# Installation
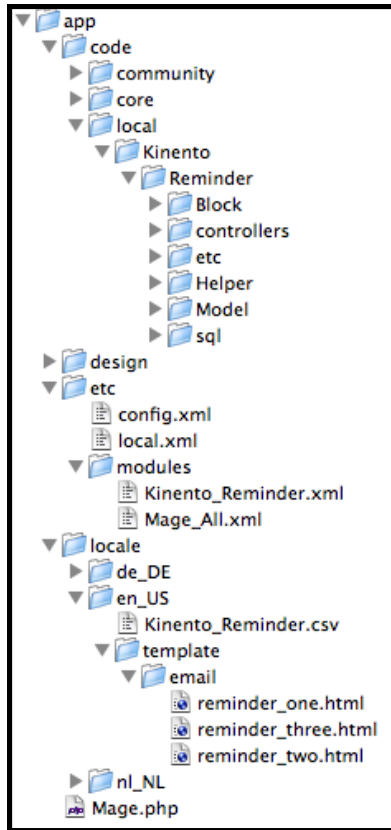
**Installing the module**

1. Merge the provided app folder with Magento's root directory (containing an existing app folder). The folder structure should now be similar to:
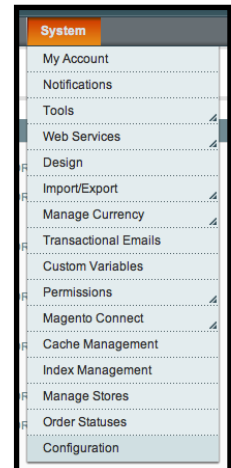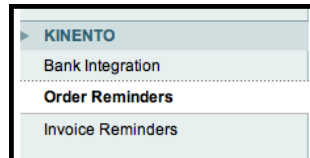


   Please make sure that:

   a) The folder app/code/local contains the Kinento folder.

   b) The folder app/etc/modules contains the file Kinento_Reminder.xml.

   c) The folder app/locale/xx_XX/template/email contains the files reminder_one.html, reminder_two.html and reminder_three.html.

   d) The folder app/locale/xx_XX contains the file Kinento_Reminder.csv.

2. Navigate to System → Cache Management. Set All Cache to Refresh and press the Save cache settings button.

3. Log out and log in again to the Magento back-end.

4. Make sure the module is enabled in the System → Configuration → Advanced menu.

# Configuration (1/3)

**Accessing the configuration panel**

To access the configuration panel, perform the following steps:

1. Navigate to System → Configuration.

2. In the options tab under Kinento, select Order Reminders.

**Configuring the time criteria**

Under the header Time criteria, you will find options to configure the time criteria for reminders according to your wishes. There are various settings for both types of customers (On-account and Prepaid):

- First notification after is the total amount of days after which a first notification email will be sent to the customer. This uses the template reminder_one.html.

- Second notification after is the total amount of days after which a second notification email will be sent to the customer This uses the template reminder_two.html.

- Third, fourth, fifth, etc. is the amount of days (after the previous email) after which another notification email will be sent to the customer. This uses the template reminder_three.html for all emails.

- Cancel orders automatically after allows orders to be canceled automatically after a given number of days.

- Exclude weekends from order age count the age of an order with (disabled) or without (enabled) weekends.

If you only want to send out a limited amount of reminders (e.g. 1 or 2), then you can simply use large values (e.g. 99999) for the Second notification after and/or Third, fourth, fifth, etc. settings.

# Configuration (2/3)

**Configuring the general settings**

Under the header General settings, you will find various additional settings. They are as follows:

- Under Include orders starting from, filling in the date for which the module should start considering sending reminders. This could be set as the installation date of the module, or can be well into the past. The date has to be entered as a UNIX timestamp (see unixtime-stamp.com). For example, the time-stamp 1325397600 is equal to the first of January 2012.

- Include orders using payments allows you to enable/disable orders with a particular payment type. Orders with unselected payment types will be visible in the Order Reminders grid, but will not receive any reminder emails.

- Include orders with status allows you to select a list of statuses that you want the module to consider for email reminders. Orders with other statuses will not appear in the Order Reminders grid and will not receive any reminder emails.

**General settings**

| Include orders starting from | 1257853617 |

▲ input as a UNIX timestamp (see unixtimestamp.com)

Include orders using payments:
- Credit Card (saved)
- Check / Money order
- No Payment Information Required
- PayPal Billing Agreement
- Pago via BBVA Bancomer (sucursales y banca p
- Pago via Transferencia electronica desde cualqu

Include orders with status
- Canceled
- Closed
- Complete
- Suspected Fraud
- On Hold
- Payment Review
- Pending
- Pending Payment
- Pending PayPal
- Processing

On-account customers are in the following group(s)
- NOT LOGGED IN
- General
- Wholesale
- Retailer
- QAAAA

▲ Prepaid customers are set to all other groups

- On-account customers are in the following group(s) specifies which customers belong to the two groups. On-account customers are those selected, and Prepaid customers are those not selected.

# Configuration (3/3)

**Configuring email settings**

Under the header Email settings, you will find various settings related to the reminder emails. They are as follows:

- Send a copy to the following email address allows you to send a copy of all reminder emails to your own email address. If you do not wish to use this feature, simply fill in nothing.

- With the options First reminder template, Second reminder template, and Third reminder template, you are able to select which template to use. There are 3 templates provided for the module, but you can also use Magento's Transaction Emails to create templates through the Magento interface. The default templates are written in HTML and can be edited using a text editor (outside Magento).

- With the options Attachments for on-account customers and Attachments for prepaid customers you can choose whether or not to add a PDF attachment to the reminder email containing the invoice data.

- With Special text for on-account customers and Special text for prepaid customers you can enter text which is different for both types of customers. This text can be inserted in the email templates using the variable customergroupdata.

- Finally, you can distinguish two types of email reminders based on the payment type. Under Orders with these payments are in the `normal' group, the selected payment types will see the text entered under Special text for normal payments when using the variable paymenttypedata in the reminder emails. Vice-versa for the text entered under Special text for `alternative' payments.

# The Order Reminders grid

**Accessing the grid**

Navigate to Sales → Order Reminders.

**Using the grid**

The Send reminders now button on the top right does exactly the same as the cronjob: automatically send email reminders. You can use this button to send reminders manually if you do not have a cronjob set-up. Using this button will behave according to your settings. That means that it will check if orders are old enough, payment methods are enabled, notifications are enabled, etc.

For each row (one order per row), the grid has a few buttons which are explained below:

- The add 1, remove 1, and reset to 0 buttons can be used for debugging or to manually influence the amount of reminder emails sent. The value in the column (Reminders sent) shows the amount of reminder emails sent so far. This number is used to determine which reminder email to send next. Using the 3 buttons, this number can be artificially incremented (add 1), decremented (remove 1), or reset to zero (reset to 0).

- The Disable notifications and Enable notification buttons allow you to individually enable or disable orders from the automatic (cronjob) or manual (Send reminders now button) reminder email sending process. These buttons are also available as a mass action (Enable selected and Disable selected).

- The Force send reminder now button next to the individual orders will in contrast not care about settings or the age of an order. Instead, this button will always send a reminder to the customer. This button is also available as a mass action (Force send reminder(s) now).

# Troubleshooting

Before performing troubleshooting, open the files var/log/exception.log and var/log/system.log. In these files, search for the word Kinento. It it occurs, check the error message and perform the following troubleshooting steps.

If you have problems with the **Order Reminders** module, please follow the step-by-step troubleshooting approach illustrated on this page. Please follow the steps in order until you find a problem. If you find a problem at e.g. step 2, do not bother trying step 3. Instead, perform the suggested solutions and debugging.

**Troubleshooting step 1:** *I cannot see the button* Order Reminders *under* Sales.

    a)    The module is not correctly installed. Please re-install and follow the guidelines in detail. After installation, make sure you refresh the Magento cache and log-out and log-in again.

**Troubleshooting step 2:** *Accessing the* Order Reminders *grid (under* Sales*) does not work.*

    a)    The module is not correctly installed. Please re-install and follow the guidelines in detail. After installation, make sure you refresh the Magento cache and log-out and log-in again.

    b)    If the Order Reminders grid shows, but is empty, double check if you have orders that match the Include orders with status configuration. To be sure, select all statuses in the configuration options.

**Troubleshooting step 3:** *The module says that a reminder email is sent when I use the* Force send reminder now *button, but my customer did not receive any email.*

    a)    Double check if your server has a mail-server set-up. Do your customers receive emails in other ways (e.g. when submitting an order)?

    b)    Double check if you installed the templates in the correct place (and the correct locale). Alternatively, you can also try creating a new template using Magento's Transactional Emails.

    c)    Use the configuration options to send a copy to your own email address. Double check if the address is correct.

**Troubleshooting step 4:** *The* Force send reminder now *button works, but the module says that no reminders are sent when I use the* Send reminders now *button.*

    a)    None of your orders meet the criteria you set in the configuration options. Please double check this.

    b)    Please check under Sales → Order Reminders if the Disable notifications and Payment method columns for a given row show Enabled. If not, change the settings.

    c)    Please check under Sales → Order Reminders if the Order status and Order type match those in your settings.

    d)    Make sure that the orders are old enough. Double check the Reminders sent column to see how many reminders are already sent.

**Troubleshooting step 5:** *Using the* Send reminders now *button works, but reminders are not sent automatically.*

    a)    You have to set-up a cronjob. To do this, look for a manual on the internet or ask your system administrator. Check your cron_schedule table in the Magento database to make sure the cronjob was correctly set-up.

    b)    To send the reminders manually, use the Send reminders now button.

# Variables available in reminder email templates

Here is a list of variables that can be used in the reminder email templates. They can be used in the HTML templates (as provided with the module) or through Magento's Transaction Emails. An example of the usage is:

*{{htmlescape var=$customername}}*

| VARIABLE NAME | DESCRIPTION | EXAMPLE |
|---|---|---|
| customername | Name of the customer | John Doe |
| shippingname | Name of the customer (shipping) | John Doe |
| customeremail | Email address of the customer | john@doe.com |
| order | The order itself. This can be used further to call functions on the order, e.g. $order->getOrderId() | - |
| orderid | The order ID | 100000041 |
| orderincrementid | The order increment ID | 48 |
| orderdate | The date of the order | 08-10-2009 |
| orderamount | The total amount of the order | 54,29 |
| invoices | The invoices belonging to the order. This can be used further to call functions on the invoices. | - |
| invoiceid | The ID of the invoice | 100000041 |
| storeid | The ID of the store | 2 |
| payment | The order's payment details. This can be used further to call functions on the payment. | - |
| paymentmethod | The method of payment | Check / Money order |
| customergroup | The configured group | On-account |
| customergroupdata | The special configured customer group specific text | We encourage you to pay as soon as possible for the items you purchased. |
| paymenttype | The configured payment type | Normal |
| paymenttypedata | The special configured payment type specific text | Example special text for 'normal' payments. |
| remindercount | The amount of reminders sent | 2 |

# Frequently asked questions (1/3)

**Should I use Order Reminders or Invoice Reminders?**

If you are unsure, install the Order Reminders module. This suits most customers best. The difference is that the Order Reminders module triggers reminders based on the statuses of your orders (e.g. pending). The Invoice Reminders module triggers reminders based on the statuses of your invoices. Which module to install depends on the workflow in your Magento shop.

**What do the different buttons do in the Order Reminders grid?**

a) The Send reminders now button on the top right does exactly the same as the cronjob: automatically send email reminders. You can use this button to send reminders manually if you do not have a cronjob set-up. Using this button will behave according to your settings. That means that it will check if orders are old enough, payment methods are enabled, notifications are enabled, etc.

b) The Force send reminder now button next to the individual orders will in contrast not care about settings or the age of an order. Instead, this button will always send a reminder to the customer.

**How can I test the reminder module?**

a) Use the configuration options and enter your own email address. This will make sure you receive a copy of every reminder email.

b) Use the buttons on the Order Reminders grid to send emails manually (using Send reminders now and Force send reminder now).

**The module reports that a reminder has been send, but my customer did not receive anything**

See troubleshooting step 3.

**At what frequency is the cronjob executed and how do I change it?**

a) Navigate to the directory app/code/local/Kinento/Reminder/etc and open the file config.xml.

b) Locate the line containing <schedule><cron_expr>*/15 * * * *</cron_expr></schedule>, which makes the cronjob execute every 15 minutes.

c) Check the internet for an explanation of the format (e.g. at *http://www.adminschoice.com/docs/crontab.htm*).

d) Changing the line to <schedule><cron_expr> 30 01 * * * </cron_expr></schedule>  will for example execute the cronjob every day at 1:30.

**My custom status is not available as an option in the configuration panel. What should I do?**

a) Open the file Kinento/Reminder/Model/Statuses.php in a text editor.

b) In the getAllOptions function, duplicate one of the existing lines starting with $this->_options[].

c) Change the values for value (important for correct functionality) and label (just for visualization) to match your custom status.

**I receive an error:** *Fatal error: Call to a member function toValue() on a non-object* **when loading the grid**

In the file Kinento/Reminder/Block/View/Main/Widget/Column/Renderer/Reminderssent.php at line 28 replace: "$age = $now->sub($orderdate)->toValue();" with "$age = $now->sub($orderdate);". The "toValue()" part is apparently not necessary (and usable) for Magento 1.4.x. For newer versions, that particular functionality does not work without the "toValue()" part.

# Frequently asked questions (2/3)

**What are on-account and prepaid customers? Where are they defined?**

The module is able to distinguish two types of customers. These two types are given names in the module: 1) On-account customers, and 2) Prepaid customers. You can define these customer groups in the configuration panel of the module.

**How do I change the source email address of the reminders?**

Per default, it uses Magento's default email address. You can change it as follows:

a)   Open the file Kinento/Reminder/Model/Sender.php in a text editor.

b)   Locate the line Mage::getStoreConfig( self::XML_PATH_EMAIL_SENDER, $order->getStoreId() ), (Found in line ±393 in the sendReminder function)

c)   Change the line into a string (delimited by quotes) with the alternative email address, and end it with a comma. For example: 'test@email.com',

d)   Save the file and refresh the cache.

**When I click on Kinento → Order Reminders on System → Configuration I get a 404 error?**

Please log-out and log-in after installation of the module.

**The cronjob does not finish and remains in running state. What should I do?**

Edit the Include orders starting from field in the general settings of the module to a recent date, e.g. the beginning of 2014 (1388534400). Details are explained earlier on in this manual.

**Could you provide some more details on the cronjob?**

For the cronjob - to see if it is working or not - you can check the cron_schedule table. To see the entries of the table, you can browse through it using for example phpMyAdmin. In the table, you will see an overview of active cronjobs in Magento. If you see a lot, that means the cronjob is working, and most probably you will then also see a Kinento Reminders cronjob between the others. If the table is empty, the cronjob is not set-up yet.

The button on the top right (Send reminders now) of the Order Reminders grid does exactly what the cronjob does: if it does not send any emails by using the button manually, the cronjob will also not send anything. Using the buttons in the right side of the grid will always send out reminders, regardless of the options. You can thus see the cronjob as an automated tool which 'pushes' that particular button every X minutes/hours. If the button works fine manually, it will also work fine when the cronjob is working.

Setting up a cronjob is not specific to the Kinento module. Many Magento features (e.g. newsletters) will require a working cronjob. You can look on the internet how to set-up a cronjob. However, it may be different depending on your hosting. I suggest you search online for "your hosting provider + Magento + cron". If your hosting provider uses a standard piece of software (e.g. *cpanel*, *plesk*) you can search for that. The module itself is set-up fine for the cronjob, as long as it is running it will be automatically be added - you don't have to change anything to the module.

**Orders show up on the reminders grid, but no reminders are sent. What should I double-check?**

Follow the troubleshooting steps 3, 4, and 5 (see above). Also, double check the data shown. For example, in the picture below, double-check:

- Make sure the order status (Pending in this case) matches the order statuses you have chosen in the configuration panel.
- Make sure the payment type is as you expect (Prepaid or On account).
- Make sure the age indicated is what you expect (67 days in this case). This number should be higher than your reminder settings for this payment type.
- Make sure that this particular order is not Disabled (either manually or based on payment type).

| | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | 145000003 | Main Website Madison Island English | Apr 30, 2014 9:42:28 AM | Jay Smith | Jay Smith | $372.38 | Pending | Prepaid | 0 (age: 67) add 1 remove 1 reset to 0 | Enabled Disable notifications | Enabled (cashondelivery) | Force send reminder now |