

EZ Auto Mailer

EZ Auto Mailer helps you to stay in touch with your customers. It is a transactional email system that will automatically send follow up emails based on events that happen on your site. Events supported are:

- Orders Placed
 - Any order
 - Specific Product Codes (one of a list specified in the event)
 - Order total greater than
 - Specific Payment Type
- Users Profiles
 - New Users
- Forms Submitted
 - Specific form feedback
- Abandoned Cart Reminders
 - Any age of an abandoned cart

Events are managed via an admin console that lists all the events, their names and their statuses. Each event has a detail page where more details for each event can be specified. The event details are specific to the event type. For example, an Order event can be set to trigger on a specific order status change.

Each event specifies a template to be used. A group of sample templates are distributed and should be good for most merchant's needs. However, you can copy them and rename them to customize them to suit your individual needs. Note that when copying, the first section of the template name associates it with a specific event type. These are (order, form, profile and cart).

When triggered, an event is queued to send an email to the recipient. The delay from the trigger is measured in days. For example you might want to send an email to a customer requesting they review your products 10 days after the order was shipped (time to get there and time to use). While another event might want to offer the customer a coupon code for returning to the site and purchasing again 2 days after the original purchase. The possibilities are endless. Note that abandoned cart events that trigger are always sent immediately.

The queue of emails to send can be processed via a cron job or setup to send upon an admin login (there is also a "Run Queue" link on the manage page). A cron job should be setup to run at the lowest frequency needed. For example, if you have an event to process abandoned carts that are 4hrs old, then the queue should be run every 4 hours. Otherwise, setting it up to run once a day in the middle of the night is probably preferred. Abandon cart events are run when the queue is run. This is the only trigger for abandoned carts.

Functional description (workflows)

When an order event is triggered, the specifics of that order event type are evaluated against the order. Each type (amount greater than, specific product, etc.) are separate events (though they can use the same template). If the criteria associated with the event is triggered (condition is met) the item is queued.

Details specific to the event are saved in the queue. When the queue is “run”, all pending items to send are sent if their “next send” date/time has been reached (the Days value in the event details from the time the event is triggered).

The email that a customer received will have information specific to the transaction. I.e. for Orders and Abandoned Carts, a list of products purchased (or left in the cart) are listed, with appropriate links back to the product detail pages. Templates that request reviews will provide a “star rating” link that will return the user to your site to enter reviews for all products from one page. If enabled, site testimonials are also able to be submitted on the same page. Note that templates can be customized to suit your needs.

By default (configurable in the addon settings) an unsubscribe link is placed at the bottom of the email. If clicked, the user will be returned to your site to confirm that they want to opt out of any further emails from EZ Auto Mailer. If they do opt-out, no future transactions will be queued for that email address and any emails currently in the queue that are pending to be sent will be removed.

A system wide coupon code can also be provided in the addon settings. In addition, an order minimum amount can be specified. It is up to the merchant to setup the coupon code promotion properly to reflect both the code and any minimum amount specified.

Installation and Configuration:

Installation is standard. There are no modified core files. Everything is implemented as hooks so impact of future cs-cart upgrades is minimal.

When you purchase the addon, an invoice will be sent that contains the license key. A separate email will be sent that allows you to download the installation archive.

- Login to your admin panel and choose Add-ons/Manage Add-ons
- Click the “+” icon which will prompt you to specify an installable archive. Use the archive you downloaded from our site from the email sent.
- After the addon installs, click the EZ Auto Mailer addon on the manage addons page.
- On the General tab, copy/paste the license key you were sent.
- Check the other setting on the General and other tabs to set things up as you want.

Choose Auto Mail from the Customers menu. This will take you to the Auto Mail manage page where you can see all the events that are enabled for your site as well as the general settings for each (name, status, etc.). On the right of each event there are links to Edit and Delete the event. And each event section has a link to add a new event of that type.

A number of sample events are provided and all are distributed as Disabled. Enable the ones you want or modify them to suit your needs.

All the event settings are pretty straight forward. An event may have options specific to that type of event at the bottom of the event detail page. For example, for an Order event that has a type of Products purchase, a text box will show that allows you to enter a comma separated list of product codes. Other events have their own options. One Order option takes a bit more to describe. This is the “Days X quantity purchased” option. Checking this checkbox will adjust the “Days” to delay sending to be relative to the quantity purchased. This is specifically for people who sell products that have a life span. I.e. selling vitamins that have 30 days supply per bottle; you might want to send them a purchase reminder 50 days after they purchased if they bought quantity 2. In this example, the “Days” value would be 25 and the quantity determines the actual days the email is queued to delay sending.

Utility Features

On the “manage” page, several links are available under the header of the page. These are:

- **Run Queue** – lets you manually run the queue to send emails to be sent
- **Show Pending Mail** – will list all the items queued that have not yet been sent
- **Show Sent Mail** – will list all items that have already been sent
- **Show Failed Mail** – list items that failed to be sent. These are items that failed within the addon itself or where the mail server has returned a failure status. It does not show mail that was sent but could not be delivered.
- **Auto-Mail Logs** – The last 100 entries of the log file. Logging level can be controlled in the addon settings.
- **Preview Templates** – Allows you to preview what any of the available templates should look like when received by your customers. Unfortunately, these preview will not find specific items for detailed event types like product codes. However, the general layout will show. An event of the type related to a template must be in the auto-mail queue for the preview to show.

When listing pending emails, a preview link is available that will display exactly what the customer will receive when that email is sent.

Customization of templates

If you want to customize templates, the easiest way is to copy one of the distributed templates and modify it to suit your needs. If you are an existing customer and have modified the distributed templates, please copy your changes to a new name and change your events to use the new template names. This will preserve your changes and prevent them from being overwritten.

Contact information

If you have any questions or need more detailed information, please contact us at support@ez-ms.com and we will be happy to help you.

Screen Shots

Admin area:

Addon Settings

← ▾ **EZ Auto-Mailer**

General Basic Settings Template Settings Deprecated Settings

Addon Configuration ▾

License key (required):

Frequency for upgrade checks:

Automatic Installation:

Silent Installation:

VERSION 4.3.45 | 01/27/2016, 01:42

← ▾ **EZ Auto-Mailer**

General **Basic Settings** Template Settings Deprecated Settings

Send on login:

Default Order Status:

VERSION 4.3.45 | 01/27/2016, 01:42



EZ Auto-Mailer

General

Basic Settings

Template Settings

Deprecated Settings

Review Template ▾

Review TPL initial rating ⓘ:

Review TPL coupon code ⓘ:

Review TPL min purchase ⓘ:

Review TPL coupon discount ⓘ:

Unsubscribe on profile ⓘ:

Unsubscribe on checkout ⓘ:

Unsubscribe in email ⓘ:

Auto Mailer Admin

← -
Manage Auto Mail

[Run queue](#) | [Show pending mail](#) | [Show sent mail](#) | [Show failed mail](#) | [Auto-Mail Logs](#) [Preview templates](#)

Order Actions

Priority	Status	Name	Template	Email CC	Actions
0	Active ▼	Order processed	en/order_review_onsite.tpl ▼	<input type="text"/>	Edit / Delete
0	Active ▼	Order amount greater	en/order_placed.tpl ▼	<input type="text"/>	Edit / Delete
0	Active ▼	Order specific product	en/order_review_onsite.tpl ▼	<input type="text"/>	Edit / Delete

[New order action](#)

Profile Actions

Priority	Status	Name	Template	Email CC	Actions
0	Active ▼	New user	en/profile_welcome.tpl ▼	<input type="text"/>	Edit / Delete

[New profile action](#)

Form submission

Priority	Status	Name	Template	Email CC	Actions
0	Active ▼	Form submission	en/form_contact_feedback.tpl ▼	<input type="text"/>	Edit / Delete

[New form action](#)

Abandoned Cart Actions

Priority	Status	Name	Template	Email CC	Actions
0	Active ▼	4hr Cart	en/cart_abandoned.tpl ▼	<input type="text"/>	Edit / Delete

[New cart action](#)

← -
Show pending mail

[Back to Manage Auto Mail](#) | [Show sent mail](#) | [Show failed mail](#)

Send to	Event name	Action type	Object	Template	Send date	Sent date	Actions
support@ez-ms.com	Test order	Order placed	Order(136)	review_onsite	06/22/2018	not sent	Send / Delete / Preview
support@ez-ms.com	Test order	Order placed	Order(136)	review_onsite	06/22/2018	not sent	Send / Delete / Preview
support@ez-ms.com	Test order	Order placed	Order(136)	review_onsite	06/22/2018	not sent	Send / Delete / Preview
support@ez-ms.com	Test order	Order placed	Order(136)	review_onsite	06/22/2018	not sent	Send / Delete / Preview
support@ez-ms.com	Test order	Order placed	Order(136)	review_onsite	06/28/2018	not sent	Send / Delete / Preview

← -
Show pending mail

[Back to Manage Auto Mail](#) | [Show sent mail](#) | [Show failed mail](#)

Send to	Event name	Action type	Object	Template	Send date	Sent date	Actions
support@ez-ms.com	Test order	Order placed	Order(136)	review_onsite	06/22/2018	not sent	Send / Delete / Preview
support@ez-ms.com	Test order	Order placed	Order(136)	review_onsite	06/22/2018	not sent	Send / Delete / Preview
support@ez-ms.com	Test order	Order placed	Order(136)	review_onsite	06/22/2018	not sent	Send / Delete / Preview
support@ez-ms.com	Test order	Order placed	Order(136)	review_onsite	06/22/2018	not sent	Send / Delete / Preview
support@ez-ms.com	Test order	Order placed	Order(136)	review_onsite	06/28/2018	not sent	Send / Delete / Preview



Manage Auto Mail

[Run queue](#) | [Show pending mail](#) | [Show sent mail](#) | [Show failed mail](#) | [Auto-Mail Logs](#)

Preview templates

- [en/order_review_onsite.tpl](#)
- [en/profile_welcome.tpl](#)
- [en/form_contact_feedback.tpl](#)
- [en/cart_abandoned.tpl](#)
- [en/order_placed.tpl](#)
- [en/order_review_products.tpl](#)

Distributed Email Samples (a few):

Review on site email

Demo Store

Simtech

6175556985

<http://www.example.com/>

Dear John,

Thank you for your recent order, we really appreciate your business.

If you get a chance, we'd really appreciate it if you could write a review for the products you've purchased . Please use the rating below to provide us a review.

Rate the products listed below:

☆ - Poor

☆☆ - Fair

☆☆☆ - Good

★★★★ - Very good

☆☆☆☆☆ - Excellent

Products you can review:



U0012O5AF0 - 100g Pants



Y0199F6AC6 - B.B. King - Original Greatest Hits CD

Sincerely,

Your friends at Simtech.

Visit us at: <http://www.example.com/>

Demo Store

Simtech

6175556985

<http://www.example.com/>

Greetings,

It looks like you left our site too early. We waited for you to finish checkout and wanted to send you a quick reminder about the products that are waiting for you. If you have any questions or we can help in any way, please contact us via email at simtech@example.com.

The following products are waiting for you. Please come back and purchase these great products by [clicking this link](#)



U0012O5AF0 -

[100g Pants](#)

Sincerely,

Your friends at Simtech.

Visit us at: <http://www.example.com/>