



BF Admin Module Customers.doc

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TABLE OF CONTENTS

<u>1</u>	<u>Modification History</u>	5
<u>2</u>	<u>Navbar and Sub-Menu</u>	7
<u>3</u>	<u>List Organizations</u>	8
3.1	Overview	8
3.2	OFBiz Mapping	8
3.3	UI Guideline	8
3.4	Processing	9
<u>4</u>	<u>Organization Detail</u>	10
4.1	UI Guideline	10
4.2	Address Book	10
4.3	Users	10
<u>5</u>	<u>Customer Toolbar Actions</u>	12
5.1	Standard Toolbar Icons	12
5.2	Request-Catalog and Contact-Us overrides	12
<u>6</u>	<u>View Customers</u>	14
6.1	Page Title	14
6.2	Search Capability	14
6.3	Customer Role	14
6.4	List	14
6.5	Sort Sequence	14
6.6	Visual Guideline	15
6.7	Processing	15
6.8	Technical Note	15
<u>7</u>	<u>Customer Detail</u>	17
7.1	Main Customer Section	17
7.2	Personal Information & Custom Attributes	18
7.3	Address Book: New Mode	19
7.4	Address Book: Edit Mode	20
7.5	Website Login	20
7.6	Customer Attributes	21
7.7	Toolbar Icons	21
7.8	Helper Icons	21
<u>8</u>	<u>Maintain Customer Address</u>	22
8.1	Processing	22
8.2	UI Guideline	22
8.3	Processing Rules	22
8.4	Validation	23
<u>9</u>	<u>Classifications</u>	24
9.1	Overview	24
9.2	OFBiz Mapping	24
9.3	List Screen: UI Guideline	24
9.4	Detail Screen: UI Guideline	25
9.5	Customers	25
<u>10</u>	<u>Request Catalog Events</u>	27

10.1	Accessed From	27
10.2	Search Capability	27
10.3	OFBiz Mapping	27
10.4	Sort Sequence	27
10.5	List Screen	28
10.6	Processing	28
10.7	List Screen Actions	28
10.8	Export to CSV Function	28
10.9	Detail Screen	29
11	Contact Us Events	31
11.1	Accessed From	31
11.2	Search Capability	31
11.3	OFBiz Mapping	31
11.4	Sort Sequence	31
11.5	List Screen	31
11.6	Processing	32
11.7	List Screen Actions	32
11.8	Export to CSV Function	32
11.9	Detail Screen	33
12	Request a Quote Events	34
12.1	Accessed From	34
12.2	Search Capability	34
12.3	OFBiz Mapping	34
12.4	Sort Sequence	34
12.5	List Screen	34
12.6	Processing	35
12.7	List Screen Actions	35
12.8	Export to CSV Function	35
12.9	Detail Screen	36
13	Customer Notes	37
13.1	Note List UI Guideline	37
13.2	Note Detail UI Guideline	37
14	Customer Website Activity	39
14.1	UI Guideline	39
14.2	Processing	39
14.3	Registered User	39
14.4	Email Sent	40
14.5	Abandoned Cart	40
14.6	Contact Us	40
14.7	Request Catalog	41
14.8	Order Placed	41
14.9	Order Status Changes	41
14.10	Visit	42
14.11	Rating Posted:	42
15	Email Communication Detail	43
15.1	Detail Screen UI Guideline	43
15.2	Technical Notes	43
16	Abandoned Cart Analysis	44
16.1	Abandoned Cart: UI Guideline	44

16.2	Abandoned Cart: Processing	44
16.3	Abandoned Cart: SQL	44
16.4	Abandoned Products: UI Guideline	46
16.5	Abandoned Products: Processing	46
16.6	Abandoned Products: SQL	46
17	Abandoned Cart List	48
17.1	Processing	48
18	Abandoned Cart Detail	49
18.1	UI Guideline	49
18.2	Processing	49
19	Visit Detail Page	50
19.1	Visit UI Guideline	50
19.2	Technical Notes	50

1 Modification History

Date	Who	Comments
19-Sep-11	Solveda	Initial
14-Oct-11	Solveda	Ongoing changes for initial implementation
9-Nov-11	Solveda	Using Customer ROLE in all instances (previously used "type" in some cases)
15-Nov-11	Solveda	Changed all read-only data displays to be not-bold.
18-Nov-11	Solveda	Added "Request Catalog Events" and "Contact Us Events" browse and download functions.
21-Dec-11	Solveda	Modified "Request Catalog" and "Contact Us" to reflect a new implementation using the CUST_REQUEST and CUST_REQUEST_ATTRIBUTE entities
22-Dec-11	Solveda	View Customers: removed email from search and results, added Address to list
6-Jan-12	Solveda	Added "Notes" to the Customer-Detail page with the ability to add/edit in the Customer-Note-Detail page
18-Jan-12	Solveda	Added "date of request" to the Request-Catalog and Contact-Us file downloads
24-Jan-12	Solveda	Added knowledge of Customer Role "Guest", for those customers who check-out as a guest without registering
14-May-12	Solveda	Added XML export for Customers, Contact-Us and Request Catalog
8-Jun-12	Solveda	Phone information moved to the "Personal Information" section for a user, no longer associated with addresses
28-Jun-12	Solveda	Added "Personal Information" section that will reflect the optional information collected on registration (currently Gender and DOB)
11-Oct-12	Solveda	Added "Customer Website Activity" section
18-Oct-12	Solveda	Several changes: <ul style="list-style-type: none"> - Added "Customer#" to Request-Catalog and Contact-Us. - Major rework of Customer-List, Detail and the interaction between related Customer information to be more consistent with other functions. - Introduction of toolbar icons throughout - New "Add a Customer" function. - New "Address Book" functions
24-Oct-12	Solveda	Added "VISIT" info to "Website Activity"
5-Dec-12	Solveda	Changes to clarify "Add Customer" function
10-Jan-13	Solveda	Added "Email Address" search
13-Feb-13	Solveda	Set defaults for "from" and "to" dates in Request-Catalog, Contact-Us and Abandoned Cart
26-Feb-13	Solveda	Added "Text Alert" attribute to customer profile.
18-Apr-13	Solveda	Added "Customer Picker"
17-Jul-13	Solveda	Added ability to build "Customer Role" selections in search screen from parameter CUSTOMER_ROLE_INC_SEARCH
28-Aug-13	Solveda	Customer Detail Screen: First and Last name are read-only, removed telephone numbers (see "Customer Detail vs Personal Info" section)
6-Nov-13	Solveda	Added simple "Customer Attributes" (PARTY_ATTRIBUTE)

		display on Customer Detail page.
31-Dec-13	Solveda	Clarified that Address-Book maintenance should NOT use DIV-sequencing
17-Mar-14	Solveda	Website Login is optional when creating a new customer
1-May-14	Solveda	Added "Organization" concepts
19-May-14	Solveda	Added "Classification" concepts
5-Jun-14	Solveda	Moved "picker" functions to spec BF-Admin-Module-Generic-Pickers.doc.
8-Jul-14	Solveda	Added "Request a Quote Event" function

customers

View Organization

This function provides the ability to search for Organizations. Organizations are entities that have associated users.

View Customers

This function provides the ability to search for customers in the database. A list of customers is displayed, with a click-through to the Customer Detail screen.

Add a Customer

This function will allow for the quick addition of a Customer.

Customer Classifications

Maintain a group/member relationship for Customer Classifications.

Contact Us Events

This function will allow for browsing and downloading of any Contact Us events that are stored.

Request Catalog Events

This function will allow for browsing and downloading of any Request Catalog events that are stored.

Request Quote Events

This function will allow for browsing and downloading of any Request Quote events that are stored.

Abandoned Cart Analysis

Track and review all abandoned carts

3 List Organizations

3.1 Overview

- An Organization is a concept to support a B2B implementation of BigFish
- Consider an Office Supply Store
 - Will setup an Organization, like IBM
 - The Organization will have a primary Billing and Shipping (default) address
 - This Organization will have Users, all of which would be website users
 - Each User needs access to the B2B eCommerce site
 - The Billing / Shipping Address could be different from the primary Organization address

3.2 OFBiz Mapping

- An Organization is setup as a PARTY and PARTY_GROUP entities
 - Name: PARTY_GROUP.GROUP_NAME
 - Status: PARTY.STATUS_ID
 - Type: PARTY_GROUP
 - Role: INTERNAL_ORGANIZATION
 - Service: createPartyGroup
 - Note: createPartyGroup service requires that the first letter of the PARTY_ID is non-numeric
- Each User is setup as a PARTY entity
 - Type "PERSON"
 - Role "CUSTOMER"
- The relationship between the Organization and the User is managed via the PARTY_RELATIONSHIP entity
 - Service: createPartyRelationship
 - Note: BF Admin login must have PARTYMGR_REL_CREATE privileges
 - Group Rollup

PARTY_ID_FROM	Org#
PARTY_ID_TO	Party#
PARTY_TYPE_ID_FROM	"INTERNAL_ORGANIZATION"
ROLE_TYPE_ID_TO	"CUSTOMER"
PARTY_RELATIONSHIP_TYPE_ID	"GROUP_ROLLUP"

3.3 UI Guideline

view organizations

Enter Search Criteria:

☐ All Stores

Organization Name:

Search

<< Previous Page		Showing Rows 1-8 of 300	Next Page>
Matching Organizations:			
Org#	Name	Billing Address	Status
ORG01	International Business Machines	See Processing	Enabled
ORG 02	General Electric	See Processing	Enabled
ORG 03	Solveda LLC	See Processing	Enabled
Back		Add	

3.4 Processing

- Retrieval
 - Use a "starts with" query
- Billing Address:
 - Address-Line-1 + ", " + City/Town + ", " + State/Province

4 Organization Detail

4.1 UI Guideline

organization detail (ORG05)

Organization ORG05 [Name]		Store: XYZ
* Org#: ORG05		
Name: <input type="text" value="Solveda LLC"/>	Status: Enabled	

- Edit vs Add mode

	Field Type	Add Mode	Edit Mode
Org#	Entry	Editable. On SAVE this cannot be a duplicate of an existing PARTY record	Display only
Name	Entry, mandatory	Editable	Editable
Status	Drop Down Enabled / Disabled	Default to "Enabled"	Editable

4.2 Address Book

- Implemented the same as the Customer Address Book

4.3 Users


- Lists associated customers to that Organization

Users
Same Display as the Customer List screen, showing PARTY entities for this Organization

Back








Add

- "Add"
 - uses the Generic Customer Picker to allow for the selection of a customer to be added into the current Organization
 - See spec "*BF Admin Module Generic Pickers.doc*" for details
 - Note: a Customer can only belong to ONE organization. Therefore, the selected customer needs to be removed from the existing organization before adding to the current organization
- Toolbar
 - The toolbar on the Customer List display should be overridden to display the following icons:
 -


- Tooltip is set to "Edit Customer Details"
- Redirect to the Maintain Customer page in "edit" mode
- 
 - Tooltip is "Remove Customer from Organization"
 - If clicked provide a confirmation dialog:
 - Are you sure you want to remove Customer [Customer-Name]?"
 - Valid responses are Yes and No

5 Customer Toolbar Actions

5.1 Standard Toolbar Icons

- The following icons are to be offered on all Customer related screens
 - See additional rules in the *BF-Admin-Module-General* spec
- - Tooltip is set to "Edit Customer Details"
 - Redirect to the Maintain Customer page in "edit" mode
- 
 - Tooltip is set to "Customer Orders [n]"
 - If count is ZERO then display the tool-tip but do not offer a Link
 - Redirect to Order List page (spec "*BF Admin Module Orders.doc*")
- 
 - Tooltip is set to "Customer Notes [n]"
 - Redirect to Customer Notes page
- 
 - Tooltip is set to "Contact Us Events [n]"
 - If count is ZERO then display the tool-tip but do not offer a Link
 - Redirect to Contact Us Events Page
- 
 - Tooltip is set to "Catalog Requests [n]"
 - If count is ZERO then display the tool-tip but do not offer a Link
 - Redirect to Catalog Request page
- 
 - Tooltip is set to "Customer Website Activity"
 - Redirect to Website Activity page
- 
 - Tooltip is set to:
 - On list row and all detail pages: "Export Customer to PDF"
 - On list page: "Export ALL Customers on this page to PDF"
 - PDF output should mimic the display of "Customer Detail"
- 
 - Tooltip is set to
 - On list row and detail pages: "Export Customer to XML"
 - On list page: "Export ALL Customers on this page to XML"
 - Export data to XML format; this function should re-direct to the export function documented in the "*BF Admin Module Feeds.doc*" specification

5.2 Request-Catalog and Contact-Us overrides

- 
 - Tooltip is set to "Export Details to XML"

- - Tooltip is set to "Export Details to CSV"

6 View Customers

6.1 Page Title

- view customers

6.2 Search Capability

- Cust#, exact match
- Customer Name, contains
- User Login, contains
- Email Address, contains
- Customer Status, default all checked
- Customer Role, default all checked, see below
- Export Status, default all checked

6.3 Customer Role

- The actual checkboxes to be offered are built dynamically based on the system parameter CUSTOMER_ROLE_INC_SEARCH
- This parameter identifies specific Role-Type-ID values
- The display caption should be derived from the ROLE_TYPE.DESCRPTION attribute. In SQL, this is solved as follows:

```
SELECT DESCRIPTION
FROM   ROLE_TYPE
AND    ROLE_TYPE_ID IN ([CUSTOMER_ROLE_INC_SEARCH])
ORDER BY   ROLE_TYPE_ID
```

- Technical Consideration:
 - Store values in the session
 - This query, or equivalent, should NOT be executed query every time the Customer List screen is visited

6.4 List

- Cust#, centered
- Last Name, left-aligned
- First Name, left-aligned
- User Login, left aligned
- Address, left-aligned, address-1 + city/town + state/province
- Customer Role, centered
- Customer Status, centered
- Export Status, centered

6.5 Sort Sequence

- Order#

6.6 Visual Guideline

view customers

Enter Search Criteria:

☐ All Sto

Customer#:

User Login:

Customer Name:

Email Address:

Customer Status:

☒ All ☒ Enabled ☒ Disabled

Customer Role:

☒ All ☒ Customer ☒ Email Subscriber ☒ Guest

Export Status:

☒ All ☒ New ☒ Exported

Search

<< Previous Page

Showing Rows 1-8 of 300



Next Page>>

Matching Customers:

Cust#	Last Name	First Name	User Login	Address	Cust Role	Cust Status	Export Status	
PARTY01	Last	First	a@a.com	See Processing	Customer	Enabled	New	
PARTY02	Last	First		See Processing	Email Subscriber	Enabled	New	
PARTY03	Last	First		See Processing	Email Subscriber	Enabled	Exported	
PARTY04	Last	First	b@b.com	See Processing	Customer	Enabled	New	
PARTY05	Last	First		See Processing	Guest	Disabled	Exported	
PARTY06	Last	First		See Processing	Email Subscriber	Enabled	Exported	
PARTY07	Last	First	c@c.com	See Processing	Customer	Enabled	New	

Back

Add



6.7 Processing

- Address:
 - Address-Line-1 + ", " + City/Town + ", " + State/Province

6.8 Technical Note



- This function should only consider a PARTY.PARTY_TYPE_ID = 'PERSON'.
- Customer STATUS
 - PARTY.STATUS_ID
 - PARTY_ENABLED
 - PARTY_DISABLED
- Customer ROLE:
 - PARTY -> PARTY_ROLE

- PARTY_ROLE.ROLE_TYPE_ID
 - CUSTOMER
 - EMAIL_SUBSCRIBER
 - GUEST
- EXPORT STATUS:
 - PARTY_ATTRIBUTE.ATTR_NAME = IS_DOWNLOADED
 - "Y" the record has been downloaded
 - NOT "Y" the record has NOT been downloaded
- Multi Store Consideration
 - Product Store ROLE:
 - PARTY -> PRODUCT_STORE_ROLE
 - PRODUCT_STORE_ROLE.ROLE_TYPE_ID
 - CUSTOMER
 - EMAIL_SUBSCRIBER
 - GUEST

7 Customer Detail

7.1 Main Customer Section

customer detail (PARTY05)

Customer PARTY05 [First + Last]		Store: XYZ
* Customer#:	PARTY05	Customer Role: Customer
Email Address:	<input type="text" value="Bob05@bob.com"/>	User Login: Bob05@bob.com  
Opt-In:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Customer Status: <input type="text" value="Enabled"/>
Text Alerts:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Export Status: <input type="text" value="New"/>
Email Preference:	<input type="text" value="HTML"/>	Organization: <input type="text" value="Solveda LLC"/>

■ Add vs Edit Mode

	Field Type	Add Mode	Edit Mode
Customer#	Entry	Editable. On SAVE this cannot be a duplicate of an existing PARTY record	Display only
Email Address	Entry, opt	Editable	Editable
Customer Role	Display	Set to "Customer"	Display only
User Login	Display	Blank, not editable	Display only
Customer Status	Drop Down Enabled / Disabled	Default to "Enabled"	Editable
Export Status	Drop Down New / Exported	Default to "New"	Editable
Opt-In	Radio Button Yes / No	Default to "Yes"	Editable
Email Pref	Drop Down HTML / Plain Text	Default to "HTML"	Editable
Text Alerts	Radio Button Yes / No	Default to "No"	Editable
Organization	Display	Drop down of all available Organizations	Drop down of all available Organizations

■ Customer Detail vs Personal Info

- First & Last Name
 - These attributes are REQUIRED within OFBiz and the DIV Sequencing strategy for the "PersonalInfo" component (Mandatory tag is set to SYS_YES)
 - Any changes to these attributes are allowable on the Personal Info section
 - For easy reference the First + Last will be displayed on the box heading
- Phone Numbers
 - No Phone Numbers are displayed on the Customer Detail UI
 - If allowable (or required) for entry, then the DIV Sequencing strategy will expose these for edit on the Personal Info section

■ Email entries

- The Email-Address field is used as a contact email for the new customer, it does not necessarily have to be the same as the Login Email, although typically this will be the case
- It is possible for a duplicate Email-Address to be stored—some customers may share an email address with other customers (for example, a husband/wife may share a family email address)

■ Validation

- Customer# (Add Mode only):
 - Must be a valid ID, see spec "[*BF-Admin-Module-General.doc*](#)"
- First Name
 - Required field. Error: "First Name is a required field."
- Last Name
 - Required field. Error: "Last Name is a required field."
- Email Address
 - Optional. If entered the entry must be a validly formatted email address
 - Error: "Email is optional but if entered it must be a valid email address."

■ Facebook Icon

- The Facebook Icon  is displayed if PARTY_ATTRIBUTE.FACEBOOK_USER = TRUE

■ Helper Text

- Customer Status: "If the Customer Status is changed to DISABLED, and there is an associated User-Login, then the login will also be DISABLED"

7.2 **Personal Information & Custom Attributes**

Personal Information (collected as part of the registration process)	
* First Name:	<input type="text" value="Robert"/>
* Last Name:	<input type="text" value="Smith"/>
* Title:	<input type="text" value="Mr"/>
* Gender:	<input type="text" value="Male"/>
Date of Birth:	<input type="text" value="30-May"/>
* Date of Birth:	<input type="text" value="05/30/70"/>
Loyalty Point ID:	<input type="text" value="1212555800"/>
* Ring Size:	<input type="radio"/> Five <input type="radio"/> Six <input checked="" type="radio"/> Seven <input type="radio"/> Eight

- Personal Information is client specific, each client may prompt for certain attributes to be collected as part of the eCommerce Registration process
- Custom Attributes are a special feature that extend the customer profile information using an XML definition file

- For more information on both Personal Information and Custom Attributes see spec "[BF Customer Account Management.doc](#)"
- All attributes are controlled by the DIV-Sequencing strategy
- Personal Information is stored in the PARTY_ATTRIBUTE entity using the following ATTR_NAME values
 - TITLE
 - GENDER
 - DOB_MMDD
 - DOB_MMDDYYYY
 - DOB_DDMM
 - DOB_DDMMYYYY
 - LOYALTY_POINT_ID
- Note:
 - TITLE needs to be converted from the ENUMERATION entity using a type of "PERSONAL_TITLE"
 - If no Personal Information is available then do not display the box
- In "Add" mode:
 - Any Personal Information or Custom Attributes that is defined for a specific client implementation should be prompted
- In "Edit" mode:
 - Any Personal Information or Custom Attributes that has been collected should be displayed
- Validation
 - Personal Information: all fields are required, since they are controlled by the DIV-Sequencing implementation as per the client requirements
 - Custom Attributes: same rules should be applied as per the eCommerce implementation, see spec "[BF Customer Account Management.doc](#)"

7.3 **Address Book: New Mode**

Address Book	
Billing Address	
* Nickname:	<input style="width: 90%;" type="text" value="Billing"/>
* Address-1:	<input style="width: 90%;" type="text"/>
Address-2:	<input style="width: 90%;" type="text"/>
* City:	<input style="width: 50%;" type="text"/>
* State:	<input style="width: 50%;" type="text" value="drop-down"/>
* Zip:	<input style="width: 30%;" type="text"/>
Shipping Address	

<input checked="" type="checkbox"/> Shipping Same as Billing
* Nickname: <input type="text" value="Billing"/>
* Address-1: <input type="text"/>
Address-2: <input type="text"/>
* City: <input type="text"/>
* State: <input type="text" value="drop-down"/>
* Zip: <input type="text"/>

Back

Save

- Billing and Shipping Address
 - See spec "*BF Customer Account Management.doc*" for validation rules and messages

7.4 Address Book: Edit Mode

Address Book 	
Nickname	Address
Billing	35 Bennett Place, Amityville, NY 11701
Shipping	220 Old Country Road, Mineola, NY 11501
Summer Home	17 Tampa Bay Blvd, Tampa Bay, FL 99887

Back

Save

[toolbar icons]

- The Name "link" and the "add icon" should redirect to the Maintain Customer Address function

7.5 Website Login

Website Login Creation	
Login Email:	<input type="text"/>
Confirm Email:	<input type="text"/>
Password:	<input type="text"/>
Confirm Password:	<input type="text"/>

- This section is optional and is ONLY displayed if there is no existing website login
 - If a website login already exists then other features of the Admin Module are to be used to modify and maintain
 - If any data is entered into any of the attributes then ALL attributes must have data entered
 - "Website Login Creation: if any data is entered then ALL attributes must be completed. If you do not want to setup a WebSite Login then leave all attributes blank."

- Login Email, if entered:

- Must be valid email address formats
"Login Email must be in a valid email address format"
- Must be unique
"The Login Email [LOGIN_EMAIL] is already in use by Customer # [PARTY_ID] named [FIRST_NAME, LAST_NAME]."
- Confirm Email must equal Login Email
 - If Login-Email has a valid email address, the Confirm-Email must match the Login-Email
"Confirm Email must match the Login Email"
- Password and Confirm Password
 - If the Login-Email has a valid email address, the Password must be entered and conform to the rules described in the spec "BF Customer Account Management.doc"
- Consider:
 - This is optional
 - Securing the account: could auto-send a "forgot" password to the user so it is not known to the customer
 - **Not required for the initial development**

7.6 Customer Attributes


Customer 10099 Attributes	
Attribute	Value
STUDENT_ID	123456
IS_DOWNLOADED	YES

- This is a simple display of the entity PARTY_ATTRIBUTE
 - Attribute Name PARTY_ATTRIBUTE.ATTR_NAME
 - Value PARTY_ATTRIBUTE.ATTR_VALUE

7.7 Toolbar Icons

- See Customer List page
- Toolbars are NOT displayed if adding a new Customer

7.8 Helper Icons

- 
 - Tooltip is set to "User Login Info"
 - Redirect to Manage User Detail (spec "BF Admin Module Manage Users.doc")

8 Maintain Customer Address

8.1 Processing

- Can be accessed in either Edit or Add mode

8.2 UI Guideline

customer address

Customer PARTY05 Information		Store: XY
* 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: <input checked="" type="radio"/> Yes <input type="radio"/> No
Cell Phone:	800-121-5555	Email Preference: HTML
Work Phone:	888-999-8888 x898	Text Alert: <input type="radio"/> Yes <input checked="" type="radio"/> No

Address	
* First Name:	<input type="text" value="Robert"/>
* Last Name:	<input type="text" value="Smith"/>
Nick Name:	<input type="text" value="Billing"/>
* Country:	<input type="text" value="United States"/>
* Address-1:	<input type="text" value="35 Bennett Place"/>
Address-2:	<input type="text"/>
Address-3:	<input type="text"/>
* City:	<input type="text" value="Amityville"/>
* State:	<input type="text" value="NY drop-down"/>
* Zip:	<input type="text" value="11701"/>

[Back](#)[Save](#)

[toolbar icons]

8.3 Processing Rules

- This page should show all available Address attributes
 - It should NOT consider what is displayed in the eCommerce implementation using the DIV-Sequencing strategy

- Client users will be expected to understand which attributes are relevant for their implementation
- If adding a New address
 - Default First and Last Name from the customer information
- First / Last Name mandatory vs optional
 - If updating a BILLING_ADDRESS then mandatory
 - Display required "*" and validate appropriately
 - Else optional
 - Do not display "*"
- Labels should reflect the eCommerce implementation
 - For example, some clients may allow for the entry of a Company Name, in which case the attributes may be repurposed as follows:

Address-1	=	"Company"
Address-2	=	"Address-1"
Address-3	=	"Address-2"

8.4 Validation

- See spec "BF Customer Account Management.doc" for validation rules and messages

9 Classifications

9.1 Overview

- A Classification is a mechanism to group together customers into groups
 - Typically used in Pricing Rules for B2B implementations
- The implementation is very similar to the “Organization” functions at the beginning of this document
 - The one difference of note is that a Customer can be a member of MULTIPLE Classification Groups

9.2 OFBiz Mapping

- Party Classifications have a grouping and membership structure:
- PARTY_CLASSIFICATION_GROUP
 - PARTY_CLASSIFICATION_GROUP_ID User entered
 - PARTY_CLASSIFICATION_TYPE_ID User selected (drop down populated from PARTY_CLASSIFICATION_TYPE)
 - PARENT_GROUP_ID Blank
 - DESCRIPTION User entered
- PARTY_CLASSIFICATION
 - PARTY_ID “Member” PARTY_ID
 - PARTY_CLASSIFICATION_GROUP_ID Xref to PARTY_CLASSIFICATION_GROUP
 - FROM_DATE User entered
 - THRU_DATE User entered

9.3 List Screen: UI Guideline

view classifications

Enter Search Criteria:	<input type="checkbox"/> All Stores
Classification Name: <input type="text"/>	
<input type="button" value="Search"/>	

<< Previous Page		Showing Rows 1-8 of 300	Next Page >>
Matching Classifications:			
Classification #	Description	Type	
PRICING-TIER-1	Standard Tier 1 Discounts	TRADE_CLASSIFICATION	
PRICING-TIER-2	Standard Tier 2 Discounts	TRADE_CLASSIFICATION	
PRICING-SPECIAL	Special pricing for our most loyal accounts	TRADE_CLASSIFICATION	

[Back](#)[Add](#)

9.4 Detail Screen: UI Guideline

classification detail (PRICING-TIER-1)

Classification PRICING-TIER-1		Store: XYZ
* Classification ID:	<input type="text" value="PRICING-TIER-1"/>	
Type:	<input type="text" value="TRADE_CLASSIFICATION"/>	
Description:	<input type="text" value="Standard Tier 1 Discounts"/>	

■ Edit vs Add mode

	Field Type	Add Mode	Edit Mode
Org#	Entry	Editable. On SAVE this cannot be a duplicate of an existing classification	Same
Type	Drop-down, optional	Editable	Editable
Description	Entry, optional	Editable	Editable

9.5 Customers

■ Lists associated customers to that Classification

Users
Same Display as the Customer List screen, showing PARTY entities for this Organization


[Back](#)[Add](#)

■ "Add"

- uses the Generic Customer Picker to allow for the selection of a customer to be added into the current Classification
 - See spec "[BF Admin Module Generic Pickers.doc](#)" for details

■ Toolbar

- The toolbar on the Customer List display should be overridden to display the following icons:
 - - Tooltip is set to "Edit Customer Details"
 - Redirect to the Maintain Customer page in "edit" mode

- 
 - Tooltip is "Remove Customer from Classification"
 - If clicked provide a confirmation dialog:
 - Are you sure you want to remove Customer [Customer-Name]?"
 - Valid responses are Yes and No

10 Request Catalog Events

10.1 Accessed From

- This function can be accessed from:
 - The navigation menu, search criteria will default as shown, rows will not be retrieved until the "Search" button is clicked
 - The Customer specific pages, Customer# is pre-filled as appropriate and the rows are auto-retrieved

10.2 Search Capability

- From Date, CREATED_STAMP
- To Date, CREATED_STAMP
- Last Name, contains
- Export Status, ATTR_NAME=IS_DOWNLOADED
 N=New
 Y=Exported
- From and To Date defaults
 - Both dates should be set to the current system date

10.3 OFBiz Mapping

- The contents of Contact Us form are stored in the CUST_REQUEST and CUST_REQUEST_ATTRIBUTE entities
- CUST_REQUEST_TYPE_ID = "RF_CATALOG"
 - ID CUST_REQUEST_ID
 - Product Store PRODUCT_STORE_ID
 - Customer# FROM_PARTY_ID
 - Last Name, ATTR_NAME=LAST_NAME
 - First Name, ATTR_NAME=FIRST_NAME
 - Address1, ATTR_NAME=ADDRESS1
 - Address2, ATTR_NAME=ADDRESS2
 - Address3, ATTR_NAME=ADDRESS3
 - City/Town, ATTR_NAME=CITY_TOWN
 - State/Province, ATTR_NAME=STATE_PROVINCE
 - Zip/Post Code, ATTR_NAME=ZIP_POST_CODE
 - Country, ATTR_NAME=COUNTRY
 - Email Address, ATTR_NAME=EMAIL_ADDRESS
 - Phone#, ATTR_NAME=CONTACT_PHONE
 - Comment, ATTR_NAME=COMMENT

10.4 Sort Sequence

- Last Name

10.5 List Screen

request catalog event list

Enter Search Criteria:

From Date: 5/18/11

To: 5/20/11

Customer#:

Last Name:

Export Status: ☒ All ☒ New ☒ Exported

Search

<< Previous Page

Showing Rows 1-3 of 29

Next Page >>

Matching Request Catalog Events:

ID	Cust#	Last Name	First Name	Address	Request Date	Export Status
10099		Smith	Bob	See Processing	01/12/11	New
11988	10078	Jones	Helen	See Processing	02/23/11	New
12334		Singh	Susan	See Processing	07/30/11	Exported

Back

[toolbar icons]

10.6 Processing

- Customer#
 - will only be available if the customer was logged in at the point of requesting a Catalog
 - if displayed, provide a link to the Customer Details screen
- Address:
 - Address-Line-1 + ", " + City/Town + ", " + State/Province

10.7 List Screen Actions

- - On "hover" will display a popup dialog that displays the "COMMENT" attribute

10.8 Export to CSV Function

- When executed on the List screen, all catalog requests displayed will be exported (regardless of export-status)
- When executed on the Detail screen, just one catalog request will be exported
- The Export is a simple CSV file creation, it should contain a "header row"

Column or ATTR_NAME	Header Row Caption
PRODUCT_STORE_ID	Product Store
CUST_REQUEST_ID	ID
CUST_REQUEST_DATE	Request Date
LAST_NAME	Last Name
FIRST_NAME	First Name
ADDRESS1	Address 1
ADDRESS2	Address 2
ADDRESS3	Address 3
CITY_TOWN	City or Town
STATE_PROVINCE	State or Province
ZIP_POST_CODE	Zip or Post Code
COUNTRY	Country
EMAIL_ADDRESS	Email Address
CONTACT_PHONE	Contact Phone
COMMENT	Comment
IS_DOWNLOADED	Is Downloaded
DATETIME_DOWNLOADED	Date Downloaded

- The CSV format should properly handle any embedded quotes or special characters so it can be exported to an EXCEL spreadsheet or used within a WORD mail-merge function
- All exported rows should reflect the download by updating the IS_DOWNLOADED and DATETIME_DOWNLOADED attributes
- The file should be called "Request-Catalog [date] [time].csv", for example:

Request-Catalog 2011-12-22 08:35:35.csv

10.9 Detail Screen

request catalog event detail

Request Catalog: 10099	Store: XYZ
ID: 10099 Last Name: Smith First Name: Robert Address 1: 1 Main Street Address 2: Apt #9b Address 3: City or Town: Some City or Town State or Province: Some State or Province Zip or Postcode: Some Zip or PostCode Country: CAN	

Email Address: robertsmith@somewhere.com

Contact Phone: 888-888-7777

Comment: I have an inquiry about an order I placed online last week. I still have not received the product even though you charged my credit card. Any help appreciated.

Export Status: Exported

Export Date: 01/01/11

Created Date: 12/31/10

Back

[toolbar icons]

11 Contact Us Events

11.1 Accessed From

- This function can be accessed from:
 - The navigation menu, search criteria will default as shown, rows will not be retrieved until the "Search" button is clicked
 - The Customer specific pages, Customer# is pre-filled as appropriate and the rows are auto-retrieved

11.2 Search Capability

- Last Name, contains
- From Date, CREATED_STAMP
- To Date, CREATED_STAMP
- Export Status, ATTR_NAME=IS_DOWNLOADED
N=New
Y=Exported
- From and To Date defaults
 - Both dates should be set to the current system date

11.3 OFBiz Mapping

- The contents of Contact Us form are stored in the CUST_REQUEST and CUST_REQUEST_ATTRIBUTE entities
- CUST_REQUEST_TYPE_ID = "RF_CONTACT_US"
 - ID CUST_REQUEST_ID
 - Product Store PRODUCT_STORE_ID
 - Customer# FROM_PARTY_ID
 - Last Name ATTR_NAME=LAST_NAME
 - First Name ATTR_NAME=FIRST_NAME
 - Contact Reason ATTR_NAME=CONTACT_US_REASON
 - Email Address ATTR_NAME=EMAIL_ADDRESS
 - Phone# ATTR_NAME=CONTACT_PHONE
 - Order# ATTR_NAME=ORDER_NUMBER
 - Comment ATTR_NAME=COMMENT

11.4 Sort Sequence


- Last Name

11.5 List Screen

contact us event list

Enter Search Criteria:

From Date: 

To: 

Customer#:

Last Name:

Export Status: ☒ All ☒ New ☒ Exported




Search

[<< Previous Page](#)

Showing Rows 1-3 of 29

[Next Page >>](#)

Matching Contact Us Events:

ID	Cust#	Last Name	First Name	Reason For Contact	Email Address	Contact Date	Export Status	
10099		Smith	Bob	Product Inquiry	bob@bob.com	01/12/11	New	
11988	10058	Jones	Helen	Sales	helen@abcplace.com	02/23/11	New	
12334		Singh	Susan	General	ssingh@micro.com	07/30/11	Exported	

Back

[toolbar icons]

11.6 Processing

- Customer#
 - will only be available if the customer was logged in at the point of Contact Us
 - if displayed, provide a link to the Customer Details screen

11.7 List Screen Actions

- - On "hover" will display a popup dialog that displays the "COMMENT" attribute

11.8 Export to CSV Function

- When executed on the List screen, all Contact Us events displayed will be exported (regardless of export-status)
- When executed on the Detail screen, just one Contact Us event will be exported
- The Export is a simple CSV file creation, it should contain a "header row"

Column or ATTR_NAME	Header Row Caption
PRODUCT_STORE_ID	Product Store
CUST_REQUEST_ID	ID
CUST_REQUEST_DATE	Contact Date
LAST_NAME	Last Name
FIRST_NAME	First Name
CONTACT_US_REASON	Contact Reason
EMAIL_ADDRESS	Email Address
CONTACT_PHONE	Contact Phone

ORDER_NUMBER	Order No
COMMENT	Comment
IS_DOWNLOADED	Is Downloaded
DATETIME_DOWNLOADED	Date Downloaded

- The CSV format should properly handle any embedded quotes or special characters so it can be exported to an EXCEL spreadsheet or used within a WORD mail-merge function
- All exported rows should reflect the download by updating the IS_DOWNLOADED and DATETIME_DOWNLOADED attributes
- The file should be called "Contact Us [date] [time].csv", for example:

Contact-Us 2011-12-22 08:35:35.csv

11.9 Detail Screen

contact us event detail

Contact Us: 10099	Store:
ID: 10099	
Last Name: Smith	
First Name: Robert	
Contact Us Reason: Billing Inquiry	
Email Address: robertsmith@somewhere.com	
Contact Phone: 888-888-7777	
Order#: WS10099	
Comment: I have an inquiry about an order I placed online last week. I still have not received the product even though you charged my credit card. Any help appreciated.	
Export Status: Exported	
Export Date: 01/01/11	
Created Date: 12/31/10	
Back	[toolbar]

12 Request a Quote Events

12.1 Accessed From

- This function can be accessed from:
 - The navigation menu, search criteria will default as shown, rows will not be retrieved until the "Search" button is clicked

12.2 Search Capability

- Last Name, contains
- From Date, CREATED_STAMP
- To Date, CREATED_STAMP
- Export Status, ATTR_NAME=IS_DOWNLOADED
N=New
Y=Exported
- From and To Date defaults
 - Both dates should be set to the current system date

12.3 OFBiz Mapping

- The contents of Request a Quote form are stored in the CUST_REQUEST and CUST_REQUEST_ATTRIBUTE entities
- CUST_REQUEST_TYPE_ID = "RF_REQUEST_QUOTE"
 - ID CUST_REQUEST_ID
 - Product Store PRODUCT_STORE_ID
 - Customer# FROM_PARTY_ID
 - Last Name ATTR_NAME=LAST_NAME
 - First Name ATTR_NAME=FIRST_NAME
 - Email Address ATTR_NAME=EMAIL_ADDRESS
 - Phone# ATTR_NAME=CONTACT_PHONE
 - SKU or Part ATTR_NAME=SKU_OR_PART
 - Comment ATTR_NAME=COMMENT



12.4 Sort Sequence

- Last Name

12.5 List Screen

request quote event list

Enter Search Criteria:

From Date:  To: 

Customer#:

Last Name:

Export Status: ☒ All ☒ New ☒ Exported




Search

<< Previous Page

Showing Rows 1-3 of 29

Next Page>>

Matching Request Quote Events:

ID	Cust#	Last Name	First Name	Email Address	Request Date	Export Status	
10099		Smith	Bob	bob@bob.com	01/12/11	New	
11988	10058	Jones	Helen	helen@abcplace.com	02/23/11	New	
12334		Singh	Susan	ssingh@micro.com	07/30/11	Exported	

Back

[toolbar icons]

12.6 Processing

- Customer#
 - will only be available if the customer was logged in at the point of Requesting a Quote
 - if displayed, provide a link to the Customer Details screen

12.7 List Screen Actions

- - On "hover" will display a popup dialog that displays the "SKU_OR_PARTS" attribute

12.8 Export to CSV Function

- When executed on the List screen, all Request Quote events displayed will be exported (regardless of export-status)
- When executed on the Detail screen, just one Request a Quote event will be exported
- The Export is a simple CSV file creation, it should contain a "header row"

Column or ATTR_NAME	Header Row Caption
PRODUCT_STORE_ID	Product Store
CUST_REQUEST_ID	ID
CUST_REQUEST_DATE	Contact Date
LAST_NAME	Last Name
FIRST_NAME	First Name
EMAIL_ADDRESS	Email Address
CONTACT_PHONE	Contact Phone
SKU_OR_PART	Sku or Part #'s
COMMENT	Comment

IS_DOWNLOADED	Is Downloaded
DATETIME_DOWNLOADED	Date Downloaded

- The CSV format should properly handle any embedded quotes or special characters so it can be exported to an EXCEL spreadsheet or used within a WORD mail-merge function
- All exported rows should reflect the download by updating the IS_DOWNLOADED and DATETIME_DOWNLOADED attributes
- The file should be called "Request Quote [date] [time].csv", for example:

Request Quote 2011-12-22 08:35:35.csv

12.9 Detail Screen

request quote event detail

Request Quote: 10099	Store:
ID: 10099	
Last Name: Smith	
First Name: Robert	
Email Address: robertsmith@somewhere.com	
Contact Phone: 888-888-7777	
SKU or Part: MF100001, MF100002, MF100003, ABC9876, ABC88888, ABC7888	
Comment: I did not see the above part numbers on your site. They are all for the Tronex manufacturer. I am hoping that you can get these parts for me.	
Export Status: Exported	
Export Date: 01/01/11	
Created Date: 12/31/10	
Back	[toolbar]

Customer Notes

13.1 Note List UI Guideline

customer notes

Customer PARTY05 Information	Store: XYZ
Standard Customer Information Box	

Customer Notes				
Note#	By	Date	Time	Note
10011	nrosser	01/09/12	1:00pm	Customer called to complain, has not yet received Order #10088
10023	dagarwal	01/07/12	3:00pm	Customer wanted to change order, but finally settled on what was originally order
10011	lshein	12/31/11	4:15pm	Customer called, had problems with web access
Back Add				[toolbar icons]

- Similar concept to adding Order Notes
 - see spec "[BF-Admin-Module-Orders.doc](#)"
- OFBiz mapping:
 - Extract from entities PARTY_NOTE and NOTE_DATA
 - Note# PARTY_NOTE.NOTE_ID, NOTE_DATA.NOTE_ID
 - By NOTE_DATA.NOTE_PARTY
 - Date NOTE_DATA.LAST_UPDATE_STAMP (date)
 - Time NOTE_DATA.LAST_UPDATE_STAMP (time)
 - Note NOTE_DATA.NOTE_INFO

13.2 Note Detail UI Guideline

customer note detail (PARTY05)

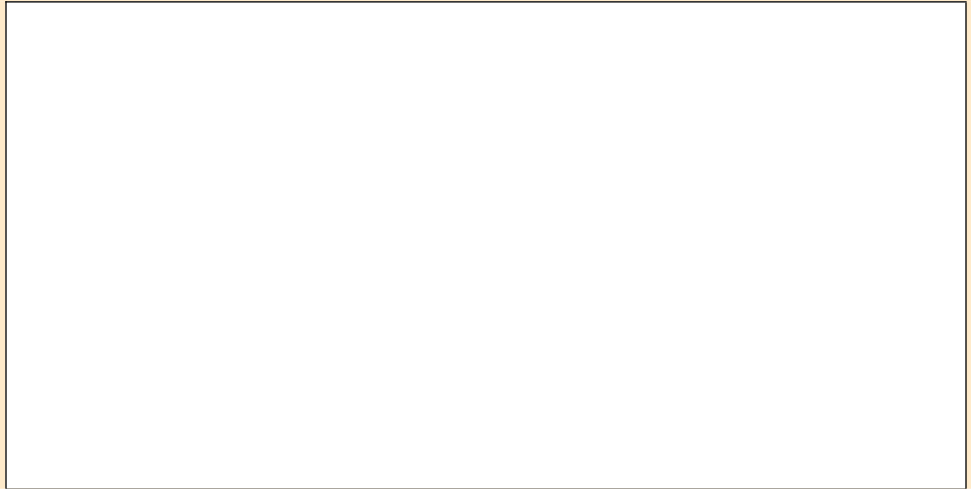
Customer PARTY05 Information	Store: XYZ
Standard Customer Information Box	

Note
Note#: 10099
Added By: lshein

Date: 12/3/11

Time: 11:37am

* Note:



Back

Save

[toolbar icons] |

- Validation
 - Note cannot be blank

14 Customer Website Activity

14.1 UI Guideline

customer website activity

Customer PARTY05 Information	Store: XYZ
Standard Customer Information Box (See above)	

Customer Website Activity			
Date	Time	Activity	Description
01/26/12	1:00pm	Registered	Registered 
01/26/12	1:01pm	Email Sent	Email Sent: Fashion House
02/12/12	3:03pm	Visit	Visit ID 10041 
02/12/12	3:15pm	Abandoned Cart	Shopping List 10909
02/12/12	3:19pm	Contact Us	Contact Us Event 
02/12/12	3:21pm	Request Catalog	Request Catalog Event 
02/15/12	2:06am	Email Sent	Email Sent: Abandoned Cart
02/16/12	10:11am	Order Placed	Order Placed: WS100077 for \$112.48
02/16/12	10:12am	Email Sent	Email Sent: #WS100077 Thank you for your order!!
02/19/12	8:00am	Order Status	Order Status: ORDER_COMPLETE, WS100077
02/22/12	02:22am	Email Sent	Email Sent: Review Products
02/23/12	9:13pm	Rating Posted	Rating Posted: Product #100546, AB-123, Red Blouse, 4 stars 
Back			[toolbar icons]

14.2 Processing

- This list provides a simple snapshot of all activity for the registered customer
- The basic functionality should:
 - retrieve all activities,
 - sort and display by date/time
 - assign a sequential # for each line
- All Activities must be for the active Product Store

14.3 Registered User

- Retrieve matching rows from the USER_LOGIN entity matching on USER_LOGIN_ID
- The Date/Time is derived from the CREATED_STAMP attribute
- Activity Description:
 - "Registered"

- Link Action:
 - Not Applicable
- Hover text:
 - Use attributes USER_LOGIN.USER_LOGIN_ID, USER_LOGIN.ENABLED and USER_LOGIN.HAS_LOGGED_OUT to derive the hover text

"Customer Registered. Login [USER_LOGIN_ID] is [ENABLED / DISABLED] and is currently [LOGGED IN / LOGGED OUT]"

14.4 Email Sent

- Retrieve matching rows from the COMMUNICATION_EVENT entity matching on PARTY_ID_TO
 - The Date/Time is derived from the ENTRY_DATE attribute
- Activity Description:
 - "Email Sent: " + COMMUNICATION_EVENT.SUBJECT
- Link Action:
 - Email Communication Detail Screen, see subsequent section
- Hover Text:
 - Not Applicable
 - **TECH NOTE: I'm concerned about performance for this. The COMMUNICATION_EVENT does not have any indexes that help us. DEV to advise – DO NOT CREATE ANY INDEXES WITHOUT TALKING TO NICK.**

14.5 Abandoned Cart

- Retrieve matching rows from the SHOPPING_LIST entity, join using PARTY_ID


```

select      last_updated_stamp
from        shopping_list
where       party_id = [CUSTOMER_NO]
and         shopping_list_type_id = 'SLT_SPEC_PURP'
```
- Activity Description:
 - "Abandoned Cart: Shopping List [SHOP_LIST_ID]"
- Link Action:
 - Abandoned Cart Detail Screen, see section in this spec
- Hover Text:
 - Not Applicable

14.6 Contact Us

- Retrieval

- See the "Contact Us Events" section for details
- Activity Description
 - "Contact Us Event"
- Link Action:
 - Contact Us Detail Screen, see section in this spec
- Hover Text:
 - See the "Contact Us Events" section for details

14.7 Request Catalog

- Retrieval
 - See the "Request Catalog Events" section for details
- Activity Description
 - "Request Catalog Event"
- Link Action:
 - Request Catalog Screen, see section in this spec
- Hover Text:
 - See the "Request Catalog Events" section for details

14.8 Order Placed

- Retrieve matching rows from the ORDER_HEADER entity:


```
select      oh.order_id, oh.entry_date, oh.grand_total
from        order_header oh, order_role orole
where       oh.order_id = orole.order_id
and         orole.party_id = [party-id]
and         orole.role_type_id = 'PLACING_CUSTOMER'
```
- Activity Description:
 - "Order Placed: " + ORDER_ID + " for " + GRAND_TOTAL
- Link Action:
 - Order Detail Screen, see spec "[*BF Admin Module Orders.doc*](#)"
- Hover Text:
 - Not Applicable

14.9 Order Status Changes

- TODO:
 - this will returns too many rows given the Status Codes that are logged in the ORDER_STATUS entity;
 - need to think through a better display.

- **NO DEV REQUIRED.**

- Retrieve matching rows from the ORDER_STATUS entity

```
select      oh.order_id, os.status_id, os.status_datetime,
            os.order_item_seq_id
from        order_header oh, order_role orole, order_status os
where       oh.order_id = orole.order_id
and         oh.order_id = os.order_id
and         orole.party_id = [party-id]
and         orole.role_type_id = 'BILL_TO_CUSTOMER'
```

14.10 **Visit**

- Retrieve matching rows from the VISIT entity matching on USER_LOGIN_ID
- Activity Description:
 - "Visit ID: " + [VISIT.VISIT_ID]
- Link Action:
 - Visit Detail Screen, see section in this spec
- Hover Text:

"Visit ID: " + [VISIT.VISIT_ID] + [cr] +
 "Initial Request: " + [VISIT.INITIAL_REQUEST]

14.11 **Rating Posted:**

- Retrieve matching rows from the PRODUCT_REVIEW entity:

```
select      pr.product_id, pr.status_id, pr.posted_date_time,
            pr.product_rating, pr_product_review,
            p.product_name, p.internal_name
from        product_review pr, product p
where       pr.product_id = p.product_id
and         pr.user_login_id = [user-login-id]
```

- Activity Description:
 - "Rating Posted: Product " + PRODUCT_ID + ", " + INTERNAL_NAME + ", " + PRODUCT_NAME + ", " + PRODUCT_RATING
 - If INTERNAL_NAME or PRODUCT_NAME is blank then remove the appropriate ", "
- Link Action:
 - Rating & Review Detail Screen, see "*BF Admin Module Rating & Review.doc*"
- Hover Text:
 - PRODUCT_REVIEW + " (" + STATUS_ID + ")"

15 Email Communication Detail

15.1 Detail Screen UI Guideline

email communication detail

Communication Event: 10041	
ID:	10041
From Email:	customerservice@client.com
To Email:	somecustomer@somewhere.com
Event Type:	EMAIL_COMMUNICATION
Status:	COM_COMPLETE
Date Started:	08/15/12 at 17:23:16
Date Complete:	08/15/12 at 17:23:17
From String:	customerservice@client.com
To String:	somecustomer@somewhere.com
CC String:	
BCC String:	
Subject:	FH.com: Thank you for your order!!
Content:	Thank for you for your order. We are working hard to fulfill and get this package shipped to you as quickly as possible. If you need any assistance please call us at the number below. Your Sincerely, Customer Service 1 (888) 123-4567
<div>Back</div> <div>[toolbar icons]</div>	


15.2 Technical Notes

- Most attributes are retrieved directly from the COMMUNICATION_EVENT
- From:
 - Use CONTACT_MECH_ID_FROM, join to CONTACT_MECH.CONTACT_MECH_ID where CONTACT_MECH_TYPE_ID = "EMAIL_ADDRESS"
 - Display INFO_STRING
- To:
 - Same as "From" above using CONTACT_MECH_ID_TO

16 Abandoned Cart Analysis

16.1 Abandoned Cart: UI Guideline

abandoned cart analysis

Enter Search Criteria				
From Date:	<input type="text" value="01/01/12"/>		To:	<input type="text" value="03/31/12"/>
<input type="button" value="Search"/>				

Matching Abandoned Cart Rows				
Month	Anonymous (Total)	Anonymous (With Items)	Reg Users (Total)	Reg Users (With Items)
Jan-2012	345	45	137	37
Feb-2012	547	47	287	23
Mar-2012	452	52	150	21
Apr-2012	947	47	290	17
May-2012	752	52	123	21
TOTAL	3043	243	987	119

16.2 Abandoned Cart: Processing

- From and To Date defaults
 - The dates should default to reflect the previous 3 complete months
 - For example:
 - Assume today's date is 12-Feb-2013
 - To Date is set to the last day of the previous month
 - To Date = 31-Jan-2013
 - From Date is set to the first day, three months prior
 - From Date = 1-Nov-2012
- Information is shown as per the UI Guideline:
 - All columns are "center aligned"
 - Totals available for each column
 - All counts are links, redirect to the Abandoned Cart List page
 - A count of 0 (ZERO) will NOT be linkable

16.3 Abandoned Cart: SQL

- Date Restrictions
 - Applies to ALL of the following SQL Select clauses
 - If the From-Date or To-Date has a valid entry then use as appropriate
 - Match against LAST_UPDATED_STAMP
- Total Counts
 - For anonymous user counts:

```

select          year(sl.last_updated_stamp),
                month(sl.last_updated_stamp),
                count(*)
from            shopping_list sl
where           sl.party_id is null
and             sl.shopping_list_type_id = 'SLT_SPEC_PURP'
group by        month(sl.last_updated_stamp), year(sl.last_updated_stamp)
order by        year(sl.last_updated_stamp), month(sl.last_updated_stamp)

```

- For Registered User Counts:

```

select          year(sl.last_updated_stamp),
                month(sl.last_updated_stamp),
                count(*)
from            shopping_list sl,
                party p
where           sl.party_id = p.party_id
and             sl.shopping_list_type_id = 'SLT_SPEC_PURP'
group by        month(sl.last_updated_stamp), year(sl.last_updated_stamp)
order by        year(sl.last_updated_stamp), month(sl.last_updated_stamp)

```

- Only if there are ITEMS:

- For anonymous user counts:

```

select          year(sl.last_updated_stamp),
                month(sl.last_updated_stamp),
                count(distinct (sl.shopping_list_id))
from            shopping_list sl,
                shopping_list_item sli
where           sl.party_id is null
and             sl.shopping_list_id = sli.shopping_list_id
and             sl.shopping_list_type_id = 'SLT_SPEC_PURP'
group by        month(sl.last_updated_stamp), year(sl.last_updated_stamp)
order by        year(sl.last_updated_stamp), month(sl.last_updated_stamp)

```

- For Registered User Counts:

```

select          year(sl.last_updated_stamp),
                month(sl.last_updated_stamp),
                count(distinct (sl.shopping_list_id))
from            shopping_list sl,
                shopping_list_item sli,
                party p
where           sl.party_id = p.party_id
and             sl.shopping_list_id = sli.shopping_list_id
and             sl.shopping_list_type_id = 'SLT_SPEC_PURP'
group by        month(sl.last_updated_stamp), year(sl.last_updated_stamp)
order by        year(sl.last_updated_stamp), month(sl.last_updated_stamp)

```

- Results from queries are to be combined in order to render the display as per the List UI Guideline screen above


- NOTE on LAST_UPDATED_STAMP Usage:
 - The "last_updated_stamp" is NOT modified if the user returns on a subsequent visit and updates the cart
 - The correct "last_updated_stamp" would be reflected on the SHOPPING_LIST_ITEM entity
 - For the initial implementation, matching against the SHOPPING_LIST entity is acceptable

16.4 Abandoned Products: UI Guideline

Abandoned Products (Anonymous and Registered Users)					
Product#	Item#	Name		No Of Carts	Total Qty
100001	A107	Green Fashion Dress		165	213
100002	B787	Fashion Denim Pants		143	175
100003	C888	Crocodile Handbag		105	452
100004	A198	Green Fashion Dress		88	89
100005	F822	Fashion Denim Pants		32	37
100006	F444	Crocodile Handbag		29	45

Back

16.5 Abandoned Products: Processing

- This visual component is to be displayed on the same page as the Abandoned Cart analysis
- Product:
 - Product ID links to the Product Detail Page
 - The more info  will display as per the Product List page
 - See spec "*BF Admin Module Catalog.doc*" for more information

16.6 Abandoned Products: SQL

- Overview
 - Abandoned Products are retrieved from the SHOPPING_LIST_ITEM table
 - Items may contain Virtual, Finished-Good or Variant products
 - Virtual and Finished-Good products are extracted and other attributes retrieved
 - Variant products are used to get information from the Virtual, and other attributes retrieved
 - Information from Virtual+Finished-Good is combined from the Virtual information retrieved from the Variant processing
- Date Restrictions
 - Applies to ALL of the following SQL Select clauses
 - If the From-Date or To-Date has a valid entry then use as appropriate
 - Match against LAST_UPDATED_STAMP
- SQL as follows:

```
// This section retrieves FINISHED_GOOD and VIRTUAL products
```

```

Select      sli.product_id, p.internal_name, et.text_data,
            count(*) no_of_carts, sum(sli.quantity) total_quantity
from        shopping_list_item sli,
            product p,
            product_content pc,
            content c,
            electronic_text et
where       sli.product_id = p.product_id
and        p.is_variant = 'N'
and        p.product_id = pc.product_id
and        pc.product_content_type_id = 'PRODUCT_NAME'
and        pc.content_id = c.content_id
and        c.data_resource_id = et.data_resource_id
group by   sli.product_id, p.internal_name, et.text_data

union

// This section retrieves VARIANT products, but links back to the VIRTUAL
// to get product descriptions
select      pa.product_id, p.internal_name, et.text_data,
            count(*) no_of_carts, sum(sli.quantity) total_quantity
from        shopping_list_item sli,
            product_assoc pa,
            product p,
            product_content pc,
            content c,
            electronic_text et
where       sli.product_id = pa.product_id_to
and        pa.product_assoc_type_id = 'PRODUCT_VARIANT'
and        pa.product_id = p.product_id
and        pa.product_id = pc.product_id
and        pc.product_content_type_id = 'PRODUCT_NAME'
and        pc.content_id = c.content_id
and        c.data_resource_id = et.data_resource_id
group by   pa.product_id, p.internal_name, et.text_data

order by no_of_carts desc

```

17 Abandoned Cart List

abandoned cart list

Enter Search Criteria		
From Date:	<input type="text" value="01/01/12"/>	<input type="text" value="05/31/12"/>
Anonymous Users:	<input type="radio"/> Carts with Items <input type="radio"/> All <input checked="" type="radio"/> None	
Registered Users:	<input checked="" type="radio"/> Carts with Items <input type="radio"/> All <input type="radio"/> None	
<input type="button" value="Search"/>		

Matching Abandoned Cart Rows						
Cart ID	Last Updated	Cust#	Last Name	First Name	# Items in Cart	Total Qty in Cart
100001	09/10/2012		Anonymous		1	17
100022	09/11/2012	100254	Smith	Robert	0	0
100245	09/12/2012		Anonymous		2	2
100876	09/13/2012	100544	Jones	Helen	2	4
100904	09/13/2012		Anonymous		0	0
<input type="button" value="Back"/>						

17.1 Processing

- Accessed from Abandoned Cart Analysis screen
 - Pre set dates as appropriate
 - Pre set radio-buttons as appropriate
 - Auto-retrieve data
- Cart ID
 - Links to Abandoned Cart Detail page, passing the Cart ID (SHOPPING_LIST_ID)
- Cust#
 - Links to the Customer Detail Page, passing the PARTY_ID
- Items in Cart
 - Displays a count of ROWS in the SHOPPING_LIST_ITEM entity
- Total Qty in Cart
 - Displays a sum of QUANTITY in the SHOPPING_LIST_ITEM entity
- Paging
 - Normal BF paging applies, see spec "*BF Admin Module General.doc*" for more information

18 Abandoned Cart Detail

18.1 UI Guideline

abandoned cart detail

Customer PARTY05 Information				Store: XYZ
Standard Customer Information Box (See above)				

Abandoned Cart Items for Cart 10098				
Line	Product#	Item#	Name	Qty
1	25191	A107	Green Fashion Dress	1
2	24462	B787	Fashion Denim Pants	1
3	24777	C888	Crocodile Handbag	10

18.2 Processing

- Line Items are retrieved from the SHOPPING_LIST_ITEM entity

19 Visit Detail Page

19.1 Visit UI Guideline

visit detail

Customer PARTY05 Information	Store: XYZ
Standard Customer Information Box (See above)	

Visit: 10041
Visit ID: 10041
Date/Time: 12/3/11 at 11:37am
Login ID: nrosser@salmonllc.com
Server IP Address: 10.182.198.142
Server Host Name: GMH_PRODUCTION
Initial Request: http://www.goldmedalhair.com/gmh/control/main
Initial Referrer:
Initial User Agent: Mozilla/5.0 (Windows NT 5.1) Gecko/20100101 Firefox/10.0
Client IP Address: 206.217.94.66
Client Host Name: 206.217.94.66

[Back](#)

19.2 Technical Notes

- Most attributes are retrieved directly from the VISIT table