



User Manual

Magento 2 Integration

Version

Current version of the extension is 1.0.0 and it is compatible with Magento 2.0.x and 2.1.x versions.

Overview

CleverReach Magento 2 Integration extension offers synchronization of your Magento 2 newsletter subscribers and customers with CleverReach subscription groups.

CleverReach email marketing tool (<http://www.cleverreach.de/>) allows you to create professional emails online, dispatch them reliably, track their success and manage receivers. CleverReach is equipped with a particularly user-friendly interface, which is used intuitively and does not require specialist knowledge.

Once set up, the extension will handle subscriptions and unsubscribe requests. Users can unsubscribe using either on Magento 2 or CleverReach.

CleverReach Magento 2 Integration will track users who have followed the links in your email campaign. When a user completes a purchase, the extension will quietly send basic order details back to your reporting dashboard in CleverReach. Therefore you will be able to analyse conversions which originated from your mailings.

Features

1. Synchronize Magento 2 shop with CleverReach email marketing tool
2. Manage email marketing campaigns from CleverReach email service platform
3. Manage future subscriptions with CleverReach in Magento 2

Installation

The CleverReach Magento 2 extension can be installed in a few minutes by going through the following steps:

Step 1: Download the extension

Step 2: Unzip the file in a temporary directory

Step 3: Upload it to your Magento installation root directory

Step 4: Disable the cache in admin panel under System >> Cache Management

Step 5: Enter the following in the command line (upgrade database):

```
php bin/magento setup:upgrade
```

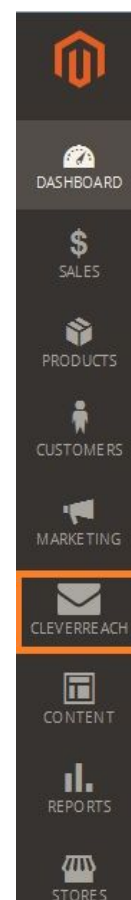
Step 6: Enter the following in the command line (deploy static content):

```
php bin/magento setup:static-content:deploy
```

Step 7: Optionally you might need to fix permissions on your Magento installation

Step 8: After opening Stores -> Configuration -> Advanced -> Advanced, the module will be shown in the admin panel

After the installation is complete, CleverReach configuration can be set by clicking on CleverReach icon on the main menu located on the left hand side of the screen. Please check the image shown on the right hand side of this page that illustrates the main menu in Magento 2.

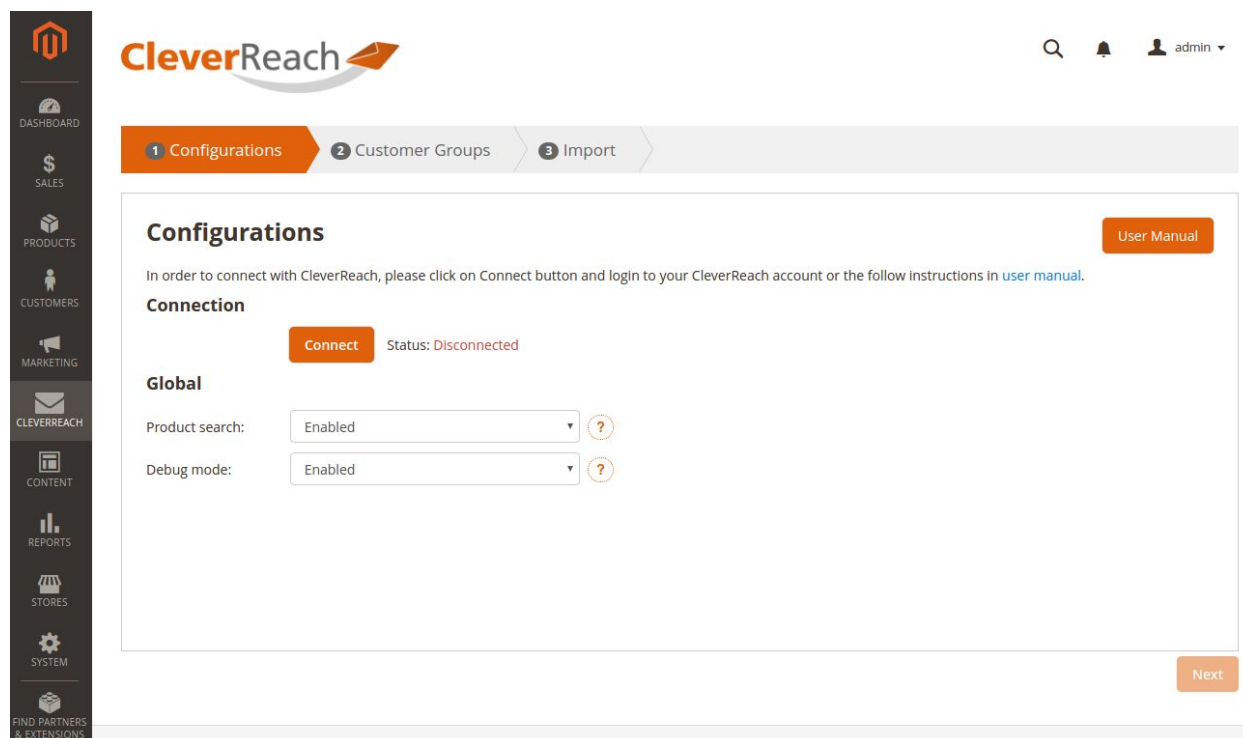


First use wizard

When the extension is launched for the first time, the configuration wizard will appear.

First step: Configurations

User can connect with CleverReach account by clicking on “Connect” button.



The screenshot shows the 'Configurations' step of the CleverReach extension setup wizard. On the left is a vertical sidebar with icons for Dashboard, Sales, Products, Customers, Marketing, CleverReach, Content, Reports, Stores, System, and Find Partners & Extensions. The main header features the CleverReach logo and a user profile 'admin'. Below the header is a progress bar with three steps: 1. Configurations (active), 2. Customer Groups, and 3. Import. The 'Configurations' section has a 'User Manual' button in the top right. A message states: 'In order to connect with CleverReach, please click on Connect button and login to your CleverReach account or the follow instructions in [user manual](#).' Under the 'Connection' heading, there is an orange 'Connect' button and a status indicator 'Status: Disconnected'. Below this, under the 'Global' heading, are two dropdown menus: 'Product search:' and 'Debug mode:', both currently set to 'Enabled'. Each dropdown has a help icon (a question mark in a circle). At the bottom right of the configuration area is a 'Next' button.

In order to connect Magento and CleverReach systems, enter your CleverReach credentials and click on the “Authorize” button to verify credentials. If credentials are correct, connection is successful and “Next” button is enabled.



"Magento 2" needs access to your CleverReach® account!

Magento 2

This application needs access to your CleverReach® data!

CleverReach® assumes no liability or responsibility caused by the use of applications from third parties. You are still connected to the CleverReach® service conditions for the authorization of an application

Customer ID

User name

Password

[I forgot my login details](#)

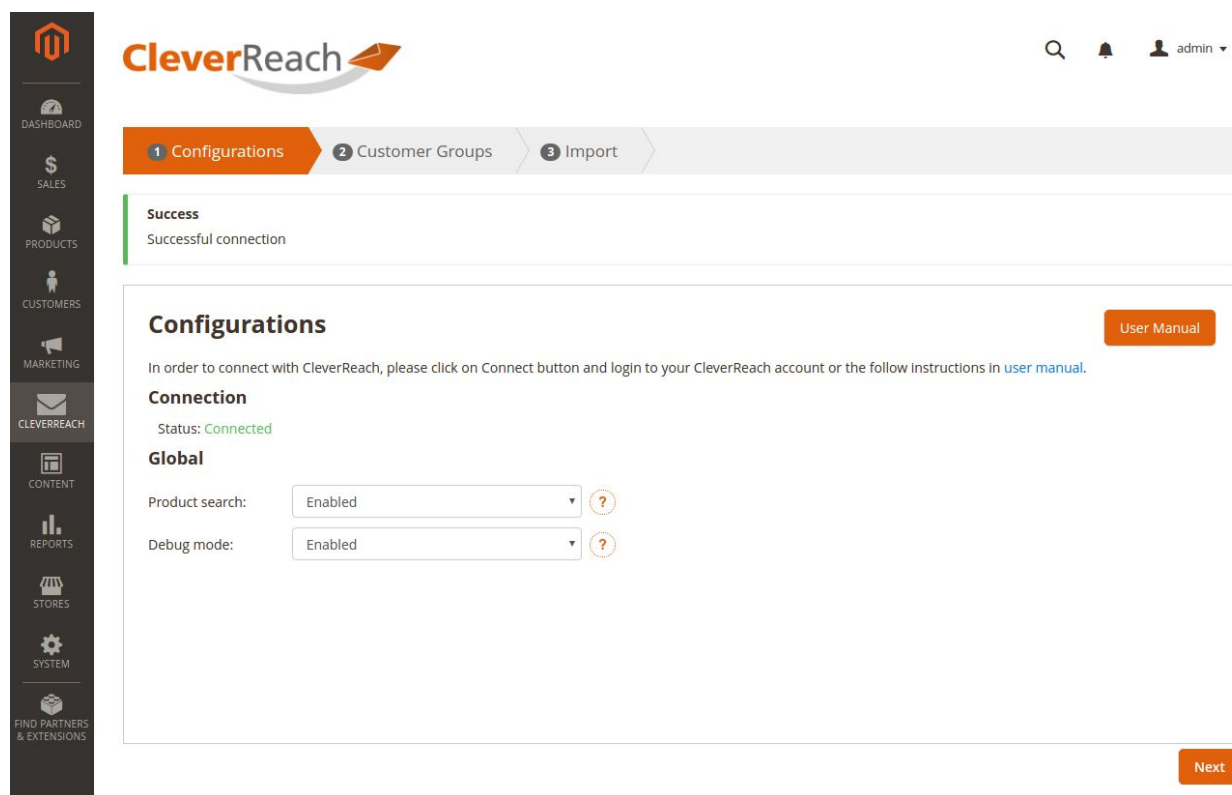
Authorize

No, thank you

You don't have a CleverReach account?

[Create an account](#)

Also, on this page the user can enable or disable **a product search feature**, which allows the user to search shop products from CleverReach, as well as **the debug mode**, which allows the system to log all user actions.



By clicking the “Next” button, the user moves to the second step in the installation process.

Second step: Customer Groups

At this stage, the user maps shop customer groups to existing CleverReach subscriber lists, and chooses an opt-in form for sending it as a subscription confirmation email, if necessary. If “None” option is selected for CleverReach subscriber list, the corresponding shop customer group will not be mapped to CleverReach. If “None” option is selected for opt-in form, a default shop email will be sent.

The screenshot shows the CleverReach Magento integration interface. The top navigation bar includes the CleverReach logo, a search icon, a notification bell, and a user profile labeled 'admin'. Below this is a progress bar with three steps: '1 Configurations', '2 Customer Groups' (the current step), and '3 Import'. The main content area is titled 'Customer Groups' and includes the instruction: 'Map your shop customer groups to CleverReach subscriber lists and choose a opt-in form.' Below this instruction is a table with three columns: 'Magento Customer Group', 'CleverReach Group', and 'Opt-in Form'. The table contains five rows of data. At the bottom of the table are two buttons: 'Previous' on the left and 'Next' on the right. A vertical sidebar on the left contains various navigation icons and labels: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CLEVERREACH, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS.

Magento Customer Group	CleverReach Group	Opt-in Form
NOT LOGGED IN	General	None
General	General	None
Wholesale	None	None
Retailer	None	None
Unregistered subscribers	None	None

The user can go back on the first step by clicking on “Previous” button, and move on the step three by clicking on the “Next” button.

Third step: Import

During the final step the user sets the batch size and the number of customers to be imported in CleverReach system per one request. This number must be an integer between 50 and 250. After that, the user can import customers by clicking on “Start import” button.

The screenshot displays the CleverReach dashboard interface. On the left is a vertical sidebar with icons for Dashboard, Sales, Products, Customers, Marketing, CleverReach, Content, Reports, Stores, System, and Find Partners & Extensions. The top header features the CleverReach logo, a search icon, a notification bell, and a user profile labeled 'admin'. A progress bar at the top indicates three steps: 1 Configurations, 2 Customer Groups, and 3 Import, with the third step being the active one. Below the progress bar, a green 'Success' message states 'Customers Imported successfully'. The main content area is titled 'Import' and shows a 'Batch size' input field with the value '100' and a help icon. A large orange progress bar below this indicates '100%' completion. At the bottom of the main area are two buttons: 'Previous' on the left and 'Start import' on the right.

CleverReach

1 Configurations 2 Customer Groups 3 Import

Success
Customers Imported successfully

Import

Batch size: ?

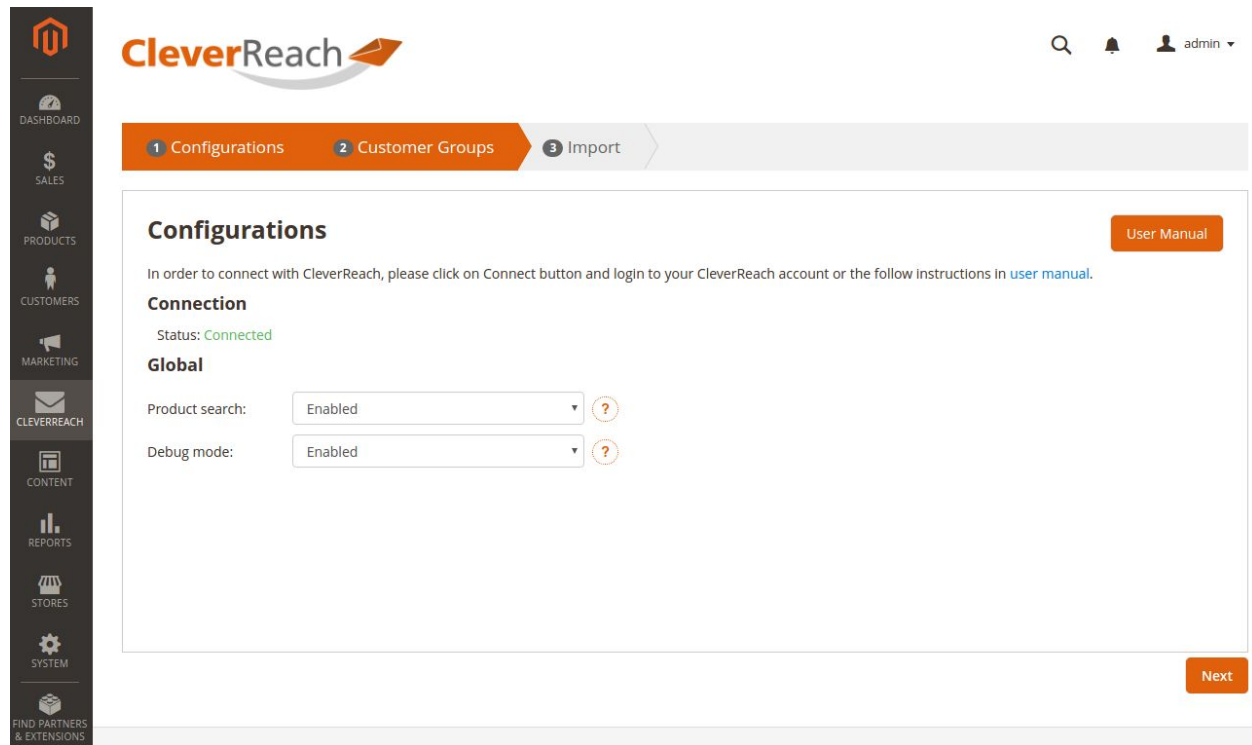
100%

Previous Start import

Completing the import, all configuration parameters are being set.

Changing configuration

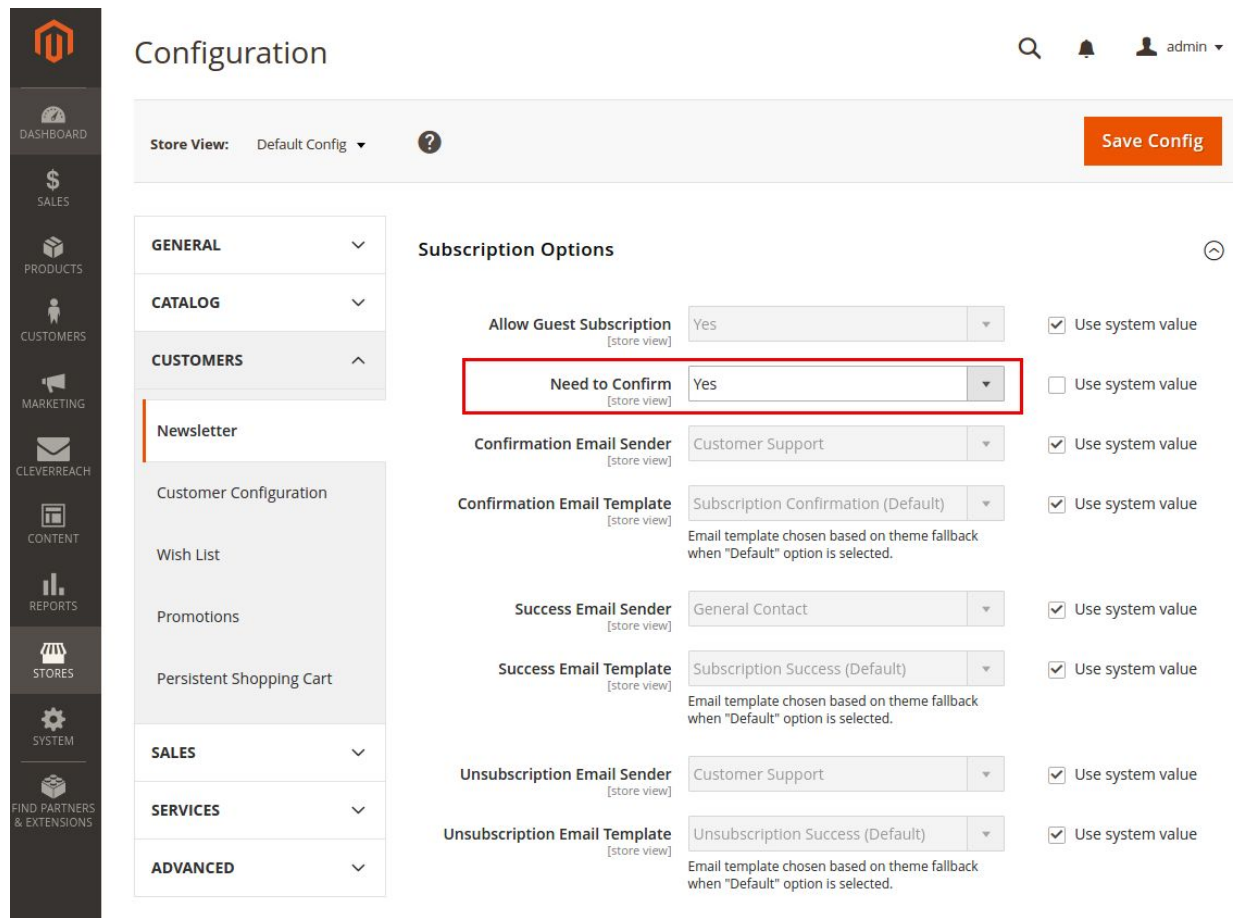
After the initial configuration setup in wizard mode, user can change any configuration parameters in a tab mode.



Enable double opt-in

To enable double opt-in process for each subscriber, navigate to:

Stores -> Settings -> Configurations -> Customers -> Newsletter -> Need to confirm



The screenshot shows the Magento 2 Configuration interface. On the left is a sidebar with navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CLEVERREACH, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main header is 'Configuration' with a search icon, a notification bell, and a user profile 'admin'. Below the header, there's a 'Store View' dropdown set to 'Default Config' and a 'Save Config' button. The left sidebar has a 'CUSTOMERS' section expanded, showing 'Newsletter', 'Customer Configuration', 'Wish List', 'Promotions', and 'Persistent Shopping Cart'. The main content area is titled 'Subscription Options' and contains several settings:

- Allow Guest Subscription**: Set to 'Yes' (store view), with a checked 'Use system value' checkbox.
- Need to Confirm**: Set to 'Yes' (store view), highlighted with a red box, with an unchecked 'Use system value' checkbox.
- Confirmation Email Sender**: Set to 'Customer Support' (store view), with a checked 'Use system value' checkbox.
- Confirmation Email Template**: Set to 'Subscription Confirmation (Default)' (store view), with a checked 'Use system value' checkbox. A note below states: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Success Email Sender**: Set to 'General Contact' (store view), with a checked 'Use system value' checkbox.
- Success Email Template**: Set to 'Subscription Success (Default)' (store view), with a checked 'Use system value' checkbox. A note below states: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Unsubscription Email Sender**: Set to 'Customer Support' (store view), with a checked 'Use system value' checkbox.
- Unsubscription Email Template**: Set to 'Unsubscription Success (Default)' (store view), with a checked 'Use system value' checkbox. A note below states: 'Email template chosen based on theme fallback when "Default" option is selected.'

If “Need to Confirm” value is set to Yes, each subscriber need to verify subscription to newsletter, otherwise subscriber will be subscribed automatically. More info about double-opt in process can be found on following [link](#).

Product search and order tracking

To measure the conversion through Magento 2 extension user need to activate the “Connect link extension” within emails on CleverReach system. More information about connect link extension can be found on following [link](#).

Test Lists > **Settings** > Template > Content > Confirm < >

Tracking

- ☒ **Track opens**
Figure out how many recipients opened your email (only possible in HTML format).
- ☒ **Track clicks** Paid accounts only
Figure out how often each link was clicked on.

Tracking URL ⓘ

- ☐ **Google Analytics Tracking**
Evaluate the performance of your campaign with Google Analytics (tag identification)
- ☐ **IntelliAd Tracking** ⓘ
- ☒ **Connect link extension** ⓘ

Options

Which unsubscribe form would you like to use? ⓘ

ⓘ

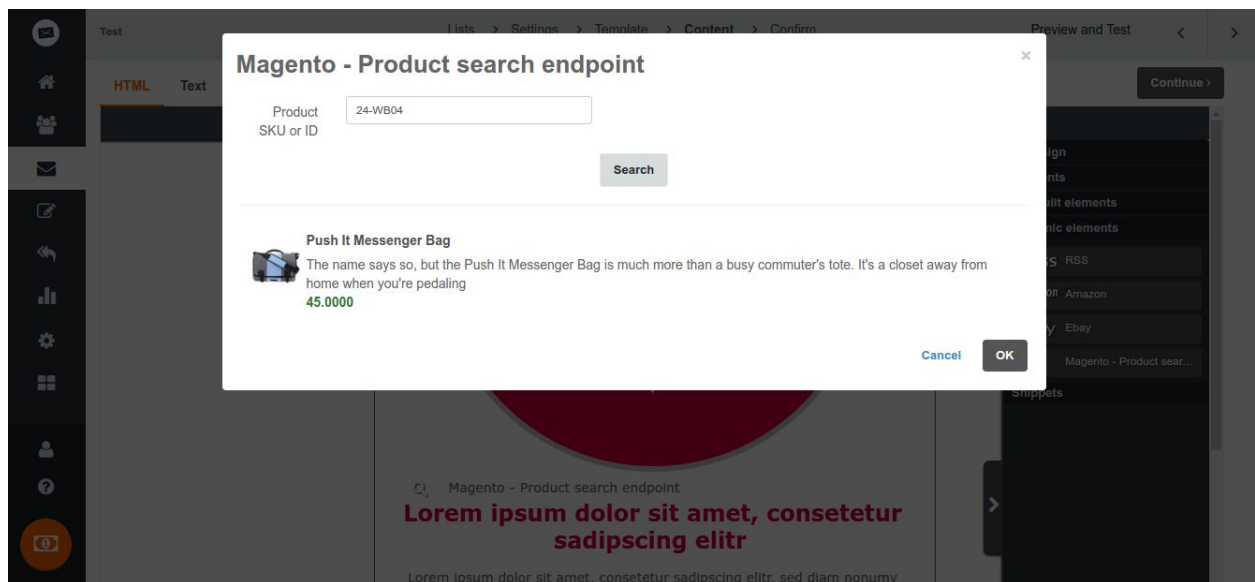
- ☒ **Online Version**
An online version of your campaign can be seen in the browser via a link.
- ☒ **Online-Archiv**
Publish the email in the archive which can be integrated into your website.

Cancel and delete **Continue >**

Next, in order to connect your email campaign and products in your shop, go to content builder in CleverReach system and drag “Magento - Product search” to content of email.



Here user can search products from Magento shop by ID or SKU. After search is completed, user needs to confirm adding product to email content by clicking on button "OK"



Support

CleverReach Help Center: <http://support.cleverreach.de/hc/en-us>

Notes

Please note this document is created by Logecom, but not from professional copywriter.