



# eMailChef Module for Magento 1

eMailChef is the easiest email marketing platform to use on the market. It offers a complete set of tools and an intuitive interface to provide a unique touch to your newsletters and keep users always satisfied.

Magento is an open source CMS for e-commerce that was launched on March 31, 2008.

In this manual you will find instructions for configuring and using the eMailChef plugin correctly.

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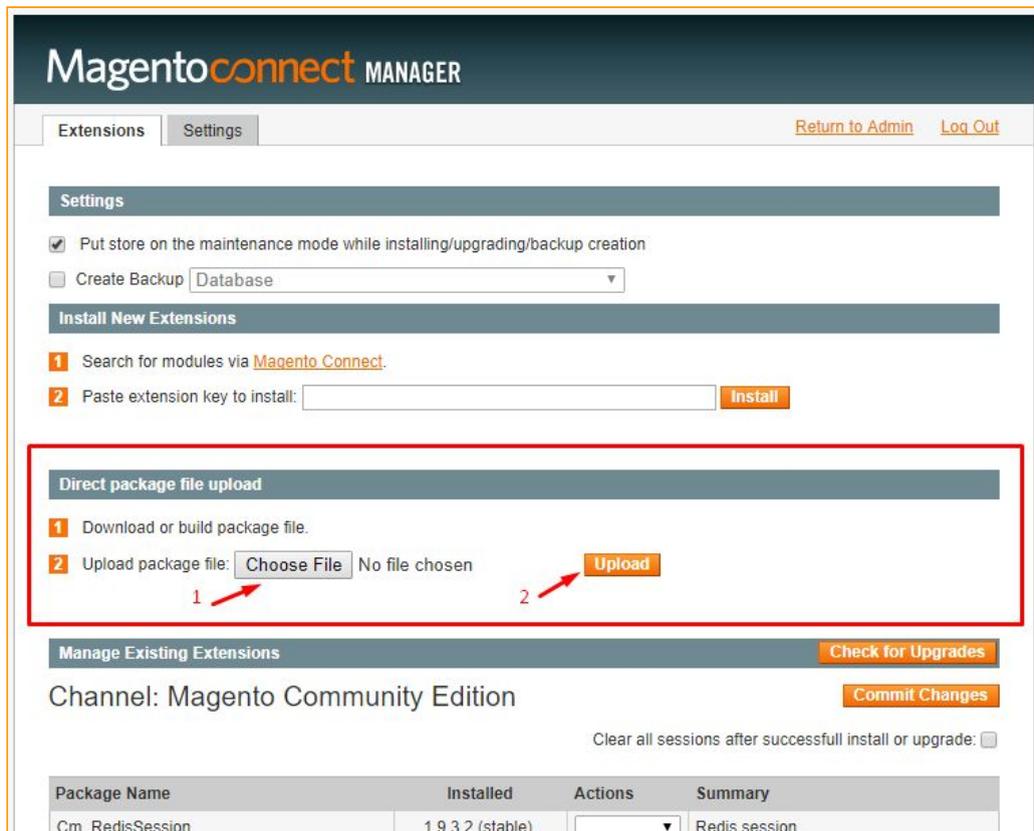
## 1 Minimum requirements and installation

In order to be able to use the form properly, make sure you have Magento installed (minimum version required: 1.7), further minimum requirements can be found on

<http://devdocs.magento.com/guides/m1x/system-requirements.html>

## 2 Installation of the module

### - via Direct File upload



- Download the latest version from <http://emailchef.com/email-marketing-with-magento/>
- Login to your **Magento Connect Manager** (navigate inside your admin panel: System > Magento Connect > Magento Connect Manager)
- If you have **installed an eMailChef's extension before November 2017, uninstall it** first before you proceed with this installation
- To upload the new extension go to **"Direct package file upload"**
  - 1) then press the button "Choose File"
  - 2) Press "Upload" (note: The button "Upload" 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



- Go back to your store admin panel

- Now you must **clear the system cache**, you can proceed in two ways:

1) From your backend click on System> Cache Management and then click on Flush Magento Cache and Flush Cache Storage



2) If Magento returns errors, you can manually delete the cache by removing the entire contents of the /var/cache folder via FTP.

- To see correctly the extension inside your Store Admin Panel and to avoid permission issues, you may need to log out of the Magento Admin and log back in.

### - via FTP

- Download the latest version from <http://emailchef.com/email-marketing-with-magento/>
- Log out of Magento
- Extract the .tgz file containing the module on your computer
- Load the folders "app", "skin" and "js" in the Magento root folder. Your Magento installation already contains these folders, only the archive files will be added.
- Load the etc folder inside the epp/etc folder in your Magento installation; also in this case the files will simply be added and nothing overwritten.
- Now you must clear the system cache, you can proceed in two ways:

1) From your backend click on System> Cache Management and then click on Flush Magento Cache and Flush Cache Storage



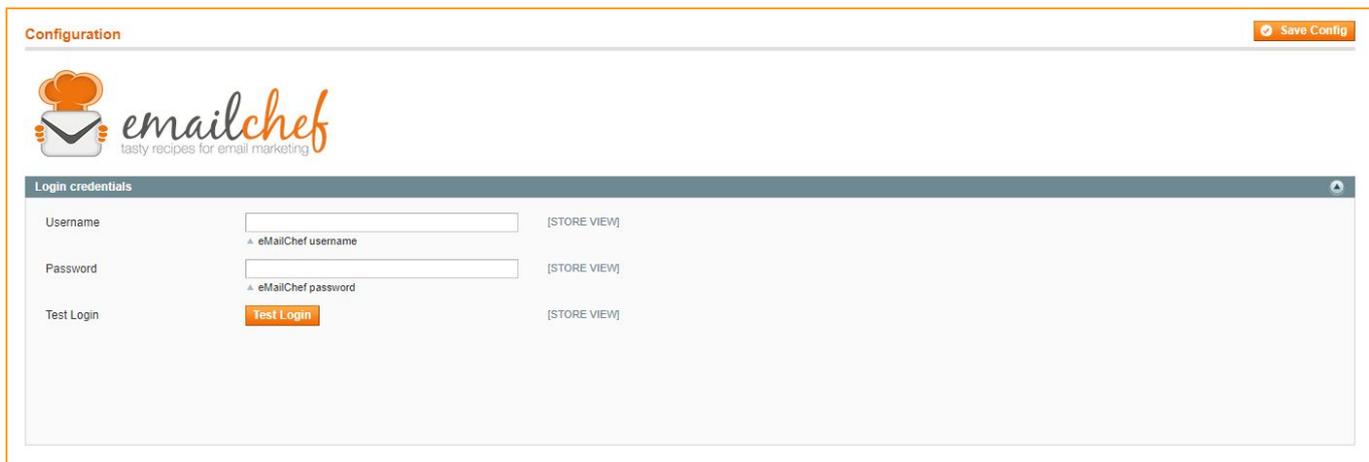
2) If Magento returns errors, you can manually delete the cache by removing the entire contents of the /var/cache folder via FTP.

- Now log out of Magento
- You can now use the module for Magento

Note:

To access the configuration after the first installation you will need to click on **System> Configuration** and once **EMAILCHEF** is located on the side menu, click on **Configuration**.

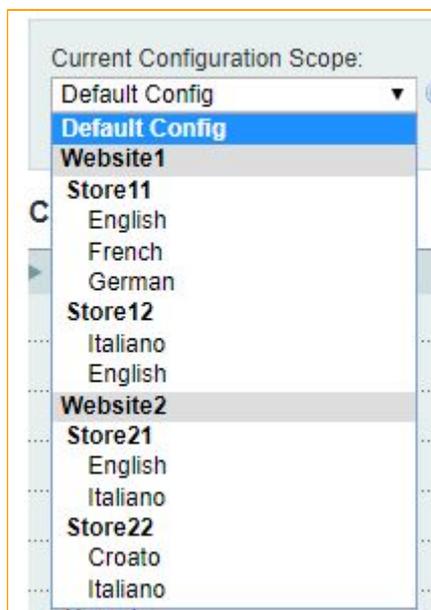
### 3 Configuration



You will find the configuration wizard by clicking on **System> Configuration** and once **EMAILCHEF** is located on the side menu, click on **Configuration**.



#### 3.1) Choosing the scope of configuration



The module is set up to synchronize Magento Multi-Store and Multi Website customers, from the top-right menu option you can choose to set the configuration for each Store View within your ecommerce.

Keep in mind that:

- The **standard configuration** allows you to configure your destination list on eMailChef globally.  
*In this case, the initial synchronization will synchronize the data of all customers in the shop regardless of whether they belong to a particular website or store.*
- The **Website configurations** (example *Website1* and *website2*) allow you to configure multiple destination lists on eMailChef with the ability to segment already synchronized customers.  
*In this case, the initial synchronization will synchronize the data of all customers in a given Website.*
- The **Store Views configurations** (in the example *Italian* or *English*) allow you to further segment your profiled customers based on multiple ecommerce transactions on multiple stores (if any).  
*In this case, the initial synchronization will synchronize the data of all customers in a particular Store View.*

*Since Customers are not linked to a particular Store View but can freely circulate within a Website, some custom fields such as Store Name and Store View will be profiled starting from the last order placed.*

### 3.2) Authentication

Enter the eMailChef authentication data for the first time which will allow you to interface the module with the eMailChef platform.

Authentication through eMailChef account username and password will allow you to validate the necessary login to synchronize the module with eMailChef as well as to choose one of the lists inside or create a new one.

Username	<input type="text" value="prova@duelic.com"/>	[STORE VIEW]
	▲ eMailChef username	
Password	<input type="password" value="....."/>	[STORE VIEW]
	▲ eMailChef password	

Once you enter your credentials (emailChef username and eMailChef password) they will be checked.

Various status messages will indicate if the access data is valid or invalid, if invalid the set up will not be completed.

Username	<input type="text" value="prova@duelic.com"/>	[STORE VIEW]
	▲ eMailChef username	
Password	<input type="password" value="....."/>	[STORE VIEW]
	▲ eMailChef password	
Test Login	<input type="button" value="Test Login"/>	[STORE VIEW]

Incorrect login credentials: I dati di accesso sono errati.

If the credentials are correct, the message will be displayed in green and you can then choose a list already in the eMailChef account or create a new list that will be placed in the list index.

Username	<input type="text" value="test@domain.com"/>	[STORE VIEW]
	▲ eMailChef username	
Password	<input type="password" value="*****"/>	[STORE VIEW]
	▲ eMailChef password	
Test Login	<input type="button" value="Test Login"/>	[STORE VIEW]
<div style="background-color: #e0f0e0; padding: 5px; border: 1px solid #ccc;"> <p>You have successfully logged into eMailChef.</p> </div>		
List	<input type="text" value="Lista DEFAULT"/> Or <a href="#">create a new list</a>	[STORE VIEW]
Policy	<input type="text" value="Double opt-in"/> ▲ Which policy would you like to use?	[STORE VIEW]

### 3.3) Choosing a list

You can choose to synchronize to an existing list or create a new list.

List	<input type="text" value="Lista DEFAULT"/> Or <a href="#">create a new list</a>	[STORE VIEW]
<div style="background-color: #f4a460; padding: 10px; border: 1px solid #ccc;"> <p><b>Create new list</b></p> <p><input type="text" value="List name"/></p> <p>▲ List name</p> <p><input type="text" value="List description"/></p> <p>▲ List description</p> <p><i>By creating a new list, you confirm its compliance with the privacy policy and the CAN-SPAM Act.</i></p> <p><input type="button" value="Create list"/> <input type="button" value="Undo"/></p> </div>		

If you proceed to **Create a New List** you will need to provide a name (unique within eMailChef) and a description (optional) for the new list,

During this process, the new list will be created within the assigned eMailChef account.

### 3.4) Opt-in policy selection (optional)

The module offers account holders with eMailChef's "Executive policy" a choice of two opt-in policies:

1. The **double opt-in** policy available to all eMailChef accounts;
2. The **single opt-in** policy available to users with an Executive account.

If you do not have an Executive account you will not be able to select a policy type and will be automatically assigned the double opt-in policy.

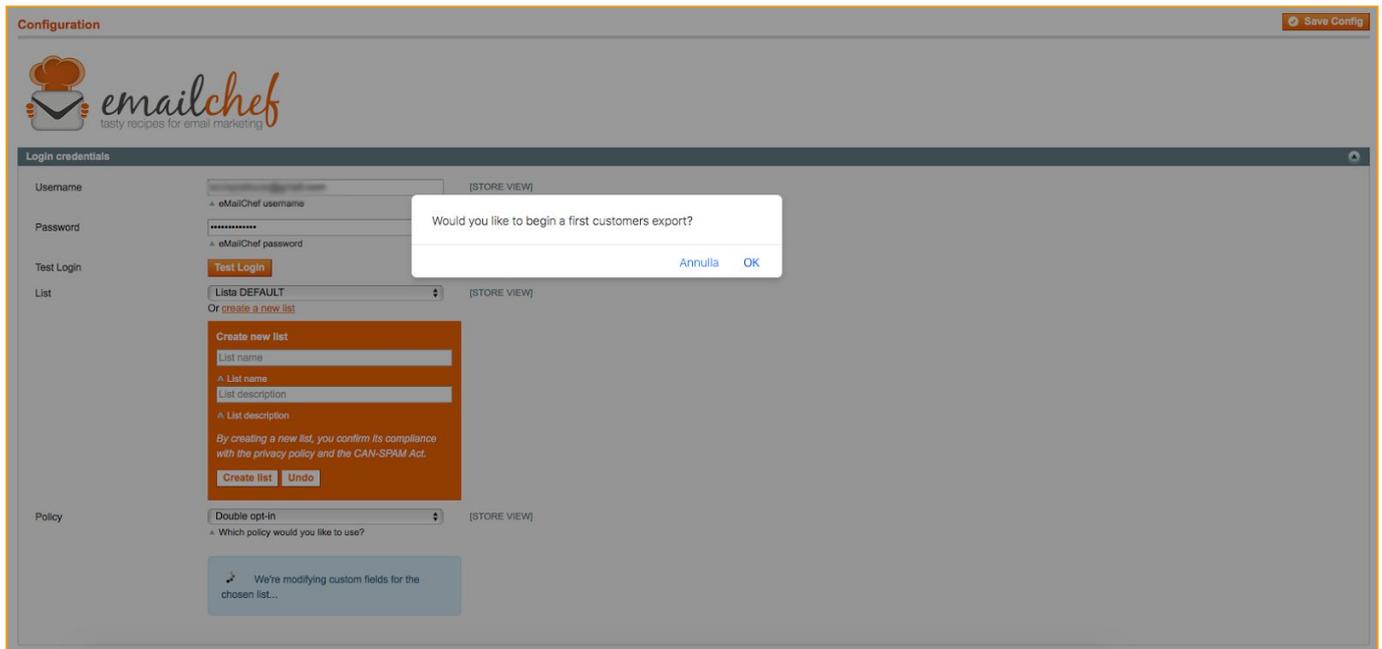
### 3.5) Save configuration and existing data export (from Magento DB to an eMailChef list/s of your account)

To complete the set up just click on the following button:



Clicking on the button **Save Config** will perform two operations:

- 1) The module configurations will be saved on Magento and Custom Fields will be initialized, adding non-existing ones and leaving unchanged those that are already present.
- 2) The data export of already existing contacts at the Store to the selected list on eMailChef will be started if the user confirms to do so.



## 4 Initial synchronization

If the user confirms to perform the first synchronization, a message will indicate that the data synchronization is in progress. This can take several minutes depending on the data load that needs to be synchronized. At the end, the form data will be saved and the module will be operational for subsequent synchronization.



*N.B.: Manual initial synchronization is precautionary when faced with eMailChef customers who have a maximum of contacts in their accounts and want to perform a Multi Store configuration avoiding duplication of data in the different lists.*

## 5 Synchronization of customers and orders

The synchronization of customers and orders takes place automatically using the Observer provided by Magento, which allows the transfer of data across the selected list in eMailChef in a very fast and instantaneous way, as well as being totally transparent to the customer.

## 6 Synchronization of abandoned carts

The synchronization of abandoned carts applies only for registered customers and is always done automatically. Within the module, abandoned carts are created for each customer that will last for 24 hours.

At the end of this timeout, data relative to abandoned carts will automatically be synchronized to the selected destination list on eMailChef