TB 156 - ADD ABILITY IN THE PARTNER PORTAL FOR A PARTNER TO INITIATE SEND AN E-MAIL TO THEIR ECON CUSTOMERS

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Revision History

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| --- | --- | --- | --- |
| Version No | Date | Prepared by / Modified by | Significant Changes |
| 1.0 | 13-December-18 | Varsha | Initial draft |
| 1.1 | 3-January-19 | Varsha | Updated based on Ying’s and Mark’s comments. |
| 1.2 | 28-January-19 | Varsha | Updated Ying’s comments to change the DB table name and the corresponding places table is called in document. |
|  |  |  |  |

Reference

|  |  |  |
| --- | --- | --- |
| Name | Specification | Date |
| 1. | Requirement document attached in TB-156: Add ability in the partner portal for a partner to initiate/send and e-mail to their eCon customers. Intent is to be able to use to send marketing promotions,etc. http://13.253.197.78:8080/browse/TB-156 | 13-Dec-18 |
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# Overview

## Purpose of this Document

The purpose of this document is to explain the implementation of the new messaging tab in the Partner portal.

The document also includes the implementation approach and schema changes.

# Messaging Tab Changes

## New Messaging Tab

New Tab named “Messaging” is created in Partner Portal Tabs.

Position of Tab: “Messaging” tab is created to the right of “Promotions” tab.

Clicking on Messaging Tab opens page with three links on left side.

* Compose – To compose new mails to send or save them to send later.
* Groups – To create and maintain email message groups.
* Message Status – All sent emails and draft emails will be displayed here.

### Compose link

On clicking the compose link, partner is allowed to create new email and options are available either to save them or to send them.

* Screen title: List of Emails.
* Below the screen title, the over view section will be displayed. Overview view content will be displayed as bullet points. In the top right corner of the section close link is displayed. On clicking close link, the overview section will collapse.
  + Overview content is TBD.
* Below the overview sections, the buttons Add, Edit and Remove will be displayed horizontally in the written order.
* Below the buttons, a table with draft status emails will be displayed. The table contains two columns:
  + Subject: Displays the subject title of the template. The subject value will be in the form of a link. On clicking the link, it allows the partner to preview the email.
  + Date: Displays the date which the email was saved as a draft.

**Add Button:**

Clicking on the add button opens a new screen will open a new page with the following configurations

* + Screen Title: Email Compose
  + Below the screen title, the overview section will be displayed. Overview view content will be displayed as bullet points. In the top right corner of the section close link is displayed. On clicking close link, the overview section will collapse.
    - Overview content is TBD.
  + overview section.IS\_ENABLE
  + Beside the templates dropdown, a preview button is displayed. Clicking on the preview button will open a pop-up which displays the uploaded templatewith the partner merge tags updated. The merge tags that will be updated are partner company name, partner name/number/email and partner store registration link. Clicking on the preview button without selecting an Email Template, a pop up with message “Please select a template” is displayed.
  + Below the Templates dropdown, the following field is displayed:
    - Field name: “Subject”
    - The template header value will be populated in the subject field when template is selected from Email Template dropdown.
    - This text field is non editable.
  + Below the subject field, the field for email sender is displayed:
    - Field name: “From”
    - Partner’s email id will be populated in the field when the page is loaded.
    - This text field is non editable.
  + Below the from field, field show/include the email recipients are displayed:
    - Field name: “To”
    - Text box field to enter email ids manually is displayed to the right of the field name.
    - An “Add Group” button is displayed to the right side of the Field name text box. Clicking on the “Add Group” button, a new popup is opened which allows the partner to add groups.
      * Pop-up header: “Add Group”
      * Pop-up Content: Contains list of groups. Each row consists of checkbox, group name and group description.
      * Pop-up footer: Save and Cancel buttons. Save button adds the group names to the “To” field. SAVE CONFIRMATION MESSAGE “Groups saved successfully.”. Clicking on Save and Cancel fields will return to the prior screen.
      * The Add Group pop-up will be populated from the X\_PARTNER\_EMAIL\_GROUP table. Groups with the partner id will be fetched and displayed.
    - When a group is added it is displayed in double quotes. For example: “Group1”
    - In the “To” text area, both added groups and more than one individual email ids can be entered. A semi colon (;) is added for differentiation between each individual email id and to separate between the groups.

(*For example*: [xyz@abc.com](mailto:xyz@abc.com); “Group1”; [123@abc.com](mailto:123@abc.com); )

* + The following buttons are present below the from field.
    - These buttons will be center aligned in the page.
    - They will be displayed in the following order:
      * Send: Clicking on the send button will update the emails in EMAILMESSAGE table with low priority (3). Confirmation pop-up with message “Email sent successfully” will be displayed. Clicking the Ok button in the confirmation pop-up, the List of Emails page will be displayed.
      * Cancel: Clicking on cancel message will show a pop-up with message “You have modified content. Do you want to save the changes?” with yes and no buttons. Clicking on yes button will work same as the save button functionality. Clicking on “No” button will close the page without saving and go back to the Compose screen.
      * Save: Clicking on save button will save all information to the corresponding tables. The groups and individual email ids will be updated in [X\_PARTNER\_EMAIL\_RECIPIENT](#x_partner_emailrecipients) table and the rest of the details will be updated in the [X\_PARTNER\_EMAIL\_MESSAGE](#x_partner_emailmessages) table. The messages with empty data in the SENT\_DATE column is considered as the DRAFT status emails. Confirmation pop-up with message “Email saved successfully” will be displayed. Clicking the Ok button in the confirmation pop-up, the List of Emails page will be displayed.

**Edit Button:**

On clicking the edit button, opens a page which allows the partner to edit/send/save an email message which is in the draft status.

* Below the screen title, the overview section will be displayed. Overview view content will be displayed as bullet points. In the top right corner of the section close link is displayed. On clicking close link, the overview section will collapse.
  + - Overview content is TBD.
* Based on the selected email message, the page will display with subject, to, email message drop-down already populated.
* Any one email message should be selected to edit. Clicking on the edit button without selecting any email message will throw an info pop-up message “Please select an email”.
* Selecting more than one email message to edit will show a pop-up message “Please select one at a time”
* On clicking the edit button, similar page to the Email Compose page is displayed.
* Screen Title: “Email Compose”
* All the other features of the Edit Email page will be same as the Email Compose page.
* Clicking on save button in the Edit page will update the record in the X\_PARTNER\_EMAIL\_RECIPIENT table and X\_PARTNER\_EMAIL\_MESSAGE table.
* On clicking the send button, the values will be created in the X\_PARTNER\_EMAIL\_MESSAGE table with low priority which will sent based on the priority.

**Remove Button:**

* On clicking on the remove button, it allows the partner to delete an email displayed in the table.
* Any one email should be selected to remove. Clicking on the remove button without selecting any group will display a pop-up message “Please select an email”.
* Selecting more than one email to remove will show a pop-up message “Please select one at a time”
* After clicking the remove button, a confirmation pop-up with message “Do you want to remove the email?” with Yes/No button will be displayed. On clicking the Yes button, the email record details will be deleted from the table X\_PARTNER\_EMAIL\_MESSAGE and X\_PARTNER\_EMAIL\_RECIPIENT table and then the page will be returned to the prior page (List of Emails page) without making any changes. On clicking the No button, the page will be returned to the prior page (List of Emails page) without making any changes.
* After removing the email, a confirmation box with the message “Email removed successfully” will be displayed. Clicking on the Ok button in the confirmation pop-up, the List of Emails page will be displayed.

### Groups link

On clicking the groups link, partner is allowed to create new groups, modify the existing groups and delete them. A new page with the following details are displayed

* Breadcrumbs with Messaging > Groups is displayed on the top of the screen.
* Screen header: “List of Groups” is displayed.
* Overview section is displayed below the screen header. It is displayed as bullet points. In the top right corner of the section close link is displayed. On clicking close link, the overview section will collapse.
  + Overview content is TBD.
* Below the overview section, three buttons will be displayed horizontally in the following order.
  + Add
  + Edit
  + Remove
* Below the buttons, list of groups added for the partner is displayed. The list of groups will be fetched from the [X\_PARTNER\_EMAIL\_GROUP](#x_partner_emailgroups) table. Values will be fetched from the table based on the X\_PARTNER\_ID.
  + The table will contain two columns.
    - Name
    - Description.
  + Each row will consist of a checkbox, name and description.

**Add Button:**

On clicking the add button, a new screen with the following specifications is displayed. We can create new groups using this screen.

* Screen title: Add Group.
* Below the screen title, the overview section is displayed.
* Below the overview section, the group name field is displayed.
  + Field name: Group name.
  + Textbox field.
  + This field is mandatory.
* Below the group name field, group description field is displayed.
  + Field name: Group description.
  + Textbox field.
  + This field is not mandatory.
* Below the group description field, Email recipients’ dropdown box is displayed.
  + Field name: Email recipients
  + Drop down box with two values will be displayed. ‘All’ value will be selected as the default value. The values will be populated from the [X\_LOOKUP](#x_lookup) table
    - All
    - Customer
  + On selecting the ‘All’ value from the dropdown, all the unretired primary customers of the partner will be added to the group.
  + On selecting the ‘Customer’ value from the dropdown, all the customers unretired primary customer of the partner will be displayed as a table.
    - The table will consist of three columns:
      * Company Name – Company name of customer will be displayed.
      * Customer Name – The First Name and Last Name of customer will be displayed.
      * Email Enabled – This column will consist of checkbox. Checkbox will be unchecked by default and will be checked by partner as needed.
    - The customers that are selected will be updated in [X\_PARTNER\_EMAIL\_GROUP\_CUSTOMER](#x_partner_group_customer_details) table with the corresponding group id.
    - The displayed customer list table will consist of a maximum of 25 rows per page, after which additional pages will be displayed.
    - Record status, “# - # of # Records” will be displayed in the bottom left of the table.
    - “<<Previous” and “next>>” links will be displayed in the bottom right of the table to navigate through the different pages.
* Finally, the cancel and save button will be displayed. The buttons will be right aligned in the screen.
  + Cancel button – If changes are made and then cancel button is clicked a confirmation pop-up with text ‘You have modified content. Do you want to save the changes?’ is displayed. It consists of yes and no buttons. On clicking yes button, the same functionality as save button will take place. On clicking no button, page will exit and list of groups page will be displayed. On clicking cancel button, the confirmation pop-up will be closed and will stay in the Add Group page.
  + Save button – On clicking the save button, the values are saved to the new table X\_PARTNER\_EMAIL\_GROUP. And the customer details for customer email recipient type is saved in the table X\_PARTNER\_EMAIL\_GROUP\_CUSTOMER. Confirmation pop-up with message “Group created successfully” is displayed.

**Edit Button:**

On clicking the edit button, opens a page which allows the partner to edit a group which was already created.

* Based on the group selected, all field values will be populated in the page during display.
* Any one group should be selected to edit. Clicking on the edit button without selecting any group will display a pop-up message “Please select a group”.
* Selecting more than one group to edit will show a pop-up message “Please select one at a time”
* On clicking the edit button, similar page to the Add Group page is displayed.
* Screen Title: “Edit Group”
* All the other features of the Edit group page will be same as the Add Group page.
* Clicking on save button in the Edit page will update the record in the X\_PARTNER\_EMAIL\_GROUP table and X\_PARTNER\_EMAIL\_GROUP\_CUSTOMER table.

**Remove Button:**

* On clicking on the remove button, it allows the customer to delete an already created group.
* Any one group should be selected to remove. Clicking on the edit button without selecting any group will display a pop-up message “Please select a group”.
* Selecting more than one group to remove will show a pop-up message “Please select one at a time”
* After clicking the remove button, a confirmation pop-up with message “Do you want to remove the group?” with Yes/No button will be displayed. On clicking the Yes button, the group details will be deleted from the table X\_PARTNER\_EMAIL\_GROUP table and X\_PARTNER\_EMAIL\_GROUP\_CUSTOMER table and then the page will be returned to the prior page (List of Groups page) without making any changes. On clicking the No button, the page will be returned to the prior page (List of Groups page) without making any changes.
* After removing the group, a confirmation box with the message “Group removed successfully” will be displayed. Clicking the Ok button in the confirmation pop-up, the List of Groups page will be displayed.

### Message Status link

The purpose of this screen is to view all the messages that has been sent or saved as draft by the partner. Data will be fetched from the [X\_PARTNER\_EMAIL\_MESSAGE](#x_partner_emailmessages) table

* Breadcrumbs for message status as Messaging > Message status is displayed on the top left of the screen.
* Below the breadcrumbs, the Screen Title: “List of All Messages” is displayed.
* Below the screen title, a table containing three columns is displayed.
  + Subject Title – This will display the title of email sent. X\_PARTNER\_EMAIL\_MESSAGE.SUBJECT is displayed in this column.
  + Sent To – This will display all the groups/separate email ids that the email was sent to. The groups/email ids for an email sent or saved as draft will be fetched from the X\_PARTNER\_EMAIL\_RECIPIENT table.
  + Sent Date – The sent date field will display the date(X\_PARTNER\_EMAIL\_MESSAGE.SENT\_DATE) on which email was sent if it is in sent status or will the text ‘Draft’ if email is in draft status.
* Sorting will be available for all the columns of the table. Both ascending and descending sort will be enabled. The columns will be sorted in ascending order by default.
* The table will contain a maximum of 25 rows in a single page after which additions pages will be displayed.
* Record status, “# - # of # Records” will be displayed in the bottom left of the table.
* “<<Previous” and “next>>” links will be displayed in the bottom right of the table to navigate through the different pages.

# Schema Changes

We are using one existing tables and 4 new tables for this implementation.

**Table:** **X\_LOOKUP**

New parameters for email recipients is inserted to the table X\_LOOKUP.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ID | LOOKUP\_TYPE | LOOKUP\_ID | LOOKUP\_VALUE | CREATEDBY | EDITEDBY | CREATEDATE | MODIFIEDDATE |
| Auto Generated | PARTNER\_EMAIL\_RECIPIENTS | 1 | All | -1 | -1 | Date created | Date created |
| Auto Generated | PARTNER\_EMAIL\_RECIPIENTS | 2 | Customer | -1 | -1 | Date created | Date created |

Compose Screen Add/Edit/Remove functionalities will utilize the following two tables:

**Table:** **X\_PARTNER\_EMAIL\_MESSAGE**

|  |  |  |
| --- | --- | --- |
| **Column** | **Data Type** | **Remarks** |
| ID | bigint(20) | NOT NULL Auto-Generated |
| X\_PARTNER\_ID | bigint(20) | NOT NULL  Foreign Key |
| TEMPLATE\_ID | bigint(20) | Id of template selected in dropdown  Foreign Key |
| SENT\_DATE | datetime | Date when mail was sent. Updated when send button is clicked. If this field is NULL the status will be considered as draft |
| SENDER\_NAME | varchar(150) | Partner name |
| SENDER\_EMAIL | varchar(150) | Partner email address |
| SUBJECT | varchar(255) | Email subject |
| PRIORITY | int(11) | Low |
| CREATED\_BY | bigint(20) | Account user name |
| EDITED\_BY | bigint(20) | Account user name |
| CREATED\_DATE | datetime | Date created. |
| EDITED\_DATE | datetime | Date edited. |

In the X\_PARTNER\_EMAIL\_RECIPIENT table, entry will be created for all groups and individual email ids separately.

**Table:** **X\_PARTNER\_EMAIL\_RECIPIENT**

|  |  |  |
| --- | --- | --- |
| **Column** | **Data Type** | **Remarks** |
| ID | bigint(20) | NOT NULL Auto generated |
| X\_PARTNER\_EMAIL\_MESSAGE\_ID | bigint(20) | NOT NULL X\_PARTNER\_EMAIL\_MESSAGE.ID is updated here.  Foreign key. |
| X\_PARTNER\_EMAIL\_GROUP\_ID | bigint(20) | Group Id added in the TO field.  Foreign Key |
| EMAIL | varchar | Individual email address added in the “TO” field. |
| CREATED\_BY | bigint(20) | Account user name |
| EDITED\_BY | bigint(20) | Account user name |
| CREATED\_DATE | datetime | Date created. |
| EDITED\_DATE | datetime | Date edited. |

Groups screen Add/Edit/Remove screens will utilize the following two tables. When the EMAIL\_RECIPIENT\_TYPE is selected as customers, then the selected customer id will be updated in the X\_PARTNER\_EMAIL\_GROUP\_CUSTOMER table.

**Table:** **X\_PARTNER\_EMAIL\_GROUP**

|  |  |  |
| --- | --- | --- |
| **Column** | **Data Type** | **Remarks** |
| ID | bigint(20) | NOT NULL Auto generated |
| X\_PARTNER\_ID | bigint(20) | NOT NULL Partner id  Foreign Key |
| NAME | Varchar(150) | Value given in Group name field. |
| DESCRIPTION | Varchar(200) | Value given in Group Description field |
| EMAIL\_RECIPIENT\_TYPE | bigint(20) | 1(All) or 2(Customer) Value updated from LOOKUP table |
| CREATED\_BY | bigint(20) | Account user name |
| EDITED\_BY | bigint(20) | Account user name |
| CREATED\_DATE | datetime | Date created. |
| EDITED\_DATE | datetime | Date edited. |

When the group type is customer(2), the customers that are selected will be updated in the following table.

**Table:** **X\_PARTNER\_EMAIL\_GROUP\_CUSTOMER**

|  |  |  |
| --- | --- | --- |
| **Column** | **Data Type** | **Remarks** |
| ID | bigint(20) | NOT NULL Auto generated |
| X\_PARTNER\_EMAIL\_GROUP\_ID | bigint(20) | NOT NULL X\_PARTNER\_EMAIL\_GROUP.ID is updated here.  Foreign Key |
| USER\_ID | bigint(20) | User id of customers selected.  Foreign Key |
| CREATED\_BY | datetime | Account user name |
| EDITED\_BY | datetime | Account user name |
| CREATED\_DATE | datetime | Date created. |
| EDITED\_DATE | datetime | Date edited. |

# Queries and Clarification

1. In the Groups link sub menu, should we have character limit restriction for the Group name and group description text boxes?

Ans: No (Ying / Dec 18, 2018)