BF Admin Module Promotions.doc

Last Updated: 17-Sep-2012

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1   Modification History

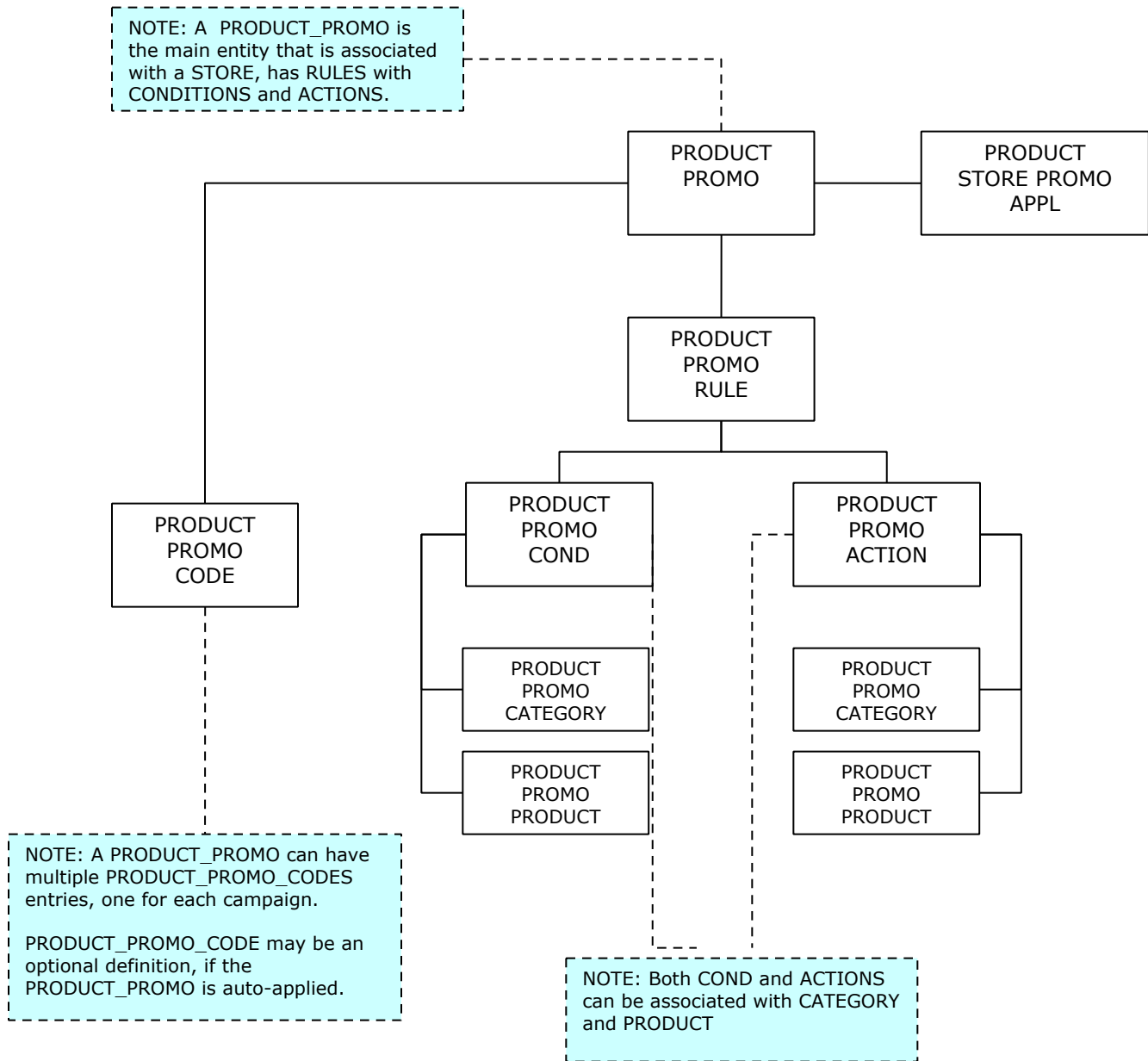| Date	Who	Comments
24-Aug-11	Salmon	Split from initial "BF Admin Module" document, refer to this document for general concepts, processing and prior modification history.
6-Dec-11	Salmon	Added a link from "usages" to the Order List screen
19-Dec-11	Salmon	Added Promo Description to the list
27-Dec-11	Salmon	Requirements for Promo Detail and Add a Promo
5-Jan-12	Salmon	Modifications based on review with LS
9-Jan-12	Salmon	Minor clarifications on Promotions (Rules: Actions)
23-Feb-12	Salmon	Main Promotion List screen: (1) suppress repeating data for a Promotion; (2) modified row-striping
7-Aug-12	Salmon	Hide / show the include/exclude Product and Category selectors if not appropriate.
8-Aug-12	Salmon	When selecting Categories, always default to "include sub-categories". Added Helper Text.
17-Sep-12	Salmon	Ability to delete Promo-Code or entire Promotion. Ability to limit a Promotion to a Shipping Method. Default FROM_DATE to current system date for new promo entities.

promotions

View Promotions	Add Promotion
This function provides the ability to view promotions, add a PROMO-CODE to a PROMOTION and gauge usage.	

3   Overview

3.1   OFBiz Promotions: Visual Guide

NOTE: A PRODUCT_PROMO is the main entity that is associated with a STORE, has RULES with CONDITIONS and ACTIONS.

PRODUCT PROMO

PRODUCT STORE PROMO APPL

PRODUCT PROMO RULE

PRODUCT PROMO CODE

PRODUCT PROMO COND

PRODUCT PROMO ACTION

PRODUCT PROMO CATEGORY

PRODUCT PROMO PRODUCT

PRODUCT PROMO CATEGORY

PRODUCT PROMO PRODUCT

NOTE: A PRODUCT_PROMO can have multiple PRODUCT_PROMO_CODES entries, one for each campaign.

PRODUCT_PROMO_CODE may be an optional definition, if the PRODUCT_PROMO is auto-applied.

NOTE: Both COND and ACTIONS can be associated with CATEGORY and PRODUCT

3.2 OFBiz Promotions: Overview

- Within OFBiz a promotion is essentially split into several entities:

    - Promotion definition:
        - this defines the Promotion at a high level
        - for example "TEN_PCT_OFF"
        - OFBiz Entity: PRODUCT_PROMO

    - Promotion associated with a Store
        - OFBiz Entity: PRODUCT_STORE_PROMO_APPL

    - Rules definition:
        - this defines the rules for the Promotion
        - rules include "conditions" (e.g. must spend more than $20)
        - rules include "actions" (e.g. 10% off)
        - OFBiz Entity: PRODUCT_PROMO_RULE, PRODUCT_PROMO_COND and PRODUCT_PROMO_ACTION

    - Category and Product definitions:
        - these can be defined within both the Rules "conditions" and "actions"
        - OFBiz Entity: PRODUCT_PROMO_CATEGORY and PRODUCT_PROMO_PRODUCT

    - Promo Code definition:
        - this is the actual promo-code that is entered within the eCommerce implementation (e.g. XMAS_TEN_OFF)
        - OFBiz Entity: PRODUCT_PROMO_CODE

- This structure allows for a Promotion, with Rules, to be defined once – and then have many Promo-Codes for each specific campaign

3.3 Terminology

- **PROMOTION**: used when discussing PRODUCT_PROMO and related entities (PRODUCT_STORE_PROMO_APPL, PRODUCT_PROMO_RULE, PRODUCT_PROMO_COND, PRODUCT_PROMO_ACTION)

- **PROMO_CODE**: used when discussing a specific PRODUCT_PROMO_CODE associated with a PRODUCT_PROMO

4   View Promotions

4.1   Search Capability

- Promotion Name,   contains
- Promotion Description,   contains
- Promo Code,   contains
- Active (default checked)
- Inactive (default NOT checked)

NOTE: The Active/Inactive selection criteria needs to consider the FROM/THRU dates on **both** the PRODUCT_STORE_PROMO_APPL and PRODUCT_PROMO_CODE entities.

4.2   List

Caption	DB	Comment
Promotion Name	PRODUCT_PROMO.PROMO_NAME	Left-aligned
Promotion Description	PRODUCT_PROMO.PROMO_TEXT	Left-aligned
Promotion Active From	PRODUCT_STORE_PROMO_APPL.FROM_DATE	Centered
Promotion Active Thru	PRODUCT_STORE_PROMO_APPL.THRU_DATE	Centered
Promotion Status	Active / Inactive	Centered
🔲	Add a new PRODUCT_PROMO_CODE	Centered
Promo Code	PRODUCT_PROMO_CODE.PRODUCT_PRODUCT_ID	Left-aligned
Promo Code Active From	PRODUCT_PROMO_CODE.FROM_DATE	Centered
Promo Code Active Thru	PRODUCT_PROMO_CODE.THRU_DATE	Centered
Promo Code Status	Active / Inactive	Centered
Usages	**# of times this Promo-Code (or Promotion) was used on an order (can we use TOP_PROMOTIONS?)**	Centered

🔲 Tooltip example reads "Add a new PROMO-CODE for FIFTEENOFF"

4.3   Sort Sequence

- Promo Code

4.4   Visual Guideline

view promotions

Enter Search Criteria:

Promotion Name:	[ ]	Promotion Description:	[ ]
Promo Code:	[ ]		

Status: ☐ All ☑ Active ☐ Inactive

Search

Matching Promotions

PROMOTION DEFINITION					PROMO-CODES					
Name	**Description**	**Active From**	**Active Thru**	**Status**	**Promo Code**	**Active From**	**Active Thru**	**Status**	**Usages**	
FIFTEENOFF	15% Off	4/1/11	8/31/11	Active	15PCTOFF	4/1/11	8/31/11	Active	45	⊞
					MEMDY15	10/1/11	11/1/11	Active	12	⊞
FREESHIP50	Free Shipping, more than $50	1/31/11	8/31/11	Active	FSHP50	1/31/11	1/31/11	Active	10	⊞
					FFIFTY	2/1/11	2/28/11	Active	6	⊞
					F50	3/1/11	3/31/11	Active	7	⊞
NICKPROMO	Nick Promo, Auto Applied	1/1/11	12/31/12	Active					0	⊞
TENOFF	Ten Percent Off	2/1/11	5/1/11	Active	10POFF	2/1/11	5/1/11	Inactive	17	⊞
					MEM10	3/1/11	10/1/11	Active	12	⊞

Back   **Add Promotion**

- Grouping by Promotion and Row Striping
  - Repeating data in the Promotions section is suppressed
  - Row striping is used to group together a Promotion (for one or more Promo Codes)

- Link / Button Actions:

  - "Promotion Name" link:
    - redirect to the "manage promotion" screen (in edit mode)

  - "Add Promotion" button:
    - redirect to the "manage promotion" screen (in edit mode)

  - "Promo Code" link:
    - redirect to the Promo Code Management screen (in edit mode)

  - "Add Promo Code" Icon:
    - redirect to the Promo Code Management screen (in add mode)

  - "Usages" link:
    - redirect to the Order List page and auto-display all matching orders

5   Manage Promotion

5.1   Accessed From

- Promotion List Page

- Link from Order-Detail by Promo-Code

5.2   Visual Guideline: Manage Promotion

- the page display will include all display components (Promotion / Conditions / Actions / Category-Product criteria) on a single page

manage promotion

Promotion Definition		
Promotion ID:	10099	
Promotion Name:	TEN_PCT_OFF	
Promotion Desc:	Ten Percent off regardless of cart-total	
Required Code:	O Automatically apply ● Customer has to manually enter	
Limit Per Order: 100	Limit Per Customer: 1	Limit Per Promotion: 999
User Entered: Y	Show to Customer: Y	
Active From:	Active Thru:	

- Notes:
  - Required Code translates to N (auto) or Y (manual)
  - User-Entered and Show-to-Customer are always set to "Y", read only
  - The Active-From / Active-Thru are stored on the OFBiz entity PRODUCT_STORE_PROMO_APPL entity

- Defaults for new entry:
  - Limit Per Order: 1
  - Limit Per Customer: 1
  - Limit Per Promotion: 999
  - Active From: current system-date

- Validation:
  - Promotion Name cannot be blank
  - Promotion Desc cannot be blank
  - Limit Per Order is a required field and must have a numeric value of 1 to 99. Hover over the Helper icon for more information

- Helper Text

- Limit Per Order: The total number of times a specific Promo can be applied to an Order. Remember that some promos are applied at the cart Product level. If a Promo is allowed to be applied to multiple Product line items then this should be set accordingly. Otherwise, and in most cases, this should be set to 1.

- Limit Per Customer: The total number of times a specific Promo can be applied for a Customer. Remember that some promos are applied at the cart Product level. If a Promo is allowed to be applied to multiple Product line items then this should be set accordingly.

- Limit Per Promotion: the total number of times a Promotion can be used. This will be the sum of the child Promo-Codes usage.

5.3 Visual Guideline: Rules -> Conditions

Rules: Conditions			
Condition:	Condition-Drop-Down		
Operator:	Operator-Drop-Down		
Value:	0		
Categories:	Include	Electronics	Remove
	Include	Appliances	Remove
	Op-Drop-down	Select	
Products:	Op-Drop-down	Select	
Shipping Method:	Shipping Method drop-down		

- *Technical Note: if Categories are selected, the attribute "PRODCUST_PROMO_CATEGORY. INCLUDE_SUB_CATEGORIES" should be set to "Y"*

- The Condition-Drop-Down has the following values and relationship with other attributes:

Drop Down Value	Operator Allow	Value	Category		Product
Cart Sub Total	All	Show, required	Hide		Hide
Total Amount of product	All	Show, required	Show At least one required	OR	Show At least one required
X Amount of Product	All	Show, required	Show, one required	OR	Show At least one required
X Quantity of Product	All	Show, required	Show, one required	OR	Show At least one required
Shipping Total	All	Show, required	Hide		Hide

- The Condition-Drop-Down will default to "Cart Sub Total"

- The Operator-Drop-Down has the following values:

- o Is
- o Is Not
- o Is Less Than
- o Is Less Than or Equal To
- o Is Greater Than
- o Is Greater Than or Equal To

- ■ The Operator-Drop-Down will default to "Is Greater Than"

- ■ For "Categories" and "Products" selectors:

  - o The Op-Drop-Down has the following values:
    - ▪ Include
    - ▪ Exclude
    - ▪ Default value is "Include"

  - o If categories/products have not currently been selected:
    - ▪ offer the drop-down and a "Select" button
    - ▪ as illustrated above by "Products"

  - o If categories/products have already been specified:
    - ▪ Display the "Remove" helper button for current items, this will remove them from the display
    - ▪ Display an open line, that will allow for the addition of another item
    - ▪ As illustrated above by "Category"

  - o On page "Save":
    - ▪ Remove any duplicates
    - ▪ delete all PRODUCT_PROMO_CATEGORY and PRODUCT_PROMO_PRODUCT rows
    - ▪ insert newly defined rows

  - o The "Select" button, when used for Categories:
    - ▪ will "popup" a list of available categories and sub-categories
    - ▪ see *BF-Admin-Module-Catalog* for details of the Generic Category Selector
    - ▪ when a new Category is appended to the list, an additional "select" row will be made available for additional selections

  - o The "Select" button, when used for Products:
    - ▪ will "popup" a list of available products
    - ▪ see *BF-Admin-Module-Catalog* for details of the Generic Product Selector
    - ▪ when new Product(s) are appended to the list, an additional "select" row will be made available for additional selections

- ■ The "Shipping Method" selector:

  - o Shipping Method drop-down should ONLY be displayed if the "Action" is "Shipping Total"
  - o The drop-down should offer all available Shipping Methods, displaying the Shipping Method ID and Description

5.4 Visual Guideline: Rules -> Actions

Rules: Actions

Action:	Action-Drop-Down
Qty:	0 Amount:
Categories:	Op-Drop-down Select
Products:	Include SONY 52" Television Remove
	Include SONY 40" Television Remove
	Op-Drop-down Select

- *Technical Note: if Categories are selected, the attribute "PRODCUST_PROMO_CATEGORY. INCLUDE_SUB_CATEGORIES" should be set to "Y"*

- When the user selects the Action-Drop-Down value, the display of Qty and Amount can hide/show as appropriate (the actual "captions" needs to change dynamically as shown):

Drop Down Value	Qty	Amount	Category		Product
Gift with Purchase	Show, required Caption: Qty	Hide	Show, optional		Show, required
X Product for Y% Discount	Show, required Caption: Min#	Show, required Caption: Disc%	Show, one required	OR	Show, one required
X Product for Y Discount	Show, required Caption: Min#	Show, required Caption: Disc n	Show, one required	OR	Show, one required
X Product for Y Price	Show, required Caption: Min#	Show, required Caption: Price	Show, one required	OR	Show, one required
Order Percent Discount	Hide	Show, required Caption: Disc%	Hide		Hide
Order Amount Flat	Hide	Show, required Caption: Price	Hide		Hide
Product for [Special Promo] Price	Hide	Show, required Caption: Price	Show, one required	OR	Show, one required
Shipping X% Discount	Hide	Show, required Caption: Ship Disc%	Hide		Hide
Tax % Discount	Hide	Show, required Caption: Tax Disc%	Hide		Hide

- Gift-with-Purchase*:*
  - ○ Standard Product "picker" should be used. Change caption to "Product:"; hide the include/exclude option; only ONE product can be selected
  - ○ *Tech Note*: Gift-with-Purchase: In OFBiz out-of-the-box, the Product is specified in an entry field called "Item#". BigFish will use the Product picker component, may require special mapping.

- Product for [Special Promo] Price **TODO**
  Email from Len 22-Oct:

Deepak,

The product Special promo price is available in BF Admin Promotions, however we have never had any requirements to configure it as of yet□Currently we are requiring a 'price' in the admin promotion action rules, but this is incorrect and is not used□You can use the BF promotion rules to configure the promotion and webtools to configure the special promo product price if this is an immediate requirement.
□
The way the special promo price works is based on the product price configuration□I was able to configure FH DEV in the following manner to get it to work.

BF Admin:
Promotion: order Test Code: ORDERPROMO
Condition:
Cart Sub Total > 0
Action:
Product for [Special Promo] Price
Price: 20
Product: 3-4 Sleeve & Button Down [100006] (Virtual)
□
Webtools
Catalog/Product
Go to Virtual Product [100006]
Prices:
Price Type: Special Promo Price
Purpose: Purchase/Initial
Product Store Group: Not Applicable
From Date: 2014-10-22
Price: **40**
□
eCommerce:
Add to Cart: Variant of product [100006] 3-4 Sleeve & Button Down
Sign In
View Cart
Add Promo Code To Cart: ORDERPROMO
□
Offer Price of $40.00 is given to the item (The $20 in promotion action is not used)□You can also configure a specific/different Special Promo price directly on a Variant.
□
Nick,
We would need the following changes to implement in BF.
Modify Promotion Actions removing 'price' requirement.
Add Special Promo Price in Admin Product Detail and XML product load

- The Action Categories and Products can be used for each of the action types to Include or Exclude either a single product or all products in a category

- For example:

  o If the client wanted to give %50 discount on all products in the Synthetic Wigs category if the cart total is > 0 then in the promotion rules you need only 'Include' the Synthetic Wigs as the action category

- For the 'Product' action types one from either the Action Categories or Action Products is 'required'☐For the other action types the Action Categories/Products are used more as conditionals on the action

- Note: Only the Gift With Purchase uses the item ID column

- For "Categories" and "Products" selectors
  - This will operate in the same way as "Rules: Conditions"

- Validation
  - Validate all required fields. Error message "Field [xxx] is required, please retry". Note that [xxx] should reflect the caption as defined in the table above
  - % must be a valid number between 1 and 100
  - Numeric fields must be valid numbers, between 1 and 9999

5.5   Visual Guideline: Promo Codes

Promo Codes								
Promo Code	**User Entered**	**Limit Per Code**	**Limit Per Customer**	**Active From**	**Active Thru**	**Status**	**Usages**	
XMAS10	Y	100	1	12/1/11	12/31/11	Active	10	
TENOFFWEB	Y	250	1	2/1/11	5/1/11	Inactive	17	
TENOFF	N	250	3	4/1/11	8/31/11	Active	45	
MEMDAY10	Y	100	1	3/1/11	10/1/11	Active	12	
FESTIVAL10	Y	50	1	10/1/11	11/1/11	Active	12	

- The PROMO-CODES display is ONLY displayed when managing an EXISTING PROMOTION (if adding a NEW PROMOTION, this component will NOT be displayed)

- Link / Button Actions:

  - "Promo Code" link:
    - redirect to the Promo Code Management screen (in edit mode)

  - "Add Promo Code" Icon:
    - redirect to the Promo Code Management screen (in add mode)

Back   **Save**

- Save
  - Validate as appropriate
  - Save as appropriate

promo code detail

Promotion Definition		
Promotion ID: 10099		
Promotion Name: TEN_PCT_OFF		
Promotion Desc: Ten Percent off regardless of cart-total		
Required Code: O Automatically apply ● Customer has to manually enter		
Limit Per Order: 100	Limit Per Customer: 1	Limit Per Promotion: 999
User Entered: Y	Show to Customer: Y	
Active From: 1/10/10	Active Thru: 1/10/15	

- The Promotion Definition section is the same as above, all attributes are read-only

Promo Code Definition		
Promotion Code: XMAS10		
Limit Per Code: 250	Limit Per Customer: 2	User Entered: O Yes ● No
Active From:	Active Thru:	

Back   **Delete**   **Save**

- Defaults for new entry:
  - o   Active From: current system-date

- Delete:
  - o   Validation should be performed to ensure that there are no usages or other references (**Dev to advise so the message can be made clearer**) to this Promo Code. If there are, display error:

    "The Promo-Code [XMAS10] has been used or has references that mean it cannot be deleted"

- Validation:
  - o   The Promotion Code is subject to the same validation as standard ID attributes
  - o   See spec "*BF Admin Module General.doc*"

- Helper Text

- Limit Per Code: The total number of times a specific Promo can be applied. Also consider the Limit-Per-Promotion setting on the Promotion.

- Limit Per Customer: The total number of times a specific Promo can be applied for a Customer. Remember that some promos are applied at the cart Product level. If a Promo is allowed to be applied to multiple Product line items then this should be set accordingly.