



BF Email.doc

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1 Modification History

Date	Who	Comments
8-May-12	Solveda	Initial
21-Jun-12	Solveda	Additional commentary added for each email notification
28-Jun-12	Solveda	Added Order-Items to the Abandoned Cart email template
31-Jul-12	Solveda	New email for mailing list subscription
4-Sep-12	Solveda	Added email for Feed Processing Alerts
16-Oct-12	Solveda	Clarification for Order Email processing
26-Feb-13	Solveda	Text (SMS) capability
11-Jun-13	Solveda	Added Message guidance
15-Oct-13	Solveda	Removed CLICKATELL related system parameters (TXT_XXX). These are now in the Parameters_Clickatell.xml file (see spec " <i>BF Admin Module Tools.doc</i> ")
19-Nov-13	Solveda	Check "status" on the email configuration. If "inactive" do not send the email.

2 Processing Overview

2.1 Templates

- The content of every email or text message is controlled via “templates”
- These are maintained via the Admin Module (option Admin / Email and Text Templates)

2.2 Example: end result

CLIENT LOGO

Shoes	Bags	Gifts	Sale Items
<p>Dear Bob Smith,</p> <p>Thank you for registering with [client].</p> <p>Your login name is your email address that you used at the time of registration.</p> <p>If you have any questions or concerns please call us at:</p> <p>1-800-555-1212</p> <p>Yours truly,</p> <p>www.client.com</p> <p>Like us on Facebook</p>			

2.3 Example: Template setup:

<HTML>

```
E_HEAD_TAG
  <head>
    Define all appropriate "head" tags
    Include E_COMMON_STYLES
  </head>

E_COMMON_STYLES
  <style>
    Define all appropriate styles
  </style>

E_COMMON_HEADER
  <table>
```

```

        Define primary images, navbar, etc.
    </table>

E_NEW_CUSTOMER

    Include E_META_TAGS

    <body width=80%>

        Include E_COMMON_HEADER

        <table>
            Dear Bob Smith, etc.
        </table>

        Include E_COMMON_FOOTER

    </body>

E_COMMON_FOOTER
    <table>
        If you have any questions ...
        Define social media links, disclaimer etc.
    </table>

</HTML>

```

2.4 **Email Processing Rules**

- The email CONFIGURATION (PRODUCT_STORE_EMAIL_SETTINGS) contains a STATUS_ID
 - This is managed as a Active or Inactive "Status" within the Admin Module
 - Only "Active" emails will be sent

2.5 **Email Templates**

- E_COMMON_HEADER: A common header that is included in each and every generated email from BigFish. Typically this will be used to define a common heading including the company logo and name and introduction.
- E_xxx. Where xxx is the specific email template.
 - E_ORDER_DETAIL: A common component that can be included in emails – it lists the details of an Order. Typically used in Order-Confirm, Order-Status-Change and Review emails.
- Common Sub components, typically included in E_ORDER_DETAIL
 - E_ORDER_HEADER: lists the details of an order
 - E_ORDER_PAYMENTS: lists the payments of an order
 - E_ORDER_SHIPMENTS: lists the shipments of an order
 - E_ORDER_ITEMS: lists the items of an order
 - E_ORDER_ITEM_SUMMARY: lists the summary totals of an order

- E_COMMON_FOOTER. A common footer that is appended to each and every generated email from BigFish. Typically this will be used to define a common "Yours Sincerely" or similar tagline.
- Styles are controlled by the common file E_COMMON_STYLES

2.6 TEXT Templates

- TXT_xxx. Where xxx is the specific text template.
- Styles and common components are NOT used for Text Messaging

2.7 Templates available:

EMAIL		
Template	Briefly	Description
E_ABANDON_CART	Abandon Cart Email	The actual email content that will be included in the Abandoned Cart email. Other PARAMETERS control the timing of this email
E_CHANGE_CUSTOMER	Change Party Email	The actual email content that will be included in the Change-Customer email (when the customer updates their profile).
E_CONTACT_US	Contact Us Email	The actual email content that will be included in the Contact-Us email. This email is sent to both the customer and the client. Note: not sure how this works since we probably grab content from the form.
E_FORGOT_PASSWORD	Forgot Password Email	The actual email content that will be included in the Forgot-Password email.
E_NEW_CUSTOMER	Create Party Email	The actual email content that will be included in the New-Customer email (when the customer completes the registration form).
E_ORDER_CHANGE	Order Notice Email	The actual email content that will be included in the Order-Change email (when the Status on the Order gets modified from one state to another).
E_ORDER_CONFIRM	Order Confirm Email	The actual email content that will be included in the Order-Confirm email (when the customer places an Order).
E_REQUEST_CATALOG	Request Catalog Email	The actual email content that will be included in the Request-Catalog email. This email is sent to both the customer and the client. Note: not sure how this works since we probably grab content from the form.
E_SHIP_REVIEW	Ship Review Email	The actual email content that will be included in the Ship Review email. Other PARAMETERS control the timing of this email.
E_MAILING_LIST	Mailing List Email	The actual email content that will be included in the Mailing-List email. This email sent to both the customer and the client.
E_SCHED_JOB_ALERT	Scheduled Job Processing	The email content that will be included in

	Alerts	the Scheduled Jobs Alert email
--	--------	--------------------------------

TEXT	
Template	Description
TXT_ABANDON_CART	Text equivalent of E_ABANDON_CART
TXT_NEW_CUSTOMER	Text equivalent of E_NEW_CUSTOMER
TXT_ORDER_CHANGE	Text equivalent of E_ORDER_CHANGE
TXT_ORDER_CONFIRM	Text equivalent of E_ORDER_CONFIRM
TXT_FORGOT_PASSWORD	Text equivalent of E_FORGOT_PASSWORD
TXT_SHIP_REVIEW	Text equivalent of E_SHIP_REVIEW
TXT_CHANGE_CUSTOMER	Text equivalent of E_CHANGE_CUSTOMER

2.8 Email Configuration

- For Email creation and send, BigFish leverages standard out-of-the-box functionality from OFBiz
- Each email can be configured with the following parameters:
 - Subject: used to identify the company name and the type of email being sent
 - From: typically from a generic client email account, example would be noresponse@someclient.com
 - CC: typically used to ensure that a Customer Service email queue receives all copies of emails
 - BCC: same as cc
- Emails that can be configured are as follows:

OFBiz Email	Description / Subject	
CONT_NOTI_EMAIL	Contact us Information	Implemented in BF
PARTY_REGIS_CONFIRM	Thank you for registering!!	Note: not currently in use in BF. See PRDS_CUST_REGISTER
PRDS_ABD_CART	Your Shopping Cart is Full	Implemented in BF
PRDS_CUST_REGISTER	Thank you for registering!!	Implemented in BF
PRDS_EMAIL_VERIFY	User Name Reminder	Note: not currently in use in BF
PRDS_GC_PURCHASE	A Gift From.	Note: Gift Cards not implemented
PRDS_GC_RELOAD	Gift Card Reload Results.	Note: Gift Cards not implemented
PRDS_ODR_BACKORDER	Backorder Notification.	Note: Backorder functionality not implemented
PRDS_ODR_CHANGE	Your Order #\${orderId} Status Has Changed!!	Note: not currently in use in BF
PRDS_ODR_COMPLETE	Your Order #\${orderId} Is Complete.	Triggered when the Order Status moves to COMPLETED.
PRDS_ODR_CONFIRM	Thank you for your order!!	
PRDS_ODR_PAYRETRY	Order Payment Notification #\${orderId}	Note: not used
PRDS_ODR_SHIP_COMPLT	Your Shipment #\${shipmentId} Has Shipped!!	Not used your BigFish. Triggered when Shipment status changed to SHIPMENT_SHIPPED
PRDS_PWD_RETRIEVE	Password Reminder	

PRDS_QUO_CONFIRM	Quote Confirmation #\${quoteId}	Note: Quotes not exposed in BF
PRDS_RTN_ACCEPT	Return Accepted #\${returnHeader.returnId}	Note: Returns not exposed in BF
PRDS_RTN_CANCEL	Return Cancelled #\${returnHeader.returnId}	Note: Returns not exposed in BF
PRDS_RTN_COMPLETE	Return Completed #\${returnHeader.returnId}	Note: Returns not exposed in BF
PRDS_SHIP_REVIEW	Your Recent Order, Tell Us What You Think!!	
PRDS_TELL_FRIEND	\${sendFrom} has sent you a link!	
REQCAT_NOTI_EMAIL	Request Catalog Notification	
UNSUB_CONT_LIST_NOTI	Unsubscribe Contact List	
UPD_PRSNL_INF_CNFRM	Personal Information Updated	
PRDS_MAILING_LIST	Mailing List Subscription	31-Jul-12: Added
PRDS_SCHED_JOB_ALERT	Scheduled Jobs Processing Alert	4-Sep-12: Added

2.9 Text Messaging Configuration

- For Text Messaging, a system parameter will determine if this option is available and which service should be used to send the message.
 - Parameter TXT_MESSAGE_METHOD:
 - NONE: Text Messaging is not active
 - CLICKATELL: Bulk SMS gateway provider

2.10 Template / Configuration Matrix

OFBiz Email	Email Template	Text Template	Comment / Question
CONT_NOTI_EMAIL	E_CONTACT_US	Not applicable	
PARTY_REGIS_CONFIRM			
PRDS_ABD_CART	E_ABANDON_CART	TXT_ABANDON_CART	
PRDS_CUST_REGISTER	E_NEW_CUSTOMER	TXT_NEW_CUSTOMER	
PRDS_EMAIL_VERIFY			Note: ok, not exposed in BF
PRDS_GC_PURCHASE			Note: ok, not exposed in BF
PRDS_GC_RELOAD			Note: ok, not exposed in BF
PRDS_ODR_BACKORDER			Note: ok, not exposed in BF
PRDS_ODR_CHANGE	E_ORDER_CHANGE	TXT_ORDER_CHANGE	
PRDS_ODR_COMPLETE	E_ORDER_CHANGE	TXT_ORDER_CHANGE	
PRDS_ODR_CONFIRM	E_ORDER_CONFIRM	TXT_ORDER_CONFIRM	
PRDS_ODR_PAYRETRY			Note: not exposed in BF
PRDS_ODR_SHIP_COMPLT			Not used in BigFish
PRDS_PWD_RETRIEVE	E_FORGOT_PASSWORD	TXT_FORGOT_PASSWORD	
PRDS_QUO_CONFIRM			Note: ok, not exposed in BF
PRDS_RTN_ACCEPT			Note: ok, not exposed in BF
PRDS_RTN_CANCEL			Note: ok, not exposed in BF
PRDS_RTN_COMPLETE			Note: ok, not exposed in

			BF
PRDS_SHIP_REVIEW	E_SHIP_REVIEW	TXT_SHIP_REVIEW	
PRDS_TELL_FRIEND			Note: ok, not exposed in BF
REQCAT_NOTI_EMAIL	E_REQUEST_CATALOG	Not applicable	
UNSUB_CONT_LIST_NOTI			Note: ok, not exposed in BF
UPD_PRSNL_INF_CNFRM	E_CHANGE_CUSTOMER	TXT_CHANGE_CUSTOMER	
PRDS_MAILING_LIST	E_MAILING_LIST	Not applicable	31-Jul-12: Added
PRDS_SCHED_JOB_ALERT	E_SCHED_JOB_ALERT	Not applicable	4-Sep-12: Added

2.11 System Parameters

- Relevant system parameters are as follows:

Parameter	Description
Email Formatting Parameters	
EMAIL_CLNT_LOGO	Path and image location, referenced in email-templates
EMAIL_CLNT_NAME	Client name, referenced in email-templates
EMAIL_CLNT_REPLY_TO	Client Email address, referenced in email-templates
EMAIL_CLNT_TEL_NO	Client Telephone number, referenced in email-templates
EMAIL_CLNT_URL_DISP	Displayed URL, referenced in email-templates
EMAIL_CLNT_URL_LINK	URL to visit, referenced in email-templates
EMAIL_FONT_FAMILY	Default font-family for all emails
EMAIL_REVIEW_SHP_DYS	Send email for product review after day ? shipped.
EMAIL_TBL_FONT_SIZE	Table font size, referenced in email-templates
EMAIL_TBL_HEAD_COLOR	Table color, referenced in email-templates
EMAIL_TBL_WIDTH	HTML Table size, referenced in email-templates
Text Messaging	
TXT_MESSAGE_METHOD	Indicates if Text Messaging (SMS) is an option and which service to use for delivery. Valid values are NONE, CLICKATELL
Abandoned Cart Parameters	
EMAIL_ABANDON_HRS	The time in hours to wait before sending the Abandoned Cart Email
EMAIL_ABANDON_NUM	The number of times to send the Abandoned Cart email, reset if the customer purchases in the meantime
Product Review Parameters	
REVIEW_SEND_EMAIL	This defines whether BigFish sends out the email notification 'n' days after the Order has Shipped
EMAIL_REVIEW_SHP_DYS	Send email [n] days after Order has been Shipped
REVIEW_ACTIVE_FLAG	Defines whether the ratings-and-reviews feature is active.

- NOTE:** As of 8-May-2012 these are the definitions. I suspect that there may be better ways to solve this. We have a concept of having an email "template", with provision for "footer" and "header" components. Not sure we need all these parameters.

2.12 Product Store Considerations

- Templates, configurations and system parameters to be defined by Product Store

3 Order Email Processing

3.1 Processing Overview

- In BigFish there are 3 status codes currently supported on the Order HEADER and Order ITEM level:
 - Approved
 - Completed
 - Cancelled
- Depending on the timing and status change actions the following emails are generated:

Trigger	Description	Email Sent
Order Placed	Status of ORDER and ITEMS is set to APPROVED	PRDS_ORD_CONFIRM E_ORDER_CONFIRM
ORDER Status Change to COMPLETE	Status of ORDER and All Shipped ITEMS shipped is set to COMPLETED. Note: any previously CANCELLED ITEMS should be excluded from the email.	PRDS_ODR_COMPLETE E_ORDER_CHANGE
Order Status Change to CANCELLED	Status of ORDER and all remaining ITEMS is set to CANCELLED. Note: any previously COMPLETED ITEMS should be excluded from the email	PRDS_ODR_CHANGE E_ORDER_CHANGE
ITEM Status Change to COMPLETED	Status of one or more items, but not ALL items, is set to COMPLETED. Note: any previously CANCELLED ITEMS should be excluded from the email.	PRDS_ODR_CHANGE E_ORDER_CHANGE
ITEM Status Change to CANCELLED	Status of one of more items, but not ALL items, is set to CANCELLED. Note: any previously COMPLETED ITEMS should be excluded from the email.	PRDS_ODR_CHANGE E_ORDER_CHANGE

3.2 Order Status Workflow Example

Trigger	Order	Item-1	Item-2	Item-3	Email Sent
Order Placed	Approved	Approved	Approved	Approved	PRDS_ORD_CONFIRM email sent. Details reflect all 3 products.
Status Change: Item-2 is Cancelled	Approved	Approved	Cancelled	Approved	PRDS_ODR_CHANGE email sent. The standard "order detail" template

					can be used, but Item-2 should show a "Cancelled" status.
Status Change: Item-1 and Item-3 are Completed	Completed	Completed	Cancelled	Completed	PRDS_ODR_COMPLETE email sent. The standard "order detail" template can be used, but Items 1 and 3 should show a "Completed" status.

3.3 Order Email Content

Order Information

Order Number: ORD1000

Name: Test Customer

Order Date: 2011-01-01

Shipping Information

Destination: Test Customer
100 Test Ave
New York, NY
10010

Method: UPS

Payment Information

Credit Card: Visa
411111111111
10/2014

Order Items

Product	Description	Status	Qty	Price	Total
[IMAGE]	Product A	Approved 12-Jan-2012	1	\$2.99	\$2.99
[IMAGE]	Product B	Cancelled 15-Jan-2012	3	\$9.99	\$0.00
[IMAGE]	Product C	Completed 22-Jan-2012	2	\$3.99	\$7.98

Sub Total	\$10.97
Shipping and Handling	\$5.95
Tax	\$2.95
Total	<u>\$19.87</u>

4 Template Examples

4.1 Email Content Template

[client logo]

[Client Title]

Dear [first-name] [last-name],

[Specific Email Content]

Thank you,
[client-info]

- If the [client-info] includes an email address then provide an “mailto” link in the following format:

[mailto:customerserver@client.com?subject=\[client\] Customer Service Team \[inquiry-type\]](mailto:customerserver@client.com?subject=[client] Customer Service Team [inquiry-type])

where [inquiry-type] is some indication as to the original email that the customer received. In other words, if the customer is responding to the Order Confirmation email then [inquiry-type] would be set to “[Order Confirmation]”

If the [client-info] includes a website then this should also be web linked.

5

Registration Notification

5.1 Processing Rules

Overview:	The Registration Notification is an email that gets sent to the customer after they have registered. It is sent immediately (not part of a scheduled service).
Triggers:	Successful Customer Registration Successful Account Creation at the end of "Guest" checkout
OFBiz Email:	PRDS_CUST_REGISTER
Template:	E_NEW_CUSTOMER
From:	Defined in configuration
To:	[CUSTOMER]
CC:	Defined in configuration
BCC:	Defined in configuration

5.2 Visual Example:

Subject	[EMAIL_CLNT_NAME] Thank you for registering!
Content:	[logo]

[Client Title] Registration Confirmation

Dear [first] [last],

Thank you for registering your account with [client.com].

Your logon id is the Email address you supplied when you registered:

[email address]

Thank you, etc

[client info]

User Profile Updated Notification

6.1 Processing Rules

Overview: The User Profile Updated Notification is an email that gets sent to the customer after they have modified any attributes that are part of their User Profile. This includes name, password and address book entries.

It is sent immediately (not part of a scheduled service).

Triggers: Customer modifies User Profile

OFBiz Email: UPD_PRSNL_INF_CNFRM

Template: E_CHANGE_CUSTOMER

From: Defined in configuration

To: [CUSTOMER]

CC: Defined in configuration

BCC: Defined in configuration

6.2 Visual Example:

Subject Your Personal Information has been updated
Content: [logo]

[Client Title] Your Profile Has Changed

Dear [first] [last],

Just a quick notification to inform you of a recent change to your personal information.

If you did not make these changes then may we suggest that you return to [website_url], login and modify your password. This will protect you from further changes.

Your logon id is the Email address you supplied when you registered:

[email address]

Thank you, etc

[client info]

Order Confirmation Notification

7.1 Processing Rules

Overview:	The Order Confirmation Notification is an email that gets sent to the customer after they have successfully completed an Order. It is sent immediately (not part of a scheduled service).
Triggers:	Customer successfully completes an Order
OFBiz Email:	PRDS_ODR_CONFIRM
Template:	E_ORDER_CONFIRM
From:	Defined in configuration
To:	[CUSTOMER]
CC:	Defined in configuration
BCC:	Defined in configuration

7.2 Visual Example:

Subject	[EMAIL_CLNT_NAME]: Thank you for your Order!
Content:	[logo] [Client Title] Order Confirmation Thank you for shopping with [client.com], below is a confirmation of your order. [ORDER EMAIL CONTENT] Thank you, etc [client info]

Order Change Notification

8.1 Processing Rules

Overview: The Order Change Notification is an email that gets sent to the customer after the status of an Order has been modified. This should include changes to one item or all items within the Order.

Order Status changes can be performed by the Client via the Admin Module OR via an Order Status XML Feed.

It is sent immediately (not part of a scheduled service).

CONFIRMATION REQUIRED

Triggers: Client changes Order Status

OFBiz Email: PRDS_ODR_CHANGE

Template: E_ORDER_CHANGE

From: Defined in configuration
To: [CUSTOMER]
CC: Defined in configuration
BCC: Defined in configuration

8.2 Visual Example:

Subject [EMAIL_CLNT_NAME]: The status of your order has Changed!

Content: [logo]

[Client Title] Order Status Notification

The Status of the below Order is now [status].

[ORDER EMAIL CONTENT]

Thank you, etc

[client info]

Order Fulfillment Notification

9.1 Processing Rules

Overview: The Order Fulfillment Notification is an email that gets sent to the customer after the Order has been successfully fulfilled (shipped). Order Header Status is set to COMPLETED.

This should include fulfillment of one item or all items within the Order.

Order Fulfillment changes can be performed by the Client via the Admin Module OR via an Order Status XML Feed.

It is sent immediately (not part of a scheduled service).

Only ITEMS that are COMPLETED should be included – if any items were previously cancelled they should NOT appear.

Triggers: Client changes Order Status

OFBiz Email: PRDS_ODR_COMPLETE

Template: E_ORDER_CHANGE

From: Defined in configuration
To: [CUSTOMER]
CC: Defined in configuration
BCC: Defined in configuration

9.2 Visual Example:

Subject [EMAIL_CLNT_NAME]: Your Order has been shipped!

Content: [logo]

[Client Title] Order Shipment Notification

The Order items below have been shipped.

[ORDER EMAIL CONTENT]

Thank you, etc

[client info]

Password Reminder Notification

10.1 Processing Rules

Overview:	The Password Reminder Notification is an email that gets sent to the customer after the customer clicks on the "Forgot Password" link in the eCommerce implementation. The password is RESET and the NEW password is emailed. It is sent immediately (not part of a scheduled service).
Triggers:	Customer clicks on "Forgot Password" and enters a valid email address
OFBiz Email:	PRDS_PWD_RETRIEVE
Template:	E_FORGOT_PASSWORD
From:	Defined in configuration
To:	[CUSTOMER]
CC:	Defined in configuration
BCC:	Defined in configuration

10.2 Visual Example:

Subject	[EMAIL_CLNT_NAME]: Password Reminder
Content:	[logo]

[Client Title] Password Reminder

Dear [first] [last],

We have generated a new password for you.

Your password has been changed to: u5crnjvjg

Use this password next time you log in.

You can change the password from the MY ACCOUNT page.

Thank you, etc

[client info]

Contact Us Notification

11.1 Processing Rules

Overview: The Contact Us Notification is an email that gets sent to the client and customer after the customer completes a Contact Us Request in the eCommerce implementation.

Contact Us Events are also available for download in the Admin Module (Customers module).

It is sent immediately (not part of a scheduled service).

Triggers: Customer completes a Contact Us Request

OFBiz Email: CONT_NOTI_EMAIL

Template: E_CONTACT_US

From: Defined in configuration
To: Email-Address entered in Form
CC: Defined in configuration
BCC: Defined in configuration

11.2 Visual Example:

Subject [EMAIL_CLNT_NAME]: Contact us Information

Content: [logo]

[Client Title] Contact Us

Reason For Contact:	[REASON FOR CONTACT]
First Name:	[FIRST NAME]
Last Name:	[LAST NAME]
Email Address:	[EMAIL ADDRESS]
Contact Phone:	[CONTACT PHONE]
Order Id:	[ORDER ID]
Comment:	[COMMENT]
Thank you, etc	

[client info]

12 Request Catalog Notification

12.1 Processing Rules

Overview: The Request Catalog Notification is an email that gets sent to the client and customer after the customer completes a Request Catalog Request in the eCommerce implementation.

Request Catalog Events are also available for download in the Admin Module (Customers module).

It is sent immediately (not part of a scheduled service).

Triggers: Customer completes a Request Catalog Request

OFBiz Email: REQCAT_NOTI_EMAIL

Template: E_REQUEST_CATALOG

From: Defined in configuration
To: Email-Address entered in Form
CC: Defined in configuration
BCC: Defined in configuration

12.2 Visual Example:

Subject [EMAIL_CLNT_NAME]: Catalog Request

Content: [logo]

[Client Title] Catalog Request

First Name:	[FIRST NAME]
Last Name:	[LAST NAME]
Address1:	[ADDRESS1]
Address2:	[ADDRESS2]
City:	[CITY]
State:	[STATE]
Zip:	[ZIP]
Email Address:	[EMAIL ADDRESS]
Contact Phone:	[CONTACT PHONE]
Comment:	[COMMENT]
Thank you, etc	

[client info]

13 Mailing List Notification

13.1 Processing Rules

Overview: The Contact Us Notification is an email that gets sent to the client and customer after the customer completes a Subscribe to Mailing List form request in the eCommerce implementation.

It is sent immediately (not part of a scheduled service).

Triggers: Customer completes a Sign-Up form

OFBiz Email: PRDS_MAILING_LIST

Template: E_MAILING_LIST

From: Defined in configuration
To: Email-Address entered in Form
CC: Defined in configuration
BCC: Defined in configuration

13.2 Visual Example:

Subject [EMAIL_CLNT_NAME]: Mailing List Information

Content: [logo]

[Client Title] Mailing List Subscription

First Name: **[FIRST NAME]**
Last Name: **[LAST NAME]**
Email Address: **[EMAIL ADDRESS]**
Thank you, etc

[client info]

14 Abandoned Cart Notification

14.1 Processing Rules

Overview:	<p>The Abandoned Cart Notification is an email that gets sent to the customer a certain time after the customer placed items into their Cart but did not complete the purchase.</p> <p>Typically this is an opportunity for a Client to offer a special discount if the customer returns and completes the sale.</p> <p>Two system parameters are used:</p> <p style="text-align: center;">EMAIL_ABANDON_HRS EMAIL_ABANDON_NUM</p> <p>It is sent as part of a Scheduled Service.</p>
Triggers:	Customer adds item to their Cart without completing the purchase.
OFBiz Email:	PRDS_ABD_CART
Template:	E_ABANDON_CART
From:	Defined in configuration
To:	[CUSTOMER]
CC:	Defined in configuration
BCC:	Defined in configuration

14.2 Visual Example:

Subject	[EMAIL_CLNT_NAME]: Your Shopping Cart is Full
Content:	[logo]

[Client Title] Your Cart is Full

Dear [first] [last],

Thanks for recently visiting [client.com] Just a reminder – the items we’re holding in your shopping cart will expire in a few days.

To purchase the items in your cart now, just **login to your account**. You can also review your selections, add more items, change what you’ve already picked, and place your order by proceeding to checkout.

We will even sweeten the deal by offering you an additional 10% discount if you purchase these items today! Just enter the discount

code 10_PCT_OFF during checkout.

Items in Your Cart

Product	Description
Image-A	Product-Description-A
Image-B	Product-Description-B
Image-B	Product-Description-C

If you have any questions about our products, or need help with your purchase, please call our Customer Care Center at 1-800-555-5555.

Thank you, etc

[client info]

15 Review Product Notification

15.1 Processing Rules

Overview: The Review Product Notification is an email that gets sent to the customer a certain time after the Order ships to the customer and encourages the customer to return to the site to post a product review.

Following system parameters are used:

REVIEW_SEND_EMAIL
EMAIL_REVIEW_SHP_DYS
REVIEW_ACTIVE_FLAG

It is sent as part of a Scheduled Service.

Triggers: Client completes Order

OFBiz Email: PRDS_SHIP_REVIEW

Template: E_SHIP_REVIEW

From: Defined in configuration
To: [CUSTOMER]
CC: Defined in configuration
BCC: Defined in configuration

15.2 Visual Example:

Subject [EMAIL_CLNT_NAME]: Your Recent Order, Tell Us What You Think!!
Content: [logo]

[Client Title] Tell Us What You Think

Dear [first] [last],

We recently shipped items to you – we certainly hope you are enjoying our products.

We'd love to get your feedback!! Simply click on the "Review" link below and you will have an opportunity to post a review on our site.

Order Items		
Product	Description	
Image-A	Product-Description-A	Review
Image-B	Product-Description-B	Review
Image-B	Product-Description-C	Review

Thank you, etc

[client info]

16 Scheduled Job Alert Notification

16.1 Processing Rules

Overview: The Scheduled Job Alert email is generated after the execution of a Scheduled Job.

Following system parameters are used:

SCHED_JOB_ALERT_EMAIL

Triggers: Scheduled Job has executed

OFBiz Email: PRDS_SCHED_JOB_ALERT

Template: E_SCHED_JOB_ALERT

From: Defined in configuration

To: The CC defined in the configuration

CC: None

BCC: Defined in configuration

16.2 Visual Example:

Subject [EMAIL_CLNT_NAME]: Scheduled Job [scheduledJobName] has [scheduledJobStatus]

Content: [logo]

[scheduledJobName]

[scheduledJobStatus]

[scheduledJobInfo]

17 Text Messaging

17.1 Processing

- Text messaging will only be executed if:
 - The Customer preference indicates Text Messaging notifications are acceptable
 - See spec "*BF Customer Account Mgmt.doc*"
 - And the system parameter TXT_MESSAGE_METHOD indicates that a Text service is available
 - And the Text Template is "active"
- Text Messages are available for a subset of BigFish notifications:
 - TXT_ABANDON_CART
 - TXT_NEW_CUSTOMER
 - TXT_ORDER_CHANGE
 - TXT_ORDER_CONFIRM
 - TXT_FORGOT_PASSWORD
 - TXT_SHIP_REVIEW
 - TXT_CHANGE_CUSTOMER

17.2 Clickatell

17.2.1 Parameter Details

- The parameters are stored in the Parameters_Clickatell.xml file
- These may be maintained using the BigFish Parameters tool
 - See spec "BF Admin Module Tools.doc" for more details
 - Relevant parameters are:

Key	Solveda Test Settings
TXT_MESSAGE_API_URL	http://api.clickatell.com/http/sendmsg
TXT_MESSAGE_API_MSG_URL	http://api.clickatell.com/http/querymsg
TXT_MESSAGE_USER_ID	solveda
TXT_MESSAGE_PASSWORD	solveda2013
TXT_MESSAGE_API_ID	3414659
TXT_MESSAGE_VIRTUAL_NUMBER	13472345789
TXT_MESSAGE_FROM_MO	1

17.2.2 Authentication Details

- Login

https://www.clickatell.com/login□
Option: Developers Central
Username: solveda
Client ID: SLSK56
Password: solveda2013
- HTTP API Documentation

clients -> Big Fish -> docs -> Text Messaging -> Clickatell - Clickatell_HTTP.pdf

- Using HTTP API protocol

API ID: 3414659

- Example Request

```
http://api.clickatell.com/http/sendmsg
    ?user=solveda
    &password=solveda2013
    &api_id=3414659
    &to=15165551212,12125551212
    &text=[SMS Message]
    &from=13472345789
    &mo=1
```



18 Success or Failure Messages

18.1 Success

- Specific specifications should be reviewed for eCommerce success messages when sending emails
- Example:

☒ Congratulations! You have setup a new account.

18.2 Failure

- If, for any reason, there is a failure in sending the email then initial guidance should be driven from the specific specs.
- In addition, the “technical” reason should be shown whenever available
 - Email failures are a serious issue, and whilst displaying an “ugly” technical message may not seem desirable the message will contain valuable information in order to solve the problem.
- Example:

☒ Your request has been processed but we’re unable to send an email confirmation at this time.

Technical Details:

Error when sending message to acme@somecompany.com from bigfish@solveda.com cc null bcc bigfishqa@solveda.com subject FH_QA: Contact Us Information

[Technical_Error_Details]

19 Template Setup

19.1 Overview

- This section provides guidance as to how emails should be setup, in particular how email templates should be re-used
- The primary goal is to setup standard templates, and standard "snippets" that can be consolidated together to create a complete email
 - This will ultimately lead to smaller sections of FTL that are manageable to edit and maintain
- This guide should be used to setup the baseline "seeded" email templates
 - If clients prefer other implementations then that option is available by modifying the templates

19.2 Styling and UI Guidelines

- The markup generated by the FTL process should match that generated in the eCommerce site
 - See spec "*BF Technical Markup and CSS Guidelines.doc*"
- This will result in emails that match the implementation
 - To achieve this the primary style sheet "*bigFishClientSkin.css*" will be used

Discussion (also see BF Ticket 29987)

There are resources on the web that indicate having a separate CSS is not going to work for many of the email clients. The way to define styles is "inline".

Additional discussion indicates that using DIVs is not a good approach and TABLEs should be used instead.

Can we at use styling names in the TABLEs that match names already in use in the CSS?

Even if these need to be cut-and-paste from the main CSS into an email style sheet (inline) we at least get some nice consistency.

If the primary CSS is modified then we could have instructions as to how to update the email CSS section?

At least with this approach it would mean no or minimal changes to the seeded templates since the email CSS will do all the styling work.

19.3 Styling Example

- eCommerce:
 - Payment Information component on order Confirmation Page

- Markup:

```
<div class="checkoutOrderPaymentInformation">

  <div class="displayBox">
    <h3>Payment Information</h3>
    <ul class="displayList creditCardInfo">
      <li>
        <div>
          <label for="cardType">Card Types:</label>
          <span>Visa</span>
        </div>
      </li>
      <li>
        <div>
          <label for="cardNumber">Card Number:</label>
          <span>XXXXXXXXXXXX-1111</span>
        </div>
      </li>
    </ul>
  </div>
</div>
```

- CSS styles:

```
label {bold and black}
span {bold and red}
displayBox {width:100%; borders and spacing}
displayBox.H3 {background-color:grey; big font}
```

- Will Display

Payment Information	
Card Type:	Visa
Card Number:	XXXXXXXXXXXX-1111

- Emails:

- Payment Information component on Order Confirmation Email

- HTML:

```
<table class="displayBox">
<tr>
<td class="H3">Payment Information</td>
</tr>
<tr>
□□□□□ <td class="label">Card Type:</td>
□□□□□ <td class="span">Visa</td>
</tr>
<tr>
□□□□□ <td class="labelFont">Card Number:</td>
□□□□□ <td> XXXXXXXXXXXX-1111</td>
</tr>
</table>
```


- CSS styles (same as eCommerce with a leading period):

```
.label {bold and black}
.span {bold and red}
.displayBox {width:100%; borders and spacing}
.displayBox.H3 {background-color:grey; big font}
```

- Will Display (the same as eCommerce)

Payment Information	
Card Type:	Visa
Card Number:	xxxxxxxxxxx-1111

19.4 High Level Structure

- All emails should be structured as follows:


HEADER

DETAILS (Can be further divided by using email template “snippets”, see below)

SIGNATURE

FOOTER

- Visual Example

[HEADER]				
				
Rings	Diamonds	Bracelets	Earrings	Gift Ideas
[DETAILS]				
Dear John Smith,				
Thank you for registering your account with www.acme.com .				
Your login id is the Email address you supplied when you registered:				
john.smith@somewhere.com				

[SIGNATURE]

Thank you, etc

ACME Customer Service

1-888-555-1212

[FOOTER]

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19.5 Dynamic Product Related Emails

- There are many Product related emails that are generated
 - Abandoned Cart
 - Order Confirmation
 - Product Review
 - Order Status Changed
- The seeded templates need to provide sensible email templates “snippets” of information that can be grouped together in order to build the final email
- Email template “snippets” are:
 - Order Information
 - Payment Information
 - Shipping Groups
 - Shipping Address
 - Product Details (complete)
 - Shows order qty and pricing
 - Used for Order Confirmation and Order Status changed
 - Product Details (brief)
 - Simple display of image and product description
 - Used for Abandoned Cart and Product Review
 - Order Summary
 - This will show the summary of the order including item summary, promotional and other discounts, taxes and the final amount
- Visual Example (Order Confirmation)

[HEADER]

[Rings](#)[Diamonds](#)[Bracelets](#)[Earrings](#)[Gift Ideas](#)

[DETAILS]

Dear John Smith,

Thank you for your order. Below are the confirmation details

ORDER INFORMATION

Order Number: **10048**
Name: **John Smith**
Order Date: **2013-08-29**

PAYMENT INFORMATION

Credit Card: **American Express**
Number: **xxxxxxxxxxx-3029**
Expiration: **06/2014**

SHIPPING INFORMATION

Deliver To: **739 Walnut Street, Philadelphia, PA 19106 United States**
Method: **Fedex Standard Overnight**

PRODUCT DETAILS

		Qty	Price	Total
IMAGE	Sky Blue Diamond Studs 0.5 ct	1	\$569.00	\$569.00
IMAGE	Silver Vintage Pear Shape Diamond Earrings	1	\$229.00	\$229.00

SHIPPING INFORMATION

Deliver To: **1 Corporate Drive, Costa Mesa, CA 92626 United States**
Method: **UPS 2 Day**

PRODUCT DETAILS

		Qty	Price	Total
IMAGE	Silver Petite Butterfly Diamond Necklace	1	\$129.00	\$129.00

ORDER SUMMARY

Total For Items:	\$927.00
Shipping and Handling:	\$19.75
Tax:	\$10.00
Total:	\$956.00

[SIGNATURE]

Thank you, etc

ACME Customer Service
1-888-555-1212

[FOOTER]

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