

Estimated Delivery Date

blackbird

Extension for Magento 2



User Guide

Estimated Delivery Date	1
Intro	2
Installation	2
Features	2
How it works?	3
1- Define the days-off	3
1.1- Create Groups of days-off	3
1.2- Set rules for holidays and days-off	4
2- Manage Product Preparation time	6
3- Manage Shipping time and delivery dates	9
4- Message personalization and translations	10
Translation management	10
Message customization	11

Intro

By providing a crucial reassurance element to your customers this **Estimated Delivery Date** extension by **Blackbird** is really made to help you to improve your conversion rate of your Magento 2 store.

It allows you to create very advanced rules for preparation and shipping time thanks to **conditions**, like the native promotion tool of Magento, you will be able to use all the existing attributes to cover infinite possibilities.

You will also be able to **exclude days off and holidays** and **personalize** the message and manage the translation per store view.

Users are used to rely on these information on major eCommerce sites (Amazon, Asos...). Thus, **preparation** and **delivery dates** are considered as reassurance elements and they will contribute to enhance trust towards your ecommerce store and eventually convert more.

Installation

To install Estimated Delivery Date :

1. Extract files from the compressed package in your Magento root
2. Enable the module php <your Magento install dir>/bin/magento module:enable --clear-static-content Blackbird_EstimateTimeShipping.
3. Run command php <your Magento install dir>/bin/magento setup:upgrade.

To update Estimated Delivery Date:

1. Extract files from the compressed package in your Magento root
2. Run command php <your Magento install dir>/bin/magento setup:upgrade.

Features

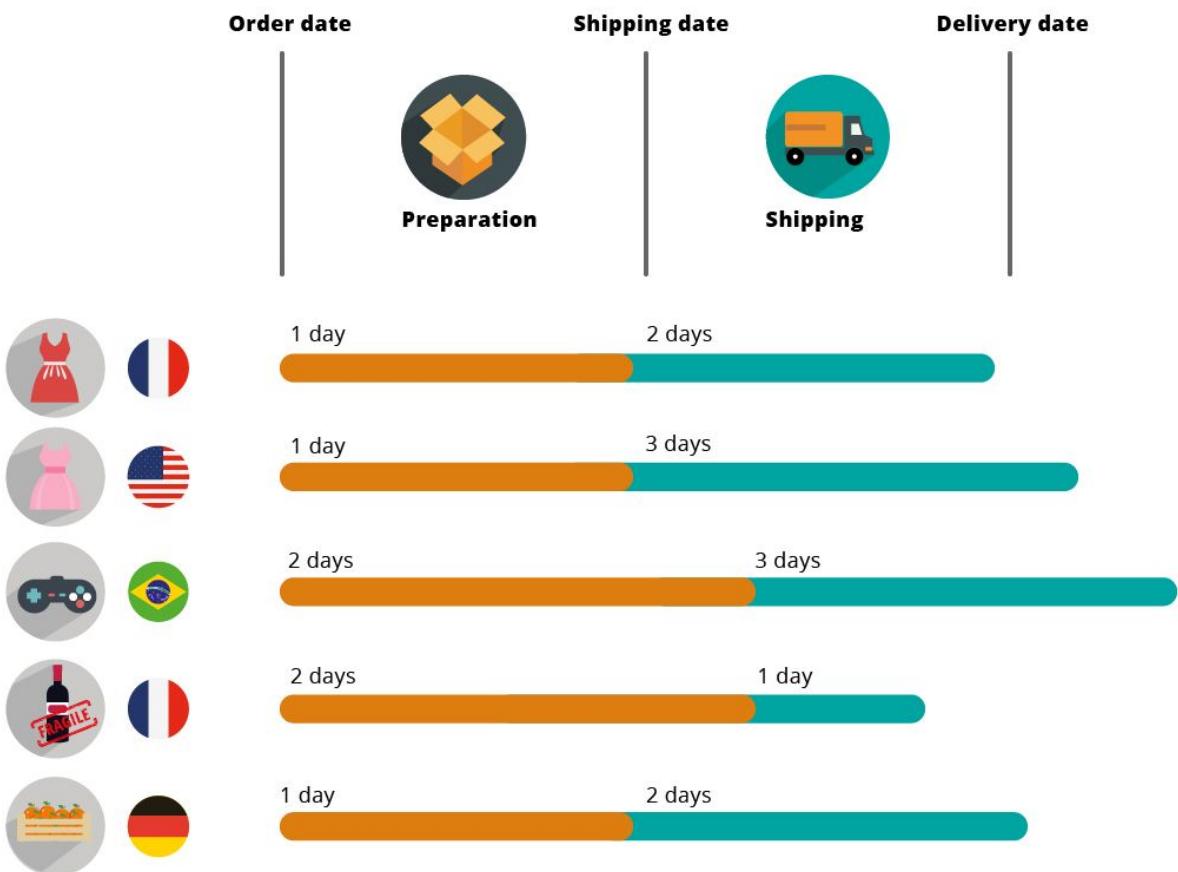
Estimated Delivery Dates can provides 2 information to your users : the **shipping date** based on preparation time or the **delivery date** based on the shipping time.

- Group holidays and days off together to exclude them from the rules.
- Manage the preparation rule depending on conditions and the cut-off time.
- Manage the shipping time rule, depending on conditions and attributes like ZIP code for instance.
- Display the shipping date / delivery date on :
 - the product page
 - in the cart total
 - on the checkout order detail
 - on the checkout success page

- in the order's details of the client's dashboard
- in the order's history of the client's dashboard
- Personalize the message displayed and manage translations according to the selected store view.

How it works?

Determine different **preparation** and **delivery dates** rules based on catalog and/or cart conditions.



1- Define the days-off

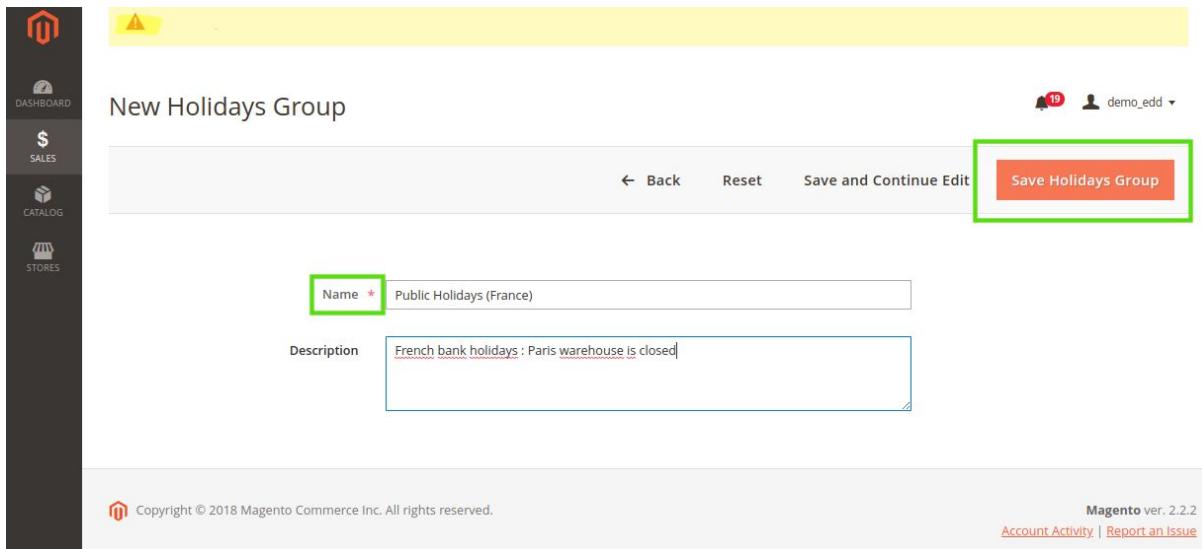
1.1- Create Groups of Days-off

In order to give **relevant preparation** and **delivery dates**, we need to exclude the days-off and public holidays of the rules of preparation and delivery.

As we will need to select the days-off for both rules later, we start with the definition of the days-off by creating groups. It will be easier to select them when needed.

Sales → Estimated Delivery Date → Grouping Holidays

- Add a New Holidays Group
- Give it a name :
 - Public Holidays
 - Annual Closure
 - Warehouse inventory
 - ...
- Save the group.



New Holidays Group

Name * Public Holidays (France)

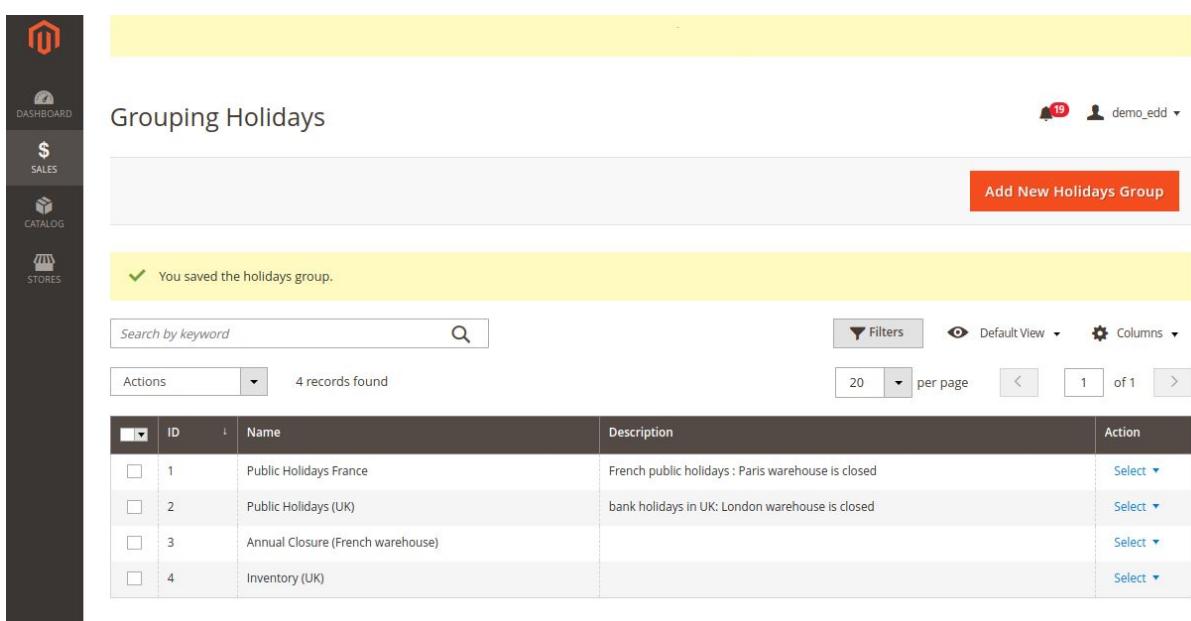
Description French bank holidays : Paris warehouse is closed

Save Holidays Group

This first step is really made to simplify the following time rule configuration. Therefore, here you can organize the group as you want, depending on your situation, for instance if you have warehouses in different countries with different holidays, you can create one group per country.

You can also distinguish public holidays from inventory periods.

Add as many groups as you need or you can also make just one.



You saved the holidays group.

ID	Name	Description	Action
1	Public Holidays France	French public holidays : Paris warehouse is closed	Select ▾
2	Public Holidays (UK)	bank holidays in UK: London warehouse is closed	Select ▾
3	Annual Closure (French warehouse)		Select ▾
4	Inventory (UK)		Select ▾

1.2- Set rules for holidays and days-off

To provide the exact information to your customer, you need to set the different holidays and days-off of your warehouse or logistic team.

Sales → Estimated Delivery Date → Setting Holidays

- Add New Holiday
- Give a name eg: *Christmas*
- select the corresponding day : eg *fixed date : 25 December of every year*
- select the corresponding group it refers to : eg “*Public holidays France*” + “*Public Holidays UK*”
- save

Days-off can be either :

- a fixed date :

Date Type *	Fixed Date	▼				
Fixed Date *	01	▼	January	▼	2018	▼

You can also choose “Every year” according to the occurrence of the event :
The company is closed every year on December 25th.

Fixed Date *	25	▼	December	▲	Every year	▼
--------------	----	---	----------	---	------------	---

You can also select all the days of a certain Month, for annual closure for instance :

Date Type *	Fixed Date	▼				
Fixed Date *	Every days	▼	March	▲	2018	▼

- a flexible date : every 12th of the months, or 3rd Friday of the month

Date Type *	Variable Day	▼							
Variable Date *	First	▼	Sunday	▼	of	January	▼	2018	▲

Following choices are possible :

First, second, third, fourth, last

Days of the week : Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday

Months : January,..., December, Every Months.

Year : 2018..., + Every year.

The screenshot shows the 'New Holiday' configuration page in the Magento 2 admin interface. The left sidebar includes links for Dashboard, Sales, Catalog, and Stores. The main header displays 'New Holiday' and the user 'demo_edd'. The top right features 'Save Holiday' in a red button, along with 'Save and Continue Edit', 'Reset', and 'Back' buttons. The form fields include 'Name *' (Annual Closure), 'Description' (Warehouse (FR)), 'Date Type *' (Fixed Date), 'Fixed Date *' (Every days, August, Every year), and 'Holidays Group *' (a dropdown menu showing 'Public Holidays France', 'Public Holidays (UK)', 'Annual Closure (French warehouse)' which is selected and highlighted in grey, and 'Inventory (UK)').

From the grid :

You saved the holiday.

ID	Name	Description	Rule Date	Date Type	Holidays Group	Action
1	Annual Closure	Warehouse (FR)	Every days August Every year	Fixed Date	Annual Closure (French warehouse)	Select ▾
2	Christmas		25 December Every year	Fixed Date	Public Holidays France Public Holidays (UK)	Select ▾
3	Inventory		Second Friday of February 2018	Variable Day	Inventory (UK)	Select ▾

Copyright © 2018 Magento Commerce Inc. All rights reserved. **Magento** ver. 2.2.2
[Account Activity](#) | [Report an Issue](#)

2- Manage Product Preparation time

Sales → Estimated Delivery Date → Preparation time rules

- Add New Preparation Time Rule
- Add a Name
- Add a Description
- Activate the rule or not
- Select the Website which the rule applies to.
- Select the group(s) of holidays to exclude from this rule

New Preparation Time Rule

Name * Paris Warehouse (FR)

Description

Active * Yes

Websites * EDD
Main Website

Holidays Group * Public Holidays France
Public Holidays (UK)
Annual Closure (French warehouse)
Inventory (UK)

Save Preparation Time Rule

- Select the days when preparation is made : eg :*select Monday to Friday if your warehouse is closed during weekends.*
- Preparation Time : number of **days** needed to prepare a certain type of products.
eg : 1 = preparation = one day, available for shipping the next day.
- *Cut off time* : select the time.

What is the **Cut-off time**?

It is the daily time considered as a limit to prepare the order the same day, after this time your order's preparation will be done the next day.

- Priority : if more than one rule correspond to one product, you have to define a priority to tell which rule will apply : 1 is low priority, 10, 100 and more for higher priorities. You can check the priority in the grid.

The screenshot shows a configuration page for a preparation rule. On the left is a sidebar with icons for DASHBOARD, SALES, CATALOG, and STORES. The main area has the following fields:

- Preparation Day ***: A dropdown menu listing days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday. Sunday is selected.
- Preparation Time ***: An input field containing the number "1". Below it is a note: "In days, e.g.: '1' means ready for shipping the next day".
- Cut Of Time ***: A time picker showing "15 : 00". Below it is a note: "Time at which the order is prepared the next day".
- Priority ***: An input field containing the number "1". Below it is a note: "If more than one rule match, define a priority : 1 for lowest priority, 2,10,100,1000... for higher priority."

Conditions :

Conditions on catalog : use all existing attributes to narrow your condition to the most precise configuration needed.

IMPORTANT :

By default the following attributes are available :

Attribute Set

Category

You can add all the other attributes to your preparation rule.

To add them in the dropdown menu, you need first to :

Stores → Attributes → Product → select your attribute (for instance : color)

In **Storefront Properties** : “use for Promo Rule Condition” select **YES**

Use for Promo Rule Conditions **Yes**

You can also add all the attributes at once using an SQL Request.

Conditions on cart : determine a condition based on the cart of your customer : total weight, total item quantity...

Conditions on catalog



Conditions (don't add conditions if rule applies to all products)

If ALL of these conditions are TRUE :

Activity contains Yoga, Gym



Conditions on cart



Conditions (don't add conditions if rule applies on the whole cart)

If ALL of these conditions are TRUE :

View from the Grid :

The screenshot shows the Magento Admin interface for managing Preparation Time Rules. The left sidebar includes links for Dashboard, Sales, Catalog, and Stores. The main content area has a yellow header bar. Below it, the title "Preparation Time Rule" is displayed, along with user information (19 notifications, demo_edd). A red button labeled "Add New Preparation Time Rule" is visible. The grid table has the following columns: Actions, ID, Name, Description, Preparation Time, Preparation Day, Cut Of Time, Holidays Group, Priority, Status, Websites, and Action. Two records are listed:

Actions	ID	Name	Description	Preparation Time	Preparation Day	Cut Of Time	Holidays Group	Priority	Status	Websites	Action
<input type="checkbox"/>	1	French Warehouse		1	Monday, Tuesday, Wednesday, Thursday, Friday	15:00	Public Holidays France Annual Closure (French warehouse)	5	Active	EDD	Select ▾
<input type="checkbox"/>	2	British Warehouse		2	Tuesday, Wednesday, Thursday, Friday, Saturday	13:30	Public Holidays (UK) Inventory (UK)	4	Active	EDD	Select ▾

3- Manage Shipping time and delivery dates

The screenshot shows the 'New Shipping Time Rule' configuration page. On the left is a vertical sidebar with icons for Dashboard, Sales, Catalog, and Stores. The main area has a header with 'New Shipping Time Rule', a back button, a reset button, and a 'Save and Continue Edit' button. A prominent red 'Save Shipping Time Rule' button is at the top right. The form fields include:

- Name ***: UK Delivery
- Description**: (empty text area)
- Active ***: Yes (radio button)
- Websites ***: EDD Main Website (dropdown menu)
- Holidays Group ***: Public French Holidays, Public Holidays (UK), Annual Closure (French Warehouse), Inventory (UK) (dropdown menu)
- Shipping Day ***: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday (dropdown menu)
- Shipping Time ***: 3 (text input field)
In days, e.g.: '1' means ready for delivery the next day

4- Message personalization and translations

First, go to :

Stores → Configuration → Blackbird Extensions → Estimated Delivery Date

Translation management

Here you can manage translations by selecting the corresponding **store view**.

Use Default Config to set the general configuration if it applies to more than one store view.

Message customization

- Select your Shipping preferences :

- **How to Display Estimated Date :**
 - Display only the last Date : when the order is grouped in one shipment.
 - Display Date per Product : if the items are shipped separately.
- **Choose a date format** : short, medium, large
- **Display if No Dates are Estimable :**
 - no : nothing will appear in the front
 - Yes : default message : No Computable Estimated Shipping / Delivery Date. You can change this message in the following section.

Shipping Preferences Configuration



i Here you can choose how to display the estimated dates. You have 2 choices according to shipping preferences:
Display Date per Product: displays one date for each product of the order. (that supposed that items can be sent separately if they are not available at the same time)
Display Only the Last Date: displays one expected delivery date per order, corresponding to the last product available. The same date appears in the cart and on each product page.

How to Display Estimated Date [store view]	Display Date per Product
Choose a date format [store view]	Medium (ex: 26 jan 2018)
Display If No Date are Estimable [store view]	No

If Yes, the message defined in Text configuration/ If No Date are Calculable

Change the message in “Text configuration”. In your message, the variable ‘%1’ stands for the date.

Text configuration



- i** You can personalize the message displayed along with the estimated date. Use '%1' to display the date in your message.

For Product Shipping Date [store view]

Estimated Shipping Date for this Product : %1

Default message: Estimated Shipping Date for this Product : %1

For Product Delivery Date [store view]

Estimated Delivery Date for this Product : %1

Default message: Estimated Delivery Date for this Product : %1

If No Date are Calculable [store view]

No Computable Estimated Shipping/Delivery Date.

Default message: No Computable Estimated Shipping/Delivery Date.

Here you can activate or deactivate the message in the different locations.

Display location configuration



- i** Here you can choose where the estimated date will appear.

On Product Page [store view]

Yes

Under Each Cart Items [store view]

Yes

In Order Product Details in Client Dashboard [store view]

Yes

Under Each Product in Email [store view]

Yes

Under Each Product in Checkout [store view]

Yes

Important :

If there is only a preparation time matching and no delivery rule, the message displayed will be : *Estimated Shipping Date for this product*. Indicating the date when the product will be available for shipping.

If there are both preparation & shipping rule matching, the extension will only indicate the date of **delivery**.

Shopping Cart

Item	Price	Qty	Subtotal
 Voyage Yoga Bag	€32.00	1	€32.00

Estimated Delivery Date for this Product : May 7, 2018

[Edit](#) [Delete](#)

[Update Shopping Cart](#)

[Apply Discount Code](#)

Summary

[Estimate Shipping and Tax](#)

Subtotal €32.00
Tax €0.00

Order Total €32.00

[Proceed to Checkout](#)[Check Out with Multiple Addresses](#)

Summary

Estimate Shipping and Tax

COUNTRY

[United States](#)

STATE/PROVINCE

[Please select a region, state or provi](#)

ZIP/POSTAL CODE

Flat Rate

 FIXED €5.00

Best Way

 TABLE RATE €15.00

Subtotal €32.00

Tax €0.00

Order Total **€32.00**

Estimated Delivery Date : 2/17/18

[Proceed to Checkout](#)[Check Out with Multiple Addresses](#)

If you need further assistance, please write us at help@bird.eu