

Mautic Integration for Magento 1 - Manual

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1. Overview

Mautic Integration for Magento is a seamless communication channel to transfer the customer-centric data to Mautic from your Magento 1 Store.

The integration works by storing the critical information fields of customers and segmenting different customers as per their past purchase behavior as purchase behavior is the most powerful way to segment your customers by historic value. Some of the crucial benefits of Customer Segmentation are:

- Identify groups of customers
- Target them for campaigns
- Promote repeat purchase and loyalty
- Defend against attrition/defection
- Acquire customers who resemble the best ones

Features:

Personalized RFM parameters:

All customers and businesses are unique on their own. However, to identify the distinct pool of customers with similar behavior, segmenting them is quintessential. The extension enables you to segment different customers on the scale ranging from (1-5) where 1 corresponds to poor and 5 corresponds to best. Also, sellers are free to set what works best for them.

Fields Mapping:

This enables sellers to map different data sets of their Magento 1 store and their Mautic account. Once the desired fields are mapped, the seamless transfer of data sets between two accounts starts.

Create Customer Segmentation:

There are multiple user roles are created in the Integration plugin such as Cart Abandoners, Best Customers, Big Spenders, Lost Cheap Customers, Lost Customers, Low Spenders,

Loyal Customers and others. Sellers can create these user roles on Mautic software for targeting these customer segments with targeted campaigns.

Create Contact Properties:

The plugin has 60+ contact property fields such as Customer Group/ User role, Accepts Marketing, Shopping Cart Customer ID, Billing City, Last Order Status and, Products Bought. These contact properties are crucial for analyzing customer purchase behavior.

The sellers can choose the fields, as per their business requirements, to create them on the Mautic. This helps in capturing the most relevant variables so as to increase the efficiency of a targeted campaign.

2. How to obtain Client ID & client Secret ID?

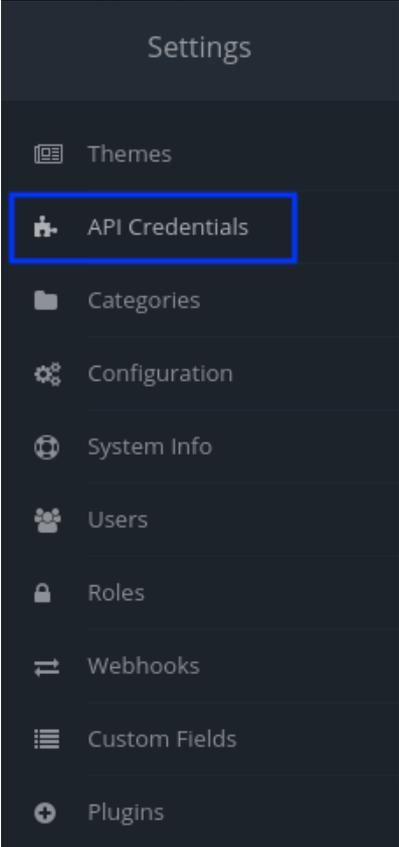
It is necessary to know the client ID and client secret ID beforehand before starting the configuration process as these identities are used in the OAuth Authentication type configuration. These IDs can be obtained from the Mautic panel.

To obtain these IDs follow the procedure:

- 1. Login to Mautic account.
- 2. Once login, click on setting icon



on the upper right-hand corner and Click API credentials tab.



- 3. Once you click on the API credential tab, a page containing client ID appears (as shown in the figure)

API Credentials (Applications) + New

Filter... OAuth 2

| | Name <input type="text"/> | Public Key | Secret Key | ID |
|--------------------------|---------------------------|----------------------|----------------------|----|
| <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | 2 |
| <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | 3 |
| <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | 4 |
| <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | 5 |
| <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | 6 |

- 4. Copy the Public Key and Secret Key from here, it's these IDs which are required.
- 5. Also, you can create new IDs if required, to do so, Click on New Button, once clicked following page appears: Here Choose **OAuth 2** in Authorization Protocol

- Enter the **Name** in the name field
- Enter the **Redirected URL** in the redirected URL field.
- 6. Once done click on **Apply** to obtain new keys.

3. Configuration

You need to first configure the extension on your Magento 1 store to achieve the true marketing automation. There are 3 aspects to the achieve full configuration.

1. Establishing a communication channel between Mautic and Magento 1 Store
2. Defining the parameters used to segment different customers
3. Mapping the relevant fields between Magento 1 and Mautic to capture customer data

- 1. Establishing a communication channel between Mautic and Magento 1 Store** To do this, first, click **Mautic>Configuration** on the top Menubar. As you follow these instruction, you're redirected to the configuration page.

There are two types of authentication type provided. You can choose any of them. Depending on the two types of Authentication, there are 2 different sets of configuration sets which are as follows:

a) Configuration with Oauth2 Authentication

b) Configuration with Basic Authentication

2. Configuration with Oauth2 Authentication

To begin the configuration:

Select **Enable** in Enable Mautic Integration field

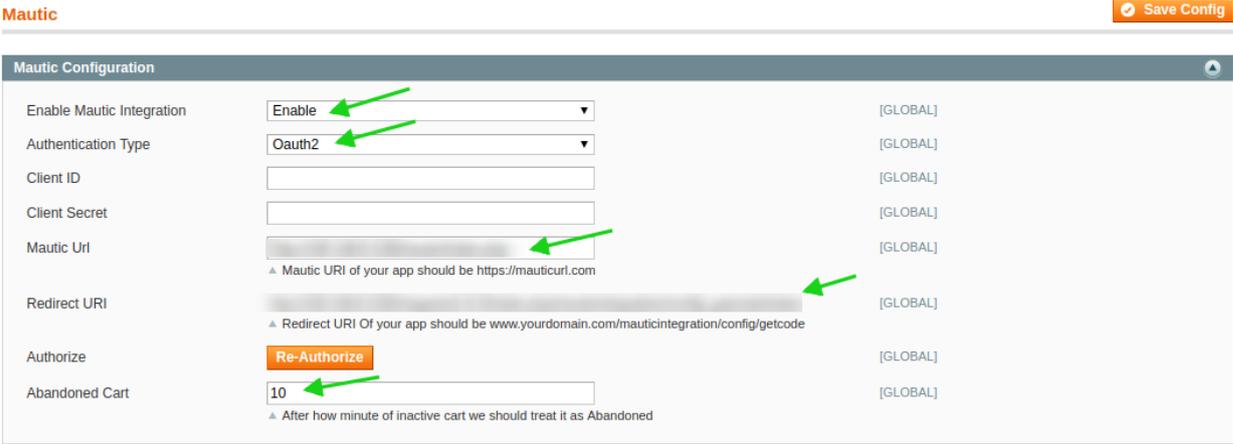
Choose **Oauth2** Authentication Type Oauth2

Now enter **Client ID**

Enter **Client Secret**

Enter **Mautic URL**

Enter **Redirect URL**



Once you're done, entering the above fields, click **Authenticate** to establish a seamless channel

Also, you can enter the No of minutes of inactivity in a cart to qualify it as an abandoned cart.

3. Configuration with Basic Authentication

To begin the configuration:

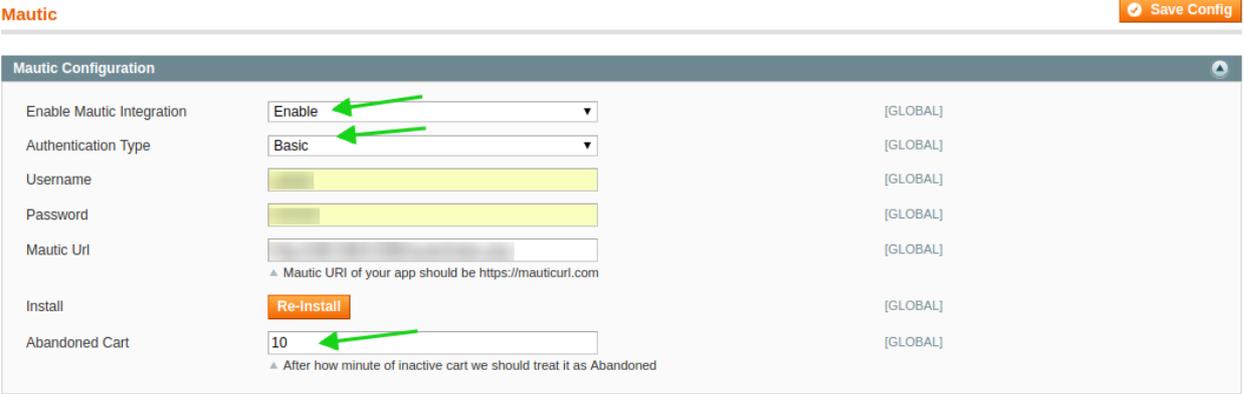
Select **Enable** in Enable Mautic Integration field

Choose **Basic** Authentication Type

Now Enter **User Name**

Enter **Password**

Enter **Mautic URL**



Once you're done, entering the above fields, click **Install** to establish a seamless channel.

Also, you can enter the No of minutes of inactivity in a cart to qualify it as an abandoned cart.

4. Defining the parameters used to segment different customers

This is one of the most crucial operations of this entire exercise. This section requires you to enter data sets to provide a real scale for different ratings. For example ?

In the recency column, all the customers who purchased within a month will be considered as best one (rating 5) and those having made the purchase with the quarter will be considered as your second best customers.

In the Frequency column, the customers who have purchased more than 20 times are defined as rating 5 customers whereas those with lower than 2 purchases are the worst performers.

In the monetary column, those who spent more than \$1000 are considered as top customers and those with spending less than \$250 are considered as low-priced customers.

| RFM Settings | | | |
|--------------|--|--|---|
| Rating | Recency (days since last order) | Frequency (total orders placed) | Monetary (total money spent) |
| 5 | Less Than: <input type="text" value="30"/> | More Than: <input type="text" value="20"/> | More Than: <input type="text" value="1000"/> |
| 4 | From: <input type="text" value="31"/> To: <input type="text" value="90"/> | From: <input type="text" value="10"/> To: <input type="text" value="20"/> | From: <input type="text" value="750"/> To: <input type="text" value="1000"/> |
| 3 | From: <input type="text" value="91"/> To: <input type="text" value="180"/> | From: <input type="text" value="5"/> To: <input type="text" value="10"/> | From: <input type="text" value="500"/> To: <input type="text" value="750"/> |
| 2 | From: <input type="text" value="181"/> To: <input type="text" value="365"/> | From: <input type="text" value="2"/> To: <input type="text" value="5"/> | From: <input type="text" value="250"/> To: <input type="text" value="500"/> |
| 1 | More Than: <input type="text" value="365"/> | Less Than: <input type="text" value="2"/> | Less Than: <input type="text" value="250"/> |

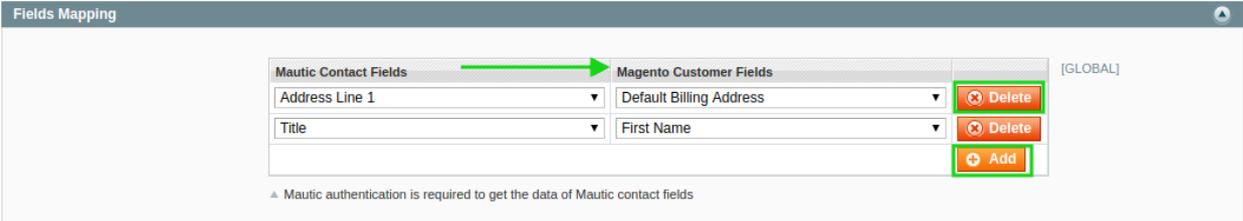
Note:

Since businesses are unique and their products distinct in some way or another from others, the sellers can enter the value as per their business needs.

5. Mapping the relevant fields between Magento 1 and Mautic to capture customer data This is the last, but definitely not the least, the step towards completion of your Mautic Integration for Magento 1 your configuration.

Here you can map relevant **Mautic Contact Fields** with **Magento 1 Customer Fields** so the relevant

datasets from your Magento 1 store can be fetched to your Mautic account. You can **Add** and **Delete** the different fields.

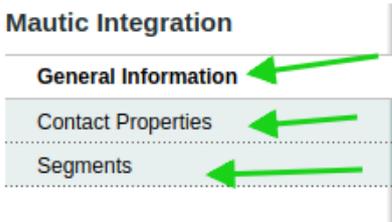


Once you complete this step the configuration of Mautic Integration stands completed.

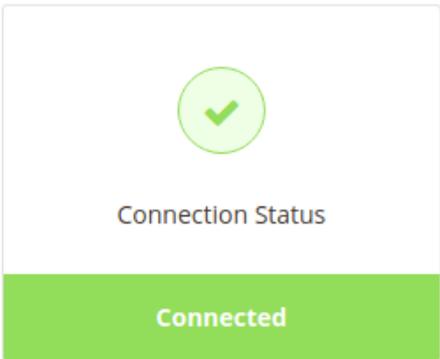
4. Mautic Integration settings

This process here corresponds to creating different contact fields and segments – embedded in the integration plugin – on Mautic as per your unique business needs.

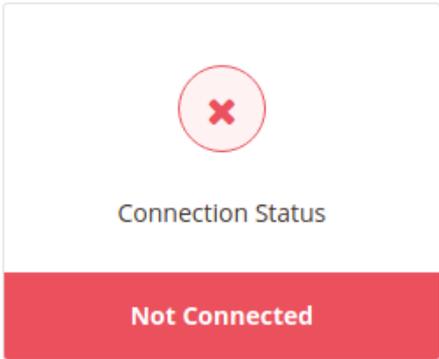
- 1. To do this, first, click **Mautic>Settings** on the top Menu bar. Once you click on this option you're redirected to the page where the desired fields are embedded. There are 3 important tabs, here is how they appear:



- 2. **General Information Tab:** It shows the connection status. Whether its established or not. Here is how it looks if the connection is established:



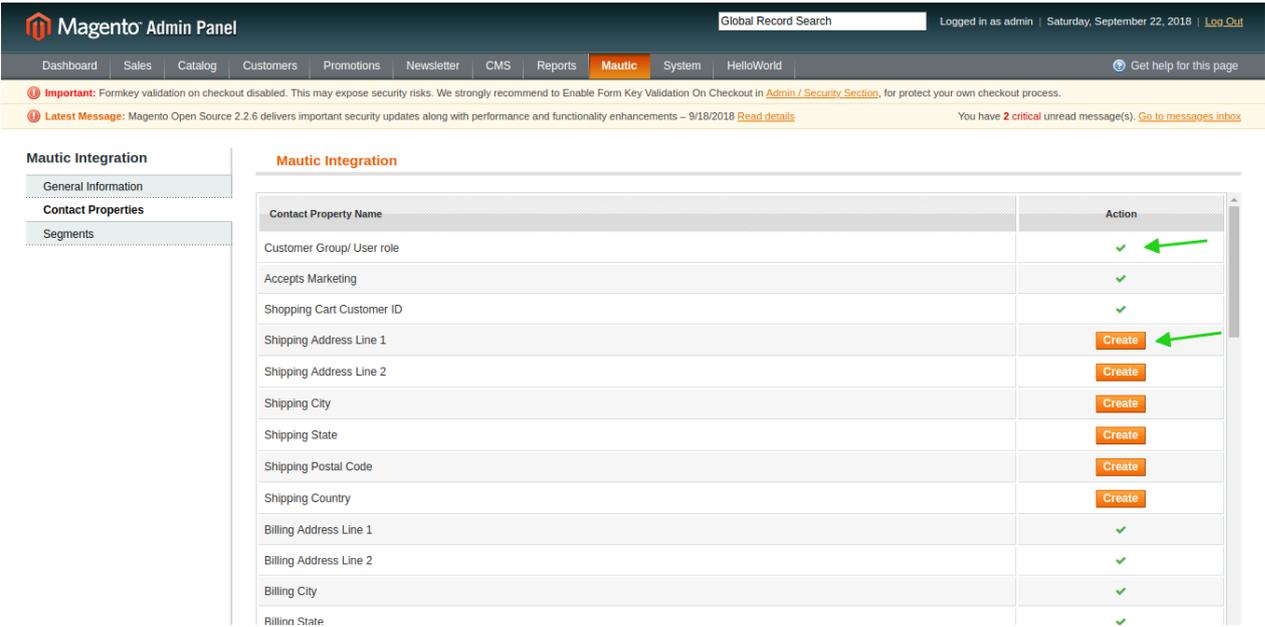
And this how it looks when there is communication channel is broken.



There is one more important field you can see on this tab ? Export Customers (see in the image below):



3. **Contact Properties Tab:** These are the fields which capture a unique dimension of a customer's information. There are 60+ contact properties embedded in the plugin as shown in the following image:



You can create the desired Contact Property on the Mautic account,

To create the property, simply click **Create** against the property name.

- 4. **Segments:** This section contains several user role types. These are used to target customers target with dedicated campaigns as per the user-profiles they belong to. These are embedded in the plugin and can be created at Mautic.

To create the segment, simply click **Create** against the segment name.

Mautic Integration

| Segment Name | Action |
|-------------------------------|--|
| Abandoned Cart | Create  |
| Best Customers | ✓  |
| Big Spenders | ✓ |
| Lost Cheap Customers | ✓ |
| Lost Customers | ✓ |
| Low Spenders | ✓ |
| Loyal Customers | ✓ |
| Mid Spenders | ✓ |
| New Customers | ✓ |
| Newsletter Subscriber | ✓ |
| One Time Purchase Customers | ✓ |
| Three Time Purchase Customers | ✓ |
| Two Time Purchase Customers | ✓ |