



BF Admin Module Manage Email.doc

Last Updated: 19-Nov-2013

TABLE OF CONTENTS

<u>1</u>	<u>Modification History</u>	3
<u>2</u>	<u>Manage Email</u>	4
2.1	List Screen	4
2.2	References	4
<u>3</u>	<u>Email Templates</u>	5
3.1	Technical Note	5
3.2	List Screen	5
3.3	Detail Screen	6
<u>4</u>	<u>Email Configuration</u>	8
4.1	Technical Note	8
4.2	List Screen	8
4.3	Detail Screen	8
4.4	Technical Note	10
<u>5</u>	<u>Text Message Templates</u>	11
5.1	Technical Note	11
5.2	List Screen	11
5.3	Detail Screen	11
<u>6</u>	<u>Email Parameters</u>	13
6.1	Processing	13

1 Modification History

Date	Who	Comments
24-Aug-11	Solveda	Split from "BF Admin Module Admin" document
17-Oct-12	Solveda	Links to "Email Test" component
26-Feb-13	Solveda	Added text messaging capability
9-Oct-13	Solveda	Ability to add a new Email or TXT template
19-Nov-13	Solveda	Added "status" to email Configuration
4-Apr-14	Solveda	Added "File vs Embedded" content

2 Manage Email

2.1 List Screen

manage email and text messages

Manage Email	
Function	Description
Email Templates	Manage Email Templates that are used in all outgoing emails
Email Configuration	Manage the "From", "To" and other attributes of outgoing emails
Text Message Templates	Manage Text Messaging Templates used in notifications to cell phones
Email Parameters	Standard parameters used primarily for styling the email content

Back

2.2 References

- Also see spec "[*BF Email.doc*](#)"

3 Email Templates

3.1 Technical Note


- OFBiz Entity:
 - CONTENT
 - Content-ID = E_XXXXX
 - Content-Type-ID = BF_EMAIL_TEMPLATE
- **Note:** see the "*BF-Admin-Module-Content.doc*" spec for details on managing the separation of content by PRODUCT_STORE

3.2 List Screen

email templates list

Email Templates					
Content ID	Email Name	Status	Description	Active Date	Created Date
E_COMMON_STYLES	Common Styling	Active	This is the generic styling for all emails.	08/01/11	07/27/11
E_COMMON_HEADER	Common Header	Active	This is the standard header definition for all outgoing emails.	08/02/11	07/27/11
E_COMMON_FOOTER	Common Footer	Active	This is the standard footer definition for all outgoing emails.	08/02/11	07/29/11
E_NEW_CUSTOMER	New Customer	Active	New user email that is sent whenever a new customer registers at your site.	08/03/11	08/01/11
E_FORGOT_PASSWORD	Forgot Password	Active	Sent when a customer clicks on the "Forgot Password" link	08/03/11	08/01/11
E_REQUEST_CATALOG	Request Catalog	Active	Request Catalog	08/03/11	08/02/13
E_ETC	Another Email	Active	Email Etc	08/03/11	08/02/12

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

- Sort Sequence: Content ID
- Clicking on the "Content ID" link will pass control to the Detail Screen
- "Add Template"
 - Redirect to the Detail Screen in "add" mode
- Action 
 - Tooltip is "Test Email"
 - This will pass control to the Email Test function as described in the spec "*BF Admin Module Tools.doc*"

3.3 Detail Screen

email templates detail

Content Detail: EMAIL_CHANGE_CUSTOMER	
Content ID:	EMAIL_CHANGE_CUSTOMER
Name:	<input type="text" value="Change Customer email"/>
Description:	<div>Sent whenever your customers update their personal profile.</div> <div>* 255 character limit (n characters left)</div>
Type:	<input checked="" type="radio"/> Embedded <input type="radio"/> File Reference
Content:	<div><html> <some tag> </some tag> </html></div>
Created Date:	07/27/11 at 9:00am
Status:	Active <input type="button" value="Set to Inactive"/>
Active Date:	08/01/2011 at 3:00pm
<div><input type="button" value="Back"/> <input type="button" value="Save"/></div>	

- Add Mode
 - "Content ID" is an editable field
 - Must conform to an "ID", see spec "*BF Admin Module General.doc*"
- Characters left countdown
 - Description is limited to 255 characters
- Embedded vs File Reference
 - See spec "*BF Admin Module Content*" for processing rules
- "Save" message. "Your changes to [email-name] have been saved"
- "Back", return to List Screen
- Validation:
 - Name cannot be blank
 - Error: "The Name field cannot be blank"
 - Description cannot be blank

- Error: "The Description field cannot be blank"
- Email Content cannot be blank
 - Error: "The Email Content field cannot be blank"




4 Email Configuration

4.1 Technical Note


- OFBiz Entity
 - PRODUCT_STORE_EMAIL_SETTING
 - ENUMERATION, ENUM_TYPE_ID = PARTY_EMAIL
- Multi-Store Consideration:
 - For "Multi Store" implementations, the maintenance of the Email Configurations file needs to consider the "active store"

4.2 List Screen

email configuration list

Email Configuration					
Email Type	Status	Description	Subject	From	
PRDS_CUST_REGIST	Active	Customer Registration	Client.com: Thank you	csr@client.com	
PRDS_ABD_CART	Active	Abandoned Cart	Check your cart!	csr@client.com	
ETC	Active	ETC	etc!	etc@client.com	

Back

- Sort Sequence: Email Type
- Action 
 - This will provide additional information as well as indicate which templates are associated with the configuration item
 - Users may click on an email-template, this will pass control to the appropriate email template detail screen
 - Example:

CC: csr-copy@client.com
BCC: csr-blind@client.com

Email Templates Used:
E_HEADER
E_ORDER_DETAIL
E_FOOTER

4.3 Detail Screen

email configuration detail

Email Detail: Customer Registration

Email Type:	PRDS_CUST_REGISTER		
Description:	<input type="text" value="Customer Registration"/>		
	* 255 character limit (n characters left)		
Subject:	<input type="text" value="Client.com: Thank you for registering!"/>		
From:	<input type="text" value="custserv@client.com"/>		
CC:	<input type="text" value="ccnotify@client.com"/>		
BCC:	<input type="text" value="bccnotify@client.com"/>		
Created Date:	07/27/11 at 9:00am		
Status:	Active	<input type="button" value="Set to Inactive"/>	
Active Date:	08/01/2011 at 3:00pm		
	<input type="button" value="Back"/>	<input type="button" value="Save"/>	

- Characters left countdown
 - Description is limited to 255 characters
- "From" must be a valid format email
- "CC" and "BCC" fields can contain multiple email addresses by using a "," separator. All email addresses should be properly formatted emails.
- "Save" message. "Your changes to [email-name] have been saved"
- "Back", return to List Screen
- Validation:
 - From:
 - Must be a valid email address: "The FROM field must contain a valid email address"
 - Can only be ONE address: "The FROM field can only contain a single email address"
 - CC valid format emails
 - Error: "The CC field must contain valid email addresses. You can use the "," separator for multiple email addresses"
 - BCC valid format emails
 - Error: "The BCC field must contain valid email addresses. You can use the "," separator for multiple email addresses"
 - From cannot be blank
 - Error: "The From field cannot be blank"
 - Subject cannot be blank
 - Error: "The Subject field cannot be blank"

4.4 Helper Text

- For "CC" and "BCC":
 - "To enter multiple emails use a comma (,) delimiter"

4.5 Technical Note

- To accommodate the Active/Inactive a custom extension will be added to the Ofbiz Entity PRODUCT_STORE_EMAIL_SETTING:
 - STATUS_ID [related to STATUS_ITEM.CONTENT_STATUS]








5 Text Message Templates

5.1 Technical Note


- OFBiz Entity:
 - CONTENT
 - Content-ID = TXT_XXXXX
 - Content-Type-ID = BF_TXT_TEMPLATE
- **Note:** see the *BF-Admin-Module-Content* spec for details on managing the separation of content by PRODUCT_STORE

5.2 List Screen

text message templates list

Text Message Templates						
Content ID	Text Name	Status	Description	Active Date	Created Date	
TXT_ABANDON_CART	Abandoned Cart	Active	Abandoned Cart Text Message template	08/01/11	07/27/11	
TXT_NEW_CUSTOMER	New Customer	Active	New Customer Text Message template	08/02/11	07/27/11	
TXT_ORDER_CHANGE	Order Change	Active	Order Change Text Message template	08/02/11	07/29/11	
TXT_ORDER_CONFIRM	Order Confirm	Active	Order Confirm Text Message template	08/03/11	08/01/11	
TXT_FORGOT_PASSWORD	Forgot Password	Active	Forgot Password Text Message template	08/03/11	08/01/11	
TXT_SHIP_REVIEW	Review	Active	Review Text Message template	08/03/11	08/02/13	
TXT_CHANGE_CUSTOMER	Change Customer	Active	Change CustomerText Message template	08/03/11	08/02/12	

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

- Sort Sequence: Content ID
- Clicking on the "Content ID" link will pass control to the Detail Screen
- "Add Template"
 - Redirect to the Detail Screen in "add" mode
- Action 
 - Tooltip is "Test Text Message"
 - This will pass control to the Text Test function as described in the spec "*BF Admin Module Tools.doc*"

5.3 Detail Screen

text message templates detail

Content Detail: TXT_ORDER_CONFIRM	
Content ID:	TXT_ORDER_CONFIRM
Name:	<input type="text" value="Order Confirm"/>
Description:	<input type="text" value="Order Confirm Text Message"/> <small>* 255 character limit (n characters left)</small>
Type:	<input checked="" type="radio"/> Embedded <input type="radio"/> File Reference
Content:	<input type="text" value="Your Order {\$ORDER_NO} is confirmed for {\$TOTAL_AMOUNT}"/> <small>* 160 character limit (n characters left)</small>
Created Date:	07/27/11 at 9:00am
Status:	Active <input type="button" value="Set to Inactive"/>
Active Date:	08/01/2011 at 3:00pm
<input type="button" value="Back"/> <input type="button" value="Save"/>	

- Add Mode
 - "Content ID" is an editable field
 - Must conform to an "ID", see spec "[BF Admin Module General.doc](#)"
- Characters left countdown
 - Description is limited to 255 characters
- Embedded vs File Reference
 - See spec "[BF Admin Module Content](#)" for processing rules
- "Save" message. "Your changes to [email-name] have been saved"
- "Back", return to List Screen
- Validation:
 - Name cannot be blank
 - Error: "The Name field cannot be blank"
 - Description cannot be blank
 - Error: "The Description field cannot be blank"
 - Email Content cannot be blank
 - Error: "The Email Content field cannot be blank"

6 Email Parameters

6.1 Processing

- This will provide a redirect to the general BigFish Parameter screen
 - See the "BigFish Parameters" section in the spec "*BF Admin Module Tools.doc*"