



BF Customer Account Management.doc

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TABLE OF CONTENTS

<u>1</u>	<u>Modification History</u>	<u>4</u>
<u>2</u>	<u>Message Handling</u>	<u>6</u>
<u>3</u>	<u>Login Page</u>	<u>6</u>
3.1	Processing Overview	6
3.2	Visual Guideline	6
3.3	New Customer Section	7
3.4	Returning Customers Section	7
3.5	Guest Checkout	7
3.6	Facebook Login	8
3.7	Email Validation	8
3.8	Returning Customers Validation	8
3.9	New or Guest Customers Validation	9
3.10	Button Actions	9
<u>4</u>	<u>Facebook Login Considerations</u>	<u>10</u>
4.1	Processing flow:	10
4.2	Processing Rules	10
<u>5</u>	<u>Forgot Password Page</u>	<u>12</u>
5.1	Overview	12
5.2	UI Guideline	12
5.3	Forgot Password Validations	12
<u>6</u>	<u>Registration Page</u>	<u>14</u>
6.1	Processing Notes	14
6.2	Optional Attributes	14
6.3	Custom Attributes	15
6.4	"Same As Billing"	15
6.5	Address Validation	15
6.6	UI Guideline	15
6.7	Processing Rules	17
6.8	Country Drop Down	18
6.9	Password Strength	18
6.10	Text Messaging	19
6.11	Validation and Messages	19
6.12	Password Helper Text	19
<u>7</u>	<u>Custom Party Attributes</u>	<u>21</u>
7.1	Introduction	21
7.2	Processing	21
7.3	References	23
<u>8</u>	<u>My Account</u>	<u>23</u>
8.1	Main Screen	24
8.2	Processing	25
<u>9</u>	<u>Personal Information</u>	<u>26</u>
<u>10</u>	<u>Login Information</u>	<u>27</u>
10.1	Update Login Information	27
10.2	Change Login Name	27

10.3	Change Password	28
10.4	Technical Note: Markup and Styling	29
11	Address Book	30
11.1	Overview	30
11.2	Address Book List	30
11.3	Button Actions	30
11.4	Add/Update Address Book	32
11.5	Address Validation	32
11.6	Technical Note: Markup and Styling	33
12	Payment Methods: Credit Card	34
12.1	Overview	34
12.2	Payment Method List	34
12.3	Button Actions	34
12.4	Maintain Credit Card	35
12.5	Edit Processing	35
12.6	Technical Note	36
13	Payment Methods: EFT	37
13.1	Overview	37
13.2	Payment Method List	37
13.3	Button Actions	37
13.4	Maintain EFT	37
13.5	Processing	38
13.6	Edit Processing	38
14	Order History	39
14.1	Overview	39
14.2	Visual Guideline	39
14.3	Processing	40
15	Order History Details	41
15.1	Overview	41
15.2	Shipping Groups	41
15.3	Visual Guideline: One Shipping Group	41
15.4	Visual Guideline: Multiple Shipping Groups	42
15.5	Processing	42
15.6	Technical Note:	43
16	Re-Order Items	44
16.1	Processing	44
16.2	UI Guideline	45
16.3	Technical Note: Markup and Styling	45
16.4	Re-Order Selected Items	46
17	Recurring Orders List	47
17.1	Overview	47
17.2	Visual Guideline	47
17.3	Processing	47
18	Recurring Orders Details	48
18.1	Visual Guideline	48
18.2	Processing	48

1 Modification History

Date	Who	Comments
11-Jan-11	Solveda	Initial
24-Jan-11	Solveda	State/Zip mandatory; changed position of required "*"
26-Jan-11	Solveda	Added validations to several functions. Added Email generation section
2-Feb-11	Solveda	Added message details; removed Email references into separate "Email" document.
08-Feb-11	Solveda	Added Add/Update Address Book entries
17-Feb-11	Solveda	Added eSpots
21-Apr-11	Solveda	Changed "Order Status Details" introduction text
12-Sep-11	Solveda	Added "country" indicator and morph form appropriately
23-Sep-11	Solveda	Added "opt-in" and email preferences to registration page
27-Sep-11	Solveda	Added PAGE content spots: PTS_LOGIN PTS_FORGOT_PASSWORD PTS_REGISTRATION PTS_MY_ACCOUNT PTS_CHANGE_PROFILE PTS_ADDR_BOOK_VIEW PTS_ADDR_BOOK_EDIT Added a confirmation prompt for DELETE actions.
1-Nov-11	Solveda	<ul style="list-style-type: none"> - Registration: Added Shipping Address - Personal Information: Removed address information ; added rules when the login information is not modified - Added rules for Password Strength - Split updating "Personal Information" from "Login Information" - Added Guest Checkout (also see document "<i>BF Cart and Check Out.doc</i>")
28-Nov-11	Solveda	Added "Old Password" to Login Information section
19-Dec-11	Solveda	Changed helper message for password to consider "password strength" functionality; Email used for login and forgot-password should NOT consider case when retrieving from the database
22-Dec-11	Solveda	Clarified functionality when customer clicks "same as billing"
15-Feb-12	Solveda	Added context sensitive message on login / registration page (for example: if user has to login to write a review)
7-Jun-12	Solveda	Modified the main "personal information" to have a Home, Cell and Work Telephone number. All phone numbers associated for an Address have been removed.
13-Jun-12	Solveda	Clarified requirements to control personal information collected such as Gender or Date-of-Birth.
26-Jul-12	Solveda	Clarified usability on main login / registration page for an already registered user.
31-Jul-12	Solveda	Added UK Date-of-Birth formats and Title to "Optional Attributes"
2-Aug-12	Solveda	Hide title value if the sequence is zero
26-Feb-13	Solveda	Added "text alert" option
18-Mar-13	Solveda	Added "My Payment Methods" page

3-Apr-13	Solveda	Maintain Credit Card: split "Name on Card" to First and Last name since this is how it is stored
18-Apr-13	Solveda	Added "Custom Attributes"
3-Jun-13	Solveda	Ability to "Re-Order" via the Order History function
22-Jul-13	Solveda	Added new Optional Attribute LOYALTY_POINT_ID
17-Sep-13	Solveda	Validation messages Re-order items
25-Sep-13	Solveda	Moved notification preferences to Personal Information section. Re-worked Login Information, can now change email or password
29-Nov-13	Solveda	Address Book: option to "Set As Default" and specific which Shipping-Address should be used as the default selection in the check out process
12-Dec-13	Solveda	"Same As Billing" reference to processing in spec " <i><u>BF Billing Shipping and Personal Info.doc</u></i> "
16-Dec-13	Solveda	Order-History-Details revamped to accommodate multiple Shipping Groups
19-Feb-14	Solveda	Added Facebook login
21-Apr-14	Solveda	Ability to maintain Electronic Funds Transfer (EFT) Payment Methods
28-Apr-14	Solveda	Manage Recurring Orders

2 Message Handling

- See spec "*BF General Concepts.doc*" for placement and handling of messages.
- Specific messages are noted in this document.

3 Login Page

3.1 Processing Overview

- The Login page is a multi-use function page:
 - Login using existing credentials
 - Register as a new customer
 - Continue the check-out process as a Guest
- Depending on where the Login function is accessed from, slightly different options are offered, some with information messages:
 - Sign-In / My Account link
 - Login using existing credentials
 - Register as a new customer
 - Check Out
 - Login using existing credentials
 - Register as a new customer
 - Continue the check-out process as a Guest (if allowable)
 - Write a Review
 - Login using existing credentials
 - Register as a new customer
 - Information Message as follows:


"In order to write a review you need to either Sign-In or Register for a new online account. After signing-in or registering you will be able to enter your product review."


3.2 Visual Guideline

Use this as a sample illustration, a link to retrieve a forgotten password should be provided for returning customers.

Sign In

Page Content Spot: Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER) Content ID: "PTS_LOGIN"

 Error Message

 Informational Message (optional)

3.3 New Customer Section

New Customer	
If you haven't bought from us before please enter your email address below, enter and confirm your password and click 'New Customer'. You will be asked for your personal details. We will then create an account for you to save you entering this information next time you visit!	
Email: <input type="text"/>	<input type="button" value="New Customer"/>

3.4 Returning Customers Section

Returning Customer	
If you are a returning customer and have registered with us previously, please login using your username (Email) and password below.	
Email: <input type="text"/>	<input type="button" value="Sign In"/>
Password: <input type="text"/>	
Forgotten your password?	

- Retrieval using the email address should NOT consider case

3.5 Guest Checkout

Guest Checkout	
You are not required to sign-in. You may complete your order as a guest. Enter your email address below and click on the 'Guest CheckOut' button to continue.	
Email: <input type="text"/>	<input type="button" value="Guest Checkout"/>

- For details of the check out workflow as a Guest:
 - refer to spec "[BF Cart and Check Out.doc](#)"
- The entered Email cannot match to an existing registered customer. If it does, display a message:


That email address is already registered. Please log in below. If you forgot your password, [click here](#) to retrieve it. Or, use a different email address to register a new account.

- Guest Checkout should only be offered if this page was displayed via the “CheckOut” button of “View Cart”. If accessed via Sign-In, then it should not display.
- Guest checkout is ONLY offered if the CHECKOUT_AS_GUEST = TRUE. This parameter is seeded as follows:

Seed Data:

Key	Category	Description	Default Value
CHECK_OUT_AS_GUEST	CHECK_OUT	Defines whether a customer can checkout as a Guest, without having to register.	true


3.6 Facebook Login

<p style="text-align: center;">Sign In With Facebook</p> <p>If you have a Facebook account and would prefer not to have to remember yet another user name and password.</p> <p style="text-align: center;">  </p>



- See section “Facebook Login Considerations” below

3.7 Email Validation




- The entered email address must be in a valid email format. If not a valid format then the following error is displayed:

 Please enter a valid Email Address in the box provided and then click CONTINUE

3.8 Returning Customers Validation

- Returning Customers must be authenticated against the Database. If not a valid combination of user-name and password then the following error is displayed:
 -  Unfortunately either the Username or Password that you entered is incorrect. Please check the details and enter the information again.
- Facebook Connected Customer
 - It is possible that a customer who originally registered as a Facebook user will attempt to login via this function
 - Therefore, if there is an invalid combination of user-name and password then further check the user-name (email) only – and if the PARTY_ATTRIBUTE.FACEBOOK_USER = TRUE display:
 -  This email address is already registered with us as a Facebook Login User. In order to access your account please use the Facebook Login

3.9 New or Guest Customers Validation

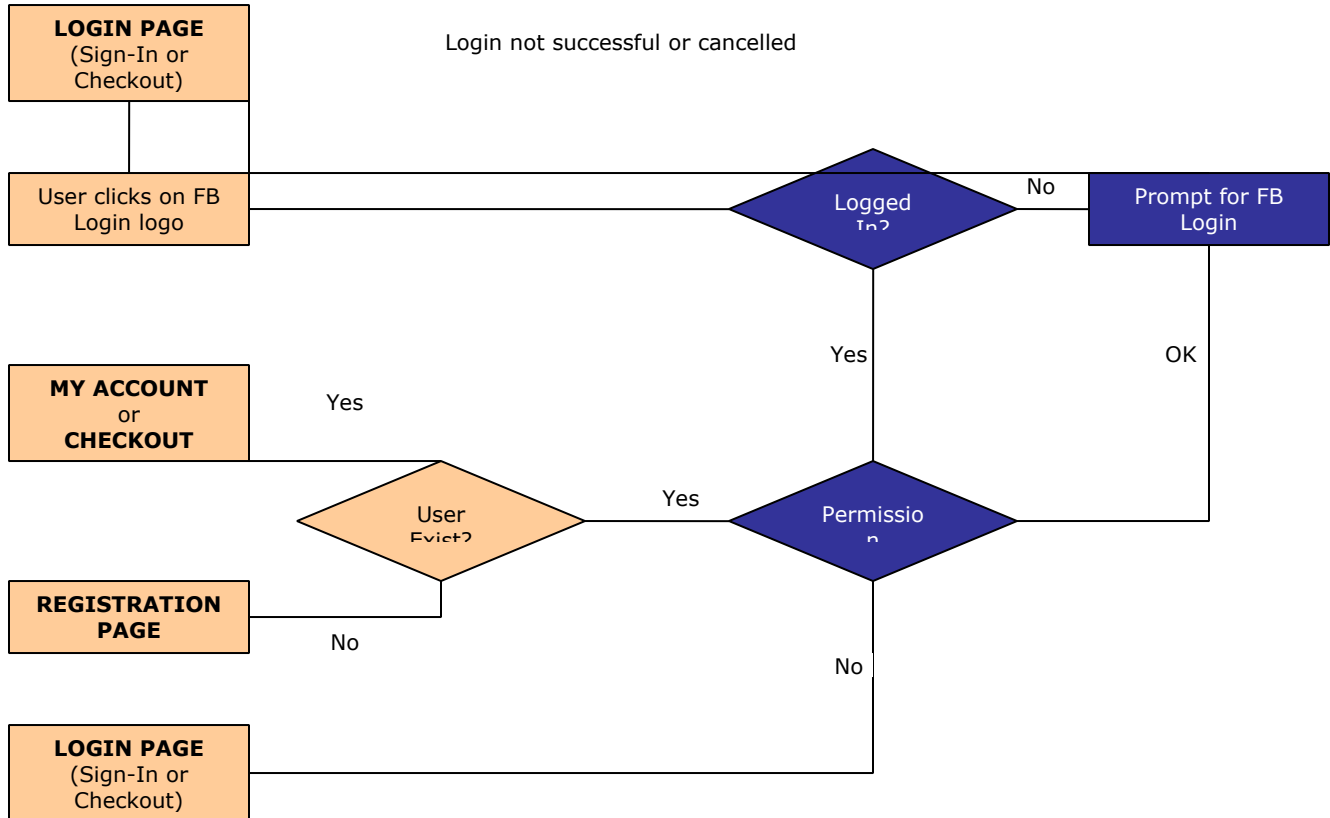
- New or Guest Customers must enter an email address. If not entered then the following error is displayed:
 -  Please enter a valid Email Address in the box provided and then click CONTINUE
- New or Guest Customers must enter a valid format for the email address. If not a valid format then the following error is displayed:
 -  Please enter a valid Email Address in the box provided and then click CONTINUE
- New or Guest customers must enter a unique email address. If the email address is already in use then the following error is displayed:
 -  It appears this email address is already registered with us. It may be you have already registered with one of our sister sites. If you cannot remember your password please use the 'Forgotten your password?' link and we will send you a new password to this address.
 - If this error occurs then the entered email address should be used to pre-fill the email address in the "Returning Customer" section.
 - If the "Returning Customer" section already has some entry then do NOT pre-fill

3.10 Button Actions

- Sign-In: if successful pass control to the "My Account" page.
- Continue: if successful pass control to the "Personal Information" page.

4 Facebook Login Considerations

4.1 Processing flow:



4.2 Processing Rules

- A FB-connect and Guest-Checkout are mutually exclusive
 - No special processing is required to achieve this
- User Registration
 - Any information available from the Public Profile of the FB user should be used to pre-fill the Registration Page
 - For a first time FB-connect, a BigFish user account is only created after a successful submission of the Registration form
 - After a successful Registration the following additional information will be stored in the PARTY_ATTRIBUTE entity
 - FACEBOOK_USER = TRUE
 - FACEBOOK_ID = [Facebook Identifier]

- The “Email Information” section, where the login-email and password details are provided, should NOT be displayed
- See section “Registration Page”
- Forgot Password
 - A FB connected user does not have a typical BigFish account
 - See section “Forgot Password Page”
- My Account
 - The option “Change Login Information” should be HIDDEN for a FB-connected user
 - See section “My Account”

5 Forgot Password Page

5.1 Overview

- The Forgot Password Page will send a 'new' password via email to a returning customer based on the username (email) provided.
- After the 'new' password is sent and the returning customer signs in, they are prompted to 'reset' the new password.

5.2 UI Guideline

Forgot Password

Page Content Spot:
Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER)
Content ID: "PTS_FORGOT_PASSWORD"

[message]

Forgot Your Password?

If you have forgotten your password, please enter your Username (Email) below and click Continue. We will then email you a new password to your contact email address. You can then use the new password to Sign in and for your security you will be prompted to reset your password.

Email:

Back

Continue

5.3 Forgot Password Validations

- Database retrieval should NOT consider case
- If the email entered does not match a user in the database display the following error message:

Unfortunately, we do not have a record of a registered customer with that Username. Please enter another Username and try again.
- If the email is matched in this database BUT the user-login is NOT enabled:

We were able to recognize your email address but there is a problem with your account. We cannot reset your password at this time.
- If the email is match in the database BUT the user is a Facebook connected user (PARTY_ATTRIBUTE.FACEBOOK_USER = TRUE):

You previously registered via a Facebook Login. In order to login again simply click on the Facebook Login logo.

- If the email is matched in the database display the following success message:

A new password has been sent to your contact email address. Please use the new password to sign in and for your security you will be prompted to reset your password.

Note: the Continue button will remain active and, if clicked, will pass control to the "Sign In" page.

6 Registration Page

The Registration Page is used to gather information about the 'new' customer in order to sign in to the eCommerce website.

6.1 Processing Notes

- Within the Personal Information section, clients may have specific requirements to collect information
 - Some are interested in Gender, others are not
 - Some are interested in Date of Birth, others are not
- As clients demand different personal information to be collected, such as Shoe-Size, Dress-Size, or other such personal questions they will be implemented at that time.
- All Personal Information attributes should be implemented, with options to expand the attributes as priorities demand
- A "DIV Sequencing" strategy will allow for attributes to be displayed or hidden

6.2 Optional Attributes

- Optional personal attributes are (controlled by DIV Sequencer strategy):

Attribute	Description
Title	Drop-down containing titles
Gender	Drop-Down containing Male or Female
Date of Birth (Short Form, US Format)	Day and Month only
Date of Birth (Long Form, US Format)	Day, Month and Year
Date of Birth (Short Form, UK Format)	Day and Month only
Date of Birth (Long Form, UK Format)	Day, Month and Year
Loyalty Point ID	The Loyalty Point Identifier

- Title
 - Titles can be maintained in the Admin Module, see *BF-Admin-Module-Admin*
 - Technical Notes:
 - Will be populated from the ENUMERATION
 - ENUM_TYPE_ID is "PERSONAL_TITLE"
 - Entries with a SEQUENCE_ID = 0 should be ignored and NOT displayed in the drop-down
- Gender
 - Populated from hard-coded values
- For Date attributes:
 - US vs UK Format
 - US Format has MONTH prior to DAY

- UK Format has DAY prior to MONTH
- Month (MM) is a drop-down that should display “Month” as the first and default value followed by 01 through 12
- Day (DD) is a drop-down that should display “Day” as the first and default value followed by 01 through 31
- Year (YYYY) is a drop-down that should display “Year” as the first and default value followed by “first-year” to “current-year”
 - First year is current system year less 70
 - Current year is derived from the system date
- *Technical Notes:*
 - These optional values are 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

6.3 **Custom Attributes**

- See the section “*Custom Party Attributes*” below for additional information as to how client specific information can be collected at registration time

6.4 **“Same As Billing”**

- The “Same as Billing” button is used to indicate that the Shipping details will be derived from the Billing details upon a “submit” request
 - See spec “*BF Billing Shipping and Personal Info.doc*” for additional information
- Address Nickname will default to “Home”

6.5 **Address Validation**

- See spec “*BF Address Validation.doc*” for processing information

6.6 **UI Guideline**

- Use this as a sample illustration, to gather the customers surname, billing address and login information.

Account Registration

Page Content Spot:

Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER)

Content ID: "PTS_LOGIN"

Personal Information

Please provide your details so that we can fulfill your order. Any information with an asterisk * is required.

* First Name:

Please enter your First Name

* Last Name:

Please enter your Last Name

* Gender:

Please select an option

* Date of Birth:

Please enter your date of birth

* Date of Birth:

Please enter your date of birth

* Home Phone: We may contact you by phone for delivery updates

Please enter a valid Home or Primary Telephone number

Cell Phone: Required for text message notifications

Work Phone: Ext:

Offers: ☐ Please send me exclusive discounts and special promotions

Email Notifications: ☒ I prefer emails in HTML
☐ I prefer emails in Plain Text

Text Message ☐ Yes, send me notifications via text message

Notifications: ☒ No, do not send me text notifications

CUSTOM PARTY ATTRIBUTES

Billing Address (Where is your credit card statement sent?)

* Country:

Please select a valid Country from the list

* Address 1:

Please enter Address-1 information

Address 2:

* City:

Please enter your city

* State:

Please select your State

* Zip:

Please enter your Zip Code

Shipping Address (Where would you like your items shipped?)

☐ Same as Billing

* Address Nickname: Shipping Address

Please enter a Nickname for this Address

* Country: Drop-down

Please select a valid Country

* Address 1:

Please enter address information

Address 2:

* City:

Please enter your city

* State: Drop down

Please select your State

* Zip:

Please enter your Zip Code

Email Information (Your email address is your login name)

* Email Address:

This will be used as your username.

Please enter a valid email address

* Confirm Email:

Please confirm your email address. It must match the Email Address.

* Password:

* Password Helper Text, see below

Please enter a valid password.

* Confirm Password:

Please confirm your password. It must match the Password field.

Continue

6.7 Processing Rules

- For a FB-connected user (PARTY_ATTRIBUTE.FACEBOOK_USER = TRUE) the "Email Information" section should NOT be displayed
- The Shipping Address section has the ability to copy details from the Billing Address; default the Address Nickname to "Shipping Address"; copy details from Billing section to Shipping section
- Labels should be used to manage displayed text (for example, **Billing Address** Where is your credit card statement sent? would be two separate labels)
- Email Address and Confirm Email must match

- The prompt for "Please send me exclusive offers" should default to NOT CHECKED (most countries have requirements that this is the case)

6.8 Country Drop Down

- See spec "[*BF Country Considerations.doc*](#)" for more information

6.9 Password Strength

- Password must conform to the required "strength" as defined by the following system parameters:
 - REG_PWD_MIN_CHAR: specifies the minimum number of total characters
 - REG_PWD_MIN_NUM: specifies the minimum number of numeric digits
 - REG_PWD_MIN_UPPER: specifies the minimum of uppercase characters

Examples:

MIN_CHAR	MIN_NUM	MIN_UPPER	Entered Password	Pass / Fail
8	0	0	passwrđ	Fail
8	0	0	password	Pass
8	1	0	password	Fail
8	1	0	passwrđ9	Pass
8	0	1	password123	Fail
8	0	1	Password123	Pass
8	2	1	Password123	Pass
8	2	2	Password123	Fail
8	2	2	PASSWORD123	Pass

Error Message:

The error message should clearly state the requirements based on the system parameters. It should also consider an appropriate plural/singular language. Examples:

MIN_CHAR	MIN_NUM	MIN_UPPER	Fail Message
8	0	0	The password must contain at least 8 characters.
8	1	0	The password must contain at least 8 characters and 1 numeric digit.
8	2	0	The password must contain at least 8 characters. It must also include 2 numeric digits.
8	0	1	The password must contain at least 8 characters. It must also include 1 upper-case letter.
8	0	2	The password must contain at least 8 characters. It must also include 2 upper-case letters.
8	2	1	The password must contain at least 8 characters. It must also include 2 numeric

			digits and 1 upper-case letter.
8	2	2	The password must contain at least 8 characters. It must also include 2 numeric digits and 2 upper-case letters.

Seed Data:


Key	Category	Description	Default Value
REG_PWD_MIN_CHAR	USER_PROFILE	Password Strength, specifies the minimum number of total characters	6
REG_PWD_MIN_NUM	USER_PROFILE	Password Strength, specifies the minimum number of numeric digits	0
REG_PWD_MIN_UPPER	USER_PROFILE	Password Strength, specifies the minimum of uppercase characters	0

6.10 Text Messaging

- This is an optional service provided by the client
- NOTE: there is a new caption depicted above, next to the cell phone entry. In the example it is "Required for text message notifications"
- If customer opted in for Text Message alerts cell phone entry is required
- Visibility is controlled via the DIV Sequencing strategy
 - See spec "[*BF Admin Module DIV Sequencer.doc*](#)"

6.11 Validation and Messages

- If any fields are in error display the following common area message:

 We're sorry but it appears as if the information you have provided is incomplete. Please check for errors below and try again.

6.12 Password Helper Text

- The Password helper text needs to consider the password strength rules
- The algorithm is as follows:

```

pwdHelpText  =      "min " + REG_PWD_MIN_CHAR + " characters"

switch REG_PWD_MIN_NUM
case 1
  pwdHelpText = pwdHelpText + ", at least one number"
case > 1
  pwdHelpText = pwdHelpText + ", at least " + REG_PWD_MIN_NUM + " numbers"
end

```

```
switch REG_PWD_MIN_UPPER
case 1
    pwdHelperText = pwdHelperText + ", at least one uppercase character"
case > 1
    pwdHelperText = pwdHelperText + ", at least " + REG_PWD_MIN_NUM
    + " uppercase characters"
end
```

7 Custom Party Attributes

7.1 Introduction

- Some clients will have specific requirements for collecting personal information that cannot be predicted and will not be solved within BigFish as standard options
 - Examples:
 - School needs to collect a "License Number"
 - Jeweler needs to collect "ring size" and "wedding date"
 - Shoe Retailers wants to collect "shoe size"
- BigFish will provide a flexible and dynamic way to manage the collection of this data
- The definition of these Custom Party Attributes will be defined within a specific XML file that describes the caption, entry type, validation, error messages and other information that is required to solve this feature

7.2 Processing

- Definition File (XML):

Attribute	Description
AttrName	The actual value that will be used to store the data in the PARTY.ATTR_NAME column. All entered customer values will be stored in the PARTY.ATTR_VALUE column.
SequenceNum	A numeric value that dictates the sequence that the attribute will be displayed in the event there are multiple custom attributes.
Caption	This is the text used to display as the caption.
Type	This defines the type of entry. Valid values are: ENTRY (single line edit field) ENTRY_BOX (multi line box edit field) RADIO_BUTTON CHECKBOX DROP_DOWN (single select) DROP_DOWN_MULTI DATE_MMDD DATE_MMDDYYYY DATE_DDMM DATE_DDMMYYYY
EntryFormat	This further defines the expectation of what information is entered. Value values are: ANY NUMERIC ALPHA_NUMERIC MONEY (will conform to the implementations currency rules)

	This only applies to a Type of ENTRY.
MaxLength	This indicates the maximum number of characters that can be entered into the field. This only applies to Type of ENTRY and ENTRY_BOX.
ValueList	This is a comma separated list of valid values that may be selected. This only applies to Type of RADIO_BUTTON, CHECKBOX, DROP_DOWN and DROP_DOWN_MULTI.
Mandatory	Indicates whether the entry is mandatory or optional. Valid values are YES or NO. This field will also determine if a "mandatory" indicator is displayed next to the caption (see example below).
MandatoryMessage	This defines the message to be displayed if the customer did not respond. This only applies when the Mandatory definition is set to YES.

■ Example:

○ XML Definition

```
<BigFishCustomPartyAttribute>
```

```

  <CustomPartyAttribute>
    <AttrName>RING_SIZE</AttrName>
    <SequenceNum>01</SequenceNum>
    <Caption>Ring Size:</Caption>
    <Type>RADIO_BUTTON</Type>
    <EntryFormat></EntryFormat>
    <MaxLength></MaxLength>
    <ValueList>Five, Six, Seven, Eight</ValueList>
    <Mandatory>Y</Mandatory>
    <MandatoryMessage>Please select a Ring Size</MandatoryMessage>
  </CustomPartyAttribute>

```

```

  <CustomPartyAttribute>
    <AttrName>RING_METAL_PREFERENCE</AttrName>
    <SequenceNum>02</SequenceNum>
    <Caption>Ring Metal Preference:</Caption>
    <Type>DROP_DOWN</Type>
    <EntryFormat></EntryFormat>
    <MaxLength></MaxLength>
    <ValueList>Yellow Gold, White Gold, Platinum</ValueList>
    <Mandatory>Y</Mandatory>
    <MandatoryMessage>Please select a Ring Metal Preference</MandatoryMessage>
  </CustomPartyAttribute>

```

```
</BigFishCustomPartyAttribute>
```

- UI Guideline

* Ring Size:

☐ Five
☐ Six
☒ Seven
☐ Eight

* Ring Metal Preference:

White Gold [drop-down]

- Database Storage

- Ring Size:

PARTY_ATTRIBUTE.ATTR_NAME = "RING_SIZE"
PARTY_ATTRIBUTE.ATTR_VALUE = "SEVEN"

- Ring Metal Preference:

PARTY_ATTRIBUTE.ATTR_NAME = "RING_METAL_PREFERENCE"
PARTY_ATTRIBUTE.ATTR_VALUE = "White Gold"

- Date Prompts

- All DATE% prompts should provide drop-downs for each date component, in the sequence appropriate for the format
 - Validation should be applied to ensure a valid date has been selected
 - Message "Please complete the selection of a date"
 - For example, if the format is DATE_MMDD then the UI guideline is:

Some Date:

MM ▼

DD ▼

7.3 References

- See spec "*BF Admin Module DIV Sequencing.doc*" for information about how any defined set of Custom Attributes are sequenced within the Registration pages
- See spec "*BF Admin Module Customers.doc*" to see how this impacts viewing and adding a new Customer

My Account

8.1 Main Screen

The My Account page is access via a link in the header content of the eCommerce site. This page allows the customer access to Personal Information, Address Book and Order Status.

My Account

Page Content Spot:
Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER)
Content ID: "PTS_MY_ACCOUNT"

Personal Information

Need to update your name or other personal information? Click the link below:

[Click here to change personal details](#)

Login Information

Need to update your e-mail address or password? Click the link below:

[Click here to change login details](#)

Address Book

Need to add or update an address? Click the link below:

[Click here to edit your address book](#)

Credit Card Payment Methods

Need to add or remove a Credit Card Payment Method? Click the link below:

[Click here to edit your credit card payment methods](#)

Electronic Funds Transfer (EFT) Payment Methods

Need to add or remove a EFT Payment Method? Click the link below:

[Click here to edit your EFT payment methods](#)

Order History

Need to view current or past orders? Click the link below:

[Click here to view your orders](#)

Recurring Orders

Use this function to manage any items that are part of your recurring orders. Click the link below:

[Click here to manage Recurring Orders](#)

8.2 Processing

- The "Credit Card Payment Methods" section should only be displayed if:

CHECKOUT_ALLOW_CC is "TRUE" and
CHECKOUT_KEEP_PAYMENT_METHODS is "TRUE"

- The "EFT Payment Methods" section should only be displayed if:

CHECKOUT_ALLOW_EFT is "TRUE" and
CHECKOUT_KEEP_PAYMENT_METHODS is "TRUE"

- The "Login Information" section should NOT be displayed if:
PARTY_ATTRIBUTE.FACEBOOK_USER = TRUE

Personal Information

The Personal Information Page allows the customer to 'update' personal information like first name, email address; password and the Billing Address on file.

Update Your Personal Information

Page Content Spot:

Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER)

Content ID: "PTS_CHANGE_PROFILE"

Personal Information

Please provide your details so that we can fulfill your order. Any information with an asterisk * is required.

* First Name:

Please enter your First Name

* Last Name:

Please enter your Last Name

* Gender:

Please select an option from the list

* Date of Birth:

Please enter your date of birth

* Date of Birth:

Please enter your date of birth

* Home Phone:

We may contact you by phone for delivery updates

Please enter your Home or Primary Telephone Number

Cell Phone:

Required for text message notifications

Work Phone:

Ext:

Offers: ☐ Please send me exclusive discounts and special promotions

Email Notifications: ☒ I prefer emails in HTML

☐ I prefer emails in Plain Text

Text Message ☐ Yes, send me notifications via text message

Notifications: ☒ No, do not send me text notifications

CUSTOM PARTY ATTRIBUTES

[Back](#)

[Continue](#)

- Same processing rules apply as per the "Registration Page" section

10 Login Information

- The Personal Information Page allows the customer to update their login information.

10.1 Update Login Information

Update Your Login Information

Login Information (Your email address is your login name)	
Email Address: jsmith@aol.com	<input type="button" value="Edit"/>
Password: *****	<input type="button" value="Edit"/>

- Email Address and Password are displayed as read-only fields
- The "Edit" action buttons will direct control to either the Change Login Name or Change Password screens, see below

10.2 Change Login Name

Change Login Name

Login Information	
Current Email Address: jsmith@aol.com	
* New Email Address:	<input type="text" value="johnsmith@hotmail.com"/> <input type="button" value="[message]"/>
* Confirm Email Address:	<input type="text" value="johnsmith@hotmail.com"/> <input type="button" value="[message]"/>
* Current Password:	<input type="text" value="*****"/> <input type="button" value="[message]"/>

- The Current-Email-Address is displayed as a read-only field
- Users are prompted to enter the remaining fields
- Validation will follow requirements in this document for:
 - New-Email-Address must be entered and must be a valid email address
 - Confirm-Email-Address must be entered and must match the New-Email-Address
 - New-Email-Address cannot be in use by another user
 - Current-Password must match to the value stored on file

- Action Buttons:
 - Back: return to the Update-Your-Login-Information page
 - Save: if successful return control to the My Account page
- Technical Notes
 - The USER_LOGIN entity is used to associate a user login (Email Address) to a PARTY entity
 - When modifying the Email-Address:
 - Match on USER_LOGIN.USER_LOGIN_ID
 - Set the USER_LOGIN.ENABLED to "N"
 - Create a new USER_LOGIN row with the new information
 - Maintain the associated in USER_LOGIN.PARTY_ID
- Re-activating a previously disabled login name
 - If a customer has previously overridden a login name (ENABLED = "N") they should still have the ability to re-use that previous login if requested
 - For example:

Action	Processing
User Registration	New customer, creates account as customer@somewhere.com
Changes login name	New name is customer@newplace.com
Changes login name back to original name	Previous login customer@somewhere.com has ENABLED set to "N" Original login customer@somewhere.com is now set to ENABLED = "Y"; Current login customer@newplace.com is now ENABLED = "N"

10.3 Change Password

Change Password

Change Password	
Current Email Address:	jsmith@aol.com
* Current Password:	<input type="password" value="*****"/> [message]
* New Password:	<input type="password" value="*****"/> * Password Helper Text [message]
* Confirm Password:	<input type="password"/> [message]

Back

Save

- The Current-Email-Address is displayed as a read-only field
- Users are prompted to enter the remaining fields
- Validation will follow requirements in this document for:
 - Current-Password must match to the value stored on file
 - New-Password must be entered and conform to the password strength rules

- Confirm-Password must be entered and must match the New-Password
- Action Buttons:
 - Back: return to the Update-Your-Login-Information page
 - Save: if successful return control to the My Account page

10.4 Technical Note: Markup and Styling

- See spec "*BF Technical Markup and CSS Guidelines.doc*" for additional information

Displayed Attribute	Class Name
Email Address	entry.userLogin
Confirm Email	entry.userLoginConfirm
Old Password	entry.userPassword
New Password	entry.userPassword
Confirm Password	entry.userPasswordConfirm

11 Address Book

11.1 Overview

- The Address Book Page is used by the customer to add, update or delete their address's on file.
- By default the customers 'Billing' address is the first selection.
- The customer may NOT delete the Billing Address; only update.

11.2 Address Book List

Update Your Address Book

Page Content Spot:
Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER)
Content ID: "PTS_ADDR_BOOK_VIEW"

These addresses can be used as delivery address during checkout.

Your Billing Address

Billing
Joe Smith
10 Bill Ave
Mineola NY 11530
United States

Update

Home

Home
Joe Smith
10 Home Ave
Rockville Ctr NY 11710
United States

Update

Delete

Set As Default

Summer Home (Default)

Summer Home
Joe Smith
10 Summer Home
Mineola NY 11530
United States

Update

Delete

Florida

Florida
Joe Smith
10 Florida Ave
Rockville Ctr NY 11710
United States

Update

Delete

Set As Default

Back

Add New Address

11.3 Button Actions

- Update: this will allow a customer to make changes to the Address

- Add New Address: this will allow a customer to add a new Address
- Delete: this will allow a customer to delete an Address. A confirmation prompt must verify this action with the text
 - "Are you sure you want to delete the address [Address-Name]?"
 - A Yes and No response must be offered
 - Only if the customer clicks on the Yes response will the address be deleted
- Set As Default:
 - this will set the selected Shipping Address as the default
 - The default will be used in the check-out process
 - The current default will be marked as such
 - In the above example, the "Summer Home" is the current default
 - "Summer Home" does NOT show the "Set As Default" option
 - The "Home" and "Florida" shipping addresses will display the "Set As Default" option
 - Technical Note
 - PARTY_PROFILE_DEFAULT.DEFAULT_SHIP_ADDR is used to designate a customer Shipping Address as the "default"

11.4 Add/Update Address Book

Update Address

Page Content Spot:
Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER)
Content ID: "PTS_ADDR_BOOK_EDIT"

Address

This address can now be used as your shipping or delivery address when checking out.

Any information with an asterisk * is required.

* Address Nickname:
Please enter a Nickname for this Address

* First Name:
Please enter your First Name

* Last Name:
Please enter your First Name

* Country:
Please select a valid Country from the list

* Address 1:
Please enter Address-1 information

Address 2:

* City:
Please enter your city

* State:
Please select your State

* Zip:
Please enter your Zip Code

Back

Save

- Processing for "Country" should be the same as the initial registration form described above
- Validation:
 - Nickname must be unique for this customer
"The entered Nickname [NICKNAME] has already been used in your address book. This must be unique, please retry."

11.5 Address Validation

- See spec "*BF Address Validation.doc*" for processing information

11.6 Technical Note: Markup and Styling

- See spec "*BF Technical Markup and CSS Guidelines.doc*" for additional information

Displayed Attribute	Class Name
Address Nick Name	entry.nickName
First Name	entry.firstName
Last Name	entry.lastName
Country	entry.country
Address 1	entry.addressOne
Address 2	entry.addressTwo
City	entry.city
State	entry.state
Zip	entry.postalCode

12 Payment Methods: Credit Card

12.1 Overview

- The Payment Methods is used by the customer to add, update or delete any Credit Card information that is on file
- Generation of the markup is part of the DIV Sequencing strategy
 - See spec "*BF Admin Module DIV Sequencer.doc*"

12.2 Payment Method List

My Credit Card Payment Information

Page Content Spot:
Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER)
Content ID: "PTS_PMT_METHOD_VIEW"

Card Number: <u>xxxxxxxxxx-1234</u>	Type: Visa	Name on Card: Bob Jones	Expires On: 03/2015
--	---------------	----------------------------	------------------------

[Edit](#)[Delete](#)

Card Number: <u>xxxxxxxxxx-9876</u>	Type: Amex	Name on Card: Bob M. Jones	Expires On: 02/2012 Expired
--	---------------	-------------------------------	-----------------------------------

[Edit](#)[Delete](#)[Set As Default](#)

Card Number: <u>xxxxxxxxxx-5656</u>	Type: Visa	Name on Card: Robert Jones	Expires On: 09/2014
--	---------------	-------------------------------	------------------------

[Edit](#)[Delete](#)[Set As Default](#)[Back](#)[Add New Card](#)

12.3 Button Actions

- Edit
 - Redirect to maintain Credit Card page, in edit mode
- Add New Card
 - Redirect to maintain Credit Card page, in add mode
- Delete:
 - Prompt for confirmation with message "Are you sure you want to delete Credit Card xxxxxxxxxxxx-1234?"

- Allow "Yes" and "No" as possible responses
- If "Yes" then delete the Credit Card information
- If deleting the "Default" credit card then update PARTY_PROFILE_DEFAULT to zero
- *TECHNICAL NOTES:*
 - There is no concept of 'deleting' a credit card in Ofbiz
 - the system can only 'expire' the reference to the customer card by setting the thru date on entity 'PAYMENT METHOD'.
 - The credit card (entity CREDIT_CARD) cannot be deleted.
- Set As Default
 - Should only be offered for the "non default" credit cards
 - Will set the default if clicked
 - Technical: OFBiz entity PARTY_PROFILE_DEFAULT
 - NOTE: it is possible that ALL items will be offered since the EFT payment could be the default

12.4 Maintain Credit Card

Credit Card

Page Content Spot:

Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER)

Content ID: "PTS_PMT_METHOD_EDIT"

[Change / Add] Credit Card

First Name:

Last Name:

Type:

Card Number:

Expiration Month:

Expiration Year:

Set As Default ☒ Yes ☐ No

12.5 Edit Processing

- NOTE: processing will re-use many of the features of the Check Out function
 - See spec "BF Cart and Checkout.doc" for details
- Type
 - In Edit mode this is NON editable
 - In Add mode, offer a drop-down of appropriate selections

- Card Number
 - In Edit mode this is NON editable
- First Name, Last Name, Expiration Month and Year
 - Should follow the same rules as Checkout
 - See spec "BF Cart and Checkout.doc" for details
- Set As Default should reflect the current setting
 - Technical: OFBiz entity PARTY_PROFILE_DEFAULT
- Save
 - Will save details to the database

12.6 Technical Note

- See spec "*BF Technical Markup and CSS Guidelines.doc*" for additional information
 - Class Names to be generated as follows:

Card Number	string.cardNumber
Card Type	string cardType
Name on Card	string.customerName
Expires	date expiration
Edit (button)	action.edit
Delete (button)	action.delete
Set as Default (button)	action.setAsDefault

13 Payment Methods: EFT

13.1 Overview

- This functions mimics the Credit Card processing above, only notable differences will be documented in this section

13.2 Payment Method List

My EFT Payment Information

Page Content Spot:
Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER)
Content ID: "PTS_PMT_METHOD_VIEW"

Account Name: Robert Jones	Bank Name: Citibank	Bank Acct#: <u>xxxx-1766</u>	Type: Checking	Edit	Delete
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Account Name: Bob M. Jones	Bank Name: Chase Bank	Bank Acct#: <u>xxxx-1276</u>	Type: Checking	Edit	Delete	Set As Default
-------------------------------	--------------------------	---------------------------------	-------------------	------	--------	----------------

Back

Add New EFT

13.3 Button Actions

- Delete:
 - Prompt for confirmation with message "Are you sure you want to delete EFT xxxx-1234?"
 - Allow "Yes" and "No" as possible responses
 - If "Yes" then delete the EFT information

13.4 Maintain EFT

EFT

Page Content Spot:
Content Menu: "PAGE_TOP_SPOT" (MENU_CONTAINER)
Content ID: "PTS_PMT_METHOD_EDIT"

[Change / Add] EFT

* Name on Account:

* Bank Name:	<input type="text" value="Chase Bank"/>
* Routing Number:	<input type="text" value="021000021"/>
* Account Number:	<input type="text" value="72557879988"/>
* Account Type:	<input type="text" value="Checking"/>
Set As Default	<input checked="" type="radio"/> Yes <input type="radio"/> No

13.5 **Processing**

- Name on Account
 - Mandatory "Name on Account is a required field"
- Bank Name
 - Mandatory "Bank Name is a required field"
- Routing Number
 - Mandatory "Routing Number is a required field"
 - Numeric "Routing Number must be numeric"
- Account Number
 - Mandatory "Routing Number is a required field"
 - Numeric "Routing Number must be numeric"
- Account Type
 - Drop down, mandatory "Checkings" or "Savings"
 - Default to "Checking"

13.6 **Edit Processing**

- Bank Name and Routing Number are NON editable fields

14 Order History

14.1 Overview

- The Order History page will provide the customer with details on orders placed in the last 6 months.
- The order number is a link to view the details of the order
- There is also functionality for re-ordering items from previous orders
 - Clicked on the Order row, this indicates that this specific Order should be used as a filter
 - Clicked at the bottom of the page, this indicates that all items should be filtered
 - See the Re-Order function for more details
- This page should use the DIV Sequencing strategy
 - See spec "*BF Admin Module DIV Sequencer.doc*" for more details

14.2 Visual Guideline

Order History

ORDER_STATUS_ESPOT					
Order Number:	Order Date:	Status:	Tracking#:	Total Amount:	
BF-33002940	02/23/2010	Approved	N/A	\$22.97	Re-Order
Order Number:	Order Date:	Status:	Tracking#:	Total Amount:	
BF-33002939	04/12/2010	Completed	Track Shipments	\$35.97	Re-Order
Order Number:	Order Date:	Status:	Tracking#:	Total Amount:	
BF-33002939	03/10/2010	Completed	USPS-100288-899	\$35.97	Re-Order
Back		Re-Order Items			

- Technical Note:
 - See spec "*BF Technical Markup and CSS Guidelines.doc*" for additional information
 - Class Names to be generated as follows:

Order Number	id.order
Order Date	date.order

Status	status.order
Tracking#	string.trackingNumber
Total Price	currency.totalPrice
Re-Order	action.reorder

14.3 Processing

■ No Orders Found

- If there are no historical orders for the customer then display as follows (message stored as a Label/Caption):

Order History

ORDER_STATUS_ESPOT

There are no orders on file

Back

■ Tracking#

- If the status of the Order is "Completed" and a Tracking# is available then display the Tracking#
- If there is only one Tracking# available for an Order (whole Order was shipped as a single Shipment; OR only a single partial shipment is available) then
 - Display the Tracking# as shown above (USPS-100288-899)
- If there are multiple Tracking#'s for an Order because Items were shipped in separate shipments then
 - display the Tracking# as "Track Shipments"
 - if clicked this will redirect to the Order Details page
- If a specific Tracking# is clicked see processing in Order Detail (Display Shipment Tracking Details)

15 Order History Details

15.1 Overview

- The Order History Detail page provides the full details for an order.
- This page is accessed by the order status list page and reuses portions of the "Order Confirmation" page.

15.2 Shipping Groups

- For most clients, in most cases, a single Shipping Group will be available
 - Most customers will ship all items to a single Shipping Address, and typically all items will be shipped together
- Multiple Shipping Groups will be available in the following instances:
 - Customer selected Multiple Addresses during check-out
 - Customer selected one Shipping Address for all items but items were shipped separately
- Displays must accommodate both single and multiple Shipping Groups

15.3 Visual Guideline: One Shipping Group

Order History

Order Number: BF-33002940	Customer: Joe Smith	Card Type: Visa x-1011
Order Status: Approved	Order Date: 01/19/2011	Exp Date: 01/2012

ORDER_DETAIL_ESPOT

Order Details

Joe Smith, 10 Bill Ave, Mineola, NY 11501

Product Image	Live Fish 1	Status:	Ship Date:	Carrier:	Track#:	Qty:	Price:	Total:
	Size: Medium Color: Red	Completed	01/23/2011	USPS	87-usps-901	1	\$6.99	\$6.99
Product Image	Live Fish 2	Status:	Ship Date:	Carrier:	Track#:	Qty:	Price:	Total:
	Size: Large Color: Red	Completed	01/25/2011	Fedex	87-usps-901	2	\$7.99	\$15.98

Sub Total	\$22.97
Shipping Method	Default Shipping
Shipping And Handling	\$6.95
Promotion (Free Shipping)	(\$6.95)
Sales tax	\$0.00

Total Price **\$22.97**

Back

15.4 Visual Guideline: Multiple Shipping Groups

Order History

Order Number: BF-33002940	Customer: Joe Smith	Card Type: Visa x-1011
Order Status: Approved	Order Date: 01/19/2011	Exp Date: 01/2012

ORDER_DETAIL_ESPOT

Shipping Group 1 of 2

Joe Smith, 10 Bill Ave, Mineola, NY 11501

Product Image	Live Fish 1	Status:	Ship Date:	Carrier:	Track#:	Qty:	Price:	Total:
	Size: Medium Color: Red	Completed	01/23/2011	USPS	87-usps-901	1	\$6.99	\$6.99

Shipping Group 2 of 2

Joe Smith, 1 Corporate Drive, Costa Mesa, CA 92626

Product Image	Live Fish 2	Status:	Ship Date:	Carrier:	Track#:	Qty:	Price:	Total:
	Size: Large Color: Red	Completed	01/25/2011	Fedex	Fedex-98765	2	\$7.99	\$15.98

Sub Total	\$22.97
Shipping Method	Default Shipping
Shipping And Handling	\$6.95
Promotion (Free Shipping)	(\$6.95)
Sales tax	\$0.00
Total Price	\$22.97

Back

15.5 Processing

- Display Shipment Tracking Details
 - The Tracking#, if available, will be displayed
 - It is linkable if there is Carrier URL Tracking information available
 - Clicking on the link will open a new window (popup)
 - This will contain the actual tracking information from the Carrier's website

15.6 Technical Note:

- See spec "*BF Technical Markup and CSS Guidelines.doc*" for additional information

- Order Detail

Displayed Attribute	Class Name
Order Number	id.order
Order Status	status.order
Customer	string.customerName
Order Date	date.order

- List of Products

Displayed Attribute	Class Name
Image	image.product
Product Name	string.productName string.productDescription
Status	Status order
Ship Date	date ship
Carrier	string.carrier
Track #	string trackingNumber
Qty	number.qty
Price	currency.price
Total	currency.price

- Order Summary

Displayed Attribute	Class Name
Sub Total	currency.subTotal
Shipping Method	string.shipMethod
Shipping and Handling	currency.shipping
Promotion	currency.promo
Tax	currency.tax
Total Price	currency.total

16 Re-Order Items

16.1 Processing

- Accessed From:
 - The "Re-Order Items" feature is to be made generally available
 - The most obvious access point will from the Order History page
 - It should be implemented in such a way as to be accessible from other access points to be defined in the future
- Modes
 - Re-Ordering items may include easy selection from a specific Order
 - Or may consider ALL items ordered
- Filter by Order
 - This will offer all previous Orders and an "All Orders" option
 - For example:

All Orders

BF-33002940 placed on 01/19/2011

BF-33002939 placed on 03/10/2010

BF-33002939 placed on 02/23/2010
 - The default setting is determined from the access point from the Order History screen
- Sequence
 - The list is to be sorted using the Last Ordered Date, most recent first
- No Longer Buyable
 - Products should be checked to see if they are still "buyable"
 - This will include checks for:
 - Existence in the Product Catalog
 - "membership" in at least one active "category"
 - "from/thru" date checks
 - Checks against "intro" and "disco" dates
 - Checks for available inventory, if applicable
 - If a Product is NOT "buyable" then display an appropriate caption in the "Check to Re-Order" box and disable the "Re-Order Qty" entry field
 - If there are NO items that are buyable then further hide the "Re-Order Selected Items" action button
- Multiple Order Items with the SAME Product
 - Should filter so that only one line item is displayed
 - The MOST RECENT Order Item should be displayed
- "Re-Order Check"
 - Is used to indicate which line items are to be re-ordered when the main "Re-Order Selected Items" button is clicked
- "Re-Order Qty"
 - Default values should reflect previously ordered quantities

- If the "Re-Order Qty" is modified by the customer then the "Re-Order Check" should be set to "checked"
- Prices should show the "current price", and not the price purchased on the original order
 - Clients would not want to show a price from a previous order that is lower than the current price
 - In some cases, a Product may not be available (removed, discontinued etc.)
 - The Product should NOT be displayed in the list

16.2 UI Guideline

Previously Purchased Products

Filter by Order: [drop-down]

Items Previously Ordered

	Live Fish 1 Size: Medium, Color: Red	Last Ordered Date: 18-Jun-2013	Check to Re-Order: <input type="checkbox"/>	Re-Order Qty: <input type="text" value="2"/>	Current Price: \$6.99
	Live Fish 2 Size: Large, Color: Red	Last Ordered Date: 1-May-2013	Check to Re-Order: No Longer Available	Re-Order Qty:	Current Price: \$7.99
	Live Fish 3 Size: Small, Color: Blue	Last Ordered Date: 17-Apr-2013	Check to Re-Order: <input type="checkbox"/>	Re-Order Qty: <input type="text" value="1"/>	Current Price: \$7.99

Back

Re-Order Selected Items

16.3 Technical Note: Markup and Styling

- See spec "BF Technical Markup and CSS Guidelines.doc" for additional information

Displayed Attribute	Class Name
Image	image.product
Product Name	string.productName

	string.productDescription
Last Ordered Date	date order
Check to Re-Order	input.reOrder
Re-Order Qty	input.qty
Current Price	currency.price

16.4 Re-Order Selected Items

■ Validation

- No items selected to 'Re-Order'
 - Message "Please select items to order".
- Qty is less than 1 or minimum required to order.
 - Message "The Quantity entered is less than the minimum allowed, please retry."

■ Action

- All items with a check in "Check to Re-Order" and a "Re-Order Qty" greater than one should be added to the Shopping Cart
- Control should then be passed to the "My Cart" page

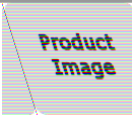
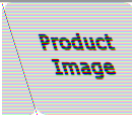
17 Recurring Orders List

17.1 Overview

- This page should use the DIV Sequencing strategy
 - See spec "*BF Admin Module DIV Sequencer.doc*" for more details

17.2 Visual Guideline

Recurring Orders List

RECURRING_ORDER_LIST_ESPOT						
	Live Fish 1	Qty:	Ship Date:	Frequency:	Unit Price:	Status:
	Size: Medium Color: Red	1	01/23/2011	3 Month	\$6.99	Active
Edit						
	Live Fish 2	Qty:	Ship Date:	Frequency:	Unit Price:	Status:
	Size: Large Color: Red	2	01/25/2011	3 Month	\$7.99	Cancelled
Edit						
Back						

17.3 Processing

- No Orders Found
 - If there are no historical orders for the customer then display as follows (message stored as a Label/Caption):

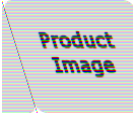

Recurring Orders

RECURRING_ORDER_LIST_ESPOT
There are no Recurring Orders on file
Back

18 Recurring Orders Details

18.1 Visual Guideline

Recurring Orders List

RECURRING_ORDER_DETAIL_ESPOT			
	Live Fish 2 Size: Large Color: Red		
Qty:	<input type="text" value="2"/>		
Ship Date:	<input type="text" value="01/25/2011"/>		
Frequency:	<input type="text" value="3 Month"/>		
Unit Price:	\$7.99		
Total:	\$15.98		
Shipping Address:	<input type="text" value="1 Main Street"/>	<input type="button" value="Add Address"/>	
Payment Method:	<input type="text" value="CC Amex *1008 12/2015"/>	<input type="button" value="Add Credit Card"/>	<input type="button" value="Add Check"/>
<input type="button" value="Back"/>		<input type="button" value="Save"/>	

18.2 Processing

- Qty rules must be applied
 - See spec "BF Product Detail Page.doc"
- Ship Date
 - Must be in the future
"The Ship Date must be in the future"
- Frequency
 - Drop down
- Shipping Address
 - Drop down
- Payment Method
 - Drop down
- Actions
 - Add Address
 - Redirect to the "New Address" page, upon save return to this page with the newly added address selected

- Add Credit Card
 - Redirect to the "New Credit Card" page, upon save return to this page with the newly added credit card selected
- Add Check
 - Redirect to the "New EFT" page, upon save return to this page with the newly added check selected