PM-Partners Booking Widget

Purpose

The PM-Partners Booking Widget is a WordPress plugin intended to replace the existing Arlo plugin used by PM-Partners wordpress website. The reason for replacement were determined to be the following limitations:

- Utilize the WooCommerce cart and checkout
- Allow for courses to run across multiple days
- Bundle multiple courses into one product and provide for the date selection before adding to cart

The widget leverages the WooCommerce Product, Attributes and Variations to store course and workshop information, including types, locations and dates. The Widget enables a shortcode that can be added to pages that will provide the core widget functionality, which should be embedded into product pages. Customers can book courses from the Widget which will add them to the cart. They can then use the WooCommerce cart to checkout and confirm payment.

Installation

Prerequisites

- Access to the WordPress WP-Admin site, and permissions for installing Plugins
- Access to either the, git repository, src files or zip file of the Booking Widget plugin.

Step 1: Acquire or Downloading the Plugin

1. Go to the GIT repository website of the plugin repository.
2. Click on the "Code" button and then or "Download Zip" button.

Step 2: Installing the Plugin

Option A: Manual Installation via WordPress Admin Dashboard

1. Login to your WordPress admin dashboard (e.g., https://www.pm-partners.com.au/wp-login.php).
2. In the left-hand menu, navigate to "Plugins" > "Add New."
3. Click the "Upload Plugin" button located at the top of the page.
4. Choose the plugin .zip file you downloaded earlier and click "Install Now."
5. WordPress will automatically upload the plugin, and once the installation is complete, click "Activate" to activate the plugin.

Option B: Manual Installation via FTP

1. Extract the .zip file you downloaded earlier to your local computer.
2. Connect to your website via FTP using an FTP client (e.g., FileZilla).

3. Navigate to the /wp-content/plugins/ directory on your server.

4. Upload the extracted plugin folder to the /wp-content/plugins/ directory.

5. Once the upload is complete, log in to your WordPress admin dashboard.

6. In the left-hand menu, go to "Plugins."

7. Find the [Plugin Name] in the list of plugins and click "Activate" to activate the plugin.

Step 3: Testing the shortcode

1. Create a test page that uses the "Grouped course" parent and default template

2. Add the following shortcode as an element in the body of the page:

```
1    [pmproducts skus="W10352" product-bundle-ids="15290"]
```

3. Save the page and then open the page in another browser window.

4. Confirm that the plugin is working correctly

Scope

The PM-Partners Booking Widgets primarily responsibility is to provide, via an embedded shortcode, a list of appropriate courses and packages that can be filtered by Type or Location. A button allows the customer to select dates and book via a "Book Now" button.

1. In-scope Components

- Plugin widget:
    - Accessible via a shortcode for embedding
    - Contains embedded CSS for styling
    - Frontend JS modules for filtering courses and packages
    - Book Now button for adding to the cart
- Workshops tab in WooCommerce admin for displaying active and expired widgets
- Documentation for adding courses and workshops via REST API

2. Out-of-scope Components

- WooCommerce configuration and payment
- Development of WooCommerce cart page and checkout
- Synchronization/integration tools for SFDC courses

Dependencies

The plugin requires the following pre-requisites and dependencies:

```
1    WooCommerce v7.8.2 or greater
2    WooCommerce Product Bundles v6.22.1 or greater
```

In addition, the REST API for WooCommerce is required to create courses and workshops, modify courses - including setting limited stock, special pricing, or meta fields.

Creating Courses: https://woocommerce.github.io/woocommerce-rest-api-docs/#create-a-product

Creating Workshop: https://woocommerce.github.io/woocommerce-rest-api-docs/#create-a-product-variation

The REST API can also be used for:

Edit Workshops: https://woocommerce.github.io/woocommerce-rest-api-docs/#update-a-product-variation

Cancel Workshop: https://woocommerce.github.io/woocommerce-rest-api-docs/#delete-a-product-variation

Data Model

Native WooCommerce products are utilized for offering courses and workshops.

Products: The "product" entity is used to store Courses. Products contain a SKU, a name and a default price (all required). Products must use the type "variable" to allow for Workshops to be added. Products in woocommerce also determine the attributes that are applicable, so the attributes "WorkshopId", "Type", "Location", "StartDate", and "EndDate" should be defined in the attributes (no defaults or lists are needed).

Variations: Variations within a product are used to store Workshops. Workshops are stored for a specific course, and define values for regular or sale price, along with attributes "WorkshopId", "Type", "Location", "StartDate" and "EndDate". A workshop is required to have at least regular price, and attributes "StartDate" and "EndDate" in order for it to be purchasable.

StartDate and EndDate are required to be formated as "dd/MM/yyyy". This is a predetermined format for display, as well as for determining if the course is expired.

Field	Type	Example
WorkshopId	String	a0U6900001XL7G0
Type	String	Foundation
Location	String	Hybrid Sydney
StartDate	String	3/12/2023
EndDate	String	4/12/2023

For Products/Workshops to show in the widget the following criteria must be met:

- Products must be of type "variable" and be marked as "in_stock", have a regular price and a sku.

- Products must have a least one Variation, and that variation needs to have a regular price, a StartDate and EndDate, and also must be marked as "in_stock".

- Once the current date is equal to or greater than the workshop StartDate, then the workshop is considered expired. The workshop will no longer be available for users to book, and it will show in red in the workshop tab for administrators. Expired courses are still shown as variants, and attendee info captured in WooCommerce will remain. No intervention from administrators is required for courses to expire, however eventually workshops should be cleaned up by removing the variation.

- Workshops can be cancelled by removing the variation. If using the REST API: https://woocommerce.github.io/woocommerce-rest-api-docs/#delete-a-product-variation

Limited Stock Flag

Enabling the "Limited Stock" flag will show a flag on a workshop letting users know that a limited number of seats are available for that workshop. The flag will show by using the stock quantity feature in WooCommerce. To do so, the "manage stock" flag needs to be set to true, and then the stock level needs to drop below 500 in order for the flag to show. If using the REST API, the following PUT method will enable the flag:

```
1   Endpoint: /wp-
    json/wc/v3/products/{product_id}/variations/{variation_id}
2   Body:     { "manage_stock": true, "stock_quantity": 499 }
```

Special Price Flag

Enabling the "Special Price" flag will display the regular price crossed out, and show a special price in red for the workshop. This is done via the "sale_price" field in woocommerce. If using the REST API, the following PUT method will enable the flag:

```
1   Endpoint: /wp-
    json/wc/v3/products/{product_id}/variations/{variation_id}
2   Body:     { "sale_price": 999 }
```

FooEvents - Meta Fields

FooEvents is a plugin that exposes event like features to woocommerce. For PM-Partner courses, meta fields attached to products expose further functionality on the checkout page. By configuring these meta fields, the following functionality is enabled:

Meta Field	Value	Functionality
WooCommerceEventsEvent	Event	Required for the following 4 event capture fields
WooCommerceEventsCaptureAttendeeDetails	On	Prompts for the attendee's name field
WooCommerceEventsCaptureAttendeeEmail	On	Prompts for the attendee's email field
WooCommerceEventsCaptureAttendeeTelephone	On	Prompts for the attendee's phone field
WooCommerceEventsCaptureAttendeeDesignation	On	Prompts for the attendee's job role field
fooevents_custom_attendee_fields_options_serialized	See JSON	Optional: prompts user for delivery method if the course offers a hybrid location (needs to be set at the product level)

The attached REST request examples shows an example of how to set these Met Fields via the REST API, and also contains the JSON for the delivery method prompt.

Packages: Packages are specific courses that can be grouped together. These are offered by creating a "Product Bundle" in the "Product bundles WooCommerce plugin". Via that plugin, the administrator needs to add a new product, then from the "bundled products" tab, Courses (as defined as products) need to be added. Product bundles will also have their own discount price. Once configured, the product_id should be noted, for placement into the shortcode.

Front-end Widget

The Core widget is used by placing the following shortcode onto a page:

```
[pmproducts skus="{}" product-bundle-ids="{}"]
```

Two parameters are used to determine which products to show:

skus - a comma seperated list of sku identifiers for the courses. eg: W13002,W13202

product-bundle-ids - a comma seperated list of WooCommerce product bundle ids, as shown in the woocommerce product list (type of products must be "bundle", which is a product type defined by the WooCommerce Product Bundles plugin)

Once displayed, the widget displays a list of matching products. Users can filter by Type and Location if applicable.

WooCommerce Admin - Workshops Tab

The Workshops tab is used by administrators to see which workshops are available for a course. Only product variations that are identified as "is_purchasable" will show.
In addition, the "variations" tab is disabled as the UI is not able to create or edit workshops. The variations tab can only be used as a reference to see all variations.

Note: Courses with a Start Date in the past are considered expired and will not be available for users to book. They will show as "red" in the workshops tab, and will not show in the front-end widget.

Additional Resources

WooCommerce: https://wordpress.org/plugins/woocommerce/

WooCommerce Product Bundles: https://woocommerce.com/products/product-bundles/

Source Code: https://github.com/intercollector/pm-partners-booking-widget

WooCommerce Rest API: https://woocommerce.github.io/woocommerce-rest-api-docs/#introduction

☐ E.g. is this part of the free plan?