



GREEN FLYING PANDA

SALES & MARKETING AUTOMATION SUITE FOR MAGENTO®

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THE EXTENSION

COMPATIBILITY

This extension is compatible with Magento 2.3.X, 2.4.X

HOW TO INSTALL

1. Log in to your Magento 2 admin interface
2. Go to "System/Web Setup Wizard."
3. Click "Component Manager"
4. Locate the module "Licentia_Panda" and choose to install

CHANGES

VERSION 1.1.0 - 2020-06-04

- Added support for Two-Factor Authentication for Admin
- Added Extension Issues Log
- Various bug fixes

VERSION 1.2.0 - 2020-07-06

- Added Segment Catalogs
- Added Prices per Customer
- Importing subscribers is now done through Magento native import section

VERSION 1.3.0 - 2020-08-12

- Added Schedule Import

VERSION 1.3.1 - 2020-12-07

- Added Email verification for two-factor auth

AFTER INSTALLATION

After a successful installation, in your store admin panel, you will see a few new menus:



- Customers /
 - Customer Segments
 - Customer KPI's
- Marketing
 - Marketing Automation
 - Autoresponders
 - A/B Campaigns
 - Campaigns
 - Follow-ups
 - Goals
 - Subscribers
 - Tags
 - Templates
 - Product Recommendations
- Content
 - Forms
 - Info Windows
- Reports
 - Panda Communications
 - Marketing Data Evolution
 - Campaigns Errors
 - Campaigns Coupons
 - Campaigns Conversions
 - Autoresponders Campaigns
 - Campaigns Links
 - Search History
 - Panda Sales
 - Orders
 - Expected Reorders
 - Prices Variation
 - Product performance
 - Product Relations
 - Veen Relations
 - Product Recommendations
 - Search Cloud
 - Search Performance
 - Search Venn Relations
 - Customers
 - Two-Factor Auth
- System



- Panda
 - Configuration
 - Senders
 - Support
 - Debug Info
 - Issues
 - Indexers
- Data Transfer
 - Import (Schedule)



EXTENSION CONFIGURATION

If you navigate to “System/Green Flying Panda/Configuration” you will be directed to the settings configuration page. There are six different subsections in the sidebar group “Green Flying Panda”.

GENERAL

Use ip-api.com GEO service – This extension uses an external service to load information about the user geo-location using ip-api.com service. They offer a free, limited queries. For unlimited info access using visitors IP you should consider subscribe to their premium service. Please note we are not affiliated with the specified service. If you need to use another for the same purpose, please contact us.

TWO-FACTOR AUTHENTICATION

This extension allows you to set up a two-factor authentication using SMS/E-mail for admin and frontend customers.

After performing the login operation, customers/users will be required to enter the confirmation code to continue browsing the store.

→ If the activated auth method is SMS and the customer does not have any cellphone defined, he will be asked to set up a new one.

You can force customers to use two-factor authentication or give them the option.

Customers will see in their account, when editing the profile, a field to change their phone number and, if enable, enable/disable two-factor authentication.

MARKETING AUTOMATION

Most options in this section are self-explanatory, listed below are the one that may cause some confusion.

Import Existing Customers – Use this option if you want to send campaigns, not only to subscribers, but also to customers. This option was added as an answer to companies that need to communicate with previous customers and the communication content is not considered marketing action, but as an expected communication from the company in response to an event. For example, when an order is shipped, payment received, product recall and similar. Please remember that use of this feature for Marketing Communications is forbidden on some countries.

When this option is enabled you will see an option when creating campaigns to select to whom you wish the campaign to be sent to.

Expected Reorder Time Attribute – This extension allows you to send re-order reminders to customers. If they purchase a new toothpaste today, most likely they need to by toothpaste again. This product attribute holds the value that defines the default value, in days, between purchases for that product. If the customer orders more than once, the extension will take in consideration the time between orders for that specific customer and ignore this attribute value. More info about this in the “Autoresponders” section in this document.

Import Current Magento Newsletter Subscribers – If your store already has subscribers, use this option to import them to the extension. Please note that you will only need to do this once.

Google Maps API – When view campaign reports, we use google maps to render customers geo-location. Google requires an API to render these maps. Their offer a free option, and that should be enough for your needs. Check this URL for more information:
<https://developers.google.com/maps/documentation/javascript/get-api-key>

CUSTOMER SEGMENTS

Access Control – If you want to restrict access to pages, categories, blocks, or products to segments in your store check this option. This option is most used for private sales.

Log Attributes – When you are building customer segments you can add several conditions, a few of them are related to the customer activity in the store. Conditions like “Bought Product with Attribute”, “Views Frequently Products with Attribute”, etc. When you choose one of those conditions, we will list all options for the attributes selected in this option. Imagine that you want to know the customer who visited/bought products from a certain brand or color. You should select the “Color” and “Manufacturer” attribute in the list shown. Please note that only attributes with the type “Select” are displayed.

Warning! These values are collected while the customer navigates in your store. If you change the attributes, results for those attributes will only take in consideration actions taken by customers since the date you changed the attributes. For example: If today you added the attribute “brand”, past views of that attributes for customers won’t be logged.

CUSTOMER EQUITY

Customer Equity Variables – These variables are used when building customer equity. These values vary from sector /company to sector/company. If you are not certain of these values, please ask someone in your company (financial department) values for these options.

- **Build Reports Attributes** – When you navigate to “Reports/Panda Sales/” you will find a few reports that might contain crucial information about your store and product performance. When view “product performance” reports you have the ability, not only to company performance per segment, but also by attributes. For example: I want to know how brands are performing between themselves. In that case

a heat map for attributes will be shown comparing key performance indexes between them. Choose in this option the attributes you want to build reports to.

- **Types of Reports to Build** - Choose the types of reports to build from the listed options.
- **Build Country Reports only for the selected countries** - Select all Countries to build reports for. If no country is selected, report will be built for all of them.
- **Build Region Reports only for the selected regions** - Select all Regions to build reports for. If no country is selected, report will be built for all of them.

→ We show reports to a few built-in segments, like sex, age, country, and region. When you create a new customer segment, you have the option to build reports for customers that are in that segment.

After changing the attributes in this section, you must rebuild all reports for the news option take effect. Please check the “General” section in the Green Flying Panda Configuration.

PRICING

This extension allows you to define dynamic pricing per products. That means that, if you want, each customer can have different product prices. You might want to use the customer equity information with other financial information and stats to generate the price for the customer.

Please check the Section “Dynamic Product Prices” in this document for detailed information.

FORMS

Email Entry Validation Template – When you create a new form, you might require customers to validate their entry in their email. In here you can choose the template that should be used to send the email message. You can add your own email template using the built-in Magento™ tool provided in “Marketing/Communications/Email Templates”

New Entries Notification – When a new entry is added to the form, add emails that should get a notification. If the entry requires email validation, you will be notified after the validation.

SENDERS

You must configure at least one Email sender before sending emails and one SMS sender before sending SMS campaigns. This is a simple step.

Go to "System/Panda/Senders".

You should see an empty table, but if you already have senders, you will see a list.

To add a new, click "New Email Sender" button and you will see a form like this:

New Sender

← Back Reset **Save**

SENDER INFORMATION

Sender Information

General Information

Name *

Email *

Use a email domain name associated with your SMTP server, otherwise your email will most likely be considered SPAM

Reply To *

The Reply To header for the email. Leave blank to use your Email Address

Server Information

Server Address *

Username *

Password *

Port *

Authentication *

None (ignore username/password)

SSL *

No SSL

Message Headers

One per line "name" (value)". E.g:
X-Mailer: PHP
Dynamic vars: (campaignId) (fromEmail) (fromName) (toEmail) (toName) (campaignName) (subject)

Bounces Configuration

Bounce Email Reception

Please insert an email to receive campaigns bounces.
WARNING: DO NOT use this email for anything else. We strongly recommend you to create an email account just for this purpose.
Emails in this inbox will be removed automatically

Server Address

Username

Usually the same as the bounce email

Password

Port

Authentication

None (ignore username/password)

SSL

No SSL

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Magento ver. 2.3.3
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Figure 1 - Senders – Add Email Sender

Although, in theory, you can define any email as a sender, we strongly recommend you use an email from your domain configured in your SMTP server, otherwise your email will most likely be considered SPAM.

ADD SMS SENDER

When in the Senders List page, click on “New SMS Sender”

You will be presented with a form to choose your SMS service provider.

New Sender

Panda! Help Me!

admin

← Back

Reset

Save

SENDER INFORMATION

Sender Information

General Information

Gateway

E-Goi (Campaign Plan)

New SMS gateway services are added per request. Please open a support ticket if you need one not listed above

Internal Identifier *

SMS TestNumber

Use this field to test your settings after saving. Please use the format: countryCode-number. Eg: 1-555555555

FROM ID *

List ID *

API KEY *

Figure 2 - Senders - New SMS Sender

If your provider is not in the list, please contact us, so we can look into add it.

Form fields vary from provider to provider. Most likely you will find the information requested by the extension in your service provider control panel.

REMOVE SENDER

Please note that you cannot remove a Sender if it exists in a campaign with a status other than “finished”.

SUBSCRIBERS

To see all your existing subscribers, go to "Email Marketing/Subscribers."

Subscribers

Import Subscribers Extra Fields [New Subscriber](#)

Filters Default View Columns Export

Actions 5 records found 20 per page 1 of 1

ID	First Name	Last Name	Email	Cellphone	Add Date	Gender	Status	Store View	Action
3	bento	vilas boas	bento@example.pt	351-2546787	Feb 22, 2017		Active	Main Website Main Website Store Default Store View	Select
4			info@example.pt		Feb 23, 2017		Active	Main Website Main Website Store Default Store View	Select
6			c@example.pt		Feb 23, 2017		Active	Main Website Main Website Store Default Store View	Select
7			b@example.com		Feb 23, 2017		Active	Main Website Main Website Store Default Store View	Select
8			a@example.pt		Feb 23, 2017		Active	Main Website Main Website Store Default Store View	Select

Figure 3 - Subscribers – Listing

- **ID** – Internal Subscriber ID
- **Customer** – If the Subscriber is also a customer. If yes, you can click on the "Yes" to go to the customer page
- **Name** – Subscriber's Name
- **Email** – Subscriber's Email
- **Cellphone** – Subscriber cellphone.
- **Status** – Current Subscriber status. There are two possible statuses. Active and Unsubscribed. The reason why we keep unsubscribed records is in case the same user ever subscribes again. The previous data is not lost. You can permanently remove the subscriber.
- **Emails Sent** – The number of emails sent to that specific subscriber
- **Emails Views** – The number of email views from the subscriber
- **Bounces** – The number of messages that could not be delivered to the subscriber. If this number is high, the email account may not be in use anymore. You can unsubscribe the user.
- **Conversions** – The number of purchases the subscriber has made after click on a campaign email link.
- **Acquisition Form** – From which form this subscriber was added
- **Conv. Amount** – The amount spent by this subscriber in orders made after clicking on a campaign email link

IMPORT SUBSCRIBERS

If you previously used another platform to send email, you can import your current subscriber list into the extension.

Navigate to “System/Import” and from the menu list choose ‘Green Flying Panda - Subscribers’

Please remember the file to import must be a CSV file, utf8 encoded.

These are the columns available for import

- **store_id** – The id of the Store View
- **firstname** – Subscriber First name
- **lastname** – Subscriber Last Name
- **email** – Subscriber Email
- **status** – Subscriber Status
- **customer_id** – Subscriber Customer ID
- **code** – Subscriber Code used to identify him
- **cellphone** – Subscriber cellphone
- **created_at** – Subscriber Added Date
- **dob** – Subscriber Date of Birth
- **bounces** – Number of bounces
- **sent** – Number of messages sent
- **views** – Number of campaigns views
- **clicks** – Number of campaign clicks
- **conversions_number** – Number of conversions
- **conversions_amount** – Conversations Global Amount
- **conversions_average** – Average Conversion Amount
- **send_time** – Time to send campaigns to the user
- **previous_customer** – Is a previous customer (might not be subscribed)
- **gender** – Subscriber Gender
- **last_message_sent_at** – When last message was sent
- **last_message_open_at** – when last message was opened
- **last_conversion_at** – Last conversion occurrence date
- **last_message_click_at** – Last date the subscriber clicks a campaign link
- **last_open_campaign_id** – Last campaign opened
- **last_click_campaign_id** – Last campaign a link was clicked
- **last_conversion_campaign_id** – Last Campaign where a conversion occurred
- **unsubscribed_at** – Un-subscription Date

The field separator is used to specify which character separates columns in your file.

DETAILED INFORMATION

You can see detailed information about a specific subscriber by click on the row he is. You will go to the edit page, but you will also see two new tabs on the left side.

- **Conversions** – Detailed information about all conversion this subscriber has
- **Emails Sent** – A list of all emails sent to this subscriber

MASS ACTIONS

When in your subscribers listing, you can perform a mass action on multiple subscribers. These actions are:

- **Unsubscribe** – Will mark current subscriber status as 'unsubscribed.' No emails will be sent to him
- **Subscribe** – Mark status as 'active.'
- **Delete** – Will delete a subscriber and all information related to him, including, conversions details, emails, stats, etc. Please note that this information was collected by the extension and in no way deleting a subscriber will delete any other store data not directly related to this extension.



SUBSCRIBER EXTRA FIELDS

Subscribers extra fields can be filled manually when editing a subscriber or they can be filled by mapping form fields to extra fields.

Extra fields can be of 4 types:

- Text
- Number
- Multiple Options
- Date

ADD EXTRA FIELD

← Back Delete Extra Field Reset Save ▼

EXTRA FIELDS INFORMATION

Extra Fields Information

General Information

Name * Interests

Type Number ▼

Default Value

Active Yes ▼

Figure 4 - Extra Fields - Add

- **Name** – The Extra Field Name. For internal use only. What value the subscriber will see, if any, is the form field name.
- **Type** – Field type. When adding fields to forms, you must select the type of element you want to add.
- **Default Value** – If the field is not mandatory when filling forms, the default value will be saved.
- **Active** – Field Status

When you add a new field, it will be available in the subscribers listing.

→ When you add a new extra field of the “Options” type and then map that field to a form, options loaded in the form will be the ones specified here

VARIABLES

You can use variables in your messages that will be replaced by the actual information.

Variables are not limited to subscriber information. Some variables are only available for autoresponders. Within autoresponders, variables availability depends on the type of autoresponder.

To add a new variable, just click in the editor button “New variable.”

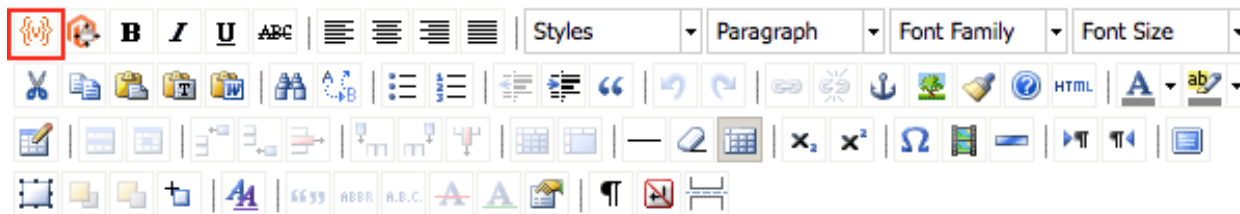


Figure 5 - Editor - Widgets Add

A new window will appear with all available variables:

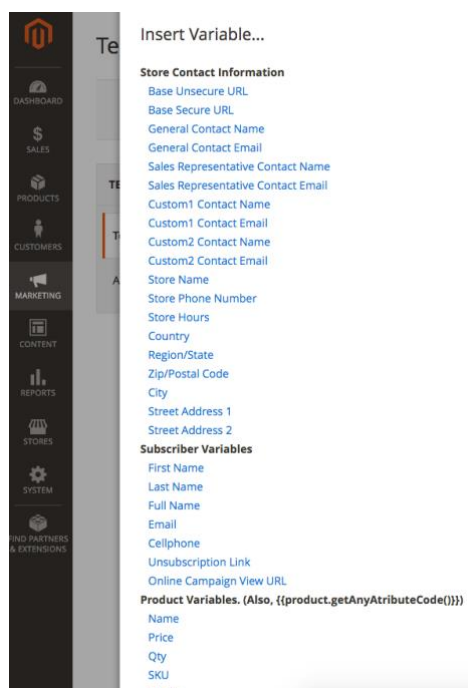


Figure 6 - Variables - Add

To add a new variable to your message, simply click on the variable name. You can scroll down to find more variables.

→ Variables are available for SMS and Email campaigns.

HOW ARE VARIABLES PARSED?

Variables are parsed by Magento™ itself and not by the extension. This adds more power to the variables used. Variables instantiate Magento™ objects and return information by the specified method.

For example:

```
{{var subscriber.getEmail()}}
```

Will load the “subscriber” model and call the “getEmail()” method.

You can replace “getEmail()” for any available method in the subscriber template. This is true to all other variables.

For example, in autoresponders related to order, the “order” model is available with all respective methods.

You can call for example:

```
{{var order.getCustomerEmail()}}
```

```
{{var order.getGrandTotal()}}
```

```
{{var order.getCreatedAt()}}
```

If the autoresponder as a product available, you can call product methods, like:

```
{{var product.getName()}}
```

```
{{var product.getPrice()}}
```

```
{{var product.getDescription()}}
```

```
{{var product.getQty()}}
```

In fact, you can call any product attribute this way. If you have an attribute with the code “custom_specs”, you can call this information like this:

```
{{var product.getCustomSpecs()}}
```

OBJECT AVAILABILITY

Type	Object	Example
Everywhere	Subscriber	<pre>{{var subscriber.getName()}}</pre> <pre>{{var subscriber.getEmail()}}</pre>
	Campaign	<pre>{{var campaign.getInternalName()}}</pre> <pre>{{var campaign.getSubject()}}</pre>
Form – New Entry	From	<pre>{{var form.getTitle()}}</pre>
	Entry	<pre>{{var entry.getField1()}}</pre> <pre>{{var entry.getField2()}}</pre>
Autoresponders type: Review – New Review - Status Changes to Approved Review - On a Bought Product	Review	<pre>{{var review.getTitle()}}</pre> <pre>{{var review.getDetail()}}</pre> <pre>{{var review.getNick()}}</pre>
	Product	<pre>{{var product.getName()}}</pre> <pre>{{var product.getPrice()}}</pre> <pre>{{var product.getDescription()}}</pre> <pre>{{var product.getQty()}}</pre>
Autoresponders type: Shipment - Tracking Added to Shipment / New Ship. W/ Tracking)	Shipment	<pre>{{var shipment.getCreatedAt()}}</pre> <pre>{{var shipment.getPackages()}}</pre> <pre>{{var shipment.getCustomerNote()}}</pre>
	Order	<pre>{{var order.getIncrementId()}}</pre> <pre>{{var order.getCustomerName()}}</pre> <pre>{{var order.getGrandTotal()}}</pre> <pre>{{var order.getCustomerEmail()}}</pre>
	<i>custom</i>	<pre>{{track_title}} {{track_code}} {{order_id}}</pre>
	Shipment	<pre>{{var shipment.getCreatedAt()}}</pre>

Shipment - New Shipment (NO tracking number)		{{var shipment.getPackages()}} {{var shipment.getCustomerNote()}}
	Order	{{var order.getIncrementId()}} {{var order.getCustomerName()}} {{var order.getGrandTotal()}} {{var order.getCustomerEmail()}}
Order - New Order	Order	{{var order.getIncrementId()}} {{var order.getCustomerName()}} {{var order.getGrandTotal()}} {{var order.getCustomerEmail()}}
Order - Bought Specific Product	Order	{{var order.getIncrementId()}} {{var order.getCustomerName()}} {{var order.getGrandTotal()}} {{var order.getCustomerEmail()}}
	Product	{{var product.getName()}} {{var product.getPrice()}} {{var product.getDescription()}} {{var product.getQty()}}
Product - Expected Reorder Time reached (before)	Product	{{var product.getName()}} {{var product.getPrice()}} {{var product.getDescription()}} {{var product.getQty()}}



MESSAGE TEMPLATES

Messages templates are mainly used for Autoresponders, where there is no editor available to add a message. You can also load messages templates while adding Email Campaigns.

Go to "Email Marketing/Marketing Automation/Templates," and you will see a list of your current templates.

Message Templates

Panda! Help Me!

admin

Design Templates

New Message Template

Search

Reset Filter

12 records found

20 per page

1 of 1

ID	Name	Design Template	From Campaign	Variations	Status
1	[Campaign] Test Campaign			www www aaaa	Inactive
2	New Login	Default		ww	Active
3	[Campaign] Test Campaign				Inactive
4	[Campaign] Teste				Inactive
5	[Campaign] Teste		Teste (ID: 5)		Inactive
6	Bento Vilas Boas	Default		Bento Vilas Boas	Inactive
8	[Campaign] Teste		Teste (ID: 70)		Inactive
9	[Campaign] Teste		Teste (ID: 74)		Inactive
10	[Campaign] Teste		Teste (ID: 75)		Inactive
15	121212	Default			Inactive
16	[Campaign] 12				Inactive
18	teste	Default			Inactive

Figure 7 - Templates – Listing

Every time you add a new Email campaign, the content is added a new template, if it does not exist already. This is needed for you to create variations. If you create a variation for a campaign template and then edit the campaign, the variation won't be updated but the "main" template will.

To add a new, click "Add Template."

New Message Template

← Back

Reset

Save and Send Test Emails

Save

▼

TEMPLATE INFORMATION

Template Information

General Information

Internal Name *

Send test Emails to

Only used when testing this template. Separate multiple emails with a comma

Sender *

Panda / info@greenflyingpanda.cc

▼

Only used when testing this template

Parse Template File

Example: My_Company::campaign/content.phtml . You can access the "\$campaign" and "\$subscriber" vars. To get Campaign Content, use the "\$campaign->getMessage()" method

Design Template *

Default

▼

Can be changed when adding campaigns

Status

Inactive

▼

Show / Hide Editor

Paragraph ▼

B

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☰ ▼

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(x)

POWERED BY TINY

Figure 8 - Templates – New

Now, when you are creating/editing a campaign, autoresponder, A/B campaign or Follow Up, you will have the possibility to load this template into the editor.

TEMPLATE VARIATIONS

WHY?

If you have a store with a wide range of customer's types, you might want to send customized templates to different subscriber's groups.



Those groups can be gender, age, customer group, interest, etc.

You can send a completely different design and content for the same campaign.

To add a new variation, just edit the template you wish to create a variation for and click on the top button “New Variation.”

On that new page, you will see on the left side a new tab called “Template variations,” the picture below.

New Message Template

Pandal Help Me!

admin

← Back

Reset

Save and Send Test Emails

Save

TEMPLATE INFORMATION

Template Information

Template Variation

Content

Segment *

-- Any --
Bought above AVG
Customers from Portugal >3 orders
Example.com domain

Store View *

-- Any --
Main Website
Main Website Store
Default Store View

Gender

Male

Age

18-24
25-34
35-44
45-54
55-64
65+

Figure 9 - Template Variations - Add

When sending the campaign, if the subscriber matches more than one variation the first match will be used.

DESIGN TEMPLATES

Design templates goal is to separate message content from message design. If you remove the design part of the campaign text, you can be more confident on how your message you look like, and you don't have to worry about breaking the design. Design Templates are a placeholder for messages. They usually are composed by a header and footer.

To manage your Design Templates, navigate to "Marketing/Marketing Automation/Templates" and on the top bar click "Design Templates"

The same Design Template can have Store View Variations. When adding a new template, you will see a button to specify a template per store view.

→ You can use Magento template variables in the design template

→ E.g.: {{template config_path="design/email/header_template"}}

PRODUCT RECOMMENDATIONS

Product recommendations are a way to display products to your customers that they might be interested in but might not have the knowledge or intent to look for them, especially if your store has thousands of products.

Products recommendations conditions are built in “Marketing/Marketing Automation/Product Recommendations” and products are displayed using widgets.

HOW DO WE BUILD THESE RECOMMENDATIONS?

We build metadata tables from information collected from the previous orders. Let's consider the product Z. We gather information about all previous orders where the product Z was bought and we check for the most purchased products along with product Z. But we don't collect this information only at a global level. We collect this information for each country, customer gender, customer age and customer region. It's easy to understand that different types of customers have different behaviors.

Adding to the segments we mention; we also build product recommendations for segments with the appropriate option selected when you create them (use in reports).

If you have a segment with customer who made more than 10 orders in the last year, you can combine that segment with the results from the country segment. You now can present recommendations that take in account the number of order and location of the customer. This means a customer, for example Spain, who made more than 10 purchases last year from the same product has a French customer, will potentially see different recommendations.

Not only we built recommendations based on what other customers purchase in the same order, but recommendations based on what customer bought in the next order. An example. A customer buys an Xbox. When we build recommendations for the Xbox product, we are not going to take in consideration products that were in the shopping cart when the Xbox was bought, but we are going to find out the most purchased product after customers ordered an Xbox. With this recommendation you can try and predict market tendencies. Because product recommendations in this type of settings will display products that customers did not think they would need when they first bought the Xbox. We might be talking about another controller, a casa, some cleaning products, etc.

Once again, we build this report not only globally but also per age, gender, country, region, and any customer segment with the appropriate choice.

But we have another built recommendation. It's what's called “second level”. This name comes from the fact the recommendations are not built from the most purchased product in the same order, but from the most ordered product in the order the recommendation result. Sounds complicated, but basically, and considering the Xbox example, we are not recommending based on the product that was most purchased with the console,

but we are going to find out what was the most purchased product with the Xbox and then build a recommendation for that product and not the Xbox. The goal of this “second level” recommendation is to return items that, even though might not be directly connected to the Xbox, is commonly enough bought between the same customer that is to be considered at least of some interest by the customer.

Once again, we build this report not only globally but also per age, gender, country, region, and any customer segment with the appropriate choice.

WIDGET OPTIONS FOR PRODUCT RECOMMENDATIONS EXPLAINED

Display Based on...

- Displayed Product in Page
 - This can be used to place recommendations based on the product that is being visualized in the store.
 - Most likely in the product page, but can be placed anywhere where there is in the code registry the element “current_product” (this information is mainly intended for developers)
- Specific Products
 - Recommendations will be built based on the products you specify the appropriate box. This option is usefully to send product recommendations in campaigns, and you want to target a specific product.
- Purchase History
 - We are going to used previous customer purchases to load products and then build recommendations on them.

Use Customer Segments in Recommendations? – If you want the information to be restrict to segments from which the customer is part of.

Based On – Base recommendations based on one of these options. By default, the global scope will be used.



CAMPAIGNS

Campaigns are a very powerful tool to engage your customers.

To list your campaigns, go to "Email Marketing/Campaigns."

Campaigns

🔍 🔔 👤 admin ▾

New Email Campaign

New SMS Campaign

Search by keyword



Filters

👁 Default View ▾

⚙ Columns ▾

6 records found

20 ▾

per page

<

1

of 1

>

ID ↑	Name	Status	Send At	Last Run	Recurring	Store View	Sent	Total Messages	Errors	U. Views	U. Clicks	Action
36	[A/B] TEST A/B	Finished	Feb 23, 2017 05:13	Feb 23, 2017	No		1/1	1	0	2	0	Select ▾
31	Test Autoresponder Links	Finished	Feb 23, 2017 03:05	Feb 23, 2017	No		1/1	1	0	2	1	Select ▾
6	Test Email	Finished	Feb 22, 2017 00:00	Feb 22, 2017	No		1/1	1	1	0	0	Select ▾
5	Test Email	Finished	Feb 22, 2017 04:08	Feb 22, 2017	No		1/1	1	0	0	0	Select ▾
4	Test Email	Finished	Feb 22, 2017 03:47	Feb 22, 2017	No		1/1	1	0	0	0	Select ▾
3	test sms	Finished	Feb 22, 2017 03:23	Feb 22, 2017	No		1/1	1	0	0	0	Select ▾

Figure 10 - Campaigns - List Empty

Summary explanation about columns.

- **ID** – Internal ID.
- **Campaign Name** – Campaign Internal Name. This is not the message subject. The subscriber won't see this name.
- **Deploy Date/Next Run** – The date when the campaign will be sent, or sent again, for recurring campaigns
- **Status** – Current Campaign Status
 - **Stand By** – The default status. Is waiting for the deploy date to arrive.
 - **Running** – The deployment process has already begun, and the campaign is running/emails are being sent.
 - **Finished** – Campaign sent and won't be sent again, even for recurring.
 - **Queueing** – The extension is building the queue for sending. Since queueing is executed in multiple steps for large amounts of emails, it's possible that some emails are sent while the campaign queue is being built. This is the expected behavior, and no duplicated campaigns emails will be sent.
 - **Paused** – The campaign is in pause mode. No messages will be put in queue nor will be sent. Pause/Resume campaigns is a manual procedure.
- **Last Run** – Last time this campaign was sent. This column is useful for recurring campaigns, where you can keep track of sending.

- **Conversions** – The amount this campaign has generated in sales.
- **N. Conversions** – The number of conversions from this campaign
- **Conversions Avg.** – The conversion average for this campaign
- **Sent** – The number of messages sent/the total number of messages in this campaign
- **U. Views** – Unique campaign views
- **U. Clicks** – Unique campaigns clicks
- **View** – A link to see campaign stats

→ Note about campaigns stats: Values presented in the grid above are cumulative if a campaign is recurring. If a recurring campaign is sent ten times, the values for conversions, views, clicks, etc., are the sum of all the recurring campaigns.

NEW CAMPAIGN

To add a new campaign, click on the "New Email Campaign" button. You will see a form like this:

Figure 11 - Campaigns – New – General

New Campaign

🔍 🔔 👤 admin ▾

← Back

Reset

Save and Send

Save and Continue Edit

Save Campaign

CAMPAIGN INFORMATION

Campaign Information

Sending Options

Content

Recurring Profile

Dynamic Deployment?

No ▾

Use this option if you want to maximize conversions rates. This will send emails at hours that users are most likely to open them. There is a span of up to 24 hours with this option

Recurring Campaign? *

No ▾

Send Date

1/16/16 12:00 AM

Figure 12 - Campaigns - Sending Options

Sending Options tab:

- **Dynamic deployment** – Used to dynamically send email campaigns to each subscriber taking in consideration previous campaigns and openings.
- **Recurring Campaign** – If this campaign should run more than once.
- **Deploy Date** – Date when this campaign should be sent

More on Recurring campaigns

If you change the option "Recurring" to other than "No," new options will appear. Something like this:

Recurring Segments

🔍 🔔 👤 admin ▾

← Back

Delete Campaign

Reset

Follow Up

Preview

Duplicate & Save

📘 This campaign is now closed. You can't modify it. Click on 'Duplicate & Save' to duplicate it and edit.

CAMPAIGN INFORMATION

Campaign Information

Sending Options ✎

Content

Follow Up Queue

Follow Up Sents

Conversions

Links

Messages Archive

Messages Queue

Messages Errors (0)

Recurring Profile

Dynamic Deployment?

No ▾

Use this option if you want to maximize conversions rates. This will send emails at hours that users are most likely to open them. There is a span of up to 24 hours with this option

Recurring Campaign? *

Monthly ▾

Unique Recipient?

No ▾

Use this option if you do not want this campaign to be sent to the same recipient more than once.

In which day?

Last Day of the Month ▾

Run around

00:00 ▾

Please choose the start hour for this profile

First Run *

First time this campaign should run

End Date

How long should this campaign run.

Running times

0

How many times should this campaign run. This campaign has already runned for 0 time(s)

Stop sending when

We reach "End Date" AND "Running Times" ▾

Figure 13 - Campaigns – Recurring

32 / 94

In this example, we choose "Daily," but selecting any other option will give you a similar result.

- **Unique recipient** – Select this option if you don't want this campaign to be sent to the same recipient more than once. Option especially useful when sending to segments.
- **Run Around** – At what time should the campaign run
- **First Run** – The date this campaign should first run
- **End Date** – The last date this campaign should be sent
- **Running Times** – How many times should this campaign run

Content Tab:

New Campaign

← Back Reset Save and Send Save and Continue Edit **Save Campaign**

CAMPAIGN INFORMATION

Campaign Information

Sending Options

Content

Load template

Template Previous Status Load Template

External Content

URL Content

If set, content will be fetched from this URL and the text field below will be ignored. {subscriberid} and {campaignid} tags in the URL will be replaced with real data

Show / Hide Editor

Click here to manage your subscription

Path: p

Figure 14 - Campaigns – Content

If you have a template for this campaign, you can load it from the "Load Template" block. Simply choose the desired template and then click "Load Template."

Now that we have everything filed let's click "Save."

You should see the new campaign success message, along with the campaign itself in the listing.

The "Sent" column is very important because it will tell you how the status of your sending. If you have thousands of subscribers, the system will break them into small lists and send a batch every five minutes.

Also, if the emails sent don't correspond to the number of emails supposed to be sent, you will find in that column a link to manually fix the situation, either by trying again or removing the message.

Now that the campaign is saved click on it to enter edit mode, and to see what new tabs where added.

Coupon 🔍 🔔 👤 admin ▾

← Back Delete Campaign Reset Follow Up Preview Duplicate & Save

i This campaign is now closed. You can't modify it. Click on 'Duplicate & Save' to duplicate and edit it.

CAMPAIGN INFORMATION

Campaign Information

Sending Options

Content

Conversions

Campaign Links

Messages Archive

Messages Queue

Campaign Errors

Campaign Information

Internal Name * Coupon

Sender * Licentia E-Commerce / info@lic ▾

Subject * Reiniciar máquina

Segment * -- Any --
Customer Login

Store View * -- Any --
Main Website
Main Website Store
Default Store View

Track Stats? Use Config ▾
If you want to track stats/conversions in this campaigns

Auto-Login? Use Config ▾
If customers should be logged in automatically after opening a campaign link

Design Template Use From Message Template ▾

Figure 15 - Campaigns Edit

As you can see, a few tabs are added to the left column.

- **Children Campaigns** – This Option is only available if your campaign is recurring and lists all campaigns sent.
- **Follow Up Queue** – Only available if your campaign has followed up's.
- **Follow Up Sent** – Lists all follow up's campaigns sent.
- **Conversions** – This tab lists all conversions made through this campaign
- **Links** – Lists all campaign links and each link conversion
- **Messages Archive** – Lists all messages sent by this campaign
- **Messages Queue** – Lists all messages yet to send to this campaign
- **Messages Errors** – Lists all errors occurred when sending messages. You also have the option in this tab to try and send the message again or delete it.

SMS CAMPAIGNS

Creating an SMS campaign is a very similar process. You can still use all variables in the message content.

REPORTS

This extension provides you with a series of reports that allow you to take key decisions based on that data. When you are in your campaigns list, click on the last column "View" link to open the report for that campaign. All information provided by reports is real time.

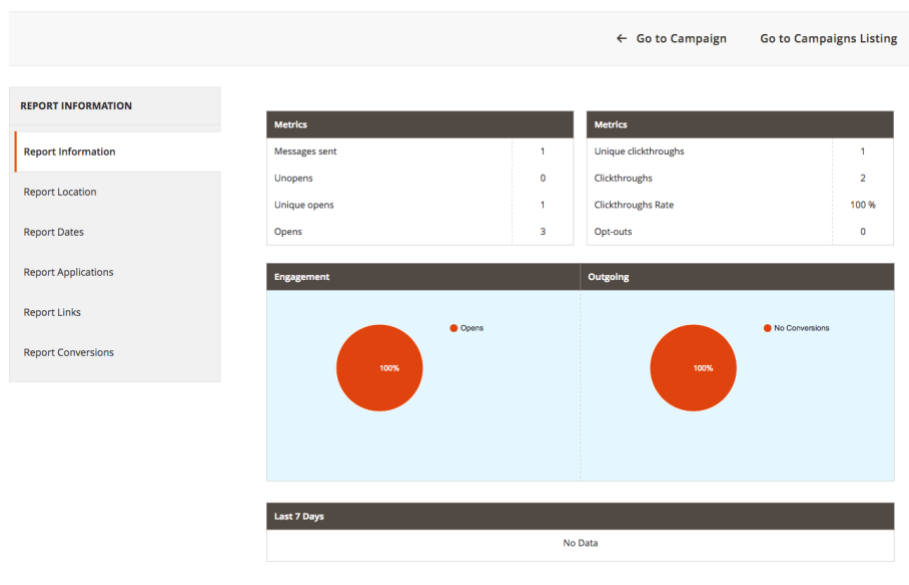


Figure 16 - Campaigns - Reports Summary

In the first page, you will find a summary of your campaign and how did it do. Key information like conversions opens, clicks and opt-outs are present in this panel.

You can also find in the left tabs more information regarding the campaign. Like countries, cities, applications, links, and dates.

FORMS

Forms are a great way, not only to capture new subscribers but also to engage them.

Forms

🔍 🔔 👤 admin ▾

New Form

Filters Default View Columns

1 records found

20 per page 1 of 1

ID	Name	Title	Active	From Date	To Date	Entries	Actions
2	Amazing Event!	Interesting products	Yes	Feb 28, 2017	Mar 28, 2017	5	Select ▾

Figure 17 - Forms - Listing

When you navigate to “Content/Forms” you will be presented with a list of all your forms. You can get a quick overview of how many entries each one has and their status.

ADD FORM

Some relevant notes about form fields when adding a new form

- Success Page
 - The page the user should be redirected to after a successful form submission. Enter the full URL or the relative path. Valid examples:
 - <http://www.mystore.com> => Will redirect to <http://www.mystore.com>
 - </forms/thanks> => Will be redirected to http://MY_STORE_BASE_URL/forms/thanks
 - If not, value is supplied the user will be redirected back to the for page
- Logged in Customers Only?
 - If only customers, who are currently logged in, can submit new entries. There is an option to let customers, logged in or not, to view the form, but can't submit entries.
- Can Customers Edit their entry?
 - If logged in customers can edit previously sent an entry. Id this is enabled, only one submission per customer will be allowed since he will automatically edit the one, he previously submitted.
- Update Button Label
 - If you allow customers to edit their entry, the text to display in the “submit” form button

→ The form will only be active if all the tree conditions (status, from date, to date) are true.

ADDING FORM ELEMENTS

After saving the form, you will see a new top button to add form Elements

To add a new element, simply click on the button and chose an element from the list.

- **Checkbox (One)**
 - A single checkbox to check. Mostly used for “I Agree with terms and conditions.” To make sure the customer checks this single checkbox, mark it as “required.”
- **Checkboxes (Multiple)**
 - A list of checkboxes for the user to choose from. If marked as “required,” it will pass validation if one or more checkboxes as checked. The user can check one or more.
- **Country List**
 - A helper to add a select menu to the country list pre-filled. This country list is loaded from Magento
- **Date**
 - A date picker for the user to choose from
- **File**
 - Adds a file uploader element to the form
- **Email**
 - User’s email. If the “map” option is set to yes, this email will be added a new subscriber
- **Hidden Field**
 - A hidden field that the user can’t see. This is useful to track origins. Use the “default value” option to add value to this field. You might also want to add params to the “params” field to track values. (more info about this below)
- **HTML Text**
 - HTML text to display to users. No information related to this field will be saved
- **Long Text**
 - A text area. Usually for comments, or other types of fields that might require long entries
- **Number**
 - An input field that only accepts numbers. You can define the minimum and maximum number for the field.
- **Phone Number**
 - An input that accepts phone numbers. Can be mapped to the subscriber field.
- **Radios (Multiple)**
 - A list of radio buttons. User can only choose one option
- **Rating**
 - Displays a star-rating system
- **Select List**
 - A drop-down menu
- **Text**
 - A regular text’s field. Mostly used for short text inputs, like name, city, etc.

- URL
 - A field that expects a URL to be supplied.

→ While CAPTCHA can't be manually added, the option is present in the system configuration. "Stores/Configuration/Customer/CAPTCHA." Form Element CAPTCHA will respect those options.

FORM ELEMENT OPTIONS

- Name
 - The field's name. This value will be showed to users
- Sort Order
 - The field position when building the form
- HTML
 - HTML text to be displayed
- Options
 - Used for elements that accept multiple options. One option per line.
- Placeholder
 - This text will be shown inside the form to help users understand what value should be inserted there. As soon as the cursor hits the field, this text disappears.
- Params
 - Accepts a list, separated by a comma, of params to be checked against the current URL. This is used in the hidden form field to grab values from the URL. Imagine you want to track the submission origin. A user clicks on this link: <http://www.mystore.com/invitation?site=bears>. If in the params list is a "site" value, the value "bears" will be passed to the form and stored in the hidden field you are editing.
- Min Number
 - Lowest number accepted in the field
- Max Number
 - Highest number accepted in the field
- Max File Size
 - Maximum upload file size
- Allowed Extensions
 - Extensions allowed for file upload
- Hint
 - A more extension description that complements the 'placeholder' text. This text will be displayed below the form element itself.
- Active
 - Form Element status. If set to "No" won't be displayed to users.
- Unique

- If the value in the field should be unique to all submissions. This “unique” restriction is per form and not globally. The same unique value can be submitted in different forms.
- **Validate Entry**
 - If set to yes, the entry will be validated through a link sent to the specified email by the customer when filling the form
- **Map**
 - Map form element value to a subscriber. If the field is an email and the subscribers do not exist, a new one will be created.
- **Map to Customer**
 - Maps the input value to a customer attribute
- **Required**
 - If filling the field is required.
- **Default**
 - Default value the field should display. Users can change this value.
- **CSS Class**
 - A CSS class to be added to the input tag
- **Disabled**
 - If this field should be disabled. The user won't be able to change any default value in the field.
- **Checked**
 - If the checkbox should be checked by default
- **Protected**
 - If the file or image uploaded should be moved to a custom path, potentially outside public access. This option prevents direct access to the file from a URL.
- **Encrypted**
 - If the file or image uploaded should be encrypted. If set to yes, files can only be open in the Magento™ admin interface
- **Pattern**
 - A REGEX validation pattern to validate field value. Please make sure the REGEX you enter in this field.
- **Multiple**
 - The number of files/images allowed to upload in a sing element

INSERT IN STORE PAGE

To insert a new form in a page, while in the editor, click on “New Widget” (in the editor or self-contained button). Choose the form from the list. That's it.

ABOUT VALIDATING ENTRIES

If you add an email element to the form, you will have the possibility to force the customer who submitted the entry to validate it in the email he provided. You can specify a validation in days for the link.

You can edit the Email Template in the Magento™ Email Editor (Stores/Email Templates).

NEW ENTRY NOTIFICATIONS

Navigate to “Marketing/Marketing Automation/Configuration” and then on the left side choose “Forms.”

Forms ⌵

Email Entry Validation Template <small>[store view]</small>	Validate Form Entry (Default) <small>Email template chosen based on theme fallback when "Default" option is selected.</small>	<input checked="" type="checkbox"/> Use system value
New Entries Notification <small>[global]</small>	<input type="text"/> <small>Notify the following addresses of new form entries</small>	
Email Notification Template <small>[store view]</small>	New Form Entry (Default) <small>Email template chosen based on theme fallback when "Default" option is selected.</small>	<input checked="" type="checkbox"/> Use system value

Figure 18 - Forms Configuration

Here you can choose the templates sent for email validation and new entries notification.

You can edit these templates in “Marketing/Communications/Email Templates.”

CUSTOMER SEGMENTS

Create a segment using an array of options, such as: subscribers account data, customer attributes (name, email, store, gender, date of birth, etc.), customer activity (orders, reviews, tags, account age, abandoned cart, etc.), previous orders (payment method, shipping address, order amount, order date) and previous order products (SKU).

To increase build speeds, this extension creates metadata tables to build activity data. When you install the extension, the process of build this metadata starts and can take a few hours depending on how many customers, subscribers, and quotes do you have.

NEW SEGMENT

If you don't have any yet, click on "Add Segment."

New Segment

Search

Pandal Help Me!

admin

Back

Reset

Save and Continue Edit

Save

SEGMENT INFORMATION

Settings

General

Segment Name *

Is Active *

No

Manually Managed

No

If set to yes, only customers manually assigned will be part of this segment. Cannot be changed after.

Use Product Catalog

No

If set to yes, You will be allowed to use this segment as a product catalog

Segment Type

Registered Customers

Please save this information in order to specify the conditions for segmentation. Cannot be changed after.

Website Scope *

Main Website

Description

Build Reports for This Segment?

No

Auto Update Options

No Update

Live Update Options

New Order

Order Changes to Complete

New Invoice

New Account

New Account Confirmed

When any of the selected events above is triggered, the segment for the customer will be built during the request

Segment Pricing? *

No

Enable Product Pricing for Segment?

Restrict Access? *

No

Will be used to Restrict Access to Pages/Products/Categories?

Figure 19 - Segments - Add

- **Manually managed** – Manually managed segments don't have conditions. If you want a customer in the segment, you must manually add it. The same for if you want the customer removed from the segment. You must remove him manually.
- **Use Product Catalog** – Enable this option if you want to add specific products (SKU's) to this segment and restrict access to the specific products to customers in the segment.
- **Segment Type** – If you want to segment all subscribers or subscribers that are also customers. The latter option gives you more options in the segmentation, namely customer attributes.
- **Build Reports for this Segment** – Enabling this option will build advanced sales reports based on customers in the segment.
- **Auto Update List** – If you have thousands of customers subscribed to your newsletter, segment building can consume some resources when building the subscribers list for that segment. For that reason, you should run it as a background process, or by building using Magento Cron system, daily, weekly, or monthly. If you choose the "Real Time" option, after you save it, the segment will be rebuilt in the background and after that will be updated in real time.
- **Live Update Options** – There is a difference between "Real Time Update" and "Live Update". Real time update will update the segment in every action possible of changing a condition. "Live Update" will only update the segment in the specified events. For e.g., if you want a segment containing all customers who order more than \$1.000,00, you can create a condition and only update the segment when an invoice is created. This will avoid unnecessary segment updates in actions like, new account, search, etc.
- **Segment Pricing?** – If you want to define different customer prices for customers in this segment. Products prices can be managed per product (when editing), using the "Import" section from Magento or by API.
- **Restrict Access** – If you want to use this segment to restrict access to categories/products/pages/blocks to customers in this segment. Segment Access is managed in "Customers/Customer Segments/Segments Access".

In the "Conditions" separator, you will have a promo rule like conditions builder.

Please remember that when you save a segment, its records aren't automatically refreshed. You must wait for the next cron or force the reload using the "Refresh Records" button on top of the edit page. You will get an admin notification when segment update has finished.

You can choose as many conditions as you want. Here is a list of some segment conditions that may be useful

- Leaving Buyers
 - Don't buy for more than four months, but bought something over the last eight months
 - Made previous orders
 - Orders amount was above average
- Buyers to regain
 - Haven't purchased for over a year
 - Made more than five purchases
 - Made orders above average
- Premium Buyers
 - Made several purchases over the last two+ years
 - Their sales order amount is above average
 - Percentage of completed orders is over 95%
 - Lifetime sales amount is over [reasonable value]

SEGMENT CATALOGS

This extension allows you to have product catalogs per segment. When you assign a product to one, or more, segment catalog, those products are only visible to customers in those segment(s). If a product is not assigned to any segment catalog, it will be visible to all customers.

- Let's imagine you have a catalog with 10 products. You have one segment with catalog enabled and you add 3 SKU's to that catalog, and, at this point, this segment has no customers in it. When a customer visits your store, he will only see 7 products, and not 10, because if a segment has products in it, a customer must be in that segment to view the products. When a customer is part of that segment, he will now see 10 products (7 that are not assigned to any segment catalog and the 3 that are assigned to the segment he is in)
- Let's imagine you have a catalog with 10 products, with SKU's ranging from 1-10, and you also have 2 segments with product catalogs. The first segment catalog has 3 products (1-3) and the second has 4 products (2-5). The products with SKU's 6-10 are not assigned to any segment catalog. When a customer, that does not belong to any segment visits the store, he will only see products with SKU's 6-10. If that customer is the first segment, he will see products from 1-3 and 6-10. If the customer is in the second segment, he will see products from 2-5 and 6-10. If the customer is in both segments, he will see all products

Page cache must be cleared for price changes to take effect. If a customer is already logged in, he will only see the changes when he logs-out out and logs back in.

To enable segment catalogs, navigate to “Stores/Configuration/Green Flying Panda/Customer Segments” and enable them. Segment catalogs must also be enabled per segment.

When editing or adding a new customer segment, please mark the option to use the segment as catalog.

Adding/Removing products from segments is done through the native Magento™ import system. Navigate to “System/Import” and then choose the option “Green Flying Panda - Segment Products”.

Entity Type * Green Flying Panda - Subscribers [Download Sample File](#)

Import Behavior * -- Please Select --

Validation Strategy * Green Flying Panda - Segment Products

Allowed Errors Count * 10

Please specify number of errors to halt import process

Field separator * ,

Figure 20 - Import Segment Catalogs

Removing products is also available when editing a segment and checking the product in the “Products Assigned” Tab.

To build the necessary CSV file, it must contain two columns: sku, segment

- sku – The product SKU
- segment – The Customer Segment code (not ID or Name). This value is specific in the “code” field when creating/editing a segment

→ Importing Segment Products is also available as an API operation

SEGMENTS ACCESS

You can restrict access to a page, category, block, or product to a customer segment. To add such restriction, navigate to “Customers/Customers Segments” and then, on the top of the grid click “Segments Access”.

Segments Access

[Panda! Help Me!](#) [admin](#)

Select Entity to restrict access to

Filters Default View Columns

1 records found

20 per page 1 of 1

ID	Entity Type	Name	Active	Start Date	End Date	Action
1	CMS Page	Green Flying Panda	Yes	Apr 01, 2019	Apr 29, 2021	Select

Figure 21 - Customer Segments Access

To add a new access restriction, click on the down arrow of the button “Select Entity to restrict access to”. Choose one of the options.

New Segment Access

ACCESS INFORMATION

Access Information

General Information

Internal Name *

Segment *

-- Any --

Bought above AVG

Bought above AVG

Example.com domain

Category *

|---Default Category

Is Active *

No

Active From Date *

Active To Date *

← Back

Reset

Save

Figure 22 - Customer Segments - Access Restriction to Category

In the example above, we see the “Category” restriction form.

Please note that when you choose a category, all products in that category won’t be accessible to customers, unless they are part of the selected segment(s). This happens even if the product is in multiple categories. E.g., if you have a product in cat A and in cat B, and you restrict access to cat A, the product won’t be listed in cat B.

COUPONS

This extension allows you to directly integrate your coupon generation by sending to each recipient a new coupon generated automatically. Coupons integration works on campaigns, follow up's and autoresponders.

Before using this tool, you must have a "Shopping Cart Promo Rule."

When in your editor, click on the "Insert widget" button and then choose "Email Marketing – Coupon Code List." A window like this will appear

The screenshot shows a configuration window for adding a coupon. It contains the following fields and options:

- Widget Type ***: A dropdown menu with "Panda Sales Automation - Coupons List" selected.
- Promo Rule for coupon ***: A dropdown menu with "\$4 Luma water bottle (save 70%)" selected. Below it is the text: "Please select the Promo Rule you want your coupon code from".
- Coupon Validity ***: A text input field. Below it is the text: "During how many hours, after being generated, the coupon can be used. 0 to forever".
- Code Length ***: A text input field with "8" entered. Below it is the text: "Excluding prefix, suffix and separators".
- Code Format ***: A dropdown menu with "Alphanumeric" selected.
- Force Email Match ***: A dropdown menu with "Yes" selected. Below it is the text: "Selecting Yes will require a match between the coupon user received and their email for the coupon to work".
- Hide if expired ***: A dropdown menu with "Yes" selected. Below it is the text: "Hides the coupon if it already expired".
- Code Prefix ***: A text input field with "8" entered.
- Code Suffix ***: A text input field with "8" entered.
- Dash Every X Characters ***: A text input field with "8" entered. Below it is the text: "If empty no separation".
- Template ***: A text input field with "widgets/coupon.phtml" entered. Below it is the text: "Developer hint: \$this->getRule();".
- Display Countdown? ***: A dropdown menu with "No" selected. Below it is the text: "Will not work in email, only online store".

Figure 23 - Coupons – Add

In the first field, please select the promo rule to be used by the widget. Filling the remaining fields should be easy, as they are the same option as the default in Magento.

Only the last field is new. The "Force Email Match" option will only allow coupon usage if the email order is the same as the recipient of the message. E.g., If you send a campaign to info@licentia.pt with a coupon code, only a customer with this email will be able to use that coupon code.

New codes are generated for each campaign so that you can use the same promo rule for multiple campaigns. Coupons can only be used once.

Choosing the option “Display Countdown” will show a countdown to the to the end of the coupon validity, specified in the same widget screen.

SPECIFIC COUPON FOR CUSTOMER

This extension also adds a new “Customer ID” field when you create an “Cart Price Rule”. The goal of this field is to make sure that specific coupon is not used by anyone else but the intended customer.



WIDGET

This extension also provides a widget that can be used to display products to users, subscribed to Newsletter or not, that is based on each customer activity.

PRODUCT RECOMMENDATIONS

In the widget if you select the option “Product Recommendations”, you will be able to insert the recommendation you created in “Marketing/Product Recommendations”

WIDGET TEMPLATES

The extension comes with a default template for this widget, based on the “New Products” widget from Magento®.

You can add your templates and specify the path in the template field when adding the widget.

This extension uses Magento log to select the appropriate products for each customer for the options: Product Attributes and Product Views. If you have large tables with millions of records, page loading may be affected.

AUTORESPONDERS

To list your autoresponders, go to "Email Marketing/Autoresponders."

Autoresponders

🔍 🔔 👤 admin ▾

Add New Autoresponder

Search by keyword 🔍

Filters Default View Columns

1 records found

20 per page 1 of 1

ID	Name	Event	Active ↓	From Date	To Date	U. Views	U. Clicks	Queue	Campaigns
1	Novy segment	Customer - Login	Yes	Jan 13, 2016 00:00	Jan 27, 2016 00:00	0	0	Queue (1)	Campaigns (0)

Figure 24 - Autoresponders – List

- **ID** – The internal ID
- **Event** – The event that will trigger the email
- **Name** – Autoresponder name
- **Sends** – The number of times this event was triggered
- **Conversions** – The number of conversions
- **Conv. Amount** – The amount of the conversions
- **Is Active?** – If the autoresponder is active or not
- **To Date** – The initial date
- **To Date** – The end date
- **U. Views** – Unique Views
- **U. Clicks** – Unique Clicks
- **Campaigns** – View Autoresponder Campaigns
- **Queue** – View Campaigns in queue

You can click in the Queue column to see pending messages to be sent. Also, you will be able to cancel pending messages.

Clicking on the "Campaign" column will redirect you to the campaign created to send the autoresponder message.

WHEN ARE AUTORESPONDERS PROCESSED?

Event	Execution
Campaign - Open	Immediately
Campaign - Clicked Any Campaign Link	Immediately
Campaign - Clicked Specific Campaign Link	Immediately
Search - New	Immediately
Review - New	Immediately
Review - Status Changes to Approved	When a review status changes to "Approved." It might be when a new review is added if you don't moderate them
Review - On a Bought Product	Immediately
Product - Expected Lifespan Reached	When invoice is created
Sales - New Abandoned Cart	Every 15 mins, checks for new abandoned carts
Customer - Signup	Immediately
Customer - Login	Immediately
Customer - Last Activity	Every 15mins, checks for no activity. Activity is loaded from the Magento™ reports table. Only works for customers
Customer - Birthday	Daily, around 1:30 am
Shipment - Tracking Added to Shipment / New Ship. W/ Tracking)	Immediately
Shipment - New Shipment (NO tracking number)	Immediately
Magento™ Internal Event	Immediately
Form - New Entry Added	Immediately
UTM Campaign	Immediately
Order - New Order	Immediately
Order - Bought Specific Product	When the invoice is created

Order – Status changes to [any Magento™ available status]	Immediately
--	-------------

→ “Immediately” means we create a new cron for the event. It might take up to 7mins for the first chain event to be processed.

NEW AUTORESPONDER

To add a new autoresponder, click "New Autoresponder." You will see a new page with a select menu with the following options:

- Campaign - Open
- Campaign - Clicked Any Campaign Link
- Campaign - Clicked Specific Campaign Link
- Search - New
- Review - New
- Review - Status Changes to Approved
- Review - On a Bought Product
- Product - Expected Lifespan reached (before)
- Sales - New Abandoned Cart Appears
- Customer - Signup
- Customer - Login
- Customer - Last Activity
- Customer - Birthday
- Shipment - Tracking Added to Shipment / New Ship. W/ Tracking)
- Shipment - New Shipment (NO tracking number)
- Magento™ Internal Event
- Form – New Entry Added
- UTM Campaign
- Order - New Order
- Order – Status Changes To [*]
- Order - Bought Specific Product

CAMPAIGN – OPEN

This autoresponder is fired when a subscriber opens a campaign.

Please note that if the user blocks remote images, the open won't be accounted for and the autoresponder won't be triggered. The autoresponder won't be triggered if you choose not to track campaign stats

CAMPAIGN - CLICKED ANY CAMPAIGN LINK

This autoresponder is fired when a subscriber opens a link from the email.

Please note that the autoresponder won't be triggered if you choose not to track campaign stats

CAMPAIGN - CLICKED SPECIFIC CAMPAIGN LINK

If your campaign has a wide variety of products, with this autoresponder, you can specify the link that should trigger the autoresponder.

You might have sent a newsletter with cameras and smartphones, but you might want to send a follow up for cameras

Please note that the autoresponder won't be triggered if you choose not to track campaign stats

SEARCH - NEW

Imagine a customer searches for Xbox one. You might want to send him a campaign after a day or two if he did not make any order.

When creating the autoresponder, select the "New order" event in the **Cancellation Events**. This way the autoresponder message won't be sent if the user searched for Xbox and then made a purchase.

REVIEW - NEW

The autoresponder is fired when a new review is created. No matter the approval state.

If you required review approval, you could use this autoresponder to send the subscriber a note pointing that out and give him extra information, like how long it might take to approve the review.

REVIEW - STATUS CHANGES TO APPROVED

This autoresponder is fired when the review status changes to approved.

You might want to use it to notify the subscriber the review was approved.

Please note that if you don't require reviews approval, this autoresponder will be fired when a new review is done since the status will be 'approved.'

PRODUCT - EXPECTED LIFESPAN REACHED (BEFORE)

It's used for products that have a predictable lifespan, and the customer is expected to make another order.



If you sell shaving cream, you can expect at some point a new order for that product again. It varies from customer to customer, but we can give the extension a default value. Let's imagine the product lasts for six weeks.

How do we know how long the product will last?

If it's the customer first order, we just can't know based on customer information. But if he made more than two orders, we already know the number of days he takes to make another order, and we calculate the number of days from there.

But for the cases where we don't know the number of days, each product can have an attribute that holds that information. Add a new product attribute called "Number of Days," or anything else. In that product field, add the number of days for the product lifespan. Then go to "Marketing/Email & SMS Marketing/Configuration" and in the "Expected Reorder Time Attribute" option, choose the attribute that holds the number of days.

Continuing with the example, six weeks * 7 days = 42 days.

If the customer makes an order now, it's expected that within 42 days he will need to buy another one.

Let's create the autoresponder.

We choose the product cycle option, and in the "Number of Days" field, we define the number of days before the event to trigger the autoresponder. If the day the customer is expected to make another purchase is in 42 days, we want to send him the first notification ten days before (we insert 10 in the field). Ten days before, we will start executing the chained actions from the autoresponder.

Note: We only use data from orders with status "complete."

SALES - NEW ABANDONED CART APPEARS

This is used to send abandoned cart email reminders.

You can define the amount of time, in minutes, a shopping cart should be flagged as 'abandoned' since it was last updated by the customer.

In this type of autoresponder, you should take advantage of the "Email & SMS Marketing – product List" widget to send the subscriber the contents of its cart.

Additionally, you can also use our other widget "Email & SMS Marketing – Coupons List" to send to the subscriber a specific coupon that can only be used by him and has an expiration date.

CUSTOMER - LAST ACTIVITY

This autoresponder is triggered when is not registered any activity from that user in the store.



Please note that this event is based on information collected by Magento™ for registered customers only. If you clear your visitor's logs, this information will also be lost.

CUSTOMER - BIRTHDAY

This autoresponder is fired X days before the customer birthday. The number of days is specified when the autoresponder is created.

Please note that if you add a "wait" action in your autoresponder, the waiting period starts after the autoresponder is triggered (X days before the customer birthday) and not after the birthday.

For example: If a customer's birthday is 20 days from now and you want to send the first notification 15 days before, you should place in the "Number of Days" field 15, because is the day you want the first event to be fired. If you want to send the second message five days after the first email, add a new "Wait" action and specify five days. Meaning, five days after the first event, send another message.

The extension will not fire more than one time per subscriber per year. Meaning this, if the subscriber has a birthday on April 2, and then changes the date to September 12, the extension will not send the campaign again on September 12, if an autoresponder of the same type was sent in April.

SHIPMENT - TRACKING ADDED TO SHIPMENT / NEW SHIP. W/ TRACKING)

This autoresponder is fired when a new shipment is created with tracking information or when new tracking information is added to the shipment.

To clarify, if you create a shipment with no tracking code, the autoresponder won't be fired up, but if you later add the track information, the autoresponder will be fired.

This is useful to send the customer a message with tracking information, whether is SMS or email.

Just as a reminder, you can use these tags in your message (email or SMS) and they will be converted to tracking information {{track_title}} {{track_code}} {{order_id}}

SHIPMENT - NEW SHIPMENT (NO TRACKING NUMBER)

This autoresponder is only fired if there is no tracking information attached to it.

MAGENTO INTERNAL EVENT

This autoresponder is triggered by Magento™ internal events. Example of Magento™ internal codes include customer_login, sales_order_place_after, customer_save, etc.

Your dev team should help you out with this one for identification of the event you need

UTM CAMPAIGN

This autoresponder is fired when specific params are detected in the URL originating in marketing campaigns.

Available params are:

- Campaign (utm_campaign)
- Source (utm_source)
- Medium (utm_medium)
- Term (utm_term)
- Content (utm_content)

Available conditions for each parameter:

- Is
- Starts With
- Ends With
- Contains
- Does Not Contain
- Wildcard
- Exists


You might want to add autoresponders for events like, a payment is marked as fraud. The order was put on hold/released from hold status, etc.

EXAMPLE

In this example, will pick the "Search - New" option, but the usage principle is the same for everyone.

New Autoresponder

   admin ▾[← Back](#)[Reset](#)[Save and Continue Edit](#)[Save Autoresponder](#)

 Please save the Autoresponder to assign actions and change other information

AUTORESPONDER INFORMATION

Triggers

Settings

Event Trigger * Search - New ▾

Send Only Once? Yes ▾

To the same subscriber

Search Value *

Separate multiple values by comma ,

Query String
Match Equal ▾

Figure 25 - Autoresponders – New

ACTIONS

This extension supports multi-level action.

It also supports conditional action, giving you great control over the actions to be taken over a variety of subjects.

To add a new action, go to the “Actions” left tab.

On the left, you will see a list of possible actions to perform once the autoresponder is triggered.

To add an action, simply drag and drop the action to the right. The first action should be dropped in the “Triggers Fired” box.

Subsequent actions can be dropped on top of each other.

Different actions have different options.

→ you want to send the autoresponder immediately don't add any “Wait” action. It might take up to 10 mins for the autoresponder to be processed (created, messages queued, message sent)

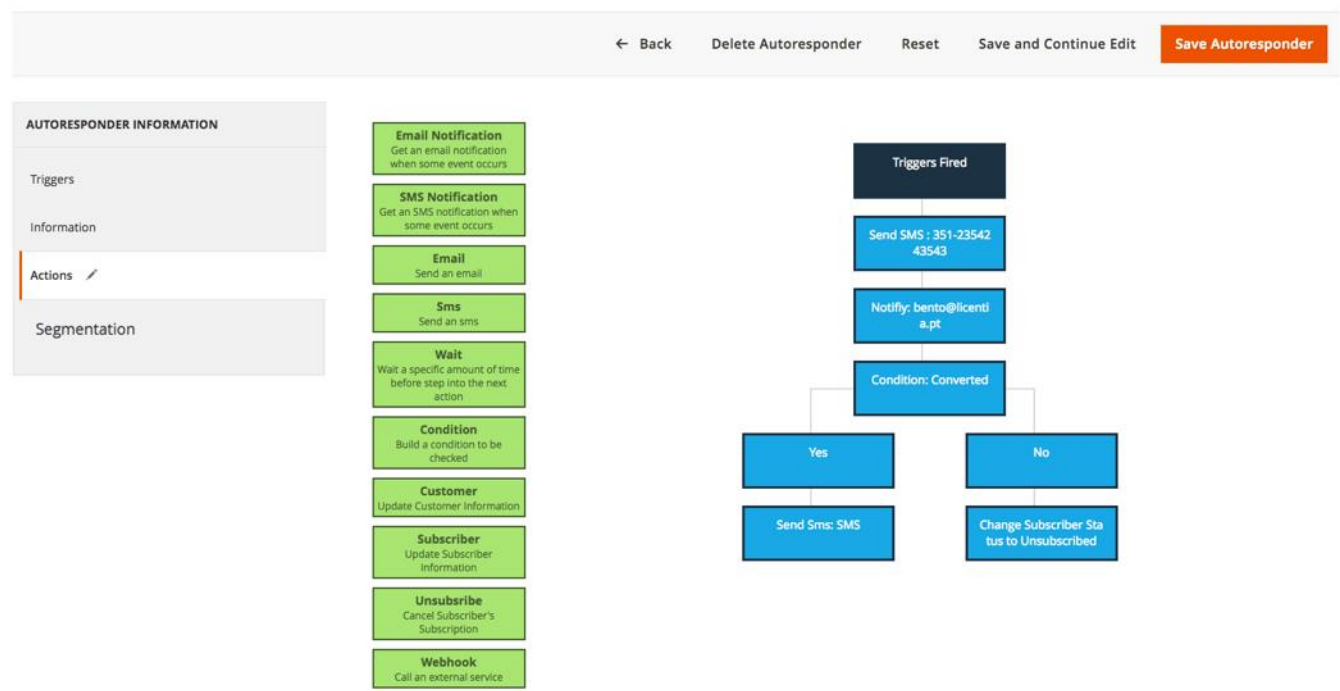


Figure 26 - Autoresponders - Actions Tab

If you want to edit or remove an action, scroll over with your mouse, and two icons will appear.

FOLLOW UP'S

Follow Up's are attached to campaigns and are sent X days after a campaign was sent. To add a new, Follow Up, we must have an existing campaign. To see existing Follow Ups, go to "Email Marketing/ Follow-Ups."

ADD NEW FOLLOW UP

Edit the campaign you want to add the Follow Up. You will see a button "+ Follow Up."

→ Recurring campaigns cannot have Follow-Ups.

Figure 27 - Follow Up – New

- **Internal Name** – it's the Follow Up name
- **Active** – Follow Up Status
- **Subject** – Message subject. Note that you can use the original campaign subject by using the tag `{{subject}}`. The Follow-Up subject can be something like: Re: `{{subject}}`
- **Send to subscribers that** – This option filters subscriber that should receive the Follow-Up.
- **Send after X days** – How many days after the campaign deployment should the Follow Up be sent.
- **Segment** – Send only to subscribers in this segment
- **Message** – Here to, you can use the `{{message}}` tag to display the original message

A/B CAMPAIGNS

A/B campaigns are a great way to test subscriber's receptivity to a campaign.

You can list your existing A/B campaigns by clicking "Email Marketing/A/B Campaigns."

Add a new A/B Campaign and choose what you want to test:

- Sender
- Subject
- Message
- Sender + Subject + Message
- Sender + Subject
- Sender + Message
- Subject + Message

After choosing an option, a new page will load with all the options. For this example, we will choose "Sender + Subject."

Figure 28 - A/B Campaigns – Add

- **Internal Name** – Name to be used internally.
- **Active** – Campaign status
- **Test Deploy Date** – This is the date when the test campaign will be sent
- **Send General Campaign after X days** – How any days after the test campaign should the remaining emails be sent
- **Percentage Emails Send Test** – What is the percentage of emails that should be sent to the test campaign
- **How to determine the winner** – How will the system know what version the winner is
- **Segment** – Send only to subscribers from this segment

NEW A/B CAMPAIGN

New A/B Campaign

🔍 🔔 👤 admin ▾

← Back

Reset

Save and Continue Edit

Save A/B Campaign

A/B CAMPAIGN INFORMATION

General ✎

Email

Testing Options

Content

Subject B *

Sender B *

Licentia E-Commerce / info@lic ▾

Figure 29 - A/B Campaigns - Sending Test Options

Because when we created this campaign, we said we want to test Sender and Subject, this tab has, what's called, the version B for this campaign. When sending the campaign, the message will be the same in version A and B, sender and subjects will be different.

A/B LISTING



Figure 30 - A/B Campaigns – List

As stated in the picture above, we have three important columns that include results from both versions A and B. Views, Clicks and Conversions. These values are real-time values. The last column will have a link to the resulting campaign. If you choose to determine the winner manually, you can edit the campaign, and you will see two buttons:

- Sender Version A
- Sender Version B

GOALS

Goals were developed so store managers could in a very easy and fast way monitor top indicators, like number of subscribers, conversion, etc.

Go to "Email Marketing/Goals," and you will see a list of current Goals and their status.

ADDING GOALS

Click "New Goal" and in the next page define what type of goal do you want to track:

- Conversions - Global
- Conversions - Segment
- Conversions - Campaign
- Views - Global
- Views - Segment
- Views - Campaign
- Clicks - Global
- Clicks - Segment
- Clicks - Campaign
- Subscribers - Global
- Subscribers – Segment
- Subscribers – Form
- Entries - Form

If you choose an option that is not "Global," you will be able to define which Segment/Campaign do you refer.

In this example, we choose "Conversions - Global."

Figure 31 - Goals - Add

- **Variation** – The variation about the existing value. Valid values: 19 - Expects final number; +19 - Expects Final Number to be increased by 19; +20% - Expects Final Number to be increased by 20%; -9 - Expects Final Number to be decreased by 9; -20% - Expects Final Number to be decreased by 20%
- **Name** – Goal's Name
- **Description** – Goal's Description
- **Start Date**
- **End Date**

After saving the goal we are redirected back to Goal's listing, and we can see the record we just added.

Goals

🔍 🔔 👤 admin ▾

Refresh Data

Add New Goal

Search by keyword



Filters

Default View ▾

Columns ▾

2 records found

20 ▾

per page

<

1

of 1

>

ID ↓	Goal Type	Name	Variation	Original Value	Current Value	Expected Value	Start Date	End Date	Result	Action
2	Views - Global	esposende	+50	0	1	50	Dec 2, 2015 12:00:00 AM	Dec 31, 2015 12:00:00 AM	Running	Select ▾
3	Subscribers - Global	Novy segment	100	2	2	100	Dec 30, 2015 12:00:00 AM	Dec 31, 2015 12:00:00 AM	Stand By	Select ▾

Figure 32 - Goals – Listing

Analyzing the above record, we are expected to reach an amount of 100€ in conversions by the end of the month.

- **Original Value** – The value before we define the goal. This value will be subtracted from the current value to determine status.
- **Current Value** – The current value of our goal. This value is updated on a daily basis, but you can update it by clicking "Refresh Current Values." When the result column is "Running," the current value progress background will change color based on progress.
 - Red => Low completion
 - Orange => Medium
 - Green => High

When the "Result" column is "Failed" the cell background will be black. If the Result is "Accomplished" the background color will be dark green.

- **Expected Value** – The value to achieve.
- **Result** – The Goal Status

INFO WINDOWS

Info Windows purpose is to give customers relevant information or show common and expected tasks in an easy and non-disturbing way.

Maybe is a new product or a promotion in a specific category. Maybe is to remind the customer that because he already has over €50 in the shopping cart, he can get free shipping. Or, if he has between 40 and 49, to make him notice he might get a better deal if buys another product and gets free shipping.

There are four types of Info Windows:

- **Floating Window**
 - This window will no force action by the user and is normally displayed in the bottom corners of the website. This window can be dismissed using the “ESC” key, or the close button, if enabled by you.
- **Modal Window**
 - Modal windows will require action by the user. Either to close it or to click on it. Modal windows will disable background and scrolling until the window is closed. Either by clicking on the close button, if enabled by you, outside of the windows or by pressing the “ESC” key
- **Site Bar Window**
 - This is a bar that sits on top or bottom of your website.
- **Inline Info Block**
 - Displays the banner content at any place in your store. To place the Inline Info Block, just add a widget and choose the window to show. Window contents are only shown when the conditions are met.

To manage your Info Windows, navigate to “Content/Info Windows.”

INLINE WINDOW

When adding a new in-line window, you can insert special variables that will be replaced by actual customer information. If the customer is not logged in, information will be blank.

Variable	Displays
{cart_total}	Current Cart Base Total
{country}	Customer Country
{region}	Customer Region

{city}	Customer City
{customer_name}	Customer Name
{customer_email}	Customer Email



CUSTOMER KPI'S

This extension collects a variety of information from your customer's activity in the store.

Here is a list of collected KPI's and its meaning.

- **Customer ID** - Magento™ Customer ID
- **Email** - Magento™ Customer Email
- **Store View** - Store View ID
- **Loyal** - If the customer is considered loyal or not, based on the result of the formula you defined in the "Formulas" section.
- **Number of visits** - How many visits did the customer made to your store (max one visit per day)
- **Days Abandoned Cart** - Number of days with an abandoned cart
- **Abandoned Cart Totals** - Total Amount in the abandoned cart
- **Abandoned Cart N. Products** - Number of products in the abandoned cart
- **Abandoned Cart Qty** - Total quantity of products in the abandoned cart
- **Days until Anniversary** - Number of days until the customer birthday
- **Age** - Customer Age
- **Date of Birth** - Customer Date of Birth
- **Days Order with Pending Payment** - Number of days since customer's last order and that order has the state 'pending payment.'
- **Pending Payment Date** - The date where the order was made, and payment has yet to be made
- **Days since Last Order** - Days since the customer last completed order (state complete or closed).
- **Last Order Date** - Date of customer's last completed order (state complete or closed).
- **Days since First Order** - Days since the customer first order (state complete or closed).
- **First Order Date** - Date of customer's first completed order (state complete or closed).
- **Number of Reviews** - Number of reviews made by the customer
- **Days since the Last Review** - Number of days since the customer last review
- **Last Review Date** - Date of customer's last review
- **Days since Registration** - Number of days since the customer account was registered
- **Account Registration Date** - Date when the customer account was registered
- **Days Since Last Activity** - Number of days since the customer had any activity in the store. Please note that the customer might have been in the store, but not logged in,
- **Last Activity** - Number of days since the customer last activity
- **Number of Orders** - Number of orders made by the customer with any state
- **Number of Completed Orders** - Number of orders made by the customer with the sate complete or closed.
- **% of Completed Orders** - The percentage of completed order made by the customer

- **Total Orders Amount** - The sum of the grand total from all orders made by the customer with the state complete or closed
- **Base Subtotal Orders** - The sum of the subtotal (grand total minus shipping minus discounts) from all orders made by the customer with the state complete or closed
- **Base Total Shipping** - The sum of the shipping amount from all orders made by the customer with the state complete or closed
- **Base Total Discount** - The sum of the shipping amount from all orders made by the customer with the state complete or closed
- **N. Orders W/ Discount** - The number of orders with the state complete or closed made by the customer where a discount was applied
- **Base Profit** - The sum of the profit made from the customer
- **Base Cost** - The sum of the cost in order made by the customer
- **Base Total Taxes** - The sum of all taxes in orders made by this customer with the state complete or closed
- **Orders Average** - The order amount average from orders with the state complete or closed made by the customer
- **% Orders Amount** - The order average from the customer in comparison to the customer's average. For example: If the order average for the entire store from all customers is 100\$ and the order average for this customer is 120\$, the % of the customer will be 120%. If the order average for the customer was 80\$, the % would be 80%. If this value is over 100%, it means the customer orders above the store average.
- **Orders Average (last Y)** - The same as "Orders Average" but for last year
- **% Orders Amount (last Y)** - The same as "% Orders Amount" but for last year
- **Orders Average (before the last Y)** - The same as "Orders Average" but from the beginning to last year
- **% Orders Amount (before the last Y)** - The same as "% Orders Amount" but from the beginning to last year
- **Avg. Days Between Orders** - The number of days between orders by the customer with the state closed or complete

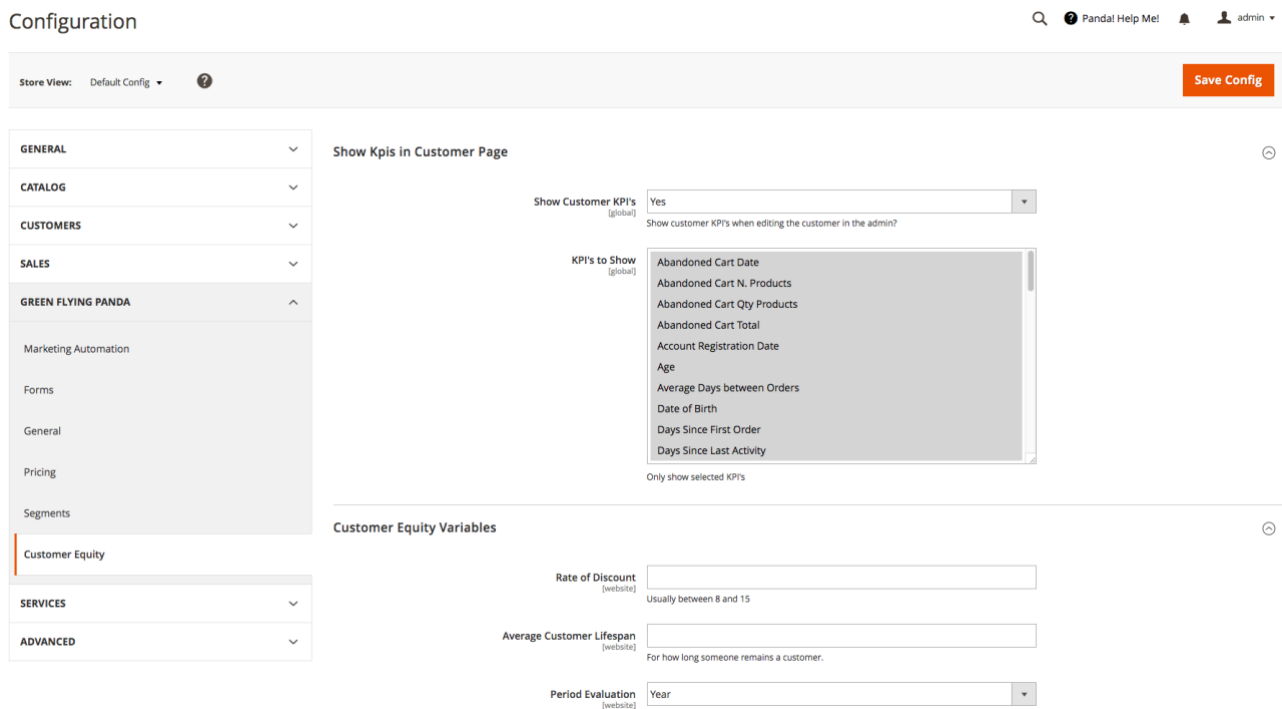
→ To this list of columns, also add the Lifetime Formulas you might have (the column name is the equation name).

FORMULAS

With Customers KPI's information, we can make some calculations to predict future revenues, not only in a global perspective but also in each customer segment.

The first step is to define some value for formulas variables. Please navigate to “Marketing/Marketing/Configuration” and then on the left side choose “Customer Equity.”

You will see a screen like this:



The screenshot displays the 'Customer Equity Configuration' page. On the left, a sidebar lists various configuration categories, with 'Customer Equity' selected under the 'GREEN FLYING PANDA' section. The main area is titled 'Configuration' and includes a 'Store View' dropdown set to 'Default Config'. A 'Save Config' button is in the top right. The 'Show Kpis in Customer Page' section has a dropdown set to 'Yes'. Below this, a list of KPIs is shown, including 'Abandoned Cart Date', 'Abandoned Cart N. Products', 'Abandoned Cart Qty Products', 'Abandoned Cart Total', 'Account Registration Date', 'Age', 'Average Days between Orders', 'Date of Birth', 'Days Since First Order', and 'Days Since Last Activity'. The 'Customer Equity Variables' section includes three input fields: 'Rate of Discount' (with a hint 'Usually between 8 and 15'), 'Average Customer Lifespan' (with a hint 'For how long someone remains a customer.'), and 'Period Evaluation' (set to 'Year').

Figure 33 - Customer Equity Configuration

The first block is used to define whether you want to see customer KPI's on his customer page (in the admin) and which ones do you want to see.

The “Customer Equity Variables” values will potentially be used in the formulas you define.

- **The rate of Discount** - The interest rate used in discounted cash flow (DCF) analysis to determine the present value of future cash flows. Usually between 8 and 15.
- **Average Customer Lifespan** – For how long a customer can remain a customer.
- **Period Evaluation** – When building formulas, you have the option to load values from the current period or globally. How to define a period? (usually year).

MANAGE FORMULAS

To manage your formulas, got to “Customers/Customer KPI's” and on the top right, click “Formulas.”

Formulas results can be seen in the customer segments list and customer KPI's.

Edit Equations

← Back Reset Save

EQUATIONS INFORMATION

Equations Information / Help

General Information

Auto Update Options: Update Daily

Equation 1

Equation 1 Name:

Equation 1 Code:

Please always use operation signs:

[Wrong]
3 ({var_name} * {var_name})

[OK]
3 * ({var_name} * {var_name})

Figure 34 - Formulas - Update

You can define up to ten formulas. You can also define the auto-update option to make sure your equation results are always up to date.

FORMULAS EXAMPLES

While we can have some “common” formulas, most stores should consider defining one that most accurately reflects their needs to get better results. Check the Wikipedia page for more info: https://en.wikipedia.org/wiki/Lifetime_value

```
52 * {global_orders_average} * 65
```

The above formula is the number of weeks, multiplied by the average order amount multiplied by the retention rate of your customers. To view a list of available variables, please check the left tab “Help.”

UPDATING FORMULAS

You can define when equation results should be updated. You can always manually update the results simply by clicking on the button “Run Formulas Now” when in equation listing.

PRODUCT PRICING

DYNAMIC PRODUCT PRICES

The product formula requires a least one variable

If the used variable has no value, all settings will be ignored (including round values), and the original product price will be displayed

Since we have a great amount of valuable information about the customer, we can use that data to improve customer loyalty by defining custom prices per customer.

Formulas can be defined at various levels:

- Globally
 - Product
 - Customer
- Uniquely
 - Products
 - Customers

Globally defined prices are set in the configuration “Marketing/Marketing Automation/Configuration” and then on the left side “Pricing.”

Uniquely defined prices are set when editing the product or the customer in the admin interface.

Prices for customers and products follow the same conventions. We will be giving examples of products, but they work the same way.

While they work the same way, it's not possible to use customer variables (e. and c.) in the product formulas. They must be used in the Customer formulas

When in the configuration page you will see a “Product Section” with the following options:

- Enable
 - If we should enable product pricing
- Global Min Price
 - The global min price is acting as a safeguard to make sure you have control over the dynamic prices. Independently of the product price equation result, the price displayed to the customer cannot be lower than the resulting price from this equation. For that reason, an example equation for the global min price would be
 - $\{p.price\} * 0.7$

- The product min price won't be lower than 70% of the regular product price, even if the product price equation is lower
- Global Max Price
 - The global max price acts the same way as the global min price, but for the max price. Independently of the product price equation result, the price displayed to the customer cannot be higher than the resulting price from this equation. An example equation would be:
 - $\{p.price\} * 0.95$
 - The product max price won't be higher than 95% of the regular product price, even if the product price equation is higher
- Product Price Equation
 - This is the equation that will define the product price. Please use the provided testing tool in the pricing section to test your formula.

The product formula requires a least one variable

If the used variable has no value, all settings will be ignored (including round values), and the original product price will be displayed

- Round Values to xx.99
 - This feature is intended to round prices up when they fall in a certain interval. When you select "Yes," to new fields will appear:
 - Round Upper Values to xx.99.
 - If you insert "50" in this field and the product price generated by the equation is 90.87, the final price will be 90.99.
 - Min Price to Round-Up
 - Useful if you deal with small prices. If you insert 5 in this field, we won't round up decimals for products with the generated price being lower.
- Round Values to xx.49
 - The same as xx.99, but with the .49 threshold.
- Round down to .99 on non-decimal prices
 - If the final price, resulting from the formula, has no decimal points, such 100, whether we should make it a cent cheaper, in the case of 100, change the price to 99.99. 50=>49.99, 47=>46.99, etc.
- Customer Groups
 - Only calculate prices for the specified customer groups

AVAILABLE VARIABLES FOR DYNAMIC PRICING

- $\{p.ATTRIBUTE_CODE\}$
 - All product attributes

- E.g.: {p.price}, {p.cost}, {p.margin}
- {c.ATTRIBUTE_CODE}
 - All customer Attributes
 - E.g.: {c.discount_rate}
- Customer KPI
 - All customer KPI fields
 - E.g.: {e.number_orders}
- Statistical sales
 - sd
 - {sd.qty_invoiced}
 - Quantity invoice in that day for the product
 - {sd.min_price}
 - Min sale price in that day for the product
 - {sd.max_price}
 - Max sale price in that day for the product
 - {sd.avg_price}
 - Average sale price in that day for that product
 - sm
 - {sm.qty_invoiced}
 - Quantity invoice in current month for the product
 - {sm.min_price}
 - Min sale price in current month for the product
 - {sm.max_price}
 - Max sale price in current month for the product
 - {sm.avg_price}
 - Average sale price in current month for that product
 - sy
 - {sy.qty_invoiced}
 - Quantity invoice in current year for the product
 - {sy.min_price}
 - Min sale price in current year for the product
 - {sy.max_price}
 - Max sale price in current year for the product
 - {sy.avg_price}
 - Average sale price in current year for that product
- Conditional Pricing
 - You can use IF in the formulas

```
{{IF {p.price} > 100}}
```



```
{p.price} * 0.9
```

```
{{ELSE}}
```

```
{p.price} * 0.8
```

```
{{/IF}}
```

PRODUCT AND CUSTOMER SPECIFIC FORMULAS

You can enable and disable formulas for specific products and customers. Just edit the product or the customer and you will see two elements, like in the picture below.

To disable price calculation, switch the toggle to “Yes.”

To have a specific equation for the selected product, add it in the “Panda – Price Expression” field.

Panda - Disable Customer Prices [global] ☐ No

Panda - Price Expression [global]

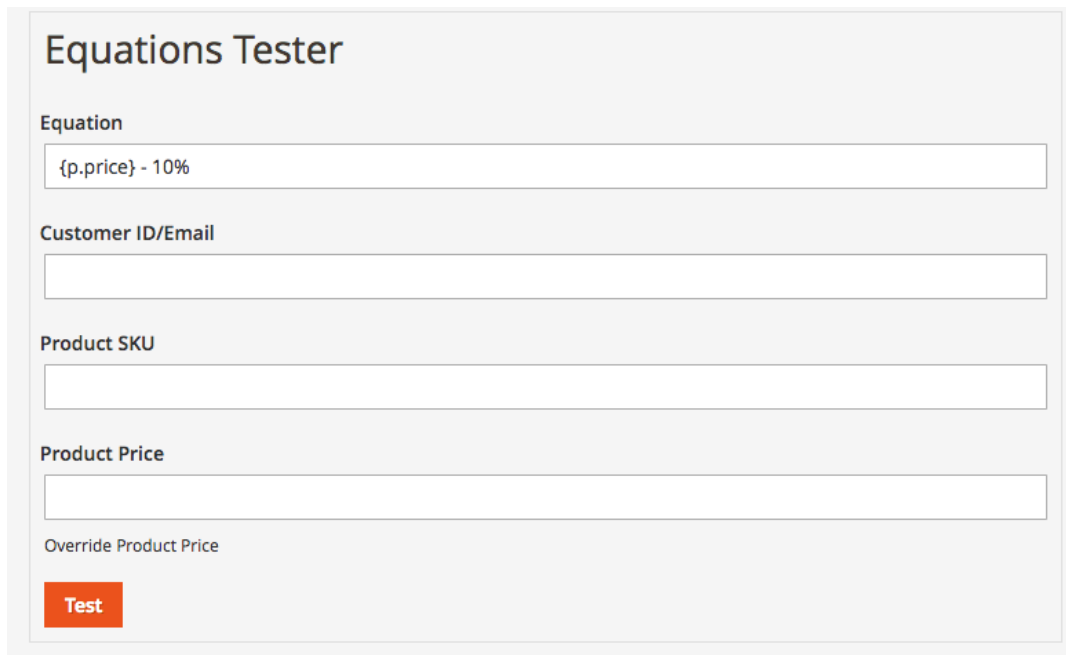
Figure 35 - Custom Price per Product

TEST FORMULAS

While you are on the Price configuration page, you will notice a button up top

Click on the “Open Equation tester” button and a window will open to let you test product prices.

To test prices for a specific customer, please fill the customer field.



Equations Tester

Equation

Customer ID/Email

Product SKU

Product Price

☐ Override Product Price

Test

Figure 36 - Formulas – Tester

PRICES PER CUSTOMER – STATIC FILE

If you need prices per customer and you don't have the need for them to be dynamic, you can import customer prices using the import section (System/Import) from Magento™.

Import file must have the following columns: sku,website,email,price

- sku - Is the product SKU
- website - Is the website code, not the name
- email - Is the customer Email. The customer must already exist in your store
- price - product price

When you edit a customer, you will see a new left tab “Customer Prices” where you can see the customer prices, and if necessary, delete prices.

→ When you enable Customer Prices, you must clear the Page cache for customers to see the changes

Entity Type *

Green Flying Panda - Subscribers

▼

[Download Sample File](#)

Import Behavior *

-- Please Select --

Advanced Pricing

Products

Customers and Addresses (single file)

Customers Main File

Customer Addresses

Stock Sources

Green Flying Panda - Segment Prices

Green Flying Panda - Segment Products

Green Flying Panda - Customer Product Prices

Green Flying Panda - Subscribers

Validation Strategy *

Allowed Errors Count *

10

Figure 37 - Import Customer Prices

→ Importing/deleting customer prices is also available as an API operation.

SALES EXTRA COSTS

Sales Notes are a list of notes you can take so you can keep track of important information and help you to justify sales variations as expected based on that information.

One very important feature this “simple” note taking has, is the ability to specify investment amounts in ad campaigns made and then map that cost to orders/products/customers.

You can add a new note and say, from X to Y date I’m going to run a campaign named “X” (this value should be the `_utm_campaign` value) and I invested \$\$ in it.

When we build product performance and customer equity formulas results, we try to calculate your costs as accurate as possible. We will load information from this extra cost and add these values to the key indicators.

Imagine you are running a campaign from April 1 to April 30 and invested \$1.000. You named that campaign “April_Love”. When we detect an entry in the store from that campaign, we are going to log it with the order if the customer converts. At the end of the month, you have 120 orders originated in that campaign. We are going to split \$1.000 between 25 campaigns and when building equity reports and product performance, we are going to input to each order an extra cost of \$40.

If you don’t want to be that precise, you can say that you are going to spend \$50,000/year on advertising, and we are still able to map costs to orders.

You can see all orders that matched your campaign name in the note sidebar.

REPORTS

PANDA SALES

ORDERS

This report will show you orders made in your store. You will be able to filter by date interval, country, region, gender, age interval or any other customer segment.

EXPECTED REORDERS

In this report we will show you the expected reorders based on recurring purchases by your customers. While most of this information should have been taken care by autoresponders Expected Reorder Time type, this list is usefully to quick and easily identify big re-orders that are supposed to happen. Maybe you want to try a more personal approach in such cases.

The extension lists expected reorders 15 days before and 15 days after they are expected to take place. There is an option at the end of each column for you to lock the record. Meaning it won't be deleted even if the 15 days have passed.

Filters
Default View
Columns
Export

912 records found
15 per page
1 of 61

ID	Name	Cust. ID	N. Sales	Qty Ordered	1° Order	Last Order	Next Order?	Total Spent Product	On Hold?	Action
645	Simple Product 3671	10 010	2	4	Aug 12, 2016	Feb 26, 2017	Oct 2, 2018	€4.00	Yes	Unhold
646	Simple Product 3672	10 010	2	4	Aug 12, 2016	Feb 26, 2017	Oct 2, 2018	€3,193.60	No	Hold
647	Simple Product 3673	10 010	2	8	Aug 12, 2016	Feb 26, 2017	Oct 2, 2018	€79.92	No	Hold
648	Simple Product 3674	10 010	2	10	Aug 12, 2016	Feb 26, 2017	Oct 2, 2018	€99.90	No	Hold
649	Simple Product 3675	10 010	2	3	Aug 12, 2016	Feb 26, 2017	Oct 2, 2018	€3.00	No	Hold
650	Simple Product 3676	10 010	2	5	Aug 12, 2016	Feb 26, 2017	Oct 2, 2018	€5.00	No	Hold
651	Simple Product 3677	10 010	2	4	Aug 12, 2016	Feb 26, 2017	Oct 2, 2018	€39.96	No	Hold
1021	Simple Product 2996	10 018	2	7	Nov 23, 2017	Jan 6, 2018	May 1, 2018	€7.00	No	Hold
1022	Simple Product 2997	10 018	2	5	Nov 23, 2017	Jan 6, 2018	May 1, 2018	€5.00	No	Hold
1023	Simple Product 2998	10 018	2	7	Nov 23, 2017	Jan 6, 2018	May 1, 2018	€35.00	No	Hold
1788	Simple Product 4851	10 038	2	9	Mar 24, 2015	Jun 28, 2016	Jun 23, 2019	€9.00	No	Hold
1789	Simple Product 4852	10 038	2	7	Mar 24, 2015	Jun 28, 2016	Jun 23, 2019	€7.00	No	Hold
1790	Simple Product 4853	10 038	2	7	Mar 24, 2015	Jun 28, 2016	Jun 23, 2019	€7.00	No	Hold
1791	Simple Product 4854	10 038	2	7	Mar 24, 2015	Jun 28, 2016	Jun 23, 2019	€1,631.00	No	Hold
1792	Simple Product 4855	10 038	2	5	Mar 24, 2015	Jun 28, 2016	Jun 23, 2019	€5.00	No	Hold

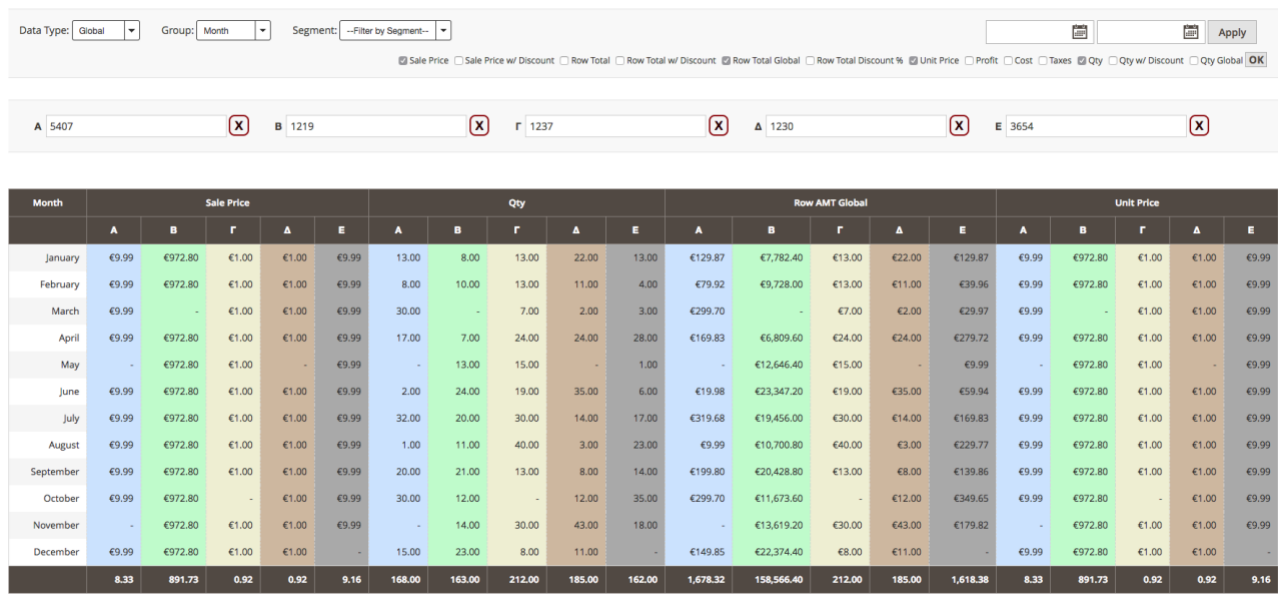
Figure 38 - Expected Reorders

PRODUCT PERFORMANCE

One of the most important reports for you to analyze to show you how a specific product is performing.

In this report you can see key performance indexes for the product. But you can also filter information per country, region, gender, age and any other customer segment you defined.

You can also compare up to 5 products side by side on each key performance index.



A 5407

B 1219

F 1237

A 1230

E 3654

Figure 39 - Product Performance

ATTRIBUTE PERFORMANCE

While product performance is a great tool to have, attribute performance expands the overview of your sales performance by giving you key indicators based on product attributes.

→ Attributes in this report are the ones you choose in the Extension configuration “System/Panda/Configuration/Customer Equity/Reports Attributes”

When you select the attribute, you want to see sales from, the extension will add side-by-side (up to 25 options) for that attribute and show you an heatmap for the key performance indicators. Imagine you want to see how

each brand you sell in your store is performing. This report gives you a nice, quick and easy to understand perspective.

But we have gone a step further. You add a secondary attribute to compare sales performance against.

Imagine you have two attributes. Brand and Color. You can easily see how all your brands are performing, but what about a color per brand? You can select a brand and then the heatmap will display sales for that brand and each color. Sales information will be restricted to that brand and each color.

Once again, you can get information by country, region, gender, age and any other customer segment

Month	Sale Price							Qty						
	Global	Microsoft	Apple	Samsung	Nokia	Xiaomi	LG	Global	Microsoft	Apple	Samsung	Nokia	Xiaomi	LG
January	€138.90	€135.87	€147.12	€147.75	€132.89	€139.57	€129.15	640,269.00	126,980.00	94,544.00	115,291.00	96,736.00	126,630.00	80,088.00
February	€135.58	-	€150.50	€141.32	€128.48	€135.94	€127.54	236,636.00	-	19,960.00	91,092.00	20,352.00	45,024.00	60,208.00
March	€137.33	€141.78	€143.20	€146.69	€132.22	€136.23	€126.29	308,146.00	25,360.00	36,500.00	92,972.00	54,456.00	46,314.00	52,544.00
April	€138.58	€138.21	€141.07	€144.83	€129.25	€144.84	€128.98	277,568.00	41,602.00	57,256.00	66,981.00	18,848.00	51,133.00	41,748.00
May	€136.10	€129.37	€138.76	€155.92	€126.09	€140.65	€122.27	322,215.00	42,977.00	37,452.00	56,868.00	38,500.00	86,210.00	60,208.00
June	€136.30	€132.20	€145.90	€144.69	€127.21	€137.84	€127.24	445,518.00	42,060.00	79,048.00	115,673.00	81,872.00	64,105.00	62,760.00
July	€139.82	€140.45	€146.40	€151.76	€126.71	€137.93	€126.63	405,800.00	77,773.00	38,824.00	113,248.00	60,592.00	96,063.00	19,300.00
August	€133.60	€132.85	€138.90	€144.52	€123.19	€139.41	€125.55	593,557.00	86,836.00	94,144.00	105,642.00	79,912.00	106,723.00	120,300.00
September	€143.99	-	€147.12	€139.43	-	€142.29	-	78,800.00	-	19,084.00	35,633.00	-	24,083.00	-
October	€139.79	€138.06	€150.70	€145.10	€118.13	€138.48	€131.50	348,610.00	67,494.00	49,488.00	72,859.00	19,768.00	118,877.00	20,124.00
November	€140.05	€139.84	€144.02	€151.57	€133.87	€135.89	€134.21	535,316.00	109,192.00	17,948.00	153,180.00	80,632.00	135,164.00	39,200.00
December	€136.52	€130.42	€140.35	€151.67	€128.44	€138.14	€125.43	395,960.00	44,389.00	35,768.00	124,914.00	59,712.00	72,269.00	58,908.00
	138.05	113.25	144.5	147.1	117.21	138.93	117.06	4,588,395.00	664,663.00	580,016.00	1,144,353.00	611,380.00	972,595.00	615,388.00

Figure 40 - Attribute Performance

PRODUCT RELATIONS

Products relations are a report that shows you what products are most purchased by customer when they purchase another.

On a simple language, customers who bought the product Z, mostly bought the product X. That does not mean the purchase was in the same order, next order, or any other relation.

Once again, you can get information by country, region, gender, age and any other customer segment

PRODUCT VENN RELATIONS

This is another crucial report any large company needs to have.

It basically shows you how each product is affecting other. If specify a product and then the system will load the 4 most purchased products with the product and give you the superpositions of sales (cannibalism).

For example: Most customers who buy the product A, also buy the products B, C, D, E. We are going to give you how many customers who bought the product A, also bought product B, C, D and E. And then we are going to give you how many customers who bought product B, also bought products A, C, D and E. Customers who bought product C also bought product A, B, D, E, and so on...

With this report you can identify how the increase of sales of one product can impact the sales of others.

You can manually compare various products.

Once again, you can get information by country, region, gender, age and any other customer segment

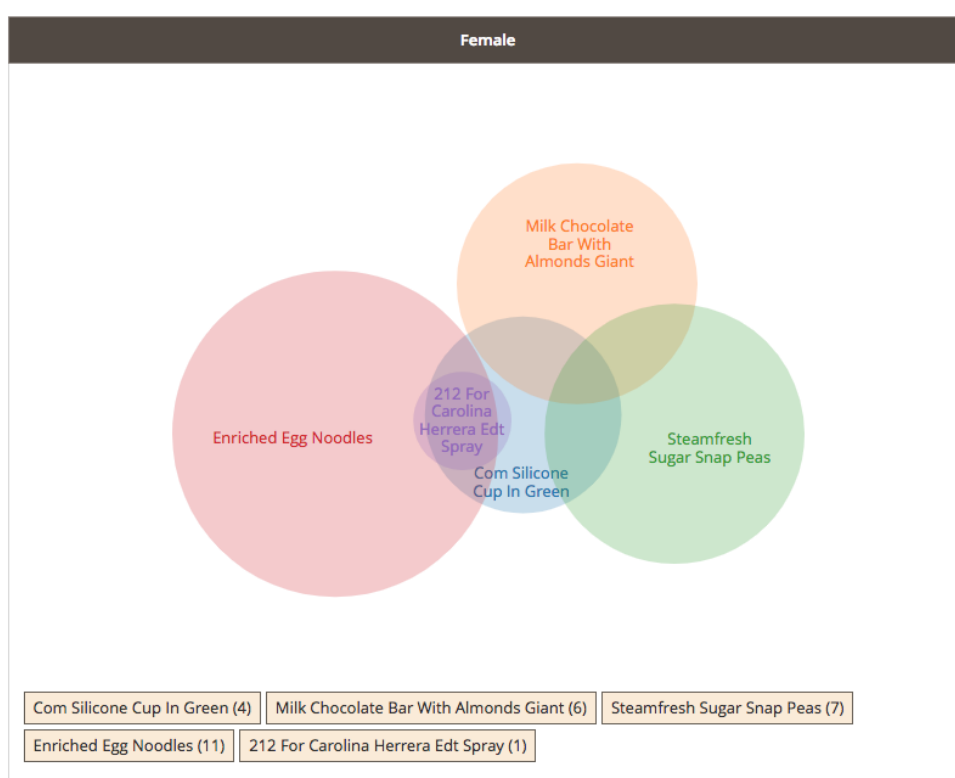


Figure 41 - Venn Example

PRODUCT RECOMMENDATIONS

This will list all records in the recommendation engine. Useful for you to have a place where you can see this type of customer behavior, so you can create promotions and communications accordingly.

SEARCH CLOUD

Will list all search queries by size, usually known as “cloud”. If you click on the word, you will see the full report for that word.

Once again, you can get information by country, region, gender, age and any other customer segment



aeroscope agony agrostographic antimoralist ayurvedic bichloride boucicault
 brawniest brescia bullbat bullishly butler captiously cheese churidars coast
 coleopteran coleus com commentatorially commit crackliest devolatilised diatomicity
 diplex earthiest eogene erosion ethanethiol farrel galloper guberniya history incursive
 instigated isosceles kamikaze khiva kif korfball krupskaya landsting lonicera loy making
 maladroitly misteaching munitied myeloblast naturism netherward nonmoderate
 nonsyllogistic noticing oiliness oleate osler overpronounced overpurchase
 overrealistically perspicuously piazza pitying plinius polygamy preorganizing pretraditional
 radiogram reamalgamated relocating reprovision reputed restrengthen ringed rococo rogatory
 scruff sekondi shakedown sheepwalk siphonage sophia splendiferously spoonful stipular
 subdue suggestibly tathata taunt titania townshend trochaically uncoring undeposited
 universalized unmeddled volleyer volturno widdy ...

Figure 42 - Search Cloud Example

SEARCH PERFORMANCE

This report will show you a list of keywords used in queries and how many times they we used.

Once again, you can get information by country, region, gender, age and any other customer segment

SEARCH VENN RELATIONS

The same principle as in the “product Venn relations” but applied to searches

→ Queries in these reports are only the ones logged in customers, or when we were able to identify the customer made

PRICES VARIATION

Prices variation shows all prices variations for products, including standard deviation.

You can build this report in a global manner or for specific customer groups, since they can have different prices.

To manage your groups, click on “Map Customer Groups” and create the groups you want. Each group can have multiple customer groups.

Prices Variation

Map Customer Groups

Filters

Default View

Columns

Export

1890 records found

20 per page1 of 95

	Variation Group	SKU	Name	Base Price	Qty sold at price	Deviation	First Sale At	Last Sale At
<input type="checkbox"/>	Geral	WS03-XS-Red	Iris Workout Top	\$29.00	65	0	Apr 12, 2019	Jan 9, 2019
<input type="checkbox"/>	Geral	WS08-XS-Blue	Minerva LumaTech™ V-Tee	\$32.00	66	0	Apr 12, 2019	May 24, 2017
<input type="checkbox"/>	Geral	MH03-M-Green	Bruno Compete Hoodie-M-Green	\$63.00	72	0	Jan 16, 2018	Sep 20, 2017
<input type="checkbox"/>	Geral	MH03-L-Black	Bruno Compete Hoodie-L-Black	\$63.00	89	0	Jan 16, 2018	Sep 20, 2017
<input type="checkbox"/>	Geral	MH03-L-Blue	Bruno Compete Hoodie-L-Blue	\$63.00	78	0	Jan 16, 2018	Nov 20, 2018
<input type="checkbox"/>	Geral	MH03-L-Green	Bruno Compete Hoodie-L-Green	\$63.00	71	0	Jan 16, 2018	Nov 20, 2018
<input type="checkbox"/>	Geral	MH03-XL-Black	Bruno Compete Hoodie-XL-Black	\$63.00	83	0	Jan 16, 2018	Dec 28, 2017
<input type="checkbox"/>	Geral	MH03-XL-Blue	Bruno Compete Hoodie-XL-Blue	\$63.00	90	0	Jan 16, 2018	Dec 28, 2017
<input type="checkbox"/>	Geral	MH03-XL-Green	Bruno Compete Hoodie-XL-Green	\$63.00	82	0	Jan 16, 2018	Dec 28, 2017
<input type="checkbox"/>	Geral	MH04-XS-Green	Frankie Sweatshirt-XS-Green	\$60.00	93	0	Jan 16, 2018	Dec 28, 2017
<input type="checkbox"/>	Geral	MH04-XS-White	Frankie Sweatshirt-XS-White	\$60.00	96	0	Jan 16, 2018	Dec 28, 2017
<input type="checkbox"/>	Geral	MH04-XS-Yellow	Frankie Sweatshirt-XS-Yellow	\$60.00	95	0	Jan 16, 2018	Dec 28, 2017
<input type="checkbox"/>	Geral	MH04-S-Green	Frankie Sweatshirt-S-Green	\$60.00	86	0	Jan 16, 2018	Dec 28, 2017
<input type="checkbox"/>	Geral	MH04-S-White	Frankie Sweatshirt-S-White	\$60.00	102	0	Jan 16, 2018	May 3, 2017
<input type="checkbox"/>	Geral	MH04-S-Yellow	Frankie Sweatshirt-S-Yellow	\$60.00	93	0	Jan 16, 2018	Mar 1, 2019
<input type="checkbox"/>	Geral	MH04-M-Green	Frankie Sweatshirt-M-Green	\$60.00	73	0	Jan 16, 2018	Mar 1, 2019
<input type="checkbox"/>	Geral	MT01-XL-Orange	Erikssen CoolTech™ Fitness Tank-XL-Orange	\$29.00	98	0	Apr 26, 2018	Jul 13, 2018
<input type="checkbox"/>	Geral	MT01-XL-Red	Erikssen CoolTech™ Fitness Tank-XL-Red	\$29.00	101	0	Apr 26, 2018	Jul 13, 2018
<input type="checkbox"/>	Geral	MT02-XS-Gray	Tristan Endurance Tank-XS-Gray	\$29.00	88	0	Apr 26, 2018	Jul 13, 2018
<input type="checkbox"/>	Geral	MT02-XS-Red	Tristan Endurance Tank-XS-Red	\$29.00	99	0	Apr 26, 2018	Jul 13, 2018

Actions:

Reset Table:

Click here to clear all data and rebuild in background. Should also be executed when new Customer Group Mapping is added

Update:

Click here to update to the most recent data in background

Notes:

Qty Sold:

Refers to the qty sold at the line price

Deviation:

Refers to the deviation from all previous sales up to that point

First Sale At:

Refers to the date the first sale was made at line price

Last Sale At:

Refers to the date the last sale was made at line price

Figure 43 - Prices Variations

An explanation about fields:

- Base Price – The base price that the product was sold
- Qty sold at price – The number of products that were sold at that specific price, and not trough all product sales
- Deviation – The standard deviation in relation to previous sales of the same product. If you change your product price monthly, each month deviation includes all previous months.
- First Sale at – The date the first sale was made with the product at that price
- Last Sale at – The date the last sale was made with the product at that price

This information is obtained from your invoices table and is updated daily.

CRONS

The following is a list of crons commands executed by this extension.

→ This cron jobs run under the group "panda". So, you can setup a separated cron task using the command below

```
bin/magento cron:run --group=panda
```

Job Code	Runs	Description
panda_autoresponders_activity	Every 15 minutes	Checks for customer store activity to cancel autoresponders with the activity cancellation trigger selected
panda_autoresponders_activity_daily	Daily at 1:15 am	Checks for customer activity to deploy autoresponders with the trigger "Last Activity"
panda_autoresponders_birthdays	Daily at 1:35 am	Checks for autoresponders with the birthday trigger
panda_autoresponders_abandoned	Every 15 minutes	Checks for autoresponders with abandoned cart trigger
panda_import_customers	Every day at 5:45 am	Checks if the option to add new customers as subscribers. Will scan the orders table and import emails that are not already in the subscriber's table. This option can be changed in "System/Green Flying Panda/Configuration/Marketing Automation/Import Existing Customers"
panda_clear_old_stats	Every Sunday at midnight	Clear old stats. This option can be changed in "System/Green Flying Panda/Configuration/Marketing Automation/Number of days to keep campaign reports"

panda_reports	Every day at midnight	Builds Marketing communications report that can be found in "Reports/Green Flying Panda/Marketing Data Evolution"
panda_goals_build	Every day at 5am	Updates Goals progression
panda_process_bounces	Every day at 3am	Opens your bounces email and processes any message in that folder. If bounces are found, the number of bounces in the subscriber are updated. Using bounces is defined in Email Senders
panda_autoresponders_execute	Every minute	Creates autoresponders campaigns to be sent
panda_splits_send	Every minute	Creates A/B campaigns to be sent
panda_followup_send	Every minute	Creates Follow-Up campaigns to be sent
panda_campaigns_queue	Every minute	Builds campaign queue
panda_campaigns_fix_issues	Every 12 hours (0/12)	Since no message can be sent to the same subscriber twice (FK enforcement), this will force campaigns to send messages. Unlikely to happen, but sometime the cron might not have been executed, or an error in the remote server occurred.
panda_emails_send	Every minute	Sends queued emails
panda_sms_send	Every minute	Sends queued SMS
panda_build_stats	Every day at 1am	Builds Customer Metadata used by Segments.
panda_build_segments	Daily at 2am	Refreshes Customer Segments Records



panda_build_segments_user	Upon Admin Request	When the store manager is editing a segment and clicks in the "Refresh Records", this job will be added to the cron schedule to update that segment
panda_build_formulas	Daily at 2:40am	Updates Formulas results
panda_sync_customer_subscriber_data	Every Sunday at midnight	Syncs customer data (firstname, gender, lastname, date of birth) with subscriber data. This is just as a backup method, since this info should be mirrored in real-time
panda_build_metadata	Upon Admin Request	Rebuilds Customer Segments Metadata
panda_build_rebuild	Upon Admin Request	Rebuilds Customer Equity Data
panda_build_order_average	Every Monday at 1:20 am	Updates Customer percentage order average in relation to the store sales
panda_build_meta_old	Daily at 1:20am	Updates Customer Segments metadata related to the previous 6 months
panda_send_error_reports	Daily at 1:20am	Sends error reports back to Green Flying Panda. This option is disabled by default and can be changed in "System/Green Flying Panda/Configuration/General/Send error reports back to Green Flying Panda"
panda_rebuild_sales_stats_yesterday	Daily at 4:40am	Builds sales stats for previous day
panda_indexer_rebuild_invalidated	Every 30 minutes	Rebuilds indexers marked as invalid (System/Green Flying Panda/Indexers)
panda_products_recommendations_female	Every Monday at 6am	Builds Customer Recommendations
panda_products_recommendations_yesterday	Daily at 5:02 am	Builds Recommendations with data from previous days
panda_rebuild_expected_sales	Daily at 2:20am	Updates Expected Sales Report
panda_rebuild_relations	Every Monday at 1:30am	Rebuilds Products Relations Report
panda_rebuild_relations_yesterday	Daily at 1:30am	Builds Products Relations with data from previous day
panda_update_segments_evolution	Daily at 1:20am	Build Segments Records Evolution Report
panda_rebuild_search_history	Daily at 4:20am	Builds Search History Report
panda_sales_extra_costs_update_extra_costs	Daily at 1:35am	Updates Sales Extra Costs data
panda_update_sex_and_gender_prediction	Daily at 1:55am	Updates Customer gender and age prediction based on previous purchases.
panda_update_real_time_segments	Every minute	Updates required customer segment records
panda_import_data	Every 2 minutes	Processes Schedule Imports

COMMAND LINE

List of command line commands that can be executed to perform action in this extension

Command	Description
bin/magento pand:rebuild equity;	Rebuilds Customers Equity Data. Rebuild for a specific customer only by providing as an input the Customer ID
bin/magento panda:rebuild reorders;	Rebuilds Expected Reorders Report
bin/magento panda:rebuild performance;	Rebuilds Product Performance Reports
bin/magento panda:rebuild relations;	Rebuilds Product Relations Reports
bin/magento panda venn;	Rebuilds Product Venn Reports
bin/magento panda:rebuild recommendations;	Rebuilds Product Recommendations Reports
bin/magento panda:rebuild sales;	Rebuilds Sales Reports
bin/magento panda:rebuild segments;	Rebuilds Customer Segments Records
bin/magento panda:rebuild searchperformance;	Rebuilds Search Performance

If you want to run multiple commands, please use the method below, since there is an order, they are supposed to run

SHORTCUT

As a shortcut to execute multiple commands, you can run the following:

```
bin/magento panda:rebuild [indexers...,]
```

where indexers can be empty (will execute all commands listed above), one or more of these values (listed by the order they are executed if multiple are run):

1. equity
2. reorders
3. performance
4. relations
5. venn

6. recommendations
7. sales
8. segments
9. search_performance
10. search_history



IMPORT - SCHEDULE

If you synchronize your store information with external sources, you might need to automate this process, as some external/old applications are not ready yet to take advantage of webservices/APIs.

Our response to these situations is scheduling importing. You will be able to import any existing Magento™ entity (customers, stocks, products) in an automated way. You can import files that are in your server's hard drive, or by using FTP, SFTP and URL.

Navigate to “Systema/Data Transfer/ Import - Schedule” and you will see a list of existing schedules.

Scheduled Import

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[New Scheduled Import](#)

Filters Default View Columns Export

4 records found

20 per page 1 of 1

<input type="checkbox"/>	ID ↑	Name	Entity Type	Runs	Last Executed	Last Outcome	Next Execution	Active	Actions
<input type="checkbox"/>	5	Products	Products	At 00:00 on the 1st and the 15th of every month.	Aug 8, 2020 01:33	Success	Aug 15, 2020 00:00	Yes	Edit
<input type="checkbox"/>	4	Local	Green Flying Panda - Subscribers	At 00:00 on the 1st and the 15th of every month.	Aug 7, 2020 23:03	Success	Aug 15, 2020 00:00	Yes	Edit
<input type="checkbox"/>	3	FTP	Green Flying Panda - Subscribers	At 00:00 on every day.	Aug 7, 2020 23:00	Success	Aug 8, 2020 00:00	Yes	Edit
<input type="checkbox"/>	2	SSH	Products	At 00:00 on every day.	Aug 8, 2020 01:40	Success	Aug 9, 2020 00:00	Yes	Edit

Figure 44 - Schedule Import

To add a new Schedule, click on the “New Schedule Import”.

Most of the fields you will encounter are the ones you see when you do a manual import. We will be talking about the other ones.

Cron Expression – This is a select menu with the most common times. You can choose one from the list or choose the option “Custom Expression”. Doing so, will display a new field below where you can manually input your CRON expression. Please note that the cron process only runs every two minutes. Defining a “every minute” cron will not run every minute, but every two minutes. The extension will validate your cron expression on saving.

After Import Action – When the import process is done, what action should we take on processed (local or remote) files/images. Choosing “archive” will create a new “archives” folder in your remote host and processed files/images will be moved there. Choosing “delete” will delete the files/images.

Server Type – Choosing “Local” offers the same options as a native “Import” from Magento™ offers. Choosing “Remote - FTP” or “Remote SFTP” will display additional fields, mainly to get connection information. It's

important to remember that paths for “Local” and “Remote” should be entered differently. “Local” is the path relative to the Magento™ installation, and “Remote” is the full path in the source server.

Email Notifications – Since this is an automated process, when an error occurs the system can email you detailing the error so you can take further action. Add multiple emails by separating them with a comma “,”.

Data Mappings – In this table you can specify data mappings between Magento™ columns and remote columns. For example, if in the remote file the column “sku” is named “ean”, you can use mapping to rename the “ean” column to “sku”.



ISSUES

This extension logs the errors thrown when it's executed.

To view these issues, navigate to “System/Green Flying Panda/Issues”. If you see records in this list, you might want to send them to us for further analysis. Submit a bug report, in “System/Green Flying Panda/Support” and mark the option “Attach Debug Information”.

Issues

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admin

Filters

Default View

Columns

Export

22 records found

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	ID	Created At	Message	File	Line
<input type="checkbox"/>	22	Jun 4, 2020 16:21	ois	/home/panda/demo.greenflyingpanda.com/app/code/Licentia/Panda/Controller/Adminhtml/Autoresponders.php	101
<input type="checkbox"/>	21	Jun 3, 2020 21:14	"Message rejected by local rules"	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Abstract.php	431
<input type="checkbox"/>	20	Jun 3, 2020 21:13	"Message rejected by local rules"	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Abstract.php	431
<input type="checkbox"/>	19	Jun 3, 2020 21:11	Could not read from mail.greenflyingpanda.com	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Abstract.php	385
<input type="checkbox"/>	18	Jun 3, 2020 21:09	Could not read from mail.greenflyingpanda.com	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Abstract.php	385
<input type="checkbox"/>	17	Jun 3, 2020 21:07	Could not read from mail.greenflyingpanda.com	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Abstract.php	385
<input type="checkbox"/>	16	Jun 3, 2020 21:05	Could not read from mail.greenflyingpanda.com	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Abstract.php	385
<input type="checkbox"/>	15	Jun 3, 2020 21:02	Could not read from mail.greenflyingpanda.com	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Abstract.php	385
<input type="checkbox"/>	14	Jun 3, 2020 21:00	cannot read - connection closed?	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Imap.php	140
<input type="checkbox"/>	13	Jun 3, 2020 20:59	Could not read from mail.greenflyingpanda.com	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Abstract.php	385
<input type="checkbox"/>	12	Jun 3, 2020 20:55	"Message rejected by local rules"	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Abstract.php	431
<input type="checkbox"/>	11	Jun 3, 2020 20:54	host doesn't allow connection	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Imap.php	109
<input type="checkbox"/>	10	Jun 3, 2020 20:52	host doesn't allow connection	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Imap.php	109
<input type="checkbox"/>	9	Jun 3, 2020 20:50	Incorrect authentication data	/home/panda/demo.greenflyingpanda.com/vendor/magento/Zend/Mail/Protocol/Abstract.php	431
<input type="checkbox"/>	8	Jun 3, 2020 20:48	Registry key "panda_popup_data" already exists	/home/panda/demo.greenflyingpanda.com/vendor/magento/framework/Registry.php	60
<input type="checkbox"/>	7	Jun 3, 2020 19:02	Registry key "panda_popup_data" already exists	/home/panda/demo.greenflyingpanda.com/vendor/magento/framework/Registry.php	60
<input type="checkbox"/>	6	Jun 3, 2020 18:27	Registry key "panda_popup_data" already exists	/home/panda/demo.greenflyingpanda.com/vendor/magento/framework/Registry.php	60
<input type="checkbox"/>	5	Jun 3, 2020 16:23	Registry key "panda_popup_data" already exists	/home/panda/demo.greenflyingpanda.com/vendor/magento/framework/Registry.php	60
<input type="checkbox"/>	4	Jun 3, 2020 16:05	Registry key "panda_popup_data" already exists	/home/panda/demo.greenflyingpanda.com/vendor/magento/framework/Registry.php	60
<input type="checkbox"/>	3	Jun 3, 2020 16:05	Registry key "panda_popup_data" already exists	/home/panda/demo.greenflyingpanda.com/vendor/magento/framework/Registry.php	60

Figure 45 - Issues Grid

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API

List of Entities with API's

1. Forms
2. Subscribers
3. KPI's
4. Formulas
5. Segments

→ Note: We only list below "uncommon" operations. Entities have the save/search/list/delete/update as expected

CUSTOMER KPI'S

Method	Endpoint	Description
GET	/V1/panda/kpis	Returns a List of all KPI's values for customers

INLINE INFO WINDOWS

Method	Endpoint	Description
GET	/V1/panda/infowindows/:zone/:identifier	<p>Returns one single record for an Info Window Inline Block. :zone</p> <p>Eg: zone[c]=product&zone[m]=catalog&zone[a]=view&zone[i]=24177 c = controller m = module a = action i = is :identifier Info Window Identifier</p>

PRODUCT RECOMMENDATIONS

Method	Endpoint	Description
GET	/V1/panda/recommendations/:zone/:sku	Returns products recommendations :zone Identifier :sku List of SKU's to use for recommendation if required by the loaded recommendation

SUBSCRIBERS

Method	Endpoint	Description
GET	/V1/panda/subscribers/me	Returns Information about the current subscriber (logged in customer)
GET	/V1/panda/subscribers/me/status	Returns status for logged user
POST	/V1/panda/subscribers/subscribe/:email	Subscribes Customer
POST	/V1/panda/subscribers/unsubscribe/:email	Cancels Customer Subscription
GET	/V1/panda/subscribers/status	Returns a list of available subscription status

FORMS

METHOD	Endpoint	Description
GET	/V1/panda/formentries/code/:code	Returns entries in the form with the provided code

METHOD	Endpoint	Description
GET	/V1/panda/formentries/display/:formentriesId	Returns a form entry with formatted data ready to be displayed to users

CUSTOMER PRICES

Method	Endpoint	Description
POST	/V1/panda/prices	Adds/Updates customer prices
DELETE	/V1/panda/prices	Delete customer prices

SEGMENT PRODUCTS

Method	Endpoint	Description
POST	/V1/panda/segments/products	Adds products to a segment
DELETE	/V1/panda/segments/products	Deletes products from a segment

INDEXERS

Green Flying Panda uses indexes for performance reasons. Reports queries would be too much expensive to build on request. That's why there might not be up to date.

It's up to you and your developers to define what's the best strategy to rebuild them, so the information can still be very relevant but without the need to every single day spend server resources updating data to the latest point.

If your store is more than a year old, you probably already can have a pretty good idea of your store evolution without requiring daily reports updates.

If your dev team decided to rebuild reports and meta information on a schedule, most likely this page won't be very useful to you, other than get info.

I, however, for any reason you need to update some information to the most recent state, you can hit the "Force Rebuild" link in the last column.

It's recommended updating indexes from the command line.

Indexers

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Rebuild All Values

Indexer ID	Description	Updated At	Status	Info	Command line rebuild code (in your doc root)	Reindex
equity	Customer equity values (number of orders, amounts, etc.)	Dec 15, 2019 8:33:47 PM	VALID	Real-time update / manually update	php bin/magento panda:rebuild equity	Full Rebuild using CRON
performance	Product Sales Performance	May 14, 2019 5:22:49 PM	VALID	Daily update for previous day @1:30am FULL rebuild every monday @1:30am	php bin/magento panda:rebuild performance	Full Rebuild using CRON
recommendations	Product Recommendation Metadata	Mar 1, 2020 6:03:06 AM	VALID	Daily update for previous day @1:30am FULL rebuild every monday @6:00am	php bin/magento panda:rebuild recommendations	Full Rebuild using CRON
relations	Product metadata for Recommendations	May 14, 2019 5:23:23 PM	VALID	Daily update for previous day @1:30am FULL rebuild every monday @1:30am	php bin/magento panda:rebuild relations	Full Rebuild using CRON
reorders	Expected Reorders	Mar 18, 2020 2:20:06 AM	VALID	Daily update @2:20am	php bin/magento panda:rebuild reorders	Full Rebuild using CRON
sales	Sales analytics	Mar 18, 2020 4:30:08 AM	VALID	Daily update @3:40am	php bin/magento panda:rebuild sales	Full Rebuild using CRON
search_history	Search History Data	May 9, 2019 9:46:56 PM	VALID	Daily update @4:20am	php bin/magento panda:rebuild search_history	Full Rebuild using CRON
search_performance	Search metadata	May 29, 2019 8:44:36 AM	VALID	FULL rebuild every monday @2:20am	php bin/magento panda:rebuild search_performance	Full Rebuild using CRON
segments	Customer Segments	Dec 3, 2019 12:09:25 AM	VALID	Per-Segment option / manually update	php bin/magento panda:rebuild segments	Full Rebuild using CRON
venn	Venn Analytics	May 14, 2019 5:24:18 PM	VALID	FULL rebuild every monday @3:20am	php bin/magento panda:rebuild venn	Full Rebuild using CRON

Figure 46 - Indexers