Plugin Documentation

OXID CleverReach® Connector

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Because mistakes can be made despite all efforts, we would be grateful for any hints about improvement.

Conventions

In this document the following typographic conventions are used:

`Proportional font`
For user input, source code and URLs
Grey italic bold
For file names, paths and other italic mark-ups
Für Dateinamen und Pfade und sonstige kursive Auszeichnungen
Bold font
For input fields and navigation steps
Bold font dark red
For warnings and important hints

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Description of the module

OXID CleverReach Connector 4.1.0

This extension exports any relevant information quickly and easily from your OXID eShop to CleverReach. With help of this data you can now start targeted marketing.

This module can be downloaded from the OXID eXchange marketplace, part of the OXID esales website:

https://exchange.oxid-esales.com/

Your benefits

The exported data allows you to address exactly the right target groups you want to reach with your newsletters.

- With help of e-mail campaigns, you can generate more orders and sales
- Inform customers about news
- Extensive studies show the success in real time
- Talk to your customers personally

A CleverReach® Account is a requirement to use the module. You can create an account for free at: https://www.cleverreach.de/?rk=20438hvssgrhk

The following data can be transferred with this module:

Customer data:

- date of registration
- date of newsletter subscription
- company
- street
- town
- zip code
- country
- e-mail address
- form of address
- first name
- last name
- date of birth
- language
- confirmed by double opt-in?

Order data:

- ordering
- ordering date
- item code

- article name
- number of articles
- price

CleverReach Tracking:

- ordering
- price
- currency

Additional information

There are three options to export the data to CleverReach® with this module:

- **CSV export**
  The file gets saved into a folder on the webserver and you may then import it manually into your CleverReach® account.

- **cronjob**
  to automate the export of the data, the module provides a cronjob script that can be called in regular intervals. The script utilizes the CleverReach® REST-API. By using cronjobs your CleverReach® account will always stay synchronized with your OXID eShop. Only modified data will be transferred.

- **manually**
  you can also start the data export with a simple click in the admin interface. This will export all modified data since last export, or you can choose to create a full export.

Another feature is the configurable language and country mapping. With help of this it is possible to assign customers, who have not stored their address, to a country and a language, based on their e-mail address. An easy to understand guide on how you can customize the mapping feature is located in the module as well.

Security Advice

We recommend for your own safety to create a backup, both of your shop files as of your MySQL-database, before starting the installation, so you preserve the opportunity to rollback all your changes.

Hint: Best-practise is to prepare the installation including all necessary template changes on a stage-system first, before altering your productive system.

System Requirements

This manual describes a fresh installation of the CleverReach® Connectors for the OXID eShop Community, Professional and Enterprise Edition from version 6.0.0.

Do not install this module, if you are using a different OXID eShop version!

The connection oft he OXID eShop module with CleverReach® only works, if SSL has been activated in the shop. In the config.inc.php the setting `$this->sSSLShopURL` must contain the corresponding SSL URL of the shop. Missing SSL support will cause the following error message when trying to connect:

```
{"error":"invalid_client","error_description":"No client id supplied"}
```

Step-by-step module installation

1. Edit your composer.json

OXID6 uses composer for installation.

Add the following line to the central composer.json file of your project:
In the „require“ section:

```
"topconcepts/oxid-cleverreach-6":"v4.1.0"
```

and run the following command on your console:

```
composer update
```

or alternatively simply run:

```
composer require topconcepts/oxid-cleverreach-6:v4.1.0
```

2. file permissions

In the main shop directory a folder "tc_export" will be created. Please set sufficient file rights so webserver can write into it, if necessary. You should prevent external users from downloading files from this location by setting up a password protection or IP restriction using a .htaccess file.

We recommend creating the folder tc_export above the document root folder, to avoid public access.

3. /tmp folder

Please delete all files from the /tmp folder of your shop.

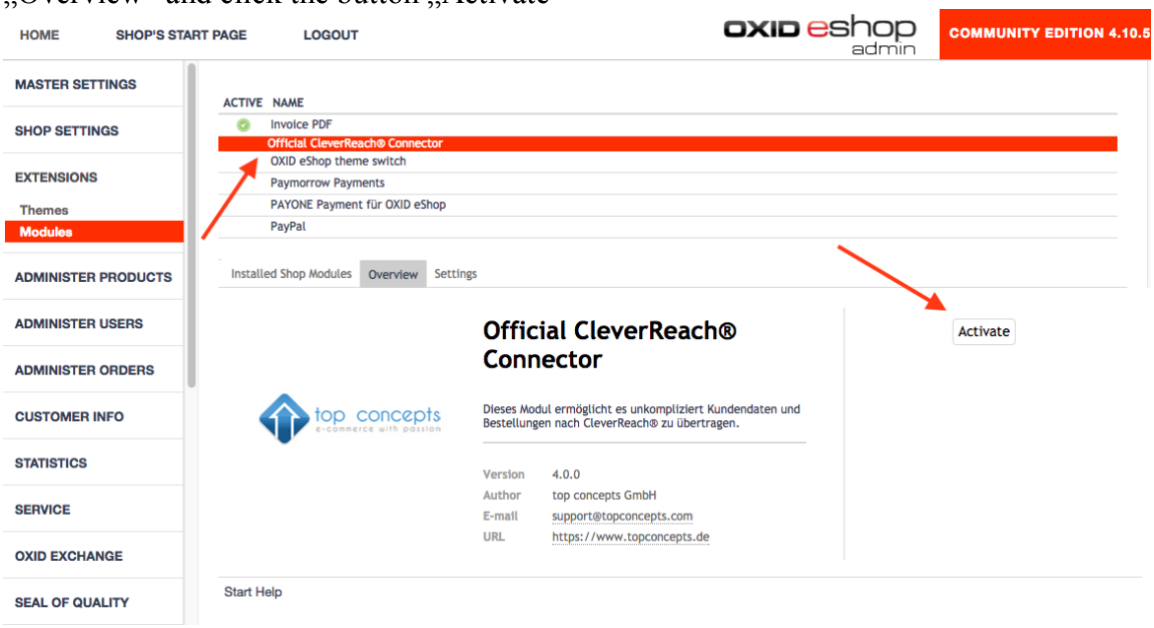
4. Please log in

Please log in to the OXID admin backend.

5. Activation of the module

Please perform the following steps:

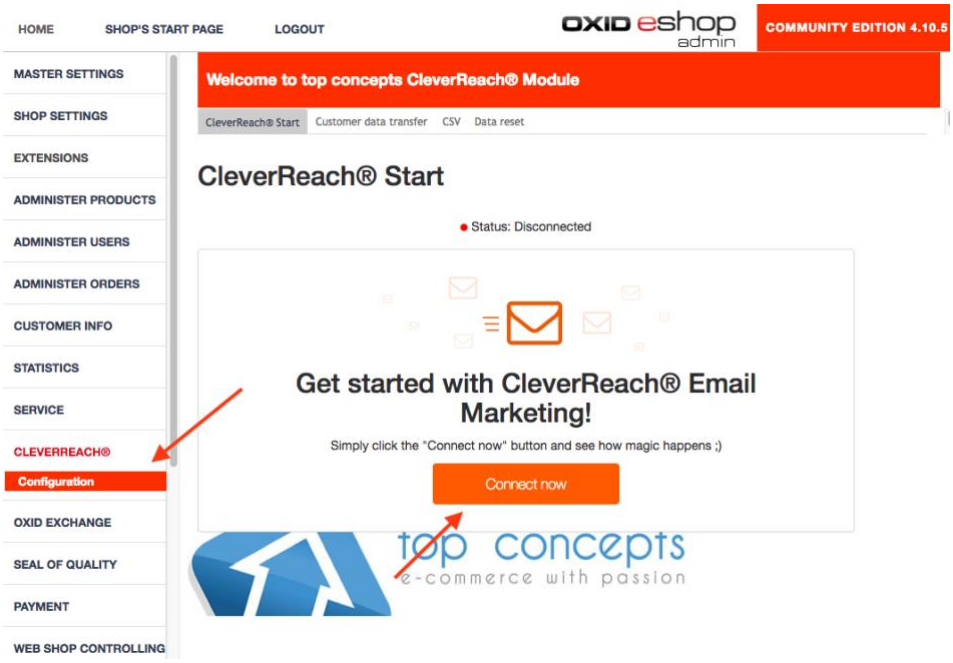
1. Go to „Extensions“ -> „Modules“ -> „Official CleverReach® Connector“ -> „Overview“ and click the button „Activate“



2. Please log off from the OXID admin backend (logout)
3. Please once more delete all files from the /tmp folder of your shop
4. Re-Login to the OXID admin backend

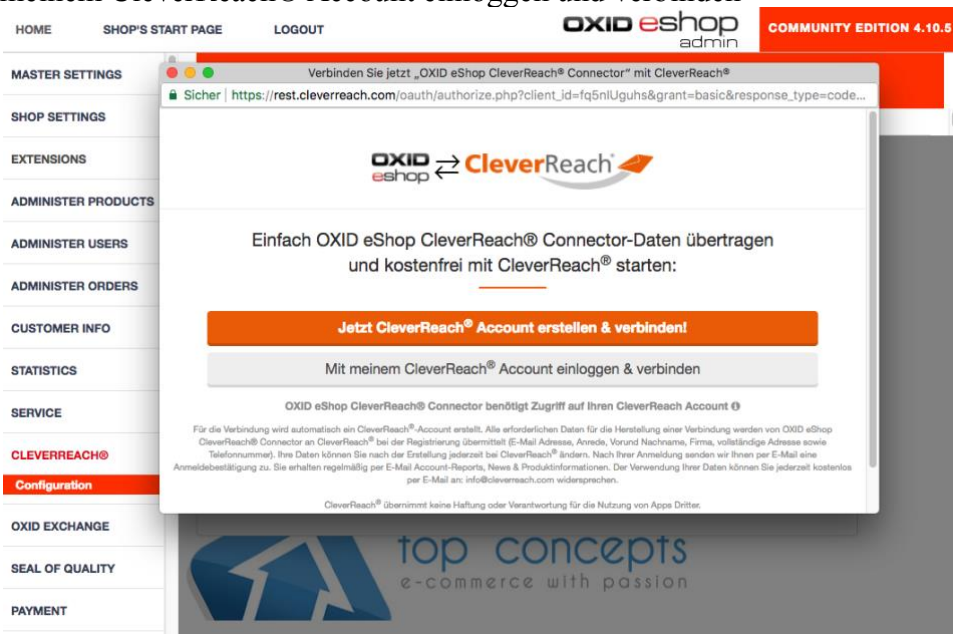
6. Connect your shop with CleverReach®

Back in the OXID admin backend open the new menu entry “CleverReach®” in the left sidebar and click “Configuration”.
To connect your shop with CleverReach® click the Button “Connect Now”



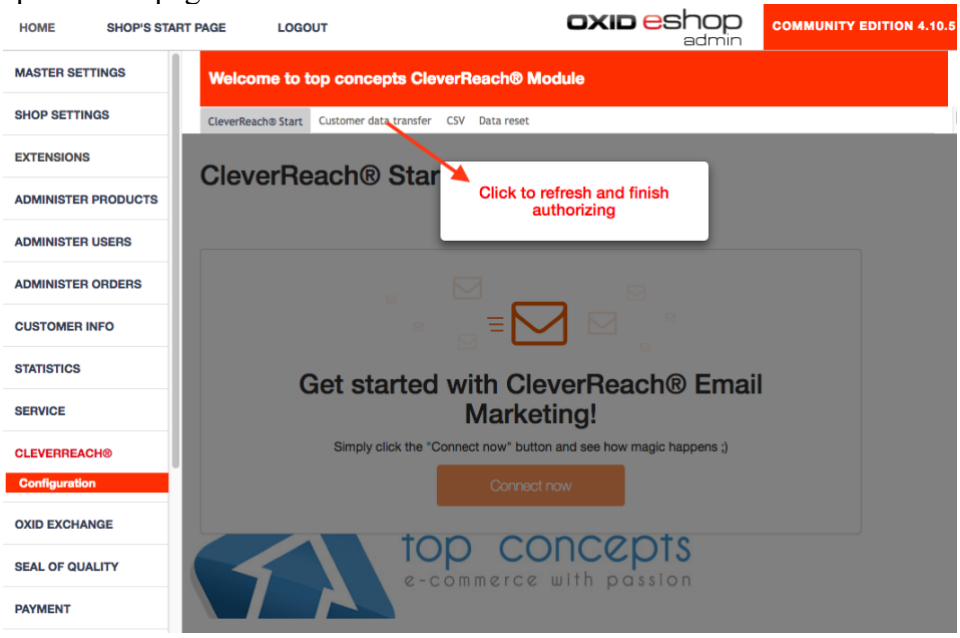
A popup window with 2 options opens.

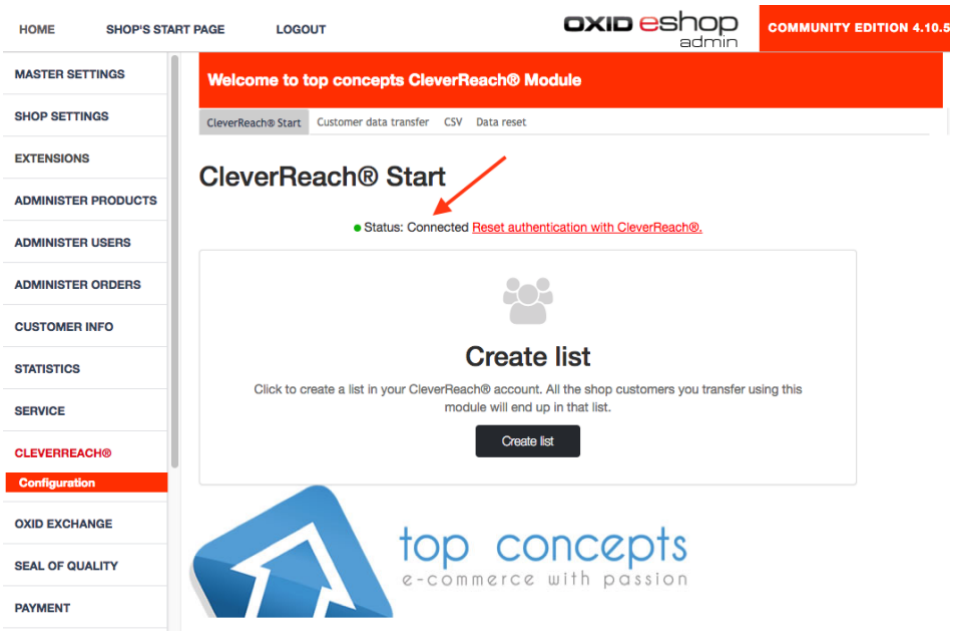
- „Jetzt CleverReach® Account erstellen & verbinden!“
- „Mit meinem CleverReach® Account einloggen und verbinden“



Choose your appropriate option, fill out the particular form and follow the instructions in the popup window until the connection is established and the popup window closes automatically.

Now click the button “Click to refresh and finish authorizing” in the OXID admin backend, to reload the shop backend page and finish the authentication.



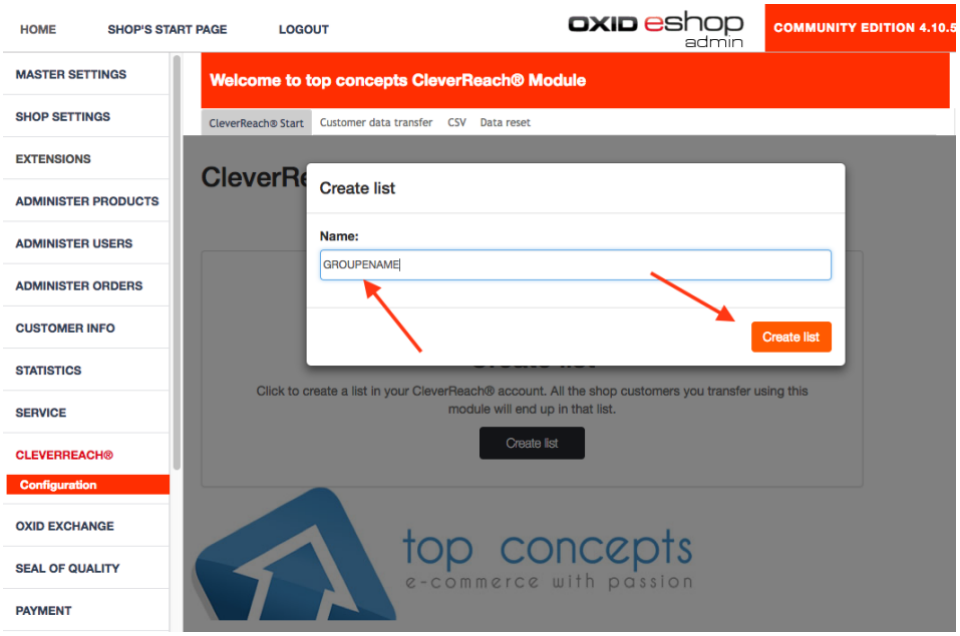


Your shop is connected with CleverReach® now.

Note: If no popup window opens, check your browser settings (e.g. popup blocker)

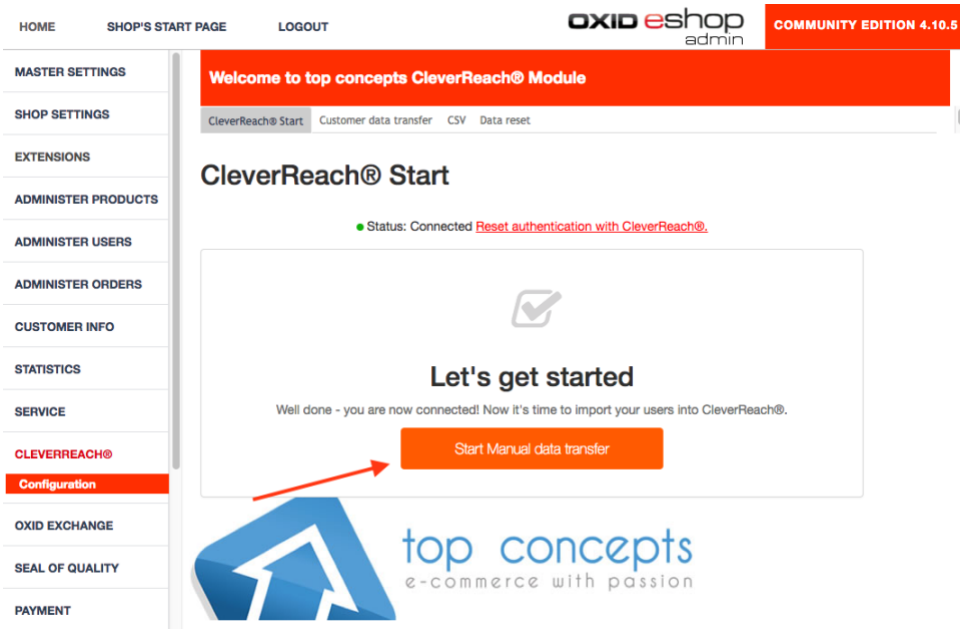
7. Create a CleverReach® list

At CleverReach® user data are managed in lists.
Click the button “Create list”.
Enter a name for the new list in the input field that opens and click the button “Create list” to create the list. You can also choose to use an existing recipient list.



8. Transfer data

To transfer the user data manually to your CleverReach® account you can now click the button „Start Manual data transfer“.



Alternatively, you can setup a cronjob for the automatic data transfer or create a CSV file to be imported via the CleverReach® backend.

9. Done

Congratulations! The installation is now completed.

Assign e-mail addresses to a specific country/language

This module has the ability to assign customers based on their e-mail address to a country and a language.
For the following top-level domains (e-mail address ending) an assignment is stored already:

ae, al, at, au, ch, cz, de, dk, es, fi, fr, gr, hr, hu, it, lt, lv, nl, no, pl, pt, ro, ru, ua, uk, us, se, si, sk, tr

Default language is English.
If you need more mappings or want to change the existing one, you can do so in the "config.inc.php".
For this, the following code will be added to the end of the file, and then adapted to their own needs.

```
// tc_cleverreach
$this->tc_cleverreach_tldmapping = array(
// tld  => language-short, iso2
'dk' => array('lg' => 'da', 'iso2' => 'dk'),
);
```

New entries can be added as follows:
'dk' => array('lg' => 'da', 'iso2' => 'dk'),

The values 'dk', 'da' and 'dk' can be replaced:
'dk' → top Level Domain (TLD) of the e-mail address
'da' → language code (ISO 639-1)
'dk' → country code (ISO 3166-1 ALPHA-2)

The language code is the language of the customer and the country code indicates the country in which the customer lives.

Examples

```
        'de' => array('lg' => 'de', 'iso2' => 'de'),
//      de → Deutschland (Germany) (Domain)
//      de → Deutsch (language) (German)
//      de → Deutschland (Germany) (country)

        'dk' => array('lg' => 'da', 'iso2' => 'dk'),
//      dk → Dänemark (Denmark) (Domain)
//      da → Dänisch (danish) (Sprache)
//      dk → Dänemark (Denmark) (Land)


        'at' => array('lg' => 'de', 'iso2' => 'at'),
//      at → Österreich (Austria) (Domain)
//      de → Deutsch (German) (language)
//      at → Österreich (Austria) (country)

        'uk' => array('lg' => 'en', 'iso2' => 'gb'),
//      uk → Vereinigtes Königreich (United Kingdom) (Domain)
```

```
//      en → Englisch (language)
//      gb → Großbritannien (Great Brittain) (country)

        'com' => array('lg' => 'en', 'iso2' => 'us'),
//      com → commercial (Domain)
//      en → Englisch (language)
//      us → USA (country)
```

It is also possible, to set a default value. This will be used whenever no value is found for the domain.
It can be set up just like the normal assignments.
In this example, the default setting says that any e-mail with an unknown TLD is associated to a german customer with german language:

```
        'default' => array('lg' => 'de', 'iso2' =>'de'),
//      default → default (do not change!)
//      de → Deutsch (language)
//      de → Deutschland (country)
```

Custom fields

This module supports multiple custom fields in CleverReach. If you wish to use these fields, you have to create the custom field in your CleverReach® Account first.
It is important to name the fields exactly like mentioned below.

```
birthday
shop
double_opt_in
language
```

```
birthday        → date of birth
shop            → customer's shop
double_opt_in → Has the customer confirmed the newsletter via double opt-in
language        → language code
```

Very important:

You MUST use the OXID unsubscribe function.
The default unsubscribe link of CleverReach® will not provide the unsubscribing to the OXID shop and the next data transfer will activate the e-mail address again.
Therefor you have to add the following link to all your CleverReach® templates:

https://[WWW.YOURSHOP.COM]/index.php?cl=newsletter&fnc=removeme&email={EMAIL}

Replace *[WWW.YOURSHOP.COM]* with your shop domain.
Do **NOT** replace *{EMAIL}*! This is the placeholder for the newsletter templates and will be automatically replaced by CleverReach®.

Information

Before the first export, you should use the CSV export feature, if you have more than 50.000 customers in the user-table (oxuser) of your OXID eShop.
This ensures that all customers and orders are written to a CSV file,
which you can then import into CleverReach (it is the fastest solution for a large customer base)

To use the CSV export, either call the file "crons/tc_cleverreach_cronjob.php csv"
or click "Einstellungen/Settings → CSV Datei Erstellen/ Create CSV file" in the OXID admin.

After this first export you can also use the automatic transfer function.
You can either use the comfortable cronjob or the manual export via OXID admin (CleverReach → Settings).

Cronjobs

The cronjob file is located in the "crons" folder.
You should set up the cron job so that the file "tc_cleverreach_cronjob.php"
is called in 5 minutes intervals.
The operating account should be the user of the webserver or be in the same group.

tc_cleverreach_cronjob.php → Transfer using REST API
tc_cleverreach_cronjob.php csv → Export as CSV

Per default only recipient data will be transferred.
Add parameter “orders” to export order information too.

Why don't mutated vowels (umlaut) get transferred correctly?

This problem is caused by a misconfigured shop. The shop must be set to utf-8 right from the beginning. When someone changes the utf-8 mode in the config.inc.php but forgets to also convert the database to utf-8, this problem will probably occur.
This could even break the encoding of other modules.
So be sure to always convert the tables to utf-8 when setting the utf-8 mode in the config file.

„Dateipfad ist falsch“ (Filepath is wrong)

This error message will show when the cronjob file cannot find the OXID shop. You can resolve this by just changing the data path in the cronjob file to an existing shop path.

„Bearbeiten der CSV nicht möglich“(Editing of csv file not possible)

This error occurs when the user executing the cronjob doesn't have sufficient rights to create or modify the csv file.

When will newsletter unsubscriptions be transmitted to CleverReach® ?

Newsletter unsubscriptions are initially stored in OXID eShop in the database. Therefore, it is essential to avoid lawsuits that you perform a data synchronization before sending a newsletter. If you have activated the cronjob, the synchronization will be carried out automatically on a regular basis. However, if you are working without cronjob, you must trigger the manual data transfer via the OXID Admin in the CleverReach® module in order to transfer all deregistrations collected in OXID eShop to CleverReach® before sending the newsletter.

Questions and Problems

If you have any questions or problems, feel free to contact our support at:

E-Mail: support@topconcepts.com

To be able to react to your questions as fast as possible you should add information about the shop environment you are using, including: Oxid version (e.g. OXID CE 4.10.1), version of the CleverReach® Connector module and the PHP version.
For advanced support or debugging we need access-data to your shop admin interface, FTP- or SSH-access and also access to the database (e.g. via phpMyAdmin).
Our support is not free and is charged with 39,00 € net 15 minutes, if you do not have other support agreement with us or have agreed a fixed price.