



Extension Module (XMOD): Followup

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What is an XMOD?

A XMOD is an extension module developed by Kryptontronic for our popular ClickCartPro/EuropaCart e-commerce software.

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

What is FollowUp for ClickCartPro/EuropaCart?

The ClickCartPro/EuropaCart 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/EuropaCart 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/EuropaCart 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/Providence
 - ◆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/EuropaCart 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 ClickCartPro/EuropaCart 7.0 or later.

Installing Followup

After you have purchased the FollowUp XMOD it may be installed using the Kryptronic Software Installer. Access your installer via a URL similar to:

<http://www.yourdomain.com/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 (Core Installation), choose 'No, do not reinstall/update the 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

$site_name = $this->globals('core_settings.core.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 customer's 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
$site_name = $this->globals('core_settings.core.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/EuropaCart. In the ClickCartPro/EuropaCart 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 System/Database/Raw Database Admin, clicking on SQL Statement: Submit a Raw SQL Statement

```
UPDATE `ecom_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.

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Module Development

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

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

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