

Product Documentation

November, 2015



OrderFollowUp

OrderFollowUp in OpenCart, created by iSenseLabs

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Chapter 1: Introduction

Welcome! Thank you for your purchase of **OrderFollowUp**. This document will teach you all you need to know about the **OrderFollowUp** extension.

How to use this document

The information you need is divided into chapters. In some sections you might notice some of these two types of paragraphs:

Note: The blue paragraphs contain information which is good to be aware of. They are intended for all types of users.

Important: The red paragraphs contain important information, which we strongly advise users to read.



Chapter 2: Installation instructions

These installation instructions assume that you have either a fresh or a customized installation of OpenCart 2.0 or a newer version.

Warning: If your OpenCart is not a fresh installation, files and database backup is highly recommended.

- 1) Unzip the downloaded ZIP file into a new folder.
- 2) Login to your OpenCart admin panel and go to **Extensions > Extension Installer**. Upload the file **orderfollowup.ocmod.zip**, which is in the folder you created in Step 1.

Note: If you receive an error "*Could not connect as...*", this means that your OpenCart FTP settings are not properly configured, or FTP is not enabled on your server. To resolve this, follow these steps:

2.1) Go to **System > Settings > Edit > FTP** and update your FTP settings. After you are done, try uploading **orderfollowup.ocmod.zip** again. If it does not work and you receive the same error "*Could not connect as...*", follow the next step.

2.2) Go to this link:

http://www.opencart.com/index.php?route=extension/extension/info&extension_id=18892

and download and install Quickfix for the OpenCart Extension Installer. After you are done, try uploading **orderfollowup.ocmod.zip** again.

- 3) Go to **Extensions > Modules** and click the "Install" button on **OrderFollowUp**. This action should redirect you to your **Modifications** list.
- 4) If you, for some reason, do not get redirected to your **Modifications**, go to **Extensions > Modifications** and click the "**Refresh**" button on the top right in order to rebuild your modification cache. Otherwise, just click "**Refresh**".
- 5) Congratulations! **OrderFollowUp** is now installed.

Chapter 3: Getting started with OrderFollowUp

What is OrderFollowUp?

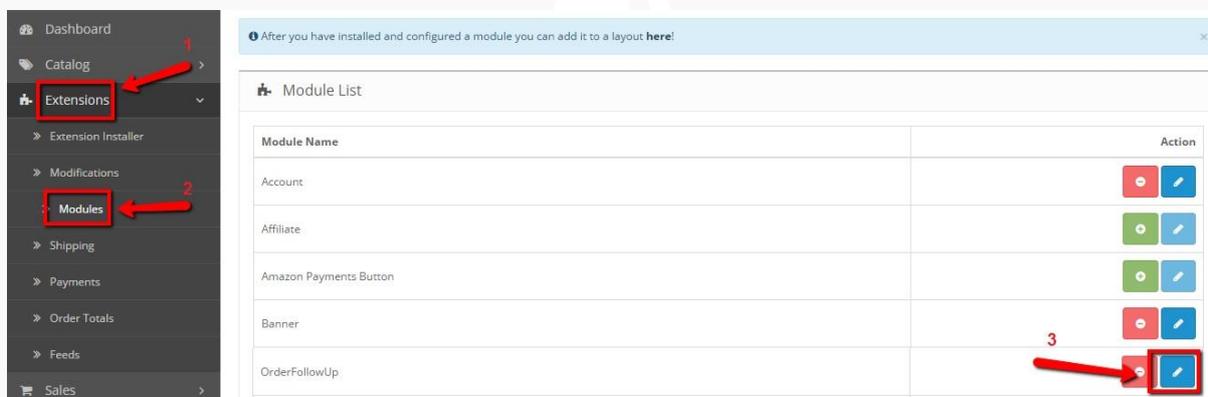
OrderFollowUp is an extension that allows you to create and send follow-up e-mails to customers upon a chosen order-related circumstance. This module is rated to be vital for tightening up the relationship with old customers by offering discounts and keeping new ones interested by advertising products.

Switching OrderFollowUp on

To activate the module, the first thing you need to do is go to its settings.

Accessing the module's settings

To access the module's settings, you should log in to your store's admin panel, then go to **Extensions ->Modules**, find **OrderFollowUp** and click the blue **Edit** button with the pencil in it.



Your module settings are initially divided into two tabs - **Control Panel** and **Support**.

Upon **Enabling** the module from the only drop-down menu field in **Control Panel**, another drop-down menu by the name of "**Keep log**" and a navigation bar tab labeled "**Add New FollowUp**" should appear. Click "**Add New FollowUp**" and a set of fields with a text editor at the bottom of the page will appear.

Congratulations! **OrderFollowUp** is now set and your first mail template is ready to be configured.

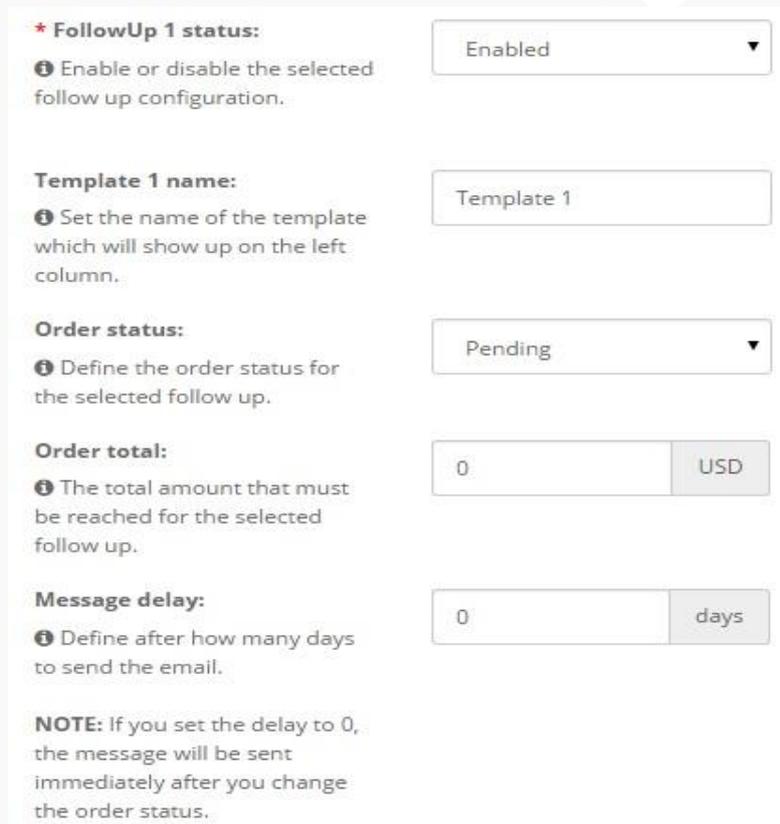
Chapter 4: Creating Mail Templates

In this chapter you will learn how to customize mail templates - give them unique names, determine whether they will provide the customer with a discount or not and define what events they will be sent on.

To start off, navigate to **OrderFollowUp's** settings. If you cannot remember how to do that, have a quick look back [here](#). Then, choose the **Control Panel** tab.

Template Settings

By clicking on "[Add New FollowUp](#)", you created your first mail template. It appeared in a new navigation bar tab named "**FollowUp 1**" by default. Along with that, many fields related to your template's settings became visible.



The screenshot shows the settings for 'FollowUp 1'. It includes a status dropdown set to 'Enabled', a text input for the name 'Template 1', an order status dropdown set to 'Pending', an order total input set to '0' with a 'USD' currency selector, and a message delay input set to '0' with a 'days' unit selector. A note at the bottom states: 'NOTE: If you set the delay to 0, the message will be sent immediately after you change the order status.'

FollowUp 1 status: This is a drop-down menu with two possible choices. It allows you to activate/deactivate the present template.

Template 1 name: This allows you to set a name for your template. The name will not be used in the e-mail that is sent to your customers. It is solely for backend organizational purposes.

Note: The number (1) is auto-incrementing for every new template.

Order status: This field is a drop-down menu and lets you choose when the given follow-up mail should be sent. The options in it refer to order statuses. For example, if you want customers to be automatically notified when their orders are shipped, you should select the "**Shipped**" option. That way, the module will supervise all your orders' statuses and will send e-mails to all customers, whose orders have been marked as "**Shipped**".

Order total: This field allows you to set a minimum price that an order should reach in order to trigger the given follow-up mail. This is great if you want to provide discount for customers,(and notify them about that) who have spent a certain amount of money in your store.

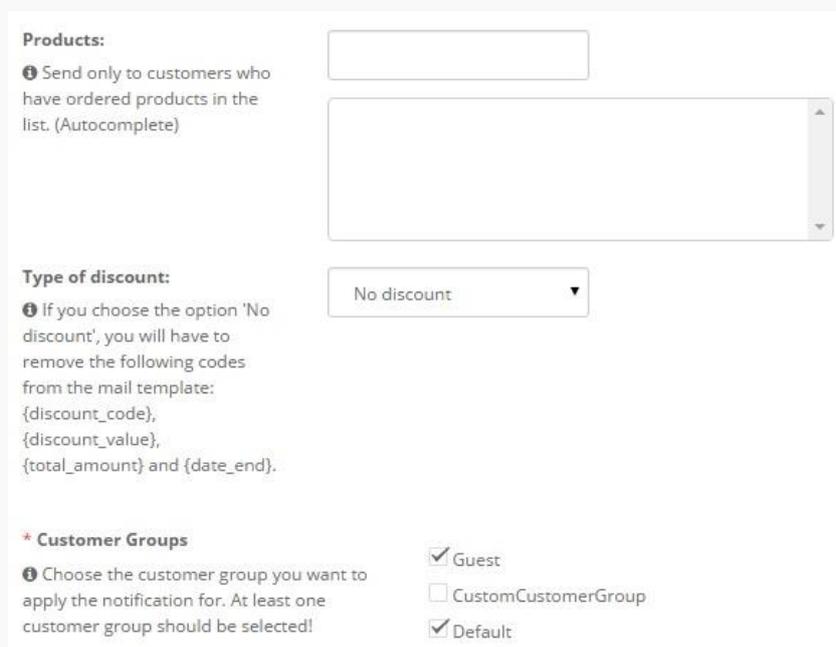
Note¹: The price will be in your store's default currency.

Note²:Set the price to 0 if you do not want to use this field's functionality.

Message delay: This field expects a number as an input and allows you to delay your e-mails with a set amount of days. For example, if you want your e-mail to be sent a day later than a given order triggers the follow-up, you should set it to 1 (You also need [CRON jobs](#) for that).

Note: Set it to 0 if you want your follow-up e-mails to be sent right away (you do not need [CRON jobs](#) for that).

Continuing with the next set of options:



The screenshot shows a configuration form with the following sections:

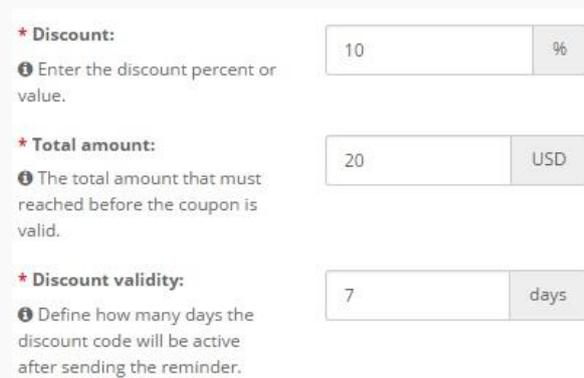
- Products:** A text input field and a larger text area with an autocomplete dropdown arrow.
- Type of discount:** A dropdown menu currently set to "No discount".
- * Customer Groups:** A section with a heading and a list of checkboxes: "Guest" (checked), "CustomCustomerGroup" (unchecked), and "Default" (checked).

Products: This option allows you to assign the present follow-up to orders of a given product (or set of products) only. The option consists of a field, expecting a product's name as an input and a window beneath it. It is enough for you to start typing the name of the product you want to assign the follow-up to and its name should appear in a drop-down menu (process known as auto-completion). Upon clicking on the product's name in the drop-down menu, it will be added to the window below. Do this for as many products as you like.

Type of discount: Here you get to choose whether to provide discount and if it will be in **Percents** or as a **Fixed Amount**.

No discount: Choose that option if you do not want to provide any discount.

Percentage & Fixed Amount: Upon choosing whichever of these, a set of 3 fields will appear:



* **Discount:** %
Enter the discount percent or value.

* **Total amount:** USD
The total amount that must be reached before the coupon is valid.

* **Discount validity:** days
Define how many days the discount code will be active after sending the reminder.

Discount: This field expects a number as an input. If you have chosen the **Percentage** option, it will be the discount value in percents and if you have chosen the **Fixed Amount** option, it will be the amount of the discount in your store's default currency (USD for the example).

Total amount: Same logic as the [order total field](#), except this time it is for the discount. You can set a minimum price (in your store's default currency) that an order should reach in order for the customer to be able to benefit from the discount.

Discount validity: Here you can set a deadline (in days), which the customer should meet if he/she wants to take advantage of the discount.

Customer Groups: This is a field with a number of checkboxes equal to the number of customer groups in your store. You can check the boxes of the customer groups you want to be notified and leave the boxes of those you want omitted unchecked.

Last but not least, the **text editor** for your e-mail:

Subject:

Message:
 ⓘ Use can use the following short-codes:

{first_name} - First name
 {last_name} - Last name
 {discount_code} - Discount code
 {discount_value} - Discount code
 {total_amount} - Total amount
 {date_end} - End date of coupon validity
 {order_id} - Order ID
 {order_products} - Show the ordered products

NOTE: You can also use {first_name}, {last_name} and {order_id} in the subject field.

Helvetica Neue
A

Hello {first_name} {last_name},

This is a sample follow up message! The products you ordered are: {order_products}

We would like to give you a special discount code - {discount_code} - which gives you {discount_value} O
 code applies after you spent {total_amount}. This promotion is just for you and expires on {date_end}.

Kind Regards,
 YourStore

<http://www.example.com>

This is where you will create the body of your follow-up message. You can use the text editor to style your e-mail, make hyperlinks, ordered and unordered lists, insert pictures and even video. Play around with it to get used to its features. If you have any problems applying any of them, feel free to use the [Support tab](#) and open a ticket, so **iSenseLabs** team can assist you.

Note: Check out the short-codes on the left. Use them to make your template applicable to all orders/customers. Each of the short-codes will be replaced by data of the given order/customer.

{first_name} - customer's first name

{last_name} - customer's last name

{discount_code} - the unique discount code he/she will receive

{discount_value} - this is the value of the discount (e.g. 20%)

{total_amount} - this is the total amount of the discount in your store's currency

{date_end} - the deadline for the discount

{order_id} - this represents the ID of the given order

{order_products} - this lists all the ordered products

Note¹: If you choose the "No Discount" option from the "Type of discount" field", the following codes will have to be removed from the template: {discount_code}, {discount_value}, {total_amount} and {date_end}.

When you are finished styling the template of your follow-up message, click the green **Save Changes** button.

Congratulations! You have created your first follow-up notification template.

Chapter 5: Schedule your messages using CRON Jobs

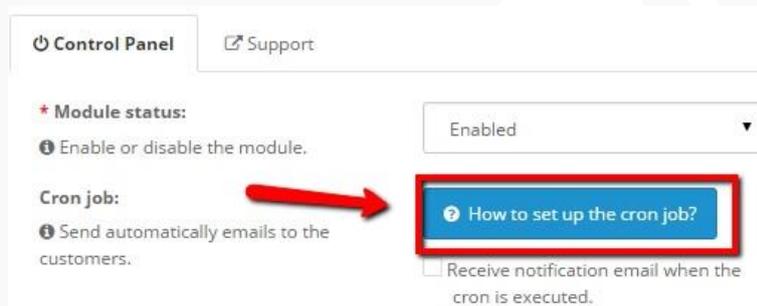
CRON is a time-based job scheduler in UNIX-like operating systems. By means of it, you can schedule tasks (messages, in our case), which are usually referred to as "CRON Jobs". Using CRON Jobs allows you to automate your messages and send a given follow-up automatically at a given moment in time.

Note: The explanations on how to set a CRON job here are for cPanel users. Though the process is similar for most web hosting control panels, it might have slight differences. If you need any help setting CRON jobs on a different control panel, feel free to contact [iSenseLabs support](#) team for assistance.

Important: If your server does not support CRON Jobs, you can try using services such as [easycron.com](#), [setcronjob.com](#) or others, which can provide you with this feature.

Setting a CRON Job

First off, you need to navigate to your module's [settings](#). Go to the **Control Panel** tab. Opposite of the second field ("Keep log"), you will find a button labeled "How to set up the cron job?".



Upon clicking it, a modal window will pop up. This window contains the command you need to activate the CRON job (shown in the picture below). Copy it.

How to set up the cron job? ×

If your server supports cron jobs, you can use this line to set up the cron job for the module:

- `0 0 * * * php /home/orderreviewsdemo/public_html/oc2/vendors/orderreviews/sendEmails.php` 

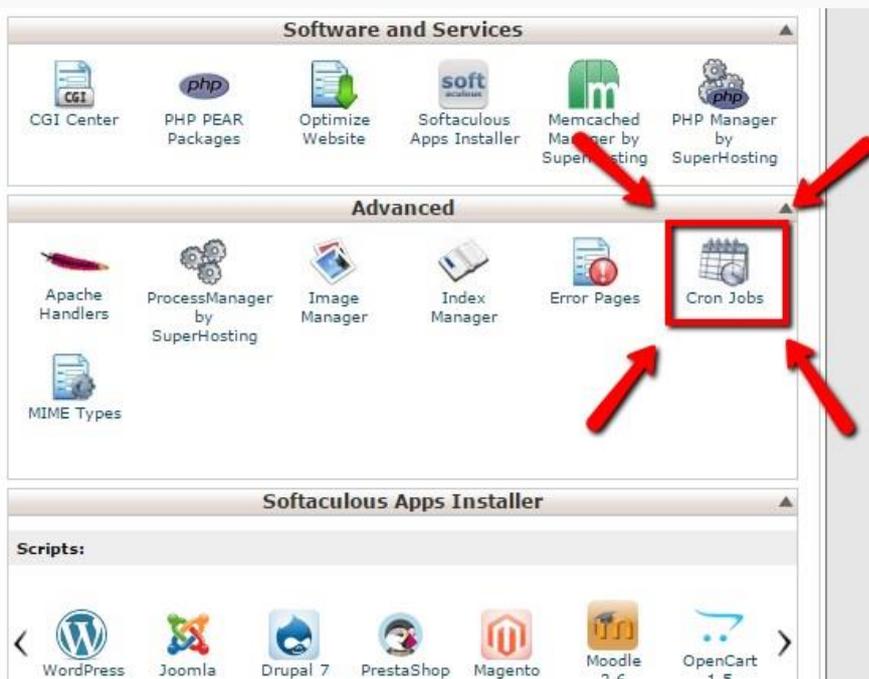
The script will be executed every day at 00:00.

If your server does not support cron jobs, you can try using services such as [easycron.com](#), [setcronjob.com](#) or others which can provide you this feature.

In order to do that, you have to register in the selected service and use this URL for execution:

- `- http://orderreviews.demo.isenselabs.com/oc2/vendors/orderreviews/sendEmails.php`

Now, navigate to your **cPanel**. In the **Advanced** section, find **Cron Jobs** and click it.



You will be redirected to the following page:

Cron Jobs

Cron jobs allow you to automate certain commands or scripts in your cPanel account. You can set a command or script to run at a specific time at a specified interval. For example, you could set up a cron job to delete temporary files weekly to free up disk space.

WARNING: You *must* understand Linux commands well before you can use cron jobs effectively. Ask your hosting provider to check your script for problems before you add a cron job.

Cron Email

Send an email each time that a cron job runs. [more >](#)

Add a New Cron Job

Common Settings: ▼

Minute: ▼

Hour: ▼

Days: ▼

Months: ▼

Weekday: ▼

Commands:

Current Cron Jobs

MINUTE	HOUR	DAY	MONTH	WEEKDAY	COMMAND	ACTIONS
No Cron Jobs						

[Home](#) | [Trademarks](#) | [Help](#) | [Documentation](#) | [Contact](#) | [Log Out](#)

To add a CRON job, you must first determine how often the CRON job should activate the e-mail-sending script. This is done from the "**Common Settings**" drop-down menu.

WARNING: Make sure you set the CRON job to at least "**Once per day**", otherwise you will end up spamming your customers with multiple e-mails a day.

Then, from the **Minute** and **Hour** fields, choose the given hour you want the CRON to run at (the values used for the example are 0 and 0, which means the CRON will run at 00:00 every day).

And last but not least, you should paste the command you [copied](#) earlier in the "**Command**" field. It should look something like this:

```
php /home/orderfollowupdem/public_html/oc2/vendors/orderfollowup/sendFollowUp.php
```

Important: Bear in mind the command should not include the "0 0 * * *".

Important: Keep in mind that some servers require the full path to the php extension, which on most of the servers is `usr/bin/php`. In such cases, you just have to change the beginning of the command from "php" to "usr/bin/php". If this does not make CRON jobs work, it means the php extension is at a different place (the path is not correct). In that case, contact your hosting provider for more information.

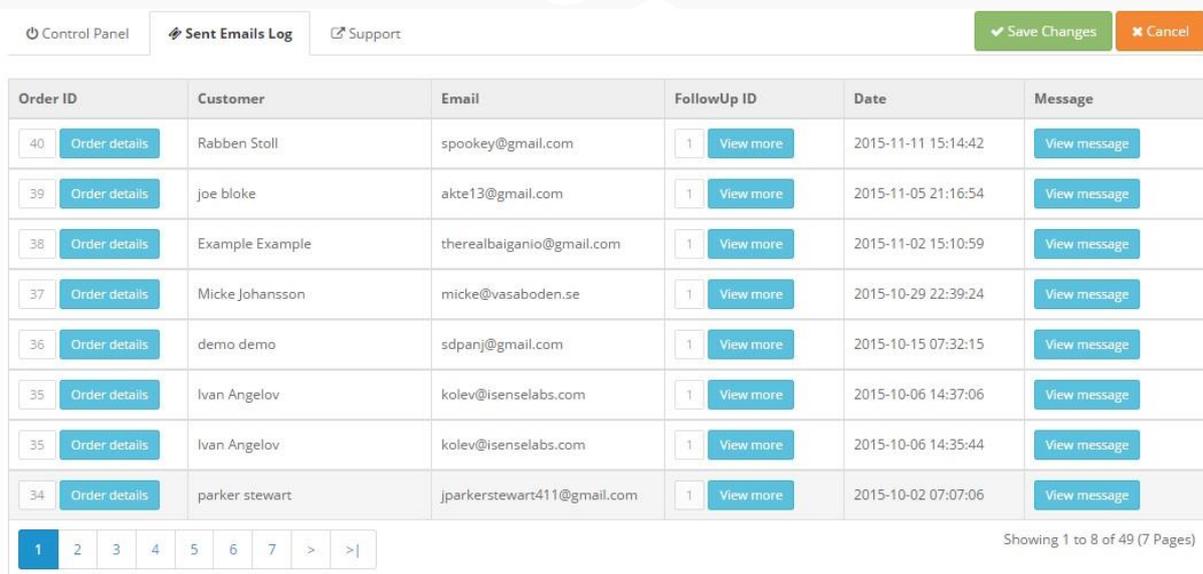
Once you have copied it, click the "**Add New Cron Job**" button and the CRON job you have been creating should appear in the "**Current Cron Jobs**" section below as shown:

Current Cron Jobs						
MINUTE	HOURL	DAY	MONTH	WEEKDAY	COMMAND	ACTIONS
0	0	*	*	*	php /home/orderfollowupdem/public_html/oc2/vendors/orderfollowup/sendFollowUp.php	Edit Delete

Congratulations! You have set up your CRON job.

Chapter 6: The Log Tab

There is an initially invisible tab within the module that keeps track of all sent e-mails and records them. To activate it, navigate to the module's [settings](#). In the **Control Panel** tab, the second field is "**Keep log**". It is a drop-down menu with 2 options - **Enabled** and **Disabled**. Upon **Enabling** it, a new tab by the name of "**Sent Emails Log**" will appear (between the **Control Panel** and the **Support** one). This is how it looks like:



Order ID	Customer	Email	FollowUp ID	Date	Message
40	Rabben Stoll	spookey@gmail.com	1	2015-11-11 15:14:42	
39	joe bloke	akte13@gmail.com	1	2015-11-05 21:16:54	
38	Example Example	therealbaigano@gmail.com	1	2015-11-02 15:10:59	
37	Micke Johansson	micke@vasaboden.se	1	2015-10-29 22:39:24	
36	demo demo	sdpanj@gmail.com	1	2015-10-15 07:32:15	
35	Ivan Angelov	kolev@isenselabs.com	1	2015-10-06 14:37:06	
35	Ivan Angelov	kolev@isenselabs.com	1	2015-10-06 14:35:44	
34	parker stewart	jparkerstewart411@gmail.com	1	2015-10-02 07:07:06	

Basically, it is a table with 6 columns:

Order ID: This column displays the ID of the order in the database. It also has an "**Order Details**" button, which redirects you to the order's details (also accessible from **Sales - >Orders ->View**).

Customer: This is the customer's name.

Email: This is his/her e-mail.

FollowUp ID: This is the ID of the FollowUp that has been sent to the customer. The "**View more**" button will take you to the given template's settings.

Date: The date the FollowUp has been sent on.

Message: The "**View message**" button from this column will open a modal window that will show you how the message you have sent exactly looks like.

Chapter 7: Uninstalling OrderFollowUp

This process describes how to uninstall **OrderFollowUp** from your store.

Warning: This action cannot be reversed. It is highly recommended that you create a file and database backup just in case.

To uninstall **OrderFollowUp**, navigate to **Extensions** -> **Modules** and find the **OrderFollowUp** module. In the **Action** column, there should be a red **Uninstall** button. Upon clicking it, you will be asked whether you are sure you want to proceed. Provided you say yes, the module will be uninstalled from your website.

Warning: Once you have uninstalled the module, you lose all the information related to it. That said, if you have not done the above-mentioned backup, there is no way to retrieve the deleted information.

Chapter 8: Getting support

Getting support

If you have a valid iSenseLabs license for the **OrderFollowUp** module, this means you have access to the iSenseLabs support system on the following address:

<http://isenselabs.com/users/support>

If you have any questions, comments or recommendations, feel free to open up a support ticket in our system (check out the **Support** tab of the module). A support specialist will assist you as soon as possible.

Thank you for using our product!

