

Extension Module (XMOD): FollowUp for ClickCartPro

Table of Contents

Table of Contents	2
What is an XMOD?	3
What is FollowUp for ClickCartPro?.....	3
Requirements	5
Installing Followup.....	5
Using FollowUp	6
Kryptontronic Software End User License Agreement (EULA).....	9
Module Development	14

What is an XMOD?

A XMOD is an extension module developed by Kryptronic for the Hybrid X Core or a Hybrid X Core application software like ClickCartPro.

XMODs are developed to the highest standards to ensure proper and complete functionality using core components and Kryptronic coding techniques to ensure a stable, secure and optimized module.

The XMODs are cool plug-ins that instantly provide exciting new features for you and your customers.

What is FollowUp for ClickCartPro?

The ClickCartPro FollowUp module gives you the ability to reach out to your customers automatically after they have purchased items from your store. Attracting new customers can be expensive but retaining existing customers who have purchased from you in the past may now be accomplished at virtually no cost to you.

- The ClickCartPro FollowUp module allows you to create an almost unlimited number of FollowUps for any or all of your products. The FollowUps that you create may be tailored for each product and for each customer who will receive the FollowUp note. Each FollowUp message may contain a plain text message and, at your option, an XHTML formatted message.
- The ClickCartPro FollowUp module also supports the sending of a "one time" FollowUp which may be used, for example, to highlight a special offer related to other products that you sell.
- The FollowUp messages that you create may be sent from 1 day to years after a customer product purchase. Each message may be triggered by the purchase of a single product or be triggered by any product in a list of products.
- Each automatic FollowUp message will only be sent to a customer one time unless that customer returns to your store and purchases one of the products the FollowUp is configured for. If a customer has purchased multiple products that are configured for the FollowUp message they will only receive a single note.
- Once a FollowUp message has been sent for a product a customer has ordered, the product will be flagged so no additional FollowUp messages for that product will be sent. This avoids "flooding" a customer with notes.
- Sending a "one time" FollowUp message will ignore the FollowUp already sent flag so you may "reach out" to everyone who has purchased a specific product or products whether or not they have already received a timed FollowUp message.
- Every FollowUp message that is sent is E-Mailed directly to the customer using their name and e-mail address in the To: line to help avoid the FollowUp messages from being flagged as spam.

•Each automatic FollowUp message also provides customer and product information that you may use to personalize the message. The following customer information is available for you to use:

- ◆First Name
- ◆Last Name
- ◆Company
- ◆Address 1
- ◆Address 2
- ◆City
- ◆State/Province
- ◆Country
- ◆Postal Code

•The product information available to use in the FollowUp message includes:

- ◆itemid
- ◆itemname

•The customer and product information may be used in both the plain text and XHTML versions of the FollowUp messages. When the ClickCartPro FollowUp module is installed a sample FollowUp message is created which you may clone and modify to create your own personalized FollowUp message.

Requirements

This module has the following requirements:

- This module requires Hybrid X Core 6.6.7 or later.
- This module requires ClickCartPro 6.0.8 or later.

Installing Followup

After you have purchased the FollowUp XMOD it may be installed using the Krypton Software Installer. Access your installer via a URL similar to: (this example assumes that you have installed your shopping cart in a /khxc sub-directory.)

<http://www.yourdomain.com/khxc/installer.php>

To install this module follow these steps:

- Access your installer.php script and login. Submit through steps 1-5 without making changes to your installation configuration information.
- On Step 6 (PEAR Installation), choose 'No, do not reinstall/update PEAR modules'.
- On Step 7 (Hybrid X Core Installation), choose 'No, do not reinstall/update the Hybrid X Core codebase'.
- Submit through steps 8-11 without making changes to your installation configuration information.
- On Step 12 (Application Installation), choose 'Yes, reinstall/update applications(s)'. Leave the 'Overwrite all files' checkbox EMPTY. CHECK the 'Only install new applications and modules' checkbox. It is your option whether you choose to auto-submit the steps or confirm each one. Any application modules that have been updated since your last installer run will be updated.
- On Step 13 (Database Reload), choose 'Reload with recently changed definition files only'. It is your option whether you choose to auto-submit the steps or confirm each one. If any database definition files have been updated, only those files that have changed will be updated. Do not worry about losing data or the installer overwriting your data during a database reload. The installer is smart enough not to do that to you.

Using FollowUp

The first thing to decide is what product or products you would like to send FollowUp notes to. If you sell clothing and shoes for example you might decide that anyone who has purchased a particular blouse might also be interested in a new style of shoe that you've just started offering.

Once you've decided what product or products you are going to send FollowUp notes for you'll want to compose the FollowUp note. While you are composing the note keep in mind that there are several things that will be available to you to help personalize the notes.

The information available that you may use in FollowUp notes is:

- Customers first and last name
- Customers company name (which may be blank)
- Customers address information (including this level of detail in the FollowUp notes should be used with caution – some customers may be concerned or alarmed if you include their address details)
- List of product identifiers and product names that the FollowUp is being sent for – this allows you to specifically mention a product or products that a customer has previously ordered from you.

To help you compose your first FollowUp note and use the variables that provide the information outlined above we have included a sample FollowUp that you may clone to create your own personalized FollowUp. A copy of the text portion of the sample FollowUp message that is installed is shown below followed by a copy of the XHTML portion of the sample.

```
<?php
$app          = $this->globals('khxc.app');
$site_name    = $this->globals('khxc_settings.' . $app . '.site_name');
$custdata     = $this->globals('followup.custdata');
$item_info    = $custdata['itemdata'];
?>
This is a sample FollowUp.
```

```
Thank you for your recent order from <?php print $site_name; ?>.
```

```
The customers information is:
```

```
First Name: <?php print $custdata['fname']; ?>
```

```
Last Name: <?php print $custdata['lname']; ?>
```

```
Company Name: <?php print $custdata['company']; ?>
```

```
Address 1: <?php print $custdata['addone']; ?>
```

```
Address 2: <?php print $custdata['addtwo']; ?>
```

```
City: <?php print $custdata['city']; ?>
```

```
State/Providence: <?php print $custdata['stateprov']; ?>
```

```
Country: <?php print $custdata['country']; ?>
```

```
Postal Code: <?php print $custdata['postalcode']; ?>
```

The items they ordered that were found for this FollowUp are:

```
<?php
foreach ($item_info as $key => $ItemData) {
    print $ItemData['itemid'] . ' * ' .
        $ItemData['itemname'] . ' * ' . "\n\n";
}
?>
```

The XHTML portion of the sample FollowUp message:

```
<?php
$app          = $this->globals('khxc.app');
$site_name    = $this->globals('khxc_settings.' . $app . '.site_name');
$custdata     = $this->globals('followup.custdata');
$item_info    = $custdata['itemdata'];
?>
<p>This is a sample FollowUp message showing all of the information that is available
within a FollowUp message to customize the customer notes.</p>

<p>Thank you for your recent order from <?php print $site_name; ?>.</p>

<p>The customers information is:</p>

<br />First Name: <?php print $custdata['fname']; ?>
<br />Last Name: <?php print $custdata['lname']; ?>.
<br />Company Name: <?php print $custdata['company']; ?>
<br />Address 1: <?php print $custdata['addone']; ?>
<br />Address 2: <?php print $custdata['addtwo']; ?>
<br />City: <?php print $custdata['city']; ?>
<br />State/Providence: <?php print $custdata['stateprov']; ?>
<br />Country: <?php print $custdata['country']; ?>
<br />Postal Code: <?php print $custdata['postalcode']; ?>

<p>The items they ordered that were found for this reminder are:</p>

<?php
foreach ($item_info as $key => $ItemData) {
    print '<br />' . $ItemData['itemid'] . ' * ' .
        $ItemData['itemname'] . ' * ' ;
}
?>
```

Now that you have your first FollowUp ready to go, log into the admin area of ClickCartPro. In the ClickCartPro Menu on the left you will see a new entry at the bottom of the menu titled "XMOD: FollowUps". Click on that menu item and you will see that there are 2 options available:

1. **Configure FollowUps**- This is where you will go to create or modify FollowUp notes. Since you are creating your first one you may either clone the sample and modify it to match the contents created earlier or you may use the "Insert: Add a new row to this database table." option to create a new FollowUp from scratch.

All of the information for the FollowUp that you are creating is presented on the next page and everything on that page is self-explanatory. Two fields on that page to be aware of are the

"FollowUp is Active" field and the "Send XHTML FollowUp (In Addition to Text)" field. The first one allows you to turn a particular FollowUp on or off as needed. You may use a FollowUp for some period of time and decide that it is no longer needed. Instead of deleting it you may simply change it to inactive.

2. **Send XHTML FollowUp (In Addition to Text)**- This controls whether or not a HTML formatted note is sent along with a plain text version of the FollowUp. If you do not want to send notes with HTML simply set this field to False. If you will not be sending HTML FollowUp notes you do not need to worry about the information in the "XHTML FollowUp Include" field since it will not be used.

Important Note:

The "one time" FollowUp messages do **NOT** provide company, customer or product information. That information is only available for the automatic FollowUp messages.

WARNING: If your store already has a large number of completed orders for products that an automatic FollowUp is created for, the first time the CCP cron job runs it may take quite a while to complete.

If you want to start things off with a "clean slate" execute the SQL statement shown below **AFTER** the FollowUp module has been installed.

In CCP admin under Home > Hybrid X Core > Database: Connections, Backups and Raw Admin > Raw Database Admin, clicking on SQL Statement: Submit a Raw SQL Statement

```
UPDATE `ccp0_orderitems` SET `xmodfup_sent` = 1
```

If you are using the EU/UK version of ClickCartPro the SQL statement to execute is:

```
UPDATE `gbu0_orderitems` SET `xmodfup_sent` = 1
```

This will flag all of the current products ordered as having FollowUp messages already sent and avoid a potential "flood" of notes and the resulting delay when the daily CCP cron job runs the FollowUp module for the first time.

Kryptronic Software End User License Agreement (EULA)

END USER LICENSE AGREEMENT FOR THE KRYPTRONIC HYBRID X CORE (KHXC) AND KHXC-BASED KRYPTRONIC SOFTWARE PRODUCTS

KRYPTRONIC, INC. LICENSES THE KRYPTRONIC HYBRID X CORE SOFTWARE PRODUCT AND OTHER KHXC-BASED KRYPTRONIC SOFTWARE PRODUCTS TO YOU SUBJECT TO THE TERMS CONTAINED IN THIS END USER LICENSE AGREEMENT ("EULA"). READ THE TERMS OF THIS EULA CAREFULLY. BY INSTALLING, COPYING OR OTHERWISE USING THE SOFTWARE (AS DEFINED BELOW), YOU AGREE TO BE BOUND BY THE TERMS OF THIS EULA. IF YOU DO NOT AGREE TO THE TERMS OF THIS EULA, DO NOT INSTALL, COPY OR USE THE SOFTWARE.

NOTICE TO CUSTOMER

If you do not agree to the terms of this EULA, do not install, activate, or use this software. This EULA is a contract between you (either an individual or an entity) and Kryptronic, Inc. ("Kryptronic"), which governs your use of this Kryptronic software product that accompanies this EULA and related software components, which may include associated media, printed materials, and online or electronic documentation.

DEFINITIONS

This Kryptronic Hybrid X Core software package includes the Kryptronic Hybrid X Core ("KHXC") software product, related KHXC-Based Kryptronic software products designed for use with the KHXC ("KHXC-Based Software") and Open Source Software components. The KHXC software product is composed of a proprietary KHXC software and management interface component and other KHXC-Based Software. KHXC and KHXC-Based Software are referred to collectively herein as ("Software"). This software package may include sample programs or scripts ("Sample Programs"). You may use and distribute Sample Programs under the terms set forth in the applicable Sample Programs files. In this EULA, the KHXC, KHXC-Based Software products, associated media, printed materials, and online or electronic documentation are collectively referred to as the "Software."

"Open Source Software" means various open source software components, including, without limitation, PEAR and the following PEAR packages: Auth_SASL, Archive_Tar, Console_Getopt, File_Find, Mail, Mail_mime, Net_SMTP and Net_Socket, licensed under the terms of applicable open source license agreements included in the materials relating to such software.

An "Installation" means a single physical installation of the Software.

A software license key ("Software License Key") issued to you by Kryptronic is required to use the Software.

WARNING FOR EVALUATION LICENSEES

The Software can be activated with a no-cost evaluation Software License Key. Evaluation Software License Keys have an expiration date ("Expiration Date"). If you activate the Software with an evaluation Software License Key: (i) you may use the Software until the Expiration Date only to evaluate the suitability of the Software for licensing on a for-fee basis; and (ii) THE SOFTWARE IS PROVIDED TO YOU "AS IS" WITHOUT WARRANTY OF ANY KIND, WHETHER

EXPRESS, IMPLIED, STATUTORY, OR OTHERWISE. KRYPTRONIC BEARS NO LIABILITY FOR ANY DAMAGES RESULTING FROM USE (OR ATTEMPTED USE) OF THE SOFTWARE THROUGH AND AFTER THE EXPIRATION DATE, AND HAS NO DUTY TO PROVIDE SUPPORT TO YOU.

OPEN SOURCE SOFTWARE

The Open Source Software is composed of individual software components, each of which has its own copyright and its own applicable license conditions. You must review the licenses within the individual packages to understand your rights under them. The licenses can be found online at pear.php.net. Copyrights to the Open Source Software are held by the copyright holders indicated in the copyright notices found online at pear.php.net.

LICENSE

The Software is licensed, not sold. Subject to the terms and limitations of this EULA, Kryptonik hereby grants you a nonexclusive, nontransferable license, without rights to sublicense, to (i) Use the Software License Key to activate the Software to the extent permitted by your payment of applicable license fees (whether such fees are based on a single installation licensing model or any other Kryptonik approved licensing model); (ii) Install or have installed a single instance of the Software for each license fee paid; (iii) Use the Software in accordance with this EULA; (iv) Use the Software in a legal manner; and (v) Use the documentation accompanying the Software in connection with permitted uses of the Software.

LICENSE LIMITATIONS

You may not copy the Software except for a reasonable number of machine-readable copies of the Software for backup or archival purposes and except as expressly permitted in the License section above. You may not remove any titles, trademarks or trade names, copyright notices, legends, or other proprietary markings on the Software. You are not granted any rights to any trademarks or service marks of Kryptonik. Kryptonik retains all rights not expressly granted to you.

LICENSES REQUIRED FOR THIRD-PARTY SOFTWARE

The Software enables you to install third-party modules and extensions that further enhance its functionality. You are responsible for obtaining any licenses necessary to operate any such third-party software, and must accept any EULAs required to use the software.

KRYPTRONIC'S RIGHT OF ENTRY

You hereby authorize Kryptonik to access your web server in order to inspect the Software in any reasonable manner verify your compliance with the terms hereof.

PROPRIETARY RIGHTS RESERVED BY KRYPTRONIC

Kryptonik retains all right, title, and interest in and to the Software and the Software License Key and in all related copyrights, trade secrets, patents, trademarks, and any other intellectual and industrial property and proprietary rights, including registrations, applications, renewals, and extensions of such rights.

RESTRICTIONS

You may not (i) Sell, lease, license, sublicense, distribute or otherwise transfer in whole or in part the Software or the Software License Key; (ii) Provide, disclose, divulge or make available to, or permit use of the Software in whole or in part by, any third party without Kryptronic's prior written consent; or (iii) Modify or create derivative works based upon the Software without Kryptronic's prior written consent. Except to the extent expressly permitted by applicable law, and to the extent that Kryptronic is not permitted by that applicable law to exclude or limit the following rights, you may not decompile, disassemble, reverse engineer, or otherwise attempt to derive source code from the Software, in whole or in part. You may not disclose the results of any benchmark test of the Software to any third party without Kryptronic's prior written approval.

SUPPORT AND SUBSCRIPTION SERVICES NOT INCLUDED

Kryptronic will not provide any support services under this EULA. This EULA does not give you any rights to any updates or upgrades to the Software or to any extensions or enhancements to the Software developed by Kryptronic at any time in the future. You may purchase support and subscription services separately. If you have purchased Kryptronic support and subscription services with the Software, these services are provided to you under the Support Contract Terms and Conditions posted on Kryptronic's Web site, and by accepting the terms of this EULA you are accepting these Support Contract Terms and Conditions. Any supplemental software code or related materials that Kryptronic provides to you as part of any support and subscription services are to be considered part of the Software and are subject to the terms and conditions of this EULA. Kryptronic may use any technical information you provide to Kryptronic for any Kryptronic business purposes without restriction, including for product support and development. Kryptronic will not use information in a form that personally identifies you.

TERMINATION

Kryptronic may terminate this EULA if you fail to comply with any term of this EULA. In the event of termination, you must destroy all copies of the Software and Software License Key. In addition you must remove all copies of the Software from all computers and terminals on which it is installed.

GOVERNMENT RESTRICTIONS

You may not export or re-export the Software except in compliance with the United States Export Administration Act and the related rules and regulations and similar non-U.S. government restrictions, if applicable. The Software and accompanying documentation are deemed to be "commercial computer software" and "commercial computer software documentation," respectively, pursuant to DFAR Section 227.7202 and FAR Section 12.212(b), as applicable. Any use, modification, reproduction, release, performing, displaying, or disclosing of the Software by the U.S. Government shall be governed solely by the terms of this EULA.

LIMITED WARRANTY

Kryptronic warrants, for your benefit alone, that the Software conforms in all material respects to the specifications for the current version of the Software. This warranty is expressly conditioned on your observance of the operating, security, and data-control procedures set forth in the Software Documentation.

EXCEPT FOR THE PRECEDING EXPRESS LIMITED WARRANTY, TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, KRYPTRONIC PROVIDES THE SOFTWARE WITHOUT ANY WARRANTIES OF ANY KIND, EXPRESS, IMPLIED, STATUTORY, OR IN ANY OTHER PROVISION OF THIS EULA OR COMMUNICATION WITH YOU, AND KRYPTRONIC SPECIFICALLY DISCLAIMS ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT.

LIMITATION OF LIABILITY

TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT WILL KRYPTRONIC BE LIABLE FOR ANY LOST PROFITS OR BUSINESS OPPORTUNITIES, LOSS OF USE, BUSINESS INTERRUPTION, LOSS OF DATA, OR ANY OTHER INDIRECT, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES UNDER ANY THEORY OF LIABILITY, WHETHER BASED IN CONTRACT, TORT, NEGLIGENCE, PRODUCT LIABILITY, OR OTHERWISE. BECAUSE SOME JURISDICTIONS DO NOT ALLOW THE EXCLUSION OR LIMITATION OF LIABILITY FOR CONSEQUENTIAL OR INCIDENTAL DAMAGES, THE PRECEDING LIMITATION MAY NOT APPLY TO YOU.

KRYPTRONIC'S LIABILITY UNDER THIS EULA WILL NOT, IN ANY EVENT, EXCEED THE LICENSE FEES, IF ANY, PAID BY YOU TO KRYPTRONIC FOR THE SOFTWARE LICENSED BY YOU UNDER THIS EULA.

THE FOREGOING LIMITATIONS SHALL APPLY TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, REGARDLESS OF WHETHER KRYPTRONIC HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES AND REGARDLESS OF WHETHER ANY REMEDY FAILS OF ITS ESSENTIAL PURPOSE.

INJUNCTIVE RELIEF

You acknowledge that, in the event of your breach of any of the foregoing provisions, Kryptononic will not have an adequate remedy in money or damages. Kryptononic shall therefore be entitled to obtain an injunction against such breach from any court of competent jurisdiction immediately upon request. Kryptononic's right to obtain injunctive relief shall not limit its right to seek further remedies.

GENERAL

This EULA is governed by the laws of the State of Pennsylvania and the United States of America, without regard to conflict of law principles. The United Nations Convention for the International Sale of Goods shall not apply. This EULA is the entire agreement between us and supersedes the terms of any purchase orders and any other communications or advertising with respect to the Software. If any provision of this EULA is held invalid, the remainder of this EULA shall continue in full force and effect. This EULA may be modified only by written agreement signed by authorized representatives of you and Kryptononic.

CONTACT INFORMATION

If you have any questions about this EULA, or if you want to contact Kryptononic for any reason, please direct all correspondence to: Kryptononic, Inc., P.O. Box 7114, York, PA 17404, United States of America or email sales@kryptononic.com.

Kryptonicon, the Kryptonicon logo and all Kryptonicon software names and logos are trademarks of Kryptonicon, Inc. in the United States and/or various jurisdictions.

Module Development

This module was developed by Dave Martin, of Kryptronic, Inc.

Dave Martin has been part of the Kryptronic beta and development teams since 2006.

The codebase, which includes the library, modules and data architecture, are developed by solely by Kryptronic, Inc. and is distributed under license. Kryptronic software is not open source (GNU licensed), however the source code is delivered with Kryptronic software and is editable.