



Magento 2 Extension

( Version 1.0.0 )



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## Introduction to Advanced Sample Orders

In B2B or B2C ecommerce platforms, customer prefers to try a sample product before placing bulk order. In general both sample and regular orders are processed in same way. This requires admin to manually make changes for sample product buyers. It's a tedious and time consuming method.

Advanced Sample Orders Extension help customers to order samples prior to bulk purchase. Here, the sample order is processed as regular order but seller can customize, like lowering the price, restricting number of samples and more. Advanced Sample Order also provides analytical information which will be helpful in getting business insights from people who places bulk order.

## Features

- Administrator can restrict ordering samples to a specific product / customer group.
- Allow us to configure the prices for a sample both products level and in general level.
- Available for Simple, Configurable, Grouped and Bundle Products.
- Store owners can limit the number of maximum samples which can be placed in a order.
- Store owners can set different types of price structure for samples. It can



be fixed price or percentage of regular price.

*For e.g., 200% of original price. Fixed price option will not be applicable to configurable, grouped and bundle product since the prices are dynamic as per user selections.*

- Allow us to process both samples and normal products in a single order.
- Allow us to provide free samples too.
- It is easy to identify the sample products in any order both in frontend and backend.

## Version & Compatibility Support

**Version:** 1.0.0 Stable

**Compatibility:**

This extension is compatible for Magento Community 2.x and Magento Enterprise 2.x versions.

## How to Install This Module?

**Step 1:** Download the extension from My Downloadable Products in your account from our store or download the package from Magento Marketplace.

**Step 2:** Create a directory `app/code/DCKAP/AdvancedSampleOrders` in your Magento root directory and unzip here.



**Step 3:** Disable the cache to avoid flushing the cache, very often. It may affect performance for a while. However, you can skip this step. If you do so, clean the cache manually whenever needed.

***php bin/magento cache:disable***

**Step 4:** Enter the following at the command line to enable the module.

***php bin/magento module:enable DCKAP\_AdvancedSampleOrders***

**Step 5:** Enter the following at the command line to run the setup scripts.

***php bin/magento setup:upgrade***

**Step 6:** Enter the following at the command line if the mode is set to default or production to deploy all the static files.

***php bin/magento setup:static-content:deploy***

**Step 7:** Clear the cache to configure the settings in backend (if you skipped Step3)

***php bin/magento cache:clean***

**Step 8:** Login to Magento backend and navigate to [Store > Configuration > DCKAP > Advanced Sample Orders](#) and configure the module.

**Step 9:** Clear the cache to apply all the configurations (if you skipped Step3)

***php bin/magento cache:clean***



**Step 10:** Enable the cache once everything is done. Ignore, if you skip Step3.

***php bin/magento cache:enable***

That's it. You are done. If you still face any issues while installing, contact us at

[extensions@dckap.com](mailto:extensions@dckap.com)

## General Configuration

<b>Enabled</b> <small>[store view]</small>	Yes	▼
<b>Allow / Restrict Samples by Products-wise</b> <small>[store view]</small>	No	▼
	If YES, Admin can able to allow / restrict the Sample for each Product.	
<b>Maximum Sample Limit</b> <small>[store view]</small>	10	
	Customers/Guests can order maximum samples given above. If 0, no limitations. Should not be more than 100.	
<b>Allow Only LoggedIn Customers</b> <small>[store view]</small>	No	▼
	If Yes, only logged-in customers can able to order samples.	

- Select **Enabled** to Yes for enabling the module.
- Select **Allow/Restrict sample order option by product-wise** to Yes for restricting the samples by product-wise.
- Specify **Maximum Sample Limit** to any numerical value to limit the



maximum number of samples per order.

- Select **Allow only logged-in customers to order samples** to Yes for restricting guest users to order samples.
- If above one is selected to Yes, Select the **customer groups** to restrict sample option only to specific groups.

## Price Configuration

**Price Type**

[store view]

Percent

Fixed will not be applicable for configurable, bundle and grouped product. If Fixed is selected, by default, percent will be considered.

**Amount**

[store view]

50

If price type is percent, then the price will be n% of original price where n is above defined value. Should not exceed 6 characters.

- Select **Price Type** to Fixed (for fixed price) or Percent (for percentage of regular price).
- Provide a numerical value (fixed price or percentage depends on above option) to **Amount** field.



## Sales Analytics Configuration

**Status**  
[store view]

Ordered
Shipped
<b>Invoiced</b>
Backordered
Returned
Refunded
Canceled

Above status is used to track the order conversion. For eg, Assume Invoiced is selected, and if a new order is placed, our algorithm tracks the last ordered sample with status Invoiced. Default value is Invoiced.

**Note: Changes made here will affect only in upcoming orders. It is highly not recommended to change the status once configured to use.**

**Days**  
[store view]

Tracks the samples only ordered before given 'n' days. Should not be more than 300 days.

- Select **Order Item Status** to indicate the order item is completed. It is used for tracking order conversion. For e.g., Assume Invoiced is selected and if a new order get placed, our algorithm tracks the last ordered sample with status Invoiced.
- Provide a numerical value for **Days** field.



**NOTE: Changes made here will affect only in upcoming orders. It is highly not recommended to change the status in Sales Analytics Configuration once configured to use.**

## Sample Product Information

Allow Sample  Yes  
[global]

Apply Product Price  
[global]

Use Base Config ▼

If Use Base Config is selected, below prices will not be considered (General price configuration will be taken)

Price Type  
[global]

Percent ▼

Amount  
[global]

If price type is percent, then the price will be n% of original price where n is above defined value

If **Allow/Restrict sample order option by product-wise** to Yes in general configuration, this information will be considered.

Select Apply Product Price to any of below options

- **Use config** - general price configurations will be considered irrespective of this product specific configuration.
- **Use actual price** - original price of the product is considered.
- **Use below price** - below price configurations will be considered irrespective of these general configurations.

Once the configurations are done, sample option will be available in front-end.



## Product Detail Page



### Strive Shoulder Pack

★★★★★ 2 Reviews [Add Your Review](#)

**\$32.00**

**IN STOCK**  
SKU#: 24-MB04



Qty

1

*Order Samples*



Add to Cart

Add Sample to Cart  
(for \$10.00)

 ADD TO WISH LIST  ADD TO COMPARE  EMAIL

This is how product detail page will look in real time once the Advanced Sample Order module is enabled. By default quantity will be set to 1 when customer/guest try to add sample (even they set quantity more).

Advanced Sample Order module does not allow customer/guest to add more than one sample of same product.

## Shopping Cart

Sample Products are highlighted with keyword (SAMPLE) to differentiate from normal products. Customer/Guest cannot edit the sample.



## Shopping Cart

Item	Price	Qty	Subtotal
 Strive Shoulder Pack ( SAMPLE ) <i>Sample Product</i>	\$10.00	1	\$10.00

Gift options ▾ 🗑️

[Update Shopping Cart](#)

Apply Discount Code ▾

Summary

Estimate Shipping and Tax ▾

Subtotal \$10.00

Tax \$0.00

**Order Total \$10.00**

[Proceed to Checkout](#)

[Check Out with Multiple Addresses](#)

Also the quantity is fixed to 1. Customer/Guest are not allowed changing the quantity of sample.

## Customer Account – Recent Orders & My Orders

### My Orders

*Indicates whether order has sample products or not*

Order #	Date	Ship To	Order Total	Sample	Status	
000000044	9/21/16	Veronica Costello	\$39.64	No	Pending	<a href="#">View Order</a>   <a href="#">Reorder</a>
000000043	9/21/16	Veronica Costello	\$15.83	Yes	Pending	<a href="#">View Order</a>
000000042	9/20/16	Veronica Costello	\$69.28	No	Processing	<a href="#">View Order</a>   <a href="#">Reorder</a>
000000041	9/20/16	Veronica Costello	\$59.54	Yes	Processing	<a href="#">View Order</a>
000000040	9/8/16	Veronica Costello	\$63.87	Yes	Pending	<a href="#">View Order</a>

Items 1 to 5 of 38 total

Allows customer to easily identify any order has sample products or not in



Dashboard and My Orders pages itself.

## Customer Account – Order Detail Page

Items Ordered				
Product Name	SKU	Price	Qty	Subtotal
Strive Shoulder Pack ( SAMPLE )	24-MB04	<b>\$10.00</b>	Ordered: 1	<b>\$10.00</b>
<i>Sample Product</i>			Subtotal	\$10.00
			Shipping & Handling	\$5.00
			Tax	\$0.83
			<b>Grand Total</b>	<b>\$15.83</b>

As similar to shopping cart, a customer can easily differentiate sample products and normal products in order/invoice/shipment/credit-memo detail pages.

## Backend - Orders

Search by keyword

Filters
Default View
Columns
Export

Actions

42 records found

20 per page

1 of 3

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Status	Grand Total (Purchased)		Action	Sample
00000044	Main Website Main Website Store Default Store View	Sep 21, 2016, 4:09:00 AM	Veronica Costello	Veronica Costello	\$39.64	Pending	\$39.64	<input type="checkbox"/>	<a href="#">View</a>	No
00000043	Main Website Main Website Store Default Store View	Sep 21, 2016, 4:09:00 AM	Veronica Costello	Veronica Costello	\$15.83	Pending	\$15.83	<input type="checkbox"/>	<a href="#">View</a>	Yes



Store Owners can segment orders based on order which has sample products or not. So that, it will be easy for store owners to manage the orders.

## Backend – Order Detail Page

✓ This Order contains Sample Product(s).

Customer History ( All Products )



ORDERED	2
SHIPPED	1
INVOICED	2
BACKORDERED	0
RETURNED	0
REFUNDED	0
CANCELED	0

Customer History ( Specific to this Order - last 10 items)

ORDER	PRODUCT NAME	ORDERED ON	STATUS
#00000041	Strive Shoulder Pack	Sep 20, 2016	Invoiced

*\* Provides information about previous sample orders*

*\* Decision making on customer trustability*

*\* Helpful for processing the order*

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Strive Shoulder Pack ( SAMPLE )	Ordered	\$32.00	\$10.00	Ordered 1	\$10.00	\$0.83	8.25%	\$0.00	\$10.83

SKU: 24-MB04

In Order page, Store Owner can find a new section containing historical information of the customer and other details related to the order which has sample products. It will be helpful in decision making on processing the sample product.

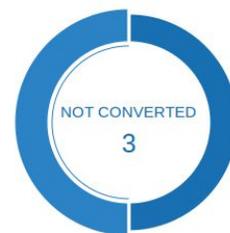
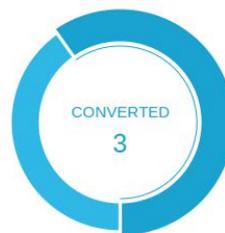
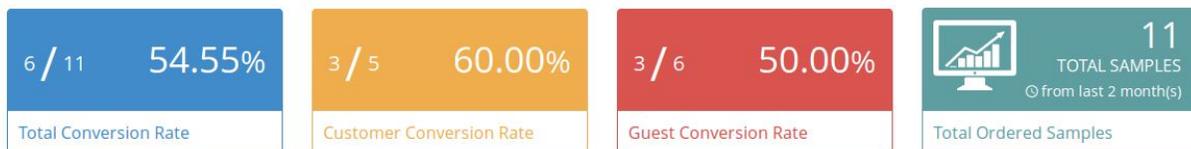
- It contains the status of all the samples ordered by the customer/guest.
- Also it contains the previous sample products status information related to the ordered sample products.



## Sales Analytics - Dashboard

Advanced Sample Orders module provides detailed analysis on samples. It is useful for keep tracking of business. It is more useful for store owners to identify following things.

- Conversion Rates (All, Customers & Guests)
- Total number of samples ordered & samples converted & samples completed.
- Segmenting all the samples based on status.
- Segmenting Customer Samples and Guest Samples.



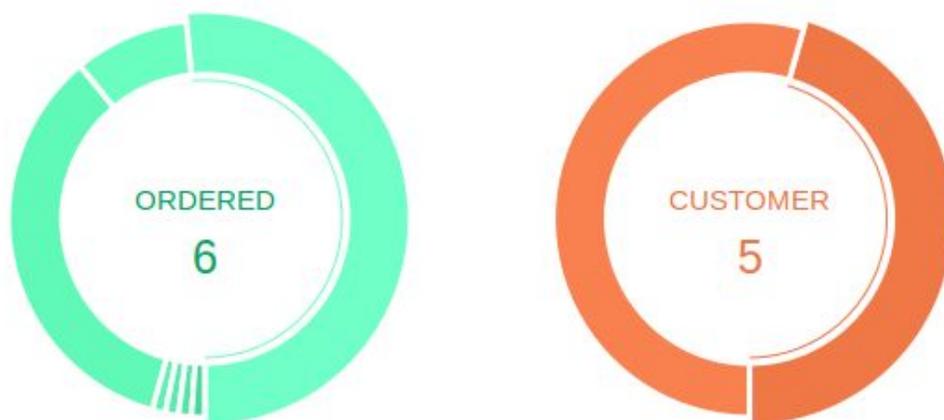
## Conversion Rates



The **conversion rate** is the percentage of users who take a desired action on ordering the products after satisfied with the sample purchased earlier. Total Conversion Rate comprises both the customers and the guest users conversions.

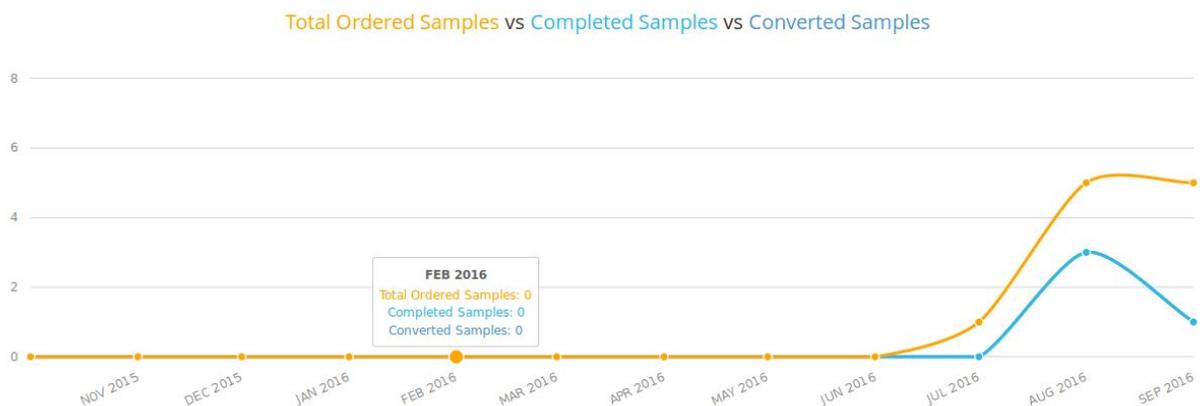
Conversion Rate helps us to understand the conversions better and to distinguish the data between the customers and guests.

## Samples By Status & Conversions by User Groups



This donut chart helps store owners to identify samples by the status of the orders. It distinguishes the samples based on the statuses. Other charts displays the conversion rates in total numbers.

## Last 12 month graph



It provides a valuable information of all the samples with sufficient data like how many samples are ordered, from that how many are processed and most importantly, how much are converted amongst them.

Sales Analytics provided, helps the store owners to understand whether providing samples for the products helps their business to improve sales or not.

It also helps to improve the quality of the product if most of the users only purchases the samples and if those are not converted in specified interval.



## Key Notes

- Product specific configurations will be available only if **Allow/Restrict sample order option by product-wise** option is selected to Yes in general price configurations.
- Fixed prices option will not be applicable to **configurable, grouped & bundle** product since the prices are dynamic as per user selections. However, percentage of final price of respective product will be applicable.
- If the product type of general price configuration is selected to Fixed, it will be ignored and by default, **percent will be considered** for configurable, grouped and bundle products.
- For complex product types (such as configurable, grouped & bundle), if product specific price configuration is enabled, then the parent product specific configurations will be considered irrespective of its child products.
- Error message will be displayed, when user tries to add samples of same product more than once into shopping cart. This helps in preventing users to add same product samples multiple times.
- Error message will be displayed, when user adds a sample if the cart already contains the same normal product with same options.



- Error message will be displayed, when user tries to add a normal product only if the shopping cart already contains the same sample product with same options.

## Contact Information

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