
django-SHOP

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The **django-SHOP** framework is, as its name implies, a framework and not a software which runs out of the box. Instead, an e-commerce site built upon **django-SHOP**, always consists of this framework, a bunch of other Django apps and the **merchant's own implementation**. While this may seem more complicate than a ready-to-use solution, it gives the programmer enormous advantages during the implementation:

Not everything can be “explained” to a software system using graphical user interfaces. After reaching a certain point of complexity, it normally is easier to pour those requirements into executable code, rather than to expect yet another set of configuration buttons.

When evaluating **django-SHOP** with other e-commerce solutions, I therefore suggest to do the following litmus test:

Consider a product which shall be sold world-wide. Depending on the country's origin of the request, use the native language and the local currency. Due to export restrictions, some products can not be sold everywhere. Moreover, in some countries the value added tax is part of the product's price, and must be stated separately on the invoice, while in other countries, products are advertised using net prices, and tax is added later on the invoice.

Instead of looking for software which can handle such a complex requirement, rethink about writing your own plugins, able to handle this. With the **django**, **REST** and **django-SHOP** frameworks, this normally is possible in a few dozen lines of clearly legible Python code. Compare this to solutions, which claim to handle such complex requirements. They normally are shipped containing huge amounts of features, which very few merchants ever require, but which bloat the overall system complexity, making such a piece of software expensive to maintain.

1.1 Design Decisions

1.1.1 Single Source of Truth

A fundamental aspect of good software design is to follow the principle of “Don't repeat yourself”, often denoted as DRY. In **django-SHOP** we aim for a *single source of truth*, wherever possible.

For instance have a look at the `shop.models.address.BaseShippingAddress`. Whenever we add, change or remove a field, the ORM mapper of Django gets notified and with `./manage.py makemigrations` followed by `./manage.py migrate` our database scheme is updated. But even the input fields of our address form adopt

to all changes in our address model. Even the client side form field validation adopts to every change in our address model. As we can see, here our single source of truth is the address model.

1.1.2 Feature Completeness

A merchant who wants to implement a unique feature for his e-commerce site, *must* never have to touch the code of the framework. Aiming for ubiquity means, that no matter how challenging a feature is, it *must be possible to be implemented* into the merchant's own implementation, rather than by patching the framework itself.

Otherwise *this framework contains a bug* - not just a missing feature! I'm sure some merchants will come up with really weird ideas, I never have thought of. If the **django-SHOP** framework inhibits to add a feature, then feel free to create a bug report. The claim "*feature completeness*" for a framework is the analogue to the term "*Turing completeness*" for programming languages.

Consider that on many sites, a merchant's requirement is patched into existing code. This means that every time a new version of the e-commerce software is released, that patch must be repeatedly adopted. This can become rather dangerous when security flaws in that software must be closed immediately. **DjangoSHOP** instead is designed, so that the merchant's implementation and third party plugins have to subclass its models and to override its templates accordingly.

1.1.3 Minimalism

In a nutshell, **django-SHOP** offers this set of basic functionalities, to keep the framework simple and stupid (KISS) without reinventing the wheel:

- A catalog to display product lists and detail views.
- Some methods to add products to the cart.
- A way to remove items from the cart or change their quantities.
- A set of classes to modify the cart's totals.
- A collection of forms, where customers can add personal, shipping and payment information.
- A way to perform the purchase: this converts the cart into an order.
- A list view where customers can lookup their previously performed orders
- A backend tool which helps to track the state of orders.

All functionality required to build a real e-commerce site, sits on top of this. Computing taxes for instance, can vary a lot among different legislations and thus is not part of the framework. The same applies for vouchers, rebates, delivery costs, etc.

These are the parts, which must be fine tuned by the merchant. They can be rather complicate to implement and are best implemented by separate plugins.

1.1.4 Separation of Concern

Compared to other e-commerce solutions, the **django-SHOP** framework has a rather small footprint in terms of code lines, database tables and classes. This does not mean, that its functionality is somehow limited. Instead, the merchant's own implementation can become rather large. This is because **django-SHOP** implies dependencies to many third party Django apps.

Having layered systems gives us programmers many advantages:

- We don't have to reinvent the wheel for every required feature.

- Since those dependencies are used in other applications, they normally are tested quite well.
- No danger to create circular dependencies, as found often in big libraries and stand alone applications.
- Better overview for newcomers, which part of the system is responsible for what.
- Easier to replace one component against another one.

Fortunately Django gives us all the tools to stitch those dependencies together. If for instance we would use one of the many PHP-based e-commerce system, we'd have to stay inside their modest collection for third party apps, or reinvent the wheel. This often is a limiting factor compared to the huge ecosystems around Django.

1.1.5 Inversion of Control

Wherever possible, **django-SHOP** tries to delegate the responsibility for taking decision to the merchant's implementation of the site. Let explain this by a small example: When the customer adds a product to the cart, **django-SHOP** consults the implementation of the product to determine whether the given item is already part of the cart or not. This allows the merchant's implementation to fine tune its product variants.

1.2 Core System

Generally, the shop system can be seen in three different phases:

1.2.1 The shopping phase

From a customers perspective, this is where we look around at different products, presumably in different categories. We denote this as the catalog list- and catalog detail views. Here we browse, search and filter for products. In one of the list views, we edit the quantity of the products to be added to our shopping cart.

Each time a product is added, the cart is updated which in turn run the so named "Cart Modifiers". Cart modifiers sum up the line totals, add taxes, rebates and shipping costs to compute the final total. The Cart Modifiers are also during the checkout phase (see below), since the chosen shipping method and destination, as well as the payment method may modify the final total.

1.2.2 The checkout process

Here the customer must be able to refine the cart' content: Change the quantity of an item, or remove that item completely from the cart.

During the checkout process, the customer must enter his addresses and payment informations. These settings may also influence the cart's total.

The final step during checkout is the purchase operation. This is where the cart's content is converted into an order object and emptied afterwards.

1.2.3 The fulfillment phase

It is now the merchants's turn to take further steps. Depending on the order status, certain actions must be performed immediately or the order must be kept in the current state until some external events happen. This could be a payment receivment, or that an ordered item arrived in stock. While setting up a **django-SHOP** project, the allowed status transitions for the fulfillment phase can be plugged together, giving the merchant the possibility to programmatically define his order workflows.

1.3 Plugins

Django SHOP defines 5 types of different plugins:

1. Product models
2. Cart modifiers
3. Payment backends
4. Shipping backends
5. Order workflow modules

They may be added as a third party **django-SHOP** plugin, or integrated into the merchant's implementation.

Unique Features of django-SHOP

2.1 django-SHOP requires to describe your products instead of prescribing prefabricated models

Products can vary wildly, and modeling them is not always trivial. Some products are salable in pieces, while others are continues. Trying to define a set of product models, capable for describing all such scenarios is impossible – describe your product by customizing the model and not vice versa.

2.1.1 E-commerce solutions, claiming to be plug-and-play, normally use one of these (anti-)patterns

Either, they offer a field for every possible variation, or they use the Entity-Attribute-Value pattern to add meta-data for each of your models. This at a first glance seems to be easy. But both approaches are unwieldy and have serious drawbacks. They both apply a different “physical schema” – the way data is stored, rather than a “logical schema” – the way users and applications require that data. As soon as you have to combine your e-commerce solution with some Enterprise-Resource-Planning software, additional back-and-forward conversion routines have to be added.

2.1.2 In django-SHOP, the physical representation of a product corresponds to its logical

django-SHOP’s approach to this problem is to have minimal set of models. These abstract models are stubs provided to subclass the physical models. Hence the logical representation of the product conforms to their physical one. Moreover, it is even possible to represent various types of products by subclassing polymorphically from an abstract base model. Thanks to the Django framework, modeling the logical representation for a set of products, together with an administration backend, becomes almost effortless.

2.2 Django-SHOP is multilingual

Products offered in various regions, normally require attributes in different natural languages. For such a set of products, these attributes can be easily modelled using translatable fields. This lets you seamlessly built a multilingual e-commerce site.

2.3 Django-SHOP supports multiple currencies

Django-SHOP is shipped with a set of currency types, bringing their own money arithmetic. This adds an additional layer of security, because one can not accidentally sum up different currencies. These money types always know how to represent themselves in different local environments, prefixing their amount with the correct currency symbol. They also offer the special amount “no price” (represented by –), which behaves like zero but is handy for gratuitous items.

2.4 Django-SHOP directly plugs into django-CMS

Product detail pages may use all templatetags from **django-CMS**, such as the `{% placeholder ... %}`, the `{% static_placeholder ... %}`, or other CMS tags.

Django-SHOP does not presuppose categories to organize product list views. Instead django-CMS pages can be specialized to handle product lists via a CMS app. This allows the merchant to organize products into categories, using the existing page hierarchy from the CMS. It also allows to offer single products from a CMS page, without requiring any category.

2.5 Django-SHOP is based on REST

- Django-SHOP uses the Django REST framework and hence does not require any Django View
- Every view is based on REST interfaces.
- Infinite scrolling and paginated listings use the same template.
- Views for cart, checkout etc. can be inserted into exiting pages.
- This means that one can navigate through products, add them to the cart, modify the cart, register himself as new customer (or proceed as guest), add his shipping information, pay via Stripe and view his past orders. Other Payment Service Providers can be added in a pluggable manner.

Every page in the shop: product-list, product-detail, cart, checkout-page, orders-list, order-detail etc. is part of the CMS and can be edited through the plugin editor. The communication between the client and these pages is done exclusively through REST. This has the nice side-effect, that the merchants shop implementation does not require any Django-View.

Django-SHOP is shipped with individual components for each task. These plugins then can be placed into any CMS placeholder using the plugin editor. Each of these plugins is shipped with their own overridable template, which can also be used as a stand-alone template outside of a CMS placeholder. Templates for bigger tasks, such as the Cart-View are granular, so that the HTML can be overridden partially.

Authentication is done through auth-rest, which allows to authenticate against a bunch of social networks, such as Google+, Facebook, GitHub, etc in a pluggable manner.

Moreover, the checkout process is based on a configurable finite state machine, which means that a merchant can adopt the shops workflow to the way he is used to work offline.

Client code is built using Bootstrap-3.3 and AngularJS-1.3. jQuery is required only for the backends administration interface. All browser components have been implemented as AngularJS directives, so that they can be reused between projects. For instance, my current merchant implementation does not have a single line of customized JavaScript.

This makes it very easy, even for non-programmers, to implement a shop. A merchant only has to adopt his product models, optionally the cart and order models, and override the templates.

This tutorial shows how to setup a working e-commerce site with **django-SHOP** using the given dependencies. The code required to setup this demo can be found in the `example/myshop` folder.

3.1 Django-SHOP Tutorial

This tutorial is aimed at people new to django-SHOP but already familiar with Django. If you aren't yet, reading their excellent [Django Tutorial](#) is highly recommended.

Since **django-SHOP** relies on many features offered by [django-CMS](#) and [Django REST Framework](#), you should familiarize yourself with these apps.

3.1.1 Introduction

Django-SHOP is an e-commerce framework rather than a turn-key solution. This means that the merchant is in charge of the project and that **django-SHOP** acts as one of the third party dependencies making up the whole project. We name this the *merchant implementation*.

The merchant implementation contains everything which makes up its fully customizable project, such as:

- The main configuration file, `settings.py`.
- The URL-routing entry point, usually `urls.py`.
- Optionally, but highly recommended: Django models to describe the products sold by the merchant.
- If required, extended models for the Cart and Order.
- An administration interface to manage entities from all those models.
- Special Cart modifiers to calculate discounts or additional costs.
- Order workflows to handle all the steps how an order is processed.
- Apphooks for integrating Django-Views into **django-CMS**.

- Custom filters to restrict the rendered set of products according to their properties.
- Form definitions, if they differ from the built-in defaults.
- HTML snippets and their cascading style sheets, if they differ from the built-in defaults.

This approach allows a merchant to implement every desired extra feature, without having to modify any code in the **django-SHOP** framework itself. This however requires to add some custom code to the merchant implementation itself. Since we don't want to do this from scratch, we can use a prepared [cookiecutter template](#) to bootstrap our first project. Please follow their instructions for setting up a running demo.

This cookiecutter template is shipped with 3 distinct product models, which are named *commodity*, *smartcard* and *polymorphic*. Depending on their need for internationalization, they are subdivided into a variant for a single language and one with support for translated product properties. Which one of them to use, depends on the merchant requirements. When answering the questions, asked by the cookiecutter wizard, consider to:

- use *commodity*, if you want to fill a free-form page with components from the CMS. It does not require any adaption of the product model. It is useful for shops with a handful of different products. [The Commodity Product Model](#) and [The Internationalized Commodity Product Model](#)
- use *smartcard*, if you have many products, which all share the same properties. It is useful for shops with one distinct product type. Here the product model usually must be renamed, and further adopted, by adding and removing fields. [The Smart Card Product Model](#) and [An Internationalized Smart Card Model](#)
- use *polymorphic*, if you have many product types, with different properties for each type. Here we have to define a smallest common denominator for all products, and further create a product model for each distinct product type. [The Polymorphic Product Model](#) and [The Internationalized Polymorphic Product Model](#)

3.1.2 Installation

Before installing the files from the project, ensure that your operating system contains these applications:

- [NodeJS](#) including [npm](#).
- [Python](#) including [pip](#).

Install some additional Python applications, globally or for the current user:

```
pip install --user pipenv cookiecutter autopep8
```

Then change into a directory, usually used for your projects and invoke:

```
cookiecutter https://github.com/awesto/cookiecutter-django-shop
```

You will be asked a few question. If unsure, just use the defaults. This creates a directory named `my-shop`, or whatever you have chosen. This generated directory is the base for adopting this project into your *merchant implementation*. For simplicity, in this tutorial, it is referred as `my-shop`. Change into this directory and install the missing dependencies:

```
cd my-shop
pipenv install --sequential
npm install
```

This demo shop must initialize its database and be filled with content for demonstration purpose. Each of these steps can be performed individually, but for simplicity we use a Django management command which wraps all these command into a single one:

```
pipenv run ./manage.py initialize_shop_demo
```

Finally we start the project, using Django's built-in development server:

```
export DJANGO_DEBUG=1
pipenv run ./manage.py runserver
```

Point a browser onto <http://localhost:8000/> and check if everything is working. To access the backend at <http://localhost:8000/admin/>, log in using username *admin* with password *secret*.

Note: The first time, **django-SHOP** renders a page, images must be thumbnailed and cropped. This is an expensive operation which runs only once. Therefore please be patient, when loading a page for the first time.

3.1.3 Overview

What you see here is a content management system consisting of many pages. By accessing the Django administration backend at **Home > django CMS > Pages**, one gets an overview of the page-tree structure. One thing which immediately stands out is, that all pages required to build the shop, are actually pages, served by **django-CMS**. This means that the complete sitemap (URL structure) of a shop, can be reconfigured easily to the merchants needs.

3.1.4 Adding pages to the CMS

If we want to add pages to the CMS which have not been installed with the demo, we must sign in as a Django staff user. If our demo has been loaded through one of the prepared fixtures, use user *admin* with password *secret*. After signing in, a small arrow appears on the top right in our browser. Clicking on that arrow expands the Django-CMS toolbar.



Click on the menu item named **example.com** and select **Pages ...**. This opens the Django-CMS *Page Tree*. In **django-SHOP**, every page, can be rendered by the CMS. Therefore, unless we need a special landing page, we can start immediately with the *Catalog's List View* of our products.

Click on **New Page** to create a new Page. As its **Title** choose whatever seems appropriate. Then change into the **Advanced Settings** at the bottom of the page. In this editor window, locate the field **Template** and choose the default.

Change into **Structure** mode and locate the placeholder named **Main Content**, add a **Container**-plugin, followed by a **Row**-, followed by one or more **Column**-plugins. Choose the appropriate width for each column, so that for any given breakpoint, the widths units sum up to 12. Below that column, add whatever is appropriate for that page. This is how in **django-CMS** we add components to our page placeholders.

The default template provided with the demo contains other placeholders. One shall be used to render the breadcrumb. By default, if no **Breadcrumb**-plugin has been selected, it shows the path to the current page. By clicking on the ancestors, one can navigate backwards in the page-tree hierarchy.

3.1.5 Next Chapter

In the next chapter of this tutorial, we will see how to organize the *Catalog Views*

3.2 Catalog Views

In **django-SHOP**, every URL, which points to a page visible by the customer, is managed by the CMS. This means that we are completely free, in how we organize the structure of our page-tree. There are however a few things to consider, when building a working e-commerce site.

The catalog page(s) is where we present the products, we want to sell. In a shop, we can add as many catalog pages to the CMS, but there should be at least one, even if the shop only sells one product exclusively.

When editing the CMS page used for the products list view, open **Advanced Settings** and choose **Products List** from the select box labeled **Application**.

Then choose a template with at least one **placeholder**. Click onto **View on site** to change into front-end editing mode. Locate the main placeholder of the template, and from section **Bootstrap**, add a **Container**-plugin, followed by a **Row**-, followed by a **Column**-plugin. Below that column add a **Catalog List Views**-plugin from section **Shop**. Then publish the page, it should not display any products yet.

Django-SHOP does not distinguish between categories and a catalog pages. If our shop needs a hierarchy of different categories, we organize them using many catalog pages nested into each other. Each product can be assigned to as many catalog pages as we want.

3.2.1 Assign products to their category

In Django's administration backend, find the list view for products. Depending on the name of a given product type, this can be **Home > My Shop > Commodities**, **Home > My Shop > Products**, or similar. Choose an item of that list to open the product's detail editor. Locate the many-to-many select box labeled **Categories > Cms pages**. Select one or more CMS pages where the given product shall appear on.

On reloading the catalog page, the assigned products shall now be visible in their list view. Assure that they have been set to be active, otherwise they won't show up.

If we nest categories, products assigned to children will be also be visible on their parents pages.

Configure Pagination

The serializer used to create the list of products for the catalog's view, usually only renders a subset, adding links pointing to other URLs for fetching neighboring subsets of that list. We also name this "pagination". The component rendering the catalog's list view offers three different types of pagination:

- Adding a paginator, where the customer can choose the neighboring page manually.
- Adding a simple paginator button, where by clicking one can extend the existing list of products.
- An automatic paginator, which triggers the extension of catalog's list, whenever the customer scrolls to the end of the page. We name this infinite scroll.

Note: If manual pagination is selected, **django-SHOP** tries to prevent widows – these are single items spawning over the last row. Say that the grid of the list can show 53 items, then the 16th item is hidden. If however we want to render 44 items, then it is visible. A side-effect of this feature is, that the 16th item is rendered again on the following page.

3.2.2 Product Detail Views

In **django-SHOP**'s frontend, each product can be rendered using their own detail view. However, we neither have to, nor can't create a CMS page for each product. This is, because we have to store the properties of a product, such as a unit price, product code, availability, etc. inside a Django model. It furthermore would be tedious to create one CMS page per product, to render its detail view. Therefore, products have to be assigned to their categories, rather than being children of thereof.

This approach allows us to use CMS pages tagged as *Catalog List*, as product categories. Furthermore, we can assign a product to more than one such category.

As with regular Django views, the product detail view is rendered by adding the product to the context, and using a Django template to render HTML. If the product has custom properties, they shall be referred by that template.

In the merchant implementation, each product type can provide their own template referring exactly the properties of that model. On rendering, **django-SHOP** converts the classname of a product to lowercase. Say, we want to render the detail view of an instance of our class `SmartCard`. Then we look for a template named

1. `myshop/catalog/smartcard-detail.html`
2. if not found, then `myshop/catalog/product-detail.html`
3. if not found, then `shop/catalog/product-detail.html`

Inside this template we refer the properties as usual, for instance

```
<ul class="list-group">
  <li class="list-group-item">
    <div class="w-50">Product Code:</div>
    <strong>{{ product.product_code }}</strong>
  </li>
  <li ...
</ul>
```

Django-CMS offers a useful templatetag to access the product backend editor, while navigating on the product's detail view. The following HTML snippet renders the product title

```
{% load cms_tags %}
<h1>{% render_model product "product_name" %}</h1>
```

with the possibility, that authenticated staff users may double click onto the title. In case the CMS is in edit mode, the product's backend editor pops up and, allowing front-end editing by its users.

3.2.3 Product Model Serializers

We already learned how to write model classes and model managers, so what are serializers for?

In **django-SHOP** the response views do not distinguish whether the product's information shall be rendered as HTML or transferred via JSON. This gives us the ability to use the same business logic for web browsers rendering static HTML, single page web applications communicating via AJAX or native shopping applications for your mobile devices. This btw. is one of the great benefits when working with **RESTful** API's and thanks to the **django-rest-framework** we don't even have to write any Django Views anymore.

Let's recap the shop's catalog list view. There we need some functionality to render a list of all products and we need a detail view to render each product type. The **django-SHOP** framework supplies two such serializers:

Serialize the Products for the List View

For each product we want to display in a list view, we need a serializer which converts the content of the most important fields of a product. Normally these are the Id, the product name, the URL (onto the detail view), the product type, the price, a caption (short description) and some media field to render a sample image.

For this purpose, the **django-SHOP** framework provides a default serializer, `shop.serializers.default.product_summary.ProductSummarySerializer`, which handles the most common use cases. If required, it can be replaced by a customized implementation. Such a serializer can be configured using a settings variable.

During development, it can be useful to examine what data this serializer delivers. In **django-SHOP** the easiest way to achieve this, is to append `?format=api` to the URL on the catalog's list view. This will show the context data to render the catalog, but without embedding it into HTML.

Serializer for the Product's Detail View

The serializer for the Product's Detail View is very similar to its counterpart, the just described `ProductSummarySerializer`. By default, the **django-SHOP** framework uses the serializer `shop.serializers.bases.ProductSerializer`. This serializer converts all properties of the product model into a serialized representation. Of course, this serializer can also be replaced by a custom implementation. Such a serializer can be configured by adopting the Detail View class, and is explained in the programmers reference.

During development, it can be useful to examine what data this serializer delivers. The easiest way to achieve this, is to append `?format=api` to the URL on the product's detail view. This will show the context data to render the product detail view, but without embedding it into HTML.

The AddToCartSerializer

Rather than using the detail serializer, the business logic for adding a product to the cart has been moved into a specialized serializer. This is because in **django-SHOP** products can either be added to the cart from within the detail view¹, or from their catalog list view. We also need a way to add more than one product variant to the cart from each products detail page.

For this purpose **django-SHOP** is shipped with an `AddToCartSerializer`. It can be overridden for special product requirements, but for a standard applications, the default implementation should just work out of the box.

During development, it can be useful to examine what data this serializer delivers. The easiest way to achieve this, is to append `/add-to-cart?format=api` to the URL on the product's detail view. This will show the interface with which the add-to-cart form communicates.

Ensure that the context for rendering a product contains the key `product` referring to the product object – this is the default behavior. Then add

```
{% include "shop/catalog/product-add2cart.html" %}
```

to an appropriate location in the template which renders the product detail view.

The now included add-to-cart template contains a form with some input fields and a few AngularJS directives, which communicate with the endpoint connected to the `AddToCartSerializer`. It updates the subtotal whenever the customer changes the quantity and optionally displays a nice popup window, whenever an item is added to the cart. Of course, that template can be extended with arbitrary HTML.

These Angular JS directives require some JavaScript code which is located in the file `shop/js/catalog.js`; it is referenced automatically when using the above template include statement.

¹ Specially in business-to-business sites, this usually is done in the list views.

3.2.4 Understanding the Routing

Behind the scenes, **django-CMS** allows us to attach Django Views to any existing CMS page using a so called **apphook**. This means, that accessing a CMS page or any child of it, can implicitly invoke a Django View. To achieve this, in the CMS page’s *Advanced Settings*, that *apphook* must be selected from the drop-down menu named “Application”.

In our implementation, such an *apphook* can be implemented as:

```
from django.conf.urls import url
from shop.views.catalog import AddToCartView, ProductListView, ProductRetrieveView
from shop.cms_apphooks import CatalogListCMSApp

class CatalogListApp(CatalogListCMSApp):
    def get_urls(self, page=None, language=None, **kwargs):
        return [
            url(r'^$', ProductListView.as_view()),
            url(r'^(?P<slug>[\w-]+)/?$', ProductRetrieveView.as_view()),
            url(r'^(?P<slug>[\w-]+)/add-to-cart', AddToCartView.as_view()),
        ]

apphook_pool.register(CatalogListApp)
```

All what this apphook does, is to set special routes to either, the catalog’s list view, here `shop.views.catalog.ProductListView`, or to the product’s detail view, here `shop.views.catalog.ProductRetrieveView`, or to the add-to-cart view, here `shop.views.catalog.AddToCartView`.

Such an apphook allows us to extend an existing CMS page with classic Django Views routed onto sub-URLs of our page. Here we create additional routes, on top of the existing CMS page. These three views also serve another purpose: They enrich the rendering context by a Python dictionary named `product`, it contains the serialized representation to render the corresponding templates.

3.2.5 Next Chapters

One of the unique features of **django-SHOP**, is the possibility to choose and/or override its product models. Depending on the kind of product model selected through the cookiecutter template, proceed with one of the following chapters from one of these tutorials:

- *The Commodity Product Model*
- *The Smart Card Product Model*
- *The Polymorphic Product Model*

3.3 The Commodity Product Model

The demo provided by `cookiecutter-django-shop` using the product model “commodity”, shows how to setup a shop, with a single generic product, named **Commodity**. The product model `shop.models.defaults.commodity.Commodity` is part of the **django-SHOP** framework. It is intended for shops where the merchant does not want to create a customized product model, but rather prefers to create the product’s detail views using common CMS functionality. Here for demonstration purpose we try to sell a house, hence it is practical that we can layout our CMS page the way we want to and we can add whatever Django-CMS plugins are available.

A **Commodity** model contains only the following properties:

- The name of the product.

- The product code.
- The `slug` (a short label used as the last bit in the URLs).
- The product's unit price.
- One sample image to be shown in the catalog's list view.
- A caption to be shown in the catalog's list view.

The detail view for each product shall however be styled individually using a **django-CMS** placeholder together with the plugin system provided, for instance by `djangoCMS-cascade`. This gives the merchant all the flexibility to style each product's detail page individually and without having to create a special HTML template. It is thus best suited for types of products with a high degree of customization. Hence in the demo, a house was used to show a product detail page, filled with standard components from the CMS. Into this placeholder we then can add as many text fields as we want. Additionally we can use image galleries, carousels, different backgrounds, tab sets, etc.

The `commodity` demo contains just one product, a splendid villa. In such a situation, we usually don't want to render the catalogs list view with one item, but instead want to get redirected onto our lonely product. This can be achieved by reconfiguring the catalogs list view, and is explained in the reference sections.

Using the **Commodity** product model only makes sense, if the merchant does not require special product properties and normally is only suitable for shops with up to a dozen articles. Otherwise, creating a reusable HTML template is probably less effort, than filling the placeholder for each product's detail page individually.

3.3.1 The Base Template

Even though we can show the complete information about a (Commodity-) product using standard components, provided by **django-CMS** and/or `djangoCMS-cascade`, we still have to provide a base template with a placeholder. Since the **django-SHOP** framework doesn't want to know anything about the skeleton of a page, this base template must be contributed by the merchant implementation.

On the assumption that the product's detail view renders a product of type "Commodity", **django-SHOP** looks for a template named

1. `myshop/catalog/commodity-detail.html`
2. if not found, then `myshop/catalog/product-detail.html`
3. if not found, then `shop/catalog/product-detail.html`

Note that all names are lowercased, while searching for the matching template. Such a base template must contain the `templatetag`

```
{% load cms_tags %}
...
{% render_placeholder product.placeholder %}
```

Here the placeholder is a special field `cms.models.fields.PlaceholderField` in our Django model `Commodity`. It is the equivalent to the placeholder otherwise used in regular **django-CMS** page templates. This placeholder field can be added to all Django models for any other product type and is useful, in case the merchant wants to add some optional and/or unstructured information to its product model. This for instance, can be specially convenient to add a video, a downloadable datasheet, or other useful information about the product.

3.3.2 The Internationalized Commodity Product Model

If support for multiple languages is enabled, some of the properties can be translated into different natural languages. In the demo for the product model "commodity", these properties then become translatable:

- The name of the product.
- The slug.
- A caption to be shown in the catalog's list view.

Using this internationalized version, requires to configure `I18N = True` in the `settings.py` of the project. Additionally, the third party app [django-parler](#) must be installed. By doing so, the product model from above `shop.models.defaults.commodity.Commodity`, is replaced by an internationalized version.

All other product properties, such as unit price and product code are shared across all languages.

3.3.3 Add Commodity to Cart

One plugin which should always be present on a product's detail page, is the **Add Product to Cart**, as found in section **Shop**. Otherwise a customer wouldn't be able to purchase that product. In the provided demo, we sell one house, hence the usual quantity doesn't make sense. By using a slightly modified template, the quantity fields is hidden.

It often makes sense to override the "add-to-cart" template for special product models. If for instance a product has variations, this is where we would add additional choice fields so that the customer can select different properties, such as size, color, etc.

3.3.4 Next Chapter

In the next chapter of this tutorial, we will see how to organize the *Cart and Checkout*

3.4 The Smart Card Product Model

The demo provided by [cookiecutter-django-shop](#) using the product model "smartcard", shows how to setup a shop, with a single product type. In our example we use a Smart Card for it. Here the Django model is managed by the merchant implementation.

Smart Cards have many different attributes such as their card type, the manufacturer, storage capacity and the maximum transfer speed. Here it's the merchant's responsibility to create the database model according to the physical properties of the product. The model class to describe a Smart Card therefore is not part of the shop's framework, but rather in the merchant's implementation as found in our example.

Creating a customized product model, requires only a few lines of declarative Python code. Here is a simplified example:

```
from django.db import models
from shop.models.product import BaseProduct, BaseProductManager, CMSPageReferenceMixin
from shop.money.fields import MoneyField

class SmartCard(CMSPageReferenceMixin, BaseProduct):
    product_name = models.CharField(
        max_length=255,
        verbose_name="Product Name",
    )

    slug = models.SlugField(verbose_name="Slug")

    caption = models.TextField(
        "Caption",
        help_text="Short description used in the catalog's list view.",
    )
```

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```

    )

    description = models.TextField(
        "Description",
        help_text="Long description used in the product's detail view.",
    )

    order = models.PositiveIntegerField(
        "Sort by",
        db_index=True,
    )

    cms_pages = models.ManyToManyField(
        'cms.Page',
        through=ProductPage,
        help_text="Choose list view this product shall appear on.",
    )

    images = models.ManyToManyField(
        'filer.Image',
        through=ProductImage,
    )

    unit_price = MoneyField(
        "Unit price",
        decimal_places=3,
        help_text="Net price for this product",
    )

    card_type = models.CharField(
        "Card Type",
        choices=[(t, t) for t in ('SD', 'SDXC', 'SDHC', 'SDHC II')],
        max_length=9,
    )

    product_code = models.CharField(
        "Product code",
        max_length=255,
        unique=True,
    )

    storage = models.PositiveIntegerField(
        "Storage Capacity",
        help_text="Storage capacity in GB",
    )

    class Meta:
        verbose_name = "Smart Card"
        verbose_name_plural = "Smart Cards"
        ordering = ['order']

    lookup_fields = ['product_code__startswith', 'product_name__icontains']

    objects = BaseProductManager()

    def get_price(self, request):
        return self.unit_price

```

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```

def __str__(self):
    return self.product_name

@property
def sample_image(self):
    return self.images.first()

```

Let's examine this product model. Our `SmartCard` inherits from the abstract `shop.models.product.BaseProduct`, which is the base class for any product. It only contains a minimal amount of fields, because **django-SHOP** doesn't make any assumptions about the product's properties. Additionally this class inherits from the mixin `shop.models.product.CMSPageReferenceMixin`, which adds some functionality to handle CMS pages as product categories.

In this class declaration, we use one field for each physical property of our Smart Cards, such as card type, storage, transfer speed, etc. Using one field per property allows us to build much simpler interfaces, rather than e-commerce solutions, which use a one-size-fits-all approach, attempting to represent all product's properties. Otherwise, this product model class behaves exactly like any other [Django model](#).

In addition to the properties, the example above contains these extra fields:

- `slug`: This is the URL part after the category part.
- `order`: This is an integer field to remember the sorting order of products.
- `cms_pages`: A list of CMS pages, this product shall appear on.
- `images`: A list of images of this product.

The list in `lookup_fields` is used by the `Select2`-widget, when searching for a product. This is often required, while setting internal links onto products.

In **django-SHOP**, the field `unit_price` is optional. Instead, each product class must provide a method `get_price()`, which shall return the unit price for the catalog's list view. This is because products may have variations with different price tags, or prices for different groups of customers. Therefore the unit price must be computed per request, rather than being hard coded into a database column.

3.5 An Internationalized Smart Card Model

If in the demo provided by [cookiecutter-django-shop](#), support for multiple languages (I18N) is enabled, the product model for our Smart Card changes slightly.

First ensure that `django-parler` is installed and `'parler'` is listed in the project's `INSTALLED_APPS`. Then import some extra classes into the project's `models.py` and adopt the product class. Only the relevant changes to our model class are shown here:

```

...
from parler.managers import TranslatableManager, TranslatableQuerySet
from polymorphic.query import PolymorphicQuerySet
...

class ProductQuerySet(TranslatableQuerySet, PolymorphicQuerySet):
    pass

class ProductManager(BaseProductManager, TranslatableManager):
    queryset_class = ProductQuerySet

```

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```

def get_queryset(self):
    qs = self.queryset_class(self.model, using=self._db)
    return qs.prefetch_related('translations')

class SmartCard(CMSPageReferenceMixin, TranslatableModelMixin, BaseProduct):
    ...
    caption = TranslatedField()
    description = TranslatedField()
    ...

class SmartCardTranslation(TranslatedFieldsModel):
    master = models.ForeignKey(
        SmartCard,
        related_name='translations',
        null=True,
    )

    caption = models.TextField(
        "Caption",
        help_text="Short description used in the catalog's list view.",
    )

    description = models.TextField(
        "Description",
        help_text="Long description used in the product's detail view.",
    )

    class Meta:
        unique_together = (('language_code', 'master'))

```

For this model we decided to translate the fields `caption` and `description`. The product name of a Smart Card is international anyways and doesn't have to be translated into different languages. Hence we neither use a translatable field for the product name, nor its slug. On the other hand, if it makes sense to translate the product name, then we'd simply move these fields into the related class `SmartCardTranslation`. This gives us all the flexibility we need to model our products according to their physical properties, and prevents that the administrator of the site has to enter redundant data through the administration backend, while creating or editing an instance.

3.6 Add Product Model to Django Admin

In order to make our Smart Card editable, we have to register it in the Django administration backend:

```

from django.contrib import admin
from adminsortable2.admin import SortableAdminMixin
from shop.admin.product import CMSPageAsCategoryMixin, ProductImageInline,
↳ InvalidateProductCacheMixin
from myshop.models import SmartCard

@admin.register(SmartCard)
class SmartCardAdmin(InvalidateProductCacheMixin, SortableAdminMixin,
↳ CMSPageAsCategoryMixin, admin.ModelAdmin):
    fields = ['product_name', 'slug', 'product_code', 'unit_price', 'active', 'caption
↳ ', 'description',
            'storage', 'card_type']

```

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```

inlines = [ProductImageInline]
prepopulated_fields = {'slug': ['product_name']}
list_display = ['product_name', 'product_code', 'unit_price', 'active']

```

This is a typical implementation of a Django `ModelAdmin`. This class uses a few additions however:

- `shop.admin.product.InvalidateProductCacheMixin`: After saving a product instance, all caches are going to be cleared.
- `adminsortable2.admin.SortableAdminMixin`: Is used to add sorting capabilities to the backend list view.
- `shop.admin.product.CMSPageAsCategoryMixin`: Is used to assign a product to one ore more CMS pages, tagged as Categories.
- `shop.admin.product.ProductImageInline`: Is used to assign a one ore more images to a product and sort them accordingly.

3.6.1 With I18N support

If multilingual support is required, then we also must add a possibility to make some fields translatable:

```

from parler.admin import TranslatableAdmin
...
class SmartCardAdmin(InvalidateProductCacheMixin, SortableAdminMixin,
    ↳TranslatableAdmin, CMSPageAsCategoryMixin, admin.ModelAdmin):
    ...

```

For detail, please refer to the documentation provided by [django-parler](#).

3.7 Next Chapter

In the next chapter of this tutorial, we will see how to organize the *Cart and Checkout*

3.8 The Polymorphic Product Model

The demo provided by [cookiecutter-django-shop](#) using the product model “polymorphic”, shows how to setup a shop, with different product types. This is where [polymorphism](#) enters the scene. In our example we use a combination from the simpler demos “commodity” and “smartcard”.

Since in this example, we have to specialize our product out of a common base, the properties for each product type are shared accross two models. In our demo, the base model is declared by the class `myshop.models.Product`. Here we store the properties common to all product types, such as the product’s name, a caption, etc.

The model classes for Smart Card, Smart Phone and a variation of Commodity then inherits from this base product class. These models additionally declare their model fields, which are required to describe the physical properties of each product type. Since they vary, we also have to create special templates for the detail views of each of them. Smart Phones for instance allow product variations, therefore we must adopt the template for adding the product to the cart.

3.8.1 The Internationalized Polymorphic Product Model

The `i18n_polymorphic` demo is a variation of the above example, with a few attributes translated into multiple languages, namely `caption` and `description`. This sample implementation does not use translated slugs, although it would be possible.

3.8.2 Next Chapter

In the next chapter of this tutorial, we will see how to organize the *Cart and Checkout*

3.9 Cart and Checkout

In **django-SHOP**, the cart and checkout view follow the same idea as all other pages – they are managed by the CMS. Change into the Django admin backend and look for the CMS page tree. A good position for adding a page is the root level, but then assure that in Advanced Setting the checkbox **Soft root** is set.

The checkout can be combined with the cart on the same page or moved on a separate page. Its best position normally is just below the Cart page.

The Checkout pages presumably are the most complicated page to setup. Therefore no generic receipt can be presented here. Instead some CMS plugins will be listed here. They can be useful to compose a complete checkout page. In the reference section it is shown in detail how to create a *Cart and Checkout* view, but for this tutorial the best way to proceed is to have a look in the prepared demo project for the *Cart* and *Checkout* pages.

A list of plugins specific to **django-SHOP** can be found in the reference section. They include a cart editor, a static cart renderer, forms to enter the customers names, addresses, payment- and shipping methods, credit card numbers and some more.

Other useful plugins can be found in the Django application [djangocms-cascade](#).

A list of plugins specific to **django-SHOP** can be found in the reference section. They include a cart editor, a static cart renderer, forms to enter the customers names, addresses, payment- and shipping methods, credit card numbers and some more.

Other useful plugins can be found in the Django application `djangocms-cascade`.

Depending on who is allowed to buy products, keep in mind that visitors must declare themselves whether they want to buy as guest or as registered user. This means that we first must distinguish between visitor and recognized customer. The simplest way to do this is to use the Segmentation **if-** and **else**-plugin. A recognized customer shall be able to proceed directly to the purchasing page. A visitor first must declare himself, this could be handled with a collections of plugins, such as:

in structure mode. This collection of plugins then will be rendered as:

Please note that the Authentication plugins **Login & Reset**, **Register User** and **Continue as guest** must reload the current page. This is because during these steps a new session-id is assigned, which requires a full page reload.

After reloading the page, the customer is considered as “recognized”. Since there are a few forms to be filled, this example uses a **Process Bar** plugin, which emulates a few sub-pages, which then can be filled out by the customer step-by-step.

Main Content Container
EXPAND ALL

▼ Simple Wrapper Naked Wrapper

▼ Segment *if* customer.is_recognized

▼ Row with 1 column

▼ Column default width: 12 units

▼ Process Bar with 3 pages

▼ Process Step

▼ Segment *if* customer.is_registered

Customer Form

▼ Segment *else*

Guest Form

Next Step Button Weiter

▼ Process Step

Shipping Address Form

Billing Address Form

Next Step Button Weiter

▼ Process Step

Cart Static Cart

Payment Method Form

Shipping Method Form

Extra Annotation Form

Accept Condition Ich habe die ...

Proceed Button Jetzt Kaufen

► Segment *else*

A fragment of this collection of plugins then will be rendered as:

1

2

3

Addressee ✓

Supplement

Street ✓

ZIP ✖ This field is required. **Location** ✓

Country ✓

☒ Use shipping address for billing

Next >

Reference to classes and concepts used in **django-SHOP**

4.1 Customer Model

Most web applications distinguish logged in users explicitly from *the* anonymous site visitor, which is regarded as a non-existing user, and hence does not reference a session- or database entity. The Django framework, in this respect, is no exception.

This pattern is fine for web-sites, which run a Content Management System or a Blog, where only an elected group of staff users shall be permitted to access. This approach also works for web-services, such as social networks or Intranet applications, where visitors have to authenticate right on from the beginning of their session.

But when running an e-commerce site, this use-pattern has serious drawbacks. Normally, a visitor starts to look for interesting products, hopefully adding a few of them to their cart. Then on the way to checkout, they decide whether to create a user account, use an existing one or continue as guest. Here's where things get complicated.

First of all, for non-authenticated site visitors, the cart does not belong to anybody. But each cart must be associated with *its* current site visitor, hence the generic anonymous user object is not appropriate for this purpose. Unfortunately the Django framework does not offer an explicit but anonymous user object based on the assigned `Session-Id`.

Secondly, at the latest when the cart is converted into an order, but the visitor wants to continue as guest (thus remaining anonymous), that order object *must* refer to an user object in the database. These kind of users would be regarded as *fakes*: Unable to log in, reset their password, etc. The only information which must be stored for such a faked user, is their email address otherwise they couldn't be informed, whenever the state of their order changes.

Django does not explicitly allow such user objects in its database models. But by using the boolean flag `is_active`, we can fool an application to interpret such a *guest visitor* as a faked anonymous user.

However, since such an approach is unportable across all Django based applications, **django-SHOP** introduces a new database model – the `Customer` model, which extends the existing `User` model.

4.1.1 Properties of the Customer Model

The `Customer` model has a 1:1 relation to the existing `User` model, which means that for each customer, there always exists *one and only one* user object. This approach allows us to do a few things:

The built-in `User` model can be swapped out and replaced against another implementation. Such an alternative implementation has a small limitation. It must inherit from `django.contrib.auth.models.AbstractBaseUser` and from `django.contrib.auth.models.PermissionMixin`. It also must define all the fields which are available in the default model as found in `django.contrib.auth.models.User`.

By setting the flag `is_active = False`, we can create guests inside Django's `User` model. Guests can not sign in, they can not reset their password, and hence can be considered as “materialized” anonymous users.

Having guests with an entry in the database, gives us another advantage: By using the session key of the site visitor as the user object's `username`, it is possible to establish a link between a `User` object in the database with an otherwise anonymous visitor. This further allows the `Cart` and the `Order` models always refer to the `User` model, since they don't have to care about whether a certain user authenticated himself or not. It also keeps the workflow simple, whenever an anonymous user decides to register and authenticate himself in the future.

4.1.2 Adding the Customer model to our application

As almost all models in **django-SHOP**, the `Customer` model itself, uses the *Deferred Model Pattern*. This means that the Django project is responsible for materializing that model and additionally allows the merchant to add arbitrary fields to *his* `Customer` model. Sound choices are a phone number, birth date, a boolean to signal whether the customer shall receive newsletters, his rebate status, etc.

The simplest way is to materialize the given `Customer` class as found in our default and convenience models:

```
from shop.models.defaults.customer import Customer
```

or, if we need extra fields, then instead of the above, we create a customized `Customer` model:

```
from shop.models.customer import BaseCustomer

class Customer(BaseCustomer):
    birth_date = models.DateField("Date of Birth")
    # other customer related fields
```

Configure the Middleware

A `Customer` object is created automatically with each visitor accessing the site. Whenever Django's internal `AuthenticationMiddleware` adds an `AnonymousUser` to the request object, then the **django-SHOP**'s `CustomerMiddleware` adds a `VisitingCustomer` to the request object as well. Neither the `AnonymousUser` nor the `VisitingCustomer` are stored inside the database.

Whenever the `AuthenticationMiddleware` adds an instantiated `User` to the request object, then the **django-SHOP**'s `CustomerMiddleware` adds an instantiated `Customer` to the request object as well. If no associated `Customer` exists yet, the `CustomerMiddleware` creates one.

Therefore add the `CustomerMiddleware` *after* the `AuthenticationMiddleware` in the project's `settings.py`:

```
MIDDLEWARE_CLASSES = (
    ...
    'django.contrib.auth.middleware.AuthenticationMiddleware',
    'shop.middleware.CustomerMiddleware',
```

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```

    ...
)

```

Configure the Context Processors

Additionally, some templates may need to access the customer object through the `RequestContext`. Therefore, add this context processor to the `settings.py` of the project.

```

TEMPLATE_CONTEXT_PROCESSORS = (
    ...
    'shop.context_processors.customer',
    ...
)

```

Implementation Details

The `Customer` model has a non-nullable one-to-one relation to the `User` model. Therefore each customer is associated with exactly one user. For instance, accessing the hashed password can be achieved through `customer.user.password`. Some common fields and methods from the `User` model, such as `first_name`, `last_name`, `email`, `is_anonymous()` and `is_authenticated()` are accessible directly, when working with a `Customer` object. Saving an instance of type `Customer` also invokes the `save()` method from the associated `User` model.

The other direction – accessing the `Customer` model from a `User` – does not always work. Accessing an attribute that way fails if the corresponding customer object is missing, ie. if there is no reverse relation from a `Customer` pointing onto the given `User` object.

```

>>> from django.contrib.auth import get_user_model
>>> user = get_user_model().create(username='bobo')
>>> print user.customer.salutation
Traceback (most recent call last):
  File "<console>", line 1, in <module>
  File "django/db/models/fields/related.py", line 206, in __get__
    self.related.get_accessor_name())
DoesNotExist: User has no customer.

```

This can happen for `User` objects added manually or by other Django applications.

During database queries, **django-SHOP** always performs an INNER JOIN between the customer and the user table. Therefore it performs better to query the `User` via the `Customer` object, rather than vice versa.

Anonymous Users and Visiting Customers

Most requests to our site will be of anonymous nature. They will not send a cookie containing a session-Id to the client, and the server will not allocate a session bucket. The middleware adds a `VisitingCustomer` object associated with an `AnonymousUser` object to the request. These two objects are not stored inside the database.

Whenever such an anonymous user/visiting customer adds *his first item to the cart*, **django-SHOP** instantiates a user object in the database and associates it with a customer object. Such a customer is considered as “unregistered” and invoking `customer.is_authenticated()` will return `False`; here its associated `User` model is inactive and has an unusable password.

Guests and Registered Customers

On the way to the checkout, a customer must declare himself, whether to continue as guest, to sign in using an existing account or to register himself with a new account. In the former case (customer wishes to proceed as guest), the `User` object remains as it is: Inactive and with an unusable password. In the second case, the visitor signs in using Django's default authentication backends. Here the cart's content is merged with the already existing cart of that user object. In the latter case (customer registers himself), the user object is recycled and becomes an active Django `User` object, with a password and an email address.

Obviate Criticism

Some may argue that adding unregistered and guest customers to the user table is an anti-pattern or hack. So, what are the alternatives?

We could keep the cart of anonymous customers in the session store. This was the procedure used until **django-SHOP** version 0.2. It however required to keep two different models of the cart, one session based and one relational. Not very practical, specially if the cart model should be overridable by the merchant's own implementation.

We could associate each cart models with a session id. This would require an additional field which would be NULL for authenticated customers. While possible in theory, it would require a lot of code which distinguishes between anonymous and authenticated customers. Since the aim of this software is to remain simple, this idea was dismissed.

We could keep the primary key of each cart in the session associated with an anonymous user/customer. But this would make it very hard to find expired carts, because we would have to iterate over all carts and for each cart we would have to iterate over all sessions to check if the primary keys matches. Remember, there is no such thing as an OUTER JOIN between sessions and database tables.

We could create a customer object which is independent of the user. Hence instead of having a `OneToOneField(AUTH_USER_MODEL)` in model `Customer`, we'd have this 1:1 relation with a nullable foreign key. This would require an additional field to store the session id in the customer model. It also would require an additional email field, if we wanted guest customers to remain anonymous users – what they actually are, since they can't sign in. Apart from field duplication, this approach would also require some code to distinguish between unrecognized, guest and registered customers. In addition to that, the administration backend would require two distinguished views, one for the customer model and one for the user model.

4.1.3 Authenticating against the Email Address

Nowadays it is quite common, to use the email address for authenticating, rather than an explicit account identifier. This in Django is not possible without replacing the built-in `User` model. Since for an e-commerce site this authentication variant is rather important, **django-SHOP** is shipped with an optional drop-in replacement for the built-in `User` model.

This `User` model is almost identical to the existing `User` model as found in `django.contrib.auth.models.py`. The difference is that it uses the field `email` rather than `username` for looking up the credentials. To activate this alternative `User` model, add that alternative authentication app to the project's `settings.py`:

```
INSTALLED_APPS = (
    'django.contrib.auth',
    'email_auth',
    ...
)

AUTH_USER_MODEL = 'email_auth.User'
```

Note: This alternative `User` model uses the same database table as the Django authentication would, namely `auth_user`. It is even field-compatible with the built-in model and hence can be added later to an existing Django project.

Caveat when using this alternative User model

The savvy reader may have noticed that in `email_auth.models.User`, the `email` field is not declared as unique. This by the way causes Django to complain during startup with:

```
WARNINGS:
email_auth.User: (auth.W004) 'User.email' is named as the 'USERNAME_FIELD', but it is ↵
↳not unique.
    HINT: Ensure that your authentication backend(s) can handle non-unique usernames.
```

This warning can be silenced by adding `SILENCED_SYSTEM_CHECKS = ['auth.W004']` to the project's `settings.py`.

The reason for this is twofold:

First, Django's default `User` model has no unique constraint on the `email` field, so `email_auth` remains more compatible.

Second, the uniqueness is only required for users which actually can sign in. Guest users on the other hand can not sign in, but *they may return someday*. By having a unique email field, the Django application `email_auth` would lock them out and guests would be allowed to buy only once, but not a second time – something we certainly do not want!

Therefore **django-SHOP** offers two configurable options:

- Customers can declare themselves as guests, each time they buy something. This is the default setting, but causes to have non-unique email addresses in the database.
- Customer can declare themselves as guests the first time they buys something. If someday they return to the site a buy a second time, they will be recognized as returning customer and must use a form to reset their password. This configuration is activated by setting `SHOP_GUEST_IS_ACTIVE_USER = True`. It further allows us, to set a unique constraint on the email field.

Note: The email field from Django's built-in `User` model has a max-length of 75 characters. This is enough for most use-cases but violates [RFC-5321](#), which requires 254 characters. The alternative implementation uses the correct max-length.

Administration of Users and Customers

By keeping the `Customer` and the `User` model tight together, it is possible to reuse the Django's administration backend for both of them. All we have to do is to import and register the customer backend inside the project's `admin.py`:

```
from django.contrib import admin
from shop.admin.customer import CustomerProxy, CustomerAdmin

admin.site.register(CustomerProxy, CustomerAdmin)
```

This administration backend recycles the built-in `django.contrib.auth.admin.UserAdmin`, and enriches it by adding the Customer model as a `StackedInlineAdmin` on top of the detail page. By doing so, we can edit the customer and user fields on the same page.

4.1.4 Summary for Customer to User mapping

This table summarizes to possible mappings between a Django User model¹ and the Shop's Customer model:

Shop's Customer Model	Django's User Model	Active Session
VisitingCustomer object	AnonymousUser object	No
Unrecognized Customer	Inactive User object with unusable password	Yes, but not logged in
Customer recognized as guest ²	Inactive User with valid email address and unusable password	Yes, but not logged in
Customer recognized as guest ³	Active User with valid email address and unusable, but resetable password	Yes, but not logged in
Registered Customer	Active User with valid email address, known password, optional salutation, first- and last names, and more	Yes, logged in using Django's authentication backend

Manage Customers

Django-SHOP is shipped with a special management command which informs the merchant about the state of customers. In the project's folder, invoke on the command line:

```
./manage.py shop_customers
Customers in this shop: total=20482, anonymous=17418, expired=10111, active=1068,
↳ guests=1997, registered=1067, staff=5.
```

Read these numbers as:

- Anonymous customers are those which added at least one item to the cart, but never proceeded to checkout.
- Expired customers are the subset of the anonymous customers, whose session already expired.
- The difference between guest and registered customers is explained in the above table.

Delete expired customers

By invoking on the command line:

```
./manage.py shop_customers --delete-expired
```

This removes all anonymous/unregistered customers and their associated user entities from the database, whose session expired. This command may be used to reduce the database storage requirements.

¹ or any alternative User model, as set by `AUTH_USER_MODEL`.

² if setting `SHOP_GUEST_IS_ACTIVE_USER = False` (the default).

³ if setting `SHOP_GUEST_IS_ACTIVE_USER = True`.

4.2 Deferred Model Pattern

Until **django-SHOP** version 0.2, there were abstract and concrete models: `BaseProduct` and `Product`, `BaseCart` and `Cart`, `BaseCartItem` and `CartItem`, `BaseOrder` and `Order` and finally, `BaseOrderItem` and `OrderItem`.

The concrete models were stored in `shop.models`, whereas abstract models were stored in `shop.models_bases`. This was quite confusing and made it difficult to find the right model definition whenever one had to access the definition of one of the models. Additionally, if someone wanted to subclass a model, he had to use a configuration directive, say `PRODUCT_MODEL`, `ORDER_MODEL`, `ORDER_MODEL_ITEM` from the project's `settings.py`.

This made configuration quite complicated and causes other drawbacks:

- Unless *all* models have been overridden, the native ones appeared in the administration backend below the category *Shop*, while the customized ones appeared under the given project's name. To merchants, this inconsistency in the backend was quite difficult to explain.
- In the past, mixing subclassed with native models caused many issues with circular dependencies.

Therefore in **django-SHOP**, since version 0.9 *all* concrete models, `Product`, `Order`, `OrderItem`, `Cart`, `CartItem` have been removed. These model definitions now all are abstract and named `BaseProduct`, `BaseOrder`, `BaseOrderItem`, etc. They all have been moved into the folder `shop/models/`, because that's the location a programmer expects them.

4.2.1 Materializing Models

Materializing such an abstract base model, means to create a concrete model with an associated database table. This model creation is performed in the concrete project implementing the shop; it must be done for each base model in the shop software.

For instance, materialize the cart by using this code snippet inside our own shop's `models/shopmodels.py` files:

```
from shop.models import cart

class Cart(cart.BaseCart):
    my_extra_field = ...

    class Meta:
        app_label = 'my_shop'

class CartItem(cart.BaseCartItem):
    other_field = ...

    class Meta:
        app_label = 'my_shop'
```

Of course, we can add as many extra model fields to this concrete cart model, as we wish. All shop models, now are managed through *our* project instance. This means that the models **Cart**, **Order**, etc. are now managed by the common database migrations tools, such as `./manage.py makemigration my_shop` and `./manage.py migrate my_shop`. This also means that these models, in the Django admin backend, are visible under **my_shop**.

Use the default Models

Often we don't need extra fields, hence the abstract shop base model is enough. Then, materializing the models can be done using some convenience classes as found in `shop/models/defaults`. We can simply import them into

`models.py` or `models/__init__.py` in our own shop project:

```
from shop.models.defaults.cart import Cart # nopyflakes
from shop.models.defaults.cart_item import CartItem # nopyflakes
```

Note: The comment `nopyflakes` has been added to suppress warnings, since these classes aren't used anywhere in `models.py`.

All the configuration settings from **django-SHOP** <0.9: `PRODUCT_MODEL`, `ORDER_MODEL`, `ORDER_MODEL_ITEM`, etc. are not required anymore and can safely be removed from our `settings.py`.

4.2.2 Accessing the deferred models

Since models in **django-SHOP** are yet unknown during instantiation, one has to access their materialized instance using the [lazy object pattern](#). For instance in order to access the `Cart`, use:

```
from shop.models.cart import CartModel

def my_view(request):
    cart = CartModel.objects.get_from_request(request)
    cart.items.all() # contains the queryset for all items in the cart
```

Here `CartModel` is a lazy object resolved during runtime and pointing on the materialized, or, to say it in other words, real `Cart` model.

4.2.3 Technical Internals

Mapping of Foreign Keys

One might argue, that this can't work, since foreign keys must refer to a real model, not to abstract ones! Therefore one can not add a field `ForeignKey`, `OneToOneField` or `ManyToManyField` which refers an abstract model in the **django-SHOP** project. But relations are fundamental for a properly working software. Imagine a `CartItem` without a foreign relation to `Cart`.

Fortunately there is a neat trick to solve this problem. By deferring the mapping onto a real model, instead of using a real `ForeignKey`, one can use a special “lazy” field, declaring a relation with an abstract model. Now, whenever the models are “materialized”, then these abstract relations are converted into real foreign keys. The only drawback for this solution is, that one may derive from an abstract model only once, but for **django-SHOP** that's a non-issue and doesn't differ from the current situation, where one can subclass `BaseCart` only once anyway.

Therefore, when using this deferred model pattern, instead of using `models.ForeignKey`, `models.OneToOneField` or `models.ManyToManyField`, use the special fields `deferred.ForeignKey`, `deferred.OneToOneField` and `deferred.ManyToManyField`. When Django materializes the model, these deferred fields are resolved into real foreign keys.

Accessing the materialized model

While programming with abstract model classes, sometimes they must access their model manager or their concrete model definition. A query such as `BaseCartItem.objects.filter(cart=cart)` therefore can not function and will throw an exception. To facilitate this, the deferred model's metaclasses adds an additional member `_materialized_model` to their base class, while building the model class. This model class then can be accessed through lazy evaluation, using `CartModel`, `CartItemModel`, `OrderModel`, `OrderItemModel`, etc.

4.3 Money Types

In earlier versions of **django-SHOP**, amounts relating to money were kept inside a `Decimal` type and stored in the database model using a `DecimalField`. In shop installations with only one available currency, this wasn't a major issue, because the currency symbol could be hard-coded anywhere on the site.

However, for sites offering pricing information in more than one currency, this caused major problems. When we needed to perform calculations with amounts that have an associated currency, it is very common to make mistakes by mixing different currencies. It also is common to perform incorrect conversions that generate wrong results. Python doesn't allow developers to associate a specific decimal value with a unit.

Starting with version 0.9, **django-SHOP** ships with a special factory class:

4.3.1 MoneyMaker

This class can not be instantiated, but is a factory for building a money type with an associated currency. Internally it uses the well established `Decimal` type to keep track of the amount. Additionally, it restricts operations on the current Money type. For instance, we can't sum up Dollars with Euros. We also can't multiply two currencies with each other.

Not a Number

In special occurrences we'd rather want to specify "no amount" rather than an amount of 0.00 (zero). This can be useful for free samples, or when an item currently is not available. The `Decimal` type denotes a kind of special value a `NaN` – for "Not a Number". Our Money type therefore inherits this special value, but renders it for instance as € – or \$ –.

Declaring a Money object without a value, say `m = Money()` creates such a special value. The big difference as for the `Decimal` type is that when adding or subtracting a `NaN` to a valid value, it is considered zero, rather than changing the result of this operation to `NaN` as well.

It also allows us to multiply a Money amount with `None`. The result of this operation is `NaN`.

Create a Money type

```
>>> from shop.money import MoneyMaker
>>> Money = MoneyMaker()
>>> print(Money('1.99'))
€ 1.99

>>> print(Money('1.55') + Money('8'))
€ 9.55

>>> print(Money)
<class 'shop.money.money_maker.MoneyInEUR'>

>>> Yen = MoneyMaker('JPY')
>>> print(Yen('1234.5678'))
¥ 1,235

>>> print(Money('100') + Yen('1000'))
ValueError: Can not add/substract money in different currencies.
```

How does this work?

By calling `MoneyMaker()` a type accepting amounts in the *default currency* is created. The default currency can be changed in `settings.py` with `SHOP_DEFAULT_CURRENCY = 'USD'`, using one of the official ISO-4217 currency codes.

Alternatively, we can create our own Money type, for instance `Yen`.

Formatting Money

When the amount of a money type is printed or forced to text using `str(price)`, it is prefixed by the currency symbol. This is fine, when working with only a few currencies. However, some symbols are ambiguous, for instance Canadian, Australian and US Dollars, which all use the “\$” symbol.

With the setting `SHOP_MONEY_FORMAT` we can style how money is going to be printed out. This setting defaults to `{symbol} {amount}`. The following format strings are allowed:

- `{symbol}`: The short symbol for a currency, for instance \$, £, €, ¥, etc.
- `{code}`: The international currency code, for instance USD, GBP, EUR, JPY, etc.
- `{currency}`: The spoken currency description, for instance “US Dollar”, “Pound Sterling”, etc.
- `{amount}`: The amount, unlocalized.

Thus, if we prefer to print `9.98 US Dollar`, then we should set `{amount} {currency}` as the formatting string.

4.3.2 Localizing Money

Depending on our current locale setting, amounts are printed using a localized format.

4.3.3 Money Database Fields

Money can be stored in the database, keeping the currency information together with the field type. Internally, the database uses the `Decimal` type, but such a field knows its currency and will return an amount as `MoneyIn...` type. This prevents implicit, but accidental currency conversions.

In our database model, declare a field as:

```
class Product(models.Model):
    ...
    unit_price = MoneyField(currency='GBP')
```

This field stores its amounts as British Pounds and returns them typed as `MoneyInGBP`. If the `currency` argument is omitted, then the default currency is used.

4.3.4 Money Representation in JSON

An additional `REST SerializerField` has been added to convert amounts into JSON strings. When writing REST serializers, use:


```

from rest_framework import serializers
from shop.money.rest import MoneyField

class SomeSerializer(serializers.ModelSerializer):
    price = MoneyField()

```

The default REST behavior serializes Decimal types as floats. This is fine if we want to do some computations in the browser using JavaScript. However, then the currency information is lost and must be re-added somehow to the output strings. It also is a bad idea to do commercial calculations using floats, yet JavaScript does not offer any Decimal-like type. It therefore is recommended to always do the finance arithmetic on the server and transfer amount information using JSON strings.

4.4 Product Models

Products can vary wildly, and modeling them is not always trivial. Some products are salable in pieces, while others are continues. Trying to define a set of product models, capable for describing all such scenarios is impossible –

4.4.1 Describe Products by customizing the Model

DjangoSHOP requires to describe products instead of prescribing prefabricated models.

All in all, the merchant always knows best how to describe his products!

E-commerce solutions, claiming to be plug-and-play, usually use one of these (anti-)patterns

Either, they offer a field for every possible variation, or they use the [Entity Attribute Value \(EAV\)](#) pattern to add meta-data for each of our models. This at a first glance seems to be easy. But both approaches are unwieldy and have serious drawbacks. They both apply a different “physical schema” – the way data is stored, rather than a “logical schema” – the way users and applications require that data. As soon as we have to combine our e-commerce solution with some Enterprise Resource Planning (ERP) software, additional back-and-forward conversion routines have to be added.

In django-SHOP, the physical representation of a product always maps to its logical

Django-SHOP’s approach to this problem is to have a minimal set of models. These abstract models are stubs providing to subclass the physical models. Hence the logical representation of the product conforms to their physical one. Moreover, it is even possible to represent various types of products by subclassing polymorphically from an abstract base model. Thanks to Django’s Object Relational Mapper, modeling the logical representation for a set of products, together with an administration backend, becomes almost effortless.

Therefore the base class to model a product is a stub which contains only these three fields:

The timestamps for `created_at` and `updated_at`; these are self-explanatory.

A boolean field `active`, used to signalize the products availability.

The attentive reader may wonder, why there not even fields for the most basic requirements of each sellable article, there is no product name, no price field and no product code.

The reason for this is, that **django-SHOP** does not impose any fields, which might require a different implementation for the merchants use case. However, for a sellable commodity some information is fundamental and required. But its up to him how to implement these fields:

The product's name must be implemented as a model field or as a property method, but both must be declared as `product_name`. Use a method implementation for composed and translatable names, otherwise use a database model field with that name.

The product's price must be implemented as a method declared as `get_price(request)` which accepts the request object. This gives the merchant the ability to vary the price and/or its currency depending on the geographic location, the customers login status, the browsers user-agent, or whatever else.

An optional, but highly recommended field is the products item number, declared as `product_code`. It shall return a unique and language independent identifier for each product, to be identifiable. In most cases the product code is implemented by the product model itself, but in some circumstances it may be implemented by the product's variant. The product model `SmartPhone`, as referenced in the demo code, is one such example.

The example section of **django-SHOP** contains a few models which can be copied and adopted to the specific needs of the merchants products. Let's have a look at a few use-cases:

4.4.2 Case study: Smart-Phones

There are many smart-phone models with different equipment. All the features are the same, except for the built-in storage. How shall we describe such a model?

In that model, the product's name shall not be translatable, not even on a multi-lingual site, since smart-phones have international names used everywhere. Smart-phones models have dimensions, an operating system, a display type and other features.

But smart-phone have different equipment, namely the built-in storage, and depending on that, they have different prices and a unique product code. Therefore our product models consists of two classes, the generic smart phone model and the concrete flavor of that model.

Therefore we would model our smart-phones using a database model similar to the following one:

```
from shop.models.product import BaseProductManager, BaseProduct
from shop.money import Money

class SmartPhoneModel(BaseProduct):
    product_name = models.CharField(
        _("Product Name"),
        max_length=255,
    )

    slug = models.SlugField(_("Slug"))

    description = HTMLField(
        help_text=_("Detailed description."),
    )

    manufacturer = models.ForeignKey(
        Manufacturer,
        verbose_name=_("Manufacturer"),
    )

    screen_size = models.DecimalField(
        _("Screen size"),
        max_digits=4,
        decimal_places=2,
    )
    # other fields to map the specification sheet
```

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```

objects = BaseProductManager()

lookup_fields = ('product_name__icontains',)

def get_price(request):
    aggregate = self.variants.aggregate(models.Min('unit_price'))
    return Money(aggregate['unit_price__min'])

class SmartPhoneVariant(models.Model):
    product_model = models.ForeignKey(
        SmartPhoneModel,
        related_name='variants',
    )

    product_code = models.CharField(
        _("Product code"),
        max_length=255,
        unique=True,
    )

    unit_price = MoneyField(_("Unit price"))

    storage = models.PositiveIntegerField(_("Internal Storage"))

```

Lets go into the details of these classes. The model fields are self-explanatory. Something to note here is, that each product requires a field `product_name`. This alternatively can also be implemented as a translatable field using `django-parler`, see below.

Another mandatory attribute for each product is the `ProductManager` class. It must inherit from `BaseProductManager`, and adds some methods to generate special querysets.

Finally, the attribute `lookup_fields` contains a list or tuple of `lookup fields`. These are required by the administration backend, and used when the site editor has to search for certain products. Since the framework does not impose which fields are used to distinguish between products, we must give a hint here.

Each product also requires a method implemented as `get_price(request)`. This must return the unit price using one of the available *Money Types*.

Add multilingual support

Adding multilingual support to an existing product is quite easy and straight forward. To achieve this **django-SHOP** uses the app `django-parler` which provides Django model translations without nasty hacks. All we have to do, is to replace the `ProductManager` with one capable of handling translations:

```

class ProductQuerySet(TranslatableQuerySet, PolymorphicQuerySet):
    pass

class ProductManager(BaseProductManager, TranslatableManager):
    queryset_class = ProductQuerySet

```

The next step is to locate the model fields, which shall be available in different languages. In our use-case thats only the product's description:

```

class SmartPhoneModel(BaseProduct, TranslatableModel):
    # other field remain unchanged
    description = TranslatedField()

```

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```

class ProductTranslation(TranslatedFieldsModel):
    master = models.ForeignKey(
        SmartPhoneModel,
        related_name='translations',
        null=True,
    )

    description = HTMLField(
        help_text=_("Some more detailed description."),
    )

    class Meta:
        unique_together = [('language_code', 'master')]

```

This simple change now allows us to offer the shop's assortment in different natural languages.

Add Polymorphic Support

If besides smart phones we also want to sell cables, pipes or smart cards, we must split our product models into a common- and a specialized part. That said, we must separate the information every product requires from the information specific to a certain product type. Say, in addition to smart phones, we also want to sell smart cards. First we declare a generic `Product` model, which is a common base class of both, `SmartPhone` and `SmartCard`:

```

class Product(BaseProduct, TranslatableModel):
    product_name = models.CharField(
        _("Product Name"),
        max_length=255,
    )

    slug = models.SlugField(
        _("Slug"),
        unique=True,
    )

    description = TranslatedField()

    objects = ProductManager()
    lookup_fields = ['product_name__icontains']

```

Next we only add the product specific attributes to the class models derived from `Product`:

```

class SmartPhoneModel(Product):
    manufacturer = models.ForeignKey(
        Manufacturer,
        verbose_name=_("Manufacturer"),
    )

    screen_size = models.DecimalField(
        _("Screen size"),
        max_digits=4,
        decimal_places=2,
    )

    battery_type = models.PositiveSmallIntegerField(

```

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```

        _("Battery type"),
        choices=BATTERY_TYPES,
    )

    battery_capacity = models.PositiveIntegerField(
        help_text=_("Battery capacity in mAh"),
    )

    ram_storage = models.PositiveIntegerField(
        help_text=_("RAM storage in MB"),
    )
    # and many more attributes as found on the data sheet

class SmartPhone(models.Model):
    product_model = models.ForeignKey(SmartPhoneModel)
    product_code = models.CharField(
        _("Product code"),
        max_length=255,
        unique=True,
    )

    unit_price = MoneyField(_("Unit price"))

    storage = models.PositiveIntegerField(_("Internal Storage"))

class SmartCard(Product):
    product_code = models.CharField(
        _("Product code"),
        max_length=255,
        unique=True,
    )

    storage = models.PositiveIntegerField(help_text=_("Storage capacity in GB"))

    unit_price = MoneyField(_("Unit price"))

    CARD_TYPE = [2 * ('{}{}'.format(s, t),)
                  for t in ('SD', 'SDXC', 'SDHC', 'SDHC II') for s in ('', 'micro ')]
    card_type = models.CharField(
        _("Card Type"),
        choices=CARD_TYPE,
        max_length=15,
    )

    SPEED = [(str(s), "{} MB/s".format(s))
              for s in (4, 20, 30, 40, 48, 80, 95, 280)]
    speed = models.CharField(
        _("Transfer Speed"),
        choices=SPEED,
        max_length=8,
    )

```

If *MyShop* would sell the iPhone5 with 16GB and 32GB storage as independent products, then we could unify the classes `SmartPhoneModel` and `SmartPhone` and move the attributes `product_code` and `unit_price` into the class `Product`. This would simplify some programming aspects, but would require the merchant to add a lot of information twice. Therefore we remain with the model layout presented here.

4.4.3 Caveat using a `ManyToManyField` with existing models

Sometimes we may need to use a `ManyToManyField` for models which are handled by other apps in our project. This for example could be an attribute `files` referring the model `filer.FilerFileField` from the library `django-filer`. Here Django would try to create a mapping table, where the foreign key to our product model can not be resolved properly, because while bootstrapping the application, our `Product` model is still considered to be deferred.

Therefore, we have to create our own mapping model and refer to it using the `through` parameter, as shown in this example:

```
from six import with_metaclass
from django.db import models
from filer.fields.file import FilerFileField
from shop.models import deferred
from shop.models.product import BaseProductManager, BaseProduct

class ProductFile(with_metaclass(deferred.ForeignKeyBuilder, models.Model)):
    file = FilerFileField()
    product = deferred.ForeignKey(BaseProduct)

class Product(BaseProduct):
    # other fields
    files = models.ManyToManyField('filer.File', through=ProductFile)

    objects = ProductManager()
```

Note: Do not use this example for creating a many-to-many field to `FilerImageField`. Instead use `shop.models.related.BaseProductImage` which is a base class for this kind of mapping. Just import and materialize it, in your own project.

4.5 Stock Management

Products in **django-SHOP**, by default do not keep track on their quantity in stock. This is because the product model shall be as lean as possible, and properties shall only be added, if they are required.

There are many shops which simply don't need to keep track their quantity in stock. Either because the products they sell are arbitrarily reproducible, or because they share their stock with an offline store and hence the availability is managed through other means, typically an ERP.

However, for concrete products, keeping track of their limited number of pieces in stock, is mandatory. For this purpose **django-SHOP** offers two mutual exclusive product extensions. Without configured stock management, products tagged as “available” are considered as available until eternity and as unlimited in quantity.

4.5.1 Product with Quantity

A simple approach to keep track on the product's quantity in stock, is to store this information side by side with the product model. This shall be done by adding a model field `quantity`, using an `IntegerField`, `PositiveIntegerField`, `SmallIntegerField`, `PositiveSmallIntegerField`, `FloatField` or a `DecimalField`. The field type shall be the same as that used by the `quantity-field` in `shop.models.cart.CartItemModel`.

In addition to the field storing the quantity in stock, add the mixin class `shop.models.product.AvailableProductMixin` to the product model declaration. Example:

Listing 1: models.py

```

from django.db import models
from shop.models.product import BaseProduct, BaseProductManager, AvailableProductMixin

class MyProduct(AvailableProductMixin, BaseProduct):
    # other product fields

    quantity = model.PositiveIntegerField(default=0)

    class Meta:
        app_label = app_settings.APP_LABEL

    objects = BaseProductManager()

```

The latter mixin class overrides the two methods `get_availability()` and `deduct_from_stock()` taking into account that now the number of products in stock is limited.

4.5.2 Product with Inventory

Sometimes it is not enough to just know the current number of items of a certain product. Consider the use case, where a product is short in supply but the next incoming delivery is already scheduled. In this situation a merchant might want to inform its customers, that the wanted product isn't deliverable now but soon. Therefore, instead of adding a simple field storing the current quantity, we add a relation for each delivered charge. This model then holds a timestamp, when the next incoming delivery is expected. Example:

Listing 2: models.py

```

from django.db import models
from shop.models.product import BaseProduct, BaseProductManager
from shop.models.inventory import BaseInventory, AvailableProductMixin

class MyProduct(AvailableProductMixin, BaseProduct):
    # product fields

    class Meta:
        app_label = app_settings.APP_LABEL

    objects = BaseProductManager()

class MyInventory(BaseInventory):
    product = models.ForeignKey(
        MyProduct,
        related_name='inventory_set',
    )

    quantity = models.PositiveIntegerField(default=0)

```

Since we have a relation from the inventory to our product model, we must use an `InlineModelAdmin`, while creating our admin backend. Example:

Listing 3: admin.py

```

from django.contrib import admin
from myshop.models import MyProduct, Inventory

```

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```
class MyInventoryAdmin(admin.StackedInline):
    model = MyInventory

@admin.register(MyProduct)
class MyProductAdmin(admin.ModelAdmin):
    inlines = [MyInventoryAdmin]
```

This allows the merchant to schedule incoming deliveries.

Selling Short

If the timestamp for arrival is in between a short period of time, **django-SHOP** can *sell short*. Selling short means to sell something which you actually don't own right now, but will own in the future. The period of time for selling short, can be configured using the settings directive `SHOP_SELL_SHORT_PERIOD`, using seconds or a Python `timedelta` object.

Time Limited Offer

An other possibility when using the Inventory relation, is to limit an offer for a determined period of time. This is when the merchant sets the field named `latest` to a time stamp in the near future. If this time stamp is in between the period configured using the settings directive `SHOP_LIMITED_OFFER_PERIOD`, then the customer is notified that this offer is limited in time.

4.5.3 Reserving Products in Cart

Products keeping track of their quantity in stock, either with the simple approach, or with the related inventory model have one behaviour in common – they deduct the number of items only during the purchase operation. For short term product types, this behaviour is impractical, because of the risk of overselling. Imagine a customer putting items into the cart and proceeding to checkout, only to discover that these items are not available in the moment he wants to purchase his items.

Instead we want to reserve items, whenever a customer puts them into his cart. Then these items are blocked for a certain period, normally only a few minutes, until they either have been purchased, or a timeout occurred, making them available for other customers again.

Independently of the chosen approach, replace `AvailableProductMixin` with `ReserveProductMixin` in the product's model declaration. Example for the simple approach:

Listing 4: models.py

```
from shop.models.product import BaseProduct, ReserveProductMixin

class MyProduct(ReserveProductMixin, BaseProduct):
    # product fields
```

Example using the related inventory model. Here we use the class `ReserveProductMixin` from the inventory module:

Listing 5: models.py

```

from shop.models.product import BaseProduct
from shop.models.inventory import ReserveProductMixin

class MyProduct(ReserveProductMixin, BaseProduct):
    # product fields

```

It is important to note, that when reserving products, it easily is possible to seemingly run short of products, because customers just add them to their cart, without actually buying them. This may result in a decrease of overall sales. Hence use this option only, if pending carts are flushed on a regular basis.

4.5.4 Prevent Overselling

in **django-SHOP**, purchasing the cart's content is performed as one transaction. This means that either the cart is converted into an order as a whole, or left as it was before the customer clicked the **Purchase Now**-button.

Now consider the following race-condition: Two customers add the same product to their carts. The quantity of this product is limited in stock. As soon as one customer purchased this item, it is not available anymore for the other customer. In such a situation the whole purchasing operation is canceled for the second customer, so that he can look for an alternative product. If his purchasing operation is canceled, an informative message is displayed, saying that the product unexpectedly became unavailable.

4.6 Catalog

The catalog presumably is that part, where customers of our e-commerce site spend most of their time. Often it even makes sense, to start the *Catalog List View* on the main landing page.

In this documentation we presume that categories of products are built up using specially tagged **django-CMS** pages in combination with a **django-CMS** apphook. This works perfectly well for most implementations, but some sites may require categories implemented independently of the CMS.

Using an external **django-SHOP** plugin for managing categories is a very conceivable solution, and we will see separate implementations for this feature request. Using such an external category plugin can make sense, if an e-commerce site requires hundreds of hierarchical levels and/or these category implementations can provide functionality, which is not available in **django-CMS** pages. If you are going to use externally implemented categories, please refer to their documentation, since in this document, we proceed using standard CMS pages as product categories.

It should be emphasized, that nowadays the classical hierarchy of categories is no longer contemporary. Instead many merchants tag their products with different attributes. This provides a better browsing experience, since customers usually filter by product characteristics, rather than categories.

A nice aspect of **django-SHOP** is, that it doesn't require the programmer to write any special Django Views in order to render the catalog. Instead all merchant dependent business logic goes into a serializer, which in this documentation is referred as `ProductSerializer`.

4.6.1 Catalog List View

In this documentation, the *Catalog List View* is implemented as a **django-CMS** page. Depending on whether the e-commerce aspect of that site is the most prominent part or just a niche of the CMS, select an appropriate location in the page tree and create a new page. This will become the root of our catalog list.

Note: If required, we can add as many catalog list views as we want, and distribute them across the CMS page tree.

But first we must *Create the CatalogListApp*.

Create the CatalogListApp

To retrieve a list of product models, the *Catalog List View* requires a **django-CMS apphook**. For this, we must inherit from `shop.cms_apphooks.CatalogListCMSApp` and add that class declaration to a file named `cms_apps.py`, located in the root folder of our merchant’s project:

Listing 6: myshop/cms_apps.py

```
from cms.apphook_pool import apphook_pool
from shop.cms_apphooks import CatalogListCMSApp
from shop.rest.filters import CMSPagesFilterBackend

class CatalogListApp(CatalogListCMSApp):
    def get_urls(self, page=None, language=None, **kwargs):
        from shop.views.catalog import AddToCartView, ProductListView, \
        ProductRetrieveView

        filter_backends = [CMSPagesFilterBackend]
        filter_backends.extend(api_settings.DEFAULT_FILTER_BACKENDS)
        return [
            url(r'^(?P<slug>[\w-]+)/add-to-cart', AddToCartView.as_view()),
            url(r'^(?P<slug>[\w-]+)/', ProductRetrieveView.as_view()),
            url(r'^$', ProductListView.as_view(
                filter_backends=filter_backends,
            )),
        ]

apphook_pool.register(CatalogListApp)
```

In the page tree editor of **django-CMS**, we create a new page at an appropriate node. As the page title and slug we should use something describing our product catalog in a way, both meaningful to the customers as well as to search engines.

As template, select one with a placeholder large enough to display the figures of the catalog’s list .

Change into the **Advanced Settings** of the CMS page, which shall act as the catalog list. As **Application**, select “*Catalog List*” from the drop-down menu. This selects the apphook `CatalogListApp`, we just created.

Note: After adding or modifying a CMS apphook, we must restart the server.

Then we go into the page’s **Preview** mode and open the **Structure menu** on the right side of the **django-CMS** toolbar. Now locate the placeholder named **Main Content**. Add a Container plugin, followed by a Row and then by a Column plugin. As the child of this column, choose the *Catalog List View* plugin from section **Shop**.

Finally we publish the page, it probably doesn’t contain any products yet. To fill it, we first have to *Assign Products to CMS Pages*.

Remember to repeat this procedure, and add one CMS pages per category, in order to create a structure of pages for our e-commerce site.

Assign Products to CMS Pages

Here the `shop.views.catalog.ProductListView` is configured to render the catalog list of products assigned to one or more CMS pages. For this purpose we use the filter backend `shop.rest.filters.CMSPagesFilterBackend`. In order to decide to which CMS page a product is assigned to, our product model must inherit from `shop.models.product.CMSPageReferenceMixin`. This is because we must add a reference to the CMS pages our products are assigned to. A typical product might be declared as:

```
from shop.models.product import BaseProduct, BaseProductManager, CMSPageReferenceMixin

class MyProduct(CMSPageReferenceMixin, BaseProduct):
    product_name = models.CharField(
        _("Product Name"),
        max_length=255,
    )

    slug = models.SlugField(
        _("Slug"),
        unique=True,
    )

    # other fields making up our product

    cms_pages = models.ManyToManyField(
        'cms.Page',
        through=ProductPage,
        help_text="Choose page this product shall appear on.",
    )

    objects = BaseProductManager()
```

An important part of this product model is the field `cms_pages = ManyToManyField(...)`. Mapping a relationship between CMS pages and products, the merchant can emulate categories by assigning a product to one or more CMS pages. Products added to those CMS pages, then shall be visible in the *Catalog List View* plugin.

As we work with deferred models, we can not use the mapping table, which normally is generated automatically for many-to-many fields by the Django framework. Instead, we must refer to the mapping table `shop.models.defaults.mapping.ProductPage` explicitly, using the `through` parameter, when declaring the field `cms_pages`.

Product Summary Serializer

In order to render the list view, we need to identify the fields common to all offered products. This is because when rendering a list view, we usually want to have a consistent representation for all products in our catalog. Since this catalog list can be rendered either by the server using the class `shop.rest.renderers.CMSPageRenderer`, or by the client using the AngularJS directive `shop-catalog-list`, we must provide some functionality to serialize a summary representation for all the products we want to list. This separation is important, so that we can reuse the view class `shop.views.catalog.ProductListView`, whenever we switch from the server-side rendered catalog list into infinite scroll mode, which for technical reasons can only be rendered by the client.

For this purpose, we have to declare a product summary serializer using the configuration directive `SHOP_PRODUCT_SUMMARY_SERIALIZER`. Remember that **django-SHOP** does not impose which fields a product must offer, it's up to the merchant to declare this product summary serializer as well. A typical implementation might look like:

```
class ProductSummarySerializer(ProductSerializer):
    media = serializers.SerializerMethodField(
        help_text="Returns a rendered HTML snippet containing a sample image among_
↳ other elements",
    )

    class Meta(ProductSerializer.Meta):
        fields = ['id', 'product_name', 'product_url', 'product_model', 'price',
↳ 'media']

    def get_media(self, product):
        return self.render_html(product, 'media')
```

Here we assume that our product models have a very limited set of common fields. They may for instance have a field to store a caption text and an image. Those two fields then can be rendered into a HTML snippet, which here we name `media`. Using method `shop.serializers.bases.ProductSerializer.render_html()`, this snippet is rendered by the serializer itself, looking for a Django template following these rules:

- look for a template named `app_label/products/catalog-product-model-name-field-name.html`¹²³, otherwise
- look for a template named `app_label/products/catalog-product-field-name.html`¹³, otherwise
- use the template `shop/product/catalog-product-media.html`.

Note: When rendering images, we have to create a thumbnailed version and put its URL into a `` tag. This means that we then have to know the thumbnailed size of the final image, so that the templatetag `thumb` from the `easythumbnail` library knows what to do. Otherwise we would have to refer to the original, often much heavier image and thumbnail it on the fly, which would be pretty inefficient.

To test if that serializer works properly, we can examine the raw content of the declared fields by appending `?format=api` to the URL of our catalog view. This then renders a human readable representation of the context as JSON.

Customizing the Product Summary Serializer

In case we need serialized content from other fields of our product model, let's add them to a customized product serializer class: For this we use the `serializer fields` from the Django's `RESTFramework` library. This can be useful for product serializers, which shall provide additional information on our catalog list view. If we have to map fields from our product model, just add them to the list of fields in the `Meta`-class. For example as:

```
from shop.serializers.bases import ProductSerializer

class CustomizedProductSerializer(ProductSerializer):
    class Meta:
        model = CustomProductModel
        fields = [all-the-fields-required-for-the-list-view]
```

Additionally, we have to rewrite the `apphook` from above as:

¹ `app_label` is the app label of the project in lowercase.
² `product-model-name` is the class name of the product model in lowercase.
³ `field-name` can be any lowercased identifier, but by convenience shall be the name of the serializer field. In this example we use `media` as field name.

```

class CatalogListApp(CatalogListCMSApp):
    def get_urls(self, page=None, language=None, **kwargs):
        ...

    return [
        ...
        url(r'^$', ProductListView.as_view(
            filter_backends=...,
            serializer_class=CustomizedProductSerializer,
        )),
    ]

```

By specifying an alternative product summary serializer, we can create a more specialized representation of our product models.

A nice aspect of this is, that we can create one apphook per product model. This can be useful, if we want to render a different kind of catalog list per product type. Say, our shop offers two product models, `Book` and `Magazine` and both of these models have their own list serializers. Then by restricting our `ProductListView` to one product model using its customized serializer, we can build two different list views, one for books and one for magazines. If we want to restrict our list view to magazines only, we simply pass `limit_choices_to = Q(instance_of=Book)` to the above `as_view()`-method.

4.6.2 Catalog Detail View

The apphook `CatalogListApp` as show above, is also responsible for routing to the product's detail view. This is why our product declares a `SlugField`. The product's slug then is appended to the URL of the CMS page, also referred as category. This approach generates nicely spelled URLs.

A product detail view is rendered by the `shop.views.catalog.ProductRetrieveView` and is *not* managed by **django-CMS**. Instead, this product detail view behaves like a normal Django view, with its own context objects and rendered by a specific template. This is because we often have thousands of different products and creating one CMS page for each of them, would be a far bigger effort, rather than handcrafting a specific template for each product type.

When rendering a product's detail page, the `ProductRetrieveView` looks for a template suitable for the given product type, following these rules:

- look for a template named `app_label>/catalog/product-model-name-detail.html`⁴⁵, otherwise
- look for a template named `app_label/catalog/product-detail.html`⁴, otherwise
- use the template `samp:shop/catalog/product-detail.html`.

This means that the template to render the products's detail view is selected automatically by the `shop.views.catalog.ProductRetrieveView`. When rendered as HTML, this view adds the product model to the context, so that the rendering templates can refer to this context variable.

Use CMS Placeholders in the Detail View

Sometime we want to add any kind of **django-CMS** plugins to our product's detail pages. To achieve this, we need to add a **django-CMS Placeholder field** named `placeholder`, to the class implementing our product model. Then we add the templatetag `{% render_placeholder product.placeholder %}` to the template implementing the detail view of that product. Now this placeholder can be used to add any arbitrary content to the product's detail

⁴ `app_label` is the app label of the project in lowercase.

⁵ `product-model-name` is the class name of the product model in lowercase.

page. This for instance can be a CMS plugin to add text paragraphs, additional images, a carousel, a video, or whatever else is available from the **django-CMS** plugin system.

Note: The built-in product model `shop.models.defaults.commodity.Commodity` makes heavy use of that placeholder field. The commodity model actually doesn't offer any other fields, other than the product's code, its name and price. So all relevant information must be added to the product's detail view using the **django-CMS** structure editor.

Customizing the Product Detail Serializer

If we need additional business logic regarding our product, we can create a customized serializer class, named for instance `CustomizedProductDetailSerializer`. This class then may access the various attributes of our product model, recombine them and/or merge them into a serializable representation, as described in *Customizing the Product Summary Serializer*.

Additionally, we have to rewrite the apphook from above as:

```
class CatalogListApp(CatalogListCMSApp):
    def get_urls(self, page=None, language=None, **kwargs):
        ...

        return [
            ...
            url(r'^$', ProductRetrieveView.as_view(
                serializer_class=CustomProductDetailSerializer,
            )),
        ]
```

4.6.3 Add Product to Cart

By looking at the URL routings above, the savvy reader may have noticed, that for each product's detail view, there is an extra endpoint ending in `.../add-to-cart`. Its URL points onto the class `shop.views.catalog.AddToCartView`. This view handles the communication between the control form for adding the given product to the cart on the client, and the REST endpoints on the server.

Each product's detail page shall implement a HTML element containing the AngularJS directive `shop-add-to-cart`. This directive fetches the availability, price and cart status, and fills out the "add to cart" form. If the customer submits that form data, the item is added either to the cart, or the watch-list.

To help integration, **django-SHOP** offers a HTML snippet for this purpose. It can be included as `shop/templates/shop/catalog/product-add2cart.html` or, if we must handle the current availability `shop/templates/shop/catalog/available-product-add2cart.html`. It's up to the merchant to use and extend these templates to fit the representation for his own products.

For products with a **django-CMS** placeholder field, the merchant can also use the plugin named "*Add Product to Cart*". This plugin then shall be added into the structure of the product's detail page. Products of type "Commodity" make use of this plugin.

Products with variations

In some situations, it might be necessary to use a custom endpoint for adding a product to the cart. This for instance is required, when the product to be added contains variations. We then rewrite our `CatalogListApp` to use this url pattern:

```

class CatalogListApp(CatalogListCMSApp):
    def get_urls(self, page=None, language=None, **kwargs):
        ...
        return [
            ...
            url(r'^(?P<slug>[\w-]+)/add-product-to-cart', AddToCartView.as_view(
                serializer_class=AddProductWithVariationsSerializer,
            )),
            ...
        ]

```

We then create a special serializer for that view:

```

from shop.models.cart import CartModel
from shop.serializers.defaults.catalog import AddToCartSerializer

class AddProductWithVariationsSerializer(AddToCartSerializer):
    def get_instance(self, context, data, extra_args):
        product = context['product']
        cart = CartModel.objects.get_from_request(context['request'])
        variant = product.get_product_variant(product_code=data['product_code'])
        is_in_cart = bool(product.is_in_cart(cart, product_code=variant.product_code))
        instance = {
            'product': product.id,
            'product_code': variant.product_code,
            'unit_price': variant.unit_price,
            'is_in_cart': is_in_cart,
        }
        return instance

```

This serializer is adopted to a product with variations. Each variation of the product provides its own product code and a price. Additionally we want to know, whether the same variation of that product is already in the cart (increasing the quantity), or if it has to be considered as different product (adding a new one to the cart). For indicating this state, the serializer returns a flag, named `is_in_cart`.

4.6.4 Admin Integration

To simplify the declaration of the admin backend used to manage our Product model, **django-SHOP** is shipped with a special mixin class, which shall be added to the product's admin class:

```

from django.contrib import admin
from shop.admin.product import CMSPageAsCategoryMixin
from myshop.models import Product

@admin.register(Product)
class ProductAdmin(CMSPageAsCategoryMixin, admin.ModelAdmin):
    fields = [
        'product_name', 'slug', 'product_code',
        'unit_price', 'active', 'description',
        # other model fields
    ]
    # other admin declarations

```

This then adds a horizontal filter widget to the product models. Here the merchant must select each CMS page, where the currently edited product shall appear on.

If caching is configured and enabled, HTML snippets rendered by the method `render_html()` are cached by **django-SHOP**. Caching these snippets is highly recommended and gives a noticeable performance boost, specially while rendering catalog list views.

Since we would have to wait until they expire naturally by reaching their expire time, **django-SHOP** offers the mixin class `shop.admin.product.InvalidateProductCacheMixin`. This should be added to the `ProductAdmin` class. It then expires all HTML snippets of a product, whenever a product is saved by the backend.

Note: Due to the way keys are handled in many caching systems, the `InvalidateProductCacheMixin` only makes sense if used in combination with the `redis_cache` backend.

4.7 Full Text Search

How should a customer find the product he desires in a more or less unstructured collection of countless products? Hierarchical navigation often doesn't work and takes too much time. Thanks to the way we use the Internet today, most site visitors expect one central search field inside, or nearby the main navigation bar of a site.

4.7.1 Search Engine API

While it is possible to adopt other search backends to **django-SHOP** with little effort, this documentation focuses exclusively on `Elasticsearch`.

Until version 1.1, **django-SHOP** used `Haystack`. Haystack is a great third party app for Django and easy to adapt for full-text search. Unfortunately, Haystack was never adopted to versions of Elasticsearch beyond 1.7. Also, it didn't allow complicated queries and the configuration is minimal and highly restricted. Therefore, **django-SHOP** version 1.2 has been refactored to use `elasticsearch-dsl` together with `django-elasticsearch-dsl`. It now supports up to the most recent version of Elasticsearch, which currently is 7.6.

In this document we assume that the merchant only wants to index his products, but not any arbitrary content, such as for example the "Terms and Conditions" page, as found outside **django-SHOP**, but usually inside **django-CMS**. Indexing CMS pages using Elasticsearch would be perfectly feasible, but is not the topic of this documentation.

Configuration

Download and install the latest version of the Elasticsearch binary. During development, all tests have been performed with version 7.5. After unzipping the file, start Elasticsearch in daemon mode by invoking:

```
./path/to/elasticsearch-version/bin/elasticsearch -d.
```

Check if the server answers on HTTP requests. Pointing a browser on `http://localhost:9200/` should return something similar to this:

```
$ curl http://localhost:9200/
{
  "name" : "Ape-X",
  "cluster_name" : "elasticsearch",
  "cluster_uuid" : "P9HVZRPbUXjTEDO9iZHGDk",
  "version" : {
    ...
  }
}
```

Install `elasticsearch-dsl` and `django-elasticsearch-dsl` using


```
pipenv install django-elasticsearch-dsl
```

In `settings.py`, add `'django_elasticsearch_dsl'` to the list of `INSTALLED_APPS`. Configure the connection to the Elasticsearch database:

```
ELASTICSEARCH_DSL = {
    'default': {
        'hosts': 'localhost:9200',
    },
}
```

4.7.2 Indexing the Products

Before adding search support for products on our site, we must consider which fields of our product model contain relevant information to be searched for. The philosophy of **django-SHOP** is to not impose any predefined fields for this purpose, but rather let the merchants decide what they need. Therefore it is quite important to spot the fields in the product models, which contain the relevant information customers might search for.

Elasticsearch uses the term `Document` to describe a searchable entity. In **django-SHOP**, we can define one or more product models, each declaring their own fields. Since in our e-commerce site, we want to search over all products, regardless of their specific model definition, we need a mapping from those fields onto the representation used to create the reverse index. For this purpose, **django-SHOP** is shipped with a generic document class named `ProductDocument`. It contains three index fields: `product_name`, `product_code` and `body`.

Product Name

The product's name often is declared as a `CharField` in our product's model. Depending on the nature of the product, it could also be declared for different languages. Using `django-parler's TranslatableField`, the product name then is stored in a Django model related to the product model. We also want to ensure, that this name is indexed only for a specific language.

This information is stored inside the `Document` field: `product_name`.

Product Code

The product's code is the unique identifier of a product and is independent of the language. However, in case a product is offered in different variants, each of them may declare their own product code. This means, that the same product can be found through one or more product codes. Moreover, since product code are unique identifiers, we usually do not want to apply stemming.

They are stored as a list of keywords inside an Elasticsearch `Document` entity.

Body Field

Depending on our product's model declaration, we can have many additional fields containing information, which may be relevant for search. Therefore the merchant must declare a Django template for each product type. This template then is used to render the content of those fields as plain text. This text is never seen by humans, but rather is used to feed our full text search engine when building the reverse index. First Elasticsearch strips all HTML tags from that text. In the second step, this text is tokenized and stemmed by Elasticsearch analyzers. In **django-SHOP** we shall specify one analyzer for each natural language.

Example

Say, we have a product using this simplified model representation:

```
from django.db import models
from shop.models.product import BaseProduct

class Author(models.Model):
    name = models.CharField(
        "Author Name",
        max_length=255,
    )

class Editor(models.Model):
    name = models.CharField(
        "Editor",
        max_length=255,
    )

class Book(BaseProduct):
    product_name = models.CharField(
        "Book Title",
        max_length=255,
    )

    product_code = models.CharField(
        "Product code",
        max_length=255,
    )

    caption = HTMLField(
        help_text="Short description",
    )

    authors = models.ManyToManyField(Author)

    editor = models.ForeignKey(
        Editor,
        on_delete=models.CASCADE,
    )
```

By default, **django-SHOP**'s search functionality indexes only the fields `product_name` and `product_code`. Usually we also want other fields being indexed, if they contain relevant information. If say, the merchant's implementation is named `awesome_bookstore`, then inside the project's template folder, we must create a file named `awesome_bookstore/search/indexes/book.txt`. This template file then shall contain a structure similar to this:

Listing 7: `awesome_bookstore/search/indexes/book.txt`

```
{{ product.caption }}
{% for author in product.authors.all %}
{{ author.name }}{% endfor %}
{{ product.editor.name }}
```

When building the index, this template is rendered for each product offered by our bookstore. The rendered content is passed directly to the search engine and serves to feed the Elasticsearch database with a reverse index. Before importing, it is cleaned up, removing all HTML tags. Afterwards it is tokenized into a list of separate words. These words then are stemmed, which means that they are reduced to their basic meaning. The final step is to remove

common words, such as “or”, “the”, “is”, “and” etc. This list of words is named “The Reverse Index” and is then stored in the `body` field inside entities of type `shop.search.documents.ProductDocument`.

Note: If the above template file can not be found, **django-SHOP** falls back onto `awesome_bookstore/search/indexes/product.txt`. If that template file is missing too, then the file `shop/search/indexes/product.txt` is used. Note that the template file always is in lowercase.

Populate the Database

To build the index in Elasticsearch, invoke `./manage.py search_index --rebuild`. If German and English are configured, then the output may look like:

```
$ ./manage.py search_index --rebuild
Deleting index 'awesome_bookstore.de.products'
Deleting index 'awesome_bookstore.en.products'
Creating index 'awesome_bookstore.de.products'
Creating index 'awesome_bookstore.en.products'
Indexing 986 'Product' objects
Indexing 986 'Product' objects
```

Depending on the number of products in the database, this may take some time. Note, that only products tagged as “active” are indexed. To check, if the product can be found in the index, point a browser onto:

http://localhost:9200/awesome_bookstore.en.products/_search?q=django&pretty.

If our awesome bookstore offers books whose title or caption text contains the word “Django”, then these books are listed as “hits” in the JSON response from Elasticsearch.

4.7.3 Search View

In order to show search results, we need a database filled with a reverse index. This is what we have done in the previous section. This populated search database can be used for two kind of purposes:

Generic search over all products and as an additional “search-as-you-type” filter, while rendering the catalog’s list view.

Search Apphook

As with all other pages in **django-SHOP**, the page displaying our search results is a normal CMS page too. It is suggested to create this page on the root level of the page tree. As title for this page we choose “*Search Results*” or something similar meaningful. Since we want to hide this page from the menu navigation, we must disable its Menu visibility using the appropriate checkbox in the CMS page tree admin.

We now change into the *Advanced Setting* of the page. There we set the page **ID** to “shop-search-product”. This identifier is required, so that the search functionality knows where to render the search results. As **Application**, we select *Catalog Search* from the drop-down menu. This selects the **django-CMS apphook** provided by **django-SHOP** for its catalog search.

Note: The apphook *Catalog Search* must be registered by the merchant implementation. It’s just as simple as registering `shop.cms_apphooks.CatalogSearchApp` using the `menus.menu_pool.menu_pool.apphook_pool.register()`.



As a template use one with a placeholder large enough to render the search results. The default template shipped with **django-SHOP** usually is a good fit.

Now save the page and change into **Structure** mode. There locate the placeholder named **Main Content** and add a Bootstrap Container plugin, followed by a Row and then a Column plugin. As leaf child of that column, choose the **Search Results** plugin from section **Shop**. This CMS plugin offers three pagination options:

- **Manual Paginator:** If searching generates too many results, add a paginator on the bottom of the page. The customer may scroll through those pages manually.
- **Manual Infinite:** If searching generates too many results, add a button on the bottom of the page. The customer load more results clicking on that button.
- **Auto Infinite:** If searching generates too many results, and the customer scrolls to the bottom of the page, more results are loaded automatically.

As with all other placeholders in **django-CMS**, you may add as many plugins together with the **Search Results** plugin. Finally publish the page and enter some text into the search field. This should render a list of found products.

HOME / Search

2 matching products found		Base Price
	Micro SDHC 64GB Built to stand up to hours of Full HD1 video recording, the SanDisk High Endurance Video Monitoring microSDHC and microSDXC Memory Cards provide the capacity, performance and exceptional reliability today's home security and dash cams demand. They're also protected against extreme temperatures, shock, water and x-rays2, so you can be confident the evidence is there when you need it. SanDisk High Endurance Video Monitoring Cards are available in capacities of 32GB and 64GB.	€ 12.89 Details >
	Micro SDHC 32GB Built to stand up to hours of Full HD1 video recording, the SanDisk High Endurance Video Monitoring microSDHC and microSDXC Memory Cards provide the capacity, performance and exceptional reliability today's home security and dash cams demand. They're also protected against extreme temperatures, shock, water and x-rays2, so you can be confident the evidence is there when you need it. SanDisk High Endurance Video Monitoring Cards are available in capacities of 32GB and 64GB.	€ 8.39 Details >

Adopting the Templates

Search results are displayed using a wrapper template responsible for rendering a list of found items. The default template can be found in `shop/templates/shop/search/results.html`. It can be replaced or extended by a customized template in the merchant implementation, namely `app_label/templates/app_label/`

search/results.html¹. In our bookstore example this template would be named awesome_bookstore/templates/awesome_bookstore/search/results.html.

Since each of the found items may be from a different product type, we can provide a snippet template for each of them. This allows us to display the given list in a polymorphic way, so that each product type can provide its own way how to be rendered. That snippet template is looked up following these rules:

- `app_label/templates/app_label/products/search-product-model-name-media.html1,2`
- `app_label/templates/app_label/products/search-product-media.html1`
- `shop/templates/shop/products/search-product-media.html`

This means that the template to render the products's detail view is selected automatically depending on its product type.

Autocompletion in Catalog List View

As we have seen in the previous example, the Product Search View is suitable to search for any item in the product database. Sometimes the site visitor might just refine the list of items shown in the catalog's list view. Here, loading a new page which uses a layout able to render every kind of product usually differs from the catalog's list layout, and hence may be inappropriate.

Instead, when someone enters some text into the search field, **django-SHOP** starts to narrow down the list of items in the default catalog's list view by typing query terms into the search field. This is specially useful in situations where hundreds of products are displayed together on the same page and the customer want to pick out the correct one by entering some search terms.

To extend the existing Catalog List View for autocompletion, locate the file `cms_apps.py` in the merchant implementation. There we add a special search filter to our existing product list view. This could be implemented as:

Listing 8: awesome_bookstore/cms_apps.py

```
from cms.apphook_pool import apphook_pool
from shop.cms_apphooks import CatalogListCMSApp
from shop.rest.filters import CMSPagesFilterBackend

class CatalogListApp(CatalogListCMSApp):
    def get_urls(self, page=None, language=None, **kwargs):
        from shop.search.mixins import ProductSearchViewMixin
        from shop.views.catalog import AddToCartView, ProductListView, ProductRetrieveView
        ↪ProductRetrieveView

        bases = (ProductSearchViewMixin, ProductListView)
        ProductSearchListView = type('SearchView', bases, {})
        filter_backends = [CMSPagesFilterBackend]
        filter_backends.extend(api_settings.DEFAULT_FILTER_BACKENDS)
        return [
            url(r'^(?P<slug>[\w-]+)/add-to-cart', AddToCartView.as_view()),
            url(r'^(?P<slug>[\w-]+)/', ProductRetrieveView.as_view()),
            url(r'^', ProductSearchListView.as_view(
                filter_backends=filter_backends,
            )),
        ]
```

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¹ `app_label` is the app label of the project in lowercase.

² `product-model-name` is the class name of the product model in lowercase.

(continued from previous page)

```
apphook_pool.register(CatalogListApp)
```

In this apphook, we create the class `ProductSearchListView` on the fly. It actually just adds the mixin `shop.search.mixins.ProductSearchViewMixin` to the existing *Catalog List View*. This class extends the internal filters by one, which also consults the Elasticsearch database if we filter the product against a given query request.

4.7.4 The Client Side

To facilitate the placement of the search input field, **django-SHOP** ships with the reusable AngularJS directive named `shopProductSearch`. It is declared inside the module `shop/js/search-form.js`.

A HTML snippet with a submission form using this directive can be found in the shop's templates folder at `shop/navbar/search-form.html`. If you override it, make sure that the `<form...>` tag uses the directive `shop-product-search` as attribute:

```
<form shop-product-search method="get" action="/url-of-page-rendering-the-search-  
→results">  
  <input name="q" ng-model="searchQuery" ng-change="autocomplete()" type="text" />  
</form>
```

If you don't use the prepared HTML snippet, assure that the module is initialized while bootstrapping our Angular application:

```
angular.module('myShop', [..., 'django.shop.search', ...]);
```

4.8 Filter Products by its Attributes

Besides *Full Text Search*, adding a filtering functionality to an e-commerce site is another very important feature. Customers must be able to narrow down a huge list of available products to a small set of desired products using a combination of prepared filter attributes.

In **django-SHOP**, we model each product according to its own properties, the color for instance. The customer then might filter the listed products, selecting one or more of the given properties, the color "blue" for instance.

Therefore, when creating a database schema, we add that property to our product model. This can either be a hard coded list of enumerated choices, or if we need a more flexible approach, a foreign key onto another model referring to that specific property. If our product model allows more than one attribute of the same property, then we would use a many-to-many-key in our database.

The contents of this additional property model (or hard coded property list), then is used to create a set of available filtering options, from which the customer can select one (if allowed, also more) options to narrow down the list of products with that specific attributes.

Fortunately, the REST framework in combination with *Django Filter*, makes it a rather simple task to implement this kind of filtering functionality on top of the existing product models.

4.8.1 Adding a Filter to the List View

In **django-SHOP** showing a list of products, normally is controlled by the classes `shop.views.catalog.ProductListView` or `shop.views.catalog.CMSPageProductListView`. By default these View classes

are configured to use the default filter backends as provided by the REST framework. These filter backends can be configured globally through the settings variable `DEFAULT_FILTER_BACKENDS`.

Additionally we can subclass the filter backends for each View class in our `urls.py`. Say, we need a special catalog filter, which groups our products by a certain product attribute. Then we can create a customized filter backend

Listing 9: filters.py

```
from rest_framework.filters import BaseFilterBackend

class CatalogFilterBackend(BaseFilterBackend):
    def filter_queryset(self, request, queryset, view):
        queryset = queryset.order_by('attribute__sortmetric')
        return queryset
```

In `urls.py`, where we route requests to the class `shop.views.catalog.ProductListView`, we then replace the default filter backends by our own implementation:

Listing 10: myshop/urls/catalog.py

```
from django.conf.urls import url
from rest_framework.settings import api_settings
from shop.views.catalog import ProductListView

urlpatterns = [
    url(r'^$', ProductListView.as_view(
        filter_backends=[CatalogFilterBackend],
    ),
]
]
```

The above example is very simple but gives a rough impression on its possibilities.

Working with Django-Filter

Django Filter is a generic, reusable application to alleviate writing some of the more mundane bits of view code. Specifically, it allows users to filter down a queryset based on a model's fields, displaying the form to let them do this.

REST framework also includes support for [generic filtering backends](#) that allow you to easily construct complex searches and filters.

By creating a class which inherits from `django_filters.FilterSet`, we can build filters against each attribute of our product. This filter then uses the passed in query parameters to restrict the set of products available from our current catalog view. Presume that our product model uses a foreign key onto a model holding all manufactures. We then can create a simple filter class to restrict our list view onto a certain manufacturer:

Listing 11: myshop/filters.py

```
from django.forms import forms, widgets
import django_filters
from djng.forms import NgModelFormMixin
from myshop.models.product import MyProduct, Manufacturer

class FilterForm(NgModelFormMixin, forms.Form):
    scope_prefix = 'filters'

class ProductFilter(django_filters.FilterSet):
    manufacturer = django_filters.ModelChoiceFilter(
```

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```

        queryset=Manufacturer.objects.all(),
        widget=Select(attrs={'ng-change': 'filterChanged()'}),
        empty_label="Any Manufacturer")

class Meta:
    model = MyProduct
    form = FilterForm
    fields = ['manufacturer']

@classmethod
def get_render_context(cls, request, queryset):
    """
    Prepare the context for rendering the filter.
    """
    filter_set = cls()
    # we only want to show manufacturers for products available in the current_
↪list view
    filter_field = filter_set.filters['manufacturer'].field
    filter_field.queryset = filter_field.queryset.filter(
        id__in=queryset.values_list('manufacturer_id'))
    return dict(filter_set=filter_set)

```

To this filter class we can combine as many fields as we need, but in this example, we just use the foreign key to the manufacturer model. For all available filter field types, please check the appropriate documentation in [Django Filter](#).

We then can add this filter class to our product list view. In **django-SHOP** this normally is done through the url patterns:

Listing 12: myshop/urls.py

```

urlpatterns = [
    url(r'^$', ProductListView.as_view(
        filter_class=ProductFilter,
    )),
    # other patterns
]

```

By appending `?manufacturer=7` to the URL, the above filter class will restrict the products in our list view to those manufactured by the database entry with a primary key of 7.

Populate the Render Context

Filtering functionality without an appropriate user interface doesn't make much sense. Therefore, when rendering the product's list view, we might want to add some input fields or special links, so that the customer can narrow down the result set. To do this, the rendering template requires additional context data.

Since **django-SHOP** honours the principle of cohesion, each filter set is responsible for providing the context required to render its specific filtering parameters. This extra context must be provided by a class-method named `get_render_context(request, queryset)`, which must return a dictionary containing an instance of that filter set.

While rendering HTML pages, this extra context then can be used to render various tag filtering elements, such as a `<select>`-box. Since our `ProductFilter` can be rendered as form fields, we just have to use this Django template:


```
{{ filter.filter_set.form }}
```

The Client Side

If your site uses the provided AngularJS directive `<shop-list-products>`, we typically want to use that as well, when the customer applies a product filter. Therefore this directive listens on events named `shop.catalog.filter` and queries the backend with the given properties. This allows us to add a set of filter options to the product's list view, without having to care about how to fetch that filtered list from the server.

Since we don't even want to care about controlling change events on the filtering `<select>` box, **django-SHOP** is shipped with a reusable directive named `shop.product.filter`.

Sample HTML snippet:

```
<div shop-product-filter="manufacturer">
  {{ filter.filter_set.form }}
</div>
```

or if your filter set forms uses more than one attribute:

```
<div shop-product-filter="['manufacturer', 'brand']">
  {{ filter.filter_set.form }}
</div>
```

The Angular directive `shop.product.filter` is declared inside the shop's `shop/js/filters.js` module, so make sure to include that file. Additionally, that module must be initialized while bootstrapping our Angular application:

```
angular.module('myShop', [..., 'django.shop.filter', ...]);
```

Each time the customer selects another manufacturer, the function `filterChanged` emits an event intercepted by the AngularJS directive `shopListProducts`, which consequently fetches a list of products using the filtering class as shown above.

Apart from forwarding changes detected in our `<select>` box, this directive also modifies the URL and appends the selected properties. This is required, whenever the user navigates away from the product's list view and returns back, so that the same filters are applied. Additionally the directive clears the search query field, because full text search in combination with property filtering is confusing and doesn't make sense.

4.9 Cascade Plugins

Django-SHOP extends the used eco-system around **django-CMS** plugins, [djangocms-cascade](#), by additional shop-specific plugins. This allows us to create a whole shopping site, which consists of many different elements, without having to craft templates by hand – with one exception: The product detail views.

Therefore all we have to focus on, is a default page template with one big placeholder. This placeholder then is subdivided into containers, rows, columns and other elements of the **Cascade** plugin collection.

This however requires a completely different approach, from a designer's point of view. The way web design has been done a few years ago, starting with the screenshot of a finished page, must be rethought. This has been discussed in length by many web-designers, especially by Brad Frost in his excellent book on [Atomic Web Design](#). He propagates to reverse the design process and start with the smallest entity, which he calls Atoms. They form to bigger components, named Molecules, which themselves aggregate to Organisms.

Some designers nowadays build those components directly in HTML and CSS or SASS, instead of drawing their screens using programs such as InDesign or PhotoShop (which by the way never was intended for this kind of work). It also exempts having the programmer to convert those screens into HTML and CSS – a time consuming and unsatisfying job.

According to Frost, the next bigger component after the Organism is the template. This is where **djangoCMS-cascade** jumps in. Each of the Cascade plugins is shipped with its own default template, which can easily be overwritten by the designers own implementation.

4.9.1 Overriding Templates

For all plugins described here, we can override the provided templates with our own implementation. If the shop framework provides a template, named `/shop/folder/my-organism.html`, then we may override it using `/merchantimplementaion/folder/my-organism.html`.

This template then usually extends the existing framework template with

```
{% extends "/shop/folder/my-organism.html" %}

{% block shop-some-identifier %}
    <div>...</div>
{% endblock %}
```

This is in contrast to Django's own implementation for searching the template, but allows to extend exiting templates more easily.

4.9.2 Breadcrumb

The **BreadcrumbPlugin** has four different rendering options: *Default*, *Soft-Root*, *With Catalog Count* and *Empty*. It can be added exclusively to the placeholder named **Breadcrumb**, unless otherwise configured.

The *Default* breadcrumb behaves as expected. *Soft-Root* appends the page title to the existing breadcrumb, it shall be used for pages marked as soft root. A breadcrumb of type *With Catalog Count* adds a badge containing the number of items. Use an *Empty* to hide the breadcrumb otherwise displayed by the placeholder as default.

4.9.3 Cart

The **CartPlugin** has four different rendering options: Editable, Static, Summary and Watch-List. Refer to the [Cart using a Cascade Plugin](#) for details.

4.9.4 Checkout Forms

All Forms added to the checkout page are managed by members of the Cascade plugin system. All these plugin inherit from a common base class, `shop.cascade.plugin_base.DialogFormPluginBase`. They all have in common to render and validate one specific Form, which itself inherits from `shop.forms.DialogForm` or `shop.forms.DialogModelForm`.

A nice aspect of this approach is, that ...

- if we add, change or delete attributes in a form, fields are added, changed or deleted from the rendered HTML as well.
- we get client side form validation for free, without having to write any Javascript nor HTML.

- if we add, change or delete attributes in a form, this modification propagates down to both form validation controllers: That one in Javascript used on the client as well as the final one, validating the form on the server.
- if our forms are made out of models, all of the above works as well.
- we can arrange each of those form components using the **Structure** editor from **django-CMS** toolbar. This is much faster, than by crafting templates manually.

As we can see from this approach, **django-SHOP** places great value on the principles of a [Single Source of Truth](#), when working with customized database models and forms.

Many of these Forms can be rendered using two different approaches:

Form dialog

Here we render all model fields as input fields and group them into an editable form. This is the normal use case.

Static summary

Here we render all model fields as static strings without wrapping it into a form. This shall be used to summarize all inputs, preferably on the last process step.

These are the currently available plugins provided by **django-SHOP** to build the checkout page:

Customer Form Plugin

The **Customer Form** is used to query information about some personal information, such as the salutation, the first- and last names, its email address etc. In simple terms, this form combines the fields from the model classes `shop.models.customer.Customer` and `email_auth.models.User` or `auth.models.User` respectively. This means that fields, we add to our `Customer` model, are reflected automatically into this form.

Guest Form Plugin

The **Guest Form** is a reduced version of the **Customer Form**. It only asks for the email address, but nothing else. We use it for customers which do not want to create an account.

Shipping- and Billing Address Forms

There are two form plugins, where customers can add their shipping and/or billing address. The billing address offers a checkbox allowing to reuse the shipping address. By overriding the form templates, this behavior can be switched. Both plugins provide a form made up from the model class implementing `shop.models.address.AddressModel`.

Select the Payment Provider

For each payment provider registered within **django-SHOP**, this plugin creates a list of radio buttons, where customers can choose their desired payment provider. By overriding the rendering templates, additional forms, for instance to add credit card data, can be added.

Select a Shipping Method

For each shipping provider registered within **django-SHOP**, this plugin creates a list of radio buttons, where customers can choose their desired shipping method.

Extra Annotations Plugin

This plugin provides a form, where customers can enter an extra annotation, while they proceed through the checkout process.

Accept Condition Plugin

Normally customers must click onto a checkbox to accept various legal requirements, such as the terms and conditions of this site. This plugin offers a text editor, where the merchant can enter a paragraph, possibly with a link onto another CMS page explaining them in more details.

Required Form Fields Plugin

Most checkout forms have one or more required fields. To labels of required input fields, an asterisk is appended. This plugin can be used to add a short text message stating “* These fields are required”. It normally should be placed between the last checkout form and the proceed button.

Proceed Button

This plugin adds a styleable proceed button to any placeholder. This kind of button differs from a clickable link button in that sense, that it first sends all gathered form data to the server and awaits a response. Only if all forms are successfully validated, this button proceeds to the given link.

This proceed button can also handle two non-link targets: “Reload Page” and “Purchase Now”.

The first target is useful to reload the page in a changed context, for instance if a site visitor logged in and now shall get a personalized page.

The second target is special to **django-SHOP** and exclusively used, when the customer performs *The Purchasing Operation*.

4.9.5 Authentication

Before proceeding with various input forms, we must know the authentication status of our site visitors. These different states are explained here in detail: *Anonymous Users and Visiting Customers*.

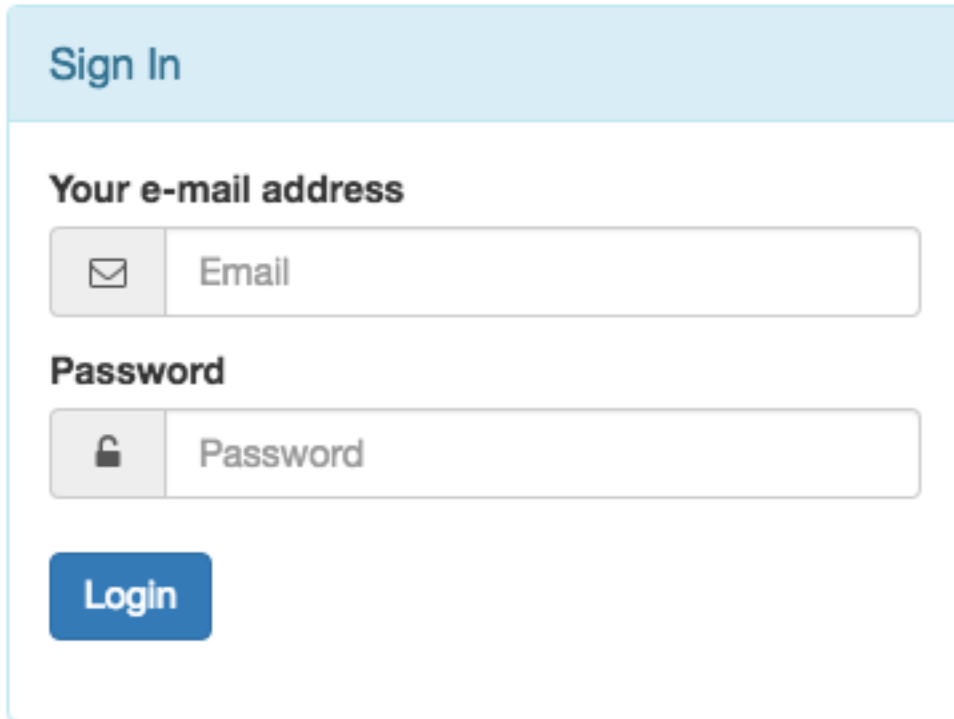
Therefore we need pluggable forms, where visitors can sign in and out, change and reset passwords and so on. All this authentication forms are handled by one single plugin

Authentication Plugin

This plugin handles a bunch of authentication related forms. Lets list them:

Login Form

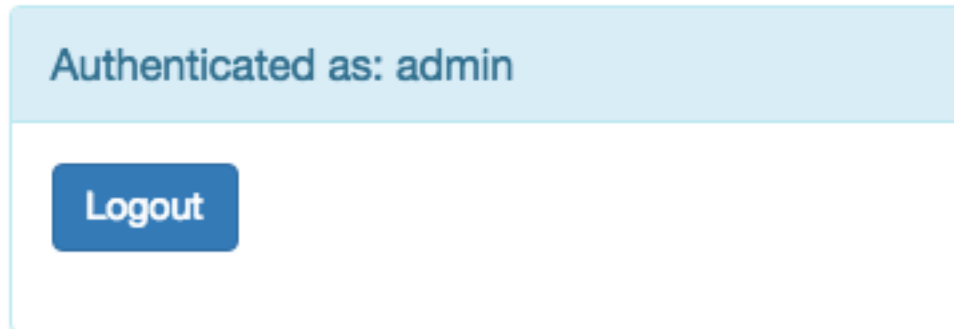
This is a simple login form accepting a username and password.

A login form with a light blue header bar containing the text "Sign In". Below the header, there are two input fields. The first is labeled "Your e-mail address" and contains an email icon and the placeholder text "Email". The second is labeled "Password" and contains a lock icon and the placeholder text "Password". Below these fields is a blue button with the text "Login".

This form normally is used in combination with **Link type:** *CMS Page*.

Logout Form

This logout form just adds a button to sign out from the site.

A logout form with a light blue header bar containing the text "Authenticated as: admin". Below the header is a blue button with the text "Logout".

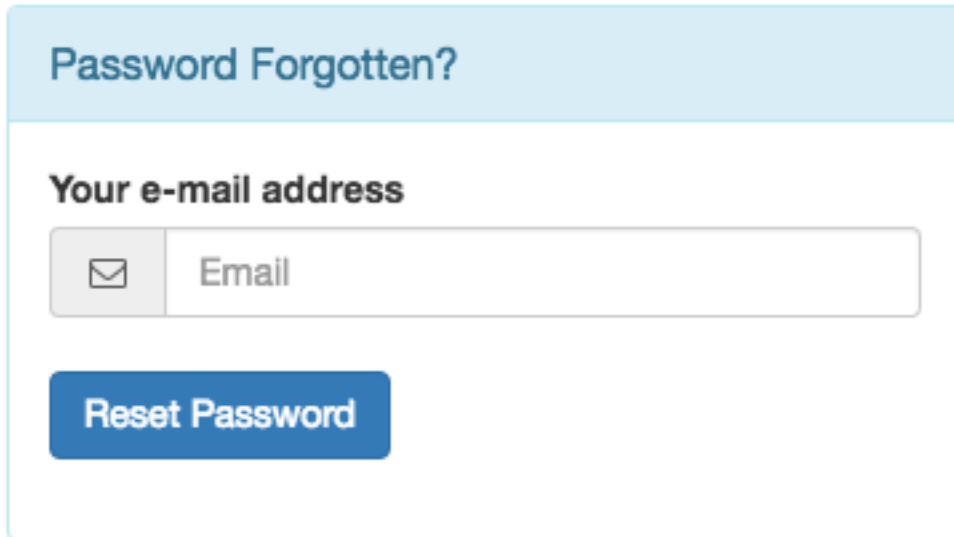
This form normally is used in combination with **Link type:** *CMS Page*.

Shared Login/Logout Form

This combines the *Login Form* with the *Logout Form* so, that anonymous visitors see the login form, while logged in users see the logout form. This form normally is used in combination with **Link type:** *Reload Page*.

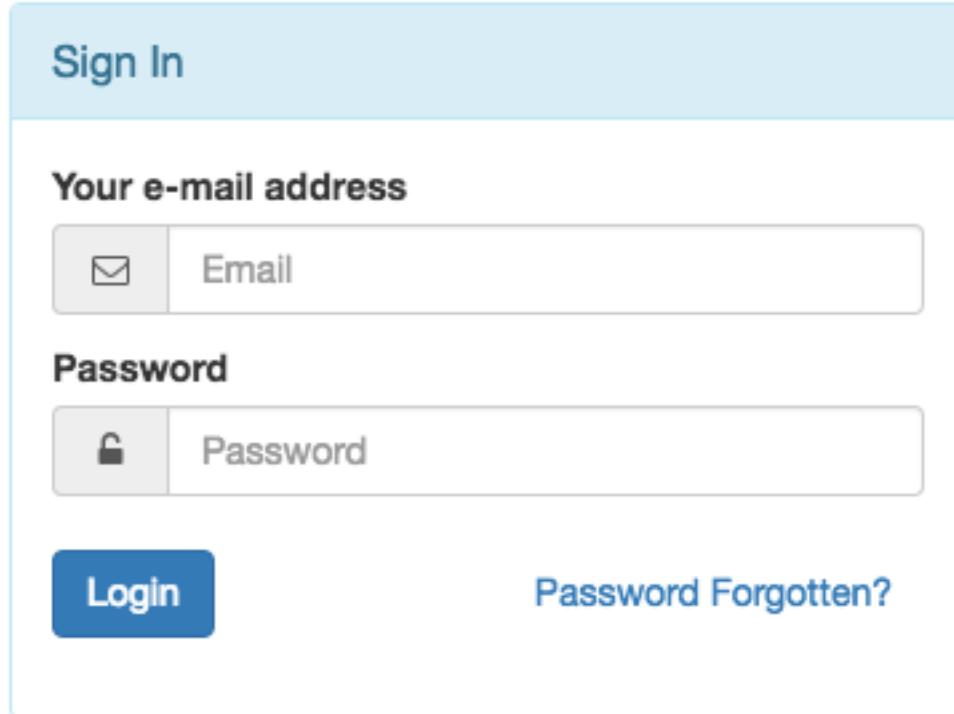
Password Reset Form

This form offers a field, so that registered users, which forgot their password, can enter their email address to start a password reset procedure.

The form is titled "Password Forgotten?" in a light blue header. Below the header, the label "Your e-mail address" is displayed. Underneath is a text input field with a light gray icon of an envelope on the left and the placeholder text "Email". Below the input field is a blue button with the text "Reset Password" in white.

Login & Reset Form


This extends the *Shared Login/Logout Form* by combining it with the *Password Reset Form* form.

The form is titled "Sign In" in a light blue header. Below the header, the label "Your e-mail address" is displayed. Underneath is a text input field with a light gray icon of an envelope on the left and the placeholder text "Email". Below this is the label "Password". Underneath is another text input field with a light gray icon of a padlock on the left and the placeholder text "Password". At the bottom left is a blue button with the text "Login" in white. At the bottom right is a blue link with the text "Password Forgotten?".


If someone clicks on the link **Password Forgotten?** the form extends to

Sign In

Your e-mail address

 Email


Password

 Password

Login

[Password Forgotten?](#)

Your e-mail address

 Email

Reset Password


This form normally is used in combination with **Link type:** *Reload Page*.

Change Password Form


This form offers two field to change the password. It only appears for logged in users.

Change Password

New Password

New Password

Confirm Password

Confirm Password


Submit Changes

Register User Form

Using this form, anonymous visitors can register themselves. After having entered their email address and their desired passwords, they become registered users.


Register Yourself

Your e-mail address




☐ Preset password
Send a randomly generated password to your e-mail address.

Choose a password



Minimum length is 6 characters.



Confirm password.

Register

This form normally is used in combination with **Link type:** *Reload Page*.

Continue as Guest Form

This form just adds a button, so that visitors can declare themselves as guest users who do not want to register an account, nor expose their identity.

Proceed as guest


Continue as guest

This form normally is used in combination with **Link type**: *Reload Page*.

4.9.6 Process Bar

The **ProcessBarPlugin** can be used to group many forms plugins onto the same page, by dividing them up into different block. Only one block is visible at a time. At top of that page, a progress bar appears which shows the active step.

This plugin checks the validity of all of its forms and allows to proceed to the next step only, if all of them are valid.

<div> <div>1</div> <div>2</div> <div>3</div> </div>			
Quantity	Product	Unit Price	Total
1		€ 239.00	€ 239.00
Subtotal			€ 239.00
19% V.A.T incl.			€ 38.16
Shipping costs			€ 5.00
Total			€ 244.00

Each step in that process bar must contain a **Next Step Button**, so that the customer can move to the next step, provided all forms are valid.

The last step shall contain a *Proceed Button* which shall be configured to take appropriate action, for instance to start the purchasing operation using the **Link type** “*Purchase Now*”.

Note: This plugin requires the AngularJS directive `<bsp-process-bar>` as found in the npm package [angular-bootstrap-plus](#).

4.9.7 Catalog

The catalog list view is handled by the **ShopCatalogPlugin**.

This plugin requires a CMS page, which uses the [apphook **ProductsListApp**](#). First assure that we [Create the CatalogListApp](#). This CMSApp must be implemented by the merchant; it thus is part of the project, rather than the **django-SHOP** framework.

4.9.8 Viewing Orders

The **Order Views** plugin is used to render the list- and detail views of orders, specific to the currently logged in customer. Without a number in the URL, a list of all orders belonging to the current customer is shown. By adding the primary key of a specific order to the URL, all ordered items from that specific order are shown. We name this the order detail view, although it is a list of items.

This plugin requires a CMS page, which as uses the CMSApp **OrderApp**. This CMS application is part of the shop framework and always available in the *Advanced Settings* of each CMS page.

Caveat when editing the Order Detail Page

The Order List- and Detail Pages share one common entity in our CMS page tree. The Order Detail view just rendered in a different way. Editing this pseudo page therefore is not possible because it is not part of the CMS.

4.9.9 Search Results

Rendering search results is handled by the **Search Results** plugin.

On a site offering full-text search, add a page to display search results. First assure that we have a [Search View](#) assigned to that page as [apphook](#). This CMSApp must be implemented by the merchant; it thus is part of the project, rather than the **django-SHOP** framework.

4.10 Cart and Checkout

In **django-SHOP** the cart's content is always stored inside the database. In previous versions of the software, the cart's content was kept inside the session for anonymous users and stored in the database for logged in users. Now the cart is always stored in the database. This approach simplifies the code and saves some random access memory, but adds another minor problem:

From a technical point of view, the checkout page is the same as the cart. They can both be on separate pages, or be merged on the same page. Since what we would normally name the “*Checkout Page*”, is only a collection of [Cascade Plugins](#), we won't go into further detail here.

4.10.1 Expired Carts

Sessions expire, but then the cart's content of anonymous customers still remains in the database. We therefore must assure that these carts will expire too, since they are of no use for anybody, except, maybe for some data-mining experts.

By invoking

```
./manage.py shopcustomers
Customers in this shop: total=3408, anonymous=140, expired=88,
    active=1108, guests=2159, registered=1109, staff=5.
```

we gather some statistics about customers having visited of our **django-SHOP** site. In this example we see that 1109 customers bought as registered users, while 2159 bought as guests. There are 88 customers in the database, but they don't have any associated session anymore, hence they can be considered as expired. Invoking

```
./manage.py shopcustomers --delete-expired
```

deletes those expired customers, and with them their expired carts. This task shall be performed by a cronjob on a daily or weekly basis.

4.10.2 Cart Models

The cart consists of two models classes `Cart` and `CartItem`, both inheriting from `BaseCart` and `BaseCartItem` respectively. As with most models in **django-SHOP**, these are using the *Deferred Model Pattern*, so that inheriting from a base class automatically sets the foreign keys to the appropriate model. This gives the programmer the flexibility to add as many fields to the cart, as the merchant requires for his special implementation.

In most use-cases, the default cart implementation will do the job. These default classes can be found at `shop.models.defaults.cart.Cart` and `shop.models.defaults.cart_item.CartItem`. To materialize the default implementation, it is enough to `import` these two files into the merchants shop project. Otherwise we create our own cart implementation inheriting from `BaseCart` and `BaseCartItem`. Since the item quantity can not always be represented by natural numbers, this field must be added to the `CartItem` implementation rather than its base class. Its field type must allow arithmetic operations, so only `IntegerField`, `FloatField` or `DecimalField` are allowed as quantity.

Note: Assure that the model `CartItem` is imported (and materialized) before model `Product` and classes derived from it.

The `Cart` model uses its own manager. Since there is only one cart per customer, accessing the cart must be performed using the `request` object. We can always access the cart for the current customer by invoking:

```
from shop.models.cart import CartManager

cart = CartModel.objects.get_or_create_from_request(request)
```

Adding a product to the cart, must be performed by invoking:

```
from shop.models.cart import CartItemManager

cart_item = CartItemManager.get_or_create(
    cart=cart, product=product, quantity=quantity, **extras)
```

This returns a new cart item object, if the given product could not be found in the current cart. Otherwise it returns the existing cart item, increasing the quantity by the given value. For products with variations it's not always trivial to determine if they shall be considered as existing cart items, or as new ones. Since **django-SHOP** can't tell that difference for any kind of product, it delegates this question. Therefore the class implementing the shop's products shall override their method `is_in_cart`. This method is used to tell the `CartItemManager` whether a product has already been added to the cart or is new.

Whenever the method `cart.update(request)` is invoked, the cart modifiers run against all items in the cart. This updates the line totals, the subtotal, extra costs and the final sum.

Watch List

Instead of implementing a separate watch-list (some would say wish-list), **django-SHOP** uses a simple trick. Whenever the quantity of a cart item is zero, this item is considered to be in the watch list. Otherwise it is considered to be in the cart. The train of thought is as follows: A quantity of zero, never makes sense for items in the cart. On the other side, any quantity makes sense for items in the watch-list. Therefore reducing the quantity of a cart item to zero is the same as keeping an eye on it, without actually wanting it to purchase.

4.10.3 Cart Views

Displaying the cart in **django-SHOP** is as simple, as adding any other page to the CMS. Change into the Django admin backend and enter into the CMS page tree. At an appropriate location in that tree add a new page. As page title use “Cart”, “Basket”, “Warenkorb”, “Cesta”, or whatever is appropriate in the natural language used for that site. Multilingual CMS installations offer a page title for each language.

In the CMS page editor click onto the link named **Advanced Settings** at the bottom of the popup window. As template, choose the default one, provided it contains at least one big [placeholder](#).

Enter “shop-cart” into the **Id**-field just below. This identifier is required by some templates which link directly onto the cart view page. If this field is not set, some links onto the cart page might not work properly.

It is suggested to check the checkbox named **Soft root**. This prevents that a menu item named “Cart” will appear side by side with other pages from the CMS. Instead, we prefer to render a special cart symbol located on the right of the navigation bar.

Cart using a Cascade Plugin

Click onto **View on site** and change into front-end editing mode to use the grid-system of [djangocms-cascade](#). Locate the main placeholder and add a **Row** followed by at least one **Column** plugin; both can be found in section **Bootstrap**. Below that column plugin, add a child named **Cart** from section **Shop**. This Cart Plugin can be rendered in four different ways:

The screenshot displays the 'Main Content Container' in front-end editing mode. It shows a grid layout with the following structure:




- Row with 1 column:** Contains a 'Column default width: 12 units' which includes a 'Cart Editable Cart' plugin.
- Row with 2 columns:**
 - Column widths: 12 / 3 units:** Contains a 'Button Continue Shopping' plugin.
 - Column widths: 12 / 4 units:** Contains a 'Button Proceed to Checkout' plugin.

Each plugin in the grid has a small icon, a plus sign, and a list icon for editing or adding more content.

Editable Cart

An “Editable Cart” is rendered using the Angular JS template engine. This means that a customer may change the number of items, delete them or move them to the watch-list. Each update is reflected immediately into the cart’s subtotal, extra fields and final totals.

Using the above structure, the rendered cart will look similar to this.

Quantity		Product	Unit Price	Total	
1		SDXC Card 64GB	€ 13.99	€ 13.99	⊖ Remove ⊕ Watch Item
1		EXTREME PLUS microSDHC 16GB	€ 8.49	€ 8.49	⊖ Remove ⊕ Watch Item
2		Ultra SDHC 32GB 40Mb/s	€ 16.99	€ 33.98	⊖ Remove ⊕ Watch Item
				Subtotal	€ 56.46
				19% V.A.T incl.	€ 9.01
				Shipping costs	€ 5.00
				Total	€ 61.46

[^ Continue Shopping](#)
[Proceed to Checkout >](#)

Depending on the chosen template, this layout may vary.

Static Cart

An alternative to the editable cart is the *static cart*. Here the cart items are rendered by the Django template engine. Since here everything is static, the quantity can’t be changed anymore and the customer would have to proceed to the checkout without being able to change his mind. This probably only makes sense when purchasing a single product.

Cart Summary

This only displays the cart’s subtotal, the extra cart fields, such as V.A.T., shipping costs and the final total.

Watch List

A special view of the cart is the watch list. It can be used by customers to remember items they want to compare or buy sometimes later. The watch-list by default is editable, but does not allow to change the quantity. This is because the watch-list shares the same object model as the cart items. If the quantity of an item 0, then that cart item is considered to be watched. If instead the quantity is 1 or more, the item is considered to be in the cart. It therefore is very easy to move items from the cart to the watch-list and vice versa. This concept also disallows to have an item in both the cart and the watch-list. This during online shopping, often can be a major point of confusion.

Render templates

The path of the templates used to render the cart views is constructed using the following rules:

- Look for a folder named according to the project's name, ie. `settings.SHOP_APP_LABEL` in lower case. If no such folder can be found, then use the folder named `shop`.
- Search for a subfolder named `cart`.
- Search for a template named `editable.html`, `static.html`, `watch.html` or `summary.html`.

These templates are written to be easily extensible by the customized templates. To override the “*editable cart*” add a template with the path, say `myshop/cart/editable.html` to the projects template folder. This template then shall begin with `{% extend "shop/cart/editable.html" %}` and only override the `{% block %}...{% endblock %}` interested in.

Many of these template blocks are themselves embedded inside HTML elements such as `<script id="shop/...html" type="text/ng-template">`. The reason for this is that the editable cart is rendered in the browser by AngularJS using so called [directives](#). Hence it becomes very straight-forward to override Angular's [script templates](#) using Django's internal template engine.

Multiple templates

If for some special reasons we need different cart templates, then we must add this line to the projects `settings.py`:

```
CMSPLUGIN_CASCADE_PLUGINS_WITH_EXTRA_RENDER_TEMPLATES = {
    'ShopCartPlugin': (
        (None, _("default")), # the default behavior
        ('myproject/cart/other-editable.html', _("extra editable")),
    )
}
```

This will add an extra select button to the cart editor. The site administrator then can choose between the default template and an extra editable cart template.

Proceed to Checkout

On the cart's view, the merchant may decide whether to implement the checkout forms together with the cart, or to create a special checkout page onto which the customer can proceed. From a technical point of view, it doesn't make any difference, if the cart and the checkout are combined on the same CMS page, or if they are split across two or more pages. In the latter case simply add a button at the end of each page, so that the customer can easily proceed to the next one.

On the checkout page, the customer has to fill out a few forms. These can be a contact form, shipping and billing addresses, payment and shipping methods, and many more. Which ones depend on the configuration, the legal regulations and the requirements of the shop's implementation. In *Cascade Plugins* all shop specific CMS plugins are listed. They can be combined into whatever makes sense for a successful checkout.

Add a Cart via manually written Cart Template

Instead of using the CMS plugin system, the template for the cart can also be implemented manually. Based on an existing page template, locate the element, where the cart shall be inserted. Then use one of the existing templates in the folder `django-shop/shop/templates/shop/cart/` as a starting point, and insert it at an appropriate location in the page template. Next, in the project's `settings.py`, add this specialized template to the list `CMS_TEMPLATES` and select it for that page.

From a technical point of view, it does not make any difference whether we use the cart plugin or a handcrafted template. If the HTML code making up the cart has to be adopted to the merchants needs, we normally are better off and much more flexible, if we override the template code as described in section *Render templates*. Therefore, it is strongly discouraged to craft cart and checkout templates by hand.

4.10.4 Cart Modifiers

Cart Modifiers are simple plugins that allow the merchant to define rules in a programmatic way, how the totals of a cart are computed and how they are labeled. A typical job is to compute tax rates, adding discounts, shipping and payment costs, etc.

Instead of implementing each possible combination for all of these use cases, the **django-SHOP** framework offers an API, where third party applications can hook into every computational step. One thing to note here is that Cart Modifiers are not only invoked, when the cart is complete and the customer wants to proceed to the checkout, but also for each item before being added to the cart.

This allows the programmer to vary the price of certain items, depending on the current state of the cart. It can for instance be used, to set one price for the first item, and other prices for every further items added to the cart.

Cart Modifiers are split up into three different categories: Generic, Payment and Shipping. In the shops `settings.py` they must be configured as a list or tuple such as:

```
SHOP_CART_MODIFIERS = (
    'shop.modifiers.defaults.DefaultCartModifier',
    'shop.modifiers.taxes.CartExcludedTaxModifier',
    'myshop.modifiers.PostalShippingModifier',
    'shop.modifiers.defaults.PayInAdvanceModifier',
    'shop_stripe.modifiers.StripePaymentModifier',
)
```

Generic modifiers are applied always. The Shipping and Payment modifiers are applied only for the selected shipping and/or payment method. If the customer has not yet decided, how to ship or how to pay, then the corresponding modifiers are not applied.

When updating the cart, modifiers are applied in the order of the above list. Therefore it makes a difference, if taxes are applied before or after having applied the shipping costs.

Moreover, whenever in the detail view the quantity of a product is updated, then all configured modifiers are ran for that item. This allows the `ItemModelSerializer`, to even change the unit price of a product, depending on the total content of the cart.

Cart modifiers are easy to write and they normally consist only of a few lines of code. It is the intention of **django-SHOP** to seed an eco-system for these kinds of plugins. Besides computing the total, cart modifiers can also be used to sum up the weight, if the merchant's product models specifies it.

Here is an incomplete list of some useful cart modifiers:

Generic Cart Modifiers

These kinds of cart modifiers are applied unconditionally onto the cart. A typical instance is the `DefaultCartModifier`, the `CartIncludeTaxModifier` or the `CartExcludeTaxModifier`.

DefaultCartModifier

The `shop.modifiers.default.DefaultCartModifier` is required for almost every shopping cart. It handles the most basic calculations, ie. multiplying the items unit prices with the chosen quantity. Since this modifier sets the cart item's line total, it must be listed as the first entry in `SHOP_CART_MODIFIERS`.

Payment Cart Modifier

From these kinds of modifiers, only that for the chosen payment method is applied. Payment Modifiers are used to add extra costs or discounts depending on the chosen payment method. By overriding the method `is_disabled` a payment method can be disabled; useful to disable certain payments in case the carts total is below a certain threshold.

Shipping Cart Modifier

From these kinds of modifiers, only that for the chosen shipping method is applied. Shipping Modifiers are used to add extra costs or discounts depending on chosen shipping method, the number of items in the cart and their weight. By overriding the method `is_disabled` a shipping method can be disabled; useful to disable certain payments in case the cart's total is below a certain threshold or the weight is too high.

How Modifiers work

Cart modifiers should extend the `shop.modifiers.base.BaseCartModifier` class and extend one or more of the given methods:

Note: Until version 0.2 of **django-SHOP**, the Cart Modifiers returned the amount and label for the extra item rows, and **django-SHOP** added them up. Since Version 0.3 cart modifiers must change the line subtotals and cart total themselves.

class `shop.modifiers.base.BaseCartModifier`

Cart Modifiers are the cart's counterpart to backends.

They allow to implement taxes, rebates, bulk prices, shipping- and payment costs in an elegant and reusable manner: Every time the cart is refreshed (via it's `update()` method), the cart will call all subclasses of this modifier class registered with their full path in `settings.SHOP_CART_MODIFIERS`.

The methods defined here are called in the following sequence: 1. *pre_process_cart*: Totals are not computed, the cart is "rough": only relations and quantities are available 1a. *pre_process_cart_item*: Line totals are not computed, the cart and its items are "rough": only relations and quantities are available 2. *process_cart_item*: Called for each `cart_item` in the cart. The modifier may change the amount in `cart_item.line_total`. 2a. *add_extra_cart_item_row*: It optionally adds an object of type *ExtraCartRow* to the current cart item. This object adds additional information displayed on each cart items line. 3. *process_cart*: Called once for the whole cart. Here, all fields relative to cart items are filled. Here the carts subtotal is used to computer the carts total.

3a. *add_extra_cart_row*: It optionally adds an object of type *ExtraCartRow* to the current cart. This object adds additional information displayed in the carts footer section. 4. *post_process_cart*: all totals are up-to-date, the cart is ready to be displayed. Any change you make here must be consistent!

Each method accepts the HTTP *request* object. It shall be used to let implementations determine their prices, availability, taxes, discounts, etc. according to the identified customer, the originating country, and other request information.

arrange_watch_items (*watch_items, request*)

Arrange all items, which are being watched. Override this method to resort and regroup the returned items.

arrange_cart_items (*cart_items, request*)

Arrange all items, which are intended for the shopping cart. Override this method to resort and regroup the returned items.

pre_process_cart (*cart, request, raise_exception=False*)

This method will be called before the Cart starts being processed. It shall be used to populate the cart with initial values, but not to compute the cart's totals.

Parameters

- **cart** – The cart object.
- **request** – The request object.
- **raise_exception** – If *True*, raise an exception if cart can not be fulfilled.

pre_process_cart_item (*cart, item, request, raise_exception=False*)

This method will be called for each item before the Cart starts being processed. It shall be used to populate the cart item with initial values, but not to compute the item's linetotal.

Parameters

- **cart** – The cart object.
- **item** – The cart item object.
- **request** – The request object.
- **raise_exception** – If *True*, raise an exception if cart can not be fulfilled.

process_cart_item (*cart_item, request*)

This will be called for every line item in the Cart: Line items typically contain: product, unit_price, quantity and a dictionary with extra row information.

If configured, the starting line total for every line (unit price * quantity) is computed by the *DefaultCartModifier*, which typically is listed as the first modifier. Posterior modifiers can optionally change the cart items line total.

After processing all cart items with all modifiers, these line totals are summed up to form the carts subtotal, which is used by method *process_cart*.

post_process_cart_item (*cart, item, request*)

This will be called for every line item in the Cart, while finally processing the Cart. It may be used to collect the computed line totals for each modifier.

process_cart (*cart, request*)

This will be called once per Cart, after every line item was treated by method *process_cart_item*.

The subtotal for the cart is already known, but the total is still unknown. Like for the line items, the total is expected to be calculated by the first cart modifier, which typically is the *DefaultCartModifier*. Posterior modifiers can optionally change the total and add additional information to the cart using an object of type *ExtraCartRow*.

post_process_cart (*cart, request*)

This method will be called after the cart was processed in reverse order of the registered cart modifiers. The Cart object is “final” and all the fields are computed. Remember that anything changed at this point should be consistent: If updating the price you should also update all relevant totals (for example).

add_extra_cart_item_row (*cart_item, request*)

Optionally add an *ExtraCartRow* object to the current cart item.

This allows to add an additional row description to a cart item line. This method optionally utilizes and/or modifies the amount in *cart_item.line_total*.

add_extra_cart_row (*cart, request*)

Optionally add an *ExtraCartRow* object to the current cart.

This allows to add an additional row description to the cart. This method optionally utilizes *cart.subtotal* and/or modifies the amount in *cart.total*.

4.11 Controlling the Cart Icon

On e-commerce sites, typically a cart- or basket symbol is located on the top right corner of the navigation bar and clicking on it, normally loads the cart page.

Together with the cart icon, we often want to display an additional caption, such as the number of items and/or the cart’s total. The cart item typically is rendered using the templatetag `{% cart_icon %}`. It can be styled using the template `myshop/templatetags/cart-icon.html`, or if it doesn’t exist, falls back on `shop/templatetags/cart-icon.html`.

4.11.1 Cart Icon Caption

This is where the client-side cart controller enters the scene. Adding product to –, or editing the cart changes the number of items and/or the cart’s total. Therefore we must update its caption whenever we detect a modification in the cart. A typical use pattern, for example is:

```
<a href="{% page_url 'shop-cart' %}">
  <i class="fa fa-shopping-cart fa-fw fa-lg"></i>
  <shop-carticon-caption caption-data="{num_items: {{ cart.num_items|default:0 }} }"
  ↪"></shop-carticon-caption>
</a>
```

The AngularJS directive `<shop-carticon-caption ...>` is itself styled using an Angular template such as:

```
<script id="shop/carticon-caption.html" type="text/ng-template">
  <ng-pluralize count="caption.num_items" when="{ '1': '{% trans "1 Item" context
  ↪"cart icon" %}', 'other': '{% trans "{} Items" context "cart icon" %}' }"></ng-
  ↪pluralize>
</script>
```

Whenever this AngularJS directive receives an event of type `shop.carticon.caption`, then it updates the cart icon’s caption with the current state of the cart. The emitter of such an event typically is the cart editor or an add-to-cart directive. If this function has already computed the new caption data, it may send it to the cart item, such as:

```
$scope.$emit('shop.carticon.caption', caption_data);
```

otherwise, if it emits the signal without object, the AngularJS directive `shopCarticonCaption` will fetch the updated caption data from the server. The latter invokes an additional HTTP request but is useful, if the caption shall for instance contain the cart’s total, since this has to be computed on the server anyway.

4.12 Payment Providers

Payment Providers are simple classes, which create an interface from an external [Payment Service Provider](#) (shortcut PSP) to our **django-SHOP** framework.

Payment Providers must be aggregates of a *Payment Cart Modifier*. Here the Payment Cart Modifier computes extra fees when selected as a payment method, whereas our Payment Provider class, handles the communication with the configured PSP, whenever the customer submits the purchase request.

In **django-SHOP** Payment Providers normally are packed into separate plugins, so here we will show how to create one yourself instead of explaining the configuration of an existing Payment gateway.

A precautionary measure during payments with credit cards is, that the used e-commerce implementation never sees the card numbers or any other sensible information. Otherwise those merchants would have to be [PCI-DSS certified](#), which is an additional, but often unnecessary bureaucratic task, since most PSPs handle that task for us.

4.12.1 Checkout Forms

Since the merchant is not allowed to “see” sensitive credit card information, some Payment Service Providers require, that customers are redirected to their site so that there, they can enter their credit card numbers. This for some customers is disturbing, because they visually leave the current shop site.

Therefore other PSPs allow to create form elements in HTML, whose content is send to their site during the purchase task. This can be done using a POST submission, followed by a redirection back to the client. Other providers use Javascript for submission and return a payment token to the customer, which itself forwards that token to the shopping site.

All in all, there are so many different ways to do online payment, that it is quite tricky to find a generic solution compatible for all of them.

In **django-SHOP**, we can add some Javascript specific to the PSP’s needs, which is used during the purchase operation. Let’s explain how it works:

The Purchasing Operation

During checkout, the clients final step is to click onto a button labeled something like “Buy Now”. This button belongs to an AngularJS controller, provided by the directive `shop-dialog-proceed`. It may look similar to this:

```
.. code-block:: html
```

```
<button shop-dialog-proceed ng-click="proceedWith('PURCHASE_NOW')" class="btn btn-  
success">Buy Now</button>
```

Whenever the customer clicks onto that button, the function `proceedWith('PURCHASE_NOW')` is invoked in the scope of the AngularJS controller, belonging to the given directive.

This function first uploads the current checkout forms to the server. There the form is validated, and if everything is OK, an updated checkout context is send back to the client. For implementation details, have a look at the endpoint at `shop.views.checkout.CheckoutViewSet.upload()`.

Next, the success handler of the previous submission looks at the given action. In `proceedWith`, we used the magic keyword `PURCHASE_NOW`, which starts a second submission to the server, requesting to begin with the purchase operation (see `shop.views.checkout.CheckoutViewSet.purchase()` for details.). This method determines the payment provider previously chosen by the customer. It then invokes the method `get_payment_request()` of that provider, which returns a Javascript expression.

On the client, this returned Javascript expression is passed to the `eval()` function and executed; it then normally starts to submit the payment request, sending all credit card data to the given PSP.

While processing the payment, PSPs usually need to communicate with the shop framework, in order to inform us about success or failure of the payment. To communicate with us, they may need a few endpoints. Each class inheriting from `shop.shop.payment.providers.PaymentProvider` may override the method `get_urls()` returning a list of urlpatterns, which then is used by the Django URL resolving engine.

```
from shop.payment.providers import PaymentProvider

class MyPSP(PaymentProvider):
    namespace = 'my-psp-payment'

    def get_urls(self):
        urlpatterns = [
            url(r'^success$', self.success_view, name='success'),
            url(r'^failure$', self.failure_view, name='failure'),
        ]
        return urlpatterns

    def get_payment_request(self, cart, request):
        js_expression = 'scope.charge().then(function(response) { $window.location.
↳href=response.data.thank_you_url; });'
        return js_expression

    @classmethod
    def success_view(cls, request):
        # approve payment using request data returned by PSP
        cart = CartModel.objects.get_from_request(request)
        order = OrderModel.objects.create_from_cart(cart, request)
        order.populate_from_cart(cart, request)
        order.add_paypal_payment(payment.to_dict())
        order.save(with_notification=True)
        return HttpResponseRedirect(order.get_absolute_url())

    @classmethod
    def failure_view(cls, request):
        """Redirect onto an URL informing the customer about a failed payment"""
        cancel_url = Page.objects.public().get(reverse_id='cancel-payment').get_
↳absolute_url()
        return HttpResponseRedirect(cancel_url)
```

Note: The directive `shop-dialog-proceed` evaluates the returned Javascript expression inside a chained `then(...)`-handler from the AngularJS [promise framework](#). This means that such a function may itself return a new promise, which is resolved by the next `then()`-handler.

As we can see in this example, by evaluating arbitrary Javascript on the client, combined with HTTP-handlers for any endpoint, **django-SHOP** is able to offer an API where adding new Payment Service Providers doesn't require any special tricks.

4.13 Order

During checkout, at a certain point the customer has to click on a button named “*Purchase Now*”. This operation performs quite a few tasks: One of them is to convert the cart with its items into an order. The final task is to reset the

cart, which means to remove its content. This operation is atomic and not reversible.

4.13.1 Order Models

An order consists of two models classes `Order` and `OrderItem`, both inheriting from `BaseOrder` and `BaseOrderItem` respectively. As with most models in **django-SHOP**, they are *Deferred Model Pattern*, so that inheriting from a base class automatically sets the foreign keys to the appropriate model. This gives the programmer the flexibility to add as many fields to the order model, as the merchant requires for his special implementation.

In most use-cases, the default implementation of the order model will do the job. These default classes can be found at `shop.models.defaults.order.Order` and `shop.models.defaults.order_item.OrderItem`. To materialize the default implementation, it is enough to import these two files into the merchant's shop project. Otherwise the programmer may create his own order implementation inheriting from `BaseOrder` and/or `BaseOrderItem`.

Note: Assure that the model `OrderItem` is imported (and materialized) before model `Product` and classes derived from it.

The order item quantity can not always be represented by natural numbers, therefore this field must be added to the `OrderItem` implementation rather than its base class. Since the quantity is copied from the cart item to the order item, its field type must correspond to that of `CartItem.quantity`.

Create an Order from the Cart

Whenever the customer performs the purchase operation, the cart object is converted into a new order object by invoking:

```
from shop.models.order import OrderModel

order = OrderModel.objects.create_from_cart(cart, request)
order.populate_from_cart(cart, request)
```

This invocation of `order.populate_from_cart` operation is atomic and can take some time. It normally is performed by the payment provider, whenever a successful payment was received.

Since the merchant's implementation of `Cart`, `CartItem`, `Order` and `OrderItem` may contain extra fields the shop framework isn't aware of, the content of these fields also shall be transferred, whenever a cart is converted into an order object, during the purchasing operation.

If required, the merchant's implementation of `Order` shall override the method `populate_from_cart(cart, request)`, which provides a hook to copy those extra fields from the cart object to the order object.

Similarly the merchant's implementation of `OrderItem` shall override the method `populate_from_cart_item(cart_item, request)`, which provides a hook to copy those extra fields from the cart item to the order item object.

Order Numbers

In commerce it is mandatory that orders are numbered using a unique and continuously increasing sequence. Each merchant has his own way to generate this sequence numbers and in some implementations it may even come from an external generator, such as an ERP system. Therefore **django-SHOP** does not impose any numbering scheme for the orders. This intentionally is left over to the merchant's implementation, which may be implemented as:

```

from django.db import models
from django.utils.datetime_safe import datetime
from shop.models import order

class Order(order.BaseOrder):
    number = models.PositiveIntegerField("Order Number", null=True, default=None,
    ↪unique=True)

    def get_or_assign_number(self):
        if self.number is None:
            epoch = datetime.now().date()
            epoch = epoch.replace(epoch.year, 1, 1)
            qs = Order.objects.filter(number__isnull=False, created_at__gt=epoch)
            qs = qs.aggregate(models.Max('number'))
            try:
                epoc_number = int(str(qs['number__max'])[4:]) + 1
                self.number = int('{0}{1:05d}'.format(epoch.year, epoc_number))
            except (KeyError, ValueError):
                # the first order this year
                self.number = int('{0}00001'.format(epoch.year))
        return self.get_number()

    def get_number(self):
        return '{0}-{1}'.format(str(self.number)[:4], str(self.number)[4:])

    @classmethod
    def resolve_number(cls, number):
        number = number[:4] + number[5:]
        return dict(number=number)

```

Here we override these three methods, otherwise the order number would be identical to its primary key which is not suitable for all e-commerce sites.

Method `get_or_assign_number()`

Is used to assign a new number to an Order object, if none has been assigned yet, otherwise it returns the assigned one.

Method `get_number()`

Retrieves the order number assigned to an order in a human readable form. Here the first four digits specify the year in which the order was generated, whereas the last five digits are a continuous increasing sequence.

Classmethod `resolve_number(number)`

Chances are high that we use the order number as slug, or for any other similar identification purpose. If we look up for a certain order object using `Order.objects.get(...)` or `Order.objects.filter(...)`, then we might want to use a number previously retrieved with `get_number`. This classmethod therefore must reverse the operation of building order numbers.

4.13.2 Order Views

Displaying the last or former orders in **django-SHOP** is as simple, as adding two pages to the CMS. Change into the Django admin backend and enter into the CMS page tree. At an appropriate location in that tree add a new page. As page title use “My Orders”, “Ihre Bestellungen”, “Mis Pedidos”, or whatever is appropriate in the natural language used for that site. Multilingual CMS installations offer a page title for each language.

In the CMS page editor click onto the link named **Advanced Settings** at the bottom of the popup window. As template, choose the default one, provided it contains at least one big `placeholder`.

Enter “shop-order” into the **Id**-field just below. This identifier is required by some templates which link directly onto the orders list view page. If this field is not set, some links onto this page might not work properly.

The Order Views must be rendered by their own CMS `apphook`. Locate the field **Application** and choose “View Orders”.

Below this “My Orders” page, add another page named “Thanks for Your Order”, “Danke für Ihre Bestellung” or “Gracias por su pedido”. Change into the **Advanced Settings** view and as the rendering template select “*Inherit the template of the nearest ancestor*”. Next enter “shop-order-last” into the **Id**-field just below. As **Application** choose again “View Orders”.

CMS Apphook for the Order

The apphook for the Order View must be provided by the Django project. This is a simple snippet of boilerplate which has to be added to the merchant’s implementation of the file `myshop/cms_apps.py`:

```
from cms.apphook_pool import apphook_pool
from shop.cms_apphooks import OrderCMSApp

class OrderApp(OrderCMSApp):
    pass

apphook_pool.register(OrderApp)
```

This apphook uses the class `shop.views.order.OrderView` to render the order’s list- and detail views using the serializers `shop.serializers.order.OrderListSerializer` and `shop.serializers.order.OrderDetailSerializer`. Sometimes these defaults aren’t enough and must be extended by a customized serializer. Say, our Order class contains the rendered shipping and billing addresses. Then we can extend our serializer class by adding them:

Listing 13: `myshop/serializers.py`

```
from shop.serializers.order import OrderDetailSerializer

class CustomOrderSerializer(OrderDetailSerializer):
    shipping_address_text = serializers.CharField(read_only=True)
    billing_address_text = serializers.CharField(read_only=True)
```

We now can replace the `urls` attribute in our apphook class with, say `['myshop.urls.order']` and exchange the default serializer with our customized one:

Listing 14: `myshop/urls/order.py`

```
from django.conf.urls import url
from shop.views.order import OrderView
from myshop.serializers import CustomOrderSerializer
```

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```
urlpatterns = [
    url(r'^$', OrderView.as_view()),
    url(r'^(?P<pk>\d+)$', OrderView.as_view(many=False,
        detail_serializer_class=CustomOrderSerializer)),
]
```

Now, when invoking the order detail page appending `?format=api` to the URL, then two new fields, `shipping_address_text` and `billing_address_text` shall appear in our context.

Add the Order list view via CMS-Cascade Plugin

Click onto **View on site** and change into front-end editing mode to use the grid-system of `djangocms-cascade`. Locate the main placeholder and add a **Row** followed by at least one **Column** plugin; both can be found in section **Bootstrap**. Below that column plugin, add a child named **Order Views** from section **Shop**.

We have to perform this operation a second time for the page named “Thanks for Your Order”. The context menus for copying and pasting may be helpful here.


Note that the page “My Orders” handles two views: By invoking it as a normal CMS page, it renders a list of all orders the currently logged in customer has purchased at this shop:

Your Orders

Order Date	Sum	Shipping Address	Status
5. Dez. 2015	€ 404.00	John Does Lie Street 987987 London United Kingdom	Paid using Stripe

Clicking on one of the orders in this list, changes into a detail view, where one can see a list of items purchased during that shopping session:

Your order from 05.12.2015

Quantity	Product	Unit price	Total
1	 Nexus 4	€ 399,00	€ 399,00
Subtotal			€ 399.00
incl. 19% V.A.T.			€ 63.71
Shipping costs			€ 5,00
Total			€ 404.00
Thereof paid			€ 404.00

The rendered list is a historical snapshot of the cart in the moment of purchase. If in the meantime the prices of products, tax rates, shipping costs or whatever changed, then that order object always keeps the values at that time in history. This even applies to translations. Strings are translated into their natural language on the moment of purchase. Therefore the labels added to the last rows of the cart, always are rendered in the language which was used during the checkout process.

Render templates

The path of the templates used to render the order views is constructed using the following rules:

- Look for a folder named according to the project's name, ie. `settings.SHOP_APP_LABEL` in lower case. If no such folder can be found, then use the folder named `shop`.
- Search for a subfolder named `order`.
- Search for a template named `list.html` or `detail.html`.

These templates are written to be easily extensible by the customized templates. To override them, add a template with the path, say `myshop/order/list.html` to the projects template folder.

4.13.3 Order Workflows

Order Workflows are simple plugins that allow the merchant to define rules in a programmatic way, which actions to perform, whenever a certain event happened. A typical event is the confirmation of a payment, which itself triggers further actions, say to print a delivery note.

Instead of implementing each possible combination for all of these use cases, the **django-SHOP** framework offers a [Finite State Machine](#), where only selected state transition can be marked as possible. These transition further can trigger other events themselves. This prevents to accidentally perform invalid actions such as fulfilling orders, which haven't been paid yet.

In class `shop.models.order.BaseOrder` contains an attribute `status` which is of type `FSMField`. In practice this is a char-field, which can hold preconfigured states, but which *can not* be changed by program code. Instead, by calling specially decorated class methods, this state then changes from one or more allowed source states into one predefined target state. We denote this as a *state transition*.

An incomplete example:

```
class Order(models.Model):
    # other attributes

    @transition(field=status, source='new', target='created')
    def populate_from_cart(self, cart, request):
        # perform some side effects ...
```

Whenever an `Order` object is initialized, its `status` is `new` and is not yet populated with cart items, meaning that it resides in a pending state. As we have seen earlier, this object must be populated from the cart. If this succeeds, the `status` of our new `Order` object switches to `created`.

In **django-SHOP** the merchant can add as many payment providers he wants. This is done in `settings.py` through the configuration directive `SHOP_ORDER_WORKFLOWS` which takes a list of so called “*Order Workflow Mixin*” classes. On bootstrapping the application and constructing the `Order` class, it additionally inherits from these mixin classes. This gives the merchant an easy to configure, yet very powerful tool to model the selling process of his e-commerce site according to his needs. Say, we want to accept bank transfer in advance, so we must add `'shop.payment.defaults.PayInAdvanceWorkflowMixin'` to our configuration setting. Additionally we must assure that the checkout process has been configured to offer the corresponding cart modifier:

```
SHOP_CART_MODIFIERS = (
    ...
    'shop.modifiers.defaults.PayInAdvanceModifier',
    ...
)
```

This mixin class contains a few transition methods, lets for instance have a closer look onto

```
@transition(field='status', source=['created'], target='awaiting_payment')
def awaiting_payment(self):
    """Signals that an Order awaits payments."""
```

This method actually does nothing, beside changing the status from “*created*” to “*awaiting_payment*”. It is invoked by the method `get_payment_request()` from `ForwardFundPayment`, which is the default payment provider of the configured `PayInAdvanceModifier` cart modifier.

The class `PayInAdvanceWorkflowMixin` has two other transition methods worth mentioning:

```
@transition(field='status', source=['awaiting_payment'],
            target='prepayment_deposited', conditions=[is_fully_paid],
            custom=dict(admin=True, button_name=_("Mark as Paid")))
def prepayment_fully_deposited(self):
    """Signals that the current Order received a payment."""
```

This method can be invoked by the Django admin backend when saving an existing `Order` object, but only under the condition that it is fully paid. The method `is_fully_paid()` iterates over all payments associated with its `Order` object, sums them up and compares them against the total. If the entered payment equals or exceeds the order’s total, this method returns `True` and the condition for the given transition is met. This then adds a button labeled “*Mark as Paid*” at the bottom of the admin view. Whenever the merchant clicks on this button, the above method `prepayment_fully_deposited` is invoked. This then changes the order’s status from “*awaiting_payment*” to “*prepayment_deposited*”. The *Notifications* of **django-SHOP** can intercept this transition change and perform preconfigured action, such as sending a payment confirmation email to the customer.

Now that the order has been paid, it time to fulfill it. For this a merchant can use the workflow mixin class `shop.shipping.defaults.CommissionGoodsWorkflowMixin`, which gives him a hand to keep track on the fulfillment of each order. Since this class doesn’t know anything about an order status of “*prepayment_deposited*” (this is a private definition of the class `PayInAdvanceWorkflowMixin`), **django-SHOP** provides a status to mark the payment of an order as confirmed. Therefore another transition is added to our mixin class, which is invoked automatically by the framework whenever the status changes to “*prepayment_deposited*”:

```
@transition(field='status', source=['prepayment_deposited',
            'no_payment_required'], custom=dict(auto=True))
def acknowledge_prepayment(self):
    """Acknowledge the payment."""
    self.acknowledge_payment()
```

This status, “*payment_confirmed*”, is known by all other workflow mixin classes and must be used as the source argument for their transition methods.

For further details on Finite State Machine transitions, please refer to the [FSM docs](#). This however does not cover the contents of dictionary `custom`. One of the attributes in `custom` is `button="Any Label"` as explained in the [FSM admin docs](#). The other is `auto=True` and has been introduced by **django-SHOP** itself. It is used to automatically proceed from one target to another one, without manual intervention, such as clicking onto a button.

Signals

Each state transition emits a [signal](#) before and after performing the status change. These signals, `pre_transition` and `post_transition` can be received by any registered signal handler. In **django-SHOP**, the notification framework listens for these events and creates appropriate notification e-mails, if configured.

But sometimes simple notifications are not enough, and the merchant’s implementation must perform actions in a programmatic way. This for instance could be a query, which shall be sent to the goods management database, whenever a payment has been confirmed successfully.

In Django, we typically register signal handlers in the `ready` method of the merchant’s [application configuration](#):

Listing 15: myshop/apps.py

```
from django.apps import AppConfig

class MyShopConfig(AppConfig):
    name = 'my_shop'

    def ready(self):
        from django_fsm.signals import post_transition
        post_transition.connect(order_event_notification)

def order_event_notification(sender, instance=None, target=None, **kwargs):
    if target == 'payment_confirmed':
        # do whatever appropriate
```

In the above order event notification, use `instance` to access the corresponding `Order` object.

Finite State Machine Diagram

If `graphviz` is installed on the operating system, it is pretty simple to render a graphical representation of the currently configured Finite State Machine. Simply invoke:

```
./manage.py ./manage.py graph_transitions -o fsm-graph.png
```

Applied to our demo shop, this gives the following graph:



4.13.4 Order Admin

The order admin backend is likely the most heavily used editor for **django-SHOP** installation. Here the merchant must manage all incoming orders, payments, customer annotations, deliveries, etc. By automating common tasks, the backend shall prevent careless mistakes: It should for instance neither be possible to ship unpaid goods, nor to cancel a delivered order.

Since the **django-SHOP** framework does not know which class model is used to implement an `Order`, it intentionally doesn't register its prepared administration class for that model. This has to be done by the merchant implementing the shop. It allows to add additional fields and other mixin classes, before registration.

For instance, the admin class used to manage the `Order` model in our shop project, could be implemented as:

Listing 16: myshop/admin.py

```
from django.contrib import admin
from shop.models.order import OrderModel
from shop.admin.order import (PrintInvoiceAdminMixin,
                              BaseOrderAdmin, OrderPaymentInline, OrderItemInline)

@admin.register(OrderModel)
class OrderAdmin(PrintInvoiceAdminMixin, BaseOrderAdmin):
    fields = BaseOrderAdmin.fields + (
        ('shipping_address_text', 'billing_address_text',),)
    inlines = (OrderItemInline, OrderPaymentInline,)
```

The fields `shipping_address_text` and `billing_address_text` are not part of the abstract model class `BaseOrder` and therefore must be referenced separately.

Another useful mixin class to be added to this admin backend is `PrintInvoiceAdminMixin`. Whenever the status of an order shows it has been paid, a button labeled “*Print Invoice*” is added to the order admin form. Clicking on that button displays one or more pages optimized for printing.

The template for the invoice and delivery note can easily be adopted to the corporate design using plain HTML and CSS.

Rendering extra fields

The models `Order` and `OrderItems` both contain a JSON field to hold arbitrary data, collected during the checkout process. Here for instance, **django-SHOP** stores the computations as performed by the [Cart Modifiers](#). Displaying them in Django’s admin backend would result in a rendered Python dictionary, which is not well readable by humans.

Therefore the merchant may add a template, which is rendered using the content of that JSON field, named `extra`. For the implemented order model the merchant may add a template named `<myshop>/admin/order-extra.html` to its template folder. This template then shall render all the fields as available inside that JSON field. Here `rows` contains a list of computations added by the cart modifiers.

Additionally, a merchant may add templates which are rendered using the contents of the JSON fields, for each of the order item associated with the given order. Since order items can refer to different types of products, we may add a template for each of them. It is named `<myshop>/admin/orderitem-<productname>-extra.html` whereas `productname` is the class name in lowercase of the model implementing that product. If no such template could be found, then a template named `<myshop>/admin/orderitem-product-extra.html` is used as fallback. If no template is provided, then the content of these extra fields is not rendered.

4.13.5 Re-adding an Order to the Cart

Sometimes it can be useful to re-add the content of an order back to the cart. This functionality currently is implemented only via the REST-API. By checking the field `reorder` before posting the data, the content of the given order is copied into the cart.

4.14 Managing the Deliver Process

Depending on the merchant’s setup, an order can be considered as one inseparably unit, or if partial shipping shall be allowed, as a collection of single products, which can be delivered individually.

To enable partial shipping, assure that both classes `shop.models.delivery.BaseDelivery` and `shop.models.delivery.BaseDeliveryItem` are instantiated. The easiest way to do this is to import the default materialized classes into an existing model class:

```
from shop.models.defaults.delivery import Delivery, DeliveryItem

__all__ = ['Delivery', 'DeliveryItem']  # prevent IDE to complain about unused imports
```

4.14.1 Partial Delivery Workflow

The class implementing the `Order`, requires additional methods provided by the mixin `shop.shipping.delivery.PartialDeliveryWorkflowMixin`. Mix this into the `Order` class by configuring:

```
SHOP_ORDER_WORKFLOWS = (
    # other workflow mixins
    'shop.shipping.defaults.PartialDeliveryWorkflowMixin',
)
```

Note: Do not combine this mixin with `shop.shipping.defaults.CommissionGoodsWorkflowMixin`.

4.14.2 Administration Backend

To control partial delivery, add the class `shop.admin.delivery.DeliveryOrderAdminMixin` to the `admin` class implementing an `Order`:

Listing 17: myshop/admin/order.py

```
from django.contrib import admin
from shop.admin.order import BaseOrderAdmin
from shop.models.defaults.order import Order
from shop.admin.delivery import DeliveryOrderAdminMixin

@admin.register(Order)
class OrderAdmin(DeliveryOrderAdminMixin, BaseOrderAdmin):
    pass
```

4.14.3 Implementation Details

When partial delivery is activated, two additional tables are added to the database, one for each delivery and one for each delivered order item. This allows us to split up the quantity of an ordered item into two or more delivery objects. This can be useful, if a product is sold out, but the merchant wants to ship whatever is available on stock. The merchant then creates a delivery object and assigns the available quantity to each linked delivery item.

If a product is not available at all anymore, the merchant can alternatively cancel that order item.

4.15 Designing an Address Model

Depending on the merchant's needs, the business model and the catchment area of the site, the used address models may vary widely. Since **django-SHOP** allows to subclass almost every database model, addresses are no exception

here. Therefore the class `shop.models.address.BaseAddress` does not provide any defaults, except for a foreign key to the Customer model and a priority field used to sort multiple addresses by relevance.

4.15.1 Create a Customized Address Model

All the fields which make up an address, such as the addressee, the street name, zip code, etc. are part of the concrete model implementing an address. It is the merchant's responsibility to define which address fields are required for the site's needs. Therefore the base address model does not contain any address related fields, they instead have to be declared by the merchant.

A concrete implementation of the shipping address model may look like this, which not really by coincidence is similar to the address model as shipped by default (see below).

```
from shop.models.address import BaseShippingAddress, ISO_3166_CODES

class ShippingAddress(BaseShippingAddress):
    name = models.CharField(
        "Full name",
        max_length=1024,
    )

    address1 = models.CharField(
        "Address line 1",
        max_length=1024,
    )

    address2 = models.CharField(
        "Address line 2",
        max_length=1024,
    )

    zip_code = models.CharField(
        "ZIP / Postal code",
        max_length=12,
    )

    city = models.CharField(
        "City",
        max_length=1024,
    )

    country = models.CharField(
        "Country",
        max_length=3,
        choices=ISO_3166_CODES,
    )

    class Meta:
        verbose_name = "Shipping Address"
        verbose_name_plural = "Shipping Addresses"
```

Since the billing address may contain different fields, it must be defined separately from the shipping address. To avoid the duplicate definition of common fields for both models, use a mixin class such as:

```
from django.db import models
from shop.models.address import BaseBillingAddress
```

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```

class AddressModelMixin(models.Model):
    name = models.CharField(
        "Full name",
        max_length=1024,
    )

    address1 = models.CharField(
        "Address line 1",
        max_length=1024,
    )
    # other fields

    class Meta:
        abstract = True

class BillingAddress(BaseBillingAddress, AddressModelMixin):
    tax_number = models.CharField(
        "Tax number",
        max_length=50,
    )

    class Meta:
        verbose_name = "Billing Address"
        verbose_name_plural = "Billing Addresses"

```

The Default Address Model

The simplest way is to materialize the required address classes, is to use them from our default and convenience models: `shop.models.defaults.address.ShippingAddress` and `shop.models.defaults.address.BillingAddress`. Before using them, we check if they fulfill our requirements. Otherwise we create our own address models inheriting from `shop.models.address.BaseAddress`.

Note: After changing the address model, remember to create a database migration of the merchant implementation, and apply it.

4.15.2 Multiple Addresses

In **django-SHOP**, if the merchant activates this feature, while setting up the site, customers can register more than one address. Using the **Checkout Address Form Plugin**, we can enable this feature.

Now during checkout, the customer can select one of a previously entered shipping- and billing addresses, or if he desires add a new one to his list of existing addresses.

4.15.3 How Addresses are used

Each active `Cart` object refers to one shipping address object and/or one billing address object. This means that the customer can change those addresses whenever he uses the supplied address forms.

However, when the customer purchases the content of the cart, that address object is converted into a simple text string and stored inside the then created `Order` object. This is to freeze the actual wording of the entered address. It also

assures that the address used for delivery and printed on the invoice is immune against accidental changes after the purchasing operation.

By adding a template named `myshop/address.txt` for both address models, or `myshop/shipping-address.txt` and `myshop/billing-address.txt` for each of them, the merchant can define how the address shall be rendered on fulfilled orders.

Address Form

☒ Shipping ☐ Billing

Render as

☒ Form dialog ☐ Static summary

A dialog can also be rendered as a box containing a read-only summary.

Multiple Addresses



Allow the customer to add and edit multiple addresses.

Use primary address



Allow the customer to use the primary address, if this is the secondary form.

Headline Legend



Render a legend inside the dialog's headline.

Address Formatting

Whenever the customer fulfills the purchase operation, the corresponding shipping- and billing address objects are rendered into a short paragraph of plain text, separated by the newline character. This formatted address then is used to print address labels for parcel delivery and printed invoices.

It is the merchant's responsibility to format these addresses according to the local practice. A customized address template must be added into the merchant's implementation below the `templates` folder named `myshop/shipping_address.txt` or `myshop/billing_address.txt`. If both address models share the same fields, we may also use `myshop/address.txt` as a fallback. Such an address template may look like:

Listing 18: myshop/address.txt

```
{{ address.name }}
{{ address.address1 }}{% if address.address2 %}
{{ address.address2 }}
{% endif %}
{{ address.zip_code }} {{ address.city }}
{{ address.get_country_display }}
```

This template is used by the method `as_text()` as found in each address model.

4.15.4 Use Shipping Address for Billing or vice versa

Most customers use their shipping address for billing. Therefore, unless you have really special needs, it is suggested to share all address fields required for shipping, also with the billing address. The customer then can reuse the shipping address for billing, if he desires to. Technically, if the billing address is unset, the shipping address is used anyway, but in **django-SHOP** the merchant has to actively give permission to his customers, to reuse this address for billing.

The merchant has to actively allow this setting on the site, while editing the **Address Form Plugin**.

Warning: If the merchant allows to use the shipping address for billing and vice versa, then if the customer selects both options, we end up having no address at all. It therefore is strongly recommended, that one address acts as primary, and that the option “*Use primary address*” is checked only on the secondary one.

4.15.5 Address Forms

The address form, where customers can insert their address, is generated automatically and in a DRY manner. This means that whenever a field is added, modified or removed from the address model, the corresponding fields in the address input form, reflect those changes and without any additional programming. When creating the form template, we have to write it using the `as_div()` method. This method also adds automatic client-side form validation to the corresponding HTML code.

Shipping Address

Choose a previously used shipping address

1. John Doe – 31 Orwell Road – L41RG Liverpool – United Kingdom –

Full name *

John Doe

Address line 1 *

31 Orwell Road

Address line 2

ZIP / Postal code *

L41RG

City *

Liverpool

Country *

United Kingdom

ⓧ Remove this address

☒ Use shipping address for billing

* These fields are required

Proceed

Address Form Styling

One problem which remains with automatic form generation, is how to style the input fields. Therefore, **django-SHOP** wraps every input field into a `<div>`-element using a CSS class named according to the field. This for instance is useful to shorten some input fields and/or place them onto the same line.

Say, any of our address forms contain the fields `zip_code` and `city` as shown in the example above. Then they may be styled as

```
.shop-address-zip_code {
  width: 35%;
  display: inline-block;
  padding-right: 10px;
}

.shop-address-city {
  width: 65%;
  display: inline-block;
  padding-left: 10px;
}
```

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}

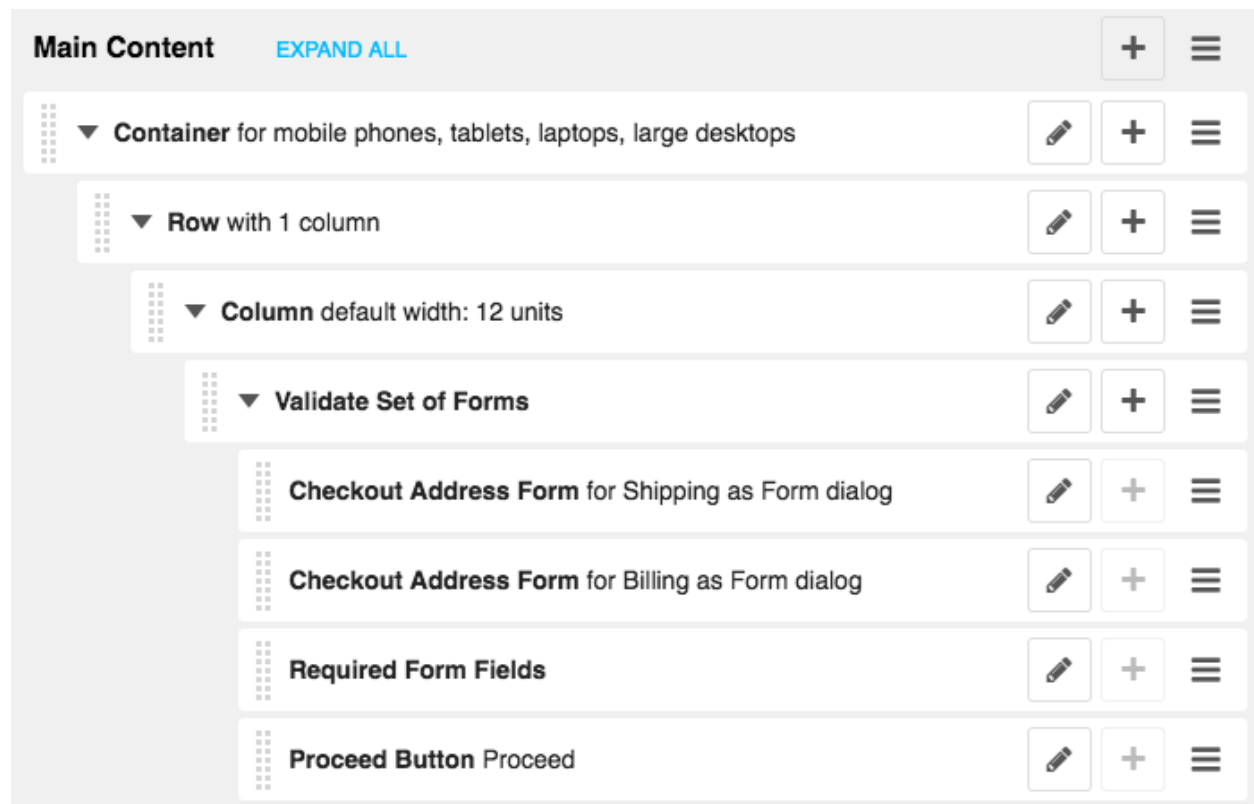
so that the ZIP field is narrower and precedes the location field on the same line.

Note: If you override the supplied address form templates, assure that the statement `{{ ..._address_form.as_div }}` is wrapped into a `{% spaceless %}`-block. Otherwise that CSS trick doesn't work properly.

4.15.6 Arranging Address Forms

Typically, we ask the customer during the checkout process, for his shipping and/or billing addresses. This however is completely up to the merchant; from a technical point of view, the step when to ask the customer for his addresses is completely arbitrary and can be skipped at all for shops which exclusively ship virtual goods.

Good practice however is, to add the shipping and billing forms on the checkout process. Since we want to ensure that a customer must enter a valid address, we wrap the address forms into a so called **Validate Set of Forms Plugin**. This inhibits a customer to proceed to the next page and hence to the purchasing step, whenever at least one form did not validate.



4.15.7 Technical Details

Each entered and validated shipping- and billing address address is associated with the current cart. This means that the given addresses then are used while fulfilling the purchasing step. Additionally, each address belongs to the customer which entered it. If multiple addresses are enabled, then **django-SHOP** assigns a priority to each of the entered addresses in ascending order. A customer then can select one of a previously entered address.

4.15.8 Further Reading

A good introduction on which fields to use where and when in addresses can be found at <http://www.uxmatters.com/mt/archives/2008/06/international-address-fields-in-web-forms.php>

4.16 Notifications

Whenever the status in model `Order` changes, the built-in Finite State Machine emits a signal using Django's [signaling framework](#). These signals are received by **django-SHOP**'s Notification Framework.

4.16.1 Notification Admin

In Django's admin backend on **Start > Shop > Notification**, the merchant can configure which email to send to whom, depending on each of the emitted events. When adding or editing a notification, we get a form mask with four input fields:

Notification Identifier

An arbitrary name used to distinguish the different notifications. It's up to the merchant to choose a meaningful name, "Order confirmed, paid with PayPal" could for instance be a good choice.

Event Type

Each *Order Workflows* declares a set of transition targets. For instance, the class `PayInAdvanceWorkflowMixin` declares these targets: "*Awaiting a forward fund payment*", "*Prepayment deposited*" and "*No Payment Required*".

The merchant can attach a notification for each of these transition targets. Here he must choose one from the prepared collection.

The Recipient

Transitions events are transmitted for changes in the order status. Each order belongs to one customer, and normally he's the first one to be informed, if something changes.

But other persons in the context of this e-commerce site might also be interested into a notification. In **django-SHOP** all staff Users qualify, as it is assumed that they belong to the group eligible to manage the site.

Email Templates

From the section **Start > Post Office > Email Templates**, choose on of the *Templates for Emails*.

Notification attachments

Choose none, one or more static files to be attached to each email. This typically is a PDF with the terms and conditions. We normally want to send them only to our customers, but not to the staff users, otherwise we'd fill up their mail inbox with countless attachments.

4.16.2 Post Office

Emails for order confirmations are sent asynchronously by **django-SHOP**. The reason for this is that it sometimes takes a few seconds for an application server to connect via SMTP, and deliver an Email. It is unacceptable to do this synchronously during the most sensitive phase of a purchase operation.

Therefore **django-SHOP** sends all generated emails using the queuing mail system **Post Office**. This app can hold a set of different email templates, which use the same template language as Django itself. Emails can be rendered using plain text, HTML or both.

When emails are queued, the chosen template object is stored side by side with its context serialized as JSON. These queued emails are accessible in Django's admin backend at **Start > Post Office > Emails**. Their status can either be "queued", "sent" or "failed".

As an offline operation, `./manage.py send_queued_mail` renders and sends queued emails to the given recipient. During this step, the given template is rendered applying the stored context. Their status then changes to "sent", or in case of a problem to "failed".

If **django-SHOP** is configured to run in a multilingual environment, post office renders the email in the language used during order creation.

Templates for Emails

The **Message** fields can contain any code, which is valid for Django templates. Frequently, a summary of the order is rendered in these emails, creating a list of ordered items. This list often is common across all email templates, and therefore it is recommended to prepare it in a base template for being reused. In the merchants project folder, create those base email templates inside the folder `templates/myshop/email/...`. Then inside the **Message** fields, these templates can be loaded and expanded using the well known `templatetag`

```
{% extends "myshop/email/somebase.html" %}
```

Caveats when using an HTML Message

Displaying HTML in email clients is a pain. Nobody really can say, which HTML tags are allowed in which client – and there are many email readers out there, far more than Internet browsers.

Therefore when designing HTML templates for emails, one must be really, really conservative. It may seem anachronistic, but still a best practice is to use the `<table>` element, and if necessary, nest it into their `<td>` (tables data) elements. Moreover, use inline styles rather than a `<style>` element containing blocks of CSS. It is recommended to use a special **email framework** to avoid nasty quirks, when rendering the templates.

Images can be embedded into HTML emails using two different methods. One is to host the image on the web-server and to build an absolute URI referring it. Therefore **django-SHOP** enriches the object `RenderContext` with the base URI for that web-site and stores it as context variable named `ABSOLUTE_BASE_URI`. For privacy reasons, most email clients do not load externally hosted images by default – the customer then must actively request to load them from the external sources.

Another method for adding images to HTML emails is to inline their payload. This means that images, instead of referring them by URI, are inlined as a base64-encoded string. **Easy-thumbnails** offers a template filter named `data_uri` to perform this operation. This of course blows up the overall size of an email and shall only be used for small an medium sized images.

4.17 REST Serializers

Good application programming style is to strictly separate of *Models*, *Views* and *Controllers*. In typical classic Django jargon, *Views* act as, what outsiders normally denote a controller.

Controllers can sometimes be found on the server and sometimes on the client. In **django-SHOP** a significant portion of the controller code is written in JavaScript in the form of Angular *directives*.

Therefore, all data exchange between the *View* and the *Model* must be performed in a serializable format, namely JSON. This allows us to use the same business logic for the server, as well as for the client. It also means, that we could create native mobile apps, which communicate with a web-application, without ever seeing a line of HTML code.

Moreover, since **django-SHOP** uses **django-CMS** to organize all available components, a classic Django “View” does not make much sense anymore. Therefore, as we evolve our Model-View-Control pattern into a modern web application, our REST serializers become the new controllers.

4.17.1 From a Database Model to the Serializer

As we already know, all database models from the **django-SHOP** framework are owned by the merchant implementation. Model serializers reflect their content and hence are tightly coupled with them. We therefore must be able to create our own serializers in a way similar to how we extend our database models. This means that we have a set of base serializers, which perform the task required by their basic counterpart models. Thus, if we extend these models, we normally also might want to extend their serializers.

4.17.2 Every URL is a REST endpoint

Every URL which is part of **django-SHOP**, namely the product’s list and detail views, the cart and checkout views, the order list and detail views, they all are REST endpoints. What does that mean?

Catalog List View

Say, we are working with the provided demo shop, then the product’s list view is available at <http://localhost:8000/de/shop/>. By appending `?format=json` to the URL, the raw data making up our product list, is rendered as a JSON object. For humans, this is difficult to read, therefore the Django Restframework offers a version which is more legible: Instead of the above, we invoke the URL as <http://localhost:8000/de/shop/?format=api>. This renders the list of products as:

GET

« 1 2 3 4 »

```
{
  "count": 47,
  "next": "http://localhost:8089/de/shop/?format=api&offset=12",
  "previous": null,
  "results": [
    {
      "id": 50,
      "product_name": "Apple iPhone 5",
      "product_url": "/de/shop/smart-phones/apple-iphone-5",
      "product_type": "Smart Phone",
      "product_model": "smartphonemodel",
      "price": "€ 239,00",
      "media": "`, and we certainly want to resize it using `easy-thumbnails` with `Pillow` before it is delivered. An easy way to solve this problem is to use the `SerializerMethodField`. Simply extend the above class to:

```
1 from rest_framework.serializers import SerializerMethodField
2
3 class ProductSummarySerializer(ProductSerializer):
4 media = SerializerMethodField()
5
6 def get_media(self, product):
7 return self.render_html(product, 'media')
```

As you might expect, `render_html` assigns a HTML snippet to the field `media` in the serialized representation of our product. This method uses a template to render the HTML. The name of this template is constructed using the following rules:

1. Look for a folder named according to the project's name, ie. `settings.SHOP_APP_LABEL` in lower case. If no such folder can be found, then use the folder named `shop`.
2. Search for a subfolder named `products`.
3. Search for a template named `"label-product_type-postfix.html"`. These three subfields are determined using the following rule:
  - *label*: the component of the shop, for instance `catalog`, `cart`, `order`.
  - *product\_type*: the class name in lower case of the product's Django model, for instance `smartcard`, `smartphone` or if no such template can be found, just `product`.
  - *postfix*: This is an arbitrary name passed in by the rendering function. As in the example above, this is the string `media`.

---

**Note:** It might seem *un-RESTful* to render HTML snippets by a serializer and deliver them via JSON to the client. However, we somehow must re-size the images assigned to our product to fit into the layout of our list view. The easiest way to do this in a configurable manner is to use the `easy-thumbnails` library and its `templatetag` `{% thumbnail product.sample_image ... %}`.

---

The template to render the media snippet could look like:

Listing 20: myshop/products/catalog-smartcard-media.html

```
{% load i18n thumbnail djng_tags %}
{% thumbnail product.sample_image 100x100 crop as thumb %}

```

The template of the products list view then may contain a list iteration such as:

```
{% for product in data.results %}
<div class="shop-list-item">

 <h4>{{ product.product_name }}</h4>
 {{ product.media }}
 {% trans "Price" %}: {{ product.price }}

</div>
{% endfor %}
```

The tag `{{ product.media }}` inserts the HTML snippet as prepared by the serializer from above. A serializer may add more than one `SerializerMethodField`. This can be useful, if the list view shall render different product types using different snippet templates.

### Catalog Detail View

By following a URL of a product's detail view, say `http://localhost:8000/de/shop/smart-phones/apple-iphone-5?format=api`, one may check the legible representation such as:

# Product Retrieve

OPTIONS

GET



View responsible for rendering the products details.  
Additionally an extra method as shown in products lists, cart lists  
and order item lists.

```
GET /de/shop/smart-phones/apple-iphone-5?format=api
```

```
HTTP 200 OK
Content-Type: application/json
Vary: Accept
Allow: GET, HEAD, OPTIONS

{
 "product": {
 "product_name": "Apple iPhone 5",
 "created_at": "2015-12-03T17:48:14.508000Z",
 "updated_at": "2015-12-09T10:22:12.013000Z",
 "availability": [
 [
 true,
 "9999-12-31T23:59:59.999"
]
],
 "price": "€ 239,00",
 "polymorphic_ctype": 110,
 "id": 50,
 "cms_pages": [
 22,
 20
],
 "images": [
 77,
 78
],
 "order": 1,
 "slug": "apple-iphone-5",
 "manufacturer": 7
 }
}
```

## Routing to these endpoints

Since we are using CMS pages to display the catalog's list view, we must provide an [apphook](#) which must be attached to this page. Since these catalog apphooks can vary in many ways they are not part of the shop framework, but must be created and added to the project as the *Create the CatalogListApp*.

## Catalog List View

The `urlpatterns` matching the regular expression `^$` routes onto the catalog list view class `shop.views.catalog.CMSPageProductListView` passing in a special serializer class, for example `myshop.serializers.ProductSummarySerializer`. This has been customized to represent our product models in our catalog templates. Since the serialized data now is available as a Python dictionary or as a plain Javascript object, these templates then can be rendered by the Django template engine, as well as by the client using for instance AngularJS.

This View class, which inherits from `rest_framework.generics.ListAPIView` accepts a list of filters for restricting the list of items.

As we (ab)use CMS pages as categories, we somehow must assign them to our products. Therefore our example project assigns a many-to-many field named `cms_pages` to our Product model. Using this field, the merchant can assign each product to one or more CMS pages, using the apphook `Catalog List`.

This special `filter_backend`, `shop.rest.filters.CMSPagesFilterBackend`, is responsible for restricting selected products on the current catalog list view.

## Catalog Detail View

The `urlpatterns` matching the regular expression `^(?P<slug>[\w-]+)$` routes onto the class `shop.views.catalog.ProductRetrieveView` passing in a special serializer class, `myshop.serializers.ProductDetailSerializer` which has been customized to represent our product model details.

This View class inherits from `rest_framework.generics.RetrieveAPIView`. In addition to the given `serializer_class` it can accept these fields:

- `lookup_field`: Model field to look up for the retrieved product. This defaults to `slug`.
- `lookup_url_kwarg`: URL argument as used by the matching RegEx. This defaults to `slug`.
- `product_model`: Restrict to products of this type. Defaults to `ProductModel`.

## Add Product to Cart

The product detail view requires another serializer, the so called `AddToCartSerializer`. This serializer is responsible for controlling the number of items being added to the cart and gives feedback on the subtotal of that potential cart item.

By appending the special string `add-to-cart` to the URL of a product's detail view, say <http://localhost:8000/de/shop/smart-phones/apple-iphone-5/add-to-cart?format=api>, one may check the legible representation of this serializer:

# Add To Cart

OPTIONS

GET



Handle the "Add to Cart" dialog on the products detail page.

POST /de/shop/smartcards/sdxc-card-64gb/add-to-cart

HTTP 202 Accepted  
 Content-Type: application/json  
 Vary: Accept  
 Allow: GET, POST, HEAD, OPTIONS

```
{
 "quantity": 3,
 "unit_price": "€ 13,99",
 "subtotal": "€ 41,97",
 "product": 5,
 "extra": {
 "product_code": "1004"
 }
}
```

Raw data

HTML form

Quantity

3

POST

This serializer is slightly different than the previous ones, because it not only serializes data and sends it from the server to the client, but it also deserializes data submitted from the client back to the server using a post-request. This normally is the quantity, but in more elaborated use cases, it also could contain attributes to distinguish product variations. The `AddSmartPhoneToCartSerializer` for example, uses this pattern.

Since we may create our own *Add this Product to Cart Serializer* for each product type in our shop, hence overriding its functionality with a customized implementation, such a serializer may return any other information relevant to the customer. This could for instance be a rebate or just an update of the availability.

## Cart and Checkout Views

CMS pages containing forms to edit the cart and the checkout views, do not require any URL routing, because their HTML is rendered by the CMS plugin system, whereas form submissions are handled by hard coded REST endpoints. These URLs are exclusively used by Ajax requests and never visible in the URL line of our browser. Those endpoints are configured by adding them to the root resolver at a project level:

Listing 21: myshop/urls.py

```
urlpatterns = [
 ...
 url(r'^shop/', include('shop.urls', namespace='shop')),
 ...
]
```

The serializers of the cart then can be accessed at <http://localhost:8000/shop/api/cart/> , those of the watch-list at <http://localhost:8000/shop/api/watch/> and those handling the various checkout forms at <http://localhost:8000/shop/api/checkout/> . Accessing these URLs can be useful, specially when debugging JavaScript code.

### Order List and Detail Views

The Order List and Detail Views must be accessible through a CMS page, therefore we need a speaking URL. This is similar to the Catalog List View. This means that the Order Views require the [apphook](#) named “*View Orders*”, which must be configured in the advanced settings of the Order’s CMS pages. This apphook is shipped with **django-SHOP** itself and can be found at `shop/cms_apps.py`.

As with all other Views used by **django-SHOP**, the content of this View can also be rendered in its dictionary structure, instead of HTML. Just append `?format=api` to the URL and get the Order details. In our myshop example this may look like:

# Order

OPTIONS

GET



Base View class to render the fulfilled orders for the current user.

```
GET /en/info/your-orders/5?format=api
```

```
HTTP 200 OK
Expires: Sat, 23 Jan 2016 21:49:51 GMT
Vary: Accept
Last-Modified: Sat, 23 Jan 2016 21:49:51 GMT
Allow: GET, HEAD, OPTIONS
Cache-Control: no-cache, no-store, must-revalidate, max-age=0
Content-Type: application/json

{
 "number": "2016-00005",
 "url": "/de/info/ihre-bestellungen/5",
 "status": "Packing goods",
 "subtotal": "€ 247.49",
 "total": "€ 252.49",
 "items": [
 {
 "line_total": "€ 239.00",
 "unit_price": "€ 239.00",
 "summary": {
 "id": 50,
 "product_name": "Apple iPhone 5",
 "product_url": "/en/shop/smart-phones/apple-iphone-5",
 "product_type": "Smart Phone",
 "product_model": "smartphonemodel",
 "price": "€ 239.00",
 "media": "<div class='media-left'>
 "description": "see 'media'"
 },
 "product_name": "Apple iPhone 5",
 "product_code": "12016",
 "_unit_price": "239.00",
 "_line_total": "239.00",
 "extra": {
 "storage": 16,
 "rows": [],
 "product_code": "12016"
 },
 "quantity": 1,
 "order": 5,
 "product": 50
 },
 {
 "line_total": "€ 8.49",
```

## Search Result Views

As with the Order View, also the Search Results View is accessible through a CMS page. Say, a search query directed us to <http://localhost:8000/en/search/?q=iphone>, then the content of this query can be made visible by adding `&format=api` to this URL and get the results in its dictionary structure. This is specially useful to test if a customized search serializer returns the expected results. In our myshop example this may look like:



# Search

OPTIONS

GET

A generic view to be used for rendering the result list while searching.

```
GET /en/search/?q=iphone&format=api
```

```
HTTP 200 OK
```

```
Content-Type: application/json
```

```
Vary: Accept
```

```
Allow: GET, HEAD, OPTIONS
```

```
{
 "count": 1,
 "next": null,
 "previous": null,
 "results": [
 {
 "price": "€ 239.00",
 "media": "<div class=\"media-left\"><
 "product_url": "/en/shop/smart-phones/apple-iphone-5",
 "product_name": "Apple iPhone 5"
 }
]
}
```

## 4.17.3 Final Note

In previous versions of **django-SHOP**, these kinds of controller implementations had to be implemented by customized Django View classes. This programming pattern led to bloated code, because the programmer had to do a case distinction, whether the request was of type GET, POST or some kind of Ajax. Now **django-SHOP** is shipped with reusable View classes, and the merchant's implementation must focus exclusively on serializers. This is much easier, because it separates the business logic from the underlying request-response-cycle.

## 4.18 Client Side Framework

While Django doesn't impose any client side framework, **django-SHOP** has to. Here we have to consider that it is unrealistic to expect that an e-commerce site could operate without any client-side JavaScript. For instance, during checkout the customer must be able to edit the cart interactively. We also might want to offer autocompletion and infinite scroll.

Therefore the authors of **django-SHOP** have decided to add reusable JavaScript components. Here the most obvious choice would have been jQuery, since it is used by the Django administration backend. However by using jQuery, web designers adopting templates for their **django-SHOP** implementation would inevitably have to write JavaScript code themselves. In order to prevent this, another popular client-side framework has been chosen: [AngularJS](#).

This means that template designers only have to add shop specific HTML elements. All these [directives](#) are provided by the **django-SHOP** framework. Frontend developers therefore do not have to add or adopt any JavaScript code, except for the initialization.

**Note:** Since **django-SHOP** uses REST for every part of the communication, the client side framework can be replaced by whatever appropriate.

### 4.18.1 Initialize the Application

As with any application, also the client side must be initialized. This in AngularJS is done straight forward. Change the outermost HTML element, which typically is the `<html>` tag, to

```
<html ng-app="myShop">
```

somewhere in this file, include the JavaScript files required by Angular.

For a better organization of the included files, it is strongly recommended to use `django-sekizai` as assets manager:

```
{% load static sekizai_tags %}

{% addtoblock "js" %}<script src="{% static 'node_modules/angular/angular.min.js' %}"
↳type="text/javascript"></script>{% endaddtoblock %}
{% addtoblock "js" %}<script src="{% static 'node_modules/angular-sanitize/angular-
↳sanitize.min.js' %}"></script>{% endaddtoblock %}
{% addtoblock "js" %}<script src="{% static 'node_modules/angular-i18n/angular-locale_
↳de.js' %}"></script>{% endaddtoblock %}
{% addtoblock "js" %}<script src="{% static 'node_modules/angular-animate/angular-
↳animate.min.js' %}"></script>{% endaddtoblock %}
{% addtoblock "js" %}<script src="{% static 'node_modules/angular-messages/angular-
↳messages.min.js' %}"></script>{% endaddtoblock %}
```

Before the closing `</body>`-tag, we then combine those includes and initialize the client side application. Say, we declare a base template for our project:

Listing 22: myshop/pages/base.html

```
{% load djng_tags sekizai_tags %}
<body>
...
{% render_block "js" postprocessor "compressor.contrib.sekizai.compress" %}
<script type="text/javascript">
angular.module('myShop', ['ngAnimate', 'ngMessages', 'ngSanitize', {% with_data "ng-
↳requires" as ng_requires %}
 {% for module in ng_requires %}'{{ module }}'{% if not forloop.last %}, {% endif
↳%}{% endfor %}{% end_with_data %}
])
.config(['$httpProvider', function($httpProvider) {
 $httpProvider.defaults.headers.common['X-CSRFToken'] = '{{ csrf_token }}';
 $httpProvider.defaults.headers.common['X-Requested-With'] = 'XMLHttpRequest';
}])
.config(['$locationProvider', function($locationProvider) {
 $locationProvider.html5Mode(false);
}])
{% with_data "ng-config" as configs %}
 {% for config in configs %}.config({{ config }}){% endfor %};
{% end_with_data %}
</script>

</body>
```

By using Sekizai's `templatetag render_block` inside the initialization and configuration phase of our Angular application, we can delegate the dependency resolution to template expansion and inclusion.

For example, the editable cart requires its own AngularJS module, found in a separate JavaScript file. Since we honor the principle of encapsulation, we only want to include and initialize that module if the customer loads the view to alter the cart. Here the template for our editable cart starts with:

Listing 23: shop/cart/editable.html

```
{% load static sekizai_tags %}

{% addtoblock "js" %}<script src="{% static 'shop/js/cart.js' %}" type="text/
→ javascript"></script>{% endaddtoblock %}
{% add_data "ng-requires" "django.shop.cart" %}
```

Sekizai then collects the content added to these `add_data` templatetags, and renders them using the `with_data` statements shown above. This concept allows us to delegate dependency resolution and module initialization to whom it concerns.

### 4.18.2 Angular Modules

The **django-SHOP** framework declares a bunch of Angular directives and controllers, grouped into separate modules. All these modules are placed into their own JavaScript files for instance `static/shop/js/auth.js`, `static/shop/js/cart.js`, `static/shop/js/catalog.js`, etc. and use a corresponding but unique naming scheme, to avoid conflicts with other third party AngularJS modules. The naming scheme for these three modules is unsurprisingly: `django.shop.auth`, `django.shop.cart`, `django.shop.catalog`, etc.

This is where Sekizai's `{% with_data "ng-requires" as ng_requires %}` becomes useful. We now can manage our AngularJS dependencies as:

```
angular.module('myShop', [/* other dependencies */
{% with_data "ng-requires" as ng_requires %}
 {% for module in ng_requires %}'{{ module }}'{% if not forloop.last %}, {% endif
→ %}}{% endfor %}
{% end_with_data %}])
```

By adding Sekizai's `{% with_data "ng-config" as configs %}` templatetag, we can add arbitrary configuration code:

```
angular.module('myShop', [/* module dependencies */
){% with_data "ng-config" as configs %}
 {% for config in configs %}.config({{ config }}){% endfor %};
{% end_with_data %}
```

The templatetags `{% with_data "ng-requires" ... %}` and `{% with_data "ng-config" ... %}` work, because some other template snippets declare `{% add_data "ng-requires" ... %}` and/or `{% add_data "ng-config" ... %}`. Sekizai then collects these declarations and combines them in `with_data`.

Unless additional client functionality is required, these are the only parts where our project requires us to write JavaScript.

## 4.19 Configuration and Settings

The **django-SHOP** framework itself, requires only a few configuration directives. However, since each e-commerce site built around **django-SHOP** consists of the merchant's own project, plus a collection of third party Django apps, here is a summary of mandatory and some optional configuration settings:

### 4.19.1 Django-SHOP specific settings

#### App Label

This label is required internally to configure the name of the database tables used in the merchant's implementation.

```
SHOP_APP_LABEL = 'myshop'
```

There is no default setting.

#### Site Framework

You should always activate Django's site framework and set a default for

```
SITE_ID = 1
```

#### Alternative User Model

Django's built-in User model lacks a few features required by **django-SHOP**, mainly the possibility to use the email address as the login credential. This overridden model is 100% field compatible to Django's internal model and even reuses its own database table, namely `auth_user`.

```
AUTH_USER_MODEL = 'email_auth.User'
```

Since this user model intentionally does not enforce uniqueness on the email address, Django would complain if we do not silence this system check:

```
SILENCED_SYSTEM_CHECKS = ['auth.W004']
```

For further information, please refer to the *Customer Model* documentation.

#### Authentication Backends

```
AUTHENTICATION_BACKENDS = [
 'django.contrib.auth.backends.ModelBackend',
 'allauth.account.auth_backends.AuthenticationBackend',
]
```

#### Currency

Unless Money types are specified explicitly, each project requires a default currency:

```
SHOP_DEFAULT_CURRENCY = 'EUR'
```

The typical format to render an amount is \$ 1.23, but some merchant may prefer 1.23 USD. By using the configuration setting:

```
SHOP_MONEY_FORMAT = '{symbol} {amount}'
```

we may specify our own money rendering format, where `{symbol}` is €, \$, £, etc. and `{currency}` is EUR, USD, GBP, etc.

Unless amounts never reach a thousand, it is advised to activate a separator for better readability.

```
USE_THOUSAND_SEPARATOR = True
```

Outside of the US, it generally is a good idea to activate localization for numeric types.

```
USE_L10N = True
```

## Cart Modifiers

Each project requires at least one cart modifier in order to initialize the cart. In most implementations `shop.modifiers.defaults.DefaultCartModifier` is enough, but depending on the product models, the merchant's may implement an alternative.

To identify the taxes in the cart, use one of the provided tax modifiers or implement a customized one.

Other modifiers may add extra payment and shipping costs, or rebate the total amount depending on whatever appropriate.

```
SHOP_CART_MODIFIERS = [
 'shop.modifiers.defaults.DefaultCartModifier',
 'shop.modifiers.taxes.CartExcludedTaxModifier',
 # other modifiers
]
```

For further information, please refer to the *Cart Modifiers* documentation.

## Installed Django Applications

This is a configuration known to work. Special and optional apps are discussed below.

```
INSTALLED_APPS = [
 'django.contrib.auth',
 'email_auth',
 'polymorphic',
 'django.contrib.contenttypes',
 'django.contrib.sessions',
 'django.contrib.sites',
 'djangocms_admin_style',
 'django.contrib.admin',
 'django.contrib.staticfiles',
 'django.contrib.sitemaps',
 'djangocms_text_ckeditor',
 'django_select2',
 'cmsplugin_cascade',
 'cmsplugin_cascade.clipboard',
 'cmsplugin_cascade.sharable',
 'cmsplugin_cascade.extra_fields',
 'cmsplugin_cascade.segmentation',
 'cms_bootstrap3',
 'adminsortable2',
 'rest_framework',
 'rest_framework.authtoken',
 'rest_auth',
 'django_fsm',
 'fsm_admin',
 'djng',
]
```

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```
'cms',
'menus',
'treebeard',
'compressor',
'sekizai',
'sass_processor',
'django_filters',
'filer',
'easy_thumbnails',
'easy_thumbnails.optimize',
'parler',
'post_office',
'haystack',
'shop',
'my_shop_implementation',
]
```

- `email_auth` optional but recommended, overrides the built-in authentication. It must be located after `django.contrib.auth`.
- `polymorphic` only required, if the site requires more than one type of product model. It presumes that `django-polymorphic` is installed.
- `djangoCMS_text_ckeditor` optionally adds a WYSIWYG HTML editor which integrates well with **django-CMS**.
- `django_select2` optionally adds a select field to Django's admin, with integrated autocompletion. Very useful for adding links to products manually. It presumes that `django-select2` is installed.
- `cmsplugin_cascade` adds the functionality to add CMS plugins, as provided by **django-SHOP**, to arbitrary CMS placeholders. This setting including submodules can be removed, if all templates are created manually.
- `cmsplugin_cascade.clipboard` allows the site administrator to copy a set of plugins in one installation and paste it into the placeholder of another one.
- `cmsplugin_cascade.sharable` allows the site administrator to share a preconfigurable set of plugin attributes into an alias, to be reused by many plugins of the same type.
- `cmsplugin_cascade.extra_fields` allows the site administrator to add arbitrary CSS classes, styles and ID-fields to entitled plugins.
- `cmsplugin_cascade.segmentation` allows to segment a set of plugins into logical units.
- `cms_bootstrap3` adds some templates and templatetags to render Bootstrap 3 styled menus and navigation bars.
- `adminsortable2` allows the site administrator to sort various items in Django's administration backend.
- `rest_framework`, `rest_framework.authtoken` and `rest_auth`, required, add the REST functionality to the **django-SHOP** framework.
- `django_fsm` and `fsm_admin`, required, add the Finite State Machine to the **django-SHOP** framework.
- `djng` only required for installations using AngularJS, which is the recommended JavaScript framework. It adds the interface layer between Django and AngularJS and presumes that `django-angular` is installed.
- `cms`, `menus` and `treebeard` are required if **django-SHOP** is used in combination with **djangoCMS**.
- `compressor`, highly recommended. Concatenates and minifies CSS and JavaScript files on production systems. It presumes that `django-compressor` is installed.

- `sekizai`, highly recommended, allows the template designer to group CSS and JavaScript file includes. It presumes that `django-sekizai` is installed.
- `sass_processor`, optional but recommended, used to convert SASS into pure CSS together with debugging information. It presumes that `django-sass-processor` is installed.
- `django_filters`, optionally used to filter products by their attributes using request parameters.
- `filer`, highly recommended, manage your media files in Django. It presumes that `django-filer` is installed.
- `easy_thumbnails` and `easy_thumbnails.optimize`, highly recommended, handle thumbnail generation and optimization. It presumes that `easy-thumbnails` is installed.
- `parler` is an optional framework which handles the translation of models fields into other natural languages.
- `post_office` highly recommended. An asynchronous mail delivery application which does not interrupt the request-response cycle when sending mail.
- `haystack` optional, handles the interface between Django and Elasticsearch – a full-text search engine. It presumes a running and available instance of ElasticSearch and that `django-haystack` and `drf-haystack` is installed.
- shop the **django-SHOP** framework.
- `my_shop_implementation` replace this by the merchant's implementation of his shop.

## Middleware Classes

This is a configuration known to work. Special middleware classes are discussed below.

```
MIDDLEWARE_CLASSES = (
 'djng.middleware.AngularUrlMiddleware',
 'django.contrib.sessions.middleware.SessionMiddleware',
 'django.middleware.csrf.CsrfViewMiddleware',
 'django.contrib.auth.middleware.AuthenticationMiddleware',
 'shop.middleware.CustomerMiddleware',
 'django.contrib.messages.middleware.MessageMiddleware',
 'django.middleware.locale.LocaleMiddleware',
 'django.middleware.common.CommonMiddleware',
 'django.middleware.gzip.GZipMiddleware',
 'shop.middleware.MethodOverrideMiddleware',
 'cms.middleware.language.LanguageCookieMiddleware',
 'cms.middleware.user.CurrentUserMiddleware',
 'cms.middleware.page.CurrentPageMiddleware',
 'cms.middleware.toolbar.ToolbarMiddleware',
)
```

- `djng.middleware.AngularUrlMiddleware` adds a special router, so that we can use Django's reverse function from inside JavaScript. Only required in conjunction with `django-angular`.
- `shop.middleware.CustomerMiddleware` add the Customer object to each request.
- `shop.middleware.MethodOverrideMiddleware` transforms PUT requests wrapped as POST requests back into the PUT method. This is required for compatibility with some JS frameworks and proxies.

## Static Files

If compressor and/or `sass_processor` are part of `INSTALLED_APPS`, add their finders to the list of the default `STATICFILES_FINDERS`:

```
STATICFILES_FINDERS = [
 'django.contrib.staticfiles.finders.FileSystemFinder',
 'django.contrib.staticfiles.finders.AppDirectoriesFinder',
 'sass_processor.finders.CssFinder',
 'compressor.finders.CompressorFinder',
]
```

**Django-SHOP** requires a few third party packages, which are not available from PyPI, they instead must be installed via `npm install`. In order to make these files available to our Django application, we use the configuration setting:

```
STATICFILES_DIRS = [
 ('node_modules', '/path/to/project/node_modules'),
]
```

Some files installed by `npm` are processed by `django-sass-processor` and hence their path must be made available:

```
NODE_MODULES_URL = STATIC_URL + 'node_modules/'

SASS_PROCESSOR_INCLUDE_DIRS = (
 os.path.join(PROJECT_ROOT, 'node_modules'),
)
```

- The string provided by `NODE_MODULES_URL` is used by the special function `get-setting()` in the provided SASS files.
- `SASS_PROCESSOR_INCLUDE_DIRS` extends the list of folders to look for `@import ...` statements in the provided SASS files.

## Template Context Processors

Templates rendered by the **django-SHOP** framework require some additional objects or configuration settings. Add them to each template using these context processors:

```
TEMPLATES = [{
 ...
 'OPTIONS': {
 'context_processors': (
 ...
 'shop.context_processors.customer',
 'shop.context_processors.ng_model_options',
),
 },
},
]
```

`shop.context_processors.customer` adds the `Customer` object to the rendering context.

`shop.context_processors.ng_model_options` adds the *AngularJS specific settings* to the rendering context.

## Configure the Order Workflow

The ordering workflow can be configured using a list or tuple of mixin classes.

```
SHOP_ORDER_WORKFLOWS = (
 'shop.payment.defaults.PayInAdvanceWorkflowMixin',
)
```

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```
'shop.shipping.defaults.CommissionGoodsWorkflowMixin',
other workflow mixins
)
```

This prevents to display all transitions configured by the workflow mixins inside the administration backend:

```
FSM_ADMIN_FORCE_PERMIT = True
```

## Email settings

Since **django-SHOP** communicates with its customers via email, having a working outgoing e-mail service is a fundamental requirement for **django-SHOP**. Adopt these settings to your configuration. Please remember that e-mail is sent asynchronously via `django-post_office`.

```
EMAIL_HOST = 'smtp.example.com'
EMAIL_PORT = 587
EMAIL_HOST_USER = 'no-reply@example.com'
EMAIL_HOST_PASSWORD = 'smtp-secret-password'
EMAIL_USE_TLS = True
DEFAULT_FROM_EMAIL = 'My Shop <no-reply@example.com>'
EMAIL_REPLY_TO = 'info@example.com'
EMAIL_BACKEND = 'post_office.EmailBackend'
```

## Session Handling

For performance reasons it is recommended to use a memory based session store such as Redis, rather than a database or disk based store.

```
SESSION_ENGINE = 'redis_sessions.session'
SESSION_SAVE_EVERY_REQUEST = True
SESSION_REDIS_PREFIX = 'myshop-session'
SESSION_REDIS_DB = 0
```

## Caching Backend

For performance reasons it is recommended to use a memory based cache such as Redis, rather than a disk based store. In comparison to memcached, Redis can invalidate cache entries using keys with wildcards, which is a big advantage in **django-SHOP**.

```
CACHES = {
 'default': {
 'BACKEND': 'redis_cache.RedisCache',
 'LOCATION': os.environ.get('REDIS_LOCATION', 'redis://localhost:6379/0'),
 'KEY_PREFIX': 'myshop-cache',
 },
}

CACHE_MIDDLEWARE_ALIAS = 'default'
CACHE_MIDDLEWARE_SECONDS = 3600
CACHE_MIDDLEWARE_KEY_PREFIX = 'myshop-cache'
```

## 4.19.2 Internationalisation Support

Always localize decimal numbers unless you operate your site in the United States:

```
USE_L10N = True
```

These settings for internationalisation are known to work in combination with [django-cms](#) and [django-parler](#).

```
USE_I18N = True

LANGUAGE_CODE = 'en'

LANGUAGES = [
 ('en', "English"),
 ('de', "Deutsch"),
]

PARLER_DEFAULT_LANGUAGE = 'en'

PARLER_LANGUAGES = {
 1: [
 {'code': 'de'},
 {'code': 'en'},
],
 'default': {
 'fallbacks': ['de', 'en'],
 },
}

CMS_LANGUAGES = {
 'default': {
 'fallbacks': ['en', 'de'],
 'redirect_on_fallback': True,
 'public': True,
 'hide_untranslated': False,
 },
 1: [{
 'public': True,
 'code': 'en',
 'hide_untranslated': False,
 'name': 'English',
 'redirect_on_fallback': True,
 }, {
 'public': True,
 'code': 'de',
 'hide_untranslated': False,
 'name': 'Deutsch',
 'redirect_on_fallback': True,
 },]
}
```

## REST Framework

The REST framework requires special settings. We namely must inform it how to serialize our special Money type:

```

REST_FRAMEWORK = {
 'DEFAULT_RENDERER_CLASSES': (
 'shop.rest.money.JSONRenderer',
 'rest_framework.renderers.BrowsableAPIRenderer',
),
 'DEFAULT_FILTER_BACKENDS': ('rest_framework.filters.DjangoFilterBackend',),
 'DEFAULT_PAGINATION_CLASS': 'rest_framework.pagination.LimitOffsetPagination',
 'PAGE_SIZE': 12,
}

SERIALIZATION_MODULES = {'json': 'shop.money.serializers'}

```

Since the client side is not allowed to do any price and quantity computations, Decimal values are transferred to the client using strings. This also avoids nasty rounding errors.

```
COERCE_DECIMAL_TO_STRING = True
```

## Django-CMS and Cascade settings

**Django-SHOP** requires at least one CMS template. Assure that it contains a placeholder able to accept

```

CMS_TEMPLATES = [
 ('myshop/pages/default.html', _("Default Page")),
]

CMS_PERMISSION = False

cascade_workarea_glossary = {
 'breakpoints': ['xs', 'sm', 'md', 'lg'],
 'container_max_widths': {'xs': 750, 'sm': 750, 'md': 970, 'lg': 1170},
 'fluid': False,
 'media_queries': {
 'xs': ['(max-width: 768px)'],
 'sm': ['(min-width: 768px)', '(max-width: 992px)'],
 'md': ['(min-width: 992px)', '(max-width: 1200px)'],
 'lg': ['(min-width: 1200px)'],
 },
}

CMS_PLACEHOLDER_CONF = {
 'Breadcrumbs': {
 'plugins': ['BreadcrumbsPlugin'],
 'parent_classes': {'BreadcrumbsPlugin': None},
 'glossary': cascade_workarea_glossary,
 },
 'Commodity Details': {
 'plugins': ['BootstrapContainerPlugin', 'BootstrapJumbotronPlugin'],
 'parent_classes': {
 'BootstrapContainerPlugin': None,
 'BootstrapJumbotronPlugin': None,
 },
 'glossary': cascade_workarea_glossary,
 },
 'Main Content': {
 'plugins': ['BootstrapContainerPlugin', 'BootstrapJumbotronPlugin'],
 'parent_classes': {

```

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```

 'BootstrapContainerPlugin': None,
 'BootstrapJumbotronPlugin': None,
 'TextLinkPlugin': ['TextPlugin', 'AcceptConditionPlugin'],
 },
 'glossary': cascade_workarea_glossary,
},
'Static Footer': {
 'plugins': ['BootstrapContainerPlugin',],
 'parent_classes': {
 'BootstrapContainerPlugin': None,
 },
 'glossary': cascade_workarea_glossary,
},
},
}

```

**Django-SHOP** enriches **djangoCMS-cascade** with a few shop specific plugins.

```

from cmsplugin_cascade.extra_fields.config import PluginExtraFieldsConfig

CMSPLUGIN_CASCADE_PLUGINS = [
 'cmsplugin_cascade.segmentation',
 'cmsplugin_cascade.generic',
 'cmsplugin_cascade.icon',
 'cmsplugin_cascade.link',
 'shop.cascade',
 'cmsplugin_cascade.bootstrap3',
]

CMSPLUGIN_CASCADE = {
 'link_plugin_classes': [
 'shop.cascade.plugin_base.CatalogLinkPluginBase',
 'cmsplugin_cascade.link.plugin_base.LinkElementMixin',
 'shop.cascade.plugin_base.CatalogLinkForm',
],
 'alien_plugins': ['TextPlugin', 'TextLinkPlugin', 'AcceptConditionPlugin'],
 'bootstrap3': {
 'template_basedir': 'angular-ui',
 },
 'plugins_with_sharables': {
 'BootstrapImagePlugin': ['image_shapes', 'image_width_responsive', 'image_
↪ width_fixed',
 'image_height', 'resize_options'],
 'BootstrapPicturePlugin': ['image_shapes', 'responsive_heights', 'image_size',
↪ 'resize_options'],
 },
 'bookmark_prefix': '/',
 'segmentation_mixins': [
 ('shop.cascade.segmentation.EmulateCustomerModelMixin', 'shop.cascade.
↪ segmentation.EmulateCustomerAdminMixin'),
],
 'allow_plugin_hiding': True,
}

```

Since we want to add arbitrary links onto the detail view of a product, **django-SHOP** offers a modified link plugin. This has to be enabled using the 3-tuple `link_plugin_classes`.

**Django-SHOP** uses AngularJS rather than jQuery to control its dynamic HTML widgets. We therefore have to

override the default with this settings: `CMSPLUGIN_CASCADE['bootstrap3']['template_basedir']`.

For a detailed explanation of these configuration settings, please refer to the documentation of [djangocms-cascade](#).

## CK Text Editor settings

By default, **django-CMS** uses the [CKEditor](#) plugin which can be heavily configured. Settings which have shown to be useful are:

```
CKEDITOR_SETTINGS_CAPTION = {
 'language': '{{ language }}',
 'skin': 'moono',
 'height': 70,
 'toolbar_HTMLField': [
 ['Undo', 'Redo'],
 ['Format', 'Styles'],
 ['Bold', 'Italic', 'Underline', '-', 'Subscript', 'Superscript', '-',
→ 'RemoveFormat'],
 ['Source']
],
}

CKEDITOR_SETTINGS_DESCRIPTION = {
 'language': '{{ language }}',
 'skin': 'moono',
 'height': 250,
 'toolbar_HTMLField': [
 ['Undo', 'Redo'],
 ['cmsplugins', '-', 'ShowBlocks'],
 ['Format', 'Styles'],
 ['TextColor', 'BGColor', '-', 'PasteText', 'PasteFromWord'],
 ['Maximize', ''],
 '/',
 ['Bold', 'Italic', 'Underline', '-', 'Subscript', 'Superscript', '-',
→ 'RemoveFormat'],
 ['JustifyLeft', 'JustifyCenter', 'JustifyRight'],
 ['HorizontalRule'],
 ['NumberedList', 'BulletedList', '-', 'Outdent', 'Indent', '-', 'Table'],
 ['Source']
],
}
```

## Media assets handling

**Django-CMS** and **django-SHOP** rely on [django-filer](#) in combination with [easy-thumbnails](#) to manage the media assets.

```
MEDIA_ROOT = '/path/to/project/media'

MEDIA_URL = '/media/'

FILER_ALLOW_REGULAR_USERS_TO_ADD_ROOT_FOLDERS = True

FILE_UPLOAD_MAX_MEMORY_SIZE = 5242880

THUMBNAIL_OPTIMIZE_COMMAND = {
```

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```
'gif': '/usr/bin/optipng {filename}',
'jpeg': '/usr/bin/jpegoptim {filename}',
'png': '/usr/bin/optipng {filename}'
}

THUMBNAIL_PRESERVE_EXTENSIONS = True

THUMBNAIL_PROCESSORS = [
 'easy_thumbnails.processors.colorspace',
 'easy_thumbnails.processors.autocrop',
 'filer.thumbnail_processors.scale_and_crop_with_subject_location',
 'easy_thumbnails.processors.filters',
]
```

all settings are explained in detail in the documentation of [django-filer](#) and [easy-thumbnails](#).

## Full Text Search

Presuming that you installed and run an [ElasticSearchEngine](#) server, configure Haystack:

```
HAYSTACK_CONNECTIONS = {
 'default': {
 'ENGINE': 'haystack.backends.elasticsearch_backend.ElasticsearchSearchEngine',
 'URL': 'http://localhost:9200/',
 'INDEX_NAME': 'my_prefix-en',
 },
}
```

If you want to index other natural language, say German, add another prefix:

```
HAYSTACK_CONNECTIONS = {
 ...
 'de': {
 'ENGINE': 'haystack.backends.elasticsearch_backend.ElasticsearchSearchEngine',
 'URL': 'http://localhost:9200/',
 'INDEX_NAME': 'my_prefix-de',
 }
}

HAYSTACK_ROUTERS = ('shop.search.routers.LanguageRouter',)
```

## AngularJS specific settings

The cart's totals are updated after an input field has been changed. For usability reasons it makes sense to [delay this](#), so that only after a certain time of inactivity, the update is triggered.

```
SHOP_ADD2CART_NG_MODEL_OPTIONS = "{updateOn: 'default blur', debounce: {'default': ↵
↵500, 'blur': 0}}"
```

This configuration updates the cart after changing the quantity and 500 milliseconds of inactivity or field blurring. It is used by the “Add to cart” form.

```
SHOP_EDITCART_NG_MODEL_OPTIONS = "{updateOn: 'default blur', debounce: {'default': ↵
↵2500, 'blur': 0}}"
```

This configuration updates the cart after changing any of the product's quantities and 2.5 seconds of inactivity or field blurring. It is used by the “Edit cart” form.

### Select2 specific settings

`django-select2` adds a configurable autocomplete field to the project.

Change the include path to a local directory, if you prefer to install the JavaScript dependencies via `npm` instead of relying on a preconfigured CDN:

```
SELECT2_CSS = 'node_modules/select2/dist/css/select2.min.css'
SELECT2_JS = 'node_modules/select2/dist/js/select2.min.js'
```

## 4.20 Shipping Providers

Unless you use the merchant management systems for delivery, **django-SHOP** provides some hooks to add shipping providers. Shipping providers require that the `Delivery` model is available, otherwise there is no way to keep track which items have been shipped with a delivery.

Version 0.13 has a complete and working implementation for a shipping provider.

### 4.21 Special CMS Pages

Besides the Catalog-, Cart- and Checkout Views, some pages must be accessed from already prepared templates, which are shipped with this framework. These templates use the `templatetag {% page_url %}` shipped by **django-CMS** with some hard coded IDs. Unless we want to rewrite those templates, we must provide a few special CMS pages, where we specify those page IDs.

#### 4.21.1 Customer Self Registering Page

The **django-SHOP** framework offers a plugin, which offers a form, where customers can enter their email address and a password. This plugin is named **Authentication** using the *Rendered Form: Register User*.

Sometimes

self-registering

**This page shall offer a form,** This plugin

In the **Advanced Settings** of the CMS page handling this form, use `shop-register-customer` as the page ID.

#### 4.21.2 Customer Details Page

This page shall offer a form, where a customer can enter his personal details, such as his or her names, email address and whatever else is interesting for the merchant.

## 4.22 Settings

These is the complete list of setting directives available for **django-SHOP**.

Usage in your own code:

```
from shop.conf import app_settings

print(app_settings.APP_LABEL)
```

---

**Note:** When using as shown here, you don't have to prefix the settings property with `SHOP_...`

---

**class** `shop.conf.DefaultSettings`

### **SHOP\_APP\_LABEL**

The name of the project implementing the shop, for instance `myshop`.

This is required to assign the abstract shop models to a project. There is no default.

### **SHOP\_DEFAULT\_CURRENCY**

The default currency this shop is working with. The default is `EUR`.

---

**Note:** All model- and form input fields can be specified for any other currency, this setting is only used if the supplied currency is missing.

---

### **SHOP\_VENDOR\_EMAIL**

The vendor's email addresses, unless specified through the `Order` object.

### **SHOP\_MONEY\_FORMAT**

When rendering an amount of type `Money`, use this format.

Possible placeholders are:

- `{symbol}`: This is replaced by €, \$, £, etc.
- `{currency}`: This is replaced by Euro, US Dollar, Pound Sterling, etc.
- `{code}`: This is replaced by EUR, USD, GBP, etc.
- `{amount}`: The localized amount.
- `{minus}`: Only for negative amounts, where to put the – sign.

For further information about formatting currency amounts, please refer to <https://docs.microsoft.com/en-us/globalization/locale/currency-formatting>

### **SHOP\_DECIMAL\_PLACES**

Number of decimal places for the internal representation of a price. This is purely used by the Django admin and is not the number of digits visible by the customer.

Defaults to 2.

### **SHOP\_CUSTOMER\_SERIALIZER**

Depending on the materialized customer model, use this directive to configure the customer serializer.

Defaults to `shop.serializers.defaults.customer.CustomerSerializer`.



**SHOP\_PRODUCT\_SUMMARY\_SERIALIZER**

Serialize the smallest common denominator of all Product models available in this shop. This serialized data then is used for Catalog List Views, Cart List Views and Order List Views.

Defaults to `shop.serializers.defaults.product_summary.ProductSummarySerializer`.

**SHOP\_PRODUCT\_SELECT\_SERIALIZER**

This serializer is only used by the plugin editors, when selecting a product using a drop down menu with auto-completion.

Defaults to `shop.serializers.defaults.ProductSelectSerializer`.

**SHOP\_MAX\_PURCHASE\_QUANTITY**

The default maximum number of items a customer can add to his cart per product type.

**SHOP\_SELL\_SHORT\_PERIOD**

The time period (in seconds or timedelta) from the current timestamp, in which a product is considered available, although it currently is not in stock, but scheduled to be added to the inventory.

**SHOP\_LIMITED\_OFFER\_PERIOD**

The time period (in seconds or timedelta) from the current timestamp, in which a product is marked as limited time offer.

**SHOP\_LINK\_TO\_EMPTY\_CART**

If `True` the link on the cart-icon pointing to the cart is enabled, even if there are no items are in the cart.

**SHOP\_ORDER\_ITEM\_SERIALIZER**

Depending on the materialized OrderItem model, use this directive to configure the serializer.

Defaults to `shop.serializers.defaults.OrderItemSerializer`.

**SHOP\_CART\_MODIFIERS**

Specifies the list of *Cart Modifiers*. They are applied on each cart item and the cart final sums.

This list typically starts with `'shop.modifiers.defaults.DefaultCartModifier'` as its first entry, followed by other cart modifiers.

**SHOP\_VALUE\_ADDED\_TAX**

Use this convenience settings if you can apply the same tax rate for all products and you use one of the default tax modifiers `shop.modifiers.taxes.CartIncludeTaxModifier` or `shop.modifiers.taxes.CartExcludedTaxModifier`.

If your products require individual tax rates or you ship into states with different tax rates, then you must provide your own tax modifier.

**SHOP\_ORDER\_WORKFLOWS**

Specifies a list of *Order Workflows*. Order workflows are applied after an order has been created and conduct the vendor through the steps of receiving the payments until fulfilling the shipment.

**SHOP\_ADD2CART\_NG\_MODEL\_OPTIONS**

Used to configure the update behavior when changing the quantity of a product, in the product's detail view after adding it to the cart. For more information refer to the documentation of the *NgModelOptions* directive in the AngularJS reference.

**SHOP\_EDITCART\_NG\_MODEL\_OPTIONS**

Used to configure the update behavior when changing the quantity of a cart item, in the cart's edit view. For more information refer to the documentation of the *NgModelOptions* directive in the AngularJS reference.

**SHOP\_GUEST\_IS\_ACTIVE\_USER**

If this directive is `True`, customers which declared themselves as guests, may request a password reset,

so that they can log into their account at a later time. Then it also makes sense to set the `email` field in model `email_auth.User` as unique.

The default is `False`.

#### **SHOP\_OVERRIDE\_SHIPPING\_METHOD**

If this directive is `True`, the merchant is allowed to override the shipping method the customer has chosen while performing the checkout.

Note that if alternative shipping is more expensive, usually the merchant has to come up for the additional costs.

The default is `False`.

#### **SHOP\_CACHE\_DURATIONS**

In the product's list views, HTML snippets are created for the summary representation of each product.

By default these snippet are cached for one day.

#### **SHOP\_DIALOG\_FORMS**

Specify a list of dialog forms available in our `shop.views.checkout.CheckoutViewSet`. This allows the usage of the endpoint `resolve('shop:checkout-upload')` in a generic way.

If Cascade plugins are used for the forms in the checkout view, this list can be empty.

#### **SHOP\_CASCADE\_FORMS**

Specify a map of Django Form classes to be used by the Cascade plugins used for the checkout view. Override this map, if the Cascade plugins shall use a Form other than the ones provided.

## 4.23 Working off Asynchronous Jobs

A merchant implementation serving **django-SHOP**, usually runs a few asynchronous jobs, such as cleaning stale entries, sending e-mail and building the search index. In Django, there are many ways to handle this, usually by integrating [Celery into Django](#). However, a Celery setup is unnecessarily complicated and usually not required. Instead we can handle all of our asynchronous jobs using a short Python script, referred to as “The Worker” in the documentation. This stand-alone program runs in the same environment as our Django app.

Here is a short example, which can be used as a blueprint for your own implementation:

Listing 24: worker.py

```
#!/usr/bin/env python
import os
import redis
import schedule
import time

if __name__ == '__main__':
 from django import setup
 from django.conf import settings
 from django.core.management import call_command

 # initialize Django
 os.environ.setdefault('DJANGO_SETTINGS_MODULE', 'my_shop.settings')
 setup()

 # schedule jobs
 schedule.every().sunday.do(call_command, 'shopcustomers', delete_expired=True)
```

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```

 schedule.every().day.at('10:00').do(call_command, 'rebuild_index',
↪interactive=False)
 schedule.every().minute.do(call_command, 'send_queued_mail')

 if hasattr(settings, 'SESSION_REDIS'):
 redis_con = dict((key, settings.SESSION_REDIS[key]) for key in ['host', 'port
↪', 'db', 'socket_timeout'])
 pool = redis.ConnectionPool(**redis_con)
 r = redis.Redis(connection_pool=pool)
 pubsub = r.pubsub()
 pubsub.subscribe('django-SHOP')
 else:
 # we don't have a Redis message queue, emulate `pubsub`
 pubsub = type(str('PubSub'), (), {'get_message': lambda s, timeout=1: time.
↪sleep(timeout)})()

 while True: # the main loop
 message = pubsub.get_message(timeout=60)
 if message and message['data'] == 'send_queued_mail':
 call_command('send_queued_mail')
 schedule.run_pending()

```

Here we schedule three jobs:

- Once a week we remove customers, whose session expired and which never made it to the checkout.
- Once a day we rebuild the search index for the Elasticsearch database.
- At least once a minute we send emails pending in the queue. If Redis is configured, **django-SHOP** uses its internal message broker, and whenever an email is added to the queue, the asynchronous worker is notified, in order to send it straightaway.

## 4.24 Deployment using Docker

By using [Docker](#) in combination with Docker Compose, the deployment of a **django-SHOP** installation becomes really simple. We make use of this in the demos, but these examples are intended to run on a local docker machine, hence there we use the internal web server provided by [uWSGI](#). In a productive environment, we usually use a web server to dispatch HTTP requests onto a backend application server. This setup has been tested with [NGiNX](#), which allows us to dispatch multiple server names using the same IP address. Moreover, it also terminates all https connections.

### 4.24.1 Get started with the django-SHOP container composition

Each instance of a **django-SHOP** installation consists of at least 3 Docker containers. Some of them, such as postgres, redis and elasticsearch are build from the standard images as provided by Docker-Hub. They do not require customized Docker files.

Only the one providing the merchant implementation must be built using a project specific Dockerfile.

Before we start, let's create a folder named `docker-files`. All files added to this folder shall be managed by the version control system of your choice.

## Configure uWSGI

Add a file named `uwsgi.ini` to the folder named `docker-files`. This is the main configuration file for our web application worker. **uWSGI** has incredibly many configuration options and can be fine-tuned to your projects needs. Please consult their documentation for the given configuration options.

Listing 25: `docker-files/uwsgi.ini`

```
[uwsgi]
chdir = /web
umask = 002
uid = django
gid = django
if-env = VIRTUAL_PROTO
socket = :9009
endif =
if-not-env = VIRTUAL_PROTO
http-socket = :9009
endif =
exec-pre-app = /web/manage.py migrate
module = wsgi:application
buffer-size = 32768
static-map = /media=/web/workdir/media
static-map = /static=/web/staticfiles
static-expire = /* 7776000
offload-threads = %k
post-buffering = 1
processes = 1
threads = 1
```

Depending on whether `VIRTUAL_PROTO` is set to `uwsgi` (see below) or not, **uWSGI** either starts as a socket server listening for WSGI requests, or as a pure web server listening for HTTP requests. The latter is useful for testing the **uWSGI** application server, without having to run **NGiNX** as frontend. For example, this setup is used by the tutorial.

The directive `exec-pre-app` performs a database migration whenever a new version of the built containers is started. This means that we can only perform forward migrations, which is the usual case anyway. In the rare occasion, when we have to perform a backward migration, we have to do that manually by entering into the running container, using `docker exec -ti containername /bin/bash`.

The directives `static-map` point onto the folders containing the collected static- and media-files. These folders are referenced by the configuration directives `STATIC_ROOT` and `MEDIA_ROOT` in the projects `settings.py`, so make sure they correspond to each other.

The directives `processes` and `threads` shall be adopted to the expected system load and the machine's equipment.

## Building the Images

We need a recipe to build the image for two of the containers in our project: `wsgiapp` and an optional `worker`. The latter is a stand-alone Python script for *Working off Asynchronous Jobs*. Since it runs in the same environment as our Django app, we use the same Docker image running two different containers.

Add a file name `Dockerfile` to the folder named `docker-files`.

Listing 26: `docker-files/Dockerfile`

```
FROM python:3.5
ENV PYTHONUNBUFFERED 1
```

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```

RUN mkdir /web
WORKDIR /web
ARG DJANGO_MEDIA_ROOT=/web/workdir/media
ARG DJANGO_STATIC_ROOT=/web/staticfiles

other additional packages outside of PyPI
RUN apt-get update
RUN curl -sL https://deb.nodesource.com/setup_8.x | bash -
RUN apt-get install -y nodejs gdal-bin
RUN rm -rf /var/lib/apt/lists/*

install project specifly requirements
ADD requirements /tmp/requirements
RUN pip install -r /tmp/requirements/version-0.5.txt
RUN pip install 'uWSGI<2.1'
RUN groupadd -g 1000 django
RUN useradd -M -d /web -u 1000 -g 1000 -s /bin/bash django

copy project relevant files into container
ADD my_shop /web/my_shop
ADD package.json /web/package.json
ADD package-lock.json /web/package-lock.json
ADD manage.py /web/manage.py
ADD wsgi.py /web/wsgi.py
ADD worker.py /web/worker.py
ADD docker-image/uwsgi.ini /web/uwsgi.ini
RUN npm install

handle static files
ENV DJANGO_STATIC_ROOT=$DJANGO_STATIC_ROOT
RUN mkdir -p $DJANGO_STATIC_ROOT/CACHE
RUN _BOOTSTRAPPING=1 ./manage.py compilescss
RUN _BOOTSTRAPPING=1 ./manage.py collectstatic --noinput --ignore='*.scss'
RUN chown -R django.django $DJANGO_STATIC_ROOT/CACHE

handle media files in external volume
ENV DJANGO_MEDIA_ROOT=$DJANGO_MEDIA_ROOT
RUN mkdir -p $DJANGO_MEDIA_ROOT
RUN chown -R django.django $DJANGO_MEDIA_ROOT

EXPOSE 9009
VOLUME /web/workdir

```

A container of this Docker image runs both, the Django application server and the asynchronous worker. Please refer to the Docker documentation for details on the applied directives.

Ensure that the media directory is located inside a Docker volume. Otherwise all uploaded media files are lost, whenever the image is rebuilt.

The port, on which the application server is listening for connections, must be exposed by Docker. Therefore ensure that the setting `EXPOSE` matches with the settings for `socket/http-socket` used by the uWSGI daemon in `uwsgi.ini` (see above).

## Environment Variables

Some images must communicate with each other and hence require common configuration settings. In order not having to repeatedly typing them, we use a common configuration file used by more than one Docker image configuration. There we store our environment variables used for our configuration.

Add a file name `environ` to the folder named `docker-files`.

Listing 27: `docker-files/environ`

```
POSTGRES_DB=my_pg_database
POSTGRES_USER=my_pg_user
POSTGRES_PASSWORD=my_pg_passwd
POSTGRES_HOST=postgresdb
REDIS_HOST=redishost
ELASTICSEARCH_HOST=elasticsearch
DJANGO_EMAIL_HOST=outgoing_smtp_server
DJANGO_EMAIL_PORT=587
DJANGO_EMAIL_USER=email_user
DJANGO_EMAIL_PASSWORD=email_password
DJANGO_EMAIL_USE_TLS=yes
DJANGO_EMAIL_FROM=no-reply@example.com
DJANGO_EMAIL_REPLY_TO=info@example.com
```

Replace the values of these environment variables with whatever is appropriate for your setup.

## Composing everything together

The final step is to compose everything together, so that every service runs in its own container. This is the way Docker is intended to be used. For this we require a file named `docker-compose.yml`. This file must be placed at the root of the merchant's project:

Listing 28: `docker-compose.yml`

```
version: '2.0'

services:
 postgresdb:
 restart: always
 image: postgres
 env_file:
 - docker-files/environ
 volumes:
 - pgdata:/var/lib/postgresql/data
 networks:
 - shopnet

 redishost:
 image: redis
 volumes:
 - 'redisdata:/data'
 networks:
 - shopnet

 elasticsearch:
 image: elasticsearch:1.7.5
 container_name: elasticsearch
```

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```

environment:
 - cluster.name=docker-cluster
 - bootstrap.memory_lock=true
 - "ES_JAVA_OPTS=-Xms512m -Xmx512m"
ulimits:
 memlock:
 soft: -1
 hard: -1
volumes:
 - esdata:/usr/share/elasticsearch/data
networks:
 - shopnet

wsgiapp:
 restart: always
 build:
 context: .
 dockerfile: docker-files/Dockerfile
 image: my_shop
 env_file:
 - docker-files/enviro
 volumes:
 - shopmedia:/web/workdir/media
 command: uwsgi --ini uwsgi.ini
 depends_on:
 - postgresdb
 - redis
 - elasticsearch
 networks:
 - shopnet
 ports:
 - 9009:9009

worker:
 restart: always
 image: my_shop
 env_file:
 - docker-files/enviro
 command: su django -c /web/worker.py
 volumes:
 - shopmedia:/web/workdir/media
 depends_on:
 - postgresdb
 - redis
 networks:
 - shopnet

networks:
 shopnet:

volumes:
 pgdata:
 redisdata:
 shopmedia:
 esdata:

```

Before proceeding with the final setup, we try to build and start a stand-alone version of this web application. This

helps to find errors much quicker, in case something went wrong.

```
$ docker-compose up --build
```

This step will take a while, especially the first time, since many Docker images must be downloaded from the Docker hub. If all containers are up and running, point a browser onto the IP address of the docker-machine and on port 9009. The IP address can be discovered by invoking `docker-machine ip`.

If everything works, we stop the containers using `CTRL-C` and proceed to the next section. In case a problem occurred, check the log statements dumped onto the terminal.

### 4.24.2 Run NGiNX with Let's Encrypt

In a production environment, usually you run these, and probably other containers behind a single NGiNX instance. Additionally, since our customers normally do provide their user credentials and other sensitive information, such as credit card numbers, we *must* ensure that our connection is secured by https.

To do so, we run a separate composition of two Docker containers using this configuration in a file named `nginx-compose.yml`.

Listing 29: `nginx-compose.yml`

```
version: '2.0'

services:
 nginx-proxy:
 restart: always
 image: jwilder/nginx-proxy:latest
 ports:
 - '80:80'
 - '443:443'
 volumes:
 - '/var/run/docker.sock:/tmp/docker.sock:ro'
 - '/etc/nginx/vhost.d'
 - '/usr/share/nginx/html'
 - '/etc/nginx/certs'
 networks:
 - nginx-proxy

 letsencrypt-nginx-proxy-companion:
 image: jrcs/letsencrypt-nginx-proxy-companion
 volumes:
 - '/var/run/docker.sock:/var/run/docker.sock:ro'
 volumes_from:
 - 'nginx-proxy'

networks:
 nginx-proxy:
 external: true
```

If we build these containers the first time, we might have to create the network, since it is declared as external:

```
$ docker network create nginx-proxy
```

To build and run the web server plus Let's Encrypt companion, we invoke:



```
$ docker-compose -f nginx-compose.yml up --build -d
```

This spawns up two running Docker containers, where `nginx-proxy` is the actual webserver and `letsencrypt-nginx-proxy-companion` just manages the SSL certificates using the [Let's Encrypt](#) certification authority. Note that you must point at least one DNS entry onto the IP address of this host. This name must resolve by the global Domain Name Service.

Check if everything is up and running:

```
$ docker-compose -f nginx-compose.yml ps
```

↩State	Name	Ports	Command	↩
↩	-----			
↩	nginxproxy_letsencrypt-nginx-proxy-companion_1		/bin/bash /app/entrypoint. ...	Up
	nginxproxy_nginx-proxy_1		/app/docker-entrypoint.sh ...	Up
↩	↩ 10.9.8.7:443->443/tcp, 10.9.8.7:80->80/tcp			

Pointing a browser onto the IP address of our docker-machine will raise a Gateway error. This is intended behaviour, because our NGiNX yet does not know where to route incoming requests.

### Provide django-SHOP behind NGiNX

Finally we want to run our **django-SHOP** instance behind the just configured NGiNX proxy. For this we have to edit the file `docker-compose.yml` from above. There we change to following lines:

- In section `wsgiapp`, add the environment variables `VIRTUAL_HOST`, `VIRTUAL_PROTO`, `LETSencrypt_HOST` and `LETSencrypt_EMAIL` to subsection `environment`, as shown below. They are used to configure the NGiNX-Proxy.
- In section `wsgiapp`, add `nginx-proxy` to subsection `networks` and to the global section `networks`, as shown below.
- Since we don't need to access our WSGI application via an externally reachable port, we can remove the `ports` configuration from section `wsgiapp`.

Listing 30: `docker-compose.yml`

```
wsgiapp:
 ...
 environment:
 - VIRTUAL_HOST=www.my_shop.com
 - VIRTUAL_PROTO=uwsgi
 - LETSencrypt_HOST=www.my_shop.com
 - LETSencrypt_EMAIL=ssladmin@my_shop.com
 ...
 networks:
 - shopnet
 - nginx-proxy
 ...
networks:
 shopnet
 nginx-proxy:
 external: true
```

Re-create and run the Docker containers using:

```
$ docker-compose up --build -d
```

The container `wsgiapp` then starts to communicate with the container `nginx-proxy` and reconfigures its virtual hosts settings without requiring any other intervention. The same also applies for the container `letsencrypt-nginx-proxy-companion`, which then issues a certificate from the Let's Encrypt Certification Authority. This may take a few minutes.

To check if everything is up and running, invoke:

```
$ docker-compose ps
```

Name	Command	State	Ports
my_shop_elasticsearch_1	/docker-entrypoint.sh elas ...	Up	9200/tcp, 9300/tcp
my_shop_postgresdb_1	docker-entrypoint.sh postgres	Up	5432/tcp
my_shop_redishost_1	docker-entrypoint.sh redis ...	Up	6379/tcp
my_shop_webapp_1	uwsgi --ini uwsgi.ini	Up	9007/tcp
my_shop_worker_1	su django -c /web/worker.py	Up	9007/tcp

### 4.24.3 Troubleshooting

If anything goes wrong, a good place to start is to check the logs. Accessing the logs is as easy as invoking:

```
$ docker container logs my_shop_webapp_1
```

Some recipes on how to perform certain tasks in **django-SHOP**.

*This collection of recipes unfortunately is not finished yet.*

## 5.1 Add Customized HTML Snippets

When working in *Structure Mode* as provided by **django-CMS**, while editing the DOM tree inside a placeholder, we might want to add a HTML snippet which is not part of the **Cascade** ecosystem. Instead of creating an additional Django template, it often is much easier to just add a customized plugin. This plugin then is available when editing a placeholder in *Structure Mode*.

### 5.1.1 Customized Cascade plugin

Creating a customized plugin for the merchant's implementaion of that e-commerce project is very easy. Just add this small Python module:

Listing 1: myshop/cascade.py

```
from cms.plugin_pool import plugin_pool
from shop.cascade.plugin_base import ShopPluginBase

class MySnippetPlugin(ShopPluginBase):
 name = "My Snippet"
 render_template = 'myshop/cascade/my-snippet.html'

plugin_pool.register_plugin(MySnippetPlugin)
```

then, in the project's `settings.py` register that plugin together with all other **Cascade** plugins:

```
CMSPLUGIN_CASCADE_PLUGINS = (
 'cmsplugin_cascade.segmentation',
 'cmsplugin_cascade.generic',
 'cmsplugin_cascade.link',
 'shop.cascade',
 'cmsplugin_cascade.bootstrap3',
 'myshop.cascade',
 ...
)
```

The template itself `myshop/cascade/my-snippet.html` can contain all `templatetags` as configured within the Django project.

Often we want to associate customized styles and/or scripts to work with our new template. Since we honor the principle of [encapsulation](#), we somehow must refer to these files in a generic way. This is where `django-sekizai` helps us:

Listing 2: `myshop/cascade/my-snippet.html`

```
{% load static sekizai_tags %}

{% addtoblock "css" %}<link href="{% static 'myshop/css/my-snippet.css' %}" rel=
→"stylesheet" type="text/css" />{% endaddtoblock %}
{% addtoblock "js" %}<script src="{% static 'myshop/js/my-snippet.js' %}" type="text/
→javascript"></script>{% endaddtoblock %}

<div>
 my snippet code goes here...
</div>
```

**Note:** The main rendering template requires a block such as `{% render_block "css" %}` and `{% render_block "js" %}` which then displays the stylesheets and scripts inside the appropriate HTML elements.

## Further customizing the plugin

Sometimes we require additional parameters which shall be customizable by the merchant, while editing the plugin. For **Cascade** this can be achieved very easily. First think about what kind of data to store, and which form widgets are appropriate for that kind of editor. Say we want to add a text field holding the snippets title, then change the plugin code from above to:

```
class MySnippetPlugin(ShopPluginBase):
 ...
 title = GlossaryField(widgets.TextInput(), label=_("Title"))
```

Inside the rendering template for that plugin, the newly added title can be accessed as:

```
<h1>{{ instance.glossary.title }}</h1>
<div>...
```

**Cascade** offers many more options than just these. For details please check its [reference guide](#).

### 5.1.2 Creating a customized Form snippet

Sometimes we might need a dialog form, to store arbitrary information queried from the customer using a customized form. Say we need to know, when to deliver the goods. This information will be stored inside the dictionary `Cart.extra` and thus transferred automatically to `Order.extra` whenever the cart object is converted into an order object.

Our form plugin now must inherit from `shop.cascade.plugin_base.DialogFormPluginBase` instead of our ordinary `shop.plugin` class:

```
from cms.plugin_pool import plugin_pool
from shop.models.cart import CartModel
from shop.cascade.plugin_base import DialogFormPluginBase

class DeliveryDatePlugin(DialogFormPluginBase):
 name = "Delivery Date"
 form_class = 'myshop.forms.DeliveryDateForm'
 render_template = 'myshop/checkout/delivery-date.html'

 def get_form_data(self, context, instance, placeholder):
 cart = CartModel.objects.get_from_request(context['request'])
 initial = {'delivery_date': getattr(cart, 'extra', {}).get('delivery_date', '
→')}
 return {'initial': initial}

DialogFormPluginBase.register_plugin(DeliveryDatePlugin)
```

here additionally we have to specify a `form_class`. This form class can inherit from `shop.forms.base.DialogForm` or `shop.forms.base.DialogModelForm`. Its behavior is almost identical to its Django's counterparts:

Listing 3: myshop/forms.py

```
class DeliveryDateForm(DialogForm):
 scope_prefix = 'data.delivery_date'

 date = fields.DateField(label="Delivery date")

 @classmethod
 def form_factory(cls, request, data, cart):
 delivery_date_form = cls(data=data)
 if delivery_date_form.is_valid():
 cart.extra.update(delivery_date_form.cleaned_data)
 return delivery_date_form
```

The `scope_prefix` marks the JavaScript object below our AngularJS `$scope`. This must be an identifier which is unique across all dialog forms building up our ecosystem of **Cascade** plugins.

The classmethod `form_factory` must, as its name implies, create a form object of the class it belongs to. As in our example from above, we use this to update the cart's `extra` dictionary, whenever the customer submitted a valid delivery date.

The last piece is to put everything together using a form template such as:

Listing 4: templates/myshop/checkout/delivery-date.html

```
{% extends "shop/checkout/dialog-base.html" %}
```

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```
{% block dialog_form %}
<form name="{{ delivery_date_form.form_name }}" novalidate>
 {{ delivery_date_form.as_div }}
</form>
{% endblock %}
```

## 5.2 Handling Discounts

Generally, this is how you implement a “bulk rebate” module, for instance.

## 5.3 Taxes

As a general rule, the unit price of a product, shall always contain the net price. When our products show up in the catalog, their method `get_price(request)` is consulted by the framework. It is here where you add tax, depending on the tax model to apply. See below.

### 5.3.1 Use Cart Modifiers to handle Value Added Tax

**Django-SHOP** is not shipped with any kind of built-in tax handling code. This is because tax models vary from product to product and region to region. Therefore the tax computation shall be pluggable and easily exchangeable.

#### American tax model

The American tax model presumes that all prices are shown as net prices, hence the subtotal is the sum of all net prices. On top of the subtotal we add the taxes and hence compute the total.

A simple tax cart modifier which adds the tax on top of the subtotal:

```
from shop.serializers.cart import ExtraCartRow
from shop.modifiers.base import BaseCartModifier

VALUE_ADDED_TAX = 9.0

class CartIncludeTaxModifier(BaseCartModifier):
 taxes = VALUE_ADDED_TAX / 100

 def add_extra_cart_row(self, cart, request):
 amount = cart.subtotal * self.taxes
 instance = {
 'label': "plus {}% VAT".format(VALUE_ADDED_TAX),
 'amount': amount,
 }
 cart.extra_rows[self.identifier] = ExtraCartRow(instance)
 cart.total += amount
```

#### European tax model

The European tax model presumes that all prices are shown as gross prices, hence the subtotal already contains the taxes. However, we must report the contained taxes on the invoice.

A simple tax cart modifier which reports the tax already included in the subtotal:

```
from shop.serializers.cart import ExtraCartRow
from shop.modifiers.base import BaseCartModifier

VALUE_ADDED_TAX = 19.0

class CartExcludedTaxModifier(BaseCartModifier):
 taxes = 1 - 1 / (1 + VALUE_ADDED_TAX / 100)

 def add_extra_cart_row(self, cart, request):
 amount = cart.subtotal * self.taxes
 instance = {
 'label': "{}% VAT incl.".format(VALUE_ADDED_TAX),
 'amount': amount,
 }
 cart.extra_rows[self.identifier] = ExtraCartRow(instance)
```

Note that here we do not change the current total.

## Mixed tax models

When doing business to business, then in Europe the American tax model is used. Sites handling both private customers as well as business customers must provide a mixture of both tax models. Since business customers can be identified through the Customer objects provided by request object, we can determine which tax model to apply in each situation.

### 5.3.2 Varying Taxes per Item

For certain kind of products, different tax rates must be applied. If your e-commerce site must handle these kinds of products, then we add a tag to our product model. This could be an enum field, with one value per tax rate or a decimal field containing the rate directly.

In this example we use the latter, where each product contains a field named `vat`, containing the tax rate in percent.

```
from shop.serializers.cart import ExtraCartRow
from shop.modifiers.base import BaseCartModifier
from myshop.models.product import Product

class TaxModifier(BaseCartModifier):
 def __init__(self, identifier=None):
 super(TaxModifier, self).__init__(identifier)
 self.tax_rates = Product.objects.order_by('vat').values('vat').
 ↪ annotate(count=Count('vat'))

 def pre_process_cart(self, cart, request):
 for rate in self.tax_rates:
 tax_attr = '{}_vat_{vat}'.format(self.identifier, **rate)
 setattr(cart, tax_attr, Money(0))

 def add_extra_cart_item_row(self, cart_item, request):
 vat = cart_item.product.vat
 tax_attr = '{}_vat_{1}'.format(self.identifier, vat)
 amount = cart_item.line_total * Decimal(vat) / 100
 setattr(cart_item, tax_attr, amount)
```

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```

def post_process_cart_item(self, cart, cart_item, request):
 tax_attr = '_{0}_vat_{1}'.format(self.identifier, cart_item.product.vat)
 setattr(cart, tax_attr, getattr(cart, tax_attr) + getattr(cart_item, tax_
 ↪attr))

def add_extra_cart_row(self, cart, request):
 for rate in self.tax_rates:
 tax_attr = '_{}_vat_{vat}'.format(self.identifier, **rate)
 instance = {
 'label': "plus {vat}% VAT".format(**rate),
 'amount': getattr(cart, tax_attr),
 }
 cart.extra_rows['_{}:vat_{vat}'.format(self.identifier, **rate)] = ↪
 ↪ExtraCartRow(instance)

def process_cart(self, cart, request):
 super(TaxModifier, self).process_cart(cart, request)
 for rate in self.tax_rates:
 tax_attr = '_{}_vat_{vat}'.format(self.identifier, **rate)
 cart.total += getattr(cart, tax_attr)

```

First, in method `pre_process_cart` we add additional attributes to the cart object, in order to have a placeholder where to sum up the taxes for each tax rate.

In method `add_extra_cart_item_row` we compute the tax amount for each item individually and store it as additional attribute in each cart item.

In method `post_process_cart_item` we sum up the tax amount over all cart items.

In method `add_extra_cart_row` we report the sum of all tax rates individually. They will show up on the invoice using one line per tax rate.

Finally, in method `process_cart` we sum up all tax amounts for all rates and add them to the cart's total.



## CHAPTER 6

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### Django compatibility table

---

django-SHOP	Django							
	1.8	1.9	1.10	1.11	2.0	2.1	2.2	3.0
0.10.x	✓	✓						
0.11.x		✓	✓					
0.12.x				✓				
0.13.x				✓				
1.0.x				✓				
1.1.x				✓	✓	✓	✓	
1.2.x						✓	✓	✓



### 7.1 Changelog for django-SHOP

#### 7.1.1 1.2.2

- Fix #786: Make shipping costs disappear, if cart modifiers doesn't apply them anymore.
- Remove deprecated HTML tag `<center>` from email template used to render the order.
- Add Bolivian Boliviano to the list of currencies.
- Fix #819: Accessing customerproxy addresses in admin raises Type error.

#### 7.1.2 1.2.1

- In management command, make mandatory CMS page for rendering search results, recommended only.

#### 7.1.3 1.2

- Add support for Django-3.0.
- For full-text searching, replace Haystack against elasticsearch-dsl.
- Drop support for Python 2.7 and 3.4.
- Drop support for Django-1.11 and 2.0.

#### 7.1.4 1.1.4

- Fix rendering bug in Product Gallery plugin.

### 7.1.5 1.1.3

- Add South African Rand to currencies.

### 7.1.6 1.1.2

- Fix #802: `CartItemSerializer` raised an exception if field `CartItem.extra` was handled by Django's internal Postgres `JSONField`.
- Fix: In Django>2, rendering of `OrderItem` in Inline Admin did not work anymore.

### 7.1.7 1.1.1

- Fix: Rendering text for full text index raised an exception.
- Upgrade calls to `djangoRESTframework` API to support version 3.9 and later.
- Fix: Generating email during purchasing operation raised an exception.

### 7.1.8 1.1

- Add support for Django-2.2, 2.1. Drop support for Django<1.11.
- Add wrapper around Django's messages framework so that messages can be displayed asynchronously using a new AngularJS directive `<toast-messages>`.
- Add endpoint `fetch_messages` to fetch JSON description for toast-messages.
- Add stock management offering a simple addon to products, or alternatively an inventory management class, allowing to sell short and limiting to special periods.
- Refactored views for adding product to cart and changing quantity in cart so that the purchasing quantity can not exceed the quantity in stock.
- The default commodity product now keeps track of the quantity in stock.
- Changed the signature of the methods `shop.modifiers.base.CartModifierBase.pre_process_cart()` and `shop.modifiers.base.CartModifierBase.pre_process_cart_item()` to take an extra boolean parameter.
- Remove sub-serializer availability from product, because now it is handled internally by the class `shop.serializers.defaults.catalog.AddToCartSerializer`.
- For products with managed availability, show the remaining number in stock.
- Changed the field type of quantity in `shop.models.defaults.cart_item.CartItem` and `shop.models.defaults.order_item.OrderItem` from `IntegerField` to `PositiveIntegerField`. (Ann.: This change, by accident slipped into version 1.0.1 and was reverted in 1.0.2).

### 7.1.9 1.0.2

- Revert the change of the quantity field to use a `PositiveIntegerField` in the default implementations of `CartItem` and `OrderItem` models. This caused #766. This change was scheduled for version 1.1 but unfortunately slipped into version 1.0.1.

### 7.1.10 1.0.1

- Fix error in admin interface for `Notification` detail view.
- Refactor all internal model checks to use classmethod `check()` provided by Django.

### 7.1.11 1.0

- Replace various files containing Python requirements against `Pipfile` to be used by `pipenv`.
- Migrated all default templates to use Bootstrap-4 and replace all tables using the HTML tag `<table>` against flex elements.
- Switch to `py.test` in favor of Django test-cases.
- It now is possible to override the forms for selecting the payment-, shipping- and extra annotation using a configuration directive.
- Adopted to django-CMS version 3.5.
- Fix all compatibility issues with Django-1.11.
- Fix all compatibility issues with Django REST framework 3.8.
- Upgrade to angular-ui-bootstrap version 2.5. This requires `django-cms-cascade` version 0.17.x and a slight modification of the navbar rendering.
- Add Order number to Order List View.
- It is possible to access the Order Detail View anonymously by using a secret in the URL.
- Remove directory `example` in favor of the new project `cookiecutter-django-shop`.
- Customized Template Engine which keeps track on referenced images and stores them as attachments to be used in multipart email messages. This requires a patched version of `django-post_office`.
- Add `related_name` to fields `delivery` and `item` to the model `Delivery`. Check your reverse relations.
- Added an apphook `PasswordResetApp`, so that all pages, even those to reset the password, can now be handled by a page by the CMS.
- Pagination of catalog list view can distinguish between *auto-infinite*, *manual-infinite* and *pagination*.
- Pagination of catalog list view prevents widow items.
- Cart widget displays a short summary of products after adding a product, or mouse-over event.
- `AddToCart` now optionally renders a modal dialog after adding the product.
- All forms in the checkout process can be overridden using a settings variable.
- Buttons are configurable to be disabled, if wrapping form is invalid.
- Unified all management commands into `shop` with different subcommands.
- Add management command `shop check-pages` to verify mandatory and recommended CMS pages.
- Add management command `shop review-settings` to verify the configuration settings.
- Refactored payment- and shipping-modifiers into their own submodules, so that they stay side-by-side with their order workflow mixins.
- All payment- and shipping-modifiers support an instantiation either as list or as instance. This allows to implement payment- or shipping-service-provider offering different payment- or shipping methods themselves.

- Changed all relative import against absolute ones.
- In context for email template rendering, renamed `data` to a more meaningful name such as `order`.
- Add support for inlined images when sending HTML emails.
- Replace FSM signal `post_transition` against a function `transition_change_notification` which either is invoked by `OrderAdmin.save_model()` or while processing an Order through the frontend by the customer.
- In Order event notification, add data about each delivery to the serialized Order data.
- Upgrade to `djangoCMS-bootstrap` version 1.0.2.
- Fix: Do not always refetch cart data from server.
- Improve style of rendering for invoice and delivery notes in the Order backend.
- Use specific naming for relation of model `DeliveryItem` to models `OrderItem` and `Delivery`.
- Add reusable scroll-spy for AngularJS directive `navabar`.

### 7.1.12 0.12.2

- Fix #729: Issue with Notification admin transition choices (`RETURN_VALUE`).
- Adopted templates to be used by **angular-ui-bootstrap** version 2.5.
- Compatible with **django-CMS** version 3.5.

### 7.1.13 0.12.1

- Fix: #724: broken amount rendering when `USE_TOUSAND_SEPARATOR` is `True`.
- Adopt `shoplinkplugin.js` to use function `initializeLinkTypes` as required by **djangoCMS-cascade** version 0.16.

### 7.1.14 0.13

- Drop support for Django-1.9, add support for Django-1.11.
- Add method `get_weight()` to product model, so that a cart modifier may sum up the product weights.
- Configured Cart modifiers may be a list, rather than a single instance.
- Refactor shipping and payment modifiers in `shop/modifiers/defaults.py` into their own files `shop/shipping/modifiers.py` and `shop/payment/modifiers.py`.
- Refactor shipping workflows in `shop/shipping/base.py` and `shop/shipping/defaults.py` into their own file `shop/shipping/workflows.py`. Extract `TRANSITION_TARGETS` into their common base class.
- Refactor payment workflows in `shop/payment/base.py` and `shop/shipping/defaults.py` into their own file `shop/payment/workflows.py`.
- Remove unused class `ShippingProvider`.
- Add support for [SendCloud](#) integration.
- When partial delivery is configured, it now is possible to create multiple deliveries concurrently.

- Add configuration directive `SHOP_MANUAL_SHIPPING_ID` which shall be used to make the input field for the “Shipping ID” readonly.
- Add configuration directive `SHOP_OVERRIDE_SHIPPING_METHOD` which shall be used to allow the merchant to choose another shipping provider, instead of that selected by the customer.
- Model `DeliveryItem` was moved into `shop.models.defaults.delivery_item` to prevent accidental instantiation.
- Add `OrderPaymentInline` to `OrderAdmin` only, if status requires a payment or a refund.
- In `OrderAdmin` add tick to inform about a fulfilled `Order` payment.
- In `ManualPaymentWorkflowMixin` unified methods `prepayment_partially_deposited()` and `prepayment_fully_deposited()` into method `payment_deposited()`.
- Add method `__str__()` to model `BaseDelivery`.
- All models which can be used in the `DialogForm`, can offer a method `as_text()` which may render a nicely formatted representation of its content.
- Add method `reorder_form_fields` to `Customer` model, so that inheriting models can fix the order of form fields.

### 7.1.15 0.12

- Adopted for `django-angular` version 2.0, which breaks its API. Invalid forms rejected by the server are send with a status code of 422 now. Check their changelog for details.
- Adopted to `AngularJS`-1.6.6, which required to replace all `.success()` handlers against a promise `.then()`.
- RESTified the communication with the server, by using `HTTP` methods `PUT` and `DELETE` where appropriate.
- Rename `PayInAdvanceWorkflowMixin` to `ManualPaymentWorkflowMixin`, since its purpose is to handle all incoming/outgoing payments manually.
- Move `LeftExtensionPlugin` and `RightExtensionPlugin` into module `shop/cascade/extensions` and allow them to be used on the `ShopOrderViewsPlugin` as well.
- Refactored `ShopReorderButtonPlugin` and `ShopOrderAddendumFormPlugin` to use the new `django-forms-set` directive, as provided by **django-angular** version 2.0.
- `ShopOrderAddendumFormPlugin` can optionally render historical annotations for the given order.
- Added hook methods `cancelable()` and `refund_payment()` to `BaseOrder` to allow a better order cancelling interface.
- Paid but unshipped orders, now can be refunded. Possible be refactoring class `CancelOrderWorkflowMixin`, which handles payment refunds.
- Add `Order` status to `Order Detail View`, so that the customer immediately sees what’s going on.
- Reject method `POST` on `Order List View`.
- Fix: On re-add item to cart, use `product_code` to identify if that product already exists in cart.
- Do not render buttons and links related to the watch-list, when it is not available.
- Use `Sekizai`’s `templatetags` `{% add_data %}` and `{% with_data %}` instead of `Sekizai`’s post-processors `django.sekizai_processors.module_config` and `django.sekizai_processors.module_list`, which now are deprecated.
- Remove `HTTP-Header X-HTTP-Method-Override` and use `PUT` and `DELETE` requests natively.
- Remove `django-angular` dependency `django.url` from project.

- Endpoints in JavaScript are always referenced through HTML. This eliminates the need for `'djng.middleware.AngularUrlMiddleware'` in `MIDDLEWARE_CLASSES` of your `settings.py`.
- Use Django's internal password validator configuration `AUTH_PASSWORD_VALIDATORS` in your `settings.py`.
- Refactored all templates for authentication forms to simplify inheritance and to use the promise chain (offered by django-angular 2.0). This allows to do fine-grained adoptions in the submit buttons behaviour.
- Decoupled all checkout forms. They don't require `dialog.js`, `forms-sets.js` and `auth.js` anymore. Instead use the functionality provided by django-angular 2.0 form directives.
- Use a REST endpoint to add, modify and delete multiple shipping and billing addresses. This simplifies the address forms. Remove `shipping-address.js` and replace it against a more generic `address.js`.
- Use an event broadcast `shop.carticon.caption` to inform the carticon about changes in the cart.
- Add an overridable `CartItemCaptionSerializer` to specify what to render in the cart-icon.
- Use event broadcasting to inform the checkout forms if configured in summary mode. This decouples checkout form updates, from rendering their summary on another page or process step.
- Add operator to test Money type against booleans.
- Fix: Adopt polymorphic ModelAdmin-s to django-polymorphic>=1.0.
- Add to `ShopProceedButton`: Disable button if any form in this set is invalid.
- Use vanilla Javascript in serverside JS-expressions.
- Decoupled `CheckoutViewSet` from `CartViewSet`, so that the checkout only handles forms relevant to the checkout process.
- Endpoint `digest` in `CheckoutViewSet`, returns a full description of all forms, plus the current cart's content. Fetching from there is emit a `shop.checkout.digest` event.
- Added directives `shop-payment-method` and `shop-shipping-method` which update the cart and emit a `shop.checkout.digest` event on change.
- Fix: All form input field get their own unique HTML id. Previously some id's were used twice and caused collisions.
- Fix: Do not rebuild list of cart items, on each change of quantity.
- Separate `CartController` into itself and a `CartItemController`.
- Consistent naming of emit and broadcast events.
- Introduce `CartSummarySerializer` to retrieve a smaller checkout digest.
- In Shipping- and Payment Method Form, optionally show additional charges below the radio fields, depending on the selected method.
- Remove `angular-message` from the list of npm dependencies.
- Fix: Products with `active=False` are exempted from the catalog list views and accessing them raises a Not Found page.

### 7.1.16 0.11.7

- Fix: Python3 can not handle `None` type in `max()` function.
- Smoother animation when showing Payment form.



### 7.1.17 0.11.6

- Fix #708: Passing None when calling `django.template.loader.select_template` in `shop/cascade/catalog.py`.

### 7.1.18 0.11.5

- Fix: Money formatter did not work for search results.
- Image building uses docker-compose with official images instead of a crafted Dockerfile.

### 7.1.19 0.11.4

- Fix: Template context error while rendering Order List-View as Visitor.
- Fix: Money formatter to allow the usage of the thousand separator.
- Fix: It now is possible to use the `ProductListView` as the main CMS landing page.
- Fix: Template exception if left- or right extension was missing on the `OrderList` and/or `OrderDetail` view.
- Add option to Catalog List View: It now is possible to redirect automatically onto a lonely product.
- Add options to override the add-to-cart template when using the appropriate CMS Cascade plugin.
- Add option to add a list of products to the navigation node serving a catalog list page.
- Upgrade external dependencies to their latest compatible versions.

### 7.1.20 0.11.3

- Fix: Problems with missing Left- and Right Extension Plugin.
- Ready for Django-1.11 if used with django-CMS-3.4.5
- Ready for django-restframework-3.7
- Tested with recent versions of other third party libraries.
- Fix issues with enum types when importing fixtures.
- Add Swedish Kronor to currencies.

### 7.1.21 0.11.2

- Do not render buttons and links related to the watch-list, when it is not available.
- Fix: Adopt polymorphic ModelAdmin-s to `django-polymorphic`  $\geq 1.0$ .
- Use Sekizai's internal `templatetags {% with_data ... %}` and `{% with_data %}` to render Sekizai blocks `ng-requires` and `ng-config` rather than using the deprecated postprocessors `djng.sekizai_processors.module_list` and `djng.sekizai_processors.module_config`. Adopt your templates accordingly as explained in *Client Side Framework*.
- Rename `PayInAdvanceWorkflowMixin` to `ManualPaymentWorkflowMixin`, since its purpose is to handle all incoming/outgoing payments manually.

- Move `LeftExtensionPlugin` and `RightExtensionPlugin` into module `shop/cascade/extensions` and allow them to be used on the `ShopOrderViewsPlugin` as well.
- `ShopOrderAddendumFormPlugin` can optionally render historical annotations for the given order.
- Added hook methods `cancelable()` and `refund_payment()` to `BaseOrder` to allow a better order cancelling interface.
- Paid but unshipped orders, now can be refunded. Possible be refactoring class `CancelOrderWorkflowMixin`, which handles payment refunds.
- Add Order status to Order Detail View, so that the customer immediately sees what's going on.
- Add support for Python-3.6.

### 7.1.22 0.11.1

- Fix migration `0007_notification` to handle field `mail_to` correctly.
- Allow transition to cancel order only for special targets.
- Add operator to test `Money` type against booleans.

### 7.1.23 0.11

- Fix: `shop.rest.renderers.CMSPageRenderer` always uses the template offered by the CMS page, rather than invoking method `get_template_names()` from the corresponding `APIView` class.
- Feature: Add class: `shop.rest.renderers.ShopTemplateHTMLRenderer` which is the counterpart of `shop.rest.renderers.CMSPageRenderer`, usable for hardcoded Django views.
- Refactor: In examples *polymorphic* and *i18n\_polymorphic*, renamed `SmartPhone` to `SmartPhoneVariant`.
- Feature: In `shop.money.fields.MoneyFormField` use a widget which renders the currency.
- Refactor: In `shop.money.fields.MoneyField`, drop support for implicit default value, since it causes more trouble than benefit.
- Fix: Handle non-decimal types in `shop.money.fields.MoneyField.get_db_prep_save()`.
- Fix: In AngularJS, changes on filters and the search field did not work on Safari.
- Fix: In `shop.views.auth.AuthFormsView.post()` create a customer object from request for a visiting customers, rather than responding with *BAD REQUEST*.
- Fix: `shop.models.order.OrderManager.get_summary_url()` only worked for views rendered as CMS page. Now it also works for static Django views.
- Simplified all methods `get_urls()` from all classes derived from `CMSApp` by exploiting CMS-PR 5898 introduced with django-CMS-3.4.4.
- Remove field `customer` from `shop.serializers.order.OrderListSerializer`, since it interfered with the `customer` object on the global `template_context` namespace, causing template `shop/navbar/login-logout.html` to fail.
- Management command `fix_filer_bug_965` is obsolete with `django-filer-1.2.8`.
- Fix: Use caption in Order Detail View.
- Add Leaflet Map plugin from `djangoCMS-cascade` for demonstration purpose.

- Moved `package.json` into `example/package.json` (and with it `node_modules`) since it shall be part of the project, rather than the Django app.
- Fix: In `shop.models.order.BaseOrderItem.populate_from_cart_item()` the `unit_price` is taken from the `cart_item`, rather than being recalculated.
- `shop.cascade.cart.ShopCartPlugin` accepts two children: `ShopLeftExtension` and `ShopRightExtension` which can be used to add plugins inside the cart's table footer.
- In `shop.models.notification.Notification` renamed field `mail_to` to `recipient` and converted it to a `ForeignKey`. Added an enum field `notify` to distinguish between different kinds of recipients.
- Refactored `CustomerStateField` into a reusable `shop.models.fields.ChoiceEnumField` which can be used for both, `Notify` as well as `CustomerState`.
- Adopted to **djangoCMS-cascade** version 0.14, which allows to render static pages using plugin descriptions in JSON.
- Added Paginator to Order List View.
- Refactored `shop.app_settings` into `shop.conf.app_settings` to be usable by Sphinx in docstrings.
- Added `shop.models.order.BaseOrder.get_all_transitions()` which returns all possible transitions for the `Order` class.
- In `shop.rest.renderers.ShopTemplateHTMLRenderer` do not pollute `template_context` with serialized data on the root level.
- Fix #623: Template `auth/register-user.html` did not validate properly, when Reset password was checked.
- Added AngularJS filter `range` to emulate enumerations in JavaScript.
- Fallback to hard-coded URL if CMS page for "Continue Shopping" is missing.

### 7.1.24 0.10.2

- Fixed migration error in `0004_ckeditor31.py`.
- Fixed #554: Email is no longer created when notification is triggered.
- Fixed: Using a `ManyToManyField` through `ProductPage` ignores the blank attribute, when saving a product in the admin backend.
- Hard code "Cart" into tooltip for cart icon, until <https://github.com/divio/django-cms/issues/5930> is fixed.
- Renders a nicer summary when rendering a multiple address form.
- Fixed: When placeholder is `None` raises `AttributeError`.

### 7.1.25 0.10.1

- Fixed #537 and #539: Rendering *data* in template has different results after upgrading to 0.10.

### 7.1.26 0.10.0

- In the backend, `OrderAdmin` and `OrderItemAdmin` may render the dictionary `extra` from their associated models using a special template.

- In `OrderAdmin` use methods `get_fields()` and `get_readonly_fields()` as intended.
- Tested with Django-1.10. Drop support for Django-1.8.
- If an anonymous customer logs in, his current cart is merged with a cart, which has previously been created. This has been adopted to re-use the method `Product.is_in_cart()` in and finds it's Merge the contents of the other cart into this one, afterwards delete it.
- Moved field `salutation` from `shop.models.customer.BaseCustomer` into the merchant implementation. If your project does not use the provided default customer model `shop.models.defaults.customer.Customer`, then you should add the `salutation` field to your implementation of the `Customer` model, if that makes sense in your use-case.
- Refactored the defaults settings for shop using an `AppSettings` object.
- Refactored all serializers into their own folder `shop/serializers` with submodules `bases.py`, `cart.py`, `order.py` and `defaults.py`. The serializers `CustomerSerializer`, `ProductSummarySerializer` and `OrderItemSerializer` now are configurable through the application settings.
- AngularJS directive `<shop-auth-form ...>` now listens of the event “pressed ENTER key” and submits the form data accordingly.
- Upgraded to AngularJS version 1.5.9.
- HTML5 mode is the default now.
- The previously required additional endpoint for the autocomplete search, can now be merged into the same endpoint as connected to the catalog's list view. This has been made possible by the wrapper `shop.search.views.CMSPageCatalogWrapper` which dispatch incoming requests to either the `shop.views.catalog.ProductListView` or, for search queries to `shop.search.views.SearchView`.
- Added choice option “Infinite Scroll” to the Cascade plugins **Catalog List View** and **Search Results**. They influence if the paginator is rendered or trigger an event to load more results from the server.
- Changed all Cascade plugins to follow the new API introduced in **djangoCMS-cascade** version 0.12.
- Directive `shop-product-filter` must be member of a `<form ...>` element.
- Unified the plugins **ShippingAddressFormPlugin** and **BillingAddressFormPlugin** into one plugin named **CheckoutAddressPlugin**, where the merchant can choose between the shipping- or billing form.
- Refactored `shop.forms.checkout.AddressForm` and fixed minor bugs when editing multiple addresses.
- In address models, replaced `CharField` for country against a special `CountryField`.
- Change value of `BaseShippingAddress.address_type` to `shipping` and `BaseBillingAddress.address_type` to `billing`.
- Method `shop.models.order.OrderManager.get_latest_url()` falls back to `reverse('shop-order-last')` if no such page with ID `shop-order-last` was found in the CMS.
- Use `menu_title` instead of page title for link and tooltip content.
- In `DialogForm`, field `plugin_id` is not required anymore.
- After a new customer recognized himself, the signal `customer_recognized` is fired so that other apps can act upon.
- Unified `ProductCommonSerializer`, `ProductSummarySerializer` and `ProductDetailSerializer` into a single `ProductSerializer`, which acts as default for the `ProductListView` and `ProductRetrieveView`.

- Dependency to **djangoCMS-cascade** is optional now.
- Added alternative compressor for `{% render_block "js/css" "shop.sekizai_processors.compress" %}` which can handle JS/CSS files provided using `{% addtoblock "js/css" ... %}` even if located outside the `/static/` folders.
- Added method `post_process_cart_item` to the Cart Modifiers.
- In `CartItem` the `product_code` is mandatory now. It moves from being optionally kept in `dict CartItem.extra` into the `CartItem` model itself. This simplifies a lot of boilerplate code, otherwise required by the merchant implementation.
- In `shop.models.product.BaseProduct` added a hook method `get_product_variant(self, **kwargs)` which can be overridden by products with variations to return a product variant.

### 7.1.27 0.9.3

- Added template context processor `shop.context_processors.ng_model_options()` to add the settings `EDITCART_NG_MODEL_OPTIONS` and `ADD2CART_NG_MODEL_OPTIONS`. Please check your templates to see, if you still use `ng_model_options`.
- Allows to add children to the `CartPlugin`. These children are added to the table foot of the rendered cart.
- Added AngularJS directive `<ANY shop-forms-set>` which can be used as a wrapper, when the proceed button shall be added to a page containing `<form ...>` elements with built in validation.
- All Cascade plugins use `GlossaryField` instead of a list of `PartialFormField`s. This is much more “Djangonic”, but requires `djangoCMS-cascade` version 0.11 or later.
- All urlpatterns are compatible with configurations adding a final `/` to the request URL.
- The URL for accessing an `Order` object, now uses the order number instead of it’s primary key.

### 7.1.28 0.9.2

- Minimum required version of `django-filer` is now 1.2.5.
- Minimum required version of `djangoCMS-cascade` is now 0.10.2.
- Minimum required version of `djangoShop-stripe` is now 0.2.0.
- Changed the default address models to be more generic.
- Fixed `shop.money.fields.deconstruct()` to avoid repetitive useless generation of migration files.
- Using `cached_property` decoration for methods `unit_price` and `line_total` in `shop.models.order.OrderItem`.
- Fixed #333: Accessing the cart when there is no cart associated with a customer.
- Removed Apphook `shop.cms_apps.OrderApp`. This class now must be added to the project’s `cms_apps.py`. This allows the merchant to override the `shop.rest.serializers.OrderListSerializer` and `shop.rest.serializers.OrderDetailSerializer`.
- Bugfix: declared `django-rest-auth` as requirement in `setup.py`.
- Refactored `shop.models.deferred` -> `shop.deferred`. This allows to add a check for pending mappings into the ready-method of the shop’s `AppConfig`.
- Prepared for Django-1.10: Replaced all occurrences of `django.conf.urls.patterns()` by a simple list.

- Method `get_render_context` in classes extending from `django_filters.FilterSet` now must be a classmethod accepting a request object and the querystring.
- Method `get_renderer_context` in class `CMSPageProductListView` now fetches the rendering context for filtering *after* the queryset have been determined. This allows us to adopt the context.
- Function `loadMore()` in `CatalogListController` bypasses the existing search query. This allows to use hard coded links for tag search.
- Using Python's `Enum` class to declare customer states, such as `UNRECOGNIZED`, `GUEST` or `REGISTERED`.
- Created a customized database field to hold the customers states, as stored by the above `Enum`.
- Fixed: A server-side invalidated email addresses was accepted anyway, causing problems for returning customers.
- Renamed CMS Page IDs for better consistency: \* `personal-details` -> `shop-customer-details` to access the Customer Detail Page. \* `reset-password` -> `shop-password-reset` to access the Reset Password Page. \* `new`: `shop-register-customer` to access the Register User Page.
- Moved all non-Python dependencies from `bower_components` into `node_modules`.
- The breadcrumb now is responsible itself for being wrapped into a Bootstrap container.
- Use `Sekizai` processors from `django-angular`. Replaced `shop-ng-requires` against `ng-requires` and `shop-ng-config` against `ng-config`.

### 7.1.29 0.9.1

- Support for Python 3
- Support for Django-1.9
- Added abstract classes `class:shop.models.delivery.BaseDelivery` and `class:shop.models.delivery.BaseDeliveryItem` for optional partial shipping.

### 7.1.30 0.9.0

- Separated `class:shop.views.catalog.ProductListView` into its base and the new class `class:shop.views.catalog.CMSPageProductListView` which already has added it appropriate filters.
- Moved `wsgi.py` into upper folder.
- Prototype of `shop.cascade.DialogFormPluginBase.get_form_data` changed. It now accepts `context`, `instance` and `placeholder`.
- Fixed: It was impossible to enter the credit card information for Stripe and then proceed to the next step. Using Stripe was possible only on the last step. This restriction has gone.
- It now also is possible to display a summary of your order before proceeding to the final purchasing step.
- To be more Pythonic, `class:shop.models.cart.CartModelManager` raises a `DoesNotExist` exception instead of `None` for visiting customers.
- Added method `filter_from_request` to `class:shop.models.order.OrderManager`.
- Fixed: `OrderAdmin` doesn't ignore error if customer URL can't be resolved.
- Fixed: Version checking of Django.
- Fixed: Fieldsets duplication in Product Admin.
- `CartPlugin` now can be child of `ProcessStepPlugin` and `BootstrapPanelPlugin`.

- Added ShopAddToCartPlugin.
- All Checkout Forms now can be rendered as editable or summary.
- All Dialog Forms now can declare a legend.
- In `DialogFormPlugin`, method `form_factory` always returns a form class instead of an error dict if form was invalid.
- Added method `OrderManager.filter_from_request`, which behaves analogous to `CartManager.get_from_request`.
- Fixed lookups using `MoneyField` by adding method `get_prep_value`.
- Dropped support for South migrations.
- Fixed: In `ProductIndex`, translations now are always overridden.
- Added class `SyncCatalogView` which can be used to synchronize the cart with a catalog list view.
- Content of Checkout Forms is handled by a single transaction.
- All models such as `Product`, `Order`, `OrderItem`, `Cart`, `CartItem` can be overridden by the merchant's implementation. However, we are using the deferred pattern, instead of configuration settings.
- Categories must be implemented as separate **django-SHOP** addons. However for many implementations pages from the **django-CMS** can be used as catalog list views.
- The principle on how cart modifiers work, didn't change. There more inversion of control now, in that sense, that now the modifiers decide themselves, how to change the subtotal and final total.
- Existing Payment Providers can be integrated without much hassle.

### 7.1.31 Since version 0.2.1 a lot of things have changed. Here is a short summary:

- The API of **django-SHOP** is accessible through a REST interface. This allows us to build MVC on top of that.
- Changed the two OneToOne relations from model `Address` to `User`, one was used for shipping, one for billing. Now abstract `BaseAddress` refers to the `User` by a single `ForeignKey` giving the ability to link more than one address to each user. Additionally each address has a `priority` field for shipping and invoices, so that the latest used address is offered to the client.
- Replaced model `shop.models.User` by the configuration directive `settings.AUTH_USER_MODEL`, to be compliant with Django documentation.
- The cart now is always stored inside the database; there is no more distinction between session based carts and database carts. Carts for anonymous users are retrieved using the visitor's `session_key`. Therefore we don't need a utility function such `get_or_create_cart` anymore. Everything is handled by the a new `CartManager`, which retrieves or creates or cart based on the request session.
- If the quantity of a cart item drops to zero, this items is not automatically removed from the cart. There are plenty of reasons, why it can make sense to have a quantity of zero.
- A `WatchList` (some say wish-list) has been added. This simply reuses the existing `Cart` model, where the item quantity is zero.
- `Currency` and `CurrencyField` are replaced by `Money` and `MoneyField`. These types not only store the amount, but also in which currency this amount is. This has many advantages:
  - An amount is rendered with its currency symbol as a string. This also applies for JSON data-structures, rendered by the REST framework.
  - Money types of different currencies can not be added/subtracted by accident. Normal installations woun't be affected, since each shop system must specify its default currency.

- Backend pools for Payment and Shipping have been removed. Instead, a Cart Modifier can inherit from `PaymentModifier` or `ShippingModifier`. This allows to reuse the Cart Modifier Pool for these backends and use the modifiers logic for adding extra rows to the carts total.
- The models `OrderExtraRow` and `OrderItemExtraRow` has been replaced by a `JSONField` `extra_rows` in model `OrderModel` and `OrderItemModel`. `OrderAnnotation` now also is stored inside this extra field.
- Renamed for convention with other Django application:
  - `date_created` -> `created_at`
  - `last_updated` -> `updated_at`
  - `ExtraOrderPriceField` -> `BaseOrderExtraRow`
  - `ExtraOrderItemPriceField` -> `BaseItemExtraRow`

### 7.1.32 Version 0.2.1

This is the last release on the old code base. It has been tagged as 0.2.1 and can be examined for historical reasons. Bugs will not be fixed in this release.

### 7.1.33 Version 0.2.0

- `models.FloatField` are now automatically localized.
- Support for Django 1.2 and Django 1.3 dropped.
- Product model now has property `can_be_added_to_cart` which is checked before adding the product to cart
- In `cart_modifiers` methods `get_extra_cart_price_field` and `get_extra_cart_item_price_field` accepts the additional object `request` which can be used to calculate the price according to the state of a session, the IP-address or whatever might be useful. Note for backwards compatibility: Until version 0.1.2, instead of the `request` object, an empty Python dictionary named `state` was passed into the cart modifiers. This `state` object could contain arbitrary data to exchange information between the cart modifiers. This Python dict now is a temporary attribute of the `request` object named `cart_modifier_state`. Use it instead of the `state` object.
- Cart modifiers can add an optional `data` field beside `label` and `value` for both, the `ExtraOrderPriceField` and the `ExtraOrderItemPriceField` model. This extra `data` field can contain anything serializable as JSON.

### 7.1.34 Version 0.1.2

- `cart_required` and `order_required` decorators now accept a reversible url name instead and redirect to cart by default
- Added setting `SHOP_PRICE_FORMAT` used in the `priceformat` filter
- Separation of Concern in `OrderManager.create_from_cart`: It now is easier to extend the `Order` class with customized data.
- Added `OrderConfirmView` after the shipping backend views that can be easily extended to display a confirmation page
- Added example payment backend to the example shop
- Added example `OrderConfirmView` to the example shop



- Unconfirmed orders are now deleted from the database automatically
- **Refactored order status (requires data migration)**
  - removed PAYMENT and added CONFIRMING status
  - assignment of statuses is now linear
  - moved cart.empty() to the PaymentAPI
  - orders now store the pk of the originating cart
- **Checkout process works like this:**
  1. CartDetails
  2. **CheckoutSelectionView**
    - POST -> Order.objects.create\_from\_cart(cart) removes all orders originating from this cart that have status < CONFIRMED(30)
    - creates a new Order with status PROCESSING(10)
  3. **ShippingBackend**
    - self.finished() sets the status to CONFIRMING(20)
  4. **OrderConfirmView**
    - self.confirm\_order() sets the status to CONFIRMED(30)
  5. **PaymentBackend**
    - self.confirm\_payment() sets the status to COMPLETED(40)
    - empties the related cart
  6. **ThankYouView**
    - does nothing!

### 7.1.35 Version 0.1.1

- Changed CurrencyField default decimal precision back to 2

### 7.1.36 Version 0.1.0

- Bumped the CurrencyField precision limitation to 30 max\_digits and 10 decimal places, like it should have been since the beginning.
- Made Backends internationalizable, as well as the BillingShippingForm thanks to the introduction of a new optional backend\_verbose\_name attribute to backends.
- Added order\_required decorator to fix bug #84, which should be used on all payment and shipping views
- Added cart\_required decorator that checks for a cart on the checkout view #172
- Added get\_product\_reference method to Product (for extensibility)
- Cart object is not saved to database if it is empty (#147)
- Before adding items to cart you now have to use get\_or\_create\_cart with save=True
- Changed spelling mistakes in methods from *payed* to *paid* on the Order model and on the API. This is potentially not backwards compatible in some border cases.

- Added a mixin class which helps to localize model fields of type `DecimalField` in Django admin view.
- Added this newly created mixin class to `OrderAdmin`, so that all price fields are handled with the correct localization.
- Order status is now directly modified in the shop API
- `CartItem` URLs were too greedy, they now match less.
- In case a user has two carts, one bound to the session and one to the user, the one from the session will be used (#169)
- Fixed circular import errors by moving base models to `shop.models_bases` and base managers to `shop.models_bases.managers`

### 7.1.37 Version 0.0.13

(Version cleanup)

### 7.1.38 Version 0.0.12

- Updated translations
- Split `urls.py` into several sub-files for better readability, and put in a `urls` subfolder.
- Made templates extend a common base template
- Using a dynamically generated form for the cart now to validate user input. This will break your `cart.html` template. Please refer to the changes in `cart.html` shipped by the shop to see how you can update your own template. Basically you need to iterate over a formset now instead of `cart_items`.
- Fixed a circular import problem when user overrode their own models

### 7.1.39 Version 0.0.11

- Performance improvement (update `CartItems` are now cached to avoid unnecessary db queries)
- Various bugfixes

### 7.1.40 Version 0.0.10

- New hooks were added to cart modifiers: `pre_process_cart` and `post_process_cart`.
- [API change] Cart modifiers cart item methods now receive a state object, that allows them to pass information between cart modifiers cheaply.
- The cart items are not automatically saved after `process_cart_item` anymore. This allows for cart modifiers that change the cart's content (also deleting).
- Changed the version definition mechanism. You can now: `import shop; shop.__version__`. Also, it now conforms to PEP 386
- [API Change] Changed the payment backend API to let `get_finished_url` and `get_cancel_url` return strings instead of `HttpResponse` objects (this was confusing)
- Tests for the shop are now runnable from any project
- added URL to `CartItemView.delete()`

### 7.1.41 Version 0.0.9

- Changed the base class for Cart Modifiers. Methods are now expected to return a tuple, and not directly append it to the `extra_price_fields`. Computation of the total is not done using an intermediate “current\_total” attribute.
- Added a `SHOP_FORCE_LOGIN` setting that restricts the checkout process to logged-in users.

### 7.1.42 Version 0.0.8

- Major change in the way injecting models for extensibility works: the base models are now abstract, and the shop provides a set of default implementations that users can replace / override using the settings, as usual. A special mechanism is required to make the Foreign keys to shop models work. This is explained in `shop.utils.loaders`

### 7.1.43 Version 0.0.7

- Fixed bug in the extensibility section of `CartItem`
- Added complete German translations
- Added verbose names to the Address model in order to have shipping and billing forms that has multilingual labels.

### 7.1.44 Version 0.0.6

(Bugfix release)

- Various bugfixes
- Creating AddressModels for use with the checkout view (the default ones at least) were bugged, and would spawn new instances on form post, instead of updating the user’s already existing ones.
- Removed redundant payment method field on the Order model.
- The “thank you” view does not crash anymore when it’s refreshed. It now displays the last order the user placed.
- Fixed a bug in the shippingbilling view where the returned form was a from class instead of a from instance.

### 7.1.45 Version 0.0.5

- Fix a bug in 0.0.4 that made South migration fail with Django < 1.3

### 7.1.46 Version 0.0.4

- Addresses are now stored as one single text field on the Order objects
- OrderItems now have a ForeignKey relation to Products (to retrieve the product more easily)
- New templatetag (“products”)
- Made most models swappable using settings (see docs)
- Changed checkout views. The shop uses one single checkout view by default now.
- Created new mechanism to use custom Address models (see docs)
- Moved all Address-related models to `shop.addressmodel` sub-app

- Removed Client Class
- Removed Product.long\_description and Product.short\_description from the Product superclass
- Bugfixes, docs update

### **7.1.47 Version 0.0.3**

- More packaging fixes (missing templates, basically)

### **7.1.48 Version 0.0.2**

- Packaging fix (added MANIFEST.in)

### **7.1.49 Version 0.0.1**

- Initial release to Pypi

## **7.2 Frequently Asquest Questions**

### **7.2.1 Frontend Editing**

#### **Order Plugin**

##### **Editing the Order Plugin seems to be broken**

This has to do with the way, **django-CMS** handles the placeholder in its templates. Here the problem is, that we're using the same template for both, the Order List View and their Detail Views. The Order Detail Views however, are not managed by the CMS, but rather by a CMSApphook. The latter confuses the CMS placeholder. It therefore is *strongly recommended* to edit the Order Page only while in List View Mode.

#### **JavaScript**

##### **Can I use django-SHOP without AngularJS?**

When using REST, then client side actions have to be handles somehow using JavaScript. AngularJS was chosen in 2014, because it was the only MVVM-ish framework at the time. However, the intention always has been, that merchants implementing their e-commerce site on top of **django-SHOP** do not have to write a single line of code in JavaScript. The idea is, that everything shall be adoptable using the special HTML elements introduced by **django-SHOP**.

Unless all these directives are replaced by another JavaScript framework, such as React, Ember, Vue.js, Angular2/4, Aurelia, etc., one can setup **django-SHOP** without any JavaScript at all. Then however, a lot of functionality is lost and the user experience will be modest.

## CMS pages as categories

My products have a many-to-many relation with the CMS PageModel. However, in the admin for the product, the multi-select widget does not show any pages.

In the product's admin view, only CMS pages which in their advanced settings are marked as `CatalogList`, are eligible to be connected with a product.

## 7.3 Contributing

### 7.3.1 Naming conventions

The official name of this project is **django-SHOP**. Third party plugins for **django-SHOP** shall follow the same naming convention as for plugins of **django-CMS**: Third party package names shall start with **django**shop followed by a dash; no space or dash shall be added between **django** and **shop**, for example: `django-shop-stripe`

**Django-SHOP** should be capitalised at the start of sentences and in title-case headings.

### 7.3.2 Running tests

It's important to run tests before committing :)

#### Setting up the environment

We highly suggest you run the tests suite in a clean environment, using a tool such as `virtualenv`.

1. Clone the repository and cd into it:

```
git clone https://github.com/awesto/django-shop
cd django-shop
```

2. Create a virtualenv, and activate it:

```
virtualenv ~/.virtualenvs/django-shop
source ~/.virtualenvs/django-shop/bin/activate
```

3. Install the project in development mode:

```
pip install -e .
```

4. Install the development requirements:

```
pip install -r tests/requirements.txt
```

That's it! Now, you should be able to run the tests:

```
export DJANGO_SHOP_TUTORIAL=polymorphic
py.test tests
```

We use `tox` as a CI tool. To run the full CI test suite and get a coverage report, all you have to do is this:

```
pip install tox
tox
```

If you work on a certain part of the code base and you want to run the related tests, you may only want to run the tests affecting that part. In such a case use `py.test` from your testing environment and specify the file to test, or for more granularity the class name or even the method name. Here are two examples:

```
py.test tests/test_money.py
py.test tests/test_money.py -k test_pickle
```

Measuring which lines of code have been “seen” by the test runner is an important task while testing. Do this by creating a coverage report, for example with:

```
pip install coverage
coverage run $(which py.test) tests
coverage report
```

or if you to test only a specific class (assuming you have already ran tox once):

```
coverage run .tox/py27-django19/bin/py.test tests/test_money.py
coverage report -m shop/money/*.py
```

---

**Note:** Using `tox` and `py.test` is optional. If you prefer the conventional way of running tests, you can do this: `django-admin.py test tests --settings shop.testsettings`.

---

### 7.3.3 Community

Most of the discussion around django SHOP takes place on IRC (Internet Relay Chat), on the freenode servers in the `#django-shop` channel.

We also have a mailing list and a google group:

```
http://groups.google.com/group/django-shop
```

### 7.3.4 Code guidelines

Unless otherwise specified, follow [PEP 8](#) as closely as possible.

An exception to PEP 8 is our rules on line lengths. Don’t limit lines of code to 79 characters if it means the code looks significantly uglier or is harder to read. Consider 100 characters as a soft, and 119 as a hard limit. Here soft limit means, that unless a line must be splitted across two lines, it is more readable to stay with a long line.

Use the issue tracker only to report bugs. Send unsolicited pull requests only to fix bug – never to add new features.

Use stack-overflow to ask for questions related to **django-SHOP**.

Most pull requests will be rejected without proper unit testing.

Before adding a new feature, please write a specification using the style for [Django Enhancement Proposals](#).

More information about how to send a Pull Request can be found on GitHub: <https://help.github.com/en/github/collaborating-with-issues-and-pull-requests/creating-a-pull-request>

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## 8.1 Address Model

**DjangoSHOP** is shipped with a default address model as found in `shop.models.defaults.address.ShippingAddress` and `shop.models.defaults.address.BillingAddress`. It is based on a recommendation on [International Address Fields in Web Forms](#).

Some people might feel that this address model is not suitable for their specific use-case, or in their selling region. Since **django-SHOP** allows to override each model, we simply might want to write our own one.

### 8.1.1 Overriding the Default Models

To start with, have a look at the implementation of the default address models mentioned before. Chances are high that you might want to use the same address model for shipping, as well as for billing. Therefore instead of writing them twice, we use a mixin class:

```
from django.db import models

class AddressModelMixin(models.Model):
 name = models.CharField("Full name", max_length=1024)
 address1 = models.CharField("Address line 1", max_length=1024)
 address2 = models.CharField("Address line 2", max_length=1024, blank=True,
 ↪null=True)
 zip_code = models.CharField("ZIP", max_length=12)
 city = models.CharField("City", max_length=1024)

 class Meta:
 abstract = True
```

This mixin class then is used to instantiate the billing address models:

```
from shop.models.address import BaseShippingAddress, BaseBillingAddress
```

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```
class BillingAddress(BaseBillingAddress, AddressModelMixin):
 class Meta:
 verbose_name = "Billing Address"
```

In Europe for B2B commerce, the customer's tax number is associated with the location for delivery. We therefore have to add it to our shipping address models:

```
class ShippingAddress(BaseShippingAddress, AddressModelMixin):
 tax_number = models.CharField("Tax number", max_length=100)

 class Meta:
 verbose_name = "Shipping Address"
```

### 8.1.2 Multiple Addresses

Depending on the shop's requirements, each customer may have no, one or multiple billing- and/or shipping addresses. On an e-commerce site selling digital goods, presumably only the billing address makes sense. A shop with many returning customers probably wants to allow them to store more than one address.

In **django-SHOP** each address model has a foreign key onto the customer model, hence all of the above use-cases are possible.

### 8.1.3 Rendering the Address Forms

During checkout

## 8.2 How to create a Payment backend

Payment backends must be listed in settings.SHOP\_PAYMENT\_BACKENDS

### 8.2.1 Shop interface

While we could solve this by defining a superclass for all payment backends, the better approach to plugins is to implement inversion-of-control, and let the backends hold a reference to the shop instead.

The reference interface for payment backends is located at

```
class shop.payment.api.PaymentAPI
```

Currently, the shop interface defines the following methods:

#### Common with shipping

`PaymentAPI.get_order(request)`

Returns the order currently being processed.

**Parameters** `request` – a Django request object

**Return type** an `Order` instance

`PaymentAPI.add_extra_info(order, text)`

Adds an extra info field to the order (whatever)

**Parameters**

- **order** – an `Order` instance
- **text** – a string containing the extra order information

`PaymentAPI.is_order_paid(order)`

Whether the passed order is fully paid or not

**Parameters** **order** – an `Order` instance

**Return type** `bool`

`PaymentAPI.is_order_complete(order)`

Whether the passed order is in a “finished” state

**Parameters** **order** – an `Order` instance

**Return type** `bool`

`PaymentAPI.get_order_total(order)`

Returns the order’s grand total.

**Parameters** **order** – an `Order` instance

**Return type** `Decimal`

`PaymentAPI.get_order_subtotal(order)`

Returns the order’s sum of item prices (without taxes or S&H)

**Parameters** **order** – an `Order` instance

**Return type** `Decimal`

`PaymentAPI.get_order_short_name(order)`

A short human-readable description of the order

**Parameters** **order** – an `Order` instance

**Return type** a string with the short name of the order

`PaymentAPI.get_order_unique_id(order)`

The order’s unique identifier for this shop system

**Parameters** **order** – an `Order` instance

**Return type** the primary key of the `Order` (in the default implementation)

`PaymentAPI.get_order_for_id(id)`

Returns an `Order` object given a unique identifier (this is the reverse of `get_order_unique_id()`)

**Parameters** **id** – identifier for the order

**Return type** the `Order` object identified by `id`

## Specific to payment

`PaymentAPI.confirm_payment(order, amount, transaction_id, save=True)`

This should be called when the confirmation from the payment processor was called and that the payment was confirmed for a given amount. The processor’s transaction identifier should be passed too, along with an instruction to save the object or not. For instance, if you expect many small confirmations you might want to save all of them at the end in one go (?). Finally the payment method keeps track of what backend was used for this specific payment.

**Parameters**

- **order** – an `Order` instance

- **amount** – the paid amount
- **transaction\_id** – the backend-specific transaction identifier
- **save** – a `bool` that indicates if the changes should be committed to the database.

## 8.2.2 Backend interface

The payment backend should define the following interface for the shop to be able do to anything sensible with it:

### Attributes

`PaymentBackend.backend_name`

The name of the backend (to be displayed to users)

`PaymentBackend.url_namespace`

“slug” to prepend to this backend’s URLs (acting as a namespace)

### Methods

`PaymentBackend.__init__(shop)`

must accept a “shop” argument (to let the shop system inject a reference to it)

**Parameters** `shop` – an instance of the shop

`PaymentBackend.get_urls()`

should return a list of URLs (similar to `urlpatterns`), to be added to the URL resolver when urls are loaded. These will be namespaced with the `url_namespace` attribute by the shop system, so it shouldn’t be done manually.

### Security

In order to make your payment backend compatible with the `SHOP_FORCE_LOGIN` setting please make sure to add the `@shop_login_required` decorator to any views that your backend provides.

## 8.3 Multi-Tenancy

If a site built with the **django-SHOP** framework shall be used by more than one vendor, we speak about a multi-tenant environment. **Django-SHOP** does not implement multi-tenancy out of the box, it however is quite simple to extend and customize.

### 8.3.1 Terminology

To distinguish the roles in a multi-tenant environment, we define the *merchant* as the site owner. On the other side, a *vendor* owns a range of products. Each new product, he adds to the site, is assigned to him. Later on, existing products can only be modified and deleted by the vendor they belong to.

### 8.3.2 Product Model

Since we are free to declare our own product models, This can be achieved by adding a foreign key onto the User model:

```
from shop.models.product import BaseProduct

class Product(BaseProduct):
 # other product attributes
 merchant = models.ForeignKey(
 User,
 verbose_name=_("Merchant"),
 limit_choices_to={'is_staff': True},
)
```

---

**Note:** unfinished docs

---

## 8.4 How to secure your catalog views

Chances are that you don't want to allow your users to browse all views of the shop as anonymous users.



## CHAPTER 9

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### License

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