Installation
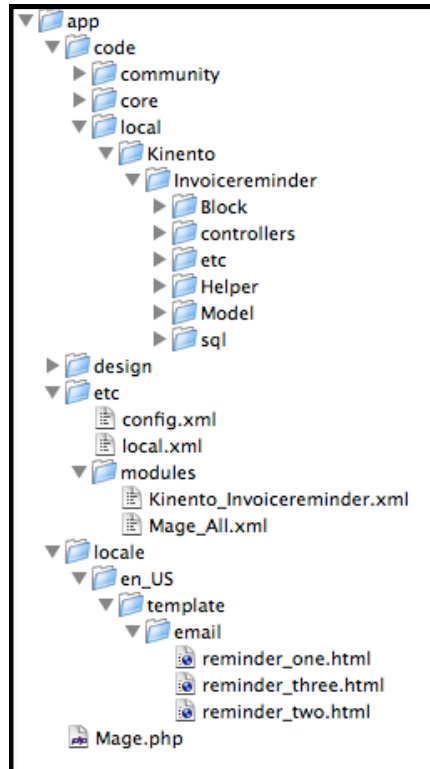
Installing the module

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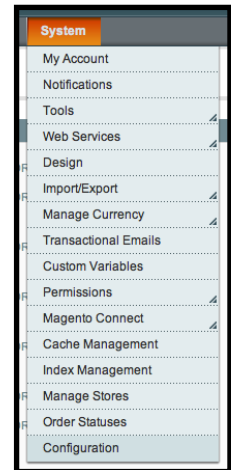

Please make sure that:

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

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

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

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 Invoice 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.

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 invoices 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 unixtimestamp.com). For example, the timestamp 1325397600 is equal to the first of January 2012.

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

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

General settings

| Include invoices starting from | 1257853617 |
| | ▲ input as a UNIX timestamp (see unixtimestamp.com) |

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

Include invoices with status
Pending
Paid
Canceled
Pending Payment

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 Invoices 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 Invoice Reminders grid

Accessing the grid

Navigate to Sales → Invoice 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 invoices are old enough, payment methods are enabled, notifications are enabled, etc.

For each row (one invoice 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 invoices 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 invoices will in contrast not care about settings or the age of an invoice. 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).

	Order id	Invoice id ↑	Store	Invoice date	Billing name	Amount	Invoice state	Invoice type	Reminders sent	Disable notifications	Payment method	Manual reminders
Any ⬍			⬍	From: To:		From: To:	⬍					
☐	100000003	100000001	Main Website Main Store English	Jul 21, 2012 11:43:22 AM	Genevieve Kavanagh	€755.00	Pending Payment	Prepaid	2 add 1 remove 1 reset to 0	Enabled Disable notifications	Enabled (checkmo)	Force send reminder now
☐	100000005	100000003	Main Website Main Store English	Jul 22, 2012 12:34:07 PM	Joshua Calvert	€336.58	Pending Payment	Prepaid	1 add 1 remove 1 reset to 0	Enabled Disable notifications	Enabled (checkmo)	Force send reminder now

Pending invoices overview — Send reminders now

Page 1 of 1 pages | View 20 per page | Total 2 records found — Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected — Actions Submit

Troubleshooting

Before performing troubleshooting, open the files var/log/exception.log and var/log/system.log. In these files, search for the word Kinento.

If you have problems with the **Invoice 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* Invoice 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* Invoice 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 Invoice Reminders grid shows, but is empty, double check if you have invoices that match the Include invoices 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 invoices meet the criteria you set in the configuration options. Please double check this.

   b)   Please check under Sales → Invoice 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 → Invoice Reminders if the Invoice state and Invoice type match those in your settings.

   d)   Make sure that the invoices 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 (1/2)

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 Invoice 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 invoices are old enough, payment methods are enabled, notifications are enabled, etc.

b) The Force send reminder now button next to the individual invoices will in contrast not care about settings or the age of an invoice. 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 Invoice 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/Invoicereminder/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.

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.

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 Invoicereminders 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 Invoice 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.