

Checkout Messages

Overview

Checkout messages are displayed to the user when they are finalising their order. For instance, they can be used to communicate:

- applicable rules and regulations when purchasing certain products, e.g., hazardous substance warnings;
- changes to orders over holiday periods;
- expected shipping delays on certain products.

NOTE - There is an option to add a confirmation message and checkbox in the checkout message. If this is enabled, the user must acknowledge they have read the message to continue with Checkout. The confirmation text can be edited in the [Checkout Messages Widget](#).

Checkout messages can be shown to all users at the checkout stage but a message can be configured so that it is shown only when certain criteria are met. For example, you can set messages for:

- orders with products from a specific category;
- specific customers;
- orders containing specific products;
- orders over/under/between certain dollar values.

NOTE - If two or more set messages are applicable to an order, both messages will appear in the checkout message box.

On this page:

- [Overview](#)
- [Step-by-step guide](#)
 - [1. Create a Checkout Message](#)
 - [Defining the criteria for displaying checkout messages](#)
 - You might find these scenarios helpful when creating your own Checkout Messages. When a Product in a specific Category is in the Cart:
 - When a Product under a higher level Category is in the Cart:
 - For a specific Customer:
 - When a specific Product is in the Cart:
 - When one (or more) of several Product is in the Cart:
 - When the Cart Amount is greater than \$200.00 Ex Tax:
 - [2. Enable Checkout Message](#)
- [Additional Information](#)
- [Related help](#)

Step-by-step guide

1. Create a Checkout Message

1. In the CMS, go to **Settings** *Checkout Messages*.
2. Click **New**.
3. In **Message**, enter the message to be displayed to the user.
4. Use **Sort Code/Mask** to define a product category:
 - a. enter the sort code for one category of products,
 - b. enter '%' for ALL products in all categories,
 - c. wildcards for multiple categories, i.e., 'SX123%', or
 - d. leave blank if using an 'Override Query'.
5. For **Is Plain Text?**:
 - a. **Tick** for the message to be displayed in plain text with no applied formatting. An example is the default message:

Important Information

☐ I confirm I have read this message

Here's a sample checkout message.
It can be restricted to a user group, product group, or other such condition.

✕ Return To Cart

✓ Proceed To Checkout

- b. **Untick** for the message formatting to be rendered by any HTML. Some HTML element properties will be guided by your site style (accessible in the CMS: **Style Guides** **Static Content**.) Formatting allows content to visually stand out more and be customised to suit purpose.

Adding HTML formatting

Imagine how you want the message to look. You may want some parts to stand out more than others. Or for a certain sentence to appear bigger than others. Or you want to add some white space between certain sections of the message.

Adding HTML tags

An HTML tag is a special word or letters surrounded by angle brackets, < and >. To format a chunk of text, in most cases, you will be placing it between opening and closing tags. The tags with the included text is called an HTML element. For example, if we add a word 'IMPORTANT' to the default checkout message and want to bold it, we can make it a bold element by putting it in between the bold opening tag and closing tag . A closing tag has a forward slash '/' before the special word/letter and the closing angle bracket. The whole bold element will look like this: IMPORTANT.

Here's a sample checkout message.

IMPORTANT: The message can be restricted to a user group, product group, or other such condition.

→

Here's a sample checkout message. **IMPORTANT** The message can be restricted to a user group, product group, or other such condition.

A few elements don't need opening and closing tags. The most useful is
, which puts a line break where it appears. Suppose we want to add a line break after 'Here's a sample message.'

Here's a sample checkout message.

IMPORTANT: The message can be restricted to a user group, product group, or other such condition.

→

Here's a sample checkout message.

IMPORTANT: The message can be restricted to a user group, product group, or other such condition.

Nesting elements

You can keep one HTML element inside another HTML element.

<p>Here's a sample checkout message. </p>

<p>IMPORTANT: The message can be restricted to a user group, product group, or other such condition.</p>

→

Here's a sample checkout message.

IMPORTANT: The message can be restricted to a user group, product group, or other such condition.

List of useful HTML elements

There are many more HTML elements you can use but here are some basic ones. Play around with formatting options to achieve the look you want.

Function	HTML tag	Example
Headings	<code><h1></h1></code> <code><h2></h2></code> <code><h3></h3></code> Note - The further down you go with the headings, the smaller they become. The lowest is <code><h6></code>. However, your site's style may not have all heading elements defined.	
Paragraph	<code><p></p></code> Creates paragraph elements in your message. Provides white space between elements for easier reading.	
Line break	<code>
</code> Adds a line break to	

Lists	List type: <code></code> - Unordered list (no special order or sequence for items in list. Default: listed items to start with a bullet point. <code></code> - Ordered list. Default: listed items are numbered. Note - Define the List type, then each list item is contained within <code></code> tags. Example: <pre> List item 1 List item 2 </pre>	<pre><p>Pickup instructions: Wait to receive confirmation email. Bring this email with you to the store. </p></pre> Pickup instructions: 1. Wait to receive confi 2. Bring this email with
Typeface for emphasis	<code>bold</code> or <code></code> <code><i>italics</i></code> or <code></code> <code><u>underline</u></code>	<pre>bold or strong
 <i>italics</i> or emphasis
 <u>underline</u></pre> bold or strong italics or emphasis underline

6. For **Requires User Confirmation**:
 - a. **Tick** to display a checkbox that the user must tick before being allowed to continue
 - b. **Untick** for the message to display without confirmation from the user
7. Enter an '**Override Query**' if required. **NOTE** - This field works together with **Sort Code/Mask**. See [Defining the criteria for checkout messages](#) below.



An override query is used to define alternative criteria to be met before the message is displayed to the user.

The following tables can be used:

ProntoSalesOrder
ProntoSalesOrderLine
Customer
Product

An example would be:

```
product.conditioncode = 'T'
```

See more examples below.

8. For **Applies to Mode**, set whether the message applies to B2B, B2C or both user roles.
9. (For classic sites only. Leave blank for BPD sites.) For the **Top Template** (displayed below the message), select the required template, if applicable.
10. (For Pronto only.) For **Field Group Name**, select the *fieldgroup* that is defined on the *prontosalesorder* table to be displayed along with the message.
11. (For classic sites only. Leave blank for BPD sites.) For the **Bottom Template** (displayed below the message), select the required template, if applicable.
12. To save these changes, click **OK**.

Defining the criteria for displaying checkout messages



When setting up a checkout message, the '**Sort Code/Mask**' and '**Override Query**' fields are used to define the criteria for whether or not a checkout message is displayed to the user. The following values will provide an example of how to display a checkout message for various scenarios.



Checkout Message Examples

You might find these scenarios helpful when creating your own Checkout Messages.

When a Product in a specific Category is in the Cart:

- **'Sort Code/Mask':** Enter the Category code. i.e. SX123456
- **'Override Query':** Leave blank.

When a Product under a higher level Category is in the Cart:

- **'Sort Code/Mask':** Enter the Parent Category code and add a percentage sign to indicate any categories under that tree. i.e. SX12%
- **'Override Query':** Leave blank.

For a specific Customer:

- **'Sort Code/Mask':** Leave blank.
- **'Override Query':** Enter the following query and substitute **ABC123** for the customer code.

```
Code = 'ABC123'
```

When a specific Product is in the Cart:

- **'Sort Code/Mask':** Leave blank.
- **'Override Query':** Enter the following query and substitute **AB-12345** for the product code.

```
productcode = 'AB-12345'
```

When one (or more) of several Product is in the Cart:

- **'Sort Code/Mask':** Leave blank.
- **'Override Query':** Enter the following query and substitute **'CV120','CV200','CV250'** with your own product codes (comma-separated)

```
productcode in ('CV120','CV200','CV250')
```

When the Cart Amount is greater than \$200.00 Ex Tax:

- **'Sort Code/Mask':** Leave blank.
- **'Override Query':** Enter the following query.

```
(soOrderTotalAmount-SoOrderTotalTax) > 200
```

2. Enable Checkout Message

Displaying the Checkout Message is enabled by adding the [Checkout Messages widget](#) in the relevant template, e.g., Cart. Further display options are also available in the widget. See the [help page](#) for the Checkout Messages widget.

Additional Information

Minimum Version Requirements

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Prerequisites	--
Self Configurable	Yes
Business Function	Site Structure
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related help

- [Style Sheet Editor](#)
- [Checkout Messages Widget](#)