

eMailChef for Magento: Package Tutorial

v. 2.7.5



emailchef.com

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1 Introduction

eMailChef is the perfect marketing tool to add an intuitive and solid eMail campaign solution to your Magento eCommerce.

The extension allows you to:

- transfer customers and orders relevant information to eMailChef dashboard;
- segment customers based on orders, abandoned carts, subscription date, etc.;
- synchronize Magento an eMailChef subscription status;
- increase sales with automated messages to reward loyal customers, recover abandoned carts, repeat purchases, engage inactive customers.

It supports custom customer fields synchronization, multiple stores and a scalable structure to support a big or growing eCommerce.

2 Installation

As with other Magento Extensions, installation can be performed through Magento Connect, via file upload or via FTP.

2.1 From Magento Connect

To install from Magento Connect please follow these steps:

- Locate the extension in Magento Connect:
<http://www.magentocommerce.com/magento-connect/emailchef.html>
- Register an account with Magento Connect, if you don't already have one
- Log into your account
- Click on Install Now
- If prompted to select the version of Magento Connect, select v2
- Check the check box to agree to the license agreement
- Click on "Get Extension Key"
- Click on "Select Key" to copy it to the clipboard
- Now log into your Magento admin console and navigate to System > Magento Connect > Magento Connect Manager
- Paste the Extension Key under Install New Extensions and click on Install
- Magento will retrieve the Extension automatically and will then prompt you to install it. Click on Proceed to do so.
- Magento will install the extension and show a success message. Click on Refresh and you should now see the extension listed under Manage Existing Extensions
- Scroll to the top and click on Return to Admin to return to your store admin console
- You may need to log out of the Magento admin and log back in to avoid permissions issues.

2.2 Via file upload

- Download the latest version from
<https://www.magentocommerce.com/magento-connect/catalog/product/view/id/31497/>
- Load it into the Magento Connect Manager using the Direct package file upload feature.
- This will trigger the installation of the extension.

- Click "Refresh" at the end of the installation step, and you should see eMailChef in the list of installed extensions.
- Scroll to the top and click on Return to Admin to return to your store admin console
- You may need to log out of the Magento admin and log back in to avoid permissions issues.

2.3 Via FTP

- Download the latest version from <https://www.magentocommerce.com/magento-connect/catalog/product/view/id/31497/>
- Log out of Magento
- Unpackage the *.tgz file onto your computer. if you received a *.zip file from us, unzip the file, and then unpackage again the *.tgz file
- Upload via FTP the two folders "app" and "skin" folders to your Magento root folder, which already contains two folders with the same names. In other words, you will be adding new folders and files to those two folders, which already exist. No files will be overwritten.
- Log into Magento and clear the Magento cache under System
- Logout and Log into Magento again
- You should be able to use the eMailChef extension

3 Settings

The screenshot displays the Magento Admin Panel interface. At the top, the navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Mobile', 'Customers', 'Promotions', 'Newsletter', 'CMS', 'Reports', 'System' (highlighted), and 'Quelldorei'. A search bar and user information are also visible. The left sidebar shows a 'Configuration' menu with categories like 'GENERAL', 'ITALIAN LOCALIZATION', 'CATALOG', 'QUELDOREI', 'iwd EXTENSIONS', and 'CUSTOMERS'. The main content area is titled 'Settings & Field Mapping' and contains two sections: 'eMailChef Extension Settings' and 'eMailChef Field Mapping'. The 'eMailChef Extension Settings' section includes fields for 'Email' (youraccount@domain.com), 'Password' (masked), 'Test Connection' (button), 'List' (eCommerce List), 'Default Group' (Default), 'Enable subscription checkbox during checkout' (No), 'Enable Automatic Data Export to eMailChef' (Yes), 'Order Statuses to Match For Customer Totals' (Canceled), 'Server Timezone' (UTC), 'Export Frequency' (Hourly), 'Export Offset (in hours)' (0), and 'Enable Module Debugging Log' (Yes). The 'eMailChef Field Mapping' section shows a table for matching Magento customer attributes with eMailChef attributes: Name (first_name), Last (last_name), Email (email), and Company (Company). A 'Save Config' button is located at the top right of the settings area.

After installing the extension, its options can be configured through the admin console by visiting Newsletter > eMailChef > Settings & Field Mapping (also available at System > Configuration > Settings & Field Mapping).

By using the store switcher on the top left, it is possible to set every settings at the store view level or above.

To enable the extension it is necessary to fill these required fields:

- Email
- Password

- List
- Default Group

Follows a list of the available settings:

Setting	Description
Email	Email used to log into eMailChef.
Password	Password used to log into eMailChef.
Test Connection	Tests if the above credentials are valid.
List	Represents the list in which all Customers will be subscribed to, by default. If this list does not show, please check if the Email and Password have been entered correctly.
Default Group	Default Group / Segment in which registered users will be added.
Enable subscription checkbox during checkout	Select yes to display the newsletter sign up checkbox during checkout.
Enable Automatic Data Export to eMailChef	Select yes to automatically export customers from Magento to eMailChef
Order Statuses to Match For Customer Totals	Select the order status(es) that should be used by the Extension to be considered an order as a purchase with regard to data transfers and customer segmentation.
Server Timezone	Current server set timezone
Export Frequency	How often data will be updated and exported.
Export Offset (in hours)	Transfers happen at midnight (midnight for the server where the store is hosted) and thereafter (e.g. every six hours will happen at 12:00am, 6am, etc.) This setting allows you to introduce a delay. For example, if you set it up for a daily transfer, the Server

	Timezone is UTC, but you want the transfer happen at 4am UTC, you will want to set the offset at 4 hours.
Enable Module Debugging Log	Enable the debugging log if you are experiencing any problems and need to communicate with our support team.

3.1 Field mappings

After connecting the store, Magento customer fields have to be mapped with eMailChef. The eMailChef Field Mapping section and the Custom Customer Attributes section just below allows this mapping.

eMailChef Field Mapping		
Matching Magento customer attributes (on the left) with eMailChef attributes (on the right)		
Name	first_name	[STORE VIEW]
Last	last_name	[STORE VIEW]
Email	email	[STORE VIEW]
Company	Company	[STORE VIEW]
Address	Address	[STORE VIEW]
City	City	[STORE VIEW]
ZIP	ZIP	[STORE VIEW]
Province	Province	[STORE VIEW]
Region	Region	[STORE VIEW]
LatestAbandonedCartTotal	LatestAbandonedCartTotal	[STORE VIEW]
LatestAbandonedCartDate	LatestAbandonedCartDate	[STORE VIEW]
LatestShippedOrderDate	LatestShippedOrderDate	[STORE VIEW]
LatestShippedOrderID	LatestShippedOrderID	[STORE VIEW]
AllOrderedProductIDs	AllOrderedProductIDs	[STORE VIEW]
LatestOrderCategoryIDs	LatestOrderCategoryIDs	[STORE VIEW]
TotalOrderedLast30d	TotalOrderedLast30d	[STORE VIEW]
TotalOrderedLast12m	TotalOrderedLast12m	[STORE VIEW]
TotalOrdered	TotalOrdered	[STORE VIEW]
LatestAbandonedCartID	LatestAbandonedCartID	[STORE VIEW]
Fax		[STORE VIEW]
DateOfBirth		[STORE VIEW]
Gender		[STORE VIEW]
Country		[STORE VIEW]
CustomerID		[STORE VIEW]
Phone		[STORE VIEW]
LatestOrderAmount	LatestOrderAmount	[STORE VIEW]
LatestOrderDate	LatestOrderDate	[STORE VIEW]
LatestOrderID	LatestOrderID	[STORE VIEW]
LatestOrderProductIDs	LatestOrderProductIDs	[STORE VIEW]

Custom Customer Attributes		
Matching custom Magento customer attributes (on the left) with eMailChef attributes (on the right)		

The left part shows Magento customer fields while the right section shows eMailChef customer fields. eMailChef list fields can be customized by following this guide: <http://emailchef.com/knowledge-base/custom-fields/>

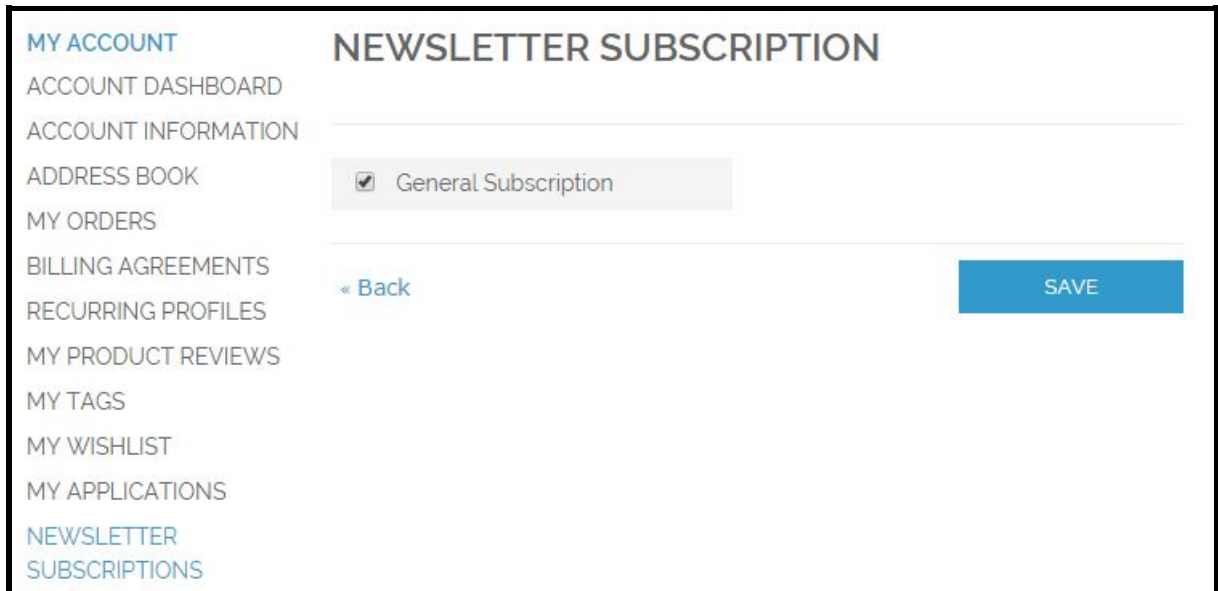
If you add a new field to eMailChef, it may take a few minutes before it can be seen in this page. That's because Magento caches information to speed up the system.

To immediately see the updated list of fields, cache can be flushed under System > Cache Management in Magento administration panel.

4 Integration with Magento Newsletter Subscription

The extension synchronizes newsletter subscription preferences between Magento Newsletter System and eMailChef.

If a customer opts to receive the newsletter during suscription, checkout or in his account panel, he is automatically added to your eMailChef contacts list.



The screenshot displays the 'MY ACCOUNT' section of a Magento storefront. On the left is a vertical navigation menu with links: ACCOUNT DASHBOARD, ACCOUNT INFORMATION, ADDRESS BOOK, MY ORDERS, BILLING AGREEMENTS, RECURRING PROFILES, MY PRODUCT REVIEWS, MY TAGS, MY WISHLIST, MY APPLICATIONS, NEWSLETTER, and SUBSCRIPTIONS. The main content area is titled 'NEWSLETTER SUBSCRIPTION'. It features a single checkbox labeled 'General Subscription' which is checked. Below the checkbox is a '< Back' link on the left and a blue 'SAVE' button on the right.

Customer email is transferred immediately, while customer data are sent during the next scheduled eMailChef data transfer.

If the customer opt-out from his Magento Account Area or is unsubscribed by the administrator, his contact will be immediately deleted from the default eMailChef contacts list.

If the customer opt-out from eMailChef newsletter (eg. by using the unsubscribe link on the bottom of emails), the next time he logs into Magento he will be automatically unsubscribed from the Magento Newsletter (this is the only case in which a delay may happen in the synchronization if the customer does not log in frequently). The same happens if a contact is set as unsubscribed from the eMailChef administration panel.

5 Customer Segmentation in Magento

Sync/segment Customers
Sync/segment Customers

[View saved filters =>](#)

Create custom segments using the filters below and easily transfer them to a new or existing Group in your eMailChef account.

Store
Default ▼

Purchase History
 All customers Customers who have purchased Customers who have not purchased

Opt-in Status
 All customers Opted-in Only Non Opted-in Only

Groups
Select customer group: General ▼

Location
Select country: -- Any -- ▼
Zip code: (e.g. 12345)

Products and categories
Products whose SKU contains...: PRODUCT1 (e.g. MYSKU123)
Products that belong to this category...: -- Any -- ▼

Subscription date
Between: (M/d/yyyy)
And: (M/d/yyyy)

Total purchased amount
Customers who have ordered: more than ▼ (e.g. 50)

Purchase timeframe
Show customers who: purchased ▼

By using Newsletter > eMailChef > Sync/Segment Customers it is possible to manually transfer customer data and segment them by using a number of variables and optionally putting them in a new group (instead of the default one).

This is very useful as there are some customer information that can't be transferred to eMailChef contacts attributes. For example it is possible to create a segment based on customer's order history. Available filters are:

- **store:** segment based on which store the customer was created in;
- **purchase history:** quickly segment based on whether customers purchased or not. The definition of what a purchase is depends on the order statuses that you selected in the settings;
- **opt-in status:** filter customers that have vs. have not opted to receive emails from the store;
- **groups:** select a customer group;
- **location:** filter based on country and/or zip code;
- **products and categories:** filter based on purchase of a specific product (SKU) or product category;
- **total purchased amount:** segment customers that have purchased more, less, or exactly a certain amount;
- **purchase time frame:** restrict results to customers that have purchased or not purchased during a specific time period.

After creating your segment, you may have to wait some minutes to have it synchronized to eMailChef Dashboard.

6 Upgrades

6.1 In case of installation from Magento Connect

- To upgrade the extension to a more recent version:
- Now log into your Magento admin console and navigate to System > Magento Connect > Magento Connect Manager
- Scroll down to the section to Manage Existing Extensions
- Click on Check for Upgrades
- If an upgrade is available, it will be retrieved from Magento Connect and you will be able to select which version to install and proceed with the installation.
- Magento will install the new version of the extension and show a success message. Click on Refresh and you should now see the upgraded extension listed under Manage Existing Extensions
- Scroll to the top and click on Return to Admin to return to your store admin console
- You may need to log out and log in again in Magento Administration to see changes

6.2 In case of file or FTP upload

Follow the same steps of installation.

In case of FTP upload please:

- remember to overwrite files during upload;
- upload the app/etc/modules/EMailChef_EMailChefSync.xml at the end.

7 Debugging and Troubleshooting

7.1 Common problems

Installation problems

In case of 404 errors, to logout-login into the Magento Admin Panel as an administrator. In case of other errors, eg. new menu not appearing, no options for list, group or field mapping, remember to clear the Magento Cache and reload the page.

Getting help

In case of other errors, reach as after enabling logging to understand what is happening as follows.

Enable Magento logging:

- Log into the Magento Admin Panel
- Navigate to System > Configuration > Developer > Log Settings
- Chose "Yes" on the "Enabled" option and save the configuration.
- Make sure the directory {base_dir}/var/log exists. If it doesn't, create the directory and give it read/write permissions.

Enable eMailChef Extension logging:

- Log into the Magento Admin Panel
- Navigate to Newsletter > eMailChef > Settings & Field Mapping.
- Chose "Yes" on the "Enable module debugging log" and save the configuration.
- Once the issue has been resolved, we recommend disabling logging.

Data transfers not occurring

If everything is setup correctly in the settings section of the plugin, this is normally due to a problem with the magento cronjob missing, please check official Magento documentation at:

<http://devdocs.magento.com/guides/v2.0/config-guide/cli/config-cli-subcommands-cron.html>.

7.2 Tasks and Logs

This extensions provides 3 views that can be useful to debug problems and check its behaviour:

- **Tasks:** shows tasks that have been queued up by the eMailChef Extension; It is also possible to trigger the task manually by selecting the Run option from the Action drop-down menu.
- **Task Data:** contains the details of each task in the previous view (look up using the Task ID). It also shows a list of the IDs of synced customers.
- **Logs:** for advanced users only, shows exactly what happened when a certain task was run.