(Approved) 06.2 Installment Plans - Add New
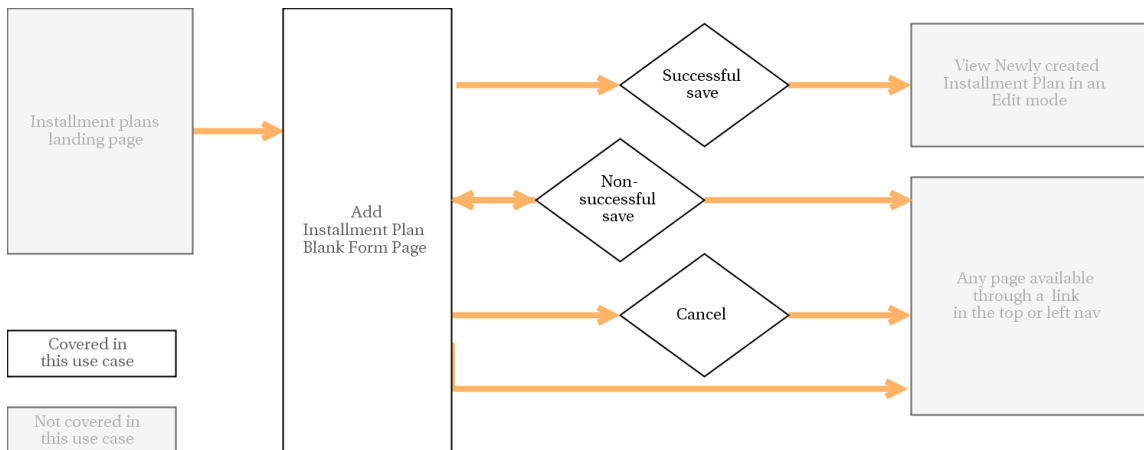
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General Description

Creating new installment plan - by filling out the form and saving it.

Flow Chart

Pre-Condition	User is on Installment plans page and has rights to add installment plans
Trigger	Click on "Add installment plan" button
Process	User opens Add Installment plan page, fills out the form and saves new Installment plan.
Post-Condition	Initial draft of the Installment plan is saved, user remains on the new Installment plan page.

Business Rules

User types that have access	Add/Edit rights
Assumptions	User has access to adding/editing installment plans

Typical Behavior	There are straight % based or fixed $ amount based installments in a plan
Alternate Behavior - 1	Add and Remove installments from a plan
Alternate Behavior - 2	Installments types are mixed $ and % values and Switching Installment type

Data Elements

PAGE ELEMENTS

Type	Value
Breadcrumbs	Brand name / Installment plans / Add installment plan
Configuration status	Draft
Operational mode	Not yet published
Page header	Add installment plan

ADD INSTALLMENT PLAN FORM

Label	Options	Default Value	If Required	UI Element	Comments/Conditions
Operational mode block					Described in Operational Mode Block
Title	n/a		Yes	Text field	Validation: 50 characters limit
Description	n/a			Text area with formatting controls (Formatting text in a text area)	Validation: 1000 characters limit
Currency	• USD	USD	Yes	Checkbox	Not editable for MVP
Split Sh&H	• Add to 1st • Split among all	Add to 1st		Radio Box	"Add to 1st" equals unchecked flag "Split among all" equals checked flag
Split Tax	• Add to 1st • Split among all	Add to 1st		Radio Box	"Add to 1st" equals unchecked flag "Split among all" equals checked flag
Installments Array (minimum of 2 installments to be shown by default)					For each installment added by user, at the end "Remove" button is displayed. Default 2 first installments are not removable. Number of installments that user can add is unlimited.

Installment type	• $ • %	$	Yes	Radio Box	**Validation** • Can not select Initial installments in % and latter installments in $ • Can not change installment type starting with second selected % in a list
Delay in days		1st installment - 0 2nd and added by user installments - 31	Yes	Text Field	**Validation** • If numeric value
Installment Value	n/a	• If % is selected, default is 50%/50%	Yes	Text field	**Validation** ■ If numeric value ■ If $ then maximum value is six non-fractional digits ■ If % then must be between 0 and 100 (inclusive), with up to three decimal places
Total	n/a			Text field	• Not editable. • Displays added percentage values if percentages or mixed values are selected. • Displayed added $ values if only $ values are selected • For all % fields default values are an even split between installments to total 100% • If new installments are added, recalculate even split between all % installments to total 100%
FORM BUTTONS					
	1. Save 2. Cancel			Button	

There are straight % based or fixed $ amount based installments in a plan

- There are 2 default installments in every new installment plan. Default rules are:
  - Select Installment type: $
  - Default Delay in Days
    - First installment: 0
    - Second Installment: 31
- Default "Value" type is set to $.
- Total is empty until user starts entering values
  - As soon as user starts inputing values, Total will reflect input values and calculate dynamically.
    - Example: if user only enters $9.99 in the first field, total will show $9.99. When the second value is entered, total will update to the sum of first and second field.

- If user switches all installments to %, "Value" field converts to % and by default total will reflect 100% and it will be equally split among all selected % fields.
- Value field is editable, so if user updates % value for one of the installments, total 100% will be dynamically recalculated between the rest of the fields.
  - Example: if there are 3 installments, and default view is 33.33% - 33.33% - 33.33%, when user changes first installment to 50%, the rest 2 installments will dynamically change to 25% - 25%
- Starting from the Second installment in %, installment type selection will be deactivated. If user started to enter Installment Values in %, they should continue in %. They still have an option to switch back to $. Then Selecting Installment type will become available again.

Error display

Products
Pricing
Shipping
Installment Plans
Renewal Plans
Return Policies
Marketing Package
Publish Center

Meaningful Beauty / Price categories / Add Installment Plan

DRAFT   NOT YET ACTIVE

Add Installment Plan

OPERATIONAL MODE MANAGEMENT PLACEHOLDER

INSTALLMENT PLAN TITLE*

Installment plan title is required   50 characters

INSTALLMENT PLAN DESCRIPTION*

Installment plan description

1000 characters

SHIPPING AND HANDLING   TAX   CURRENCY*
ADD TO 1ST   SPLIT AMONG ALL   ADD TO 1ST   SPLIT AMONG ALL   ✓ USD

Installments   + ADD INSTALLMENT

INSTALLMENT TYPE*   DELAY IN DAYS*   VALUE*
① $ %   0 $9.99
② $ %   31   50%
③ $ %   31   50%   ⊗

TOTAL
100%

CANCEL   SAVE

Success confirmation message display.

Products
Pricing
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Installment Plans
Renewal Plans
Return Policies
Marketing Package
Publish Center

Meaningful Beauty / Price categories / 3-Pay $9.99 plus even split - Edit

DRAFT   ACTIVE

SDFH304SJ | 3-Pay $9.99 plus even split

Installment plan was saved successfully.

OPERATIONAL MODE MANAGEMENT PLACEHOLDER

ID*   INSTALLMENT PLAN TITLE*
SDFH304SJ   3-Pay 29.99 plus even split
                                              50 characters

INSTALLMENT PLAN DESCRIPTION*
Installment plan description

1000 characters

SHIPPING AND HANDLING   TAX   CURRENCY*
ADD TO 1ST   SPLIT AMONG ALL   ADD TO 1ST   SPLIT AMONG ALL   ✓ USD

Installments

INSTALLMENT TYPE*   DELAY IN DAYS*   VALUE*
① $ %   0 $9.99
② $ %   31   50%
③ $ %   31   50%   ⊗

TOTAL
100%

CANCEL   SEND FOR APPROVAL   SAVE

System Messages

Conditions	System Message	Message Occurence
User successfully saves Installment plan	Installment plan was added successfully.	After object was saved (created)

Confirmation Messages

Field	Conditions	Trigger	System Message Header	System Message	Confirmation buttons
Inactivation date	Inactivation date is set in the past	Click on Save button	Confirm inactivation of Installment plan	Inactivation date is set in the past. This will put the Installment plan in Inactivated operational mode. Please, confirm.	• Confirm • Cancel

Error Messages

Field	Trigger	Conditions	Error Message
Title	Save button clicked	Value is not entered	Title is a required field.
Currency	Save button clicked	Value is not selected	Currency is a required field.
Delay in days	Delay in days is filled	Non-numeric or non-integer value is entered	Delay in days must be a whole number.
Delay in days	Save button clicked	Delay in days is not filled	Delay in days is a required field.
Installment Value	Installment Value is filled	If $ type is selected, non-numeric value, negative value, or value that is more than six non-fractional digits	Fixed installment values must be between 0 and $999,999.
Installment Value	Installment Value is filled	If % is selected, non-numeric value, negative value or value that is more than 100 is selected.	Percentage installment values must be between 0 and 100.
Installment Value	Save button clicked	Value is not entered	Installment Value is a required field.