

EPiSERVER COMMERCE

Release 1.0



User's Guide



User's Guide for EPiServer Commerce 1.0

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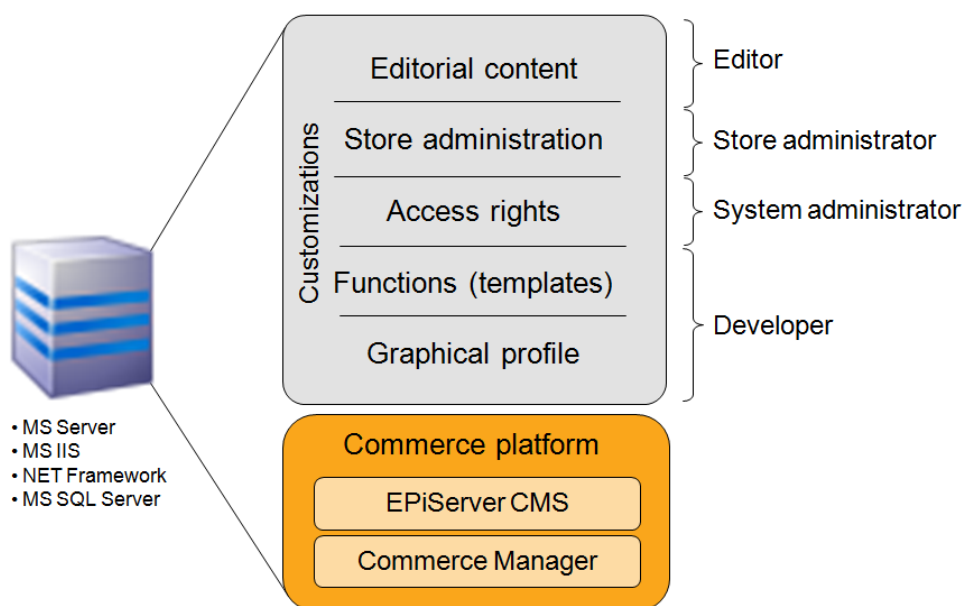
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Introduction

EPiServer Commerce comes with a sample site including a complete set of page templates containing all the necessary functions for setting up a website with an online store. The purpose with the sample site is to exemplify and illustrate the code behind the templates, and to provide inspiration when building your own e-commerce solution.

The Commerce Manager module is closely integrated with EPiServer CMS. Editors and store administrators can work with the content as well as managing the online store administration using the same interface for easy access. The EPiServer OnlineCenter provides the overall frame for accessing the entire website and other systems integrated, as well as the personalized dashboard for each user.



EPiServer Commerce Platform

The foundation of the EPiServer Commerce platform is **EPiServer CMS** for web publishing, and the **Commerce Manager** module for web store management with functionality for managing customers, products and orders. Customers can register an account on the website and manage their account details, as well as create their own personal wish lists. When a shopper is ready to finalize a purchase, the Commerce Manager will provide functionality for handling the checkout procedure with shipping and payment options and order confirmation.

Graphical Profile

The graphical profile controls the layout and appearance of the website. The graphical profile consists of predefined fonts, colors etc. saved in a Cascading Style Sheet (CSS). The graphical profile is customized by a developer.

Functions and Page Templates

The functionality of the web is controlled by page templates. These are linked to page types, in which the editor enters the content of the web page. The functionality in the page template decides what will happen with the content and how it will be displayed. Page templates are built and customized by a developer. With customized page templates the various products and shopping activities can be displayed on the website, with information collected from the Commerce Manager module.

Access Rights

Access rights control what editors and administrators can do and what visitors to the website can see. Access rights in an integrated EPiServer Commerce site are managed from the EPiServer CMS Admin and Edit mode, as well as from the Commerce Manager administration interface, depending on area of permissions.

Editorial Content

Editors enter information into the page types, and the information is then stored in the database. Many of the EPiServer Commerce templates contain few editor fields, since they are only used for display and most of the functionality is built into the page templates.

Store Administration

The online store is administered through the Commerce Manager user interface. Store administrators can easily access all the online store functions including customer, product and order management, as well as system configuration.

Terminology

In this section we will describe some of the specific terms used in e-commerce and EPiServer Commerce.

Editorial Content

With editorial content we mean content that is created from inside the EPiServer CMS Edit mode, such as articles, news or other information pages. Compare this to content that is displayed as pages on the website, but where the content itself is data fetched from Commerce Manager. This type of data cannot be only be edited in Commerce Manager.

Modes

You will work with EPiServer Commerce in different modes.

View mode

What will be displayed to visitors of the website.

Edit mode

Editors will work in the EPiServer CMS edit mode when creating and editing EPiServer CMS content pages of the website.

Admin mode

System administrators will work in the EPiServer CMS administration mode to modify system settings and access rights.

Commerce Manager interface

Store administrators will access the Commerce Manager interface to manage online store data and activities. The Commerce Manager interface can be reached either from inside the EPiServer OnlineCenter, or directly from View mode when right-clicking in a page.

Roles

EPiServer Commerce has a number of different roles that are active in the editorial and online store management activities. These are described further in the following.

Visitor

A visitor is someone using a web browser to visit the website and use available functions and services. A visitor can register an account and become a customer when purchasing a product. Customers can update information related to their personal account. In EPiServer Commerce, visitors use the same login procedure to the website as site administrators, without getting access to the back-end functions.

Editor

The editor will work with website content from the EPiServer CMS Edit mode. Working with content here means create editorial content such as news, company related information, or articles on different subjects.

Store Administrator

The store administrator works in the Commerce Manager interface, with information related to customers, orders and products. Store administrators may also work with configuration of the Commerce Manager system settings.

System Administrator

The system administrator works with the administration of the entire EPiServer Commerce platform. This is done from the EPiServer CMS administration mode and involves setting access rights for pages, website language management and other tasks.

Commerce Manager roles

The Commerce Manager module has its own set of user roles covering the different tasks that store administrators work with. These roles are described further in the Commerce Manager section under Customer Management.

Commerce Manager Glossary**Application Configuration**

- **Shipping Gateways** - Under Shipping Providers, a shipping gateway is the specific class that you select (Generic Gateway or Weight/Jurisdiction Gateway).

- **Shipping Jurisdictions** - an option which allows you to define values for region-specific shipping rates; this is only used when you select the Weight/Jurisdiction Gateway (i.e. California).
- **Shipping Jurisdiction Groups** - group of jurisdictions; this is required because this is a required field when configuring the Shipping Method parameters (i.e. Southwest region).
- **Shipping Method** - A shipping method manages a set of information and rules that determines the shipping cost and displays it on the front-end public site while a customer checks out an item from his/her shopping basket. The shipping fee is added to the total price of the purchase. A shipping method is mapped to a shipping provider visible to a back-end administrator in Commerce Manager. This allows the public site to display friendly names such as "Ground Shipping" to the customer and this is mapped to a provider such as UPS. Therefore, when a customer picks "Ground Shipping," he/she will be using UPS.
- **Shipping Providers** - A shipping provider is the class(es) that interacts directly with one or more actual shipping services such as USPS, UPS, or FedEx. It retrieves shipping price information from the shipping service(s) it's associated with. One typical scenario would be to have a provider that represents a particular service (e.g. USPS). A provider can also represent a particular type of shipping situation. One example is that you could have a provider for overnight delivery. The provider could retrieve pricing for that service to determine the lowest price given the location of the customer. A provider could also represent other specific scenarios with one or more services such as price by weight or ground shipping.

Business Foundation

- **Business Foundation Object (BF Object)** - Similar to a meta class; allows end users to create custom objects with UI presentation, business objects, and a database layer without modify code.
- **Bridge** - A "many to many" or N:N relationship between two business objects.
- **Extension** - this allows you to extend an existing meta class with extra properties. For example, you can have a download class and you can extend it with "imagedownload" which contains width and height as extra parameters.
- **Field Type** - The type of data that the data field supports. There are multiple types included with Commerce Manager out of the box:
 - Boolean
 - Currency
 - DateTime
 - Dictionary items
 - File
 - Guid
 - Integer
 - Referenced Field (read-only)
 - String
- **1 to Many Relationship** - 1 object can be associated or related with multiple object-related data. For example, one organization can be associated with multiple contracts.
- **Many to 1 Relationship** - Multiple object-related data can be associated or related with a single object. For example, multiple contacts can be related to a single organization.
- **Many to Many Relationship** - Multiple object-related data can be associated or related with multiple objects. For example, different SKUs can be associated with one or more Warehouses for tracking and storage.

Catalog Management

- **Assets** - downloadable contents such as documents, links, videos, and images that can be linked to specific products.
- **Associations** - one or more products can be related to or associated to another product so that these associated products can be displayed or advertised on the public site as a product accessory, or as an upsell-ing/cross-selling item. Associations can be made from any of the individual products (Product Entries, SKUs, Bundles, Packages, and Dynamic Packages).
- **Catalog** - a catalog is a top-level container for all catalog entries such as Categories, Products and SKUs.
- **Category** - a category is a grouping of purchasable products.
- **Node** - a node is the same thing as a category.
 - **Product** - a product represents various forms of merchandise that you can display and purchase from the public site, including Products, Variations/SKUs, Bundles, Packages and Dynamic Packages.
 - **Product Entry** - a product entry typically contains a product name, part number, description and images.
 - **Variation/SKU** - a variation or SKU corresponds to a specific type of product with specific characteristics. For example, a product of Shirts will have an individual variation/SKU which includes size, color and sleeve length.
 - **Bundle** - a bundle is a collection of variations and SKUs allowing customers to purchase two or more items at once.
 - **Package** - a package is comparable to an individual SKU because the package item must be purchased as a whole (i.e. computer system).
 - **Dynamic Package** - a dynamic package is similar to the package definition above with the added ability to configure the package during checkout.
- **Tax Category** - this separation of taxes by category allows you to charge a different rate of taxes depending on what is being purchased; for example, you can have one rate for "General Sales" items and another rate for "Luxury Sales" items.

Customer Management

- **Account** - a user account that can be created under a Contact. Once an Account has been created, the Contact can be assigned Roles and access the Commerce Manager. A user account is automatically created for a user who registers from the front-end public website which allows a customer to login prior to checking out. They default to the "Everyone" and "Registered" roles and permissions.
- **Contacts** - these are users that are created either when an external customer registers on the public site or when a Commerce Manager admin creates them directly from the Commerce Manager; typically, users that are internal to your organization are assigned to organizations or organization units and assigned varying permissions based on role. For example, a user with the "Cms Admins" role will have full access to only the Content Management system. By default, new users that are created by registering from the public site are given the "Registered" and "Everyone" roles.
- **Organizations** (or organization units) - groups or sub-groups of registered users and customers. An organizational unit is a "child" or subsidiary of a "parent" organization. Within Commerce Manager, you can assign an organization as a parent of another organization. For example, the parent company Company X, and the organizational units are Company X West and Company X East. Organization units include regional branches or departments or you could name them by business categories such as "Computer and Electronics" or "Clothing and Accessories." Organizations can be structured into a tree structure with sub-

units with different levels of permissions assigned to each. So for example, you can set up your company as a parent level organization while your departments such as Sales & Marketing, IT/Development, and Operations as organization units. With this scenario, you can allow users in each departments to have access to only relevant subsystems, screens and functionality within Commerce Manager.

- **Roles** - these control the level of access privileges of each user account in Commerce Manager. Users can be either granted or restricted access to an entire subsystem or a particular menu item within a subsystem based on the role assigned to them. Different roles may be added to user accounts (i.g., store operator or webmaster) so that they can access, edit, or process relevant information. By default, a customer who registered his/her account to make a purchase in the front-end site will have no roles assigned to them, hence giving him/her preventing access to both the editing feature of the front-end site as well as the back-end Commerce Manager.

Marketing

- **Campaigns** - a way to organize marketing activities. Campaigns must be associated with Promotions in order to provide customer discounts. Optionally, Campaigns can also be tied to Customer Segments for targeted marketing purposes.
 - For example, you can create a seasonal campaign that will include different Promotions targeted for the Spring season.
- **Customer Segments** - these determine the target audience for the Promotions. Customer Segments determine the target audience for the Promotions. Within a Campaign, all Promotions will be applied to whatever Customer Segments associated with the same Campaign. Members of the Customer Segments can be pre-defined in static groups or you can use the Expressions Engine to create dynamic groups whenever Promotions are run.
 - For example, you can have a Customer Segment that targets all users from the Los Angeles area. You can create an Expression that will include all the customers whose home city is Los Angeles. Thus, when a user registers on the site he immediately becomes part of the target Customer Segment.
- **Expressions** - these are customizable Conditions which allow users to extend different aspects of the Marketing system -- Promotions, Customer Segments and Policies all rely on Expressions. There is an Expressions Engine which is a core technology behind the Marketing system.
 - For example, you want to set a Promotion for "40% off Item X." The Expression or Condition to enable this Promotion would include: Catalog ID for Item X and Reward of 40%.
- **Policies** - rules that are always executed when Promotions are applied. This allows a Marketing manager to declare rules just once for the whole site.
 - An example of a rule is as follows: Do not allow negative orders.
- **Promotions** - a way to apply various discounts to the products, order totals or shipping. A Promotion is a marketing tool used to increase sales of certain products or product lines. Various incentives such as lowered pricing and other discounts can be employed as part of a Promotion.
 - Promotions are always tied to Campaigns.
 - Promotions can be classified into two types: 1) either you can create a Promotion that is visible prior to checkout or 2) you can configure the Promotion to be displayed during the checkout process.
 - The most powerful aspect of the Marketing system is the Expression Engine which allows variable conditions to be applied when creating a Promotion. These conditions vary from the number of items, the percentage discount, shipping rates and many others.

Order Management

- **Browsing and Creating Purchase Orders**

- **Purchase Orders** - the manual method of generating an order for a customer (rather than having the customer checkout and complete an order from the front-end website). It allows Commerce Manager users to generate orders directly from the Commerce Manager.
- **Status** - set to "NewOrder," "Submitted," "Processing," "Cancelled," "Rejected," "Shipped"
- **Currency** - select a Currency type from the drop-down menu
- **Customer** - select a Customer from the drop-down list of Contacts
- **Billing Address** - select a Billing Address from the drop-down menu
- **Affiliate** - select an Affiliate from the drop-down list. (Affiliates can be used when integrating with other systems and can only be edited in the database. Users do not have Commerce Manager access for managing Affiliates).
- **Tracking Number** - enter in a Tracking Number of the shipment
- **Expiration Date** - enter in a Expiration Date for the order if this order is tied to a Recurring Payment Plan for subscription-based transactions
- **Parent Order Id** - this can be used to relate Purchase Orders to a payment plan or other order. When creating a Purchase Order from a Recurring Payment Plan, the Parent Order ID is automatically associated with the Payment Plan ID.
- **Line Items** - you can associate actual Products/SKUs/Packages/Bundles to orders or Purchase Orders
 - **ID** - it is automatically generated
 - **Display Name** - this can be edited and changed
 - **List Price** - enter in the price that will appear for the item
 - **Discount** - enter is the Discount value that will subtract from the List Price
 - **Shipping Address** - This is automatically generated if a Shipping Address has already been associated with the Purchase Order
 - **Shipping Method** - This is automatically generated if a Shipping Address has already been associated with the Purchase Order

- **Creating a Recurring Payment Plan**

- **Recurring Payment Plans** - payments that are initiated by the Commerce Manager on a regular cycle (i.e. applicable in a subscription-based scenario)
- **Plan Cycle** - this determines the period of time that a payment plan will be initiated. Options include: "No Cycle," "Daily Cycle," "Weekly Cycle," "Monthly Cycle," "Yearly Cycle."
- **Cycle Length** - If Cycle Length = 1, then this payment plan will be initiated once a month. If Cycle Length = 2, then this payment plan would be initiated once every 2 months.
- **Max Cycle** - the maximum number of cycles that this payment plan will be initiated
- **Completed Cycles** - this value displays the number of times that this payment plan has been initiated

Reporting

- **Best Sellers Report** this report is used to determine which products sold the most in terms of quantity and total revenue over a period of time

- **Low Stock Report** - this report is used to determine which products are running low in inventory. If a product's inventory is less than its reorder minimum quantity, it will be included in this report.
- **Sales Report** - this report provides an overview of a site's sales performance over a period of time
- **Shipping Report** - this report provides the shipping method, number of orders and total shipping cost over a period of time

Prerequisites

This documentation is intended for website editors, and store and system administrators. The documentation describes a **standard installation** based on EPiServer CMS and the demo template package of EPiServer Commerce. Please be aware that your specific system may differ from what is described here, since your website is most likely customized and may be integrated with additional products.



In order for EPiServer Commerce to work properly, it is essential that you are using the specific language culture setting "UI Culture" (ASP.NET) on your website (i.e. "en-US", "en-GB", "nl-BE" etc.). This is crucial in order for the different languages to display correctly on the site. Make sure this is set up correctly from the start to avoid problems later on. Find out more about this topic in the Globalization section.

In this documentation you will learn about specific functions and features of the EPiServer Commerce sample site and templates. Prior knowledge of EPiServer CMS and e-commerce procedures is required to fully understand what is described. To find out more about other EPiServer products such as EPiServer CMS, please refer to the documentation for each specific product available on world.episerver.com.

Getting Started

In the following sections we will describe how you can access and log on to an EPiServer Commerce website. Note that the logon procedures may be slightly different from what is described here, depending on how your website and infrastructure is set up.

Getting started contains the following parts:

- Logging on to the website
- Accessing the different modes
- Navigation
- Working procedures

Logging On

To access the website, open a web browser and enter the address of the website. There are different ways of logging on to an EPiServer Commerce site. Often you add a path such as "epi/ui/edit" or "epi/ui/admin" to the URL of your website, or there might be a login link as in this case.

On the EPiServer Commerce sample site, clicking on **Log in** in the top menu will take you to the login page of the website. Enter your user name and password, and click **Log In**. Note that this login page is the same for both customers logging on to their account, as well as for web editors and store administrators logging on to work with content or administer the online store parts. What you are allowed to do after logging on to the website depends on your access rights.

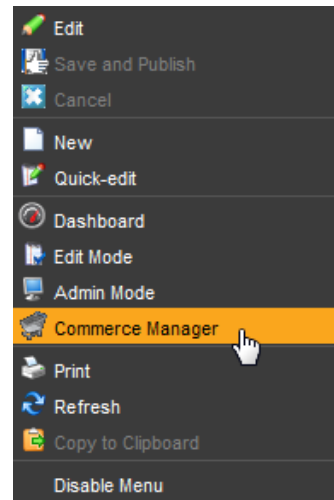
The screenshot shows the login page of the 'CLICK+TALK' website. At the top, there is a navigation bar with links: Log in, My Account, My Cart, Wish List, English (United States), and US dollar. Below this is a header with the 'CLICK+TALK' logo, a shopping basket icon, and a search bar. The main navigation menu includes: Digital Cameras, Camera Accessories, Mobile Phone, Phone Accessories, and Special Offers. The page title is 'Start - Login'. The main heading is 'Login or Create an Account'. There are two sections: 'Existing customers log in' and 'New Customers'. The 'Existing customers log in' section has fields for 'User Name / Email' (filled with 'Mary Smith') and 'Password' (filled with '*****'), both with green checkmarks. There is a 'Remember me next time.' checkbox and a 'Log In' button. A link 'Forgot your password?' is also present. The 'New Customers' section has a 'Create a New Account' link. At the bottom, there is a footer with links organized into columns: Buyers guide (Digital cameras, Mobile Phones, Site Map), About us (History, Our success, Contact, Press), Our Services (How to place an order?, Your payment methods, Terms and Conditions, Order tracking, Guarantee), Customer Service (New Customer?, Register, Forgotten your password), and Support (Download, Help). The footer also includes 'Affiliate Program' and 'Join our program'. The copyright notice at the bottom right is 'Copyright © 2010 EPiServer AB'.

Accessing the Different Modes

When you are logged on to your EPiServer Commerce website, right-clicking on a page will display a menu with a number of options. What you see here depends on your access rights, in this documentation we assume that you have full permission to the different parts.

As for any EPiServer CMS based site, you will be able to access the Edit and Admin mode, as well as the Dashboard of the EPiServer OnlineCenter. In addition to this, you will also have an option to access the Commerce Manager module of EPiServer Commerce. Choosing this option will take you directly to the Commerce Manager administration interface. Selecting the Edit or Admin mode will take you to the EPiServer CMS editor or administration interface.

If you want to work with online store administration, you select **Commerce Manager** in the right-click menu. Note that you might be prompted to log on once more to access Commerce Manager. If you want to work with editorial content of the site, you select **Edit Mode**. Choose **Admin Mode** to work with website access rights, or system administration for the entire website. Select the **Dashboard** option to access your personal website dashboard, for a quick overview of the different website activities. For the other options available, please refer to the EPiServer CMS user documentation.



Logging on to Commerce Manager

You can access Commerce Manager through right-clicking in View mode after logging on to the website, and then select **Commerce Manager** in the right-click menu. You can also select **Commerce** in the top menu when you are in the EPiServer Online Center or from the EPiServer CMS Edit mode.



You may be required to provide your logon credentials once more when accessing the Commerce Manager module. When you log on you will be taken to the **Commerce Manager Dashboard Home** page.

Navigation

EPiServer Commerce has an intuitive navigation. When logged on to EPiServer Commerce, use the right-click menu to go directly to the Commerce Manager interface to work with web store back-end procedures. Or, choose the EPiServer CMS Edit or Admin mode to work with content management or system administrative tasks. See also Accessing the different modes in this documentation.

Navigating in Commerce Manager

Commerce Manager is modeled for familiarity for the user. Those who have used Microsoft Outlook will see some similarities with the user interface.

1. Once you first login to Commerce Manager, you are directed to the Dashboard Home.
2. The Dashboard has Controls showing various information, including Alerts, News & Announcements, Help, and a Summary.
3. More Controls can be added by clicking on Add.

4. On the left is the Left Menu or Navigation iframe where users can switch between Commerce Manager systems and navigate folder trees of options.
5. On the top-right, you can see your Login Name, Product Version, and installed License.
6. By clicking on the top-left header, you will be directed back to the front-end site.
7. On the menu bar below header, there are additional options available to the user.

By clicking **Welcome**, you can adjust your **Settings**, **Sign In As a Different User**, or **Sign Out** of Commerce Manager. You can also change the language used to a different one if your Commerce Manager is configured for multiple languages.

By clicking **About**, you can **Send Feedback** using a form, get information on the **Database Schema** for support purposes, and open up our **Online Help** repository.

On the right side of the menu bar, you can click on **Get Help For this Page** to access the online help for EPiServer Commerce.

Right next to the Get Help For This Page button is an **Up-Down Arrow**, which allows you to hide or unhide the header above the menu bar to save screen space.

Customizing the Dashboard and Navigating the Left Menu Frame

The Dashboard Controls can be collapsed, rearranged, and closed by clicking on the **Arrow** button, clicking on the X button, and click-dragging the title bar, respectively.

There are tabs below the left navigation frame that corresponding to a specific system of the Commerce Manager.

Clicking on each button results in a change of the top side menu.

A common navigational model is the hierarchical folder/node structure. For instance, under Content Management, there is a **My Work** and **Sites** folder. Click on the + node to expand the root folder and subsequent subfolders. Click on a folder or icon directly to access its contents. If changes are made to the tree structure, such as additional Folders or Menus under the Sites folder, you can click on the Refresh icon on the top right corner to update those changes within that frame.

Some systems, such as Customer Management, do not have collapsable nodes. Instead, you click directly on the menu options to access its contents.

Working Procedures

Working with EPiServer Commerce involves different tasks and roles using different parts of the system.

Commerce Manager

Web shop administrators will access the Commerce Manager module and its sub-systems to manage online store procedures such as customer and order management, and payment and shipping procedures. This is also from where the product data configuration and product catalog import is managed. The Commerce Manager also has a dashboard which is displayed when you first log in. Furthermore, the Commerce Manager module has its own access right settings for user roles working with online store administration. In the following you will find a high-level categorization of the most common tasks for users including business managers, marketing staff and IT professionals.

General Configuration

Application Configuration includes various configuration tasks such as setting up Shipping and Payment Gateways, your default language, currency, units, tax configuration, licensing, and search settings. Most of these configuration tasks are performed in the Commerce Manager Administration area.

Users and Customers

Users and customers are managed by the **Customer Management** system. Users are internal to your organization and should not be confused with customers, partners and organizations. Generally, only your team of internal users will have access to the Commerce Manager and depending on their role will have varying access to the systems and menu items within each system. Each Commerce Manager user has certain permissions as defined by their user Role of group.

Catalogs and Product Entries

An Commerce Manager front-end site allows customers to shop for products. Products are arranged into a particular catalog. Catalogs are independent from one another and you may create as many catalogs as you need. Catalogs can be structured in a number of ways and organized into Categories, Products, SKUs, Bundles, Packages and Dynamic Packages.

The **Catalog Management** system provides users with the ability to manage catalogs, product categories and products. A default B2C Sample Site along with a default electronics catalog (consisting of a Brands catalog + Everything catalog) is included giving you a running demo site after you run the installer.

Online Orders, Purchase Orders and Shopping Carts

The **Order Management** system is where you can monitor, track, change or create New Orders, Pending Orders or Failed Orders. Orders are highly flexible, giving internal Commerce Manager users the ability to create Purchase Orders with various options including split Payments and split shipping addresses. In addition, Pending Sales can be viewed by each customer's shopping cart. Recurring Payment Plans can also be monitored.

Marketing and Promotions

One area handled by the **Marketing** system is Promotions. A Promotion is a marketing tool used to increase sales of certain products or product lines. Various incentives such as lowered pricing and other discounts can be employed as part of a Promotion.

Promotions can be classified into two types: either you can create a promotion that is visible prior to checkout or you can configure the promotion to be displayed during the checkout process. The most powerful aspect of the Marketing system is the Workflow Engine which allows variable conditions to be applied when creating a Promotion. These conditions vary from the number of items, the percentage discount, shipping rates and many others.

Marketers have the ability to target specific customer segments by region, individual customers or customer groups.

Assets and Web Files

The **Asset Management** system allows for Assets including images, mp3s, pdfs, software packages and other downloadable files to be centrally stored, displayed on either the public site or the Commerce Manager site and ultimately to be shared or purchased.

EPiServer CMS Edit mode

Web editors will work inside the EPiServer CMS editorial interface to update content of web pages. The EPiServer Commerce page types in the sample site do not require much editorial work, since most of these are only for display purposes fetching data from elsewhere. Some editorial effort will be needed on content pages such as news listings, privacy and shopping policies and similar.

EPiServer CMS Admin mode

The EPiServer administration interface is where you will manage the administrative tasks for the website. These may involve working with access rights for EPiServer CMS web pages, configuration of page types, management of scheduled jobs, and globalization settings.

EPiServer OnlineCenter

All users including business and website owners, can use EPiServer OnlineCenter to get an overview of the website and activities of interest. Through the usage of customized gadgets on the personalized dashboard, you can create your own website workspace. The OnlineCenter also has a global search function where you can search for topics in both pages and files on the entire website.

User Access and Roles

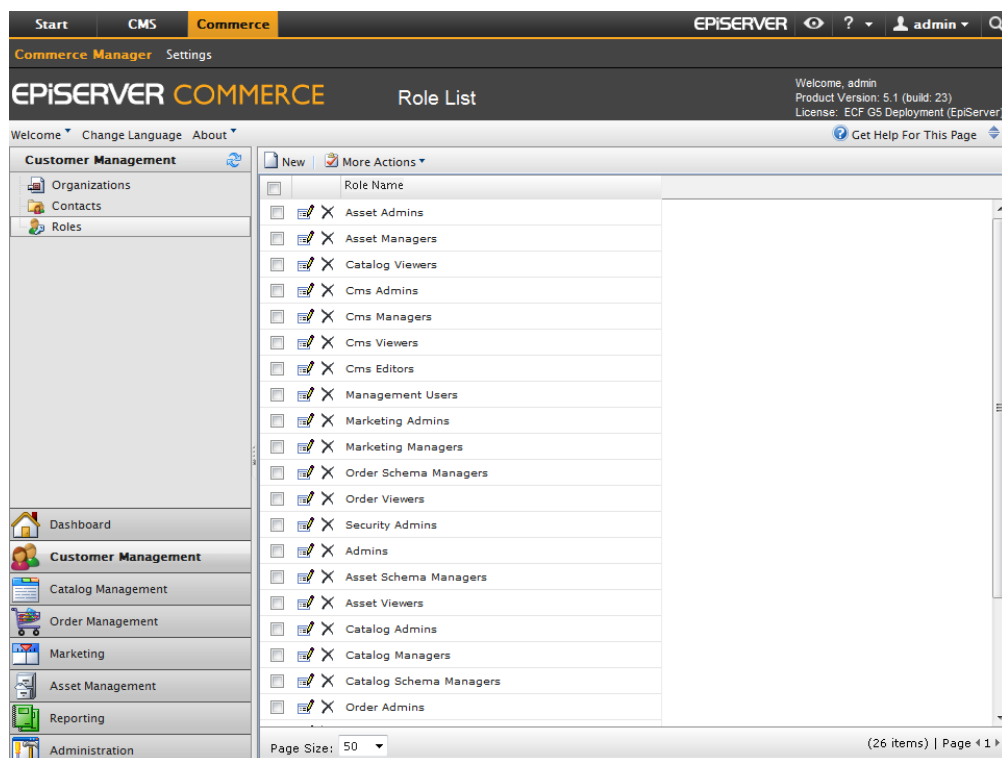
By default, EPiServer Commerce uses a customized role and membership provider where groups and users are stored in the Commerce Manager database. The information is then shared between EPiServer CMS and Commerce Manager. This means that the same users and groups will be available from the EPiServer CMS Admin mode as in Commerce Manager. Both website administrators and customers registering on the e-commerce site will be managed by the same provider and the user account information will be saved in the same place.

Most of the user and group/role management for the e-commerce website will be done from Commerce Manager. This includes managing user accounts and adding roles to users (contacts). Only when you need to set access rights for editorial content management of the website, will this be done from the EPiServer CMS Admin mode.

Access Rights in Commerce Manager

In Commerce Manager, users (contacts) and roles are managed in the Customer Management part of the system. EPiServer Commerce is built with flexibility in mind for structuring internal teams and departments as well as external organizations, partners and customers. The Customer Management system allows for creating users and groups with either **pre-configured Roles** or **custom Roles** which control access to different systems or individual elements within a system.

When you install EPiServer Commerce, you are provided with an **administration account**. This account is given full privileges, meaning it is full access to all systems and all elements within each system. Additional accounts used by your internal team to access Commerce Manager must have one or more **Roles** assigned to them. A role can be for instance "Catalog Viewers", "Marketing Admins" or "Asset Managers".





Commerce Manager users are internal to your organization and should not be confused with customers. By default, customers who register from your public site are given the "Everyone" and "Registered" Roles, but these roles do not allow access to Commerce Manager.

The specific roles used in Commerce Manager are described more in the Roles and Permissions section.

Access Rights in EPiServer CMS

In the EPiServer CMS Admin mode, you will be able to view all users and user groups under **Search User/Groups**.

The screenshot shows the EPiServer CMS Admin interface. The top navigation bar includes 'Start', 'CMS', and 'Commerce'. The 'CMS' tab is active, and the 'Admin Mode' is selected. The left sidebar has a tree view with categories: System Administration, Access Rights, Scheduled Jobs, and Tools. The 'Access Rights' category is expanded, showing options like 'Set Access Rights', 'Administer Groups', 'Search User/Group', and 'Create User'. The main content area is titled 'Search Users/Groups'. It contains a search form with a 'Type' dropdown set to 'Groups', a 'Name' input field, a 'Number of hits per page' dropdown set to '20', and a 'Search' button. Below the search form is a table listing user groups.

Name	Provider
Administrators	CMSRoleProvider
Admins	CMSRoleProvider
Asset Admins	CMSRoleProvider
Asset Managers	CMSRoleProvider
Asset Schema Managers	CMSRoleProvider
Asset Viewers	CMSRoleProvider
Catalog Admins	CMSRoleProvider
Catalog Managers	CMSRoleProvider
Catalog Schema Managers	CMSRoleProvider
Catalog Viewers	CMSRoleProvider
Cms Admins	CMSRoleProvider
Cms Editors	CMSRoleProvider
Cms Managers	CMSRoleProvider
Cms Viewers	CMSRoleProvider
Everyone	CMSRoleProvider

Setting access rights for editorial content and the page tree structure is done from the **Set access rights** section, just as you normally do in EPiServer CMS. Please refer to the EPiServer CMS administration documentation on world.episerver.com, for more information on how to work with access rights for editorial content.

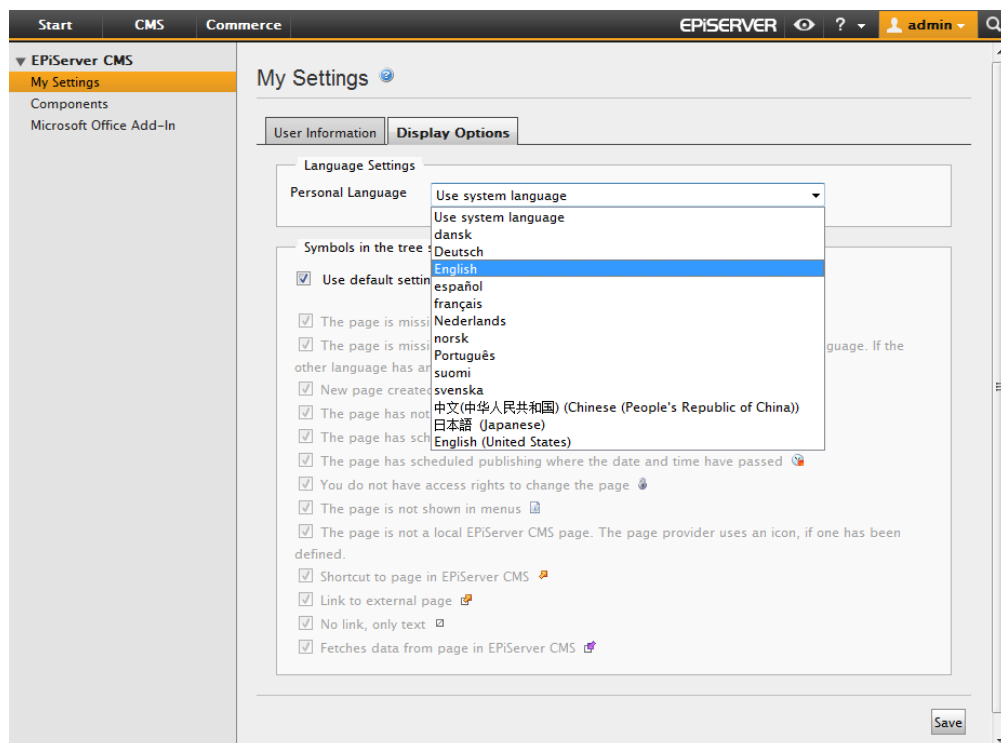
As with any EPiServer CMS website, you can work with role and membership providers from Windows or SQL, or both using the multiplexing setting. You can also build your own user and membership provider to be used with EPiServer Commerce. Find out more about membership and role provide management in the technical documentation for EPiServer CMS on world.episerver.com.

Globalization

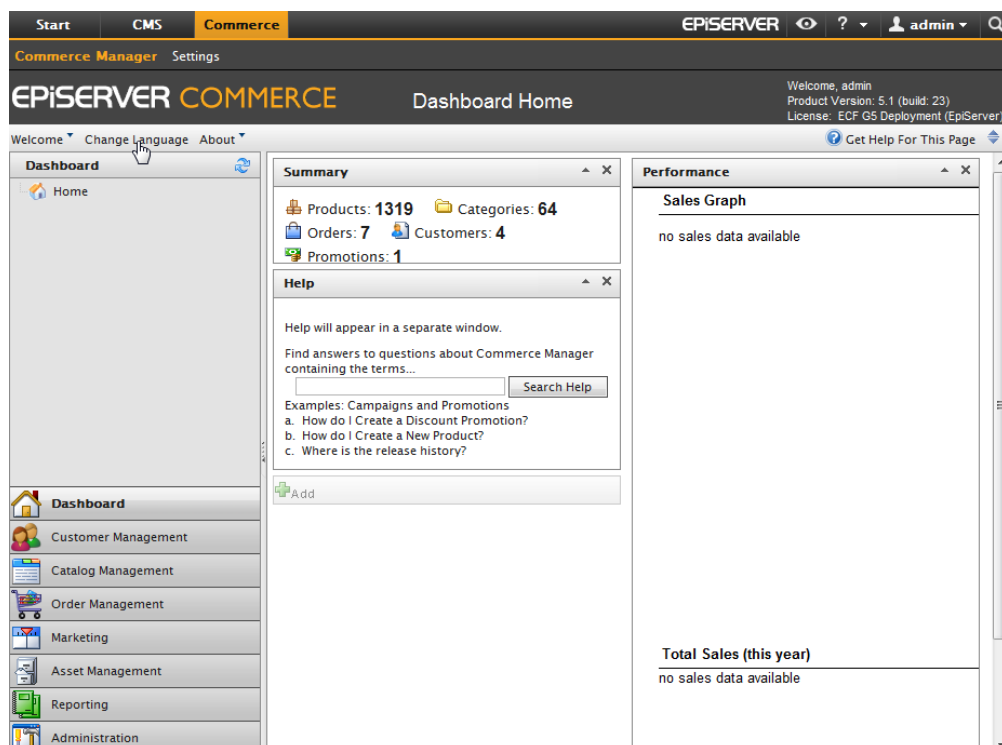
With "globalization" we mean the possibility to display **content** in different languages to website visitor groups with different language preferences. When a visitor to the website selects a language option, the content for that language will be displayed. If content doesn't exist in a selected language, a fallback procedure may be applied if this has been configured. Find out more about globalization and language management in the documentation for EPiServer CMS on world.episerver.com

Globalization also means the possibility to select different language options for the **user interface** inside EPiServer Commerce.

To set the user interface language for **EPiServer CMS**, click your **user profile name** in the upper right corner. Select **My Settings** and then the **Display Options** tab. Select the language of your choice in the list, and click **Save**. Note that you may need to refresh the browser window for the changes to apply.



To set the user interface language in **Commerce Manager**, select **Change Language** in the upper menu of Commerce Manager. Choose the language of your choice in the list and click **OK** to save your changes.



For editorial content created in EpiServer CMS, you will apply the language management options available in EpiServer CMS Edit mode, to create pages in different languages. For products in the product catalog, the language information is set in the product database. EpiServer Commerce will display the product information in the language selected by the website visitor.

Specific Language Settings

In EpiServer CMS there are three different language concepts, two which are defined by ASP.NET (Culture and UI Culture), and one which is the EpiServer content language. The ASP.NET Culture is referred to as "System Language", and UI Culture as "User Interface Language". A typical culture is "en-US" which defines the language as English (en) with the culturally defined specifics for United States (US).



In EpiServer Commerce, "UI Culture" is used and "English (United States)" is the default language used by the system. This is due to the Commerce Manager database which uses "UI culture" in the matching. In order for EpiServer Commerce to work properly, it is therefore essential that you are using the "UI Culture" setting on your website to make the different languages display correctly.

Make sure this is set up right from the start to avoid problems later on. It is important that users do not create EpiServer CMS pages using the "wrong" language type, since changing the page language later on is somewhat difficult. It is recommended that only "UI Culture" languages, i.e. "en-US", "en-GB", "nl-BE" etc., are enabled on the website.

Available languages for CMS pages are enabled from the EpiServer CMS Admin mode under **Config and Manage Website Languages**.

The screenshot shows the EPiServer Commerce Admin interface. The top navigation bar includes 'Start', 'CMS', and 'Commerce'. The left sidebar contains a menu with 'System Configuration', 'Security', and 'Tool Settings'. The main content area is titled 'Manage Website Languages' and includes a table of configured languages.

Move Up	Move Down	Name	Language Code	Enabled	System Icon	Template Icon
	↓	English	en	✓		
↑	↓	English (United Kingdom)	en-GB			
↑	↓	English (New Zealand)	en-NZ			
↑	↓	English (South Africa)	en-ZA			
↑	↓	Deutsch	de			
↑	↓	français	fr			
↑	↓	español	es			
↑	↓	svenska	sv	✓		
↑	↓	norsk	no			
↑	↓	dansk	da			
↑	↓	suomi	fi			
↑	↓	Nederlands	nl			
↑	↓	Nederlands (Belgie)	nl-BE			
↑	↓	Português (Brasil)	pt-BR			
↑	↓	English (United States)	en-US	✓		
↑	↓	Deutsch (Deutschland)	de-DE	✓		
↑		español (España)	es-ES	✓		

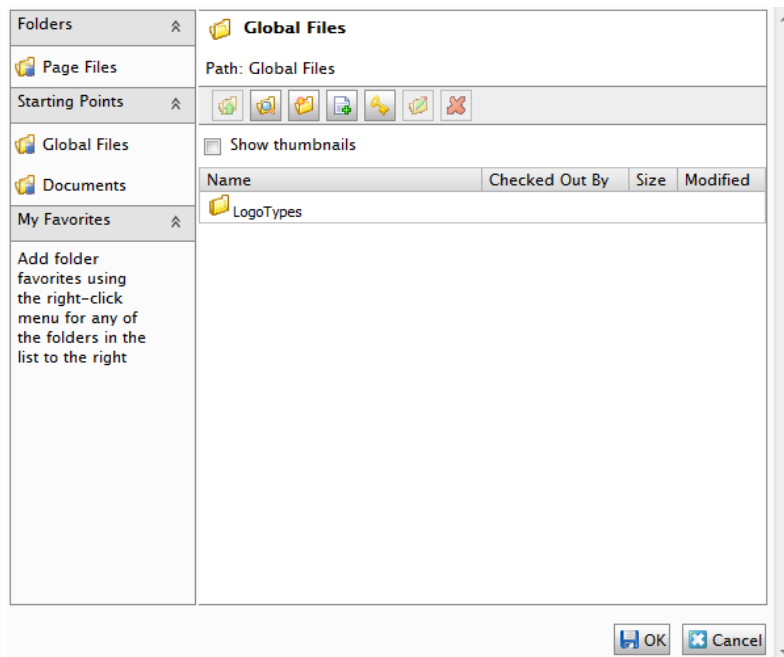
Languages for Product Catalogs

Languages for the content of a product catalog is set when you create the product catalog. Find out more about this under [Create a Catalog](#) in the [Catalog Management](#) section.

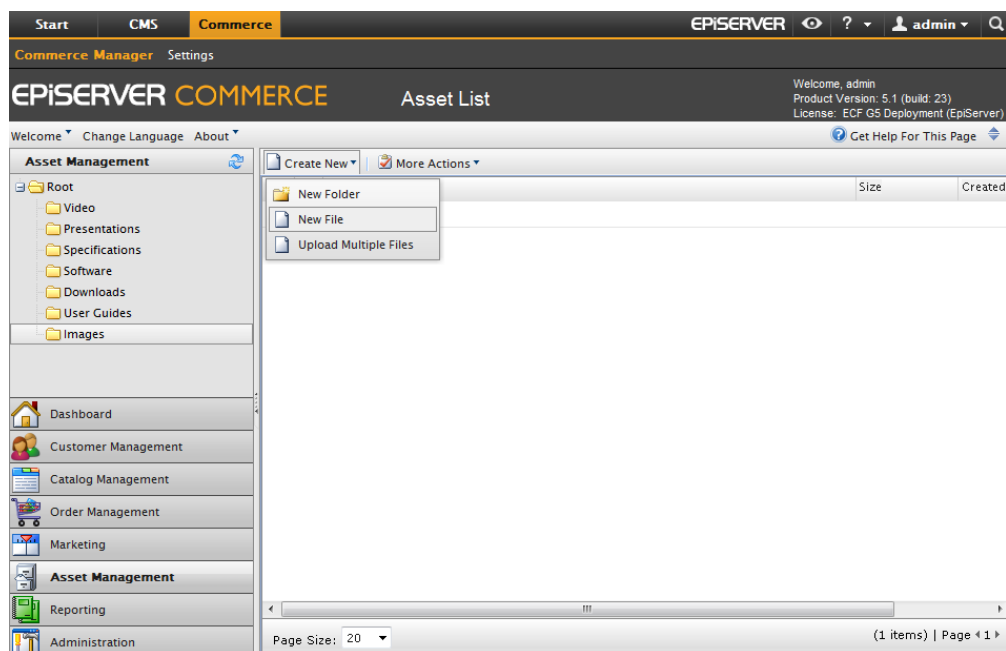
File Management

In EPiServer Commerce, files can be stored both in the **File Manager** of EPiServer, and in the folder structure under **Asset Management** in the Commerce Manager module.

Files such as images and documents, that are used in the editorial parts of the e-commerce website, are stored in the File Manager of EPiServer CMS, just as for any other EPiServer CMS site. With editorial content, we hereby mean web pages with content that is created from the EPiServer CMS Edit mode. For instance, this could be a news section with news items, or articles related to products on the e-commerce website.



The Asset Management folder structure is intended for storing documents related to products in the product catalog. This can be for instance user guides, software downloads or product sheets. Each asset file can then be related to a product in the product catalog.



To find out more about file management in EPiServer CMS; please refer to the EPiServer CMS user documentation. For more information about Asset management, please refer to the Asset Management section.

Commerce Manager

This section explains how end users can administer the EPiServer Commerce site by logging into the back-end Commerce Manager module. Commerce Manager includes the these sub-systems which are described in the following:

- Application Configuration
- Catalog Management
- Business Foundation
- Asset Management
- Customer Management
- Dashboard
- Marketing
- Order Management
- Reporting

Application Configuration

Application configuration includes various configuration tasks such as setting up shipping and payment gateways, your default language, currency, units, tax configuration, licensing, and search settings. Often, these settings are not configured by business users. Most of these configuration tasks are performed in the Commerce Manager Administration area.

System Configuration

Most of the application configuration information is stored in the database. These settings can be edited through the Commerce Manager. In most cases, you will not need to restart the web applications and the changes should be effective immediately.

Indexing Your New or Edited Catalog

In order to see products in a new catalog or changes to an existing catalog, you will need to index your catalog to reflect those changes in your search results.

There are two types of indexing -- **Build** and **Rebuild**. Use Build to make a quick re-indexing of an existing catalog where you made changes to existing products. Build is shorter than a Rebuild because it performs a reindexing of only the items that were changed since the last Build.

If you are using a brand new catalog or you made structural changes to your existing catalog (i.e. moving categories around, changing a product name, etc.), then you will need to perform a **Rebuild**. Rebuild takes longer because it does a complete indexing.

To Build or Rebuild your catalog, go to **Administration > System Settings > Search Index**.

Once you perform either of these 2 operations, you will see the changes or additions reflected in your search results.

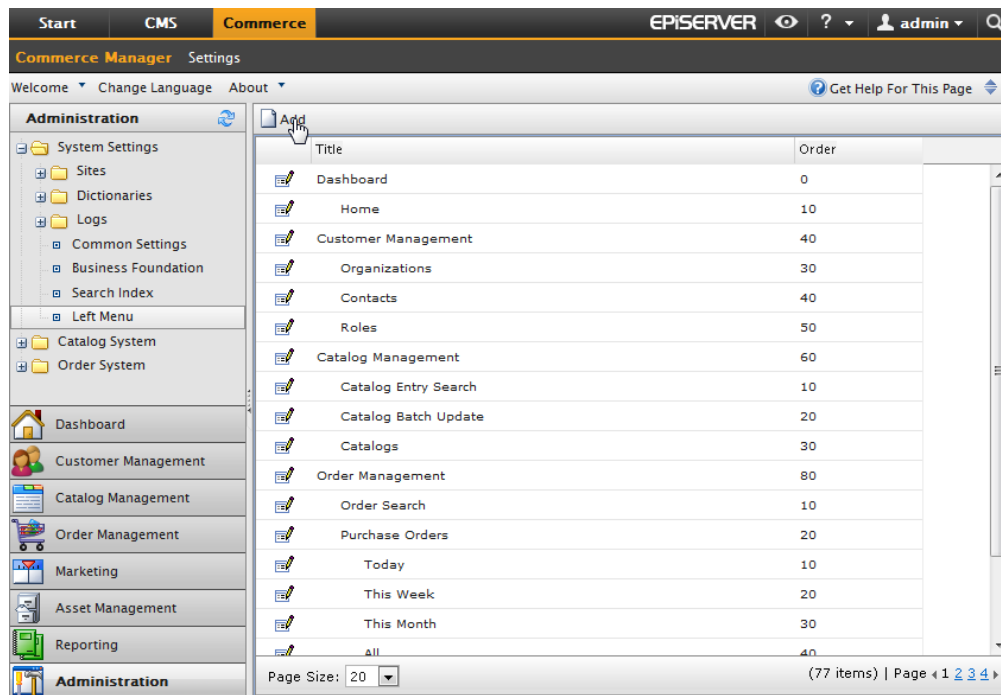
If you have the Quartz service installed (this can be installed automatically during the SDK install), then your catalog is reindexed every 5 minutes or whatever time interval you decide upon.

Customizing Left Menu

Prior to customizing your left menu, we advise you to read the publication section of Business Foundation to configure Business Objects as individual nodes in the left navigation frame.

Adding a Left Menu Item from the Left Menu Page

To add a **Left Menu** item, you have two choices. You can either configure the entire menu item first within Business Foundation or you can add an empty container by clicking the **Add** button and then go back to Business Foundation to fill in the page contents (objects).



A new window will pop up for publication settings.

1. Select a **Display Region** from the navigation tree on the left. Click on the node you want Contract to be placed under. For example, Contract will be placed on the root level of Customer Management.
2. The **Display Text** defaults to the system name of the Business Object. You can choose to keep the name or change it.
3. Enter in an **Item Link**, an URL to a page. When the object is clicked, a new window will appear on the right based on the given link.
4. The **Display Order** defaults to 10000. You can keep it at that number or change the value to determine the position of the node.
5. **Access Permissions** is autopopulated only when a menu is created through the Business Foundation. When creating a new left menu from scratch, you may leave this field blank or otherwise copy in permissions from other existing menus. If you want to change Access Permissions, refer to the Permissions section.
6. An **Item Icon** can be uploaded to represent the node. Click **Browse** to upload an icon.
7. Once all relevant information is entered, click on **Publish**.

Adding

Dashboard	0
Customer Management	40
Catalog Management	60
Order Management	80
Marketing	100
Asset Management	120
Reporting	130
Administration	200

Display Region: Customer Management

Display Text: Contracts

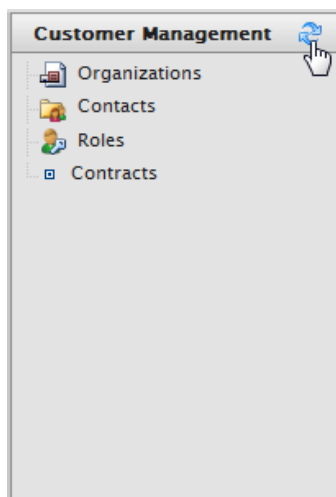
Item Link:

Display Order: 10000

Access Permissions:

Item Icon:

To verify if the object was published, go to the **Display Region** where you specified the object to be published to. Click on the **Refresh** icon on the left navigation frame if you at first do not see the new node.



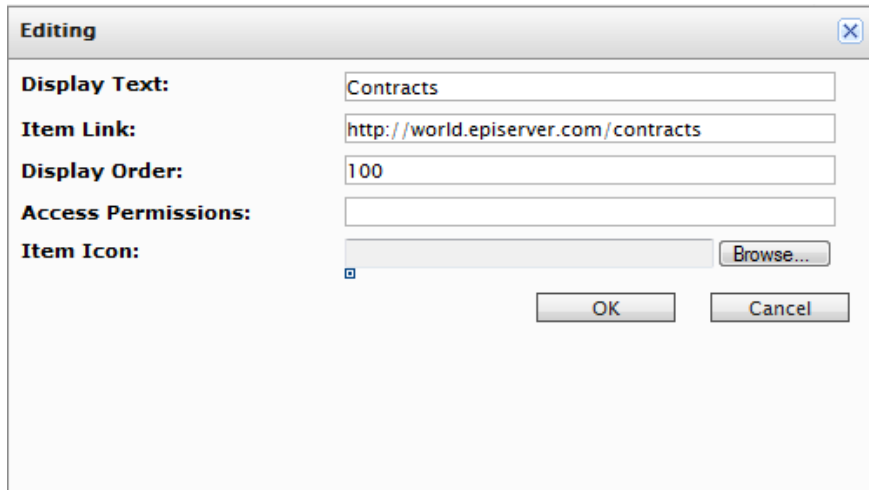
Editing, Ordering, or Deleting a Left Menu Item

To **Edit** a user-generated node in the left menu, click on the **Notepad** icon.

Add

Title	Order
Dashboard	0
Home	10
Customer Management	40
Organizations	30
Contacts	40
Roles	50
Contracts	10000
Catalog Management	60
Catalog Entry Search	10

If the left menu item was created via the **Left Menu** page, this popup window will appear.

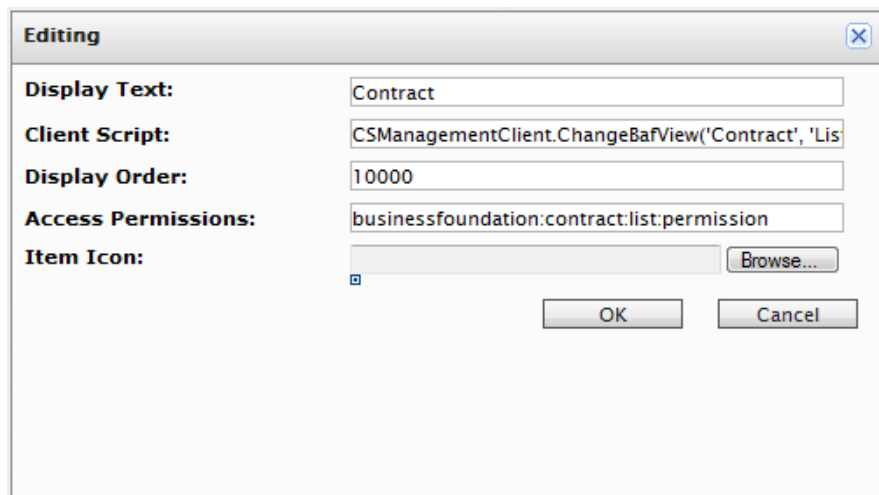


The 'Editing' popup window contains the following fields and controls:

- Display Text:** Text box containing 'Contracts'.
- Item Link:** Text box containing 'http://world.episerver.com/contracts'.
- Display Order:** Text box containing '100'.
- Access Permissions:** Empty text box.
- Item Icon:** Text box with a small square icon next to it, and a 'Browse...' button to its right.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

If the left menu item node was created using **Business Foundation**, this popup appears.

To change the sort order of the left menu item, adjust the numerical value in **Display Order**. The lower the value, the higher the position of the item within the navigation tree relative to items with a higher Display Order value.



The 'Editing' popup window contains the following fields and controls:

- Display Text:** Text box containing 'Contract'.
- Client Script:** Text box containing 'CSManagementClient.ChangeBafView('Contract', 'Lis'.
- Display Order:** Text box containing '10000'.
- Access Permissions:** Text box containing 'businessfoundation:contract:list:permission'.
- Item Icon:** Text box with a small square icon next to it, and a 'Browse...' button to its right.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

To save changes, click **OK**.

To delete a left menu item, click on **X** icon.

Title	Order
Dashboard	0
Home	10
Customer Management	40
Organizations	30
Contacts	40
Roles	50
Contracts	100
Log Management	60
Catalog Entry Search	10
Catalog Batch Update	20
Catalogs	30
Order Management	80
Order Search	10
Purchase Orders	20
Today	10
This Week	20
This Month	30
All	40
Purchase Orders By Status	30
Carts	40

Page Size: 20 (78 items) | Page 1 2 3 4

Commerce Configuration

This section covers how to setup EpiServer Commerce with payment methods using built-in Payment Gateways and setup the default Language, Currency, and Units.

Payment Gateways

When creating and configuring payment methods in EpiServer Commerce, there are three components that need to be created or re-used as well as configured: Payment Types, Payment Gateways and Payment Methods.

Payment Types – Payment types are classes which contain the properties of a particular payment type. For example, a credit card payment type contains credit card number, card expiration date, card type, etc. All payment types inherit from the abstract class Payment. The most common payment types are already built-in to EpiServer Commerce:

- Credit card
- Cash Card
- Gift Card
- Invoice

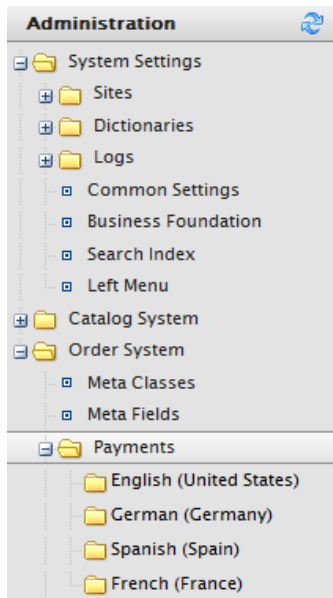
In addition, a generic OtherPayment type is included in EpiServer Commerce. Payment types are meta classes.

Payment Gateways – Payment gateways provide an interface to the system which provides payment processing. A payment type is passed to the payment gateway and the gateway executes the payment transaction with the payment system (e.g. PayPal). One payment type is associated with each payment gateway.

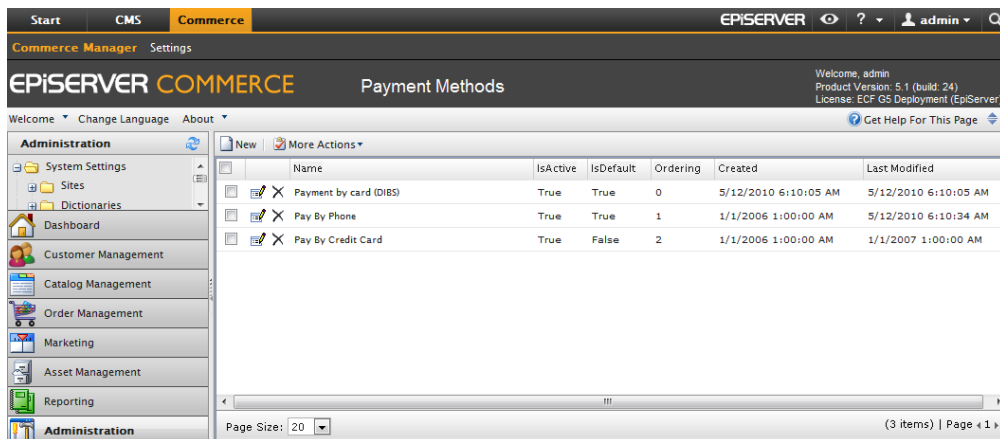
Payment Methods – Payment methods contain information about the way the customer views a payment option and has a payment gateway associated with it.

Using a Built-In Payment Gateway

To setup payments using a built-in Payment Gateway, go to **Administration -> Language** (English, German, Spanish, etc.)



The **Payment Methods** window appears. By default, "Payment by Card (DIBS)", "Pay by Credit Card" and "Pay by Phone" are already setup.



To create a new **Payment Method**, click on **New** to open the **Payment Method Edit** screen.

MERCE Payment Method Edit

Overview Parameters

ID:

Name:

Description:

System Keyword:

Language: select language

Class Name: (none)

Sort Order: 0

IsActive: ☐ Yes ☒ No

IsDefault: ☐ Yes ☒ No

Supports Recurring: ☐ Yes ☒ No

Restricted Shipping Methods

Available Shipping Methods

Default Shipping
Online Download

Chosen Shipping Methods

Add ->
Add All ->>
<- Remove
<<- Remove All

OK Cancel

Here is an explanation of some of the gateway properties:

- **ID** – the system-assigned unique identifier for the payment gateway
- **Name** – the name to be displayed to the user
- **Description** – a description that can be displayed to the user
- **System Keyword** – the unique name for each instance of the gateway; new non-unique keywords will not save to the database. This is not be editable after a gateway is initially created
- **Language** – allows a specific language to be specified for the payment gateway
- **Class Name** – name of the gateway class to be associated with the payment
- **Sort Order** – specifies the order of the payment method on the list of payment methods page
- **IsActive** – specify whether or not the payment method is active\
- **IsDefault** – specific whether or not the payment method is the default one
- **Supports Recurring** – specify whether this payment methods supports recurring payments, such as for subscriptions
- **Restricted Shipping Methods** – Restricted shipping methods is not fully implemented

out of the box and requires a developer to complete the functionality.

Restricted Shipping Methods

Available Shipping Methods		Chosen Shipping Methods
Default Shipping	Add -> Add All ->> <- Remove <<- Remove All	
Online Download		

Restricted Shipping Methods

Available Shipping Methods		Chosen Shipping Methods
Online Download	Add -> Add All ->> <- Remove <<- Remove All	Default Shipping

Click **OK** to save the **Payment Method**. The payment method will appear in the list of Payment Methods.













MERCE

Payment Methods

Welcome, admin
Product Version: 5.1 (build: 24)
License: ECF GS Deployment (EpiServer)

Get Help For This Page

NewMore Actions

	Name	IsActive	IsDefault	Ordering	Created	Last Modified
   Money Order	False	False	0	Today, 10:45 AM	Today, 10:45 AM	
   Payment by card (DIBS)	True	True	0	5/12/2010 6:10:05 AM	5/12/2010 6:10:05 AM	
   Pay By Phone	True	True	1	1/1/2006 1:00:00 AM	5/12/2010 6:10:34 AM	
   Pay By Credit Card	True	False	2	1/1/2006 1:00:00 AM	1/1/2007 1:00:00 AM	

Setting up Payment Methods using nSoftware Provided Payment Gateways

EPiServer Commerce supports multiple payment gateways out of the box using nSoftware that end user can easily setup without the need for a developer.

1. To enable nSoftware supported gateways, create a new payment method
2. Enter in a **Name**, such as nSoftware or anything else
3. Enter in a **Description**
4. Enter in the **System Keyword** as "ICharge"
5. Select a **Language** from the dropdown menu
6. Select the **Class Name** "Mediachase.Commerce.Plugins.Payment.ICharge.IChargeGateway"
7. Select "Yes" for **IsActive**

8. Change the **Sort Order**, **IsDefault**, **Supports Recurring** as needed
9. Click **OK** to save changes

MERCE Payment Method Edit

Overview Parameters

ID:

Name:

Description:

System Keyword:

Language:

Class Name:

Sort Order:

IsActive: ☐ Yes ☒ No

IsDefault: ☐ Yes ☒ No

Supports Recurring: ☐ Yes ☒ No

Restricted Shipping Methods

Available Shipping Methods		Chosen Shipping Methods
Default Shipping Online Download	<input type="button" value="Add ->"/> <input type="button" value="Add All ->>"/> <input type="button" value="←- Remove"/> <input type="button" value="←←- Remove All"/>	

Once created, click on the payment gateway again to go back to the **Payment Method Edit** page. Click on the **Parameters** tab.

The **Configure IBiz E-Payment Integrator Component** appears and you can select from the **Gateway** drop-down menu several dozen of the most popular payment gateways will appear. Depending on the gateway you select, such as Authorize.Net, the **Configuration Parameters** will change. Enter in your credentials and other relevant information to activate the gateway and click **OK**.

Overview Parameters

Configure IBiz E-Payment Integrator Component

Gateway: Authorize.Net

Get IBiz E-Payment Integrator from www.nsoftware.com. You will find more documentation on how to configure it there also.

Configuration Parameters

Payment Options: Sale

*Merchant Login:

Merchant Password:

Transaction Key:

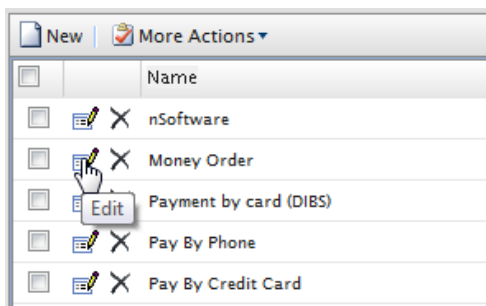
Secret Hash:

Payment Gateway URL (used for testing):

OK Cancel

Editing Payment Methods

To edit an existing payment method, click on the **Notepad** icon next to the **Delete** icon.



The ID is autogenerated. Every field can be changed except System Keyword. After you are satisfied with your changes, click on OK.

MERCE Payment Method Edit

Overview Parameters

ID: e0fbbe1d-053f-4adc-b15c-669374639502

Name: Money Order

Description:

System Keyword: iCharge

Language: English (United States)

Class Name: EPiServer.Business.Commerce.Payment.DIBS.DIBSPaymentGateway

Sort Order: 0

IsActive: ☐ Yes ☒ No

IsDefault: ☐ Yes ☒ No

Supports Recurring: ☐ Yes ☒ No

Restricted Shipping Methods

Available Shipping Methods

Online Download

Chosen Shipping Methods

Default Shipping

Add ->

Add All ->>

<- Remove

<<- Remove All

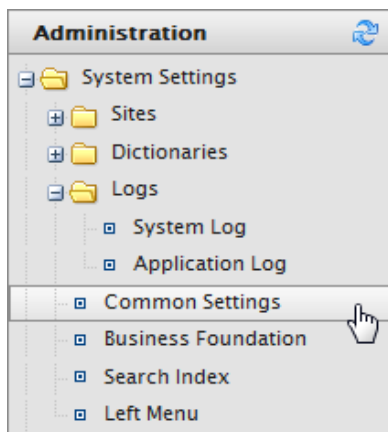
OK Cancel

Deleting Payment Methods

To delete **Payment Methods**, click on the **X** icon next to the payment method name and click **OK** when the popup appears. To delete multiple payment methods at once, check mark each payment method you want to delete, then click on **More Actions --> Delete** on the dropdown menu. Click **OK** when the popup appears.

Setting Your Default Language, Currency and Units

To set your default language, currency or unit, login to the Commerce Manager and go to the **Administration --> System Settings --> Common Settings** and make appropriate selection.



Out of the box, you have the following options:

- **Language** - English, German, Spanish, French
- **Currency** - US dollars, Canadian dollars, Euros, Yen, Pound sterling and many others
- **Length units** - meters, feet
- **Weight units** - kilograms, pounds

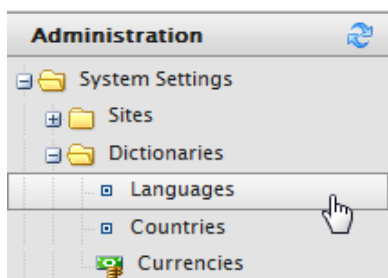
Click **OK** to save your changes.

Creating Dictionary Values for Adding Languages, Countries and Currencies

This guide walks you through how to add Languages, Countries, and Currencies to EPiServer Commerce.

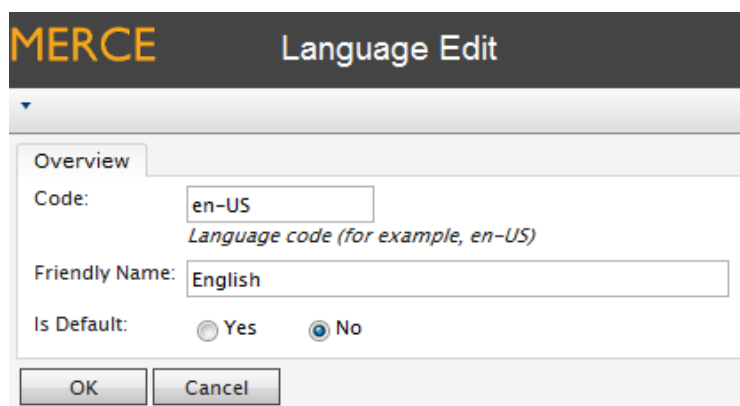
Adding New Languages

By default, you are given several **Language** options. To add a new Language, login to Commerce Manager and go to **Administration --> System Settings --> Dictionaries --> Languages**.



When you click **New Language** fill in the following:

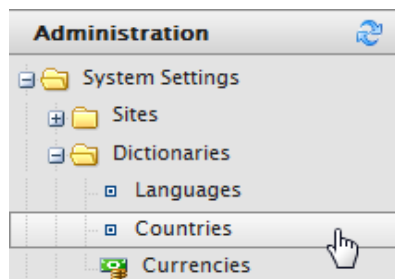
- **Language Code** - to obtain code, go to this MSDN site: <http://msdn.microsoft.com/en-us/library/ms533052%28VS.85%29.aspx> (you must use the codes that contain dashes "-")
- **Friendly Name** - this name is displayed in the front-end public site language drop-down and various Commerce Manager admin pages
- **Is Default** - Yes/No



Click **OK** to save the language.

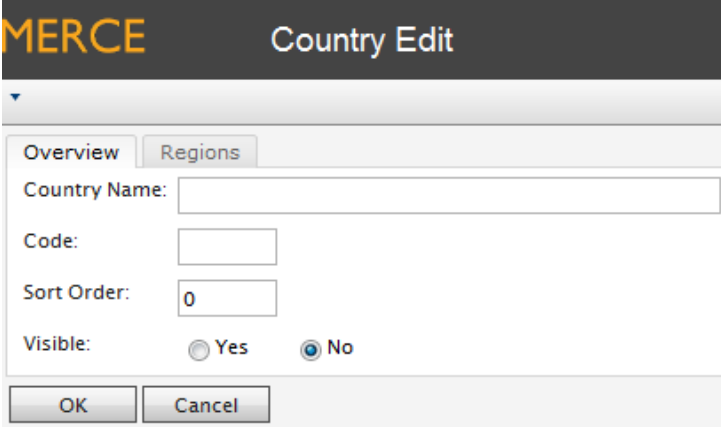
Adding New Countries

To add a new Country, login to Commerce Manager and go to **Administration > System Settings > Dictionaries > Countries**.



Click on **New Country** and fill in the following displayed in the **Overview** tab:

- **Country Name** - this is the friendly name that is displayed in the public site during the checkout process
- **Code** - to obtain the code, go to this MSDN site <http://msdn.microsoft.com/en-us/library/ee799297%28CS.20%29.aspx> (use the ISO Short Code or ISO Long Code as long as you remain consistent)
- **Sort Order** - enter a number starting from 0 (the lower number is listed on the top of the dropdown)
- **Visible** - Yes/No



MERCE Country Edit

Overview Regions

Country Name:

Code:

Sort Order:

Visible: ☐ Yes ☒ No

OK Cancel

Regions refer to states, provinces or prefectures. In the **Region** tab, fill in the following:

- Type a **Friendly Name** (e.g. CA - this will be displayed in the public site during the checkout process) and click **Add**. You can checkmark it either as **Visible** or not on the public site



Overview Regions

New Region Name

Regions:

Edit Command	Name	Ordering	Visible
 	CA	0	<input checked="" type="checkbox"/>

OK Cancel

When you click the **Edit** icon, you can change the **Ordering** of the region. Click **Update** to save those changes.

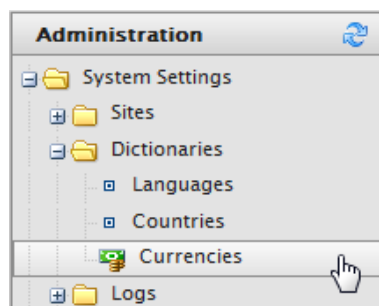


Regions:

Edit Command	Name	Ordering	Visible
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	CA	<input type="text" value="0"/>	<input checked="" type="checkbox"/>

Adding New Currencies

To add a new **Currency**, login to Commerce Manager and go to **Administration > System Settings > Dictionaries > Currencies**.



Click on **New Currency**. Fill in the following displayed in the **Overview** tab:

- **Currency Name** - this name is displayed in the front-end public site currency drop-down and various Commerce Manager admin pages

- **Code** - this currency code needs to be obtained from this site http://en.wikipedia.org/wiki/ISO_4217#Active_codes

The screenshot shows the 'MERCE Currency Edit' dialog box with the 'Overview' tab selected. It contains the following fields: 'Currency Name:' with a text input, 'Code:' with a text input, and 'Modified:' with a text input. At the bottom are 'OK' and 'Cancel' buttons.

In the **Rates** tab, you can **Add Rates** which are the foreign exchange rate when you want to convert from one currency to another.

The screenshot shows the 'MERCE Currency Edit' dialog box with the 'Rates' tab selected. It features an 'Add Rate' button with a hand cursor icon. Below it is a table with columns: 'Edit Command', 'Currency', 'Rate', 'Rate Date', and 'Modified'. At the bottom are 'OK' and 'Cancel' buttons.

When the **Edit Currency Rate Information** popup appears, enter in:

- **To Currency** - select from the drop-down the Currency to convert to from the current currency
- **End of Date Rate** - enter in the End of Day rate
- **Average Rate** - enter in the Average rate* *
- **Currency Rate Date** - enter in a Currency Rate Date

Then click on **Save Changes**.

The screenshot shows the 'Edit Currency Rate Information' popup window. It contains the following fields: 'From Currency:' with the value 'Australian dollar (AUD)', 'To Currency:' with a dropdown menu showing 'Canadian dollar', 'End Of Day Rate:' with a text input containing '0.0000', 'Average Rate:' with a text input containing '0.0000', 'Currency Rate Date:' with a date input showing '5/25/2010' and a time input showing '11:25 AM', and 'Modified:' with the value '5/25/2010 11:25:12 AM'. A 'Save Changes' button is located at the bottom right.

Shipping

This guide will walk you through how to setup Shipping Methods, Shipping Providers and Shipping Gateways.

Shipping Method - A shipping method manages a set of information and rules that determines the shipping cost and displays it on the front-end public site while a customer checks out an item from his/her shopping basket. The shipping fee is added to the total price of the purchase. A shipping method is mapped to a shipping provider visible

to a back-end administrator in Commerce Manager. This allows the public site to display friendly names such as "Ground Shipping" to the customer and this is mapped to a provider such as UPS. Therefore, when a customer picks "Ground Shipping," he/she will be using UPS.

Shipping Providers - A shipping provider is the class(es) that interacts directly with one or more actual shipping services such as USPS, UPS, or FedEx. It retrieves shipping price information from the shipping service(s) its associated with. One typical scenario would be to have a provider that represents a particular service (e.g. USPS). A provider can also represent a particular type of shipping situation. One example is that you could have a provider for overnight delivery. The provider could retrieve pricing for that service to determine the lowest price given the location of the customer. A provider could also represent other specific scenarios with one or more services such as price by weight or ground shipping.

Shipping Gateways - Under Shipping Providers, a shipping gateway is the specific class that you select (Generic Gateway or Weight/Jurisdiction Gateway).

There are two options out of the box for shipping gateways: 1) Generic Gateway (flat shipping rate) and 2) Weight/Jurisdiction Gateway (base price + additional fee depending on weight and shipping location). You select the shipping gateway in the Shipping Provider screen and then configure the actual values for that gateway/provider in the Shipping Methods area.

Shipping Jurisdictions - an option which allows you to define values for region-specific shipping rates; this is only used when you select the Weight/Jurisdiction Gateway (i.e. California)

Shipping Jurisdiction Groups - group of jurisdictions; this is required because this is a required field when configuring the Shipping Method parameters (i.e. Southwest region)

Shipping Methods

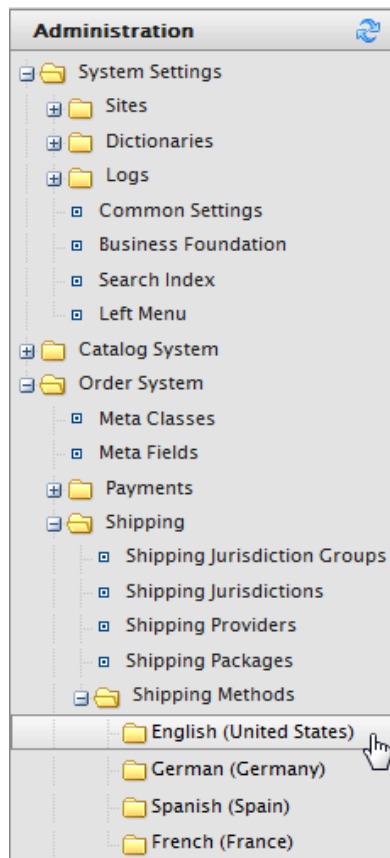
A **Shipping Method** manages a set of information and rules that determines the shipping cost and displays it on the front-end public site while a customer checks out an item from his/her shopping basket. The shipping fee is added to the total price of the purchase.

A shipping method is mapped to a **Shipping Provider** visible to a back-end administrator in Commerce Manager. This allows the public site to display friendly names such as "Ground Shipping" to the customer and this is mapped to a provider such as UPS. Therefore, when a customer picks "Ground Shipping," he/she will be using UPS.

Customizing Shipping Methods

There are two **Shipping Methods** available out of the box for you to customize: Ground Shipping and Fixed Shipping.

To customize the Shipping Methods, first go to **Administration > Order System > Shipping > Shipping Methods > English (United States)** or any other languages.



At the **Shipping Methods List** screen, select the edit icon for either of the available methods. The **Overview** tab screen for **Shipping Method Edit** will load with the below fields:

Overview		Settings	Parameters
ID:	a1ca1bca-6fbf-4b6f-b01f-bbf3df23a02a		
Name:	<input type="text" value="Default Shipping"/>		
Friendly Name:	<input type="text" value="Ground Shipping"/>		
Description:	<input type="text" value="Calculates shipping based on weight and zone."/>		
Provider:	<input type="text" value="Weight/Jurisdiction Gateway"/>		
Language:	<input type="text" value="English (United States)"/>		
Base Price:	<input type="text" value="2.00"/>		
Currency:	<input type="text" value="US dollar"/>		
IsActive:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
IsDefault:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Sort Order:	<input type="text" value="0"/>		
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			

- **ID** - this is auto-generated after saving the new shipping method
- **Name** - enter in a name without spaces or special character; this name will not be displayed in the public site, but is only for end users to manage and organize the shipping methods

- **Friendly Name** - enter a friendly name which can have spaces and special character; the friendly name is the name seen by customers who are purchasing items
- **Description** - enter a description (optional)
- **Provider** - select an available provider from the dropdown menu; the options displayed here are created in the Shipping Providers screen (*Generic Gateway* is for a fixed shipping fee specified below under base price, while *Weight/Jurisdiction Gateway* is used for a shipping fee depended on the weight and shipping location)
- **Language** - select a language of your choice from the dropdown menu
- **Base Price** - the base price you specify here will become the fixed shipping fee for the *Generic Gateway* option, and part of the *Weight/Jurisdiction Gateway* option.
- **IsActive** - select Yes or No under IsActive to enable or disable it, respectively
- **IsDefault** - select Yes or No if this shipping method is the default one
- **Sort Order** - enter a number for the sort order to determine its position on the list of shipping methods

The **Settings** tab is used to exclude any Countries, Regions, and Payments from a particular shipping method. To exclude a selection, highlight the items on the **Available** boxes on the left and move them to the **Chosen Countries** boxes by clicking **Add**.

Overview
Settings
Parameters

Restricted Countries

Available Countries

- Afghanistan
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda
- Argentina

Add ->
Add All ->>
<- Remove
<<- Remove All

Chosen Countries

Restricted Regions

Available Regions

- Alabama
- Alaska
- American Samoa
- Arizona
- Arkansas
- Armed Forces Africa
- Armed Forces Americas (except C)
- Armed Forces Canada
- Armed Forces Europe
- Armed Forces Middle East

Add ->
Add All ->>
<- Remove
<<- Remove All

Chosen Regions

Restricted Payments

Available Payments

- Payment by card (DIBS)
- nSoftware
- Pay By Phone
- Pay By Credit Card

Add ->
Add All ->>
<- Remove
<<- Remove All

Chosen Payments

OK
Cancel

The **Parameters** tab is used to set conditions to determine the shipping fee. This screen becomes available only when the Weight/Jurisdiction Gateway is selected in the **Provider** field in the Overview tab (it will be empty with the Generic Gateway option).

Overview
Settings
Parameters

Configure Price Per Weight for Jurisdiction Group

Jurisdiction Group: United States

Weight: or more

Price:

Start Date: 5/25/2010 12:00 AM

End Date: 5/25/2011 10:55 AM

Add

Group Name	Weight	Price	Start Date	End Date	Edit	Delete
United States	0 or more	10	10/8/2008 12:00:00 AM	10/8/2020 12:00:00 AM	Modify	Delete

OK
Cancel

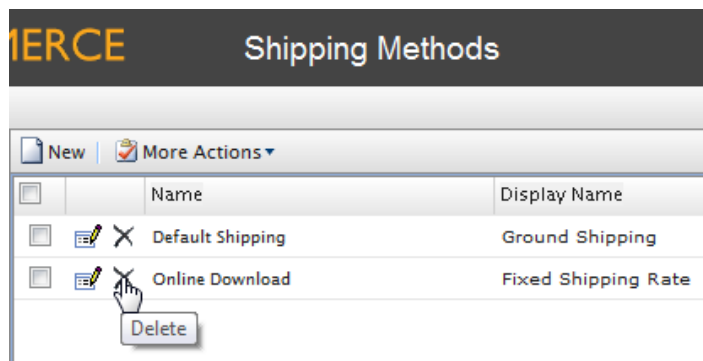
- **Jurisdiction Group** - select a jurisdiction group to apply the current **Shipping Method** using the drop-down menu; the options listed here are set up in the **Shipping Jurisdictions** and **Shipping Jurisdiction Groups** screen.
- **Weight** - enter a numerical value for the weight; units for the weight is set in the the Common Settings screen
- **Price** - enter a price to be added to the base price (**Overview** tab) when the weight and jurisdiction group conditions are met.
- **Start Date** - enter a start date and time for the shipping method to take effect
- **End Date** - enter a end date and time for the shipping method to expire

When finish entering the values above, select **Add** to save the condition. The condition will appear on table below. In the above example, if the customer checks out an item that weights anywhere between 0 to 10 weight units (lbs for example), and the customer's shipping address is in the United States, then the total shipping fee will equal \$10 + the base price you enter in the overview screen.

Click **OK** to save changes.

Deleting Shipping Methods

1. Check off the box that corresponds to the shipping methods you want to delete.
2. Click on the More Actions button on the upper left corner of the main window menu bar, and choose **Delete** from the pull down menu.
3. Click **OK** when prompted. The selected methods will be deleted from the list.



Shipping Providers

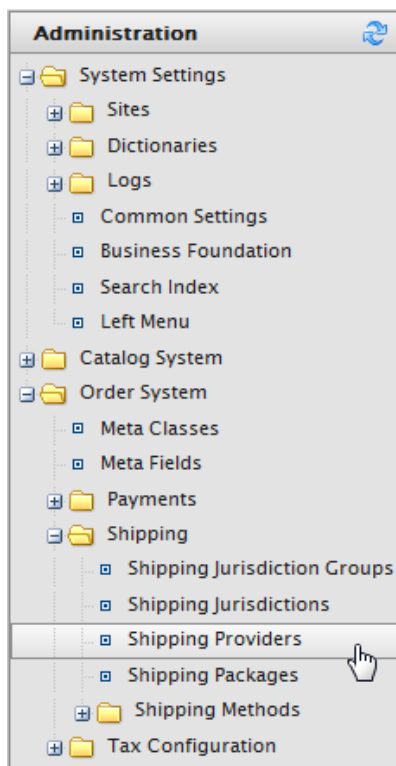
A **Shipping Provider** is an actual service such as USPS, UPS, or FedEx. However, a provider can also be a "type" of shipping in order to determine shipping price. For example, one can have a "Percentage of Total Cost" provider or "Fixed Price" provider. In this case, the shipment "types" can be associated to one of the existing providers (i.e. USPS, UPS, FEDEX).

The Shipping Providers page manages the list of these providers/types. There are two shipping methods available out of the box for you to customize: 1) Generic Gateway and 2) Weight/Jurisdiction Gateway.

A Generic Gateway is used for a fixed shipping fee while Weight/Jurisdiction Gateway is used for a shipping fee that is calculated based on the weight and shipping location.

Customizing Shipping Providers

Go to **Administration > Order System > Shipping > Shipping Providers**. Edit one of the two providers listed.



1. Edit **Name**, and **Description**
2. **System Keyword (no spaces)** and **Classes** are something that your developers need to code and provide.
3. Click **OK** to save changes

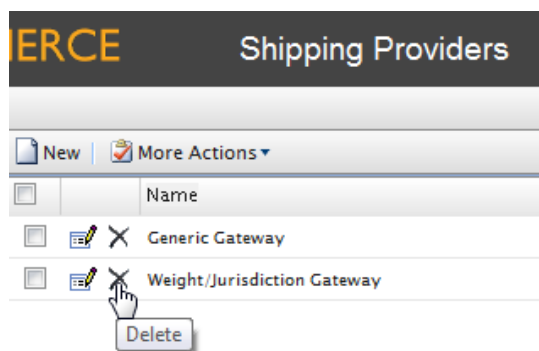
The revised shipping provider will appear in the **Shipping Providers** page.



The **Parameters** and **Packages** tabs are not fully implemented; they serve as a starting point for developers for full implementation of those features.

Deleting Shipping Providers

1. Go to the **Shipping Providers** page
2. Check off the box that corresponds to the shipping providers you want to delete.
3. Click on the **More Actions** button on the upper left corner of the main window menu bar, and choose **Delete** from the pull down menu.
4. Click **OK** when prompted. The selected providers will be deleted from the list.



Tax Configuration

Introduction

Taxes can be configured in the Administration subsystem so that specified rates are calculated and added to the total price during the checkout process. Depending on your configuration, it is also possible to combine and apply multiple taxes (such as federal, state and local tax) to a purchase.

Taxes can be set up and maintained using two methods: 1) creating/editing each tax control manually or 2) importing all data using a CSV file. Here we will discuss both methods and also provide you with a few examples to demonstrate how this works.

Method 1: Configuring Taxes Manually

To set up your taxes manually, you will need to work with the following areas in the **Administration** tab of the Admin Site – **Tax Categories, Tax Jurisdiction Groups, Tax Jurisdictions, and Taxes** – as well as the configuration pages for each of the catalog items.

The steps below summarize the process you need to follow to configure taxes.

1. **Create and configure Countries and Regions (Go to Administration > System Settings > Dictionaries > Countries):** In Countries section create the countries you plan to sell your products in and set the appropriate country codes. For the country codes, it is important that you use the **ISO Short** code provided in the following link (<http://msdn.microsoft.com/en-us/library/ms866171.aspx>). Using the **ISO Long** code or anything else will not correctly calculate taxes during checkout.
2. **Create new Tax Categories (Go to Administration > Catalog System):** In this step you will create tax categories that will be used later to associate your catalog items with the tax rates you define. For example you may create categories such as "General Sales," "Food," and "Luxury Items" depending on the tax regulations for your item types. The categories you create here will become selectable on the Page Details of your items (i.e., Variations/SKU Edit page) and on the **Tax Edit** page.
3. **Create and configure Tax Jurisdictions (Go to Administration > Order system > Tax Configuration):** In this step you will specify particular Tax Jurisdictions. You can create different Tax Jurisdictions for a particular region by specifying zip codes, country codes, etc. Tax rates will be applied to whatever level of information you specify for each Jurisdiction. For example, if you specify only the country code as US, all shoppers with a US address (regardless of state, county etc.) will be included in this jurisdiction. **Note:** Country Code and Region Code you enter in the **Jurisdictions Edit** page must match the codes you used in step 1.
4. **Create and configure new Tax Jurisdiction Groups (Go to Administration > Order system > Tax Configuration):** New Tax Jurisdiction Groups created here can include multiple Tax Jurisdictions.
5. **Create and configure Taxes (Go to Administration > Order System > Tax Configuration):** Here you will specify tax rates and also associate the Tax Categories and Jurisdiction groups created in Steps 2 and 4.
6. **Associate Catalogs to the Tax Categories** created in Step 2 (Go to **Order Management > Catalogs**): Now you will switch over to the Catalog Management subsystem and link specific catalog items to the appropriate Tax Categories. This can be done on the Pricing/Inventory page within each Variation/SKU Edit page.

Method 2: Configuring Taxes Using CSV Import

Using the CSV Tax Import functionality is a convenient way to quickly setup and update tax data in bulk. Creating a CSV tax file with a specified format (see "Example Scenarios" below) will allow you to complete steps 2 through 5 in one shot (above in Method 1). Step 6 of Method 1 can be done manually, but you can also use the CSV import functionality in the Catalog Management subsystem to associate catalogs to tax categories. Click here to see how CSV Catalog Import works.

Import your CSV tax file into your Commerce Manager by following the steps:

1. Select the Administration tab in the Commerce Manager.
2. In the navigation tree drill down to Taxes: **Order System > Taxes Configuration > Taxes**.
3. Click **Import Taxes** on the menu bar.
4. Choose **Add New File** and then **Browse** to select and upload your CSV tax file. The path of your chosen file will appear in the field.
5. Click **Upload File** and then **Save The File** icon. The CSV tax file will appear under the **Files Available for Import** section.
6. Select and highlight the CSV file and click the "Start Import" button.
7. Your import should begin and complete successfully in a pop-up dialog box.
8. You will now be able to view your tax setup in the Commerce Manager.

If you want to edit the existing setup, simply repeat steps 1 through 8 with your modified file.

Caution: Re-importing CSV files only edits existing information or adds new data, but nothing gets deleted. If you delete an entire row of data in the CSV file, you must manually delete those entries in the Commerce Manager. If in doubt, you can always delete all the tax data and perform the CSV tax import from scratch.

Sample CSV Files and Example Scenarios

Example 1: Single Tax Per Catalog Item Based on a Single Jurisdiction

For example, if your variable is State, then you can specify the tax rate on a state-level. So let's say CA is 9% and MA is 6%. If you placed an order from California, then 9% sales tax would be applied during checkout.

Jurisdiction	Jurisdiction Group	Tax Rate	Tax Category
California	CA Tax Group	9%	General Sales
Massachusetts	MA Tax Group	6%	General Sales

A sample tax CSV file called test.csv is available in this directory – [taxcsvsample1.zip].

Example 2: Two or More Taxes Per Catalog Item Based on More Than One Jurisdiction

For example, if you have a luxury item that requires State and Federal tax to be applied, then you can specify tax rates on a state and federal level. So let's say a luxury item purchased in CA has a 9% state tax rate and a federal tax rate of 3%. Both taxes would be applied during checkout.

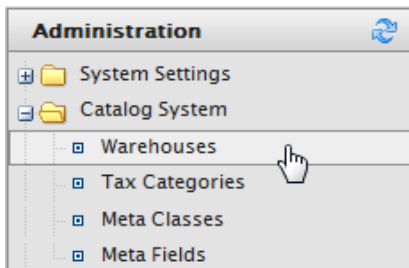
Jurisdiction	Jurisdiction Group	Tax Rate	Tax Category
California General	CA GS Tax Group	9%	General Sales
Massachusetts General	MA GS Tax Group	6%	General Sales
California Luxury	CA LX Tax Group	9%	Luxury Sales

Massachusetts Luxury	MA LX Tax Group	6%	Luxury Sales
US Federal Luxury	US LX Tax Group	3%	Luxury Sales

Warehouses

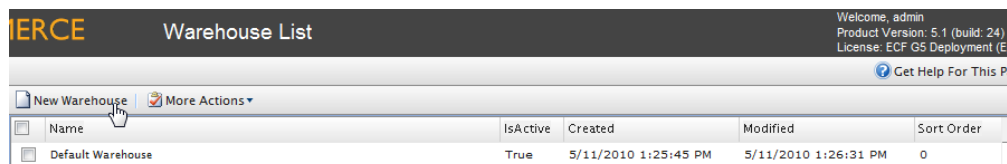
Commerce Manager users can add and track a list of **Warehouses** within EPiServer Commerce. A Warehouse is a physical place with an address from which items are shipped.

To access Warehouses, navigate to **Administration > Expand Catalog System > Warehouses**.



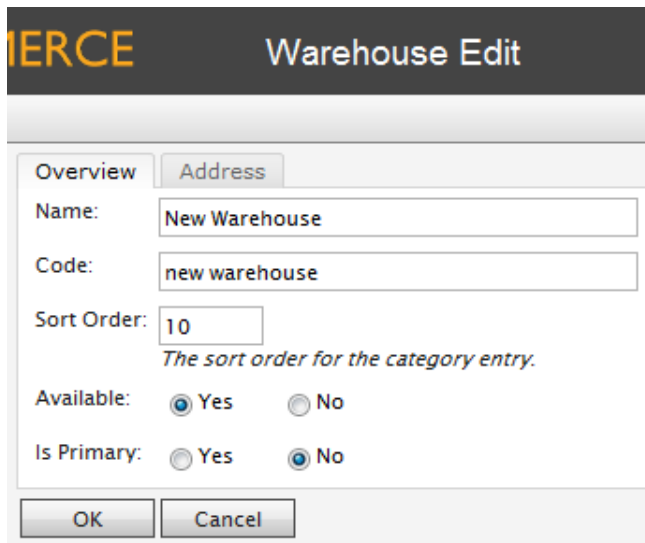
The important thing to keep in mind is that you can only associate a single warehouse for every SKU. So when you are creating a new SKU, you will have to specify the Warehouse where the item is being stored within the **Pricing/Inventory** tab.

The **Warehouse List** page appears. An example warehouse called "Default Warehouse" is on the list. To create a new Warehouse, click on **New Warehouse** on the menu bar.



The **Warehouse Edit** page has two tabs: **Overview** and **Address**.

1. Under the **Overview** tab enter in a **Name** and **Code**. The Name and Code name can have spaces in between characters.
2. Enter in a value for the **Sort Order** to determine the Warehouse's position on the **Warehouse List**.
3. Under **Available** select "Yes" or "No."
4. Under **Is Primary** select whether or not this Warehouse is the primary one. You can only have one primary Warehouse.



ERCE Warehouse Edit

Overview Address

Name:

Code:

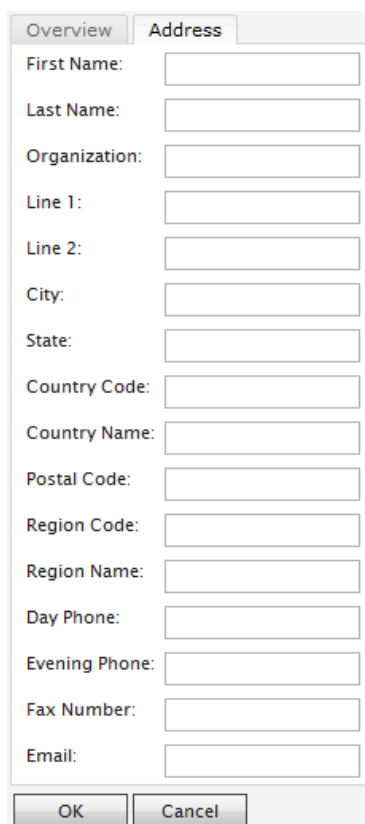
Sort Order:
The sort order for the category entry.

Available: ☒ Yes ☐ No

Is Primary: ☐ Yes ☒ No

OK Cancel

5. Under the **Address** tab, enter all relevant information regarding this Warehouse.



Overview Address

First Name:

Last Name:

Organization:

Line 1:

Line 2:

City:

State:

Country Code:

Country Name:

Postal Code:

Region Code:

Region Name:

Day Phone:

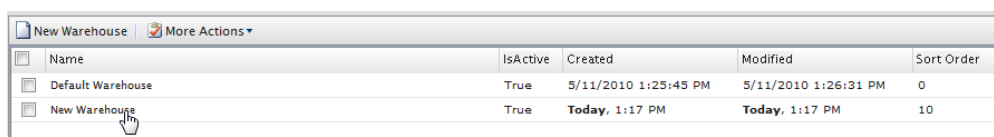
Evening Phone:

Fax Number:

Email:

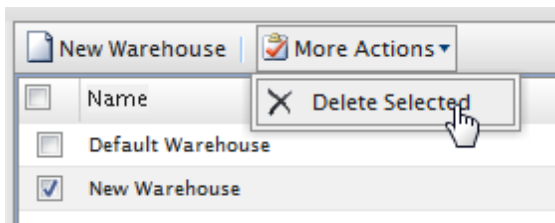
OK Cancel

6. Once you are satisfied with your entries, click on **OK** to save the Warehouse. Otherwise, click **Cancel** to go back to the **Warehouse List** page. The new Warehouse will appear on the list.



New Warehouse More Actions ▼					
<input type="checkbox"/>	Name	IsActive	Created	Modified	Sort Order
<input type="checkbox"/>	Default Warehouse	True	5/11/2010 1:25:45 PM	5/11/2010 1:26:31 PM	0
<input type="checkbox"/>	New Warehouse	True	Today, 1:17 PM	Today, 1:17 PM	10

To delete a Warehouse, place a check mark on the box next to the name of the Warehouse and then click on **More Actions** on the menu bar.



Confirm deletion by clicking **OK** on the pop-up window. Otherwise, click **Cancel** to go back.

Catalog Management

An EPiServer Commerce front-end public site allows customers to shop for products. To manage products, you can go to the back-end Commerce Manager and you will notice that products are arranged into one or more catalog(s). Catalogs are independent from one another and you may create as many catalogs as you need. Catalogs can be structured in a number of ways. For example, you may have various brands or product lines. Each brand or product line can have its own catalog. Or, a retailer may have multiple suppliers, in which case, you can segment each supplier into its own catalog.

A default B2C Sample Site along with a default electronics catalog (consisting of a Brands catalog + an Everything catalog) is included giving you a running demo site after you run the installer.

The EPiServer Commerce Catalog Management provides full complement of tools and capabilities to create and manage a diverse range of products, variations, pricing strategies, languages, and related web site functions.

EPiServer Commerce allows you to easily and flexibly organize and categorize your products. All products referenced on a public site reside in a catalog created in the back-end. Multiple catalogs can be created and assigned to one or more sites. The dates that each catalog will be available to the customer can also be defined. In this way, future revisions to items and pricing can be prepared easily and reviewed in advance of the release date to the site.

Catalogs can be organized into Categories, Products, SKUs, Bundles, Packages and Dynamic Packages.

Catalog and Catalog Entries

- **Catalogs** - a catalog is a top-level container for all catalog entries such as Categories, Products and SKUs.
- **Catalogs** - a Catalog is a top-level container for all Catalog Entries such as Categories, Products and SKUs
- **Categories** - a Category is a grouping of purchasable Products
- **Products** - a Product represents various forms of merchandise that you can display and purchase from the front-end site, including Products, Variations/SKUs, Bundles, Packages and Dynamic Packages
 - **Product Entries** - a Product Entry typically contains a Product name, part number, description and images
 - **Variations/SKUs** - a Variation or SKU corresponds to a specific type of Product with specific characteristics. For example, a shirt Product will have an individual Variation/SKU which includes size, color and sleeve length.
 - **Bundles** - a Bundle is a collection of Variations and SKUs allowing customers to purchase two or more items at once

- **Packages** - a Package is comparable to an individual SKU because the Package item must be purchased as a whole (i.e. computer system)
- **Dynamic Packages** - a Dynamic Package is similar to the Package definition above with the added ability to configure the Package during checkout

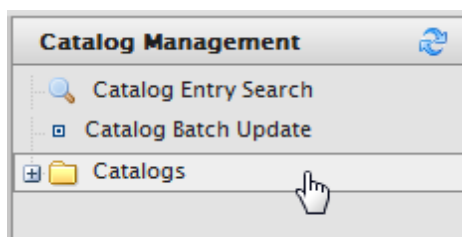
Working with Catalogs

A catalog is a top-level container for all catalog entries such as Categories, Products and SKUs. In this section, you will learn how to browse, create, and delete catalogs. We recommend that you start with the B2C Sample Site which came with your package -- it contains the Everything/Brands catalog. You can use the import functionality to get this into one of your environments, edit/master the content and export it so that this polished catalog can be used in a different environment. Also, you are given the flexibility to use a CSV file to rapidly create a new catalog from scratch.

Browsing Catalogs

All Catalogs are managed under the Catalog Management system.

To browse the Catalog, click on **Catalog Management** on the left menu. Click on **Catalogs** to browse the list of Catalogs.



The **Catalog List** page shows the following two sample nodes by default:

- **Brands** - this node contains information regarding different Brands.
- **Everything** - this node contains information on individual sales items grouped in different categories ("Digital Cameras," "Daily Specials," etc.)

Clicking on the **Memo** icon, located between the check box and the folder icon, will display more information and settings of the particular Catalog in the Catalog Edit page.

Clicking on the Catalog names ("Brands" and "Everything" highlighted in blue) will take you to the **Node List** page, which is the list of Sub-Categories under the selected Catalog.

IERCE

Catalog List



Welcome, admin
Product Version: 5.1 (bu
License: ECF GS Deploy

New Catalog

Import/Export

More Actions

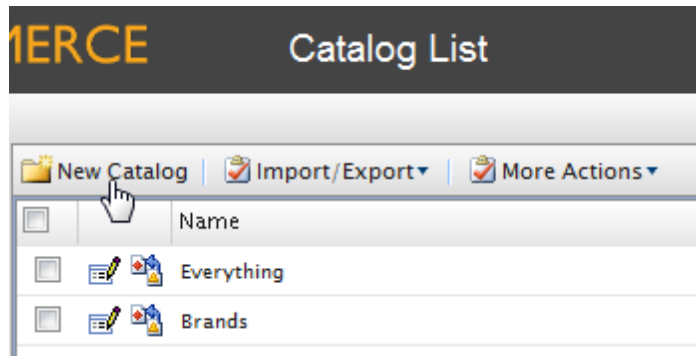
Get Help For

<input type="checkbox"/>	Name	Available from	Expires	Status
<input type="checkbox"/>	 Everything	12/18/2007 9:00:00 AM	12/18/2020 9:00:00 AM	True
<input type="checkbox"/>	 Brands	6/24/2008 7:00:00 PM	6/24/2020 7:00:00 PM	True

Creating a Catalog

The **Catalog List** page, used to organize and manage Catalogs, contains information regarding Brands and sales items. These sets of information will either be displayed on the front-end site, or used for other purposes such as for pricing and Promotions.

To create a new Catalog, click on **New Catalog**.



- **Category Name** - this name will appear in the Catalog List Page (e.g., Brands, Everything)
- **Catalog Owner** - designate an existing user as the Catalog owner
- **Available from** - select the date to which the Category is activated
- **Expires on** - select the expiration date; once the expiration date passes, the Product will no longer appear on the front-end site.
- **Default Currency** - this setting will set the Default Currency for the relevant Catalog contents
- **Default Language** - this will set the Default Language for the contents
- **Base Weight** - this assigns the weight units for the contents of the Catalog (e.g. pounds or kilograms). More units may be added.
- **Other Languages** - you can also select other available Languages other than your default Language
- **Sites** - this determines the site/sites that the relevant Products will be displayed in. At least one site must be highlighted, but you can highlight multiple sites to apply the catalog more than one site.
- **Sort Order** - the Sort Order determines the order to which the Catalog appears in the Catalog List page
- **Available** - select "Yes" to make the Catalog contents appear on the front end site; select "No" to hide the Catalog from the front-end site

Once done setting up your Catalog attributes, select **OK** to save the Catalog. You will be brought back to the **Catalog List** with the new Catalog. Select **Cancel** to cancel out of the **Catalog Edit** page and back to the Catalog List.

Commerce Manager Catalog Edit

Overview

Catalog Name:
catalog name description

Catalog owner:

Available from:

Expires on:

Default Currency:

Default Language:

Base Weight:

Other Languages:

Sites:

Sort Order:

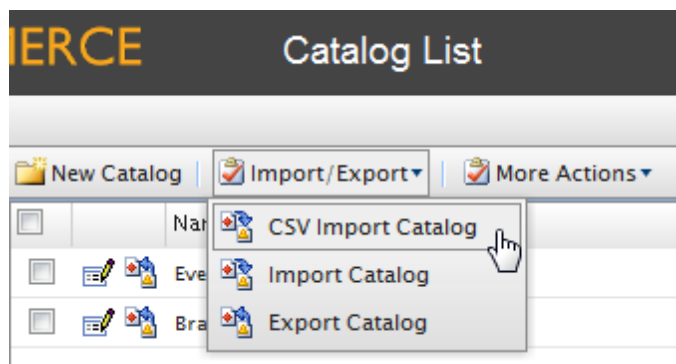
Available: ☒ Yes ☐ No

Importing and Exporting Catalogs

Preexisting catalog data can be imported or exported quickly to and from the Commerce Manager.

Accessing the Import & Export Functions

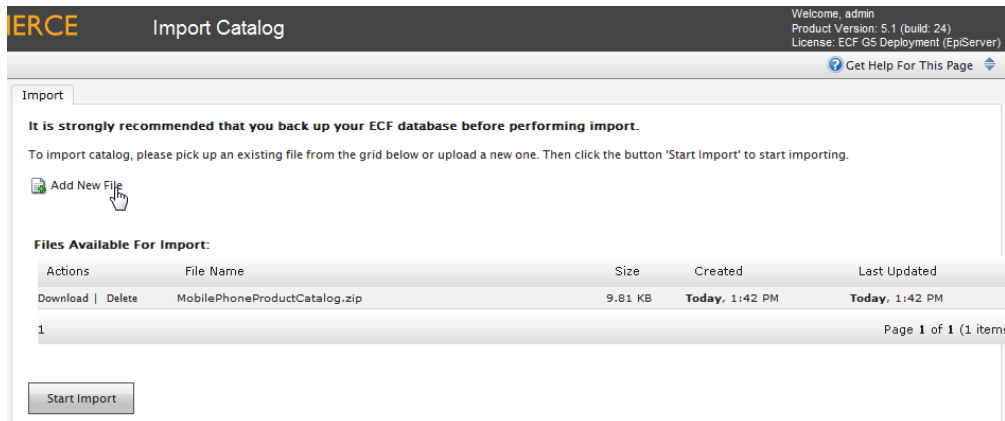
1. Access the **Catalog List** page in the Catalog Management subsystem. The Import/Export menu is located in the upper left corner of the main window.
2. For exporting catalogs, click on the check box for the appropriate catalog nodes.
3. Click on the **Import/Export** pull-down menu to choose either import or export. The corresponding page will appear in the main window.



Importing Catalogs

1. Browse and select the file to upload.
2. Click on the **Upload** file button. The files upload will appear in the list below.

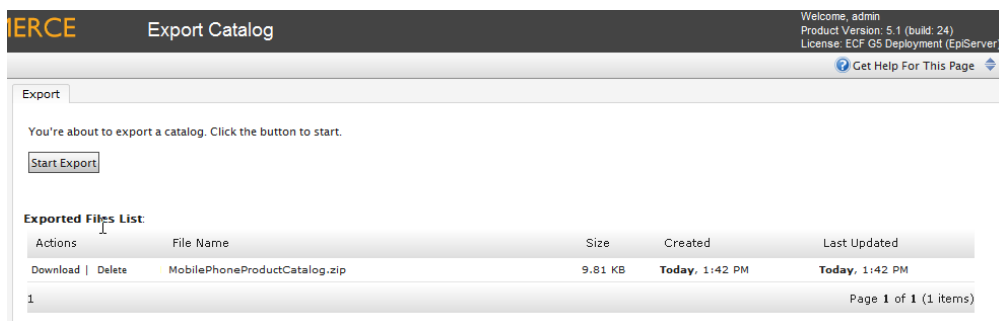
3. Click on the **Start Import** button. The progress window will show that the import is taking place.
4. When the import is 100% complete, close the progress window.



Exporting Catalogs

There are two way to export catalogs in the Export Catalogs page.

1. Export everything included in the catalog node that you've selected.
 - To do this, click on the **Start Export** button. The progress window appears and shows the status of the export.
 - When the export is 100% complete, click on **Close** to close the progress window
2. Export only the desired files.
 - To do this, click on the **Download** links highlighted in blue.



Using CSV Files to Quickly Create Custom Catalogs

Why Should I Use a CSV File?

The CSV catalog import is a feature in the Catalog Management system that enables you to import and manage catalog entries (such as Products, Variations/SKUs, Packages) in bulk using an excel spreadsheet (.csv format). It is an alternative to manually creating catalog entries directly in Commerce Manager, which can be tedious when dealing with a large amount of catalog data.

This feature enables you to accomplish these key tasks:

- Import your .csv spreadsheets and create new catalog entries in Commerce Manager.
- Set your catalog items into a desired category structure of your choosing
- Create entry relations to associate one entry with others (e.g., variation/SKUs will appear within a product or a package)
- Edit or delete existing catalog items.

The CSV catalog import feature can be used for your entire catalog data, or just portions of them.

Import Overview

Here are the basic steps you can take to import and set up a new catalog using the CSV import feature. Before you start, choose an existing catalog folder or create a new one (in the Catalog Management subsystem) to import the CSV files to.

1. Create CSV data files (using Excel Spreadsheet, Notepad, etc.) with information about your categories, entries, and entry relations.
2. Create necessary meta fields for the new catalog entries (in the Administration subsystem).
3. Upload the CSV data files to the **CSV Import** page.
4. Create a mapping file for each CSV file. A mapping file is needed to link each column of data in a CSV file to the correct attributes in Commerce Manager.
5. Import the CSV files and their corresponding mapping files into a specific catalog.
6. Create entry relations to associate one entry with another (e.g., a Package and a Product, a Product and a Variation/SKU, etc.).

Format for CSV Files

CSV files you create and import into Commerce Manager need to have a particular format.

- The first row should have headers that correspond to different attributes of the data you want to import (e.g., product name, price, description, image file location, etc.).
- There are a few attributes that are in your CSV file to correctly structure your catalog:
- **Code:** A unique code to identify each category or entry
- **Name:** A unique name for each row of data
- **Entry Type** (for entries only): Each row must contain one of the following five words in order for the Commerce Manager to correctly recognize its entry type --"Variation", "Product", "Package", "Bundle" or "Dynamic Package"
- **Parent & Child Entry Code** (for entry relations only): A CSV file containing these codes can specify relationships between entries (e.g., display different Variations within a Product). Although, the following attribute is useful in creating a hierarchy in your catalog:
- **Action:** A command to specify the action that will be taken during the import. Choose one of the three options: **Insert/Update/Delete or I/U/D**.

Note: Please make sure to specify an appropriate command for each line of the CSV files. Entering "Insert" when that data already exist, or "Update" when no data exist will give an error during import and those line of data will not get successfully imported.

- **Category Code** (by comma): By assigning a category code to an entry, you can specify the category that you want to place your entry in.
Also please note this rule:

- **SEO URL:** By design, this attribute that is present in both categories and entries must be unique for each item in your catalog. Importing files that contain more than one identical url will result in an error.

Mapping Types

Different mapping types are used to create the mapping files mentioned in step 4 above.

- **Category w/ Meta Data** – select this type to create a mapping file for your category files.
- **Entry w/ Meta Data** – select this type to create a mapping file for all the entry files (i.e., Packages, Products, Variation/SKUs, Bundles, and Dynamic Packages).
- **Entry Relation** – select this type to create a mapping file for your entry relation file that specifies the relationships between entries such as many SKUs to one Product, or SKUs and Products to a Package.
- **Entry Association** – select this type when creating a mapping file for entry associations (Advertising other items under titles such as "You may also be interested in...").
- **Variation w/ Inventory** – select this type to create a mapping file to import your Pricing/Inventory data located in your Variation/SKU Edit screen.
- **Sale Price** – Select this type to create a mapping file for Sale Price file, which specifies different currencies for each item.

By selecting these options, the Commerce Manager will display different sets of Fields and Attributes for you to manually assign to each data column of your CSV file. Figure 8 and 9 below shows the display of the mapping files with the Category w/ Meta and Entry Relations Data type respectively. The items under **Fields and Attributes** with superscripts 1 and/or 2 are headers that are required attributes that must exist in the CSV files you are importing (1 - required field for Insert, 2 – required field for Update).

Example: Importing and Setting up a New Catalog

The example below demonstrates how to use CSV import using the guidelines provided above.

Let's say you want to set up a "Baby Stuff" catalog with categories and entries as shown here in Figure 1.

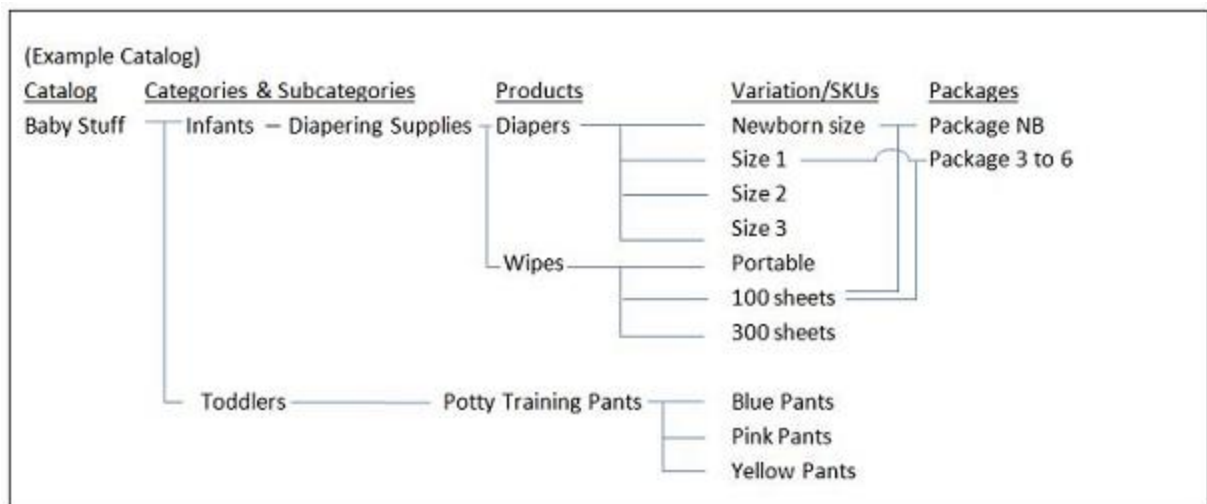


Figure 1

Prerequisite: Create a new catalog

First, create a new catalog called "Baby Stuff" in the Catalog Management subsystem.

Step 1: Create CSV files containing data for your new entries

As an example, let's say that you have the following data files in .csv format with content as described below:

- BabyStuffCategories.csv
- BabyProducts.csv
- BabyPackages.csv
- BabyVariations.csv
- BabyVariationInventoryPricing.csv
- BabyEntryRelations.csv
- BabyAssociations.csv
- BabySalePrice.csv

CSV File Type 1 - Category File

This file specifies data for categories and/or subcategories within a Catalog.

The top line has column headers that will be matched with the Meta fields in the later steps. The headers can also have different names. As you will see in later steps, Category Code in column I is important since it specifies where the entry data will be stored. The code entered in under Parent Code in column 2 can be used to create sub-categories. If the Parent Code is set to "null" or "root," then that category will be created in the root level of a catalog. In this example, the "Infants" and "Toddlers" category will be created at the root level, while the "Diapering Supplies" category will be located under "Infants" as a subcategory.

	A	B	C	D	E	F	G	H	I
1	Action	Category Code	Parent Code	Category Name	Available from	Expires on	Available (True/False)	Sort Order	
2	Insert	Cat1	null	Infants	1/1/2009	6/1/2009	TRUE	1	
3	Insert	Cat2	null	Toddlers	1/1/2009	6/1/2009	TRUE	2	
4	Insert	Cat10	Cat1	Diapering Supplies	1/1/2009	5/1/2009	TRUE	0	
5									

Figure 2

CSV File Type 2 – Entry Files

These files specifies data for Catalog Entries. The Products, Variation/SKUS, and Packages CSV files for this example are shown in Figure 3, 4, and 5 respectively.

	A	B	C	D	E	F	G	H	I	J
1	Action	Product Code	Product Name	Entry Type	Category Code	Available from	Expires on	Available (True/False)	Description	
2	Insert	Prod1	Diapers	Product	Cat10	1/1/2009	6/1/2009	TRUE	TestBrand Diapers	
3	Insert	Prod2	Wipes	Product	Cat10	1/1/2009	5/1/2009	TRUE	TestBrand Baby Wipes	
4	Insert	Prod3	Potty Training Pants	Product	Cat2	1/1/2009	6/1/2009	TRUE	TestBrand Potty Pants	

Figure 3

	A	B	C	D	E	F	G	H	I	J	K
1	Action	Variation Code	Variation Name	Entry Type	Category Code	Price	Available from	Expires on	Available (True/False)	Description	Primary Image
2	Insert	Var1	Diapers - Newborn size	Variation	Cat10	16.99	1/1/2009 6:00	10/1/2009 18:00	TRUE	Disposable newborn diapers - 100 count. For babies up to 10 pounds. Best Value!	E:\CCF_BabyCatalogs\CatalogImages\BabyDiaperNB.jpg
3	Insert	Var2	Diapers - size 1	Variation	Cat10	17.99	1/1/2009 6:00	10/1/2009 18:00	TRUE		
4	Insert	Var3	Diapers - size 2	Variation	Cat10	17.99	1/1/2009 6:00	10/1/2009 18:00	TRUE		
5	Insert	Var4	Diapers - size 3	Variation	Cat10	18.99	1/1/2009 6:00	10/1/2009 18:00	TRUE		
6	Insert	Var5	Diapers - size 4	Variation	Cat10	18.99	1/1/2009 6:00	10/1/2009 18:00	TRUE		
7	Insert	Var6	Training Pants - Blue	Variation	Cat2	25.99	1/2/2009 11:00	6/3/2009 23:00	TRUE		
8	Insert	Var7	Training Pants - Pink	Variation	Cat2	25.99	1/2/2009 11:00	6/2/2009 22:00	TRUE		
9	Insert	Var8	Training Pants - Yellow	Variation	Cat2	25.99	1/2/2009 11:00	6/1/2009 19:00	TRUE		
10	Insert	Var9	Baby Wipes - Portable 80 ct	Variation	Cat10	4.49	1/2/2009 11:00	6/2/2009 22:00	TRUE		
11	Insert	Var10	Baby Wipes - 300 ct	Variation	Cat10	15.99	1/2/2009 11:00	6/2/2009 22:00	TRUE		
12	Insert	Var11	Baby Wipes - 700 ct	Variation	Cat10	25.99	1/2/2009 11:00	6/2/2009 22:00	TRUE		
13											
14											

Figure 4

	A	B	C	D	E	F	G	H	I
1	Action	Package Code	Package Name	Entry Type	Category Code	Available from	Expires on	Available (True/False)	
2	Insert	Package NB	Newborn Package	Package	Cat10	1/1/2009	12/31/2010	TRUE	
3	Insert	Package3to6	3 to 6 mo Package	Package	Cat10	1/1/2009	12/31/2010	TRUE	
4									

Figure 5

CSV File Type 3 – Entry Relations File

This file is used to link one entry to others. In this example, Var1 ~ Var5 (different diaper sizes) are associated to Prod1 "Diapers," Var9 ~ Var11 (different quantity for wipes) are associated with Prod2 "Wipes" and so forth. Also some variations are assigned to packages. Please note that the Prod, Var and Package codes **MUST BE** the codes from the entry CSV files (Figure 3, 4, and 5). If you include codes that are not defined in the entry CSV files, you will get an error while importing them into Commerce Manager in Step 4.

	A	B	C	D
1	Action	Parent Entry Code	Child Entry Code	
2	Insert	Prod1	Var1	
3	Insert	Prod1	Var2	
4	Insert	Prod1	Var3	
5	Insert	Prod1	Var4	
6	Insert	Prod1	Var5	
7	Insert	Prod2	Var9	
8	Insert	Prod2	Var10	
9	Insert	Prod2	Var11	
10	Insert	Prod3	Var6	
11	Insert	Prod3	Var7	
12	Insert	Prod3	Var8	
13	Insert	Package NB	Var1	
14	Insert	Package NB	Var10	
15	Insert	Package3to6	Var2	
16	Insert	Package3to6	Var10	
17				

Figure 6

CSV file type 4 - Associations file

This file is used to create associations between different entries. In this example, Var 10 is associated to Var 1 as an Accessory, and Var 2 to Var 1 as a cross-sell item.

	A	B	C	D	E	F	G
1	Action	Baby Catalog Association Name	Parent Entry Code	Child Entry Code	Sort Order	Association Type	
2	Insert	Accessories	Var1	Var10	1	Optional	
3	Insert	Customers Who Bought This Item Also Bought	Var1	Var2	2	Optional	
4							

Figure 7

CSV file type 5 - Pricing/Inventory file

This file is used to specify the information for the Pricing/Inventory tab of each individual entry.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	
					Track Inventory									Reorder				Allow	Allow	Inventory		
1	Action	Entry Code	Price	Tax Category	(True/False)	Warehouse	Weight	Package	Min Quantity	Max Quantity	In Stock	Reserved	Min. Qty	Preorder Qty	Backorder Qty	Backorder	Preorder	Status	Preorder Avail	Backorder Avail		
2	Update	Var1	16.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
3	Update	Var2	17.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
4	Update	Var3	17.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
5	Update	Var4	18.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
6	Update	Var5	18.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
7	Update	Var6	25.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
8	Update	Var7	25.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
9	Update	Var8	25.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
10	Update	Var9	4.49	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
11	Update	Var10	15.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
12	Update	Var11	25.99	General Sales	TRUE	Default Warehouse	1	box	1	50	10	2	3	0	0	TRUE	TRUE	1	1/1/2009 9:00	1/3/2009 18:00		
13																						

Figure 8

CSV file type 6 - Sale Price file

This file is used to specify the information for the Pricing section of the Pricing/Inventory page.

	A	B	C	D	E	F	G	H	I
1	Action	Entry Code	Sale Type	Sale Code	Unit Price	Currency	Start Date	End Date	
2	Insert	Var1		BBV1	16.99	USD	1/1/2009 6:00	10/1/2009 18:00	
3	Insert	Var2		BBV2	17.99	USD	1/1/2009 6:00	10/1/2009 18:00	
4	Insert	Var3		BBV3	17.99	USD	1/1/2009 6:00	10/1/2009 18:00	
5	Insert	Var4		BBV4	18.99	USD	1/1/2009 6:00	10/1/2009 18:00	
6	Insert	Var5		BBV5	18.99	USD	1/1/2009 6:00	10/1/2009 18:00	
7	Insert	Var6		BBV6	25.99	USD	1/2/2009 11:00	6/3/2009 23:00	
8	Insert	Var7		BBV7	25.99	USD	1/2/2009 11:00	6/2/2009 22:00	
9	Insert	Var8		BBV8	25.99	USD	1/2/2009 11:00	6/1/2009 19:00	
10	Insert	Var9		BBV9	4.49	USD	1/2/2009 11:00	6/2/2009 22:00	
11	Insert	Var10		BBV10	15.99	USD	1/2/2009 11:00	6/2/2009 22:00	
12	Insert	Var11		BBV11	25.99	USD	1/2/2009 11:00	6/2/2009 22:00	
13									

Figure 9

Step 2: Create necessary meta fields for the new catalog entries

For this example, no additional meta fields need to be created because the sample spreadsheet uses only the default attributes.

To create new meta fields follow these steps here.

- Go to the Administration subsystem in Commerce Manager.
- Select the "Catalog System" folder and then "Meta Classes" node located in the left navigation frame.
- Select Create New, then New Meta Class from its pull-down menu.
 - Enter in a Name, Friendly Name (e.g., Baby Catalog), and some description (optional) for the meta class, and choose "Catalog Entry" for Entry Type.
 - Click OK to save the new class.
- Next Select Create New, then New Meta Field from its pull-down menu.
 - Enter in a Name, Friendly Name (e.g., Baby Diaper Size), and some optional description.
 - Also Choose the data type for this meta field and other properties by clicking on the check-boxes.
 - Click OK to save the new field.
 - Repeat the steps to create all the necessary fields.
- Associate the new meta fields to the meta class you created.

- Select to "Meta Classes" node on the left navigation frame again.
 - For "Element" choose "Catalog Entry" in the pull-down menu.
 - Under "Type" choose your meta class (e.g., Baby Catalog) you created earlier.
 - Select the desired meta fields from the list displayed at the bottom of the screen.
 - Select OK to save the new meta class to fields association.
- You are done with setting up your meta fields.

Step 3: Upload the CSV data files to the CSV Import page

Follow these steps to prepare the CSV files for import:

- Select the Catalog Management subsystem.
- In the upper-left detail area, click on Catalogs folder and you will see the Catalog List view in the main area.
- In the action area above the main view, click the Import/Export drop-down button and select CSV Import Catalog.
- You will now see the CSV Import Catalog page in the main screen. The screen contains two tabs 1) CSV Import and 2) Mapping File, which we will be talking about next.

CSV Import Tab

- In the "CSV Import" tab in the main view, click "Add New File."
- Browse for the CSV file you wish to import, then click "Upload File."
- When you get the "Uploaded File:" confirmation, click "Save the file."
- The CSV file you uploaded will be added to the "Files available for import:" list.
- Repeat the previous four steps for each CSV file you wish to upload.

CSV Import Mapping file

It is strongly recommended that you back up your ECF database before performing import.

To import catalog, please pick up an existing file from the grid below or upload a new one. Then click the button 'Start Import' to start importing.

[Add New File](#)

Files Available For Import:

Actions	File Name	Size	Created	Last Updated
Download Delete	BabySalePrice.csv	151 bytes	Today, 4:35 PM	Today, 4:34 PM
Download Delete	BabyAssociations.csv	215 bytes	Today, 4:33 PM	Today, 4:33 PM
Download Delete	BabyEntryRelations.csv	354 bytes	Today, 4:33 PM	Today, 4:33 PM
Download Delete	BabyVariationInventoryPricing.csv	1.52 KB	Today, 4:23 PM	Today, 4:23 PM
Download Delete	BabyVariations.csv	1.20 KB	Today, 4:23 PM	Today, 4:21 PM
Download Delete	BabyPackages.csv	259 bytes	Today, 4:21 PM	Today, 4:21 PM
Download Delete	BabyProducts.csv	369 bytes	Today, 4:21 PM	Today, 4:21 PM
Download Delete	BabyStuffCategories.csv	274 bytes	Today, 4:21 PM	Today, 4:21 PM

1 Page 1 of 1 (8 items)

Choose mapping file.

Actions	File Name	Size	Created	Last Updated
---------	-----------	------	---------	--------------

Page 1 of 0 (0 items)

Choose catalog for import.

Catalog: Brands

[Start Import](#)

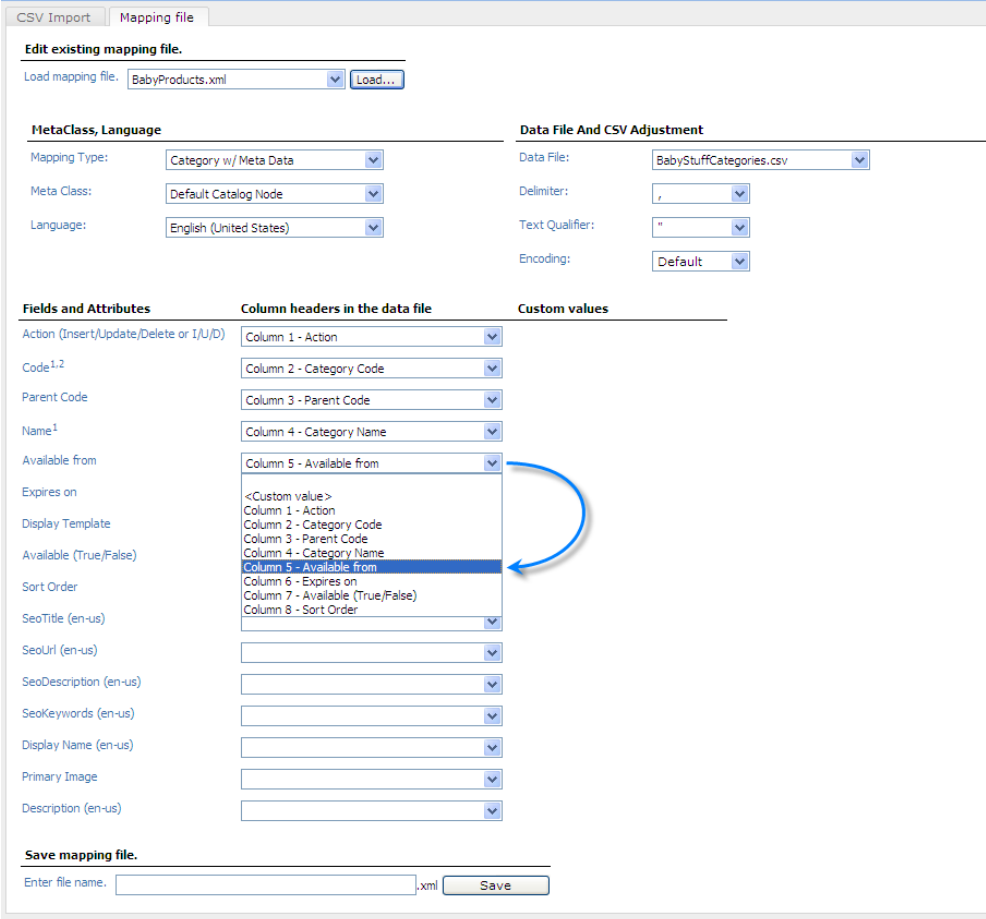
Figure 10

Step 4: Create a mapping file for each CSV file

Now create a mapping file that will specify the data in the CSV file to its corresponding attributes in the Commerce Manager.

Mapping file tab

- Click the "Mapping file" tab in the main view. You will now see the "Mapping file" tab view of the CSV Import Catalog view as shown in Figure 11.



CSV Import | **Mapping file**

Edit existing mapping file.

Load mapping file:

MetaClass, Language

Mapping Type:

Meta Class:

Language:

Data File And CSV Adjustment

Data File:

Delimiter:

Text Qualifier:

Encoding:

Fields and Attributes

	Column headers in the data file	Custom values
Action (Insert/Update/Delete or I/U/D)	<input type="text" value="Column 1 - Action"/>	
Code ^{1,2}	<input type="text" value="Column 2 - Category Code"/>	
Parent Code	<input type="text" value="Column 3 - Parent Code"/>	
Name ¹	<input type="text" value="Column 4 - Category Name"/>	
Available from	<input type="text" value="Column 5 - Available from"/>	
Expires on	<input type="text" value="Column 6 - Expires on"/>	
Display Template	<input type="text" value="Column 7 - Available (True/False)"/>	
Available (True/False)	<input type="text" value="Column 8 - Sort Order"/>	
Sort Order		
SeoTitle (en-us)		
SeoUrl (en-us)		
SeoDescription (en-us)		
SeoKeywords (en-us)		
Display Name (en-us)		
Primary Image		
Description (en-us)		

Save mapping file.

Enter file name: .xml

Figure 11

Edit existing mapping file section

- Load mapping file:** This section is used to retrieve previously created and saved mapping files. Since there is no existing mapping file in this example, leave this section blank.

Meta Class, Language section

- Mapping Type*: Select "Category w/ Meta Data"
- Meta Class*: Select "Default Catalog Node"
- Language*: English

Data file and CSV adjustment section

- Data File*: The drop down values presented here are dependent on the different CSV data files you uploaded on the "CSV Import" tab in step 2.
- For this example, first choose "BabyStuffCategory.csv." Leave the rest of the field as default and move on to the next section.

Fields and Attributes, Column headers in the data file, and Selected values section

The values presented under the "Fields and Attributes" column are representative of the "Meta Class" selected in the "MetaClass, Language" section above (which were either previously imported or created within Commerce Manager).

The values presented in the drop-down menus under the "Column headers in the data file" column are representative of the "Data file" selected in the "Data file and CSV adjustment" section above (which were previously imported above).

- Select the appropriate "Column header" drop-down value to "map" with the MetaClass "Fields and Attributes" to the left; the value selected will be reflected in the "Selected values" column to the right.

Save mapping file section

- Enter a file name for the "Enter file name" textbox. For this example, save the mapping files using the same CSV file names.
- Click the "Save" button. The browser returns to the CSV Import tab, and the mapping file in .XML format will be added to the list in the "Choose mapping file" section.
- Repeat Step 3 to create and save a mapping file for each CSV files you wish to import.
- For CSV Entry files, select the "Entry w/ Meta Data" option under "Mapping Type."
- For CSV Entry Relations file, select "Entry Relation".
- For CSV Associations file, select "Entry Association."
- For CSV Pricing/Inventory file, select "Variation w/ Inventory."
- For CSV Sale Pricing file, select "Sale Price."
- When all the mapping files are saved, your CSV Import tab screen should look something like this.

CSV Import Mapping file

It is strongly recommended that you back up your ECF database before performing import.

To import catalog, please pick up an existing file from the grid below or upload a new one. Then click the button 'Start Import' to start importing.

[Add New File](#)

Files Available For Import:

Actions	File Name	Size	Created	Last Updated
Download Delete	BabySalePrice.csv	138 bytes	Yesterday, 4:35 PM	Yesterday, 5:14 PM
Download Delete	BabyAssociations.csv	215 bytes	Yesterday, 4:33 PM	Yesterday, 4:33 PM
Download Delete	BabyEntryRelations.csv	354 bytes	Yesterday, 4:33 PM	Yesterday, 4:33 PM
Download Delete	BabyVariationInventoryPricing.csv	1.54 KB	Yesterday, 4:23 PM	Yesterday, 4:49 PM
Download Delete	BabyVariations.csv	1.20 KB	Yesterday, 4:23 PM	Yesterday, 4:21 PM
Download Delete	BabyPackages.csv	259 bytes	Yesterday, 4:21 PM	Yesterday, 4:21 PM
Download Delete	BabyProducts.csv	369 bytes	Yesterday, 4:21 PM	Yesterday, 4:21 PM
Download Delete	BabyStuffCategories.csv	274 bytes	Yesterday, 4:21 PM	Yesterday, 4:21 PM

Page 1 of 1 (8 items)

Choose mapping file.

Actions	File Name	Size	Created	Last Updated
Download Delete	BabySalePrice.xml	2.82 KB	Yesterday, 4:43 PM	Yesterday, 4:56 PM
Download Delete	BabyAssociations.xml	2.09 KB	Yesterday, 4:42 PM	Yesterday, 4:42 PM
Download Delete	BabyEntryRelations.xml	1.97 KB	Yesterday, 4:42 PM	Yesterday, 4:42 PM
Download Delete	BabyVariationInventoryPricing.xml	6.22 KB	Yesterday, 4:41 PM	Yesterday, 4:50 PM
Download Delete	BabyVariations.xml	4.12 KB	Yesterday, 4:40 PM	Yesterday, 4:40 PM
Download Delete	BabyPackages.xml	4.11 KB	Yesterday, 4:38 PM	Yesterday, 4:38 PM
Download Delete	BabyProducts.xml	4.14 KB	Yesterday, 4:38 PM	Yesterday, 4:38 PM
Download Delete	BabyStuffCategory.xml	4.63 KB	Yesterday, 4:37 PM	Yesterday, 4:37 PM

Page 1 of 1 (8 items)

Choose catalog for import.

Catalog: BabyStuff

[Start Import](#)

Figure 12

Step 5. Import the CSV files and their corresponding mapping files into a specific catalog

At the "CSV Import" tab view (Figure 12), do the following:

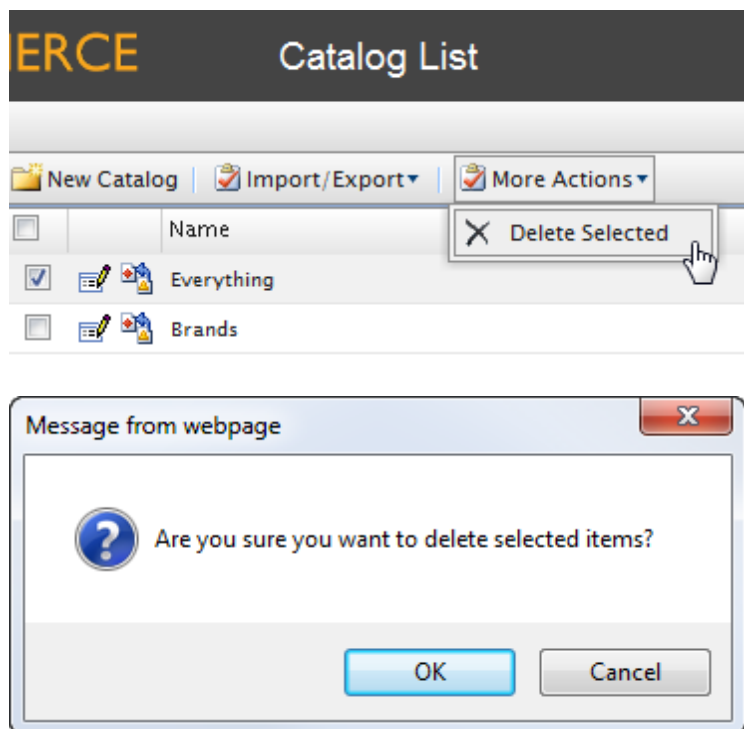
- Select and highlight the CSV file you wish to import in the "Files available for import" section. For this example, select BabyStuffCategories.csv.
- Select and highlight the mapping file that corresponds to the selected CSV file in the "Choose mapping file for import" section. For this example, select BabyStuffCategories.xml.
- Select the catalog in the "Catalog" drop-down into which you would like to import your CSV data. In this example choose "Baby Stuff".
- Click the "Start import" button. You will see the "Importing catalog" modal dialog box which will notify you of the percentage of completion as well as logging messages.
- Click "Close Window" at the bottom of the modal dialog to complete the operation.
- Repeat Step 4 to import all the remaining CSV & Mapping pairs.

Step 6. Verify Your Import

In the Catalog Management subsystem, expand the "Baby Stuff" folder under Catalog and verify that the contents of your CSV file were imported into the appropriate catalog.

Deleting a Catalog

1. At the **Catalog** List page, check off the box to the respective Catalog you wish delete.
2. Select **More Actions** and then **Delete Selected** from its pull-down menu, located in the menu bar.
3. A pop up will appear to confirm your action. Select **OK** to delete it. The chosen catalog will be deleted from the list.



Categories and Nodes

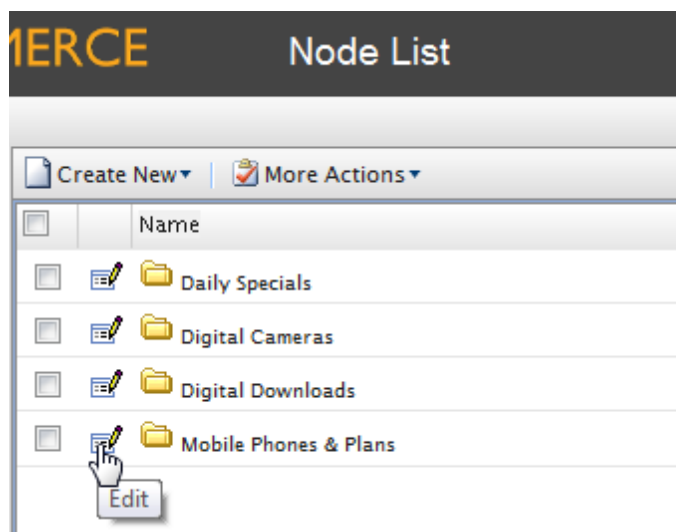
A Category or a Node is a grouping of purchasable Products. In this section, you will learn how to browse, create, clone, move, link, and delete Categories and Sub-Categories.

Browsing Categories

The Node List (aka the Category List) is used to organize and manage nodes/categories, subcategories created within a Catalog.

The "Brand" Catalog for example, which is available in the Commerce Manager by default, includes nodes assigned with brand names such as "Canon", "IZOD", and "Dell". Also the Everything Catalog contains a node called "Mobile Phones & Plans" which has subcategories called "Phones" and "Plans". Additional nodes or subcategories may be created in the Node List page.

1. Clicking on the memo icon, located between the check box and the folder icon, will display the Catalog Node Edit page, which contains more information and settings of that particular node. Here you can setup the information and status that are common for all it's subcategories.
2. Clicking on any node names (highlighted in blue) will take you to the next sublevel, which shows the list of categories under the selected node.



Menu Bar Functions

- **Create New**

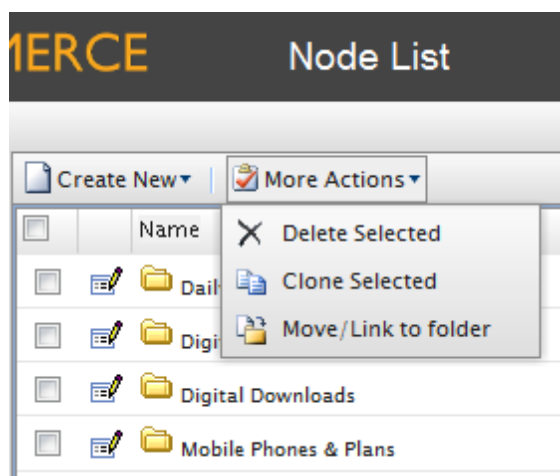
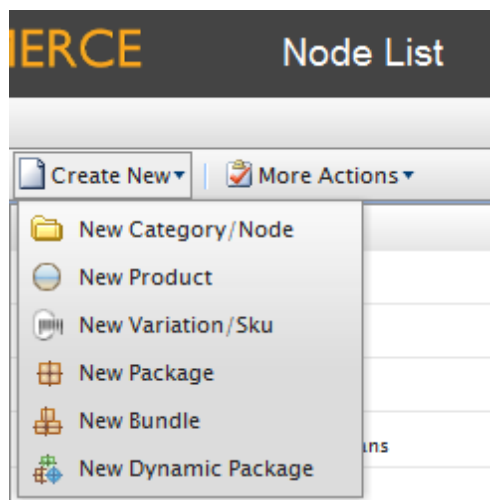
This dropdown allows users to create different types of Categories/Nodes or Product entries as shown below.

- Category/Node
- Product
- Variation/SKU
- Package
- Bundle
- Dynamic Package

- **More Actions**

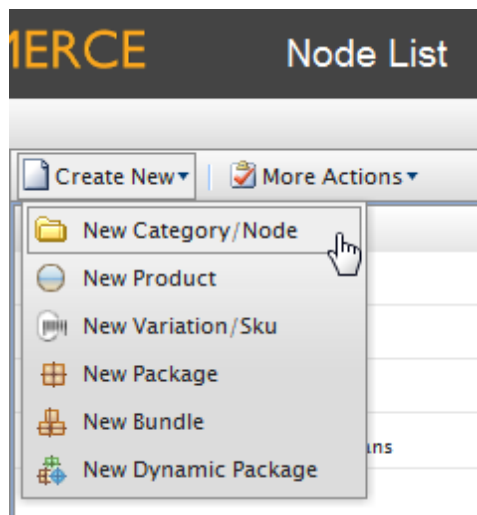
- Delete Selected
- Clone Selected
- Move/Link to Folder

Under "More Actions," cloning creates a duplicate with a unique ID that you can place in any location/hierarchy that you choose. "Move/Link to Folder" allows you either to move a category/product to a new location/hierarchy or to link one category/product to another category/product. So for example, you can create a category called "Featured Products" and link it to items across various other categories. This way, if you make changes to content on the original product page and that same product is part of the "Featured Products" category as a linked product, the changes will be displayed in both locations. In other words, changes are bi-directional. Links can be broken if either of the two are deleted.



Creating a Category

- I. To create a new category, click on **Create New** and then click on **New Category/Node**.



This page will appear when creating a new category or editing an existing one. The **Catalog Node Edit** page will contain information of a **Node** selected from the **Node List** page.

EPiSERVER Commerce Catalog Node Edit

Welcome, admin
Product Version: 5.1 (build: 24)
License: ECF G5 Deployment

Get Help For This

Overview | SEO | Assets

Name:

Available from:

Expires on:

Display Template:

Code:

Sort Order:

Available: ☐ Yes ☒ No

Meta Class:

Display Name (en-us):

Display Name (de-de):

Display Name (es-es):

Primary Image (en-us):

Primary Image

Description (en-us):

Css Class Paragraph Default Font Size

B I U

Overview Fields

- **Name** - enter a name for the product
- **Available from** - the date to which the product is activated

- **Expires on** - the date on which the product expires; once the expiration date passes, the product will no longer appear on the public site
- **Display Template** - choose a display template used to show the products in the public site from this drop-down box; by default, the only available catalog display template is "Digital Camera". To create your custom template, you will need some technical skills with html templates.
- **Code** - enter a product code here (e.g. DIGICAM)
- **Sort Order** - determines the order to which the product is sorted in the Node List page
- **Available** - select Yes to make the product appear on the public site; select No to hide the product from the public site
- **Meta Class** - the choice made here dictates which the meta-fields or product attributes will appear on the public site or Commerce Manager site
- **Display Name** - enter a name the way you like to be displayed in the public site with appropriate languages
- **Primary Image** - use the browse button to select and upload an image here
- **Description** - enter a description of a product with appropriate languages

Once done, click **OK** on the bottom of the page.

SEO

Search Engine Optimization can be achieved by entering the following information for the product.

- **Title** - this is the friendly name that appears in your browser's title area
- **URL** - this is what gets displayed in the browser URL window
- **Description** - this is the meta description that is used for SEO purposes by search engines
- **Keywords** - keywords used for SEO purposes by search engines

The screenshot shows the 'Catalog Node Edit' form with the 'Overview' tab selected. The form contains input fields for Title, Url, Description, and Keywords for three languages: en-us, de-de, and es-es. Each language section has a text area for Description and Keywords with up/down arrow icons on the right. At the bottom are 'OK' and 'Cancel' buttons.

Assets

Under Assets, you can associate additional files such as images, pdf, and video files all stored in the Asset Management subsystem.

The screenshot shows the 'Catalog Node Edit' form with the 'Assets' tab selected. It features a 'Find Assets' search bar with a dropdown arrow and an 'Add Asset' button. Below is a 'Group Name' dropdown menu set to 'default'. A table with columns 'Edit Command', 'ID', 'Type', 'Name', 'Group', and 'Sort Order' is shown, currently empty. The page status 'Page 1 of 0 (0 items)' is displayed. 'OK' and 'Cancel' buttons are at the bottom.

Follow these three simple steps to add an asset file to the current entry.

1. Click on the **Find Assets** pull-down menu to display all files available in the Asset system.
2. Choose one file at a time and type in an appropriate **Group Name** (see table below), depending now how you would like it to be displayed.
3. Click on **Add Asset**. The asset associated to this entry will appear in the lower section of the screen.
 - You can edit the Group Name or sort order by clicking on the Edit icon to the left of an existing asset. After making any changes, make sure to click **Update** (Clicking **OK** at the bottom of the screen during the editing mode will not save the changes made).
 - You can delete any existing asset by clicking on the "X" icon.

File type	Group Names	How it gets displayed in the public site
Image Files (jpg, png, etc.)	image	Thumbnail icon will appear on the product details page
Downloadable Files (docs, pdf, mp3s)	Downloads	A "Downloads" tab will appear towards the bottom of the details page
Specification Files (docs, pdf)	Specifications	A "Specifications" tab will appear towards the bottom of the details page

ERCE Catalog Node Edit

Overview | SEO | **Assets**

Find Assets: **Add Asset**

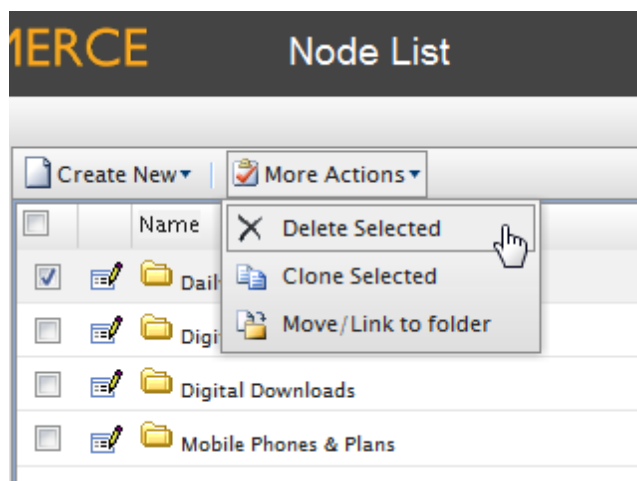
Group Name:

Edit Command	ID	Type	Name	Group	Sort Order
	2	folder	Root/Video/	default	0

1 Page 1 of 1 (1 items)

Deleting a Category

1. To delete a category/node, go to the Node List.
2. Checkmark the box next to the node.
3. Click on **More Actions** and then click on **Delete Selected** to delete the Category/Node.



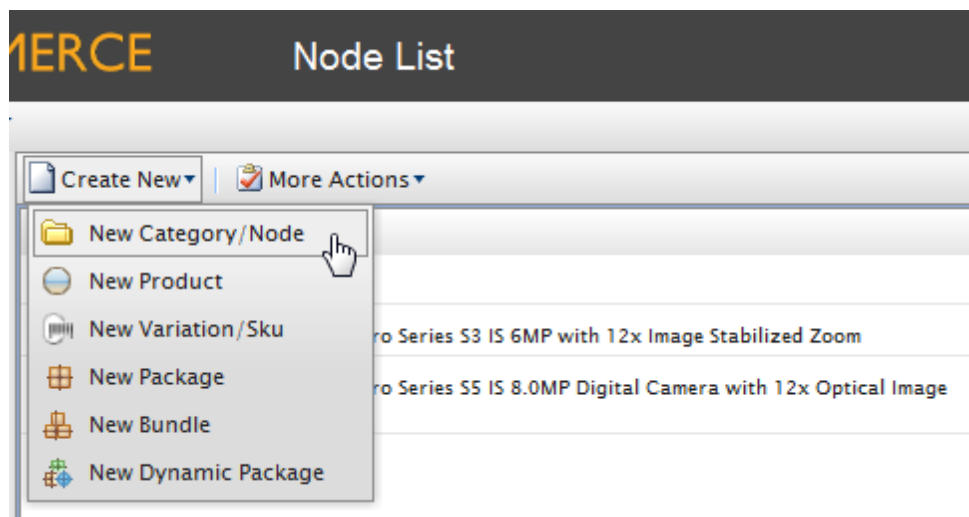
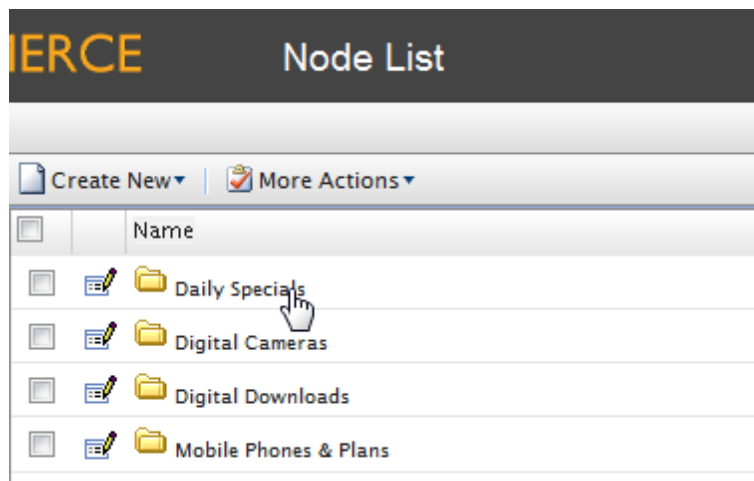
Organizing Categories

To organize a category, enter a numerical order in the **Sort Order** field within the **Catalog Node Edit** page. Categories and node will sort based on numerical order.

Creating a Sub-Category

To create a sub-category, it is similar to creating a high-level category.

1. Go to **Node List** and click through an existing Catalog
2. Click on **Create New** and click on **Category Node**. Specify the information under **Catalog Edit** (refer to Creating a Category) and click **OK** to save changes.



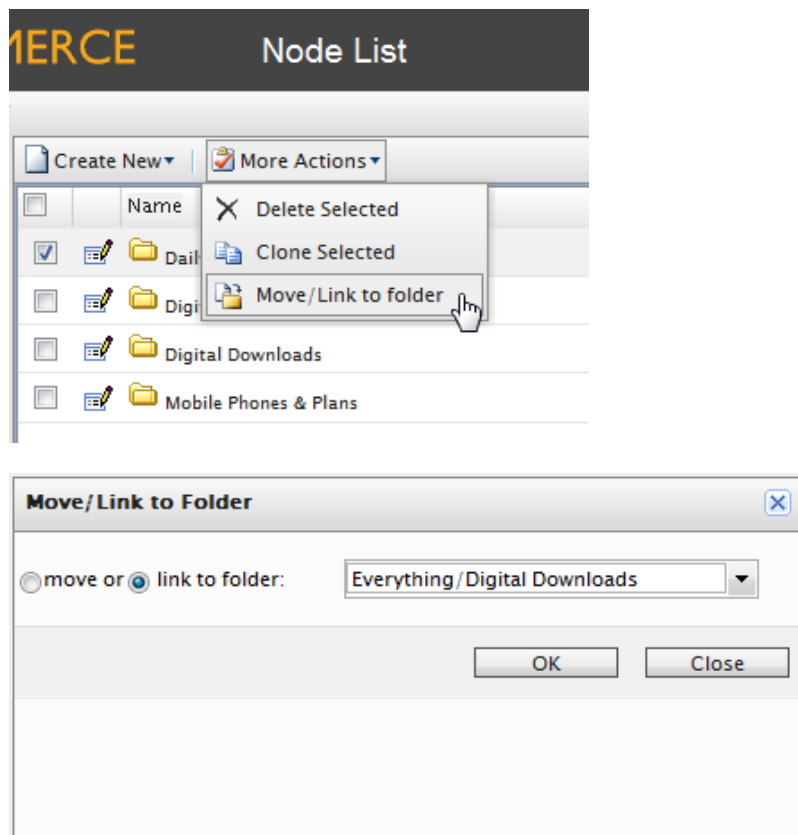
Cloning, Moving or Linking a Category

Under "More Actions," cloning creates a duplicate with a unique ID that you can place in any location/hierarchy that you choose.

"Move/Link to Folder" allows you either to move a category/product to a new location/hierarchy or to link one category/product to another category/product. So for example, you can create a category called "Featured Products" and link it to items across various other categories.

This way, if you make changes to content on the original product page and that same product is part of the "Featured Products" category as a linked product, the changes will be displayed in both locations. In other words, changes are bi-directional. Links can be broken if either of the two are deleted.

1. To link a category, go to the **Node List** and checkmark a category you want linked back.
2. Click on **More Actions** and then click **Move/Link** folder.
3. Select link to folder and select the link destination from the dropdown menu. Click **OK** to create the link to that category under that directory.



Products, Variations and SKUs, Bundles, Packages, Dynamic Packages and Associations

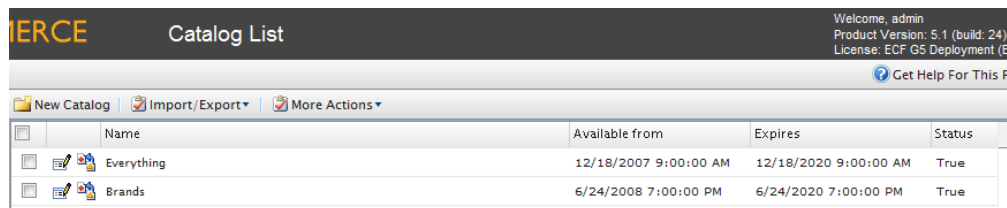
A product represents various forms of merchandise that you can display and purchase from the public site, including Products, Variations/SKUs, Bundles, Packages and Dynamic Packages.

- **Product Entries**
A product entry typically contains a product name, part number, description and images.
- **Variations/SKUs**
A variation or SKU corresponds to a specific type of product with specific characteristics. For example, a product of Shirts will have an individual variation/SKU which includes size, color and sleeve length.
- **Bundles**
A bundle is a collection of variations and SKUs allowing customers to purchase two or more items at once.
- **Packages**
A package is comparable to an individual SKU because the package item must be purchased as a whole (i.e. computer system).
- **Dynamic Packages**
A dynamic package is similar to the package definition above with the added ability to configure the package during checkout.
- **Associations**
One or more products can be associated to a product so that they can be displayed advertised on the public site as product accessories, or upselling/cross-selling item. Associations can be made from any of the individual products (Product Entries, SKUs, Bundles, Packages, and Dynamic Packages).

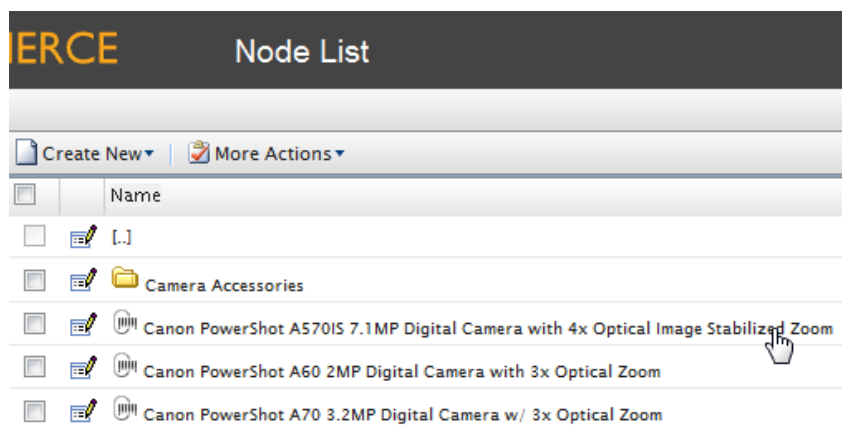
Browsing Products

Products are created within a catalog. Products can be placed one level beneath the root of a Catalog and further down into subfolders.

To browse products, click on a **Catalog** and drill down categories until you see Products such as the one highlighted below in the second screenshot.



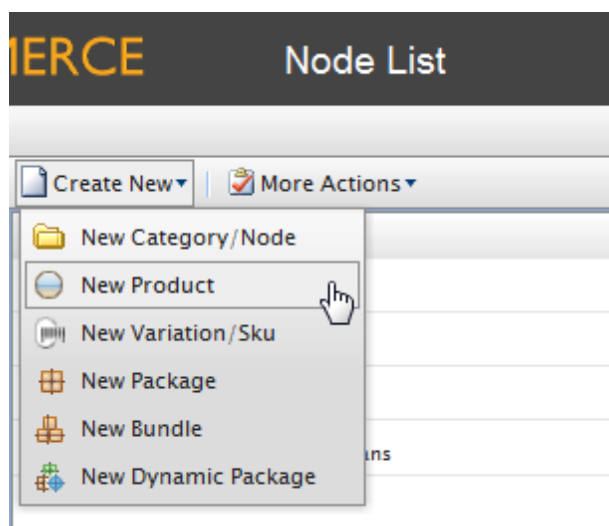
	Name	Available from	Expires	Status
	Everything	12/18/2007 9:00:00 AM	12/18/2020 9:00:00 AM	True
	Brands	6/24/2008 7:00:00 PM	6/24/2020 7:00:00 PM	True



	Name	Available from	Expires	Status
	[...]			
	Camera Accessories			
	Canon PowerShot A570IS 7.1MP Digital Camera with 4x Optical Image Stabilized Zoom			
	Canon PowerShot A60 2MP Digital Camera with 3x Optical Zoom			
	Canon PowerShot A70 3.2MP Digital Camera w/ 3x Optical Zoom			

Creating a Product (including Variations and SKUs, SEO, Associations, Assets)

To create a product, click through an existing catalog and click on **Create New** and then click on **Create Product**.



Overview Tab

This is where you enter basic information about the Product.

- **Name** - a name for the product.
- **Available from** - the date to which the product is activated
- **Expires on** - the date on which the product expires; once the expiration date passes, the product will no longer appear on the public site
- **Display Template** - choose a display template used to show the products in the public site from this drop-down box; by default, the only available catalog display template is "Digital Camera". To create your custom template, you will need some technical skills with html templates.
- **Code** - enter a product code here (e.g. DIGICAM).
- **Sort Order** - determines the order to which the product is sorted in the Node List page.
- **Available** - select Yes to make the product appear on the public site; select No to hide the product from the public site
- **Meta Class** - the choice made here dictates which the meta-fields or product attributes will appear on the public site or Commerce Manager site.

EPiSERVER Commerce Product Edit

Overview Variations/SKUs SEO Associations Assets

Name:

Available from:

Expires on:

Display Template:

Code:












































Sort Order:
The sort order for the category entry.

Available: ☐ Yes ☒ No

Meta Class:

OK Cancel

Depending on the meta class selected, more fields are available to enter data. For instance, selecting the **Digital Camera** meta class will yield digital camera meta fields and attributes.

Overview	Variations/SKUs	SEO	Associations	Assets
Name: <input type="text"/>				
Available from: <input type="text" value="5/27/2010"/>  <input type="text" value="08:41 AM"/>				
Expires on: <input type="text" value="5/27/2011"/>  <input type="text" value="08:41 AM"/>				
Display Template: <input type="text" value="Digital Camera"/>				
Code: <input type="text"/>				
Sort Order: <input type="text" value="0"/> <p><i>The sort order for the category entry.</i></p>				
Available: <input type="radio"/> Yes <input checked="" type="radio"/> No				
Meta Class: <input type="text" value="Digital Cameras"/>				
Display Name (en-us): <input type="text"/>				
Display Name (de-de): <input type="text"/>				
Display Name (es-es): <input type="text"/>				
Primary Image (en-us): <input type="text"/> <input type="button" value="Browse..."/>				
Description (en-us): <div> <div> <div>Css Class</div> <div>Paragraph</div> <div>Default Font</div> <div>Size</div> </div> <div>       </div> <div>          </div> <div>                           </div> </div>				

Variations/SKU Tab

Variations/SKUs are subcategories of a Product, which represents different "variations" of the particular product (colors, sizes, different editions for example). Such Variations/SKUs can be grouped a chosen product from this tabbed page. Follow these steps to group variations/SKUs.

1. Select the **Variations/SKUs** tab
2. Within the drop-down menu next to **Find Item**, select from the list variations or SKUs to associate with the product.
3. Click on **Add Item**.

Product Edit

OverviewVariations/SKUSSEOAssociationsAssets

Find Item:

Edit Cancel OK

Add Item

Ultimate Ears-Metro.fi 150 Noise Isolating Earphones (Black)

510 Headset Charger

Plantronics Voyager 510 - Bluetooth Headset Carrying Case

Adapter Car Lighter Explorer / Voyager

Apple Iphone PDA Premium Reusable LCD Screen Protector

Apple iPhone Soft Polycarbonate Slim fit Case- Silver - Cozi

Apple iPhone 1G Soft Polycarbonate Slim fit Case -Black(Co

Headphone Adapter for Apple iPhone Recessed Jack, 3.5mm

Creative Headphones HQ-140

Koss SPARKPLUG - Stereo In Ear Ear Plugs

You can add multiple associations to the product and they will appear in a list under the column headers below.

Overview Variations/SKUs SEO Associations Assets

Find Item:

Edit Command	ID	Name	Qty	Group	Sort Order
	2	510 Headset Charger	1	default	0
	9	Creative Headphones HQ-140	1	default	0

SEO Tab

Search Engine Optimization can be achieved by entering the following information for the product.

- **Title** - this is the friendly name that appears in your browser's title area
- **URL** - this is what gets displayed in the browser URL window
- **Description** - this is the meta description that is used for SEO purposes by search engines
- **Keywords** - keywords used for SEO purposes by search engines



If the Url field is left empty, it will be automatically filled in with a generated url (which depends on the entry name). If the Url field is not empty (you entered some url), it will be saved as it is, and w will not be changed automatically even if you change an entry name. If you need the url to change, leave it blank.

The screenshot shows the 'Product Edit' form in the Commerce Manager interface, specifically the 'SEO' tab. The form is organized into three language sections: English (en-us), German (de-de), and Spanish (es-es). Each section contains four input fields: 'Title', 'Url', 'Description', and 'Keywords'. The 'Description' and 'Keywords' fields are accompanied by vertical scrollbars. At the bottom of the form, there are 'OK' and 'Cancel' buttons.

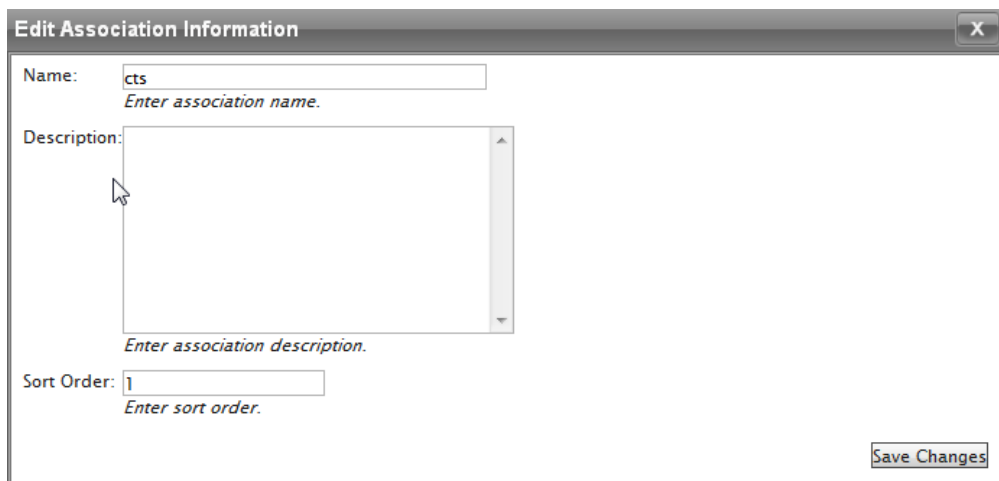
Associations Tab

Different products or variations/SKUs can be linked to this product. Follow these steps to create product associations:

1. Click on **Add an Association**. A pop-up window will appear that says **Edit Association Information**.

The screenshot shows the 'Product Edit' form in the Commerce Manager interface, specifically the 'Associations' tab. The form has a tabbed interface with 'Overview', 'Variations/SKUs', 'SEO', 'Associations', and 'Assets'. The 'Associations' tab is active, showing a button labeled 'Add an association' with a mouse cursor hovering over it. Below this button is a 'Modify Existing Association' section with a dropdown menu and three buttons: 'Edit Details', 'Modify Association', and 'Delete'. At the bottom, there are 'OK' and 'Cancel' buttons.

2. When the pop-up appears, enter an **Association Name**, **Description**, and define the **Sort Order**. Once you're done, click on **Save Changes**.



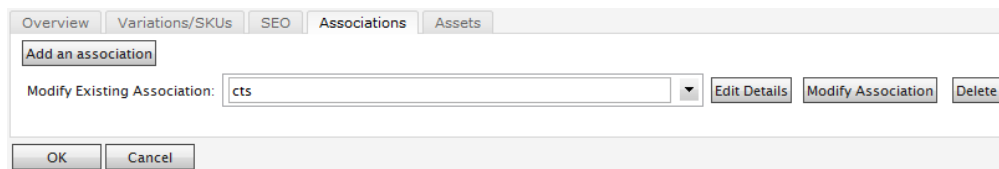
Edit Association Information

Name:
Enter association name.

Description:
Enter association description.

Sort Order:
Enter sort order.

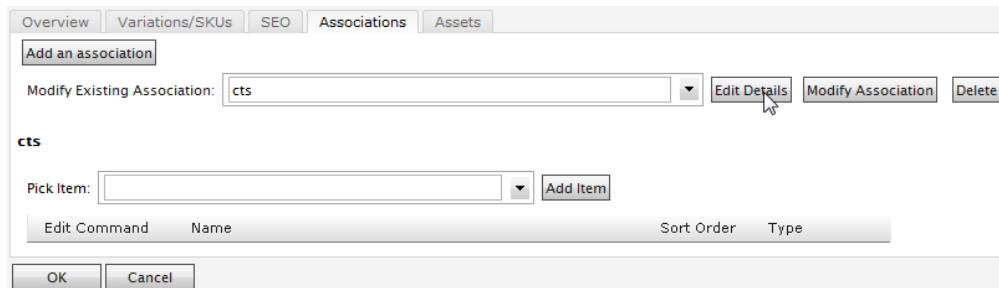
3. The new association will appear in the drop-down list.



Overview Variations/SKUs SEO **Associations** Assets

Modify Existing Association:

4. You can also choose to **Edit Details**, which will allow you to edit associated items. The **Pick Item** drop-down appears below **Modify Existing Association**.



Overview Variations/SKUs SEO **Associations** Assets

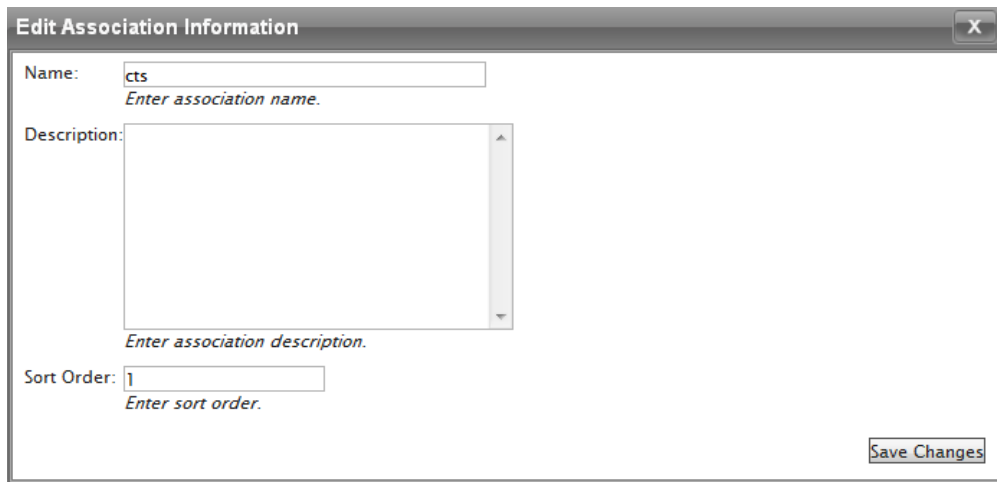
Modify Existing Association:

cts

Pick Item:

Edit Command	Name	Sort Order	Type
--------------	------	------------	------

5. Click on **Modify Association** and you can edit the name, description, and sort order of an existing association.



Edit Association Information

Name:
Enter association name.

Description:
Enter association description.

Sort Order:
Enter sort order.

[Save Changes](#)

You can also **Delete** an association if needed.

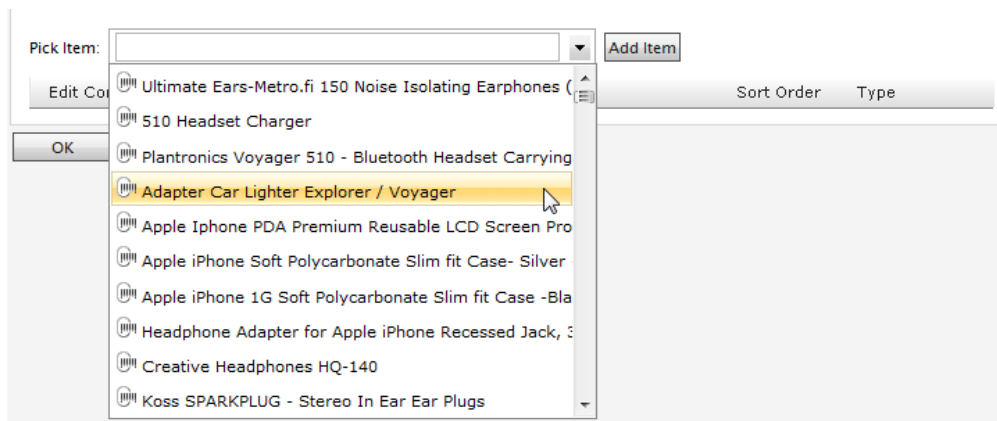


Overview Variations/SKUs SEO **Associations** Assets

[Add an association](#)

Modify Existing Association: [Edit Details](#) [Modify Association](#) [Delete](#)

6. Pick an item or items to add to the association. Click **Add Item** to do so.



Pick Item: [Add Item](#)

[Edit Command](#) [OK](#)

- Ultimate Ears-Metro.fi 150 Noise Isolating Earphones (
- 510 Headset Charger
- Plantronics Voyager 510 - Bluetooth Headset Carrying
- Adapter Car Lighter Explorer / Voyager**
- Apple iPhone PDA Premium Reusable LCD Screen Pro
- Apple iPhone Soft Polycarbonate Slim fit Case- Silver
- Apple iPhone 1G Soft Polycarbonate Slim fit Case -Bla
- Headphone Adapter for Apple iPhone Recessed Jack, 3
- Creative Headphones HQ-140
- Koss SPARKPLUG - Stereo In Ear Ear Plugs

Sort Order	Type
------------	------

7. Once you click on **Add Item**, the item will appear in a list just below. You can have more than one item tied to an association.



Pick Item: [Add Item](#)

Edit Command	Name	Sort Order	Type
	510 Headset Charger	0	OPTIONAL
	Creative Headphones HQ-140	0	OPTIONAL

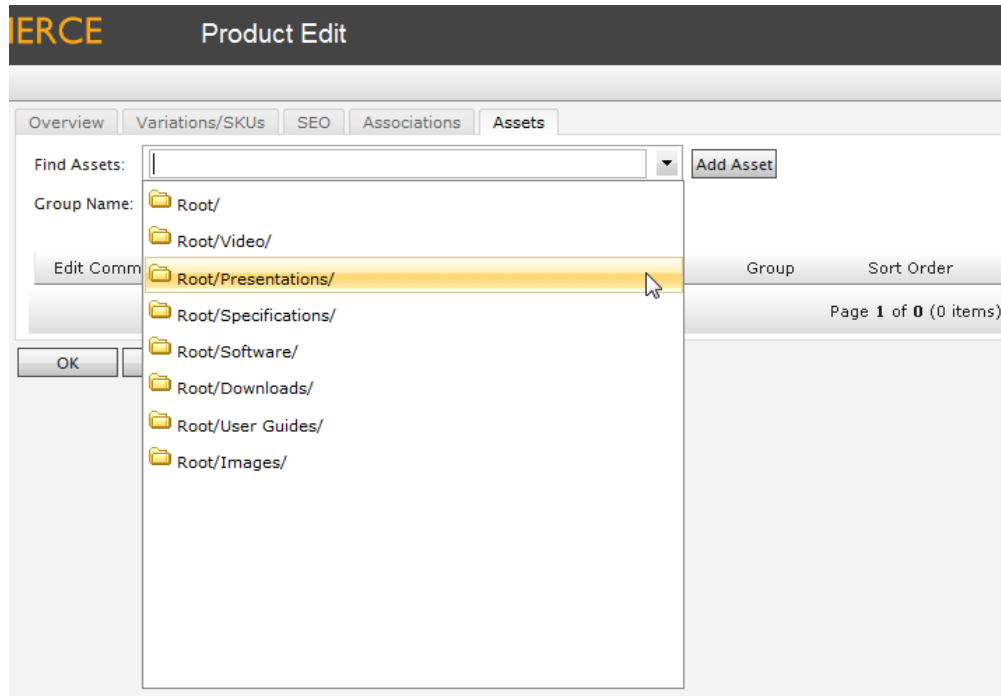
[OK](#) [Cancel](#)

You can **Edit** an item on the list. You can change the **Sort Order** and the **Type**. Once you're done modifying the values, click on **Update** to save your changes. Otherwise select **Cancel** to navigate away without saving.

Assets Tab

Assets are downloadable contents such as documents, links, videos, and images that can be linked to specific products. Assets are uploaded and managed in the Asset Management subsystem.

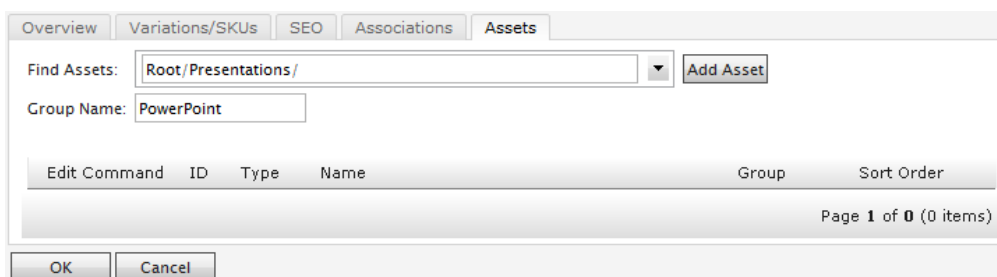
1. Under **Find Assets**, select from the drop-down list and click **Add Asset**.



2. Enter a **Group Name**.

By default EPiServer Commerce offers three options with names that will allow the associated assets to be correctly displayed on the product details page of the public site.

- **Image** - (type as "image," all lowercase) thumbnail icon(s) will appear on the product details page
- **Downloads** - a "Downloads" tab will appear towards the bottom of the details page
- **Specifications** - a "Specifications" tab will appear towards the bottom of the details page



3. Once an asset is added to the list below, you can choose to edit specific assets, such as their **Group** name and **Sort Order**.

Overview Variations/SKUs SEO Associations **Assets**

Find Assets:

Group Name:

Edit Command	ID	Type	Name	Group	Sort Order
	3	folder	Root/Presentations/	PowerPoint	0

1 Page 1 of 1 (1 items)

4. Once done, click **OK** and the new category/node will be created. You will be redirected to the Node List. Otherwise, select **Cancel** to go back to the Node List without saving any changes.

Editing Product Tabs

When creating a Product, options are divided by tabbed navigation.

Overview Tab

This is where you enter basic information about the Product.

- **Name** - a name for the product
- **Available from** - the date to which the product is activated
- **Expires on** - the date on which the product expires; once the expiration date passes, the product will no longer appear on the public site
- **Display Template** - choose a display template used to show the products in the public site from this drop-down box; by default, the only available catalog display template is "Digital Camera". To create your custom template, you will need some technical skills with html templates.
- **Code** - enter a product code here (e.g. DIGICAM1, DIGCAM2,...)
- **Sort Order** - determines the order to which the product is sorted in the Node List page
- **Available** - select Yes to make the product appear on the public site; select No to hide the product from the public site
- **Meta Class** - the choice made here dictates which the meta-fields or product attributes will appear on the public site or Commerce Manager site

EPiSERVER Product Edit

Overview Variations/SKUs SEO Associations Assets

Name:

Available from:

Expires on:

Display Template:

Code:

Sort Order:
The sort order for the category entry.

Available: ☐ Yes ☒ No

Meta Class:

OK Cancel

Depending on the meta class selected, more fields are available to enter data. For instance, selecting the Digital Camera meta class will yield digital camera meta fields and attributes.

Overview Variations/SKUs SEO Associations Assets

Name:

Available from:

Expires on:

Display Template:

Code:

Sort Order:
The sort order for the category entry.

Available: ☐ Yes ☒ No

Meta Class:

Display Name (en-us):

Display Name (de-de):

Display Name (es-es):

Primary Image (en-us):

Primary Image

Description (en-us):

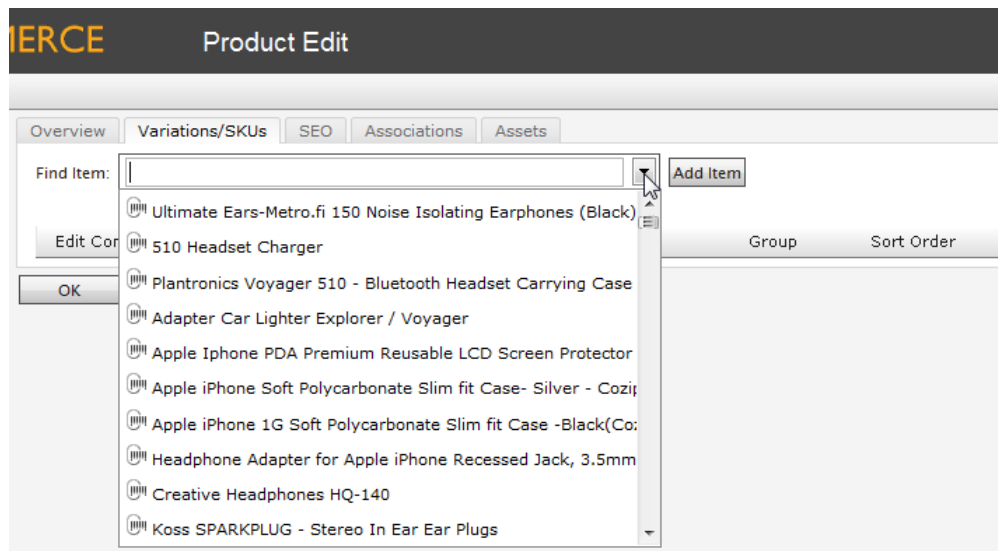
Css Class Paragraph Default Font Size

Variations/SKU Tab

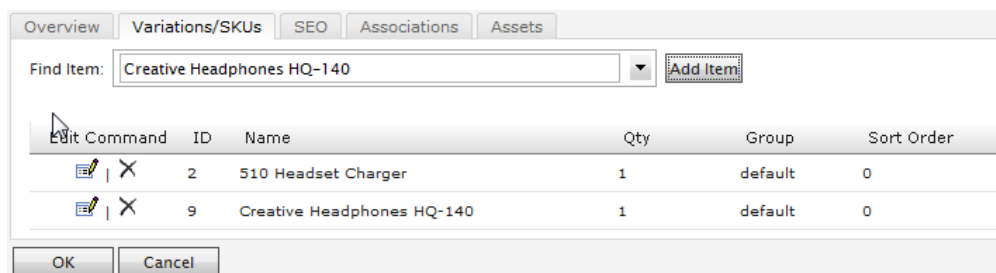
Variations/SKUs are subcategories of a Product, which represents different "variations" of the particular product (colors, sizes, different editions for example). Such Variations/SKUs can be grouped a chosen product from this tabbed page. Follow these steps to group variations/SKUs.

1. Select the **Variations/SKUs** tab

2. Within the drop-down menu next to **Find Item**, select from the list variations or SKUs to associate with the product.
3. Click on **Add Item**.



You can add multiple associations to the product and they will appear in a list under the column headers below.



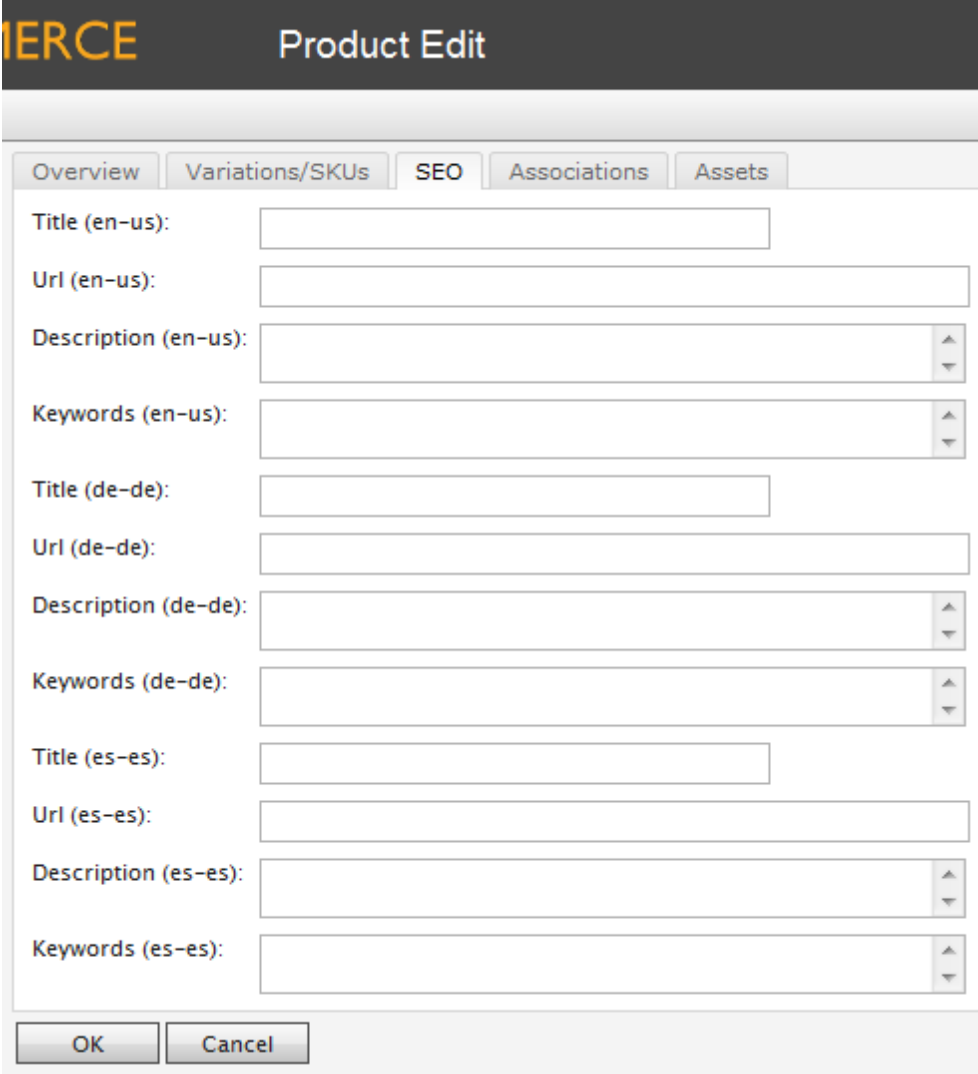
SEO Tab

Search Engine Optimization can be achieved by entering the following information for the product.

- **Title** - this is the friendly name that appears in your browser's title area
- **URL** - this is what gets displayed in the browser URL window
- **Description** - this is the meta description that is used for SEO purposes by search engines
- **Keywords** - keywords used for SEO purposes by search engines



If the Url field is left empty, it will be automatically filled in with a generated url (which depends on the entry name). If the Url field is not empty (you entered some url), it will be saved as it is, and w will not be changed automatically even if you change an entry name. If you need the url to change, leave it blank.



EPiSERVER Commerce Product Edit

Overview Variations/SKUs **SEO** Associations Assets

Title (en-us):

Url (en-us):

Description (en-us):

Keywords (en-us):

Title (de-de):

Url (de-de):

Description (de-de):

Keywords (de-de):

Title (es-es):

Url (es-es):

Description (es-es):

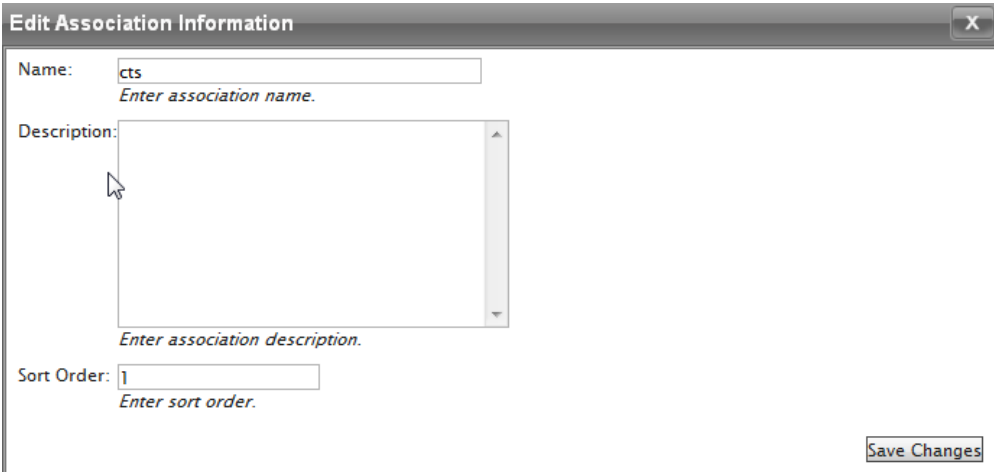
Keywords (es-es):

OK Cancel

Associations Tab

Different products or variations/SKUs can be linked to this product. Follow these steps to create product associations:

- I. Click on **Add an Association**. A pop-up window will appear that says **Edit Association Information**.



Edit Association Information [X]

Name:
Enter association name.

Description:
Enter association description.

Sort Order:
Enter sort order.

Save Changes

3. The new association will appear in the drop-down list.

Overview Variations/SKUs SEO Associations Assets

Add an association

Modify Existing Association: cts Edit Details Modify Association Delete

OK Cancel

4. You can also choose to **Edit Details**, which will allow you to edit associated items. The **Pick Item** drop-down appears below **Modify Existing Association**.

Overview Variations/SKUs SEO Associations Assets

Add an association

Modify Existing Association: cts Edit Details Modify Association Delete

cts

Pick Item: Add Item

Edit Command	Name	Sort Order	Type
--------------	------	------------	------

OK Cancel

5. Click on **Modify Association** and you can edit the name, description, and sort order of an existing association.

Edit Association Information

Name: cts
Enter association name.

Description:
Enter association description.

Sort Order: 1
Enter sort order.

Save Changes

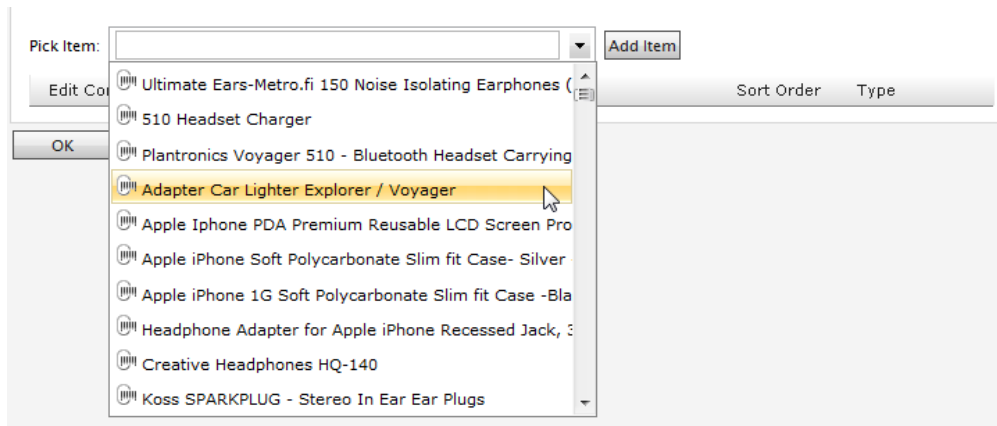
You can also **Delete** an association if needed.

Overview Variations/SKUs SEO Associations Assets

Add an association

Modify Existing Association: cts Edit Details Modify Association Delete

6. Pick an item or items to add to the association. Click **Add Item** to do so.



7. Once you click on **Add Item**, the item will appear in a list just below. You can have more than one item tied to an association.

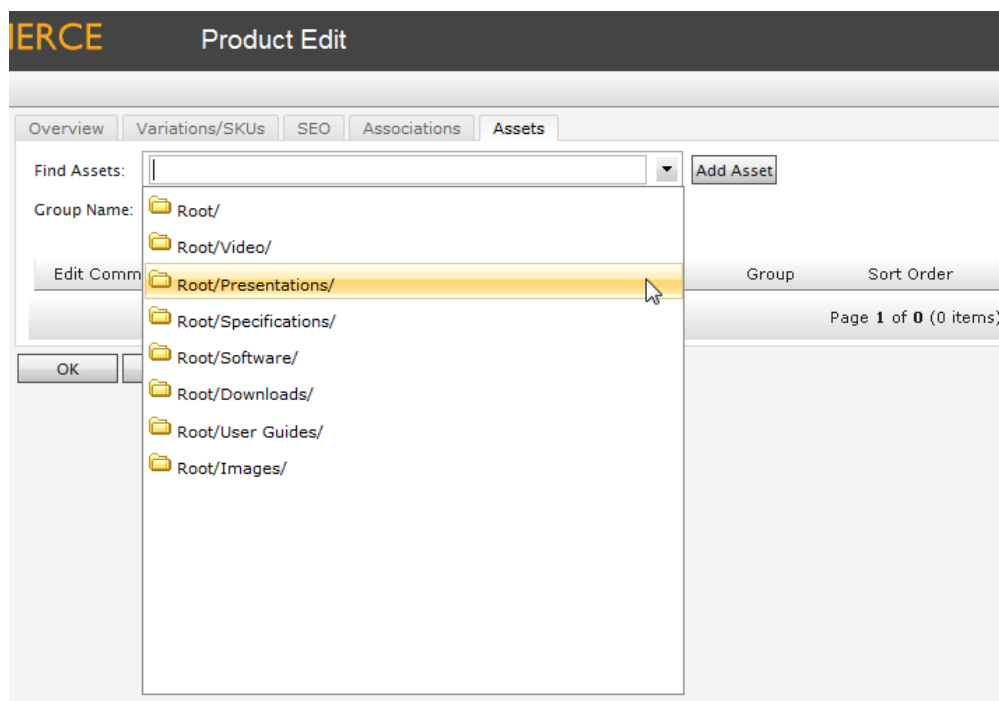


You can **Edit** an item on the list. You can change the **Sort Order** and the **Type**. Once you're done modifying the values, click on **Update** to save your changes. Otherwise select **Cancel** to navigate away without saving.

Assets Tab

Assets are downloadable contents such as documents, links, videos, and images that can be linked to specific products. Assets are uploaded and managed in the Asset Management subsystem.

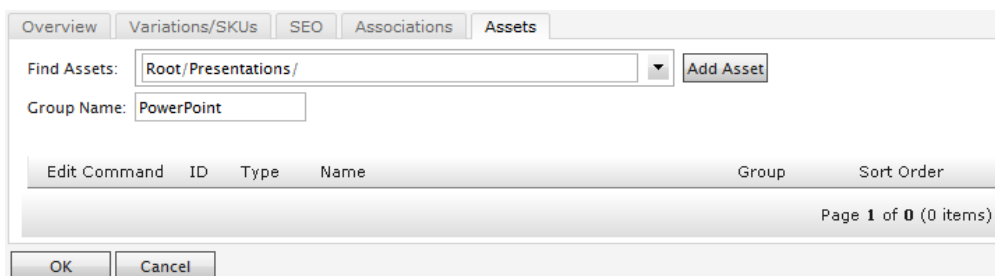
1. Under **Find Assets**, select from the drop-down list and click **Add Asset**.



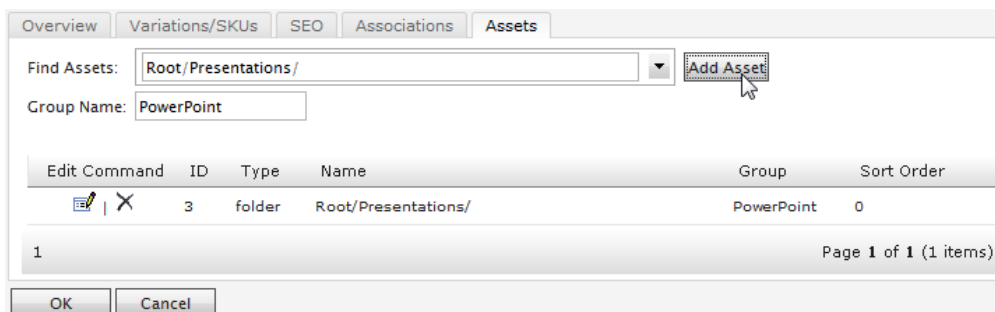
2. Enter a **Group Name**.

By default Commerce Manager offers three options with names that will allow the associated assets to be correctly displayed on the product details page of the public site.

- **Image** - (type as "image," all lowercase) thumbnail icon(s) will appear on the product details page
- **Downloads** - a "Downloads" tab will appear towards the bottom of the details page
- **Specifications** - a "Specifications" tab will appear towards the bottom of the details page



3. Once an asset is added to the list below, you can choose to edit specific assets, such as their **Group** name and **Sort Order**.



4. Once done, click **OK** and the new category/node will be created. You will be redirected to the Node List. Otherwise, select **Cancel** to go back to the Node List without saving any changes.

Creating a Variation or a SKU

1. Click on **Catalogs**. The Catalog List appears on the main window.
2. Click on an existing catalog name highlighted in blue. The Node List window appears.
3. Click on **Create New** pull-down menu located in the upper left part of the main window.
4. On the drop-down menu, select **New Variation/SKU**. The New Variation/SKU Edit page appears.

Overview Tab

This is where you enter basic information about the Product.

- **Name** - a name for the Variation/SKU
- **Available from** - the date to which the Variation/SKU is activated
- **Expires on** - the date on which the Variation/SKU expires; once the expiration date passes, the Variation/SKU will no longer appear on the public site
- **Display Template** - choose a display template used to show the Variation/SKU in the public site from this dropdown box; by default, the only available catalog display template is "Digital Camera". To create your custom template, you will need some technical skills with html templates.
- **Code** - enter a Variation/SKU code here (e.g. DIGICAM).
- **Sort Order** - determines the order to which the Variation/SKU is sorted in the Node List page.
- **Available** - select Yes to make the Variation/SKU appear on the public site; select No to hide the product from the public site
- **Meta Class** - the choice made here dictates which the meta-fields or Variation/SKU attributes will appear on the public site or Commerce Manager site

Pricing/Inventory Tab

- **Display Price** - the price that will be displayed in public site
- **Min Quantity** - this forces your customer to purchase a minimum number of items as set here (this number gets displayed as the lower range in the dropdown during the checkout process)
- **Max Quantity** - this is the maximum allowable number of items that can be purchased at one time (this number gets displayed as the upper range in the dropdown during the checkout process)
- **Merchant** - (optional) if you use many merchants on your site, this provides another way to add more information for a product; this can only be added/edited directly in the database so please contact your site administrator/developer to make any changes
- **Weight** - based on your shipping configuration, the weight you enter here will affect the total shipping cost
- **Package** - this value is based on width/length/height dimensions; the options for this dropdown are configured in the Administration area
- **Tax Category** - this separation of taxes by category allows you to charge a different rate of taxes depending on what is being purchased; for example, you can have one rate for "General Sales" items and another rate for "Luxury Sales" items
- **Warehouse** - the details on the available selections are maintained in the Administration Subsystem

- **Track Inventory** - Yes/No. If this is set to "Yes," then the quantity value of In Stock, Preorder, and Backorder fields will be deducted each time a purchase is made. If this is set to "No," then those values will not change.
- **Inventory Status** - Enable/Disable. If this is Enabled, then the number of units of a product being purchased cannot exceed the inventory value. In other words, the check out procedure cannot be completed if you exceed the number in the inventory -- instead the quantity you can purchase will default to the actual number of remaining units. For instance, if you have Tracking Inventory = Yes, and Inventory Status = Disabled/Ignored, then the available quantity will be monitored, but it will not limit the number of units that can be checked out. If you only have a quantity of 5 and you order 6 items, the checkout will still complete and the inventory number will become -1.
- **In Stock** - you can enter the quantity of a particular product available for sale
- **Reserved** - The quantity you set here allows you to reserve a specified number of inventory "In Stock" and prevent them from being used. So for instance, if you set the In Stock = 10 and Reserved = 5, then the In Stock count will not go below 5.
- **Reorder Min Qty** - If the inventory falls below the value specified here, then this item will appear in the "Low Stock Report" in the Dashboard or Reporting subsystem.
- **Allow Preorder/Backorder** - Yes or No; you need to set Allow Preorder/Backorder status to Yes to turn either of these features On.
- **Preorder/Backorder Avail** - When you turn on either of the two and specify a quantity, the count will begin to decrease after the In Stock count reaches its limit. For example, if you set In Stock = 10, Reserved = 3, and Backorder = 10, then the Backorder qty will start to decrease after In Stock count reaches 3. So if you place an order for 10 units, then the final count will be In Stock = 3, Reserved = 3, and Backorder = 7.
- **Backorder Qty** - The quantity you set here will determine the backorders that can be made by customers even when the item is out of stock.

Pricing

- **Sale Type** - you can select All Customers, a single Customer or a Customer Price Group (the Customer Price Group gives you the ability to create tiered pricing)
- **Sale Code** - (optional) enter code to give special pricing for a group of Customers (i.e. Dealers)
- **Unit Price** - discounted price per unit
- **Currency** - enter currency using the correct currency code (i.e. USD); you can create different prices depending on the currency that is selected
- **Min. Quantity** - minimum number of units you must purchase to get the discounted bulk rate

SEO Tab

Search Engine Optimization can be achieved by entering the following information for the product.

- **Title** - this is the friendly name that appears in your browser's title area
- **URL** - this is what gets displayed in the browser URL window
- **Description** - this is the meta description that is used for SEO purposes by search engines
- **Keywords** - keywords used for SEO purposes by search engines

Associations Tab

Different products or variations/SKUs can be linked to this Variation/SKU. Follow these steps to create associations:

1. Click on **Add an Association**. A pop-up window will appear that says **Edit Association Information**.
2. When the pop-up appears, enter an **Association Name**, **Description**, and define the **Sort Order**. Once you're done, click on **Save Changes**.
3. The new association will appear in the drop-down list.
4. You can also choose to **Edit Details**, which will allow you to edit associated items. The **Pick Item** drop-down appears below **Modify Existing Association**.
5. Click on **Modify Association** and you can edit the name, description, and sort order of an existing association.

You can also **Delete** an association if needed.

6. Pick an item or items to add to the association. Click **Add Item** to do so.
7. Once you click on Add Item, the item will appear in a list just below. You can have more than one item tied to an association.

You can **Edit** an item on the list. You can change the **Sort Order** and the **Type**. Once you're done modifying the values, click on **Update** to save your changes. Otherwise select **Cancel** to navigate away without saving.

Assets Tab

Assets are downloadable contents such as documents, links, videos, and images that can be linked to specific products. Assets are uploaded and managed in the Asset Management subsystem.

1. Under **Find Assets**, select from the drop-down list and click Add Asset.
2. Enter a **Group Name**.

By default Commerce Manager offers three options with names that will allow the associated assets to be correctly displayed on the product details page of the public site.

- **Image** - (type as "image," all lowercase) thumbnail icon(s) will appear on the product details page
- **Downloads** - a "Downloads" tab will appear towards the bottom of the details page
- **Specifications** - a "Specifications" tab will appear towards the bottom of the details page

3. Once an asset is added to the list below, you can choose to edit specific assets, such as their **Group** name and **Sort Order**.
4. Once done, click **OK** and the new category/node will be created. You will be redirected to the Node List. Otherwise, select **Cancel** to go back to the Node List without saving any changes.

Creating a Package

1. Click on **Catalogs**. The Catalog List appears on the main window.
2. Click on an existing catalog name highlighted in blue. The **Node List** window appears.
3. Click on **Create New** pull-down menu located in the upper left part of the main window.
4. On the drop-down menu, select **New Product Package**. The Product Package Edit page appears.

Overview Tab

This is where you enter basic information about the Product Package.

- **Name** - a name for the Product Package
- **Available from** - the date to which the Product Package is activated

- **Expires on** - the date on which the Product Package expires; once the expiration date passes, the Product Package will no longer appear on the public site
- **Display Template** - choose a display template used to show the Product Package in the public site from this dropdown box; by default, the only available catalog display template is "Digital Camera". To create your custom template, you will need some technical skills with html templates.
- **Code** - enter a Product Package code here (e.g. DIGICAM).
- **Sort Order** - determines the order to which the Product Package is sorted in the Node List page.
- **Available** - select Yes to make the Product Package appear on the public site; select No to hide the product from the public site
- **Meta Class** - the choice made here dictates which the meta-fields or Product Package attributes will appear on the public site or Commerce Manager site

Pricing/Inventory Tab

- **Display Price** - the price that will be displayed in public site
- **Min Quantity** - this forces your customer to purchase a minimum number of items as set here (this number gets displayed as the lower range in the dropdown during the checkout process)
- **Max Quantity** - this is the maximum allowable number of items that can be purchased at one time (this number gets displayed as the upper range in the dropdown during the checkout process)
- **Merchant** - (optional) if you use many merchants on your site, this provides another way to add more information for a product; this can only be added/edited directly in the database so please contact your site administrator/developer to make any changes
- **Weight** - based on your shipping configuration, the weight you enter here will affect the total shipping cost
- **Package** - this value is based on width/length/height dimensions; the options for this dropdown are configured in the Administration area
- **Tax Category** - this separation of taxes by category allows you to charge a different rate of taxes depending on what is being purchased; for example, you can have one rate for "General Sales" items and another rate for "Luxury Sales" items
- **Warehouse** - the details on the available selections are maintained in the Administration Subsystem
- **Track Inventory** - Yes/No. If this is set to "Yes," then the quantity value of In Stock, Preorder, and Backorder fields will be deducted each time a purchase is made. If this is set to "No," then those values will not change.
- **Inventory Status** - Enable/Disable. If this is Enabled, then the number of units of a product being purchased cannot exceed the inventory value. In other words, the check out procedure cannot be completed if you exceed the number in the inventory -- instead the quantity you can purchase will default to the actual number of remaining units. For instance, if you have Tracking Inventory = Yes, and Inventory Status = Disabled/Ignored, then the available quantity will be monitored, but it will not limit the number of units that can be checked out. If you only have a quantity of 5 and you order 6 items, the checkout will still complete and the inventory number will become -1.
- **In Stock** - you can enter the quantity of a particular product available for sale
- **Reserved** - The quantity you set here allows you to reserve a specified number of inventory "In Stock" and prevent them from being used. So for instance, if you set the In Stock = 10 and Reserved = 5, then the In Stock count will not go below 5.
- **Reorder Min Qty** - If the inventory falls below the value specified here, then this item will appear in the "Low Stock Report" in the Dashboard or Reporting subsystem.

- **Allow Preorder/Backorder** - Yes or No; you need to set Allow Preorder/Backorder status to Yes to turn either of these features On.
- **Preorder/Backorder Avail** - When you turn on either of the two and specify a quantity, the count will begin to decrease after the In Stock count reaches its limit. For example, if you set In Stock = 10, Reserved = 3, and Backorder = 10, then the Backorder qty will start to decrease after In Stock count reaches 3. So if you place an order for 10 units, then the final count will be In Stock = 3, Reserved = 3, and Backorder = 7.
- **Backorder Qty** - The quantity you set here will determine the backorders that can be made by customers even when the item is out of stock.

Pricing

- **Sale Type** - you can select All Customers, a single Customer or a Customer Price Group (the Customer Price Group gives you the ability to create tiered pricing)
- **Sale Code** - (optional) enter code to give special pricing for a group of Customers (i.e. Dealers)
- **Unit Price** - discounted price per unit
- **Currency** - enter currency using the correct currency code (i.e. USD); you can create different prices depending on the currency that is selected
- **Min. Quantity** - minimum number of units you must purchase to get the discounted bulk rate

Package Items Tab

In the dropdown, you can search through your entire inventory and select items to add to your Package by clicking **Add Item**. Clicking the **Edit** icon beside the item you just added will allow you to specify the **Quantity**, the **Group Name** and the **Sort Order**.

SEO Tab

Search Engine Optimization can be achieved by entering the following information for the product.

- **Title** - this is the friendly name that appears in your browser's title area
- **URL** - this is what gets displayed in the browser URL window
- **Description** - this is the meta description that is used for SEO purposes by search engines
- **Keywords** - keywords used for SEO purposes by search engines



If the **Url** field is left empty, it will be automatically filled in with a generated url (which depends on the entry name). If the Url field is not empty (you entered some url), it will be saved as it is, and will not be changed automatically even if you change an entry name. If you need the url to change, leave it blank.

Associations Tab

Different products or variations/SKUs can be linked to this Product Package. Follow these steps to create associations:

1. Click on **Add an Association**. A pop-up window will appear that says **Edit Association Information**.
2. When the pop-up appears, enter an **Association Name**, **Description**, and define the **Sort Order**. Once you're done, click on **Save Changes**.
3. The new association will appear in the drop-down list.

4. You can also choose to **Edit Details**, which will allow you to edit associated items. The **Pick Item** drop-down appears below **Modify Existing Association**.
5. Click on **Modify Association** and you can edit the name, description, and sort order of an existing association.

You can also **Delete** an association if needed.

6. Pick an item or items to add to the association. Click **Add Item** to do so.
7. Once you click on Add Item, the item will appear in a list just below. You can have more than one item tied to an association.

You can **Edit** an item on the list. You can change the **Sort Order** and the **Type**. Once you're done modifying the values, click on **Update** to save your changes. Otherwise select **Cancel** to navigate away without saving.

Assets Tab

Assets are downloadable contents such as documents, links, videos, and images that can be linked to specific products. Assets are uploaded and managed in the Asset Management subsystem.

1. Under **Find Assets**, select from the drop-down list and click **Add Asset**.
2. Enter a **Group Name**.

By default Commerce Manager offers three options with names that will allow the associated assets to be correctly displayed on the product details page of the public site.

- **Image** - (type as "image," all lowercase) thumbnail icon(s) will appear on the product details page
- **Downloads** - a "Downloads" tab will appear towards the bottom of the details page
- **Specifications** - a "Specifications" tab will appear towards the bottom of the details page

3. Once an asset is added to the list below, you can choose to edit specific assets, such as their **Group** name and **Sort Order**.
4. Once done, click **OK** and the new category/node will be created. You will be redirected to the Node List. Otherwise, select **Cancel** to go back to the Node List without saving any changes.

Creating a Bundle

1. Click on **Catalogs**. The Catalog List appears on the main window.
2. Click on an existing catalog name highlighted in blue. The Node List window appears.
3. Click on **Create New** pull-down menu located in the upper left part of the main window.
4. On the drop-down menu, select **New Bundle**. The Bundle Edit page appears.

Overview Tab

This is where you enter basic information about the Product Package.

- **Name** - a name for the Bundle
- **Available from** - the date to which the Bundle is activated
- **Expires on** - the date on which the Bundle expires; once the expiration date passes, the Bundle will no longer appear on the public site

- **Display Template** - choose a display template used to show the Bundle in the public site from this drop-down box; by default, the only available catalog display template is "Digital Camera". To create your custom template, you will need some technical skills with html templates.
- **Code** - enter a Bundle code here (e.g. DIGICAM).
- **Sort Order** - determines the order to which the Bundle is sorted in the Node List page.
- **Available** - select Yes to make the Bundle appear on the public site; select No to hide the product from the public site
- **Meta Class** - the choice made here dictates which the meta-fields or Bundle attributes will appear on the public site or Commerce Manager site

Bundle Items Tab

In the dropdown, you can search through your entire inventory and select items to add to your Bundle by clicking **Add Item**. Clicking the **Edit** icon beside the item you just added will allow you to specify the Quantity, the Group Name and the Sort Order.

SEO Tab

Search Engine Optimization can be achieved by entering the following information for the product.

- **Title** - this is the friendly name that appears in your browser's title area
- **URL** - this is what gets displayed in the browser URL window
- **Description** - this is the meta description that is used for SEO purposes by search engines
- **Keywords** - keywords used for SEO purposes by search engines



If the **Url** field is left empty, it will be automatically filled in with a generated url (which depends on the entry name). If the Url field is not empty (you entered some url), it will be saved as it is, and w will not be changed automatically even if you change an entry name. If you need the url to change, leave it blank.

Associations Tab

Different products or variations/SKUs can be linked to this Bundle. Follow these steps to create associations:

1. Click on **Add an Association**. A pop-up window will appear that says **Edit Association Information**.
2. When the pop-up appears, enter an **Association Name**, **Description**, and define the **Sort Order**. Once you're done, click on **Save Changes**.
3. The new association will appear in the drop-down list.
4. You can also choose to **Edit Details**, which will allow you to edit associated items. The **Pick Item** drop-down appears below **Modify Existing Association**.
5. Click on **Modify Association** and you can edit the name, description, and sort order of an existing association.

You can also **Delete** an association if needed.

6. Pick an item or items to add to the association. Click **Add Item** to do so.
7. Once you click on Add Item, the item will appear in a list just below. You can have more than one item tied to an association.

You can **Edit** an item on the list. You can change the **Sort Order** and the **Type**. Once you're done modifying the values, click on **Update** to save your changes. Otherwise select **Cancel** to navigate away without saving.

Assets Tab

Assets are downloadable contents such as documents, links, videos, and images that can be linked to specific products. Assets are uploaded and managed in the Asset Management subsystem.

1. Under **Find Assets**, select from the drop-down list and click **Add Asset**.

2. Enter a **Group Name**.

By default Commerce Manager offers three options with names that will allow the associated assets to be correctly displayed on the product details page of the public site.

- **Image** - (type as "image," all lowercase) thumbnail icon(s) will appear on the product details page
- **Downloads** - a "Downloads" tab will appear towards the bottom of the details page
- **Specifications** - a "Specifications" tab will appear towards the bottom of the details page

3. Once an asset is added to the list below, you can choose to edit specific assets, such as their **Group** name and **Sort Order**.

4. Once done, click **OK** and the new category/node will be created. You will be redirected to the Node List. Otherwise, select **Cancel** to go back to the Node List without saving any changes.

Creating a Dynamic Package

1. Click on **Catalogs**. The Catalog List appears on the main window.
2. Click on an existing catalog name highlighted in blue. The Node List window appears.
3. Click on **Create New** pull-down menu located in the upper left part of the main window.
4. On the drop-down menu, select **New Dynamic Package**. The Product Dynamic Package Edit page appears.

Overview Tab

This is where you enter basic information about the Product Package.

- **Name** - a name for the Dynamic Package
- **Available from** - the date to which the Dynamic Package is activated
- **Expires on** - the date on which the Dynamic Package expires; once the expiration date passes, the Product Package will no longer appear on the public site
- **Display Template** - choose a display template used to show the Dynamic Package in the public site from this dropdown box; by default, the only available catalog display template is "Digital Camera". To create your custom template, you will need some technical skills with html templates.
- **Code** - enter a Dynamic Package code here (e.g. DIGICAM).
- **Sort Order** - determines the order to which the Dynamic Package is sorted in the Node List page.
- **Available** - select Yes to make the Dynamic Package appear on the public site; select No to hide the product from the public site
- **Meta Class** - the choice made here dictates which the meta-fields or Dynamic Package attributes will appear on the public site or Commerce Manager site

Package Items Tab

In the dropdown, you can search through your entire inventory and select items to add to your Dynamic Package by clicking **Add Item**. Clicking the Edit icon beside the item you just added will allow you to specify the Quantity, the Group Name and the Sort Order.

SEO Tab

Search Engine Optimization can be achieved by entering the following information for the product.

- **Title** - this is the friendly name that appears in your browser's title area
- **URL** - this is what gets displayed in the browser URL window
- **Description** - this is the meta description that is used for SEO purposes by search engines
- **Keywords** - keywords used for SEO purposes by search engines



If the **Url** field is left empty, it will be automatically filled in with a generated url (which depends on the entry name). If the Url field is not empty (you entered some url), it will be saved as it is, and will not be changed automatically even if you change an entry name. If you need the url to change, leave it blank.

Associations Tab

Different products or variations/SKUs can be linked to this Dynamic Package. Follow these steps to create associations:

1. Click on **Add an Association**. A pop-up window will appear that says **Edit Association Information**.
2. When the pop-up appears, enter an **Association Name**, **Description**, and define the **Sort Order**. Once you're done, click on **Save Changes**.
3. The new association will appear in the drop-down list.
4. You can also choose to **Edit Details**, which will allow you to edit associated items. The **Pick Item** drop-down appears below **Modify Existing Association**.
5. Click on **Modify Association** and you can edit the name, description, and sort order of an existing association.

You can also **Delete** an association if needed.

6. Pick an item or items to add to the association. Click **Add Item** to do so.
7. Once you click on Add Item, the item will appear in a list just below. You can have more than one item tied to an association.

You can **Edit** an item on the list. You can change the **Sort Order** and the **Type**. Once you're done modifying the values, click on **Update** to save your changes. Otherwise select **Cancel** to navigate away without saving.

Assets Tab

Assets are downloadable contents such as documents, links, videos, and images that can be linked to specific products. Assets are uploaded and managed in the Asset Management subsystem.

1. Under **Find Assets**, select from the drop-down list and click **Add Asset**.
2. Enter a **Group Name**.

By default Commerce Manager offers three options with names that will allow the associated assets to be correctly displayed on the product details page of the public site.

- **Image** - (type as "image," all lowercase) thumbnail icon(s) will appear on the product details page
- **Downloads** - a "Downloads" tab will appear towards the bottom of the details page
- **Specifications** - a "Specifications" tab will appear towards the bottom of the details page

3. Once an asset is added to the list below, you can choose to edit specific assets, such as their **Group** name and **Sort Order**.

4. Once done, click **OK** and the new category/node will be created. You will be redirected to the Node List. Otherwise, select **Cancel** to go back to the Node List without saving any changes.

Creating Product Associations

Product Associations help you to highlight certain products in your public site. For example, one or more products can be related to or associated to another product so that these associated products can be displayed or advertised on the public site as a product accessory, or as an upselling/cross-selling item. Associations can be made from any of the individual products (Product Entries, SKUs, Bundles, Packages, and Dynamic Packages). (Product Entries, Variations/SKUs, Bundles, Packages, and Dynamic Packages).

To create product associations go to the edit screen of any type of product entry listed above and select the **Associations** tab.

Select the **Add an association** button to enter an association name, an optional description and sort order number. Click **Save Changes** to save and exit the screen. The new association should be added to the drop-down menu.

To edit the details, click the **Modify Association** button and the same screen will reappear.

Next select the new association that you just created from the drop-down menu and click on **Edit Details**. The association name and a new drop-down menu titled **Pick Item** will appear below.

Use the drop-down menu to add one more products and select **Add Item** to save the association. By this you will have created a new association to the existing product.

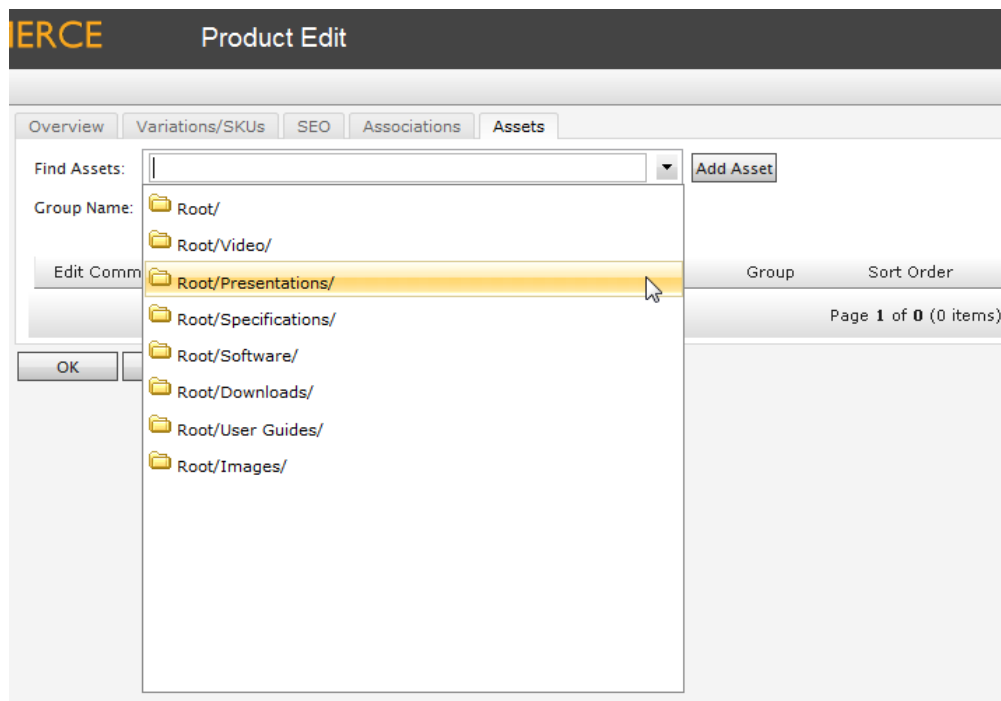
Managing Assets

Assets are downloadable contents such as documents, links, videos, and images that can be linked to specific products. Assets are uploaded and managed in the Asset Management subsystem and then these assets can be associated with catalog entries.

Associating Additional Digital Materials with Catalog Entries

Assets are downloadable contents such as documents, links, videos, and images that can be linked to specific products. Assets are uploaded and managed in the Asset Management subsystem.

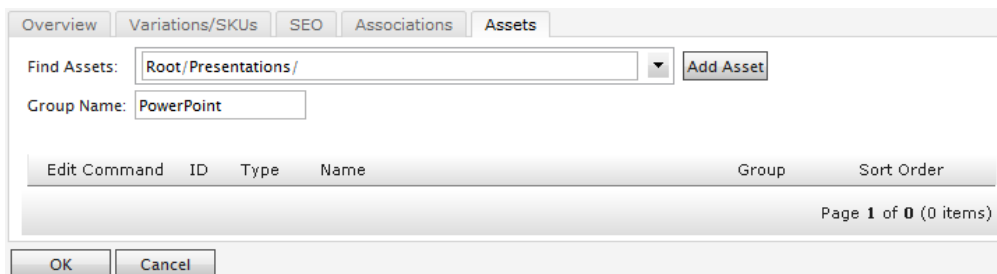
1. Under **Find Assets**, select from the drop-down list and click **Add Asset**.



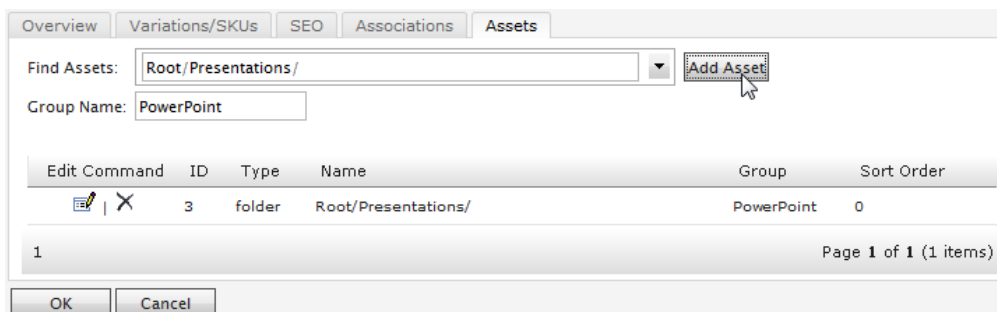
2. Enter a **Group Name**.

By default Commerce Manager offers three options with names that will allow the associated assets to be correctly displayed on the product details page of the public site.

- **Image** - (type as "image," all lowercase) thumbnail icon(s) will appear on the product details page
- **Downloads** - a "Downloads" tab will appear towards the bottom of the details page
- **Specifications** - a "Specifications" tab will appear towards the bottom of the details page



3. Once an asset is added to the list below, you can choose to edit specific assets, such as their **Group** name and **Sort Order**.

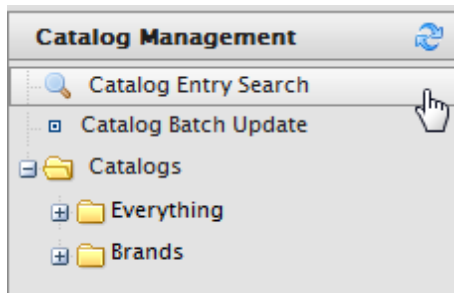


4. Once done, click **OK** and the new category/node will be created. You will be redirected to the Node List. Otherwise, select **Cancel** to go back to the Node List without saving any changes.

Searching for Entries in Your Catalog

The Catalog Search function enables you look for specific sales items stored in the Commerce Manager.

1. Click on **Catalog Management** and then **Catalog Entry Search**.



2. To do a basic search for catalog entries, enter a one keyword or more into the **Search by Keywords(s)** field, such as "canon digital cameras". The search will return entries that match either of those keywords.

3. If you input keywords around quotation marks ("canon digital cameras"), then search will only fetch entries that have those exact three keywords.

Catalog Search Filters

To narrow entry search results, there are Additional Filters available. Click search once those filters are set.

- **Filter by language:** Pull-down menu will show the available language choices
- **Filter by catalog(s):** Pull-down menu will show the available catalog choices

- **Search by code/id:** Instead of text, you can search by code or ID

Search By Keyword(s):

Additional Filters

Filter By Language: ▼

Filter By Catalog(s): ▼

Search By Code/Id:

Deleting and Cloning Entries

Users can Delete and Clone entries. To delete or clone an entry:

1. Select an entry or entries by checkmarking the box next to it.
2. Click on **More Actions**.
3. Click on **Delete Selected** or **Clone Selected**.

The entry will either be deleted or a clone (copy) of it appears.

EPiSERVER Commerce Entry Search

Search By Keyword(s):

Additional Filters

Filter By Language: ▼

Filter By Catalog(s): ▼

Search By Code/Id:

☒ More Actions ▼

- ☒ Delete Selected
- ☒ Clone Selected

	ID
<input type="checkbox"/> JBL Pro.fi 150 Noise Isolating Earphones (Black)	1
<input checked="" type="checkbox"/> 510 Headset Charger	2
<input checked="" type="checkbox"/> Plantronics Voyager 510 - Bluetooth Headset Carrying Case	3
<input type="checkbox"/> Adapter Car Lighter Explorer / Voyager	4

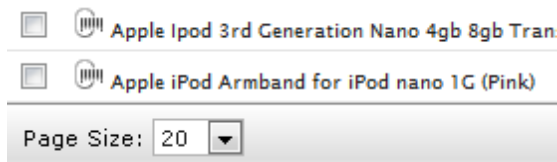
Paging and Sorting Results

Users can sort results by clicking on **Name**, **ID**, **Available From**, **Expires**, and **Status** in either ascending or descending order.

☒ More Actions ▼

<input type="checkbox"/> Name	ID	Available from	Expires	Status
<input type="checkbox"/> Apple iPhone PDA Premium Reusable LCD Screen Protector with Lint Cleaning Cloth	5	8/18/2008 2:49:48 PM	8/19/2018 2:49:48 PM	True
<input type="checkbox"/> Apple iPhone Soft Polycarbonate Slim fit Case- Silver - Cozip Brand (Made in Korea)	6	8/18/2008 2:49:49 PM	8/19/2018 2:49:49 PM	True
<input type="checkbox"/> Apple iPhone 1G Soft Polycarbonate Slim fit Case -Black(Cozip Brand) Made in Korea	7	8/18/2008 2:49:49 PM	8/19/2018 2:49:49 PM	True

Users can also change the **Page Size** ranging from 10 entries to All entries.



To page through multiple entry results, users can click on the paging controls on the lower-right corner of the main window.

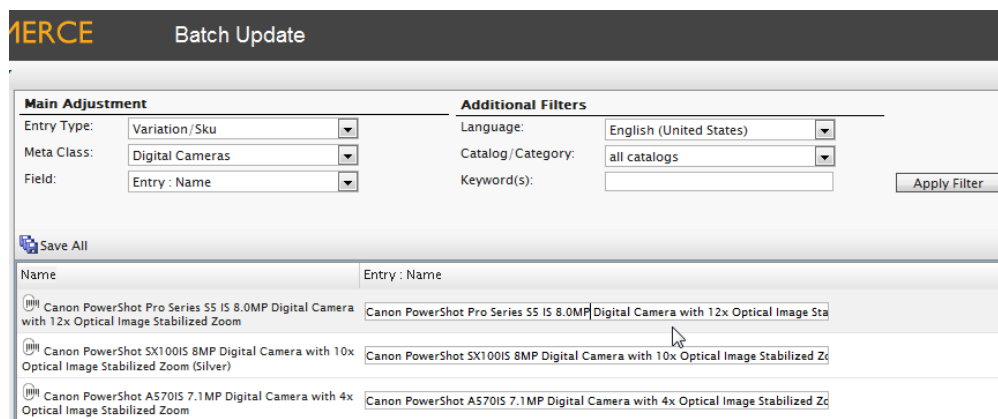


Updating Multiple Catalog Entries at Once

This area gives you the ability to quickly make mass changes to your catalog. You can sort by **Entry Type**, **Meta Class**, **Field**, **Language**, **Catalog** and **Keyword(s)**. Once you apply one or more of these filters, the search results will appear in the bottom half of the screen.

If you make changes to the entry, click **Save All** to save all of your catalog updates.

Clicking on a result, such as the example below, will direct you to the entry's edit page.



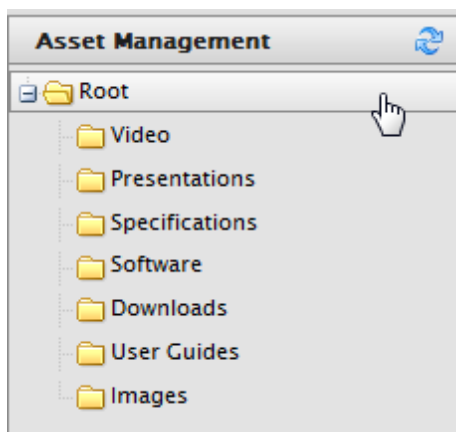
Asset Management

The Asset Management system allows for assets including images, MP3s, PDFs, software packages and other downloadable files to be centrally stored, displayed on either the front-end site or the Commerce Manager site and ultimately to be shared or purchased.

Browsing, Editing, and Deleting Folders and Assets

The Asset List page categorizes and manages downloadable Asset files. The default list of Asset folders are: **Video**, **Presentations**, **Specifications**, **Software**, **Downloads**, **User Guides**, and **Images**. These folder names can be changed.

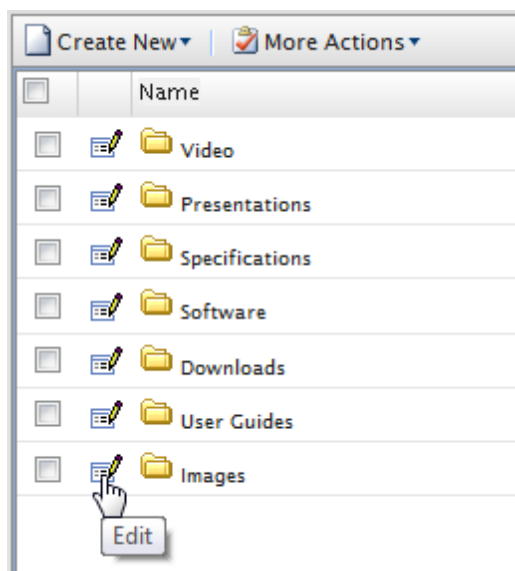
To access the Asset List, click on **Asset Management > Root** or any other folder below Root.



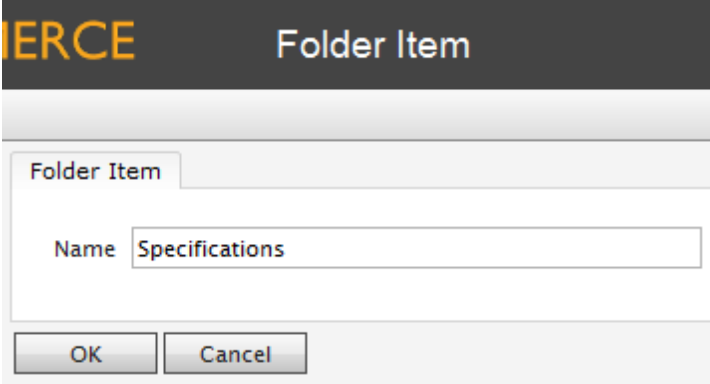
The **Asset List** shows folders and assets. The **Asset List** shows the total **Size** of the Assets and the **Created** date.

EPiServer Asset List			
Create New More Actions			
<input type="checkbox"/>	Name	Size	Created
<input type="checkbox"/>	Video		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Presentations		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Specifications		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Software		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Downloads		5/11/2010 3:34:57 PM
<input type="checkbox"/>	User Guides		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Images		5/11/2010 3:34:57 PM

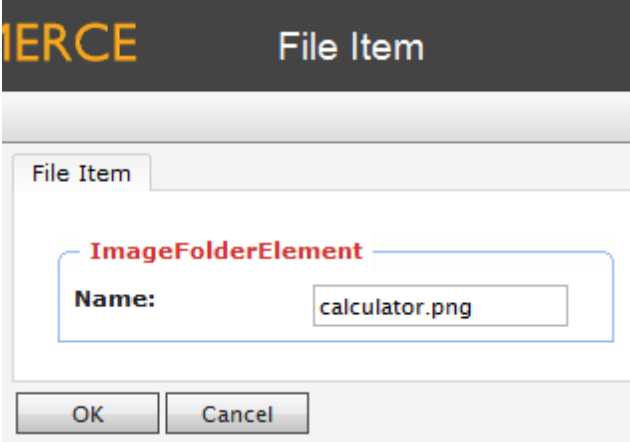
Folder and Asset names can be edited by clicking on the **Edit** icon next to the **Name**.



This brings you to the **Folder Item** page, allowing you to edit the **Name**.



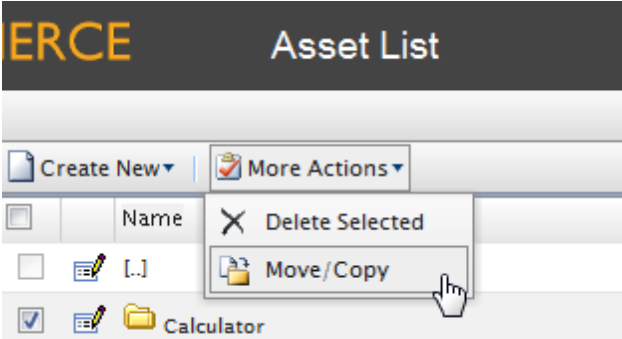
If you are editing an Asset such as an image, the **File Item** page appears, allowing you to edit the name as well.



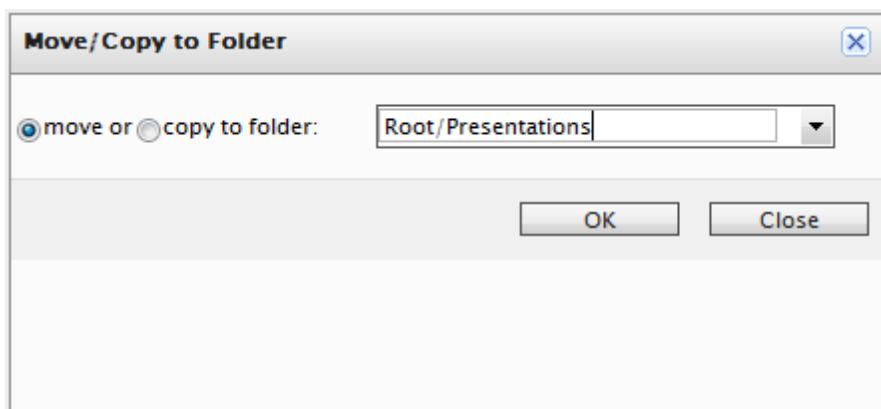
Copying/Moving and Deleting Folders and Assets

Users can also copy/move and delete Folders and Assets.

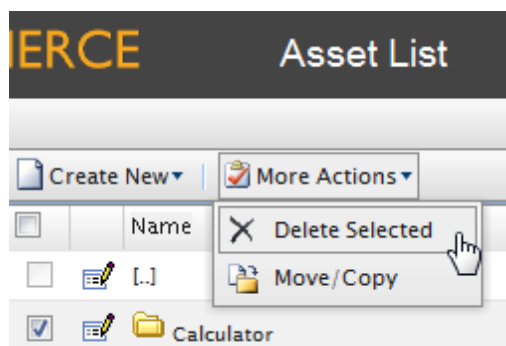
To copy or move an Asset or Folder to another location, place a check mark in the box next to the Folder or Asset name and then click on **More Actions > Move/Copy**.



The **Move/Copy to Folder** pop-up appears. You can select to "move" or "copy to folder." From the drop-down menu, select the destination. Click on **OK** to confirm.



To delete a Folder or Asset, place a check mark in the box and click on **More Actions > Delete Selected**.

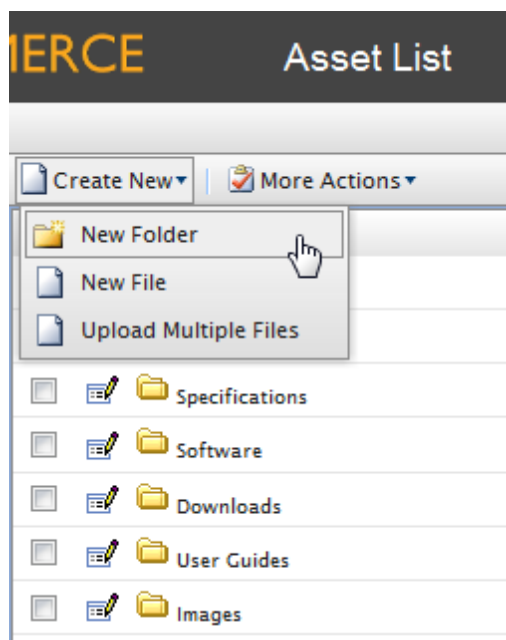


Creating Folders and Uploading Files (Assets)

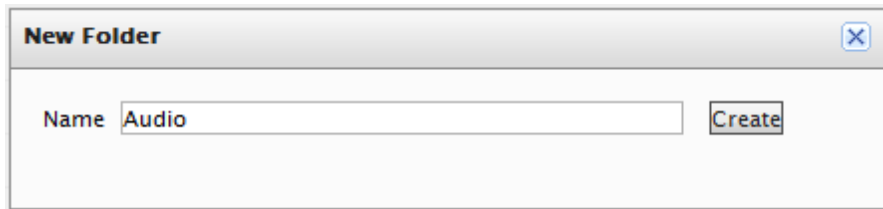
Users can create their own Folders and upload files.

Creating Folders

To create a new Folder, go to the **Asset List** by clicking **Asset Management > Root** (or any Folder underneath Root). Then click on **Create New > New Folder**.

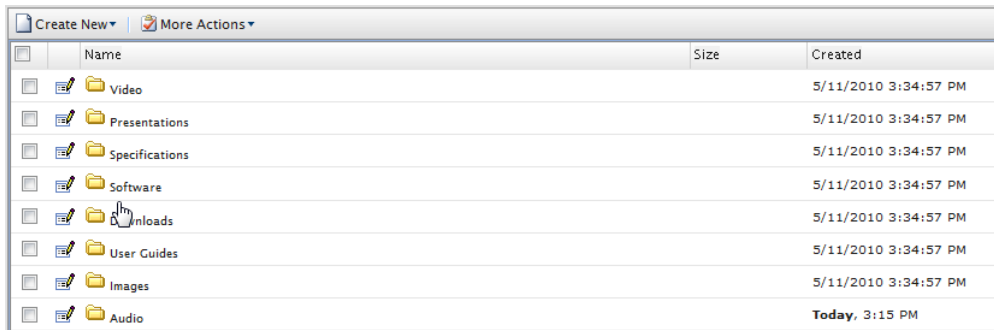


Enter in a name for the Folder and click **Create**.



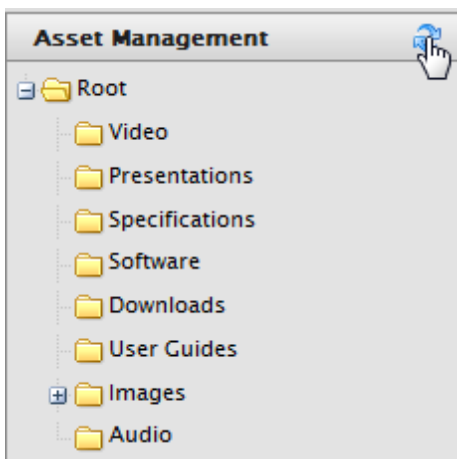
A dialog box titled "New Folder" with a close button (X) in the top right corner. It contains a text input field labeled "Name" with the word "Audio" entered, and a "Create" button to its right.

The Folder will be created in whichever folder you are currently in. In this example, the Folder "Audio" was created underneath **Root**.



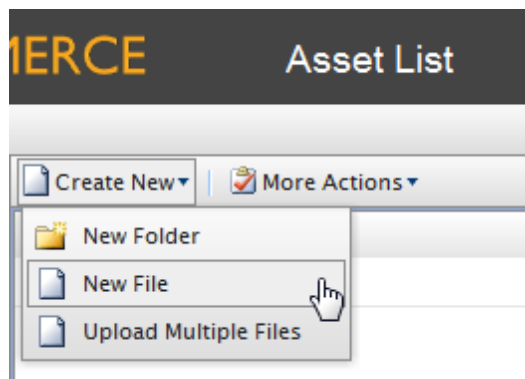
Create New ▾		More Actions ▾	
<input type="checkbox"/>	Name	Size	Created
<input type="checkbox"/>	Video		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Presentations		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Specifications		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Software		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Downloads		5/11/2010 3:34:57 PM
<input type="checkbox"/>	User Guides		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Images		5/11/2010 3:34:57 PM
<input type="checkbox"/>	Audio		Today, 3:15 PM

To see the Folder in the left navigation frame, click on the **Refresh** icon and the new Folder "Audio" will appear. You can create additional subfolders underneath Audio (or any other existing Folder).

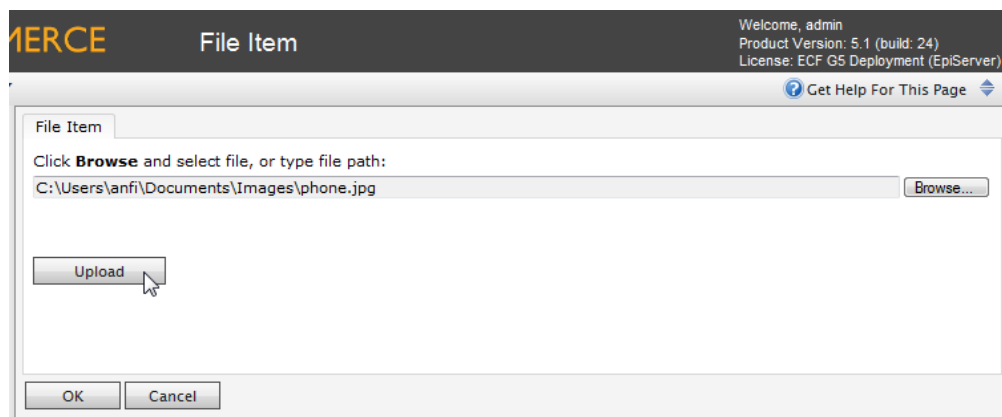


Uploading Individual Files

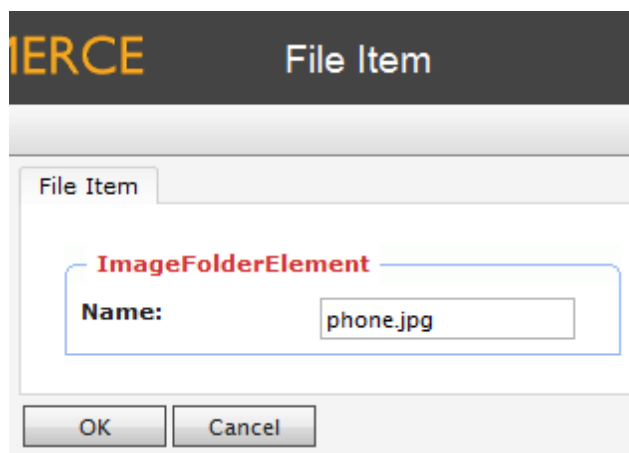
To upload a single File, navigate to the Folder you want to upload the File to and then click on **Create New > New File**.



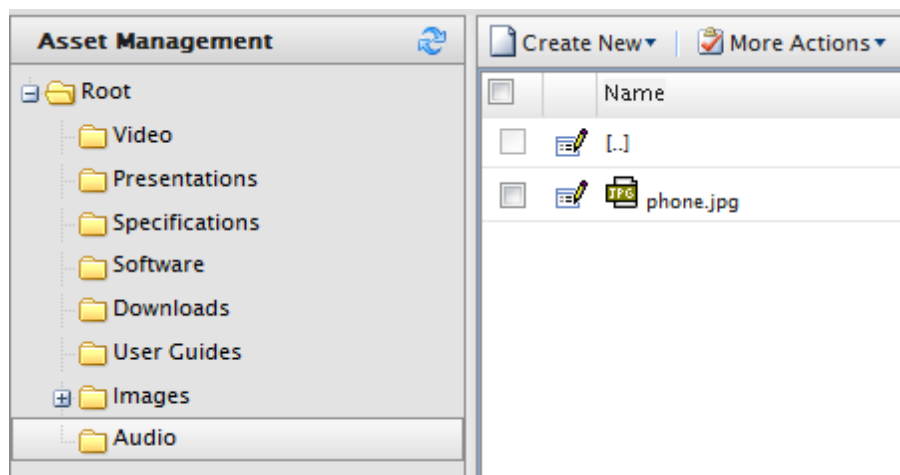
Click on **Browse** or enter in the file path into the field. Once done, click on **Upload**.



A progress bar appears below. Once the upload is complete, the **FolderElement** form appears, allowing you to edit the name of the File, if you wish. Once done, click **OK**.

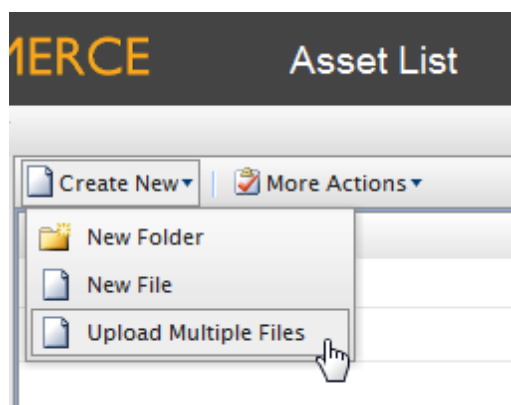


The File is now visible on the **Asset List** of the destination folder.

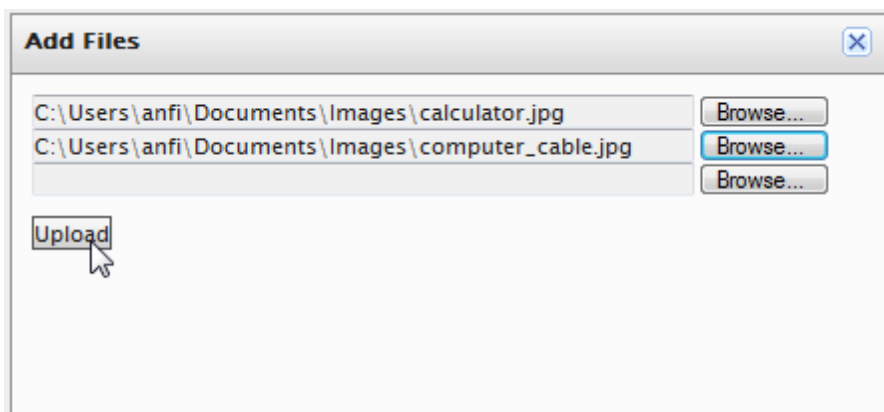


Uploading Multiple Files at One Time

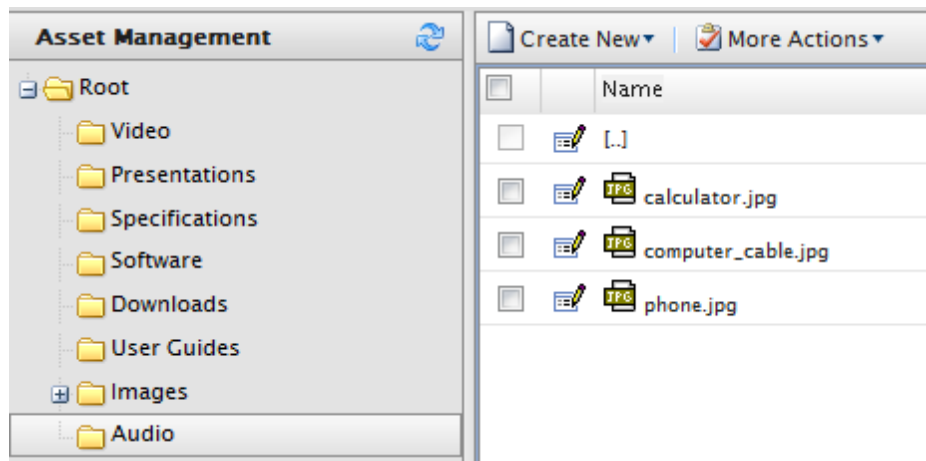
To upload multiple Files to a Folder, click on **Create New > Upload Multiple Files**.



The **Add Files** pop-up window appears. Click on **Browse** to add Files. An additional field will appear below, allowing you to add more. You can upload up to five Files at one time. Once done adding Files, click **Upload**.



A progress bar window will pop-up, showing you the progress of the uploads. Once complete, the Files will appear in the **Asset List**.



Customer Management

The Customer Management system is where you can add individual Organizations, Contacts, and Commerce Manager users.

- Organizations - groups or sub-groups of Contacts.
- Contacts - individuals with a certain set of personalized information (name, address, email, etc.). Contacts can be customers or users with Commerce Manager permissions to manage one or more systems.
- Commerce Manager User - this is a user with an assigned role which provides access to the Commerce Manager site.

Organizations

In the Organizations section, Commerce Manager users can create new Organizations or Organization Units, which are basically groups or sub-groups of assigned Contacts.

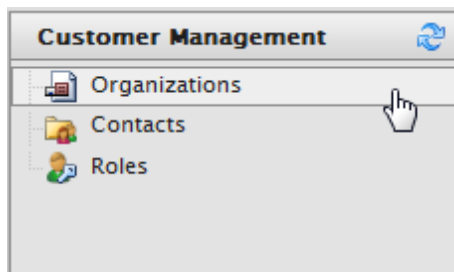
Organizations can be categorized into different types such as Organization or Organization Units (i.e., regional branches, departments) and also business categories such as "Computer and Electronics" or "Clothing and Accessories." Organizations can be structured into a tree structure with sub-units with different levels of permissions assigned to each. For example, you can set up your company as a Parent level organization while your departments such as Sales & Marketing, IT/Development, and Operations as Organization Units. With this scenario, you can allow users in each departments to have access to only relevant systems, screens and functionality within Commerce Manager.

The Organizations section also comes with a new customizable filtering feature to display Organizations and sub-units based on any of their attributes such as Name, Organization Types, Business Categories, etc.

Browsing Organizations

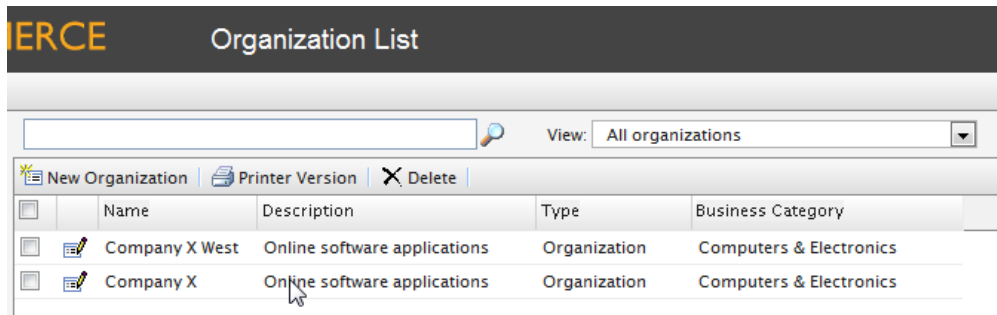
Organizations are one of the major function areas of the Customer Management system. You can browse and view existing Organizations.

To browse Organizations, go to **Customer Management > Organization** on the left navigation frame.

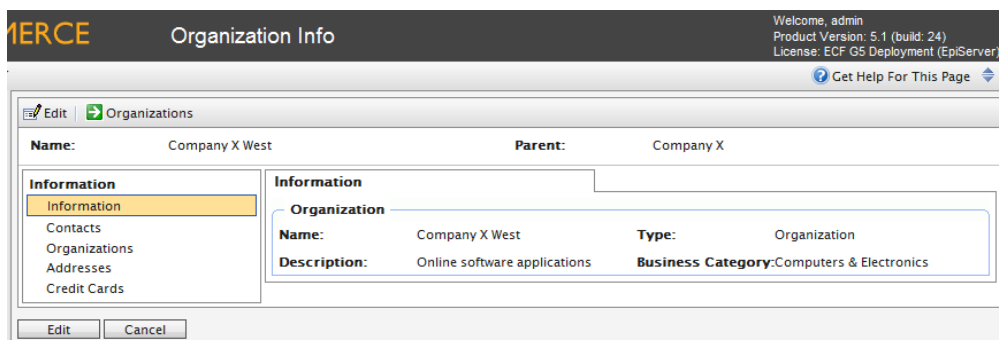


This will open the **Organization List** page.

Viewing Organization Details

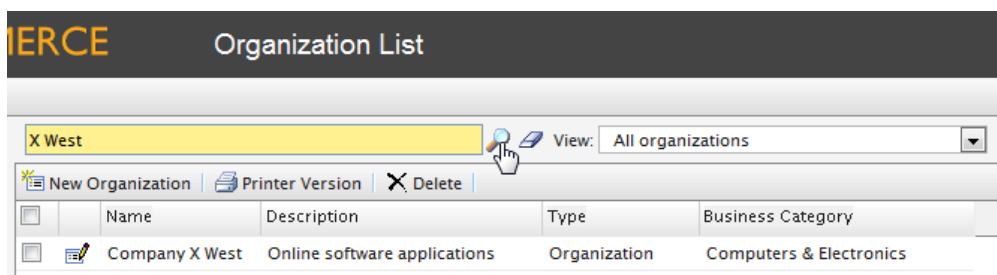


You can click through the name of the Organization to view more details about it.



Searching for Organizations

You can also use the search field on the **Organization List** to find specific Organizations by name. To conduct a search, enter in your search terms and click on the **Search** button (magnifying glass).



To conduct a new search, click on the **Reset** button (eraser) to reset the form and enter your new search terms.

Printing a List of Organizations

If you want to generate a printer-friendly list of Organizations, click on **Printer Version**. A new window will pop-up and render a simple table suitable for printing. Click on the **Print** button on the upper right corner of the page.

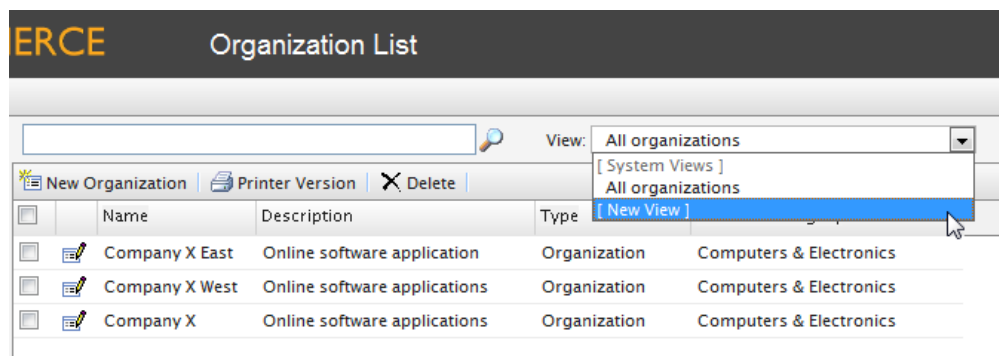
Organization

Name	Description	Type	Business Category
Company X East	Online software application	Organization	Computers & Electronics
Company X West	Online software applications	Organization	Computers & Electronics
Company X	Online software applications	Organization	Computers & Electronics

Creating or Customizing Views for Browsing Organizations

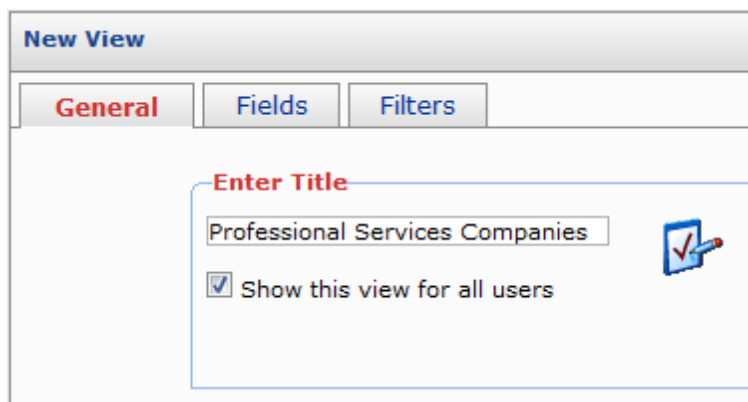
As an **Organization List** gets longer, users can create and customize views to filter the list.

To create a new view, click on the **View** drop-down menu and select "New View."



A pop-up form appears above the **Organization List**. This form gives users the ability to customize which columns appear and apply a variety of filters.

The default tab is **General**. Enter in a **Title** for the custom View. Click the check-box **Show this view for all users**, if you want other users to see this custom View.



New View

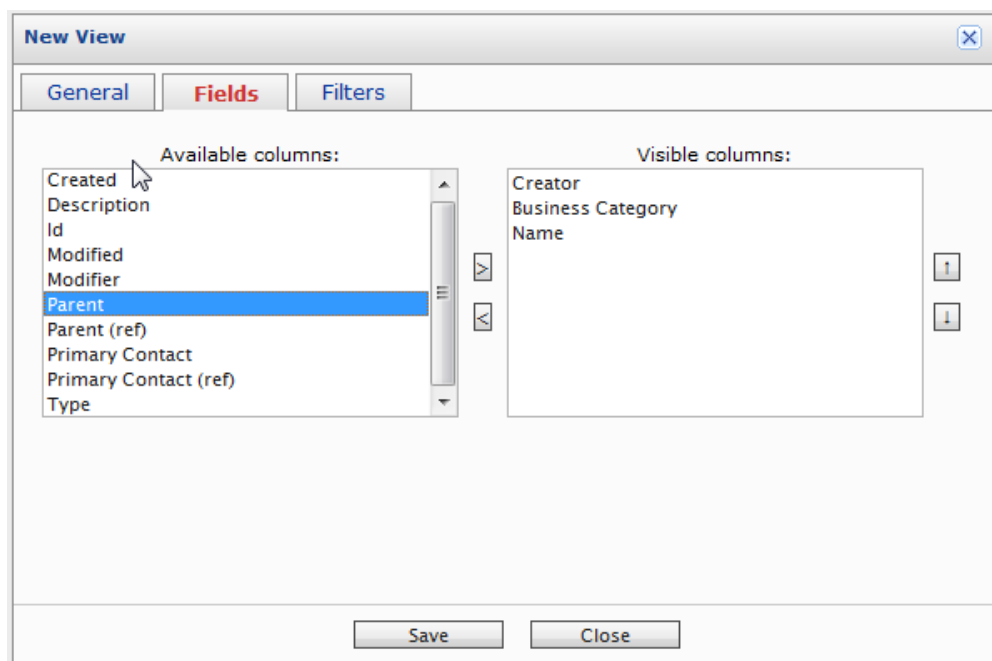
General Fields Filters

Enter Title

Professional Services Companies

☒ Show this view for all users

Click on the **Fields** tab to select which columns you want to appear in the custom View. Select the columns you want to have appear by clicking and highlighting the column name and moving it over to the **Visible columns** list by clicking on the **Right Arrow** icon.



New View

General **Fields** Filters

Available columns:

- Created
- Description
- Id
- Modified
- Modifier
- Parent**
- Parent (ref)
- Primary Contact
- Primary Contact (ref)
- Type

Visible columns:

- Creator
- Business Category
- Name

Save Close

To deselect a column, click and highlight a column name from the **Visible columns** list and then click on the **Left Arrow** icon.

To change the ordering of the **Visible columns** list, click and highlight a column name and click on the **Up and Down Arrow** icons on the right of the list to reposition the column.

Click on the **Filters** tab to set the View filters. Users are given precise controls over filters for setting up rules for their custom View. Clicking on the + icon allows you add an additional filter.

The 'New View' dialog box has three tabs: General, Fields, and Filters. The Filters tab is active, showing a filter chain. The first filter is 'Business Category' equals 'Arts & Entertainment'. Below it, an 'Or' condition is being added. A dropdown menu is open, showing a list of fields: Please choose, Please choose, And, Or, Business Category, Creator, Description, Id, Modified, Name (highlighted), Parent, Parent (Reference), Primary Contact, Primary Contact (Reference), and Type. At the bottom of the dialog are 'Save' and 'Close' buttons.

Click on **Save** to save the settings and return to the **Organization List** screen.

To edit an existing View or a View you just created, select the View from the drop-down menu and click on the **Edit** icon next to it. The **View Editing** form pops up and you are able to edit all properties.

The 'Organization List' screen has a header with 'ERCE' and 'Organization List'. Below the header is a search bar and a 'View' dropdown menu set to 'Professional Services Companies'. To the right of the dropdown are icons for 'Edit' and 'Delete'. Below the search bar are links for 'New Organization', 'Printer Version', and 'Delete'. A table is displayed with columns: 'Creator', 'Business Category', and 'Name'. The table is currently empty.

To delete a custom View, click on the **X** icon next to the **Edit** icon.

There are a multitude of options available for customization, but here are some examples to get you started.

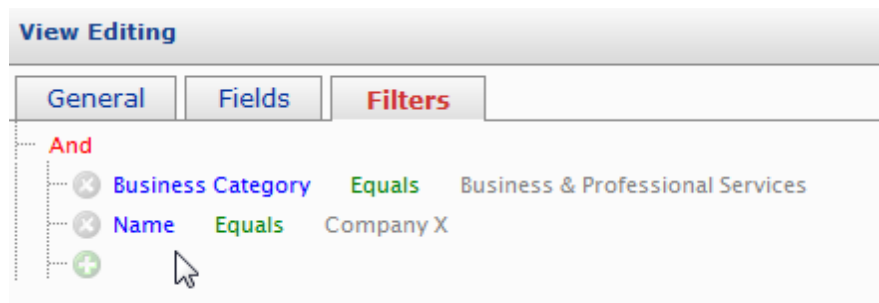
Example View Filter Setups

The examples here will start off with the following list of sample Organizations, Organization Units, and Divisional Units:

	Name	Description	Type	Business Category
	Company X East	Online software application	Organization Unit	Computers & Electronics
	Company X West	Online software applications	Organization Unit	Computers & Electronics
	Company X IT W...	Online software application IT s...	Divisional Unit	Computers & Electronics
	Company X	Online software applications	Organization	Computers & Electronics

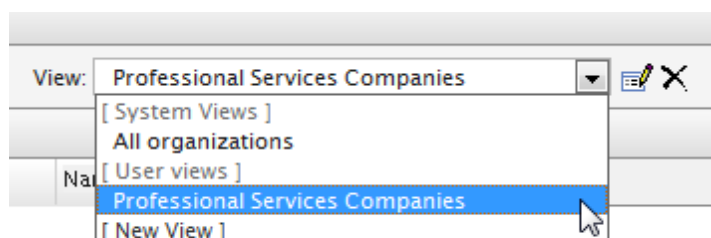
Example 1: Creating a View to Only Show Organizations that Match a Business Category and Organization Name

1. In this example, we will create a filter condition that display Organizations with a Business Category that equals "Business & Professional Services" and an Organization Name that equals "Company X."
2. Click on the **+** icon and from the drop-down select "Business Category." Two fields, which default to "Equals" and "Arts & Entertainment," automatically appear. Click on "Equals" and a drop-down appears. Keep the field as "Equals." Click the field to the right of it and select a "Business Category" name (such as "Business and Professional Services").
3. Since we want to add another filter so that the Organization not only matches this "Business Category," but also a specified name, click on the following **+** icon and then on the drop-down select "Name."
4. In the next field, select "Equals" and then on the field that says "Text" enter in the name of the Organization (such as "Mediachase").
5. Once done, click **Save** to save the View.

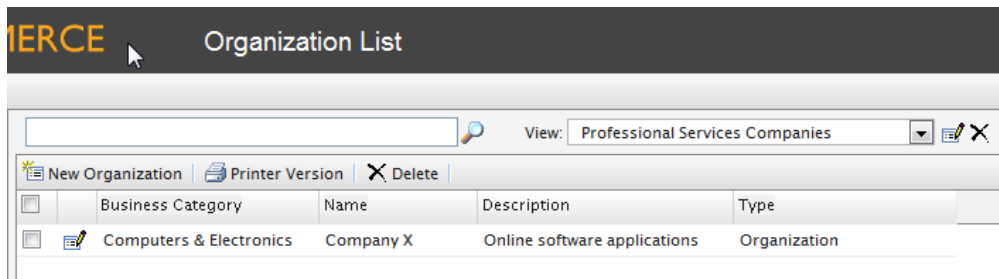


Applying and Editing a View

Once a View is created and saved, it appears in the View drop-down box.

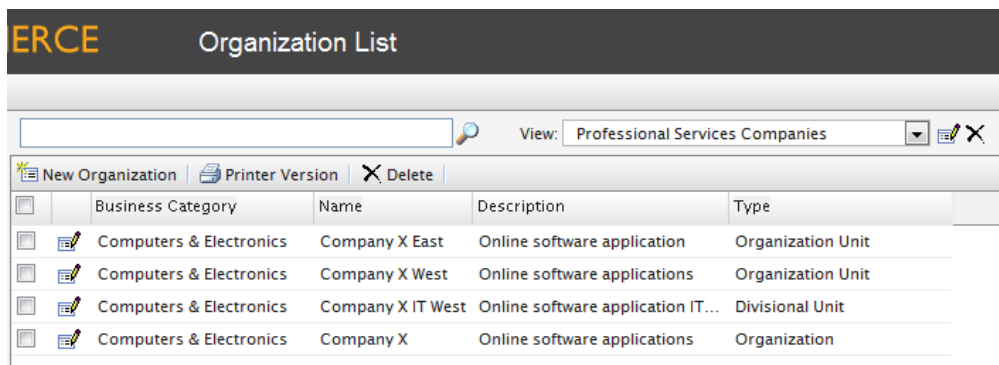
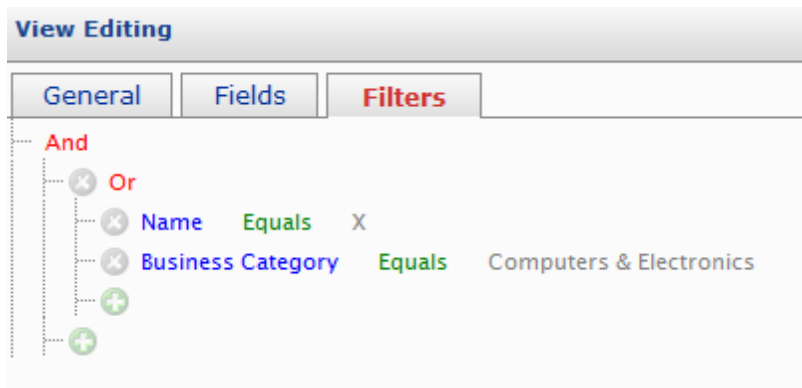


To apply the **View**, select it from the drop-down. Based on the columns and filters you applied for the custom View, your Organization List will reflect those options.



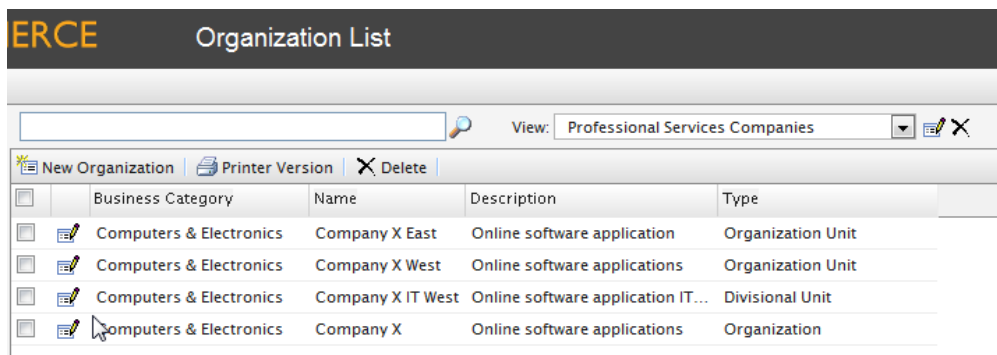
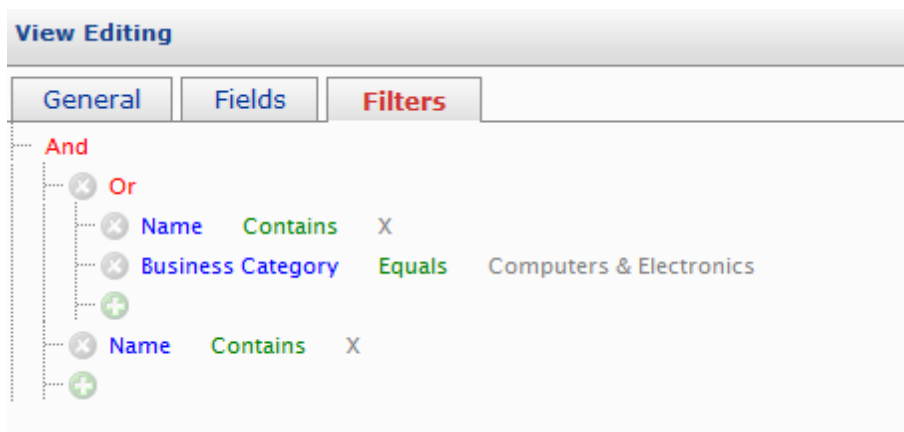
Example 2: Creating a View to Display Companies with Specific Business Category or Organization Name

In this example, we will create a filter condition that display Organizations with a Business Category that equals "Computer & Electronics" or an Organization Name that contains "X."



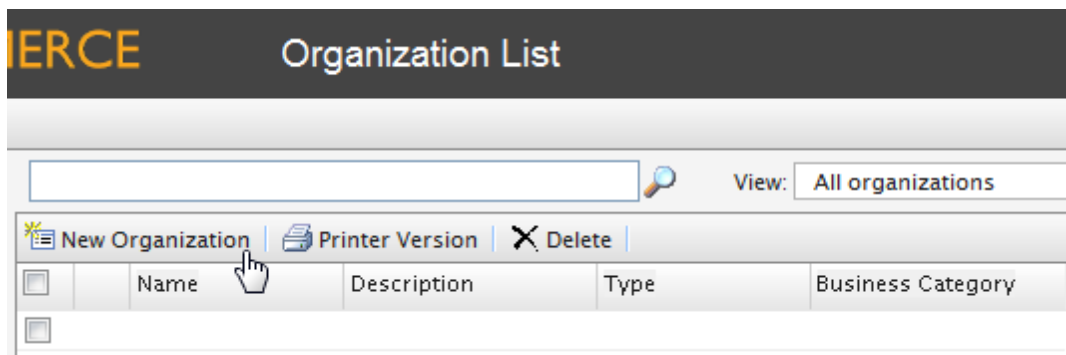
Example 3: Creating a View to Display Companies with Specific Business Category and/or Name

In this example, we will create a filter condition that displays Organizations with a "Business Category" that equals "Computer & Electronics" and/or an Organization Name that contains "X."



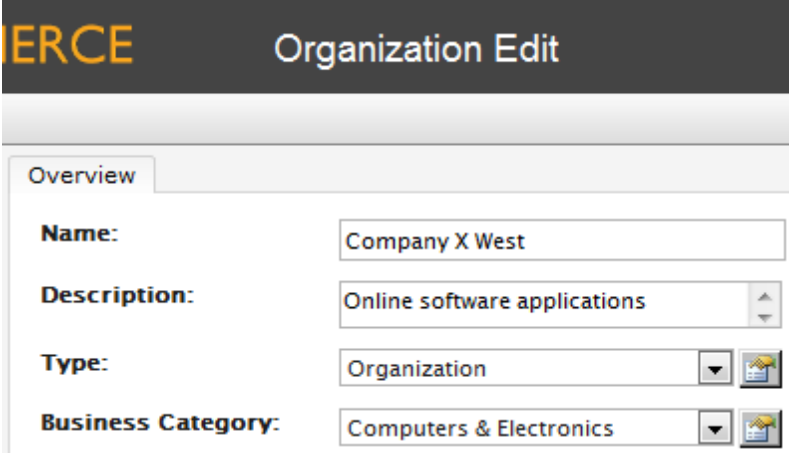
Creating an Organization

To create an Organization, click on **New Organization**.



The **Organization Edit** page appears. The only required field is **Name**.

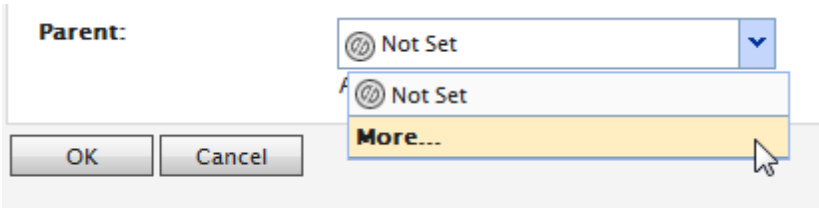
1. Enter in a **Name**, which can have spaces and special characters (just like a Friendly Name).
2. Enter in a brief **Description** of the Organization.
3. Select a **Type** using the drop-down menu.
4. Select a **Business Category** from the drop-down menu.



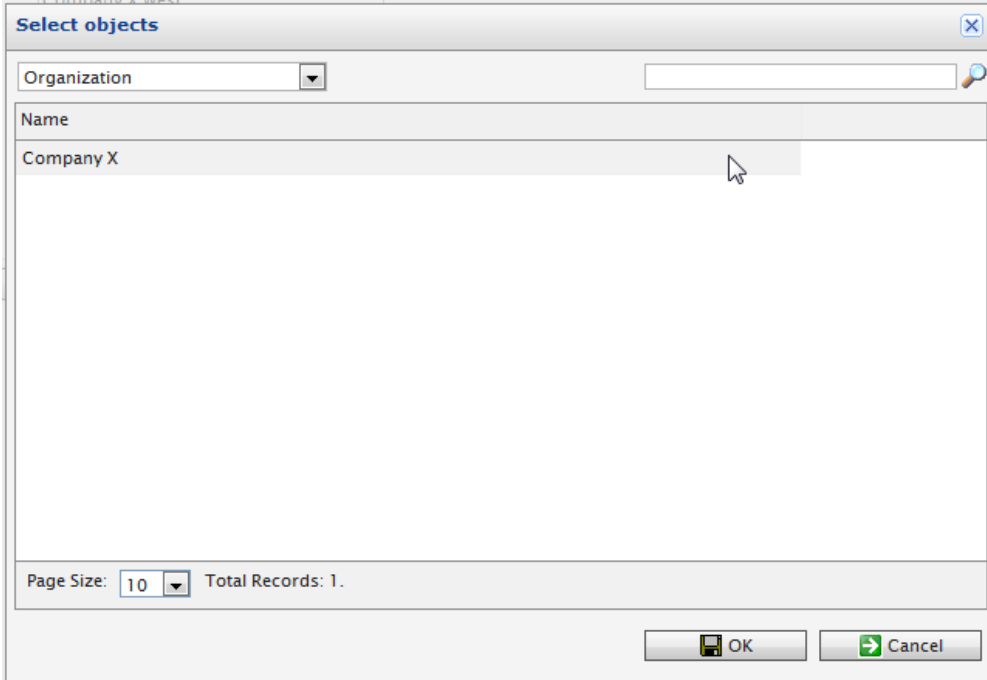
You can set the Organization as a "child" or Organizational Unit of a **Parent** company. For example, if your company or Organization has Divisional Units or subsidiaries, then you can attach this Organization to a Parent company listed in the drop-down menu.



If you do not see the the Organization listed on the dropdown menu, click on "More..."



A pop-up form appears to show all available Organizations.



Once you have entered all relevant information, click on **OK**. The **Organizational Info View Form** of the Organization appears.

From here, you can view Information about the Organization you just created. Out of the box, you can also see associated **Contracts**, **Organizations**, **Addresses**, and **Credit Cards**. You can further edit the Organization by clicking the **Edit** button. To go back to the Organization List, click on **Organizations** on the menu bar next to **Edit**.

Creating an Organization Unit

An Organizational Unit is a "child" or subsidiary of a Parent organization. Within Commerce Manager, you can assign an Organization as a Parent of another Organization. For example, the Parent company "Company X," and the Organizational Units are "Company X West" and "Company X East."

To create an Organization Unit, either create a **New Organization** or **Edit** an existing one.

1. Enter in a **Name** and **Description**.
2. From the drop-down, select the **Type** as "Organization Unit."
3. Select a **Business Category**.
4. Select a **Parent Organization** from the drop-down menu. Selecting a Parent Organization will designate this Organization as a unit (or in other words, a division, sub-organization, subsidiary, etc.)
5. Click **OK** to save the changes.

You will see in the **Organization Info View** form that the Organization is now a child or Organization Unit of the Parent Organization you selected.

Organization Info

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Get Help For This Page

Edit Organizations

Name: Company X North **Parent:** Company X

Information

Organization

Name: Company X North **Type:** Organization Unit
Description: Online software applications **Business Category:** Business & Professional Services

Edit Cancel

Creating an Organizational Hierarchy

You can create Organization Hierarchies by assigning a Parent Organization to a "child" Organization and then another Organization to the child. Permissions can be set to determine which users can view certain Organizations in the hierarchy.

Create an Organization Unit by assigning a **Parent** with a child Organization. For example, "Company X" is the Parent Organization and "Company X West" is the Organization Unit.

Assign another Organization with the child Organization ("Company X West"). Click **OK**.

Organization Edit

Overview

Name: Company X West
Description: Online software applications
Type: Organization Unit
Business Category: Computers & Electronics
Parent: Company X

OK Cancel

Not Set
Company X
More...

In the **Organization Info** page, the Organization becomes the child to the Organization Unit you selected.

Repeat the steps above to create further subunits of the **Parent** Organization.

Creating and Editing Dictionary Entries

By default, when creating or editing an Organization, there is a default list of **Types** and **Business Categories** available to the user. More options can be created by editing the **Dictionary** within the **Organization Edit** page. (Dictionaries are related to Business Foundation and can be extended by the user.)

To edit the Dictionary, open the **Organization Edit** page by creating a new Organization or editing an existing one. Click on the **Dictionary** icon next to the **Type** or **Business Category** drop-down button.

The new window appears allowing you to edit the existing **Dictionary** of either **Business Category** or **Type**. To add a new item to the Dictionary, click on **New Item**.

Enum Info			New Item	Close
System Name: OrganizationType		Friendly Name: OrganizationType	Type: Single Value	
Nº	Item Value	Display Value		
1	Organization	Organization		
2	Organization Unit	Organization Unit		

1. Select the order of the item from the drop-down on the left.
2. Enter in a name of the item on the field next to the drop-down.
3. Click the **Save** icon to save the dictionary item or click **Close** to go back to the Organization Edit page.

Enum Info			New Item	Close
System Name: OrganizationType		Friendly Name: OrganizationType	Type: Single Value	
Nº	Item Value	Display Value		
1	Organization	Organization		
2	Organization Unit	Organization Unit		
3	Divisional Unit	Divisional Unit		

The **Dictionary** item is now available in the **Type** or **Business Category** drop-down.

Type: [No value]
Business Category: [No value]
Parent: Divisional Unit
 Parent Organization

Contacts

Contacts are individuals with a certain set of personalized information (name, address, email, etc.).

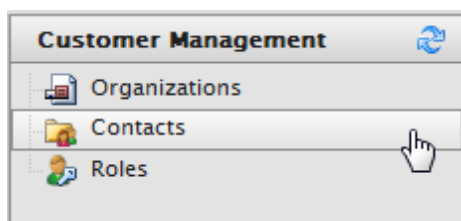
- **Contacts with Accounts** - a customer who registers on the public site. If this customer chooses, he/she can login to his/her Account from the public site and access his/her order history and other personalized information. He/she cannot access the Commerce Manager.
- **Contacts with User Permissions** - someone internal to your team who has varying levels of access to the systems within Commerce Manager

Contacts consisting of users who will be accessing the Commerce Manager can be assigned Roles based on varying permissions. For example, a user with the "Cms Admins" role will have full access to only the Content Management system. In addition, notes regarding the Contact's registration source can be recorded.

The Contact section also comes with a new customizable filtering feature to display contacts based on any of their attributes such as Name, Last Order Date and Customer Group.

Browsing Contacts

To browse Contacts, go to **Customer Management > Contacts**.



Viewing Detailed Contact Information

The **Contact List** page shows a list of existing Contacts.

ERCE Contact List				
<input type="text"/> View: All contacts				
New Contact Printer Version Delete Selected				
<input type="checkbox"/>	Full Name	First Name	Last Name	Middle Name
<input type="checkbox"/>	Mats Hellström	Mats	Hellström	
<input type="checkbox"/>	admin	admin		
<input type="checkbox"/>	EPiServer Commerce Visitor	Visitor	Commerce	
<input type="checkbox"/>	admin2	admin2	admin2	
<input type="checkbox"/>	EPiServer Commerce Admin	Commerce Admin	EPiServer	
<input type="checkbox"/>	Per Rask	Per	Rask	
<input type="checkbox"/>	ossian berggren	ossian	berggren	
<input type="checkbox"/>	Lotta	Lotta	Andersson	
<input type="checkbox"/>	Peter Sunna	Peter	Sunna	

You can click through the name an existing Contact to view more information.

ERCE
Contact Info

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[Get Help For This Page](#)

[Edit](#) | [Delete](#) | [Contacts](#)

Full Name: EPiServer Commerce Visitor Parent Organization:

Information
[Information](#)
[Addresses](#)
[Credit Cards](#)
Security
[Roles](#)
Orders
[Order History](#)
Shopping Lists
[Wish Lists](#)
[Shopping Carts](#)

Contact

Full Name: EPiServer Commerce Visitor Customer Group:
First Name: Visitor Preferred Currency: [No value]
Middle Name: Preferred Language: [No value]
Last Name: Commerce Registration Source:
Parent Organization: Last Order Date:

Account

[Edit Account](#) | [Change Password](#) | [Remove Account](#)
User Name: commercevisitor Last Activity: 5/17/2010 8:36:04 AM
Description: Last Lockout: none
Email: visitor@ep.se Last Login: 5/17/2010 8:35:49 AM
Last Password Changed: 5/11/2010 1:42:25 PM

[Edit](#) [Cancel](#)

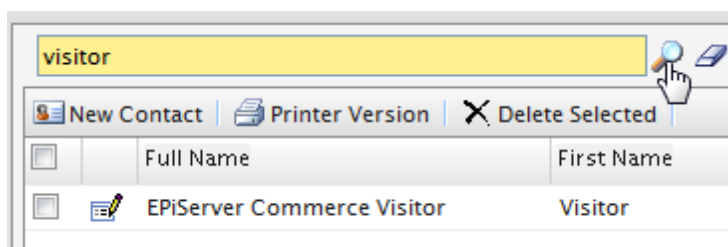
From within the **Contact Info** form, you can view other recorded information about the Contact. For example, you can view **Addresses** and **Order History** related to this Contact.



More objects or metadata can be added to the default View Form via Business Foundation.

Searching for Contacts

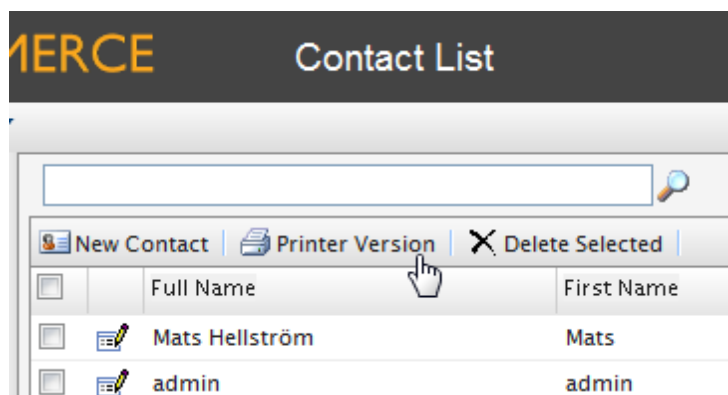
On the **Contact Info** page, you can use the search form above to search for a particular Contact using key terms. Conduct the search by clicking on the **Search** icon (magnifying glass). Contacts that match the search terms will appear on the list.



To clear the search and revert back to show all Contacts, click on the **Reset** icon (eraser) next to the Search icon.

Generating a Printer Friendly List of Contacts

To generate a printer friendly layout of the **Contact List**, click on **Printer** Version from the menu bar on the **Contact List** page.



A new browser window opens showing a printer-friendly version of the Contact List. Click on **Print** on the far right corner of the browser window.

Contact

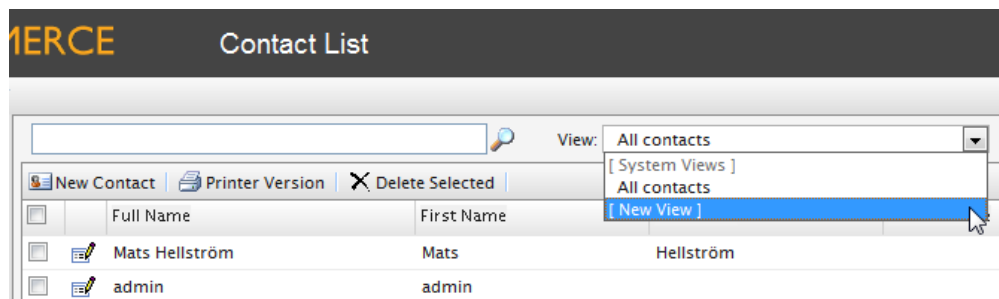
Full Name	First Name	Last Name	Middle Name	Last Order Date	Customer Group
Mats Hellström	Mats	Hellström		5/28/2010 8:29:59 AM	
admin	admin			5/31/2010 8:18:08 AM	
EPiServer Commerce Visitor	Visitor	Commerce			
admin2	admin2	admin2			
EPiServer Commerce Admin	Commerce Admin	EPiServer			
Per Rask	Per	Rask			
ossian berggren	ossian	berggren			
Lotta	Lotta	Andersson			
Peter Sunna	Peter	Sunna		5/20/2010 1:17:13 PM	

Creating or Customizing Views for Browsing Contacts

Like Organizations, users can create or customize **Views** when browsing objects.

Creating a New View

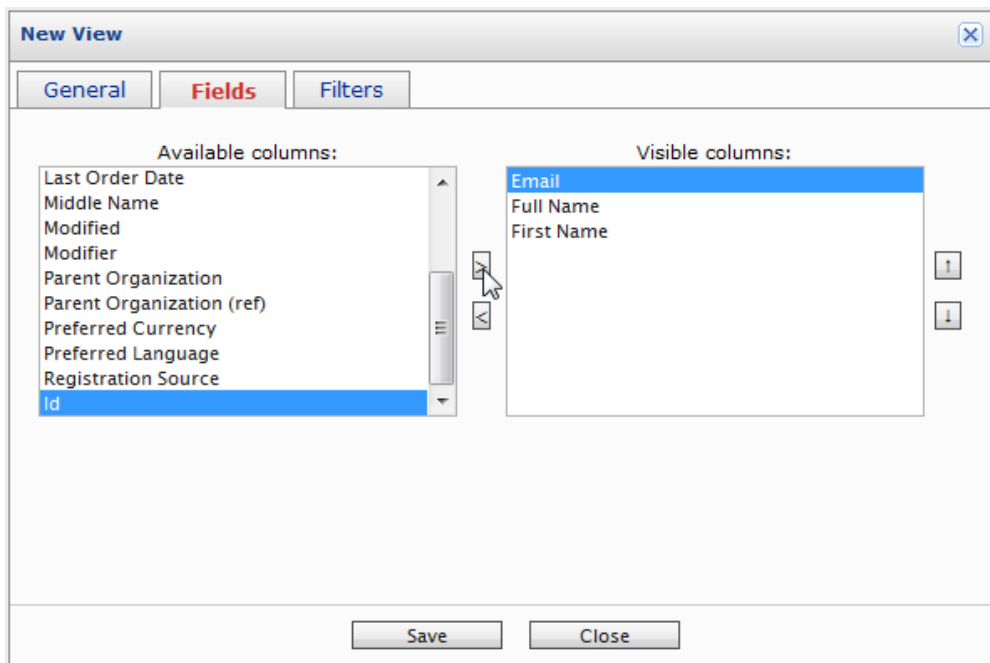
On the **Contact List** page, click on the **View** drop-down menu and select **New View**.



A pop-up appears, very similar to the one found in Organizations. This form gives users the ability to customize which columns appear and apply a variety of filters.

The default tab is **General**. Enter in a **Title** for the custom **View**. Check the box **Show this view for all users** if you want other users to see this custom View.

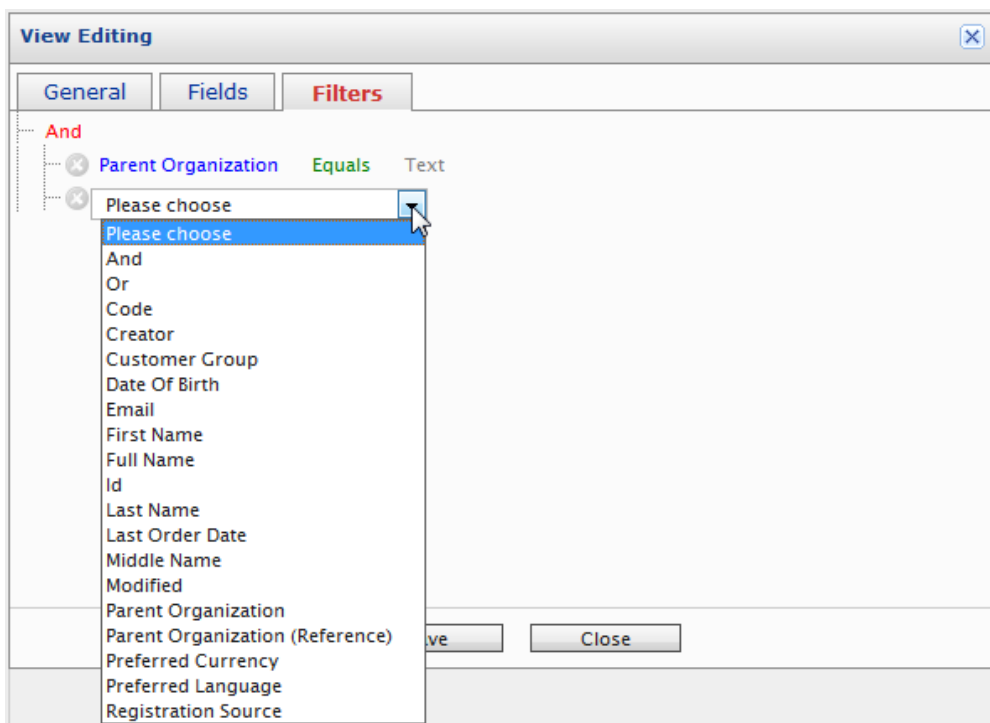
Click on the **Fields** tab to select which columns you want to appear in the custom View. Select the columns you want to have appear by clicking and highlighting the column name and moving it over to the **Visible columns** list by clicking on the **Right Arrow** icon.



To deselect a column, click and highlight a column name from the **Visible columns** list and then click on the **Left Arrow** icon.

To change the ordering of the **Visible column** list, click and highlight a column name and click on the **Up and Down Arrows** on the right of the list to reposition the column.

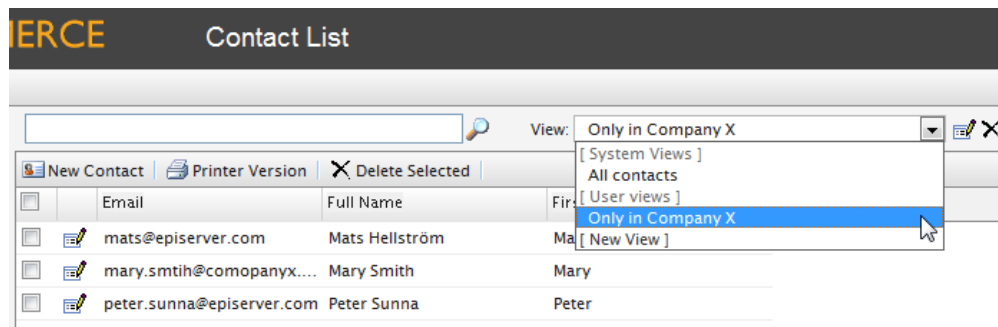
Click on the **Filters** tab to set the view filters. Users are given precise controls over filters for setting up rules for their custom View. Clicking on the **+** icon allows you add an additional filter.



There are a multitude of options available for customization.

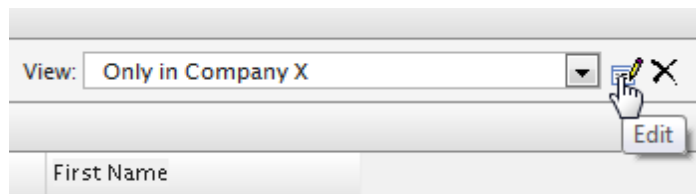
Applying and Editing a View

Once a **View** is created and saved, it appears in the **View** drop-down box.



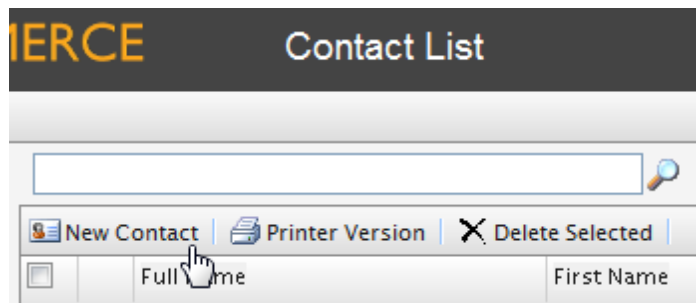
To apply the **View**, select it from the drop-down. Based on the columns and filters you applied for the custom View, your **Contact List** will reflect those options.

To edit an existing View or a View you just created, select the **View** from the drop-down menu and click on the **Edit** icon next to it. The **View Editing** form pops up and you are able to edit all properties.



Creating a Contact

To create a new Contact, from the **Contact List** page, click on **New Contact**.



The **Contact Edit** page appears where you can enter all relevant information about the contact. The only required fields to complete are **Full Name**, **First Name**, **Last Name**, and **Email**. The rest of the fields are optional but are recommended.

1. Select a **Parent Organization** from the drop-down menu to associate the Contact with a single Parent Organization.
2. Assign the Contact to a **Customer Group**. More Customer Groups can be added by editing the Customer Group Dictionaries. Customer Groups become useful when setting specific permissions and targeted Marketing Campaigns.

3. Select a **Preferred Currency** for the contact. If the Contact is in France, you may want to associate the Euro currency. Available currency options are based on settings in **Administration > System Settings > Dictionaries > Currencies**.
4. Select a **Preferred Language** to associate with the Contact. Languages are populated based on the languages set under **Administration > System Settings > Dictionaries > Languages**.
5. The **Registration Source** field is a text field for entering in notes about the Contact. For instance, you may want to reference which website the Contact is currently registered under.



The **Registration Source** field is automatically filled when a user creates a new Account from the public website.

ERCE Contact Edit

Overview

Full Name: Mary Smith

First Name: Mary

Middle Name:

Last Name: Smith

Email: mary.smtih@comopanyx.com
Contact Email Description

Parent Organization: Company X
Contact Organization

Customer Group: Customer

Preferred Currency: US dollar

Preferred Language: English (United States)

Registration Source: companyx

OK Cancel

Click **OK** to save the Contact. The **Contact Info View Form**, where you can enter in additional information about the Contact as well as go back and edit the Contact again.



The screenshot belows shows the default layout of the **Contact Info** form. This can be customized using Business Foundation.

ERCE Contact Info

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Get Help For This Page

Edit Delete Contacts

Full Name: Mary Smith Parent Organization: Company X

Information

Information

Addresses
Credit Cards

Orders

Order History

Shopping Lists

Wish Lists
Shopping Carts

Contact

Full Name: Mary Smith Customer Group: Customer
First Name: Mary Preferred Currency: USD
Middle Name: Smith Preferred Language: en-US
Last Name: Smith Registration Source: companyx
Parent Organization: Company X Last Order Date:

Account

Account not found: Create account

Edit Cancel

To go back to the Contact List, click **Cancel** or the **Contacts** button next to the **Right Arrow** icon.

Creating an Account

An Account can be created with a Contact. Once an Account has been created, the Contact can be assigned permissions using Roles and access the Commerce Manager.



A customer Account is automatically created for a customer who registers from the front-end public website, allowing them to login and view personalized information.

To create an Account for an existing Contact, click on a Contact name from the **Contact List**. On the **Contact Info** page, click on **Create Account**.

ERCE Contact Info

Welcome, admin
Product Version: 5.1 (build: 24)
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Get Help For This Page

Edit Delete Contacts

Full Name: Mary Smith Parent Organization: Company X

Information

Information

Addresses
Credit Cards

Orders

Order History

Shopping Lists

Wish Lists
Shopping Carts

Contact

Full Name: Mary Smith Customer Group: Customer
First Name: Mary Preferred Currency: USD
Middle Name: Smith Preferred Language: en-US
Last Name: Smith Registration Source: companyx
Parent Organization: Company X Last Order Date:

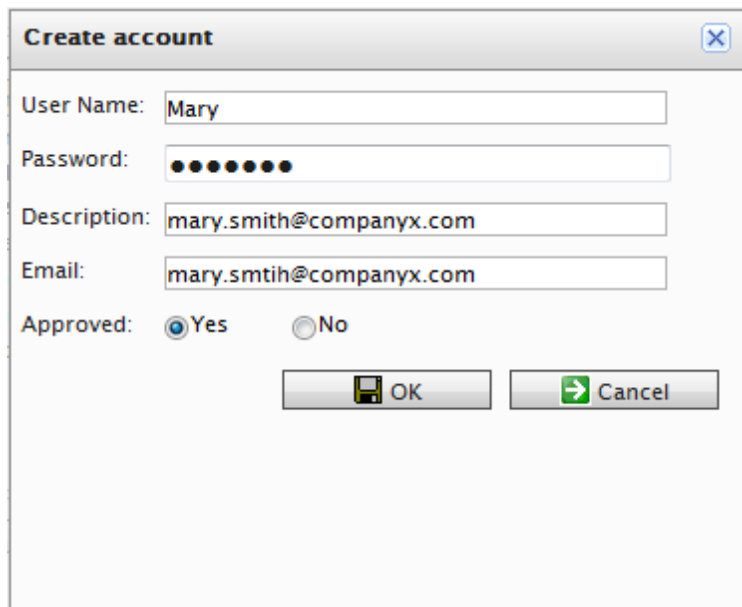
Account

Account not found: Create account

Edit Cancel

A pop-up appears to enter in their user account credentials. A **User Name** and **Password** are required to create the Account.

1. Enter in a **User Name**, which can include spaces and special characters.
2. Enter in a **Password**, which must be four or more characters.
3. Enter in a **Description** and **Email Address**, which are both optional.
4. To enable the account, select "Yes" under **Approved**. Otherwise, select "No" to keep the account inactive and inaccessible by the user.
5. Click **OK** to save the account.



Create account

User Name:

Password:

Description:

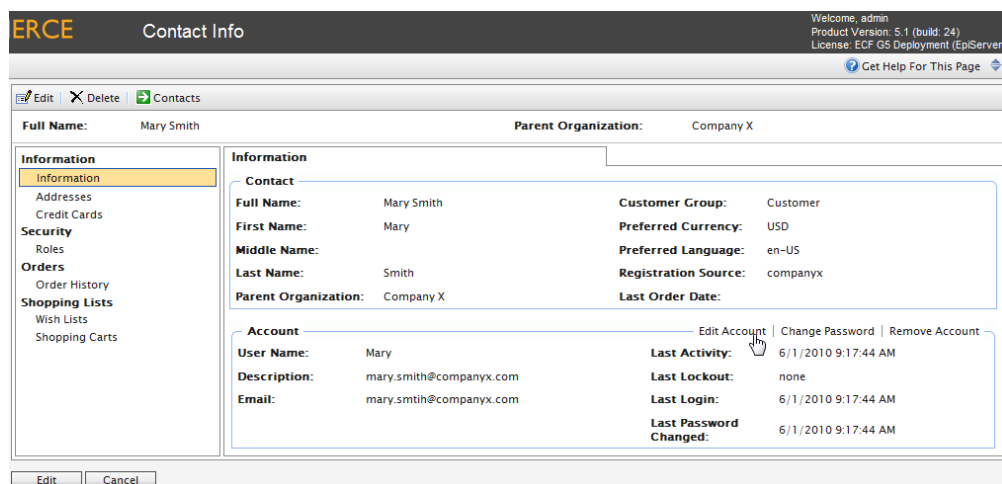
Email:

Approved: ☒ Yes ☐ No

User account information appears under the **Account** section of the **Contact Information** form.

Fields Explained:

- **Last Activity** - last time the user logged in or made any changes to the site
- **Last Lockout** - last time a user was locked out due to too many failed login attempts
- **Last Login** - last time the user logged into his or her account
- **Last Password Changed** - last time the user account password changed



ERCE Contact Info

Welcome, admin
Product Version: 5.1 (build: 24)
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[Get Help For This Page](#)

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

Full Name: Mary Smith **Parent Organization:** Company X

Information	Contact
Information Addresses Credit Cards Security Roles Orders Order History Shopping Lists Wish Lists Shopping Carts	Full Name: Mary Smith First Name: Mary Middle Name: Smith Last Name: Smith Parent Organization: Company X Customer Group: Customer Preferred Currency: USD Preferred Language: en-US Registration Source: companyx Last Order Date: Account User Name: Mary Description: mary.smith@companyx.com Email: mary.smtih@companyx.com Edit Account Change Password Remove Account Last Activity: 6/1/2010 9:17:44 AM Last Lockout: none Last Login: 6/1/2010 9:17:44 AM Last Password Changed: 6/1/2010 9:17:44 AM

Editing an Account, Changing an Account Password, and Removing Accounts

To edit an Account, click on **Edit Account**. The same pop-up will appear. You cannot change the **User Name** unless you remove the Account and recreate the same Account.

To change the password, click on **Change Password**. A password pop-up appears with an editable field that allows you to enter in the new password.

To delete or remote the account, click on **Remove Account**.

Roles and Permissions

In the Roles section, Commerce Manager users can be either granted or restricted access to an entire system or a particular menu item within a system. Each Role is defined by a set of Permissions that can be added or changed based on user selection. Existing Roles can be customized; new Roles can also be created to suit your unique business needs.

Roles control the level of access permissions of each user account in Commerce Manager. Different Roles may be added to user accounts (i.e., store operator or webmaster) so that they can access, edit, or process relevant information.

There are three main categories that determine the different levels of permissions: Admin, Manager, and Schema Manager.

- **Admin Role** - allows users to fully access and administer a particular Commerce Manager system.
- **Manager Role** - allows users to manage (View/Create/Edit/Delete) existing aspects of a particular Commerce Manager system .
- **Schema Manager** - allows users to access only the administrative side of an Commerce Manager system (e.g. setting up Meta Data).

Definitions of Roles

Selecting Roles in the navigation frame opens a **Roles List** page with the default Roles shown below. The Roles List page allows Commerce Manager administrative users to add new or delete these existing Roles.

Here is a listing of some of the Roles followed by a brief high-level description of what a user with this Role can access:

- **Admins** - allows users to fully administer most areas of the Commerce Manager with the exception of Business Foundation and a few other administrative functions
- **Asset Admins** - allows user to fully administer the Asset Management system
- **Asset Managers** - allows user to manage (View/Create/Edit/Delete) but not fully administer the Asset Management system (to fully administer, you need access to the Administration area)
- **Catalog Admins** - allows users to fully administer the Catalog Management system
- **Catalog Managers** - allows users to manage (View/Create/Edit/Delete/Others) Catalogs, Nodes, and Entries within the Catalog Management system
- **Cms Admins** - allows user to fully administer the Content Management system
- **Cms Editors** - allows user to view existing Sites and manage (View/Create/Edit/Delete/Others) Folders/Pages, and Menus
- **Cms Managers** - allows user to manage (View/Create/Edit/Delete/Others) Sites, Folders/Pages, and Menus but not fully administer the Content Management system (to fully administer, you need access to the Administration area)
- **Customer Managers** - allows users to manage (View/Create/Edit/Delete/Others) customers within the Customer Management system as well as various elements in Business Foundation
- **Everyone** - one of the default Roles which is assigned when a customer registers an account from the front-end public site
- **Management Users** - allows users access to the Commerce Manager
- **Marketing Admins** - allows users to fully administer the Marketing system

- **Order Admins** - allows users to fully administer the Order Management system
- **Order Managers** - allows users to manage (View/Create/Edit/Delete/Others) elements within the Order Management system
- **Security Admins** - allows users to manage (View/Create/Edit/Delete) Roles within the Customer Management system
- **Registered** - one of the default Roles which is assigned when you register from an Account from the front-end public site



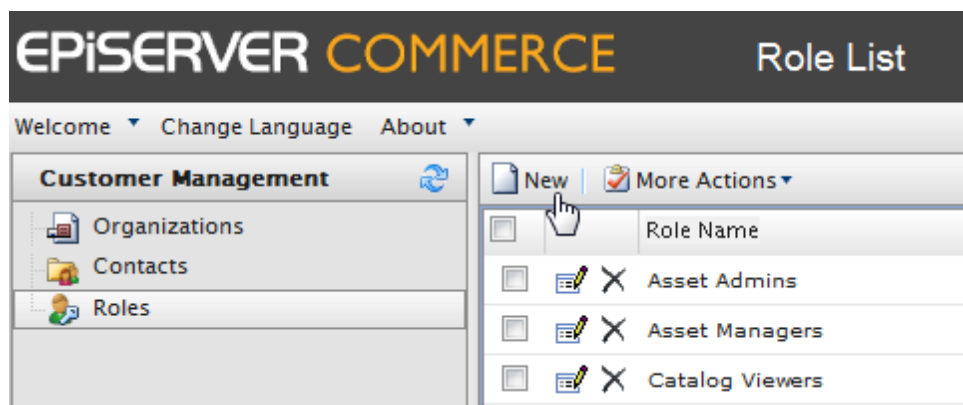
These Roles are only suggestions and you can easily modify these existing roles or consolidate roles. In addition, custom Roles can be created depending on your business needs.

Creating, Editing, and Deleting Roles

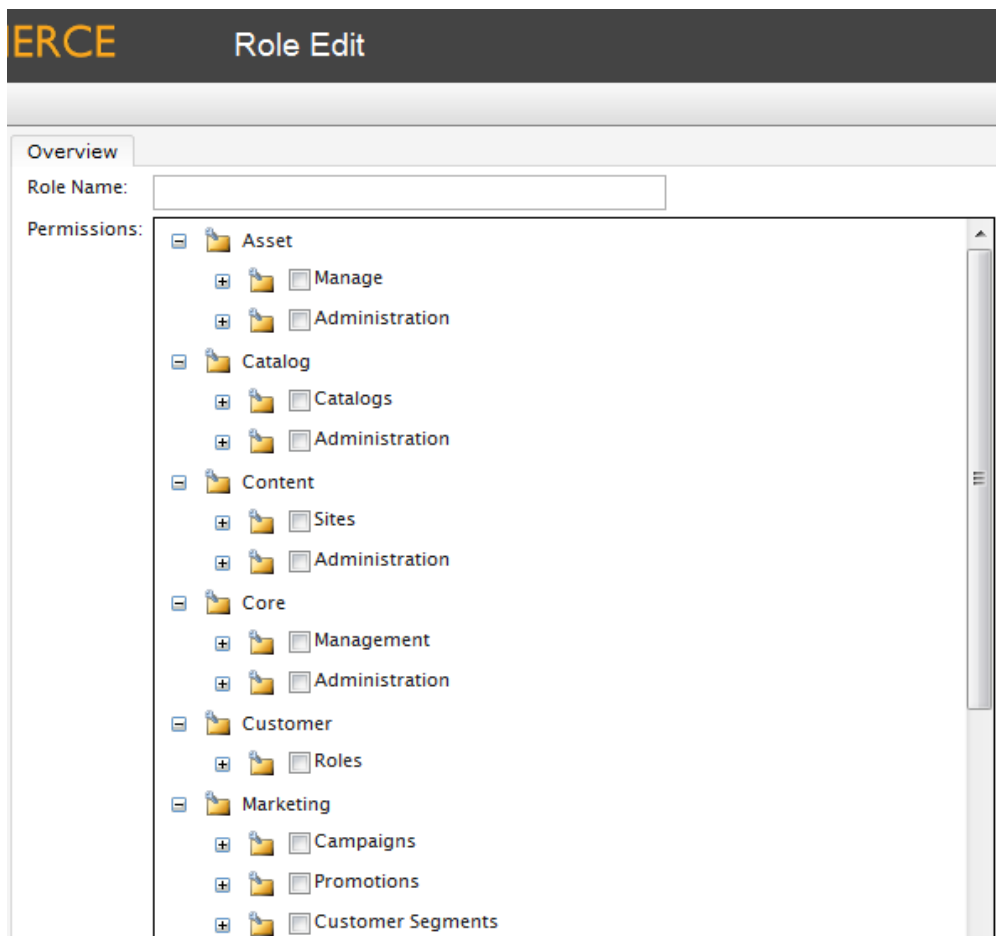
Out of the box, Commerce Manager includes a list of pre-existing Roles that can be assigned to Accounts. Users can also create their own Roles based on a set of Permissions. Roles allow Administrators to restrict users from accessing different systems or folders depending on their needs.

Creating a Role

To create a new Role, go to **Customer Management > Roles** to see the **Role List**.



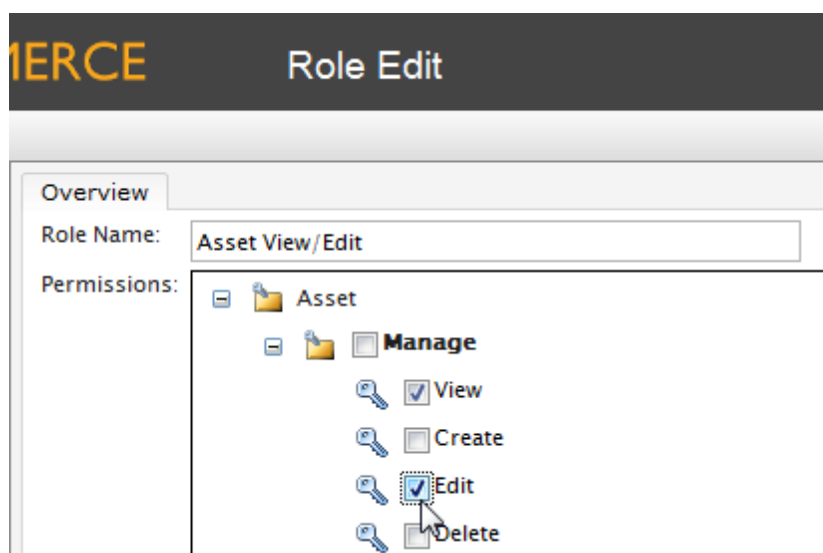
Click on **New** to open up the **Role Edit** page.



There is a wealth of Permissions options Administrators can set for a Role.

Enter in a **Role Name**.

Checkmark the boxes to give Permissions to the Account for this particular function or action. For example, if you want an Account to only **View** and **Edit Assets**, you will need to expand **Assets > Manage** and checkmark **View** and **Edit**.



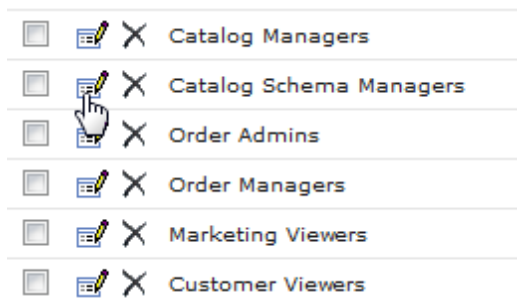
Once done defining the Role, click on **OK**. The new Role will appear on the **Role List**.



Editing Existing Roles

All existing Roles, including the ones included out of the box with Commerce Manager, can be edited and customized. It is also a recommended reference to how each pre-existing Role works.

To edit a Role, click on the **Edit** icon.



The **Role Edit** page appears. You can customize the Permissions settings for the Role. Once done, click **OK**.

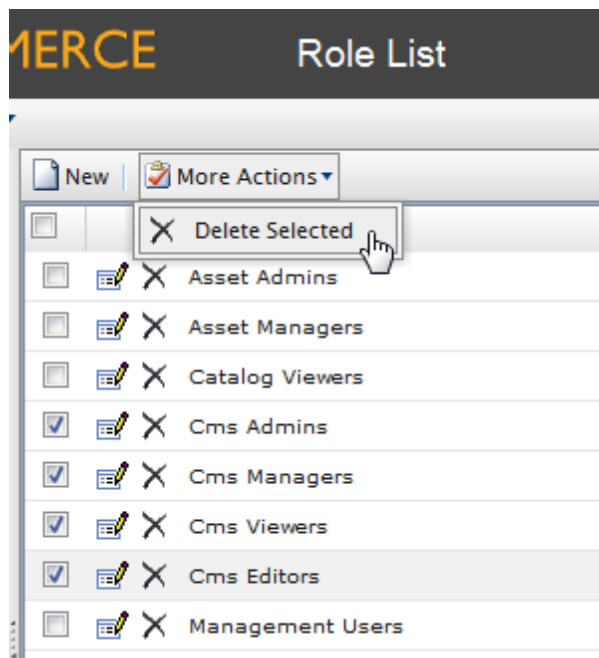
Deleting Roles

To delete any Role on the list, there are two ways:

Click on the **X** button next to the name of the Role to delete one at a time.



To delete multiple Roles, checkmark each box and on the menu bar, click on **More Actions > Delete Selected**. Click **OK** when the pop-up appears.



Assigning Roles to Individual Accounts

Roles are designed to allow and disallow certain functionality and folders to individual accounts. When a Contact logs into his or her account, that Account is bound by the Roles it was assigned.

To assign one or more Roles to an account, go to **Customer Management > Contacts** and click on an existing Contact with an Account.

Under **Security**, click on **Roles**. The **Security** section only appears after an Account was created for the Contact.

The Roles form appear, allowing you to assign Roles to the Account. By default, an Account is already assigned the "Registered" and "Everyone" roles.

The screenshot shows the 'Contact Info' page for a contact named Mary Smith. The 'Parent Organization' is set to 'Company X'. On the left sidebar, the 'Security' section is expanded, and the 'Roles' link is highlighted. The main content area shows a table of roles assigned to the contact.

Role Name	Organization	Inheritance
Registered	none	[Undefined]
Everyone	none	[Undefined]

At the bottom of the roles table, there is a 'Page Size' dropdown set to 20 and a pagination indicator '(2 items) | Page < 1 >'. Below the table are 'Edit' and 'Cancel' buttons.

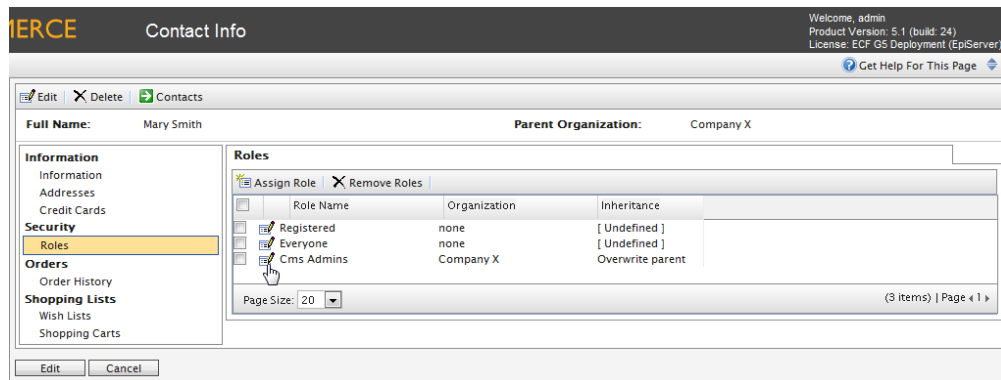
Click on **Assign Role** to assign a new Role to the Account. A pop-up appears allowing you to assign a specific Role from the drop-down menu.

The 'Assign Role' dialog box is shown. It contains three dropdown menus: 'Security Role' (set to 'Cms Admins'), 'Organization' (set to 'Company X'), and 'Inheritance' (set to 'Inherit From Parent'). At the bottom right, there are 'Save' and 'Cancel' buttons. A mouse cursor is pointing at the 'Save' button.

Select a **Security Role** from the drop-down to assign to the Account.

Optionally, you can assign an Organization to the Account, which enables the Inheritance drop-down menu below. If specific permissions are set for an Organization, you can set to "Inherit from Parent" (inherit permissions from the Parent organization) or "Overwrite parent."

Click **Save** to assign the role. Repeat these steps to assign more roles to the Account.



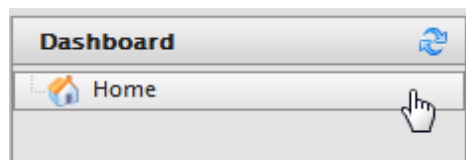
Dashboard

The Dashboard is an aggregated view of a site's status. Typically, the **Dashboard > Home** is the first screen seen that a user sees when he/she logs into Commerce Manager. This is the area that a user can get a quick overall snapshot of his ecommerce site, including notifications and alerts, an overall summary of products, categories, orders, customers, and promotions, sales performance graphs, customizable news and announcements, and a search field for help.

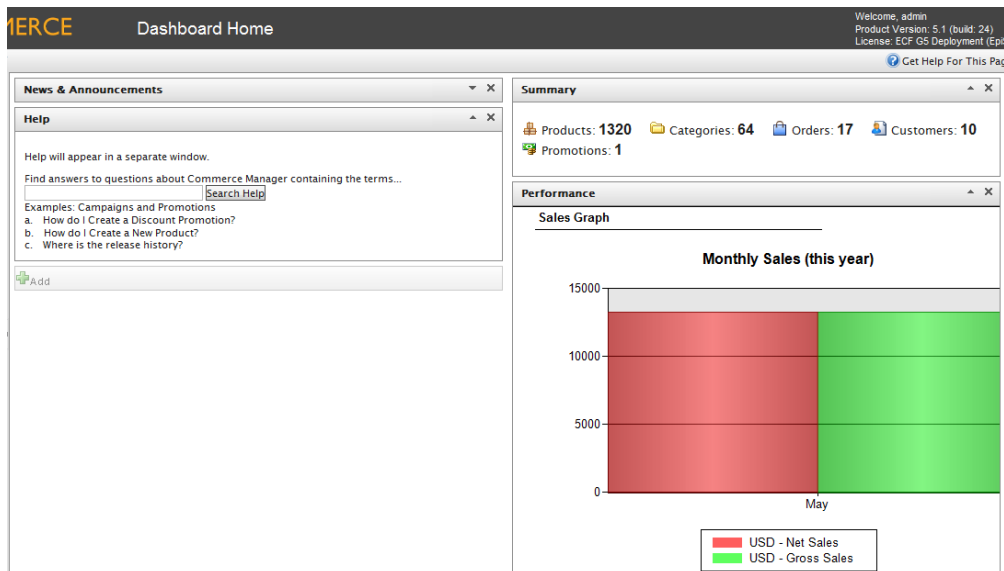
Customizing the Dashboard

The user can customize the Dashboard by re-arranging the layout of the Controls, remove or add Controls, or adjust the page template. The five Controls available are: **Help**, **Summary**, **News & Announcements**, **Alerts**, and **Performance**.

To access the Dashboard, click on **Dashboard > Home** from the left navigation frame.



The screenshot below shows the Controls available to the user.



The **Help** Control allows users to search for help topics in the EPiServer Commerce documentation site. Enter key terms into the Search field and then click on Search Help. Other frequently asked questions (FAQs) are listed underneath the Search field.

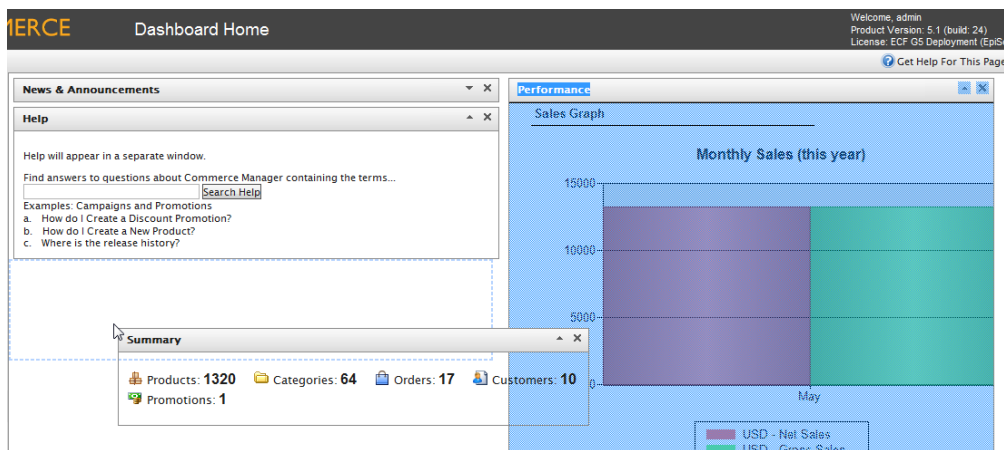
The **Summary** Control displays the total number of **Products**, **Categories**, **Orders**, **Customers**, and **Promotions**.

The **News & Announcements** Control displays a feed of the latest news articles.

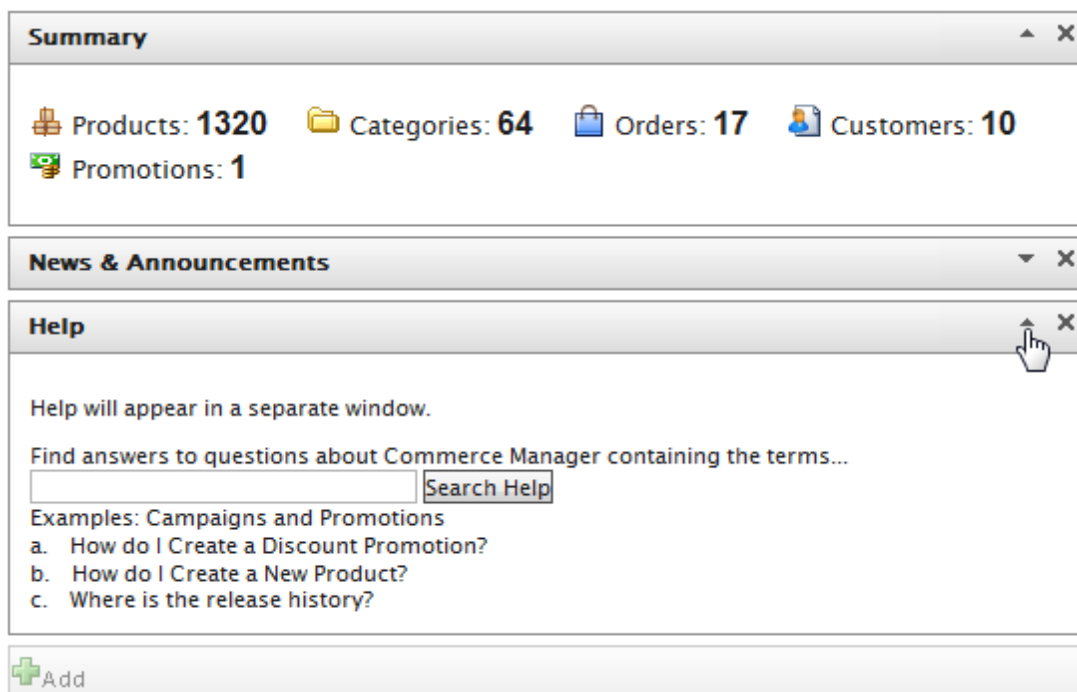
The **Performance** Control displays a Sales Graph and a graph for the Total Sales of the year.

Rearranging, Collapsing, and Removing Controls

To rearrange Controls, hover the mouse cursor over the title bar and drag the Control to another "space" in the Dashboard.



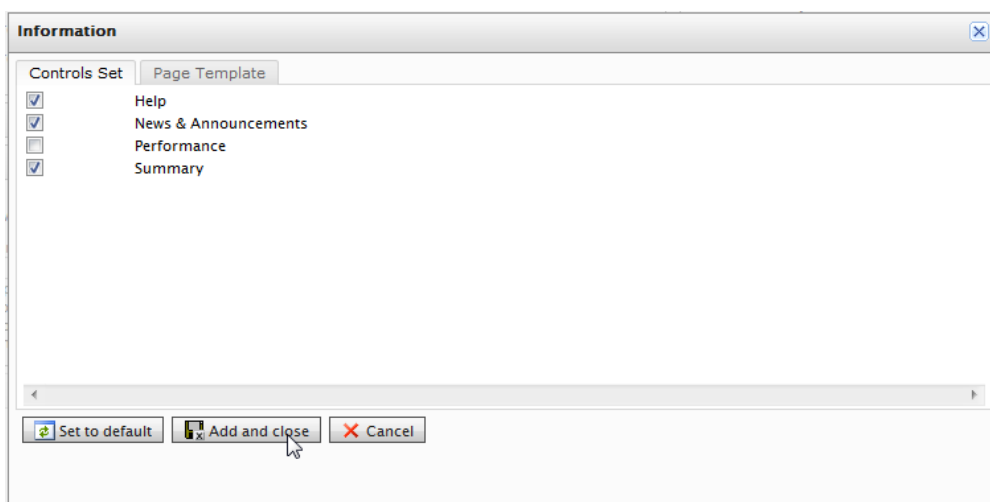
To collapse Controls, click on the **Up-arrow** icon. To expand a collapsed Control, click on the **Down-arrow**.



To remove a Control, click on the **X** icon.

Adding Controls and Adjusting the Page Template

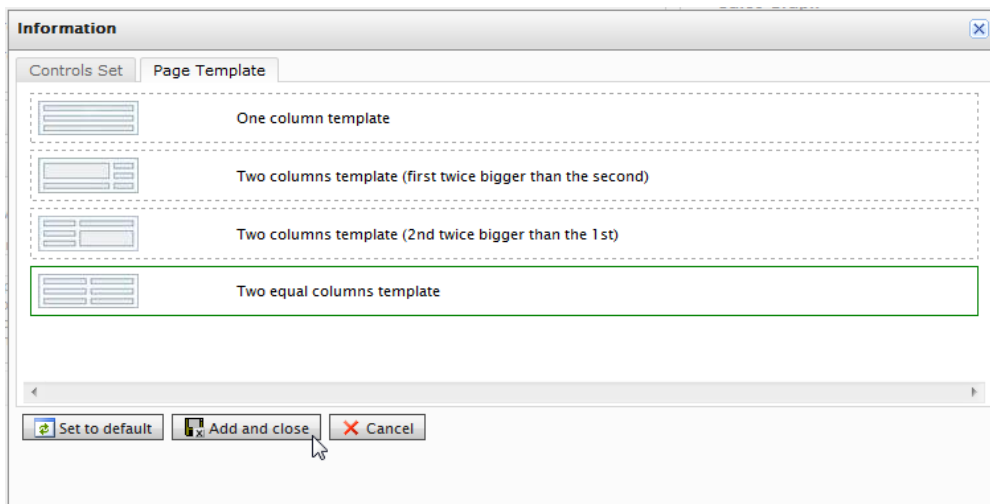
Click on **Add** on the Dashboard page. The Information form pops up above the Dashboard page.



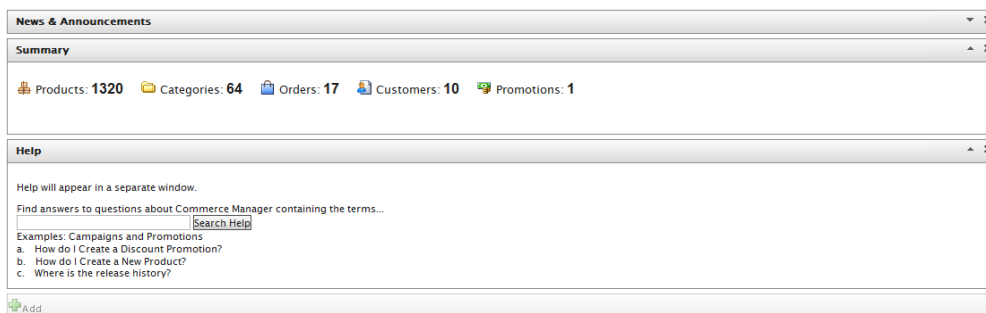
The **Controls Set** tab allows you to select which Controls you want to add to the Dashboard. Check the boxes and then click on **Add and Close**. The Controls you selected will appear on the Dashboard.

To reset the Dashboard back to the default state before any customizations were made, click on **Set to Default**.

On the Page Template tab, you can adjust the Dashboard page layout to a **One column template**, **Two columns template (first twice bigger than the second)**, **Two columns template (2nd twice bigger than the 1st)**, and **Two equal columns template**. Click on the layout you want and then click on **Add and close**.



The screenshot below is an example of how a **One column template** looks.



Marketing

The Commerce Manager Marketing system consists of the following components:

- **Campaigns** - a way to organize marketing activities. Campaigns must be associated with Promotions in order to provide customer discounts. Optionally, Campaigns can also be tied to Customer Segments for targeted marketing purposes.
 - For example, you can create a seasonal campaign that will include different Promotions targeted for the Spring season.
- **Promotions** - a way to apply various discounts to the products, order totals or shipping. A Promotion is a marketing tool used to increase sales of certain products or product lines. Various incentives such as lower priced pricing and other discounts can be employed as part of a Promotion.
 - Promotions are always tied to Campaigns.
 - Promotions can be classified into two types: 1) either you can create a Promotion that is visible prior to checkout or 2) you can configure the Promotion to be displayed during the checkout process.

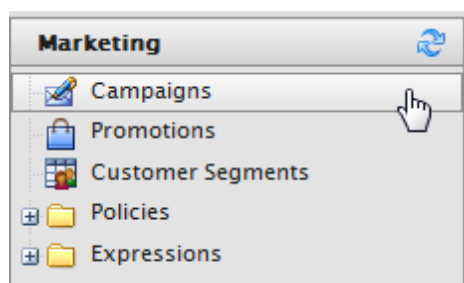
- The most powerful aspect of the Marketing system is the Expression Engine which allows variable conditions to be applied when creating a Promotion. These conditions vary from the number of items, the percentage discount, shipping rates and many others.
- **Customer Segments** - these determine the target audience for the Promotions. Customer Segments determine the target audience for the Promotions. Within a Campaign, all Promotions will be applied to whatever Customer Segments associated with the same Campaign. Members of the Customer Segments can be pre-defined in static groups or you can use the Expressions Engine to create dynamic groups whenever Promotions are run.
 - For example, you can have a Customer Segment that targets all users from the Los Angeles area. You can create an Expression that will include all the customers whose home city is Los Angeles. Thus, when a user registers on the site he immediately becomes part of the target Customer Segment.
- **Expressions** - these are customizable Conditions which allow users to extend different aspects of the Marketing system -- Promotions, Customer Segments and Policies all rely on Expressions. There is an Expressions Engine which is a core technology behind the Marketing system.
 - For example, you want to set a Promotion for "40% off Item X." The Expression or Condition to enable this Promotion would include: Catalog ID for Item X and Reward of 40%.
- **Policies** - rules that are always executed when Promotions are applied. This allows a Marketing manager to declare rules just once for the whole site.
 - An example of a rule is as follows: Do not allow negative orders.

Campaigns

Campaigns provide a way to organize marketing activities. Campaigns must be associated with Promotions in order to provide customer discounts. Optionally, Campaigns can also be tied to Customer Segments for targeted marketing purposes. For example, you can create a seasonal Campaign that will include different Promotions targeted for the Spring season.

Browsing Campaigns

To browse Campaigns, go to **Marketing > Campaigns** to open the **Campaign List**.



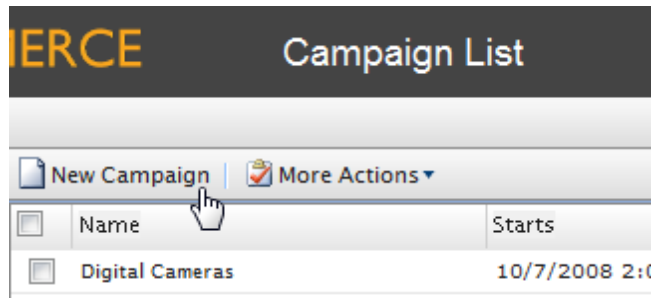
From the **Campaign List**, you can create a **New Campaign** or edit existing ones.

Campaign List						
New Campaign More Actions						
<input type="checkbox"/>	Name	Starts	Ends	Is Active	Last Modified	Created
<input type="checkbox"/>	Digital Cameras	10/7/2008 2:00:00 AM	11/7/2020 1:00:00 AM	True		10/8/2008 12:14:13 AM

Creating a Marketing Campaign

Sales promotions are tied to specific Campaigns. A Campaign could be related to seasonal sales, such as Easter or Christmas. Campaigns are the first step to deploying targeted marketing efforts.

To create a new Campaign, click on **New Campaign** on the **Campaign List** page.



This opens up the **Campaign Edit** page.

1. Enter in a **Campaign Name**, such as "Christmas Campaign" or "Back to School Sale."
2. Enter in any **Comments** as notes about the Campaign.
3. Enter in a date directly (or click on the **Calendar** icon to select a date) and time into the **Available From** field. This will indicate when the Campaign is expected to start.
4. Enter in a date and time in the **Expires On** field.
5. Select the **Target Segments** from the list. Target segments are created under the Customer Segments section
6. Indicate whether or not the Campaign is **Active**, "Yes" or "No."
7. Indicate whether or not to **Archive** the Campaign, "Yes" or "No."
8. Once done, click on **OK**.

ERCE Campaign Edit

Overview

Campaign Name:
enter campaign name

Comments:

Available from:

Expires on:

Target Segments:

Active: ☒ Yes ☐ No

Archived: ☐ Yes ☒ No

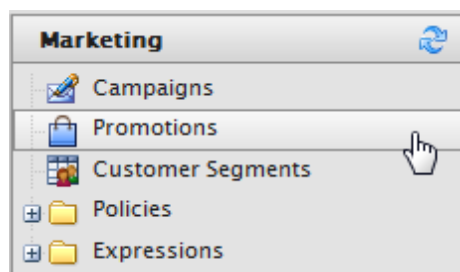
Promotions

Promotions provide a way to apply various discounts to the products, order totals or shipping. A Promotion is a marketing tool used to increase sales of certain products or product lines. Various incentives such as lowered pricing and other discounts can be employed as part of a Promotion.

Promotions are always tied to Campaigns. In addition, Promotions can be classified into two types: 1) either you can create a promotion that is visible prior to checkout or 2) you can configure the promotion to be displayed during the checkout process. The most powerful aspect of the Marketing system is the Expressions Engine which allows variable conditions to be applied when creating a Promotion. These conditions vary from the number of items, the percentage discount, shipping rates and many others.

Browsing Promotions

To view and browse Promotions, click on **Promotions** on the left navigation bar.



The **Promotion List** page opens, displaying a list of existing Promotions.

EPiSERVER Promotion List						
New Promotion More Actions						
<input type="checkbox"/>	Name	Group	Priority	Starts	Ends	Status
<input type="checkbox"/>	20% Off Canon Powershot Pro Series	entry	1	10/7/2008 2:00:00 AM	11/7/2014 1:00:00 AM	active

You can click through the name of a Promotion to view its properties.

EPiSERVER Promotion List						
New Promotion More Actions						
<input type="checkbox"/>	Name	Group	Priority	Starts	Ends	Status
<input type="checkbox"/>	20% Off Canon Powershot Pro Series	entry	1	10/7/2008 2:00:00 AM	11/7/2014 1:00:00 AM	active

EPiSERVER Promotion Edit	
Overview	
Promotion Type:	Catalog Entry: Buy X Get \$ Off Discount
Promotion Name:	20% Off Canon Powershot Pro Series
	<i>enter promotion name</i>
Display Name:	
English (United States)	
German (Germany)	
Spanish (Spain)	
French (France)	
Promotion Properties:	
Campaign:	Digital Cameras
Promotion Group:	entry

Deleting a Promotion

On the **Promotion List** page, checkmark the box next to the name of the Promotion and then click on **More Actions > Delete Selected** on the menu bar.

EPiSERVER Promotion List						
New Promotion More Actions						
<input type="checkbox"/>	Name	Group	Priority	Starts	Ends	Status
<input checked="" type="checkbox"/>	20% Off Canon Powershot Pro Series	entry	1	10/7/2008 2:00:00 AM	11/7/2014 1:00:00 AM	active

X Delete Selected
 Flip Status (active/inactive)

Creating an Entry Level Promotion

Out of the box, users can build these Catalog Entry Promotion Types:

- Catalog Entry: Build Your Own Discount
- Catalog Entry: Buy Catalog entry X, get catalog entry Y at a discount
- Catalog Entry: Buy X Get \$ Off Discount
- Catalog Entry: Buy X, get N quantity of Y at a Discount

The following are examples of how to create each type of Promotion.

Example: Build Your Own Discount - "40% Off Canon PowerShot S5"

Once you have selected "Build Your Own Discount" from the **Promotion Type** drop-down menu, enter in a **Promotion Name**, such as "40 % Off Canon PowerShot S5"

Under the **Display Name** section, enter in the display name for each language type.

Promotion Name:	<input type="text" value="40 % Off Canon Powershot S5"/> <i>enter promotion name</i>
Display Name:	
English (United States)	<input type="text" value="40 % Off Canon Powershot S5"/>
German (Germany)	<input type="text"/>
Spanish (Spain)	<input type="text"/>
French (France)	<input type="text"/>

Promotion Properties:

- Under the **Campaign** drop-down, select an existing Campaign created earlier
- **Promotion Group** is grayed out because the Promotion Type is specified
- From the **Combination with other promotions** drop-down, select which degree to which multiple Promotions can be combined. There are two other options: "Exclusive within select groups" and "Exclusive within all groups."
- Enter a numerical value into the **Priority** field (Promotions with a higher priority will be evaluated first)
- Optionally, enter in a **Coupon Code** that customers can redeem from the front-end public site to get receive the discount. Otherwise, leave the field blank.
- Set the **Status** of the Promotion either as "Active", "Inactive," "Suspended," or "Deleted" from the drop-down menu. Select Active to enable the Promotion.

Promotion Properties:	
Campaign:	<input type="text" value="Digital Cameras"/>
Promotion Group:	<input type="text" value="entry"/>
Combination with other promotions:	<input type="text" value="Combine with other promotions"/> <i>select the degree to which multiple promotions can be combined</i>
Priority:	<input type="text" value="1"/> <i>promotions with higher priority will be evaluated first</i>
Coupon Code:	<input type="text" value="Test"/> <i>will require code if entered</i>
Status:	<input type="text" value="Active"/> <i>status of the promotion</i>

Purchase Condition and Reward:

Here you can set your own **Purchase Condition** to receive the discount **Rewards**. To apply a 40% discount for Canon digital cameras, use the following settings in the screenshot.

Purchase Condition and Reward:

This type of promotion allows you to create your own custom promotion.

Use the condition below to restrict how the promotion will be applied.

Purchase Condition:



Use the actions below to assign rewards.

Rewards:



Redemption Limits:

Under this section, you can specify the redemption limits of this Promotion.

- Next to **Max. Total Redemption**, enter in the maximum number of times the Promotion can be redeemed.
- Next to **Max. Redemptions Per Order**, enter in the maximum number of times the Promotion can be redeemed per customer order.
- Next to **Max. Redemptions Per Customer**, enter in the number of times a Promotion can be by a single customer.

Redemption Limits:

Max. Total Redemptions:	<input type="text" value="300"/>	(Redeemed:) <i>number of times the promotion can be used by all customers, enter 0 for unlimited</i>
Max. Redemptions Per Order:	<input type="text" value="1"/>	<i>number of times the promotion can be used in a single order, enter 0 for unlimited</i>
Max. Redemptions Per Customer:	<input type="text" value="1"/>	<i>number of times the promotion can be used by a single customer, enter 0 for unlimited</i>


Schedule:

Enter the date and time when the Promotion is **Available** and when it **Expires**.

Click **OK** to save the Promotion. The Promotion will appear in the **Promotion List**.

ERCE Promotion List				
New Promotion More Actions ▼				
<input type="checkbox"/>	Name	Group	Priority	Starts
<input type="checkbox"/>	20% Off Canon Powershot Pro Series	entry	1	10/7/2008 2:00:00 AM

When the Promotion is applied, the price on the front-end should change.

Action	Description	Each	Qty
Move to wishlist Remove	 Canon PowerShot Pro Series S5 IS 8.0MP Digital Camera with 12x Optical Image Stabilized Zoom <small>Item #: 013803079616</small> <small>20% Off Canon Powershot Pro Series</small>	\$449.99 \$359.99 You save: \$90.00	1 ▾

Buy catalog entry X, get catalog entry Y at a discount

The steps to create this discount are similar to creating a custom discount. The difference is the the Purchase Condition and Reward.

1. Under the **Select catalog entry X** drop-down menu, select a specific catalog entry.
2. Under the **Select catalog entry Y** drop-down menu, select another specific catalog entry.
3. Enter in a value for the **Quantity of "X" needed to qualify for the promotion**. For example, the customer must purchase 2 of Catalog Entry X as a prerequisite for the discount.
4. Enter in a value for the **Quantity of "Y" needed to qualify for the promotion**. For example, the customer must purchase 3 of Catalog Entry Y as a prerequisite for the discount.
5. In the Amount field, enter in a number and select from the drop-down to indicate that the Promotion is **Percentage Based or Value Based**. For example, if you enter 40 and select Percentage Based, the Promotion will take off 40%. If Value based, it will be 40 off the total price.

Purchase Condition and Reward:

This type of promotion makes additional SKUs available at a percentage discount when an order includes some required amount of the specified SKU.

Select catalog entry X:	<input type="text" value="510 Headset Charger [ELCB000GKLGX46]"/>
Select catalog entry Y:	<input type="text" value="Plantronics Voyager 510 - Bluetooth Headset Carrying Case"/>
Quantity of 'X' needed to qualify for the promotion:	<input type="text" value="2"/>
Quantity of 'Y' needed to qualify for the promotion:	<input type="text" value="1"/>
Amount:	<input type="text" value="20"/> <input type="text" value="Percentage Based"/>

Buy X Get \$ Off Discount

This type of Promotion gives a discount per item by purchasing the minimum quantity specified under these Purchase Conditions.

1. Enter in a **Minimum quantity** that the customer needs to purchase in order to receive the discount.
2. Enter in the **Amount** of the Promotional discount, whether Percentage Based or Value Based.
3. Select any number of **Variations** from the drop-down menu and click on "add variation." Repeat to add more **Variations** to this Promotion. Click on the red **X** button next to the Variation to delete it.

Purchase Condition and Reward:

This type of promotion gives \$ off discount per item for the minimum quantity.

Minimum quantity:	<input type="text" value="0"/>
Amount:	<input type="text" value="0"/> <input type="text" value="Percentage Based"/>
Variations:	<input type="text" value="510 Headset Charger [ELCB000GKLGX46]"/> add variation <div> ✖ Apple Iphone PDA Premium Reusable LCD Screen Protector with Lint Cleaning Cloth [ELCB000TGQHAW6] </div> <div> ✖ Apple iPhone 1G Soft Polycarbonate Slim fit Case -Black(Cozip Brand) Made in Korea [ELCB000WHK3V26] </div> <div> ✖ 510 Headset Charger [ELCB000GKLGX46] </div>

Buy X, get N quantity of Y at a discount

This type of Promotion allows a customer to be eligible to buy a designated number of items at a reduced price.

1. Select an **Entry X variation** from the drop-down menu and click on "add variation." (What does "Exclude" do?)
2. **Select catalog entry Y** from the drop-down menu. A certain number of "Y" entries will be discounted based on the Purchase Conditions.
3. Enter in a **Max quantity Y** for the maximum number of Y entries eligible for a discount.
4. Enter in the **Amount** of the Promotional discount, whether Percentage or Value based.

Purchase Condition and Reward:

This type of promotion eligible to buy designated number of item at a reduced price.

Entry X variation: ☐ Exclude

add variation

✗ Apple Iphone PDA Premium Reusable LCD Screen Protector with Lint Cleaning Cloth [ELCB000TGQHAW6]

✗ Ultimate Ears-Metro.fi 150 Noise Isolating Earphones (Black) [ELCB000PBOWNK6]

Select catalog entry Y:

Max quantity Y:

Amount:

Creating an Order Level Promotion

Order Level Promotions are discounts applied if the overall Order satisfies the conditions specified by the Promotion.

There are two types of Order Level Promotions available to the user:

- **Order Sub Total Volume Discount** - if the order subtotal minimum is met, then the customer receives the discount
- **Build Your Own Discount** - can create a custom Order Level promotion based on a range of Purchase Conditions and Rewards (similar to creating a custom catalog entry discount)

Order Sub Total Volume Discount

Enter in the **Minimum order amount** into the field. For example, if the order amount was set to \$200, then the customer must have \$200 or more in his shopping cart to qualify for the discount.

Enter in the **Amount** of the discount. It can either be "Percentage Based" or "Value Based." If Percentage Based, then the customer gets a percentage off the price. If Value Based, the customer gets a fixed amount discounted off.

Purchase Condition and Reward:

This type of promotion discounts the order subtotal if minimum order amount is met.

Minimum order amount:

Amount:

Example: Build Your Own Discount - "20% Off for a Shopping Cart Subtotal of \$100 or More"

Like a custom Catalog Entry discount (add link here), users can create their own custom Order Level discount based on a list of **Purchase Conditions** and **Rewards**. This means that there is a wide range of Order Level discount possibilities.

The follow Condition and Reward example shows how to create a Promotion that gives 20% off for a shopping cart subtotal of \$100 or more.

Purchase Condition and Reward:

This type of promotion allows you to create your own custom promotion.

Use the condition below to restrict how the promotion will be applied.

Purchase Condition:

And

ShoppingCart.SubTotal Equals 99.99

Use the actions below to assign rewards.

Rewards:

And

get % off whole order reward 20.00%

The discount should reflect on the shopping cart on front-end public site.

Creating a Shipping Level Promotion

Shipping Level Promotions are Promotions that give shipping discounts, such as free shipping for an order over \$50.

There are two types of Shipping Level Promotions available to the user:

- Buy X Get \$ Off Shipment Discount
- Buy X Get Y Fre

Buy X Get \$ Off Shipment Discount

This Promotion type applies shipping discount if the specified **Variations** total the **Minimum Quantity** set or more.

1. Enter in a **Minimum Quantity**.
2. Enter in an **Amount** of the discount Reward, and select from the drop-down whether it is "Percentage Based" or "Value Based."
3. Select the **Variations** from the drop-down list that qualify for the discount. Click on **Add Variation** to add the Variation to the list.

Purchase Condition and Reward:

This type of promotion gives \$ off discount per item for the minimum quantity per shipment.

Minimum quantity:

Amount: Percentage Based ▼

Variations: Adapter Car Lighter Explorer / Voyager [ELCB000CH5M2M6] ▼ add variation

✗ 510 Headset Charger [ELCB000GKLGX46]

✗ Adapter Car Lighter Explorer / Voyager [ELCB000CH5M2M6]

Buy X Get Y Free

This shipping discount allows a user to set two Catalog entries for X and Y. If X is in their shopping cart, then the customer receives the Y item at no cost.

Purchase Condition and Reward:

Customer adds an eligible item (X) to their Shopping Bag, and receives another item (Y) at no cost.

Select catalog entry X:

Plantronics Voyager 510 - Bluetooth Headset Carrying Case ▼

Select catalog entry Y:

Adapter Car Lighter Explorer / Voyager [ELC8000CH5M2M6] ▼

Customer Segments

Customer Segments determine the target audience for the Promotions or Campaigns. Customer Segments determine the target audience for the Promotions. Within a Campaign, all Promotions will be applied to whatever Customer Segments associated with the same Campaign. Members of the Customer Segments can be pre-defined in static groups or you can use the Expressions Engine to create dynamic groups whenever Promotions are run.

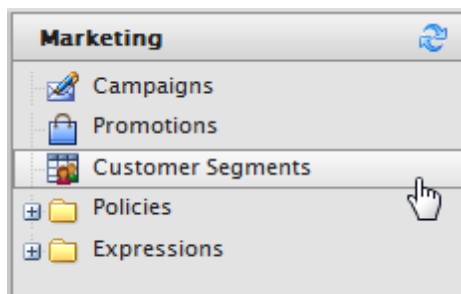
For example you can have a Customer Segment that targets all users from the Los Angeles area. You can create an Expression that will include all the customers whose home city is Los Angeles. Thus, when a user registers on the site he immediately becomes part of the target Customer Segment.

Creating a Customer Segment

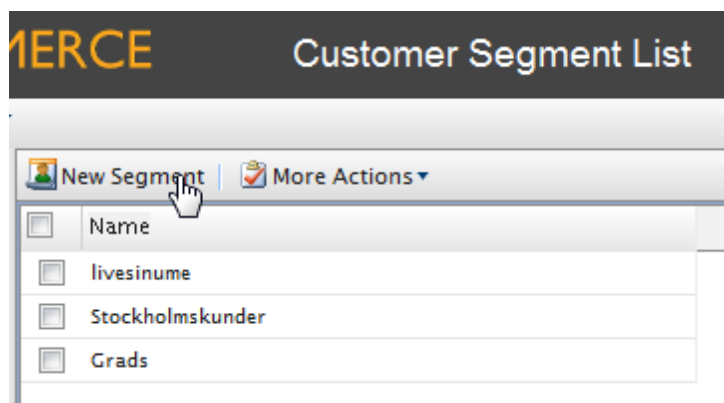
Customer segments specify which group of Customers a user wants to specifically target with their Campaigns.

Creating a Customer Segment Assigned to Contacts

Go to **Marketing > Customer Segments**.



Click on **New Segment** on the menu bar to open the **Segment Edit** page.



ERCE Segment Edit

Overview

Segment Name:
enter segment name

Display Name:

Description:

Members: ☐ Exclude member
add member

Conditions:

The above conditions will be evaluated in runtime and if any are true, i

1. Enter in a **Segment Name**, such as "Company X Team."
2. Enter in a **Display Name**, which will appear to users when associating this Customer Segment when Creating a Marketing Campaign.
3. Enter in a **Description**.
4. Select from a list of contacts from the **Members** drop-down to assign them to this **Customer Segment**. Select the name from the drop-down and then click **add member**. You can choose to **Exclude** member by clicking on the checkbox and then clicking **add member**.
5. Once done, click **OK** to save the Customer Segment.

EPiSERVER Commerce Segment Edit

Overview

Segment Name:
enter segment name

Display Name:

Description:

Members: ☒ Exclude member

add member

- ☒ Mats Hellström
- ☒ Mary Smith
- ☒ Peter Sunna

Conditions:

The above conditions will be evaluated in runtime and if any are true, the customer is part of the segment.

Creating a Customer Segment with Conditions

Instead of assigning members manually to a Customer Segment, you can use **Conditions** to apply rules. If a customer satisfies the Conditions, then the customer is part of the Customer Segment.

To add Conditions to the Customer Segment, click on **New Condition** on the **Segment Edit** page. This example will show how to specify Mediachase or Techarts emails as part of this Customer Segment.

Enter in an **Expression Name**, such as "Mediachase or Email Addresses."

Setup the Conditions based on the screenshot below.

Condition Dialog

Expression Name:
enter expression name



Expression Xml:

```

And
├── Or
│   ├── Email Equals (Text) Company X
│   └── Email Equals (Text) Techarts
└── +
  
```

Click **OK** to save the Conditions.

Conditions:

  Company X or Techarts Email

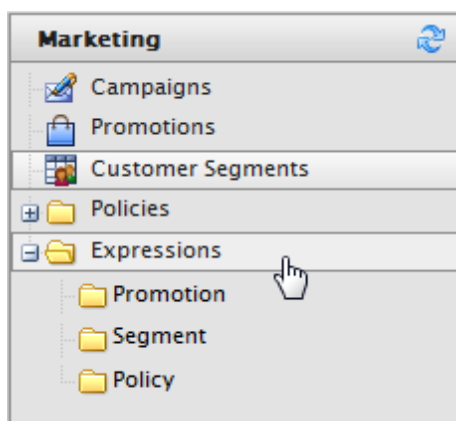
The above conditions will be evaluated in runtime and if any are true, the customer will be part of this segment.

Creating Expressions

Expressions are customizable Conditions which allow users to extend different aspects of the Marketing system -- Promotions, Customer Segments and Policies all rely on Expressions. There is an Expressions Engine which is a core technology behind the Marketing system.


Users can create Expressions under **Promotion**, **Segment**, or **Policy**.

To access and create Expressions, click on **Marketing > Expand Expressions > Either Promotions/Segment/Policy** to view the **Expression List** page.



Expression List				
New Expression More Actions				
<input type="checkbox"/>	Name	Description	Modified	Created
<input type="checkbox"/>	BuyXGetOffDiscount	This type of promotion gives \$ off discount per item for the minimum quantity.		10/8/2008 4:21:58 AM

To create a new Expression, click on **New Expression**. The **Expression Edit** page appears.

 In order to create an Expression, knowledge of XML is required. Non-technical users may want to skip this section.

Enter in an **Expression Name**, such as "ShippingCustomDiscount."

Enter in a **Description** of the Expression.

Enter in the **Expression Xml**.

Under **Category**, select from the drop-down whether this Expression is for a "Promotion," "Segment," or "Policy." Depending on your selection, the Expression will appear under those respective folders. Click **OK** to save changes.

[illegible]

Creating Policies

Policies are rules that are always executed when Promotions are applied. Promotion policies determine whether a conflict situation will arise when a particular promotion is applied in addition to any previously applied promotions. If no conflict is detected, this promotion is added to the list of applicable promotions; otherwise it is eliminated and will not be applied to the order.

Policies are the business rules on how to eliminate similar promotions for the same order or same product. Policies are preconfigured for each store. Policies can be optionally associated with one or more promotion groups.

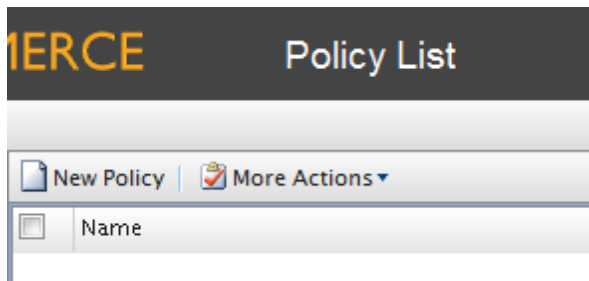
- **Local Policy** - If a policy is associated with a promotion group, it is considered a local policy, and applies only to those promotions in the group to which this policy is associated. If a policy is not associated with a promotion group, it is considered a global policy which applies to all promotions.

This allows a Marketing manager to declare rules just once for the whole site. For example, you can create a Policy such as this: Do not allow negative orders.



Creating Policies, like creating Expressions, is meant for advanced users. Most non-technical users will want to skip this section.

To create a new Policy, go to **Marketing > Policies** to open the **Policy List**.



Click on **New Policy** to open the **Policy Edit** page.



Policy **Status** and Policy **Is Local** has not been fully implemented. Therefore, all policies will be global (meaning it cannot be limited to a Promotion Group) until this feature becomes available in a future release.

1. Enter in a **Policy Name**.
2. Enter the **Status** of the Policy.
3. Select "Yes" or "No" to set the Policy **Is Local**.
4.
 - **Policy Is Local is No** - this is the default behavior. This means that this Policy is not part of a Promotion Group and is available for all Promotions.
 - **Policy Is Local is Yes** - this means this Policy is part of a Promotion Group and is applicable only for that Promotion Group
5. Select an existing Policy **Expression** from the drop-down menu.
6. Select from the **Groups** list to place the Policy under.
7. Click **OK** when done.

Order Management

The Order Management system provides Shopping Carts, order capture, order fulfillment, and payment function support. Orders can be generated as purchases are made from the public site. Alternatively, Purchase Orders can be manually created by a Commerce Manager user with the appropriate Roles and Permissions.

All orders, whether they were generated from the front-end site or from Commerce Manager, will appear in the **Order Management > Purchase Orders** area.

Items that are in a customer's Shopping Cart will appear in the **Order Management > Carts** area until the order has been completely processed, at which time the item moves from the Carts area to the Purchase Orders area.

Orders that are placed on the front-end or manually created as a **Purchase Order** via the Commerce Manager appear on the front-end **Account Dashboard**. To access your Account Dashboard from the front-end site, click **Log In to Your Account** located on the top bar.

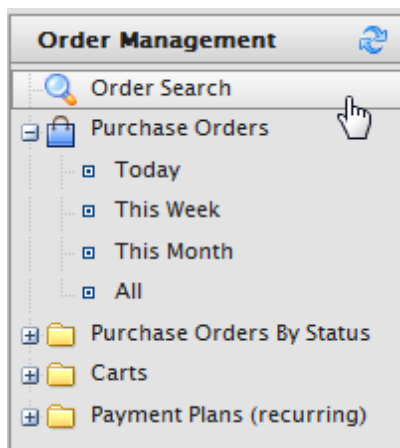
- **Purchase Orders** - the manual method of generating an order for a customer (rather than having the customer checkout and complete an order from the front-end site). It allows users to generate orders directly from the Commerce Manager.
 - **Status** - set to "NewOrder," "Submitted," "Processing," "Cancelled," "Rejected," "Shipped"
 - **Currency** - select a Currency type from the drop-down menu
 - **Customer** - select a Customer from the drop-down list of Contacts
 - **Billing Address** - select a Billing Address from the drop-down menu
 - **Affiliate** - select an Affiliate from the drop-down list. (Affiliates can be used when integrating with other systems and can only be edited in the database. Users do not have Commerce Manager access for managing Affiliates).
 - **Tracking Number** - enter in a Tracking Number of the shipment
 - **Expiration Date** - enter in a Expiration Date for the order if this order is tied to a Recurring Payment Plan for subscription-based transactions
 - **Parent Order Id** - this can be used to relate Purchase Orders to a payment plan or other order. When creating a Purchase Order from a Recurring Payment Plan, the Parent Order ID is automatically associated with the Payment Plan ID.
 - **Line Items** - you can associate actual Products/SKUs/Packages/Bundles to orders or Purchase Orders
 - **ID** - it is automatically generated
 - **Display Name** - this can be edited and changed
 - **List Price** - enter in the price that will appear for the item
 - **Discount** - enter in the Discount value that will subtract from the List Price
 - **Shipping Address** - this is automatically generated if a Shipping Address has already been associated with the Purchase Order
 - **Shipping Method** - this is automatically generated if a Shipping Address has already been associated with the Purchase Order
- **Recurring Payment Plans** - payments that are initiated by the Commerce Manager on a regular cycle (i.e. applicable in a subscription-based scenario)

- **Plan Cycle** - this determines the period of time that a payment plan will be initiated. Options include: "No Cycle," "Daily Cycle," "Weekly Cycle," "Monthly Cycle," "Yearly Cycle."
- **Cycle Length** - If Cycle Length = 1, then this payment plan will be initiated once a month. If Cycle Length = 2, then this payment plan would be initiated once every 2 months.
- **Max Cycle** - the maximum number of cycles that this payment plan will be initiated
- **Completed Cycles** - this value displays the number of times that this payment plan has been initiated.

Searching for Orders

Users can search for existing Orders made by customers on the front-end public site as well as orders created in Commerce Manager.

To search for Orders, go to **Order Management > Order Search**.



Under **Order Search**, search fields include: **Class Type**, **Status**, **Date Range**, **ID**, and **Customer**. Class Type, Status, and Date Range each have a drop-down menu to select various filter options.

Class Type Options: "Purchase Order," "Shopping Cart," "Payment Plan."

Status Options: "NewOrder," "Submitted," "Processing," "Cancelled," "Rejected," "Shipped"

Date Range: "All," "Today," "This Week," "This Month"

To conduct a search, click on the **Search** button and results based on the filters will appear in the frame below or return no results (or null).

Search Example

Here is an example search using a "Purchase Order" **Class Type**, "NewOrder" **Status**, **Date Range** of "This Week". The **ID** and **Customer** fields are left blank. The results are in the screenshot below.

EPiSERVER COMMERCE Order Search

Class Type: Purchase Order
 Status: NewOrder
 Date Range: This Week
 ID:
 Customer: Search

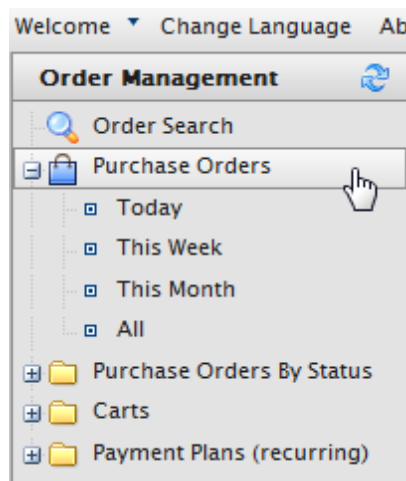
ID	Customer	Total	Status	Last Modified
53	Dung Le	1501.0000	NewOrder	Yesterday, 10:18 AM

Browsing and Creating Purchase Orders

Creating Purchase Orders allows Commerce Manager users to generate orders directly from the Commerce Manager. It is the manual method of generating an order for a customer (rather than having the customer checkout and complete an order from the front-end site).

Browsing Orders

To begin generating Purchase Orders, click on **Order Management > Purchase Orders** to view the **Order List**.



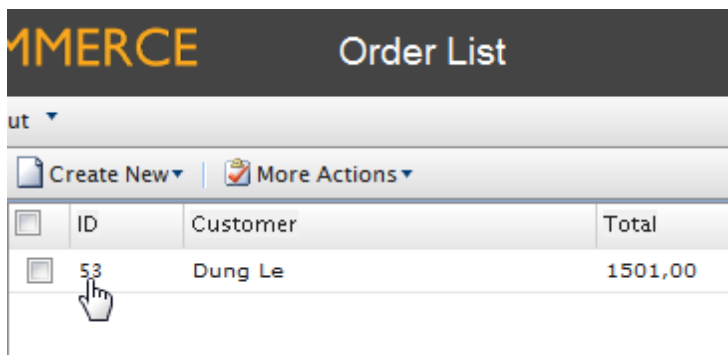
Optionally, you can click on **Today**, **This Week**, or **This Month** underneath **Purchase Orders** to filter the list of existing Orders.

EPiSERVER COMMERCE Order List

Create New More Actions

ID	Customer	Total	Status	Last Modified
53	Dung Le	1501,00	NewOrder	Yesterday, 10:18 AM

You can view the details of an existing Purchase Order by clicking on the **ID** number.

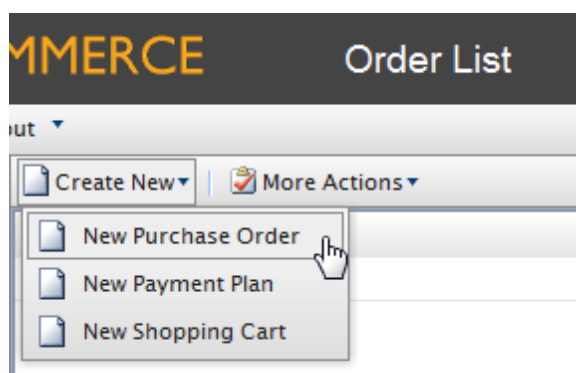


	ID	Customer	Total
<input type="checkbox"/>	53	Dung Le	1501,00

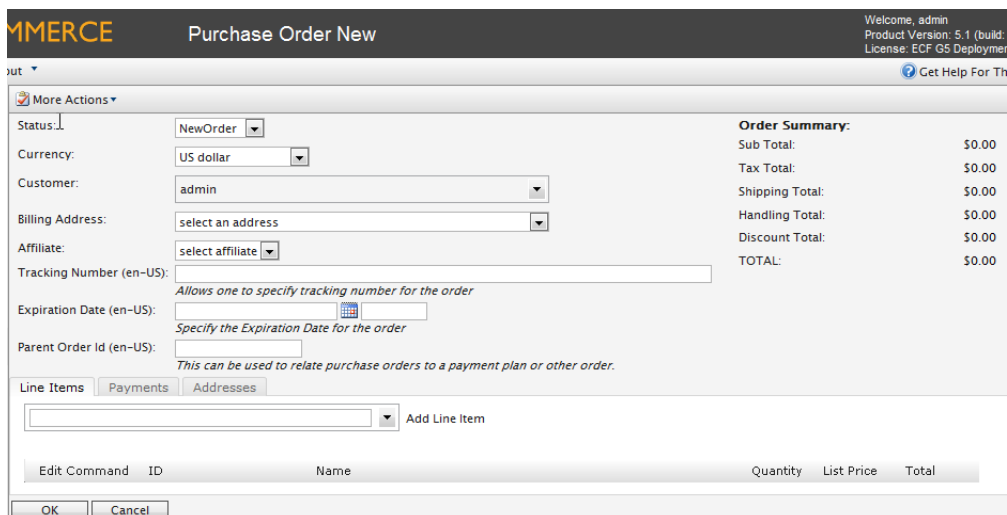
Existing Purchase Orders can be deleted by clicking on the checkbox next to the ID number and then clicking on **More Actions > Delete Selected**.

Creating a New Purchase Order

To create a new Purchase Order, click on **Create New > New Purchase Order**.



The **Purchase Order New** page appears.



Commerce Manager Purchase Order New

Welcome, admin
Product Version: 5.1 (build: ...)
License: ECF GS Deployment

Get Help For This Page

More Actions

Status: NewOrder

Currency: US dollar

Customer: admin

Billing Address: select an address

Affiliate: select affiliate

Tracking Number (en-US):
Allows one to specify tracking number for the order

Expiration Date (en-US):
Specify the Expiration Date for the order

Parent Order Id (en-US):
This can be used to relate purchase orders to a payment plan or other order.

Order Summary:

Sub Total:	\$0.00
Tax Total:	\$0.00
Shipping Total:	\$0.00
Handling Total:	\$0.00
Discount Total:	\$0.00
TOTAL:	\$0.00

Line Items | Payments | Addresses

Add Line Item

Edit Command	ID	Name	Quantity	List Price	Total
<input type="button" value="OK"/> <input type="button" value="Cancel"/>					

Fields Explained

- **Status** - set to "NewOrder," "Submitted," "Processing," "Cancelled," "Rejected," "Shipped"
- **Currency** - select a Currency type from the drop-down menu

- **Customer** - select a Customer from the drop-down list of Contacts
- **Billing Address** - select a Billing Address from the drop-down menu
- **Affiliate** - select an Affiliate from the drop-down list. (Affiliates can be used when integrating with other systems and can only be edited in the database. Users do not have Commerce Manager access for managing Affiliates).
- **Tracking Number** - enter in a Tracking Number of the shipment
- **Expiration Date** - enter in a Expiration Date for the order if this order is tied to a Recurring Payment Plan for subscription-based transactions
- **Parent Order Id** - this can be used to relate Purchase Orders to a payment plan or other order. When creating a Purchase Order from a Recurring Payment Plan, the Parent Order ID is automatically associated with the Payment Plan ID.

On the right of the Purchase Order form is the **Order Summary**.

To save the Purchase Order, click on **OK**. The name of the Purchase Order will be based on the **Customer** Name.

There are tabs below the Purchase Order form to add more details including **Line Items**, **Addresses**, and **Shipping information**.

Status:	NewOrder	Order Summary: Sub Total: \$0.00 Tax Total: \$0.00 Shipping Total: \$0.00 Handling Total: \$0.00 Discount Total: \$0.00 TOTAL: \$0.00
Currency:	US dollar	
Customer:	admin	
Billing Address:	select an address	
Affiliate:	select affiliate	
Tracking Number (en-US):	<input type="text"/>	
Expiration Date (en-US):	<input type="text"/>	
Parent Order Id (en-US):	<input type="text"/>	
<i>Allows one to specify tracking number for the order</i> <i>Specify the Expiration Date for the order</i> <i>This can be used to relate purchase orders to a payment plan or other order.</i>		

Adding Line Items to the Purchase Order

On the bottom of the form are three tabs: **Line Items**, **Payments**, and **Addresses**.

Under **Line Items**, users can select from the drop-down menu Line Items, or items that exist in a particular catalog, to add to the Purchase Order. You can enter in the keyword of the Line Item into the field and the drop-down menu will auto-populate with items that match that keyword. For example, if you enter in "Apple," all items with the name Apple will appear in the drop-down menu as a selection. To add the Line Item to the Purchase Order, click on **Add Line Item**.

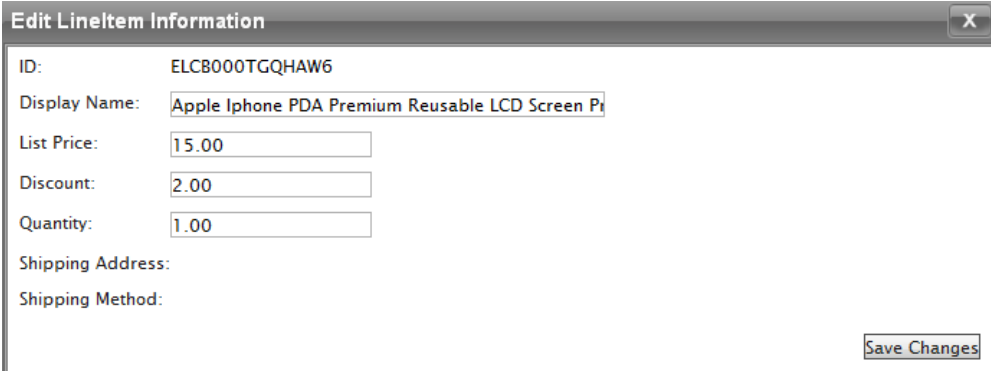
Line Items	Payments	Addresses						
<input type="text" value="Apple Iphone PDA Premium Reusable LCD Screen Protector"/> <input type="button" value="Add Line Item"/>								
<table border="1"> <thead> <tr> <th>Edit Command</th> <th>ID</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td colspan="3"> </td> </tr> </tbody> </table>			Edit Command	ID	Name			
Edit Command	ID	Name						
<input type="button" value="OK"/> <input type="button" value="Cancel"/>								

The **Edit LineItem Information** pop-up appears after clicking on **Add Line Item**.

- **ID** - it is automatically generated
- **Display Name** - this can be edited and changed

- **List Price** - enter in the price that will appear for the item
- **Discount** - enter is the Discount value that will subtract from the List Price
- **Shipping Address** - This is automatically generated if a Shipping Address has already been associated with the Purchase Order
- **Shipping Method** - This is automatically generated if a Shipping Address has already been associated with the Purchase Order

Click **Save Changes** to add the Line Item.



Edit LineItem Information

ID: ELCB000TGQHAW6

Display Name: Apple Iphone PDA Premium Reusable LCD Screen P

List Price: 15.00

Discount: 2.00

Quantity: 1.00

Shipping Address:

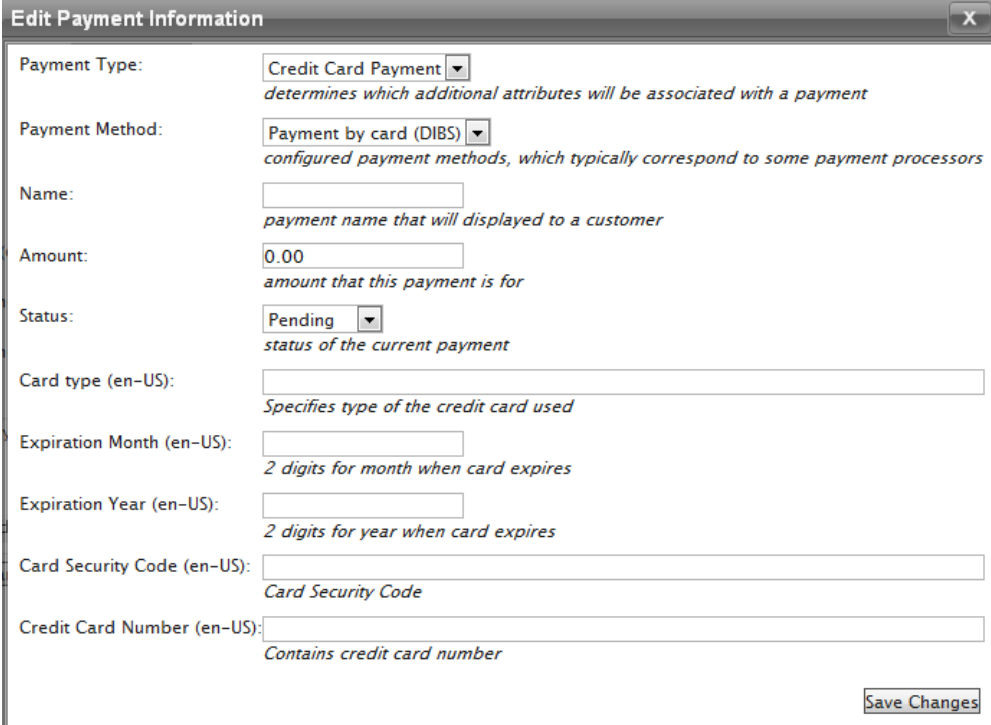
Shipping Method:

Save Changes

Adding a Payment to the Purchase Order

Click on the **Payments > New Payment** in the Payments tab. The **Edit Payment Information** pop-up form appears. This allows you to attach a **Payment Type** to the Purchase Order, such as a credit card or gift card.

Depending on your selection, the available form fields will change. The following five screenshots show the different forms available for each **Payment Type**.



Edit Payment Information

Payment Type: Credit Card Payment
determines which additional attributes will be associated with a payment

Payment Method: Payment by card (DIBS)
configured payment methods, which typically correspond to some payment processors

Name:
payment name that will displayed to a customer

Amount: 0.00
amount that this payment is for

Status: Pending
status of the current payment

Card type (en-US):
Specifies type of the credit card used

Expiration Month (en-US):
2 digits for month when card expires

Expiration Year (en-US):
2 digits for year when card expires

Card Security Code (en-US):
Card Security Code

Credit Card Number (en-US):
Contains credit card number

Save Changes

Edit Payment Information

Payment Type:

Cash Card Payment

determines which additional attributes will be associated with a payment

Payment Method:

Pay By Phone

configured payment methods, which typically correspond to some payment processors

Name:

payment name that will displayed to a customer

Amount:

0.00

amount that this payment is for

Status:

Pending

status of the current payment

Cash Card Number (en-US):

Contains cash card number

Cash Card Security Code (en-US):

Card Security Code

Save Changes

Edit Payment Information

Payment Type:

Invoice Payment

determines which additional attributes will be associated with a payment

Payment Method:

Pay By Phone

configured payment methods, which typically correspond to some payment processors

Name:

payment name that will displayed to a customer

Amount:

0.00

amount that this payment is for

Status:

Pending

status of the current payment

Invoice Number (en-US):

Save Changes

Edit Payment Information [X]

Payment Type:
determines which additional attributes will be associated with a payment

Payment Method:
configured payment methods, which typically correspond to some payment processors

Name:
payment name that will displayed to a customer

Amount:
amount that this payment is for

Status:
status of the current payment

Card type (en-US):
Specifies type of the credit card used

Expiration Month (en-US):
2 digits for month when card expires

Expiration Year (en-US):
2 digits for year when card expires

Gift Card Number (en-US):

Gift Card Security Code (en-US):

[Save Changes](#)

Edit Payment Information [X]

Payment Type:
determines which additional attributes will be associated with a payment

Payment Method:
configured payment methods, which typically correspond to some payment processors

Name:
payment name that will displayed to a customer

Amount:
amount that this payment is for

Status:
status of the current payment

[Save Changes](#)

Example: Adding a Credit Card Payment to the Purchase Order

- Select the **Payment Type** as "Credit Card Payment."
- Select the **Payment Method**, either "Pay by Phone" or "Pay by Credit Card."
- Enter in a **Payment Name**, such as "Visa Credit Card" or "Mastercard Debit."
- Enter in the **Amount** to be charged.
- Enter in the **Status** of the Payment. Select as "Pending," "Failed," or "Processed."
- Enter in the **Card Type**, such as "Visa Debit."
- Enter in the **Expiration Month** (required field). Enter in this format: "MM."
- Enter in the **Expiration Year** (required field). Enter in this format: "YY."
- Enter in the **Card Security Code** of the card.

- Enter in the **Credit Card Number**.
- Click **Save Changes** to attach the Payment to the Purchase Order.

Edit Payment Information

Payment Type: determines which additional attributes will be associated with a payment

Payment Method: configured payment methods, which typically correspond to some payment processors

Name: payment name that will be displayed to a customer

Amount: amount that this payment is for

Status: status of the current payment

Card type (en-US): Specifies type of the credit card used



Expiration Month (en-US): 2 digits for month when card expires

Expiration Year (en-US): 2 digits for year when card expires

Card Security Code (en-US): Card Security Code

Credit Card Number (en-US): Contains credit card number

New Payment

Edit Command	Name	Amount	Status
 	Visa Credit Card	13.00	Pending

Adding Addresses to a Purchase Order

Click on **Addresses > New Address** to add an Address to the Purchase Order. The pop-up **Edit Address Information** form appears. Enter all relevant information pertaining to that customer.

Edit Address Information

Name:

First Name:

Last Name:

Organization:

Line 1:

Line 2:

City:

State:

Country Code:

Country Name:

Postal Code:

Region Code:

Region Name:

Day Phone:

Evening Phone:

Fax Number:

Email:

[Save Changes](#)

Addresses in the Addresses tab become selectable under the **Billing Address** drop-down menu on the Purchase Order form. Click on **Save Changes**.

Status:

Currency:

Customer:

Billing Address:

Affiliate:

Tracking Number (en-US):

Allows one to specify tracking number for the order

Expiration Date (en-US):



Specify the Expiration Date for the order

Parent Order Id (en-US):

This can be used to relate purchase orders to a payment plan or other

[Line Items](#) [Payments](#) [Addresses](#)

New Address

Edit Command	Name
 	Mary Smith

[OK](#) [Cancel](#)

Adding Shipment Information to a Purchase Order

After a Purchase Order is created and saved, the **Shipments** tab appear next to the **Addresses** tab once the user goes back to edit the Purchase Order. Here the user can add Shipment information to the Purchase Order.

To add Shipment information to a Purchase Order, click on **Shipments > New Shipment**. The **Edit Shipment Information** pop-up form appears.

Edit Shipment Information

Shipping Method: Fixed Shipping Rate

Method Name:

Address: Mary Smith

Tracking Number:

Total: 0

Discount: 0



Status:

Items To Ship: ☐ Apple Iphone PDA Premium Reusable LCD Screen Protector with Lint Cleaning Cloth

Save Changes

1. Select a **Shipping Method** from the drop-down menu, such as "Fixed Shipping Rate" or "Ground Shipping." Shipping Methods can be further customized under Shipping Methods within Administration.
2. Enter in the **Method Name**, such as "Standard Shipping."
3. Select an **Address** from the drop-down. Available addresses are based on the information under the Addresses tab.
4. Enter in the **Tracking Number** of the package given from the Shipping Provider.
5. Enter in the **Total** cost of shipping.
6. Enter in the **Discount** (if necessary) for shipment. The value in this field will subtract from the Total cost. For example, if the total cost of shipping is \$10, and the discount is \$2, then the total cost of shipping will be \$8.
7. Enter in the **Status** of the Shipment, any relevant information.
8. Place a check mark in the boxes next to the **Items to Ship** that apply to this Shipment. The items in this form will only appear if there are **Line Items** already added under the Line Items tab.
9. Once done, click **Save Changes**.

New Shipment

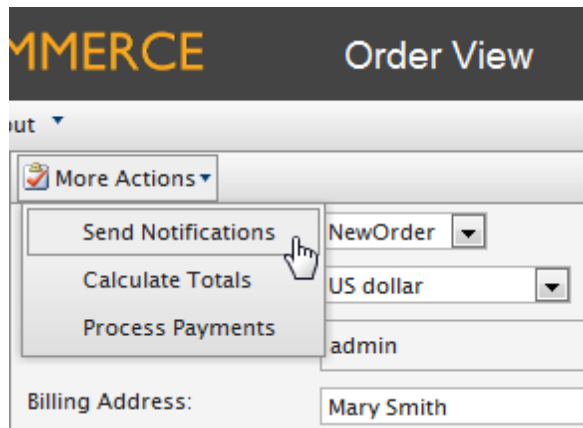
Edit Command	Name	Amount	Status
 	UPS	5.00	Shipped

OK Cancel

Sending Notifications, Calculating Totals, and Processing Payments

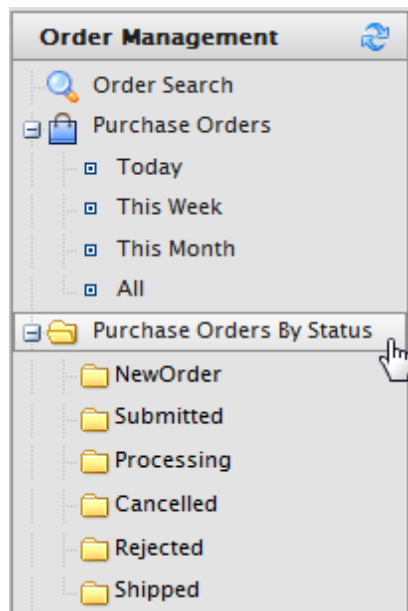
Within a Purchase Order, users can then send notifications to the customer, calculate the overall total of the Purchase Order, and process Payments.

- To send email notifications to the Customer, click on **More Actions > Send Notifications**.
- To calculate the total of the Purchase Order, click on **More Actions > Calculate Totals**. The **Order Summary** will change based on the charges attached to the Purchase Order.
- To process the Purchase Order, click on **More Actions > Process Payments**. The order Status changes to "Processing."



Managing Orders

Once Purchase Orders are created, either from Commerce Manager or the front-end site, they can be managed by users. To manage existing Purchase Orders, go to **Order Management** and click on **Purchase Orders** or **Purchase Orders by Status**.



Optionally, you can click on the filters below **Purchase Orders** and **Purchase Orders by Status** and you will be able to filter Purchase Orders by either the time range it was created or its current status. For example, by clicking

on **Purchase Orders by Status > NewOrder**, you will see Purchase Orders on the **Order List** that match the NewOrder status.

EPISERVER COMMERCE Orders by Status

Welcome ▾ Change Language About ▾

Order Management

- Order Search
- Purchase Orders
 - Today
 - This Week
 - This Month
 - All
- Purchase Orders By Status
 - NewOrder**
 - Submitted
 - Processing
 - Cancelled
 - Rejected
 - Shipped
- Carts
- Payment Plans (recurring)

Create New ▾ More Actions ▾

ID	Customer	Total	Status	Last Modified
57	Mary Smith	0,00	NewOrder	Today, 1:16 PM
53	Dung Le	1501,00	NewOrder	Yesterday, 10:18 AM
50	Mats Hellström	4360,99	NewOrder	5/28/2010 10:29:59 AM
45	admin	201,99	NewOrder	5/28/2010 9:11:28 AM
43	Dung Le	1501,00	NewOrder	5/27/2010 2:00:59 PM
41	Dung Le	511,98	NewOrder	5/27/2010 1:44:26 PM
39	admin	6008,00	NewOrder	5/26/2010 4:24:57 PM
36	Dung Le	6048,98	NewOrder	5/25/2010 11:24:10 AM
34	Dung Le	4368,99	NewOrder	5/24/2010 2:55:25 PM
32	Dung Le	16510,98	NewOrder	5/24/2010 10:47:09 AM
31	admin	4360,99	NewOrder	5/21/2010 9:27:14 AM
28	Peter Sunna	3028,98	NewOrder	5/20/2010 3:17:13 PM
23	a a	361,99	NewOrder	5/20/2010 12:14:48 AM

To manage an existing Purchase Order, click on the associated **ID** number.

MMERCE Order List

out ▾

Create New ▾ More Actions ▾

ID	Customer
57	Mary Smith
53	Dung Le
50	Mats Hellström
45	admin

Users can then manage the Purchase Order and add additional information, calculate the total, process the order, and other options.

MMERCE Order View

Welcome, admin
Product Version: 5.1 (build: 24)
License: ECF GS Deployment (B

Get Help For This F

More Actions ▾

- Send Notifications
- Calculate Totals
- Process Payments

NewOrder ▾
US dollar ▾
admin ▾

Billing Address: Mary Smith ▾
Affiliate: select affiliate ▾
Tracking Number (en-US):
Expiration Date (en-US):
Parent Order Id (en-US):

Allows one to specify tracking number for the order
Specify the Expiration Date for the order
This can be used to relate purchase orders to a payment plan or other order.

Order Summary:

Sub Total:	\$0.00
Tax Total:	\$0.00
Shipping Total:	\$0.00
Handling Total:	\$0.00
Discount Total:	\$0.00
TOTAL:	\$0.00

Line Items Payments Addresses Shipments

Add Line Item

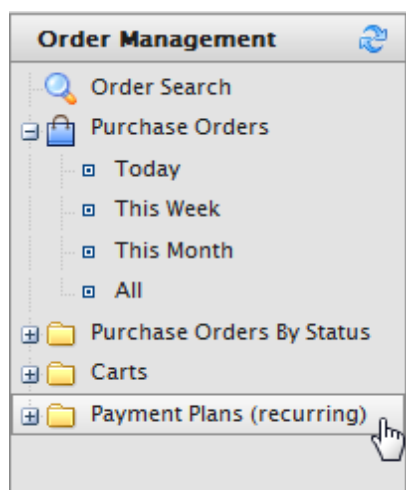
Edit Command	ID	Name	Quantity	List Price	Total
<input type="checkbox"/> X	ELCB000TQGHAW6	Apple Iphone PDA Premium Reusable LCD Screen Protector with Lint C...	1	15.00	13.00

OK Cancel

Creating a Recurring Payment Plan

Users can create recurring (subscription) Payment Plans that will regularly charge a customer on a daily, weekly, monthly, yearly, or custom basis. Individual Purchase Orders can be created and linked to the Payment Plan.

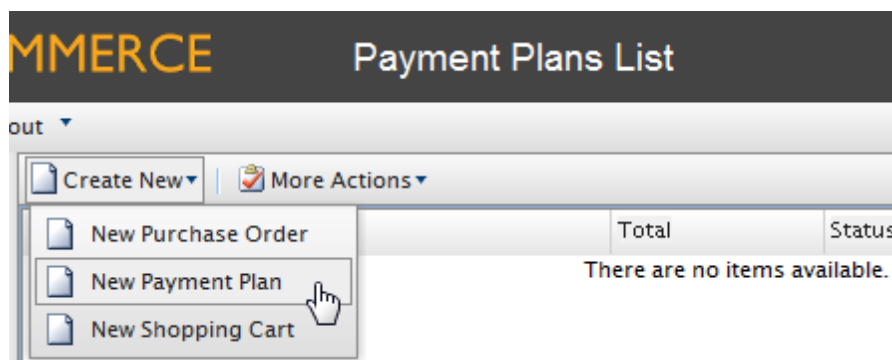
To view and create Payment Plans, go to **Order Management > Payment Plans (recurring)** to access the **Payment Plan List**.



By clicking on **Today**, **This Week**, **This Month**, you can filter the Payment Plan List based on those time ranges.

On the **Payment Plan List**, you can view and browse through existing Payment Plans.

To create a new Payment Plan, click on **Create New > New Payment Plan**. You can also create New Payment Plans from the **Order List** page, **Orders by Status** page, or **Shopping Cart List** page.



The **Payment Plan New** page is similar to the Purchase Order New page. The difference is that this form gives users options to set transaction cycles based on the type of recurring Payment Plan the customer ordered or requested. Please refer to Browsing and Creating Purchase Orders document for generational information on filling an order form.

EPiSERVER Payment Plan New

Welcome, admin
Product Version: 5.1 (build: 2)
License: ECF GS Deployment

Get Help For This Page

Status:

Currency:

Customer:

Billing Address:

Affiliate:

Plan Cycle (en-US):
Cycles mode is used to define period for recurring payments. Can be day, week, month, year or custom.

Cycle Length (en-US):
Cycle length in units of cycle mode.

Max Cycles (en-US):
Number of maximum cycles to process

Completed Cycles (en-US):
Number of completed cycles

Start Date (en-US):

End Date (en-US):

Is Plan Active (en-US): ☐ True ☒ False
Set to true if plan is active

Last Transaction Date (en-US):

Order Summary:

Sub Total:	\$0.00
Tax Total:	\$0.00
Shipping Total:	\$0.00
Handling Total:	\$0.00
Discount Total:	\$0.00
TOTAL:	\$0.00

Line Items Payments Addresses

Edit	Command	ID	Name	Quantity	List Price	Total
------	---------	----	------	----------	------------	-------

OK Cancel

Creating a Daily, Weekly, Monthly, or Yearly Payment Plan Cycle

Select the **Plan Cycle** of the Payment Plan, such as "Monthly Cycle," "Yearly Cycle."

Let's say you choose "Monthly Cycle."

- If **Cycle Length** = 1, then this payment plan will be initiated once a month. If Cycle Length = 2, then this payment plan would be initiated once every 2 months.
- **Max Cycle** - the maximum number of cycles that this payment plan will be initiated
- **Completed Cycles** - this value displays the number of times that this payment plan has been initiated

Enter in a **Start Date** and **End Date** of the Payment Plan by entering the date directly into the field or clicking on the **Calendar** icon. You can enter in a custom time into the field on the right of the **Calendar** icon. The time defaults to 12am.

Select either "True" (to enable) or "False" (to disable) for **Is Plan Active**.

Enter in the **Last Transaction Date** and time for the last payment transaction. Or leave blank and this will be updated once the first payment cycle has been initiated.

Add any **Line Items**, **Payment Types**, **Addresses**, and **Shipments** (the tab appears after saving and revisiting the Payment Plan form) to associate with the Payment Plan in the tabs below.

Click **OK** to save the Payment Plan.

Commerce Payment Plan New Welcome, admin
Product Version: 5.1 (build: 24)
License: ECF GS Deployment (EpiServe)

Status: **Order Summary:**

Currency:

Customer:

Billing Address:

Affiliate:

Plan Cycle (en-US): *Cycles mode is used to define period for recurring payments. Can be day, week, month, year or custom.*

Cycle Length (en-US):

Max Cycles (en-US): *Number of maximum cycles to process*

Completed Cycles (en-US): *Number of completed cycles*

Start Date (en-US): *Plan start date*

End Date (en-US): *Plan end date*

Is Plan Active (en-US): ☒ True ☐ False *Set to true if plan is active*

Last Transaction Date (en-US): *The date of last transaction*

Line Items

Edit Command	ID	Name	Quantity	List Price	Total
<input type="button" value="X"/>	ELCB000GKLGX46	510 Headset Charger	1	29.88	29.88

Creating a Custom Recurring Payment Plan



End users can ignore the custom payment plan options. To create a custom Payment Plan, a developer will need to create a custom service and implement code to associate it with either the "Custom1 Cycle" or "Custom2 Cycle" option shown in the drop-down.

Plan Cycle (en-US): *Cycles mode is used to define period for recurring payments. Can be day, week, month, year or custom.*

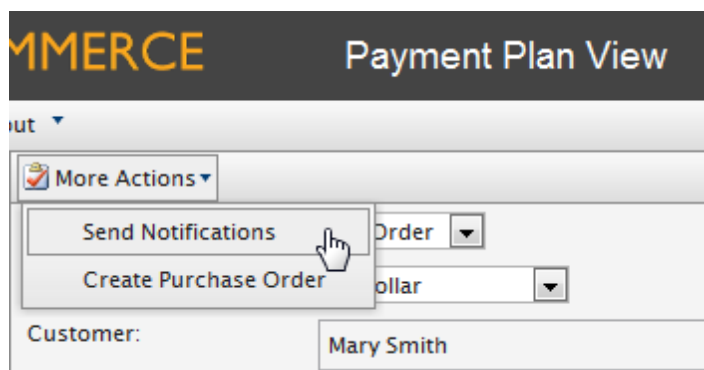
Cycle Length (en-US): *Cycle length in units of cycle mode.*

Max Cycles (en-US): *Number of maximum cycles to process*

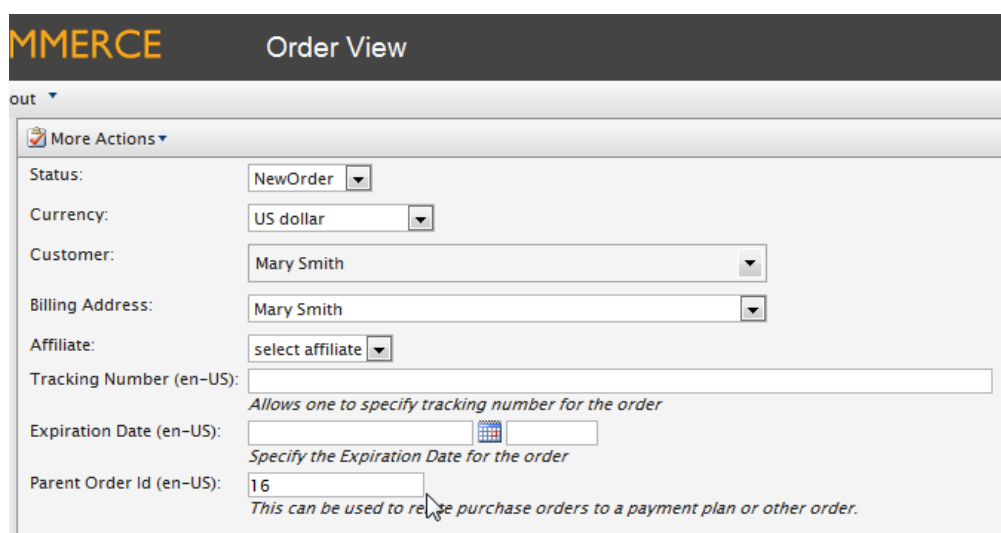
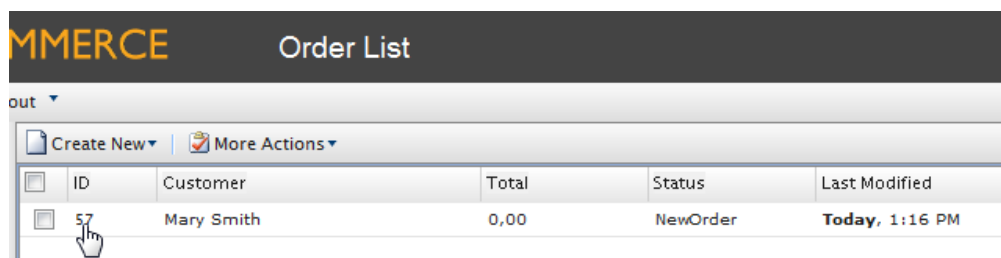
Completed Cycles (en-US): *Number of completed cycles*

Sending Notifications and Creating a Purchase Order from Payment Plan View

To send email notifications about the Payment Plan to the customer, click on **More Actions > Send Notifications**.



Users can also create a Purchase Order from this Payment Plan. The Purchase Order will appear in the **Order List** page; the Payment Plan will be the **Parent Order ID** noted in the Purchase Order View.





Viewing, Editing, and Creating Shopping Carts

As customers add items to their Shopping Cart from the front-end site, Commerce Manager users can dynamically view all current shopping carts from the Commerce Manager.

Shopping Cart

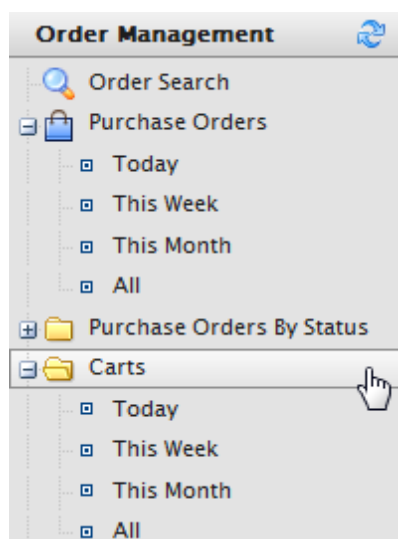
Coupon:

	Description	Each	Qty	Total
Move to wishlist Remove	 Canon PowerShot Pro Series S3 IS 6MP with 12x Image Stabilized Zoom <small>Item #: 013803063998</small> 20% Off Canon Powershot Pro Series	\$449.99 \$359.99 You save: \$90.00	1	\$359.99
Move to wishlist Remove	 Canon LAH-DC20 Conversion Lens Adapter (LA-DC58E) and Hood (LH-DC40) Set for the S5 IS, S3 IS & S2 ... <small>Item #: 013803053135</small>	\$3,999.00	1	\$3,999.00
Sub total:				\$4,358.99

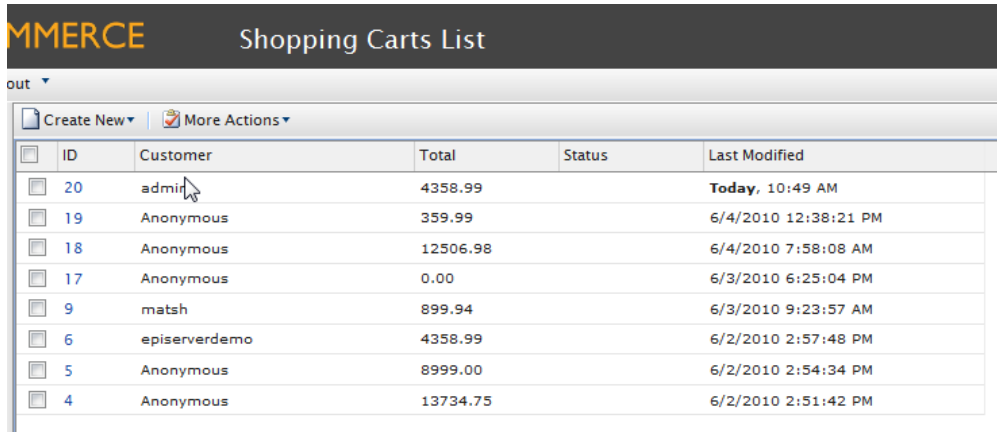
Under the **Shopping Carts List**, the Shopping Cart appears along with other active Shopping Carts (including unregistered anonymous customers) that have not checked out and completed the order.

<div> <div>MMERCE</div> <div>Shopping Carts List</div> </div>					
<div> <div>out</div> <div> <div>Create New</div> <div>More Actions</div> </div> </div>					
	ID	Customer	Total	Status	Last Modified
<input type="checkbox"/>	20	admin	4358.99		Today, 10:49 AM
<input type="checkbox"/>	19	Anonymous	359.99		6/4/2010 12:38:21 PM
<input type="checkbox"/>	18	Anonymous	12506.98		6/4/2010 7:58:08 AM
<input type="checkbox"/>	17	Anonymous	0.00		6/3/2010 6:25:04 PM
<input type="checkbox"/>	9	matsh	899.94		6/3/2010 9:23:57 AM
<input type="checkbox"/>	6	episerverdemo	4358.99		6/2/2010 2:57:48 PM
<input type="checkbox"/>	5	Anonymous	8999.00		6/2/2010 2:54:34 PM
<input type="checkbox"/>	4	Anonymous	13734.75		6/2/2010 2:51:42 PM

To view Shopping Carts, go to **Order Management > Carts**. Click on **Today**, **This Week**, or **This Month** to view only Shopping Carts Last Modified within those time ranges.



The **Shopping Cart List** allows Commerce Manager users to view existing and active Shopping Carts.

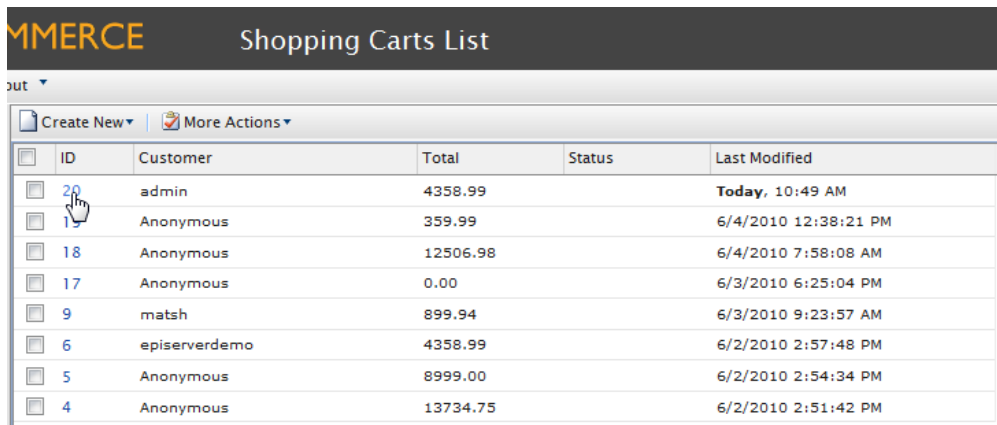


ID	Customer	Total	Status	Last Modified
20	admin	4358.99		Today, 10:49 AM
19	Anonymous	359.99		6/4/2010 12:38:21 PM
18	Anonymous	12506.98		6/4/2010 7:58:08 AM
17	Anonymous	0.00		6/3/2010 6:25:04 PM
9	matsh	899.94		6/3/2010 9:23:57 AM
6	episerverdemo	4358.99		6/2/2010 2:57:48 PM
5	Anonymous	8999.00		6/2/2010 2:54:34 PM
4	Anonymous	13734.75		6/2/2010 2:51:42 PM

Editing an Existing Shopping Cart

Commerce Manager users also have the ability to edit Shopping Carts within Commerce Manager. This is useful for completing orders manually.

To edit an existing Shopping Cart, click on the **ID** number of the Shopping Cart.



ID	Customer	Total	Status	Last Modified
20	admin	4358.99		Today, 10:49 AM
19	Anonymous	359.99		6/4/2010 12:38:21 PM
18	Anonymous	12506.98		6/4/2010 7:58:08 AM
17	Anonymous	0.00		6/3/2010 6:25:04 PM
9	matsh	899.94		6/3/2010 9:23:57 AM
6	episerverdemo	4358.99		6/2/2010 2:57:48 PM
5	Anonymous	8999.00		6/2/2010 2:54:34 PM
4	Anonymous	13734.75		6/2/2010 2:51:42 PM

The Cart View page opens showing the details of the pending Shopping Cart, very similar to the Purchase Order New form. The screenshot below shows that the **Line Items** represent the customer's Shopping Cart. Additional details such as **Payments**, **Addresses**, **Shipments**, and **Billing Address** can be edited in the **Cart View**.

COMMERCE Cart View Welcome, Manager
Product Version: 10.0.0
License: ECF G5

More Actions ▾

Status:

Currency:

Customer:

Billing Address:

Affiliate:

Order Summary:

Sub Total:	\$4,358.99
Tax Total:	\$0.00
Shipping Total:	\$0.00
Handling Total:	\$0.00
Discount Total:	\$0.00
TOTAL:	\$4,358.99

Line Items Payments Addresses Shipments

Add Line Item

Edit Command	ID	Name	Quantity	List Price	Total
	013803063998	Canon PowerShot Pro Series S3 IS 6MP with 12x Image Stabilized Zoom	1	449.99	359.99
	013803053135	Canon LAH-DC20 Conversion Lens Adapter (LA-DC58E) and Hood (LH-DC40) Set for the S5 IS, S3 IS & S2 ...	1	3999.00	3999.00

OK Cancel

By adding a **Line Item**, the Shopping Cart on the front-end site should render appropriately.

Line Items Payments Addresses Shipments

Add Line Item

Edit Command	ID	Name	Quantity	List Price	Total
	013803063998	Canon PowerShot Pro Series S3 IS 6MP with 12x Image Stabilized Zoom	1	449.99	359.99
	013803053135	Canon LAH-DC20 Conversion Lens Adapter (LA-DC58E) and Hood (LH-DC40) Set for the S5 IS, S3 IS & S2 ...	1	3999.00	3999.00
	ELCB000WKS8QG6	Headphone Adapter for Apple iPhone Recessed Jack, 3.5mm Male Female...	1	14.95	14.95

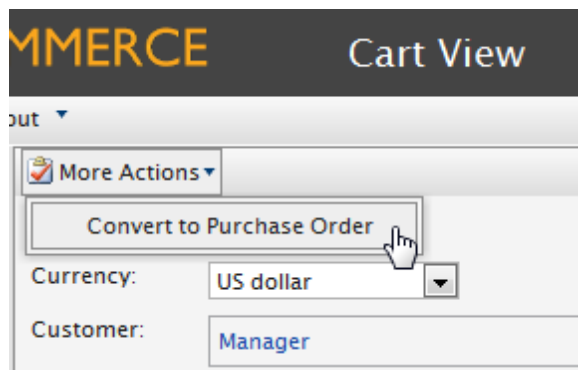
OK Cancel

Shopping Cart

Coupon:

	Description	Each	Qty	Total
Move to wishlist Remove	Canon PowerShot Pro Series S3 IS 6MP with 12x Image Stabilized Zoom Item #: 013803063998 20% Off Canon Powershot Pro Series	\$449.99 \$359.99 You save: \$90.00	1 ▾	\$359.99
Move to wishlist Remove	Canon LAH-DC20 Conversion Lens Adapter (LA-DC58E) and Hood (LH-DC40) Set for the S5 IS, S3 IS & S2 ... Item #: 013803053135	\$3,999.00	1 ▾	\$3,999.00
Move to wishlist Remove	Headphone Adapter for Apple iPhone Recessed Jack, 3.5mm Male Female Extension Plug - Black Item #: ELCB000WKS8QG6	\$14.95	1 ▾	\$14.95

The Shopping Cart can be converted to a Purchase Order by clicking on **More Actions > Convert to Purchase Order**.



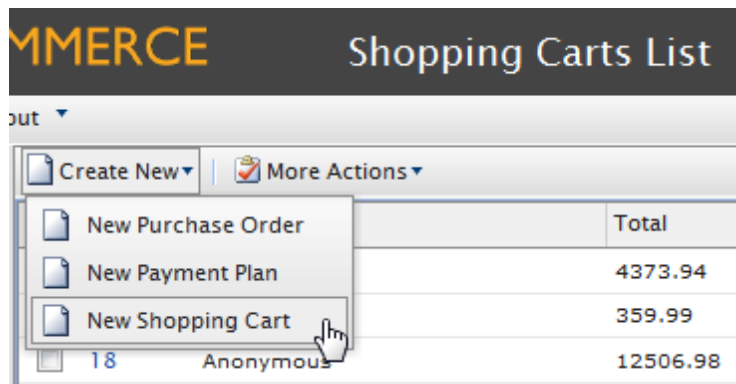
The Purchase Order appears as a **NewOrder** in the **Order List** for further processing.

ID	Customer	Total	Status	Last Modified
2	Manager	4373.94	NewOrder	Today, 11:52 AM
10		729.98	NewOrder	6/3/2010 4:30:43 PM
15	Manager	369.99	NewOrder	6/3/2010 4:29:12 PM
12		4848.45	NewOrder	6/3/2010 1:30:10 PM
8		369.99	NewOrder	6/2/2010 4:54:06 PM
3	Kalle Andersson	8208.44	Shipped	6/2/2010 1:25:56 PM

Creating a Shopping Cart

Users can also create a Shopping Cart for registered customers (it is not possible to create a Shopping Cart for anonymous customers).

Click on **Create New > New Shopping Cart** to view the **Shopping Cart New** page.



Commerce Manager Shopping Cart New

Welcome, Manager
Product Version: 10.0.0.0
License: ECF G5

Status:

Currency:

Customer:

Billing Address:

Affiliate:

Order Summary:

Sub Total:	\$0.00
Tax Total:	\$0.00
Shipping Total:	\$0.00
Handling Total:	\$0.00
Discount Total:	\$0.00
TOTAL:	\$0.00

Line Items Payments Addresses

Add Line Item

Edit Command	ID	Name	Quantity	List Price	Total
<input type="button" value="OK"/> <input type="button" value="Cancel"/>					

Enter in any **Line Items**, **Payment Types**, and **Addresses** to associate with the **Billing Address** drop-down menu. Select the **Status**, **Currency**, **Customer**, and optionally an **Affiliate**.

Commerce Manager Shopping Cart New

Welcome, Manager
Product Version: 10.0.0.0
License: ECF G5

Status:

Currency:

Customer:

Billing Address:

Affiliate:

Order Summary:

Sub Total:	\$0.00
Tax Total:	\$0.00
Shipping Total:	\$0.00
Handling Total:	\$0.00
Discount Total:	\$0.00
TOTAL:	\$0.00

Line Items Payments Addresses

Add Line Item

Edit Command	ID	Name	Quantity	List Price	Total
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	ELCB000FOM68A6	Plantronics Voyager 510 - Bluetooth Headset Carrying Case	1	19.99	19.99

Click **OK** when done.




To edit **Shipments** from the Shipments tab, go back to edit the Shopping Cart. The Shipments Tab appears next to the **Addresses** tab.

The Line Items appear in the customer Shopping Cart on the front-end site.

Shopping Cart

Coupon:

	Description	Each	Qty	Total
Move to wishlist Remove	 Plantronics Voyager 510 - Bluetooth Headset Carrying Case <small>Item #: ELCB000FOM68A6</small>	\$19.99	1 <input type="button" value="v"/>	\$19.99
Sub total:				\$19.99

Reporting

Various reports are included out-of-the-box to help management and other personnel to make informed decisions.

The default reports include:

- **Sales Report** - this report provides an overview of a site's sales performance over a period of time
- **Shipping Report** - this report provides the shipping method, number of orders and total shipping cost over a period of time
- **Best Sellers Report** this report is used to determine which products sold the most in terms of quantity and total revenue over a period of time
- **Low Stock Report** - this report is used to determine which products are running low in inventory. If a product's inventory is less than its reorder minimum quantity, it will be included in this report.

The display of these reports can be generated by Start and End date/time and filtered by Day/Month/Year. In addition, they can be exported to Excel or PDF format, or printed.

SQL Reporting Services

Since the Commerce Manager utilizes SQL databases, custom reports can be created using **Microsoft SQL Server Reporting Services**. Reporting Services provides a complete, server-based platform designed to support a wide variety of reporting needs enabling organizations to deliver relevant information where needed across the entire enterprise. Read through the resources below to get familiarized with Reporting Services and how you can create custom SQL reports to display data from your EPiServer Commerce site.

- Reporting Services Features
- Using SQL 2008 Reporting Services and Report Builder 2.0 to Create Custom SQL Reports
- Download Report Builder 2.0
- Reporting Services and ReportViewer Controls in Visual Studio
- Reporting Services Components and Tools
- Reporting Services Configuration How-To Topics

Generating and Customizing Reports

By default, users can generate **Sales**, **Shipping**, **Best Sellers**, and **Low Stock Reports** about the site. Reports can be customized/filtered and exported to suit the needs of the user.

To generate a report, click on **Reporting > Sales > Sales Report/Shipping Report** or **Reporting > Products > Best Sellers Report/Low Stock Report**.

Period	Num. Of Orders	Items Ordered	Sub Total	Tax	Shipping	Discounts	Total	Invoiced
05/08/2010	0	0	0	0	0	0	0	0
05/09/2010	0	0	0	0	0	0	0	0
05/10/2010	0	0	0	0	0	0	0	0
05/11/2010	0	0	0	0	0	0	0	0
05/12/2010	0	0	0	0	0	0	0	0
05/13/2010	0	0	0	0	0	0	0	0
05/14/2010	0	0	0	0	0	0	0	0

Customizing/Filtering and Exporting Reports

Users can select the Start Date and End Date ranges and time as well as group the Report data by "Day," "Month" or "Year." Once done, click on **Apply Filter**.

An example **Sales Report** with a date range from 5/1/2010 at 6am to 6/7/2010 at 12pm **Grouped By Month** is in the screenshow below.

Period	Num. Of Orders	Items Ordered	Sub Total	Tax	Shipping	Discounts	Total	Invoiced
May, 2010	0	0	0	0	0	0	0	0
June, 2010	5	10	41,318.61	0.00	52.00	0.00	41,370.61	41,370.61
	5	10	41,318.61	0.00	52.00	0.00	41,370.61	41,370.61

Users can also change the zoom size of the report by clicking on the drop-down menu with "100%." Also, paging controls are available next to the zoom drop-down menu. Users can also reload the report by clicking on the **Refresh** icon.

To **Export** a report to a file format for sharing with others, click on the drop-down that says "Select a format." Select a format from the drop-down menu, such as Excel or PDF. Click on **Export** and **Open** or **Save** the file once the prompt appears.

Business Foundation

It is a new generation of Meta Data Engine that allows no-code customization of the Data Model. We enhanced our Meta Model in this new version. In the previous version you could only add fields to the existing meta objects and now you can define new objects and relations between them.

The form is fully customizable so you can define layout and specify which fields you want to display. You can also work with system fields which was previously impossible.

The current implementation of Business Foundation only supports the Customer Management and Asset Management systems. Support for other subsystems such as Order and Catalog management is planned for the future.

Customizing Existing Business Objects

Out of the box, Commerce Manager includes Business Objects that can be edited and customized. Customizing existing business objects is a good starting point for end users to model business objects for their needs. However, pre-existing business objects such as "Address" and "Organization" cannot be deleted, only edited.



The current implementation of Business Foundation only supports the Customer and Asset Management subsystems. Support for other subsystems such as Order and Catalog are planned for future releases.

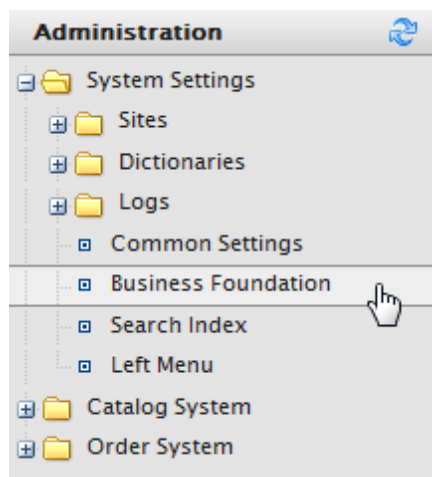
Fields in the Business Foundation

This section covers how to add or edit different types of data fields within an existing business object.

Adding Fields to Business Objects

Existing Business Foundation Objects can be customized to have additional data entry fields. For example, you can add fields to the New Credit Card form built-in to Commerce Manager.

To add new fields to Business Object, click on Administration, expand System Settings, and click on Business Foundation to access the list of Business Foundation Objects.



In this example, the **CreditCard Business Object** is used.

MERCE

Configuration

Welcome, Manager

Product Version: 5.1 (build: 24)

License: ECF G5 Deployment (EpiServer)

Get Help For This Page

Create New

Export/Import

Show: All

System Name	Friendly Name	Plural Name	Type
Address	Address	Address	Info
Contact	Contact	Contact	Info
CreditCard	Credit Card	CreditCard	Info
CustomizationItem	Customization Item	Customization Items	Info
CustomizationItemArgument	Customization Item Argument	Customization Item Arguments	Info
CustomPage	Custom Page	Custom Pages	Info
Folder	Folder	Folder	Info
FolderElement	FolderElement	FolderElement	Info
ImageFolderElement	ImageFolderElement	ImageFolderElement	Card
Member	Member	Member	Info
NewObject	NewObject	NewObject	Info
Organization	Organization	Organization	Info
PdfFolderElement	PdfFolderElement	PdfFolderElement	Card
RecentReferenceHistory	User Recent Reference	User Recent References	Info

If you want to add a new field to this CreditCard Business Object (or any other Business Object), click on **New Field**.

Business Object Customization			
System Name:	CreditCard	Friendly Name:	Credit Card
Type:	Business Object	Plural Name:	CreditCard
<div> <div>Fields</div> <div>1:N Relations</div> <div>N:1 Relations</div> <div>N:N Relations</div> <div>Forms</div> <div>System Views</div> </div>			
System Name	Friendly Name	Type	
Address	Address	Text (ReferencedField)	

The **New Field** form allows you to specify the type of data field you want created for the Business Object.

New Field		Back
Business Object:	Credit Card	
Field Name:	CustomerServicePhoneNumber	
Friendly Name:	CustomerServicePhoneNumber	
Description:		
Field Type:	String	
Format:	Text	
Maximum Length:	100	
<input type="checkbox"/> Unique value		
<input checked="" type="checkbox"/> Allow Nulls		
Add Field To:	<input checked="" type="checkbox"/> Edit Form <input checked="" type="checkbox"/> View Form <input checked="" type="checkbox"/> Short Info Form	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

1. Enter in a **Field Name**, which is the system ID or name of the field. The Field Name that is entered auto-populates the Friendly Name field.
2. Since the **Friendly Name** is autopopulated based on the Field Name, you can either keep the name the same or change it. The Friendly Name is what appears on a form (such as the Credit Card form)
3. You can optionally enter in a **Description** that appears below the data entry field to explain the field to the user.
4. Checkmark on or off to **Allow Nulls** for this field
5. You can choose to **Add Field To** an existing Form. Checkmark all that apply.
6. Enter in a **Field Type**. For further explanation of each Field Type, refer to the Reference Section on the bottom of this page. In this example, a **String** field type is used.

a. The **Format** drop down menu and options depend on your Field Type selection. In this example, **Text** is selected as the field format, with a **Maximum Length** of 100. **Unique** value is left unchecked.

7. Once done, click **Save**. The new field appears on the list of fields.

CreditCardId	Id	Guid
CreditCardNumber	Card Number	Text
CustomerServicePhoneNumber	Customer Service Phone Number	Text
ExpirationMonth	Expiration Month	Integer

To verify if the new field appears, check the form associated with that new field. Since this example customized the **New Credit Card** form, you will see that the new field appears.

Editing Fields of Business Objects

Fields created by the user can be edited. To edit a field, click on the **Edit** icon.



Fields that are locked cannot be edited.

CreditCardNumber	Card Number	Text
CustomerServicePhoneNumber	Customer Service Phone Number	Text
ExpirationMonth	Expiration Month	Integer
ExpirationYear	Expiration Year	Integer

The only attributes that can be changed are Friendly Names and Descriptions. Once those changes are made, click **Save**.

Relations in the Business Foundation

In order to track and record relevant data, business objects must be related to other objects, whether they are "1 to many," "many to 1," "many to many." Currently, business objects only affect the customer and asset management subsystems.

- **1 to Many Relationship** - 1 object can be associated or related with multiple object-related data. For example, one organization can be associated with multiple contracts.
- **Many to 1 Relationship** - Multiple object-related data can be associated or related with a single object. For example, multiple contacts can be related to a single organization.
- **Many to Many Relationship** - Multiple object-related data can be associated or related with multiple objects. For example, different SKUs can be associated with one or more Warehouses for tracking and storage.

Adding a 1 to Many Relation

Business Foundation objects allow a user to specify "1 to many" relationships. For example, if you have one organization, you can relate many types of data to that organization, such as multiple contacts, addresses, or organizational units or divisions within an organization. Within a 1:N relationship, the business object you selected will be "1."

In the example below, 1 = Organization and N = related objects such as Address, Contact, CreditCard, etc.

To add a 1 to many relationship to a business object, you will need to create a new business object or use an existing one. On the Business Object Customization page, click on **1:N Relations**.

Business Object Customization | New Field | Edit | Publish | Back To List

System Name: CreditCard | **Friendly Name:** Credit Card
Type: Business Object | **Plural Name:** CreditCard

Fields	1:N Relations	N:1 Relations	N:N Relations	Forms	System Views
System Name					
Address	Address				Text (ReferencedField)
AddressId	Address				Reference
CardType	Type				CreditCardType
Contact	Contact				Text (ReferencedField)
ContactId	Contact				Reference
Created	Created				DateTime

Click on **New Relation "one to many"** to create a new relation.

Business Object Customization | New Field | Edit | Publish | Back To List

System Name: Organization | **Friendly Name:** Organization
Type: Business Object | **Plural Name:** Organization

Fields	1:N Relations	N:1 Relations	N:N Relations	Forms	System Views
Name	Primary Object				
Address	Organization				Address
Contact	Organization				Contact
CreditCard	Organization				Credit Card
Organization	Organization				Organization

[New Relation "one to many"](#)

Under **General Info**, the Primary Object Organization is automatically set to Organization.

1. Select a **Related Object** to relate an the Organization object in the dropdown.
2. The Object section below General Info will have a different title based on Related Object you selected. For example, if you selected "Address," the title would be "Object 'Address'".
3. Enter in a **Field Name** and **Friendly Name**. They are autopopulated already using the system name of the business object.
Both names must be unique and not be the same as an existing field. The **Field Name** cannot contain spaces or special characters, only letters, numbers, and underscores.
4. Checkmark the box **Allow Nulls** if you do not want this to be a required field the user fill in while editing a form. Otherwise, uncheck the box to make it a required field.
5. Under **Add Field To**, checkmark the Forms you want the field to render in, such as the Edit Form (to enter and submit information) or View Form (read information only).
6. Under the Object "Name of Primary Object" section, select a Display region in the dropdown box. Additional options such as **Display Text** and **Display Order** will appear based on your dropdown menu selection.
7. Once all the relevant information is entered, click on **Save**.

Relation 1:N

General Info

Primary Object: Organization

Related Object: Address

Object "Address"

Field Name: Organization

Friendly Name: Organization

☒ Allow Nulls

Add Field To:

☒ Edit Form
 ☒ View Form
 ☒ Short Info Form

Object "Organization"

Display Region: [Not Set]



The Related Object will have the Primary Object appear under the opposite relationship (N:1) on its configuration form. For instance, if organization is the Primary Object and the Related Object is Address, the relationship is automatically generated under the **N:1** tab in **Address**.

Adding a Many to 1 Relation

Users can also relate business objects via a "Many to 1" relationship. For example, you can relate multiple contacts to a single organization or unit.

In the example below, N = Organization and 1 = related objects such as ParentId, PrimaryContactId etc.

To create **Many to 1 relationships**, click on a business object and click on the **N:1 Relations** tab.

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Business Object Customization [New Field](#) [Edit](#) [Publish](#) [Back To List](#)

System Name: Organization **Friendly Name:** Organization
Type: Business Object **Plural Name:** Organization

Fields **1:N Relations** **N:1 Relations** **N:N Relations** **Forms** **System Views**

System Name	Friendly Name	Type
BusinessCategory	Business Category	BusinessCategory
Created	Created	DateTime
CreatorId	Creator	Guid

Click on **New Relation "Many to one"** to create a new relationship.

Business Object Customization [New Field](#) [Edit](#) [Publish](#) [Back To List](#)

System Name: Organization **Friendly Name:** Organization
Type: Business Object **Plural Name:** Organization

Fields **1:N Relations** **N:1 Relations** **N:N Relations** **Forms** **System Views**

[New Relation "many to one"](#)

System Name	Name	Primary Object	Related Object
ParentId	Parent	Organization	Organization
PrimaryContactId	Primary Contact	Contact	Organization

The Relation N:1 form is very similar to the Relation 1:N form, except you can select the Primary Object from the dropdown, whereas the Related Object defaults to the name of the Business Object.

Under **General Info**, the Primary Object Organization is automatically set to Organization.

1. Select a **Primary Object** to relate an the Organization object in the dropdown. The Object section below General Info will have a different title based on the Related Object name.
2. Enter in a Field Name and Friendly Name. They are autopopulated already using the system name of the business object.
Both names must be unique and not be the same as an existing field. The **Field Name** cannot contain spaces or special characters, only letters, numbers, and underscores.
3. Checkmark the box **Allow Nulls** if you do not want this to be a required field the user fill in while editing a form. Otherwise, uncheck the box to make it a required field.
4. Under **Add Field To**, checkmark the Forms you want the field to render in, such as the Edit Form (to enter and submit information) or View Form (read information only).
5. Under the Object "Name of Primary Object" section, select a Display region in the dropdown box. Additional options such as **Display Text** and **Display Order** will appear based on your dropdown menu selection.
6. Once all the relevant information is entered, click on **Save**.

Relation N:1

General Info

Primary Object: Address

Related Object: Organization

Object "Organization"

Field Name: Address

Friendly Name: Address

☒ Allow Nulls

Add Field To:

☒ Edit Form

☒ View Form

☒ Short Info Form

☒ System View (All organizations)

Object "Address"

Display Region: [Not Set]



Like an 1:N relationship, if you setup a N:1 relationship with a Primary and Related Object, a 1:N relationship is automatically generated for the Primary Object under the **1:N** tab.

Adding a Many to Many Relation

Users can also create Many to Many relationships with business objects. For example, many to many relationships help to track different SKUs and their inventory levels with different warehouse locations. Another example is multiple contacts a part of multiple organizations. A Many to Many relationship between two objects is also referred to as a **Bridge**.

In the example both Organization and Organization_Contact = N.

To create a **Many to Many relationship**, click on a business object and then click on the **N:N Relations** tab.

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Business Object Customization [New Field](#) | [Edit](#) | [Publish](#) | [Back To List](#)

System Name: Organization **Friendly Name:** Organization

Type: Business Object **Plural Name:** Organization

Fields	1:N Relations	N:1 Relations	N:N Relations	Forms	System Views
System Name			Friendly Name		Type
BusinessCategory			Business Category		BusinessCategory
Created			Created		DateTime
CreatorId			Creator		Guid
Description			Description		LongText
Modified			Modified		DateTime

Click on **New Relation "many to many"** to create a new N:N relationship.

Business Object Customization

System Name: Organization Friendly Name: Organization

Type: Business Object Plural Name: Organization

Fields 1:N Relations N:1 Relations **N:N Relations** Forms System Views

New Relation "many to many"

The Relation N:N is much different compared to the Relation 1:N/N:1 forms.

The **Current Object** defaults to the name of the Business Object you are editing

Select a **Related Object** from the dropdown menu

The **Relation Name** is autopopulated by (Current Object Name_Related Object Name). Change this name if you wish, but you cannot have spaces or special characters, only letters, numbers, and underscores.

Enter in a **Friendly Name**, which can have special characters and spaces. Make sure both Relation and Friendly Names are unique do not already exist.

Under Current Object, select a **Display Region** where the field will appear

Under Related Object, select a **Display Region** where the field will appear

Once all the relevant information is entered, click on **Save**.

Relation N:N

General Info

Current Object: SKUs

Related Object: SKU_Warehouse

Relation Name: SKUs_Warehouse

Friendly Name: SKUsSKUs Warehouses

Current Object (SKUs)

Display Region: Information

Display Text: SKUs Warehouses

Display Order: 10000

Related Object (SKU_Warehouse)

Display Region: Information

Display Text: SKUs

Display Order: 10000

Save Cancel



A many to many relationship is automatically generated for the related object when you click on its N:N tab under its configuration form.

Forms in the Business Foundation

Forms dictate how fields are presented to the user when view and editing information. This section shows you can customize forms for viewing and editing by end users.

Customizing an Existing Form

Every field is associated with a Form. Each Business Object is associated with one or more types of forms. The common types of forms found in Commerce Manager are the **Edit Forms**, **Short Info Forms**, and **View Forms**. For example, the New Credit Card form looks like this:

By editing the form, you can change the layout, add new fields and sections, and more.

To edit an existing form, click on a **Business Object** and click on the **Forms** tab to see the list of associated forms.

Click on the **Edit** icon next to the form you want to make changes to. The form customization window pops up.

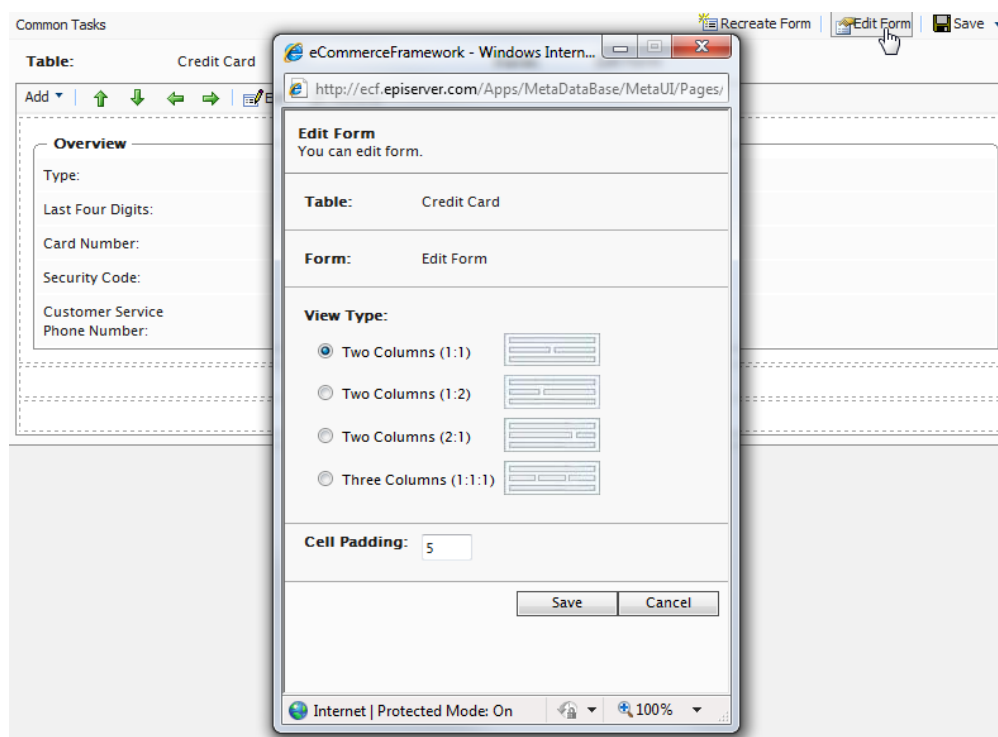
There are various functions available to edit and customize a form.

Editing the Layout of a Form

You can change the layout and the fields that appear on the form.

1. Click on **Edit Form**.
 - a. Select a **View Type** (or the layout of the form). You have a choice between a Two Column (1:1, 1:2, 2:1), or Three Column (1:1:1) layout.
 - b. Enter in a pixel value for the **Cell Padding**, or spaces between each cell.
2. Click **Save** to confirm your changes.

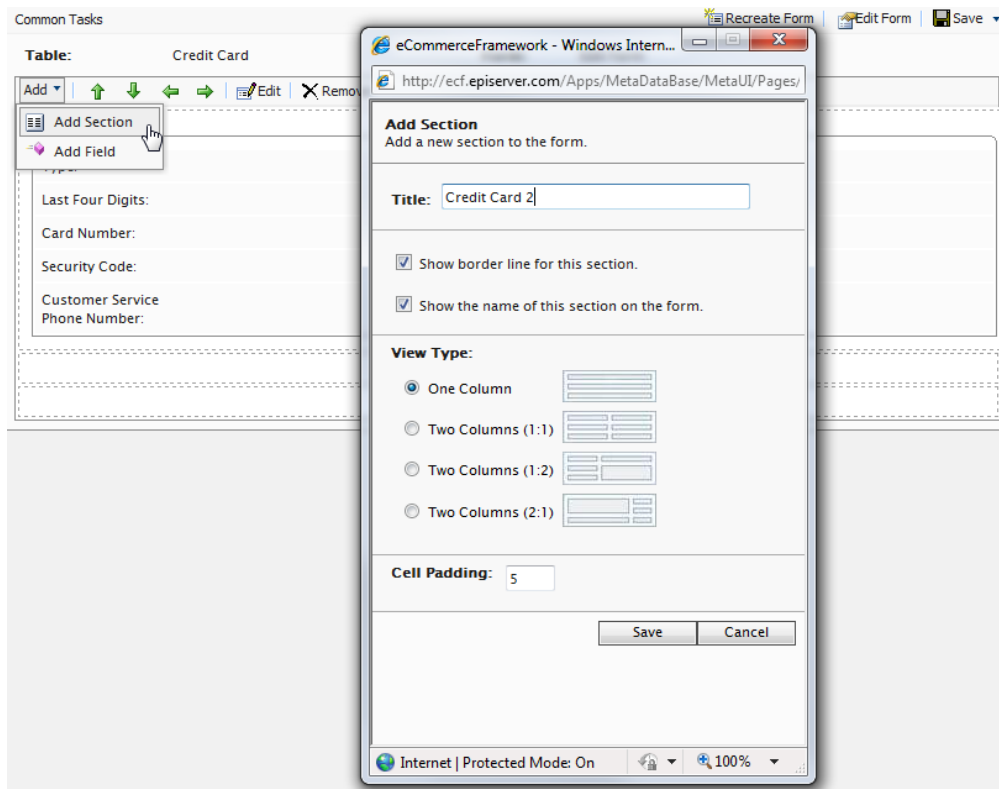
This example uses a Two Column (1:1) layout.



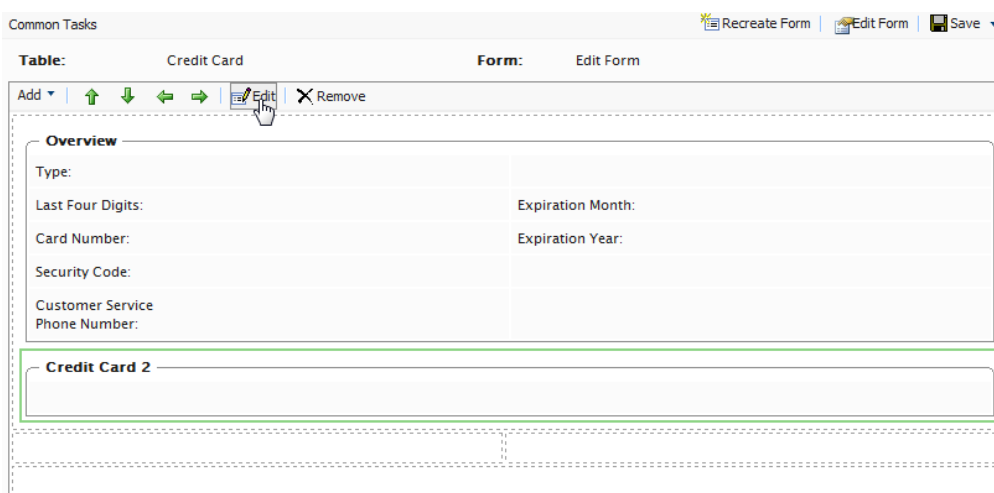
Adding Sections and Fields

Once your layout is set, you can add additional sections and/or additional fields.

1. Click on **Add --> Add Section** to add a new section. Adding sections allows you to separate and divide groups of fields on a form with their own header and border.
2. Enter in a **Title** for the section.
3. Checkmark the box next to "Show border line for this section" if you want to show the border around section. Otherwise, uncheck the box to hide the border.
4. Checkmark "Show the name of this section on the form" if you want to show the title of the section on the form. Otherwise, uncheck the box to hide the title.
5. Select a **View Type** or layout of the section: One Column, Two Columns (1:1), Two Columns (1:2), Two Columns (2:1)
6. Enter a numeric pixel value for **Cell Padding** or amount of space between each cell in the section.
7. Click **Save** to save your changes.



You can edit a section by clicking on a section and click on **Edit**.



Within each section are fields. You can add new fields to a specific section by highlighting the section and then by clicking **Add --> Edit**.

Common Tasks

Table: Credit Card Form: Edit Form

Recreate Form Edit Form Save

Add Add Section Add Field

Last Four Digits: Expiration Month:

Card Number: Expiration Year:

Security Code:

Customer Service Phone Number:

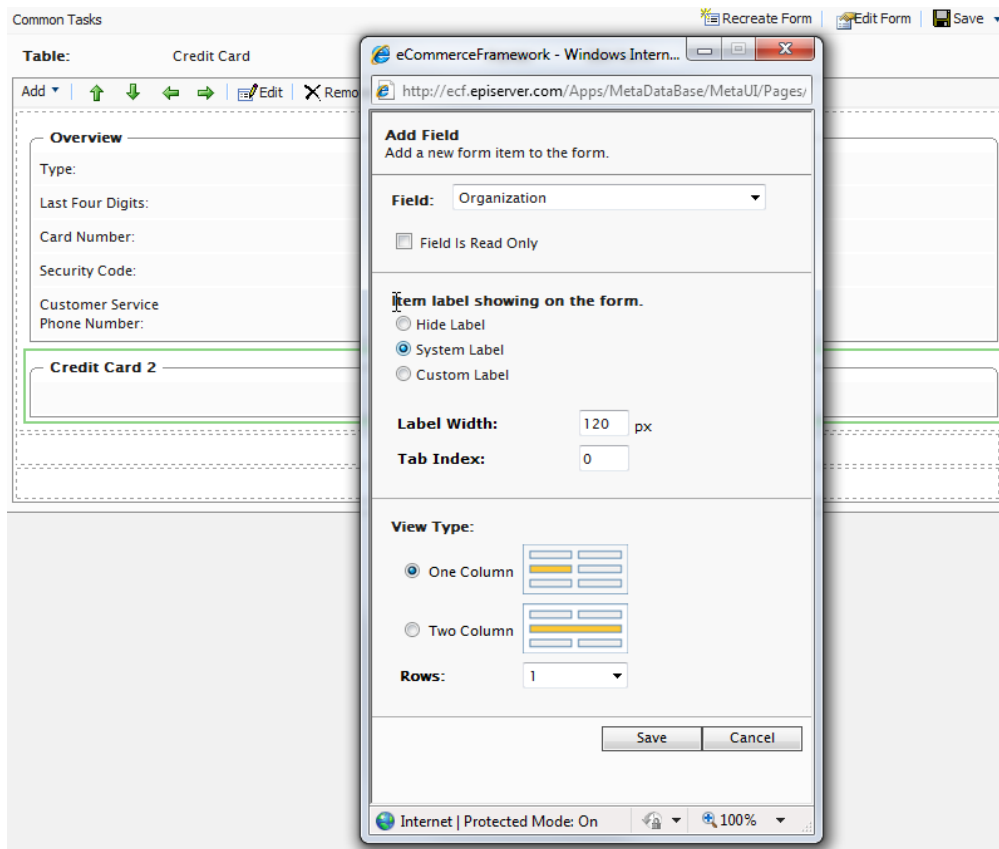
Credit Card 2

Last Four Digits:

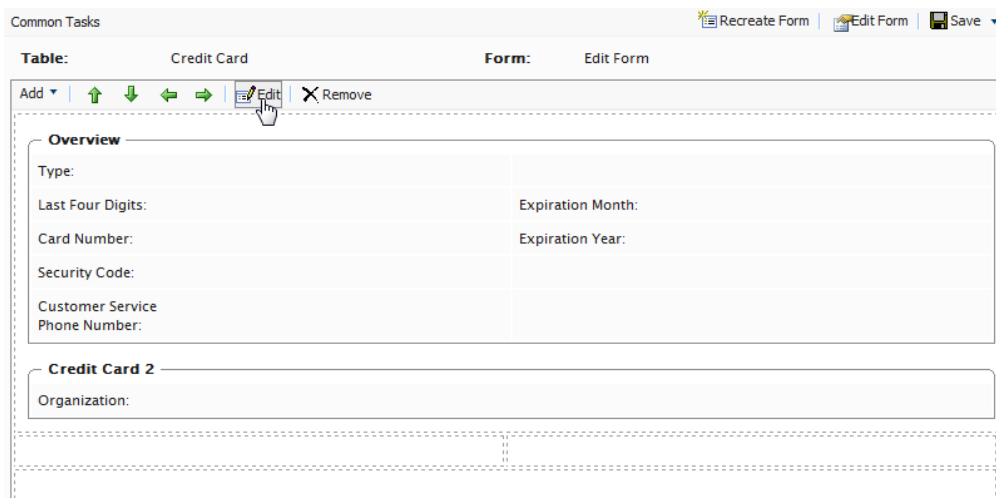
Select an existing associated field in the dropdown menu.

a. Checkmark the "Field is Read Only" box if you want the field to be unavailable for edit. When you see the rendered form, the field will be grayed out.

1. Select the "Item label showing on the form."
2.
 - **Hide Label:** No label appears next to the text box
 - **System Label:** Shows the system name next text box
 - **Custom Label:** Enter in a custom label
3. Enter in a **Label Width** numerical value. Default is 120px.
4. **Tab Index:** enter an index for the tab.
5. Select a **View Type**, either a One Column or Two Column. In the dropdown, enter in the number of text box rows, up to 3.
6. Click **Save** to add the field to the section.



To edit a field, click and highlight the field and click on **Edit** to change your previous settings.



You can re-arrange fields on a form but using the arrow controls on menu bar. Highlight the field and then click on the directional arrow you want the field to move to.

Common Tasks Recreate Form Edit Form Save

Table: Credit Card **Form:** Edit Form

Add ↑ ↓ ← → Edit Remove

Overview

Type:

Last Four Digits: Expiration Month:

Card Number: Expiration Year:

Security Code:

Customer Service Phone Number:

Credit Card 2

Organization:

In this example, the "Security Code" field is moved to the right where the "Customer Service Phone Number" field is placed by clicking on the right directional arrow. Fields are moved from cell to cell within a section.

Common Tasks Recreate Form Edit Form Save

Table: Credit Card **Form:** Edit Form

Add ↑ ↓ ← → Edit Remove

Overview

Type:

Last Four Digits: Expiration Month:

Card Number: Expiration Year:

Security Code:

Customer Service Phone Number:

Credit Card 2

Organization:

Deleting Sections and Fields

To delete a section or field, highlight either one and click on **Remove**. A popup will appear. Click **OK** to confirm deletion. Otherwise, click **Cancel**.

Common Tasks Recreate Form Edit Form Save

Table: Credit Card **Form:** Edit Form

Add ↑ ↓ ← → Edit Remove

Overview

Type:

Last Four Digits: Expiration Month:

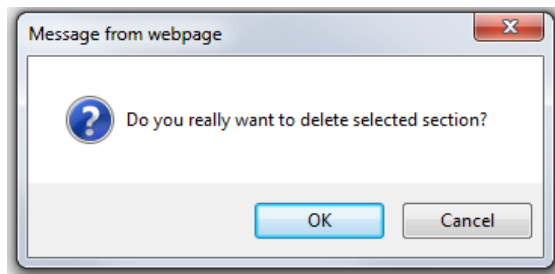
Card Number: Expiration Year:

Security Code:

Customer Service Phone Number:

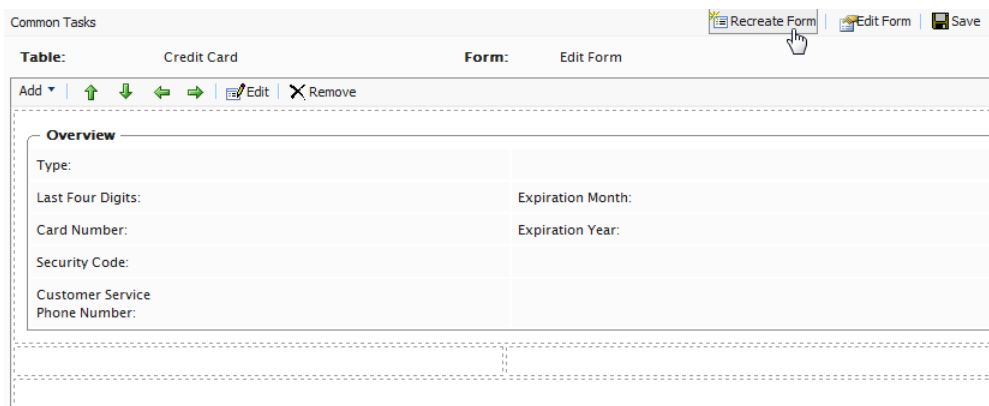
Credit Card 2

Organization:

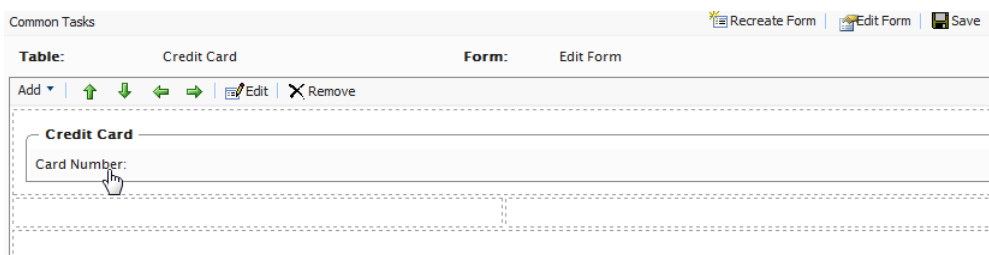


Recreating a Form

Recreating a form allows a user to create a form from scratch with a single field rather than customize a form with all fields already in place. Click on **Recreate Form** on the upper right corner of the window.



A popup will appear. Click on **OK** to recreate the form. Otherwise, click **Cancel**. Once you confirm, the fields will clear from the form except for the required field.



Saving a Customized Form

Once you are done with your changes, click on **Save** on the upper right corner of the window. To save and close the window at the same time, click the down-arrow next on the Save button and on the dropdown click **Save and close**.

The screenshot shows the 'Common Tasks' window with a toolbar at the top containing 'Recreate Form', 'Edit Form', and 'Save'. Below the toolbar, a table titled 'Credit Card' is displayed. The table has columns for 'Type', 'Last Four Digits', 'Card Number', 'Security Code', 'Customer Service Phone Number', 'Expiration Month', and 'Expiration Year'. The 'Edit Form' button is highlighted, and a dropdown menu is open showing 'Save' and 'Save and close' options.

Once those changes are saved, the form you edited will render based on your configuration. For example, here is the customized Credit Card edit form an end user sees.

The screenshot shows the 'New Credit Card' form. The 'Overview' section contains the following fields: 'Type' (a dropdown menu with 'Visa' selected), 'Last Four Digits' (a text input field), 'Card Number' (a text input field), 'Customer Service Phone Number' (a text input field), 'Expiration Month' (a dropdown menu with '[No value]' selected), 'Expiration Year' (a dropdown menu with '[No value]' selected), and 'Security Code' (a text input field). Below the 'Overview' section is a section titled 'Credit Card 2' which contains an 'Organization' field with a placeholder text: `{Customer:CreditCard_mf_Organization_Description}`.

Creating a New Business Object

Creating new business objects allows users to extend customer and asset forms for tracking and relating different types of data. Business Objects could be related in a "one to many," "many to one," or "many to many" relationship.

This section covers an example of how to create and publish a Contract business object using a "many to one" relationship.

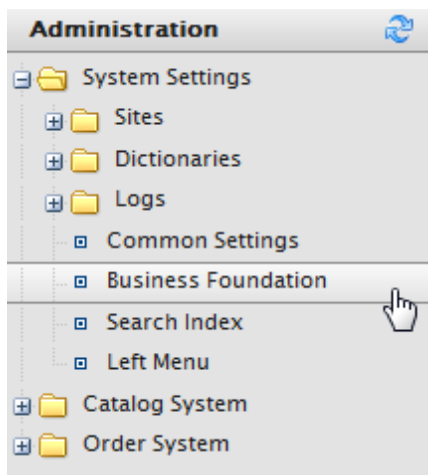
Scenario - Creating and Publishing a Contract Business Object

This is a basic step-by-step guide on how to create and publish a simple Contract Business Object for relating multiple contracts to a single organization.

Creating a New Contract Object

New Business Objects can be created to suits a multitude of business purposes. This example shows you how to create a Contract business object.

To add new fields to Business Object, click on **Administration**, expand **System Settings**, and click on **Business Foundation** to access the **Business Foundation Configuration** page.



Click on **Create New** and on the dropdown click on **New Business Object**. The **New Business Object** form appears. Enter all relevant information.

 A screenshot of the 'New Business Object' configuration form. The form has a header bar with 'MERCE Configuration' and user information. Below the header, there's a 'New Business Object' section with a 'Back To List' link. The form is divided into two main sections: 'Base Info' and 'Field Info'. In 'Base Info', the 'System Name' field contains 'Contract', and the 'Friendly Name' and 'Plural Name' fields are also populated with 'Contract Name' and 'Contract' respectively. There is a 'Supports Extensions' checkbox which is unchecked. In 'Field Info', the 'System Name' field also contains 'Contract', the 'Friendly Name' field contains 'Contract Name', and the 'Maximum Length' field contains '100'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Base Info

- **System Name:** name of the Business Object (once you input a name, the Friendly Name and Plural Name fields are autopopulated)
- **Friendly Name:** alternative to the System Name
- **Plural Name:** plural version of the system/friendly name (e.g. inventories)
- **Supports Extensions:** this allows you to extend an existing meta class with extra properties. For example, you can have a download class and you can extend it with "imagedownload" which contains width and height as extra parameters.

Field Info

- **System Name:** enter in a system name
- **Friendly Name:** enter in a friendly, front-end name
- **Maximum Length:** maximum number of characters allowed in this field

Click **Save** to save changes.

Business Object Customization		
<div> New Field Edit Publish Back To List </div>		
System Name:	Contract	
Friendly Name:	Contract Name	
Type:	Business Object (Public)	
Plural Name:	Contract	
Fields	1:N Relations	N:1 Relations
	N:N Relations	Forms
	System Views	
System Name	Friendly Name	Type
Contract	Contract Name	Text
ContractId	Id	Guid

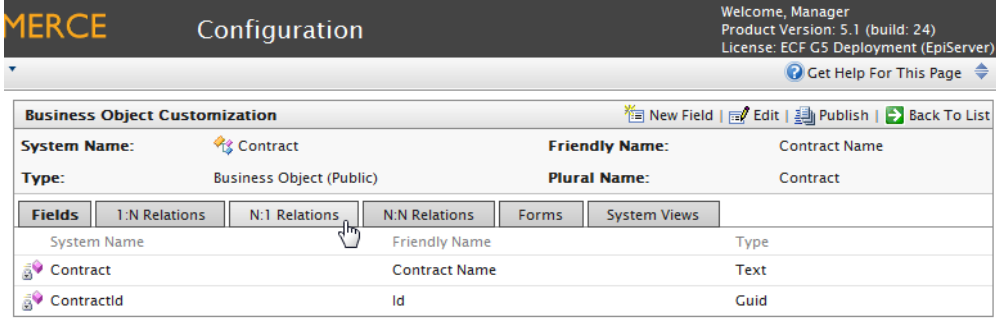
Add fields to the Contract business object as needed. Refer to **Adding New Fields to Business Object** section for instructions on how to add new fields to a business object.

Click **Save** to save changes.

Connecting a Contract to an Organization Using a "Many to One" Relationship

The next step is to create a relationship between this contract with an organization. In this example, the "Many to one" relationship will be used because multiple contracts can be tied to a single organization.

1. To add a relationship, click on the N:1 tab and click **New Relation "Many to one"**.



The screenshot shows the 'Business Object Customization' form for the 'Contract' system. The 'N:1 Relations' tab is selected, and a mouse cursor is pointing at it. The form displays the 'Contract' system with fields 'Contract Name' (Text) and 'Id' (Guid). The 'Friendly Name' is 'Contract Name' and the 'Plural Name' is 'Contract'.


2. On the **Relation N:1** form, select the primary object as "Organization." The Related Object will be the Contract object (the friendly name appears as opposed to the system name)

3. Enter in a **Field Name**, such as "Organization."

4. Enter in a **Friendly Name** that will render next to the field in a user view.

a. Checkmark the box next to Allow Nulls if you want the user to be able to submit the form without having to enter any data into the field. Otherwise, an unchecking this box means that this becomes a required field that the user must enter data in.

5. Checkmark the boxes you want the field to render in, such as the Edit Form, View Form, and Short Info Form.

 To learn more about forms, go to Customizing an Existing Form.

6. Lastly, set the Display Region using the dropdown menu. The display region determines which section the field will appear within the business object--in this case, the Organization object. **Note:** Depending on your selection, you may have additional options below the dropdown menu, such as **Display Text** and **Display Order**. An example is below.

7. Click **Save** to save your changes and go back to the Business Object Customization form.

Relation N:1

General Info

Primary Object: Organization

Related Object: Contract Name

Object "Contract Name"

Field Name: Organization

Friendly Name: Organization

☒ Allow Nulls

Add Field To:

- ☒ Edit Form
- ☒ View Form
- ☒ Short Info Form
- ☒ System View (General View)

Object "Organization"

Display Region: Information

Display Text: Contract

Display Order: 10000

So now that the Organization business object is tied to **Contract**, you will see that Contract now appears under the Information section or the **Organization Info** view page.

MERCE Organization Info

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[Edit](#) | [Organizations](#)

Name: EPiServer **Parent:**

Information

- Information
- Contacts
- Organizations
- Addresses
- Credit Cards
- Contract**

Contract

[Add Items](#) | [Exclude Selected](#)

	Contract Name
<input type="checkbox"/>	
<input type="checkbox"/>	



Since this example ties many contracts to a single organization, the organization business object is automatically related to the contracts object as a "1:N" relationship.

Business Object Customization New Field Edit Publish Back To List

System Name: Organization **Friendly Name:** Organization

Type: Business Object **Plural Name:** Organization

Fields | **1:N Relations** | N:1 Relations | N:N Relations | Forms | System Views

New Relation "one to many"

Name	Primary Object	Related Object
Address	Organization	Address
Contact	Organization	Contact
Contract	Organization	Contract Name
CreditCard	Organization	Credit Card
Organization	Organization	Organization

Publishing a Contract

Another feature of Business Foundation is the ability to publish objects within the left navigation frame as a node. You can essentially add more functionality to a specific subsystem without modifying code.

Now that the Contract object has been created and related to another object, you can publish it as a node.

To publish a business object, click on **Publish** under the Business Object Customization form.

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Business Object Customization New Field Edit Publish Back To List

System Name: Contract **Friendly Name:** Contract Name

Type: Business Object (Public) **Plural Name:** Contract

Fields | 1:N Relations | N:1 Relations | N:N Relations | Forms | System Views

System Name	Friendly Name	Type
Contract	Contract Name	Text
ContractId	Id	Guid
Organization	Organization	Text (ReferencedField)
OrganizationId	Organization	Reference

A new window will pop up for publication settings.

Dashboard	0	Display Region:	< nothing is selected >
Customer Management	40	Display Text:	Contract
Catalog Management	60	Display Order:	10000
Order Management	80	Client Script:	CSManagementClient.ChangeBafView("Contract", 'Lis
Marketing	100	Access	
Asset Management	120	Permissions:	businessfoundation.contract.list.permission
Reporting	130	Item Icon:	<input type="text"/> Browse...
Administration	200		

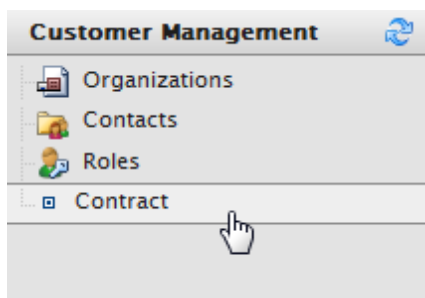
✓ Publish ✗ Close

1. Select a **Display Region** from the navigation tree on the left. Click on the node you want Contract to be placed under. For example, Contract will be placed on the root level of Customer Management.
2. The **Display Text** defaults to the system name of the Business Object. You can choose to keep the name or change it.
3. The **Display Order** defaults to 10000. You can keep it at that number or change the value to determine the position of the node.
4. The **Client Script** is autopopulated and can be left as is for most users. However, you can change Client Script if necessary.
5. **Access Permissions** is autopopulated and can also be left as is. If you want to change Access Permissions, refer to the Permissions section.
6. An Item Icon can be uploaded to represent the node. Click **Browse** to upload an icon.
7. Once all relevant information is entered, click on **Publish**.

To verify if the object was published, go to the Display Region where you specified the object to be published to. Click on the refresh icon on the left navigation frame if you at first do not see the new node.

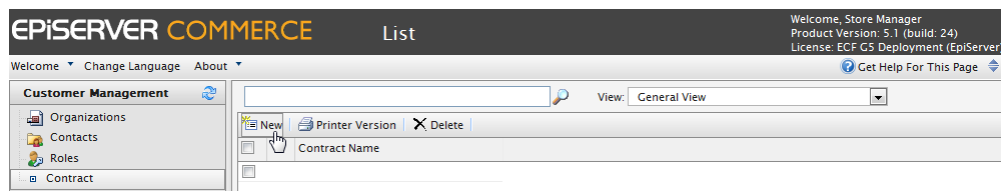


Always refresh your browser after publishing a business object.



Adding Contracts to an Organization

Now that the contract business object has been published, you can add multiple contracts to a single organization using a form. Click on the Contract node to bring up the list of contracts. Click on **New** to add a new contract.



Enter in a **Contract Name** (friendly name of the contract object) and select an **Organization** from the dropdown menu to associate the contract with. This functionality is in harmony with the "N:1" relationship between contract and organization.

Click **OK** to save the contract. The View Form appears.



To learn how to edit forms, go to the Customizing and Existing Form section.

You can make further edits to the details of the Contract by clicking **Edit** or delete the entry. Otherwise, click on **Back to list** to go back to the list of contracts.


By going to the **Organization Info** page for the particular organization you assigned multiple contracts to, you will see the list contracts you assigned.



You may need to make sure the **Display Region** is set for the related object (i.e. organization) or else you will not see the business object in the **Edit Form**.

Publishing Business Objects

A user-created business object can be published as a node anywhere in the left navigation frame to extend functionality under that particular subsystem.



You must refresh your browser after a business object has been published.

Permissions

When publishing Business Objects to place on a node on the **left Navigation Frame**, you can set permissions before publishing a Business Object.

Click on **Publish** on the **Business Object Customization** page.

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Business Object Customization

New Field | Edit | Publish | Back To List

System Name: Contract

Friendly Name: Contract Name

Type: Business Object (Public)

Plural Name: Contract

Fields

1:N Relations

N:1 Relations

N:N Relations

Forms

System Views

System Name	Friendly Name	Type
Contract	Contract Name	Text
ContractId	Id	Cuid
Organization	Organization	Text (ReferencedField)
OrganizationId	Organization	Reference

You can set permissions by customizing **Access Permissions**. This string is auto-generated. To change, you can copy and paste string values from other objects.

Dashboard0

Customer Management40

Catalog Management60

Order Management80

Marketing100

Asset Management120

Reporting130

Administration200

Display Region:< nothing is selected >

Display Text:Contract

Display Order:10000

Client Script:CSManagementClient.ChangeBafView('Contract', 'List')

Access Permissions:businessfoundation:contract:list:permission

Item Icon:

Browse...

Publish

Close

Deleting Published Business Objects

Once a business object has been published, you can delete all customized business object by going to **Administration > System Settings > Business Foundation**. To remove from the Left Menu, you have to perform an additional step of going to **Administration > System Settings > Left Menu** and clicking the **Delete** icon.

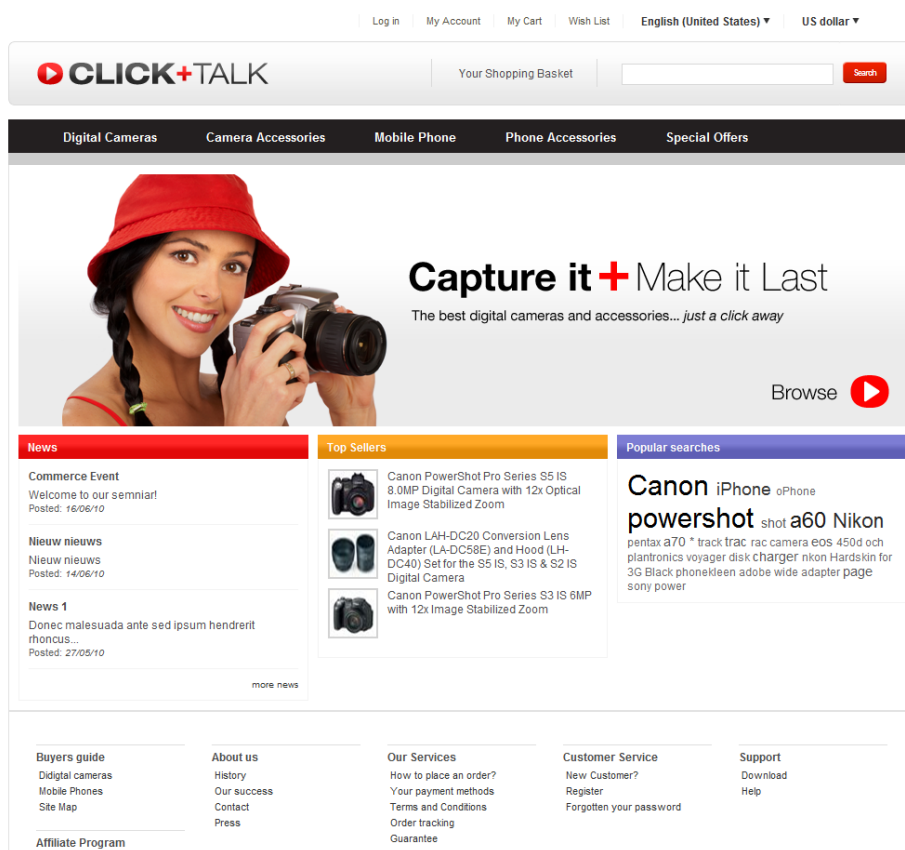
The screenshot shows the EpiServer Commerce Manager interface. The top navigation bar includes 'Start', 'CMS', and 'Commerce' tabs. The 'Commerce' tab is active, showing 'EPISEVER COMMERCE' and 'Left Menu' in the header. The left sidebar shows the 'Administration' menu expanded, with 'Left Menu' selected. The main content area displays a table of menu items with columns for 'Title' and 'Order'. A red 'X' icon is visible next to the 'Contract' item, indicating it is selected for deletion. The bottom of the page shows a pagination bar with '(78 items)' and page navigation links.

Title	Order
Dashboard	0
Home	10
Customer Management	40
Organizations	30
Contacts	40
Roles	50
Contract	10000
Catalog Management	60
Catalog Entry Search	10
Catalog Batch Update	20
Catalogs	30
Order Management	80
Order Search	10
Purchase Orders	20
Today	10
This Week	20
This Month	30
All	40
Purchase Orders By Status	30
Carts	40

Page Size: 20 (78 items) | Page 1 2 3 4

EPiServer Commerce Sample Site

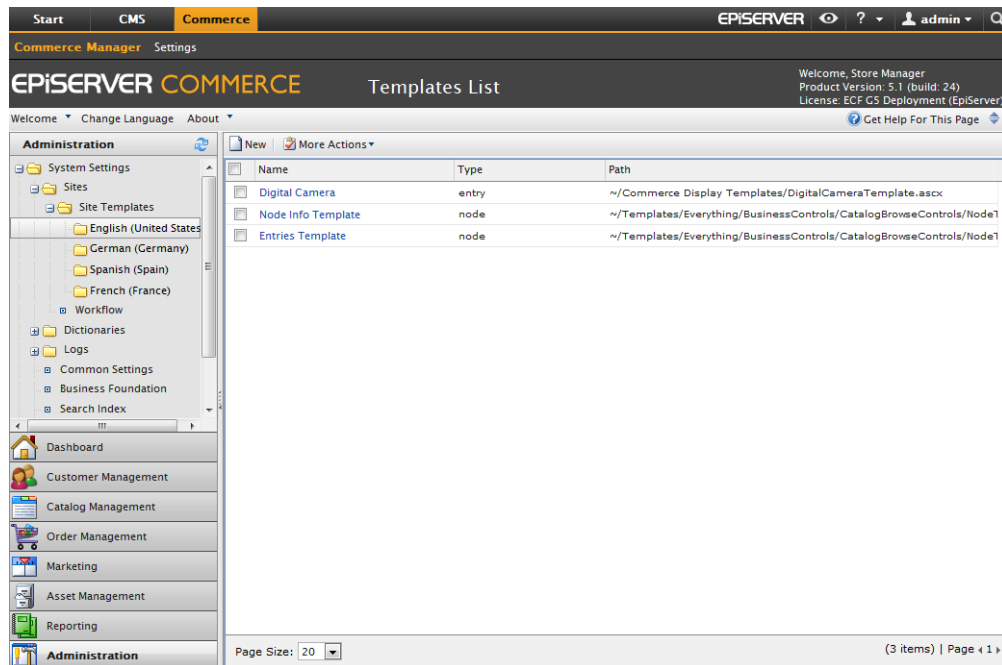
The EPiServer Commerce sample site provides a set of demo templates to illustrate the functionality of EPiServer Commerce. The sample template package is intended to be used as inspiration when you build your own e-commerce site based on EPiServer Commerce. In the following the templates included in the package are described in more detail, explaining the possibilities with EPiServer Commerce to both developers and end-users. The sample site provides an entrance to the world of e-commerce with EPiServer Commerce.



Importing the Display Templates

To be able to display different products on the e-commerce site you need to define the display templates to be used. These can be different for different language groups on the site. Importing display templates is done under **Administration** in Commerce Manager. Normally the templates are set up during installation, but you may want to add new templates or modify existing ones.

In this example we describe how you import the three display templates used in the EPiServer Commerce sample site.



Do the following to import the Digital Camera display template:

1. In Commerce Manager, select **Administration**, **System Settings**, **Sites**, **Site Templates** and then **English (United States)**.
2. In the **Name** field, enter "DigitalCameraTemplate".
3. In the **Friendly Name** field, enter "Digital Camera".
4. In the **Type** field, enter "entry".
5. In the **Path** field, add the path:
~/T-
emplates/Ev-
erything/BusinessControls/CatalogBrowseControls/EntryTemplates/DigitalCameraTemplate.ascx

Template Edit

Overview

Name: DigitalCameraTemplate

Friendly Name: Digital Camera

Type: entry

Path: ~/Commerce Display Templates/DigitalCameraTemplate.ascx

OK Cancel

Repeat the procedure for the other templates, and use the following settings:

Node Info Template

- **Name:** NodeInfoTemplate
- **Friendly Name:** Node Info Template
- **Type:** node
- **Path:** ~/Templates/Everything/BusinessControls/CatalogBrowseControls/NodeTemplates/NodeInfo.ascx

Entries Template

- **Name:** EntriesTemplate
- **Friendly Name:** EntriesTemplate
- **Type:** node
- **Path:**
~/Templates/Everything/BusinessControls/CatalogBrowseControls/NodeTemplates/EntriesFiltered.ascx

Importing the Sample Catalog

The product catalog contains information regarding brands and sales items. This information will either be displayed in the public site, or used for pricing and promotions. Product catalogs needs to be imported into EPiServer Commerce. There are different ways of doing this, and in this example we describe how you import the sample catalog used in the sample site, using the import/export function in Commerce Manager. When product catalogs have been imported, they also need to be indexed, in order for the product search function to incorporate any changes.

Additional information on how to import product catalogs can be found in the Catalog Management section.

The screenshot shows the EPiServer Commerce Manager interface. The top navigation bar includes 'Start', 'CMS', and 'Commerce'. The main header displays 'EPiSERVER COMMERCE' and 'Catalog List'. A sidebar on the left contains a 'Catalog Management' section with options like 'Catalog Entry Search', 'Catalog Batch Update', 'Catalogs', 'Everything', and 'Brands'. The main content area shows a table of catalogs:

	Name	Available from	Expires	Status
	Everything	12/18/2007 9:00:00 AM	12/18/2020 9:00:00 AM	True
	Brands	6/24/2008 7:00:00 PM	6/24/2020 7:00:00 PM	True

At the bottom, there is a 'Page Size: 20' dropdown and a status bar indicating '(2 items) | Page 1'.

Import the Sample Catalogs

The sample site includes two product catalogs providing the "everything" and the "brand" view.


1. In Commerce Manager, select **Catalog Management** and then **Catalogs**.
2. Click on **Import/Export** and then **Import Catalog**, this takes you to the **Import Catalog** screen.
3. Select "CatalogExport-BG2C-Everything.zip" and click **Start Import**.

4. When the import has completed, click **Close Window**.
5. Select "CatalogExport-B2C-Brands.zip" and click **Start Import**.
6. When the import has completed, click **Close Window**.

Import

It is strongly recommended that you back up your ECF database before performing import.

To import catalog, please pick up an existing file from the grid below or upload a new one. Then click the button 'Start Import' to start importing.

 Add New File

Files Available For Import:

File Name	Size	Created	Last Updated
CatalogExport-B2C-Everything.zip	9.52 MB	2/10/2010 4:00:45 PM	Today, 11:44 AM
CatalogExport-B2C-Brands.zip	185.66 KB	2/10/2010 4:00:45 PM	Today, 11:44 AM

1 Page 1 of 1 (2 items)

Start Import

Indexing the Sample Catalog

After importing a product catalog, it also needs to be indexed.

1. In Commerce Manager, select **Administration, System Settings** and then **Search Index**.
2. Click **Rebuild Index** to index the catalog for the first time. The **Build Index** option is used for future updates when you import the same catalog again and only want to index the changes.

Start
CMS
Commerce
EpiSERVER
admin

Commerce Manager
Settings

EpiSERVER COMMERCE
Search Manager
Welcome, admin
Product Version: 5.1 (build: 23)
License: ECF G5 Deployment (EpiServer)

Welcome
Change Language
About
Get Help For This Page

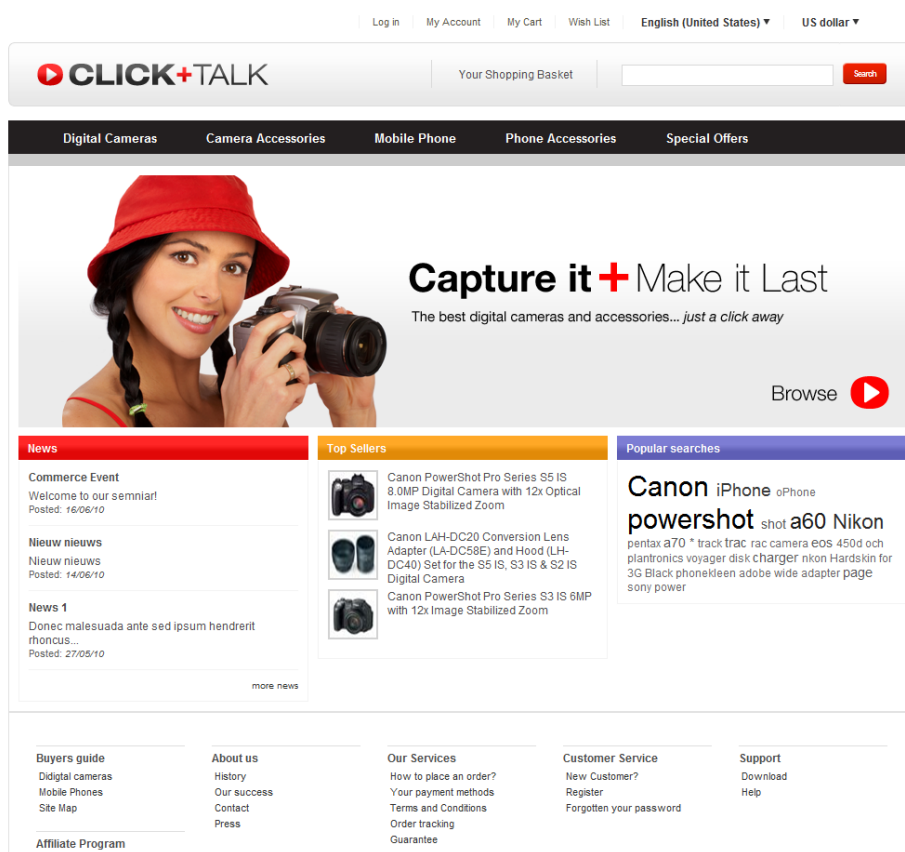
Administration
System Settings
Sites
Dictionaries
Logs
Common Settings
Business Foundation
Search Index
Left Menu
Catalog System
Order System
Dashboard
Customer Management
Catalog Management
Order Management
Marketing
Asset Management
Reporting
Administration

Index
Rebuild Index
Build Index

Rebuild the Search Index. This operation will cause complete index rebuild.
Build the Search Index. This operation will build index for items updated since last build.

Page Templates

The EPiServer Commerce product package is based on EPiServer CMS for managing content, and the e-commerce module Commerce Manager. The EPiServer Commerce package includes a **sample website** with a set of display templates. The page templates provide an example of how you can work with EPiServer Commerce to create your own web publishing and online store platform. Use the page templates as inspiration and adapt them to your own online store environment.



The sample site contains sample product data stored in a product database. The template package in EPiServer CMS contains a set of templates for displaying content and providing other typical e-commerce functions. The "engine" behind it all is the Commerce Manager module, driving the purchasing procedure in the background.



The templates, fields and functions described in this documentation refers to a "standard installation" of an EPiServer Commerce sample site. The standard functions and fields of EPiServer CMS are not described here. Please refer to the EPiServer CMS documentation for editors and administrators available on world.episerver.com.

The Page Tree Structure

When installing the EPiServer Commerce package with a sample site, a number of pages will be created and displayed in a specific structure in the page tree. Some of them will show editorial content. Other pages are used as containers for other pages. These will not display any content of their own and will be hidden in navigation menus.

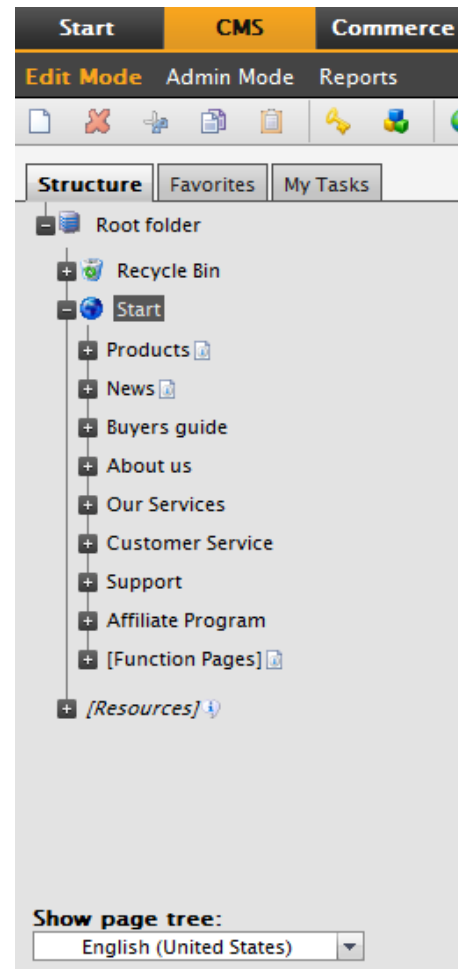
The Start page is built using the **Home** page type. The Start page contains numerous settings affecting the entire website, for instance top menus, search and login. This is also where you define pages to be used for shopping carts, payments and checkout.

Editorial content pages are most often based on the page type **Standard Page**. These are the pages where editors can create and edit content the usual way in EPiServer CMS. Examples of editorial content are the pages under the sections News, Get the Product and More Support.

The pages under the Products section, are based on a page type called **Product Listing**. These pages will provide the top menu of the website, based on what is listed under the Products page. The sort order of the Products page controls the order in which the menu items will be displayed.

The [Function Pages] section of the tree holds the display template for a number of typical functions such as My Account, My Cart, Wish List, Payment and Checkout. These have their own specific page types linking to functions in the Commerce Manager module.

The [Resources] section resides directly under the root page of the site. This part is used for the actual linking to the product catalog in Commerce Manager. The pages are based on the Product Listings page type and do not display any content.



Start Page

The Start page is based on the **Home** page type and is normally defined when the website is installed. The page holds a number of settings with references to other pages on the website. The start page will most likely not be touched very often after the setup, but occasionally references pointing to pages defined here may need to be changed.

When you open the Start page for editing in Edit mode, you will find that the Start page itself does not have an editorial area, since the content displayed is made up of different types of listings. In addition to the standard tabs of EPiServer CMS, the Start page has a tab containing specific site configuration property settings.

Content Tab

Below are the properties that can be changed in Edit mode under the **Content** tab of the Start page.

Name

The name of the page, as displayed in the page tree.

Fetch News list from

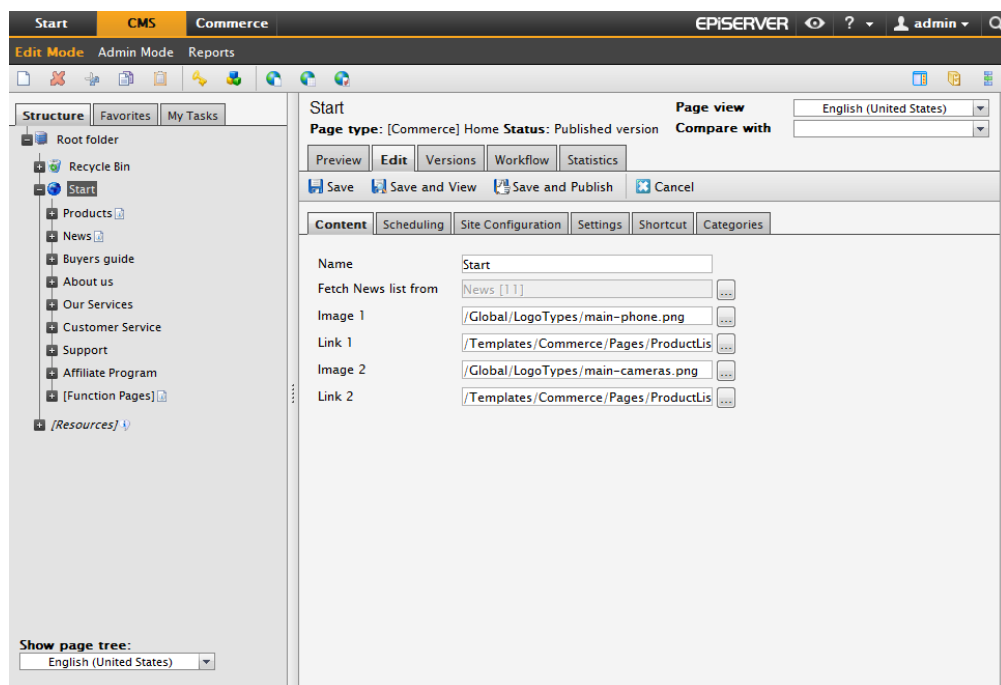
Defines the container page for the news item listing to be displayed in the mid-left information area of the start page.

Images

The start page has a top banner image. The image area has functionality for altering between a set of two images which can be defined here. Define images in the fields **Image 1/Image 2** to be displayed in the top banner area of the start page. Select images in the EPiServer CMS file manager.

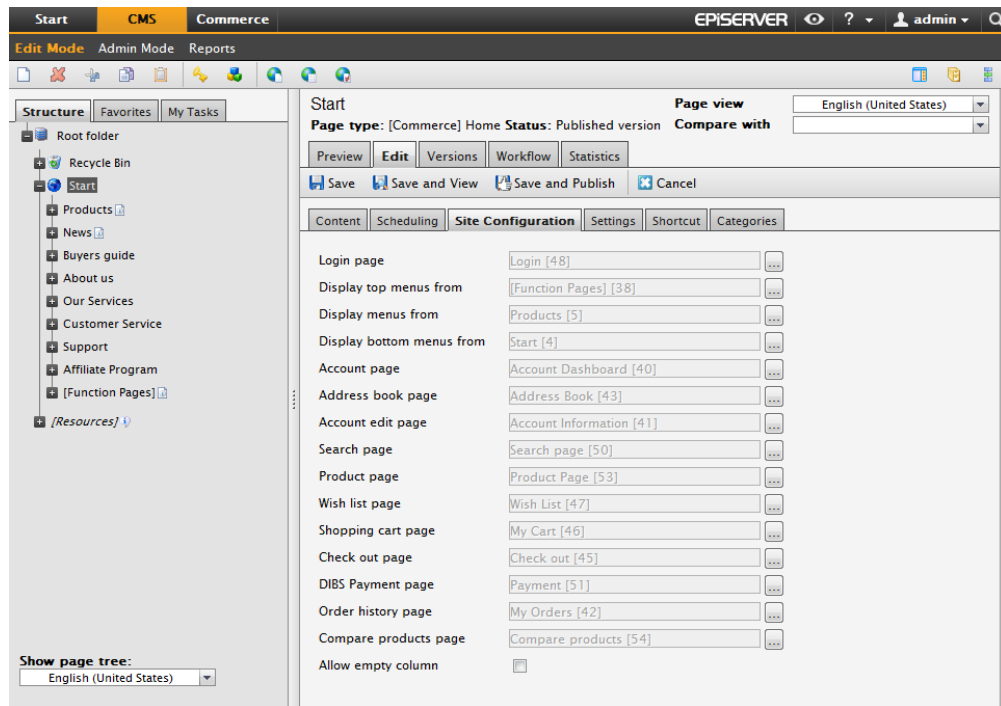
Links

In the fields **Link 1/Link 2** you can define links for each of the altering top banner images on the start page using the EPiServer CMS link dialog. The link will take the visitor to the specified URL when clicking on the top image of the start page.



Site Configuration Tab

The settings that are available under the **Site Configuration** tab when you edit the Start page, are common web-site configuration items that are defined as properties on the start page and will be inherited to the sub-pages. Most often these settings are defined when the website is installed but it may be necessary to update them at some point. Note that the function pages must be created first before defining them on the start page.



Open the Start page for editing in Edit mode, to change the settings for the different properties. Save and publish the page to update the settings.

Login page

Defines the login page to be used when visitors log in to the website. The login page itself has settings to define the account register and password recovery pages. Select the login page in the page tree structure to define it for the website.

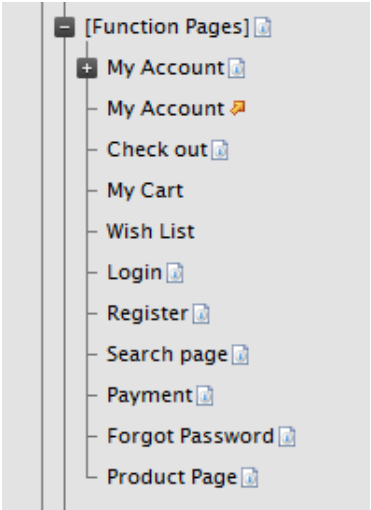
Display top menus from

In this field you configure the menu at the **very top** of the website. In this example the menu contains functions My Account, My Cart and Wish, as well as Log in/out and the language and currency selector.

Log out | My Account | My Cart | Wish List | English (United States) ▼ | US dollar ▼

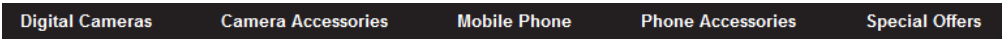
Links to the login page and the language selector will be displayed by default, but the other options are listed from the container page defined here. In this example, the container page is the page [Function Pages]. Under this page you create the other function pages such as My Account, Wish list etc.

The order in which they are presented in the menu is set by the sort order of the [Function Pages] container page. Pages that are set not to be visible in menus, will not appear. Select the page in the page tree structure to define it.

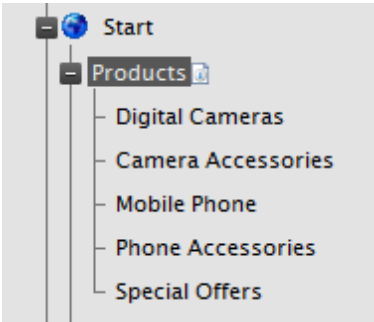


Display menus from

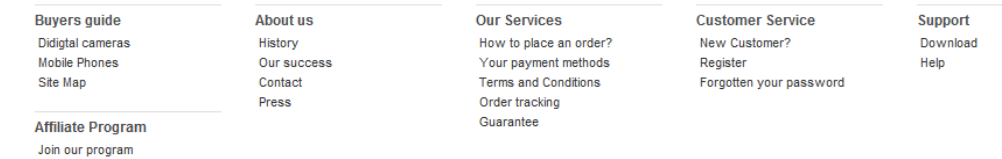
Displays the **main navigation menu** of the website.



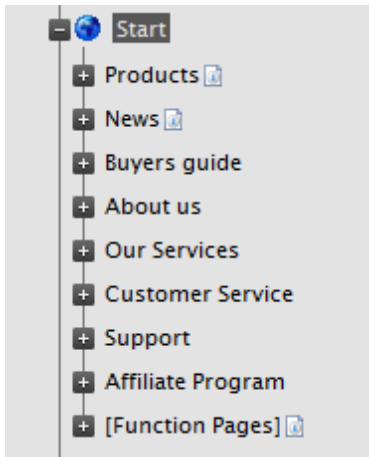
In this example, this information is collected from a container page named **Products**, which itself is not displayed in menus. The sub-pages consists of a number of selected product pages based on page type Product Listing. The order in which the pages are displayed in the menu is controlled by the sort order for the Product parent page, which in this case is set to be sorted according to sort index. Select the page in the page tree structure to define it.



Display bottom menus from



The start page contains a bottom section listing pages in five columns. The **Display bottom menus from** field defines from where the page listing will be fetched. In this example the listing will display pages and their one-level sub-pages under the start page. All pages will be listed except those that are set not to be displayed in menus.



In this example, the bottom menu listing will start with "Buyers guide", to be followed by "About us", "Our services" etc. Note that the listing will go from left to right to fill the columns. The order is controlled by the sort order of the start page, which is set to be sorted according to sort index in this case. The number of columns can be changed programatically in the **ColumnCount** property, default and maximum value is five. For additional information on this, please refer to the technical documentation for EPiServer Commerce available on world.episerver.com.

In the **Display bottom menus from** field, select the page in the page tree structure to define it.

Account page

This setting defines the **Account Dashboard** page to be used. This page displays a snapshot of recent account activities for a customer, and also provides possibility to update account information. Select the page in the page tree structure.

Address book page

This setting defines the address book page to be used when displaying a customers address information. Select the page in the page tree structure.

Account edit page

This setting defines the account edit page to be used when displaying a customers account details. Select the page in the page tree structure.

Search page

This setting defines the search page to be used on the website. Select the page in the page tree structure.

Product page

This setting defines the product page to be used when displaying details for a particular product. Select the page in the page tree structure to define it for the website. If you are using the EPiServer Commerce catalog page provider, the property setting here can be ignored.

Wish list page

This setting defines the wish list page to be used when displaying a customers wish list. Select the page in the page tree structure.

Shopping cart page

The page to be used when displaying a shopping cart. Select the page in the page tree structure.

Check out page

The page to be used when displaying the check out page for a customer. Select the page in the page tree structure.

DIBS Payment page

The page to be used when displaying a DIBS payment page. The page will process a DIBS payment through the DIBS payment gateway, which is used on the EPiServer Commerce sample site. There are many other payment gateways, and you may have a different payment solution in your implementation. Select the page in the page tree structure to set the payment page to be used.

Order history page

The page to be used when displaying the order history page for a customer. Select the page in the page tree structure.

Compare products page

This setting defines the page to be used when comparing products. This page provides functionality for displaying selected products next to each other for comparison. Select the page in the page tree structure.

Product compare page: page to compare products.

Allow empty columns

Check this field to allow empty columns to be displayed in the footer menu, in case a menu item does not have any sub-pages.

The different pages and page types are described in other sections of this documentation.

Standard Page

The page type Standard Page in EPiServer Commerce is used for creating ordinary information pages. It will also function as container page for holding pages of other page types, used for instance in listings. The Standard Page in EPiServer Commerce sample site has one additional field in comparison with a standard page in an ordinary EPiServer CMS sample site. This is the Fetch left menu listing from field, which allows editors to define which pages should be displayed in the left menu listing.

Select a page in the page tree from which to display the left side menu listing. If nothing is selected here, the left column will be empty.

Secondary body

Integer euismod

Velit a dolor consequat molestie fermentum est feugiat. Suspendisse mollis urna mi, at adipiscing lectus. Ut lobortis, lorem eget porta posuere, felis est hendrerit felis, a mattis elit justo quis mi.

Path:

Writer

Fetch main listing from

Display number of pages in the main list

Fetch left menu listing from

Fetch secondary listing from

Display number of pages in the secondary list

Product Listing

The page type **Product Listing** is used for listing product information from the product catalog in Commerce Manager. The listing will be fetched from the selected product category (node) in the product catalog, for instance digital cameras as in this example. The listing will display a short product description with price as well as an image, for each of the products. There are four products listed side by side in a row.

The page functionality will also include a product compare option as well as an **Add to Cart** button for each product in the list. The product listings will appear when a visitor clicks on a product in the top menu. The listing will display 20 products at the time as default, and the listing can be sorted according to product name and price. The left column will display related product information, depending on the selected product category.

Digital Cameras Camera Accessories Mobile Phone Phone Accessories Special Offers

Start - Digital Cameras





Shopping Options

Sort By: Featured Products

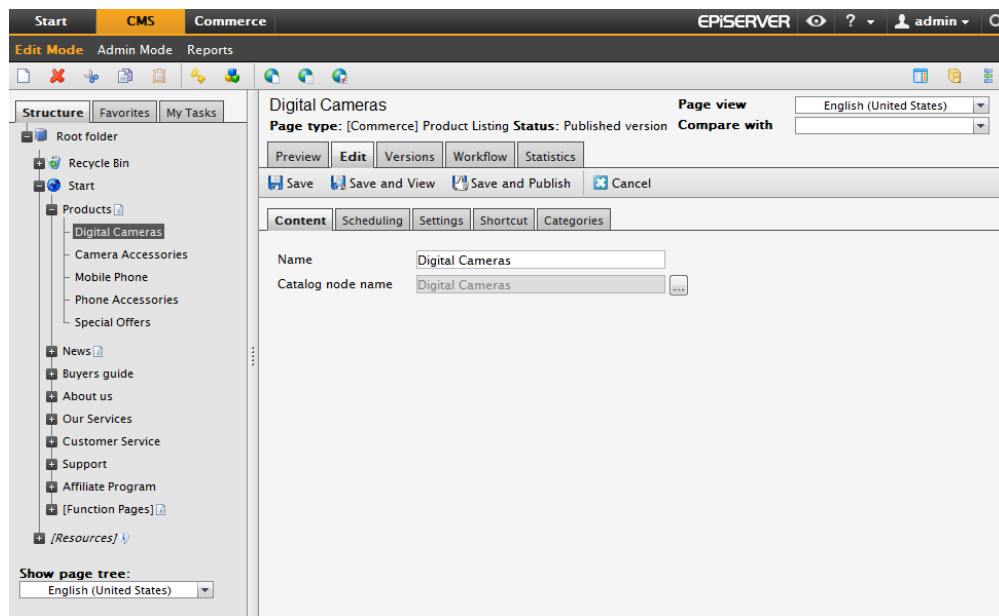
1 - 20 of 304 View All (304) 1 2 3 4 5 >>

BRAND

- Canon (25)
- Sony (36)
- Pentax (37)
- Olympus (13)
- Fuji (64)
- Sandisk (14)
- Transcend (6)
- Targus (8)
- Lexar (7)
- Kingston (4)
- Viking (7)
- Simpletech (6)
- Energizer (6)
- Digipower (5)
- Nikon (3)
- Epson (5)
- Adobe (5)
- Kodak (4)
- Apple (2)

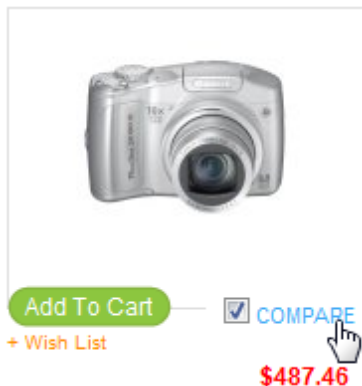
 <p>Add To Cart <input type="checkbox"/> COMPARE</p> <p>+ Wish List</p> <p>\$449.99 \$314.99</p> <p>You save: \$135.00</p> <p>Canon</p> <p>Canon PowerShot Pro Series S5 IS 8.0MP Digital Camera with 12x Optical Image Stabilized Zoom</p>	 <p>Add To Cart <input type="checkbox"/> COMPARE</p> <p>+ Wish List</p> <p>\$3,999.00</p> <p>Davis & Sanford</p> <p>Vista Explorer 60° Lightweight Tripod with Tripod Bag</p>	 <p>Add To Cart <input type="checkbox"/> COMPARE</p> <p>+ Wish List</p> <p>\$3,999.00</p> <p>Canon</p> <p>Canon LAH-DC20 Conversion Lens Adapter (LA-DC58E) and Hood (LH-DC40) Set for the S5 IS, S3 IS & S2 IS Digital Camera</p>	 <p>Add To Cart <input type="checkbox"/> COMPARE</p> <p>+ Wish List</p> <p>\$149.99</p> <p>Canon</p> <p>Canon TC-DC58B Tele Converter Lens for S5 IS, S3 IS & S2 IS Digital Camera</p>
--	---	--	--

To define a product listing, create a page based on the page type **Product Listing** and select the desired product category (node) in the **Catalog node name** field. The categories (nodes) available here are collected from the [Resources] section in the page tree structure which is set up at installation. This in turn reflects what is defined in the product catalog in Commerce Manager.






Products Compare

The Products Compare page type holds functionality for displaying selected products for comparison. The customer selects the desired products by marking the check box next to each product, and then clicks the Compare option.



The selected products are listed next to each other together with related product features, for easy overview and comparison. A product can be removed from the comparison list, or added to the shopping cart or the wish list. The selected products will remain for display on the compared products page until they are removed or a new product selection is done by the customer.

Digital Cameras	Camera Accessories	Mobile Phone	Phone Accessories	Specials
Start - Compare products				
Compare products				
Digital Cameras				
	 <p>Canon PowerShot Pro Series S5 IS 8.0MP Digital Camera with 12x Optical Image Stabilized Zoom</p> <p>\$449.99</p> <p>Add to Cart</p> <p>Add to Wishlist</p>	 <p>Canon PowerShot SX100IS 8MP Digital Camera with 10x Optical Image Stabilized Zoom (Silver)</p> <p>\$487.46</p> <p>Add to Cart</p> <p>Add to Wishlist</p>	 <p>Canon PowerShot Pro Series S3 IS 6MP with 12x Image Stabilized Zoom</p> <p>\$449.99</p> <p>Add to Cart</p> <p>Add to Wishlist</p>	
Display Name	Canon PowerShot Pro Series S5 IS 8.0MP Digital Camera with 12x Optical Image Stabilized Zoom	Canon PowerShot SX100IS 8MP Digital Camera with 10x Optical Image Stabilized Zoom (Silver)	Canon PowerShot Pro Series S3 IS 6MP with 12x Image Stabilized Zoom	
Brand	Canon	Canon	Canon	
Red Eye Reduction	True	True	True	

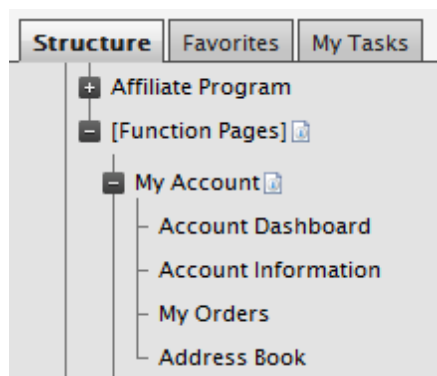
The Products Compare page type holds no information of its own so it has no editor field. When the product compare page has been created, it will be defined in the site configuration setting of the start page.

Function Pages

Function pages is a collection of pages holding typical e-commerce functionality such as account, shopping cart, check out and payment information. These features are personal and connected to a specific customer account. The function pages also include general features such as login, search and registration.

My Account Pages

In the sample site, the account information is gathered under the My Account page under the [Function Pages] branch of the page tree. The My Account page is a container page holding a number of sub-pages.



These sub-pages are based on specific page types with functionality for extracting personal customer information from the customer management part of Commerce Manager. The page types hold no editorial information of their own. After they have been created they will be defined in the site configuration setting of the start page.

Account Dashboard

The Account Dashboard page type provides an overview of the personal account information collected from various parts of the system. Information about recent orders are displayed, together with billing and shipping address information. Contact and password information can also be reached from here for editing. The left column displays the sub-pages under the My Account container page.

Digital Cameras
Camera Accessories
Mobile Phone
Phone Accessories
Special Offers

Start - Account Dashboard

Account Dashboard

Hello, Store!

From your My Account Dashboard you have the ability to view a snapshot of your recent account activity and update your account information. Select a link below to view or edit information.

Recent Orders | [view all](#)

ORDER ID	CREATED	SHIP TO	TOTAL	STATUS	
PO2654	June 02, 2010	Kalle Andersson	\$8,208.44	Shipped	View Order Reorder
PO13145	June 03, 2010	Manager	\$369.99	NewOrder	View Order Reorder
PO20804	June 07, 2010	Manager	\$4,373.94	Submitted	View Order Reorder
PO22369	June 08, 2010		\$389.98	NewOrder	View Order Reorder
PO27522	June 11, 2010		\$12,262.98	NewOrder	View Order Reorder
PO33568	June 15, 2010		\$1,434.44	NewOrder	View Order Reorder
PO60805	June 16, 2010	Manager	\$324.99	NewOrder	View Order Reorder

Account Information

Contact Information | [edit](#)

When created, the Account Dashboard page is defined in the site configuration setting of the start page.

Account Information

From the Account Information page type a customer can update the user name, e-mail address and password for the account.

Welcome, Store!

Log out | My Account | My Cart | Wish List | English (United States) ▼ | US dollar ▼

CLICK+TALK | Your Shopping Basket |

Digital Cameras | Camera Accessories | Mobile Phone | Phone Accessories | Special Offers

Start - Account Information

Edit Account Information

Account Information

* User Name: admin

* First Name: ✓

* Last Name: ✓

* Email Address: ✓

Change Password:

My Account

- Account Dashboard
- Account Information
- My Orders
- Address Book

[Buyers guide](#)
[Digital cameras](#)
[Mobile Phones](#)
[Site Map](#)

[About us](#)
[History](#)
[Our success](#)
[Contact](#)

[Our Services](#)
[How to place an order?](#)
[Your payment methods](#)
[Terms and Conditions](#)
[Ordering](#)

[Customer Service](#)
[New Customer?](#)
[Register](#)
[Forgotten your password](#)

[Support](#)
[Download](#)
[Help](#)

When created, the Account Information page is defined in the site configuration setting of the start page.

Account My Orders

The purpose of the Account My Orders page type is to display the order history for an account. The information is collected from the customer management part of Commerce Manager.

Welcome, Store!

Log out | My Account | My Cart | Wish List | English (United States) ▼ | US dollar ▼

CLICK+TALK | Your Shopping Basket |

Digital Cameras | Camera Accessories | Mobile Phone | Phone Accessories | Special Offers

Start - My Orders

Order History

ORDER ID	CREATED	SHIP TO	TOTAL	STATUS	
PO2654	June 02, 2010	Kalle Andersson	\$8,208.44	Shipped	View Order Reorder
PO13145	June 03, 2010	Manager	\$369.99	NewOrder	View Order Reorder
PO20804	June 07, 2010	Manager	\$4,373.94	Submitted	View Order Reorder
PO22369	June 08, 2010		\$389.98	NewOrder	View Order Reorder
PO27522	June 11, 2010		\$12,262.98	NewOrder	View Order Reorder
PO33568	June 15, 2010		\$1,434.44	NewOrder	View Order Reorder
PO60805	June 16, 2010	Manager	\$324.99	NewOrder	View Order Reorder

My Account

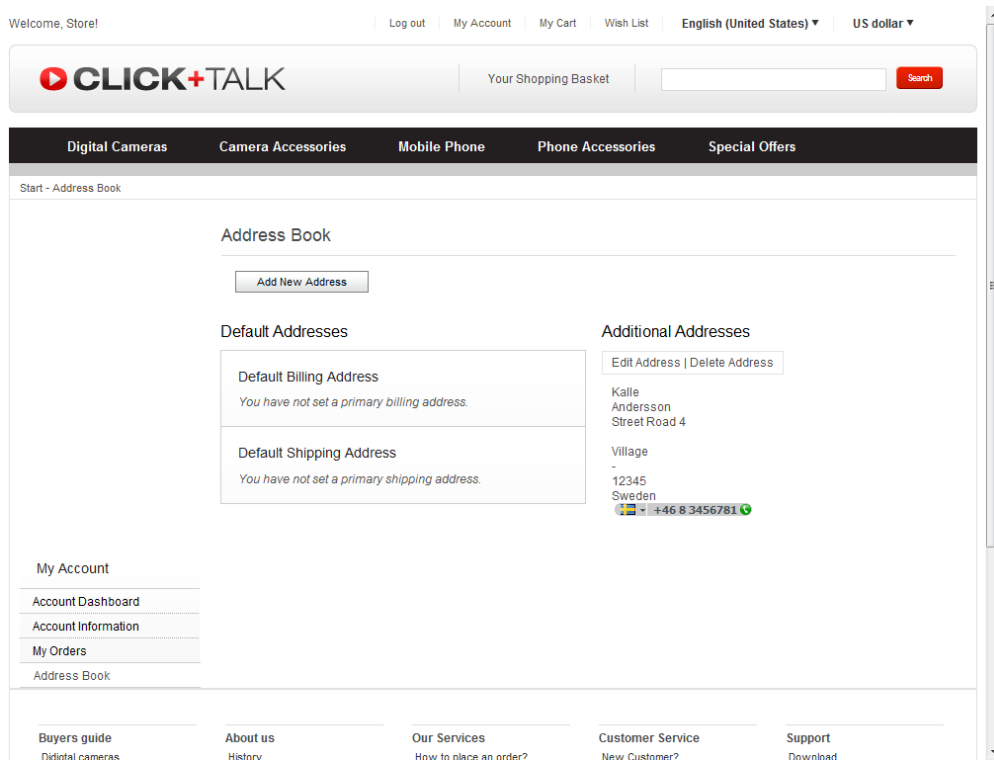
- Account Dashboard
- Account Information
- My Orders
- Address Book

[Buyers guide](#)
[About us](#)
[Our Services](#)
[Customer Service](#)
[Support](#)

When created, the Account My Orders page is defined in the site configuration setting of the start page.

Account Address Book

The Account Address Book page type holds functionality for displaying and updating address information for an account. The information is collected from the customer management part of Commerce Manager.



When created, the Account Address Book page is defined in the site configuration setting of the start page.

Check Out

The purpose of the **Check Out** page type is to display the steps of the check out procedure when a customer wants to finalize a purchase. The check out procedure is initiated when the customer selects the **Proceed to checkout** option for instance from the **Shopping Cart** view. The functionality of the page is linked to the payment and shipping options defined in Commerce Manager.

The checkout procedure may look different depending on payment and shipping options defined in the system. In this example the checkout procedure has four steps: Shipping Address, Shipping Options, Payment Options and Order Confirmation.

Step 1: Shipping Address

Log in | My Account | My Cart | Wish List | English (United States) ▼ | US dollar ▼

CLICK+TALK 2 item(s) in your cart

Digital Cameras | Camera Accessories | Mobile Phone | Phone Accessories | Special Offers

Start - Check out

Shipping Address **1** Shipping Options **2** Payment Options **3** Order Confirmation **4**

* FIRST NAME:

* LAST NAME:

* STREET ADDRESS:

* CITY: ✓

COUNTRY: ▼

* STATE/PROVINCE: ▼ ✓

* ZIP: ✓

* DAY PHONE: ✓

EVENING PHONE:

FAX:

The customer enters name, address and contact details, if these are not already registered in the system. If they are, there will be an option to update the existing information. Clicking on **Proceed To Shipping Options** will take the customer to step two in the process.

Step 2: Shipping Options

Log in | My Account | My Cart | Wish List | English (United States) ▼ | US dollar ▼

CLICK+TALK 2 item(s) in your cart

Digital Cameras | Camera Accessories | Mobile Phone | Phone Accessories | Special Offers

Start - Check out

Shipping Options **1** Shipping Address **2** Shipping Options **3** Payment Options **4** Order Confirmation **5**

Shipping to	Shipping Options
Mary Smith	<input checked="" type="radio"/> \$10.00 - Fixed Shipping Rate <input type="radio"/> \$2.00 - Ground Shipping
111 First Street	
First City, California 81856	Description
United States	\$974.92
181 675 456	2 of Canon PowerShot SX100IS 8MP Digital Camera with 10x Optical Image Stabilized Zoom (Silver)

The customer selects the desired shipping options. The contact details from the previous step are displayed in the left column, and there is a possibility to back to the previous step to update any information. Clicking on **Proceed To Payment** will take the customer to step three in the process.

Step 3: Payment Options

Digital Cameras Camera Accessories Mobile Phone Phone Accessories Special Offers

Start - Check out

1 Shipping Address 2 Shipping Options 3 Payment Options 4 Order Confirmation

Payment Options

Email Address

Notification about your order will be sent to this email address.

* Email Address: ✓

New Billing Address

* FIRST NAME:

* LAST NAME:

* STREET ADDRESS:

* CITY:

COUNTRY:

* STATE/PROVINCE:

* ZIP:

* DAY PHONE:

EVENING PHONE:

FAX:

Payment Options

☒ Payment By Card DIBS

You will be redirected to DIBS to make payment.

☐ Pay By Phone

☐ Pay By Credit Card

<< Back Review & Place Order

The customer enters the billing address, if this is not already in the system. The desired payment option is selected. Here there is a possibility to back to the previous steps. Clicking on **Review & Place Order** will take the customer to step four in the process.

Step 4: Order Confirmation

Digital Cameras
Camera Accessories
Mobile Phone
Phone Accessories
Special Offers

Start - Check out

Order Confirmation
1 Shipping Address
2 Shipping Options
3 Payment Options
4 Order Confirmation

Shipping Address

1 package via Fixed Shipping Rate

Mary Smith
111 First Street
First City, California 81856
United States
181 675 456

Order Email

mary.smith@company.com

Items Ordered

2 of Canon PowerShot SX100IS 8MP Digital Camera with 10x Optical Image Stabilized Zoom (Silver)

Total

\$974.92

Discount: \$0.00
Item(s) Subtotal: \$974.92
Shipping & Handling: \$10.00

Total for this Shipment: \$984.92

Billing Address

Method: Payment By Card DIBS

Mary Smith
111 First Street
First City, California 81856
United States
181 675 456

Subtotal: \$974.92
Discount: \$0.00
Taxes: \$0.00
Shipping & Handling: \$10.00

TOTAL: \$984.92

<< Back

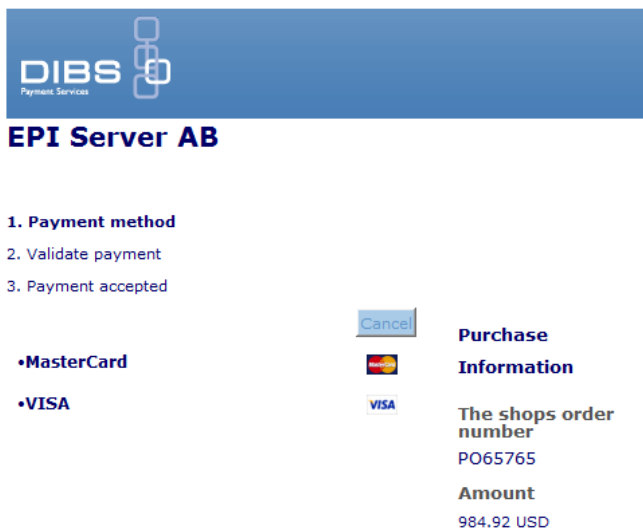
Place Order

Step four provides a possibility to review the order details including pricing information before the order is submitted. Details from previous steps are displayed with the possibility to back to previous steps. Clicking on **Place Order** will submit the order to the system and initiate the order management procedures.

The **Check Out** page is created in Edit mode and then defined in the site configuration setting of the start page.

DIBS Payment Services Function

The EPiServer Commerce sample site has an example function for managing payment services using the **DIBS standard payment method** with credit card. When the order is placed and confirmed, the procedure will continue with the payment. If the selected payment option is "Payment By Card DIBS" in step 3 of the checkout procedure, the DIBS payment function will be activated to carry out the payment procedure.



DIBS
Payment Services

EPI Server AB

1. **Payment method**
2. Validate payment
3. Payment accepted

•MasterCard

•VISA

Purchase Information

The shops order number
PO65765

Amount
984.92 USD

[Cancel](#)

Selecting the desired credit card brand will allow for entering the credit card details.



DIBS
Payment Services

EPI Server AB

1. [Payment method](#)
2. **Validate payment**
3. Payment accepted

Payment using VISA

* Card number:
4263880022431091 ✓

* Expiry month:
07 ✓

* Expiry year:
11 ✓

* CVC/CVV:
953 ✓

Purchase Information

The shops order number
PO66479

Amount
8,008.00 USD

Payment method

[Cancel](#)

[Validate payment](#)

Selecting **Validate Payment** will validate the payment. If the card details validate properly the payment will be accepted and the process will be completed.

To find out more about the payment process and configuration of the DIBS and other payment methods for EPiServer Commerce, please refer to the technical development documentation for EPiServer Commerce.

Shopping Cart

The purpose of the **Shopping Cart** page type is to display product items that a customer have added to the personal shopping cart. The page also provides functionality for changing the quantity of items as well as removing items from the list or moving them to the wish list. The **Apply coupon** option will apply any discount from a selection of related discount options from the system.

When the shopping cart information has been changed, clicking the **Update Cart** option will cause the pricing information to be recalculated based on the new information. Clicking the **Continue Shopping** option takes the customer back to the product page last visited.

Log in | My Account | My Cart | Wish List | English (United States) ▼ | US dollar ▼


CLICK+TALK 2 item(s) in your cart

Digital Cameras | Camera Accessories | Mobile Phone | Phone Accessories | Special Offers

Start - My Cart

Shopping Cart

Coupon:

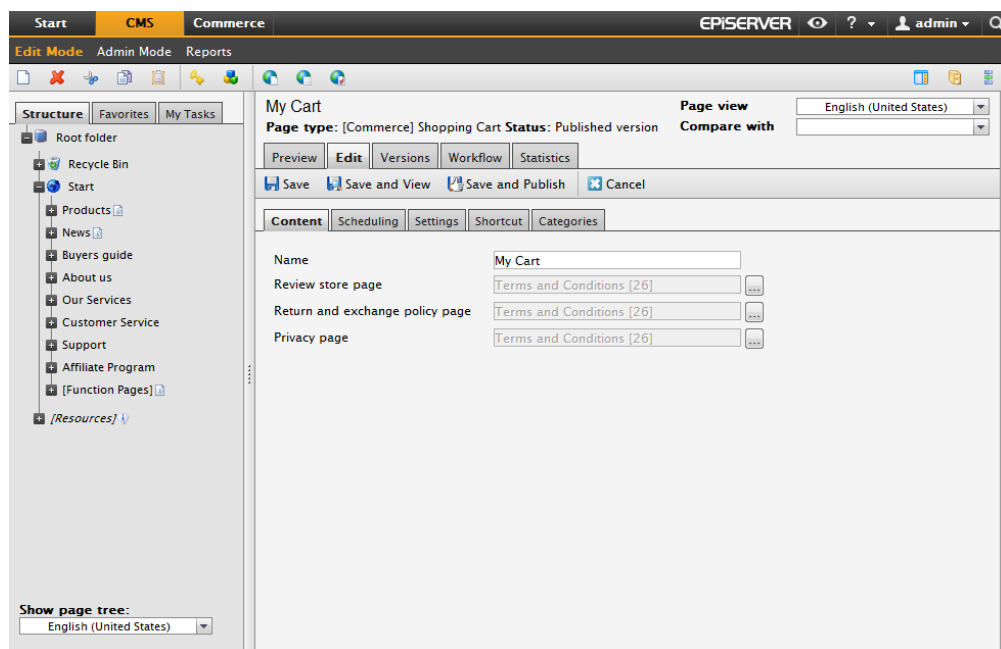
	Description	Each	Qty	Total
Move to wishlist Remove	 Canon PowerShot Pro Series S5 IS 8.0MP Digital Camera with 12x Optical Image Stabilized Zoom Item #: 013803079616	\$449.99 \$314.99 You save: \$135.00	1 ▼	\$314.99
Move to wishlist Remove	Vista Explorer 60" Lightweight Tripod with Tripod Bag Item #: 049383208344	\$3,999.00	1 ▼	\$3,999.00
Sub total:				\$4,313.99

[Review Store Policies](#)
[Return and Exchange policy](#)
[Privacy policy](#)

General information regarding store and privacy policies are also defined on the **Shopping Cart** page type for this sample site. This information will be displayed as default links on the Shopping Cart page, to be visible before the customer proceeds to checkout.

Open the Shopping Cart page in Edit mode to define the following:

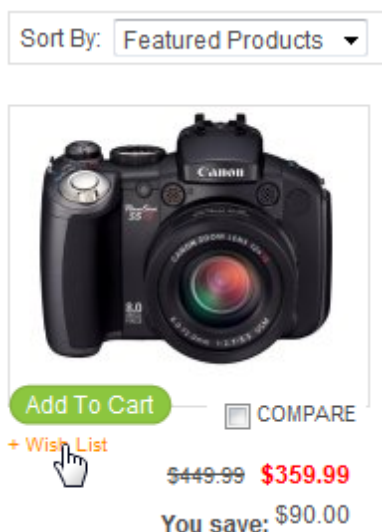
- The **Review store page**. Page describing the general store policy. Create the page (page type Standard Page) and select it in the page tree.
- The **Return and exchange policy page**. Page describing the general return and exchange policy. Create the page (page type Standard Page) and select it in the page tree.
- The **Privacy page**. Page describing the general privacy policy for personal information stored on the site. Create the page (page type Standard Page) and select it in the page tree.



When created, the **Shopping Cart** page is defined in the site configuration setting of the start page.

Wish List

The **Wish List** page functionality displays product items in a personal wish list for a customer. The items are added to the list when the customer clicks on the **Wish List** option for a product.



The wish list itself is accessed when clicking on the **Wish List** option in the menu on the very top of the page.

Welcome, Store!



Log out | My Account | My Cart | Wish List | English (United States) ▼ | US dollar ▼

CLICK+TALK | 1 item(s) in your cart |

Digital Cameras | Camera Accessories | Mobile Phone | Phone Accessories | Special Offers

Start - Wish List

Wish List

	Description	Each	Qty	
add to cart remove	 Pentax K200D 10.2MP Digital SLR Camera with Shake Reduction (Body Only) Item #: 027075138131 added June 16, 2010	\$599.95	1 ▼	Item is in stock
add to cart remove	 Canon PowerShot Pro Series S5 IS 8.0MP Digital Camera with 12x Optical Image Stabilized Zoom Item #: 013803079616 added June 17, 2010	\$449.99 \$314.99 You save: \$135.00	1 ▼	Item is in stock

When created, the **Wish List** page is defined in the site configuration setting of the start page.

Login

The purpose of the **Login** page is to provide a login possibility for registered customers of the e-commerce website. The user provides a user name or e-mail address as well as a password, and then clicks **Log in**. When the login details are accepted the user is taken to the Account Dashboard displaying an overview of the current account information.

The **Login** page also has functionality for password recovery. When clicking on the **Forgot your password?** option, the user will be taken to the **Forgot Password** page of the website.

The Login page is also the entrance for new registration of new customers to the site. Clicking on the **Create a New account** will take the user to the **Register** page of the website, for creation of a new account.

When opening the **Login** page in Edit mode, you can define the **Password recovery page** and the **Register page** by selecting the appropriate pages in the page tree structure. Naturally these pages must be created before you can configure them here.

When created, the **Login** page is defined in the site configuration setting of the start page.

Register

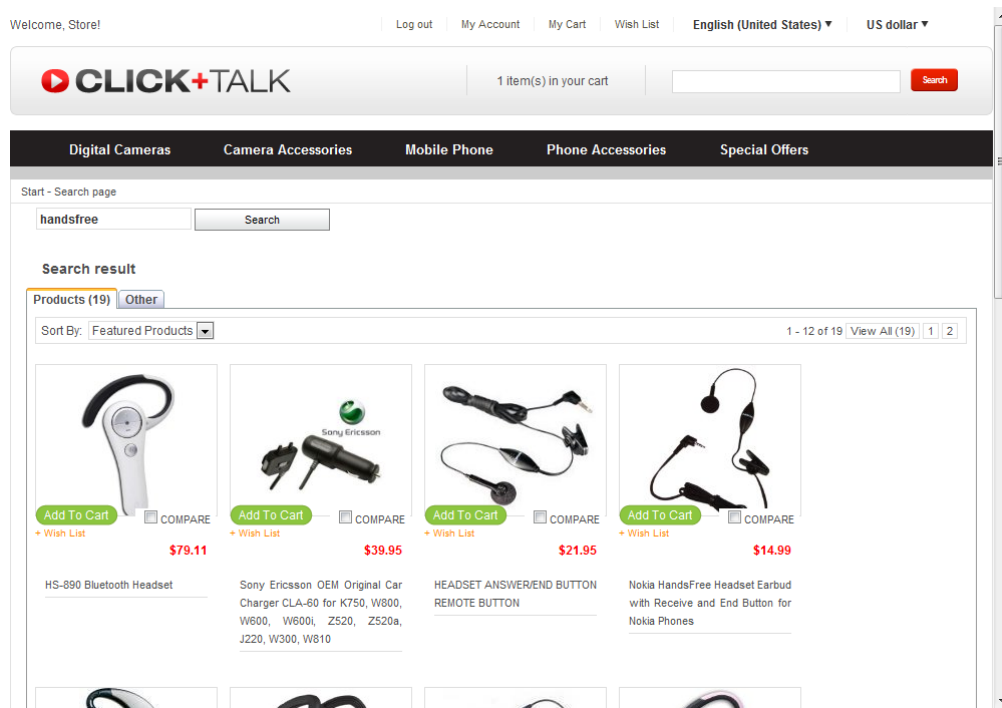
The **Register** page type provides the possibility to create new customer accounts on the website. Personal and login information such as name, e-mail and password is entered by the user, and by clicking **Register** the account is created and the account details are saved in the customer database of Commerce Manager. Later on additional information such as billing and shipping address can be added.

The screenshot displays the 'Register' page of the 'CLICK+TALK' website. The header includes navigation links like 'Log in', 'My Account', 'My Cart', and 'Wish List', along with language and currency selectors. The main navigation bar lists categories: 'Digital Cameras', 'Camera Accessories', 'Mobile Phone', 'Phone Accessories', and 'Special Offers'. The page title is 'Start - Register'. The main heading is 'Sign Up for Your New Account'. The form is divided into two sections: 'Personal Information' and 'Login Information'. In the 'Personal Information' section, the fields are: '* First Name: Mary', '* Last Name: Smith', and '* Email Address: mary.smith@company.com'. In the 'Login Information' section, the fields are: '* User Name: Mary', '* Password: *****', and '* Confirm Password: *****'. Each field has a green checkmark to its right, indicating that the input is valid. At the bottom of the form is a 'Register' button.

When created in Edit mode, the **Register** page is defined in the **Login** page of the website.

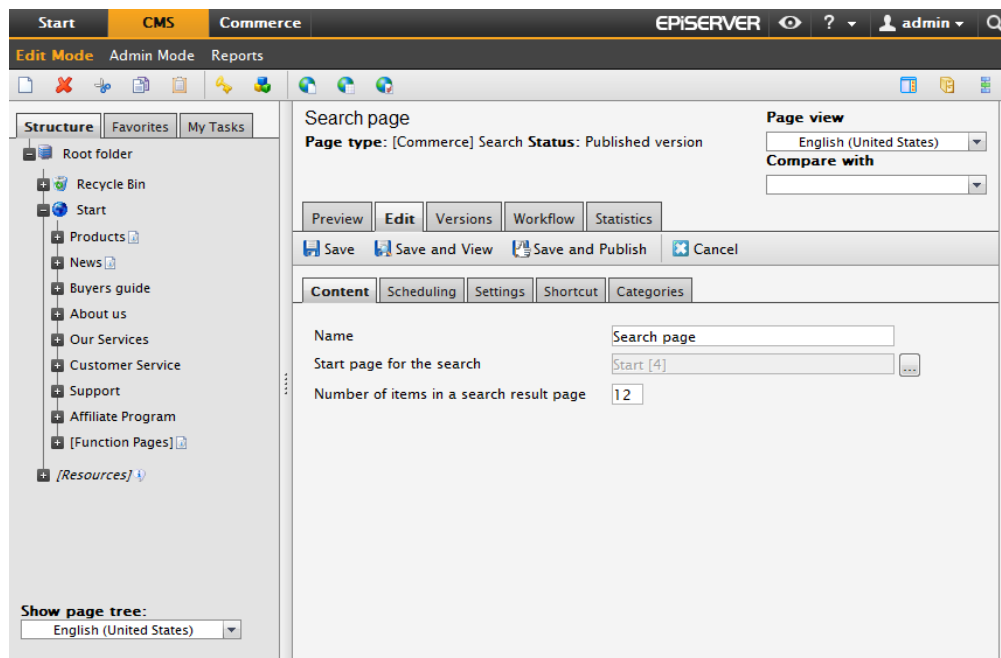
Search

The **Search page** page type is used for displaying the results of a product search performed on the website. The matching search hits are shown in a listing with rows of four product items. Product details are displayed, with the possibility to add items to the shopping cart, or select items for comparison. The number of matching hits listed on a search result page can be customized. Clicking on an item will display the full product information page.



In Edit mode, the following properties are set in the **Search page** page type:

- The **Start page for the search**. Select a page in the page tree to define where the search should begin, often this will be the start page of the website.
- The **Number of items in a search result page**. Set a number to define the number of matching hits listed on a search result page.



When created, the **Search page** is defined in the site configuration setting of the start page.

Payment

The purpose of the **Payment** page is to link to the appropriate payment procedure when finalizing a purchase in the checkout process. There are many different payment methods to use in different markets, and the payment gateways of e-commerce websites are often parts that are highly customized. For this sample site, the commonly used DIBS payment method is used here.

Payment methods are set up under application configuration for payment gateways in Commerce Manager. The Payment page functionality is linked to the corresponding payment method, for instance the payment by card (DIBS) method. Other payment methods may be payment by phone or by credit card.

The **Payment** page is created in Edit mode and then defined in the site configuration setting of the start page in the **DIBS Payment page** field. Several payment methods may apply on an e-commerce website.

Forgot Password

The purpose of the **Forgot Password** page is to provide possibility for registered users to retrieve lost passwords. The user will enter the e-mail address that is registered in the system to receive a new password set by the system.

When created in Edit mode, the **Forgot Password** page is defined on the **Login** page of the website.

Product Page

The **Product Page** is a central page type on this type of site, since this is used for displaying product details and related information. The page template will display selected product information such as display name and description and item number, from the product catalog of Commerce Manager. This information is shown in the central part of the page.

The rest of the page is built up displaying other information related to the product. The information is selected based on type of product and meta data available in the product catalog. Stock status information for the product item is displayed. From here the customer has the option to add selected numbers of the item to the shopping cart, or to the wish list.


Welcome, Store!

Log out | My Account | My Cart | Wish List | English (United States) ▼ | US dollar ▼

CLICK+TALK 1 item(s) in your cart

Digital Cameras | Camera Accessories | Mobile Phone | Phone Accessories | Special Offers

Start - Digital Cameras - Canon PowerShot SX100IS 8MP Digital Camera with 10x Optical Image Stabilized Zoom (Silver)



Canon




Canon PowerShot SX100IS 8MP Digital Camera with 10x Optical Image Stabilized Zoom (Silver)

\$487.46

Item Number: 013803084146 Usually Ships in 24 Hours ☐ Compare


Compare Products
You have no items to compare.

Related Products and Accessories

<input type="checkbox"/>		DigiPower DigiPower DPS-3000+ 3-Hour AA/AAA Rechargeable Battery Kit with 4 AA 2700 mAh Batteries and Car Charger	\$2,999.00
<input type="checkbox"/>		Canon Canon ACK-800 AC Adapter for A310, A430, A520, A530, A540, A700, A710, A720IS & SX100IS ISDigital Cameras	\$4,900.00
<input type="checkbox"/>		DigiPower DigiPower DPS-5000 1 Hour AA/AAA Rechargeable Battery Kit with 4 AA 2700 mAh Batteries	\$3,499.00


Item is in stock

You May Also Like...



Sony
Sony Quick Battery Charger with 4 AA Ni-MH Rechargeable Batteries

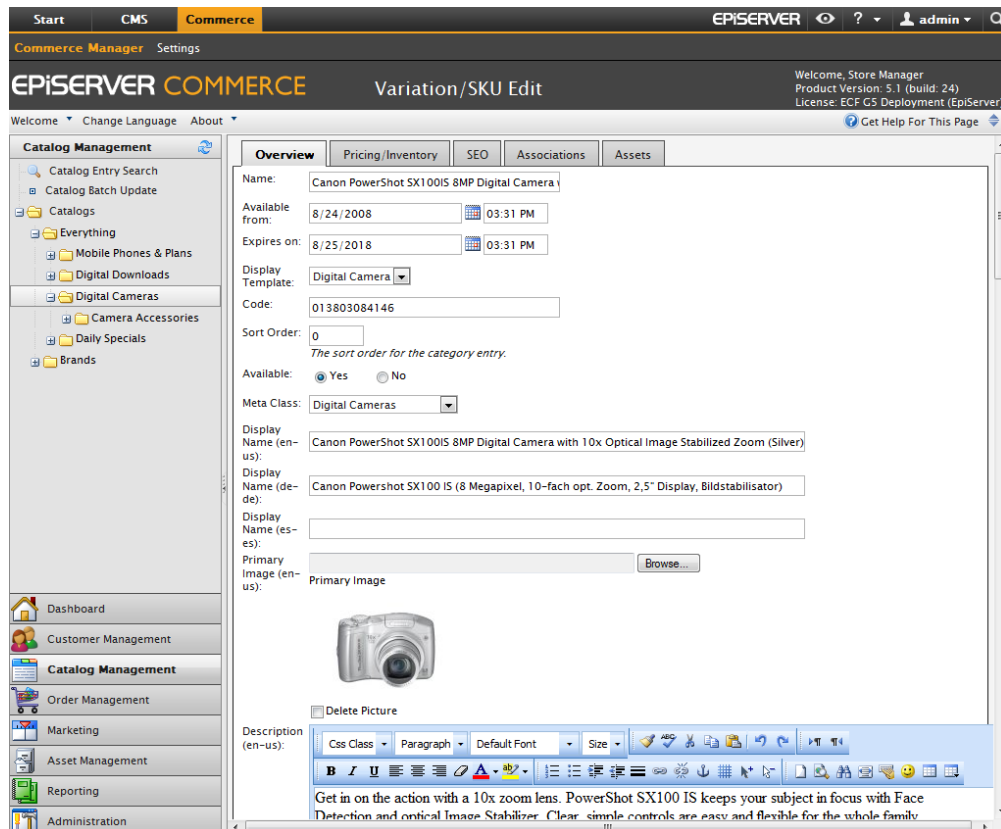
\$2,999.00



Canon
Canon PSC-100 Digital Camera Case

\$1,999.00

The **Product Page** page type is linked to the information stored about the product in the product database. For instance, information such as name, code, catalog image, and display price is collected from the Commerce Manager product catalog.



When created, the **Product page** is defined in the site configuration setting of the start page.

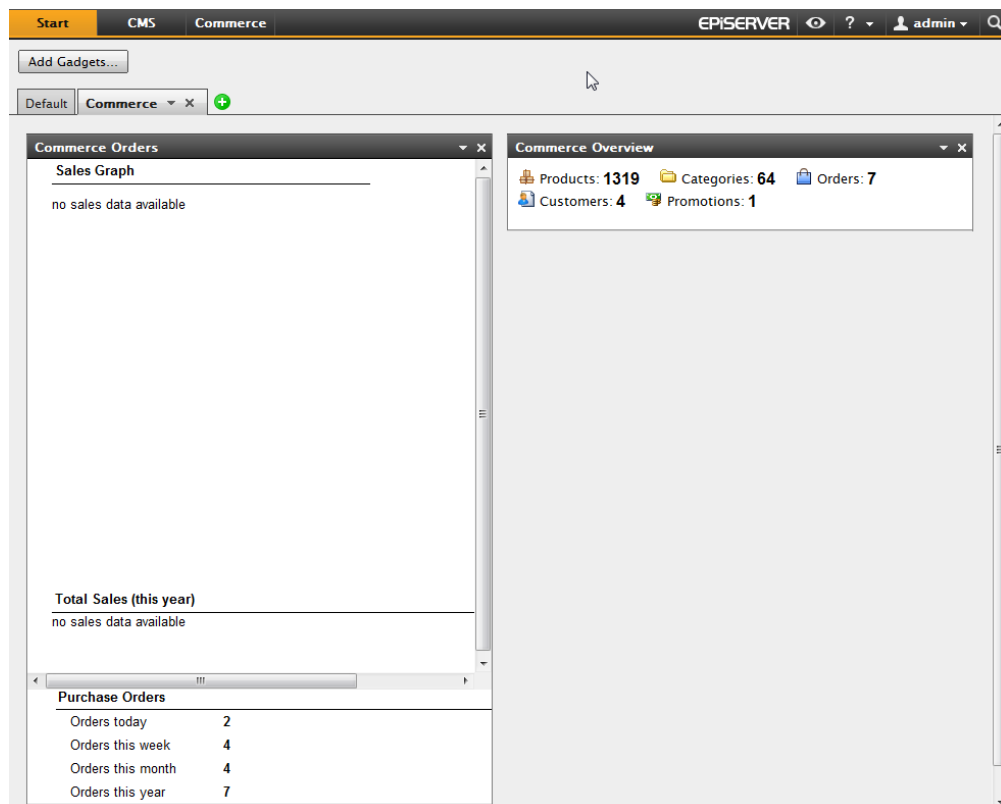
Gadgets in EpiServer Commerce

A gadget is a small application which can be displayed on the OnlineCenter dashboard for quick access. The OnlineCenter of EpiServer CMS comes with a number of predefined gadgets, and the EpiServer Commerce sample site is also delivered with gadgets customized for e-commerce needs and solutions. In the user documentation for EpiServer OnlineCenter you can read more about gadgets and how to use them. You can also develop and customize your own gadgets to suit your needs and the tasks you are working with. Find out more about development of gadgets in the technical documentation for OnlineCenter and EpiServer CMS on world.episerver.com.

Adding Gadgets

The EpiServer Commerce sample site comes with two predefined gadgets, **Commerce Orders** and **Commerce Overview**, providing overviews of sales, orders and activities in the online store. These are intended as examples of the type of information you can display as gadgets on the dashboard of OnlineCenter. The same information is also displayed on the dashboard inside Commerce manager.

In the following we will describe how to add and configure the predefined gadgets of the EpiServer Commerce sample site.

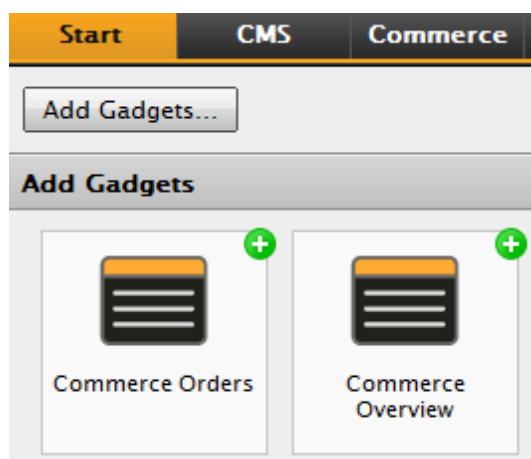


Commerce Orders Gadget

The **Commerce Orders** gadget displays orders statistics in the form of a sales graph and a list of purchase orders in a time interval of your choice.

Do the following to add and configure the Commerce Orders gadget:

1. Log on to EPiServer Commerce and select **Dashboard** in the right-click menu.
2. Select the Dashboard tab under which you want the gadget to appear.
3. Select **Add Gadgets** in top left corner of the dashboard, and then select the **Commerce Orders** gadget by clicking on it in the list. The gadget will be displayed on the dashboard. By default, it will be updated to display new data every 30 seconds.
4. To update the refresh interval, select **Edit** in the drop-down menu of the gadget, and enter a new time interval. Click **OK** to save you changes.

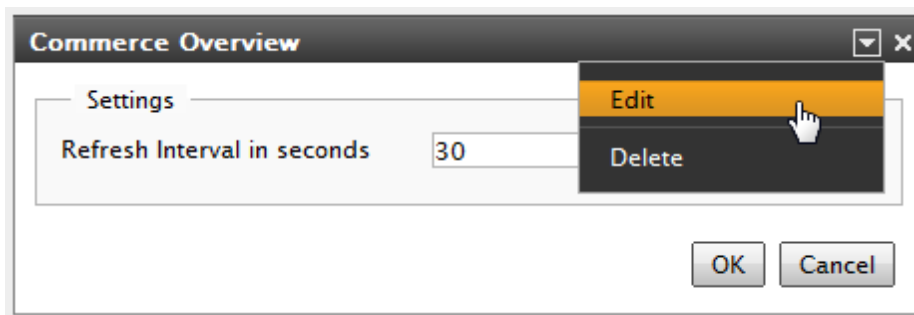


Commerce Overview Gadget

The **Commerce Overview** gadget shows sales data from the e-commerce system. The data is grouped by products, categories, orders, customers and promotions.

Do the following to add and configure the Commerce Overview gadget:

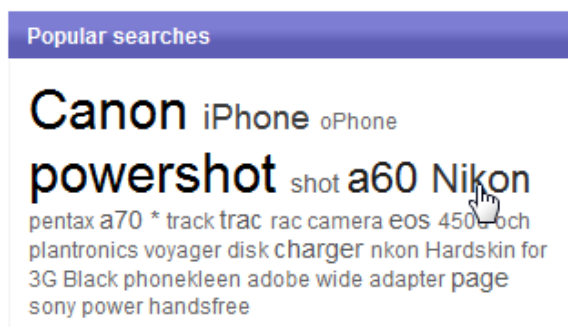
1. Log on to EPiServer Commerce and select **Dashboard** in the right-click menu.
2. Select the Dashboard tab under which you want the gadget to appear.
3. Select **Add Gadgets** in top left corner of the dashboard, and then select the **Commerce Overview** gadget by clicking on it in the list. The gadget will be displayed on the dashboard. By default, it will be updated to display new data every 30 seconds.
4. To update the refresh interval, select **Edit** in the drop-down menu of the gadget, and enter a new time interval. Click **OK** to save you changes.



Managing the Tag Cloud

"Tags" are words describing the content of a website. A "tag cloud" is a visual depiction of tags on the site. In a tag cloud the importance of a word is shown with font size or color. Tags are also **hyperlinks**, and clicking on a tag will display content marked with that particular tag.

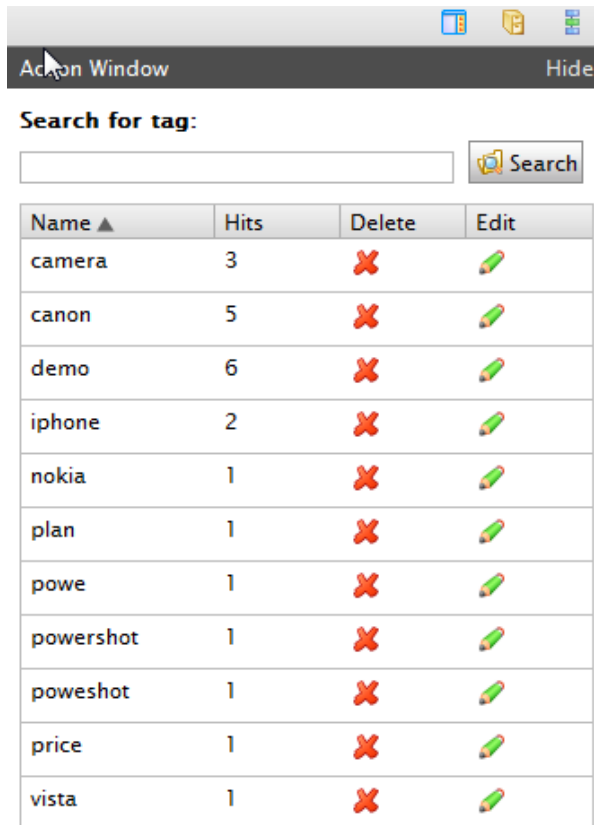
The tag cloud in EPiServer Commerce is a **search tag cloud** generated by users when searching for an item on the site. The more popular a search phrase is the more highlighted it will be in the search tag cloud. The search tag cloud on the sample site is displayed under the "Popular searches" part of the mid-section of the start page.




The EPiServer Commerce sample site comes with a **tag cloud plugin** for managing the tag cloud. This is accessed from the **Action Window** of EPiServer CMS. From the **Tag Cloud Management** section in the Action Window, you can manage the tag cloud list items, and perform tasks such as updating the name and hit count for a tag, or delete a tag.























Listing tag cloud items

1. In EPiServer CMS Edit mode, open the **Action Window**.
2. In the Action Window, click **Tag Cloud Management**. A list of existing tag cloud items will be displayed.



Search for tag:

 Search

Name ▲	Hits	Delete	Edit
camera	3		
canon	5		
demo	6		
iphone	2		
nokia	1		
plan	1		
powe	1		
powershot	1		
poweshot	1		
price	1		
vista	1		

As default, 20 tags will be displayed at the time in the list. Click on the paging section in the footer of the list to navigate to between pages of the list.

Sorting the tag cloud list

The tag cloud list can be sorted by tag name or by hit count. Click column headers **Name/Hits** to sort in ascending or descending order.

Searching for a tag

To search for an existing tag, enter part of or the full tag name, in the **Search for a tag** field at the top of the tag list.

Updating a tag

To update a tag, click the **Edit** symbol next to the tag in the tag list. You can change the tag name and you can update the hit count number for the tag. Click **Save** to update the changes. Note that each tag must have a unique name.

Deleting a tag

To delete a tag, click the **Delete** symbol next to the tag in the tag list. Click **OK** to confirm the deletion.