Checkout Summary Fields Addon

Purpose

Many new features in version 4.x.x such as:
- Modifiers can now be applied to fields
- Fields can be global (order based) or Product (only for specified products)
- Several defects have also been corrected.

Please read below for details.

Ever want to collect more information from your customers when they submit orders to your store? Collect order specific information like gift message or occasion. Collect marketing and demographic information like gender, how they heard about your store, their age, etc. The possibilities are endless. Similar to "options" on order items, the *Checkout Summary Fields* add-on allows you to define fields to be displayed to your customers upon checkout. The information is collected for an order, or now for order items.

This add-on allows you to specify and format "summary fields" in the summary section of the checkout process. As distributed, there are 5 fields pre-setup which demonstrate the basic "types" of fields that can be used. The currently supported types are:

Input – A normal text field. Length of the field can be specified in the Size field. Default value can be set in the default value field.

Textarea – A normal textarea field. Rows and Columns can be specified in the Rows/Cols fields. Default value can be set in the default value field.

Radio – Radio buttons. The names/values of the buttons are specified in the selector specification/default value field.

Checkbox – Standard checkbox. If 'ticked' in the admin area then the default will be 'checked'.

Select – A selection list. Names/values are specified in the comma-separated selector list. If the first character is a comma then it will be an empty selection with "-Select-" as the name.

There is a new link on the Design tab called "Checkout Summary Fields". You can add, delete or modify fields. There is no limit to the number of fields you can define.

As distributed, the fields defined are:
- Delivery Date – input field
- Gift Message – a textarea field

- Occasion – a dropdown select list
- Gift For – a set of radio buttons
- Include Gift Card – a checkbox

New with version 4.3.x, you can now specify the scope of a field. Scope can be either Global or Product. If Product, then on the Add-ons tab in the product detail page, you can select which of the Product fields should be applied to each product. These fields (and any modifiers) will be displayed in checkout ONLY when those products are in the cart.

Also new with version 4.x.x, you can specify a modifier and modifier type. Similar to order options, modifiers with Global scope and with modifier type of percent (%), apply the percentage to the order subtotal. Absolute ($) values are simply additional amounts charged to the order. If the scope is Product, then percentage modifiers (%) are applied against the total item price (price times quantity) and Absolute applies to each quantity of the item (quantity times modifier). For Product scope, there is an additional modifier called "Per order" which is a flat rate per item.

When the order is placed by the customer, the custom fields can now optionally be appended to the 'notes' associated with the order (compatibility with old method) separated by a blank line and then a line of 'Additional order data' (whether to apply to notes is now a add-on setting). Each field will follow (one to a line) with the title and the value. The titles are derived from the field names. I.e. gift_message gets translated to Gift Message. Language variables are automatically created when the field name changes or a new field is added.

For example, an order invoice for the customer notes might look like:

```
Customer Notes:
Please have the shipper leave the
package by the front door.  I work
during the day and our neighborhood is
secure.

Additional order data:
Delivery Date: 4/1/10
Gift Message: I thought you would like
this new book.  Enjoy, and happy
birthday.
Occasion: Birthday
Gift For: Child-boy
Include Gift Card: Yes
```

See below for a screen shot of the Checkout Summary Fields admin area and the Customer views on the checkout and invoice pages.

Each item that has a value (I.e. it's been selected or has content) is also listed along with the order items on the orders view page in both customer and admin areas. This information is also listed on the admin/customer invoices. If a modifier is applicable, then the name of the modifier is listed with the amount in the totals area of both the orders view pages and the invoices.

Operation

To being, click the Design tab in the Admin panel. Click the link named "Checkout Summary Fields". A list of the currently defined fields is displayed as well as a single blank line for entering a new field. Each column is described below.

Delete

To delete a field, check the checkbox in this column and then click Save.

Position

The position of the field displayed to the customer. Fields are presented lowest to highest. It is recommended to leave some separation between fields so new fields can be inserted at an interim position at a later time. Using positions incremented by 10 is usually a good idea.

Status

One of Active or Disabled.

Scope

One of Global or Product

Field Name

Field names should be alpha-numeric characters only. Special characters entered like a space character, period, apostrophe, etc. are converted to the underscore ('_') character. Titles for fields presented to the customer are derived from the field name. I.e. gift_message gets translated to Gift Message, how_did_you_hear_about_us gets translated to How Did You Hear About Us, etc.

Field Type

Select from many supported field types. Currently, field types are input, text area, select list, radio buttons and checkbox. These are translated to their HTML equivalents when displaying the fields.

Modifier

To be applied as described above.

Modifier type

One of $ (absolute) or % (percentage) applied as described above based on Scope.

Default Selection or Field Spec

Depending on the type of field selected as the *Field Type*, you may see one of several options based on the selected *Field Type*. For 'input' fields, you can specify the 'Size' (number of characters wide). For 'text area' you can specify the number of Columns and the number of Rows. For 'radio buttons' and 'select lists' you can select the default selection presented to the customer. For 'checkbox' fields, you can determine whether the default is checked or un-checked.

Variants or Default Values

Similar to the *Default Selection or Field Spec* this field's values are based on the *Field Type*. For 'input' and 'text area' types, you can specify the *default value* for the field. For 'radio buttons' and 'select lists', this field specifies the listed values. This is a comma separated list. If the first character is a comma (',') then the 'value' for that field will be empty and the customer will see '-Select-' indicating that they should choose a selection. The remaining comma-separated fields identify the value/name values for the 'select list' or 'radio buttons'. For example, using: `",Anniversary,Birthday,Holiday"` (without quotes) for a 'selection list' will present the customer with a Drop-down selector with elements of '-Select-', 'Anniversary', 'Birthday' and 'Holiday'. For 'radio-buttons', starting the list with a comma is ignored since it makes no sense. Otherwise the radio buttons will have the values of the list elements displayed. I.e. 'Anniversary', 'Birthday' and 'Holiday'.

Space Below

Each field is enclosed in paragraph tags in the Shipping step in checkout. Additional BREAK tags can be inserted between fields.

Set the number of BREAK tags to add additional spacing between the *Checkout Summary Fields.*

Clicking *Save* will save the current specification and make it immediately available to customers. Clicking *Reset* will revert to the last saved version of the summary fields.

Installation

Installation is as automatic as possible. It has been tested with version all versions since 2.0.12 through 4.3.x.

A download link will be enabled following capture of your payment. You will be emailed with the link to download the archive. Upon receipt of your order we will contact you to verify the Domain Name you submitted with the order and to send you the license key. This addon is licensed software. Failure to enter the license key and/or if the key does not match the domain where the addon is being used will cause the addon to be disabled. Please contact us if you encounter any problems if you feel you've entered the license key correctly and the domain name is accurate. Note: EZ Merchant Solutions customers do not need to enter a license key, it will default to using the cart license key if empty.

Installation Steps

1. After downloading the archive, extract it in the root of your store. This will "load" the addon into the system.
2. Go to Administration->Addons and click "Install" for the Checkout Summary Fields addon. This will install the addon and the needed files.
3. Click the *edit* link beside theCheckout Summary Fields addon and configure the settings you want. Be sure to enter the license key we sent you **exactly**. Then click Save.

   This will kick-off the internal installation of the needed *hook* for the addon to operate. You should see a green notification message indicating that the hook was installed successfully. If not, please contact us and we will direct you on how to manually install the hook.

The installation is now complete. To test, go through a checkout process. When you get to the summary section you will see the fields you have configured.

Customization

There are no customizations available for this addon outside the Design/Checkout Summary Fields settings.

Screen Shots

Several screen shots follow. The first is what the customer sees upon checkout.
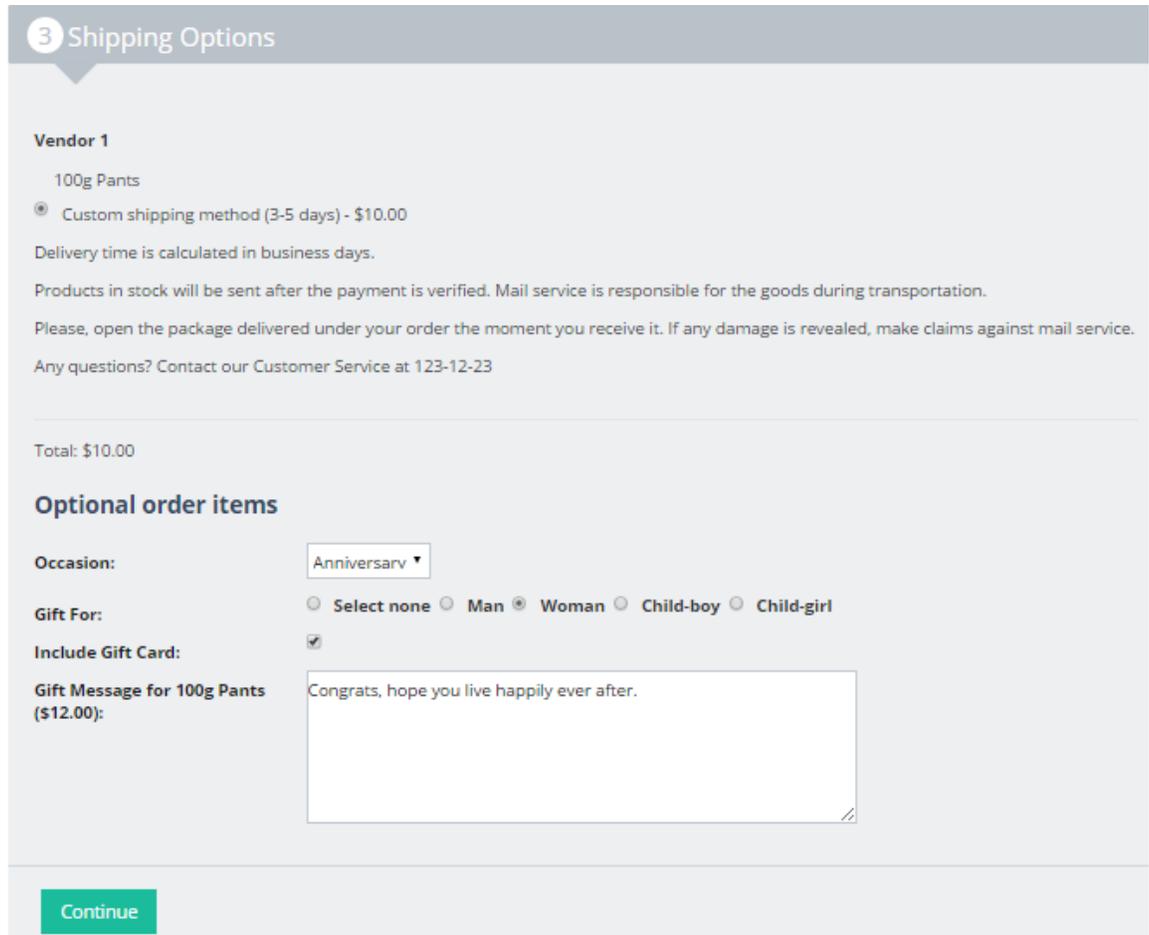
The second screen shot shows what the final order invoice looks like:

CODE: 0001205AF0
Options:
Color: Black/White/White;
Size: Small;

Price in points: 1500

adizero Rush Shoes CODE: L0078RO9Y9 Price in points: 5000	$100.00	1	$100.00
Occasion: New Arrival		1	
Gift For: Child-girl		1	
Include Gift Card: Y		1	
Gift Message for 100g Pants: Test message	$12.00	1	$12.00

Customer notes

Optional order items: Occasion: New Arrival Gift For: Child-girl Include Gift Card: Yes Gift Message for 100g Pants($0.00): Test message

Summary

Gift Message for 100g Pants:	$12.00
Payment method:	Phone ordering (Call to 5555555)
Shipping method:	Custom shipping method
Subtotal:	$130.00
Shipping cost:	$10.00
Total:	$152.00

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The third screen shot shows the addon settings page in the Design/Custom Summary Fields area.

Checkout Summary Fields

Delete	Position	Status	Scope	Field Name	Field Type	Modifier	Modifier Type	Req.	Default Selection Field Specs	Variants/Default Values (comma separated list)
☐	10	Disabled ▾	Global ▾	delivery_date	input ▾	0.00	$ ▾	☑	Size: 10	
☐	20	Active ▾	Global ▾	occasion	drop-down selector ▾	0.00	$ ▾	☐	Non ▾	Birthday,Anniversary,New Arrival,Christmas
☐	30	Active ▾	Product ▾	gift_message	text area ▾	0.00	$ ▾	☐	Cols: 60 Rows: 6	
☐	40	Active ▾	Global ▾	gift_for	radio buttons ▾	0.00	$ ▾	☐	Non ▾	Man,Woman,Child-boy,Child-girl
☐	50	Active ▾	Global ▾	include_gift_card	check box ▾	0	$ ▾	☐	☑	

Contact Us

If you have any difficulty you can contact us via one of the following contact points:

- Email – support@ez-ms.com
- Phone – (503) 906-3563

We will do our best to ensure you are satisfied.