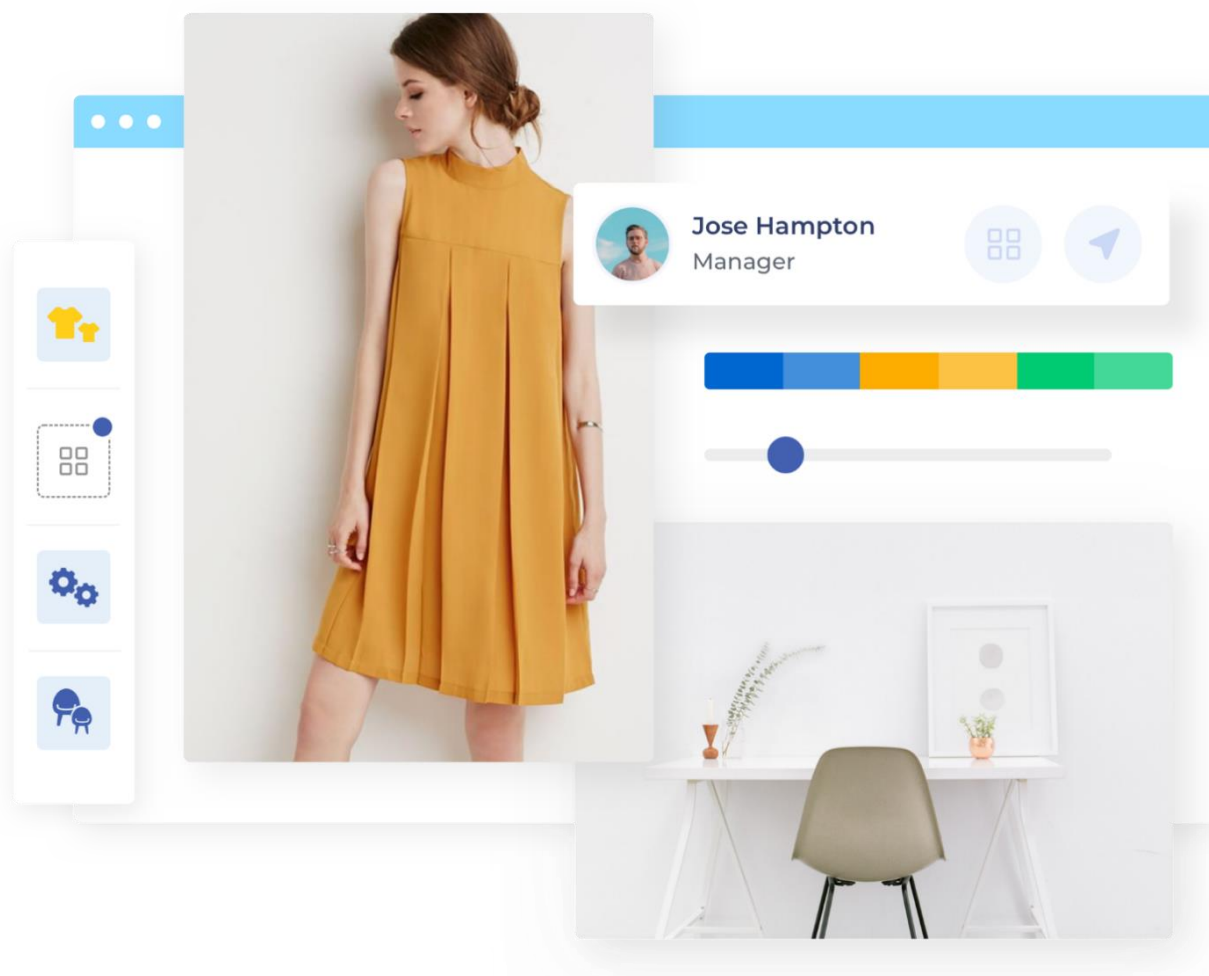


**WHITE PAPER**

ABANDONED CARTS HANDLING

This document contains information about the abandoned carts functionality in TRIMIT B2C webshop for Business Central BC13 R2.

Date: 11-08-2020

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INTRODUCTION

Abandoned carts functionality allows sending notification emails to registered users if they have left items in a basket on TRIMIT B2C webshop. Basket is persisted for guests based on cookies in last browser used or when logged in for authenticated users.

The functionality described is the functionality in **TRIMIT for Business Central BC13 R2**.

The pictures in this White Paper are based on the demo database for **TRIMIT Business Central W1 BC13 R2**, which is based on Microsoft Dynamics 365 Business Central on premises 2019 release wave 2 (October release), in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

SETUP

B2C webshop soft admin has 2 pages: **Send out “Abandoned cart”-mails** and **Email Configuration**.

Send out “Abandoned Cart”-mails page has two sections: **Abandoned cart emails** (sets up sending emails) and **Abandoned cart clean-up** (cleaning up for older carts (baskets)).

Email Configuration page sets up the email notification template details and required paths which will be used in the notification email, so that customer can use them to navigate directly to the webshop.

More setup details are described below.

SEND OUT “ABANDONED CART”-MAILS

This soft admin page has two sections: **Abandoned cart emails** and **Abandoned cart clean-up**.

Send out "Abandoned cart"-emails

To set up CRON for this, please visit Modelyn Admin and edit /pir/systempages/on-server-start/init-schedules.html, then request that page manually, or reboot your Modelyn instance
Hover to see options

Abandoned cart emails

Send email?
☒

Send email after how many days?

Abandoned cart clean-up

Do clean-up?
☒

Number of days before clean-up

ABANDONED CART EMAILS

DESCRIPTION OF THE FIELDS

SEND EMAIL?

Activates sending emails to abandoned cart owners

SEND EMAIL AFTER HOW MANY DAYS

Use slide bar to adjust after how many days the system should send reminder email notification to the abandoned cart owner.

ABANDONED CART CLEAN-UP

DESCRIPTION OF THE FIELDS

DO CLEAN-UP?

Enable the abandoned carts clean up functionality

NUMBER OF DAYS BEFORE CLEAN-UP

Use the slide bar to adjust after how many days the system should delete the abandoned carts.

EMAIL CONFIGURATION

This soft admin page has the following sections: **Basic settings**, **Styles**, **Font**, **Button** and **Paths**.

Email configuration

These settings are related to the schedules for called abandoned-carts-handling and not in stock-handling.

Hover to see options

Basic Settings

Email type

Advanced (document) ▼

Use queue?

☒

Styles

Max width (px)

300 400 500 600 700 800 900 1,000

Background color

Content background color

Cell padding (px)

BASIC SETTINGS

DESCRIPTION OF THE FIELDS

EMAIL TYPE

Select from the following options: *Simple (macros)* and *Advanced (document)*.

If option *Simple (macros)* is selected, then the notification email will be based on macro text.

If option *Advanced (document)* is selected, then the notification email will be based on the email template.

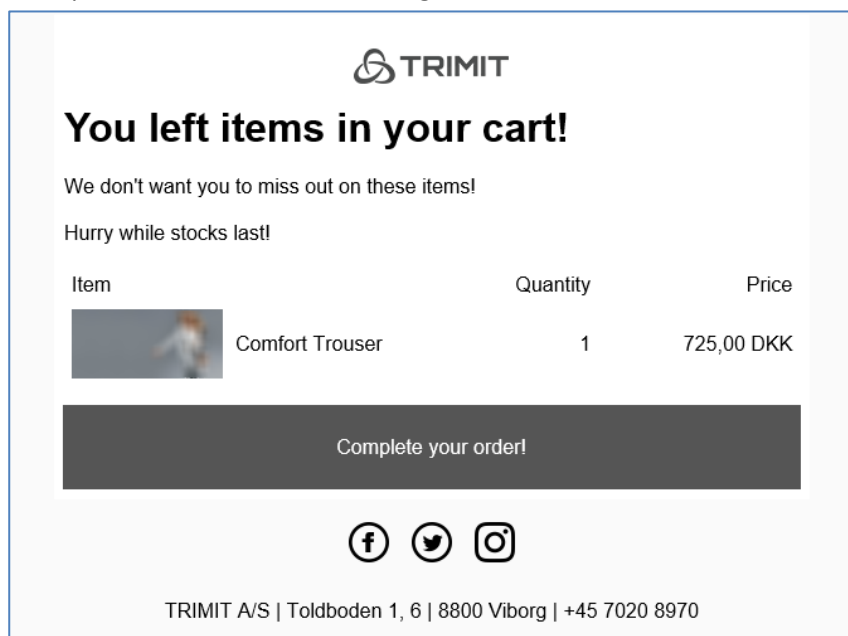
The template can be found in Modelyn admin under: *Content/Content Structure/(Portals)/B2C/System Pages/Content/EmailTemplates/abandoned-cart-email*.

USE QUEUE?

When enabled then the emails to be sent are queued for sending in Modelyn admin under: *System/Communication/Email Queue/Queued*.

Settings on this page will become valid if **Email type** is set to *Advanced (document)* on **Email Configuration** page in B2C soft admin. Setting on this page allow make changes to email template for abandoned cart user notification.

Example of the actual email message:



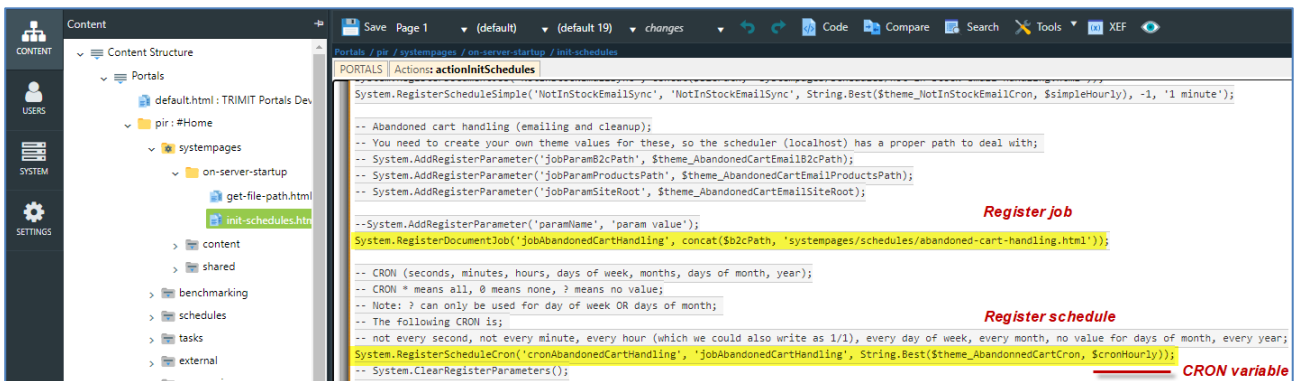
It is important to fill in a **Path** section on **Email configuration** soft admin page. A short description with examples can be found in the section itself:

Paths

Fully qualified paths with preceding protocol are required in order to properly reference resources from within the mails, so e.g. `https://your-site.com` (no trailing slash '/'), `https://your-site.com/b2c/` (with trailing slash '/') & `https://your-site.com/pir/products/` (with trailing slash '/')

SCHEDULE

The related schedule job is called ***“jobAbandonedCartHandling”*** and the schedule is called ***“cronAbandonedCartHandling”***. By default, the schedule is set to run every hour, but this can be changed. The schedule related information can be found under ***Content/Content Structure/(Portals)/pir/systempages/on-server-startup/init-schedules***. Open **Code** to see the content.



```

System.RegisterScheduleSimple('NotInStockEmailSync', 'NotInStockEmailSync', String.Best($theme_NotInStockEmailCron, $simpleHourly), -1, '1 minute');

-- Abandoned cart handling (emailing and cleanup);
-- You need to create your own theme values for these, so the scheduler (localhost) has a proper path to deal with;
-- System.AddRegisterParameter('jobParamB2cPath', $theme_AbandonedCartEmailB2cPath);
-- System.AddRegisterParameter('jobParamProductsPath', $theme_AbandonedCartEmailProductsPath);
-- System.AddRegisterParameter('jobParamSiteRoot', $theme_AbandonedCartEmailSiteRoot);

--System.AddRegisterParameter('paramName', 'param value');
System.RegisterDocumentJob('jobAbandonedCartHandling', concat($b2cPath, 'systempages/schedules/abandoned-cart-handling.html'));

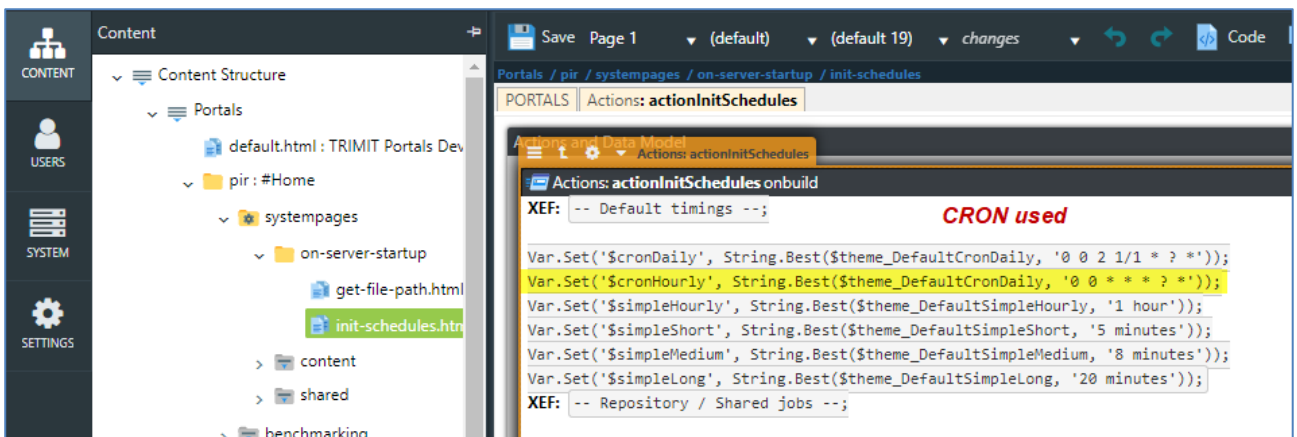
-- CRON (seconds, minutes, hours, days of week, months, days of month, year);
-- CRON * means all, 0 means none, ? means no value;
-- Note: ? can only be used for day of week OR days of month;
-- The following CRON is;
-- not every second, not every minute, every hour (which we could also write as 1/1), every day of week, every month, no value for days of month, every year;
System.RegisterScheduleCron('cronAbandonedCartHandling', 'jobAbandonedCartHandling', String.Best($theme_AbandonedCartCron, $cronHourly));
-- System.ClearRegisterParameters();
  
```

Register job

Register schedule

CRON variable

CRON variable and definition used, in this case hourly, but can be changed to e.g. ***\$cronDaily***:



```

Var.Set('$cronDaily', String.Best($theme_DefaultCronDaily, '0 0 2 1 * ? *'));
Var.Set('$cronHourly', String.Best($theme_DefaultCronDaily, '0 0 * * * ? *'));
Var.Set('$simpleHourly', String.Best($theme_DefaultSimpleHourly, '1 hour'));
Var.Set('$simpleShort', String.Best($theme_DefaultSimpleShort, '5 minutes'));
Var.Set('$simpleMedium', String.Best($theme_DefaultSimpleMedium, '8 minutes'));
Var.Set('$simpleLong', String.Best($theme_DefaultSimpleLong, '20 minutes'));
XEF: -- Repository / Shared jobs --;
  
```

CRON used

NOTE:

Schedule change should only be done on **custom-init** page under *Content/Content Structure/(Portals)/pir/schedules/custom-init.html*. Read more in White Paper – TRIMIT Portals Schedules.

If a registered user logs in to B2C webshop and adds an item to basket, then a record will be created in **CustomData** table in group *TRM-BASKETS*. Column *String1* in this group contains user's email address.

If the schedule is enabled and Abandoned Carts functionality is turned on, then the schedule CRON will send a notification email to all authenticated basket owners.

It is possible to adjust after how many days the notification email should be sent and after how many days the basket record should be deleted from the Modelyn database. Description can be found in section **Setup** in this document.

THEME VALUES

The following theme values duplicate the mentioned above soft admin settings.

However, theme value **AbandonedCartEmailFromAddress** should contain a sender email address filled in the following way. E.g.:

Portals [<info@mysite.com>](mailto:info@mysite.com);

Where:

Portals - is a free text

< - stands for open bracket <

> - stands for close bracket >

[Info@mysite.com](mailto:info@mysite.com) - is a sender email

Full theme value:

```
<value id="AbandonedCartEmailFromAddress">Portals <info@mysite.com></value>
```

The list of all related theme values:

```
<value id="AbandonedCartEmailDays">0</value>
<value id="AbandonedCartDoCleanUp">true</value>
<value id="AbandonedCartCleanUpDays">5</value>
<value id="AbandonedCartDoSendEmail">true</value>
<value id="AbandonedCartEmailType">document</value>
<value id="AbandonedCartEmailShowTitle">false</value>
<value id="AbandonedCartEmailUseQueue">true</value>
<value id="AbandonedCartEmailFromAddress">Portals <info@mysite.com></value>
<value id="AbandonedCartEmailMaxWidth">600</value>
<value id="AbandonedCartEmailBgColor">#fafafa</value>
<value id="AbandonedCartEmailContentBgColor">#ffffff</value>
```

```
<value id="AbandonedCartEmailFooterBgColor">#fafafa</value>
<value id="AbandonedCartEmailGoogleFontFamily">Roboto Condensed</value>
<value id="AbandonedCartEmailButtonFontColor">#ffffff</value>

<value id="AbandonedCartEmailCellPadding">10</value>
<value id="AbandonedCartEmailAlign" />
<value id="AbandonedCartEmailBasketImageWidth" />
<value id="AbandonedCartEmailFontType" />
<value id="AbandonedCartEmailFontSize" />
<value id="AbandonedCartEmailButtonBgColor" />
<value id="AbandonedCartEmailButtonPadding" />
```

ANONYMOUS B2C SESSIONS

Baskets for anonymous users will also be reflected in TRM-BASKETS group, but without user's email address. If anonymous user reopens browser tab with B2C webshop the basket value will persist based on browser cookies. After deleting browser cookies, the basket value for anonymous user will be reset. All basket records in CustomData group TRM-BASKETS for both authenticated and anonymous users will be deleted according to settings in the soft admin (***Abandoned cart clean-up***).

TESTING

Note that for testing purposes – ***Send email in how many days*** should be set to 0, otherwise if it is set to e.g. 2, then baskets which were modified for two days ago will be sent email to only.

For testing email delivery – it is possible to set test email in a theme value and test that email is sent/received. But the test email address in the theme value should match the email of a B2C customer who has item in the basket. The theme value is as follows:

```
<value id="TestEmail">admin@trimit.com</value>
```

Test Note that a list of all sent email can be found in Modelyn under *System/Communication/Email Queue/Success*.