

E-Commerce plugin for ordering photographs (digital objects) in AtoM

Background

The Mennonite Archival Image Database (MAID: <https://archives.mhsc.ca/>) launched in 2015 as an AtoM multi-repository database for photographs in Mennonite archives. We included an e-commerce plugin developed specifically for MAID by Peaceworks Technology Solutions. MAID would like to see the plugin incorporated into future versions of AtoM. We are reaching out to the AtoM community to find other users who are interested in helping to make it financially possible for Artefactual to complete this work.

Overview

- This plugin allows customers to select and purchase individual photos
- Photos for purchase are placed in a cart
- Customers can order from multiple archives in one order
- Customers do not need to create an account in the database to place an order
- Payment for the photos happens via PayPal
- When payment is complete, the designated Editor at each archives involved in the transaction receives an email notifying them an order has been placed and can be viewed on their “orders” page
- The Editor then approves the order. The editor has the option to reject the entire order or reject (remove) individual photos from the order if necessary.
- When the order is approved, the customer is sent an email containing a link which they can use to download the images. The Editor can choose to include personalized comments in the email.
- The link remains active for 10 days
- Editors have access to a sales report that retains information of transactions
- Individual customers can request that their personal information be removed from the sales report

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Details

1. E-Commerce and Editors

Each archives with photos for sale should have one Editor with access to e-commerce functions. Editors have the ability to view and process orders for the institution. An Editor can be associated with only one institution. Editor accounts are created by the site Administrator.

2. Shopping cart

When viewing archival descriptions (records), a customer usually has the option to add the photo to their shopping cart (“Purchase copy”). Photos from more than one institution may be added to the cart. In the following circumstances, the system will *not* provide the “Purchase copy” button:

- the archival description record does not have a digital object (photo) attached to it
- the record has the Disseminate Right set to “Disallow”, so the system will instead display the message “This photo has restrictions and may not be ordered online. Please contact the archives for permission to order the photo.”¹
- the archival description record is not related to an institution, or the institution does not have any pricing configuration.

After an item is added to the cart, the customer can click the “Cart” button to see the cart contents and subtotal. From here they have the option to Edit the cart or Check out. Edit Cart shows the price of each item in the cart and allows individual items to be removed.

3. Check out

When a user proceeds to Check out, they must fill in their name, address and email address. They may optionally enter their phone number. They must accept the terms (non-commercial usage only) by checking a box.² If they do not accept the terms, they are not allowed to submit the order.

Optionally, customers may check a box to indicate that they would like to receive email updates from MAID. This information is sent to the MAID site administrator. The system does not require the customer to create an account. Returning customers use the same check out process each time.

4. Payment

Payment is made via PayPal. There is a single PayPal account shared by all institutions.³ PayPal allows the customer to pay either by credit card or by using their PayPal account. When the payment transaction is completed, the customer has the option to return to the MAID site. The

¹ Note that in AtoM, rights are inherited from the parent record. For example setting “Disseminate” to “Disallow” at the Collection level will prevent any photo within the Collection from being added to the cart – unless an individual photo record within the Collection has Disseminate set to Allow (i.e. at the Item level).

² The customer is provided with the following link to view the details of the terms: <https://archives.mhsc.ca/order>

³ MAID decided to handle the reconciliation of accounts outside of the e-commerce plugin. At the end of MAID’s fiscal year, each partner’s annual site maintenance fees are due. The treasurer subtracts the cost recovery fees in the PayPal account from each archive’s amount owing. If an archives were to take in more than the maintenance fee owed, the treasurer would issue a cheque.

MAID site receives notification directly from PayPal to indicate whether that payment was successful. At this point:

- The customer is notified via email that their payment has been received and that the order will be processed.
- Each institution involved in the transaction is sent an email notification, including a link to their Orders page so that they may process it.

If a customer cancels their order, the order record remains in the database with status 'cancelled'. If payment is not successful, the order record remains in the database but has status 'pending_payment'. Such orders are not visible on the Manage > Orders page.

5. Viewing and Processing Orders

- An order may involve one or more archives, depending on which photos the customer selected
- Editors from each archives can view and process their own orders by logging in to MAID, then clicking the “Manage” menu (pencil icon), then “Orders”. By default, orders with “paid” status are the ones shown in this report, since these are the ones needing to be processed. An Editor is linked to one institution, and the Manage Orders shows only orders where their institution is involved.
- Administrators can change a status filter to “all”, “refunded”, “cancelled” or “processed” to change which records are displayed.
- Editors can click an order to view its details. This shows the customer name, address and email and a list of photos. The order may include photos from other institutions, but these are not shown.
- For each photo, the admin may choose to “accept” the photo (allow it to be purchased) or “reject” (remove it from the order and refund the customer for this photo).⁴
- The Editor may also include a note which will be included in the email notification sent to the customer.
- If any photos are rejected, the refund happens automatically as soon as the “Process order” button is clicked. An order will have the status “refunded” if ALL of the photos in the order were rejected (from all institutions). Otherwise it will show as “processed.”

6. Download

- As soon as an individual archives processes their portion of the order, the customer will be sent an email with a link for downloading the images. The download page will include all photos from their order that have been approved so far, possibly including photos from multiple institutions. The customer may download all photos (as a zip file), or may download photo files individually.

⁴ An example of why an Editor might reject an order or portions of an order would be if the photograph(s) ordered were mistakenly set to “disseminate > allow” when there is a restriction on the archives reproducing the photograph(s)

- Customers are allowed to access these download links for 10 days after the last institution processes their portion of the order. After that, the download link will expire.

7. Vacation

- In the event that an Editor will be unavailable to process orders, they may set a vacation message which will be sent to customers (after they place an order)
- To enable the vacation message, log in and then click your username at the upper right, then choose “profile.” Then click the “Ecommerce Settings” tab. Click “Edit.” Enable the “Vacation enabled” checkbox and enter the vacation message. Then click “Save.” The vacation message will be sent to any customer who places an order from this institution.
- If instead, an Editor wishes to transfer their e-commerce duties to another person within their archives during their absence, they may arrange this.

8. Removing personal information

- If a customer requests that their personal information be removed from MAID, then this may be done by Editors who have access to that customer’s order(s).
- Since a customer may have placed multiple orders from different institutions, Editors from each institution should check for and remove personal information.
- Click the “Manage” menu (pencil icon), then “Orders.” Search for the customer by name. There may be multiple orders from that customer. For each order, click it to view, then choose “Remove personal information” at the bottom and click “OK” to confirm. The order record will remain in the system, but the name will be set to “anonymous” and the address, email and phone number fields will be blanked out.
- Note that this option is not available for unprocessed orders (those with status “paid”). First all involved institutions must process the order, then the system will allow you to remove personal information.

9. Sales Report

- An Editor can use the Sales Report to see total orders and income for a date range. The report includes only orders (or portions of orders) related to their institution.
- Click the “Manage” menu (pencil icon), then “Sales Report”. Optionally enter start and end dates. The summary information at the top of the report shows total orders, total photos sold, taxes (if applicable), fees (deducted by PayPal) and net sales. The itemized list shows the records (transaction events) and includes: sales, sale fees (deducted by PayPal), taxes (if applicable), refunds, fees refunded, taxes refund
- It is possible to copy and paste this table into a spreadsheet for printing or further processing.

10. Pricing (cost-recovery fees)

Each archives may set their own per-photo price. Pricing cannot be set via the MAID user interface, but is done by editing a configuration file on the server.

11. Per-institution watermark

AtoM includes the ability to apply a watermark to uploaded photos. However there is only provision for a single global watermark which is applied to all images of one partner archives. This customization allows each archives to have their own watermark.

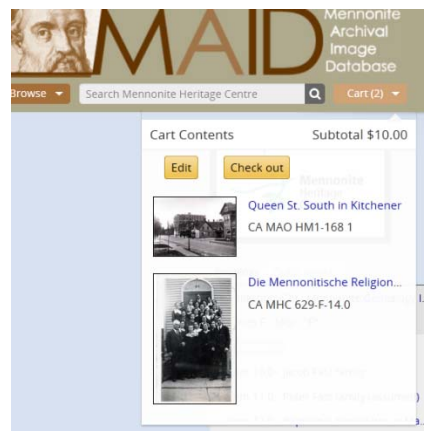
Enhancement wish-list

- Currently, while each institution can set their own cost recovery fee, the fee must be the same for all photos (digital objects) ordered from that institution. Could we change that to allow each institution to set multiple cost recovery fees?
- Languages in the e-commerce ordering process. We have translated our static pages into German, and eventually would like to add French and Spanish as well. We would be willing to provide German, French and Spanish translations for the e-commerce order form and automated messages, so that customers can order in these (or any other) translated languages.

Screenshots



Purchase Copy Button



Cart with photos added (photos are from different archives). Customer can continue searching for more photos, edit their order, or proceed to checkout.

-628 - Photograph of the cover of Newsweek

Photograph of the cover of Newsweek



This photo has restrictions and may not be ordered online. Please contact the archives for permission to order the photo.

Reports

Import

XML

CSV

Export

Dublin Core 1.1 XML

EAD 2002 XML

Related subjects

Onassis, Jacqueline

Kennedy 1929-1994

Photograph with permissions set to Disseminate > Disallow and Display > Allow with “restrictions” message

Check out

Checkout Information

First name *

Last name *

Country

Canada

Address1 *

Address2

City *

Province/Region *

Select...

Postal code *

Email *

Confirm Email *

Phone

I agree to use this copy only for non-commercial purposes as outlined here. I am aware that any other use may require permission from the copyright owner, and that it is my responsibility to obtain this permission.




If I want to use this copy for any other use, I will contact the archives that supplied the photograph for more information.

Yes, I accept these terms

I would like to receive email updates about MAID news and events

Once your order is approved by the supplying archive(s), you will be sent an email with a link to download your photos. Please allow 2-3 business days for a response from the supplying archive(s).

Payment will take place via PayPal. You do **not** have to have a PayPal account -- simply choose "Don't have a PayPal account".

Cancel Submit order

Order form. “Submit order” takes the customer to PayPal

Sales Report from 2015-02-01 to 2015-02-27

Start date: 2015-02-01 End date: 2015-02-27 Update

Total orders	2
Photos sold	0
Gross sales	\$10.00
Items sales	\$10.00
Fees	(\$0.90)
Net Sales	\$9.10

ID	Sale ID	Description	Amount	Customer	Created
138	496980	sale	5.00	Laureen Harder-Gissing	February 27, 2015 1:10 PM
139	496980	sale fees	-0.45	Laureen Harder-Gissing	February 27, 2015 1:10 PM

Sales Report shows processed sales to Editor/site Administrator

Ecommerce settings

User name	MAID-A Laureen Harder-Gissing
Repository	Mennonite Archives of Ontario
Vacation Enabled	No
Vacation Message	<input type="text"/>

[Edit](#)

Edit to enable vacation message