Email Template (Email Sent After)	Delivery Time	Coupon	
Abandoned Cart Template 1	Days0 Hours Mins2	Enable couponYes TypeFixed amount discount Discount Amount10 Expired in (days)10 Max Qty discount2 Discount Qty Step (By X)2 ☐ Use Shopping Cart Rule	Delete
Abandoned Cart Template 2	Days0 Hours Mins5	Enable couponYes TypePercent of product price discount Discount Amount25 Expired in (days)90 Max Qty discount Discount Qty Step (By X) ☒ Use Shopping Cart Rule Select a promotion rule The Promotion Rule must meet the requirements (If you can't see your promotion rule, please re-configure the promotion rule as belows: - Is Active - Coupon: Specific Coupon - Coupon: Use Auto Generation	Delete
Abandoned Cart Template 3	Days1 Hours0 Mins0	Enable couponYes TypeFixed amount discount Discount Amount25 Expired in (days)30 Max Qty discount10 Discount Qty Step (By X) ☐ Use Shopping Cart Rule	Delete

Add email in chain

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Coupon settings:

- **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:

- **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:

- DASHBOARD
- SALES
- CATALOG
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES
- SYSTEM
- FIND PARTNERS & EXTENSIONS

One or more **indexers** are invalid. Make sure your **Magento cron job** is running.
 System Messages: 1

test

← Back
Delete
Reset
Save and Continue Edit
Save

RULE

General Setting

Conditions

Email Chain

SMS

Google Analytics

Test Campaign

Collect Abandoned Cart From Quote

1 records found

ID	Quote Id	Email	Action	Created At	Updated At	Is Send	Email for Test Template	Test Email
2	4	khanhdc12c1@gmail.com	Send Mail	Jul 15, 2020	Jul 15, 2020	SENT	khanhpd@magenest.com	Test Mail

- 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**.

One or more [Indexers](#) are Invalid. Make sure your [Magento cron job](#) is running. System Messages: 1

A/B Test Campaigns

[Add New Campaign](#)

Filters Default View Columns

Actions 1 records found 20 per page 1 of 1

ID	Status	Name	From Date	To Date	Action
1	Active	test	2020-07-17	2020-07-30	Select

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Magento ver. 2.2.11

- 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

One or more [Indexers](#) are Invalid. Make sure your [Magento cron job](#) is running. System Messages: 1

New A/B Test Campaign

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

Campaign Details

Status: Active

Campaign Name: test

Description: test campaign

From: 07/17/2020

To: 07/30/2020

- **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

One or more Indexers are invalid. Make sure your [Magento cron job](#) is running. System Messages: 1

A/B Test Campaigns

[Add New Campaign](#)

Filters Default View Columns

Actions 1 records found 20 per page 1 of 1

ID	Status	Name	From Date	To Date	Action
1	Active	test	2020-07-17	2020-07-30	Select Edit Delete

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

test

Back Delete Reset Save and Continue Edit Save

Campaign Details

Status: Active

Campaign Name: test

Description:

From: 07/17/2020

To: 07/30/2020

Rule List

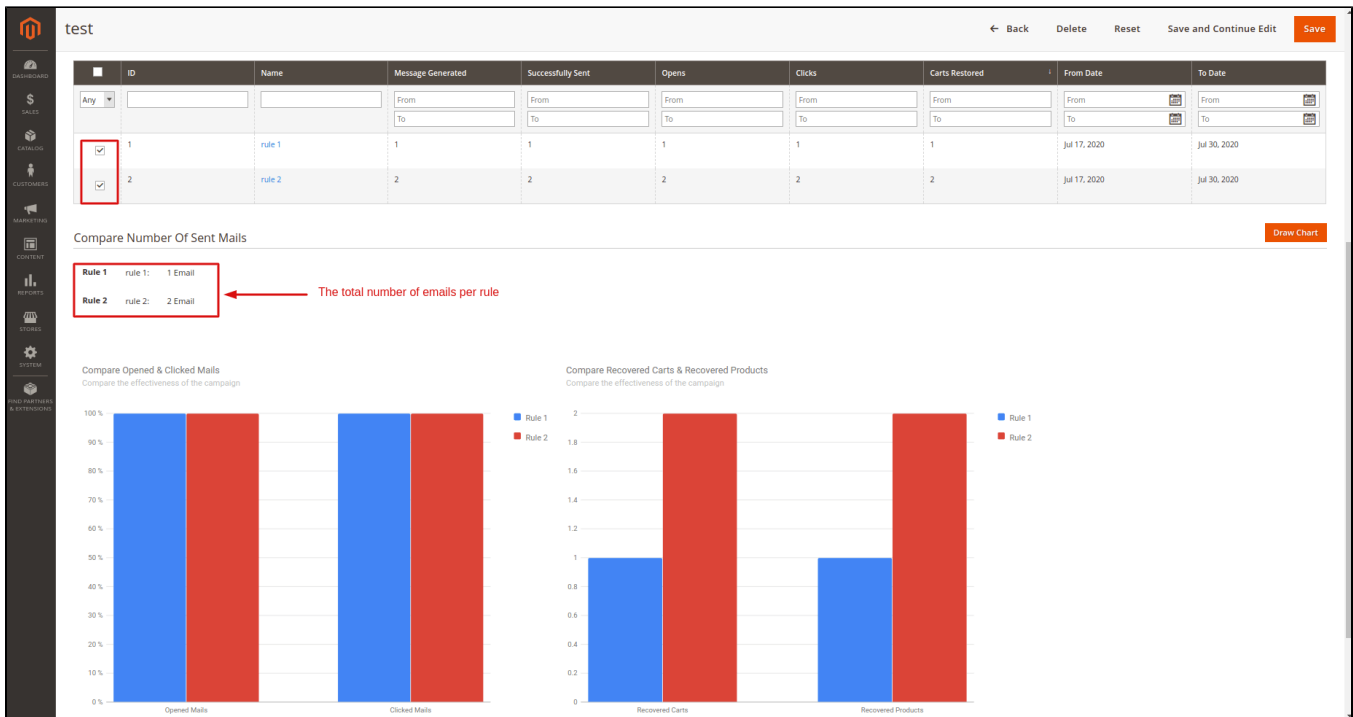
Search Reset Filter 2 records found 50 per page 1 of 1

ID	Name	Message Generated	Successfully Sent	Opens	Clicks	Carts Restored	From Date	To Date
1	rule 1	1	1	1	1	1	Jul 17, 2020	Jul 30, 2020
2	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

- 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**.
 - Note:** 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

Abandoned Carts

Collect Abandoned Cart

Filters Default View Columns

20 per page 1 of 1

5 records found (1 selected)

Set is not Abandoned Cart

ID	Customer Email	Customer Phone	Status	Type	Created At	Updated At
1	hangnt@magenest.com		NOT ABANDONED	guest	2019-04-02 06:39:38	2019-04-08 09:27:41
4	thaotx@magenest.com	+84373177609	ABANDONED	customer	2019-04-05 04:01:09	2019-04-05 04:15:30
3	keysnt2704@gmail.com		ABANDONED	guest	2019-04-03 02:03:15	2019-04-03 02:00:41
2	agg73716@cndps.com		ABANDONED	guest	2019-04-02 06:44:47	2019-04-02 06:43:45
5	srkanth@gmail.com	+447830768887	ABANDONED	customer	2019-04-08 09:13:50	0000-00-00 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
 - **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.

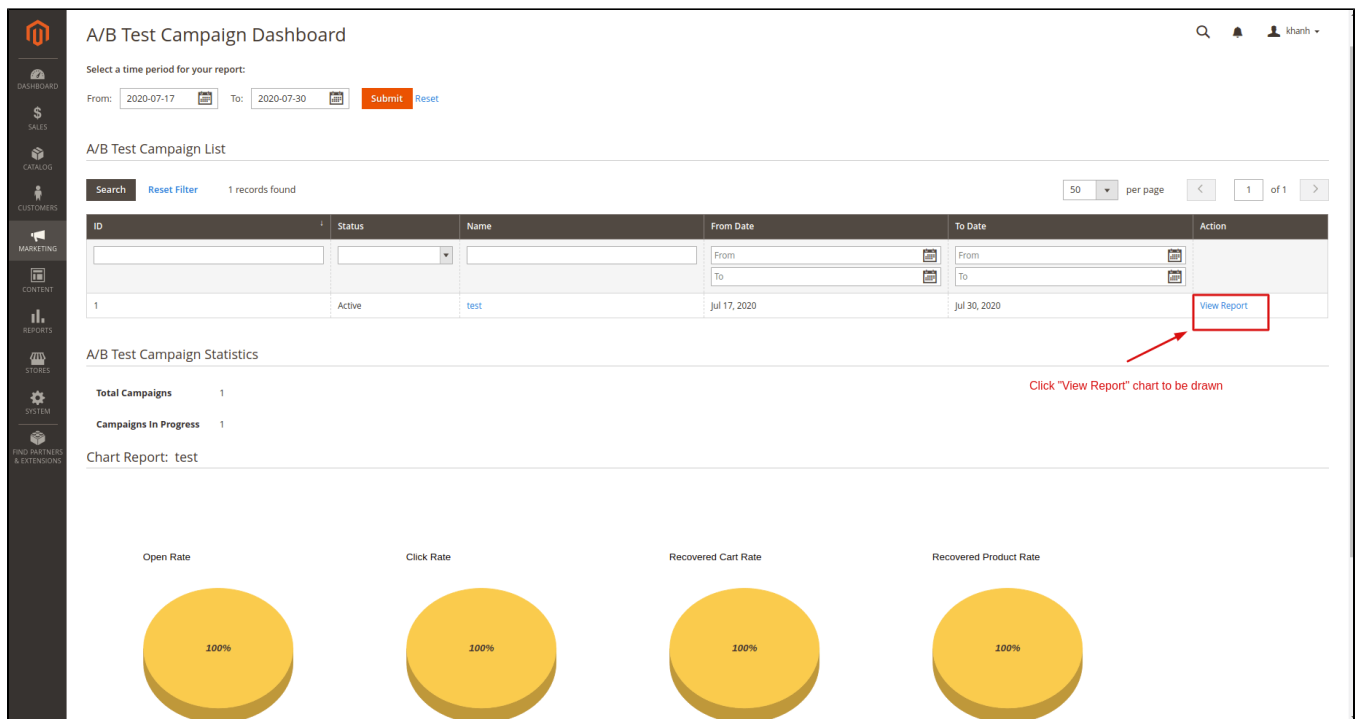
[blocked URL](#)

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.



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.