



[support@mage-addons.com](mailto:support@mage-addons.com)

[sales@mage-addons.com](mailto:sales@mage-addons.com)

Phone: 084.986.589.961

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## **Follow Up Email**

### **USER GUIDE**

***Version: 1.0***

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## **1. INTRODUCTION**

Follow Up Email is a premium extension which is developed by Padoosoft. Using this plugin you can follow-up and engage your customers based on their purchase history. It helps you to connect with your customers and increase your business sales.

## 2. CONFIGURATION

### 2.1 *General setting*

To configure the extension setting, go to **Admin panel -> Store -> Configuration -> Padoo Extension -> Follow Up Email**

**Enable** - Set Yes to enable follow up email module.

**WinBack**- period in days after which customer will be considered not active. Default is 7 days

**Automatically remove sent emails from History**- enable the option to automatically remove records from the 'history' table, which are older then the number of days specified..

**The coupon**–The option allow/un-allow automatically generate when defined rule..

**PADDO EXTENSION** ^

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**Follow Up Email**

**General**

**Enable** [store view]  ▼

**Winback Period** [store view]   
In days

**Automatically remove sent emails from History** [store view]

**Birthday Offset** [store view]   
Change this to trigger Customer Birthday Start Event before actual birthday date

**The coupon** [store view]  ▼

If the option is disabled the coupon is not automatically generation.

## 2.2 Order status setting

The section allow you mapping some order events ( create, processing, complete, cancel, closed) follow up email to order state of magento.

### Order Statuses

**Create** [store view]  ▼

**Processing** [store view]  ▼

**Complete** [store view]  ▼

**Cancel** [store view]  ▼

**Closed** [store view]  ▼

## 2.3 Sender detail setting

**Sender Name** - value provided here will be inserted in From - Name field of the follow up email.

**Sender Email** - Specify same as the setting above, but for From - Email field.

**Send copy of email to** - copy of every follow up email will be sent to address provided here

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### Sender Details

**Sender Name**   
[store view]

**The Email**   
[store view]

**Send copy of email to**   
[store view]

---

## 2.4 Testing setting

**Testing - Safe Mode**- when enabled, all emails will be sent to address provided in the setting below.

**Testing - Recipient** - email address for test emails

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### Testing

**Safe mode**   
[store view]

**Send copy of email to**   
[store view]

---

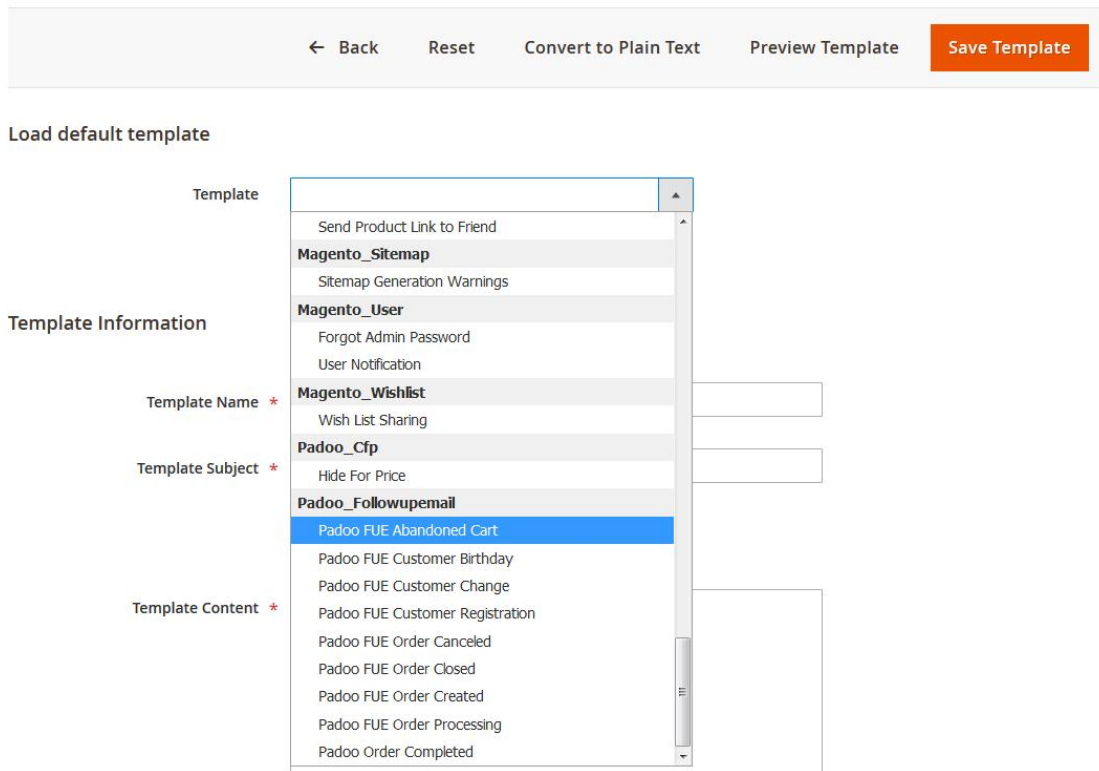
*Note : Always delete cached after apply change setting information.*

*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.*

### 3. BACKEND

#### 3.1 Setup email template

Before use Follow up email, you need setup some email template from **Email Template Management** tool of Magento. To load and edit some Email Template that available for the Follow Up Email.



#### 3.2 Setup cron tab

To auto send email and run event such as abandoned. You need setup cron job for the module by open commander on your host and run the command

```
php bin/magento cron:run --group padoo_followupemail_crontab
```

#### 3.3 Rule Management

Go to Follow Up Email => Manage Rules, click on Add new rule, you will see the Rule Information page, which includes 5 tabs: General, Email, Schedule, Conditions, and Coupons

##### 3.3.1 General

**RULES**

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General

Email

Schedule

Conditions

Coupons

### General Information

---

**Name \***

**Status**  ▼

**From Date \***

**To Date \***

**Start event**  ▼

**Cancel event**  ▼  
Only pending emails will be cancelled. Use 'ctrl' to select more than 1 event

**Stores**  ▼

**Customer Groups \***  ▼  
General  
Wholesale  
Retailer

**Name** - name of the Follow Up rule.

**Status** - enables and disables the rule.

**From Date** - The date that rule start run on site.

**End Date** - The date that rule disable run on the site.

**Start event** - event which starts email sending routine.

**Cancel event** - here you can set the event which will cancel further emails from pending email will send to customer.

**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.



### 3.3.2 Email

**Send email to customer** Yes, send to all customers  
Select 'no' if only admin to receive notification of an event

**Template \*** Padoo: Abadoned Cart

- Padoo: Abadoned Cart
- Padoo: Customer Birthday
- Padoo: Customer Change
- Padoo: Customer Registration
- Padoo: Order Canceled
- Padoo: Order Closed
- Padoo: Order Created

**Send email to customer-** when “Yes, send to all customers” the rule will work to all customer, else if choice “Yes, send only to newsletter subscribers” , Follow Up rule will work only for customers who subscribed to newsletter email.

### 3.3.3 Schedule

This is place to you setup time that the email will sent to client after event happened ( the email will send from queue).

**Send email at** 5 days 0 hours 0 minutes

### 3.3.4 Conditions

**RULES**

- General
- Email
- Schedule
- Conditions**
- Coupons

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
- Total Items Quantity**
- Total Weight
- 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.

### 3.3.5 Coupon

**RULES**

- General
- Email
- Schedule
- Conditions
- Coupons**

**Coupons**

Shopping Cart Price Rule    
Create Shopping Cart Price Rules in [here](#)

Coupon Code Prefix

Coupon expires after # (days)

**Shopping Cart Price Rule**– The cart rule that defined on Rule cart of Magento. When choice a rule then the rule will apply rule push email to queue.

**Coupon Code Prefix** – It is prefix will add when generate coupon code.

**Coupon expires after day**– It day number that the coupon code is expire ( no effect to cart rule).

### 3.4 Manage Email queue

This show list emails that generate by event that **Follow Up Email** module and never send to customers.

Emailqueue 🔍 8 admin ▾

Search [Reset Filter](#) 4 records found 20 per page < 1 of 1 >

ID	Create Date	Scheduled At	Send At	Status	Recipient Name	Recipient Email	FUE rule	Event	Order Number	Action
	From <input type="text"/> To <input type="text"/>	From <input type="text"/> To <input type="text"/>	From <input type="text"/> To <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7	Oct 16, 2019, 2:22:17 AM	Jan 1, 1970, 12:00:00 AM	--	Pending	New Customer	new_customer@gmail.com	Customer Registration	New Customer Signed Up	0	<input type="text"/>
6	Oct 16, 2019, 2:21:12 AM	Jan 1, 1970, 12:00:00 AM	--	Pending	Veronica Costello	roni_cost@example.com	Order Complete	Order Completed	000000085	<input type="text"/>
4	Oct 16, 2019, 2:19:09 AM	Jan 1, 1970, 12:00:00 AM	--	Pending	Veronica Costello	roni_cost@example.com	Order Invoice and Ship	Order Processing	000000087	<input type="text"/>
1	Oct 15, 2019, 3:44:30 AM	Jan 1, 1970, 12:00:15 AM	Oct 15, 2019, 7:01:55 AM	Pending	Veronica Costello	roni_cost@example.com	Order Created	Order Created	000000089	<input type="text"/>

### 3.5 Manage Coupon

This show all coupons that generate by **Follow Up Email** module.

Coupons 🔍 8 admin ▾

Search [Reset Filter](#) 7 records found 20 per page < 1 of 1 >

Code	Shopping Cart Rule	Send Date	Expiration Date	Customer Email	FUE Rule	Event	Email Queue Id	Status
	<input type="text"/>	From <input type="text"/> To <input type="text"/>	From <input type="text"/> To <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
PAD001X5DA5409E237DD	Spend \$50 or more - shipping is free!		--	roni_cost@example.com				Pending
2X5DA5702681E50			--	roni_cost@example.com				Pending
PAD001X5DA5A5204F483	20% OFF Ever \$20-plus purchase!*	Oct 15, 2019	Oct 18, 2019	demo20191014@gmail.com				Sent
2X5DA67E1D9BB11			--	roni_cost@example.com				Pending
4X5DA67E1DA8634			--	roni_cost@example.com				Pending
5X5DA67E980BE4A			--	roni_cost@example.com				Pending
6X5DA67ED92FF58			--	new_customer@gmail.com				Pending

### 3.6 Manage Histories Email

This show list emails that have been sent to client from **Follow Up Email** module.


History

🔍 🔔 0 👤 admin ▾

Search [Reset Filter](#) 2 records found

20 per page < 1 of 1 >

ID	Create Date	Scheduled At	Send At	Status	Recipient Name	Recipient Email	FUE rule	Event	Cancellation reason	Action
	From To	From To	From To							
3	Oct 15, 2019, 10:53:20 AM	Jan 1, 1970, 12:00:15 AM	Oct 15, 2019, 10:54:27 AM	Sent	Veronica Costello	roni_cost@example.com	Order Created	Order Created		
2	Oct 15, 2019, 7:07:18 AM	Jan 1, 1970, 12:00:00 AM	Oct 15, 2019, 8:24:24 AM	Failed	Veronica Costello	roni_cost@example.com	Order Invoice and Ship	Order Processing	Email roni_cost@example.com could not be sent.	

 But if installation requires some customization based on theme/layout then we will charge you for extra work. Hope you can understand this.