

Birthday Coupon for Magento 1 User Guide

Introduction

There are several ways to improve your clients' loyalty. One of the best is a discount. With Birthday Coupon extension you can automatically send discounts to birthday persons giving them a great reason to return to your store.

Specify the exact period when the coupon should be sent along with discount amount and expire date and the coupon is ready. With this extension you will show your clients how you care about them.

There is also [Birthday Coupon for Magento 2](#) in our store.

Magento Compatibility:

Community Edition: 1.8.x, 1.9.x

Enterprise Edition: 1.13.x, 1.14.x.1.x

If you experience any issues with the installation, please contact us.

Installation

To install NEKLO extension for Magento 1, you need to have FTP/SSH access details.

Attention! It is vital to disable code compilation before installing the extension. If this setting is left enabled, the extension installation can make your site inaccessible.

To disable code compilation, go to your **admin panel > System > Tools > Compilation** and click "Disable"

This is a demo store. Any orders placed through this store will not be honored or fulfilled.

Magento Admin Panel

Global Record Search Logged in as admin | Thursday, April 5, 2018 | Log Out

Dashboard Sales Catalog Customers Promotions Newsletter CMS Reports **System** [Get help for this page](#)

Compilation

Compilation State

Compiler Status	Disabled
Compilation State	Not Compiled
Collected Files Count	0
Compiled Scopes Count	0
Scopes Compilation Settings	default Mage_CatalogSearch_Helper_Data Mage_Catalog_Block_Navigation Mage_Catalog_Block_Product_Abstract Mage_Catalog_Helper_Data Mage_Catalog_Helper_Map Mage_Catalog_Helper_Product_Compare Mage_Catalog_Model_Abstract Mage_Catalog_Model_Category Mage_Catalog_Model_Session Mage_Checkout_Block_Cart_Abstract Mage_Checkout_Block_Cart_Sidebar Mage_Checkout_Block_Links Mage_Checkout_Helper_Cart
cms Mage_Page_Helper_Data	

My Account
Notifications
Tools
Web Services
Design
Import/Export
Manage Currency
Transactional Emails
Custom Variables
Permissions
Magento Connect
Cache Management
Neklo CachePro
Index Management
Manage Stores
Order Statuses
Configuration

Run Compilation Process

To Install the Extension:

1. Unpack a zip file you have downloaded.
2. Upload all files from the the zip file to the root folder of your Magento 1 installation.
3. In your admin panel, go to **System > Cache Management** and flush Magento cache.

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Cache Storage Management

[Flush Magento Cache](#) [Flush Cache Storage](#)

Select All | Unselect All | Select Visible | Unselect Visible | 8 items selected Actions | Refresh ▾ | Submit

Cache Type	Description	Associated Tags	Status
<input checked="" type="checkbox"/> Configuration	System(config.xml, local.xml) and modules configuration files(config.xml).	CONFIG	ENABLED
<input checked="" type="checkbox"/> Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	ENABLED
<input checked="" type="checkbox"/> Blocks HTML output	Page blocks HTML.	BLOCK_HTML	ENABLED
<input checked="" type="checkbox"/> Translations	Translation files.	TRANSLATE	ENABLED
<input checked="" type="checkbox"/> Collections Data	Collection data files.	COLLECTION_DATA	ENABLED
<input checked="" type="checkbox"/> EAV types and attributes	Entity types declaration cache.	EAV	ENABLED
<input checked="" type="checkbox"/> Web Services Configuration	Web Services definition files (api.xml).	CONFIG_API	ENABLED
<input checked="" type="checkbox"/> Web Services Configuration	Web Services definition files (api2.xml).	CONFIG_API2	ENABLED

4. Turn code compilation back on in **System > Tools > Compilation** after the extension was successfully installed.
5. Log out from Magento and login to reload ACL (account control level) rules.

Setting the coupon rules

At first you should set the new price rules for this extension. For this go to **Promotions → Shopping Cart Price Rules** and create auto generated price rules. Two options must be set:

1. **Coupon** should be **Specific Coupon**
2. In **Coupon Code** the **Use Auto Generation** must be on.

The rest is up to you.

Configuring the extension

To see the configurations of this extension, open **Admin Panel** and go to **System → Configuration → Neklo → Birthday Discount Coupon → General Settings**. Here you can adjust the extension:

1. **Is Enabled** turns the extension on and off.
2. **Associated sales regulates** the rules of the coupon. Set here the rules you have just created in **Promotions → Shopping Cart Price Rules**.
3. **Send email X days before birthday** sets the amount of days before the birthday, when the coupon will be sent. A negative number means the email will be sent after the birthday date

The screenshot shows the Magento Admin Panel interface. The top navigation bar includes links for Global Record Search, Log Out, and various system modules like Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System. The System module is currently selected.

In the main content area, the title "Birthday Discount Coupon" is displayed above the "General Settings" section. The "General Settings" form contains the following fields:

- Is Enabled:** Set to "Yes". A note indicates it enables the module for shop interaction, including cron jobs.
- Associated sales rule:** Set to "Birthday Discount". A note specifies it's a sales rule used for birthday coupon discounts.
- Send email X days before birthday:** Set to "2". A note explains this is when the birthday email with the coupon will be sent, with a note about negative numbers meaning the email is sent after the birthday date.

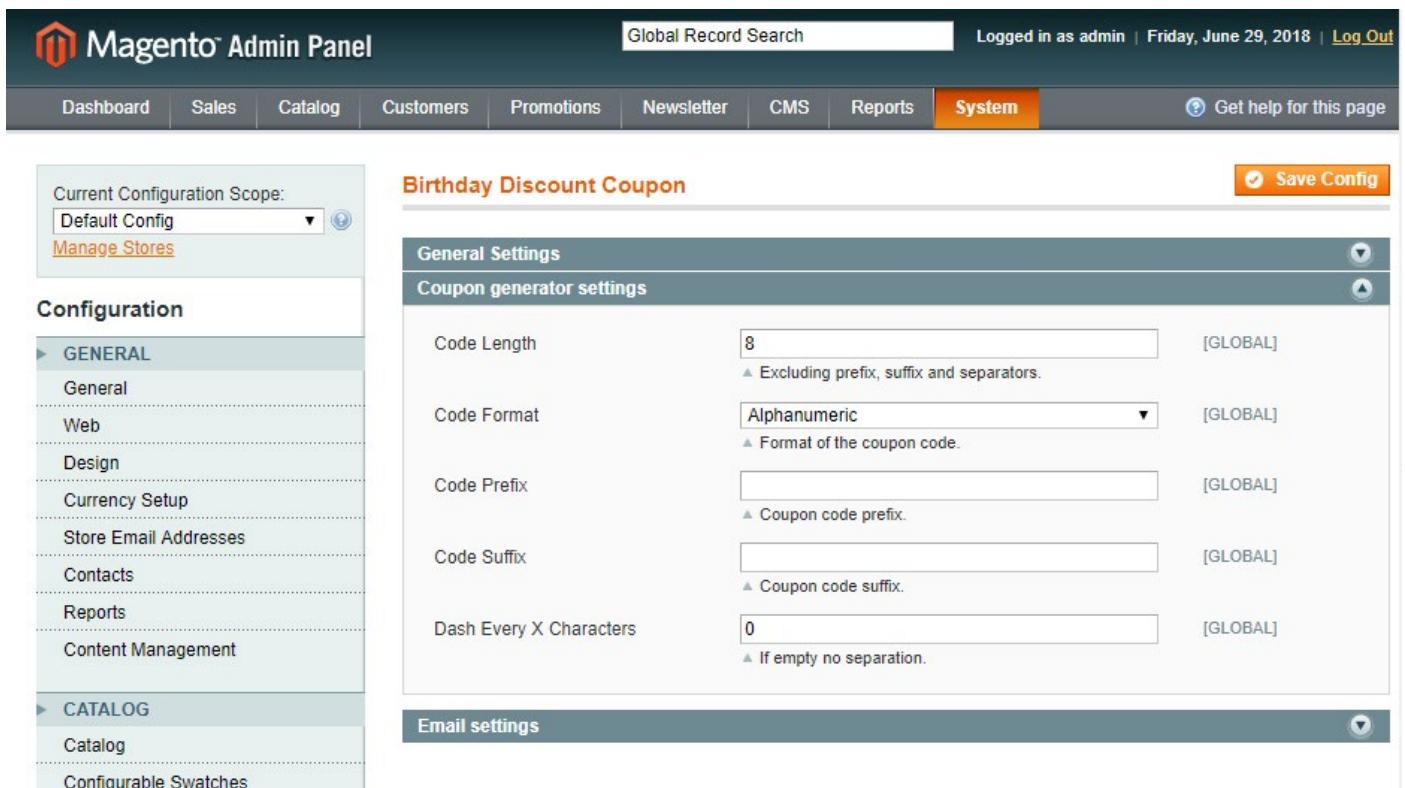
Below the "General Settings" section, there are two additional collapsed sections: "Coupon generator settings" and "Email settings".

The left sidebar features a "Configuration" menu with several categories expanded, including "GENERAL", "Web", "Design", "Currency Setup", "Store Email Addresses", "Contacts", "Reports", and "Content Management".

Configure the coupon settings

You can adjust the coupon settings on the next tab. The exact path is **System → Configuration → Neklo → Birthday Discount Coupon → Coupon generator settings**. You will see the following:

1. **Code Length** indicates the full length of the coupon code without prefixes, suffixes, and separators.
2. **Code Format** regulates the code representation: it may be alphanumeric, alphabetical, or numeric.
3. **Code Prefix** sets the prefix that will be assigned to all the codes.
4. **Code Suffix** sets the suffix that will be assigned to all the codes.
5. **Dash Every X Characters** sets the dash symbol after every given amount of characters.



The screenshot shows the Magento Admin Panel interface. The top navigation bar includes links for Global Record Search, Log Out, and System. The main menu on the left lists Configuration, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System. The System menu is currently selected. The central content area is titled "Birthday Discount Coupon". It features a "Save Config" button. A "General Settings" section contains "Coupon generator settings" with fields for Code Length (set to 8), Code Format (set to Alphanumeric), Code Prefix (empty), Code Suffix (empty), and Dash Every X Characters (set to 0). Below this is an "Email settings" section. On the left sidebar, under the Configuration menu, there are sections for GENERAL (General, Web, Design, Currency Setup, Store Email Addresses, Contacts, Reports) and CATALOG (Catalog, Configurable Swatches).

Configure the email settings

The email settings may be found on the next tab. Here is the path: **System → Configuration → Neklo → Birthday Discount Coupon → Coupon generator settings**. Here are the following options:

1. **Birthday Email Template** sets the template of the sent email.
2. **Birthday Email Sender** regulates the identity of the Sender.

The screenshot shows the Magento Admin Panel interface. The top navigation bar includes links for Global Record Search, Log Out, and a user status message. Below the navigation is a horizontal menu bar with links for Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System (which is highlighted). On the far right of the menu bar is a 'Get help for this page' link. The main content area has a left sidebar titled 'Configuration' with sections for GENERAL (General, Web, Design, Currency Setup, Store Email Addresses) and STORE (Manage Stores). The main panel title is 'Birthday Discount Coupon'. It features a 'Save Config' button. Under 'General Settings', there is a dropdown for 'Birthday Email Template' set to '[NEKLO LLC] Birthday Discount Coupon (Defau [STORE VIEW])' with a note about it being a 'Transactional email template'. Under 'Email settings', there is a dropdown for 'Birthday Email Sender' set to 'General Contact [STORE VIEW]' with a note about it being the 'Identity of sender'.

Support

Thank you for using this extension. You will find more our great solutions for Magento here:
store.neklo.com