BF Admin Module Cart and Checkout.doc

Last Updated: 3-Sep-2013

TABLE OF CONTENTS

1 Modification History

Date	Who	Comments
24-Oct-12	Solveda	Initial
20-Nov-12	Solveda	Added "Offline Payment, Check or Money Order" as a payment method
17-Dec-12	Solveda	Removed PayPal as a payment option (would require customer giving login/pwd and access to their account).
10-Jun-13	Solveda	Added "Shipping Instructions"
10-Jun-13	Solveda	Gift Card redemptions on Check Out
11-Jun-13	Solveda	Allow for "Gift Messages" for each Shopping Cart item, if allowable based on configurations
3-Sep-13	Solveda	Added Loyalty Points processing
3-Sep-13	Solveda	Added Adjustments

2 Cart and Checkout

2.1 Overview

- This functionality will enable clients to add items to a cart and checkout on behalf of a customer

- It could be used for:
    - Phone or Live Chat Orders
    - Any other channel orders that need to be tracked within the Admin Module

- Once the Order is placed, then all the BigFish functionality becomes available:

    - Order Status Change
    - Order Complete Email
    - Review Prompt Email
    - Etc.

- The Cart and Checkout functionality will be very similar to the customer experience on an eCommerce implementation.

- The intent will be to reuse much of the functionality already developed

- The functions will be used by experienced client users so some functionality will be more streamlined

- Single page checkout will be used regardless of any eCommerce parameter setting

3   Add to Cart

- The "Add to Cart" functionality is described in the "BF Admin Module Catalog.doc" spec

- Users may add products to the cart at anytime

- When items are added, the main "Cart" area will be updated and a success message displayed on the page (control will remain on the page):

  "You have successfully added product [PRODUCT_NAME]. A single quantity was added, this can be modified during the Check Out process"

- The "header" will reflect the addition as follows:
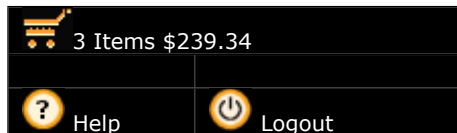
- Clicking on any part of the Cart information will redirect to the Check Out page

  o   A customer must be in "context" (see spec "*BF Admin Module General.doc*")

    - If there is not a customer in context then clicking on the Cart information in the header will display an error:

      "There is no customer currently in context. You must select a Customer in the Admin / Customer option in order to Check Out"

  o   At least one product must be in "shopping cart"

    - If there are no items in the Shopping Cart, then clicking on the Cart information in the header will display an error:

      "There are no items in the Shopping Cart. You must add items in order to Check Out"

4 Checkout

4.1 Overview

- This is using a Single Page Checkout approach, so all visual components are displayed

- See spec "*BF Cart and Checkout.doc*" for additional details

4.2 Page Title

checkout

4.3 Sales Channel

Sales Channel
Sales Channel: [drop-down]

- Populate from the ENUMERATION entity for ENUM_TYPE_ID equal to "ORDER_SALES_CHANNEL"

- Display the DESCRIPTION in the drop-down

4.4 Shopping Cart

Product#	Item#	Name		Qty		Price	Total	
100001	A107	Green Fashion Dress	📧📷	1	⟳	$6.99	$6.99	✖
100002	B787	Fashion Denim Pants	📧📷	1	⟳	$3.99	$3.99	✖
100003	C888	Crocodile Handbag	📧📷	2	⟳	$4.99	$9.98	✖
100004	A198	Green Fashion Dress	📧📷	1	⟳	$7.99	$7.99	✖
100005	F822	Fashion Denim Pants	📧📷	3	⟳	$1.99	$5.97	✖
100006	F444	Crocodile Handbag	📧📷	2	⟳	$9.99	$19.98	✖

Sub Total	$54.90
Shipping Method:	UPS
Estimated Shipping:	$6.95
Promotion (FREESHIP):	($6.95)
Loyalty Point Redemption):	($10.00)
Adjustments:	($1.00)
Adjusted Total:	$48.90
Tax (8.125%):	$3.97
Total	**$52.87**

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  - o See spec "BF Admin Module Catalog.doc" for hover display

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  - o See spec "BF Admin Module Catalog.doc" for hover display

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  - o Refreshes monetary values and summary when the Qty has been modified

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  - o Use standard confirmation "Are you sure you want to remove Product [PRODUCT#]?"
  - o If yes,
    - ▪ remove the product
    - ▪ refresh monetary values
    - ▪ re-evaluate Promotions
    - ▪ re-apply shipping and taxes

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  - o See spec "*BF Cart and Check Out.doc*" for rules of when to display
  - o Hover text "Enter a Gift Message for these Items"
  - o On click re-direct to Gift Message page

4.5 Customer Information

Customer PARTY05 Information

* Customer#:	PARTY05	Customer Role:	Customer
* First Name:	Robert	User Login:	Bob05@bob.com
* Last Name:	Smith	Customer Status:	Enabled
Email Address:	Bob05@bob.com	Export Status:	New
Home Phone:	800-555-1212	Opt-In:	● Yes O No
Cell Phone:	800-121-5555	Email Preference:	HTML
Work Phone:	888-999-8888 x898		

- This should mimic the display used throughout the Customer module, see spec "*BF Admin Module Customer.doc*"

4.6 Address

Address		
Billing Address		
Name:	⦿ Home ○ Work ○ Summer Home	
Address-1:	220 Old Country Road	
Address-2:		
City:	Mineola	
State:	NY	
Zip:	11501	
Shipping Address		
Name:	⦿ Home ○ Work ○ Summer Home	
Address-1:	220 Old Country Road	
Address-2:		
City:	Mineola	
State:	NY	
Zip:	11501	

- This should mimic the display used throughout the Customer module, see spec "*BF Admin Module Customer.doc*"

- System should attempt to find the most appropriate addresses for default display

4.7 Delivery or Pickup

Delivery or Pickup Option	
○ Pickup in Store Store ID: 100998 Manhattan Store	
○ Default Shipping ex. 7-10 Business Days	$11.95
⦿ FedEx Express [- Optional Message] ex. 3-5 Business Days	$6.95
○ FedEx Next Day	$25.00

- Clients will be required, at least for the first phase, to know the Store ID
  - When required, a "find store" option will be added

- Store ID entry
  - Will automatically select the "Pickup in Store" radio button
  - Will validate the Store and display the store name if found

- If Store Not found then display "* Store Not Found *"

4.8 Shipping Instructions

Shipping Instructions

- Helper Text
  "Confirm with the customer if there are any special delivery considerations in order to successfully deliver the items"

4.9 Promotions and Coupon Codes

Promotions and Coupon Codes			
Coupon Code:			
Promo Code	**Promo Description**	**Status**	
TENPCT	10% Off the entire order	Applied, see Shopping Cart	✖

- Similar behavior to the eCommerce implementation

4.10 Loyalty Points

Loyalty Points					
Loyalty Points ID:					
Points Available	**Amount Available**	**Expires**	**Points Redeemed**	**Amount Redeemed**	
100 ℹ	$10.00	1/1/2014	100	$10.00	✖

- Similar behavior to the eCommerce implementation

- Info Text:
  - The "Info" text should display in the same manner as "Adjustments" below, for the "LOYALTY_POINTS" adjustment

4.11 Adjustments

Adjustments	
Adjustment Type:	[drop down]

9

* Description:			
* Amount:		⟳	

Adjustment Type	Description	Amount	
DISCOUNT_ADJUSTMENT	ℹ️ Employee Discount	-100.00	✖

- ■ Adjustment Types
  - ▪ ORDER_ADJUSTMENT_TYPE.ORDER_ADJUSTMENT_TYPE_ID
    - ▪ ADDITIONAL_FEATURE
    - ▪ **DISCOUNT_ADJUSTMENT**
    - ▪ DONATION_ADJUSTMENT
    - ▪ FEE
    - ▪ LOYALTY_POINTS
    - ▪ **MISCELLANEOUS_CHARGE**
    - ▪ MKTG_PKG_AUTO_ADJUST
    - ▪ PROMOTION_ADJUSTMENT
    - ▪ SALES_TAX
    - ▪ SHIPPING_CHARGES
    - ▪ **SURCHARGE_ADJUSTMENT**
    - ▪ WARRANTY_ADJUSTMENT

- ■ Helper Text
  - ○ Amount: "Enter the amount as a correctly formatted monetary value. Make sure that it correctly entered as positive or negative. For example, a DISCOUNT_ADJUSTMENT would normally be entered as negative amount"

- ■ 3-Sep-2013: NOTE TO DEV:
  - ○ I suspect to fully implement this feature it is necessary to expose many attributes on the ORDER_ADJUSTMENT entity
    - ▪ Example: if a user selects PROMOTION_ADJUSTMENT then it is necessary to capture the Promo Code etc.
  - ○ However, the initial requirement is to allow the client to adjust the final total charged
  - ○ For the first implementation just offer the **bolded** items above
    - ▪ These types should work with a description and amount

- ■ Info Text
  - ○ The Info-Text will show additional information regarding the ORDER_ADJUSTMENT (or equivalent):

Include in Tax?	Y
Include in Shipping?	N

4.12 Shopping Cart, repeated

Shopping Cart					
Product#	Item#	Name	Qty	Price	Total
		Repeat display from above			

10

- This is displayed as a general convenience, given that the process will display a long vertical form

- Any changes in either of the "Shopping Cart" components should be reflected in the other component

4.13 Gift Card Redemptions

Gift Card Redemptions		
Gift Card Number: [ ] ⟳		
Gift Card Number	**Amount Redeemed**	**Status**
39051452501	$10.00	Applied, see Shopping Ca

- Only offered if CHECK_GIFTCARD_METHOD is not blank, "NONE", "FALSE" or "NO" (caseless check required)
- Similar behavior to the eCommerce implementation

4.14 Payment Method

- The initial display will offer the various payment methods:

Payment Method	
Balance Due:	**$52.87**
Pick One:	○ Credit Card, use card on file ○ Credit Card, enter a new card ○ Offline Payment, Check, Cash, COD or Money Order

- The Balance Due reflects the original due amount less any other Payment Methods

- Depending on the Payment Method selected, the user will be prompted for additional information as follows:

4.14.1 Credit Card, use card on file

Payment Method	
Balance Due:	**$52.87**
Pick One:	⦿ Credit Card, use card on file ○ Credit Card, enter a new card ○ Offline Payment, Check, Cash, COD or Money Order
Select One:	Drop Down

* Verification:	Entry-field

- Verification and processing will follow the same rules, and use the same Gateway, as the eCommerce implementation

4.14.2 Credit Card, enter a new card

Payment Method

Balance Due:	**$52.87**
Pick One:	○ Credit Card, use card on file ◉ Credit Card, enter a new card ○ Offline Payment, Check, Cash, COD or Money Order
* Card Type:	Drop Down
* Card Number:	Entry-field
* Expiration month:	Drop Down
* Expiration year:	Drop Down
* Verification:	Entry-field

4.14.3 Offline Payment, Check or Money Order

Payment Method

Balance Due:	**$52.87**
Pick One:	○ Credit Card, use card on file ○ Credit Card, enter a new card ◉ Offline Payment, Check, Cash, COD or Money Order

- NOTE:
  - ○ This option will be used for offline orders that essentially have a delayed payment
  - ○ Any future payments can be entered via the "Apply a Payment" documented in the spec "*BF Admin Module Orders.doc*"

Back   **Submit Order**

4.15 Submit Order

- Balance Due

  - ○ As an Admin Module user there will NOT be any interim validations when entering any of the various adjustments, this is validated on "Submit Order"

- Example #1 (negative balance):
  - Cart Total is $100
  - Simple adjustment "DISCOUNT_ADJUSTMENT" is entered as ($200)
  - Balance Due is ($100)
  - Message: "There is a negative Balance Due, please check all transactions and retry"

- Example #2 (positive balance):
  - Cart Total is $100
  - Gift Card entry for $50
  - Balance Due is $50
  - Message: "There is a Balance Due, please check all transactions and retry"

- Perform all additional appropriate validations, as per eCommerce processing

- Callout to the Payment Gateway
  - If successful then continue
  - If failure, then display similar message as eCommerce implementation
  - See spec "*BF Cart and Check Out.doc*"

- Create an Order
  - Display confirmation page with order#

5   Gift Message

5.1   Processing

- See processing rules in spec "*BF Cart and Check Out.doc*"

5.2   UI Guideline

Shopping Item					
Product#	**Item#**	**Name**	**Qty**	**Price**	**Total**
100003	C888	Crocodile Handbag	2	$4.99	$9.98

Gift Message #1

From:	
	50 character limit (50 characters left)
To:	
	50 character limit (50 characters left)
Gift Message Helper:	[drop-down]
Gift Message:	Entry-field
	255 character limit (255 characters left)

Gift Message #2

From:	
	50 character limit (50 characters left)
To:	
	50 character limit (50 characters left)
Gift Message Helper:	[drop-down]
Gift Message:	Entry-field
	255 character limit (255 characters left)

Back   **Save**