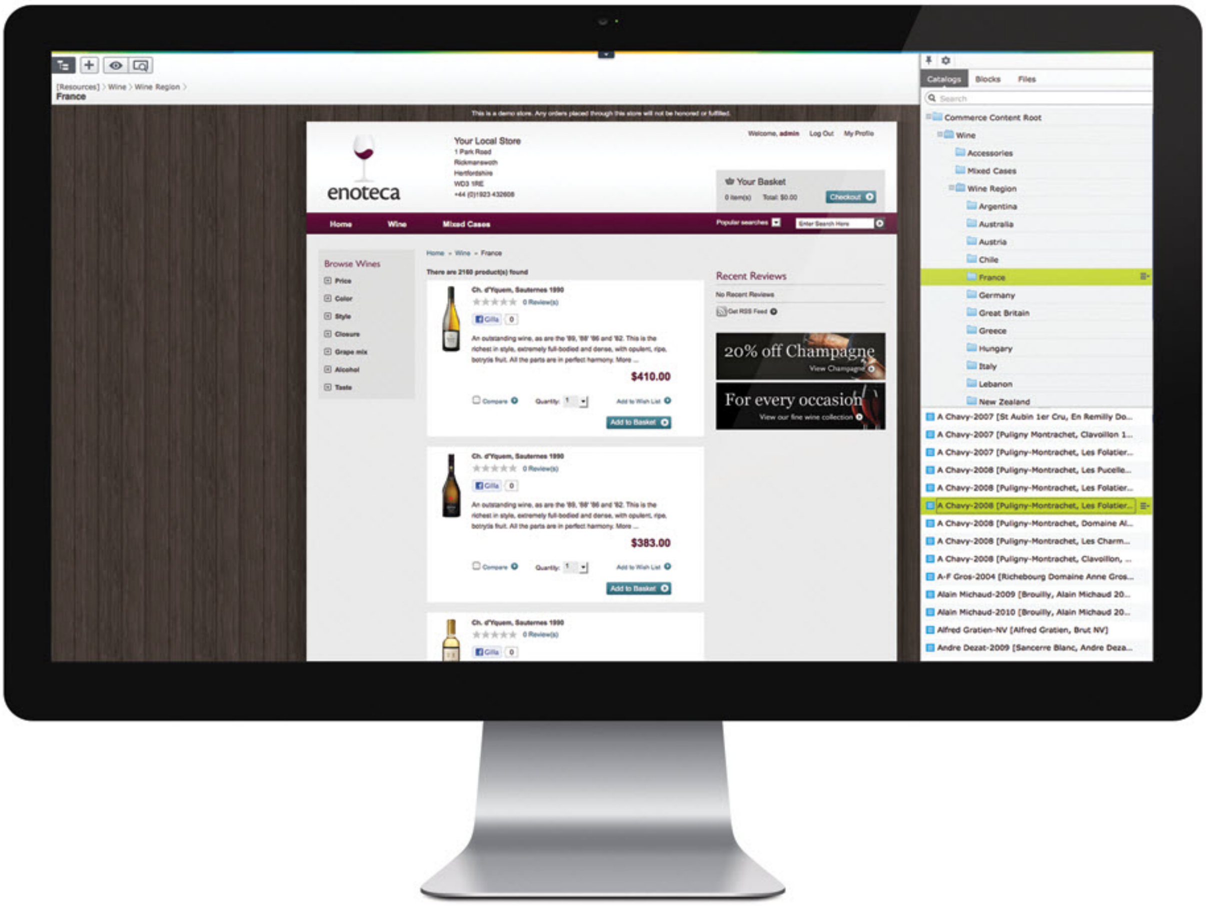
COMMERCE



User Guide

Version 1 R3

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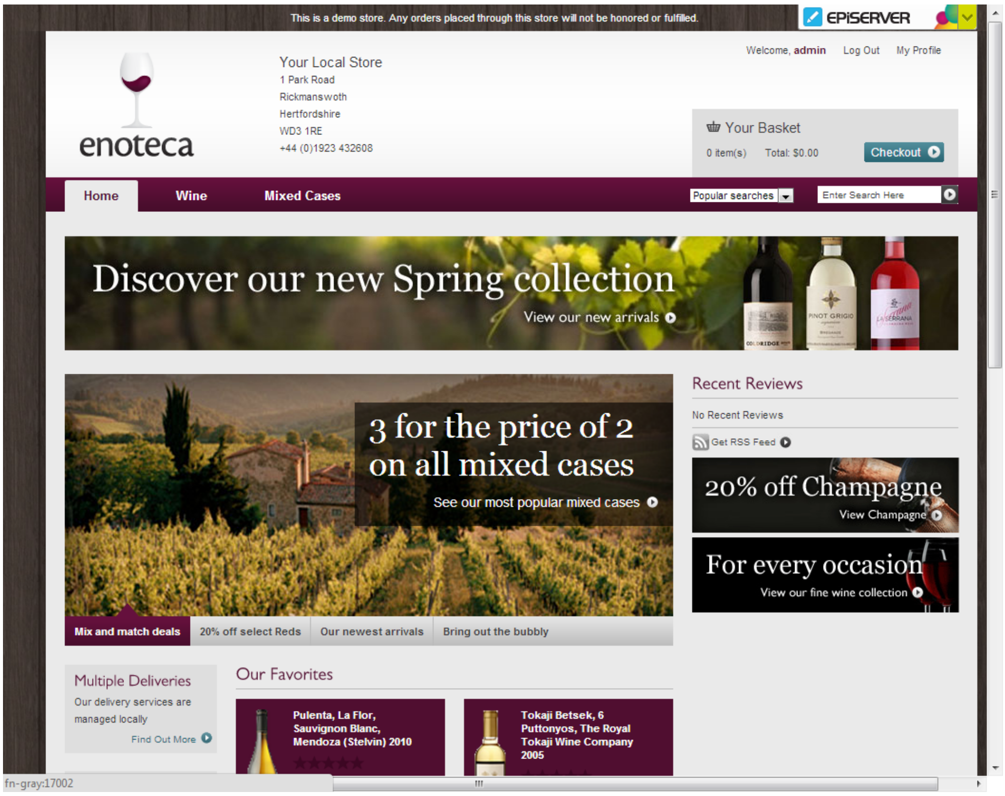
Introduction

This is the **User Guide for EPiServer Commerce**, a state-of-the-art solution for building e-commerce websites. With EPiServer Commerce you can quickly create and deploy a flexible e-commerce website, combining powerful content display with advanced back-end online store management.



This user guide provides guidance to the usage of the various functions of EPiServer Commerce, both within web store administration as well as content management for your e-commerce website. The purpose of the EPiServer Commerce, sample site, which is described here, is to provide an example of how you can work with EPiServer Commerce,, in order to get your web store up and running in as little time as possible.

To find out more about how to integrate and extend the functionality of EPiServer Commerce,, please refer to the *technical documentation for EPiServer Commerce*.

About This Documentation

Target Groups

The EPiServer Commerce User Guide is intended for the target groups as described below.

- Marketers and merchandisers creating website content and campaigns.
- Content editors and system administrators, creating content and administering the website.
- Administrators working with online store procedures such as customer and order management..

References

This documentation describes features in EPiServer Commerce. Features in other EPiServer products will not be covered here. Therefore, the following documentation available from world.episerver.com, may be useful for reference purposes:

- User documentation for editors of EPiServer CMS.
- User documentation for administrators of EPiServer CMS.
- SDK for EPiServer CMS and the EPiServer Framework (for developers).

Accessing EPiServer Help System

You can access the web help from the Global Menu. Click the **?** icon and select the system for which you want to view the help. Browse or search for the topic where you need guidance.

You can also access the web help by browsing to *EPiServer Web Help*.

Online Community on EPiServer World

EPiServer World is an online community where you can find the latest product information. It is open to the public, for partners, customers, and everyone working with EPiServer products, such as editors, webmasters, site owners and developers. Here you can download material, participate in discussions, read articles, receive support and much more. Feel free to sign up as a member.

Copyright Notice

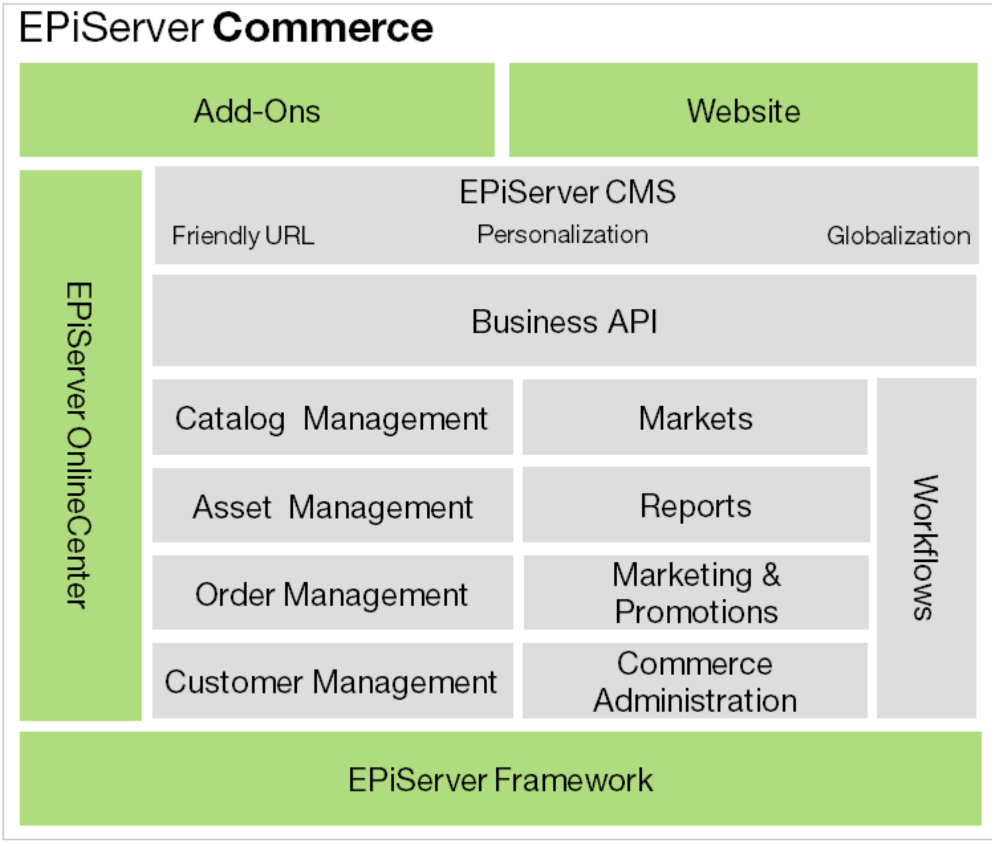
About EPiServer Commerce

Introduction

The foundation of EPiServer Commerce is an **e-commerce core** for web store management, and EPiServer CMS for content presentation.

The EPiServer platform contains common functionality shared by all EPiServer products:

- **Add-ons** - access to both EPiServer add-on modules, as well as third-party add-ons.
- **OnlineCenter** - "entrance" to the website dashboard and integrated systems, with gadgets and access to website edit/admin interfaces.
- **Framework** - with data storage, localization services and global search.



EPiServer Commerce contains the following parts:

- Complete **e-commerce management** features:
  - Business API for integration
  - Workflows based on Windows Workflow Foundation (WWF)
  - Order, Catalog, Customer and Asset Management
  - Multi-market management
  - Marketing & Promotion
  - Reporting functionality
  - Administration interface

- **EPiServer CMS** providing content management functions such as globalization, personalization and content providers for product display.
- A sample site with a set of **page templates** and **blocks** with examples of how to work with and display content and illustrate e-commerce procedures for both B2B and B2C businesses.

The EPiServer Commerce Sample Site

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. Refer to the *Sample Site* section for more information.

Function Overview

Introduction

This section provides an overview of the functionality of EPiServer Commerce. This contains features for both back-end administration of the online store as well as for managing and displaying specific content for e-commerce, such as presentation of catalogs and product items.

The documentation describes a **sample installation** based on the sample 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 systems.

Store Management

Administering and Configuring the Store

Settings includes various administrative and configuration tasks such as setting up shipping and payment gateways, your default language, currency, units, tax configuration, licensing, and search settings.

Administrating Users and Customers

Users and customers are managed by the *Customers* 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 administrative parts, and depending on their permissions will have varying access to the systems and menu items within each system.

Catalogs and Product Entries

The *Catalogs* system provides users with the ability to manage catalogs, product categories and 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 Enoteca sample site includes a sample catalog with products, SKUs, and packages.

Purchase Orders, Shopping Carts, Shipping, and Returns/Exchanges

The *Orders* system is where you can monitor, track, change or create new orders, ship out items, and create returns/exchanges. Orders are highly flexible, giving internal users the ability to create purchase orders with various options including split payments, split shipping, and split shipping addresses.

Customer Campaigns, Promotions, and Discounts

The *Marketing* system handles for instance 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.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. Marketing teams also have the ability to target specific customer segments by region, individual customers or customer groups.

Assets Management

The *Assets* system allows for assets such as images, MP3s, PDFs, software packages and other downloadable files to be centrally stored and available from either the public site or from inside EPiServer Commerce.

Content Management

Working With Content

Marketers, merchandisers and editors will work from the EPiServer CMS editorial interface to create and update content. Perhaps you want to *create a campaign or a landing page* and *display products from the product catalog*. Or maybe create news or an article with content related to the products in your online store. EPiServer CMS has functionality allowing editors to drag-and-drop content blocks or pages into the content area of another web page, making it easy to create dynamic websites putting important content in focus.

Administering the Website

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

Fore more information on the functionality and how to use EPiServer CMS, refer to the *user documentation for EPiServer CMS*.

Roles

Introduction

E-commerce solutions with online stores can be set up in many different ways, depending on the purpose they serve. An EPiServer Commerce sample installation is based on a setup of certain roles with specific tasks and access rights. The description in this documentation reflects these roles in order to make it easier to understand the underlying work procedures.

Visitor

A **visitor** in this context is a customer using a web browser to visit the website with purchasing intentions ("shopper"). In a standard installation of EPiServer Commerce (B2C), purchasing can be done either anonymously or by registering an account. Registered visitors can also contribute to the website content by rating and commenting on products.

Merchandiser

The **merchandiser** typically works with all stock on the website to ensure that the strongest products are put in focus, This role also creates landing pages, sets product pricing and coordinates cross-product selling. Furthermore, this role may also oversee delivery and distribution of stock and deal with suppliers.

Marketer

The marketer creates content and campaigns with targeted banner adverts to ensure customers have consistent onsite experience of the various marketing channels. Furthermore, the marketer monitors campaign KPIs to optimize page conversion.

Store Administrator

The **store administrator** works with information related to customers, orders and products. Store administrators may also work with configuration and system settings. Depending on how the organization is set up, the store administrator role may be sub-divided into sub-roles with specific access rights and tasks:

- **Order Supervisor** - full permission for the entire order management.
- **Order Manager** - creates returns and exchanges, edits orders, sends notifications, processes payments and split shipments.
- **Shipping Manager** - handles packing and completion of shipments.
- **Receiving Manager** - handles shipments and returns.

System Administrator

In the EPiServer Commerce back-end system, this **administrator** role has extensive administration rights in areas such as assets, catalogs, core functions, marketing and customer and order management.

Website Administrator

The **website administrator** is someone responsible for administrative tasks for the website, including the setting of access rights for editors on the website. Can also define visitor groups used by editors when creating personalized web content for target groups. Usually has full access to both the editorial and administrative interfaces in EPiServer CMS.

Website Editor

Someone creating and editing content on the website with access to the editorial interface. **Editors** can be either frequent editors or occasional editors, and they may or may not have publishing rights.

Website Owner

The **website owner** is someone with an overall responsibility for one or more websites. Creates content occasionally, approves and publishes content created by others, and uses OnlineCenter and gadgets to monitor website activities. May also be an e-commerce manager.

Refer to *Access Rights* for more information on access rights for different roles in EPiServer Commerce.

Shopping Workflow

Introduction

There are many different types of e-commerce websites, however the two most common ones are:

- **Business-to-Consumer (B2C)** - typically designed for selling goods and services to consumers.
- **Business-to-Business (B2B)** - used to build strategic relationships with other businesses, and to ease the supply and procurement processes that characterize trade among those organizations.

Sites can also have multiple roles, and a single site can provide several functions. EPiServer Commerce is a flexible platform allowing for seamless integration with external systems such as financial, CRM, inventory, warehouse and customer service systems.

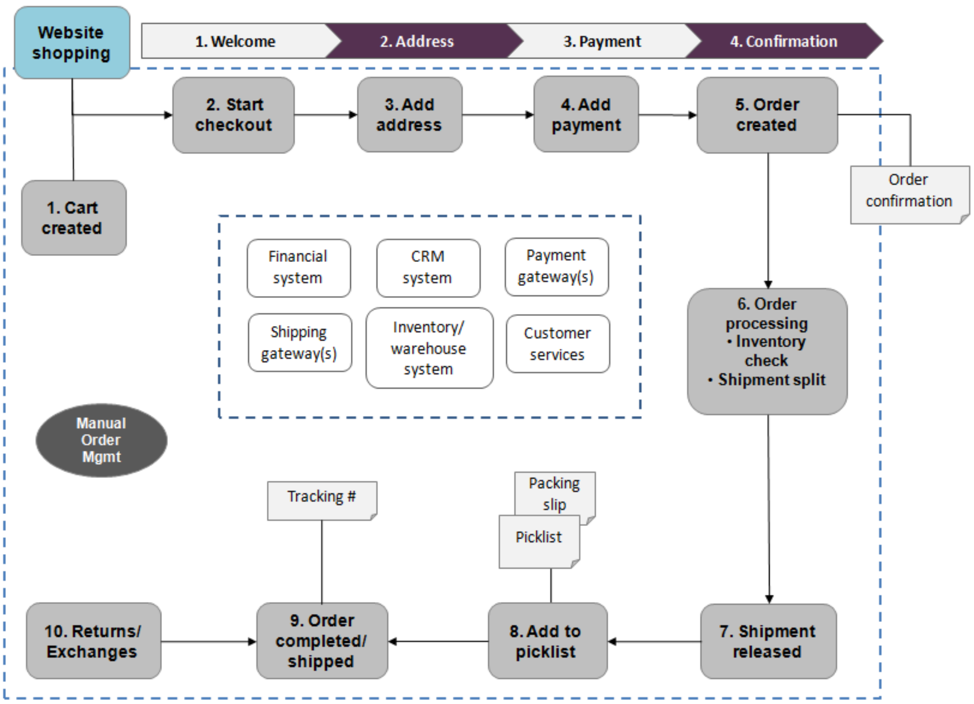
Depending on how you choose to work with editorial content and your online store administration, you will define your user roles and groups, and give them access rights to the different parts. Example of user roles in EPiServer Commerce are content editors, marketers, business owners, and store and system administrators.

Step-by-Step Process

A typical "shopping workflow" involves a number of interactions between a "shopper" on the website, EPiServer Commerce, and any integrated external system.. Depending on how the system is set up, the shopping workflow can be fully automated so that it requires little manual attention. However, a purchase order can always be monitored, accessed and handled manually from the **Orders** system if needed.

In the following we will describe an example of a shopping workflow and the actions and tasks involved. This example is mainly based on a standard installation of EPiServer Commerce, which is a B2C type of e-commerce site.

Shopping Process



1. **Cart created**
   In this example, a shopper does not need to register on the site in order to buy. The order process actually starts as soon as the shopper selects a product and adds it to a shopping cart. A **cart** (basket) will be created and saved in the system, and can be viewed in Orders under "Carts". If the shopper doesn't complete the checkout procedure, the cart will remain in the system for a specified time.

   When the shopper returns to the website, the cart will be "remembered" and made available for continued shopping. Already in this early step the system will perform an **inventory** and **pricing** check, to look for availability in the **warehouse**, as well as **discounts** for selected products in the cart. This will be updated if and when the shopper returns to the cart at a later stage.

2. **Start checkout**
   When the shopper decides to complete the purchase and chose to "proceed to checkout", the first step of the **checkout** procedure is initiated.
3. **Add address**
   In the second step of the checkout procedure, the **shipping and billing address** information is added together with the preferred type of delivery (First class/Express etc). The address information can be entered manually by an "anonymous" shopper, or automatically if the shopper is logged in and has a registered user profile with address information. The system can also be set up so that it is possible to **split shipments** in different parts and to different addresses here.
4. **Add payment**
   In step three of the checkout procedure, the **payment** is added to the "purchase order to be". The system will calculate the total sum including the purchase amount and the **shipping fee**. In this step the shopper selects a payment method, for instance by credit card or PayPal. The payment will be registered and verified. This may happen instantly or after a certain specified time, depending on how the payment process is set up and the type of e-commerce solution (B2C or B2B). In this step it is also possible to **split payments**, if the system is configured for this.
5. **Order created**
   Usually the actual **purchase order** is created in the system when the payment is settled. In the last checkout step, a purchase order number is created, the shopper confirms the purchase, and an order confirmation is sent to the shopper. The shopping cart is now converted to a purchase order which is visible with status "In Progress" under "Purchase Orders" in Orders.
6. **Order processing**
   When the order is created the order processing starts. This consists of steps to check the warehouse and inventory status for the products in the order, and for creating the actual **shipment**. Depending on the inventory status for the products, the order may be split into more than one shipment.
7. **Shipment released** - when the shipment is verified, it will be **released**. The purchase order will now appear in Orders, under "Shipping/Receiving" and "Released for Shipping".
8. **Add to picklist**
   This steps involves the addition of the shipping items to a **picklist**. The picklist is the list that the warehouse will use to create the **physical shipping** of the products in the order. This step will also produce a **packing slip**, which is the paper slip that will be attached to the physical package to be shipped.
9. **Order completed/shipped**
   When the picklists with the different orders and their respective packing slips have been created, the order will be set to **completed**. In the system this involves the creation of a shipment validation number which is associated with **tracking number**. The tracking number can be entered manually or automatically, if such an integration exists. The tracking number connects the physical package with the shipping provider for the delivery, and is used for tracking the package on its way to the delivery address. The purchase order will now appear in Orders under "Purchase Orders" again, with status "Completed".
10. **Return/Exchanges**
    Only completed orders can be subject to **returns/exchanges**. Depending on how the system is set up, returns can be created automatically or manually. Creating a return usually involves replacing a delivered product with another one in **exchange**, and/or a payment **refund**. When the return is created it will appear in Orders under "Shipping/Receiving" and "Returns". Order status can be for instance "Awaiting Exchange".

    If the return involves replacement of a new product, the shipping procedure will be initiated again.

The return may also involve receiving a faulty product, in which case a receiving procedure is initiated involving the acknowledgement of a receiving receipt for the returned product.

Integration with External Systems

EPiServer Commerce is a flexible platform built for integration with other business systems needed in an e-commerce environment. These systems are typically integrated with various parts of the shopping workflow, for exchange of data with EPiServer Commerce.

Examples of such external systems:

- **Financial system** - for instance invoice management, payment refunds,and sales reporting.
- **CRM system** - for management of customer profiles and address information.
- **Payment gateways** - the setup of different payment solutions for instance credit cards and PayPal.
- **Shipping gateways** - the management of shipping providers and exchange of tracking information.
- **Inventory/Warehouse system** - exchange of inventory information in connected warehouses.
- **Customer Services** - exchange of for instance order status information.

Through the EPiServer Add-on Store you also have the possibility to extend your EPiServer Commerce solution with additional modules from EPiServer and third-party providers. The Add-on Store is available from the ***Add-on*** *option in the EPiServer global menu*.

Getting Started

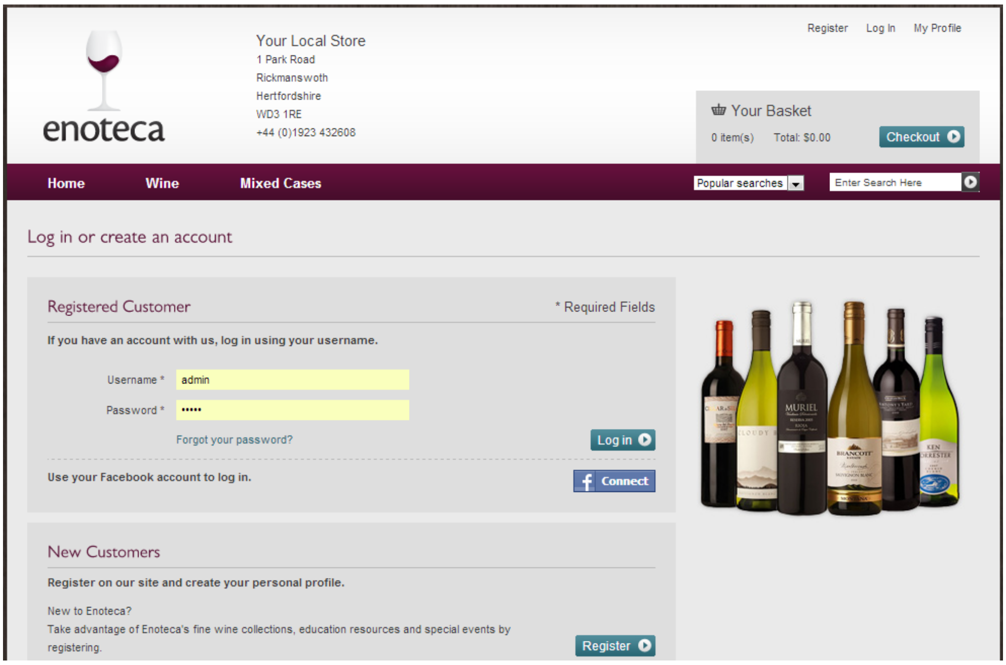
Introduction

This section describes how you can log in to an EPiServer Commerce website, and access and navigate the different modes. Note that the login procedures may be different from what is described here, depending on how your website and infrastructure is set up. The examples described here are based on a standard sample installation of EPiServer Commerce.

Logging In

As an editor or administrator, you usually log in to your website using a specified URL or a log in button. On the EPiServer Commerce sample site, clicking **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**.

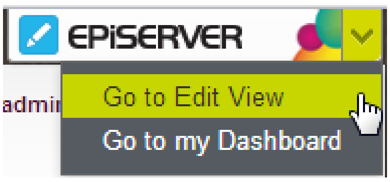
Note that this login page is the same for both customers logging in to their account, as well as for web editors and store administrators logging in to work with content or administer the online store parts. What you are allowed to do after you have logged in, depends on your *access rights*.



Access Options

When logged in to your EPiServer Commerce website, you will have some different options to chose between, depending on your access rights. In the examples in this documentation we assume that you have full permission to the different parts of the EPiServer Commerce website.

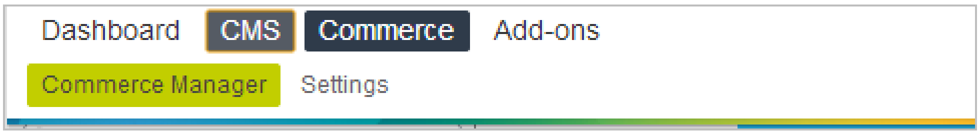
You access EPiServer Commerce through the Edit View. Select **Go to Edit View** and proceed to the editing view.



You can also go directly to your personal dashboard by selecting the **Go to my Dashboard** option.

Navigation

When logged in, use the **global menu** available at the very top to navigate your way around. In the menu you will find the different systems integrated with your e-commerce website. From here you can select **Commerce** for store administration, or **CMS** for *managing website content*.

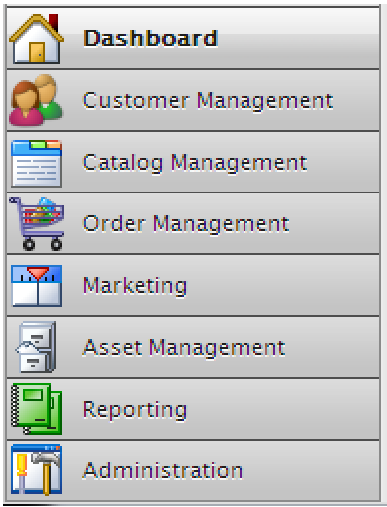


Selecting **Commerce** in the global menu will expand a submenu where you can select **Commerce Manager** *to work with e-commerce management*. The **Settings** option, will take you to a settings screen where you define specific site settings.

The options you see may vary depending on your access rights. In the examples in this documentation we have assumed that the user has full permissions to all functions in EPiServer Commerce.

Commerce Manager

This section explains how end users can administer e-commerce tasks through the EPiServer Commerce back-end **Commerce Manager** system. Commerce Manager includes a number of sub-systems for managing the different parts of the online store system. The sub-systems are configurable, the setup described here is that of the EPiServer Commerce sample site.



Dashboard

Introduction

The dashboard is the area within Commerce Manager where you will find general status information about your EPiServer Commerce application. The purpose of this area is to give administrators an "at a glance" view of updates and status of the site or sites that are running on that particular instance of EPiServer Commerce.

Dashboard View

The dashboard is an aggregated view of a site's status. Typically, the dashboard is the first screen seen that a user sees when he/she logs into Commerce Manager. This is the area where a user can get a quick overall snapshot of e-commerce 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

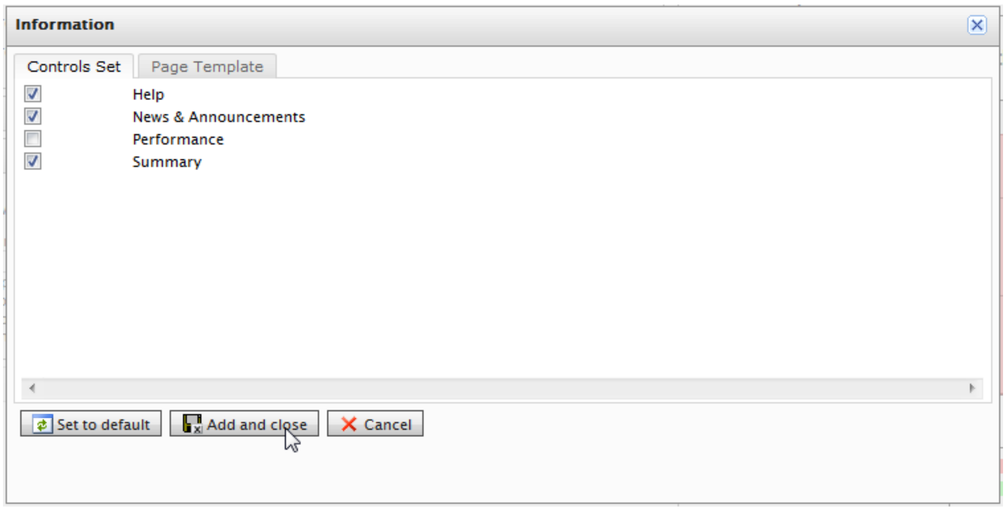
You can customize the dashboard by re-arranging the layout of the controls ("widgets" or components) on the page. You can arrange the controls and adjust the page template that is used for the dashboard. The following controls are available: **Help**, **Summary**, **News & Announcements**, **Alerts**, and **Performance**.

Control	Description
Help	Allows users to search for help topics that links directly to the EPiServer Commerce webhelp 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.
Summary	Displays the total number of **Products**, **Categories**, **Orders**, **Customers**, and **Promotions** .

Control	Description
News & Announcements	Displays a feed of the latest blogs from EPiServer World.
Alerts	Displays warnings about each site that may hinder performance and sales, such as the lack of site analytics installed on the site .
Performance	Displays a **Sales Graph** and a graph for the **Total Sales** of the year.

Adding Controls and Adjusting the Page Template

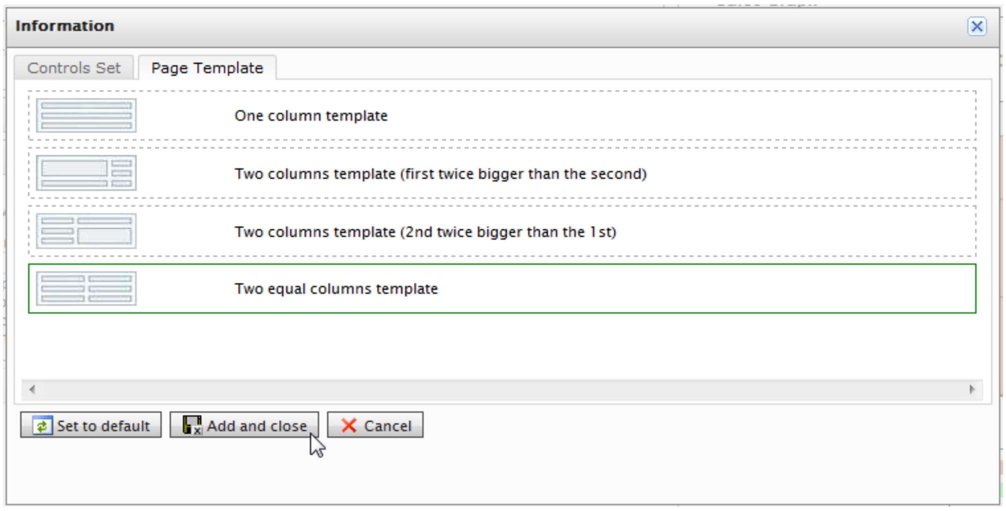
Click on **Add** on the Dashboard page. The **Information** form pops up above the Dashboard page.



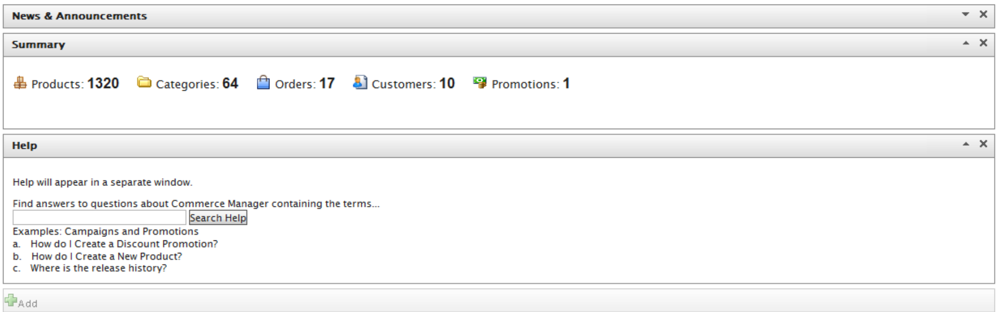
The **Controls Set** tab allows you to select which Controls you want to add to the Dashboard. Check the boxes and then click on **Add and Close**. The Controls you selected will appear on the Dashboard.

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**.

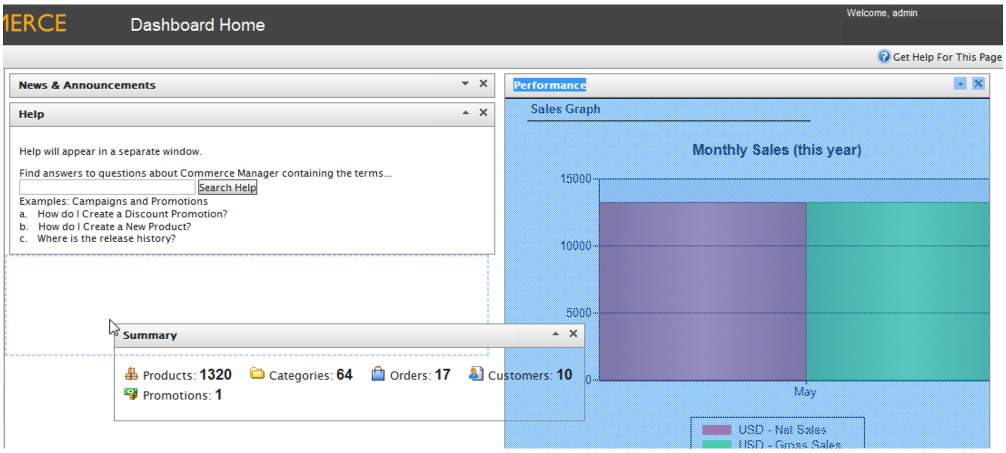


The screen below is an example of how a **One column template** looks.

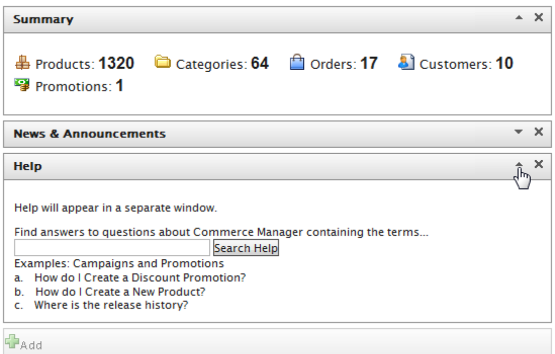


Rearranging, Collapsing, and Removing Controls

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.

Customer Management

Introduction

The **Customer Management** system is the Customer Relationship Management System (CRM) within EPiServer Commerce. Customer Management is comprised of **Organizations**, **Contacts**, and **Roles**. Customer Management can be used to organize both internal business users and customer groups. Furthermore you can control both end-users and employees within your company that use the system.

Utilizing the hierarchy you can create with organizations, sub-organizations, contacts, and roles you can segment all users of the system into the desired groups.

- *Organizations* - organizations are structures that allow you to divide, separate and manage all of the users that are in your system. Organizations can also have suborganizations to further classify your users.
- *Contacts* - contacts are individual persons that are added to your Customer Management system. They also contain all the information for a person's account, which allows them to interact with the system based on their account and role.
- *Roles* - roles in the Commerce Manager back-end system, are classes that you setup in order to give specified users certain accessibility and permissions. Certain roles come out of the box and roles can be created, edited and deleted to fit your needs. It is useful to set up roles to coincide with organizations within your Customer Management system, since that will allow you to more easily manage your users and organizations. Roles are completely separate from users and organizations, so how you choose to divide your roles will be up to you.
- ***Gift cards*** - on the EPiServer Commerce sample site, gift cards are administered from Customer Management. *Gift Cards are described in more detail under Payment Methods*.

Customer groups can be leveraged by *Marketing* for special promotions, pricing, etc. As with any part of the EPiServer Commerce, you can always choose to integrate with a third party CRM.

Working With Customer Management

Planning Organization Hierarchy

One of the first things you will want to do is to plan your organization hierarchy so that your organizations, contacts and roles ready for input. You can create **Organization Hierarchies** by creating parent-child relationships between organizations. For example, creating your Organization Hierarchy for your internal Administration you can create a the hierarchy of organizations being Administration > EU Headquarters > EU Management.

You may then associate **Contacts** with the appropriate level of the Organization Hierarchy. Permissions can be set to determine which users can view certain Organizations in the hierarchy as well. The same principle applies for creating hierarchies for customer groups. For example, you could have a customers organization with sub-organizations of Gold, Silver, and Bronze level customer groups. You could then leverage those customer groups to display different prices for each of your valued customer groups.

Creating Organizations and Contacts

Organizations are structures that allow you to divide, separate and manage all of the users that are in your system. Contacts are individual persons that are added to your Customer Management system. They also contain all the information for a person's account, which allows them to interact with the system. When users register on the front-end of the site (for example to make a purchase) they automatically get a Contact made for them and an account created that they setup. For more information see *Organizations* and *Contacts*.

Using Roles and Permissions

Roles allow you to give users access to different parts of the system with varying levels of permissions. For example, a marketing person within your organization may be able to draft new pages, and their marketing director must be the person to approve it. Users are able to have multiple roles within the system. For more information see the *Roles* section.

Organizations

Introduction

Under **Organizations**, Commerce Manager users can create new organizations. Organizations can be categorized into different types such as **organization** or **organization units** (for example 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 subunits 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.

Working With Organizations

The work with organizations includes the following tasks:

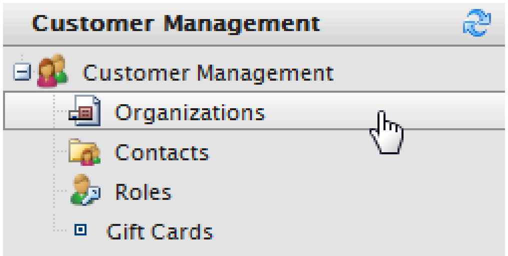
- *Creating organizations and organization hierarchies*
- *Browsing and viewing existing organizations*
- *Managing company accounts for a B2B scenario*
- *Editing and deleting existing organizations*
- *Defining dictionary values for organization types and business categories*

Browsing and Viewing Organizations

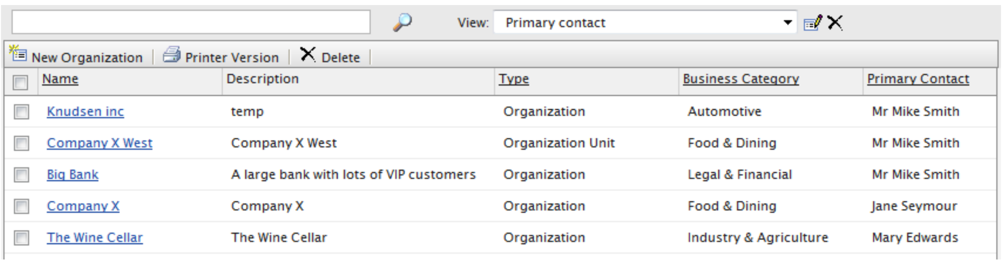
Browsing Organizations

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

To browse organizations, go to **Customer Management** and select **Organization** in the left menu.



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



Name	Description	Type	Business Category	Primary Contact
Knudsen inc	temp	Organization	Automotive	Mr Mike Smith
Company X West	Company X West	Organization Unit	Food & Dining	Mr Mike Smith
Big Bank	A large bank with lots of VIP customers	Organization	Legal & Financial	Mr Mike Smith
Company X	Company X	Organization	Food & Dining	Jane Seymour
The Wine Cellar	The Wine Cellar	Organization	Industry & Agriculture	Mary Edwards

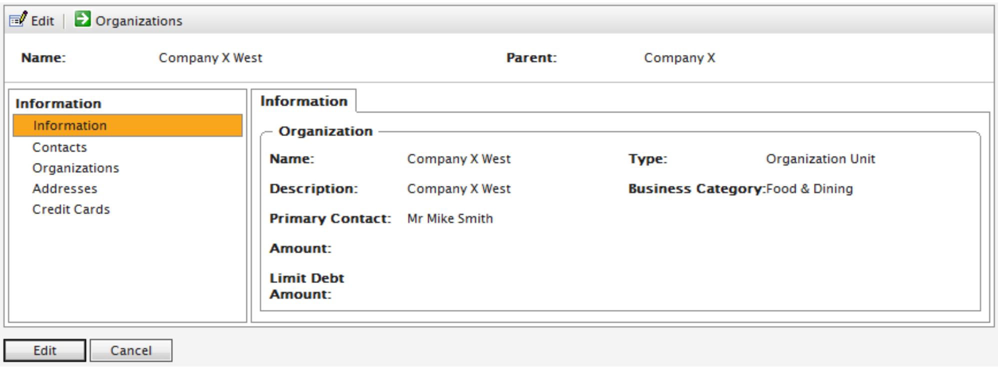
In this view, the organization details displays the following information:

Field	Description
Name	Name of the organization

Field	Description
Description	Additional details of the organization
Type	The kind of organization it is
Business Category	Under which category the organization falls
Primary Contact	The main contact person for the organization

Viewing Organization Details

Selecting an organization in the list will display more detailed information about the type of organization and related contacts, organizations (parent/sub), addresses and credit cards.



Searching for Organizations

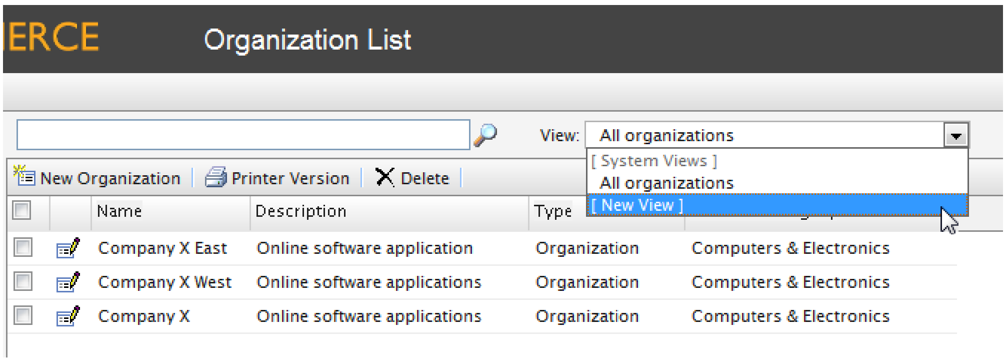
You can also use the search field on top of the **Organization List** to find specific organizations by name. To conduct a search, enter your search terms and click on the **Search** button. To conduct a new search, click on the **Reset** button to reset the form and enter new search terms.

Customizing Views for Browsing Organizations

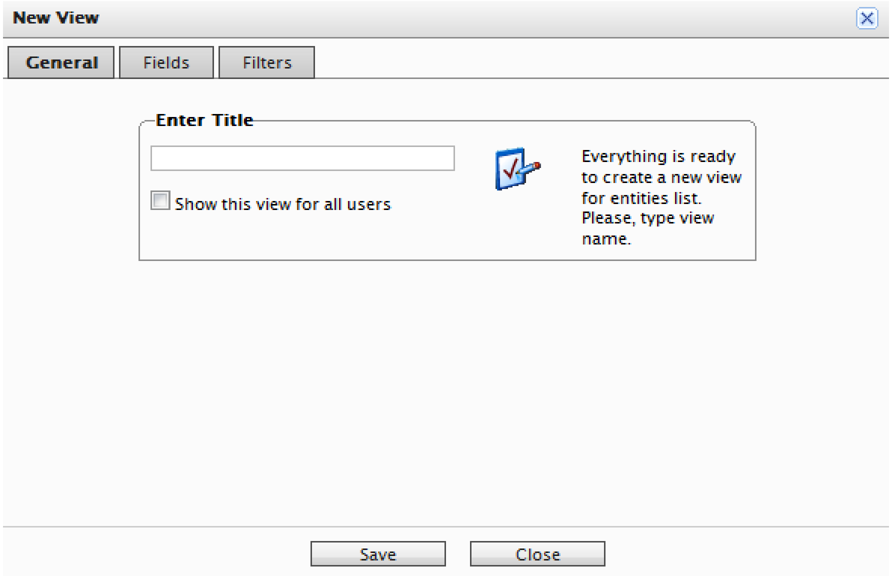
As an **Organization List** gets longer, you can create and customize views to filter the list. You define the columns you want to be displayed for the view, and the filters to be applied when selecting what to include in the view.

Do the following to create a new organization view:

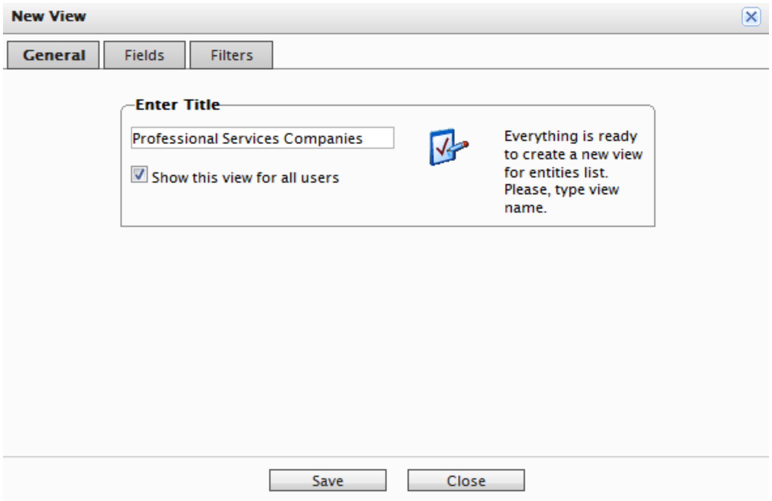
1. Click on the **View** drop-down menu and select "New View."



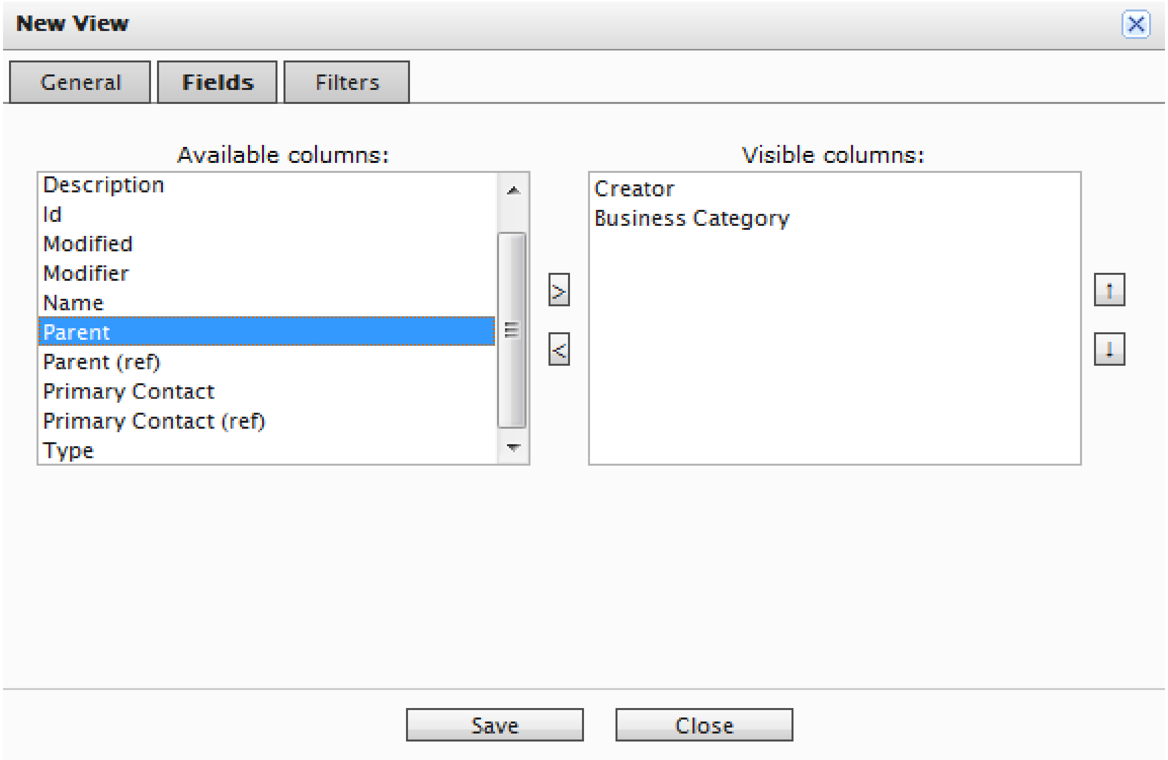
2. The **New View** dialog is displayed.



3. The default tab is **General**. Enter 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.

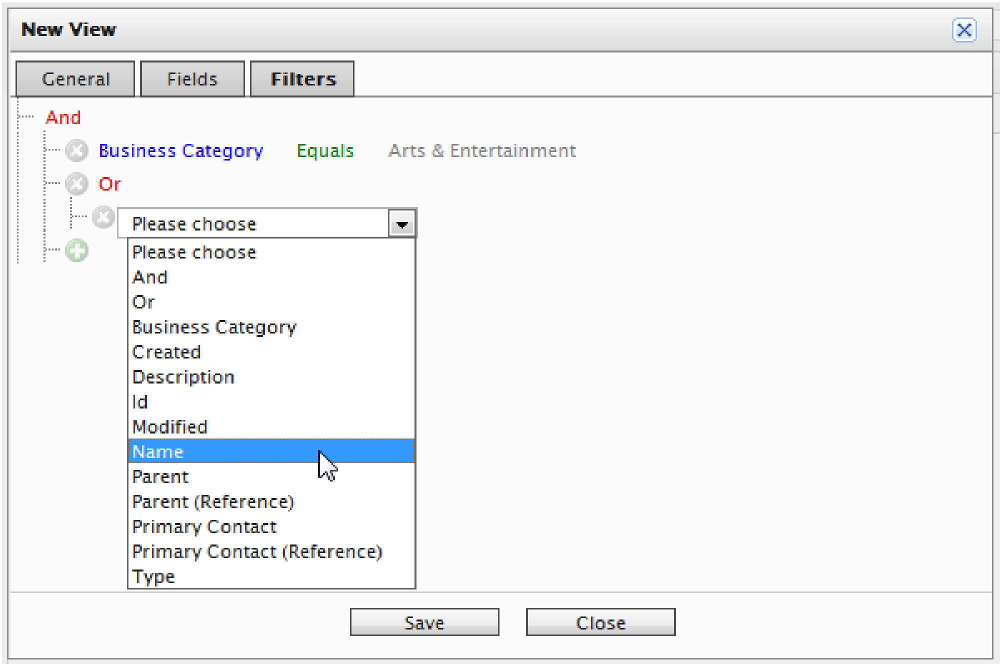


4. Click on the **Fields** tab to select which columns you want to appear in the custom view. Under **Available columns**, select the columns you want to appear by clicking and highlighting the column name and moving it over to the **Visible columns** list by clicking on the **Right Arrow** icon.



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 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.

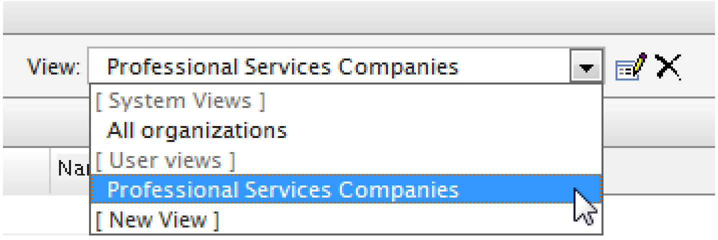
5. Click on the **Filters** tab to set the view filters. Clicking the **+** icon allows you add an additional filter.



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

Applying a View

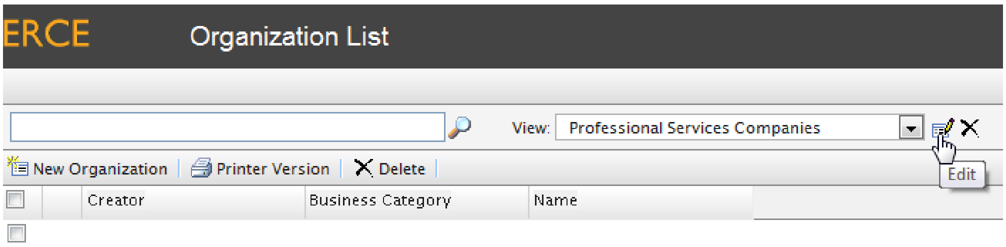
Once a View is created and saved, it appears in the **View** drop-down box.



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.

Editing and Deleting Views

To edit an existing view, select the view from the drop-down menu and click on the **Edit** icon next to it. The **View Editing** dialog is displayed and you can edit all properties.

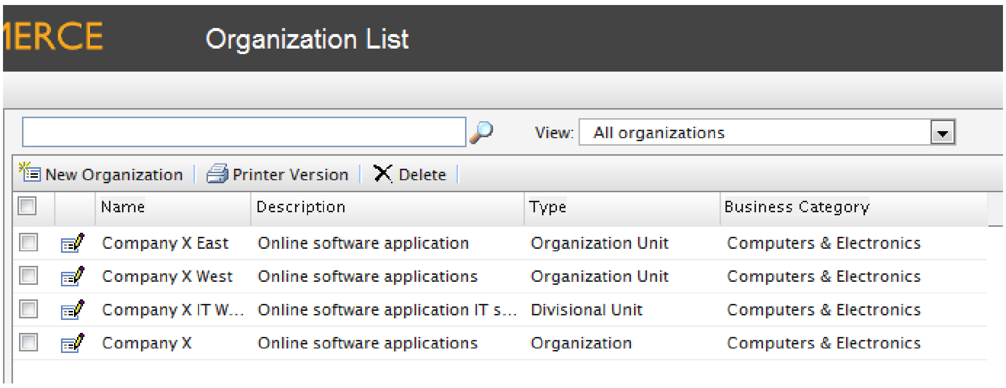


To **delete** a custom View, click on the **X** icon next to the **Edit** icon.

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

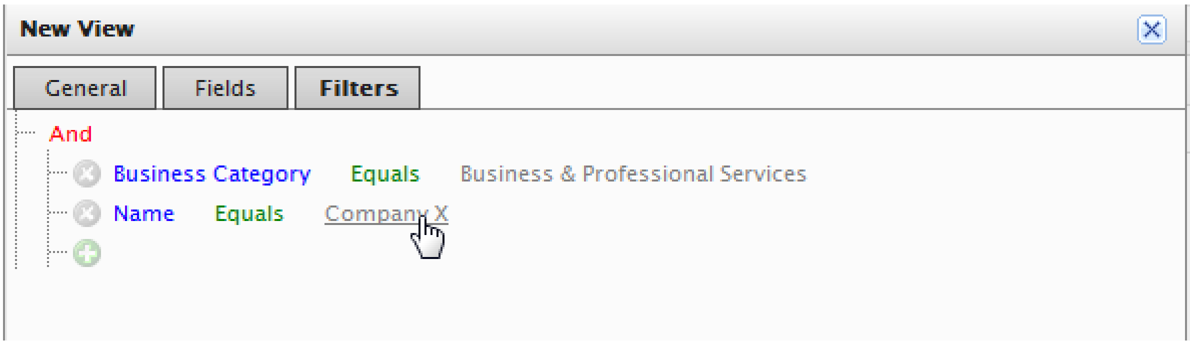
Customized View Example

In this example we will create a view that only shows organizations matching a business category and organization name. 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."

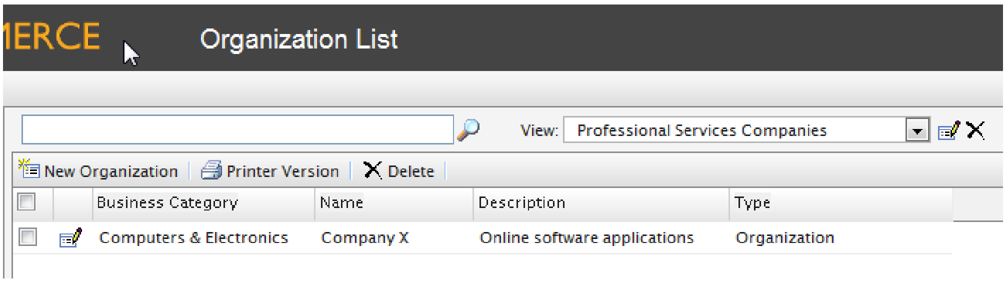


1. Click on the **+** icon and from the drop-down select "Business Category." Two fields, which default to "Equals" and "Arts & Entertainment," automatically appear. Click on "Equals" and a drop-down appears. Keep the field as "Equals." Click the field to the right of it and select a "Business Category" name (such as "Business and Professional Services").

2. 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."
3. In the next field, select "Equals" and then on the field that says "Text" enter in the name of the Organization.
4. Once done, click **Save** to save the View.



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.



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.

Creating Organizations

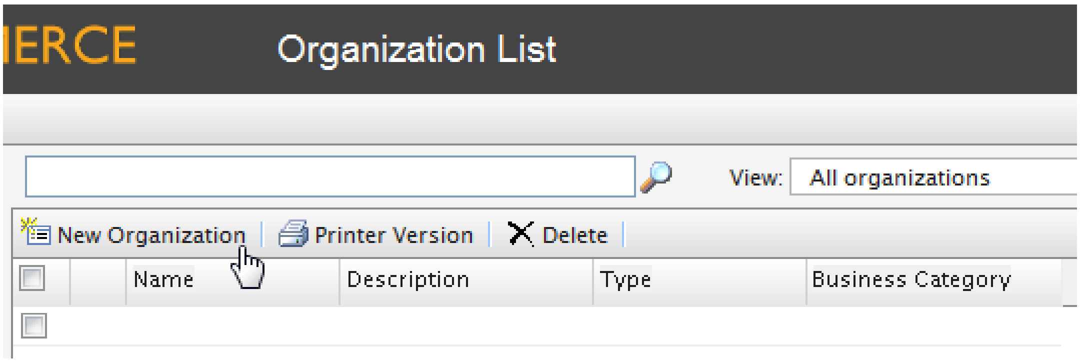
Introduction

In the following we will describe how to create an organization hierarchy with a "parent" and "child" organizations for your EPiServer Commerce site. The parent organization is of the type "Organization", and the suborganization will be of the type "Organization Unit" in the system.

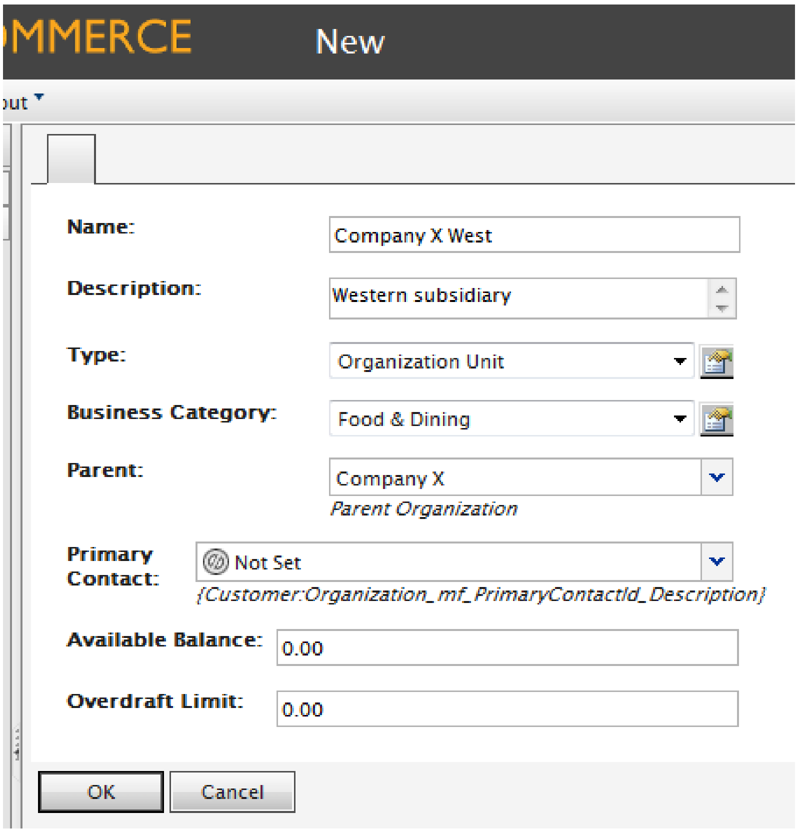
Creating an Organization or Organization Unit

These steps apply to both organizations and organization units.

1. Go to **Customer Management** and **Organizations**. You will be brought to the **Organizations** page which lists any existing organizations.
2. Click **New Organization**. This will lead you to a new screen to input data for your new Organization.



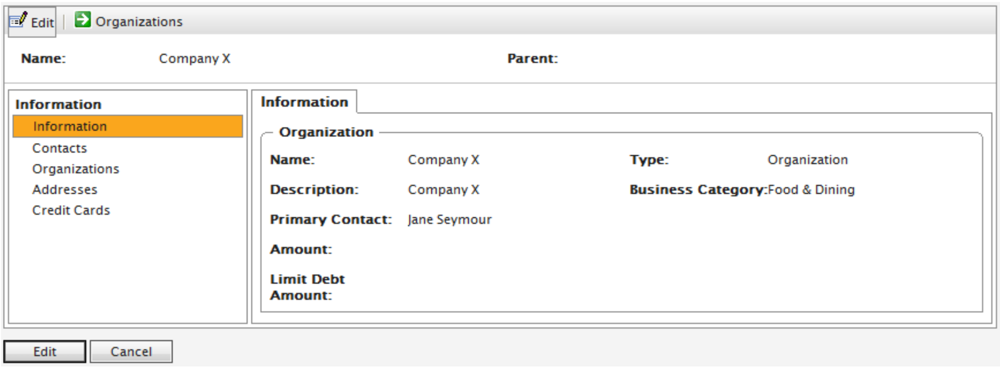
3. Enter data for the new organization, see below for available options.



Field	Description
Name	Enter in the organization name (this is the only required field).
Description	For additional details about the organization.
Type	Select from the drop-down menu to assign a type to the organization. If the organization is a **parent organization**, select "Organization", if the organization is a **suborganization**, select "Organization Unit". More types can be added to the drop-down by clicking on the icon.
Business Category	Select from the drop-down menu to assign a category to the organization. You can add more categories by clicking on the icon.

Field	Description
Parent	You can assign a parent organization to an organization. If the organization you are creating is a subunit (child) of a larger organization, then select the parent in the drop-down menu. If you do not see the Organization listed on the drop-down menu, click **More...**
Primary Contact	Name of main contact for the organization.
Available Balance and Overdraft Limit	Account settings related to a company account. For more information, refer to *Managing Company Accounts*.

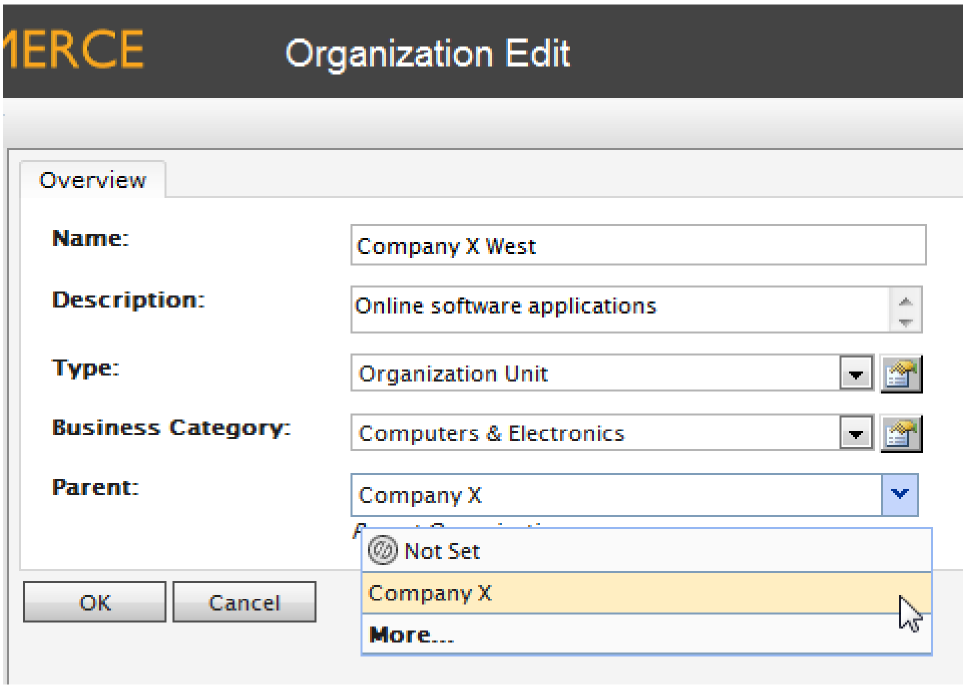
4. Save the organization by clicking **OK**. The **Organization Info** window of the organization appears. From here, you can view **Information** about the Organization you just created. Out of the box, you can also see associated **Contracts**, **Organizations**, **Addresses**, and **Credit Cards**. 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**.



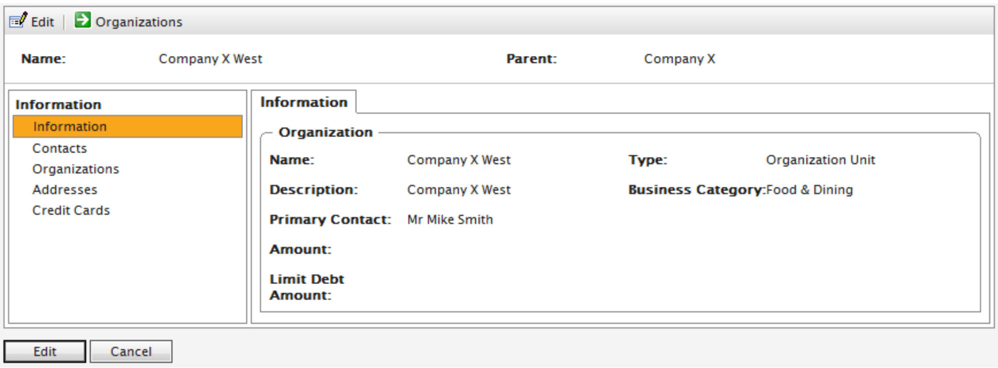
Creating an Organizational Hierarchy

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. In this example, "Company X" is the Parent Organization and "Company X West" is the Organization Unit.

1. Go to Organizations and click **New Organization**. Enter data for the organization (see previous section).
2. Under the **Parent** option, assign the desired parent organization ("Company X"). If you do not see the organization listed on the drop-down menu, click **More...**



3. Click **OK** to save the organization.
4. In the **Organization Info** page, the Organization Unit ("Company X West") becomes the child to the Organization ("Company X") you selected.



5. Repeat the steps above to create further organization units for the parent organization

Managing Company Accounts

Introduction

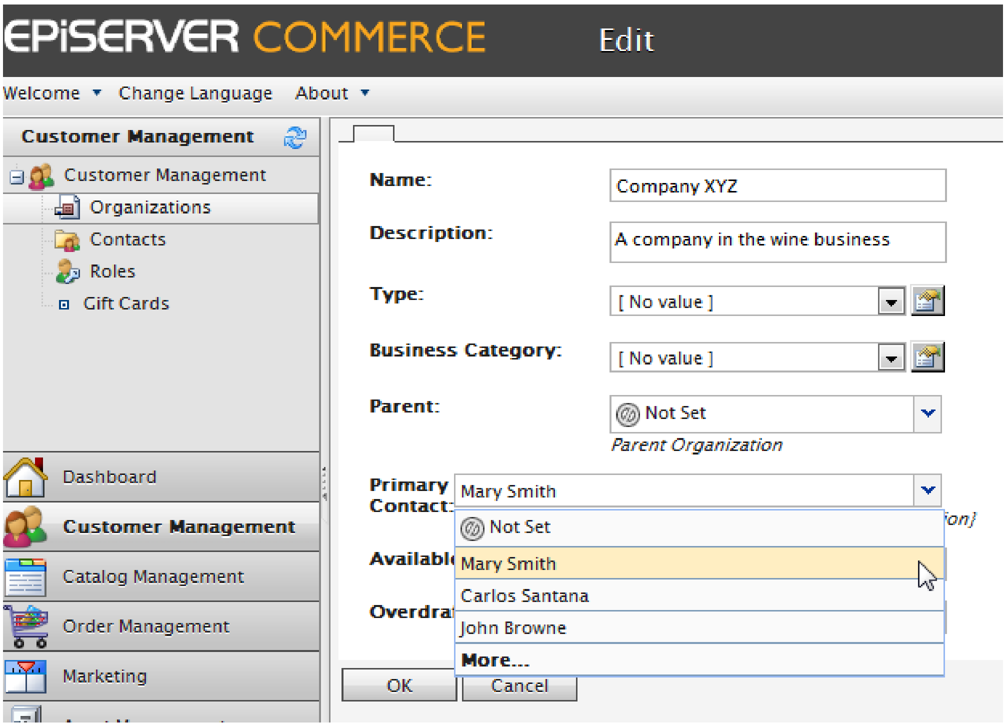
A **company account** is part of the B2B features on the EPiServer Commerce sample site, where businesses can manage their purchasing and deliveries from the e-commerce website. Companies can add their employees to the company account, and orders can be delivered to multiple addresses.

Adding a Company Account

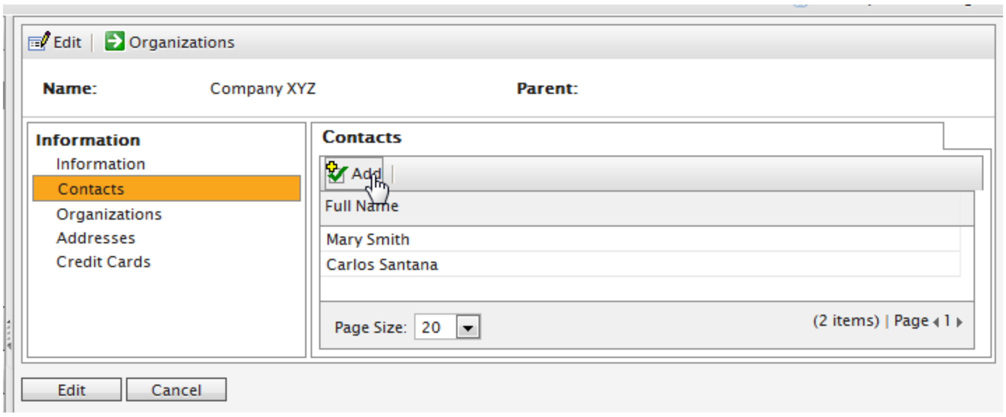
Do the following to add a company account:

1. In Commerce Manager, go to **Customer Management** and **Organizations**. Select **New Organization,** and add the company information.

2. Under **Primary Contact**, select the user that will be the **administrator** of the company account. The admininstrator must be registered on the website with an account.



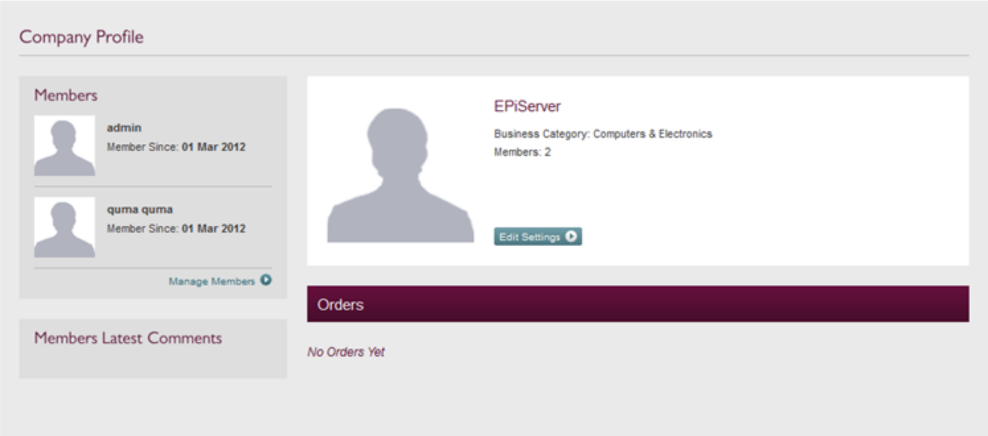
3. Under **Contacts** for the organization, select **Add** to add memebrs to the company account. You must at least add the **administrator** as a member of the account. Thisis needed to provide the account administrator access to the company account management features. Click **OK** to save the changes.



Administering Company Accounts

When the administrator goes to the **My Profile Page**, it will be a **Company Profile** page instead, from where the administrator can manage do the following tasks:

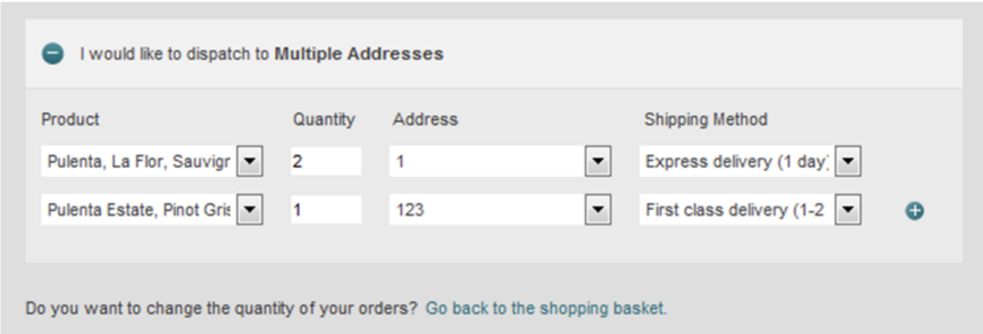
- **Edit the settings** of the company account.
- **Manage members** of the company (create/edit/delete).
- **View comments** posted by members of the company.
- **View orders** purchased by members of the company.



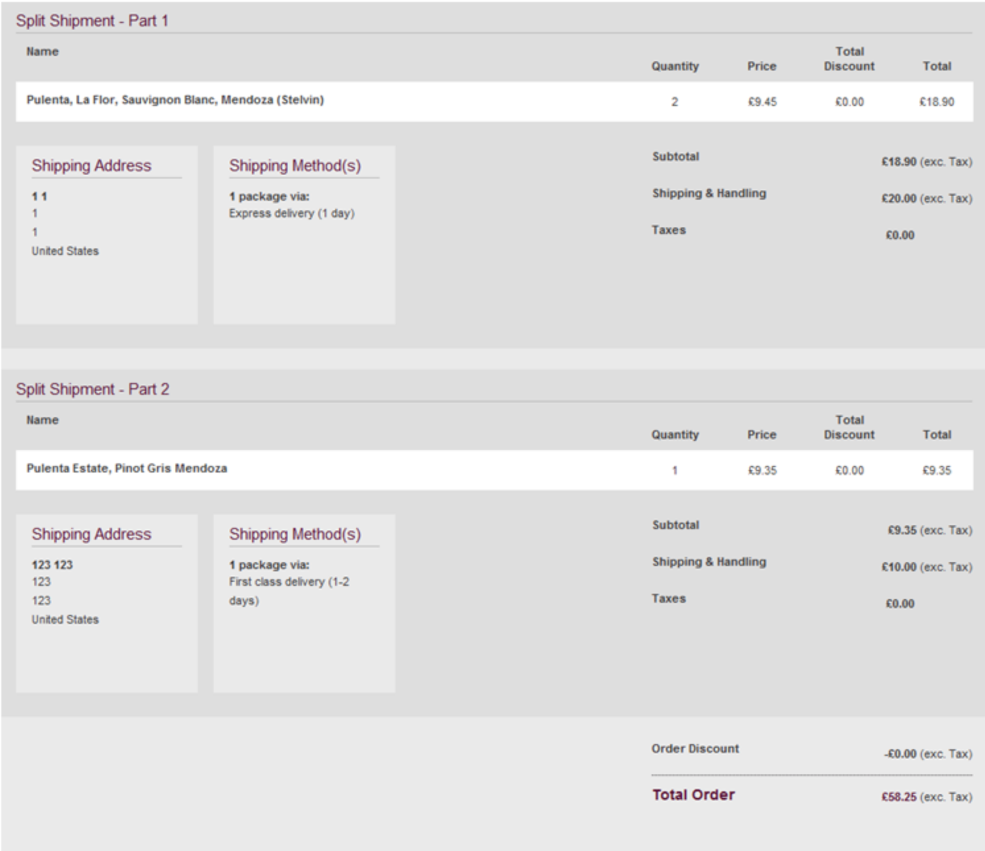
The **personal** My Profile page of the company account administrator can be accessed by typing in the URL in the address bar, for example: http://<domain>/en-US/My-Profile/My-Orders/

Delivering to Multiple Addresses

Multi-address delivery is a feature allowing for company users to dispatch deliveries to multiple addresses. The dispatch to multiple addresses option will be available for company account users during the checkout procedure. You can specify different quantities, delivery addresses and shipping methods for each delivery.



Each delivery can have its own shipping method but there will only be one billing address option.



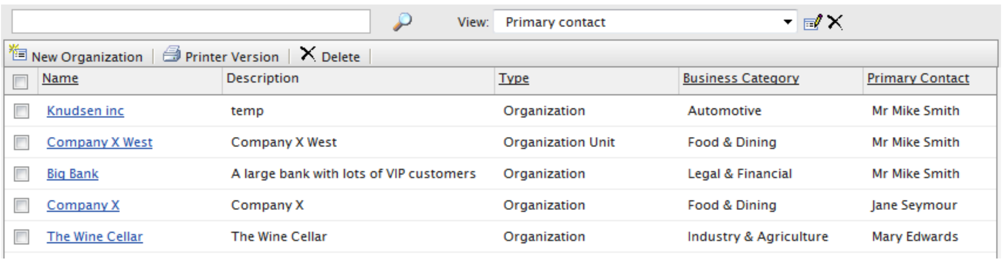
The functionality of the company account related page templates are described in more detail in the *Company Profile* section under **Page Templates**.

Editing and Deleting Organizations

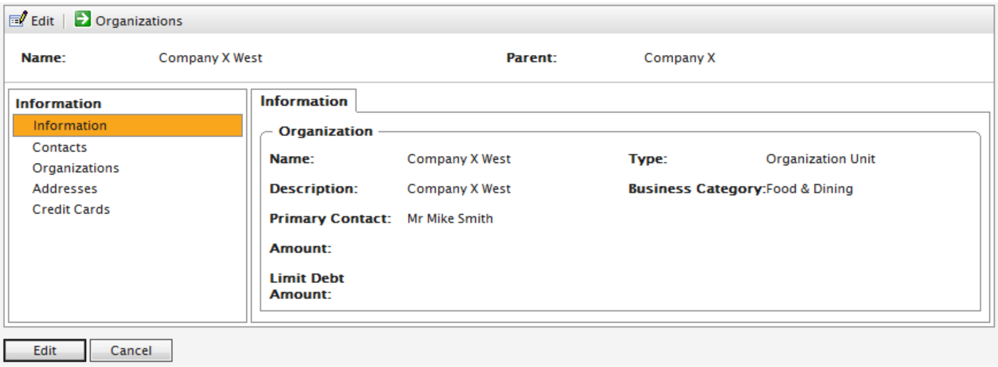
Editing Organizations

Do the following to **edit** an existing organization (parent) or organization unit (child):

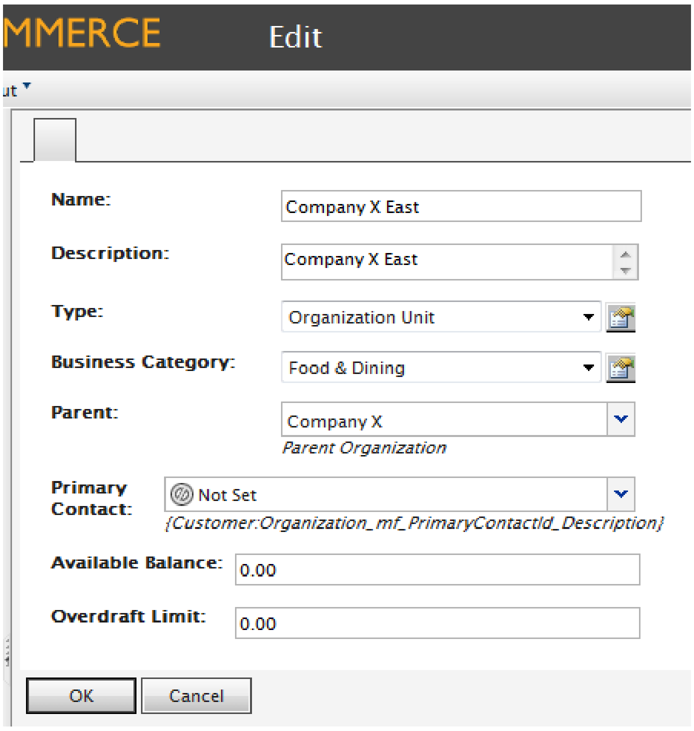
1. Go to **Customer Management** and **Organizations**. The **Organization List** page will be displayed.
2. Open an organization by clicking on it in the list.



3. Select any of the **Edit** options at the top or the bottom.



4. Edit the available information, see *Creating an Organization* for explanation of the fields.

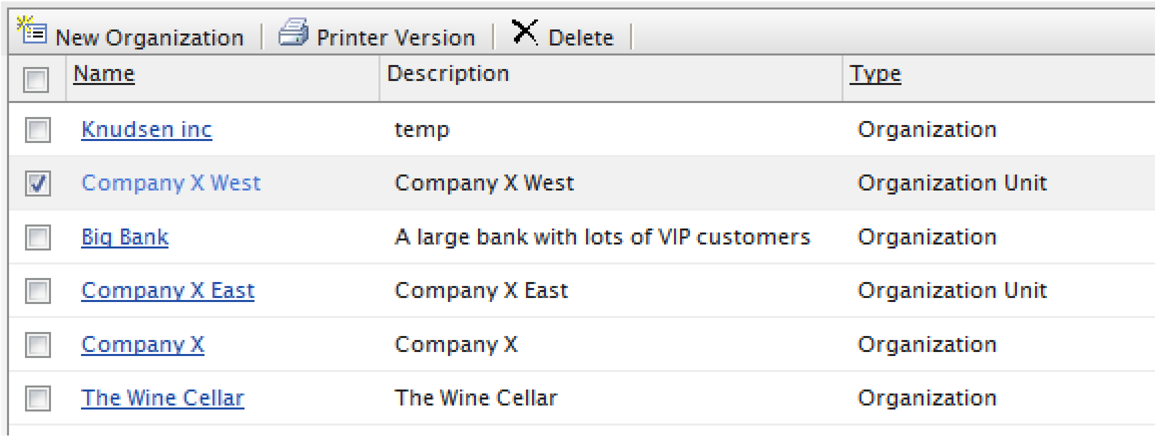


5. When you are done, click **OK** to save your changes.

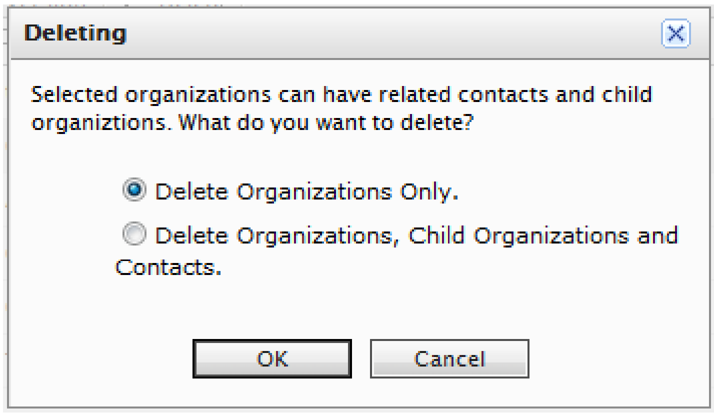
Deleting Organizations

Do the following to **delete** an existing organization (parent) or organization unit (child):

1. Go to **Customer Management** and **Organizations**. You will be brought to the **Organizations** page which lists any existing organizations.
2. In the list of organizations, select the checkbox next to the organization you want to delete and click **Delete**.



3. A confirmation message will be displayed. You can delete organizations with children without deleting the child organizations and contacts with no repercussions. This only leaves the contacts and child organizations as orphans that you can later reassign using the same methods described in *Creating an Organization*.



Select either **Delete Organizations Only** or **Delete Organizations, Child Organizations and Contacts** and click **OK** to complete the deletion.

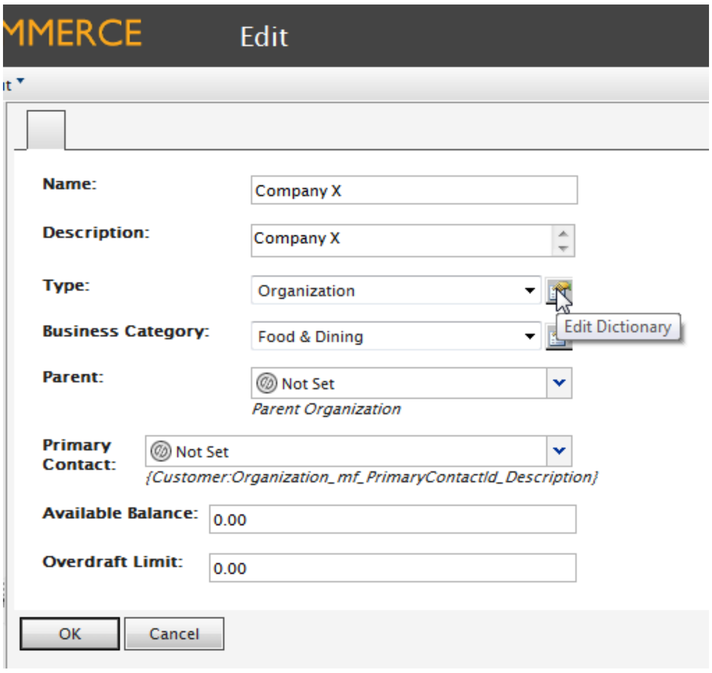
Defining Organization Types and Business Categories

Introduction

This section describes how to update dictionaries to create your own **organization type** definitions and **business categories** that can be applied when building an organization structure. By default, organizations can be of type "organization (parent)" or "organization unit" (child). A business category can be for instance an industry branch such as "Automotive" or "Food & Dining". This type of data is managed in so called **dictionaries**.

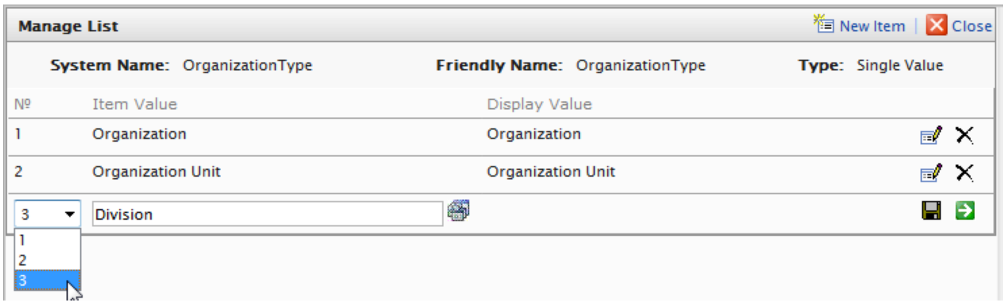
Creating, Editing and Deleting Organization Types

1. Open the **Organization Edit** page by creating a new organization or editing an existing one. Click on the **Edit Dictionary** icon next to the **Type** drop-down menu.



2. A dialog is displayed appears allowing you to **edit** the existing organization type dictionary by clicking the edit icon. To **add** a new item to the dictionary, click on **New Item**.

3. Select the order of the item from the drop-down on the left and enter a **name** for the item on the field next to the drop-down.



4. Click the **Save** icon to save the dictionary item. Click **Close** to close the dialog.
5. The dictionary item is now available for selection in the **Type** drop-down.

To **edit** an existing dictionary item, click the **Edit** icon next to the item. To **delete** a dictionary item, open the dictionary list and click the **Delete** icon next to the item.

If you change the number to a position higher in the list, the list will NOT be automatically reordered. You must therefore manually edit the entire list. However, having multiple copies of the same numerical value does not affect the system. Therefore, you can feel free to use the numbers as a ranking system, or you can devise your own internal method to numbering.

Creating, Editing and Deleting Business Categories

Out of the box, there is a list of categories you can assign to an organization. You can add more categories the same way you add organization types.

1. Click on the **Edit Dictionary** icon next to the **Business Category** drop-down menu.
2. A dialog is displayed appears allowing you to **edit** the existing business categories by clicking the edit icon. To **add** a new item to the dictionary, click on **New Item. To delete** an item in the list, click the **Delete** icon next to the item.
3. Select the order of the item from the drop-down on the left and enter a **name** for the item on the field next to the drop-down.
4. Click the **Save** icon to save the dictionary item.
5. The new business category is now available for selection in the **Business Category** drop-down menu.

To **edit** an existing dictionary item, click the **Edit** icon next to the item. To **delete** a dictionary item, open the dictionary list and click the **Delete** icon next to the item.

Contacts

Introduction

Contacts and their related **accounts** are created automatically when users create them on the front-end, for example if they register to make a purchase, or you can create them from the back-end.

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 that are users who will be accessing Commerce Manager, can be assigned roles based on varying permissions. Refer to *Roles and Permissions* for more information.

Working With Contacts

The work with contacts and accounts includes the following tasks:

- *Creating contacts and related accounts*
- *Browsing and viewing existing contacts*
- *Editing and deleting existing contacts and related accounts*
- *Defining dictionary values for customer (contact) groups*

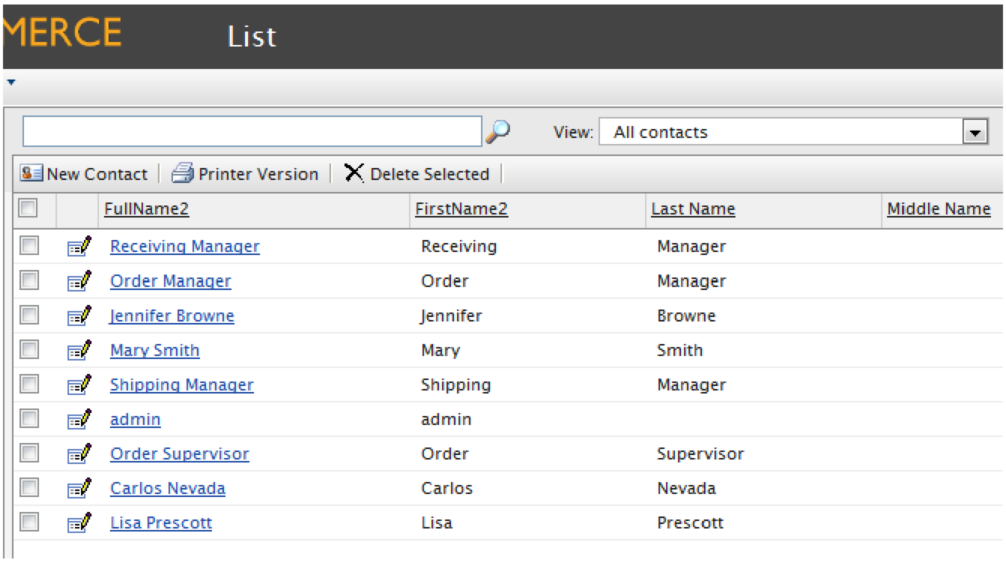
Browsing and Viewing Contacts

Browsing Contacts

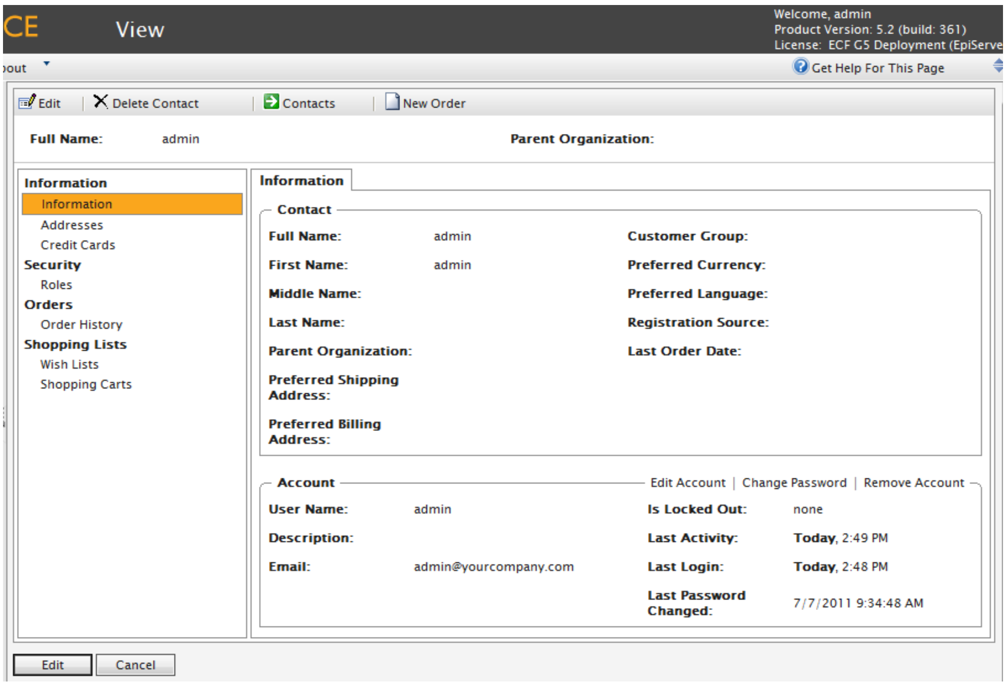
To browse Contacts, go to **Customer Management > Contacts**.

Viewing Detailed Contact Information

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



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

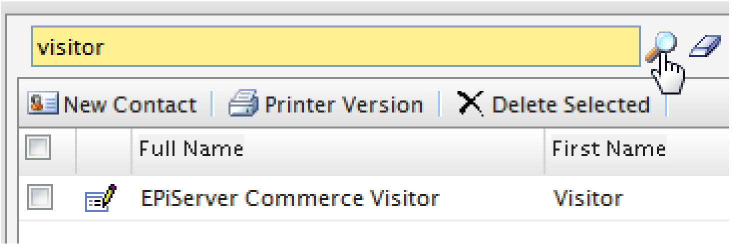


From within the **Contact Info** form, you can view other recorded information about the Contact. For example, you can view **Addresses** and **Order History** related to this Contact.

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.



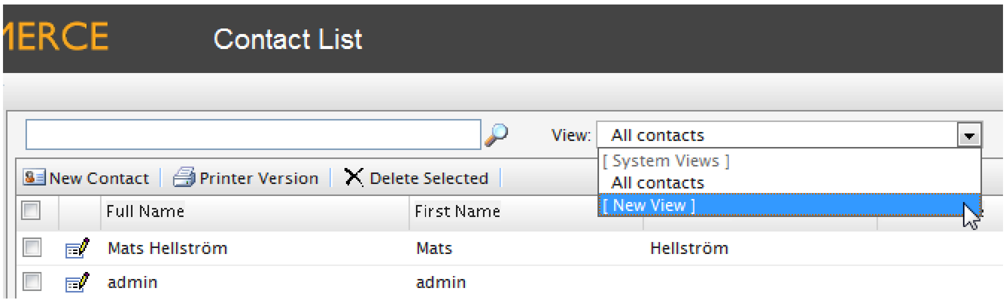
To clear the search and revert back to show all Contacts, click on the **Reset** icon (eraser) next to the Search icon.

Customizing Views for Browsing Contacts

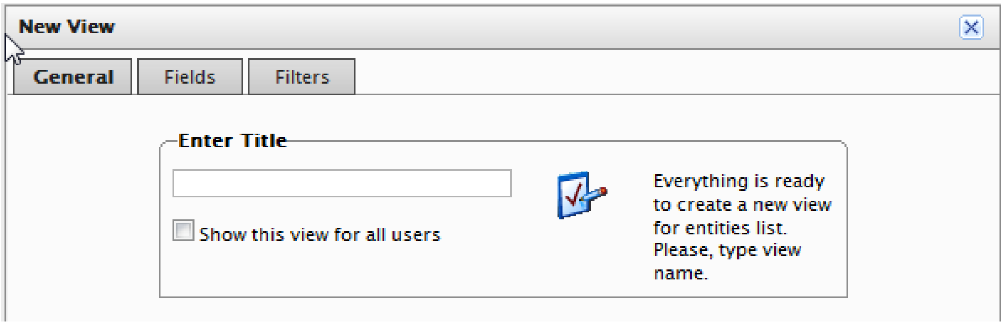
LIke Organizations, users can create or customize **Views** when browsing objects.

Creating a New View

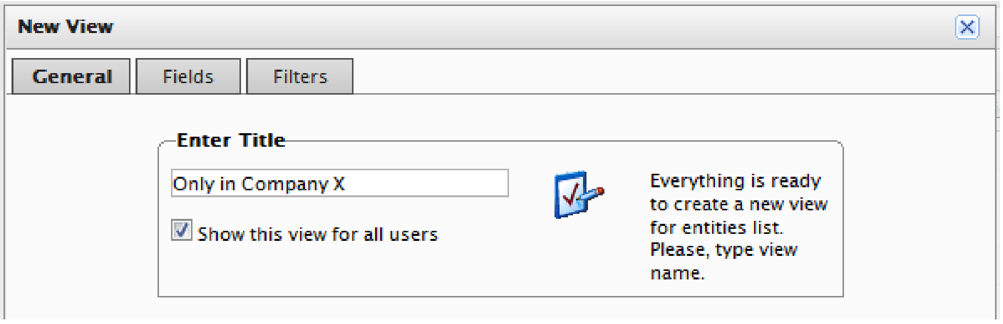
On the **Contact List** page, click on the **View** drop-down menu and select **New View**.



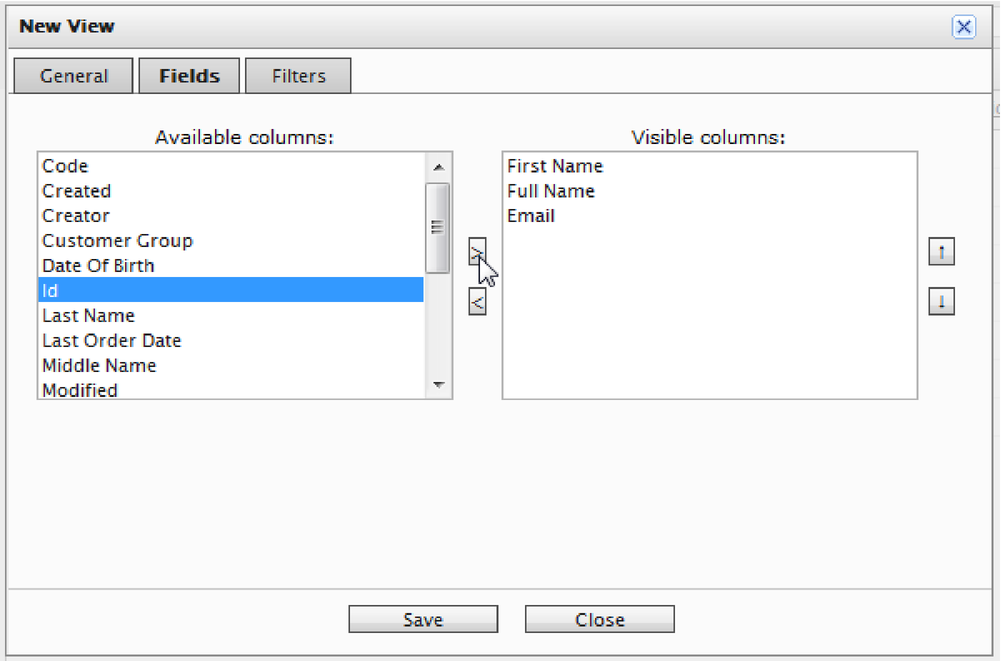
A pop-up appears, very similar to the one found in *Organizations*. This form gives users the ability to customize which columns appear and apply a variety of filters.



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.



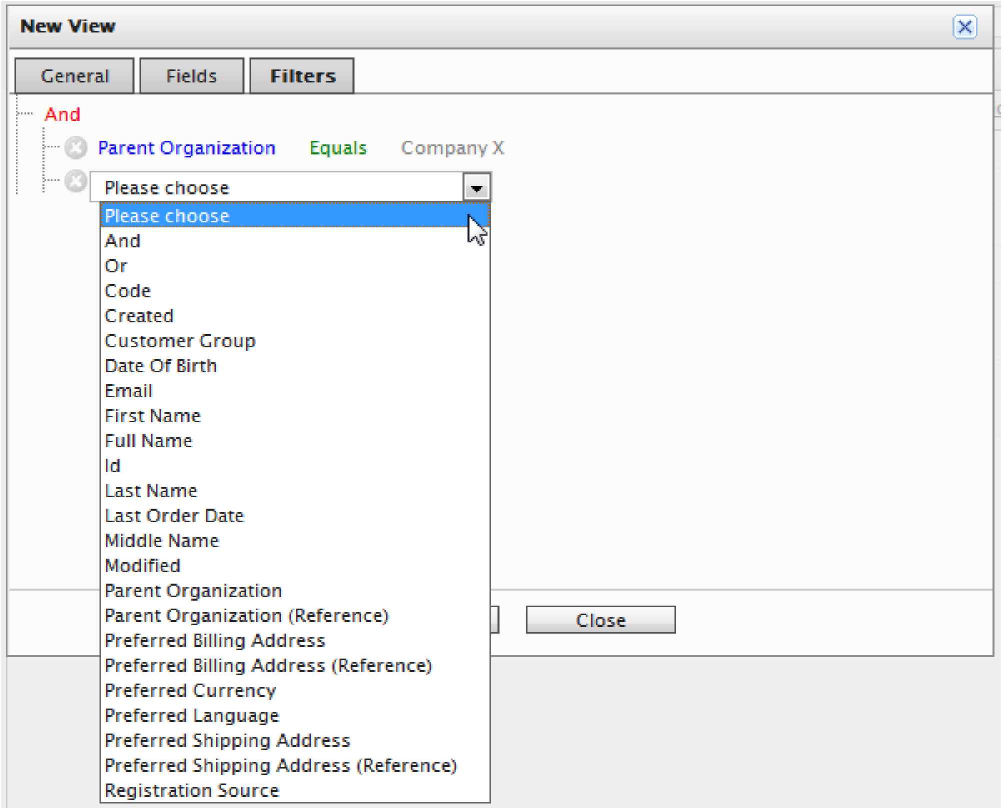
Click on the **Fields** tab to select which columns you want to appear in the custom View. Select the columns you want to have appear by clicking and highlighting the column name and moving it over to the **Visible columns** list by clicking on the **Right Arrow** icon.



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.

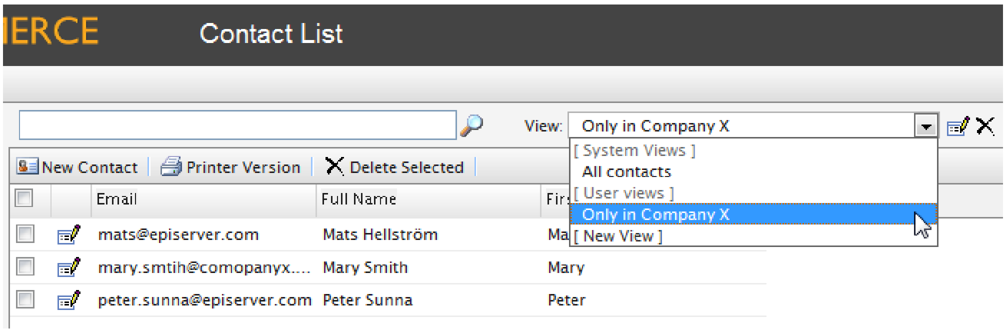
Click on the **Filters** tab to set the view filters. Users are given precise controls over filters for setting up rules for their custom View. Clicking on the **+** icon allows you add an additional filter.



There are a multitude of options available for customization.

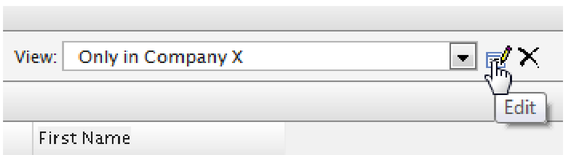
Applying and Editing a View

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



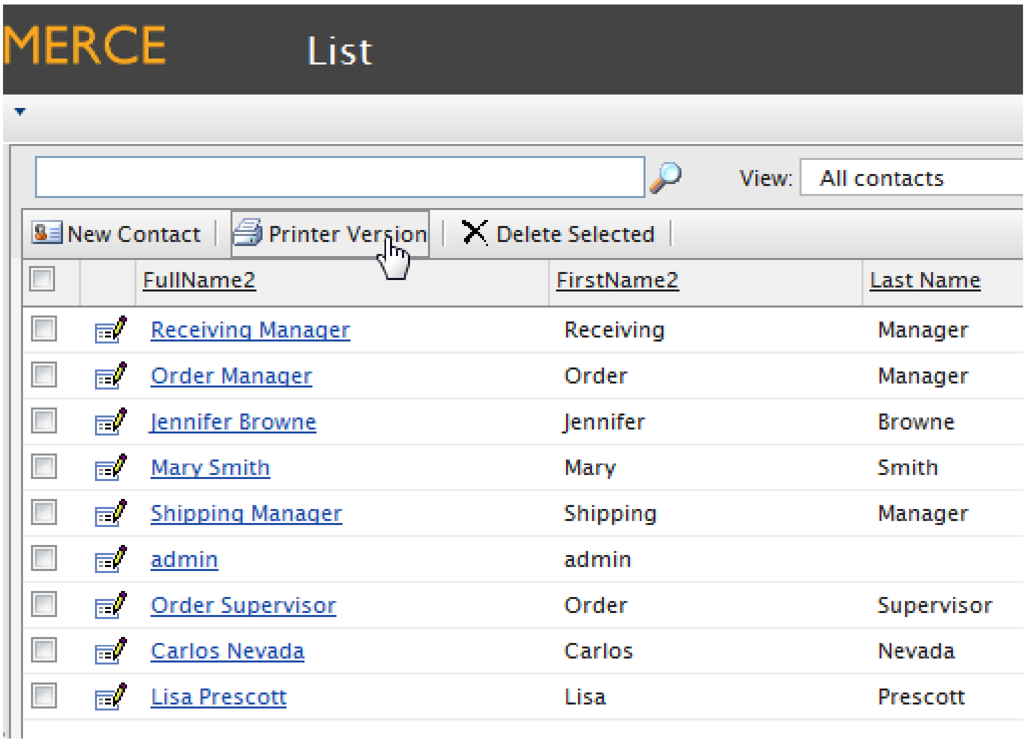
To apply the **View**, select it from the drop-down. Based on the columns and filters you applied for the custom View, your **Contact List** will reflect those options.

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.

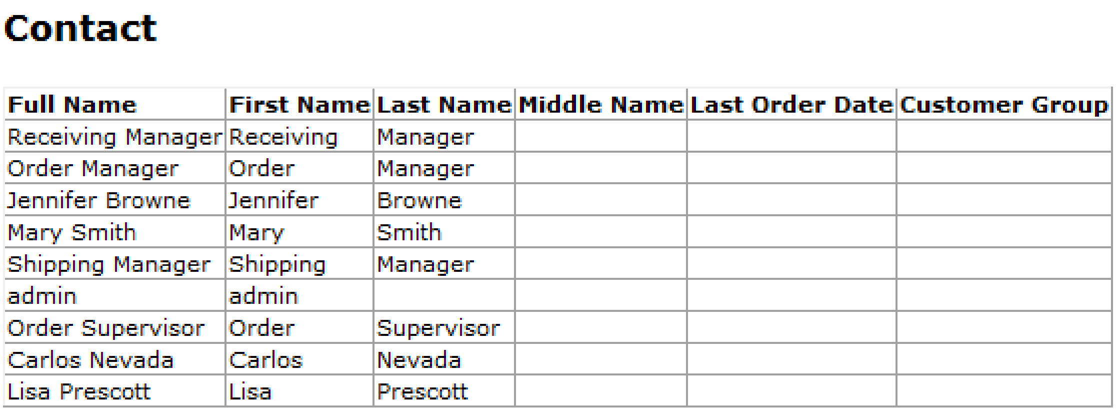


Printing a List of Contacts

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.



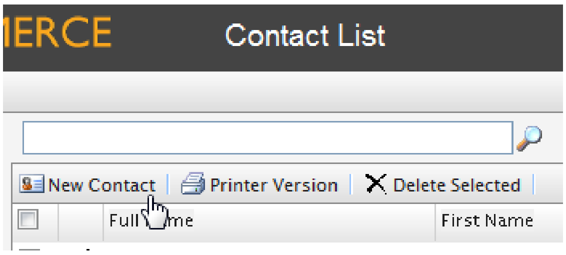
Contact

Full Name	First Name	Last Name	Middle Name	Last Order Date	Customer Group
Receiving Manager	Receiving	Manager			
Order Manager	Order	Manager			
Jennifer Browne	Jennifer	Browne			
Mary Smith	Mary	Smith			
Shipping Manager	Shipping	Manager			
admin	admin				
Order Supervisor	Order	Supervisor			
Carlos Nevada	Carlos	Nevada			
Lisa Prescott	Lisa	Prescott			

Creating Contacts and Accounts

Creating Contacts

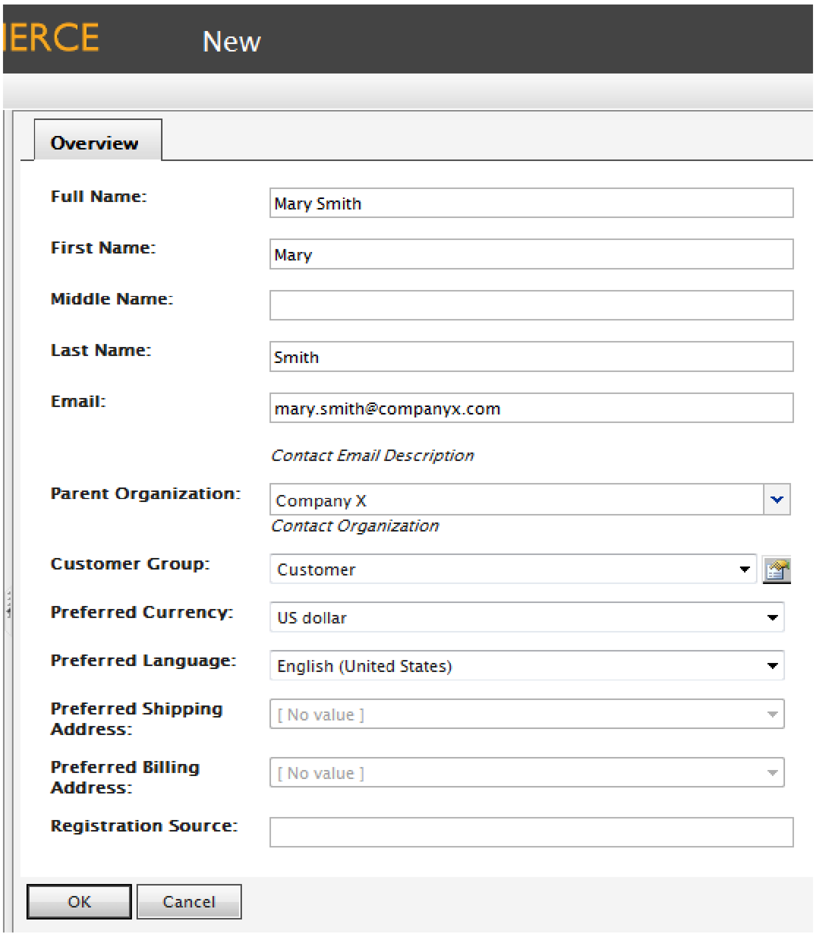
To create a new **Contact**, from the **Contact List** page, click on **New Contact**.



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.

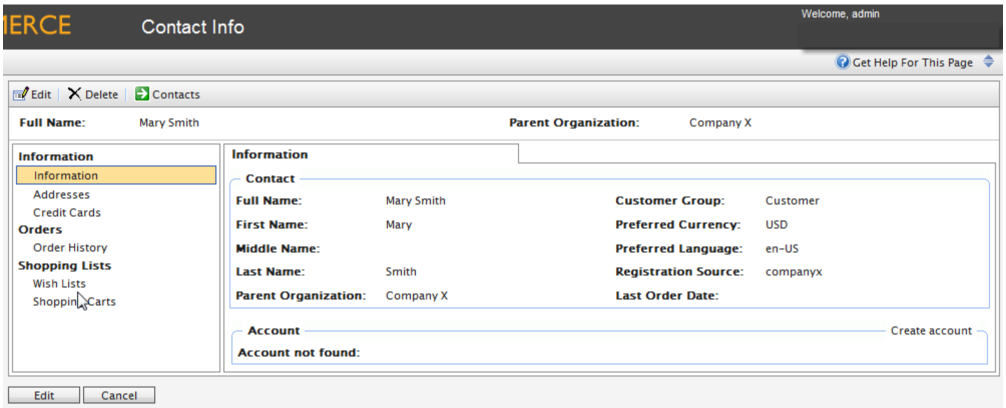
1. Select a **Parent Organization** from the drop-down menu to associate the contact with a single parent organization.
2. Assign the contact to a **Customer Group**. More Customer Groups can be added by editing the *Customer Group Dictionaries*. Customer Groups become useful when setting specific permissions and targeted *Marketing Campaigns*. (For more information, see "How to Assign a Customer Group Sales Price for a Particular Item" section below.)
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. **Preferred Shipping** and **Billing addresses** are related to company accounts, refer to *Manage Company Accounts* for more information.
6. 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.



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



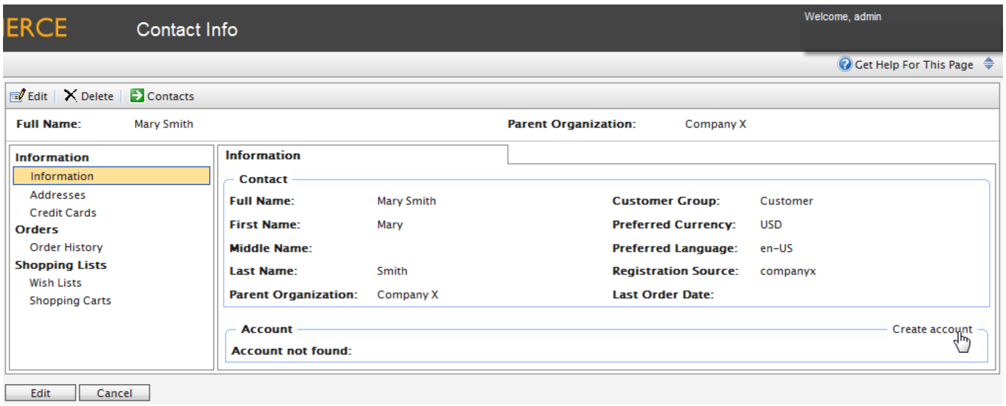
To go back to the Contact List, click **Cancel** or the **Contacts** button next to the **Right Arrow** icon.

Creating Accounts

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**.

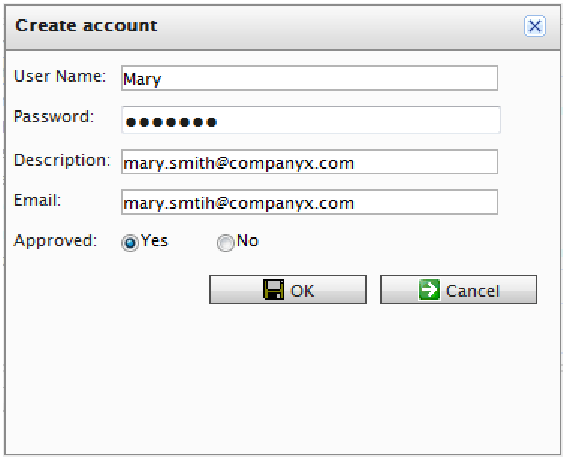


A pop-up appears to enter in their user account credentials. A **User Name** and **Password** are required to create the account.

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.

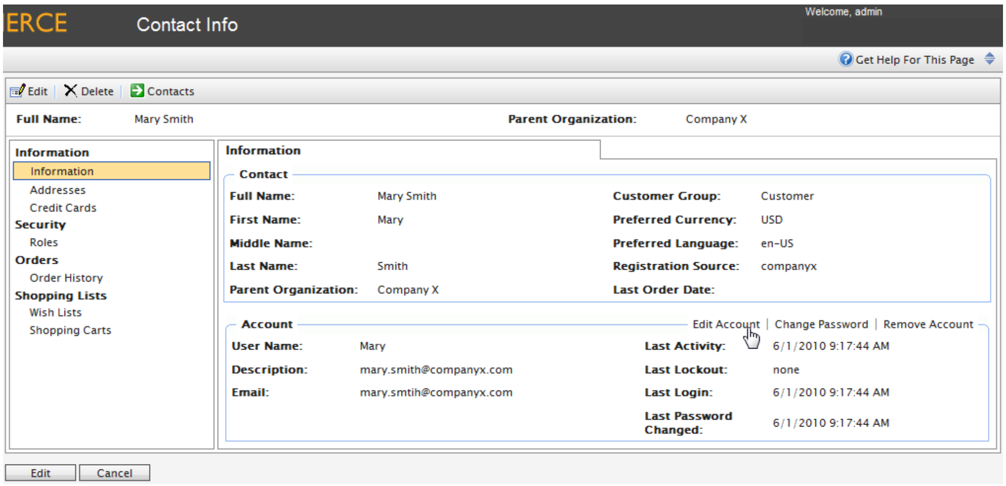
5. Click **OK** to save the account.



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.



Editing and Deleting Contacts and Accounts

Editing Contacts and Accounts

To edit a **Contact**, select the contact in the contact list and click **Edit**. Edit the information and click **OK** when done.

To edit an **Account**, select the related contact in the contact list and select the **Edit Account** option in the lower part of the dialog. Edit the information and click **OK** when done.

You cannot change the **User Name** unless you remove the account and recreate the same account again.

Deleting Contacts and Accounts

To delete a **contact**, select the contact in the list of contacts, select the checkbox next to the contact you want to delete and click **Delete**. Click **OK** to confirm the deletion.

To delete an **account**, select the related contact in the contact list and click the **Remove Account** option in the lower part of the dialog.

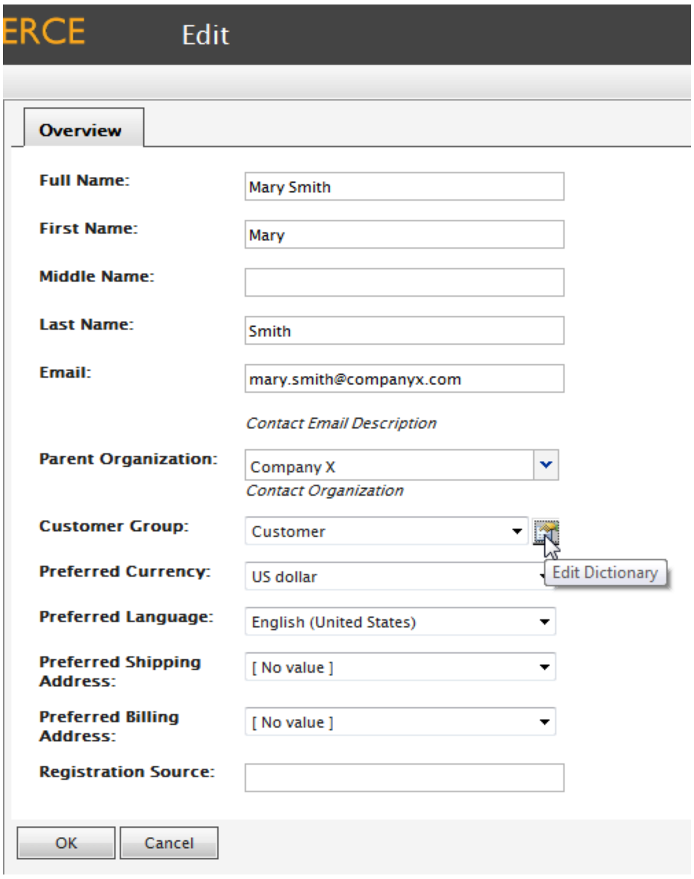
Defining Customer Groups

Introduction

This section describes how to update dictionaries to create your own **customer (contact) groups** that can be applied when adding contacts to your organization. By default, customer groups can be of type "customer", "partner" or "distributor". This type of data is managed in so called **dictionaries**.

Creating, Editing and Deleting Customer Groups

1. Open the **Contacts Edit** page by creating a new contact or editing an existing one. Click on the **Edit Dictionary** icon next to the **Customer Group** drop-down menu.



2. A dialog is displayed appears allowing you to **edit** the existing customer group dictionary by clicking the edit icon. To **add** a new item to the dictionary, click on **New Item**.

3. Select the order of the item from the drop-down on the left and enter a **name** for the item on the field next to the drop-down.

4. Click the **Save** icon to save the dictionary item. Click **Close** to close the dialog.
5. The dictionary item is now available for selection in the **Customer Group** drop-down.

To **edit** an existing dictionary item, click the **Edit** icon next to the item. To **delete** a dictionary item, open the dictionary list and click the **Delete** icon next to the item.

If you change the number to a position higher in the list, the list will NOT be automatically reordered. You must therefore manually edit the entire list. However, having multiple copies of the same numerical value does not affect the system. Therefore, you can feel free to use the numbers as a ranking system, or you can devise your own internal method to numbering.

Roles

Introduction

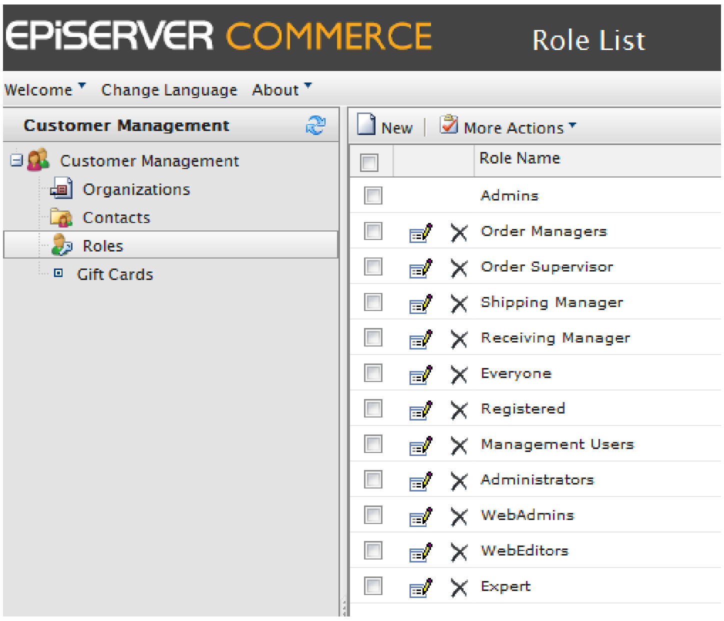
Roles are used for managing **permissions** for different groups of users. Out-of-the-box, EPiServer Commerce includes a list of predefined roles that can be assigned to user accounts.

- **Order Managers** - allows users to manage (View/Create/Edit/Delete/Others) elements within the Order Management system.
- **Order Supervisor** - allows users to fully administer the Order Management system.
- **Shipping Manager** - has the ability to view, pack, and complete shipments.
- **Receiving Manager** - has the ability to view shipments and receive returns.
- **Everyone** - one of the default roles which is assigned when a customer registers an account from the front-end public site.
- **Registered** - one of the default roles which is assigned when you register from an account from the front-end public site.
- **Management Users** - allows users access to Commerce Manager.
- **Administrators** - allows users to fully administer most areas of Commerce Manager.
- **WebEditors** - allows users to access the edit interface for working with website content.
- **WebAdmins** - allows users to access the admin interface for administering the website.
- **Expert** - on the EPiServer Commerce sample site, you can **assign experts** to be involved in rating and reviewing of products. Refer to the *Social Features* section for more information.

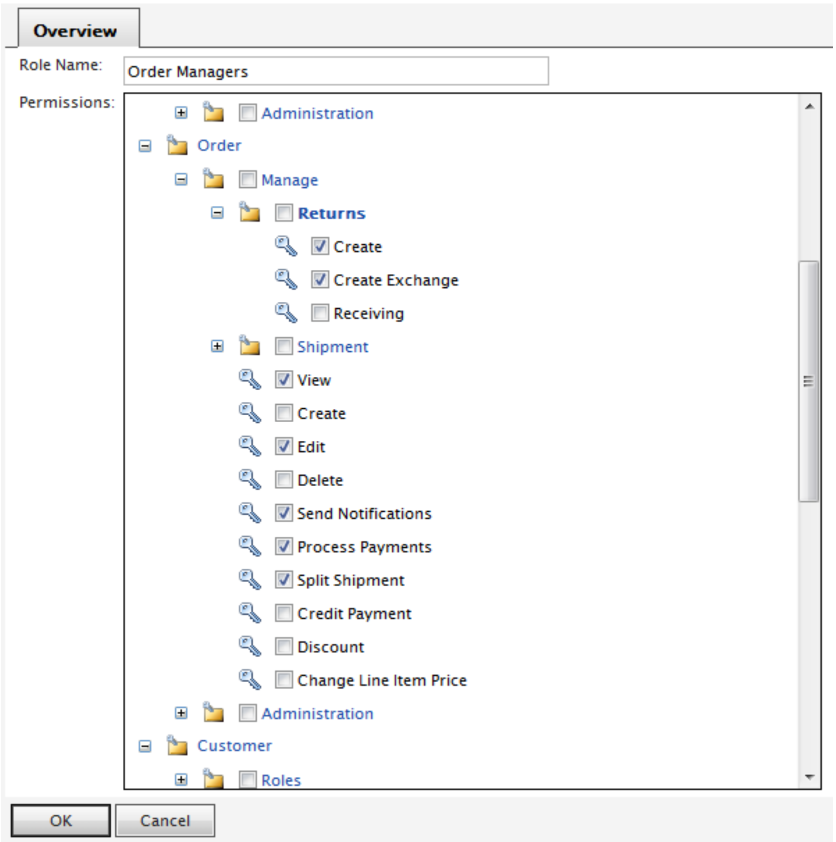
Users can also create their own roles based on a set of permissions. Roles allow administrators to restrict users from accessing different systems or folders depending on their needs. There is a wealth of permissions options administrators can set for a role, and each role area has specific areas that may not be applicable to other areas. Generally, permissions such as **View** and **Edit** are commonplace.

Exploring Roles and Permissions

When you first select **Roles**, you will see a list of the roles that are currently available in the system.

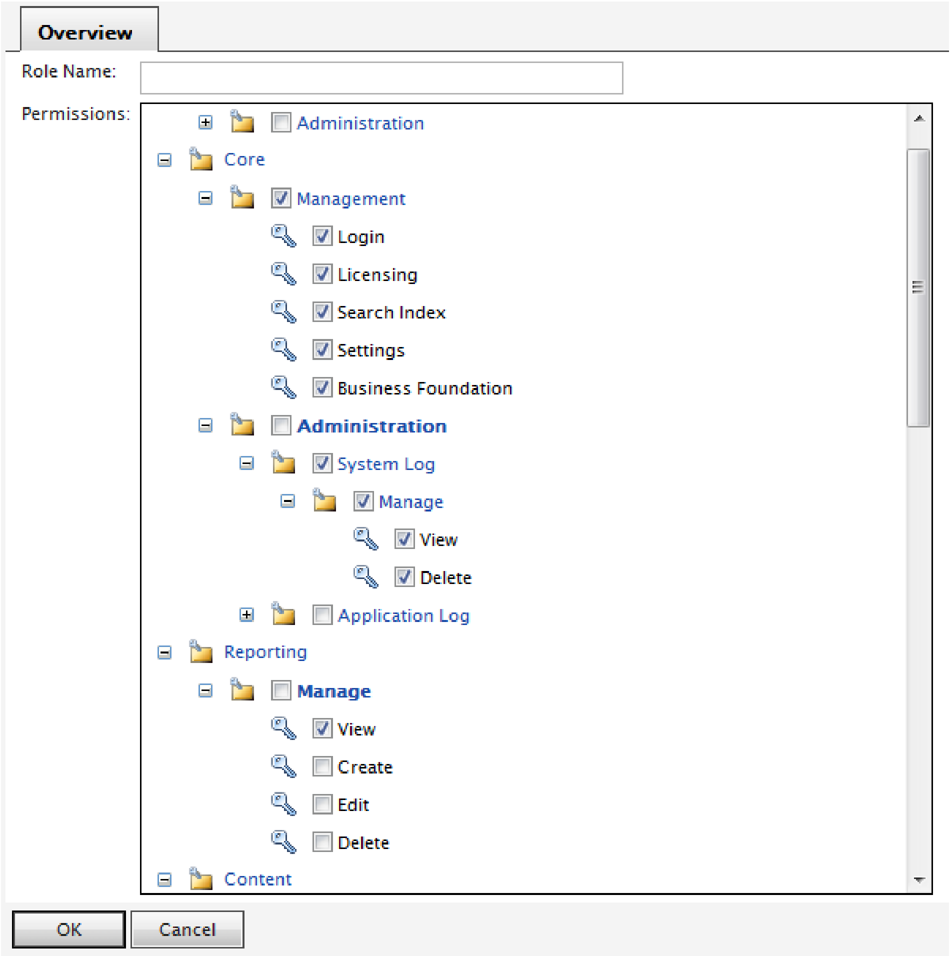


Each role has a series of defined **permissions** that can be set on a very detailed level. For instance, the **Order Managers** role can create returns and exchanges, and view. edit, send notifications, process payments and split shipments for orders.



For a role to be able to successfully view Commerce Manager, it must have the following attribute. Go to **Core > Management > Login** and check the **Login** button. Without this checked, the user with that role will be unable to login into Commerce Manager unless that user has another role that includes that ability since all roles are **cumulative** in their effect.

Definitions of roles can be even more in-depth. A role can have certain detailed permissions in parts of the system, but not full control. In the example below, this role has full control over the **Management** part of the **Core** system, but only partial control over the **Administration** system.



Notice how the tree system works. Clicking on the system above it gives full control of all the branches beneath it, but clicking farther down the tree only gives access to those systems.

Working With Roles

The work with roles and permissions includes the following tasks:

- *Creating, editing and deleting roles*
- *Assigning roles to individual accounts*

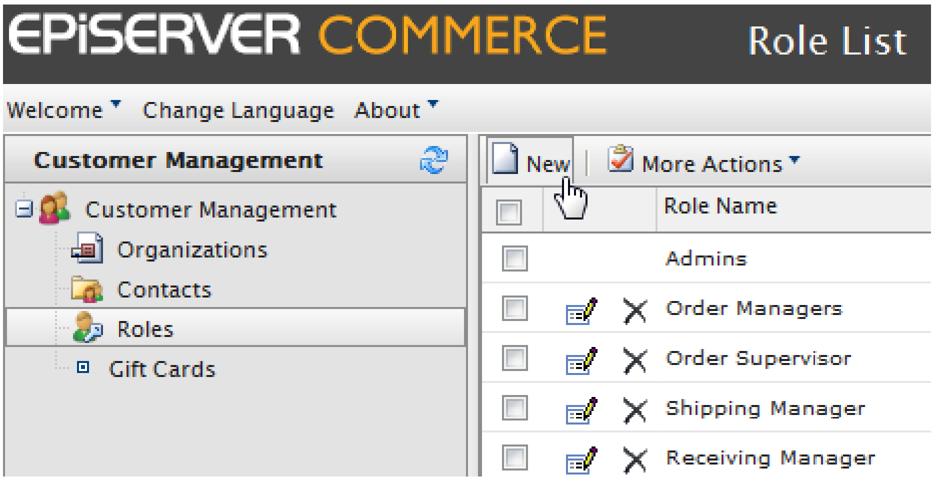
Creating, Editing, and Deleting Roles

Introduction

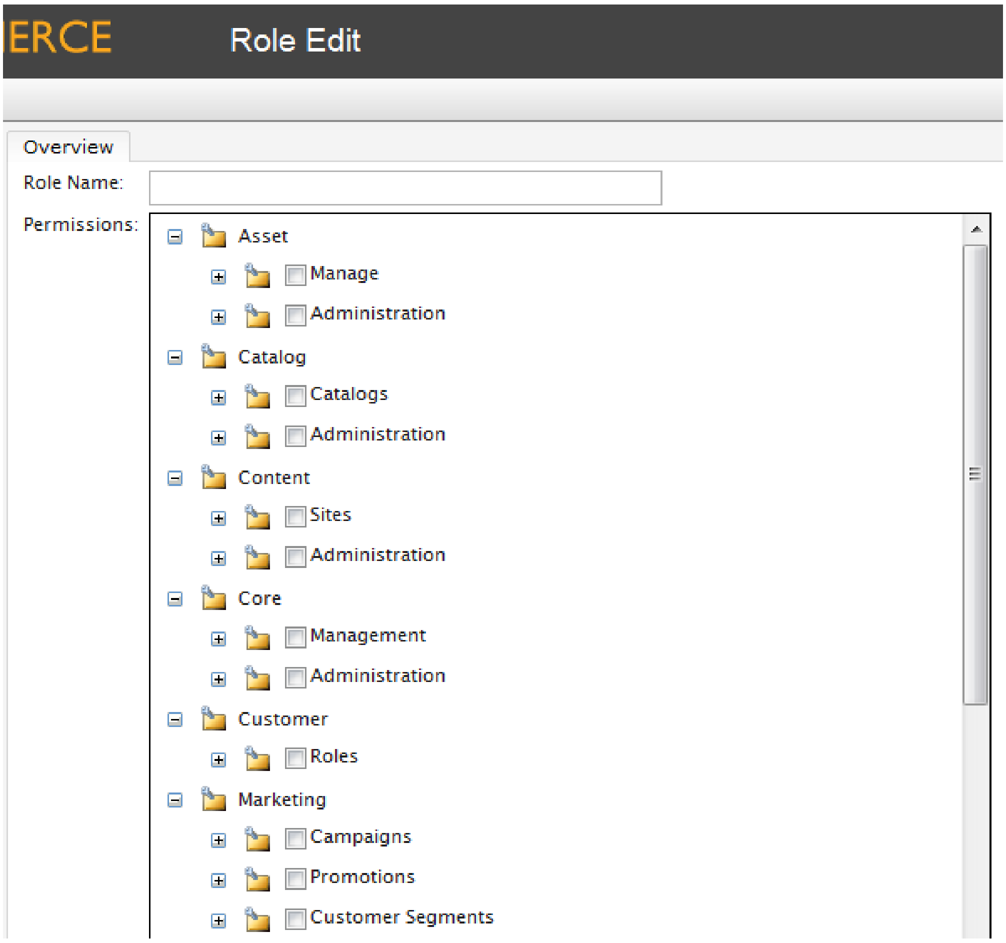
Out of the box, Commerce Manager includes a list of pre-existing **Roles** that can be assigned to Accounts. Users can also create their own Roles based on a set of Permissions. Roles allow Administrators to restrict users from accessing different systems or folders depending on their needs.

Creating a Role

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



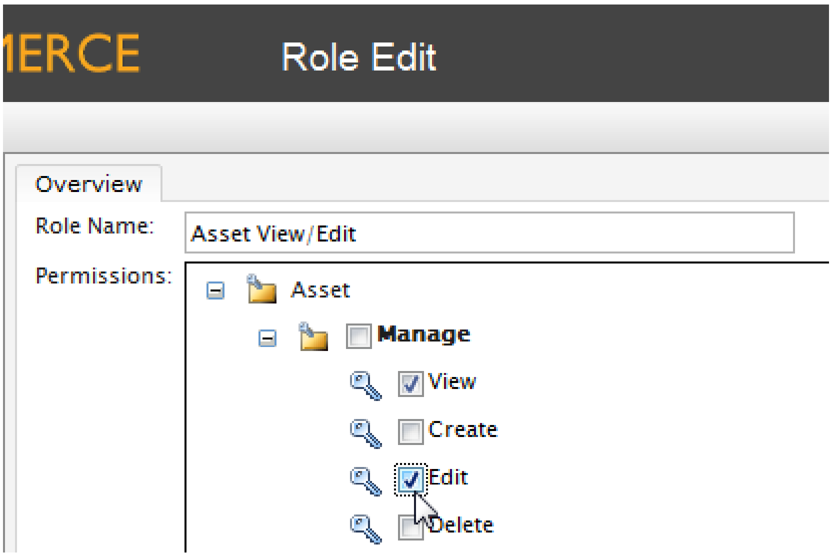
Click on **New** to open up the **Role Edit** page.



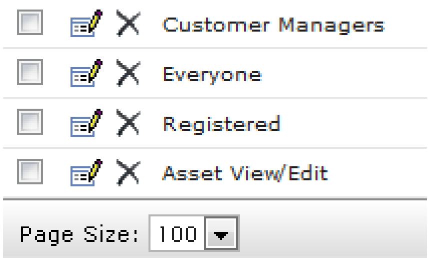
There is a wealth of Permissions options Administrators can set for a Role.

Enter 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**.



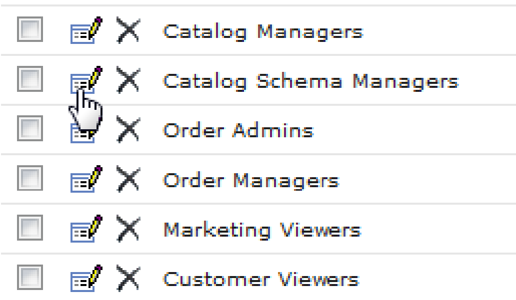
Once done defining the Role, click on **OK**. The new Role will appear on the **Role List**.



Editing Existing Roles

All existing Roles, including the ones included out of the box with Commerce Manager, can 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.

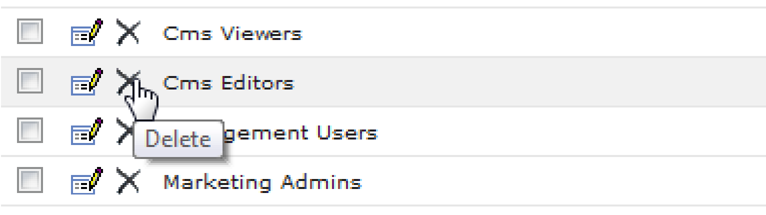


The **Role Edit** page appears. You can customize the Permissions settings for the Role. Once done, click **OK**.

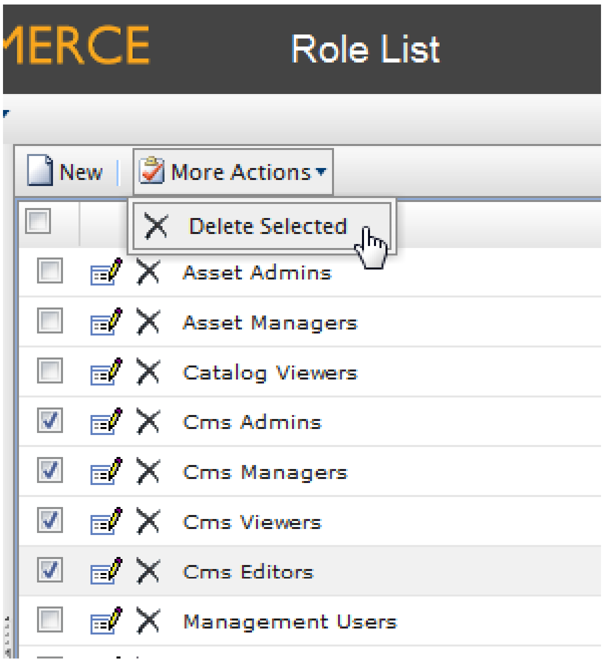
Deleting Roles

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.



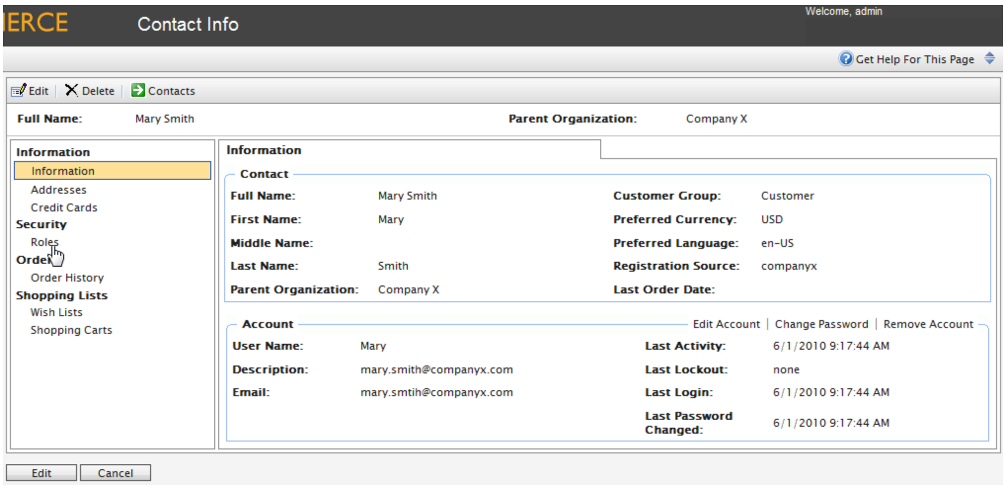
Assigning Roles to Individual Accounts

Introduction

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.

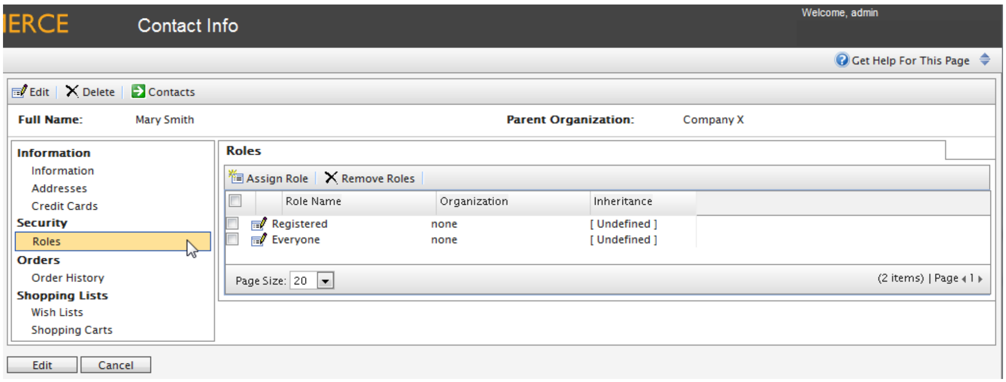
Assigning a Role

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

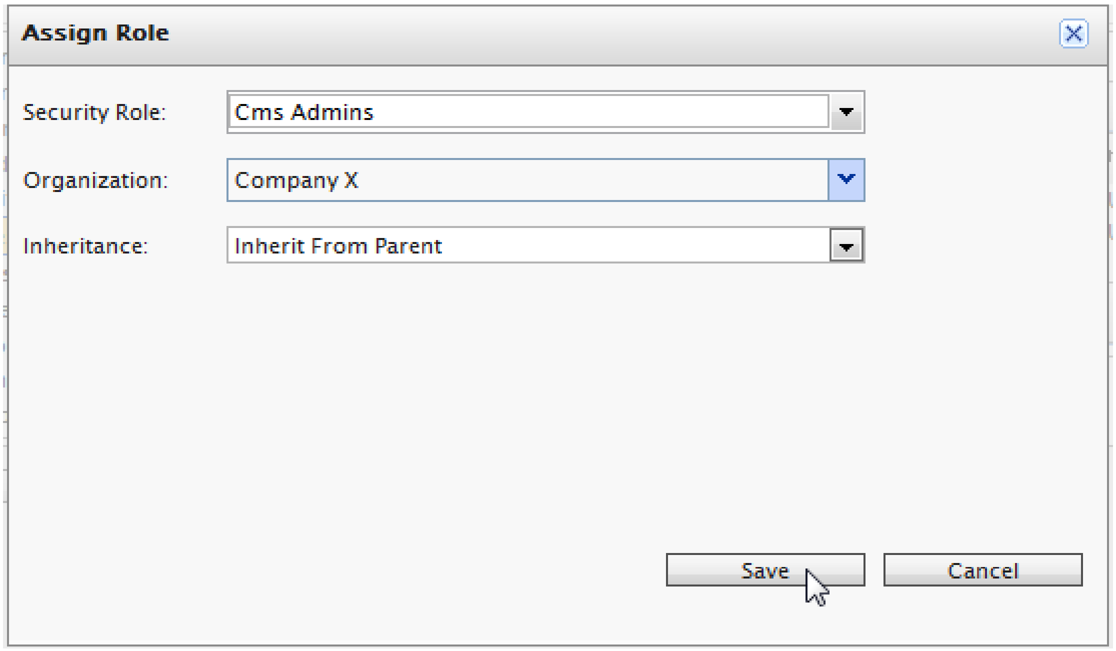


Under **Security**, click on **Roles**. The **Security** section only appears after an Account was created for the Contact.

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



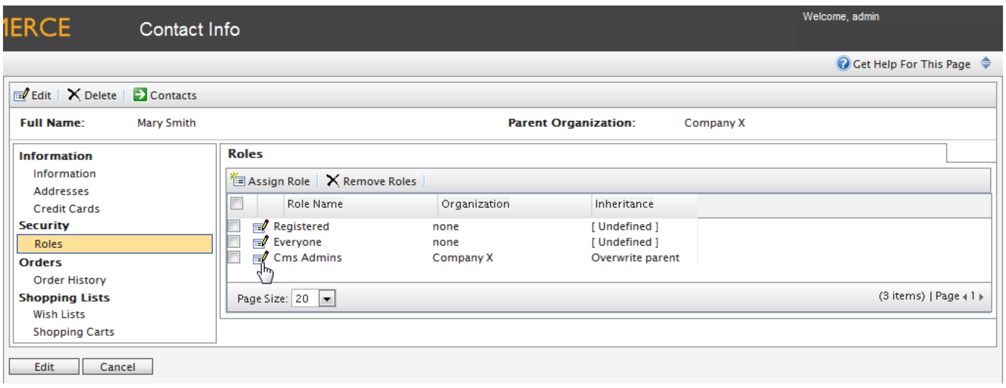
Click on **Assign Role** to assign a new Role to the Account. A pop-up appears allowing you to assign a specific Role from the drop-down menu.



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.



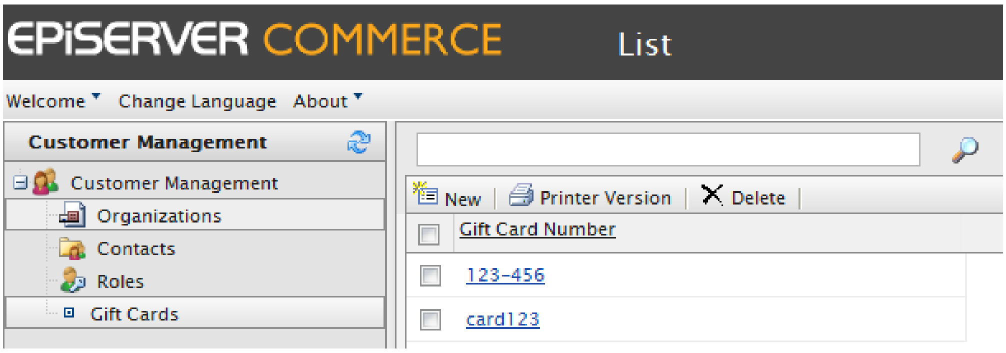
Gift Card Administration

Introduction

The EPiServer Commerce sample site has functionality for creating gift cards that are used during the checkout procedure. You can create gift cards for different amounts and define the validity period for the card. A gift card payment can be combined with other payment methods.

The sample site has a page template which enables the customer to enter gift card information to be used during purchasing. The gift card sample page template is described in more detail under the *Gift Card section under Payment Methods*.

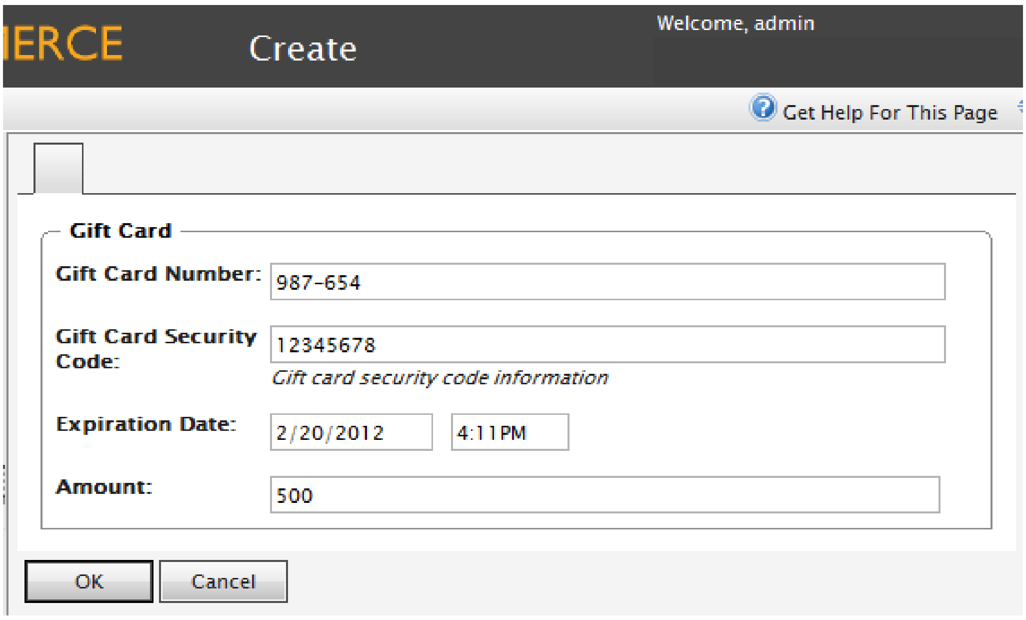
Gift cards are administered from the **Customer Management** sub-system.



Creating a Gift Card

Do the following to **create** a new gift card:

1. Under **Customer Management**, select **Gift Cards** and then the **New** menu option.
2. Enter the **Gift Card Number**.
3. Enter the **Gift Card Security Code**.
4. In the **Expiration Date** field, enter the end date for the validity of the gift card.
5. Enter the value for the gift card in the **Amount** field.
6. Click **OK** to save the gift card.



Editing a Gift Card

Do the following to **edit** an existing gift card:

1. Click on the link for the desired gift card in the gift card list.
2. Click the **Edit** button, or select the **Edit** menu option.
3. Update the gift card information and click **OK** to save the changes.
4. Click **Back to list** to return to the list view.

Deleting a Gift Card

Do the following to **delete** an existing gift card:

1. In the gift card list view, select the gift card(s) to be deleted by checking the select box in front.
2. Click the **Delete** menu option, and click **OK** to confirm the deletion.

Catalog Management

Introduction

The **Catalog Management** system provides full complement of tools and capabilities to create and manage a diverse range of products, variations, pricing strategies, languages, and related website functions.

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.

EPiServer Commerce allows you to easily and flexibly organize and categorize your products. All products referenced on a front-end site reside in a catalog created in Commerce Manager. 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.

Organizing Catalogs and Catalog Entries

A **catalog** is a top-level container for all types of catalog entries such as:

- ***Categories*** - a grouping of purchasable products.
- *Products* - represents various forms of merchandise that you can display and purchase from the front-end site. Products can be organized into the following:
- *Variations/SKUs*
  A **variation** or **SKU** (Store Keeping Unit) 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. All pricing is SKU specific and separate, unlike for a package which is multiple SKUs put together in a single unified price.
  Refer to "Mixed Cases" on the EPiServer Commerce sample site, for an example of a product bundle.

- ***Packages***
  A **package** is comparable to an individual SKU because the package item must be purchased as a whole (for instance computer system). Multiple SKUs make up the package, but it has its own single unique pricing and SKU.
- *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 outselling/cross-selling item. Associations can be made from any of the individual products.

Meta Classes and Fields for Products

You can define your own **meta classes and meta fields** for both **products** and **orders** in Commerce Manager. For instance, if you create a meta class called "Wine" you will want to add meta fields that are characteristic for wine, for instance "color", "taste", "vintage" and "maturity".

When meta fields and classes have been created, they will be available for usage when working with the product catalog. Meta classes and fields for catalogs are defined in the **Catalog System** part of **System Administration**. For more information, refer to *Setting up Meta Classes and Fields*.

Working With Catalog Management

The Catalog Management system provides a full complement of tools and capabilities for managing common catalog tasks such as:

- *Importing and exporting* product catalogs between websites.
- *Create multiple independent catalogs* which can be associated to one or more sites.
- *Categorization* and organization of catalog entries.
- Merchandise products through the creation of *bundles*, *packages*, and *dynamic packages*.
- *Managing catalog and product availability*, structuring, pricing, and taxation.
- *Reviewing and editing catalogs* before launching live on your site.

We recommend that you start with the catalog that came with the EPiServer Commerce sample site, which contains the **Wine** sample catalog. You can also use the export/import functionality to get catalogs into a different environment. Also, you are given the flexibility to use a .csv file to rapidly create a new catalog from scratch

Importing and Exporting Catalogs

Managing product catalogs is a central feature in e-commerce, and getting the products into the system is a primary task when setting up a site the first time. The scenario could also be that you want to move or copy existing product catalogs between sites. *Creating catalogs and adding catalog entries manually* can be done but is most often not an option when dealing with large product catalogs.

Existing product catalogs can be exported and imported into EPiServer Commerce as a **.zip file**, using *the standard export/import feature* . You can also manage the product catalog in bulk using the *CVS catalog import feature*. Here you use an Excel sheet and save the file in the **.csv file**. Before the export/import, the various types of product data is mapped to the desired catalog structure and format. The CSV catalog import feature can be used for your entire catalog data, or just portions of them.

The various import and export functions are described in detail in the following.

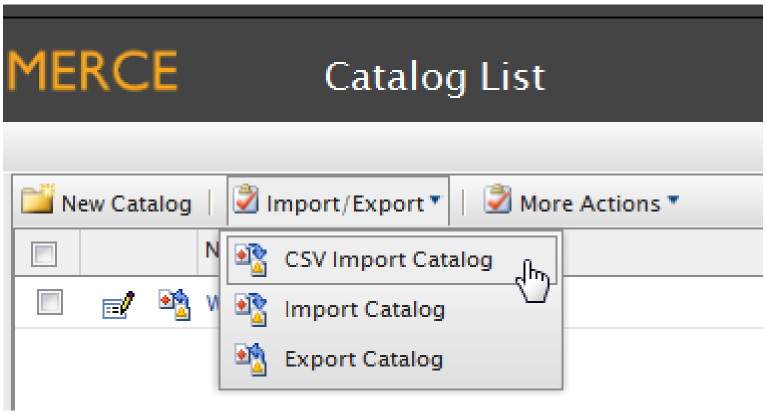
Importing and Exporting Existing Catalogs

Introduction

Existing catalog data can be imported or exported quickly to and from Commerce Manager using the standard catalog **Import/Export feature**. The standard catalog importer imports .zip files exported from Commerce Manager. It is a quick way to import catalogs from other EPiServer Commerce sites and start off with a base to expand your catalog.

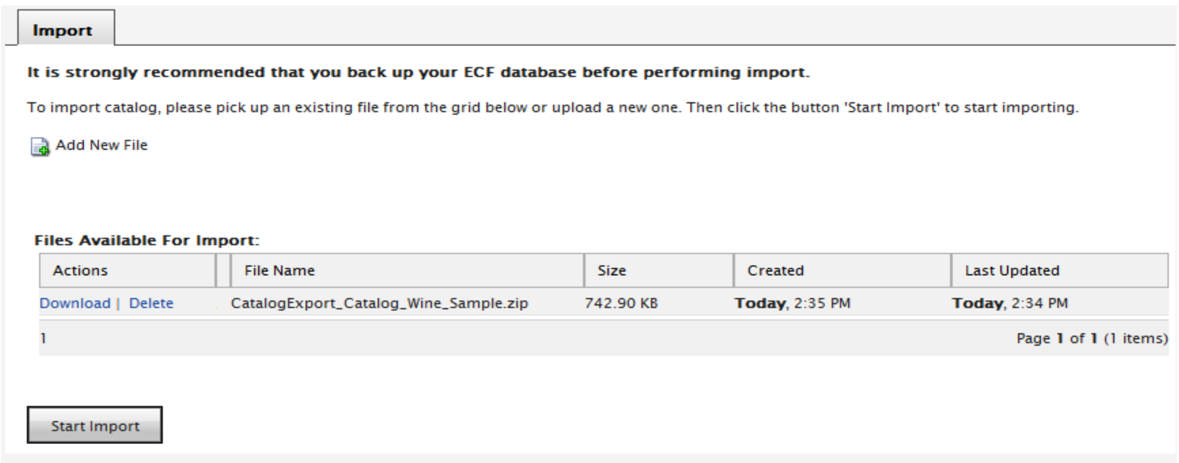
Accessing Import/Export

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. Click **Add New File** and browse and select the file to upload.
2. Click on the **Upload** file button. The files uploaded 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

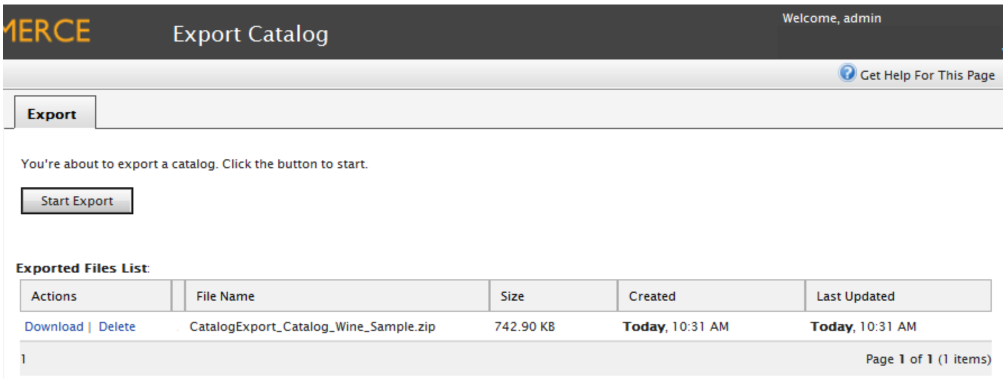
There are two ways to export catalogs in the **Export Catalogs** page.

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.



Importing Catalogs Using CSV Files

Introduction

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 system) 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 system).
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 (Advertizing 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.

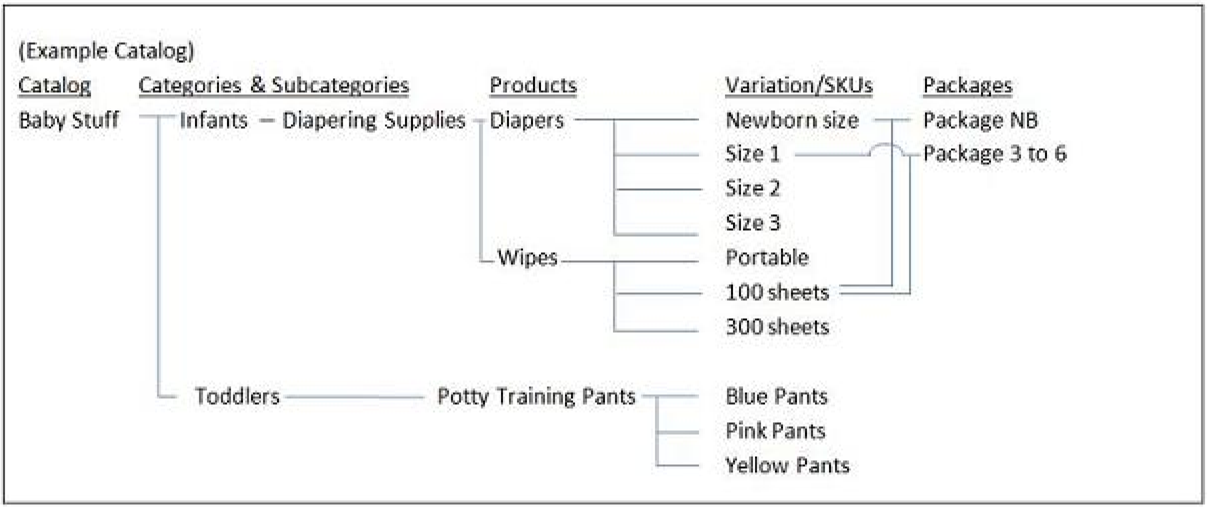


Figure 1

Prerequisite: Create a new catalog

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

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

The example below is based on an a set of sample .csv files.

These files provide the base for the discussion in the following section.

The sample files contain the following:

- 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 1 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 subcategories. 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
1	Action	Category Code	Parent Code	Category Name	Available from	Expires on	Available (True/False
2	Insert	Cat1	null	Infants	1/1/2009	6/1/2009	TRUE
3	Insert	Cat2	null	Toddlers	1/1/2009	6/1/2009	TRUE
4	Insert	Cat10	Cat1	Diapering Supplies	1/1/2009	5/1/2009	TRUE
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	
1	Action	Product Code	Product Name	Entry Type	Category Code	Available from	Expires on	Availa
2	Insert	Prod1	Diapers	Product	Cat10	1/1/2009	6/1/2009	
3	Insert	Prod2	Wipes	Product	Cat10	1/1/2009	5/1/2009	
4	Insert	Prod3	Potty Training Pants	Product	Cat2	1/1/2009	6/1/2009	

Figure 3

	A	B	C	D	E	F	G	
1	Action	Variation Code	Variation Name	Entry Type	Category Code	Available from	Expires on	(
2	Insert	Var1	Diapers - Newborn size	Variation	Cat10	1/1/2009 6:00	10/1/2012 18:00	
3	Insert	Var2	Diapers - size 1	Variation	Cat10	1/1/2009 6:00	10/1/2012 18:00	
4	Insert	Var3	Diapers - size 2	Variation	Cat10	1/1/2009 6:00	10/1/2012 18:00	
5	Insert	Var4	Diapers - size 3	Variation	Cat10	1/1/2009 6:00	10/1/2012 18:00	
6	Insert	Var5	Diapers - size 4	Variation	Cat10	1/1/2009 6:00	10/1/2012 18:00	
7	Insert	Var6	Training Pants - Blue	Variation	Cat2	1/2/2009 11:00	10/1/2012 18:00	
8	Insert	Var7	Training Pants - Pink	Variation	Cat2	1/2/2009 11:00	10/1/2012 18:00	
9	Insert	Var8	Training Pants - Yellow	Variation	Cat2	1/2/2009 11:00	10/1/2012 18:00	
10	Insert	Var9	Baby Wipes - Portable 80 ct	Variation	Cat10	1/2/2009 11:00	10/1/2012 18:00	
11	Insert	Var10	Baby Wipes - 300 ct	Variation	Cat10	1/2/2009 11:00	10/1/2012 18:00	
12	Insert	Var11	Baby Wipes - 700 ct	Variation	Cat10	1/2/2009 11:00	10/1/2012 18:00	
13								
14								

Figure 4

	A	B	C	D	E	F	G	
1	Action	Package Code	Package Name	Entry Type	Category Code	Available from	Expires on	Availal
2	Insert	Package NB	Newborn Package	Package	Cat10	1/1/2009	12/31/2010	
3	Insert	Package3to6	3 to 6 mo Package	Package	Cat10	1/1/2009	12/31/2010	
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	
1	Action	Baby Catalog Association Name	Parent Entry Code	Child Entry Code	Sort Order	A
2	Insert	Accessories	Var1	Var10	1	C
3	Insert	Customers Who Bought This Item Also Bought	Var1	Var2	2	C
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
1	Action	Entry Code	Price	Tax Category	Track Inventory (True/False)	Warehouse	Weight	Package	Min Quantity	Max Quar
2	Update	Var1	16.99	General Sales	TRUE	Default Warehouse	1	box	1	
3	Update	Var2	17.99	General Sales	TRUE	Default Warehouse	1	box	1	
4	Update	Var3	17.99	General Sales	TRUE	Default Warehouse	1	box	1	
5	Update	Var4	18.99	General Sales	TRUE	Default Warehouse	1	box	1	
6	Update	Var5	18.99	General Sales	TRUE	Default Warehouse	1	box	1	
7	Update	Var6	25.99	General Sales	TRUE	Default Warehouse	1	box	1	
8	Update	Var7	25.99	General Sales	TRUE	Default Warehouse	1	box	1	
9	Update	Var8	25.99	General Sales	TRUE	Default Warehouse	1	box	1	
10	Update	Var9	4.49	General Sales	TRUE	Default Warehouse	1	box	1	
11	Update	Var10	15.99	General Sales	TRUE	Default Warehouse	1	box	1	
12	Update	Var11	25.99	General Sales	TRUE	Default Warehouse	1	box	1	
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 system 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 checkboxes.
  - 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 system.
- 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.

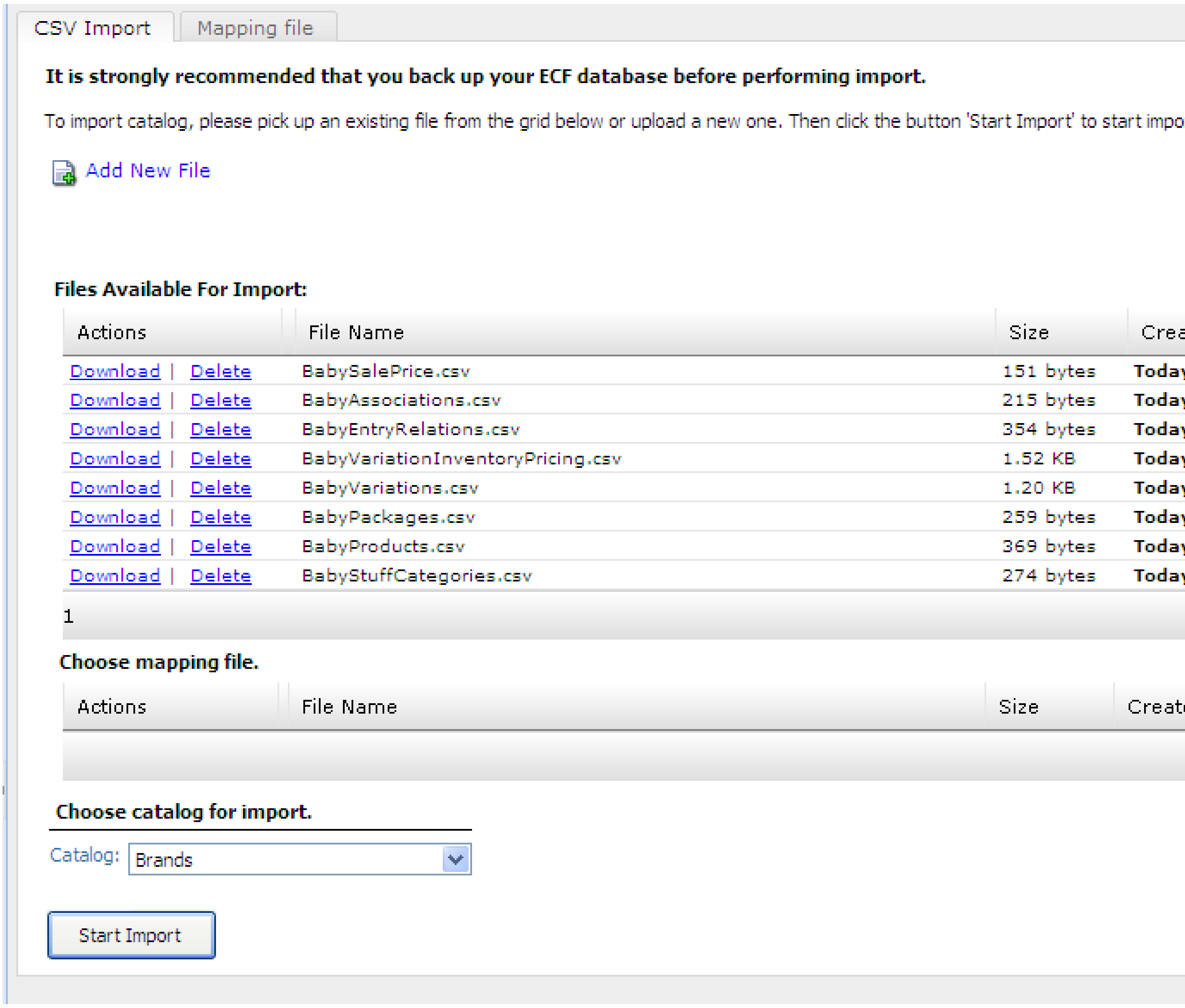


Figure 10

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.

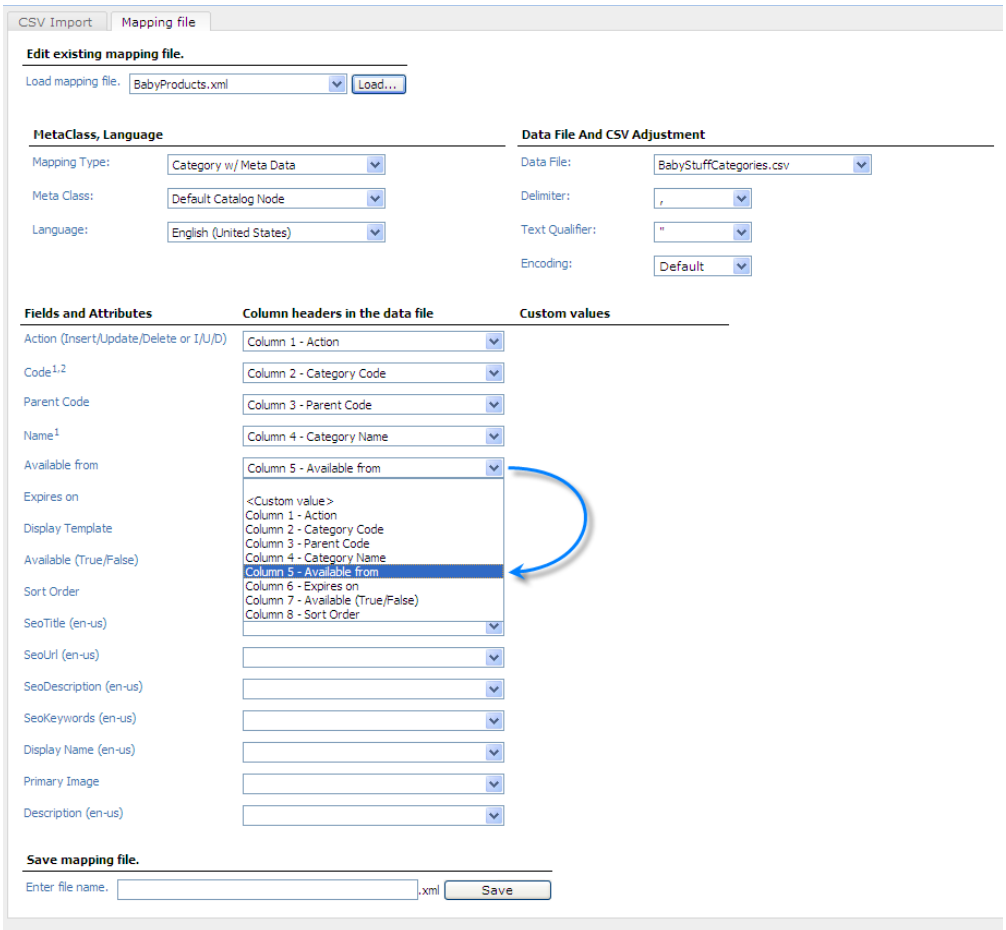


Figure 11

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 fle 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.

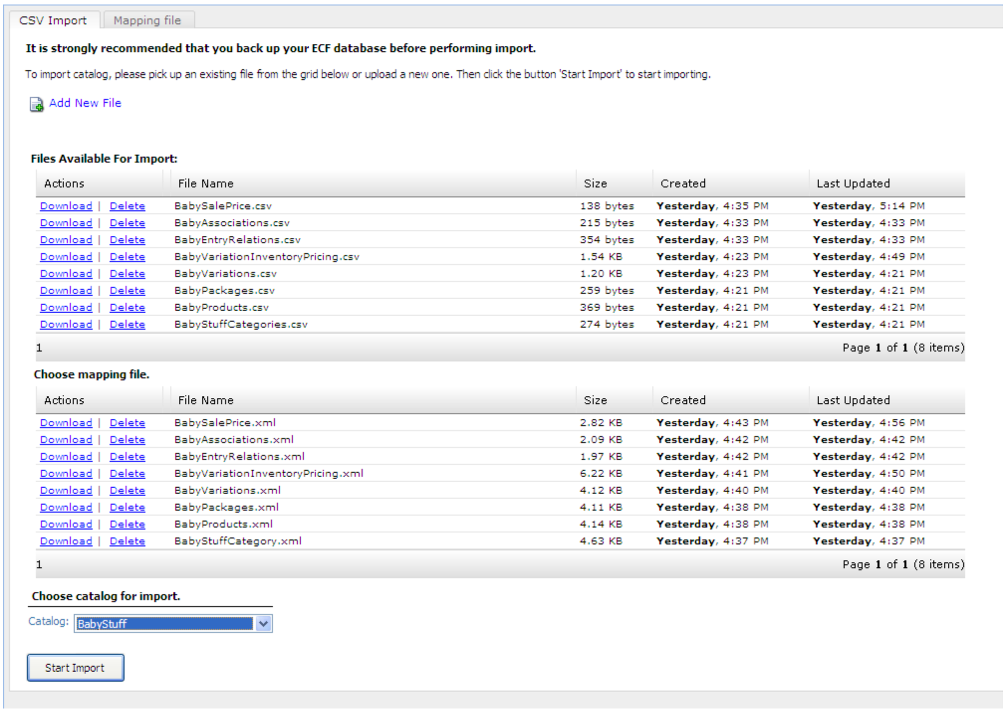


Figure 12

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".

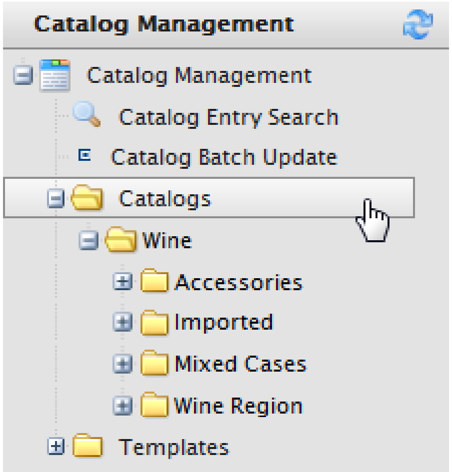
- Click the "Start import" button. You will see the "Importing catalog" modal dialog box which will notify you of the percentage of completion as well as logging messages.
- Click "Close Window" at the bottom of the modal dialog to complete the operation.
- Repeat Step 4 to import all the remaining CSV & Mapping pairs.

Step 6. Verify Your Import

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

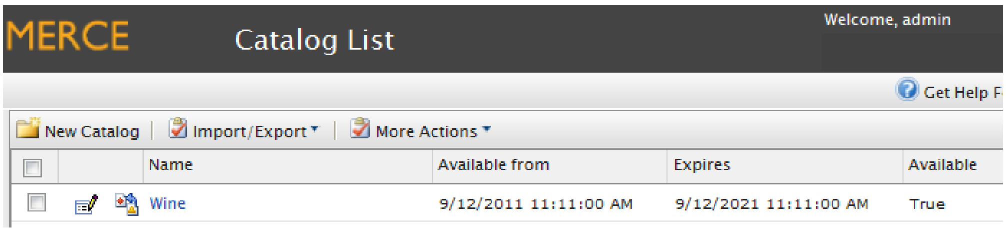
Browsing Catalogs

Catalogs and their related products and SKUs can be viewed and explored under **Catalog Management.** Click on **Catalogs** to browse the list of catalogs.



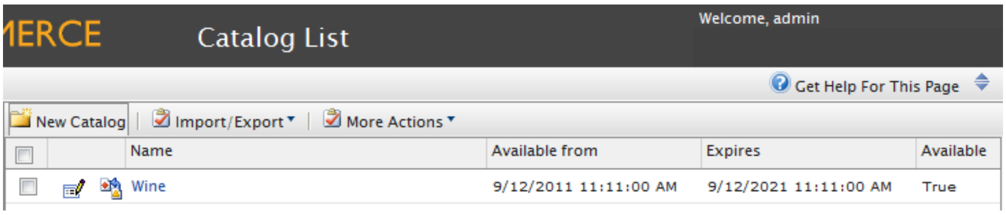
The **Catalog List** page shows the **Wine** sample node by default, together with associated sub-categories:

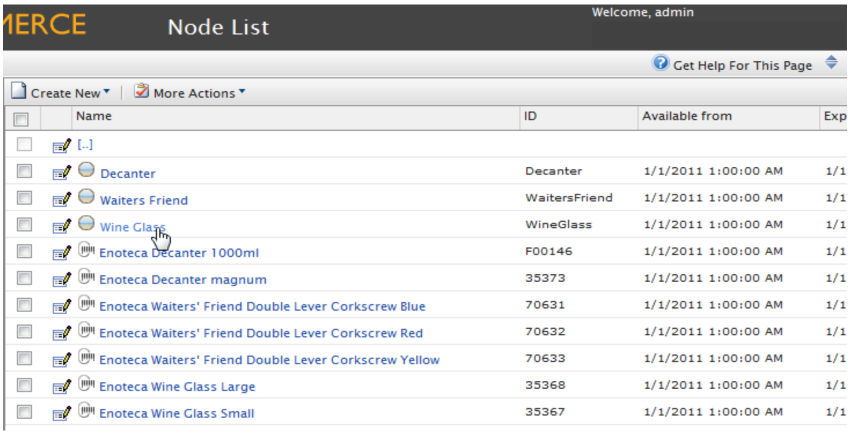
- **Accessories**
- **Imported**
- **Mixed Cases**
- **Wine Region**



Clicking on the **Edit** 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** name ("Wine") will take you to the **Node List** page, which displays the list of subcategories under the selected catalog. To browse products, click on a **Catalog** and drill down in the categories until you see the **products and SKUs**.

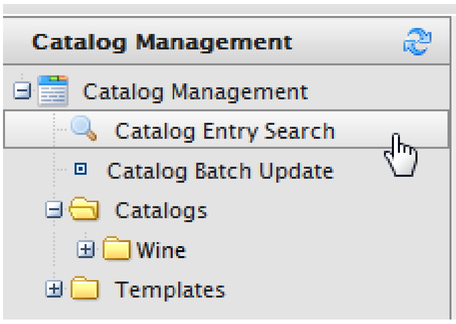




Searching for Catalog Entries

Introduction

The **Catalog Search** function enables you look for specific sales items stored in EPiServer Commerce. Click on **Catalog Management** and then **Catalog Entry Search**.



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

If you enter keywords inside quotation marks ("white bordeaux"), 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.

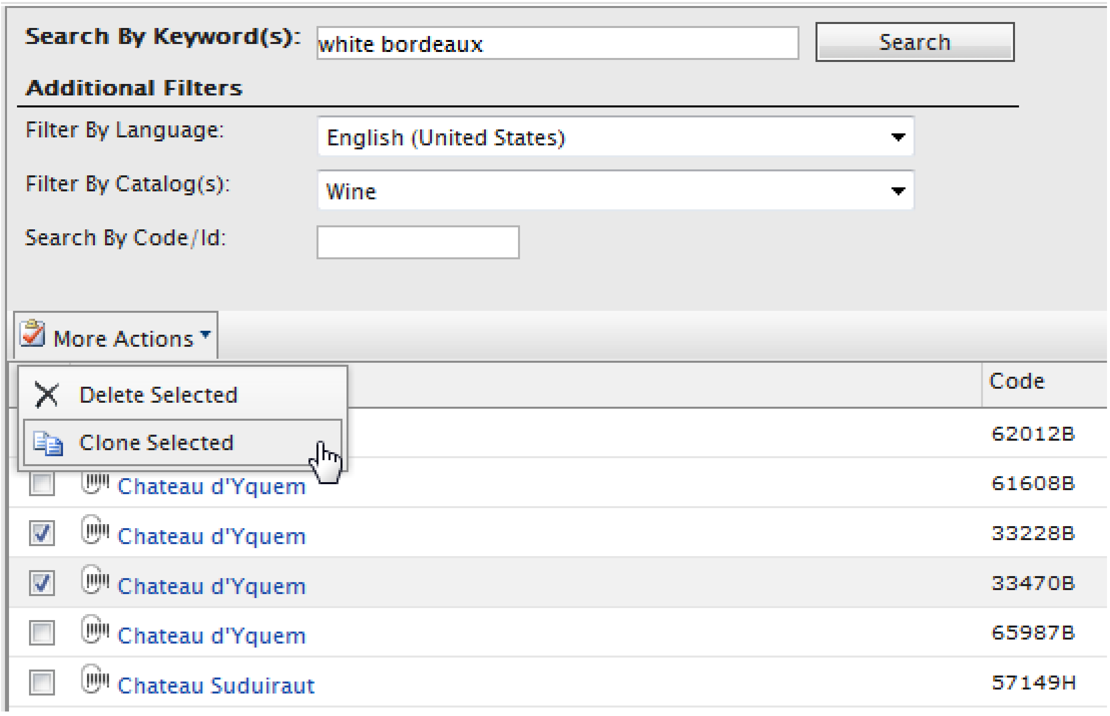
- **Filter by language**: Pull-down menu will show the available language choices
- **Filter by catalog(s)**: Pull-down menu will show the available catalog choices
- **Search by code/id**: Instead of text, you can search by code or ID

Deleting and Cloning Entries

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

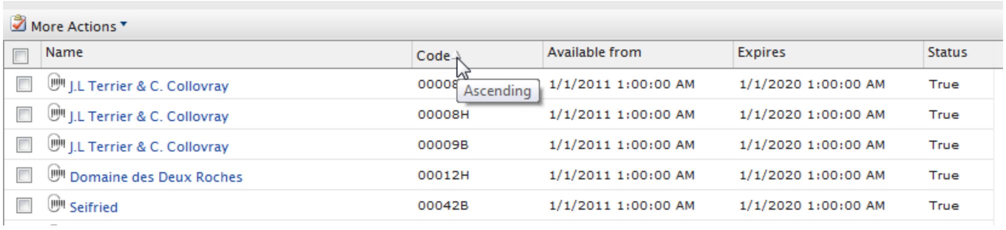
1. Select an entry or entries by selecting the box next to it.
2. Click on **More Actions**.
3. Click on **Delete Selected** or **Clone Selected** .

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

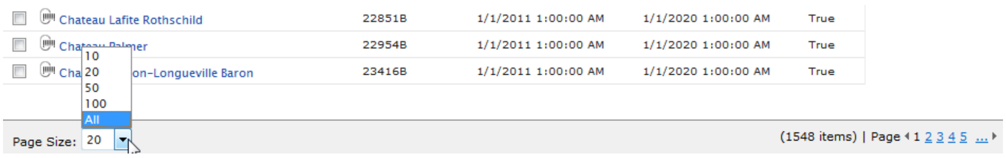


Paging and Sorting Results

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



The **Page Size** (number of items to be displayed on a page) can be set at the bottom of the search result page, where there is also a paging function for browsing the search result.



Creating Catalogs

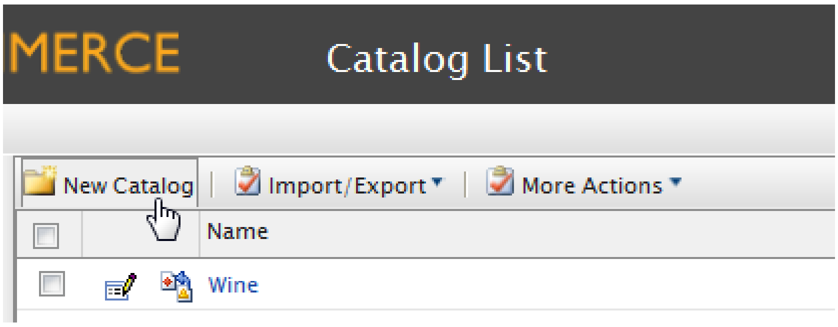
Introduction

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*.

Creating a Catalog

Do the following to create a new catalog:

1. Go to **Catalog Management**, click **Catalogs** and then **New Catalog** in the **Catalog List**.

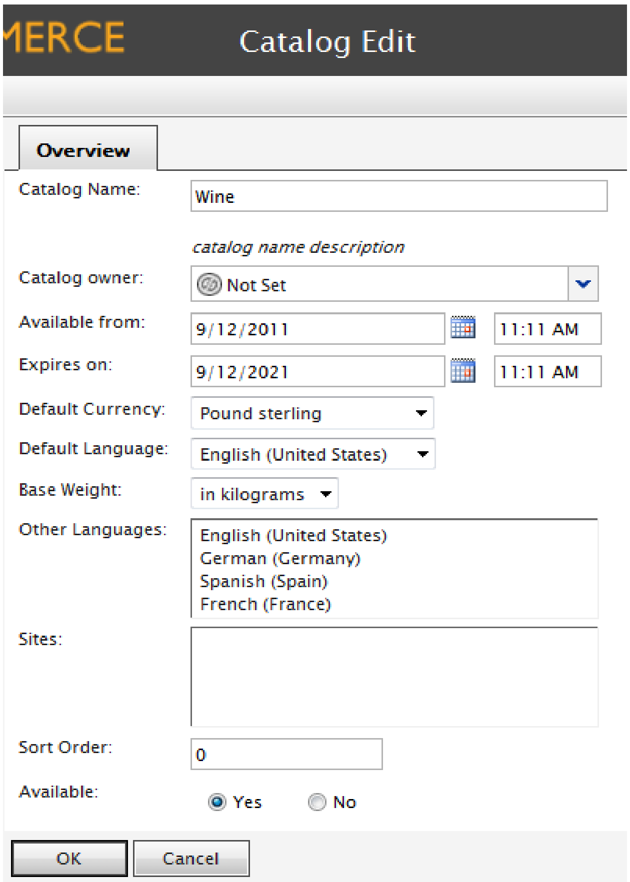


2. Enter the details of the catalog in the **Catalog Edit** page. The following options are available:

   - **Catalog Name** - this name will appear in the Catalog List Page ("Wine").
   - **Catalog Owner** - designate an existing user as the Catalog owner.
   - **Available from** - enter a date and time you want the catalog to be available and seen publicly.
   - **Expires on** - enter the date and time you want to catalog to be unavailable and not be seen publicly.
   - **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, if you have multiple sites.
- **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.

3. 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.



Setting the Availability of a Catalog

Each catalog can be listed as **available** or **unavailable**, and you can set an **Available from** and **Expires on** date and time when you want the catalog to be public.

You can set the availability of a catalog for a variety of purposes. For example, if you are a clothing store and wish to only make your summer catalog available during the summer months, you can set that up. In this way, future revisions to items and pricing can be prepared easily and reviewed in advance of the release date to the site.

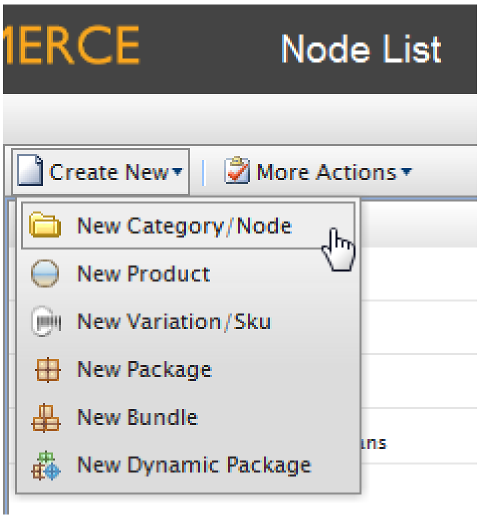
Creating Categories

Introduction

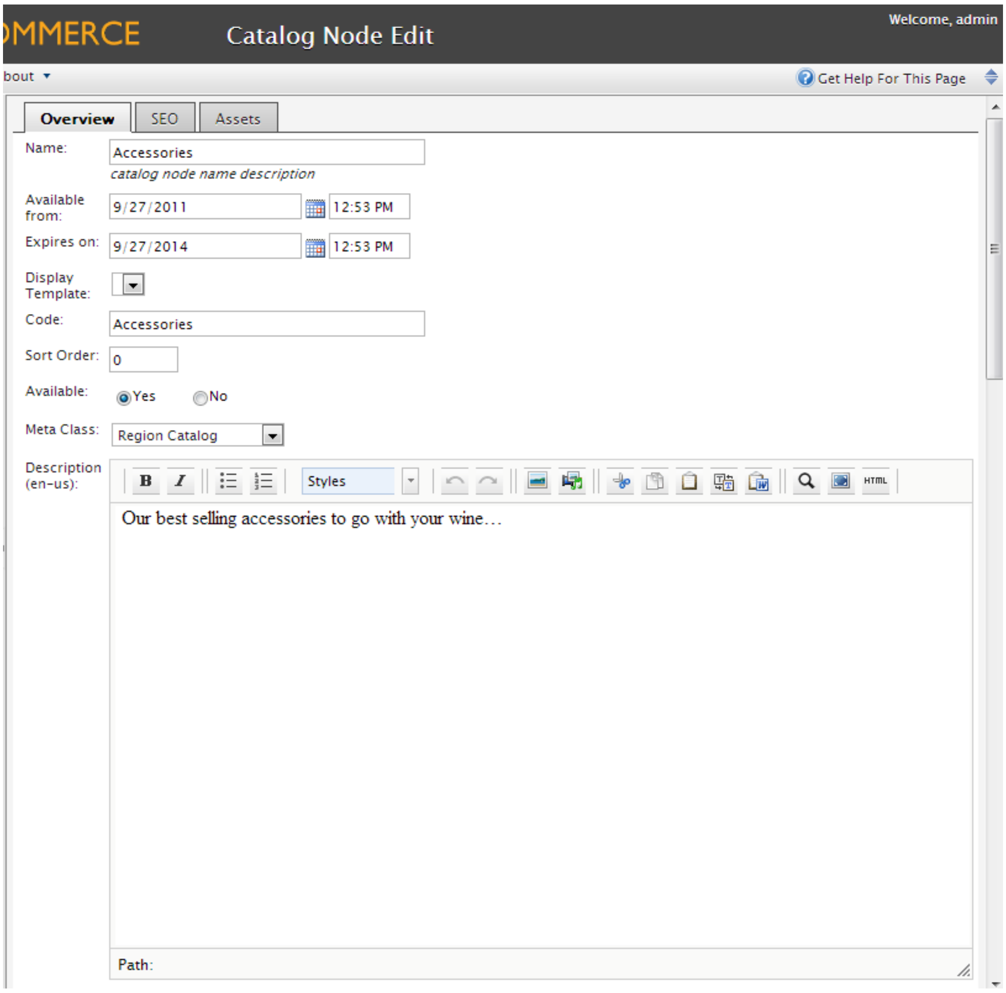
Individual catalogs are broken down into categories and subcategories. Categories, also known as "nodes", allow you to structure and categorize your catalog entries. For example, if you run an online store selling smartphones, you may want to separate individual brands as different categories, rather than lump all of your catalog entries into a single category. Categorization is key to organized, manageable catalogs.

Creating a Category

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



2. 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.



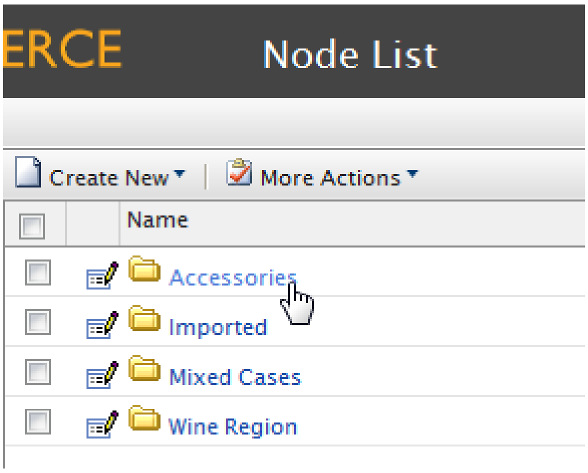
3. For available options, see below. Once done, click **OK** to save your changes.

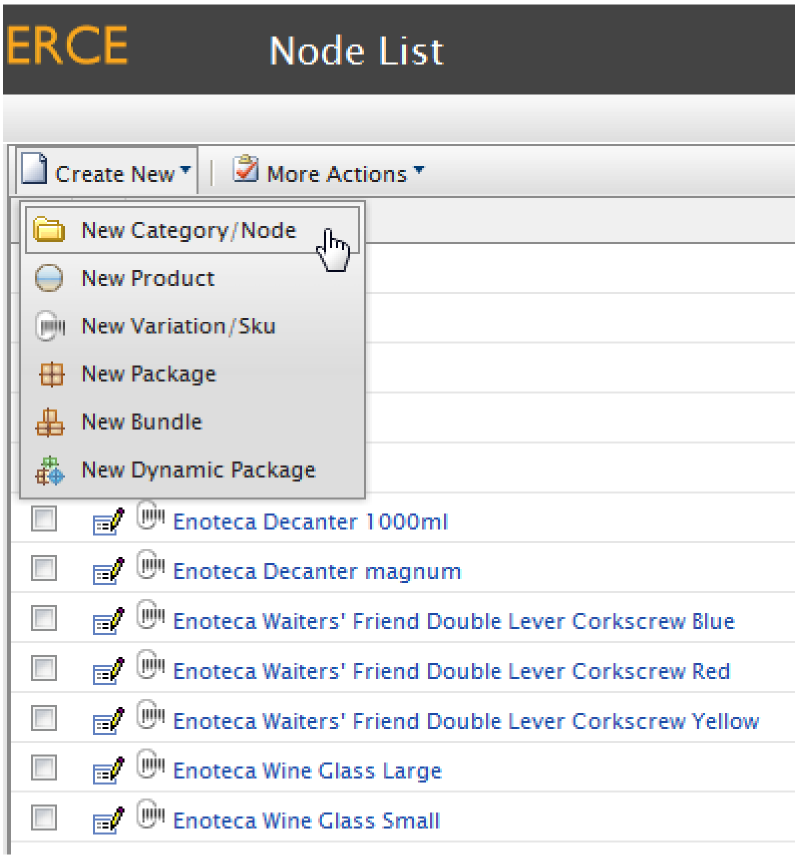
    - **Name** - enter a name for the product.
    - **Available from** - the date to which the product is activated.
    - **Expires on** - the date on which the product expires; once the expiration date passes, the product will no longer appear on the public site.
    - **Display Template** - if applicable, chose a display template used to show the products in the public site from this drop-down box.
    - **Code** - enter a product code here (e.g. Accessories)
    - **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 here dictates which of the meta-fields or product attributes will appear on the site.
    - **Display Name** - enter a name the way you like to use on the public site.
    - **Primary Image** - use the browse button to select and upload an image here.
    - **Description** - enter a description of a product.

Creating a Subcategory

Creating a subcategory 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.





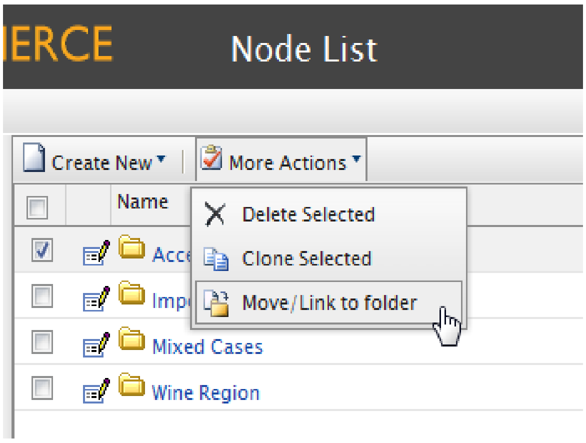
Cloning, Moving or Linking Categories

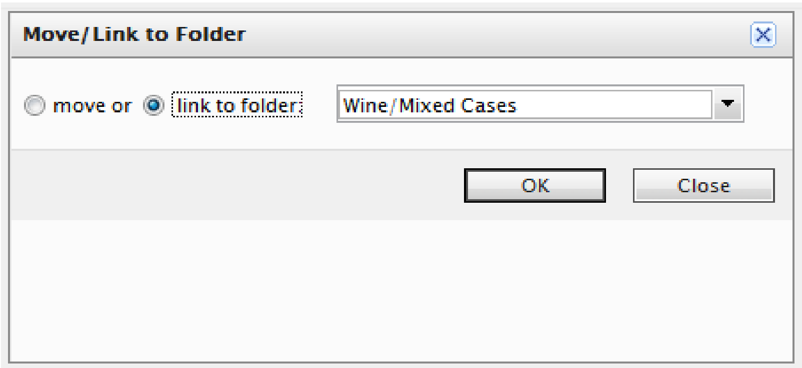
Cloning creates a duplicate with a unique ID that you can place in any location/hierarchy of your choice.

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. You can for example 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 to a category, go to the **Node List** and select the category you want to link back to.
2. Click **More Actions** and then click on the **Move/Link to folder** option.
3. Select link to folder and select the link destination from the drop-down menu. Click **OK** to create the link to that category under that directory.





SEO for Categories

You can work with **SEO (Search Engine Optimization)** for product categories. Refer to the section *SEO for Catalog Items* for information on how to work with SEO.

Assets for Categories

You can relate **assets** to product categories. Refer to the section *Assets for Catalog Items* for information on how to work with SEO.

Creating Products

Introduction

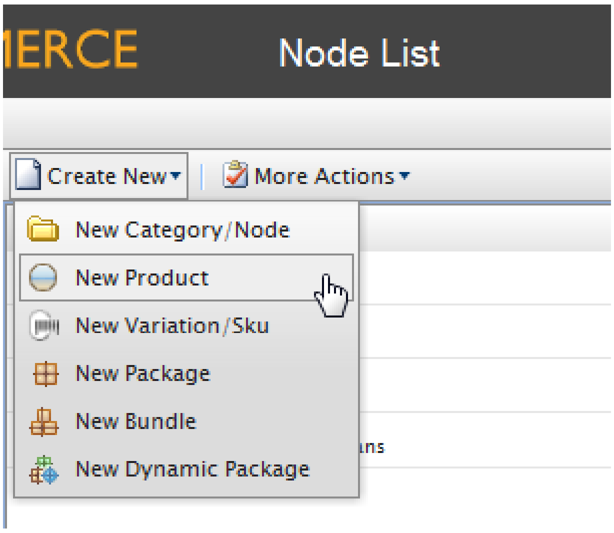
A "product" is a central part of the e-commerce store. A product can have "variations" or SKUs (Store Keeping Units). For example, a product can be a "red shirt" and a variation/SKU for that shirt would then be "size".

Products can be seen as "parents" to their variations/SKUs, although it is not a true parent-child hierarchical relationship and this view is mainly used internally for organizing and displaying a product structure. You can configure to have products displayed on the front-end site with a drop-down for the different variations/SKUs. This type of product/SKU relationship display customization is typical in an implementation, but does not work directly out-of-the-box.

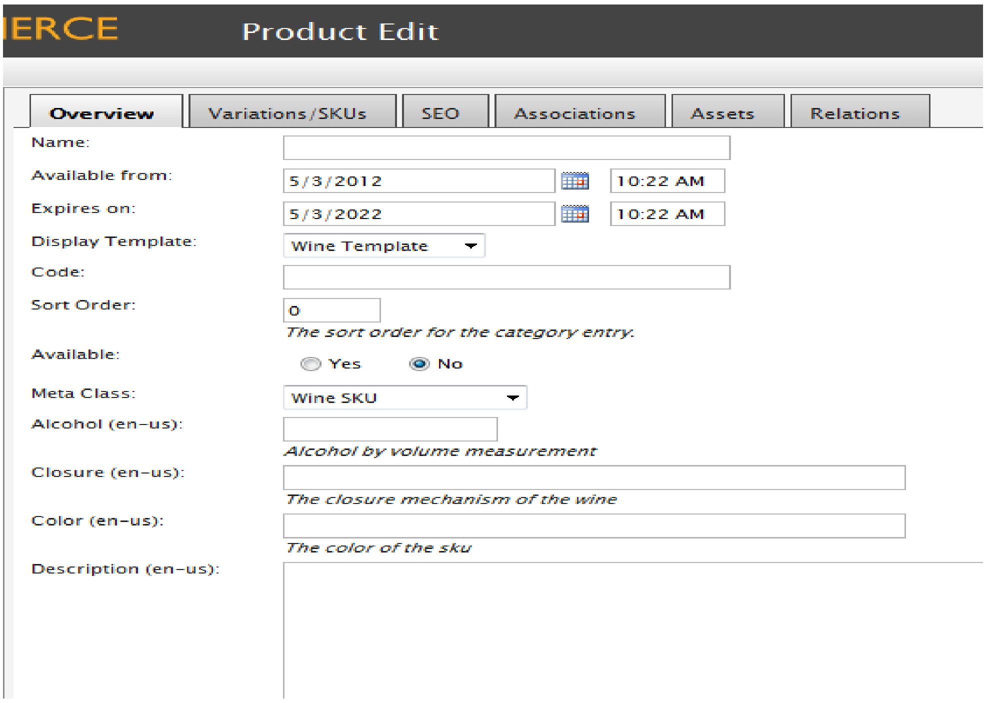
If your catalog items will have no variations/SKUs, then you can either create all as SKUs and not have products, or you can use only products. In order to only use products, work with your developers to add the **Pricing/Inventory** tab to the product details page. Refer to Setting Pricing Data at the Product Level in the Developer Documentation for EPiServer Commerce.

Creating a Product

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

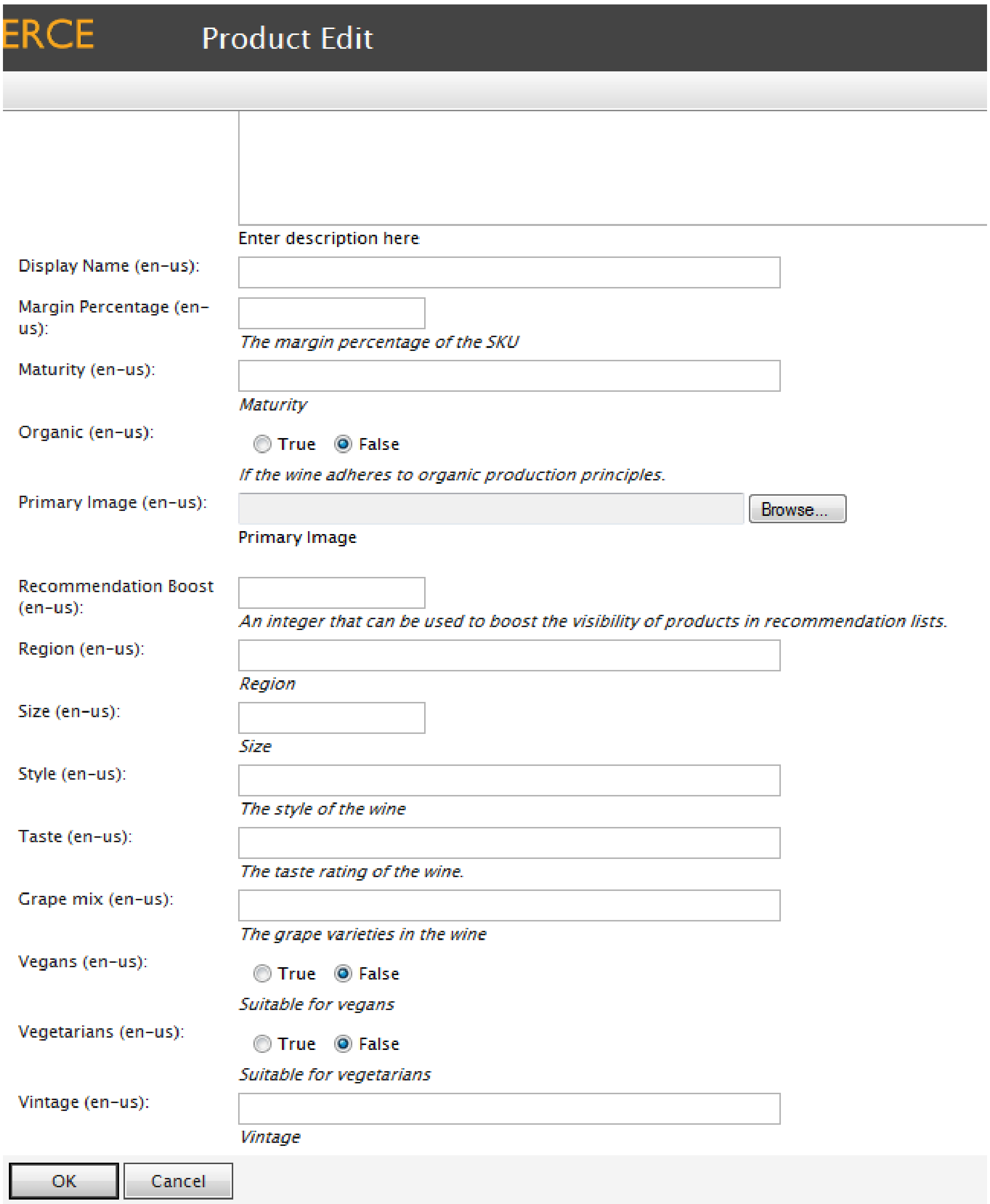


The **Overview** tab is where you enter basic information about a product.



Field	Description
Name	Enter a friendly name, which can include spaces and special characters.
Available from	Enter the date and time the product will be available and active.
Expires On	Enter the date and time the product will be unavailable and deactivated.
Display Template	Chose a display template used to display the product in the public site from this drop-down menu.
Code	Enter a value without special characters or spaces, such as "BlueShirtXL."
Sort Order	Enter a numerical value to determine the product sort order on the node list page.
Available	Set "Yes" to activate the product. Set "No" to keep the product inactive and unsearchable on the front-end site.
Meta Class	Select a *Meta Class* from the drop-down menu. Depending on the meta class you select, additional fields will appear in the Overview tab. The values entered within the fields of the meta class you selected will be shown on the front-end public site. Note that *meta classes must be created first* to become available in the list.

Depending on the *meta class* selected, more fields may become available. For instance, selecting the **Wine SKU** meta class will yield wine related meta fields and attributes.

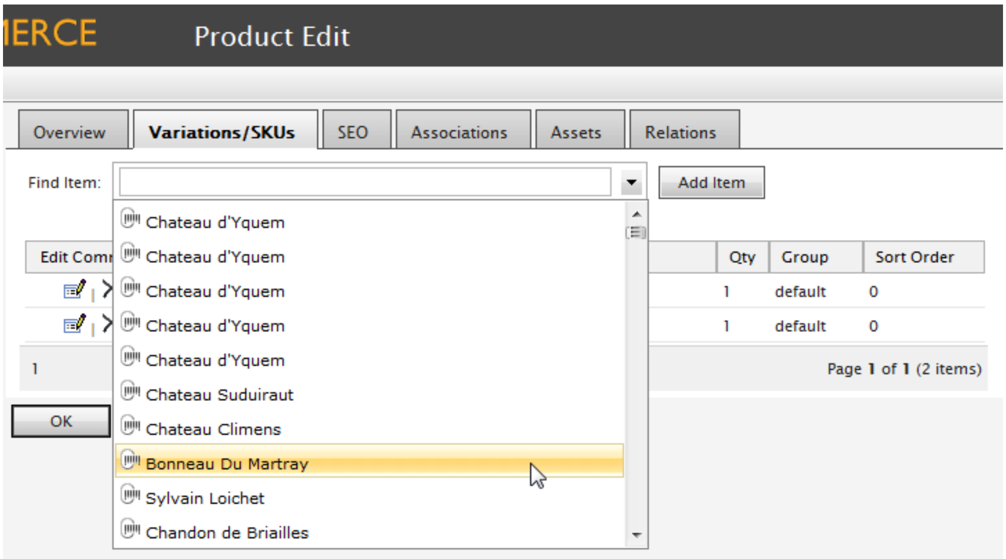


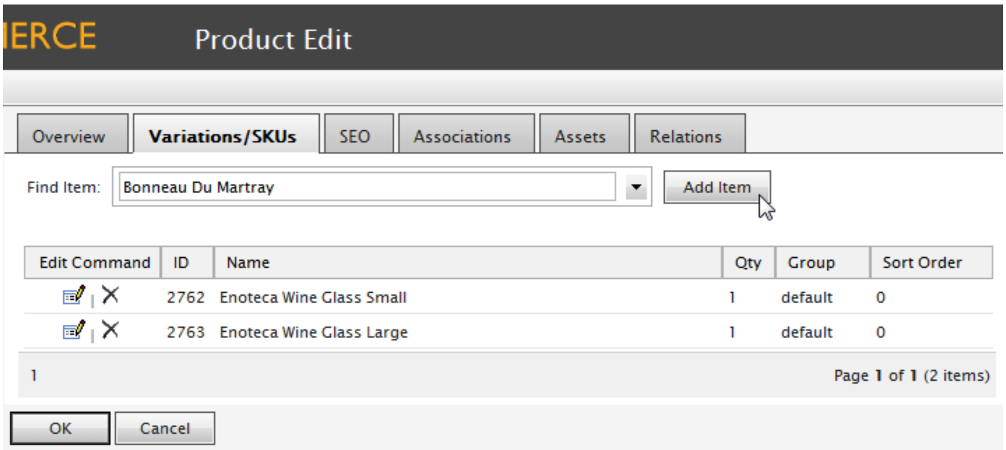
Adding Variations/SKUs

Variations/SKUs are subcategories of a product, which represent different "variations" of the particular product (colors, sizes, different editions for example). Such Variations/SKUs can be grouped together with a chosen product. 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 for Products

You can work with **SEO (Search Engine Optimization)** for products. Refer to the section *SEO for Catalog Items* for more information.

Associations for Products

You can work with **associations** for products. Refer to the section *Associations for Catalog Items* for more information.

Assets for Products

You can relate **assets** to products. Refer to the section *Assets for Catalog Items* for more information.

Relations for Products

You can work with **relations** for products. Refer to the section *Relations for Catalog Items* more information.

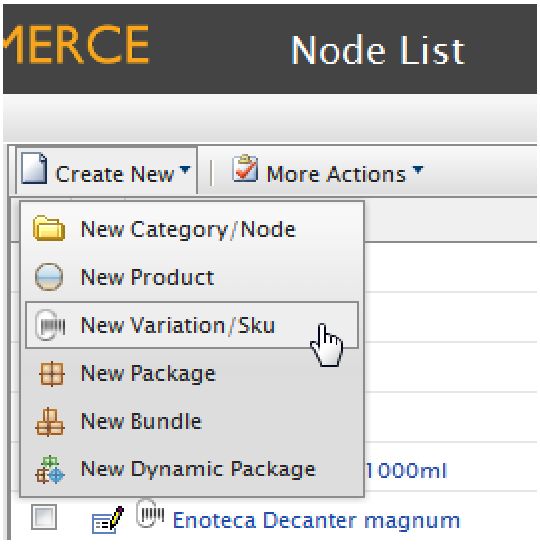
Creating Variations (SKUs)

Introduction

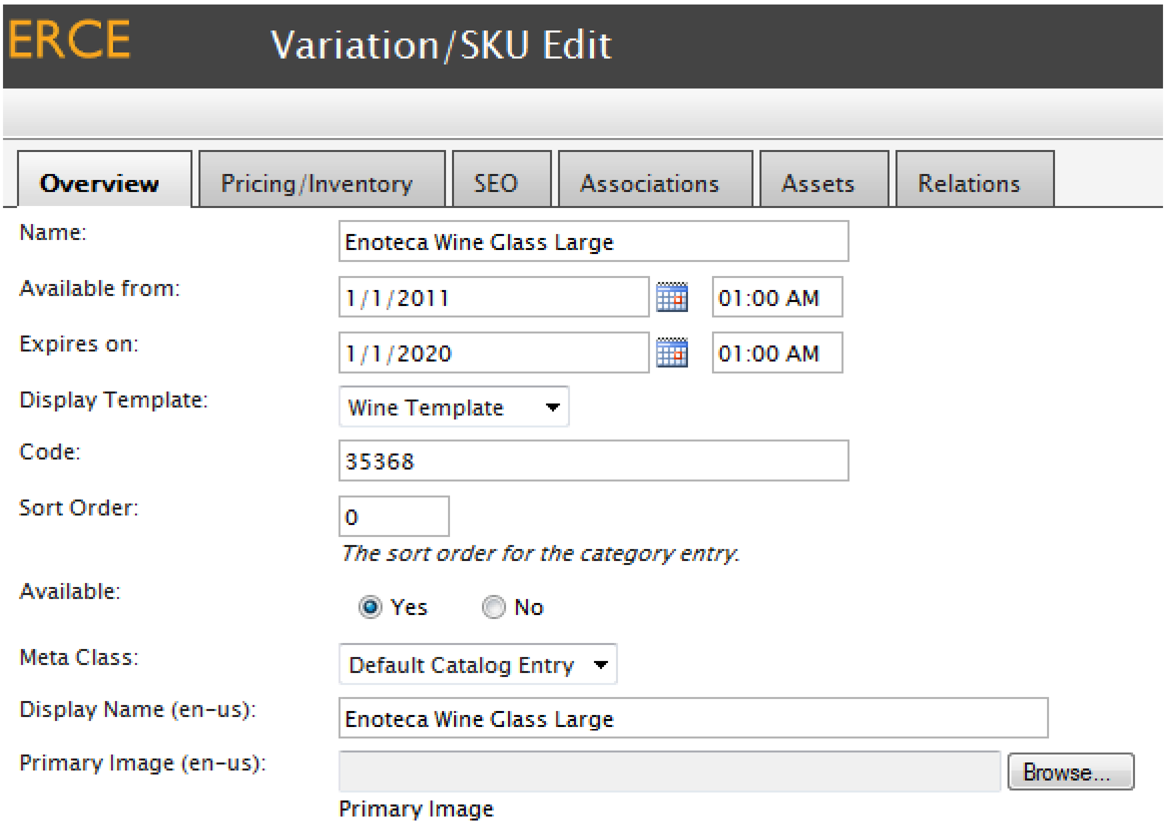
A product can have "variations" or SKUs (Store Keeping Units). For example, a product can be a "red shirt" and a variation/SKU for that shirt would then be "size". Variations/SKUs can be linked to products to create a product structure that can be used for organizing and displaying products on the website.

Creating a Variation/SKU

To create a product **variation/SKU**, click through an existing catalog and click on **Create New** and then select **New Variation/SKU.**



Go to the **Overview** tab to enter basic information about the variation/SKU.



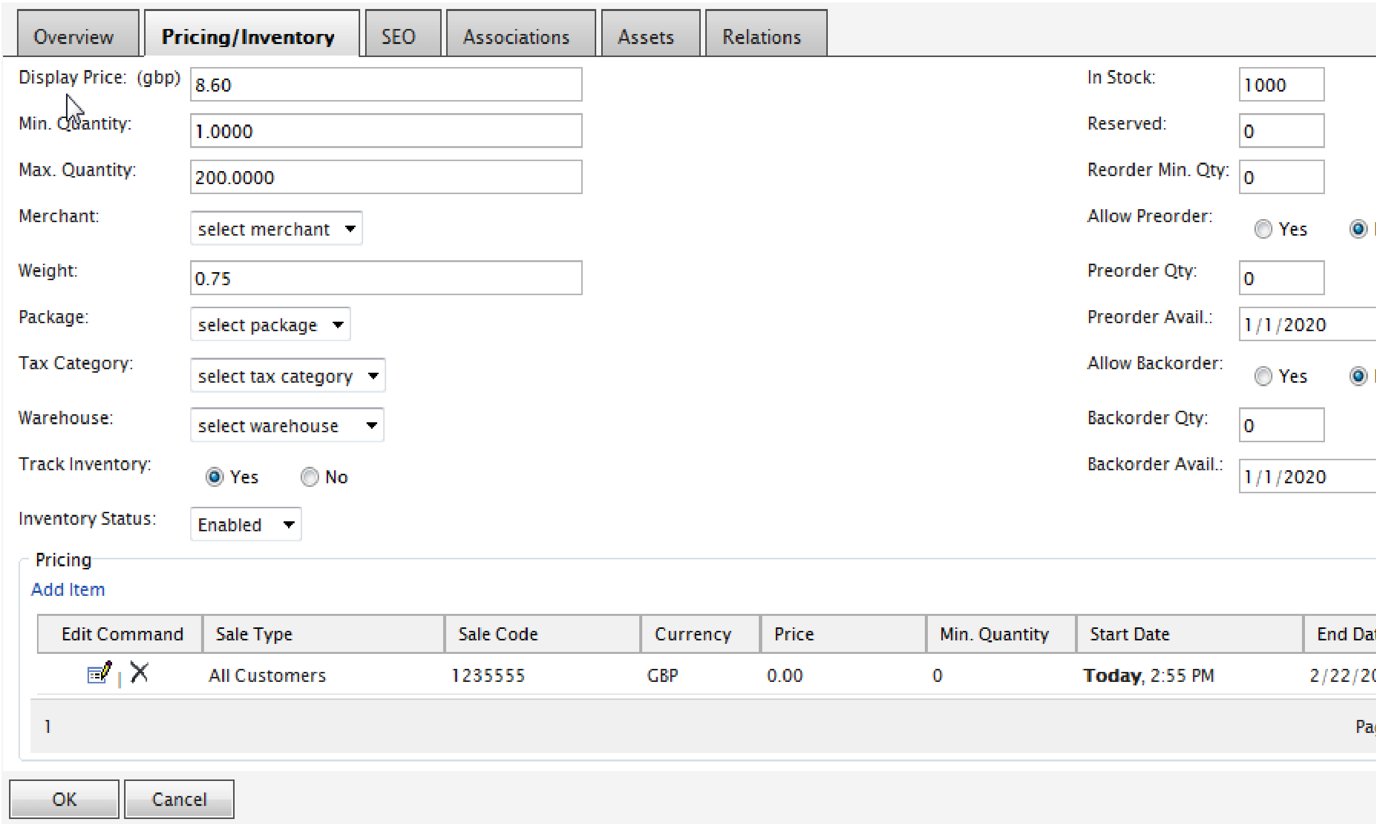
Field	Description
Name	Enter a friendly name, which can include spaces and special characters.
Available from	Enter the date and time the SKU will be available and active.
Expires On	Enter the date and time the SKU will be unavailable and deactivated.
Display Tem-	Chose a display template used to display the Variation/SKU in the public site from this

Field	Description
plate	drop-down menu.
Code	Enter a value without special characters or spaces, such as "BlueShirtXL."
Sort Order	Enter a numerical value to determine the SKU's sort order on the node list page.
Available	Set "Yes" to activate the SKU. Set "No" to keep the SKU inactive and unsearchable on the front-end site.
Meta Class	Select a *Meta Class* from the drop-down menu. Depending on the meta class you select, additional fields will appear in the Overview tab. The values entered within the fields of the meta class you selected will be shown on the front-end public site. Note that *meta classes must be created first* to become available in the list.

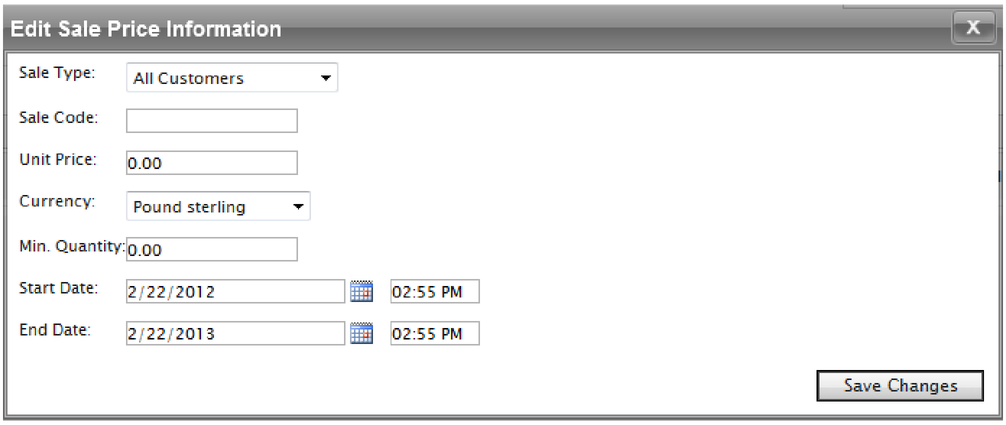
Depending on the *meta class* selected, more fields may become available. For instance, selecting the **Wine SKU** meta class will yield wine related meta fields and attributes.

Adding Pricing/Inventory Details

Under this tab, you can set specific pricing and inventory settings for the variation/SKU.



Clicking on **Add item** will open the **Edit Sale Price Information** dialog for adding pricing information.



Field	Description
Display Price	Enter the price that will be displayed on the public site.
Min Quantity	This sets the minimum quantity the customer is able to purchase the variation/SKUs product page.
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 drop-down 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 drop-down 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** system.
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

Field	Description
	in the "Low Stock Report" in the Dashboard or Reporting system.
Allow Pre-order/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** - This is an **optional** setting. The Sale Code field is used for assigning a price to a specific group of customers. For instance, when you add a new price and select "Customer Price Group" as the Sale Type, you need to put the name of the customer group in the Sale Code field. The name of the group that you put in the Sale Code field needs to match one of the group names found under **Customer Management > Contacts > (Name of Contact)**. If your entry into the Sale Code field matches one of the Customer Groups, any member of that group will receive the specified price. **Unit Price** - discounted price per unit *Currency * enter currency using the correct currency code (i.e. GBP); 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.

A SKU can only have **one warehouse** associated to it.

SEO for Variations/SKUs

You can work with **SEO (Search Engine Optimization)** for variations/SKUs. Refer to the section *SEO for Catalog Items* for more information.

Associations for Variations/SKUs

You can work with **associations** for variations/SKUs. Refer to the section *Associations for Catalog Items* for more information.

Assets for Variations/SKUs

You can relate **assets** to variations/SKUs. Refer to the section *Assets for Catalog Items* for more information.

Relations for Variations/SKUs

You can work with **relations** for variations/SKUs. Refer to the section *Relations for Catalog Items* more information.

Creating Packages

Introduction

A **package** is an offering of numerous items, but it is comparable to an individual SKU because the package items must be purchased as a whole. For example, the matching shirt and hat combination is shrinkwrapped together and sold as a single unit. The package has its own SKU and it is displayed as a single line item in the user's shopping basket.

Creating a Package

1. Click on **Catalogs**. The **Catalog List** appears in 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.

Enter basic information for 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 drop-down box.
- **Code** - enter a Product Package code here.
- **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

Adding Pricing/Inventory Details

- **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 drop-down 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 drop-down 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 drop-down 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 (for instance Dealers).
  - **Unit Price** - discounted price per unit.
  - **Currency** - enter currency using the correct currency code (for instance 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.

  For more information regarding Sales Type, Sales Code and tiered pricing, please read *Creating a Contact*.

Adding Package Items

In the drop-down, 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 for Packages

You can work with **SEO (Search Engine Optimization)** for packages. Refer to the section *SEO for Catalog Items* for more information.

Associations for Packages

You can work with **associations** for packages. Refer to the section *Associations for Catalog Items* for more information.

Assets for Packages

You can relate **assets** to packages. Refer to the section *Assets for Catalog Items* for more information.

Relations for Packages

You can work with **relations** for packages. Refer to the section *Relations for Catalog Items* more information.

Creating Bundles

Introduction

A **bundle** is a collection of variations/SKUs allowing customers to purchase two or more items at once. These are presented on the front-end to the customer as a bundle, but added to the shopping basket as each separate variation/SKU. For example, a matching shirt and hat may be presented together on the front-end so that the user can buy both items at once. In their shopping basket though they will see each item listed separately.

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.

Enter basic information for the bundle:

- **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.
- **Code** - enter a Bundle code here.
- **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

Adding Bundle Items

In the drop-down, 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 for Bundles

You can work with **SEO (Search Engine Optimization)** for bundles. Refer to the section *SEO for Catalog Items* for more information.

Associations for Bundles

You can work with **associations** for bundles. Refer to the section *Associations for Catalog Items* for more information.

Assets for Bundles

You can relate **assets** to bundles. Refer to the section *Assets for Catalog Items* for more information.

Relations for Bundles

You can work with **relations** for bundles. Refer to the section *Relations for Catalog Items* more information.

Creating Dynamic Packages

Introduction

A **dynamic package** is similar to the Package definition above (numerous items in the package but with a single defined SKU) with the added ability to configure the package and its contents during checkout. For example, a clothing company has a "Create your Own Outfit" option on their site. The dynamic package would be a shirt, a pair of pants, and an accessory that the user chooses from a selected list.

It is important to note that for your dynamic package to work correctly, you must work with your developer to configure it correctly so that your users may choose the desired options. In addition, dynamic packages cannot be ordered and checked out from Commerce Manager but must be configured to work on the front-end site.

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.

Enter basic information for the dynamic 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 drop-down box.
- **Code** - enter a Dynamic Package code here.
- **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

Adding Package Items

In the drop-down, 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 for Dynamic Packages

You can work with **SEO (Search Engine Optimization)** for dynamic packages. Refer to the section *SEO for Catalog Items* for more information.

Associations for Dynamic Packages

You can work with **associations** for dynamic packages. Refer to the section *Associations for Catalog Items* for more information.

Assets for Dynamic Packages

You can relate **assets** to dynamic packages. Refer to the section *Assets for Catalog Items* for more information.

Relations for Dynamic Packages

You can work with **relations** for dynamic packages. Refer to the section *Relations for Catalog Items* more information.

Managing Catalog Details

In this section you will learn how to add and manage details associated with catalogs and catalog items. Depending on whether you are working with products, variation/SKUs, packages, bundles or dynamic packages, you will have different options available for adding product details or linking to other catalog items.

At every level of your catalog you have **Search Engine Optimization (SEO)** attributes that you can add, as well as **assets** such as videos or product brochures. You may also create product **associations** which create relationships between product catalog items. Product associations can be leveraged to create **relationships** like "Product Accessories" or "You May Also Like". You can also do **updates for multiple items** in large product catalogs.

SEO for Catalog Items

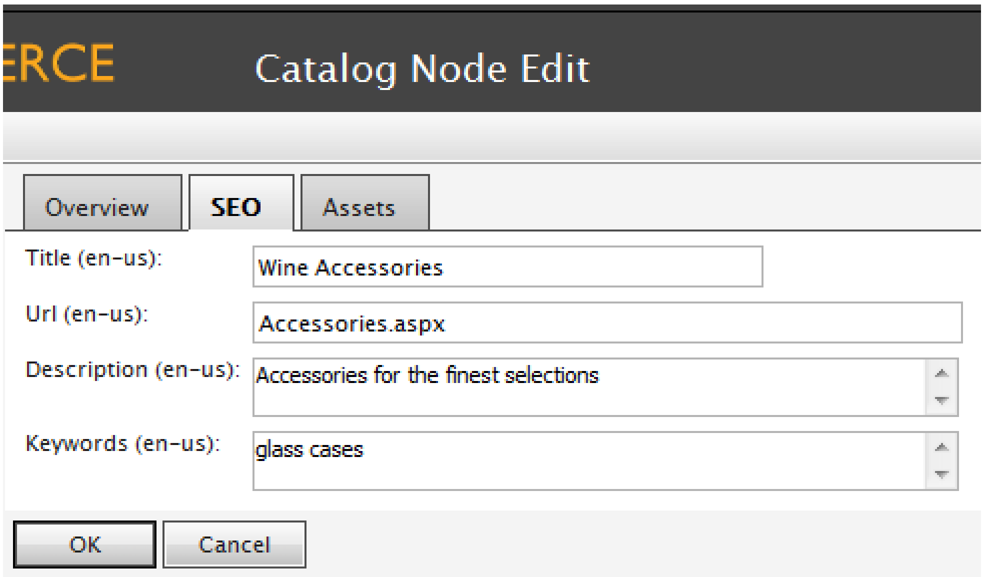
Introduction

Search Engine Optimization (SEO) is available on every level of your catalog: categories, products, variations/SKUs, packages, bundles and dynamic packages. You will see this **SEO tab** within all of your details pages. By default, if you do not put in any information in this area, the **name** of your item will be added as the **SEO Title** here

Adding SEO Attributes

Open a catalog item for editing, and select the **SEO** tab. The following attributes are available:

- **Title** - this is the title that will appear on the title bar of your web browser if you choose to display this category. It also supports SEO.
- **URL** - the URL linking the category can be changed. If the field is left empty, it will be automatically filled in with a generated URL based on the entry name. If the URL field is not empty, 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.
- **Description** - enter a description that search engines will use to represent the page in search results.
- **Keywords** - enter various relevant keywords separated by commas, words that will help make your category page retrievable and relevant to search engines. For example, if the page is related to "cell phones", you may have a list of keywords such as "cell, phones, accessories, mobile, wireless".



Associations for Catalog Items

Introduction

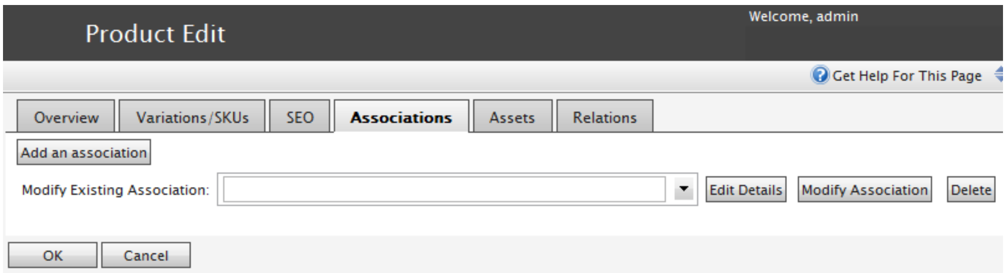
Merchandising involves the promotion of products in various contexts. Promote new, popular, or sale products by displaying them as featured products in category and search result pages. You can display your top selling products in your store over a defined interval. They can be displayed on the site home page, category, or product pages.

Common examples of the usage of associations are the display of "Product Accessories" or up-selling/cross-selling items with "You May Also Like" type of displays. Associations can be added from the **Associations** tab for any of the individual catalog items such as Product Entries, SKUs, Bundles, Packages, and Dynamic Packages.

Adding a Product Association

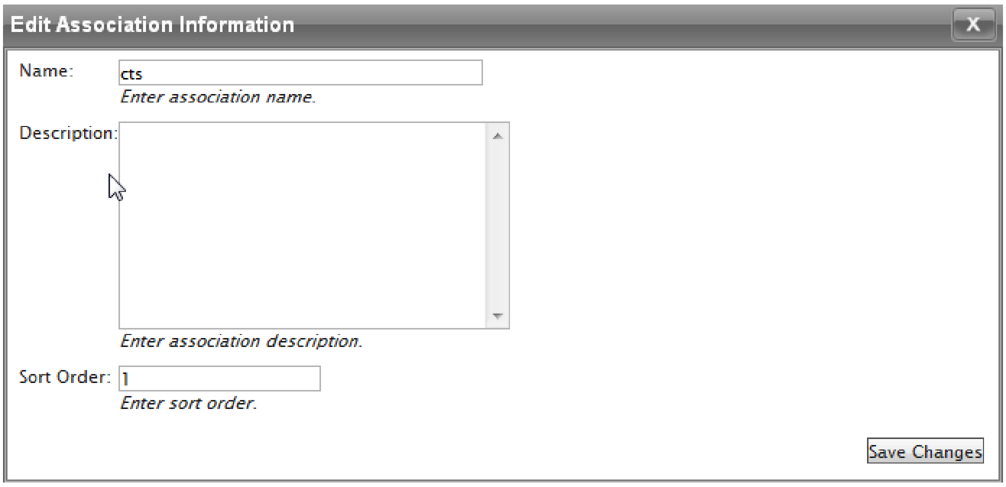
Do the following to add a product association:

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



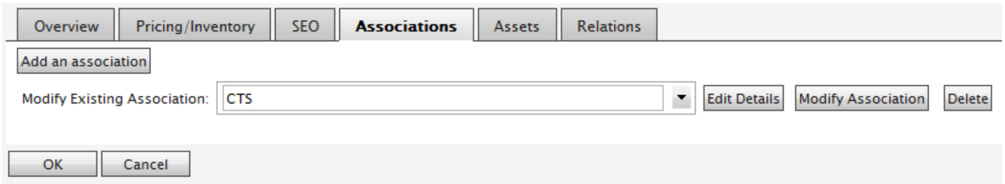
2. When the pop-up appears, enter information in the following fields:

- **Name** - name of the association. This name cannot have spaces (ex: Related Items would be entered as "Related_Items").
- **Description** - the description to detail what this association is.
- **Sort Order** - determines in what order this association is displayed in the associations drop-down list.

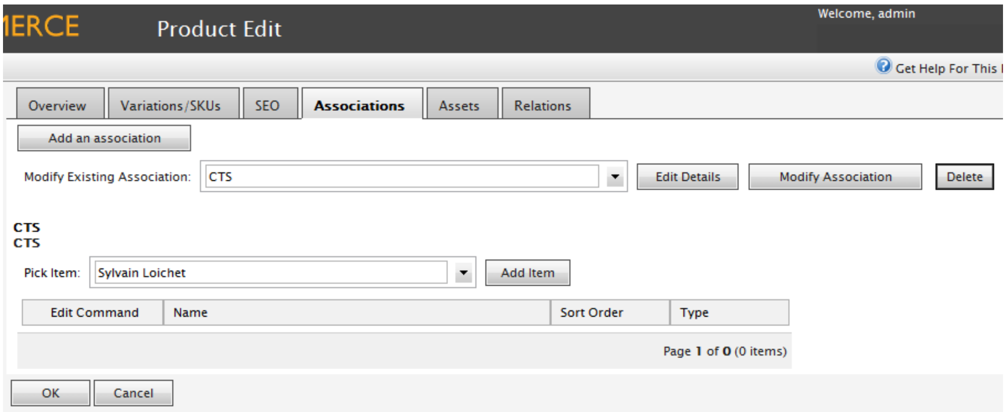


Once you're done, click on **Save Changes**.

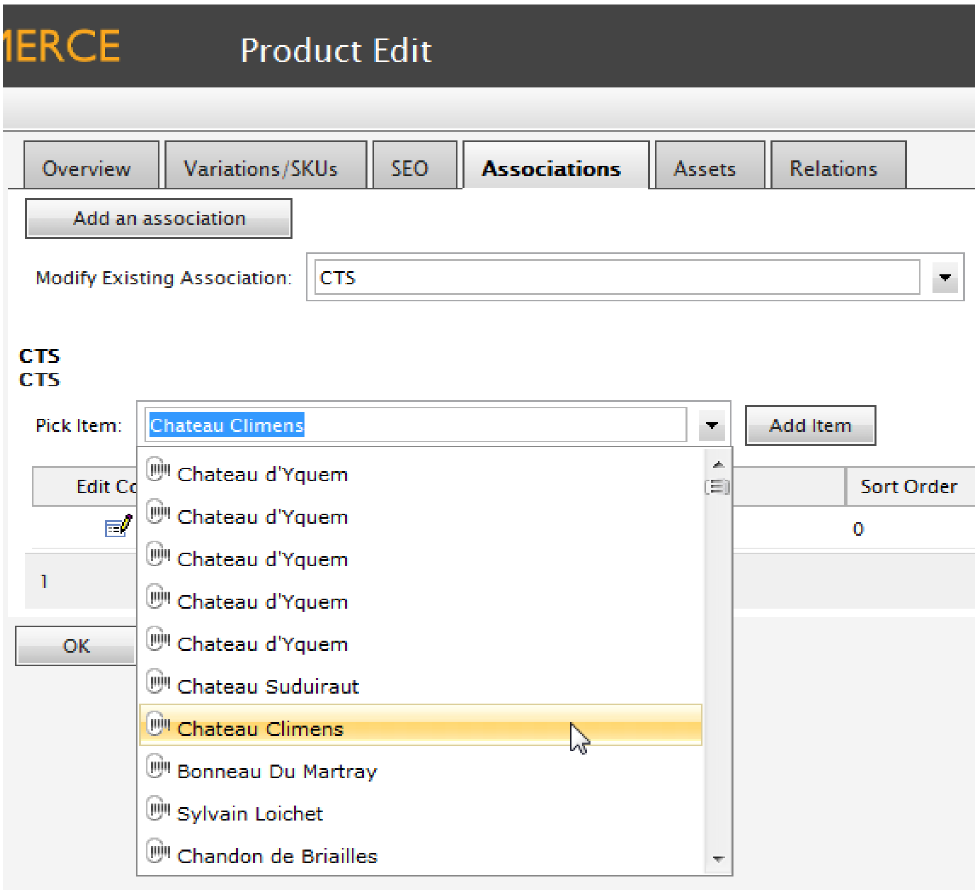
3. The new association will appear in the drop-down list.



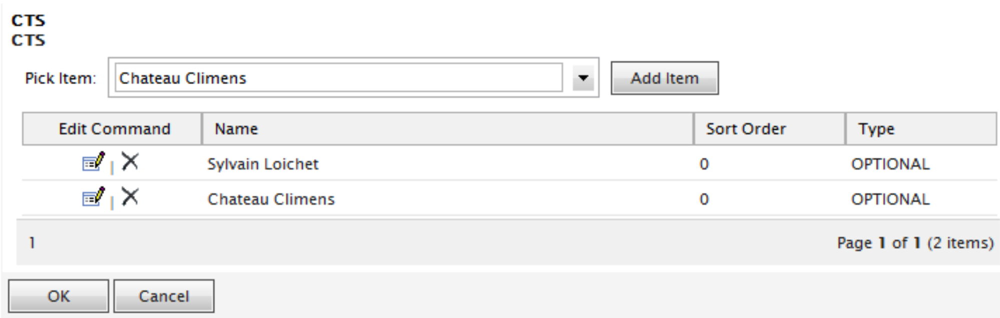
4. Next select the new association that you just created from the drop-down menu and click on **Edit Details**. You may also choose to **Modify Association** or **Delete** the association.



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



6. 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.



7. Once you have added all of the items you wish click **OK** to save the changes.

Assets for Catalog Items

Introduction

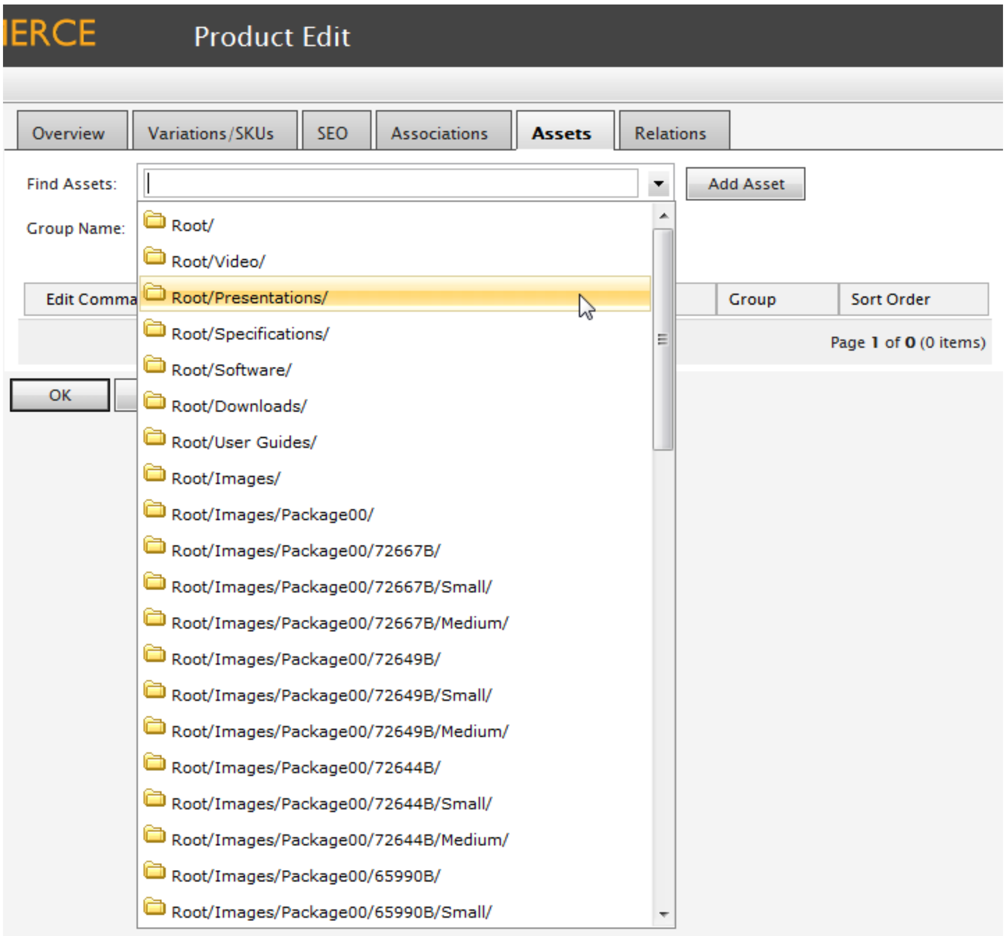
Assets are downloadable contents such as documents, links, videos, and images that can be linked to specific products. Assets are uploaded and managed in the *Asset Management system*. The **Assets** tab is available on all of the details pages through the levels of your catalog. By default assets are displayed on the front-end for Variations/SKUs, but any item of your catalog can have assets added to it. A developer can configure your templates to display assets and other details of any level of your catalog.

Adding an Asset to a Product

You can associate and link various assets you have previously uploaded to the *Asset Management system*.

Do the following to add an asset to a catalog item such as a product:

1. Under **Catalog Management**, open a catalog item for editing and go to the **Assets** tab.
2. Under **Find Assets**, select an item from the drop-down list and click **Add Asset**.

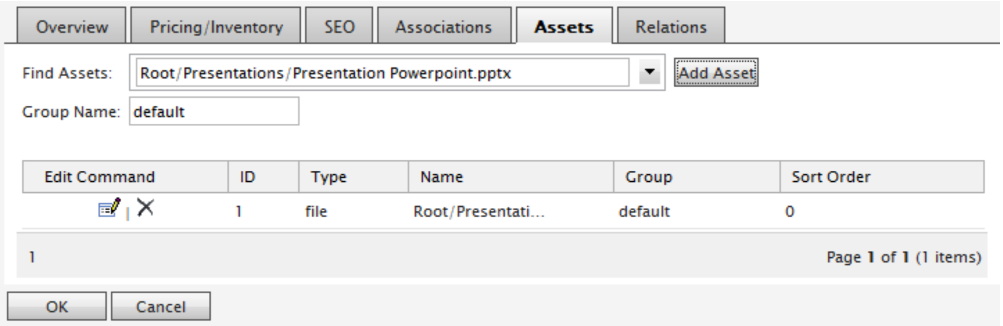


3. Enter a **Group Name**.

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.

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



5. 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

Relations for Catalog Items

Under the **Relations** tab the relations for a product will be displayed, and you can manage the categories a product is linked to. This is useful in order to get an overview of all the different categories (nodes) where a product will occur. This shows the full catalog path of the variation/SKU. Here the relations for a product will be displayed, and you can manage the categories a product is linked to. This is useful in order to get an overview of all the different categories (nodes) where a product will occur. A product can for instance appear in the "French Market" category, as well as under "Daily Specials" and "Mixed Cases".

Browse to a product and open it for editing. The relations for the product will be displayed under the **Relations** tab.

Using Meta Classes and Fields

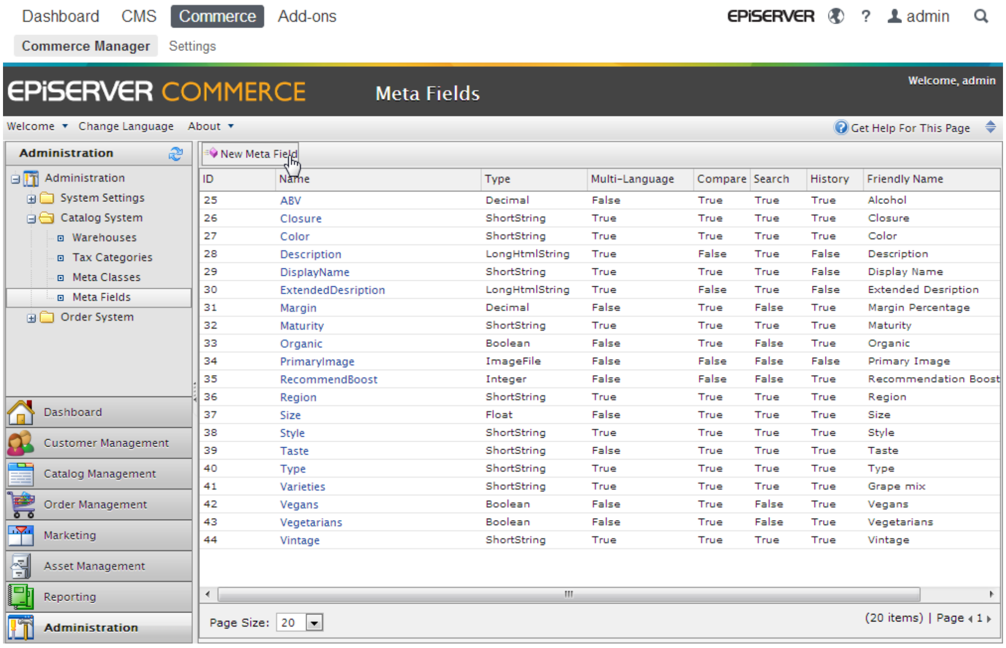
Introduction

The attributes, or the information about a particular product, can be customized using **meta fields and meta classes**. Meta fields and meta classes are for adding specific data about an item. For instance, if you create a meta class called "Wine" you will want to add meta fields that are characteristic for wine, for instance "color", "taste", "vintage" and "maturity".

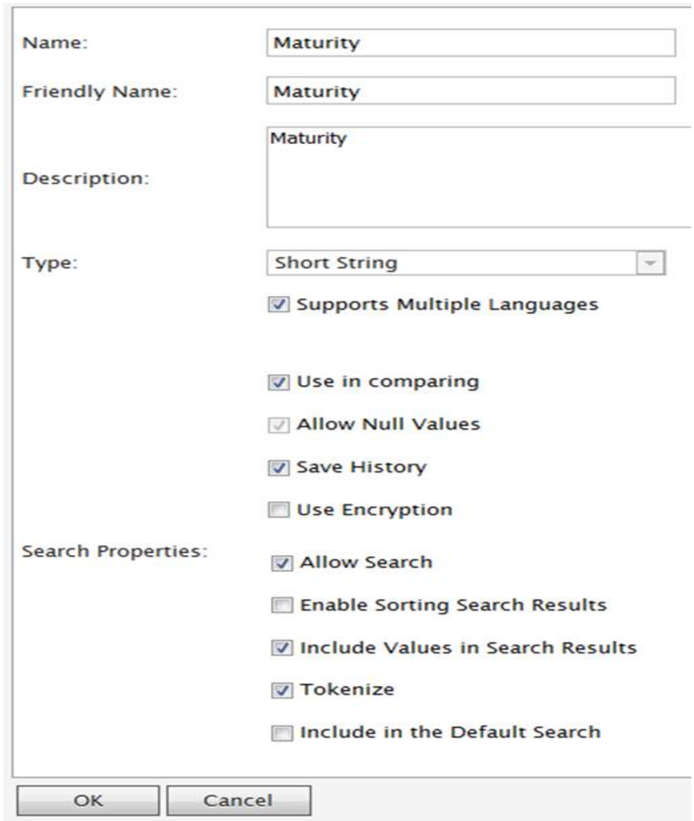
Refer also to related information in the sections *Catalog Meta Classes* and Fields and *Order Meta Classes and Fields*.

Adding Meta Fields to a Meta Class

1. Go to **Administration > Catalog System > Meta Fields**.
2. Click on **New Meta Field** to create a new meta field.



3. The **Meta Field Edit** page appears. There is a wide variety of parameters you can set for the meta field depending on the type you select.



Field	Description
Name	Enter a system name without spaces or special characters (e.g. "NumberMegapixels," without the quotes).
Friendly	Enter a user-friendly name seen by end-users on the back and front-end (e.g. "Number of

Name	Megapixels," without the quotes).
Description	Enter any additional information about the meta field.
Type	The drop-down menu shows the field types you can use for the meta field. The types available are: - datetime - decimal - float - money - Integer - Boolean - Date - Email - URL - Short String - Long String - Long Html String - String Dictionary - File - Image File - Dictionary
Search Properties	Depending on the data field type selected, you may have the option to set the search properties of the data field. The options are: - **Allow search** - allows for searching directly on this metafield. - **Enable Sorting Search Results** - search results will be sorted on this metafield. - **Include Values in Search Results** - when the search results is returned, the original value of this metafield will be included with the search results. - **Tokenize** - search is prepared for individual words in, for example a long product description property (word breaking). - **Include in the Default Search** - feature which tokenizes and combines metafield values for search from the front end site.

Adding Meta Field to a Catalog Meta Class

1. Go to **Administration > Catalog System > Meta Classes or Administration > Order System > Meta Classes**.
2. The meta field you created will appear in the list of meta fields. Select a meta class, checkmark the meta field you want to add to the meta class, and then click **OK**.

Catalog Batch Update

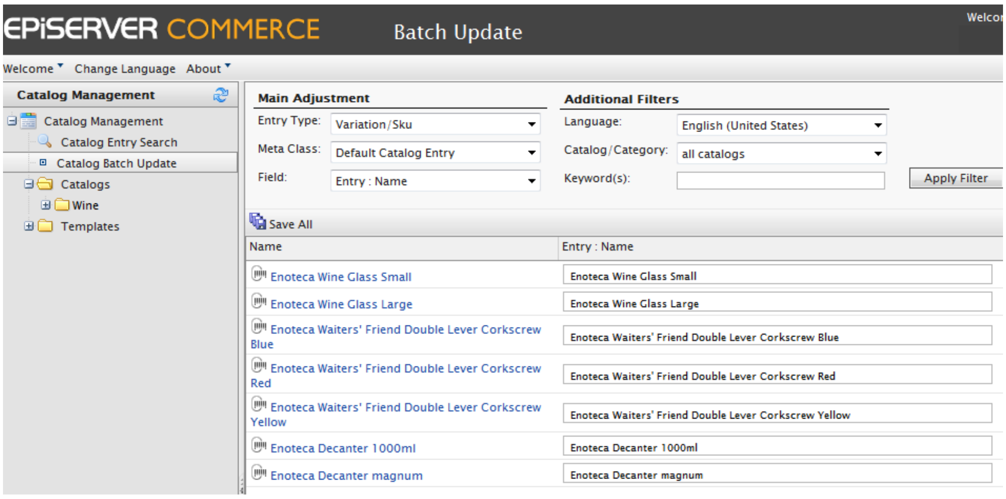
Introduction

As a catalog grows larger, you will want to utilize the batch update tool to update multiple catalog entries at once. The **Catalog Batch Update** option gives you the ability to quickly make multiple changes to your catalog without having to update each catalog entry individually. When searching for catalog entries to update, you can narrow down you results by using a set of **filters**.

Updating Multiple Catalog Entries

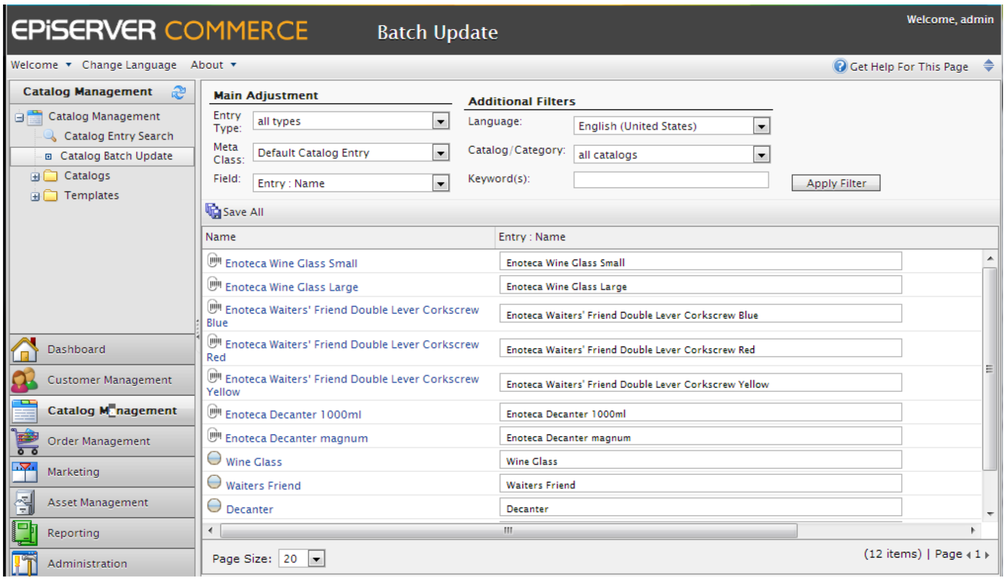
Do the following to update multiple catalog entries:

1. Go to **Catalog Management** > **Catalog Batch Update**. The **Batch Update** screen appears.



2. The **Main Adjustment** filters are divided by **Entry Type**, **Meta Class**, and **Field**. Entry Types in the drop down menu include **Product**, **Variation/Sku**, **Bundle**, **Package**, and **Dynamic Package**. The **Meta Class** and **Field** drop down menus depend on the **Meta Class** you selected, your selection will then populate the Field drop down selections.
3. To narrow down your results, you can use the additional filters: **Language**, **Catalog** and **Key-words**. If your entries are in more than one language and you want to edit a specific entry in another language, you would want to apply the Language filter. If you want to narrow the results to a specific catalog, use the Catalog filter to search for entries within that catalog. To narrow your search even further, enter in Keywords, such as "Wine Glass" (without the quotes).
4. Within your search results, you can click on a specific catalog entry and go directly to its edit page. Or by adjusting the **Field** drop-down menu, you can select which field you want to directly edit. For example, if you have a list of variation/skus, and you want to change the **display price** for all of them at once, you can change the **Field** drop-down menu to "Variation : Display Price." The right column will then change, allowing you to directly edit the display price for all the catalog entries at

once.



5. When you are satisfied with your changes, click on **Save All**.

Editing and Deleting Catalogs

Introduction

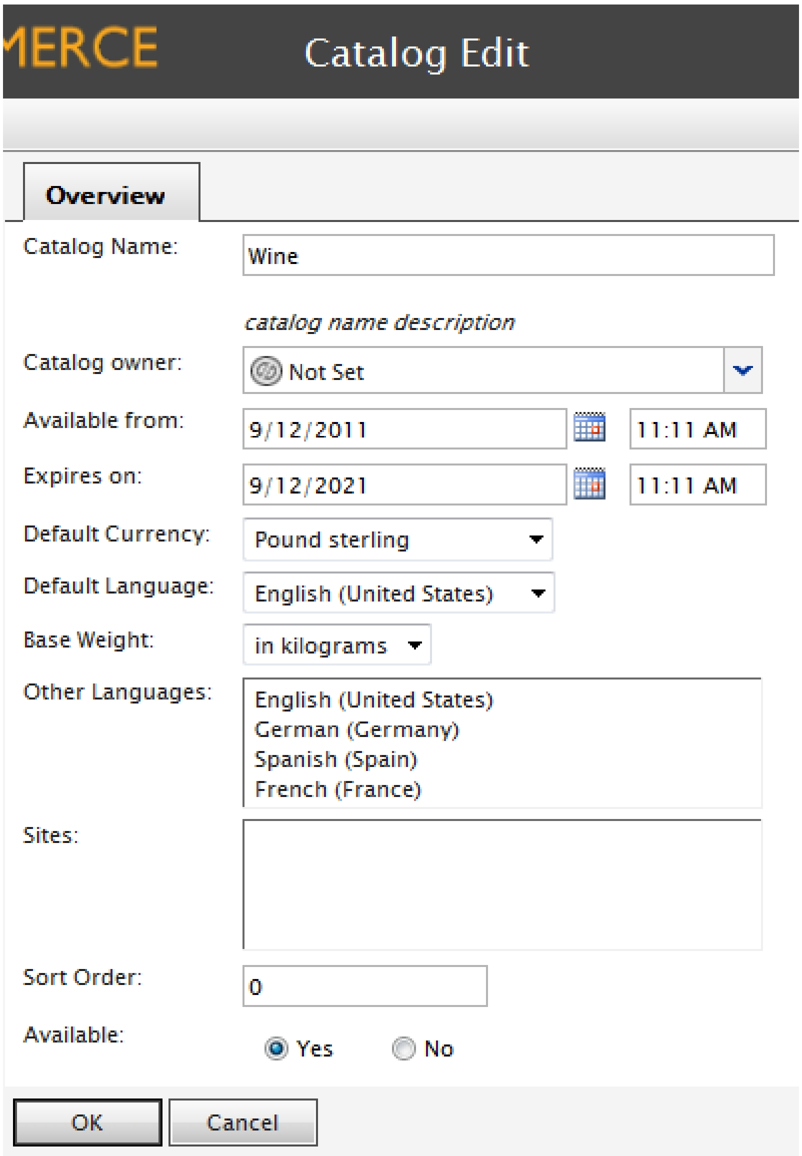
Catalogs can easily be **edited** after they have been created, as well as entirely **deleted** from the site.

Be aware that deleting a catalog may cause things to stop working on your site. Before deleting your catalog you may also wish to export it to save for future use.

Editing a Catalog

Do the following to edit a product catalog:

1. Click the edit icon to the left of the catalog you wish to edit.
2. You will be brought to the **Catalog Edit** page. Here you will see all of the catalog details.
3. Update the catalog information you want to change, for instance the name, currency or availability for the catalog.

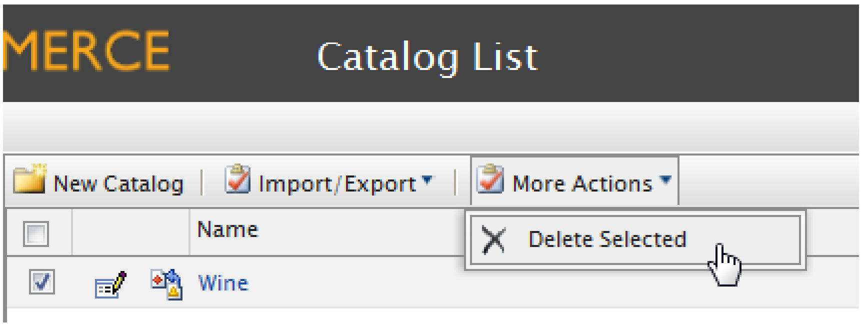


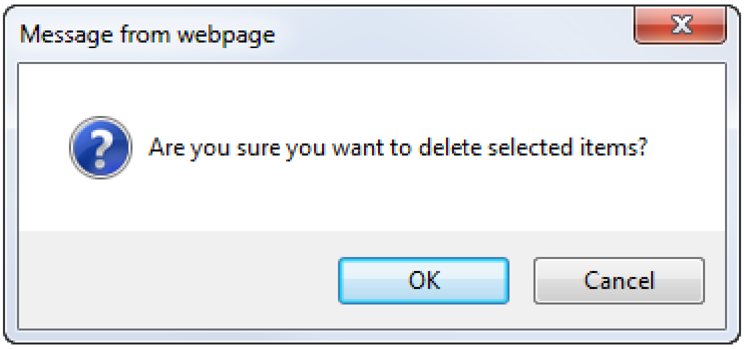
4. Click **OK** to save your changes.

Deleting a Catalog

Do the following to delete a product catalog:

1. At the **Catalog List** page, check the box next to the catalog you wish delete.
2. Select **More Actions** and then **Delete Selected**, located in the menu bar.
3. Select **OK** to confirm the deletion. The chosen catalog will be deleted from the list.





Cloning, Moving, Linking and Deleting

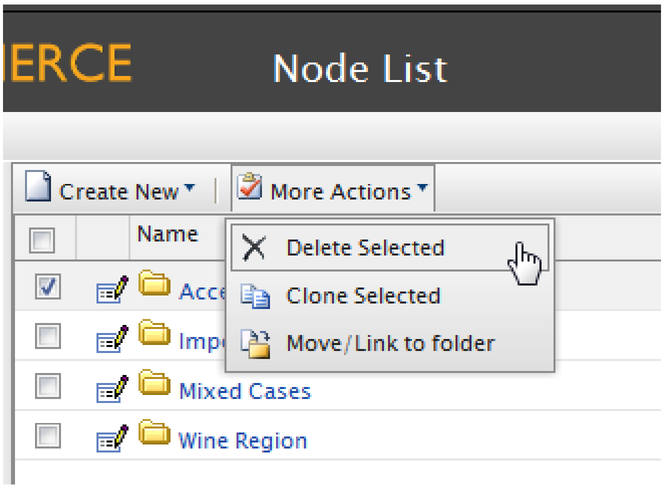
Introduction

Within your catalog (node) you may delete, clone, move, or link catalog entries or categories.

- **Cloning** allows you to replicate an existing entry perhaps as a start off for a second one. A duplicate catalog entry or category folder will be created with a unique ID. Once created you can edit the item to create a second similar item and/or place it in any location/hierarchy that you choose.
- **Moving** allows you to control the structure of your catalog after items are created. This feature allows you either to move an entry or category folder to a new location/hierarchy.
- **Linking** allows you to link an item to another location in your catalog hierarchy so that the item exists in two places and still acts as one item. For example, you can create a category folder called "Featured Products." You can then link catalog entries to this category folder without having to clone entries and clutter your catalog with duplicates.

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

All options are available in the **Node List** under **More Actions**, when selecting a **category** (node) under **Catalog Management**. The same procedures can also be applied to **catalog entries**, by expanding a catalog and selecting the desired catalog entries instead of categories.



Cloning a Category/Catalog Entry

Do the following to clone a category/catalog entry:

1. Expand the **Node List** under **Catalogs**.
2. Check the box next to the category folder you want to clone.
3. Select **More Actions** and then **Clone Selected** to clone the category.
4. The entry is successfully cloned and added to the **Node List**. You will notice that all of the details are exactly the same, with the exception of the ID.

Moving a Category/Catalog Entry

Do the following to move a category/catalog entry:

1. Expand the **Node List** under **Catalogs**.
2. Check the box next to the category you want to move.
3. Select **More Actions** and then **Move/Link to folder** to move the category.
4. Select the folder you want to move the item to.
5. Click **OK** to save.
6. The item will no longer be in your current node list. You can verify the move by navigating to your selected move location.

Linking a Category/Catalog Entry

Do the following to create links between categories/catalog entries:

1. Expand the **Node List** under **Catalogs**.
2. Checkmark an entry or category you want linked back.
3. Select **More Actions** and then **Move/Link to folder** to create the link.
4. Select **Link to folder** and select the link destination from the drop-down menu.
5. Click **OK** to create the link to that category under that directory..
6. Your item is now linked. Any changes made to the linked items will be reflected in both instances.

Deleting a Category/Catalog Entry

Do the following to delete a category/catalog entry:

1. Expand the **Node List** under **Catalogs**.
2. Check the box next to the category you want to delete.
3. Select **More Actions** and then **Delete Selected** to delete the category.

Order Management

Introduction

Order Management is a central part of the e-commerce system. Since the majority of orders will be created from the front-end site, the ordering process is usually automatic following an order management workflow, but in some cases orders need to be manually managed. The Order Management system provides shopping carts (baskets), order capture, order fulfillment, payment functions and item return or exchange support.

Meta Classes and Fields for Products

You can define your own **meta classes and meta fields** for both **products** and **orders** in Commerce Manager. For instance, if you create a meta class called "Wine" you will want to add meta fields that are characteristic for wine, for instance "color", "taste", "vintage" and "maturity".

When meta fields and classes have been created, they will be available for usage when working with the product catalog. Meta classes and fields for catalogs are defined in the **Catalog System** part of **System Administration**. For more information, refer to *Setting up Meta Classes and Fields*.

Working With Order Management

The work with orders includes the following tasks:

- *Browsing orders* for example to monitor order status and find specific orders
- *Creating orders* - different ways of creating orders, adding payment plans and split shipments.
- Managing *shopping carts* and turning them into orders.
- *Processing orders* - adding payments and preparing the shipment.
- *Managing shipments* - processing shipments and creating picklists for orders including returns.
- Managing *returns and exchanges* - processing returns and product exchanges.
- *Editing and deleting orders* - the cancellation and deletion of orders.

Refer to the *Shopping Workflow* section for a general description of the shopping procedure in EPiServer Commerce.

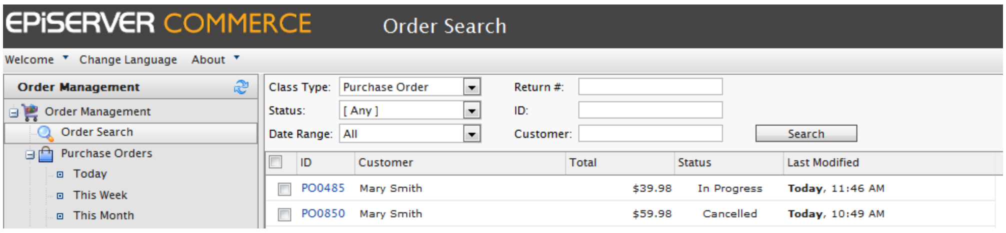
Browsing Orders

Introduction

The majority of your orders will be created on the front-end by customers in the online store, and you will most likely have a significant amount of orders in your system. In this section we will describe different ways of finding specific orders whenever you need to manage them manually.

Using Order Search to Find Existing Purchase Orders

Order Search allows you to find existing orders, giving you six different search filters to help refine your search results. You can click on the ID number of the order to view it.



Filter Name	Description
Class Type	Select "Purchase Orders" on the drop-down list. Otherwise, if you want to search for a specific shopping cart or payment plan, select those.
Status	You can filter results by their statuses. For example, if you want to find only completed purchase orders, select from the drop-down list "Completed". Available status options are: • OnHold • PartiallyShipped • InProgress • Completed

	• Cancelled • AwaitingExchange
Date Range	You can select from date ranges from "today," "last week," or "this month."
Return #	Enter the return number of a purchase order if a return was created for that particular order.
ID	You can specify the order ID. Orders created out of the box with EPiServer Commerce are typically numbered as PO####.
Customer	Enter a customer name and the search results will return only orders filtered by the specified name.

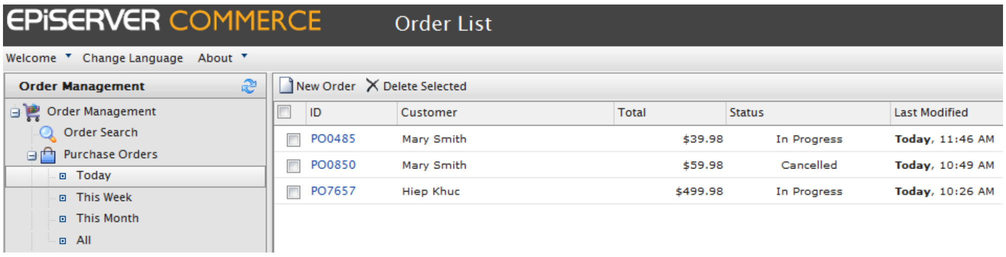
Click on **Search** to being your search query. The desired results appear below. The results are broken down by five column fields:

- ID
- Customer (name)
- Total (cost of order)
- Status
- Modified (date)

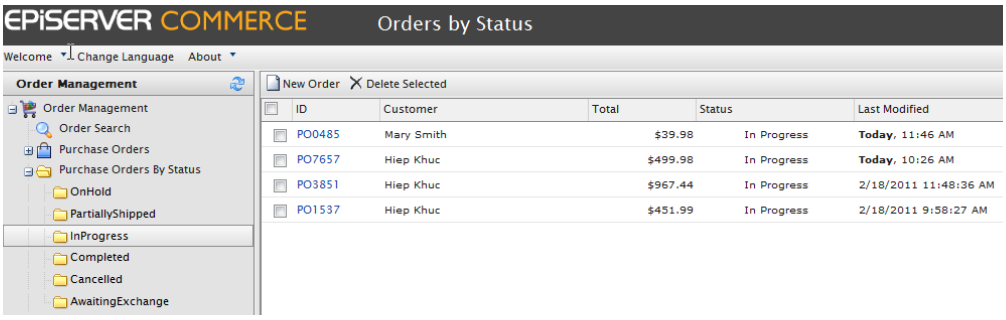
You can sort results by **ID**, **Customer**, **Total**, or **Status**.

Viewing Purchase Orders by Date or Status

In the left navigation menu, you can click on the nodes below **Purchase Orders** and **Purchase Orders by Status**. For example, clicking on **Purchase Orders > Today** will show the orders created today only on the right window.

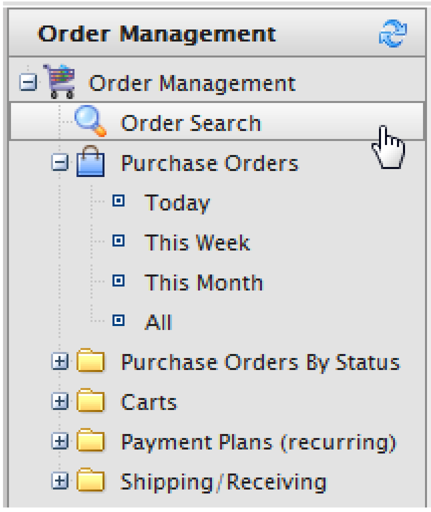


Moreover, you can view orders within the **Order List by status**. For example, click on **Purchase Orders by Status > InProgress** to view orders with that status.



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

Click on **Order Management** and then **Order Search**



Creating Orders

Introduction

Most orders are created by customers from the front-end part of the website, but in some cases it might be necessary to create orders manually from within Commerce Manager. You can create orders either from within **Order Management**, or directly for a **Contact** in *Customer Management*. The order management option is the most common way to create an order.

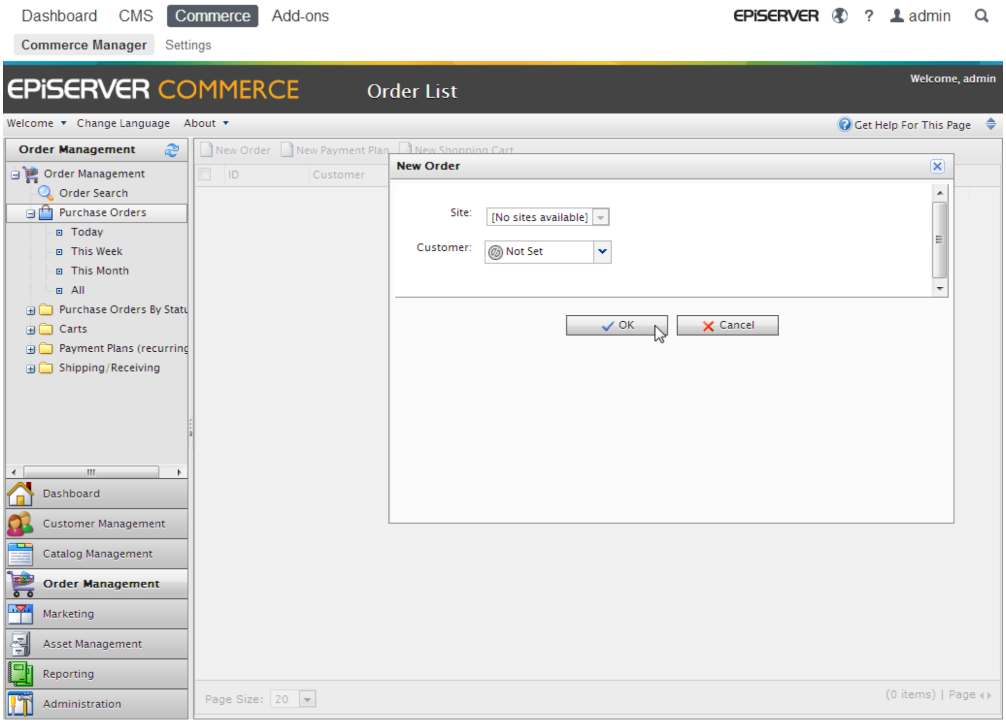
Compared to the customer management option, it is faster and has additional alternatives for orders such as **Purchase Order** versus **Payment Plan**. Using the Customer Management system takes a little longer but allows you to double-check a customer's information before beginning an order.

When an order has been created in this step it appear in the **Purchase Orders** list with the order status "In Progress".

Creating an Order from Order List

1. Go to **Order Management** > **Purchase Orders**.

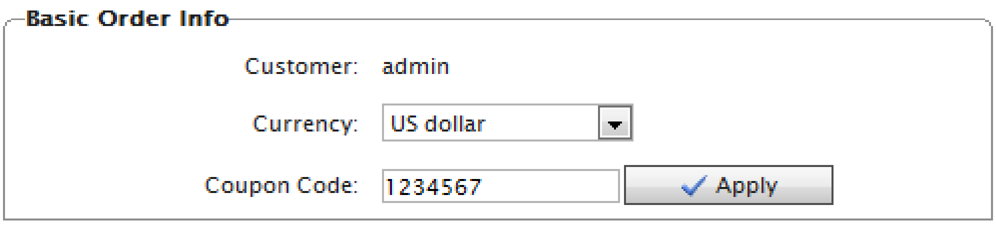
2. Click on **New Order**. A pop-up appears, allowing you to select the site and contact to apply the new order to. Use the drop-downs to make your selections. For Customer, if your customer is not listed select **More** to search for them.



3. Click **OK** once your selections are made .

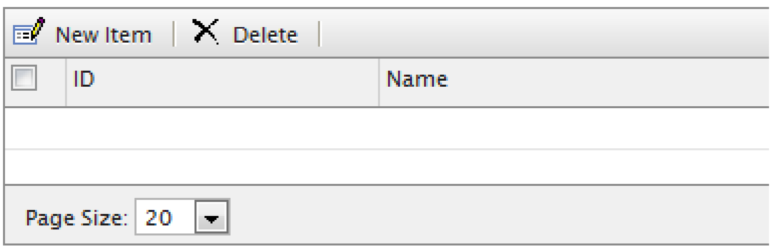
Filling Out the Purchase Order

1. Enter basic order information.

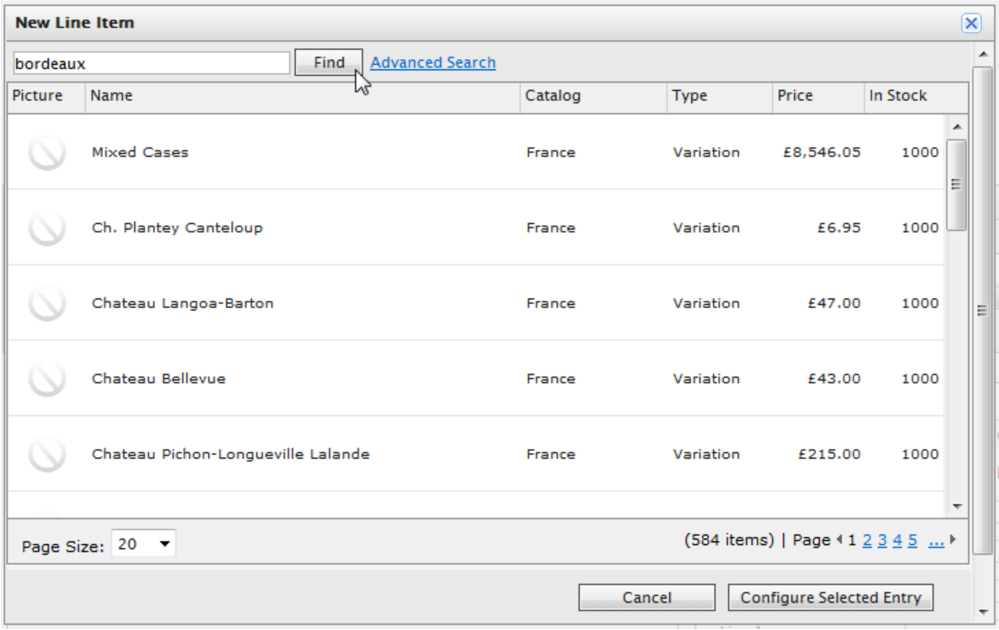


Field	Description
Customer	This is the name of the contact.
Currency	Select from the drop-down list the currency to associate with the Purchase Order.
Coupon	Coupon codes created with a promotions can be applied here to associate with the Purchase Order. Click Apply once code is entered.

2. Click **New Item** to select the items in the site catalog to associate with the Purchase Order. A pop-up windows appears allowing you select items from a site catalog.

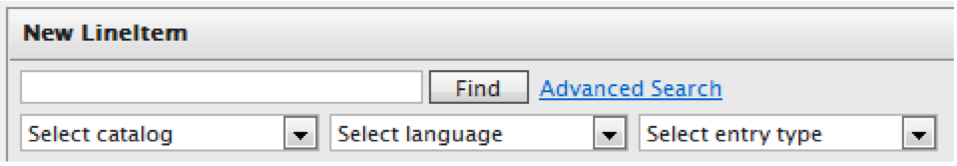


3. Search for items by entering your search terms into the search field and click **Find**. You can sort your search results alphabetically by clicking the **Name** column. Select an item from the list and click on **Configure Selected Entry**.



Advanced Search

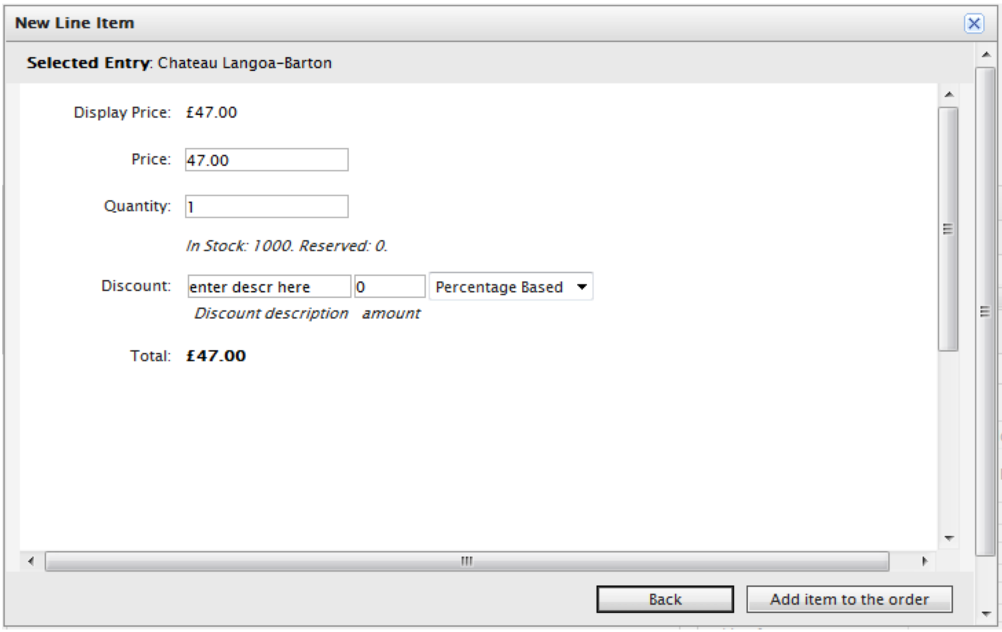
You can apply three filters to refine your item search results.



Field	Description
Select catalog	Select which specific catalog to search
Select language	Select a specific language (such as German) for items described in German
Select entry type	Select a specific type of entry, such as variation/SKU or bundle

Configuring the Selected Entry

1. Before you add the item to the order, you can configure the actual price, the quantity, and apply a percentage or discount based discount.

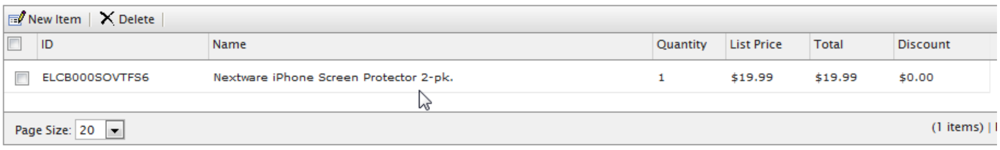


Required Fields

- Price
- Quantity

Field	Description
Display Price	This is the price seen on the public website. This is set at the catalog entry level.
Price	This is the actual cost of the item that will be charged when the item is added to the order.
Quantity	Set how many of the item to add to the order.
Discount	You can apply a discount to the item, either Value or Percentage based.
Total	The total is automatically calculated, factoring in the actual price, quantity, and any discounts applied.

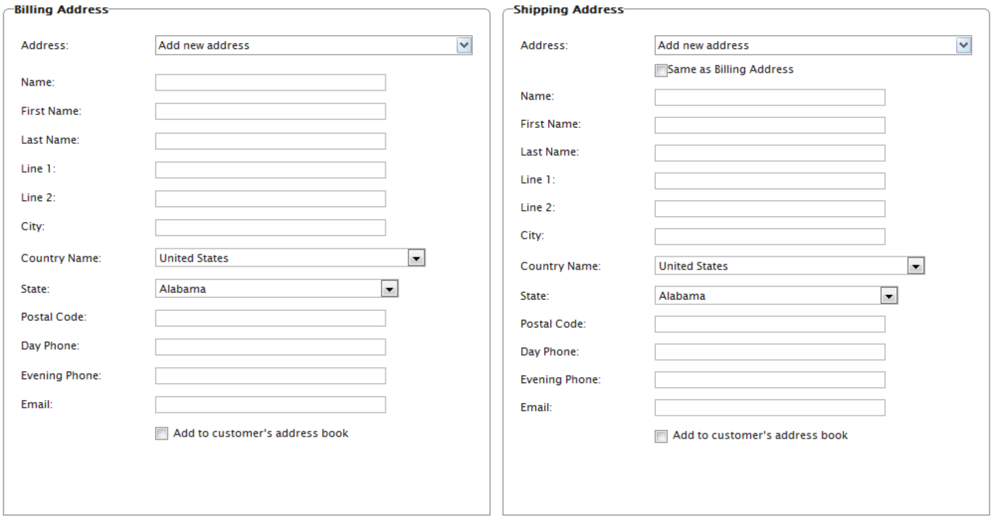
2. Once the item is configured, click **Add item to the order**. The item will appear on the Purchase Order form.



Completing the Rest of the Purchase Order Form

1. Enter a Billing and a Shipping Address.

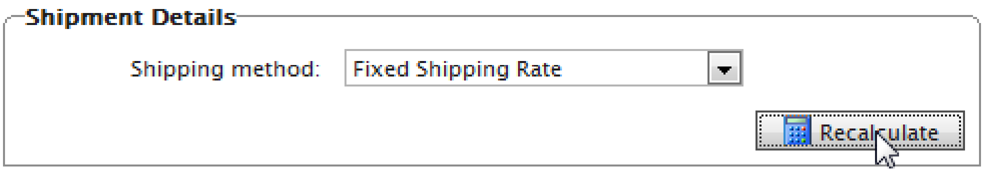
   When entering the Shipping or Billing Address, you can select an existing address associated with the contact, if any.

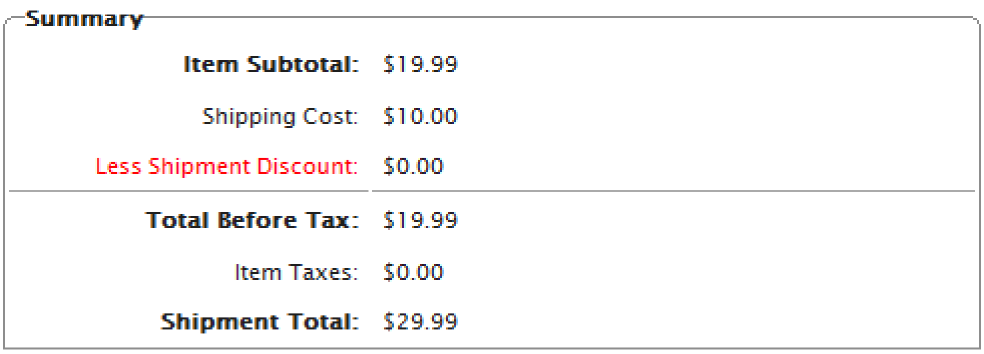


Checkmark **Add to customer's address book** if you want to save the address to the contact.

If the Shipping Address is the same as the Billing Address, click on **Same as Billing Address**. The Shipping Address form is auto-populated with the information entered in the Billing Address form.

2. Select the kind of shipping to use for the order under **Shipment Details**. Select from the drop-down the shipping methods (add link) available.
3. Click on **Recalculate** to generate the cost summary.



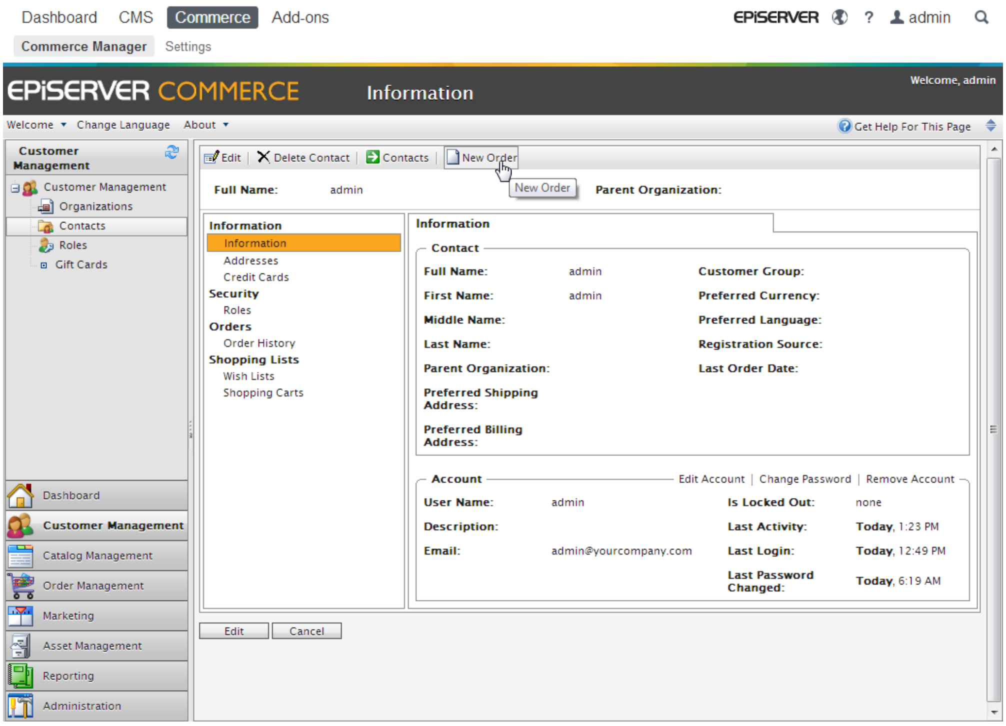


4. Click **OK** to save the order.

Creating an Order Within a Contact

1. Go to **Customer Management > Contacts** and create or click on an existing contact. The contact details appear.

2. Click on **New Order**.



3. The **New Order** pop-up window appears. Select the site to apply the order to and click **OK**.
4. The **Purchase Order New form** appears, allowing users to enter basic information about the order.
5. Follow the steps under **Creating an Order From Order List** above to complete order.

Processing Orders

Introduction

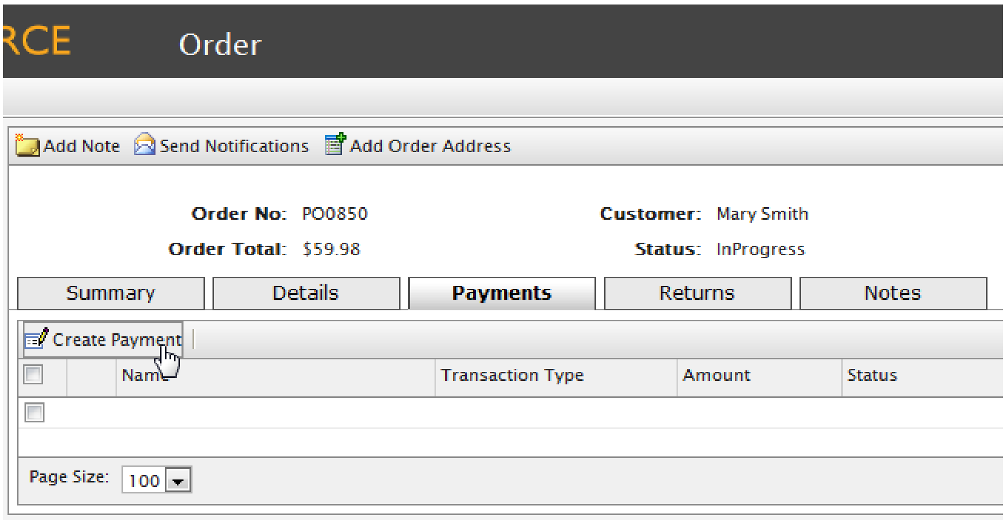
The order **processing or fulfilling**, includes adding a **payment** and releasing the order for **shipping**. These steps are needed in order for the order to be completed and ready for shipping to the customer. When the payment is cleared the order will be released for packing and shipping. Depending on how your system is set up, this process may be automatically handled by the system. In these examples we will describe how the procedure is done manually.

When an order has been processed and relesed for shipping in this step it will have the status "In Progress" in the order list, and it will appear in the **Released for Shipping** list under **Shipping/Receiving**.

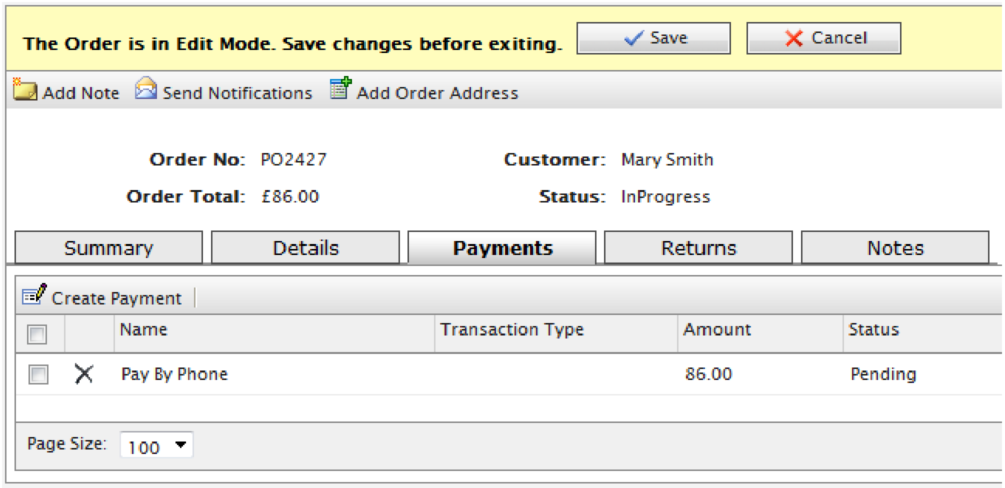
Submitting Payment and Releasing to Shipping

Do the following to add a payment and release an order to shipping:

1. Go to the **Order Management** and open the order you wish to add a payment for and process.
2. Add a payment to the order.

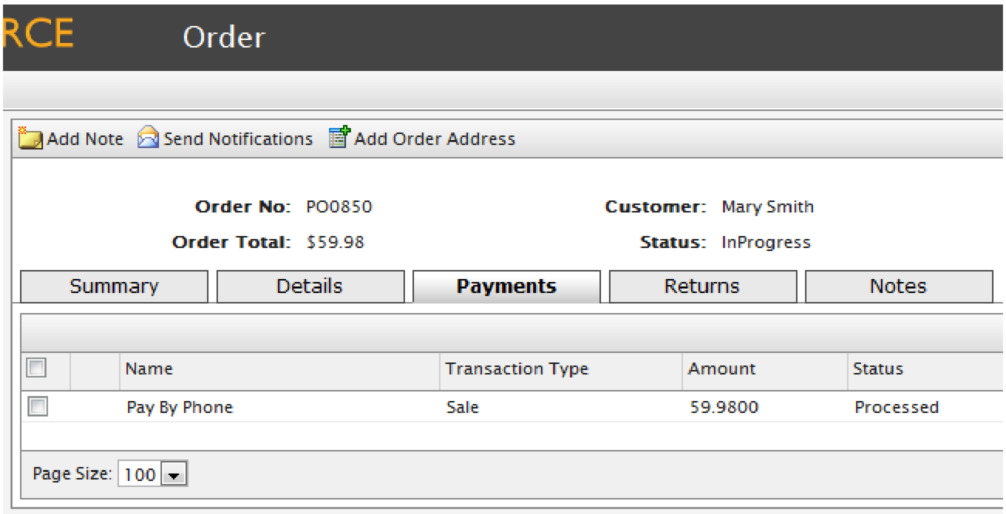


3. Enter the amount of the payment. The **Amount** field auto-populates the value of the total order, including shipping costs. However, you can change the value of the payment (useful for splitting payments between two or more payment methods at the request of the customer).
4. Select the **Payment Method** from the drop-down list.
5. Click **OK**. The order goes into **Edit Mode**.

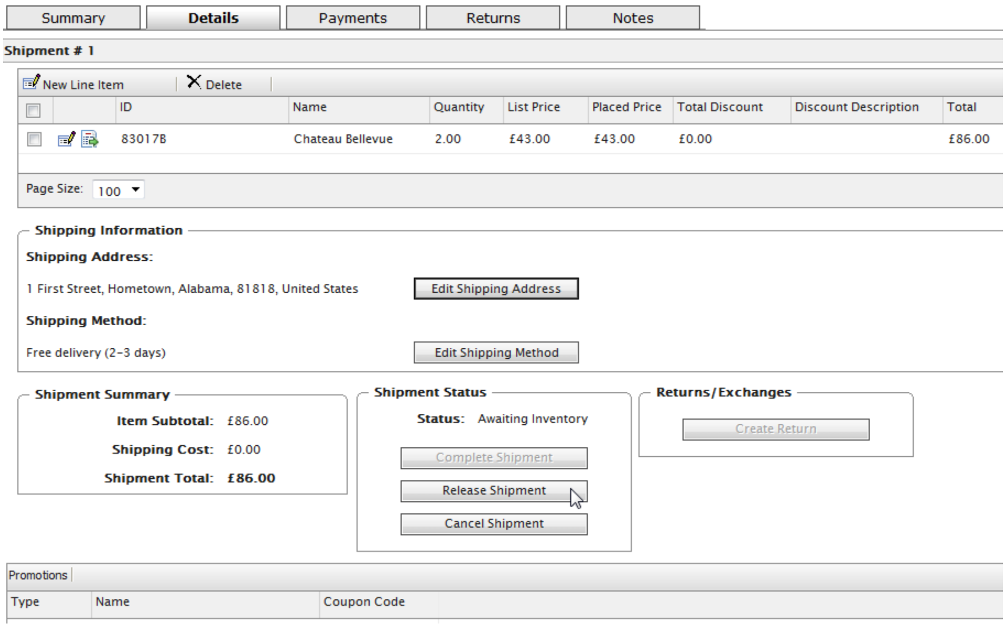


Note: When in Edit Mode, you can add more payments to the order. However, once you click **Save**, you finalize the payment. This means that you cannot add or delete any further payments.

6. Once you have finished adding one or more payments, click **Save** to exit Edit Mode and save your changes. The payment gets automatically processed for the amount specified.



7. Check the **Details** tab. You will see that the **Shipment Status** has changed to "Awaiting Inventory." Once the availability of the item has been determined, click on **Release Shipment** to release the order to your shipping department.



8. By clicking on **Release shipment**, the status changes to "Released." For further processing of the order, your shipping department will go to **Order Management > Shipment**.

If you click **Cancel shipment**, you will end up canceling the entire order. (At the moment, there is no way to undo the cancellation, so you must be careful.)

Refer to *Splitting Shipments* for more information on how to split shipments. Refer to *Setting up Payment Plans* for information on how to work with recurring payment plans for orders.

Splitting Shipments

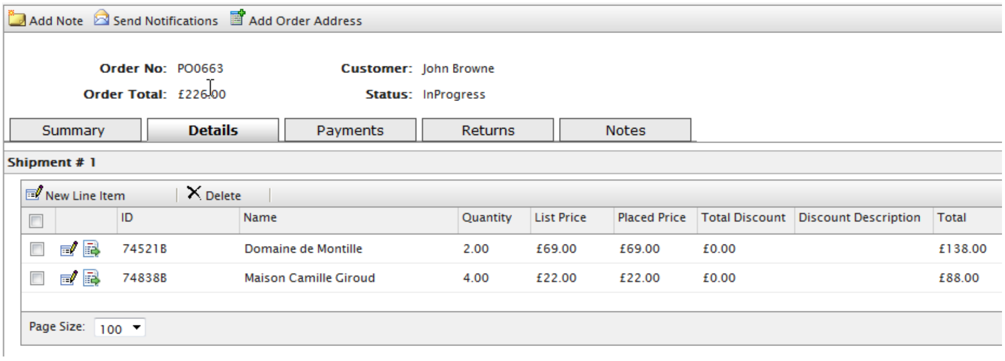
Introduction

If there are two or more items within an order, they can be **split** into separate shipments. This is useful for expediting items within the order that are immediately ready for shipment, while other items have extra shipping lead time. It can be useful for shipping multiple heavy items to the same customer, back-ordered items, or a large volume of items for ease of delivery and pickup. A shipment can be split as many times, up to the number of items in a single order. Note that the order must have **two or more items** in order to be able to split shipments.

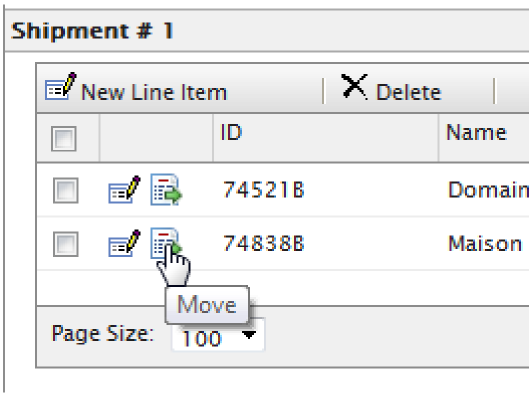
Splitting a Shipment for an Order

Do the following to split a shipment for an order:

1. In **Order Management**, go to an *existing purchase order* or *create a new one*.
2. Go to the **Details** tab in the order form. Look for **Shipment # 1**.

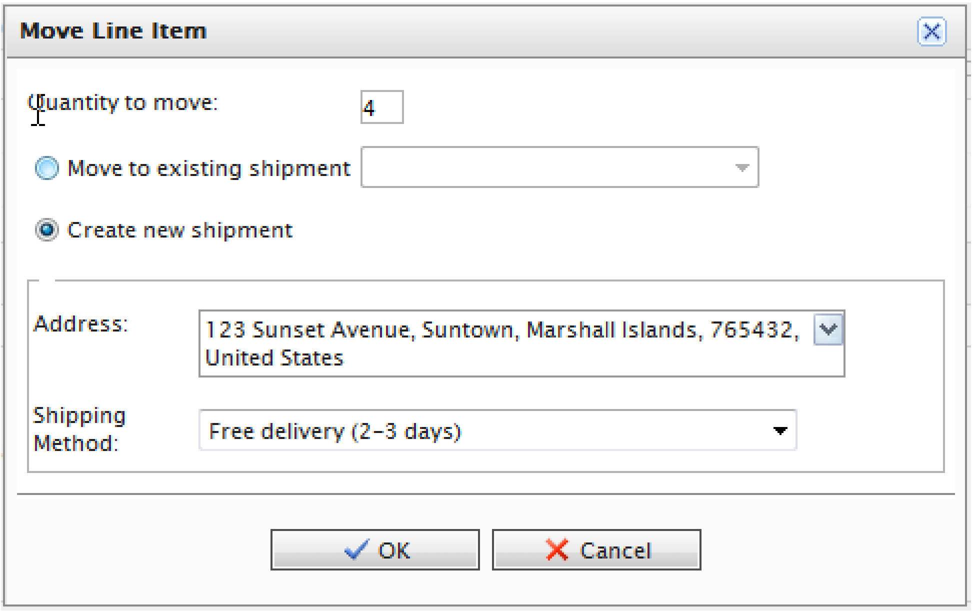


3. Select the item you want to move by clicking on the **Move** icon.

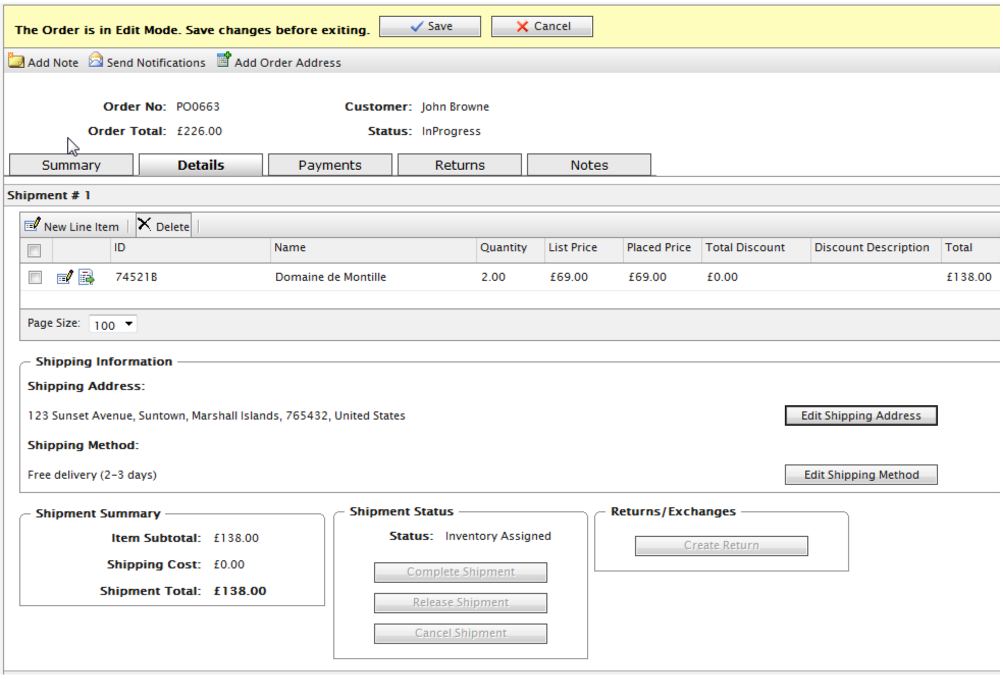


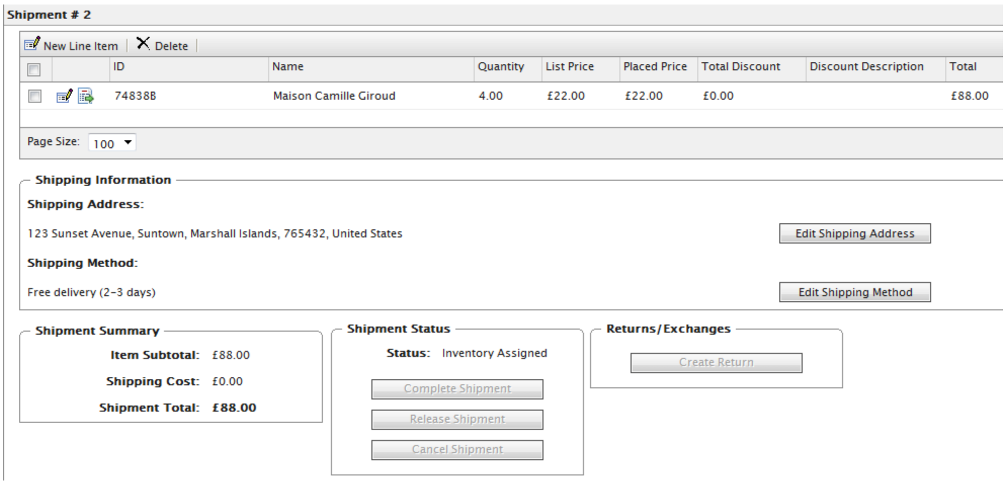
4. The pop-up appears, which allows you to choose to move the item(s) to an existing shipment or create a new shipment. You can also select the quantity of the item to move. Each new shipment within the order can have its own separate shipping address and shipping method. Select a shipping address and shipping method from their respective drop-down lists. Click **OK** to save your

changes.



5. After splitting the shipments, the order form goes into Edit Mode. The **Details** page shows the new shipment, which can be processed completely separate from one another, but tied to a single purchase order.





6. Click **Save** to save your changes.

Setting up Payment Plans

Introduction

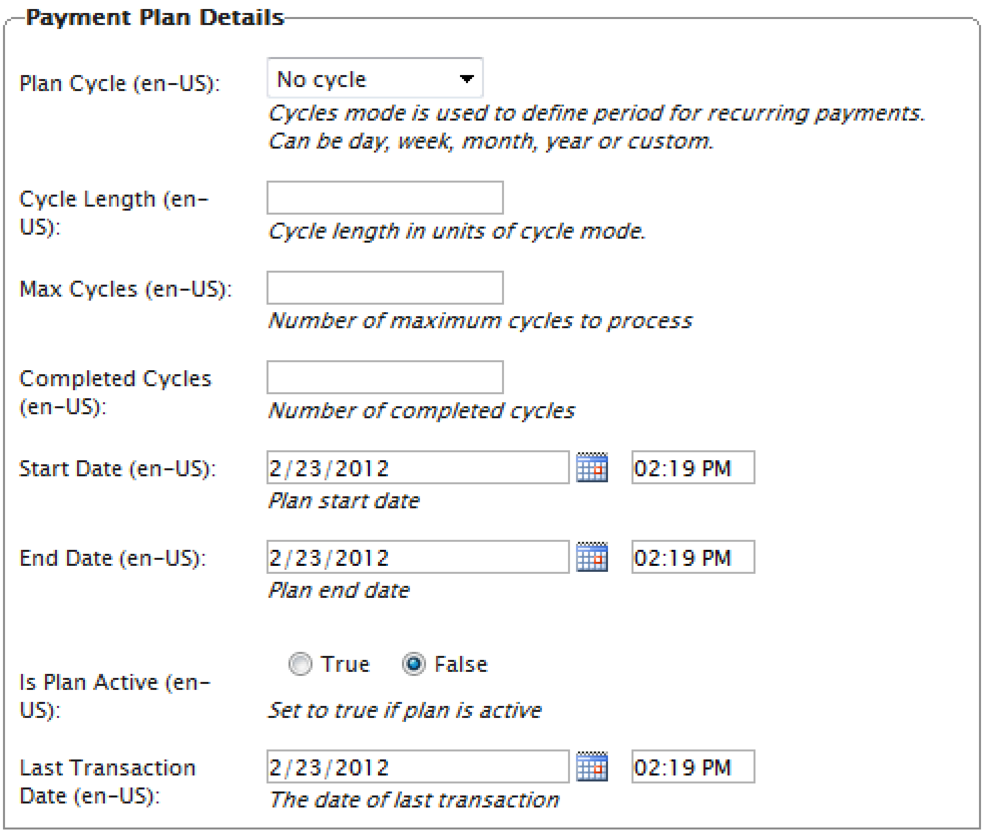
Payment plans work exactly like orders, except that you use them spread out the payments over time that a customer has to make. This allows flexibility in how you sell your products, as well as how a customer pays for them. You can use this for large and complicated orders, orders that need to be shipped in sequence, or just expensive items.

Payment plans can be setup by the Customer Service Representative (CSR) to generate recurring payments. An example recurring payment would be for magazine or grocery subscriptions. Payment plans are handled in the background by a scheduled Quartz job which should be configured by your IT team based on your business needs.

Creating a Payment Plan

1. Go to **Order Management** > **Payment Plans (recurring)**. You will open up the **Payment Plans List**. To create a new payment plan, click on **New Payment Plan**.
2. Select a customer contact to attach the payment plan to.
3. The **Payment Plan New** page appears. Complete the form as you would when creating a new order.

4. Under **Payment Plan Details**, you will set the cycles and parameters of the payment plan.



5. Once the payment plan is configured, click **OK**.

Field	Description
Plan Cycle (Cycle Mode)	You can choose from the following plan cycles, which determine how often the customer is charged. - No Cycle: No recurring payment is created. The customer is charged once when the initial purchase order is created. - Daily Cycle: recurring payment happens daily from start date. - Weekly Cycle: recurring payment happens weekly from start date. - Monthly Cycle: recurring payment happens monthly from start date. - Custom1/Custom2: these are placeholders for developers to create custom cycles within the Mediachase.Commerce.Orders.PaymentPlanCycle class.
Cycle Length	Entering a value of 1 or higher determines the unit of time for the Plan Cycle. For example, if the Plan Cycle is set to "Daily," and the Cycle Length is "3," then a transaction occurs every three days. If the Plan Cycle is set to "Monthly" and the Cycle Length is "1," then a transaction occurs once every month. If "2," every two months, etc.
Max Cycles	Determines the maximum number of cycles to run for this payment plan. For example, if the Max Cycles is set to "2," then the maximum number of transactions cycles is two and then the payment plan stops. Set the Max Cycles to "0" if you wish to run the payment plan indefinitely.

Field	Description
Completed Cycles	This tallies the number of completed cycles so far after the payment plan was created. When initially creating the payment plan, set this field to "0".
Start Date	Set the start date and time to determine when the payment plan should begin (beginning recurring transactions).
End Date	Set the end date and time when the payment plan should end (ending recurring transactions).
Is Plan Active	Set "True" to enable the payment plan. Set "False" to create the payment plan but keep it inactive.
Last Transaction Date	Logs the last transaction date. The date and time already in those two fields when first creating the payment plan should be kept as is.

Payment Plan Order Detail Page Explained

The payment plan begins once the first purchase order is generated. The purchase order can be created manually (by clicking on Create First Purchase Order) or automatically by the payment plans quartz job.

After creating a new payment plan, a new **Order** page appears. This is slightly altered from the original Order detail page that appears after creating a new order. The changes include:

- Inability to manage shipments (i.e. release shipments for further processing)
- An Orders tab that shows a history of processed purchase orders from this payment plan
- A "Create First Purchase Order" button that a CSR can manually click on to create the first purchase order related to this payment plan. The button disappears after creating the first purchase order manually or when the payment plan quartz job runs and generates the first purchase order. Once that first purchase is generated, the payment plan goes into effect.
- The purchase order number that is generated includes the parent ID of the payment plan. For example, if the payment plan parent ID is 35, the subsequent purchase orders are numbered as "PO35XXX."
- When a payment is added to a payment plan, the customer is not charged. The customer is charged once the purchase order is generated for the first time (and through subsequent purchase orders). The payment plan simply collects the payment information until converted to a purchase order.

Editing and Canceling a Payment Plan

1. To edit an existing payment plan, go to **Order Management** > **Payment Plans (Recurring)** or **Today/This Week/This Month/All**. Click on the payment plan ID number to open the payment plans order details page and make edits.
2. To cancel a payment plan, when editing a payment plan, click on the **Summary** tab and then click on **Cancel Payment Plan**.

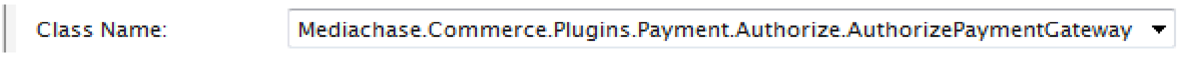
Creating a Recurring Payment Plan Using Authorize.Net

Out of the box, EPiServer Commerce supports **Authorize.net** as a recurring payment plan gateway.

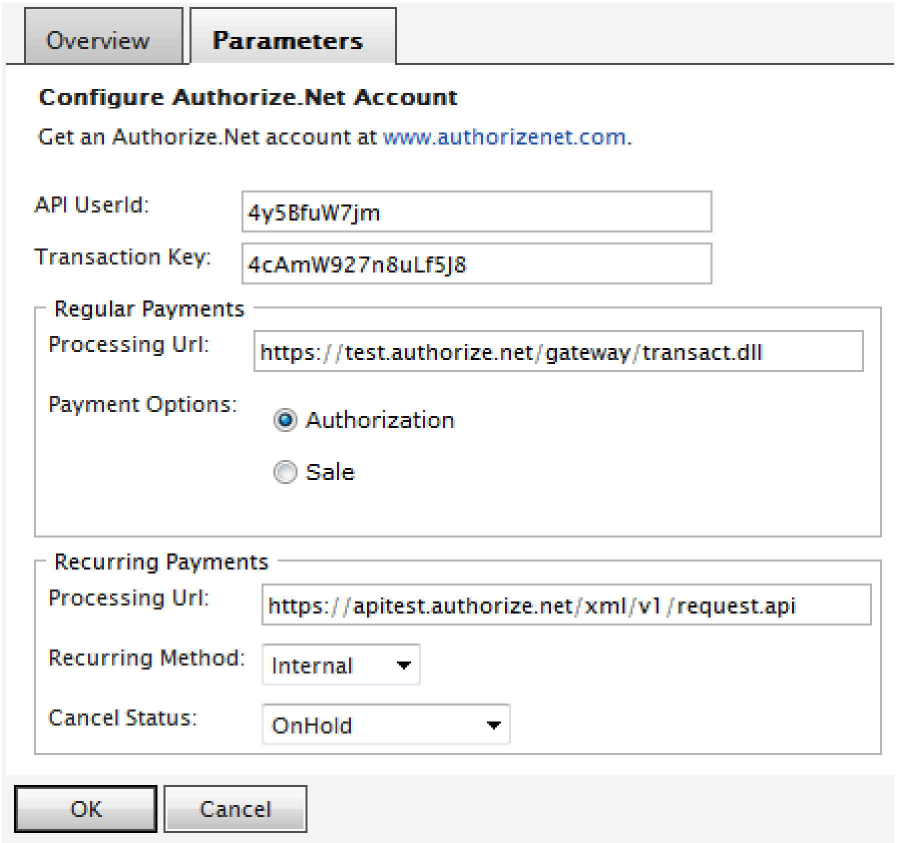
For more information on how to setup payment methods, refer to the *Payment Gateways* section.

1. Go to **Administration** > **Order System** > **Payments** > **(Language)** and create a new payment method or click on an existing payment method (such as "Pay by Credit Card").

2. When setting up the parameters of the payment method, select this class name:



3. Select "Yes" for **Supports Recurring**.
4. Click **OK**.
5. Click on the name of the payment method again and click on the **Parameters** tab.
6. Configure your Authorize.net account for both regular payments and recurring payments.



Editing, Canceling and Deleting Orders

Introduction

Orders can be edited after they have been created, which is useful when you need to update for instance the items for the order or the shipping information. Orders can also be deleted if needed. Both of these tasks are done from **Order Management**.

When an order is **canceled** it will still be visible in the order list but the status will change to "Canceled". When an order is **deleted** it will be completely removed from the order list.

Editing an Order

Do the following to edit an order:

1. Go to **Order Management**.
2. In the order list, select the order to edit.
3. Edit the order changing any desired fields under **Summary**, **Details**, **Payments**, **Returns** and

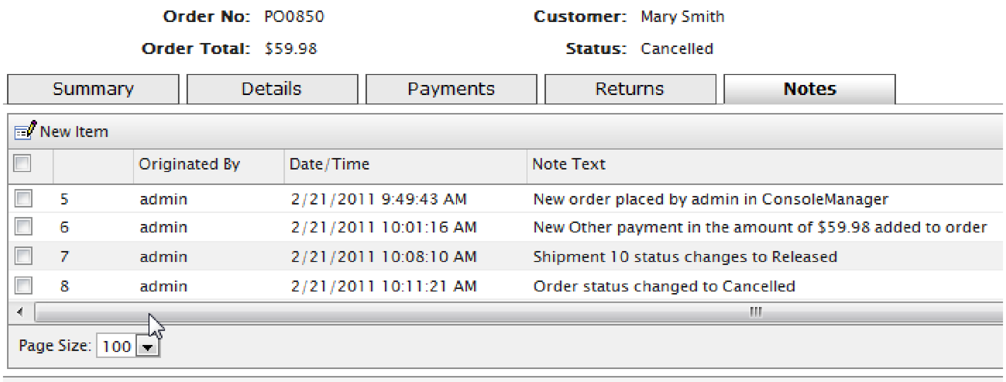
Notes.

4. When done, save the order by clicking **Save**.

Canceling an Order

Do the following to cancel an order:

1. Go to **Order Management**.
2. In the order list, select the order to cancel.
3. Under the **Summary** tab, click on **Cancel Order**. This will completely cancel the order. The status of the order changes to "Canceled" but it will remain in the order list for viewing.
4. The cancellation of the order will be logged under the **Notes** tab.



Deleting an Order

Do the following to completely delete an order:

1. Go to **Order Management**.
2. In the order list, select the order(s) to delete.
3. Click **OK** to confirm the deletion.

Shipping and Receiving

Introduction

Shipping and Receiving is split into two areas: **shipments** and **returns**. Shipments control both items released for shipping and "pick lists", or items that have been packed and are prepared for shipping/ready to be picked up. "Returns" are incoming items that have been return by customers for some reason, for instance faulty items that need to be replaced by exchanges. Returns are processed in a similar way as outgoing shipments.

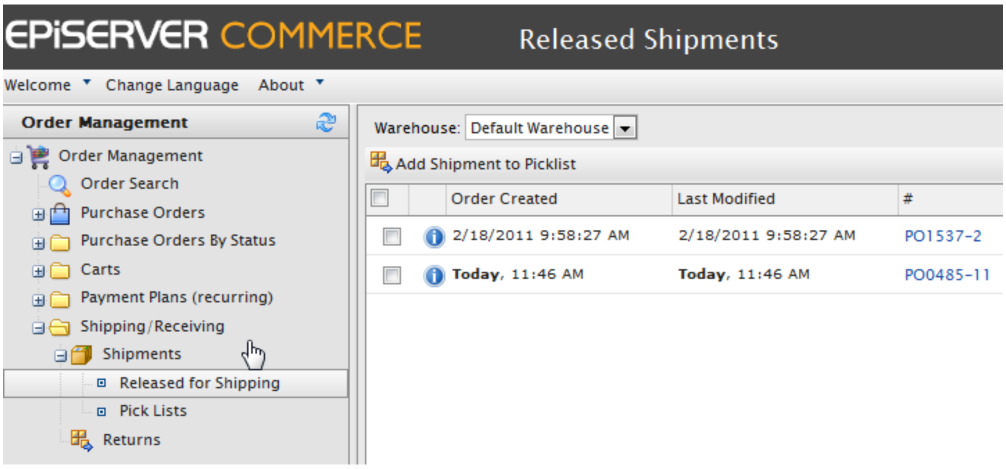
The final parts in completing the order processing includes these tasks:

- *Creating picklists* for picking up the physical items in the warehouse.
- *Completing the shipment* by preparing the physical package to be shipped.

Shipments and returns can be viewed and monitored as described in the following sections.

Viewing Shipments

The **Shipments** view contains information as described below.



Order Created

This column specifies when an order was created. This is useful, for example, if you want to ship orders by date and time.

Last Modified

If any changes were made to an order, a date stamp for its last modification will be displayed here.

Number #

This column is for the individual IDs assigned to each order. The first number is the unique tracking number we described under Purchase Orders. The second number is the unique tracking number assigned to the order for shipping purposes.

Customer

The full name of the customer as it appears on the package. This is useful, for example, if you want to ship orders all together to one customer.

Shipping Method

Specifies the shipping method used by each order. Depending on how many methods of shipping you have specified in the administration area, a different shipping method can show up in this column.

Address

The Address that the package is being shipped to.

Warehouse

A warehouse is (most likely) a physical location where you store your goods before delivery. You can select from any of the warehouses you have put into your system. Remember to select the correct one when attempting to check for shipments. The **Default Warehouse** can be changed to any name you desire. This can be changed in the *System Administration* section of the Commerce Manager. If you have only digital products, the default warehouse should be more than enough.

Viewing Received Items

Items that have been returned are managed as incoming packages and can be tracked under **Returns** under **Shipments** in the **Shipping/Receiving** area of **Order Management**.

Creating Picklists

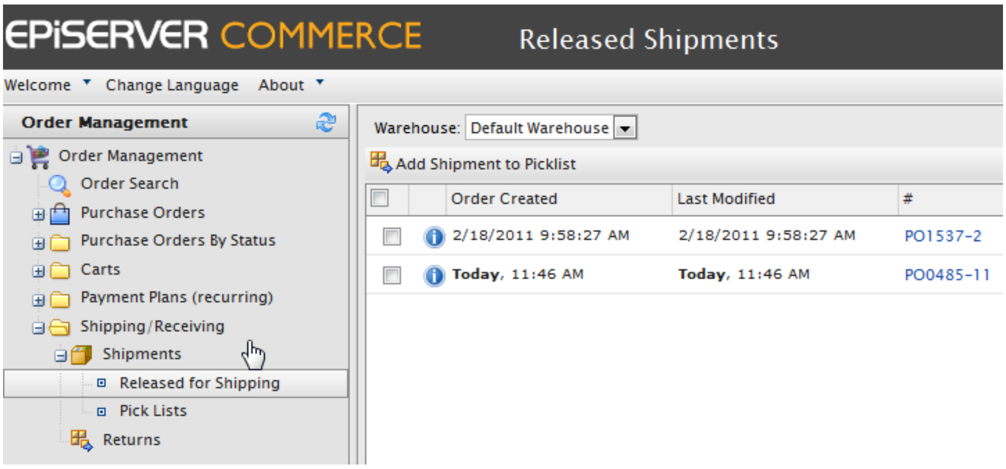
Introduction

After you have created an order and processed the order, its status is now "Released for Shipping." Adding an order to an existing **picklist** or creating a new one is an important part of moving an order in the workflow. Without this, orders cannot be completed nor shipped and this is one of the last steps to completing a purchase order. The shipment will be added to a picklist, and the warehouse will be selected where the physical item will be packed and shipped from.

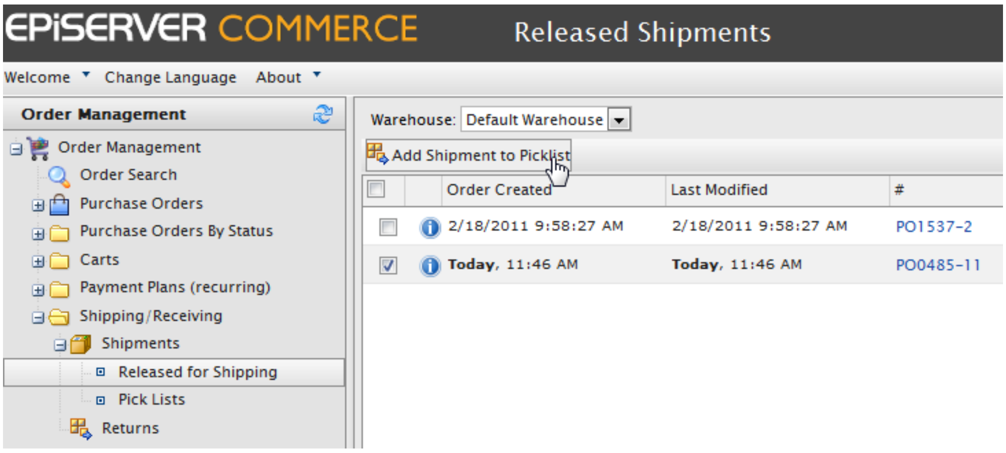
When an order has been added to a picklist in this step it will have the status "In Progress" in the order list. It will disappear from the **Release for Shipping** list and appear in the **Picklist** listing under **Shipping/Receiving**.

Creating Picklists and Adding Shipments

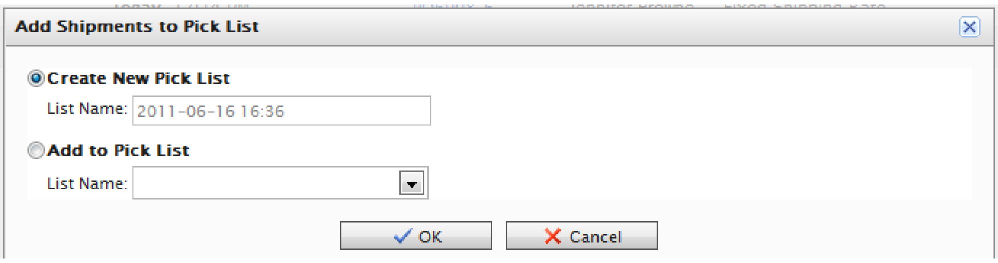
1. Go to **Order Management > Shipping/Receiving > Shipments > Released for Shipping**. This shows the **Released Shipments** screen.



2. Select a **Warehouse** from the drop-down list to determine where the item ship be packed and shipped from.
3. Checkmark which orders you want to add to the Picklist and click **Add Shipment to Picklist**.



4. The **Add Shipments to Pick List** pop-up appears. You can choose to create a **New Pick List** (by default, the **List Name** shows the date and time the Pick List was generated) or add the chosen shipment(s) to an existing Pick List you can select from the List Name drop-down list.



5. Click **OK** to save your changes.

Note that it is currently not possible to change the picklist name, default is date and time.

Completing Shipments

Introduction

This is the final area for an order where you prepare the actual physical shipment by assigning tracking information, preparing packing slips and "sending the package out of the door". Once this has been done, the **order is completed**. This also means that the order becomes available for creating **returns** if needed, since returns can only be created for completed orders.

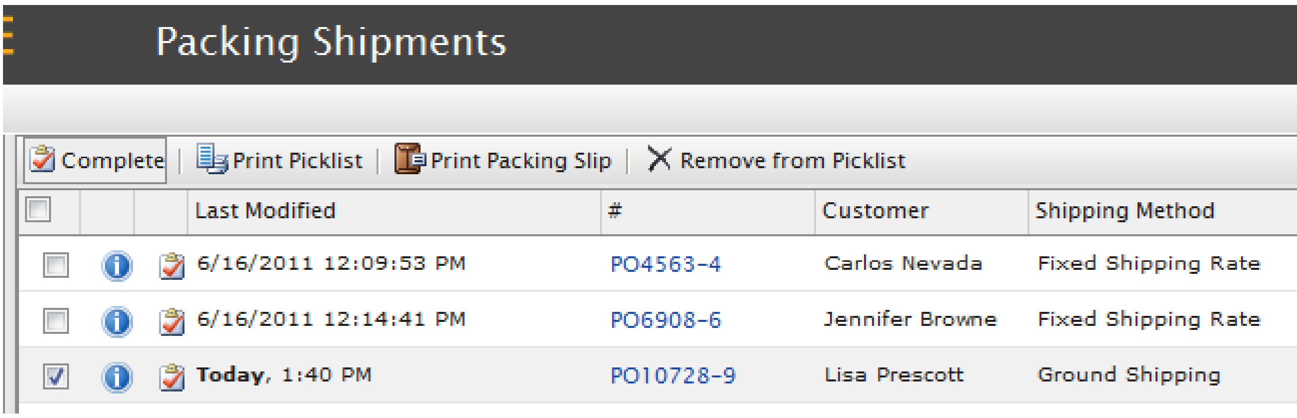
When an order has been completed this step it will have the status "Completed" in the order list and will disappear from the **Picklist** listed under **Shipping/Receiving**. The picklist will still remain in the list even if there are no packing shipments remaining.

Completing a Shipment

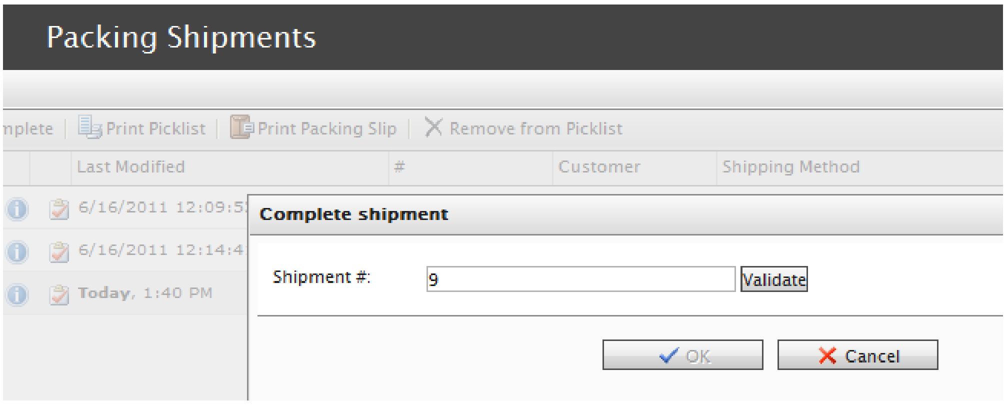
There are two ways to complete a shipment which are described in the following.

Method 1

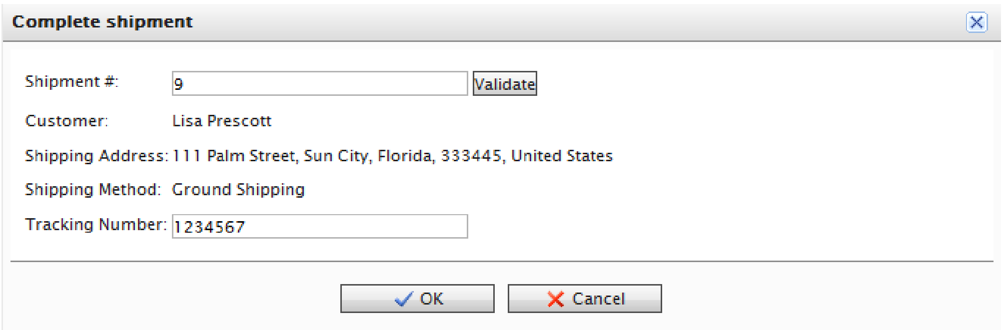
1. Select the box next to the shipment and then click **Complete**:



2. The **Complete shipment** pop-up appears. The default shipment number is based on the number after the purchase order number. For example, in the image above, the PO number for the selected order is "PO10728-9". The **last number after the dash** is the number you want to enter into the text field, in this case it is "9".



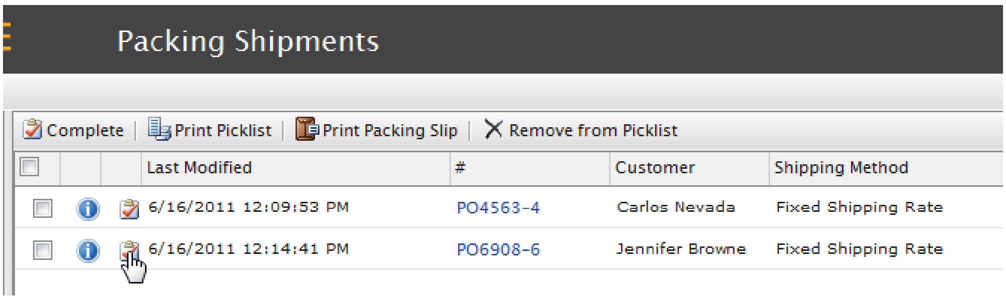
3. Click **Validate**. Once validated, you will see the customer name, shipping address, shipping method, and a field to enter in the tracking number provided by the shipping provider. Enter in a tracking number and click **OK**. The shipment is sent out and completed. The purchase order status will change to "Completed."



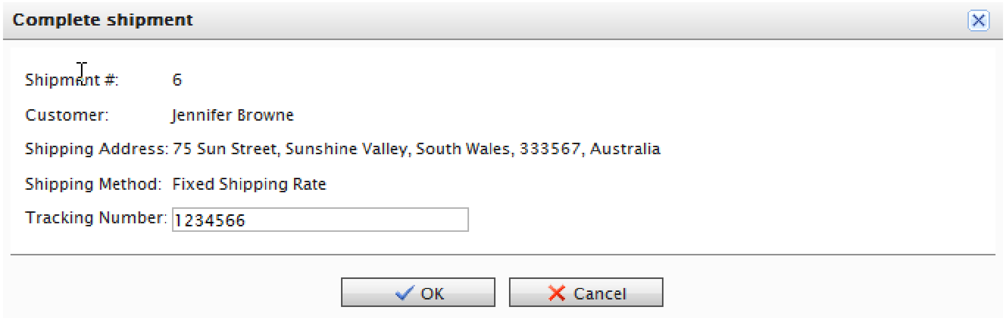
Currently, the Complete shipment pop-up is rendered over the purchase order number. So to reference the shipment number without closing the pop-up, you can move and drag the pop-up so you can see the PO number by hovering your mouse cursor over the Complete shipment title bar.

Method 2

1. To complete a shipment, click on the complete shipment icon highlighted in the image below:



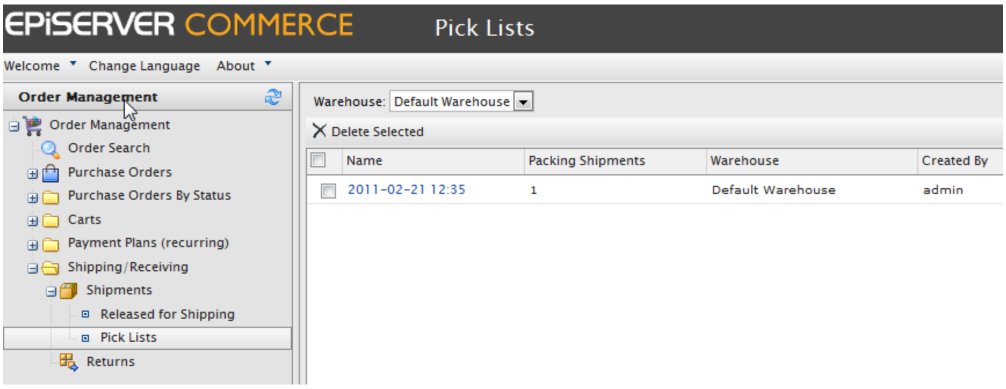
2. The **Complete shipment** pop-up appears. The shipment # is already validated with the last number of the PO number.



3. Enter a tracking number provided by the shipping provider and then click **OK** to complete the shipment and complete the order.

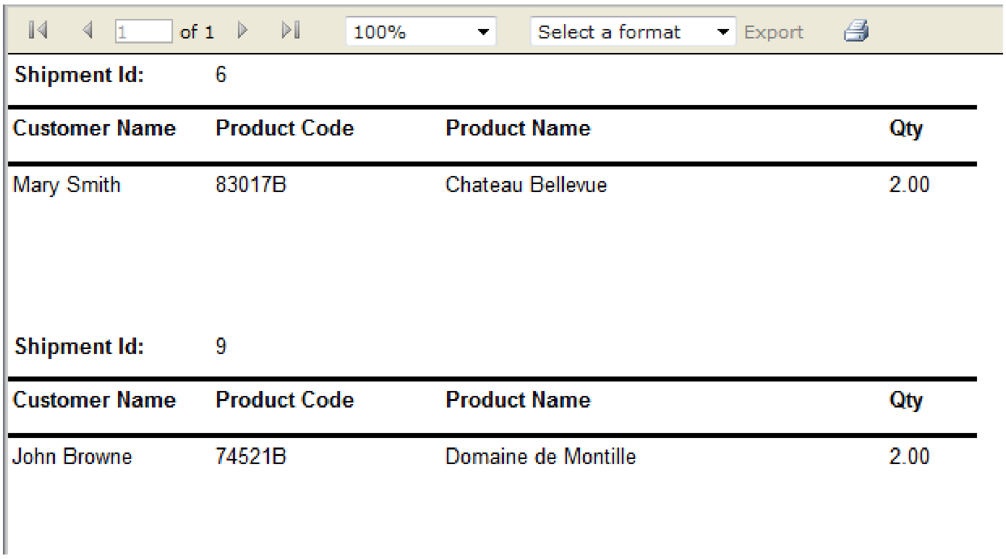
Printing Picklists and Printing Packing Slips

1. Go to **Order Management > Pick Lists**. You can see existing Pick lists; you can filter the view by choosing which warehouse the pick list was generated in.



You can also sort existing pick lists by **Name**, **Packing Shipments**, **Warehouse**, and **Created By**.

2. Click on an existing pick list. The **Packing Shipments** window appears. You can choose to print a packing slip and/or a picklist. Checkmark one or more purchase orders. Click on **Print Picklist** to generated a printable and exportable (Excel or PDF) pick list.



To generate a packing slip, checkmark one or more purchase orders to include in the packing slip and then click **Print Packing Slip**.

Removing Items and Deleting Picklists

Introduction

It may sometimes be necessary to manually remove items from a picklist or delete entire picklists. In this section we will describe how this can be done.

Removing Items from Picklists

Do the following to remove an item from a picklist:

1. Go to **Shipping/Receiving** under **Order Management** and **Picklists**.
2. Select a picklist in the list to display the related order shipments.
3. Select the shipment(s) you want to remove and click **Remove from Pick List.**
4. Click **OK** to confirm the deletion.

Deleting Picklists

Do the following to delete a picklist:

1. Go to **Shipping/Receiving** under **Order Management** and **Picklists**.
2. Select the picklist(s) you want to remove and click **Delete Selected**.
3. Click **OK** to confirm the deletion.

A picklist must be empty of all "packing shipments" (0 shipments remaining) before it can be deleted.

Shopping Carts

A **shopping cart (or basket)** is created in the system as soon as a visitor selects the **Add to basket** option on any page. The majority of carts are created automatically by shoppers from the front-end of the e-commerce site. However, if needed shopping carts can also be created and managed manually from **Order Management** under **Carts**. Registered and anonymous customer carts can be viewed in detail and manually converted into a purchase order.

In the following sections we will describe how to manage the shopping cart tasks from inside **Order Management**. For more information about the overall shopping workflow, refer to *Shopping Workflow* in this documentation.

Creating Shopping Carts

Introduction

Shopping carts are the first step in the shopping procedure, created before the purchase order. Each cart is unique and has its own ID#. When creating a cart manually, you must select a customer, and the system will automatically redirect you to an open cart for a customer if that customer already has a cart open. You can only have one cart open at a time per customer. When a cart is turned into an order, it will disappear from the carts list, and appear in the purchase order listing.

Functions in the Cart View

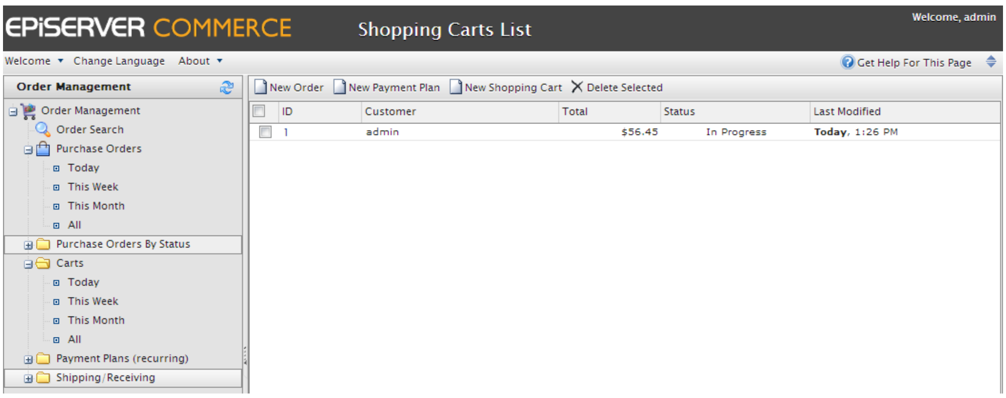
The carts view has the following functions and information:

- **New Order**
  Allows you to create a new order from here. Creating a new order means that this will not produce a cart to view and will not show up in this view screen. It will appear under **Purchase Orders**. Only use this button on this screen if you actually wish to create a new order from here.
- **New Payment Plan**
  Allows you to create payment plans which will appear under "Payment Plans (recurring).
- **New Shopping Cart**
  Creates a new cart assigned to a customer.
- **Delete Selected**
  Allows you to delete carts.
- **ID**
  Each cart has an individual ID which can be viewed from here by clicking the numbers.

Creating a Shopping Cart

Do the following to create a shopping cart manually:

1. Go to **Order Management** and **Carts**.
2. Select **New Shopping Cart**.
3. Select a customer to create the cart for. If you do not see your desired customer in the list click More to search for them.
4. Enter product items to the cart by selecting **New Line Item.**
5. Return to the **Carts** view to verify that the cart is there.



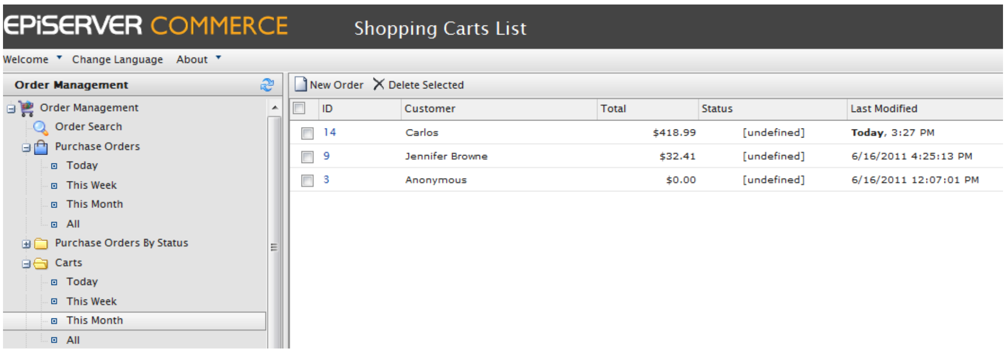
Converting Shopping Carts

Introduction

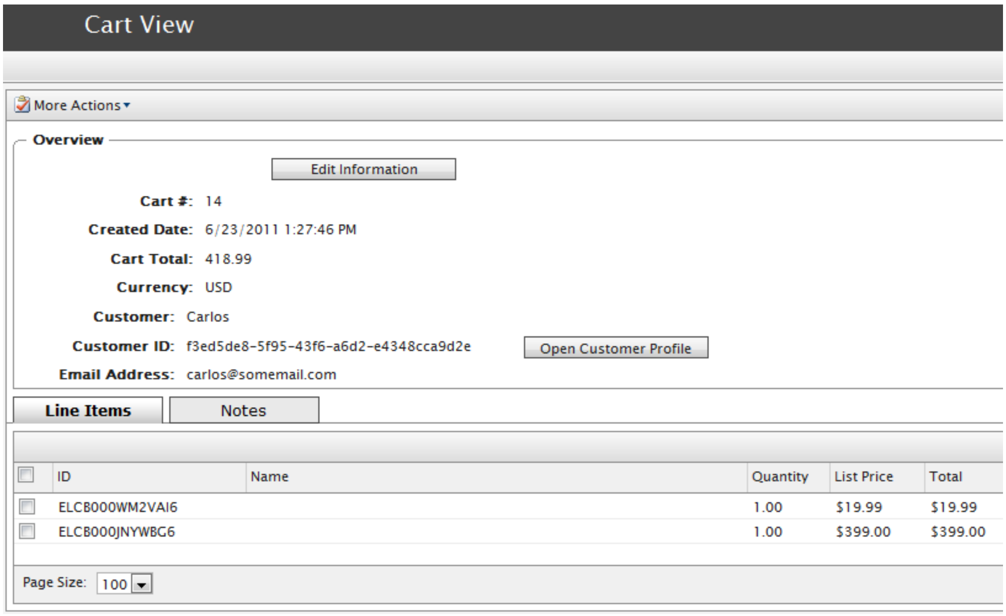
In most cases shopping carts will be automatically converted into purchase orders when shoppers proceed to checkout and finalize their purchase there. However, it might sometimes be necessary to manually complete a purchase by converting the shopping cart into an order for further processing.

Converting a Shopping Cart to a Purchase Order

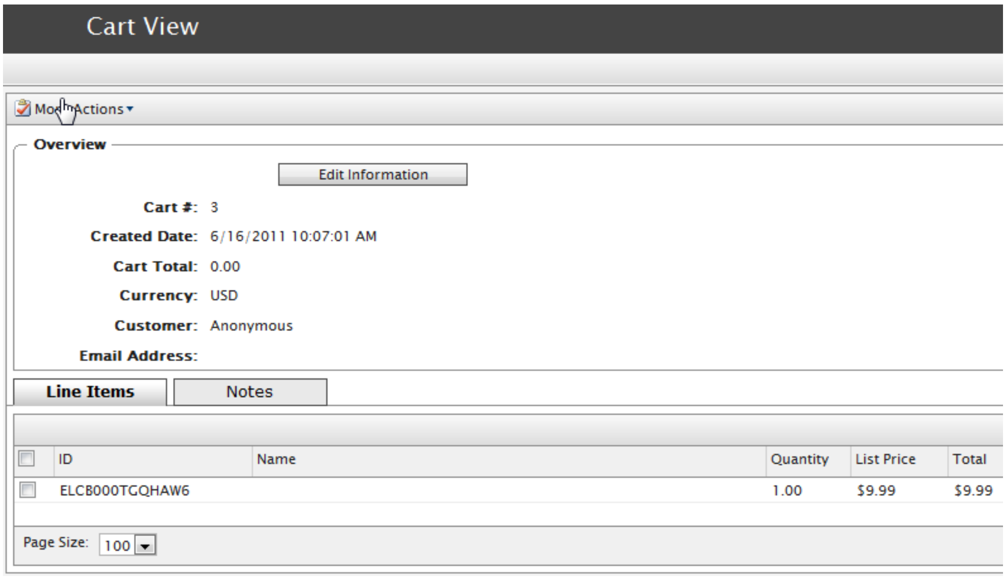
1. Go to **Order Management > Carts**. You will see the **Shopping Carts** list. You can also select "Today," "This Week," or "This Month" to filter by date range.



2. Click on the **ID** number of the shopping cart you want to convert over to a Purchase Order.
3. You will see the **Cart View** window and details of the customer's shopping cart.

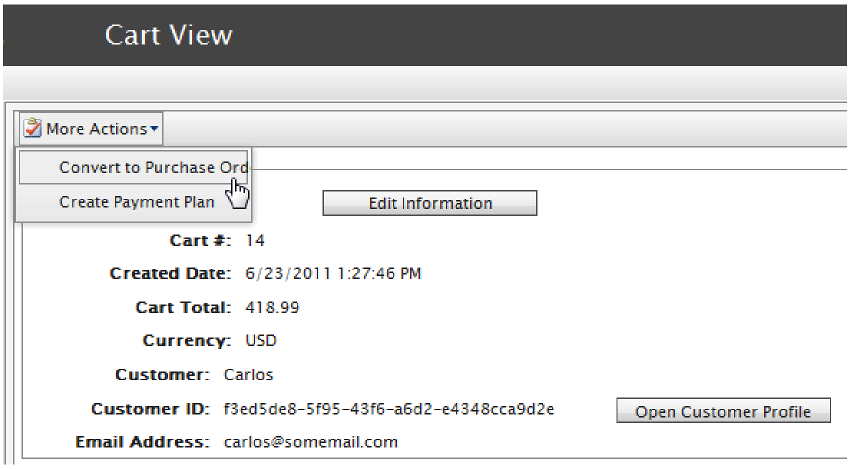


An **anonymous user Cart View** will look like this:



a. **Edit Information** - You can change the currency to be used for the Purchase Order.
b. **Open Customer Profile** - You can view the profile of the registered customer (this option is not available for anonymous shopping carts).
c. **Line Items** - This is the list of items currently in the customer's shopping cart, displaying the **Quantity** of each item, **List Price**, and **Total**.
d. **Notes** - You can add, edit, or delete notes about the shopping cart.

4. Click on **More Actions** and click on **Convert to Purchase Order**.



The page refreshes and shows the Order view page for *further processing of the purchase order*.

Returns and Exchanges

Introduction

Once a package has been finalized and shipped out, EPiServer Commerce enables you to process **returns** and **exchanges** directly in the order. A "return" is the actual return of the faulty delivery item. The customer can either be refunded or be compensated by an "exchange" of either the same product item or something else.

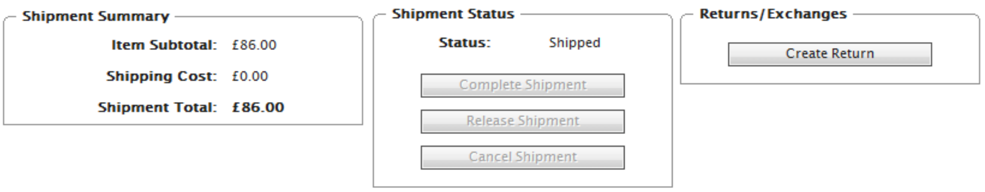
Generating an exchange creates a separate **Exchange Order** (denoted by "EO", instead of "PO") tied to the original purchase order. An exchange order is similar to *processing a purchase order*, as it involves payment processing and releasing packages for shipment.

Returns and exchanges can only be processed once a purchase order status is tagged as "Completed."

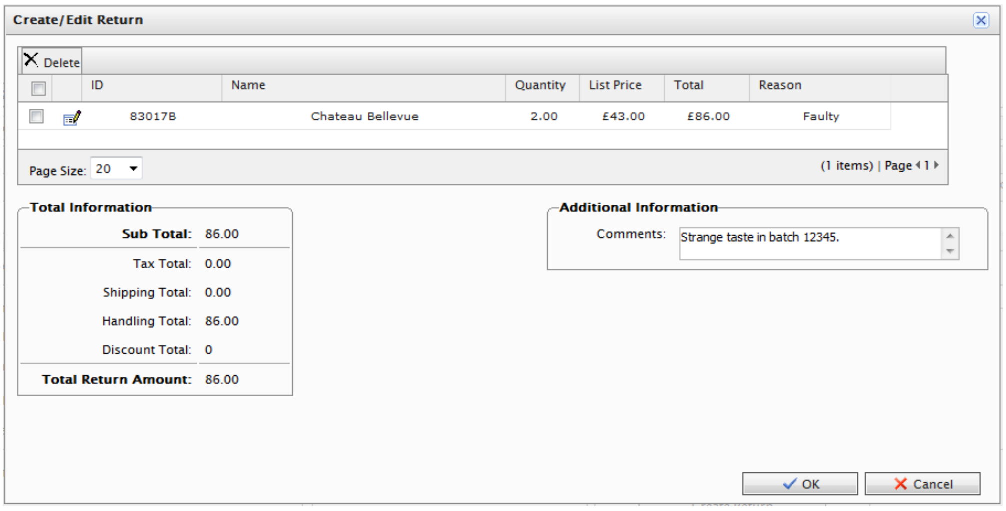
Initiating a Return

Do the following to initiate a return:

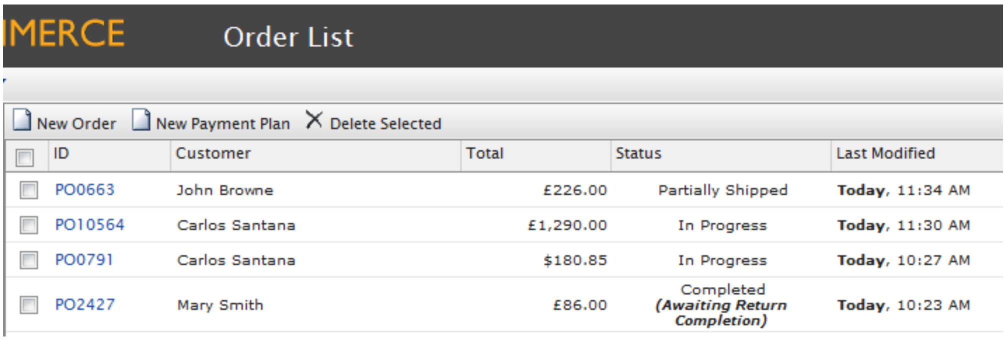
1. Go to purchase order that has been finalized and shipped. Go to the **Details** tab and you will see that the **Create Return** is available under **Returns/Exchanges**. Click on it to begin the return and/or exchange process.



2. The **Create/Edit Return form** appears. Click on **New Item** to add associate the items to be returned.
3. The Line Item drop-down menu defaults to the items that were in the original purchase order. You can set the **Return Quantity** and the **Return Reason** from the drop-down list (Faulty, Unwanted Gift, Incorrect Item). You can also add additional information to the return. Click **OK** to save your changes.

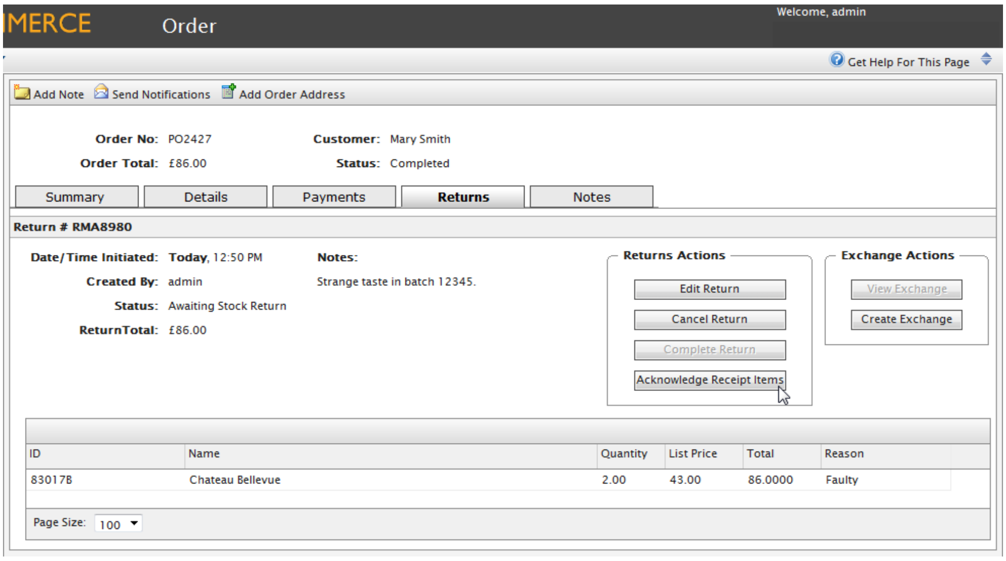


4. The purchase order will go into **Edit Mode**. Click **Save** to continue the return process. Otherwise, click **Cancel** to cancel the return.
5. In the **Order List**, the order will now appear with status **Completed/Awaiting Return Completion**.



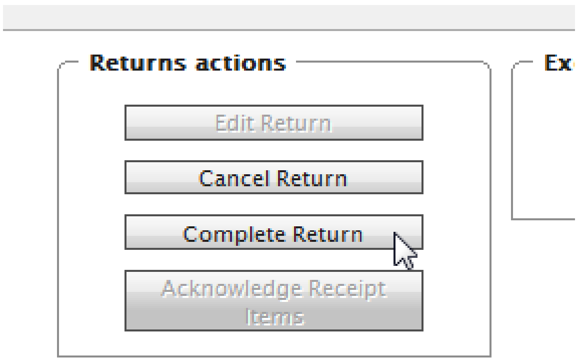
Return Completing Actions

1. Click on the **Returns** tab to process the return further. Once you get a notice from the shipping department, for example, that they have received the returned item, click on **Acknowledge Receipt Items**.

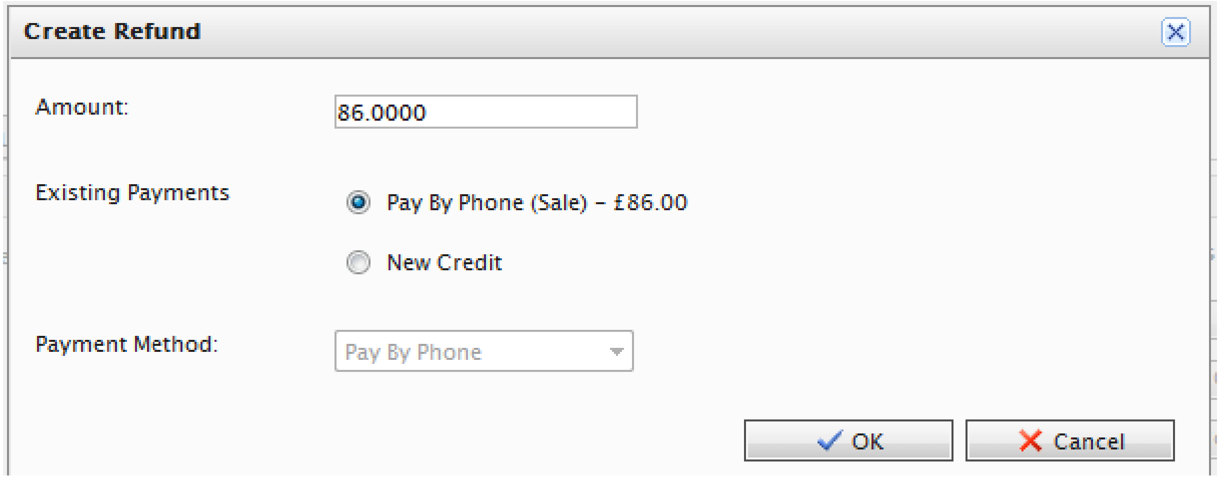


You can also choose to edit the return or cancel the return completely.

2. Once you click on **Acknowledge Receipt** Items, the **Complete Return** becomes available.



3. Click on **Complete Return** to open the **Create Refund** form.

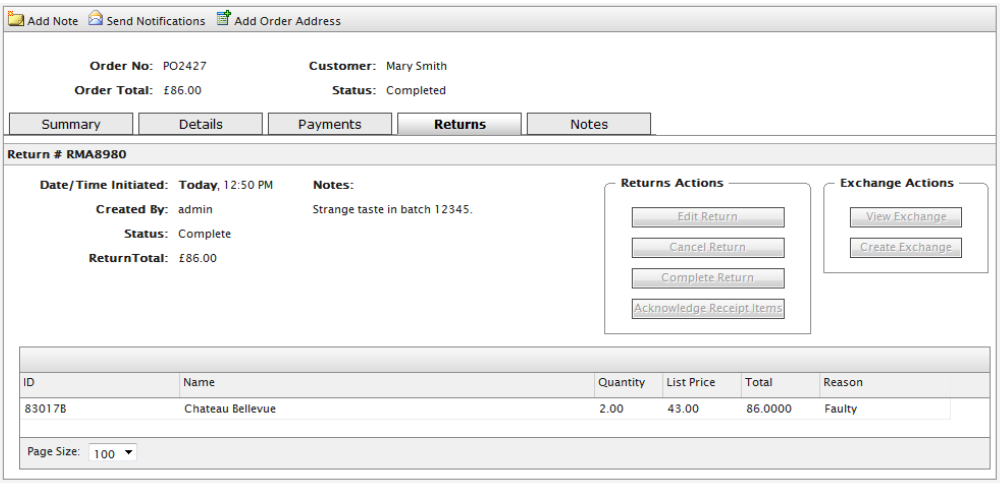


a. The Amount value defaults to the invoice cost of the item (not including the shipping costs). For example, if the item cost $49.99 and the shipping cost was $2, then the Amount text box will show $49.99.

   However, you can specify a different amount to refund to the customer, including the full cost of the order, item(s) + shipping cost. By default, the refund will be deposited based on the payment method the customer used to make the order.

b. If the customer wants the refund processed and deposited to a different credit card or payment method (such as cash, money order, or electronic transfer), click on the **New Credit** radio button and you can enter their alternate credit card information or other refund payment information.

4. Once done, click **OK** to create and process the refund. The status of the purchase order changes to **Completed**.

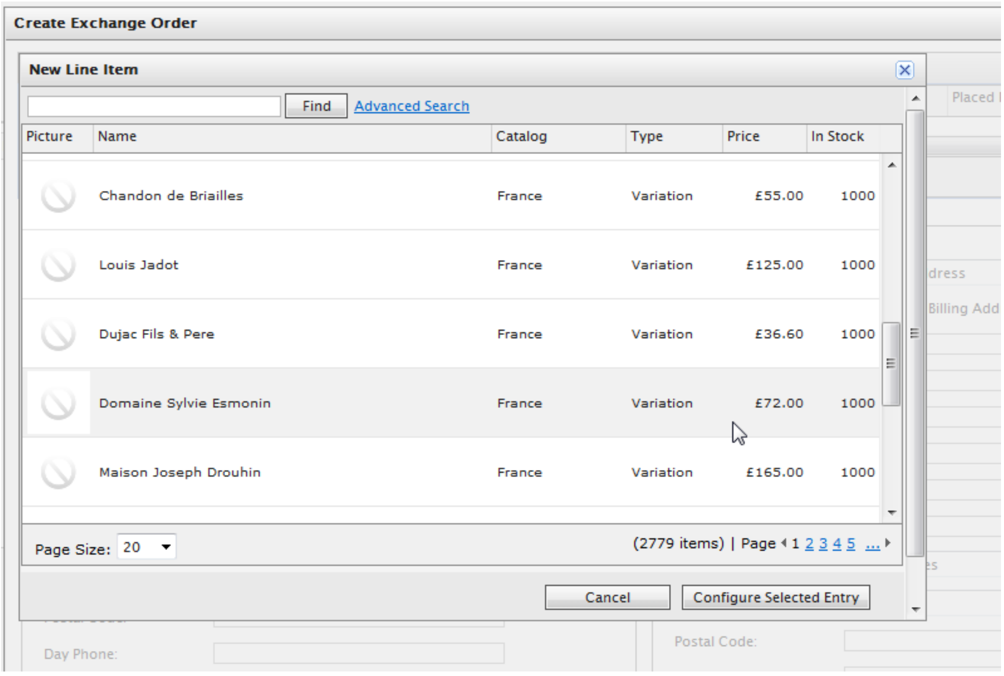


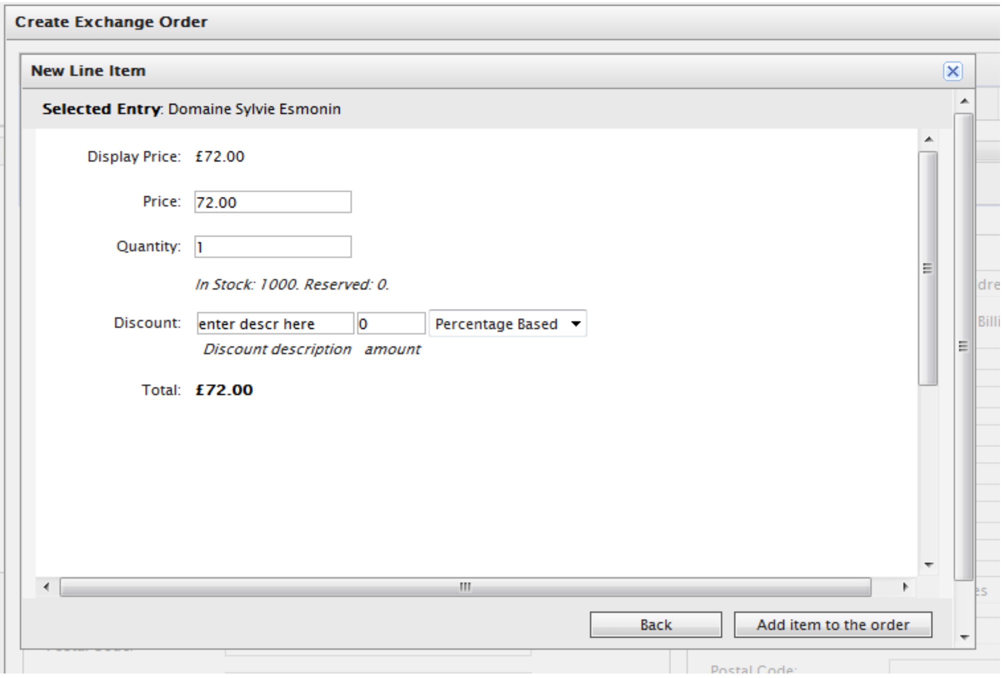
Initiating an Exchange Order

Do the following to initiate an exchange order:

1. Go to a Purchase Order, click on the **Details** tab, and then click on **Create Return**.
2. Add the items for exchange.

3. Click on the **Returns** tab and click on **Acknowledge Receipt Items**. Click **Create Exchange** to open the **Create Exchange Order form**.
4. Click on **New Item** and then select the item to be exchanged by clicking **Configure Selected Entry**. You can adjust the price, quantity, and applicable discounts before you add the item to the Exchange Order by clicking **Add items to the order**.





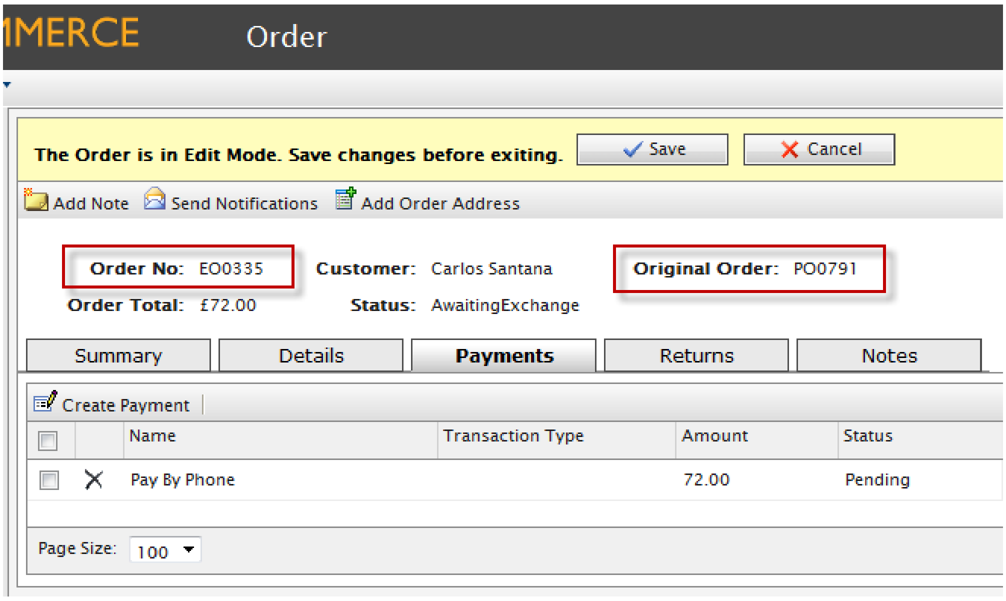
5. Enter a shipping and billing address. Select the shipping method to use for the Exchange Order. Click on **Recalculate** to adjust the Summary total.

6. Click **OK** once done.

Viewing an Exchange

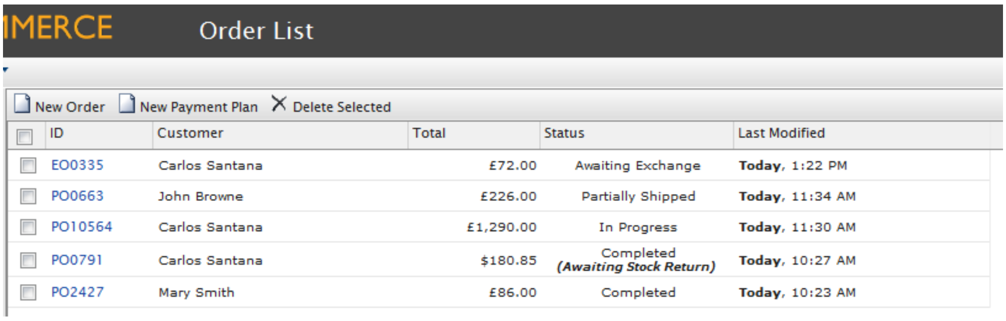
1. Once an Exchange Order (EO) has been created, click on **View Exchange** to view the details of the EO. An EO is similar to how a Purchase Order is set up.

2. Click on the **Payments** tab to add a payment to the Exchange Order. Select a payment method for processing the EO. You can adjust the amount if needed (the amount default value is based the item cost + shipping).



3. The Exchange Order goes into **Edit Mode**. Click on **Save** to process the payment and the order. The payment Transaction Type changes to "Authorization."

4. In the **Order List**, the there will be an exchange order with prefix EO instead of PO, and with status **Awaiting Exchange**.



5. Go back to the original Purchase Order and click on the **Returns** tab. Click on **Complete Return** to enable the Customer Service Representative (CSR) to release the EO shipment. Optionally, you can cancel the shipment to cancel the Exchange Order. Once you release shipment, the CSR repeats the same process as he would when shipping a Purchase Order.

Marketing

Introduction

The **Marketing** system is where you will come to create coupons, discounts, and promotions that can be applied to products, orders, or shipping. Most commonly, these promotions will be created and managed by marketing and catalog managers, as well as other users or administrators who handle pricing and discounts.

The **Marketing** system makes it possible to create unique and compelling discounts and promotions. Any discount that you create can be either percentage or value based. You will also have the ability to create campaigns and customer segments so that you can target the promotions you have created to specific customers or time periods.

The **Marketing** system consists of the following components:

- **Promotions** - any sort of discount or coupon that can be applied to individual catalog entries, orders or shipping charges.
- **Customer Segments** - a subset of customers or users of your website to whom you can target individual promotions or campaigns.
- **Campaigns** - a logical grouping of promotions and/or customer segments which will run over a specified period of time.
- **Expressions** - conditions expressed in XML which are used to extend or create custom promotions.
- **Policies** - global rules that are applied to all aspects of the marketing system, and promotions in particular.

Working With Marketing

The work with the marketing system includes the following tasks:

- Creating different types of *promotions* with discounts and coupons
- Configuring *customer segments* used for targeting of promotions to specific groups of users and customers

- Creating and managing *campaigns*, which can be targeted to specific groups of users
- Configuring *expressions* and *policies* for defining additional rules and promotion types

Promotions

Promotions provide a way to apply various discounts to 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**.

Through the use of *Expressions* you can apply **conditions** to promotions. These conditions vary from the number of items, the percentage discount, shipping rates and many others.

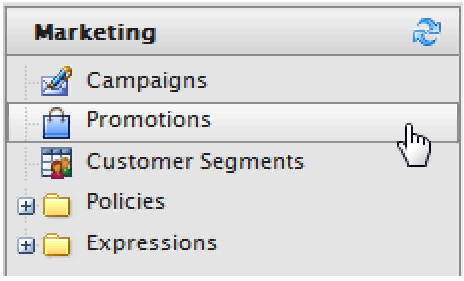
There are a number of built-in types of promotions that can be created and applied to individual **catalog entries**, **orders**, and **shipping**:

- *Entry level promotions*
- *Order level promotions*
- *Shipping level promotions*

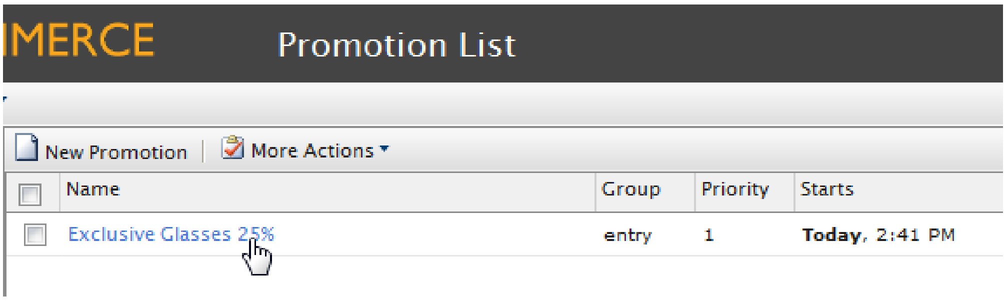
You can also build your own *custom promotions*.

Browsing Promotions

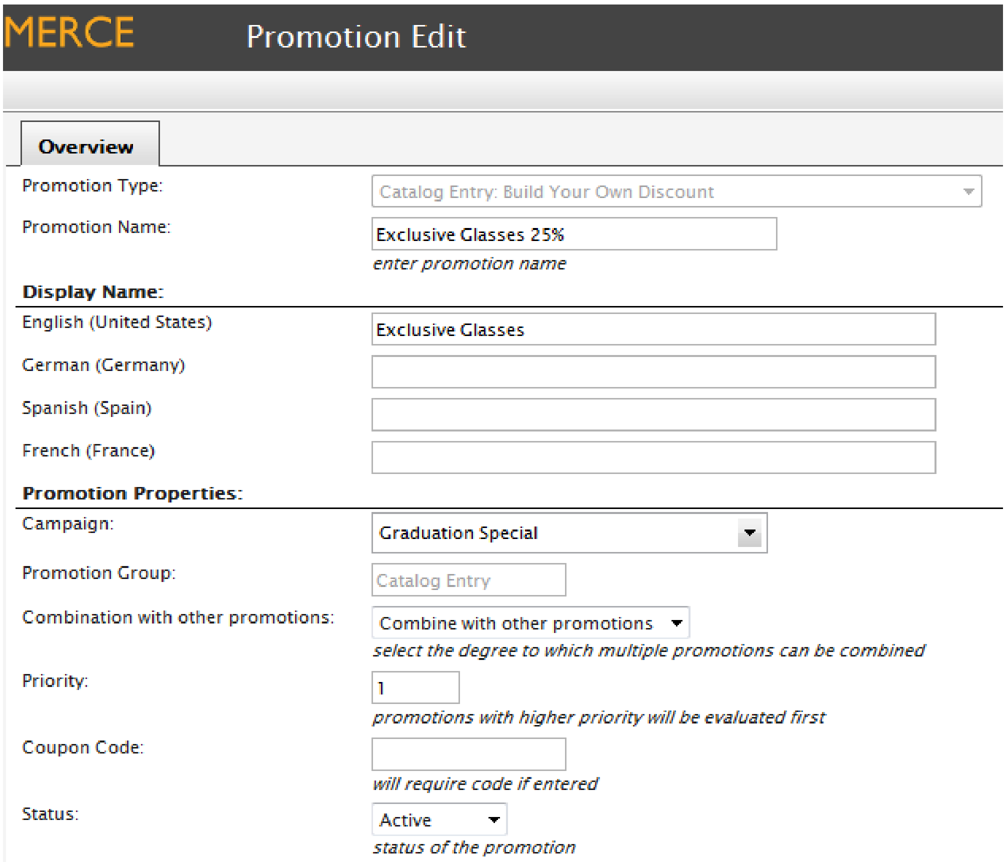
To view and browse promotions, click on **Promotions** on the left navigation bar.



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



You can click on the name of a promotion to view its properties.



Creating an Entry Level Promotion

Introduction

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

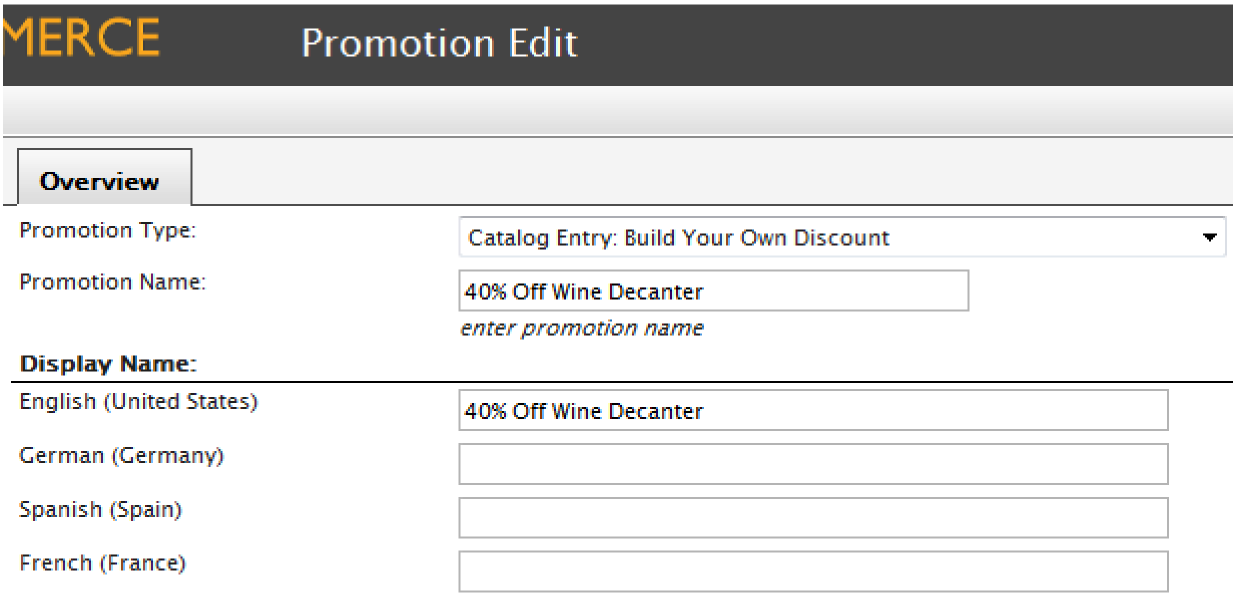
- **Catalog Entry: Build Your Own Discount**
- **Catalog Entry: Buy Catalog entry X, get catalog entry Y at a discount**
- **Catalog Entry: Buy X Get $ Off Discount**

The options above are available in the **Promotion Type** field when creating a new promotion. The following are examples of how to create each type of promotion.

Example: Build Your Own Discount - "40% Off Wine Decanter"

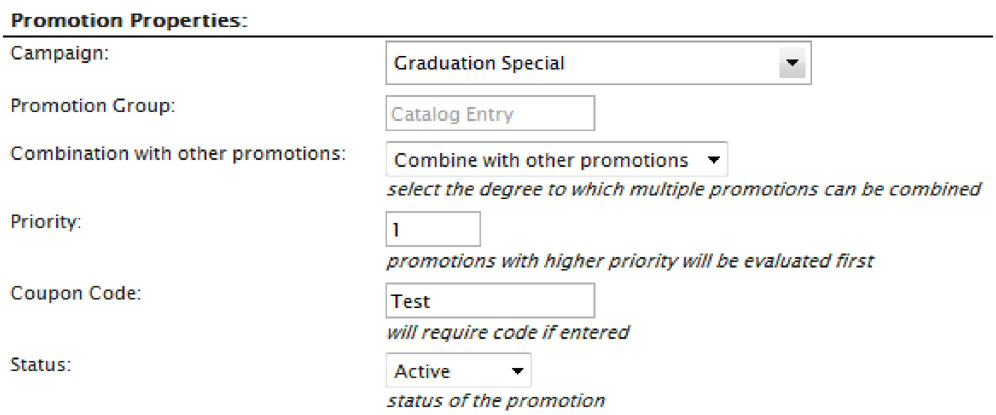
Once you have selected "Build Your Own Discount" from the **Promotion Type** drop-down menu, enter in a **Promotion Name**, such as "40 % Off Wine Decanter"

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



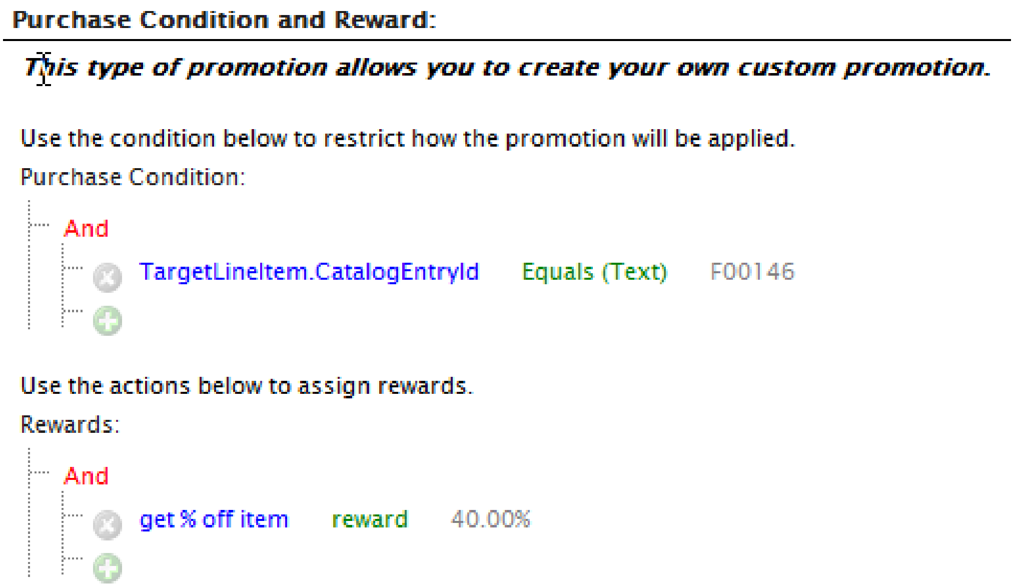
Promotion Properties:

- 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 the degree to which multiple promotions can be combined. There are three options: "Combine with other promotions", "Exclusive within select groups", and "Exclusive within all groups."
  - **Combine with other Promotions** - The selected promotion will be combined with all other promotion types that may be in use
  - **Exclusive within Selected Groups** - If the selected promotion is applied, no other promotions within that group will be applied (but other promotions in other groups may be applied)
  - **Exclusive within all Groups** - If the selected promotion is applied, no other promotions will be applied.
- 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.



Purchase Condition and Reward:

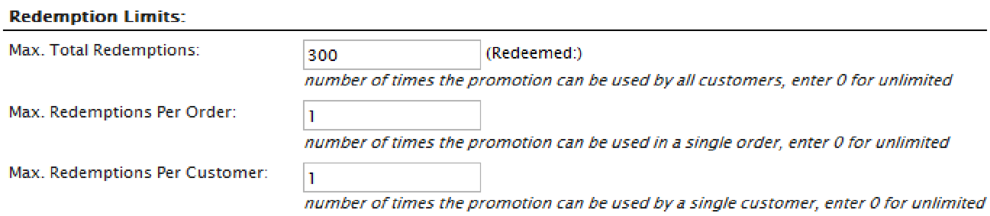
Here you can set your own **Purchase Condition** to receive the discount **Rewards**. To apply a 40% discount for a wine decanter, use the following settings in the screenshot.



Redemption Limits:

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

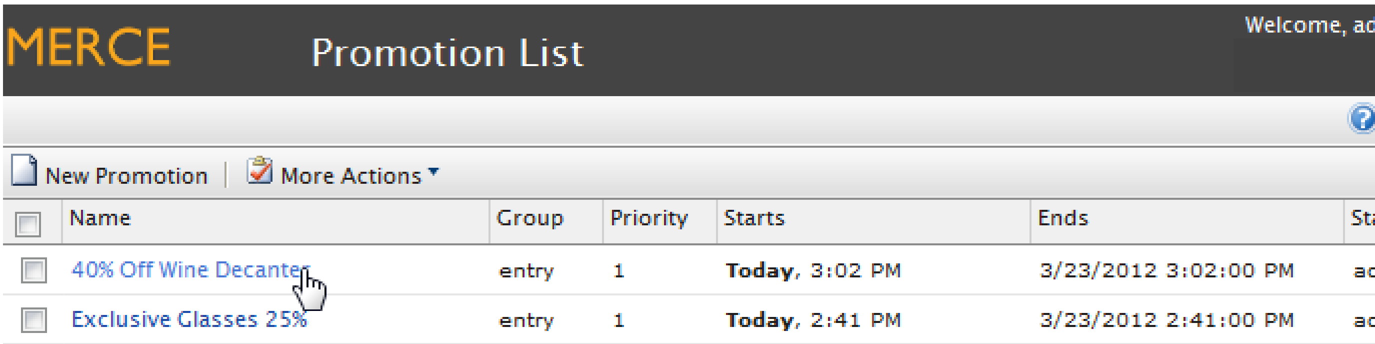
- Next to **Max. Total Redemption**, enter in the maximum number of times the promotion can be redeemed.
- Next to **Max. Redemptions Per Order**, enter in the maximum number of times the promotion can be redeemed per customer order.
- Next to **Max. Redemptions Per Customer**, enter in the number of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



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**.

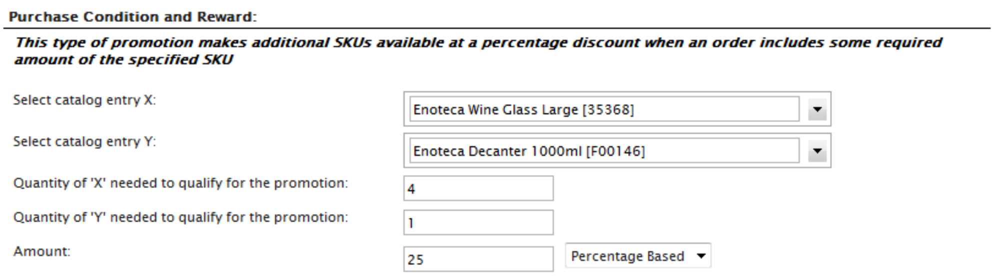


When the promotion is applied, the price on the front-end should change.

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 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 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 a value for the **Quantity of "Y" needed to quality 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.



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 a **Minimum quantity** that the customer needs to purchase in order to receive the discount.
2. Enter 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.

Creating an Order Level Promotion

Introduction

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

Out of the box, you can build these **Order Entry Promotion Types**:

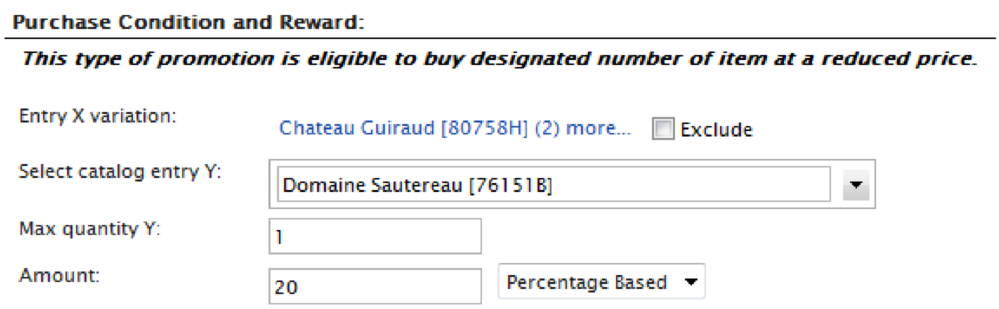
- **Order: Buy X, get N quantity of Y at a discount**
- **Order: Sub Total Volume Discount** - if the order subtotal minimum is met, then the customer receives the discount.
- **Build Your Own Discount** - you can create a custom order level promotion based on a range of purchase conditions and rewards (similar to creating a custom catalog entry discount).

The options above are available in the **Promotion Type** field when creating a new promotion. The following are examples of how to create each type of promotion.

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.

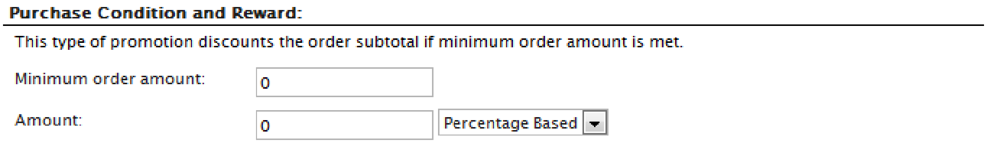
1. Select an **Entry X variation** from the drop-down menu and click on "add variation.
2. **Select catalog entry Y** from the drop-down menu. A certain number of "Y" entries will be discounted based on the Purchase Conditions.
3. Enter a **Max quantity Y** for the maximum number of Y entries eligible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



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.

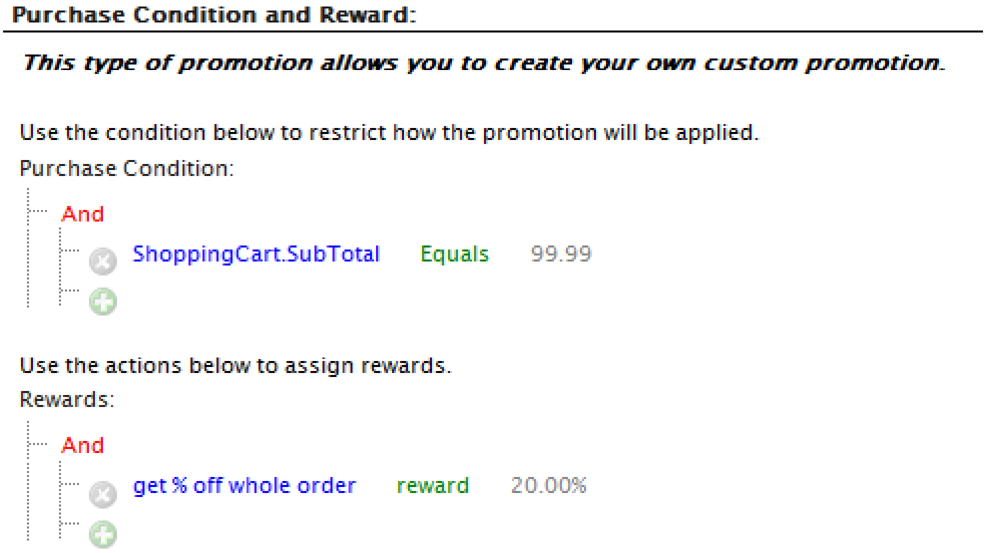
Enter in the **Amount** of the discount. It can either be "Percentage Based" or "Value Based." If Percentage Based, then the customer gets a percentage off the price. If Value Based, the customer gets a fixed amount discounted off.



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.



The discount should reflect on the shopping cart on front-end public site.

Creating a Shipping Level Promotion

Introduction

Shipping Level Promotions are promotions that give discounts based on the overall shipment. The discount will appear on the order page just before you submit the order.

Out of the box, you can build these **Order Entry Promotion Types**:

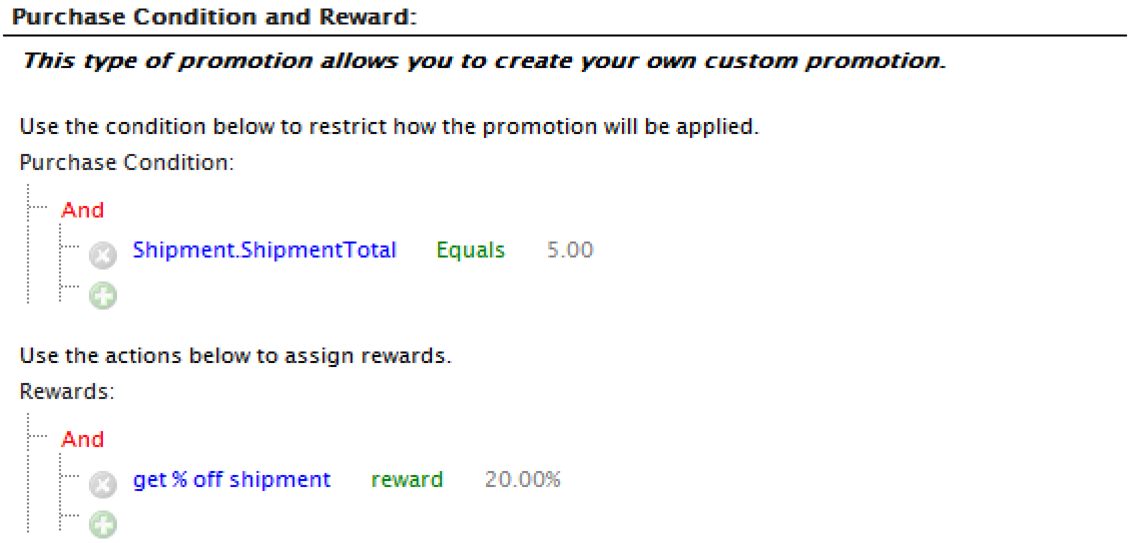
- **Shipping: Build Your Own Discount** - you can create a custom shipping promotion based on a range of purchase conditions and rewards (similar to creating a custom catalog or order entry discount).

The option above is available in the **Promotion Type** field when creating a new promotion. The following are examples of how to create each type of promotion.

Example: Buy N quantity Get % Off Shipment Discount

This Promotion type applies shipping discount if the specified **Variations** total the **Minimum Quantity** set or more.

1. Enter a **Minimum Quantity, for example "5".**
2. Enter an **Amount** of the discount Reward, and select from the drop-down whether it is "Percentage Based" or "Value Based, for instance "20%".



Creating Custom Promotions

Introduction

You can create custom promotions instead of using the built-in ones. It is possible to create custom promotions on a **catalog**, **order**, or **shipping** level.

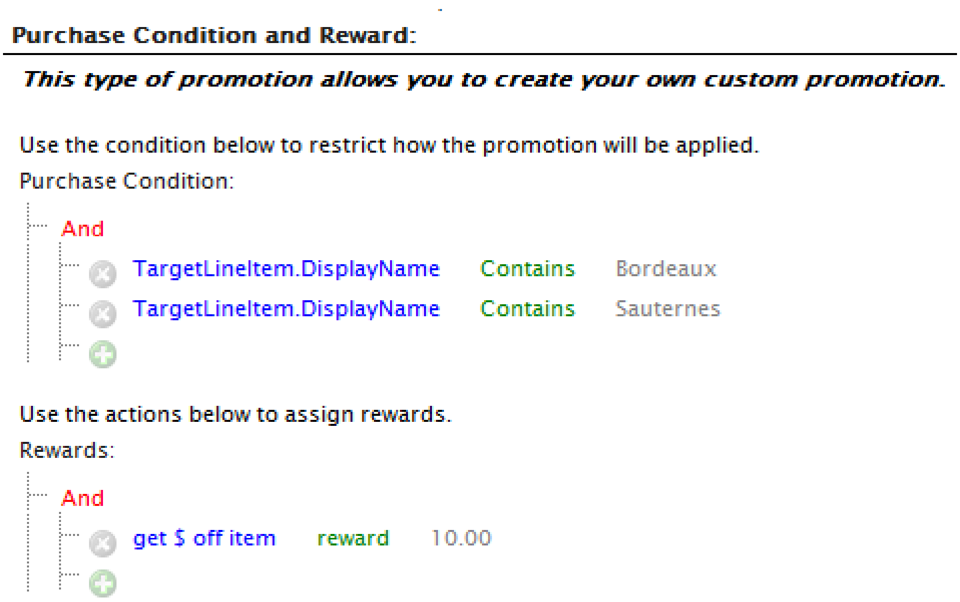
How to Use "Or" When Building Your Own Promotions

EPiServer Commerce has a powerful discounting engine and can be used to build all types of promotions without writing custom code. In most cases these discounts can be built using one of the built in "Build Your Own Discount" options.

Building the Discount

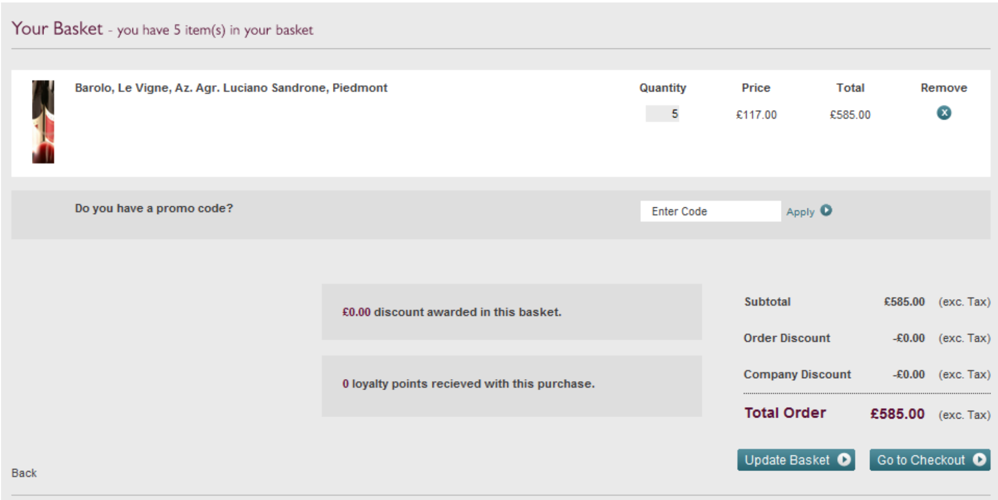
In this case we want to build a promotion that will give a $10 discount on certain items in our catalog. We want products with "Bordeaux" OR "Sauternes" in the display name to receive $10 off the item. In this case we are using a Promotion Type **of "Catalog Entry:Build Your Own Discount"**. Constructing the purchase condition can be a confusing when using the **Or** operator. The first item we must add to the condition is the **Or** operator since **And** is the default. The **Or** will have the effect we desire if added first which is And (Or (DisplayName = Bordeaux, DisplayName = Sauternes)) which is translated by the rules engine to **And** (DisplayName = Bordeaux **Or** DisplayName = Sauternes). If **the** Or is not added first the results will not be as desired as the DisplayName would have to contain Bordeaux And Sauternes.

The Reward is set to $10 Off.



Seeing the Discount Applied

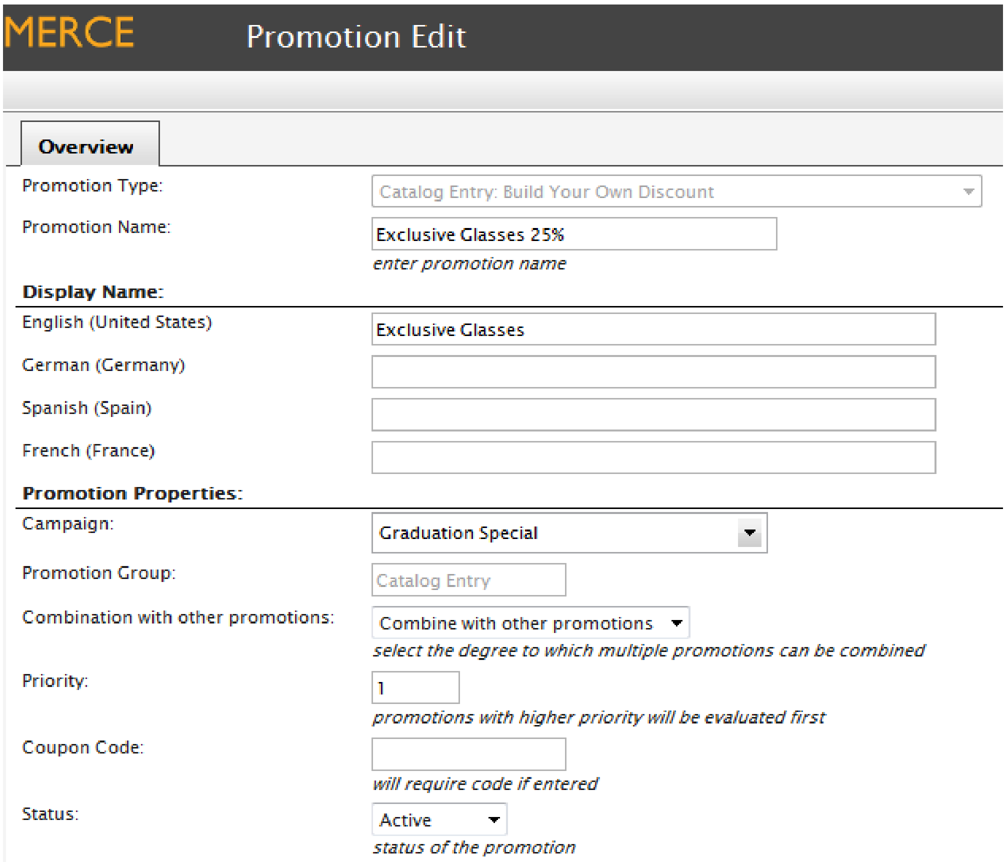
We have added three items to our shopping cart. As you can see two of the items (containing "Bordeaux" and "Sauternes") have been given the $10 off discount and the name of the promotion is shown with the item. The third item in our cart did not meet the criteria we set so no discount was applied.



Editing, Activating and Deleting Promotions

Editing a Promotion

To edit an existing promotion, go to **Marketing** and **Promotions** to expand the list of promotions. Select a promotion to edit by clicking on the promotion name in the list.

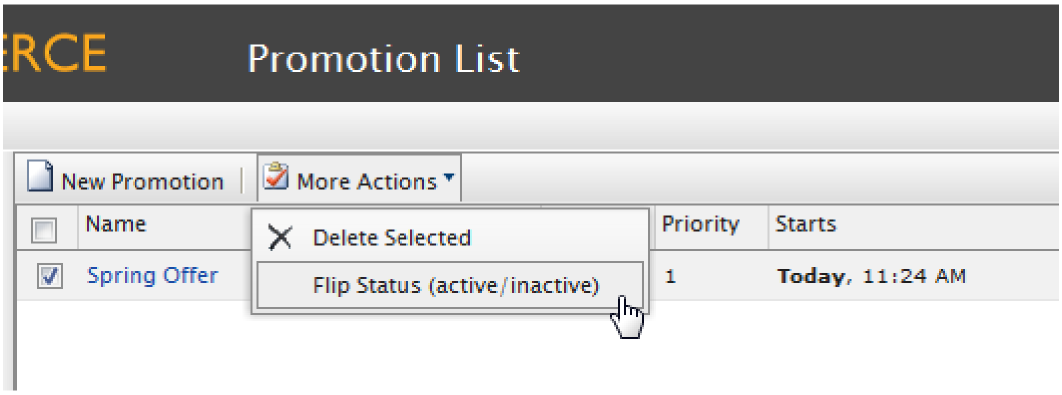


Update the information and click **OK** to save your changes.

Activating and Inactivating Promotions

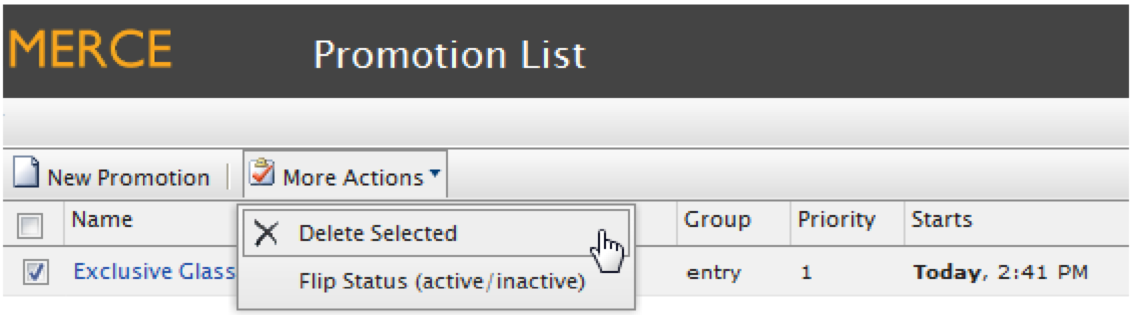
Once a promotion has been created it can be activated and inactivated from the **Promotion List** view. This is useful if you want to keep the promotion for reuse on another occasion.

In the **Promotion List** list, checkmark the box next to the name of the promotion and then click on **More Actions > Flip status (active/inactive)** on the menu bar. The selected promotion(s) will be activated/inactivated depending on their current status.



Deleting a Promotion

In the **Promotion List** list, check the box next to the name of the promotion and then click **More Actions > Delete Selected** on the menu bar. Click **OK** to confirm the deletion.



Customer Segments

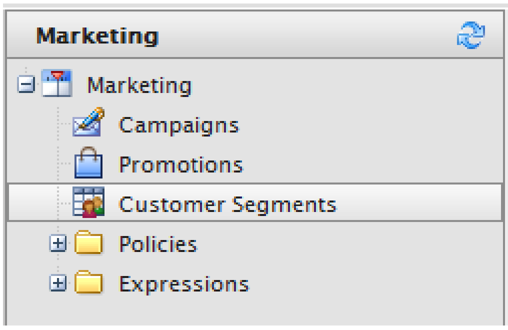
Customer Segments determine the **target audience** for *Promotions* or *Campaigns*. Within a campaign, all promotions will be applied to whatever customer segments associated with the same campaign. Members of the customer segments can be pre-defined in static groups or you can use *Expressions* to 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 or she immediately becomes part of the target customer segment.

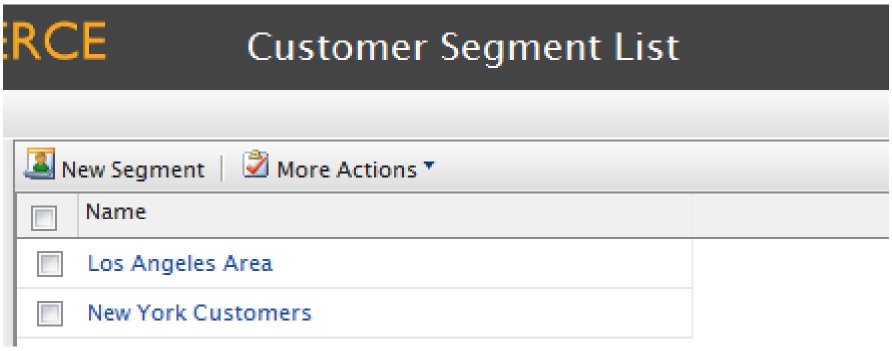
You can *create a customer segment* and manually assign specific contacts to the customer segment, or you can use conditions to apply rules that automatically make selected customers become part of the customer segment.

Browsing Customer Segments

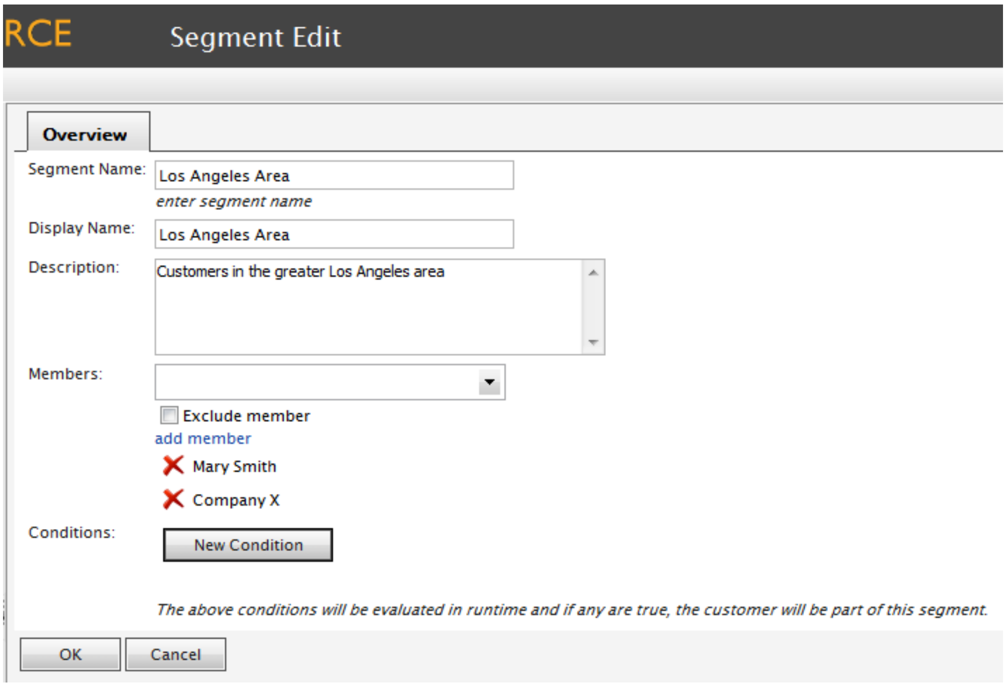
To view and browse customer segments, click on **Customer Segments** on the left navigation bar.



The **Customer Segments List** page opens, displaying a list of existing customer segments.



You can click on the name of a customer segment to view its properties.



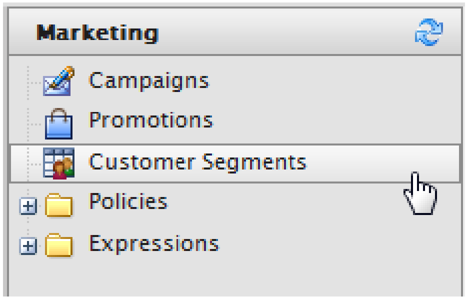
Creating Customer Segments

Introduction

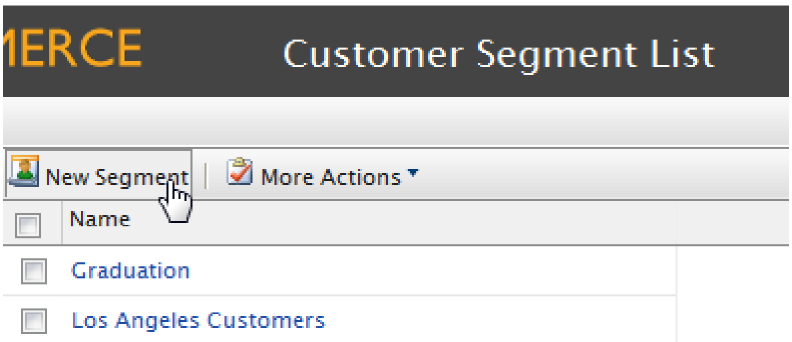
Customer Segments defines a specific groups of customers to be targeted by *Promotions* or *Campaigns*.

Creating a Customer Segment Assigned to Contacts

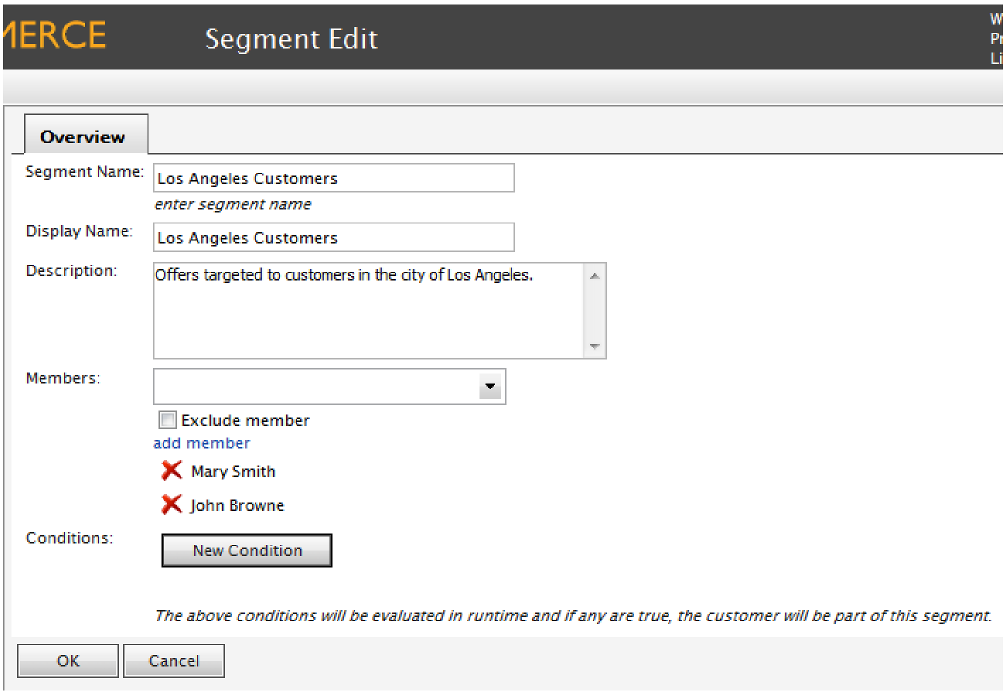
Go to **Marketing > Customer Segments**.



Click on **New Segment** on the menu bar to open the **Segment Edit** page.



1. Enter a **Segment Name**, such as "Los Angeles Customers."
2. Enter in a **Display Name**, which will appear to users when associating this customer segment when *Creating a Marketing Campaign*.
3. Enter 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.



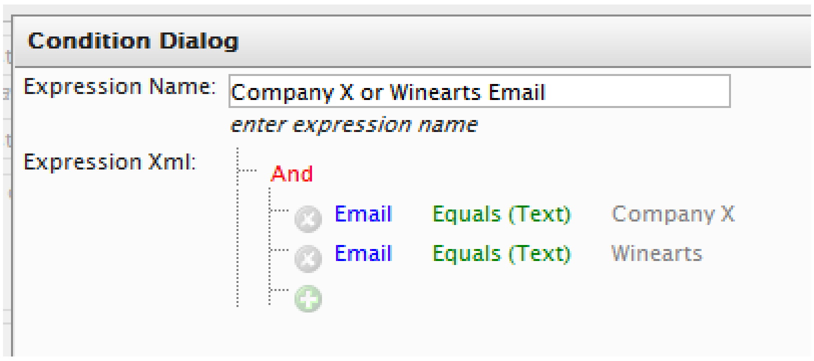
Creating a Customer Segment With Conditions

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.

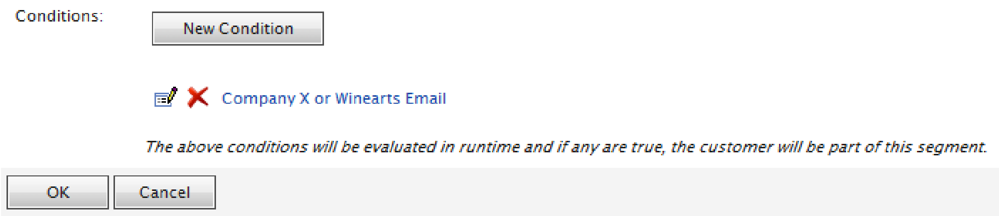
To add conditions to the customer segment, click on **New Condition** on the **Segment Edit** page. This example will show how to specify "Company X" or "Winearts" emails as part of this customer segment.

Enter an **Expression Name**, such as "Company X or Email Addresses."

Setup the conditions based on the image below.



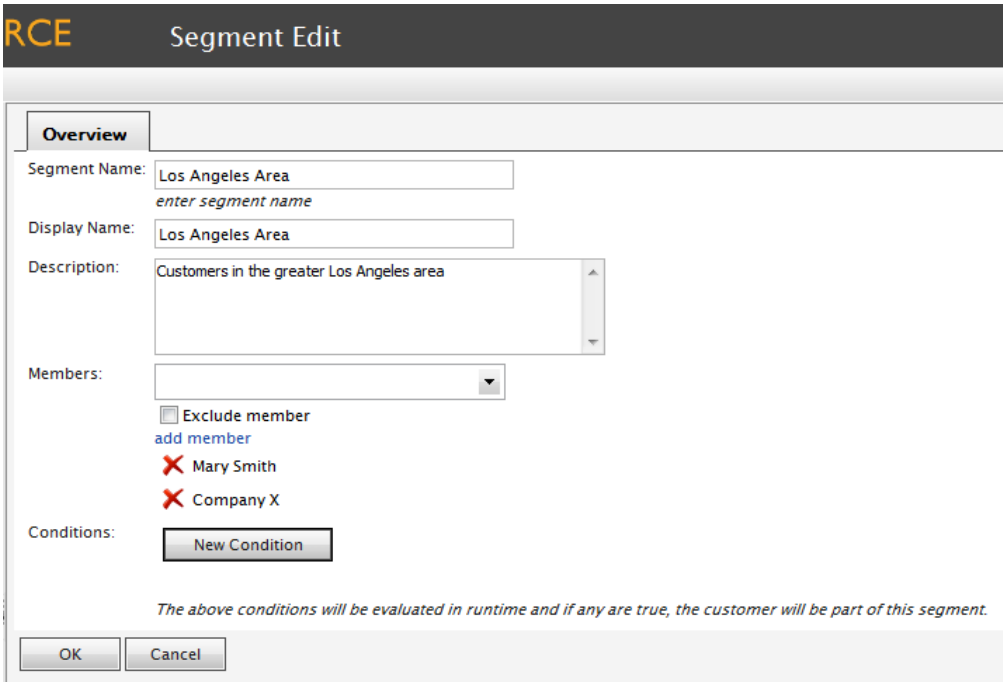
Click **OK** to save the Conditions.



Editing and Deleting Customer Segments

Editing a Customer Segment

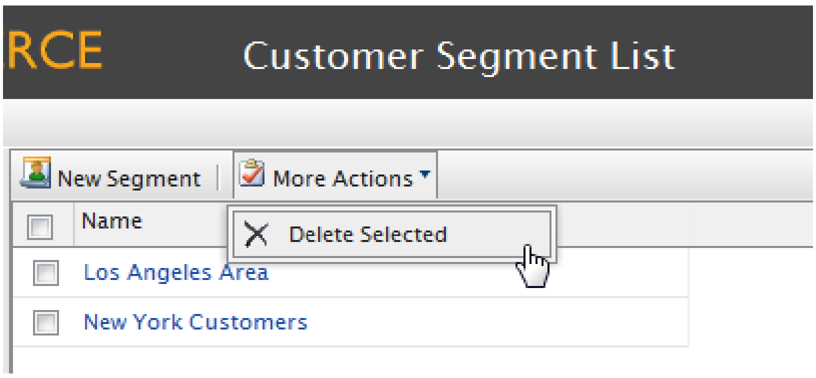
To edit an existing customer segment, go to **Marketing** and **Customer Segments** to expand the list of customer segments. Select a customer segment to edit by clicking on the customer segment name in the list.



Update the information and click **OK** to save your changes.

Deleting a Customer Segment

In the **Customer Segment** list, check the box next to the name of the customer segment(s) and then click **More Actions > Delete Selected** on the menu bar. Click **OK** to confirm the deletion.

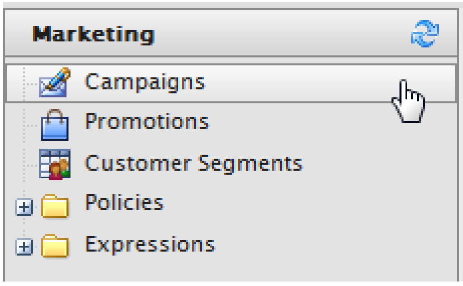


Campaigns

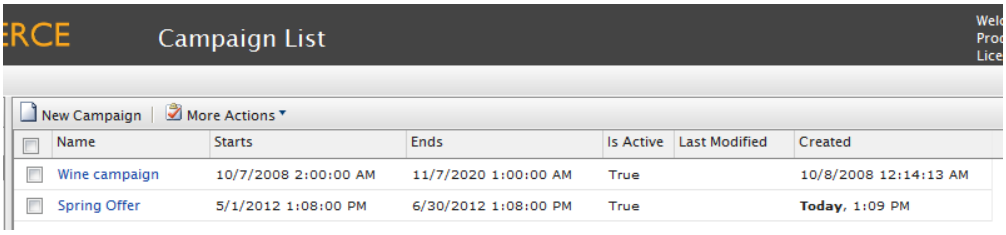
Campaigns provide a way to organize marketing activities. Campaigns must be associated with *Promotions* in order to provide customer discounts. Optionally, campaigns can also be tied to *Customer Segments* for targeted marketing purposes. For example, you can create a seasonal campaign that will include different promotions targeted for the spring season. Campaigns are the first step to deploying targeted marketing efforts on your e-commerce website.

Browsing Campaigns

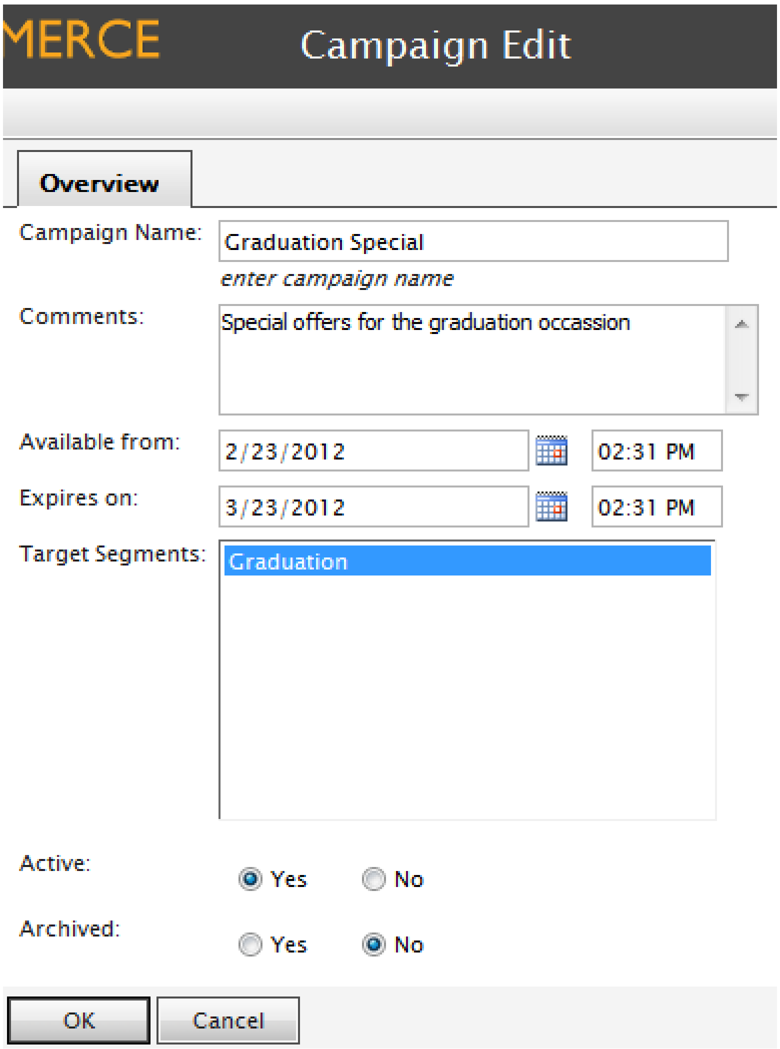
To browse existing campaigns, go to **Marketing > Campaigns** to open the **Campaign List**.



From the **Campaign List**, you can view existing campaigns.

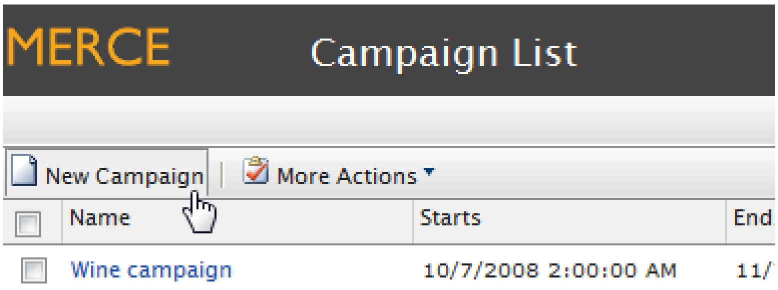


You can click on the name of a campaign to view its properties.



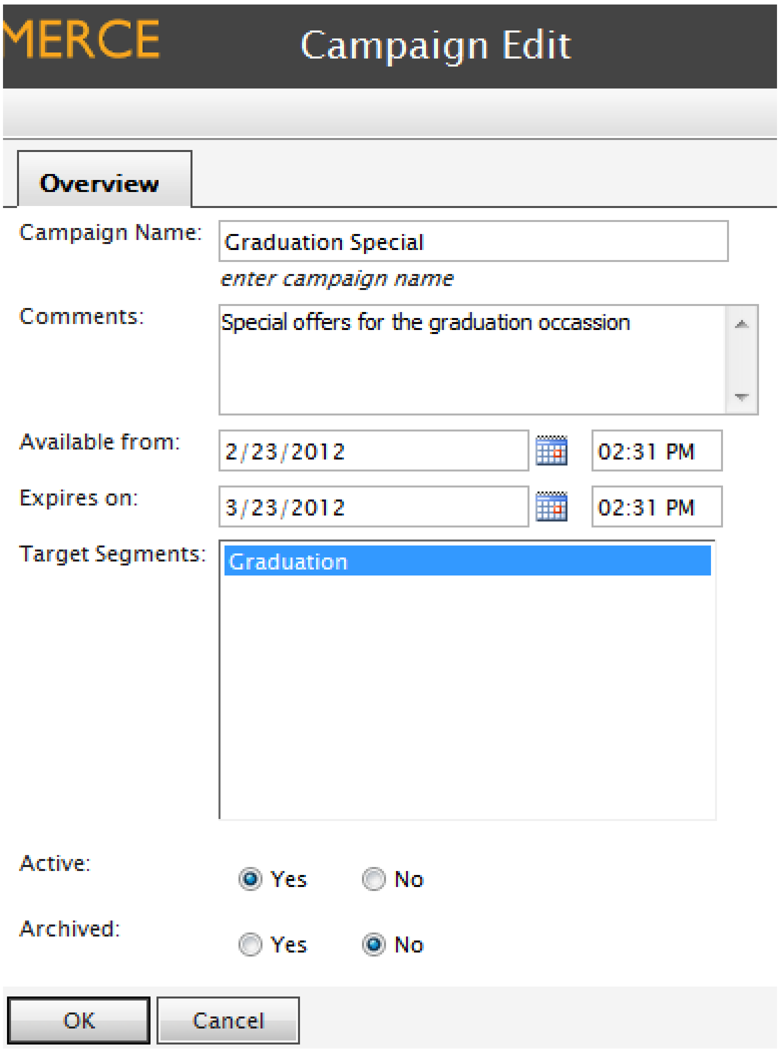
Creating Campaigns

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



2. This opens up the **Campaign Edit** page. Enter a **Campaign Name**, such as "Graduation Special."
3. Enter any **Comments** as notes about the Campaign.
4. Enter 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.
5. Enter a date and time in the **Expires On** field.
6. Select the **Target Segments** from the list. Target segments are created under the *Customer Segments* section

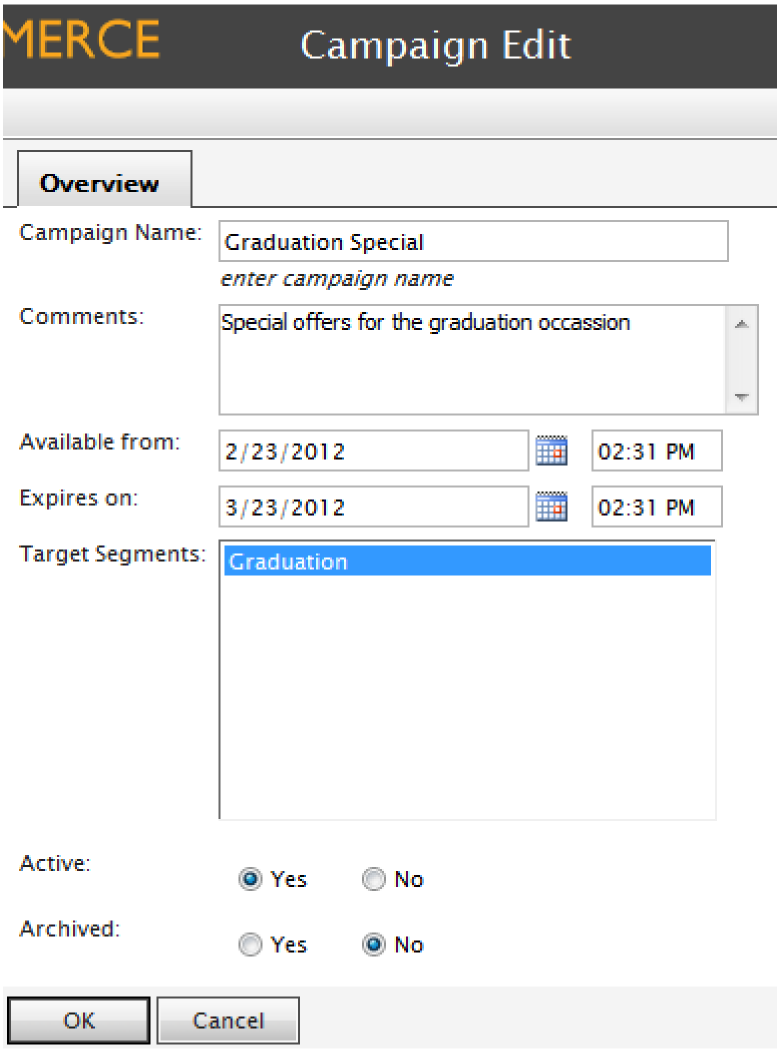
7. Indicate whether or not the Campaign is **Active**, "Yes" or "No."
8. Indicate whether or not to **Archive** the Campaign, "Yes" or "No. **NOTE** This feature has not been implemented and switching its status from "No" to "Yes" will not change anything.
9. When done, click **OK**.



Editing and Deleting Campaigns

Editing a Campaign

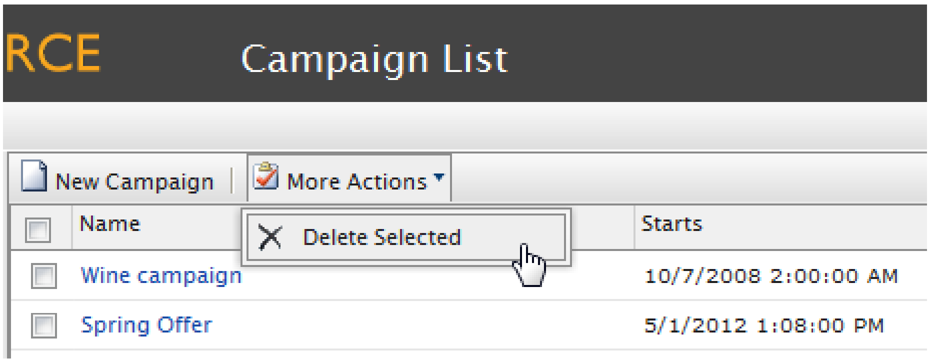
To edit an existing campaign, go to **Marketing** and **Campaigns** to expand the list of campaigns. Select a campaign to edit by clicking on the campaign name in the list.



Update the information and click **OK** to save your changes.

Deleting a Campaign

In the **Campaign** list, check the box next to the name of the campaign(s) and then click **More Actions > Delete Selected** on the menu bar. Click **OK** to confirm the deletion.



Expressions

Introduction

Expressions are customizable **conditions** which allow users to extend different aspects of the marketing system. Expressions are essentially XML statements that enable you to create custom promotions, customer segments, and policies. The various parts of the marketing system - *Promotions*, *Customer*

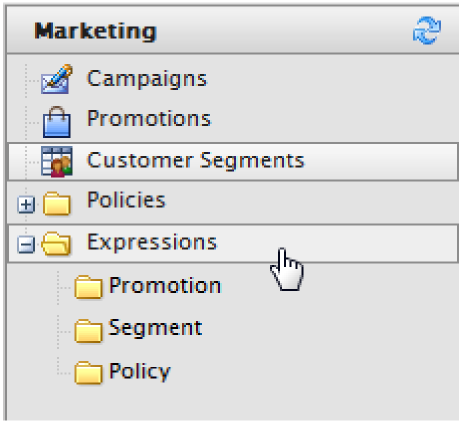
Segments and *Policies* all rely on expressions. As an example, if you want to set up a promotion like "40% off Item X", the expression or condition to enable this promotion would include: "Catalog ID for Item X and Reward of 40%".

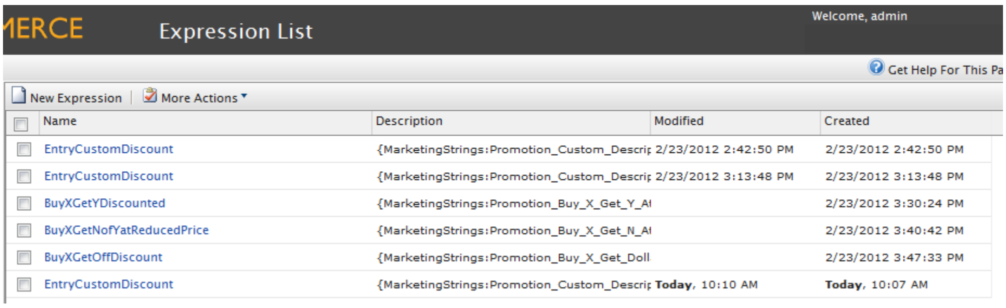
Because of the powerful features of this function, creating expressions should only be done by advanced users of EPiServer Commerce. In order to create an expression, knowledge of XML is required.

Creating an Expression

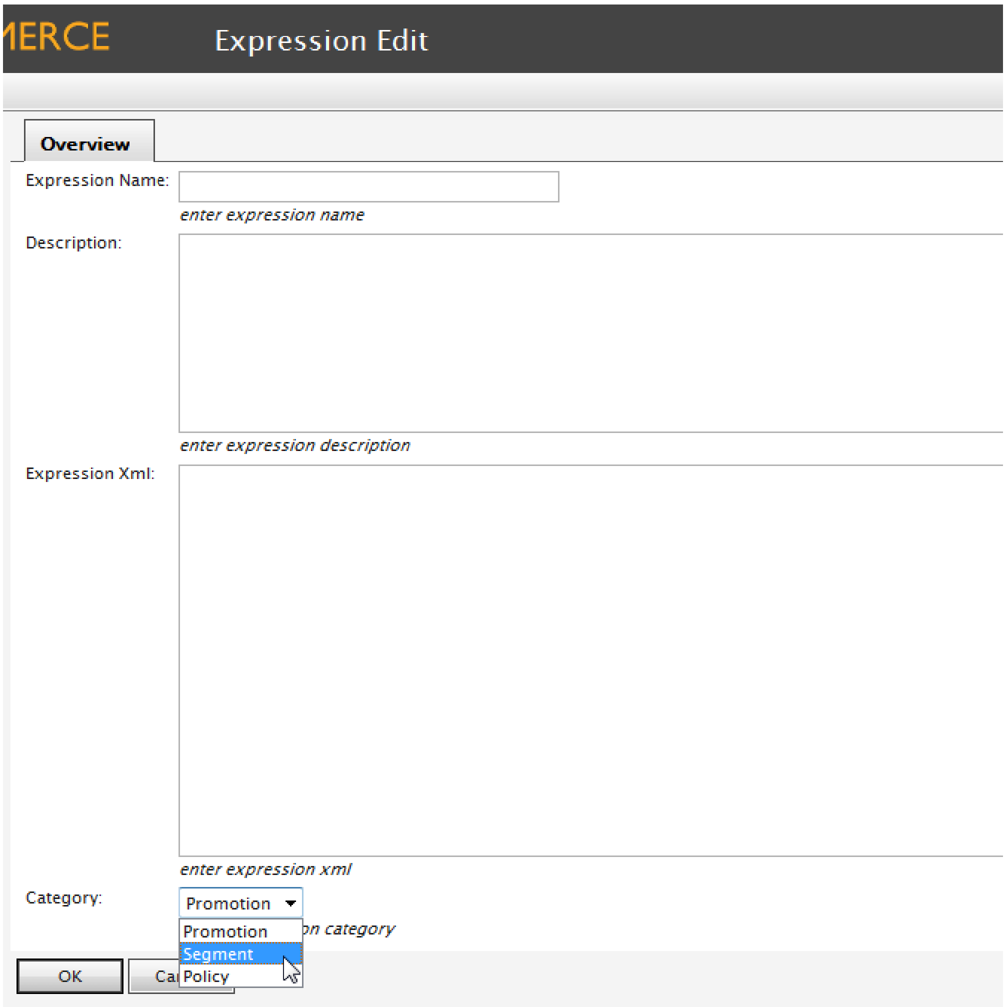
Do the following to create an expression:

1. Go to **Marketing** under and select **Expressions** .
2. Expand **Expressions** and **Promotions/Segment/Policy** to view the **Expression List** page.

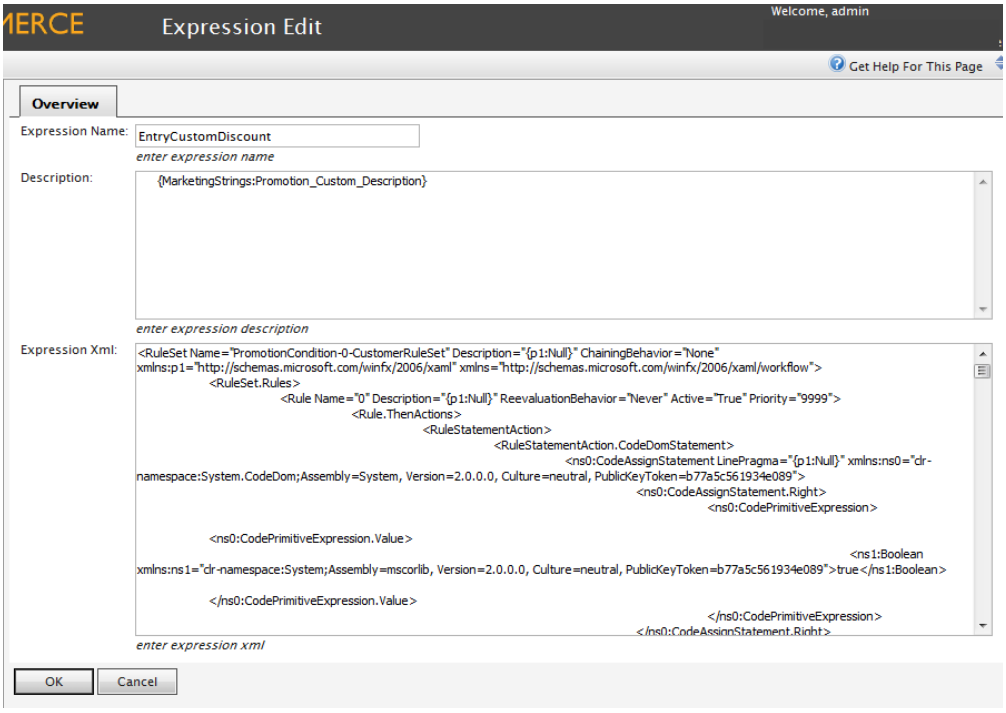




3. To create a new Expression, click on **New Expression**. The **Expression Edit** page appears.
4. Enter an **Expression Name**, such as "EntryCustomDiscount."
5. Enter a **Description** of the Expression.
6. Enter the **Expression XML**.
7. Under **Category**, select from the drop-down whether this Expression is for a "Promotion," "Segment," or "Policy." Depending on your selection, the expression will appear under those respective folders.


IERCE
Expression Edit
Overview
Expression Name:
enter expression name
Description:
enter expression description
Expression Xml:
enter expression xml
Category:
Promotion
Promotion
Segment
Policy
on category
OK
Ca

8. Click **OK** to save changes.



Policies

Introduction

Policies are business rules on how to eliminate similar promotions for the same order or same product. Policies are always executed when *Promotions* are applied and can be pre-configured for each store. Policies can be optionally associated with one or more promotion groups.

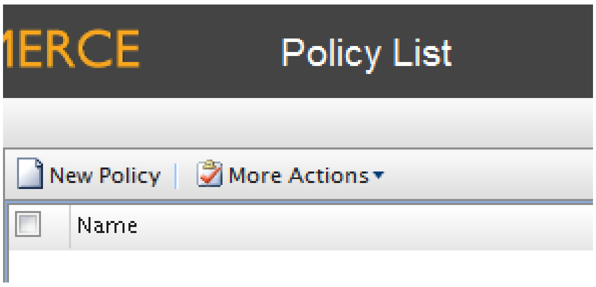
If a policy is associated with a promotion group, it is considered a **local policy**, and applies only to those promotions in the group to which this policy is associated. If a policy is not associated with a promotion group, it is considered a **global policy** which applies to all promotions. This allows a marketing manager to declare rules just once for the whole site. An example of a rule can be for instance "Do not allow negative orders".

> Because of the powerful features of this function, creating policies should only be done by advanced users of EPiServer Commerce.

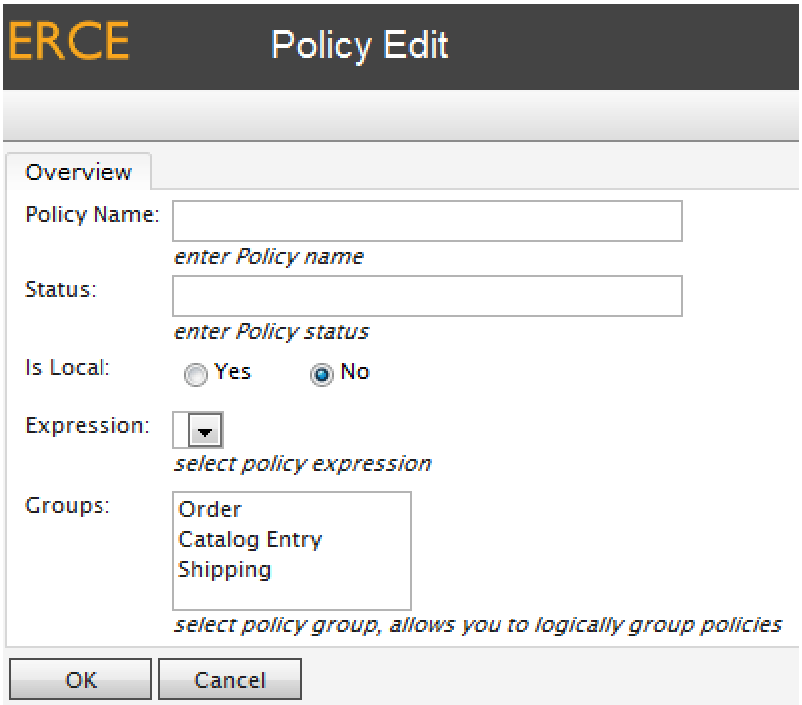
Creating a Policy

Do the following toe create a policy:

1. Go to **Marketing** and **Policies** to open the **Policy List**.



2. Click on **New Policy** to open the **Policy Edit** page.
3. Enter a **Policy Name**.
4. Enter the **Status** of the policy.
5. Select "Yes" or "No" to set the policy **Is Local**.
   a. **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.
   b. **Policy Is Local is Yes** - this means this policy is part of a promotion group and is applicable only for that promotion group.
6. Select an existing **Policy Expression** from the drop-down menu.
7. Select from the **Groups** list to place the policy under.
8. Click **OK** when done.



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.

Assets

Introduction

Files or "assets" as they are also referred to, are used for a variety of purposes including within the site's design, as details for products sold, or even as products themselves available for download. Typically assets are images or videos for product and content display, or PDF documents which can be associated with specific products or content.

In EPiServer Commerce, assets can be managed both from the **Assets** subsystem in Commerce Manager, as well as from the **File Manager** inside EPiServer CMS. These parts are fully integrated and synchronized, so any assets you add from either side will be visible from the other.

Working With Assets

File and asset management includes the following tasks:

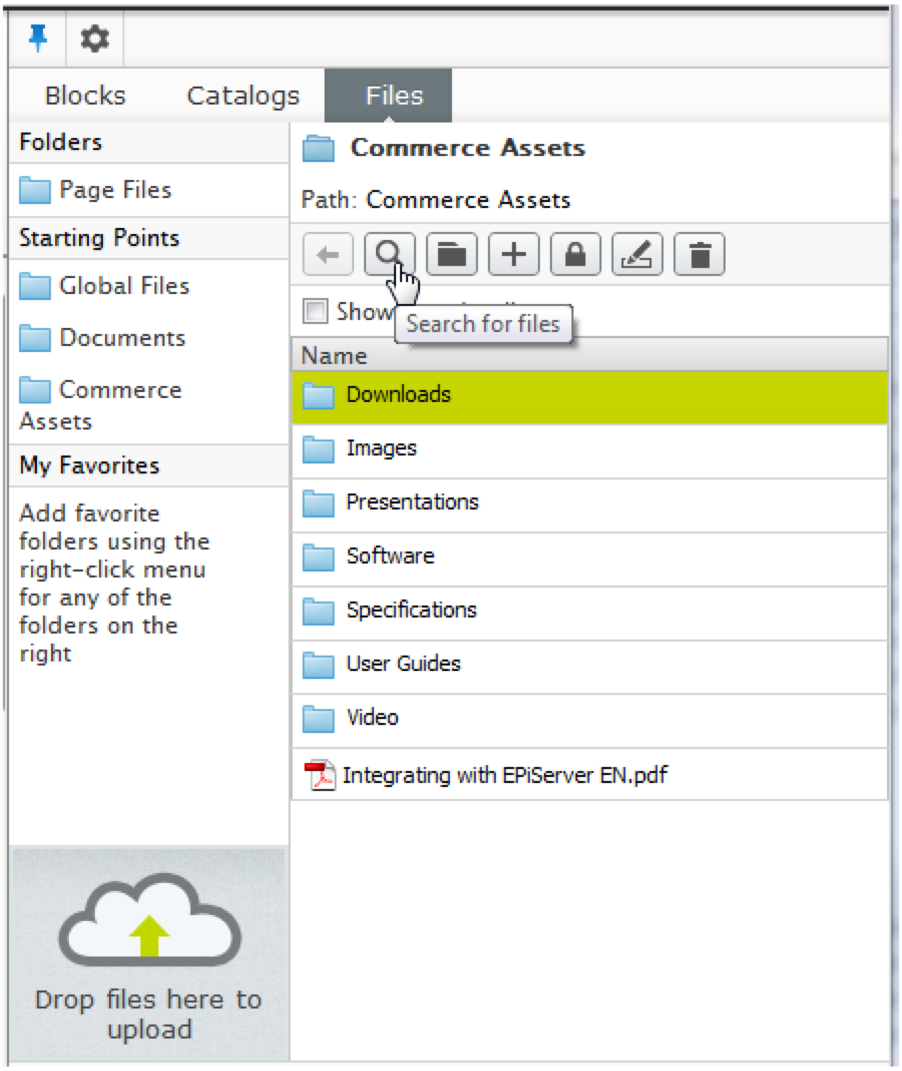
- Searching for files
- Creating folders
- Uploading files
- Setting access rights for folders
- Renaming files and folders
- Deleting files and folders
- Editing files

Find out more about how to work wit assets from either the *File Manager from CMS*, or the *Assets Management* subsystem inside Commerce Manager.

File Manager

Introduction

This section describes how to work with files (assets) from EPiServer CMS. The **File Manager** in the EPiServer Commerce sample site is available in the right-hand area when in Edit view. You will see the starting points that have been configured for the website. The sample site will have the **Global Files**, **Documents** and **Commerce Assets** starting points, with a set of sub-folders. You can define your own folder structure and configure additional starting points for your website.



In the following we will provide an overview of the features of the file manager. For a more detailed description of file management in EPiServer, refer to the *user documentation for EPiServer CMS*.

Searching for Files

Click the **Search** button in the file manager menu to **search for files** in the file manager. The search can be limited to specific folders in the structure.

Creating Folders

Click the **Folder** button in the file manager menu to **create a new folder**. To create a sub-folder, double-click the folder under which you want to add a sub-folder.

Uploading Files

Click the **Add** button in the file manager menu to **add files** to a folder, or use the quick upload option under **Drop files here to upload** in the lower left part. Multiple files can be uploaded with both options.

Setting Access Rights for Folders

Click the **Access rights** button in the file manager menu to **change access rights** for a folder. Double-click the folder to which you want to apply access rights, and then select users and groups as desired. Folders that users do not have access to will not be visible in the structure.

Note that the **Everyone** group must have read access to any images that you want to be publicly visible on the website.

Renaming Files and Folders

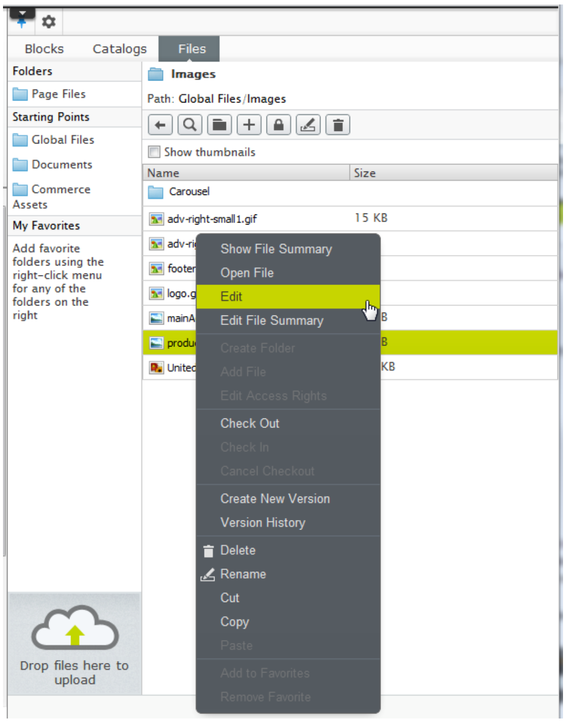
Click the **Rename** button in the file manager menu to **rename** a selected file or folder. When renaming a file, any pages linking to the file will be listed, and the link will be updated.

Deleting Files and Folders

Click the **Delete** button in the file manager menu to **delete** a selected file or folder. When deleting a file or a folder, any pages linking to the file will be listed.

Editing Files

Select the file you want to edit, right-click and select the desired option in the right-click menu. You can open the file for **editing**, or you can view and edit the **file summary**. You can also check out the file for editing, if this has been activated in the file manager. Refer to the user documentation for EPiServer CMS for more information.



Asset Management

This section describes how to work with files (assets) from **Asset Management** in Commerce Manager. The **Asset Management** system allows for assets including images, MP3s, PDFs, software packages and other downloadable files to be centrally stored and displayed on the website.

You can also work with assets from the *File Manager in EPiServer CMS*.

Browsing Assets

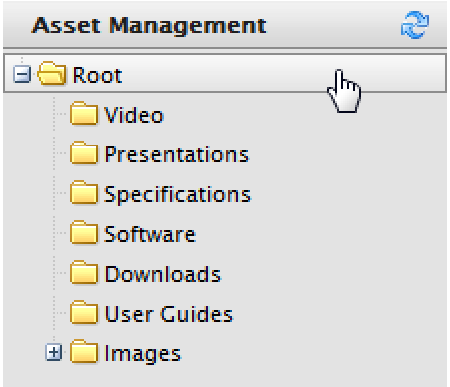
Introduction

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 folders can be edited or deleted and are simply placeholders for typical asset folders.

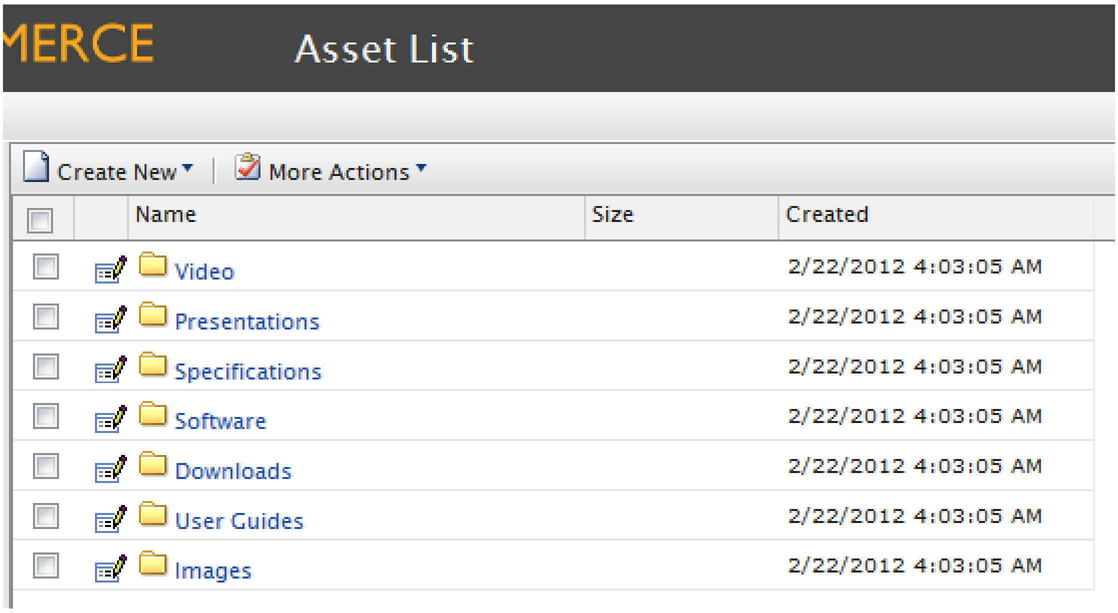
Browsing for Assets

Do the following to access existing assets in the system:

1. Go to Asset Management.
2. Click on **Asset Management > Root** and expand any of the folders below **Root**.



3. The **Asset List** shows folders and assets. The **Asset List** shows the total **Size** of the assets and the **Created** date. Expand the folders to view the content of each folder.



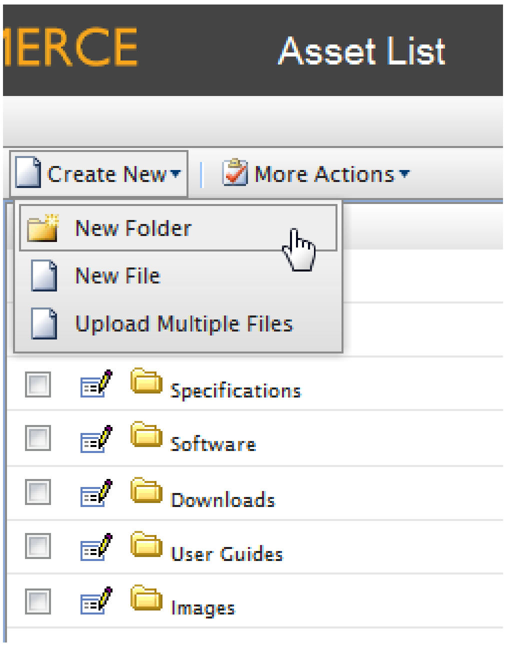
Creating Folders

Creating an Asset Folder

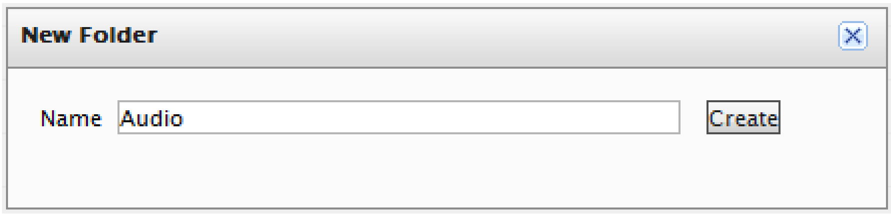
Do the following to create a folder for storing assets:

1. Go to the **Asset List** by clicking **Asset Management > Root** (or any folder underneath Root).

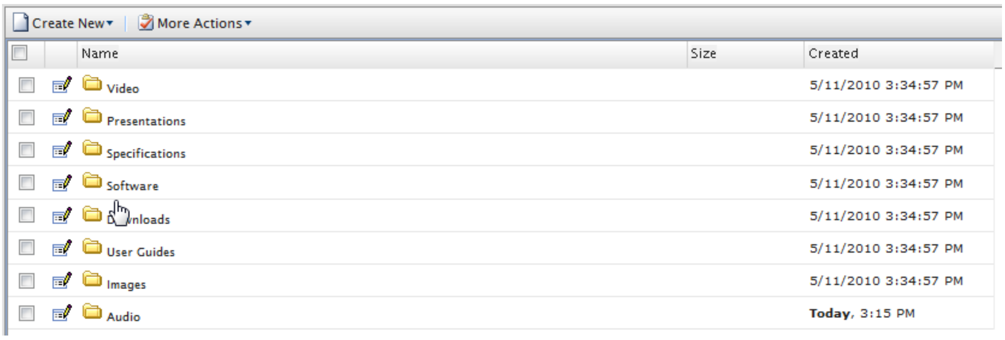
2. Click on **Create New > New Folder**.



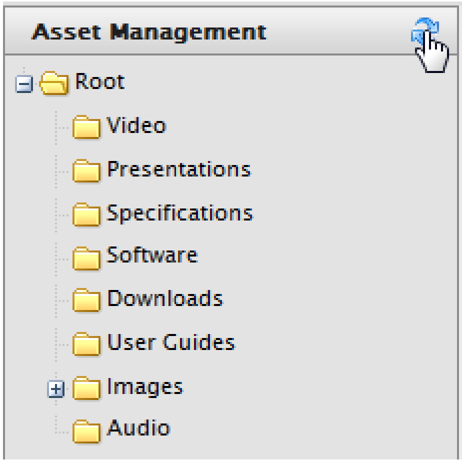
3. Enter a name for the folder and click **Create**.



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



5. 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 sub-folders underneath Audio (or any other existing folder).

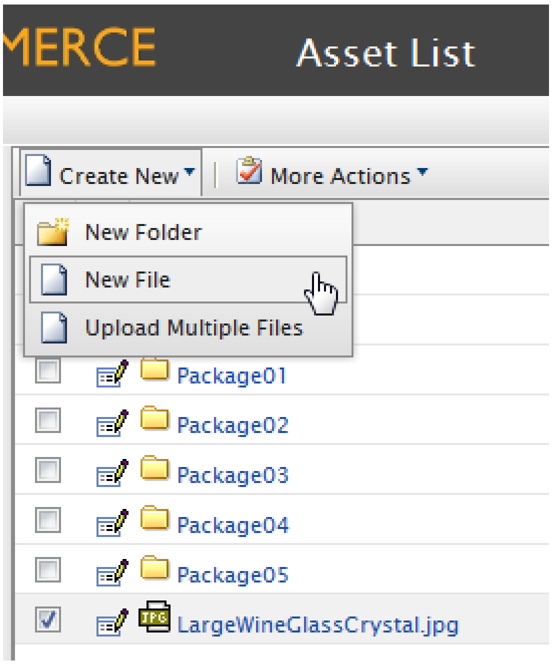


Uploading Asset Files

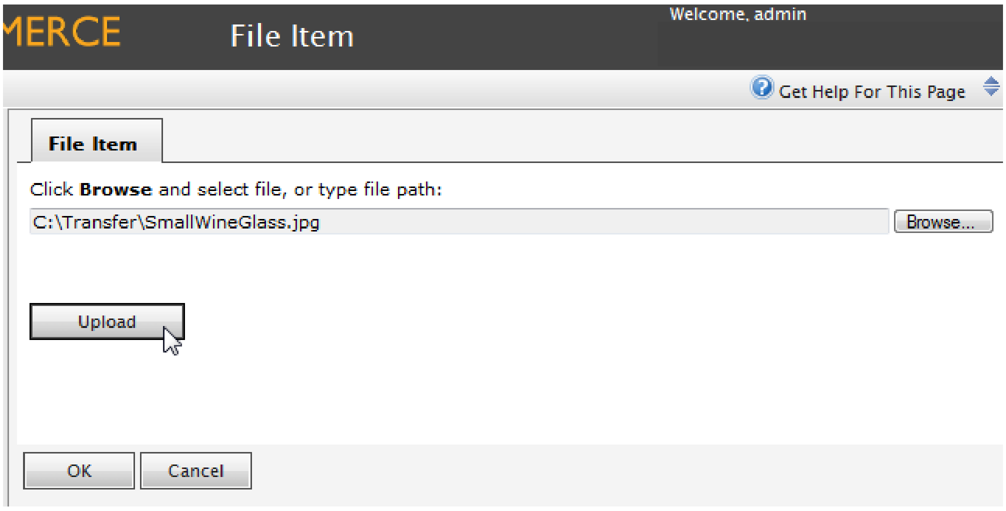
Uploading Individual Files

Do the following to upload a single file to the system:

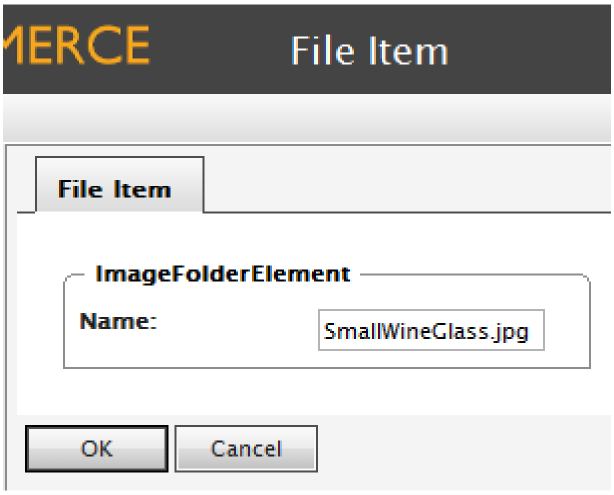
1. Navigate to the folder you want to upload the file to and then click on **Create New > New File**.



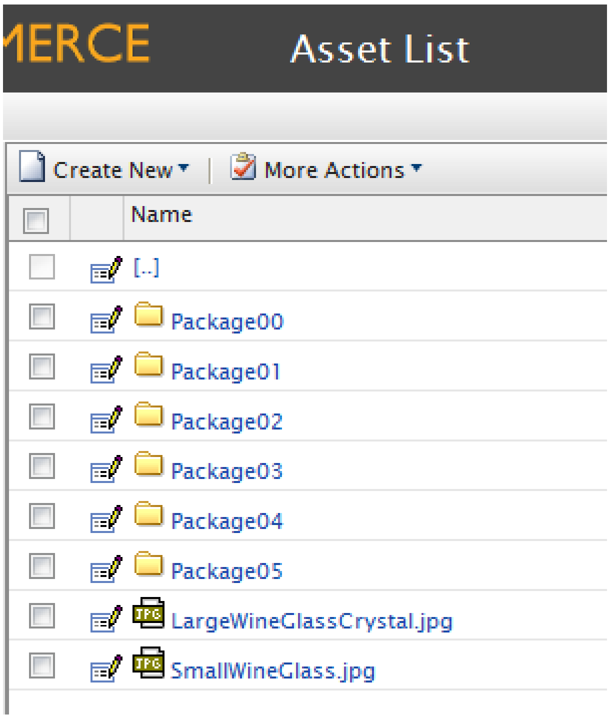
2. Click **Browse** or enter the file path into the field. Once done, click on **Upload**.



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



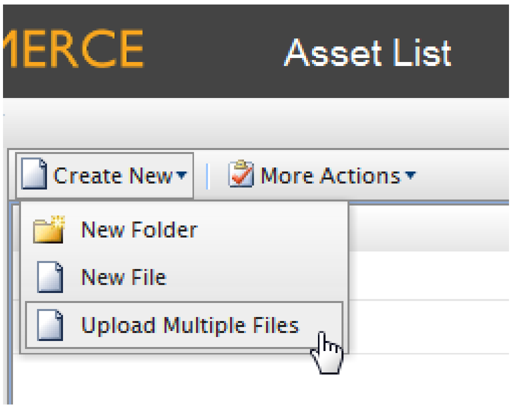
4. The File is now visible on the **Asset List** of the destination folder.



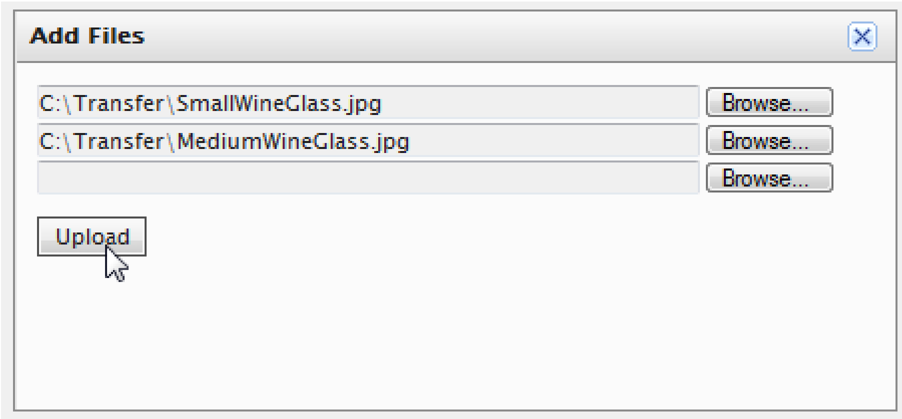
Uploading Multiple Files at One Time

Do the following to upload multiple files to the system:

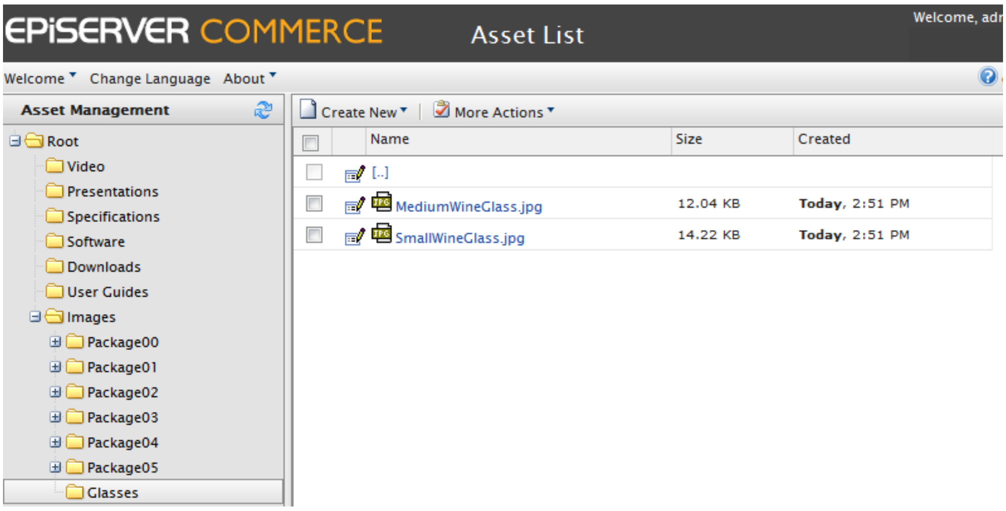
1. Click on **Create New > Upload Multiple Files**.



2. 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. One done adding files, click **Upload**.



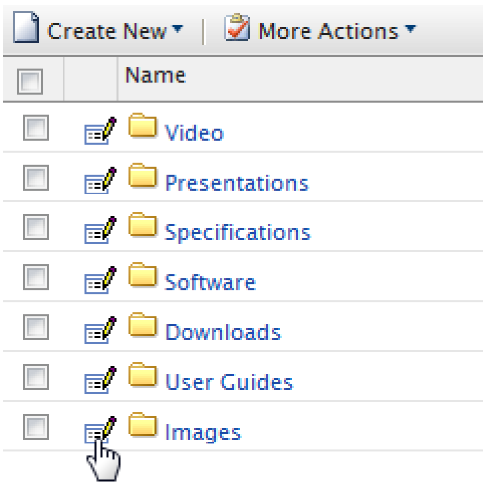
3. A progress bar window will pop-up, showing you the progress of the uploads. Once complete, the files will appear in the **Asset List**.



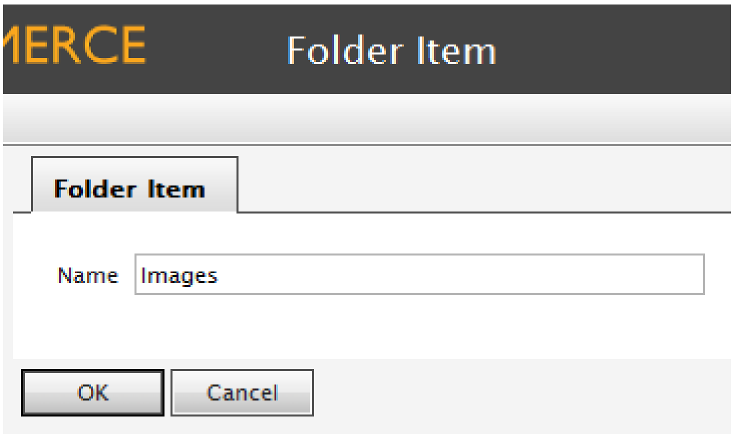
Editing and Deleting Folders and Assets

Editing Folder and Assets Names

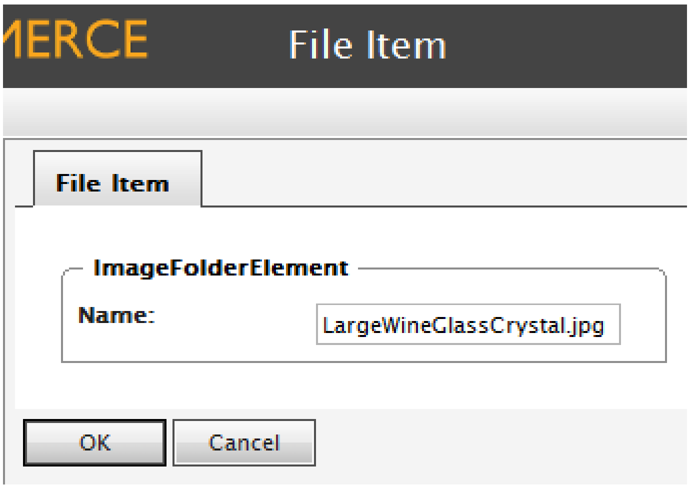
Folder and asset names can be edited by clicking on the **Edit** icon next to the **Name**.



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

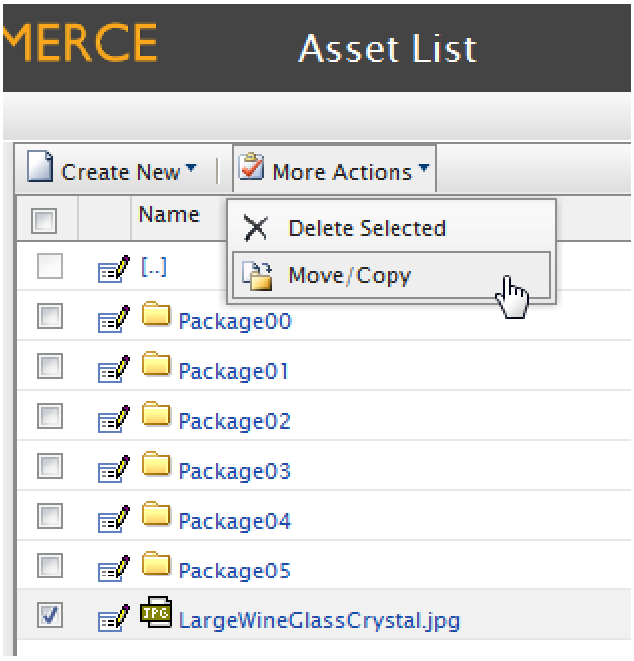


If you are editing an asset such as an image, the **File Item** page appears, allowing you to edit the name as well.

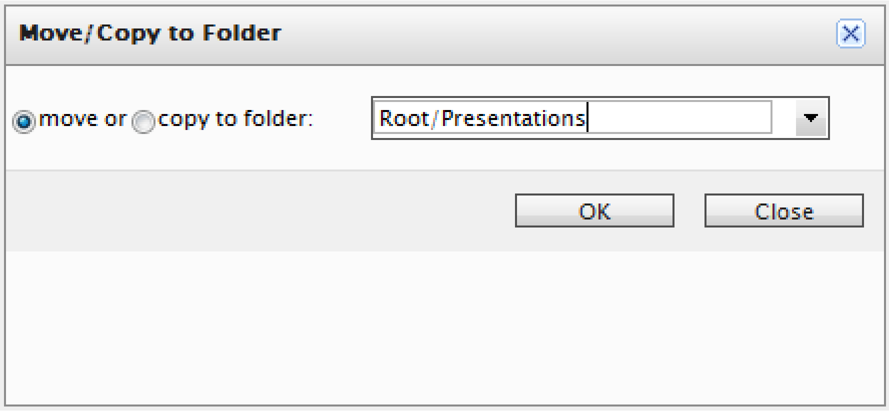


Copying/Moving Folders and Assets

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**.

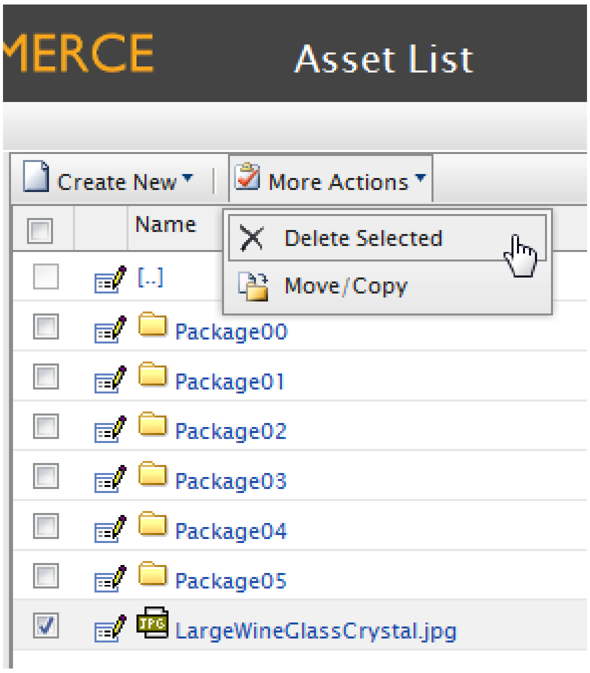


The **Move/Copy to Folder** pop-up appears. You can select to "move" or "copy to folder." From the drop-down menu, select the destination. Click on **OK** to confirm.



Deleting a Folder or an Asset

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



Reporting

Introduction

Reporting offers some common type reports out-of-the-box, intended to be used as a support tool for e-commerce managers.

The default reports include:

- **Sales Report** - an overview of the website sales performance over a period of time.
- **Shipping Report** - the shipping method, number of orders and total shipping cost over a period of time.
- **Best Sellers Report** - shows which products are sold the most in terms of quantity and total revenue over a period of time.
- **Low Stock Report** - shows 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 filtered by date and time*, and the reports can be exported to Excel or PDF format, or printed.

You can also develop your own customized reports, refer to the EPiServer Commerce *Developer Guide* for more information on how to work with reports to extend the functionality.

Working With Reporting

The work with reports includes the following tasks:

- *Generating various reports* based on e-commerce data such as sales quantities, order numbers, shipping costs and inventory stock status.
- Filtering the view for displaying data for the desired time intervals.
- Exporting reports to various outputs such as Excel, PDF or print.

About SQL Reporting Services

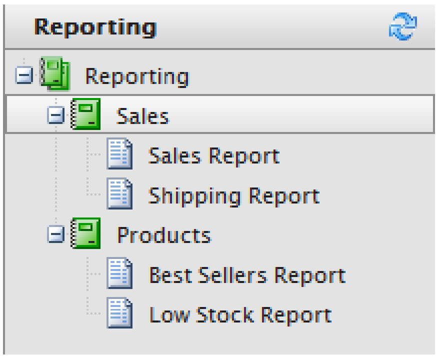
Since EPiServer Commerce utilizes SQL databases, custom reports can also be created using **Microsoft SQL Server Reporting Services**. Reporting Services provides a complete, server-based platform designed to support a wide variety of reporting needs enabling organizations to deliver relevant information where needed across the entire enterprise.

Refer to the *technical documentation for SQL Reporting Services* for more information on how to work with this together with EPiServer Commerce.

Generating and Exporting Reports

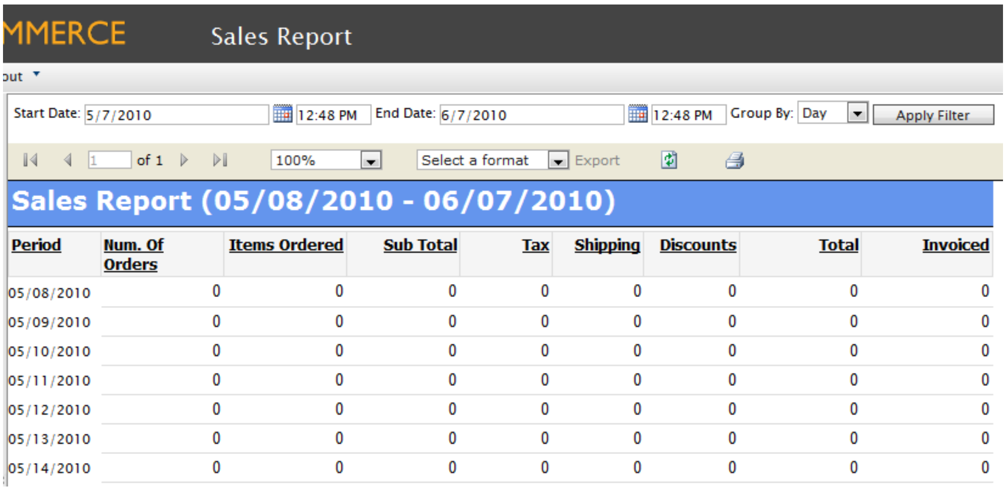
Introduction

Reports for **Sales**, **Shipping**, **Best Sellers**, and **Low Stock** information can be generated by default. Data can be customized and filtered and the final report can be exported to different formats. Reports are managed under the **Reporting** option in the left menu.



Generating a Report

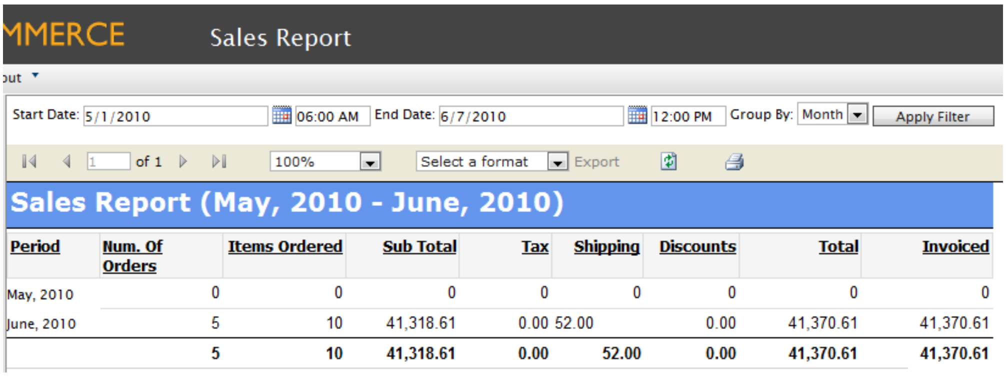
To generate a report, click on **Reporting** and select one of the default reports available under **Sales** and **Products**: **Sales Report**, **Shipping Report**, **Best Sellers Report** or **Low Stock Report**. The report display will be generated.



Filtering Report Data

To filter the data displayed, select the **Start Date** and **End Date** ranges and time. You can also group the report data by "Day," "Month" or "Year." Once done, click **Apply Filter**. To regenerate the report after changing the filtering, click the **reload** icon.

Below is an example of a **Sales Report** with a date range from 5/1/2010 at 6am to 6/7/2010 at 12pm **Grouped By Month**.



Exporting a Report

When the report has been generated it can be **exported** as a file for further processing.To export a report to a file, click on the **Select a format** option. By default reports can be exported either as Excel or PDF files. Select a format in the drop-down, click **Export** and **Open** or **Save** the file once the prompt appears. Reports can also be printed by clicking the **print** icon.

Administration

Introduction

In the **Administration** part you will configure and administer many of the system settings used in EPiServer Commerce. The settings configured here are both general settings used by the entire system, as well as settings used by specific parts of the system such as Catalog and Order management.

The various configuration options are available from the **Administration** part of Commerce Manager.

Working With Administration

The work with system administration includes the following tasks:

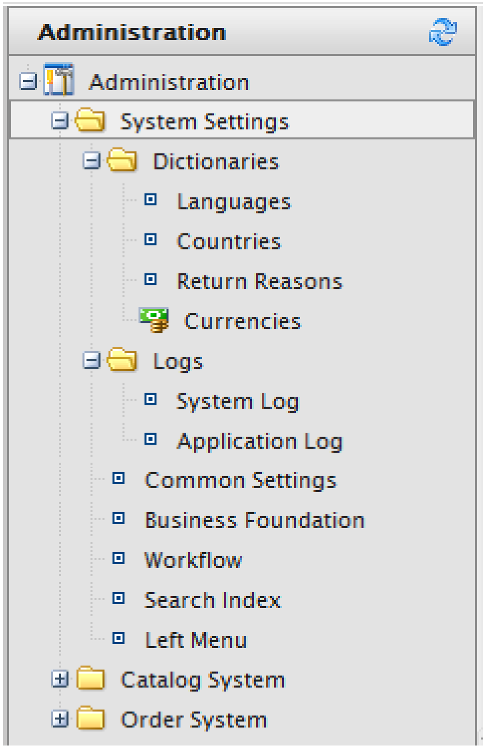
- Adding new *languages*, *countries*, *currencies* and *return reasons* to the e-commerce system, which is done through so called *Dictionaries*.
- Tracking changes and monitoring system activities through the *log features*.
- *Configuring common settings* such as default language, currency, and length and weight units to be used by the system.
- *Customizing*, *creating* and *publishing business objects* in order to extend the attributes of the Customer and Asset Management systems, providing more flexibility for fields and attributes displayed and collected.
- Define and activate new customized *workflows* after they have been set up in code.
- *Updating the search index* for the website to reflect changes to the product catalog.
- *Customizing the left menu* by adding your own menu items.
- Defining *warehouses* and *tax categories*, as well as *meta classes and meta fields* to be used by the *Catalog Management* system.
- Defining *payment gateways* and *shipping methods and providers*, as well as *configuring taxes* used by the ***Order Management*** system.

Refer to the *EPiServer Commerce Developer Guide* for more detailed technical information about configuration settings.

System Settings

System Settings includes functionality for adding default system settings for language, currency, units and meta data fields and classes, as well as many other general configuration possibilities.

The features can be accessed by selecting **System Settings** under **Administration**.



In this section we will describe how to work with the options under **System Settings**.

Dictionaries

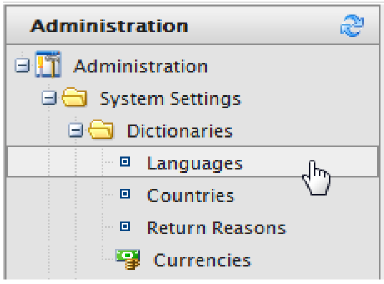
In EPiServer Commerce, **dictionary values** are used for defining languages, countries and currencies used in the e-commerce process, as well as your own defined return reasons used in order management.

This section explains how to add *Languages*, *Countries*,*Currencies* and *Return Reasons* to EPiServer Commerce.

Adding Languages

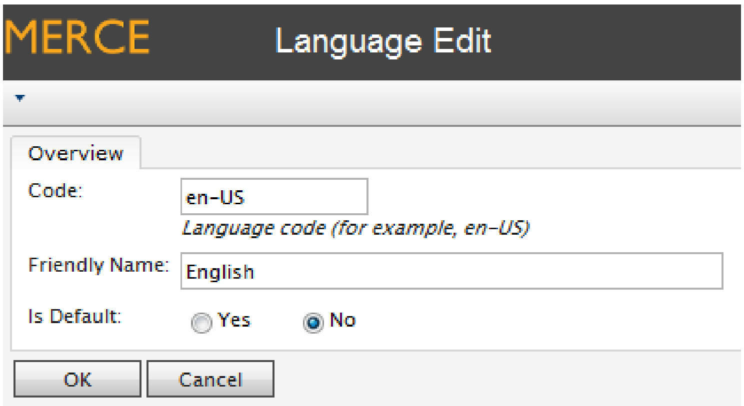
By default English, German, Spanish, and French are available.

To add a new language, login to Commerce Manager and go to **Administration --> System Settings --> Dictionaries --> Languages**.



Click **New Language** and fill in the following:

- **Language Code** - to obtain the correct **language** code, go to the *MSDN site Table of Language Culture Name, Codes, and ISO Values Method [C++]*.
- **Friendly Name** - this name is displayed in the front-end site language drop-down and various Commerce Manager admin pages.
- **Is Default** - Yes/No.

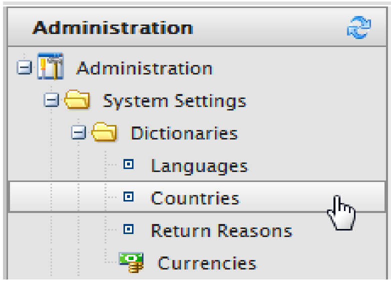


Click **OK** to save the language.

Verify in the **Default Language** field under *Common Settings* that the new language is selectable from the menu.

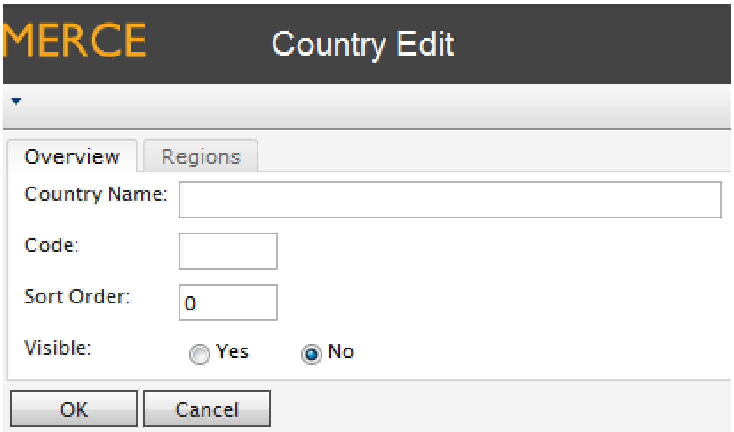
Adding Countries

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:

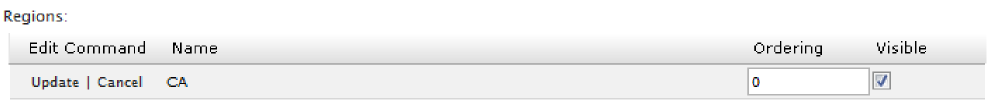
- **Country Name** - this is the friendly name that is displayed in the public site during the checkout process
- **Code** - to obtain the correct **country** code, go to the *MSDN site Table of Country/Region and State/Province Names and Codes [C++]* (use the ISO Short Code or ISO Long Code as long as you remain consistent).
- **Sort Order** - enter a number starting from 0 (the lower number is listed on the top of the drop-down)
- **Visible** - Yes/No.



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

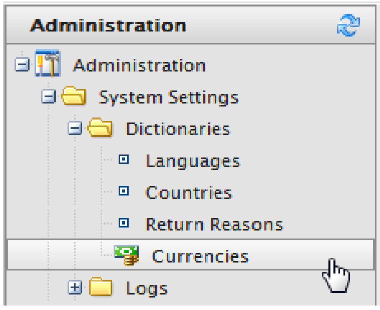
- Type a **Friendly Name** (e.g. CA - this will be displayed in the public site during the checkout process) and click **Add**. You can checkmark it either as **Visible** or not on the public site

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



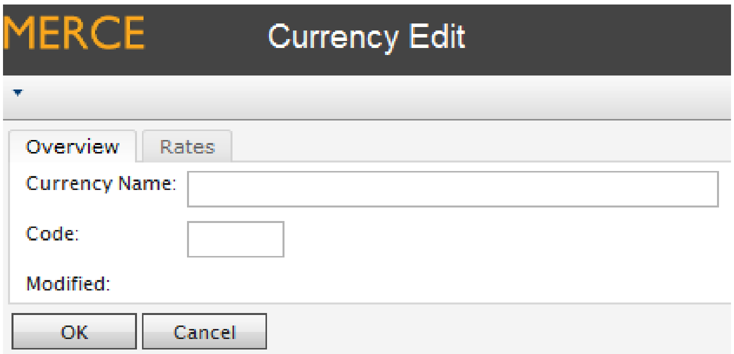
Adding Currencies

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 administration pages.
- **Code** - currency codes can be obtained from *http://en.wikipedia.org/wiki/ISO_4217#Active_codes.*

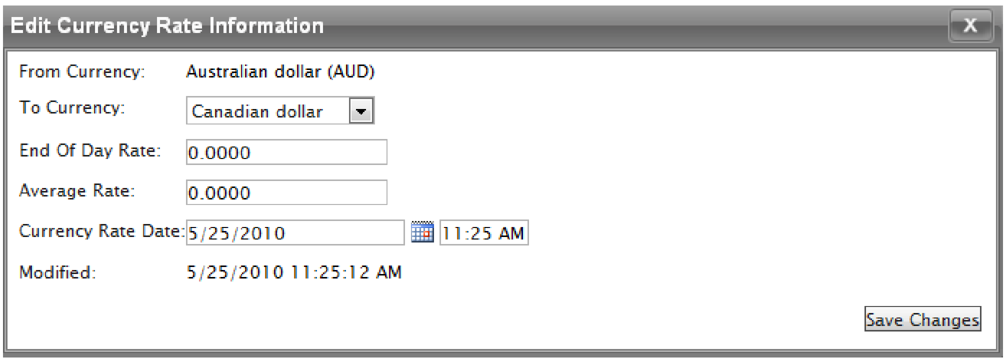


In the **Rates** tab, you can **Add Rates** which are the foreign exchange rate when you want to convert from one currency to another.

In the **Edit Currency Rate Information** dialog enter the following:

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

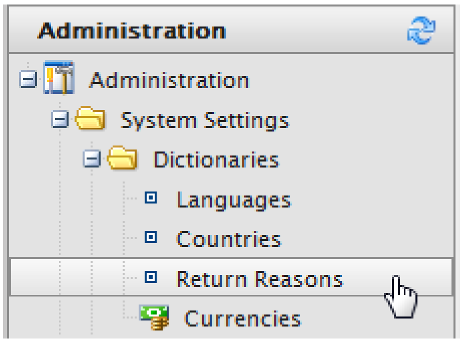
Click **Save Changes**.



Managing Return Reasons

Introduction

Out of the box, the three **return reasons** in EPiServer Commerce are "Faulty," "Incorrect Item," and "Unwanted Gift." More return reasons can be added or customized so that when a Customer Sales Representative (CSR) processes a return, more return reasons are available via the drop-down menu.



Creating a New Return Reason

1. To add a new return reason, go to **Administration > System Settings > Dictionaries > Return Reasons**. The **Return Reasons** screen appears.
2. Click **New Return Reason**. The **Return Reason Edit** screen appears.
3. Once done, click **OK**. The new return reason appears on the list.

Field	Description
Return Reason	Enter a friendly name, such as "Changed Mind".
Sort Order	The lower the value, the higher the position the return reason is on the list screen.
Visible	Select Yes (to enable to return reason) or No (to disable it).

Editing and Deleting a Return Reason

- On the **Return Reasons** list, click on the **Edit** icon. Make any edits to the Return Reason name, Sort Order, and its Visibility and then click **OK** to save your changes.
- To delete an individual Return Reason, click on the **Delete** icon. To delete multiple return reasons at one time, check-mark the box next to the Return Reason and then click **More Actions > Delete Selected**. Confirm your selection by clicking **OK**.

Logging

Introduction

Logs contains the system log and application log. These logs track the activities of made within the EPiServer Commerce system. This is useful for troubleshooting purposes and if you want to track events and changes in the system during a specific time period.

In the database, the logs are recorded in the dbo.ApplicationLog table. For details on how to set up and configure the logging features, refer to the *Developer Guide for EPiServer Commerce*.

The log features are available under **Administration**, **System Settings** and **Logs**, in the left column.

System Log

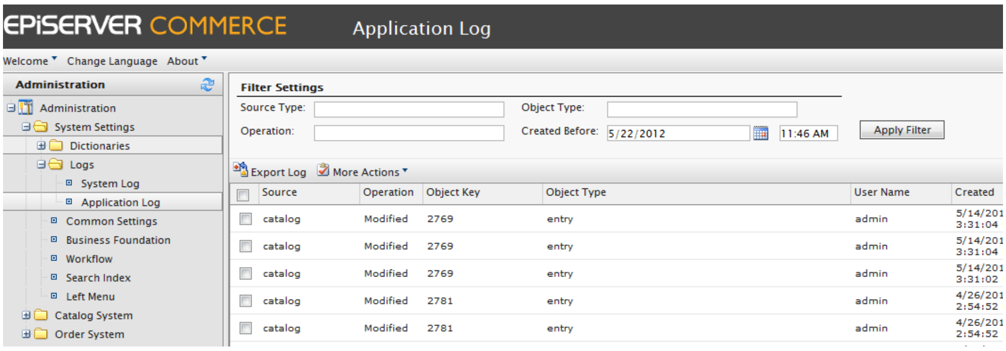
The **System Log** keeps a detailed track of system-related activities within EPiServer Commerce. Here is where you would be able to view any errors that occur in the system as well to find out more details about it.

You may filter these logs to show more detail by filtering by **Operation**, **Object Type**, or the **Created Before** date and time and clicking **Apply Filter**. You may also use **Export Log** for your records after you have filtered for the desired data. The **More Actions** drop-down includes options to **Delete Selected** or **Delete All** to remove log items.

Application Log

The **Application Log** by default tracks changes made in the *Catalog Management system*. For example, when you add a SKU to a catalog, it gets logged here. This is the default behavior of the application log and can be configured and extended to track and log other sources as well.

You may filter these logs to show more detail by filtering by **Source Type**, **Operation**, **Object Type**, or the **Created Before** date and time and clicking **Apply Filter**. You may also use **Export Log** for your records after you have filtered for the desired data. The **More Actions** drop-down includes options to **Delete Selected** or **Delete All** to remove log items.



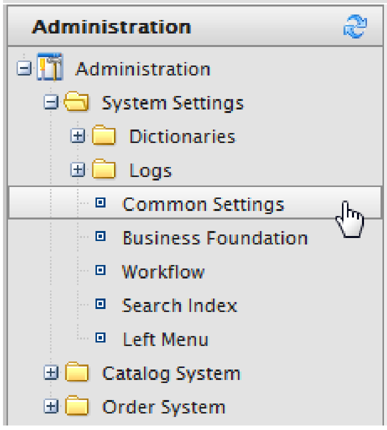
Configuring Common Settings

Introduction

Under **Common Settings** you are able to select your default language, currency, length unit, and weight unit. When the defaults are set and saved, parts of Commerce Manager where you select the language, currency, length unit, and weight unit default to those settings.

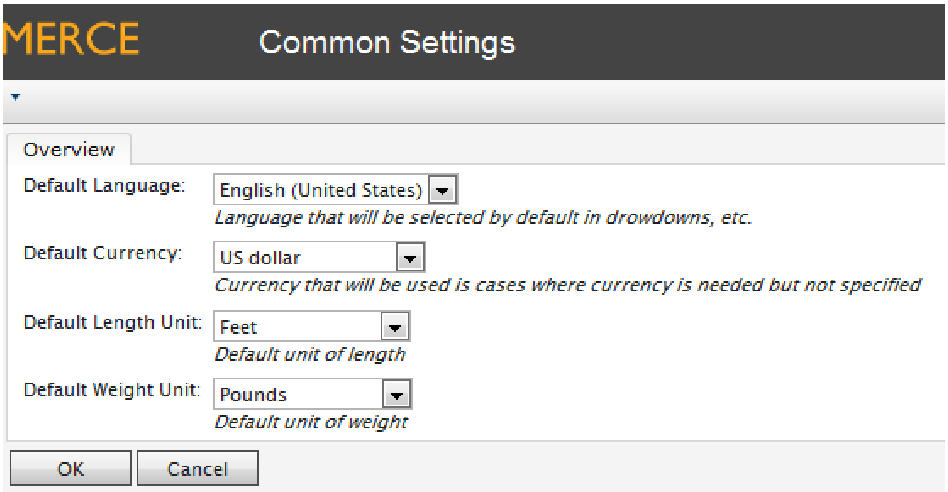
Defining Languages, Currencies and Length/Weight Units

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



Out of the box, you have the following options:

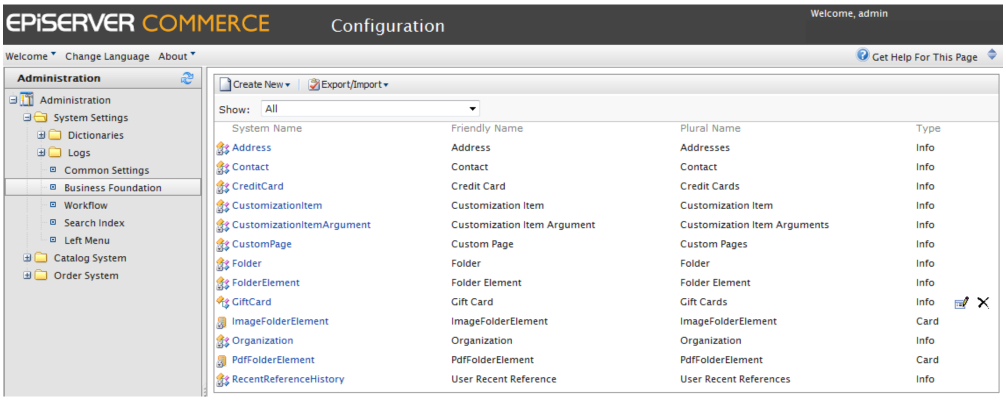
- **Language** - English, German, Spanish, French.
- **Currency** - US dollars, Canadian dollars, Euros, Yen, Pound sterling and many others.
- **Length units** - meters, feet.
- **Weight units** - kilograms, pounds.



Click **OK** to save your changes.

Business Foundation

Business Foundation allows you to extend the attributes of the Customer and Asset Management Systems to give you move flexibility on the fields and attributes displayed and collected. Business Foundation works with the meta data engine to allow no-code customization of the data model. Using this you can define new objects and relations between them within the *Customer Management* and *Asset Management* systems.



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. Common examples of how users leverage Business Foundation are setting a standard height and width for an image file uploaded to the Asset Management system, or creating a "Gift Card" field within the Customer Management system used to track how much a customer has left on their gift card.

The current implementation of Business Foundation only supports the Customer and Asset Management subsystems.

In the following we will describe how to work with the features in Business Foundation.

Creating Business Objects

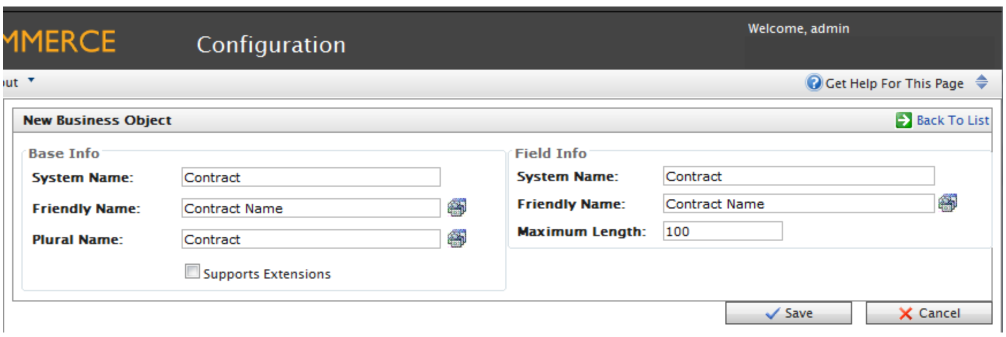
Introduction

Creating business objects allows users to extend customer and asset forms for tracking and relating different types of data. New business objects can be created to suits a multitude of business purposes. In this example we will describe how to create a "Contract" business object.

Creating a Contract Object

Do the following to add a contract business object:

1. Go to **Administration**, expand **System Settings**, and click on **Business Foundation** to access the **Business Foundation Configuration** page.
2. Click **Create New** and select **New Business Object**. The **New Business Object** dialog appears.



Enter information as described below.

Base Info

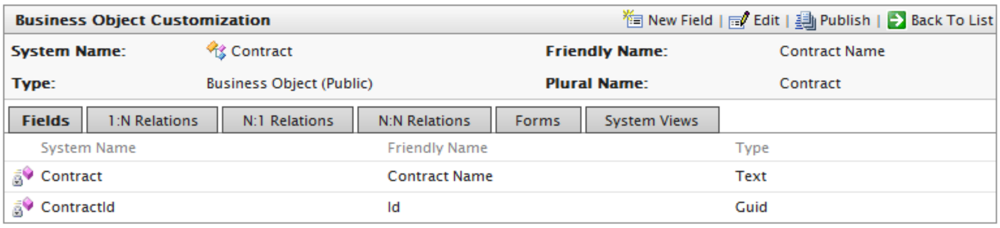
- **System Name**: name of the Business Object (once you input a name, the Friendly Name and Plural Name fields are auto-populated).
- **Friendly Name**: alternative to the System Name.

- **Plural Name**: plural version of the system/friendly name for example 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 a system name.
- **Friendly Name**: enter a friendly, front-end name.
- **Maximum Length**: maximum number of characters allowed in this field.

3. Click **Save** to save the changes. You will now see the details of your newly created business object.



Next Steps

Add fields to the contract business object as needed, refer to *Adding Fields to Business Objects*. To further customize a business object, refer to *Customizing Business Objects*.

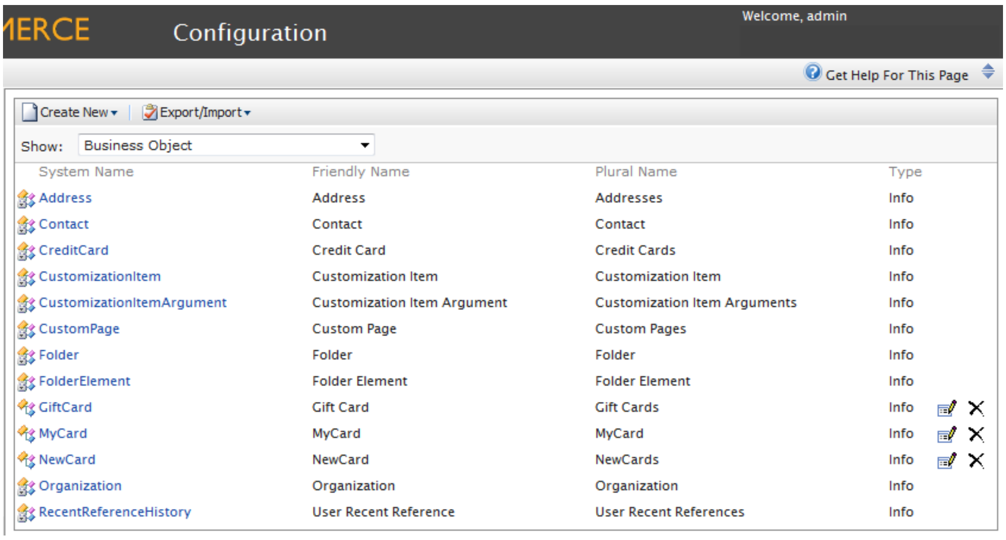
Customizing Business Objects

Introduction

A standard installation of EPiServer Commerce includes a number of business objects that can be edited and customized. Customizing existing business objects is a good starting point to model business objects for your needs.

Editing and Deleting Business Objects

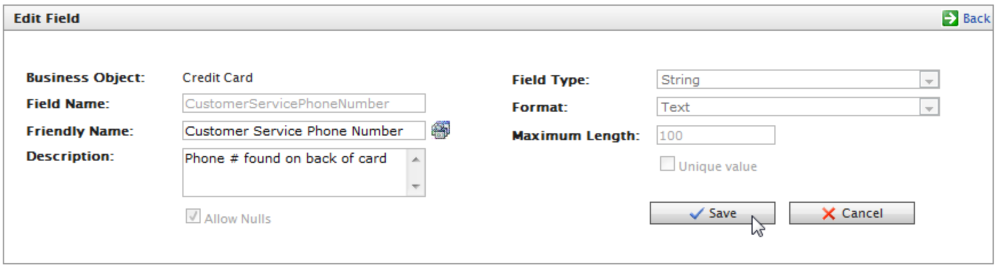
Many of the default business objects and related fields can be both edited and deleted but not all of them. For example, pre-existing business objects such as "Address" and "Organization" cannot be deleted, only edited. Business objects that can be edited and deleted will have an **Edit** and **Delete** icon next to them.



Editing and Deleting Fields of Business Objects

Fields that can be edited and deleted will have an **Edit** and **Delete** icon next to them.

Fields that are **locked** cannot be edited, for instance Field Name and Field Type in the image below.



Update the fields that are unlocked and click **Save** to save the changes to the business object.

Adding Fields to Business Objects

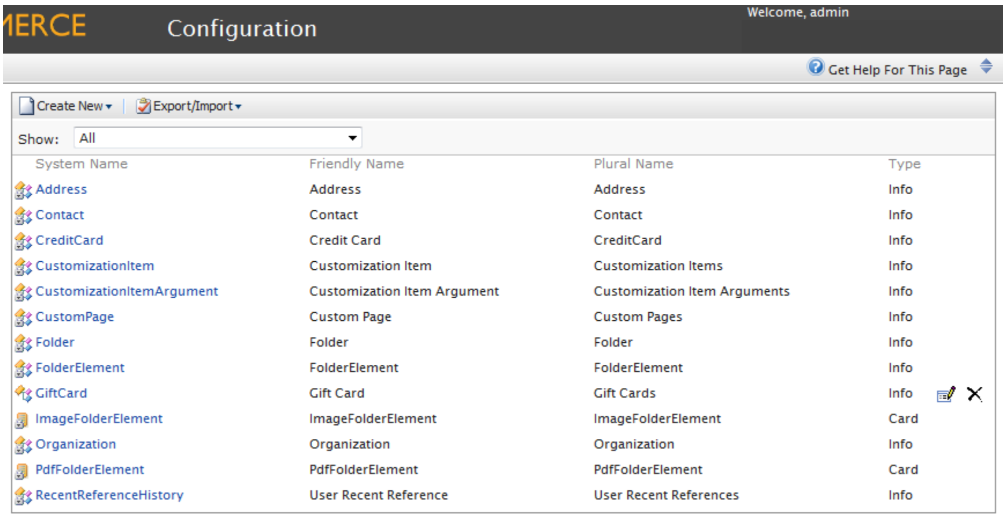
Introduction

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 into Commerce Manager.

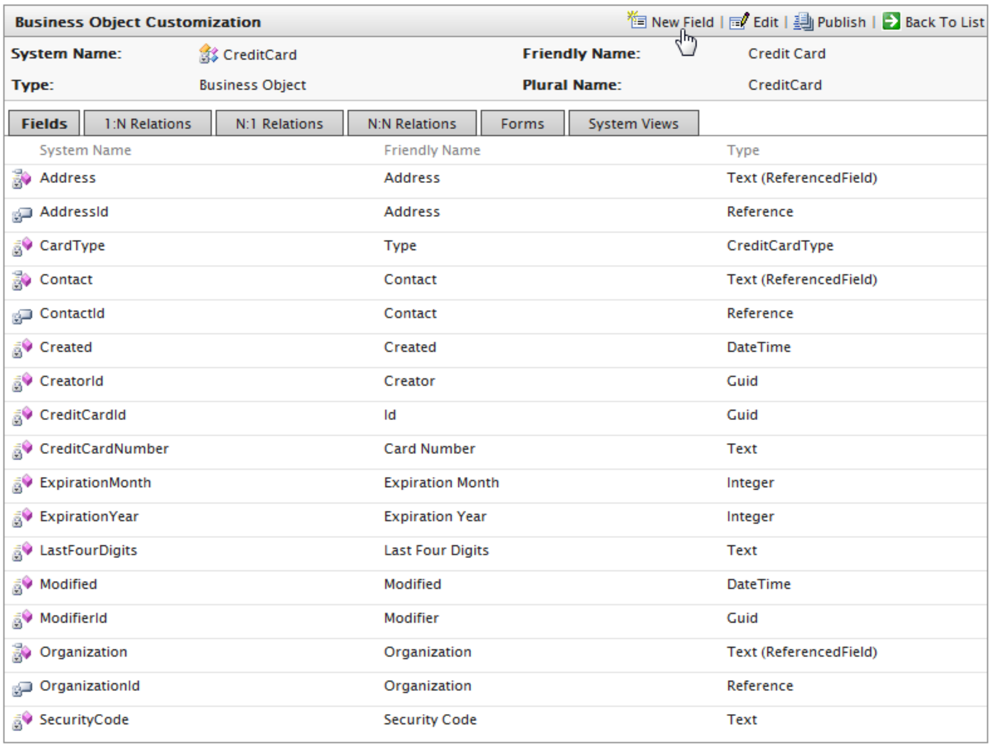
Adding Fields to a Business Object

Do the following to add fields to an existing business object:

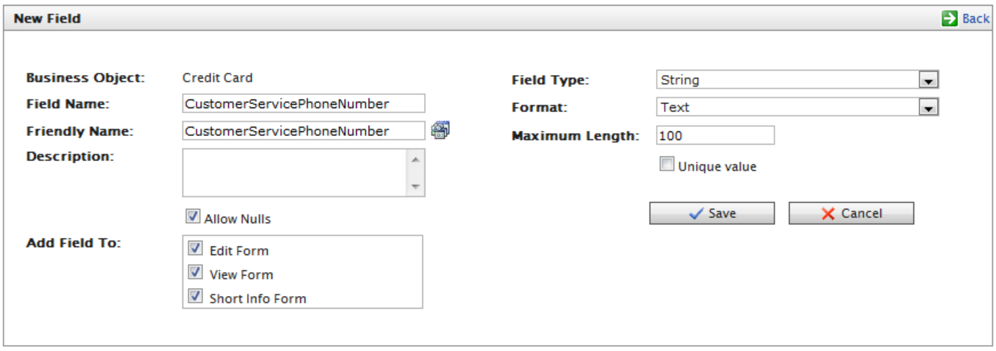
1. Click on **Administration**, expand **System Settings**, and click on **Business Foundation** to access the list of Business Foundation objects. In this example, the **CreditCard Business Object** is used.



2. Click on the business object in the list to open it for editing. To add a new field to the **CreditCard Business Object** (or any other Business Object), click on **New Field**.



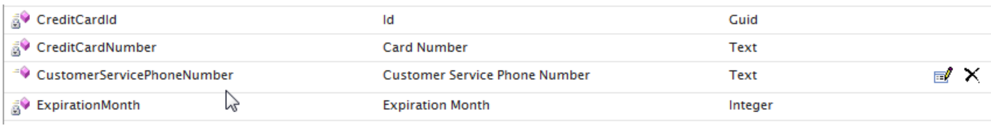
3. The **New Field** form allows you to specify the type of data field you want created for the business object.



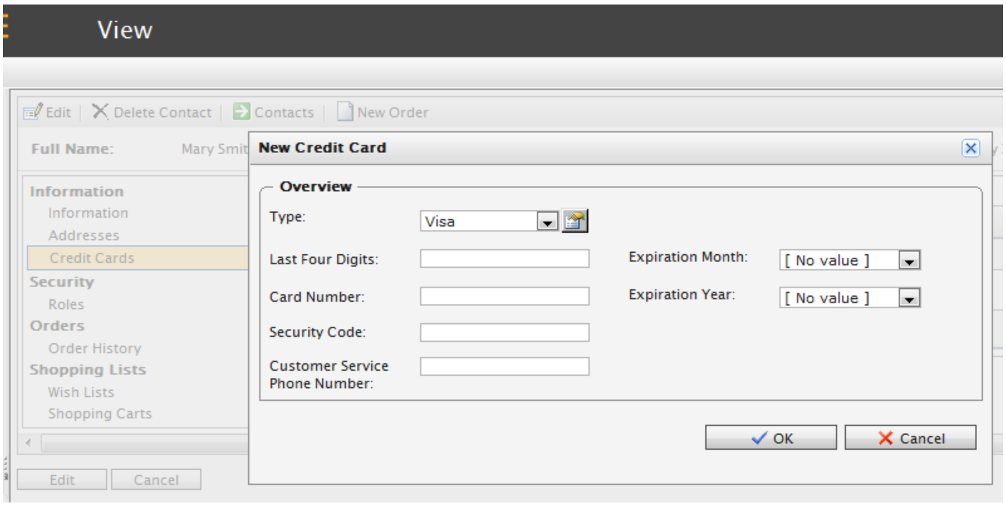
Enter a **Field Name**, which is the system ID or name of the field. The Field Name that is entered auto-populates the Friendly Name field.
Since the **Friendly Name** is auto-populated based on the Field Name, you can either keep the name the same or change it. The Friendly Name is what appears on a form (such as the Credit Card form).
You can optionally enter in a **Description** that appears below the data entry field to explain the field to the user.
Checkmark on or off to **Allow Nulls** for this field.
You can choose to **Add Field To** an existing Form. Checkmark all that apply.
Enter 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.
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.

4. Once done, click **Save**. The new field appears on the list of fields.



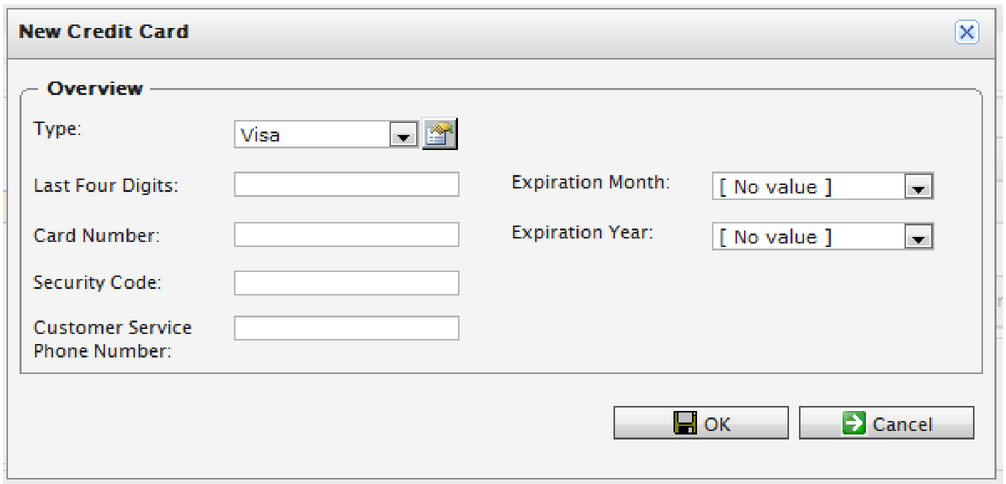
5. To verify if the new field appears, check the form associated with that new field. Since this example customized the **New Credit Card** form, you will see that the new field appears.



Customizing Forms

Introduction

Forms dictate how fields are presented to the EPiServer Commerce user when viewing and editing information in the system. Every field is associated with a **form**, and each business object is associated with one or more **types of forms**. Some common types of forms found are the Edit Forms, Short Info Forms, and View Forms. For example, the **New Credit Card** form looks like this:

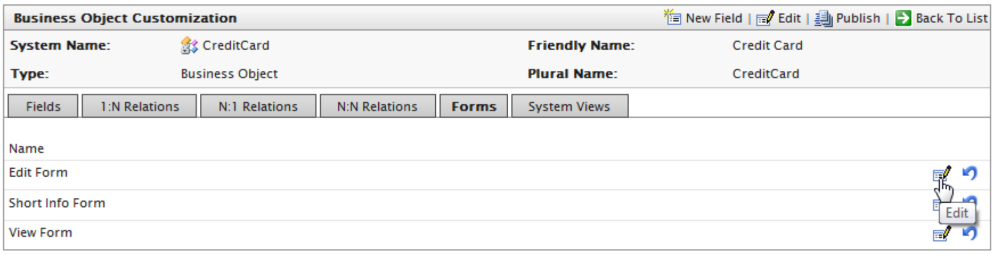


In this section we will describe how you can customize forms and adapt them to the specific needs of your EPiServer Commerce users.

Editing Forms

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.

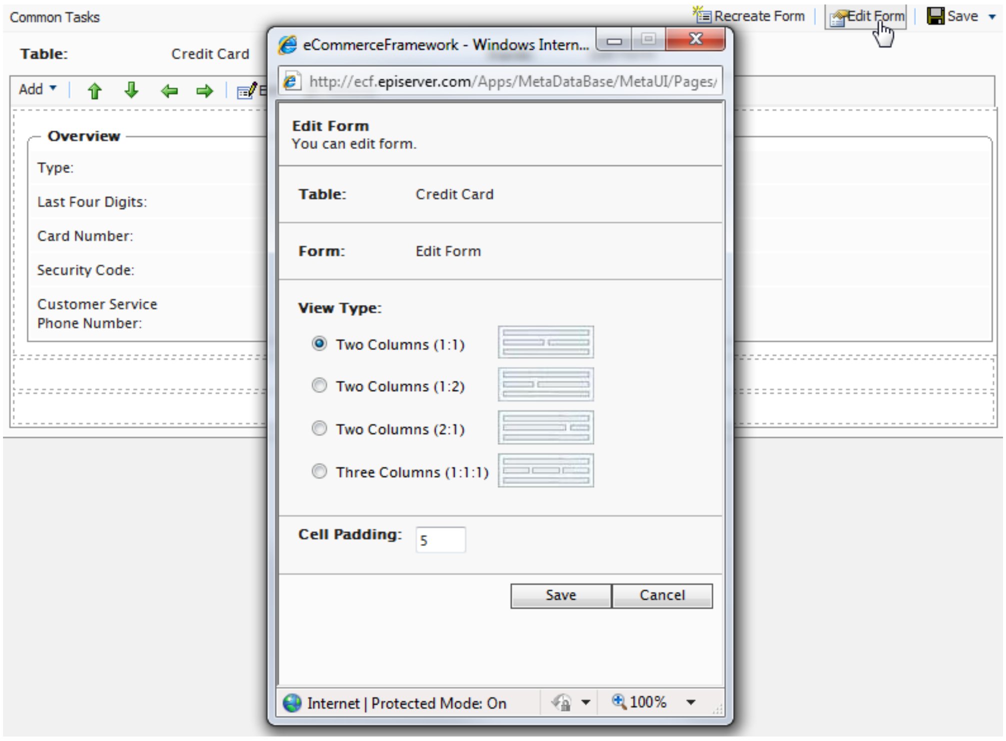
There are various functions available to edit and customize a form.

Editing the Layout

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.

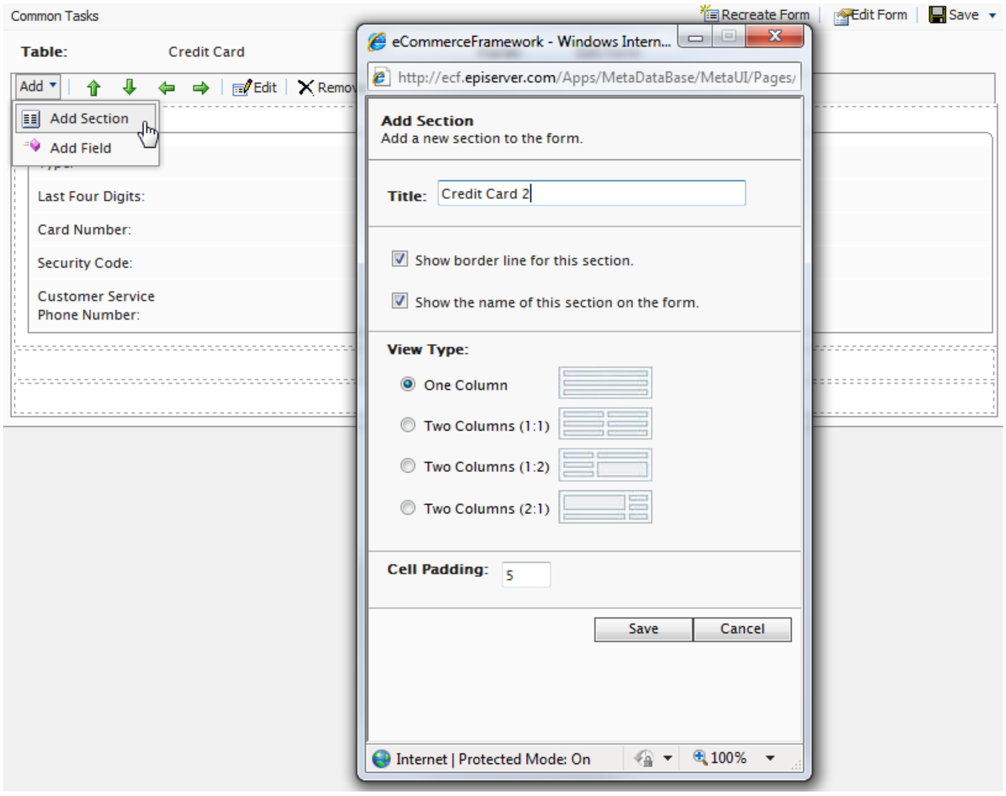
This example uses a Two Column (1:1) layout.



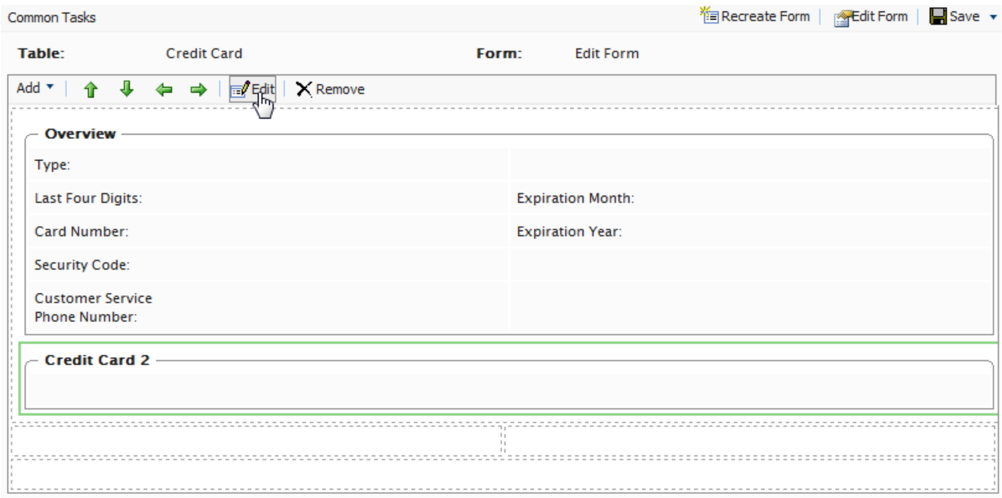
Adding Sections and Fields

Once your layout is set, you can add additional sections and/or additional fields.

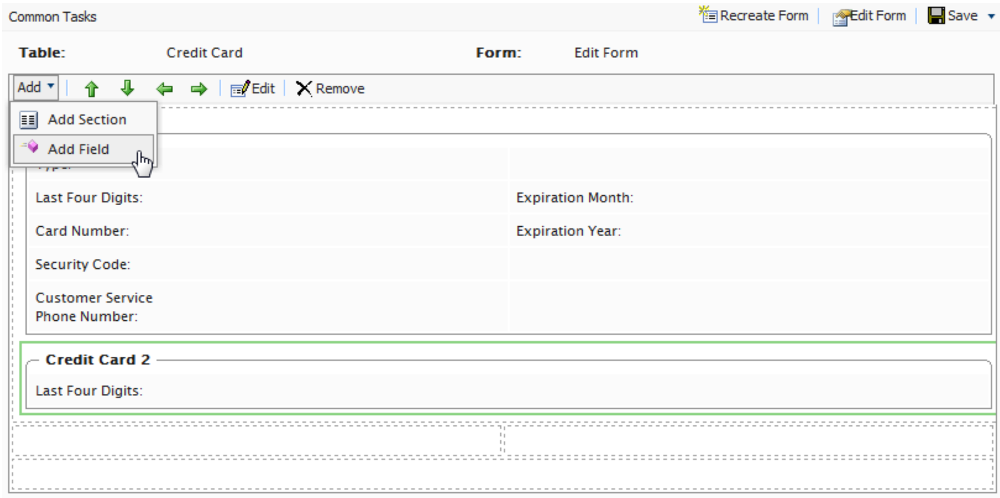
1. Click on **Add --> Add Section** to add a new section. Adding sections allows you to separate and divide groups of fields on a form with their own header and border.
2. Enter in a **Title** for the section.
3. Checkmark the box next to "Show border line for this section" if you want to show the border 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**.

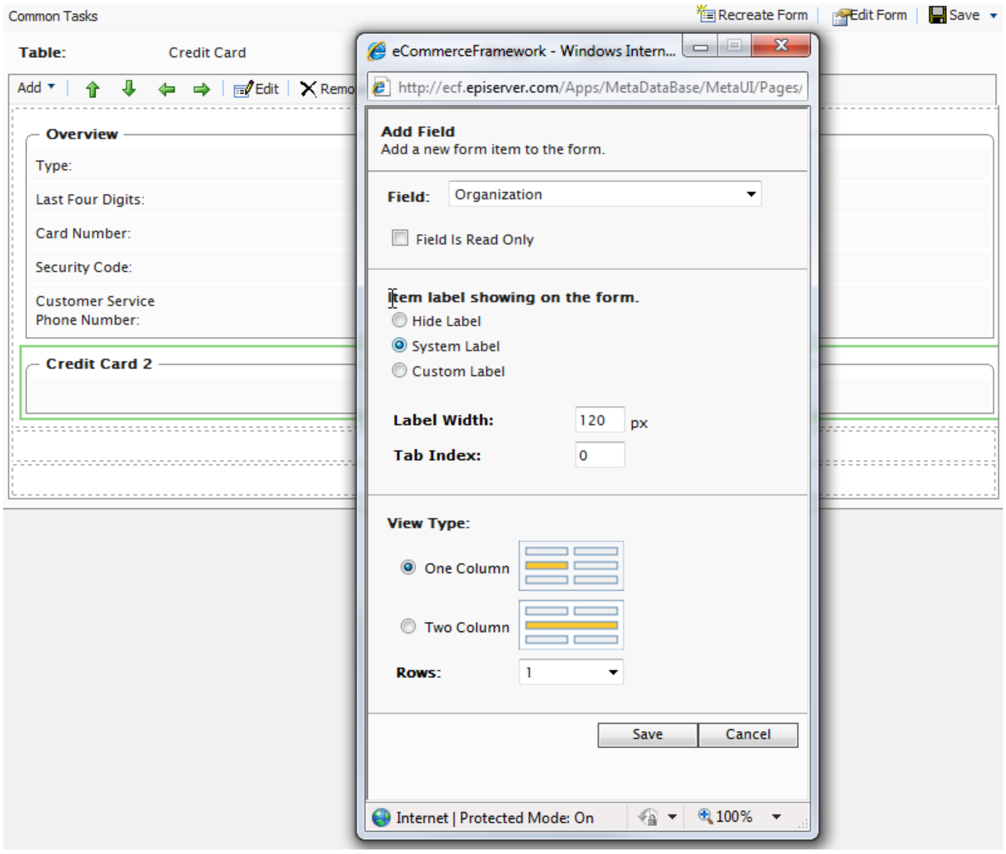


Within each section are fields. You can add new fields to a specific section by highlighting the section and then by clicking **Add --> Edit**.

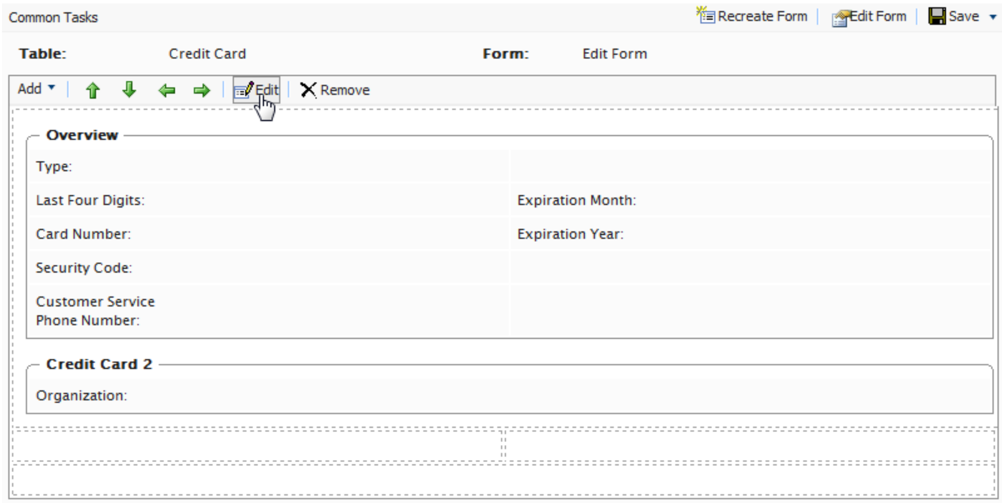


Select an existing associated field in the dropdown menu.
a. Checkmark the "Field is Read Only" box if you want the field to be unavailable for edit. When you see the rendered form, the field will be grayed out.

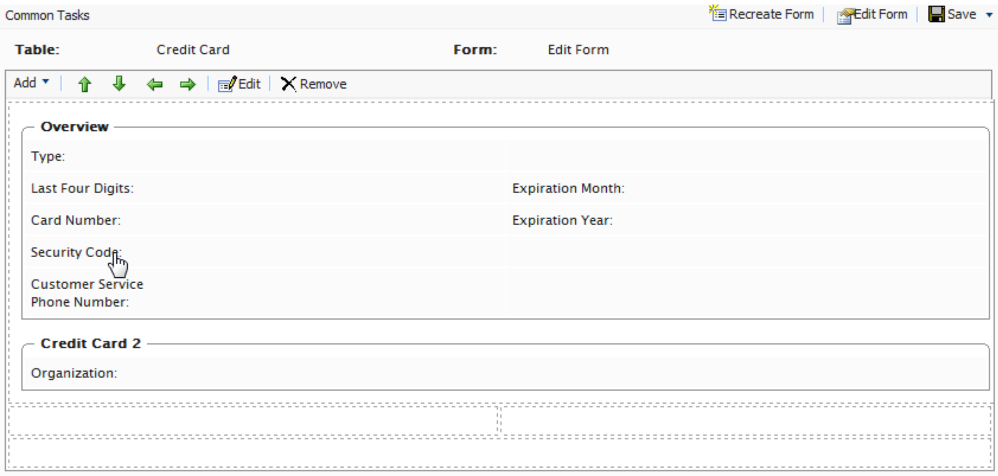
1. Select the "Item label showing on the form."
2.
   - **Hide Label:** No label appears next to the text box
   - **System Label:** Shows the system name next text box
   - **Custom Label:** Enter in a custom label
3. Enter in a **Label Width** numerical value. Default is 120px.
4. **Tab Index**: enter 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.



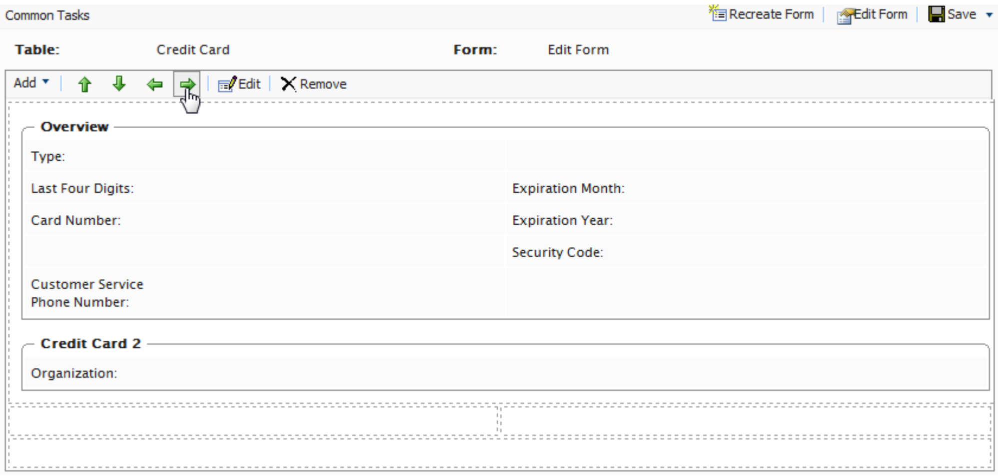
To edit a field, click and highlight the field and click on **Edit** to change your previous settings.



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.

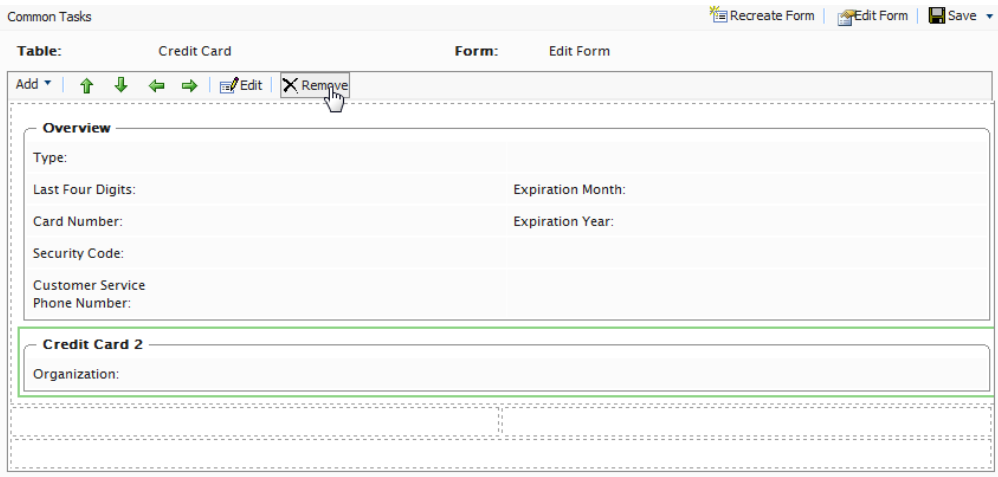


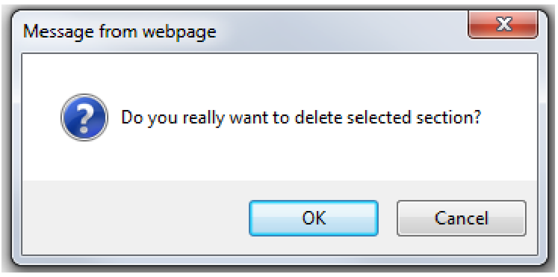
In this example, the "Security Code" field is moved to the right where the "Customer Service Phone Number" field is placed by clicking on the right directional arrow. Fields are moved from cell to cell within a section.



Deleting Sections and Fields

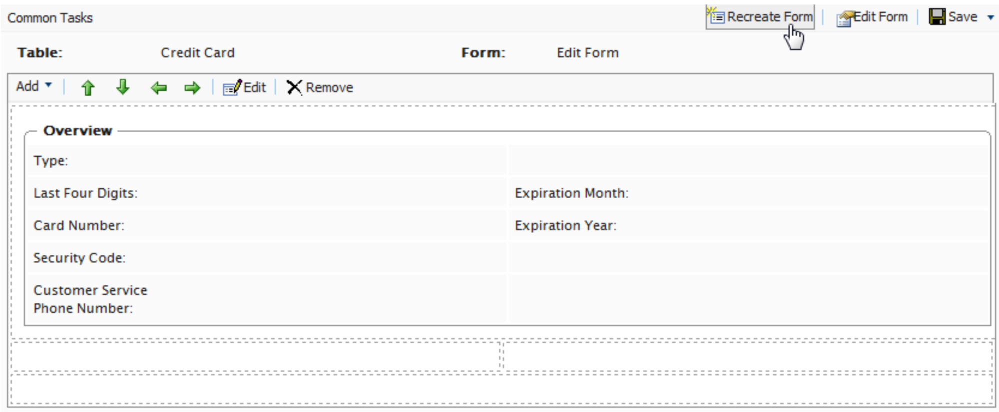
To delete a section or field, highlight either one and click on **Remove**. A popup will appear. Click **OK** to confirm deletion. Otherwise, click **Cancel**.



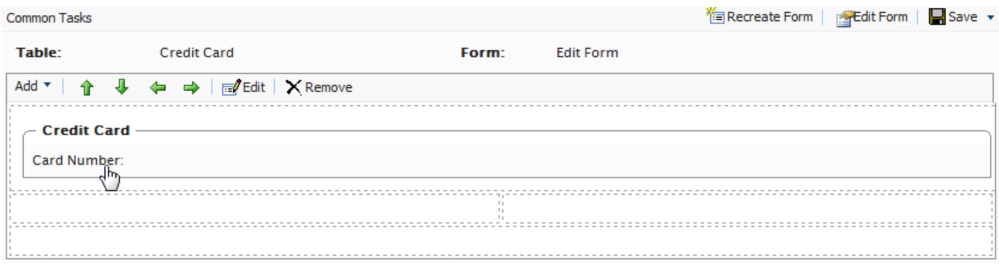


Recreating a Form

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.

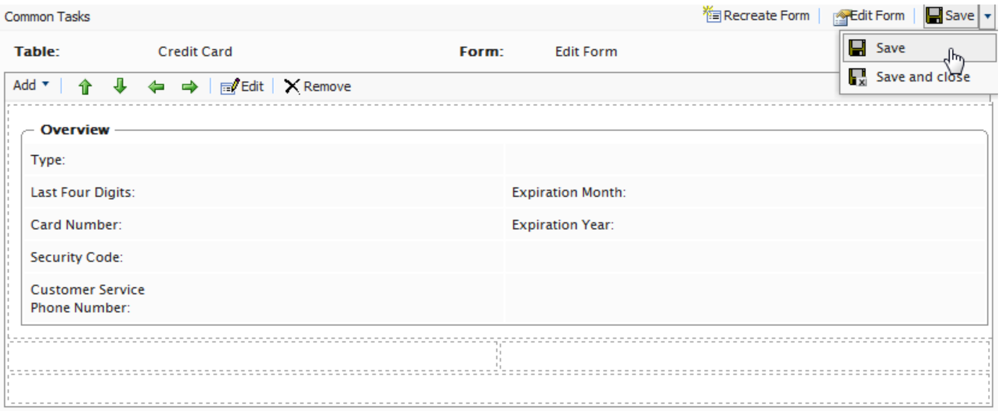


A popup will appear. Click on **OK** to recreate the form. Otherwise, click **Cancel**. Once you confirm, the fields will clear from the form except for the required field.

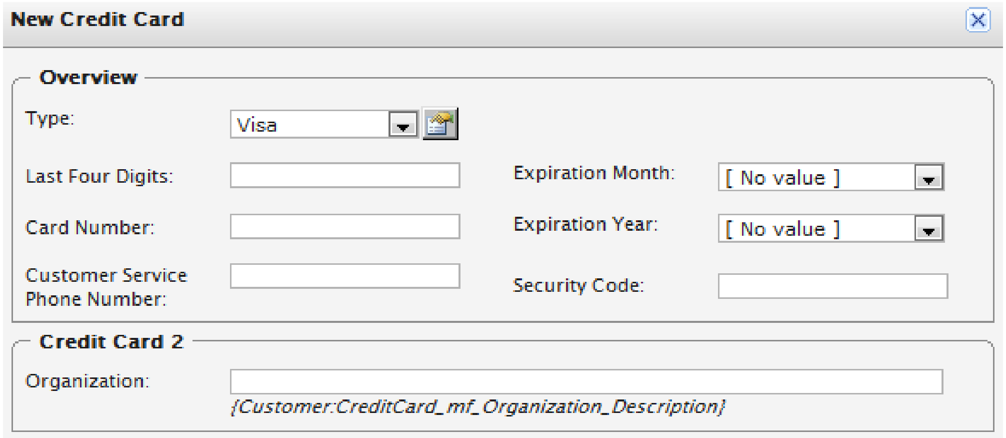


Saving a Customized Form

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 drop-down click **Save and close**.



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.



Relating Business Objects

Business objects must be related to other business objects to be able to connect, track and record relevant data. This is where the concept of **Relations** is used in Business Foundation.

Relations can be of these types:

- ***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.

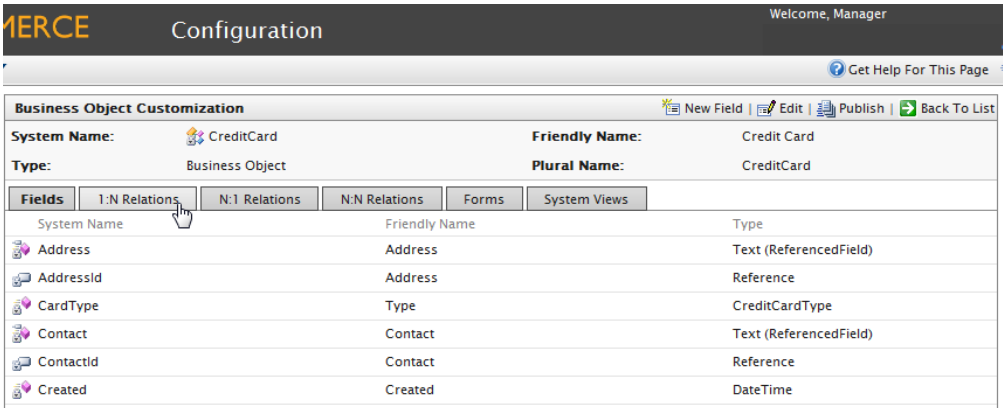
In the following we will describe how to create the various types of relationships between business objects.

Adding a 1 to Many Relation

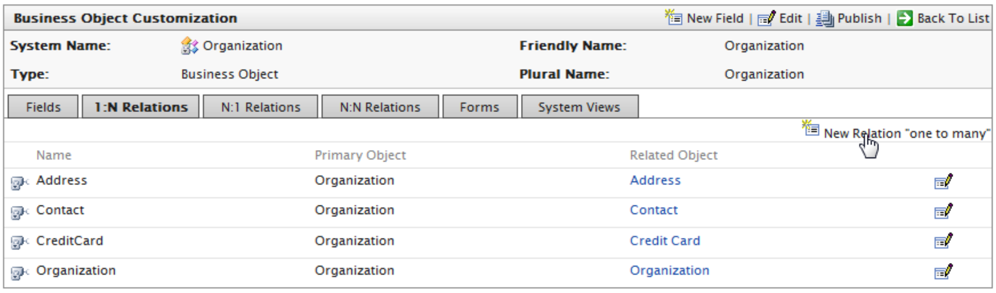
Business Foundation objects allows you to specify **1 to Many Relationships**. For example, if you have one organization, you can relate many types of data to that organization, such as multiple contacts, addresses, or organizational units or divisions within an organization. Within a 1:N relationship, 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.**

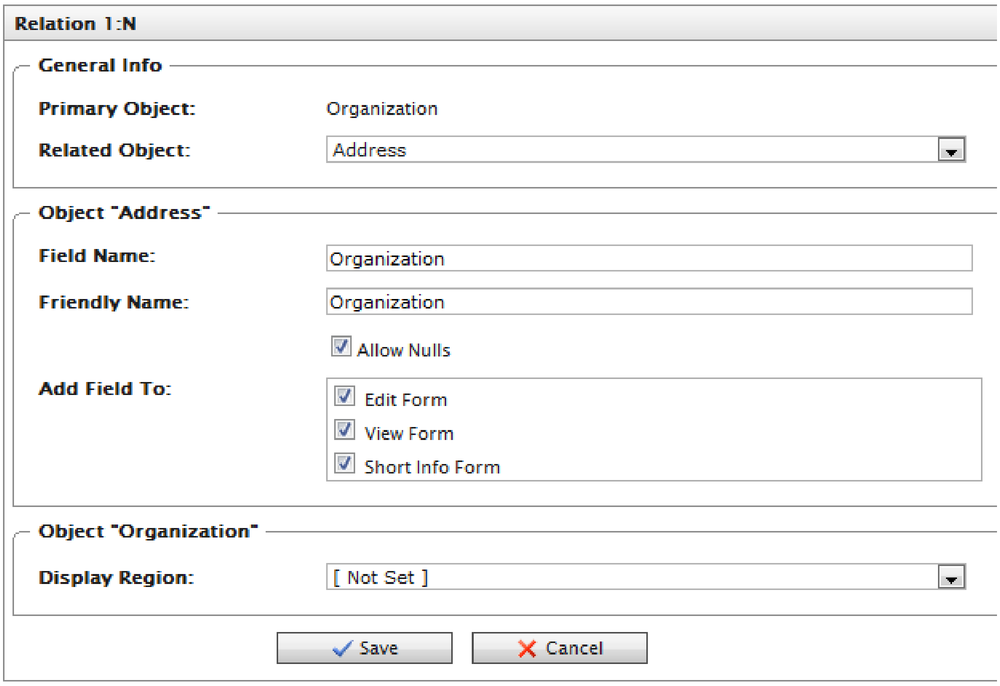


Click on **New Relation "one to many"** to create a new relation.

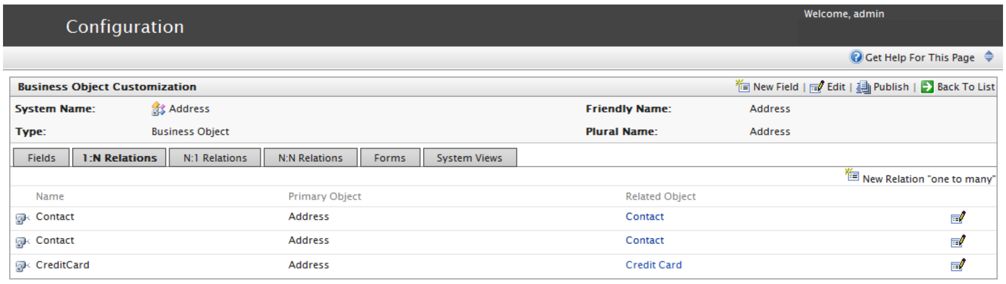


Under **General Info**, the Primary Object Organization is automatically set to Organization.

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 auto-populated 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 contact 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**.



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**.

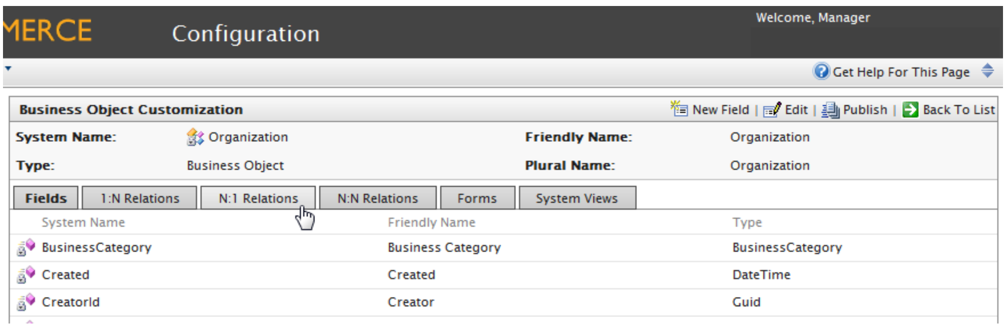


Adding a Many to 1 Relation

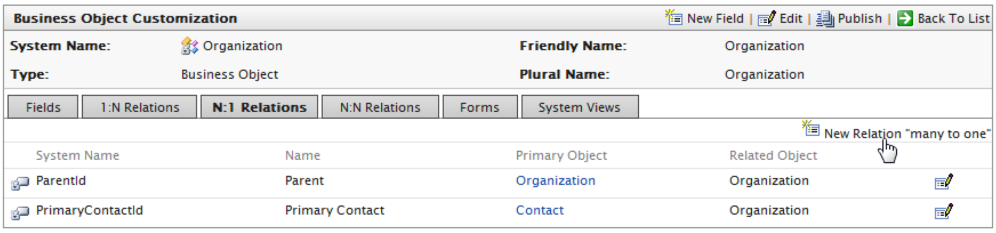
You can relate business objects via a **Many to 1 Relationship**. For example, you can relate multiple contacts to a single organization or unit.

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.



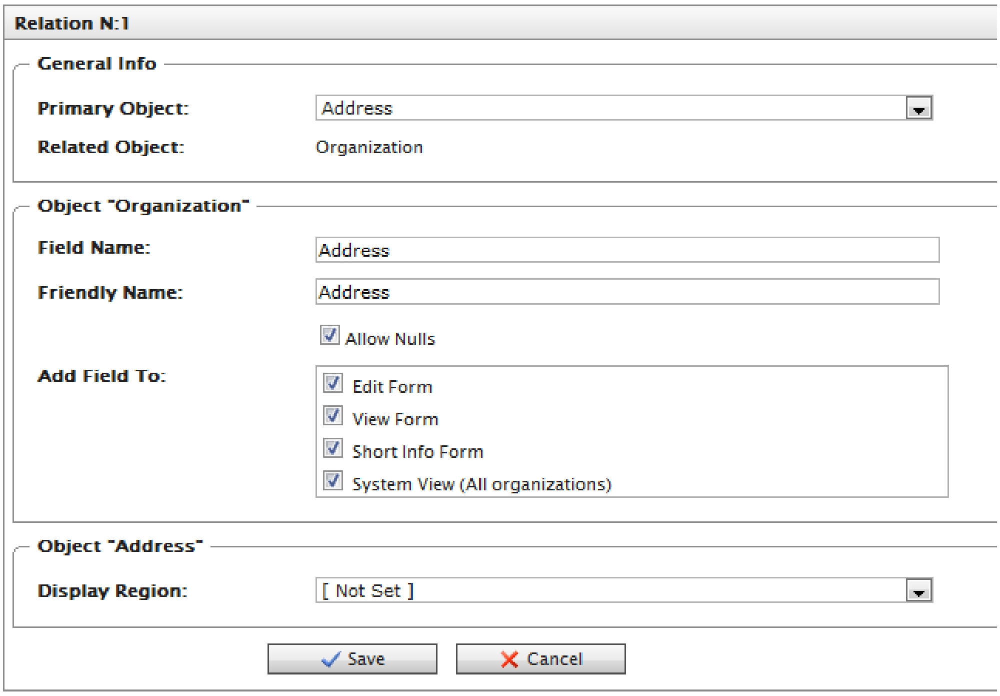
Click on **New Relation "Many to one"** to create a new relationship.



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 auto-populated 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 contact 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**.



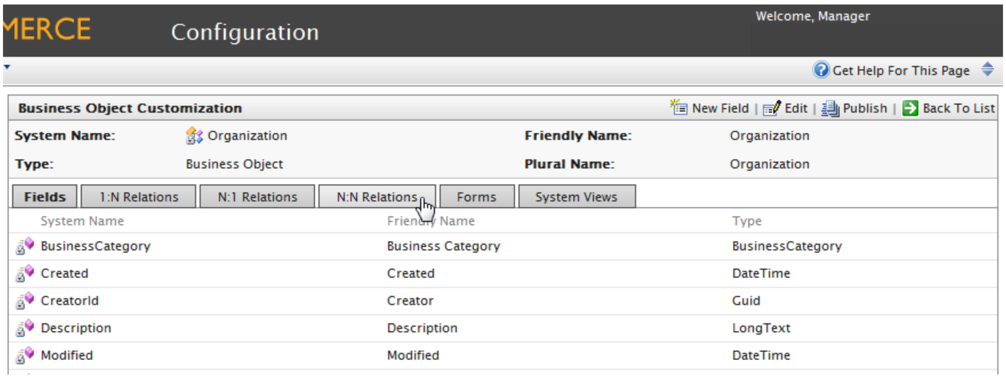
Like an 1:N relationship, if you create a N:1 relationship with a Primary and Related Object, a 1:N relationship is automatically generated for the Primary Object under the **1:N** tab.

Adding a Many to Many Relation

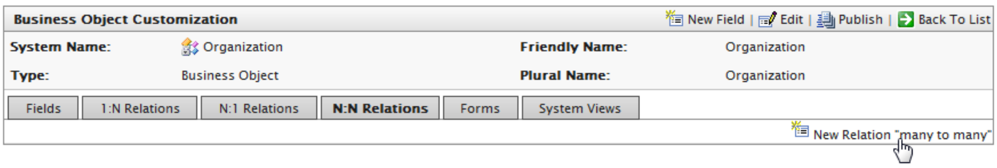
You can also create **Many to Many Relationships** with business objects. For example, many to many relationships help to track different SKUs and their inventory levels with different warehouse locations. Another example is multiple contacts a part of multiple organizations. A Many to Many relationship 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.



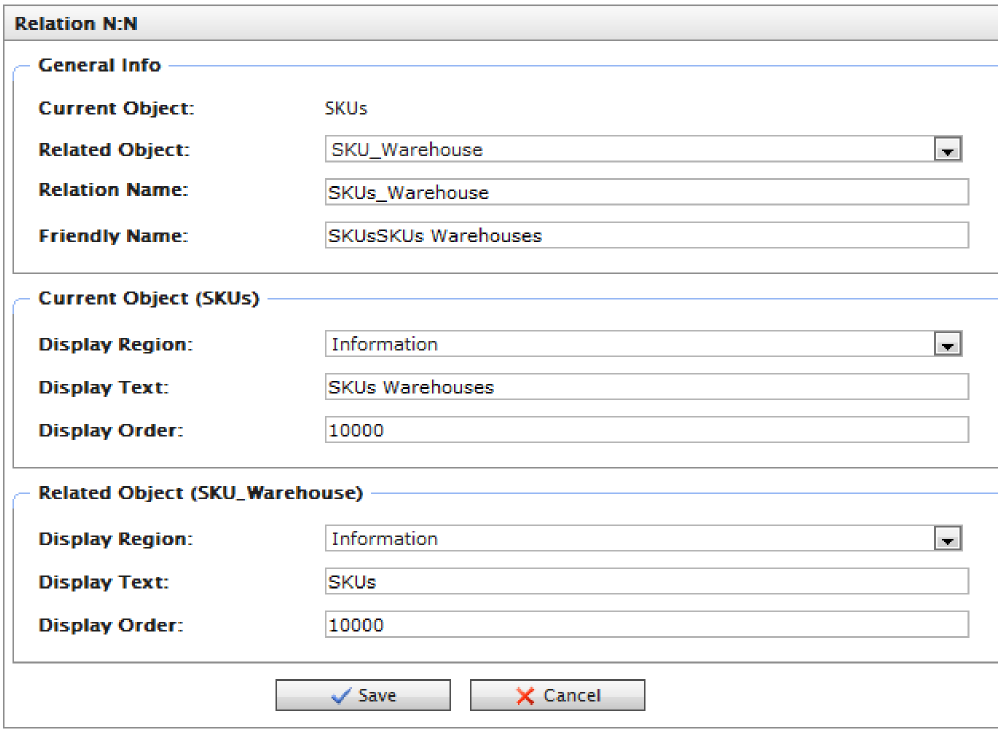
Click on **New Relation "many to many"** to create a new N:N relationship.



The Relation N:N is much different compared to the Relation 1:N/N:1 forms.

1. The **Current Object** defaults to the name of the Business Object you are editing
2. Select a **Related Object** from the dropdown menu
3. The **Relation Name** is auto-populated 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.
4. 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.
5. Under Current Object, select a **Display Region** where the field will appear.
6. Under Related Object, select a **Display Region** where the field will appear.

Once all the relevant information is entered, click on **Save**.



A many to many relationship is automatically generated for the related object when you click on its N:N tab under its configuration form.

Publishing Business Objects

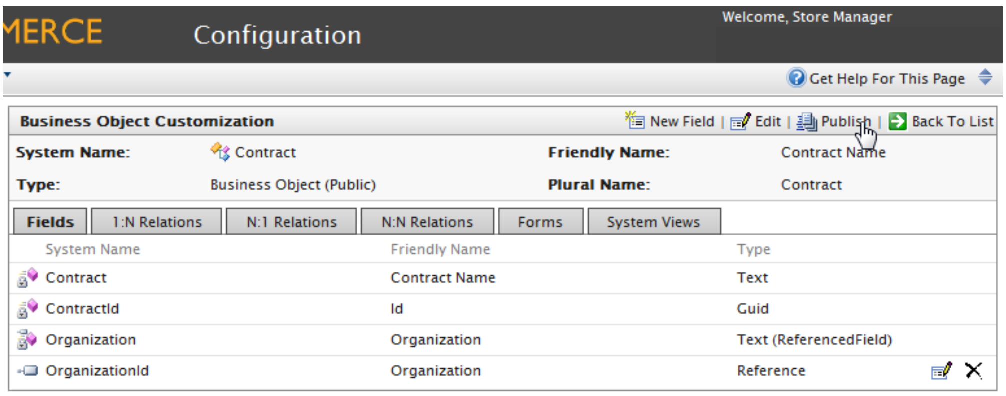
Introduction

Another feature of Business Foundation is the ability to publish objects within the left navigation as a node. You can essentially add more functionality to a specific system without modifying code. Before publishing you can set proper access permissions for the business object, controlling which user groups will have access to use the business object

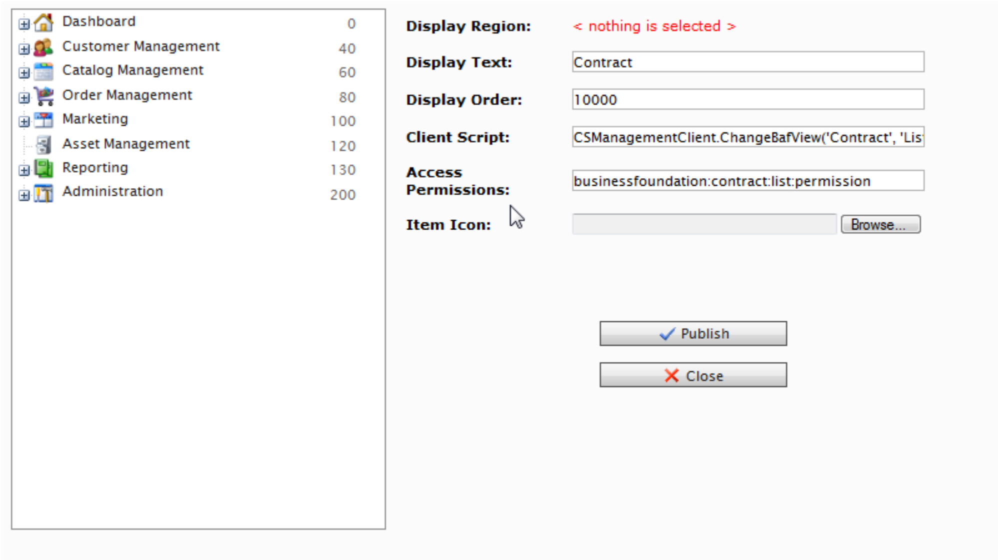
For related information refer also to the section *Customizing the Left Menu*.

Setting Permissions and Publishing

Click on **Publish** on the **Business Object Customization** page.



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.



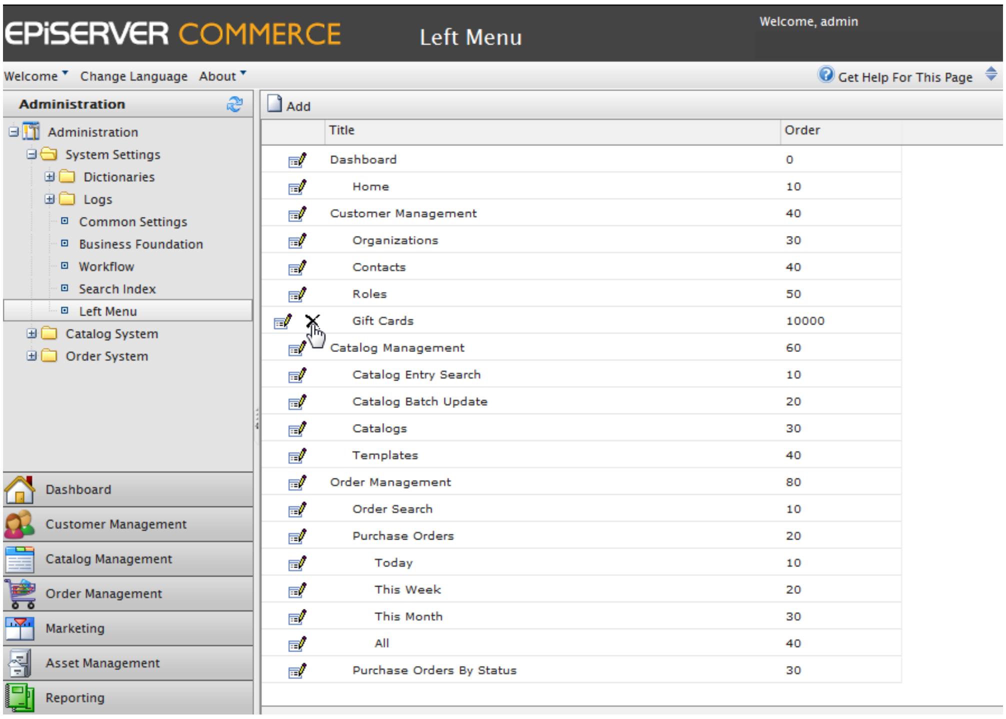
Click **Publish** to publish the selected business object.

You must refresh your browser after a business object has been published in order to make it appear in the left hand navigation.

Deleting 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.



Updating the Search Index

Introduction

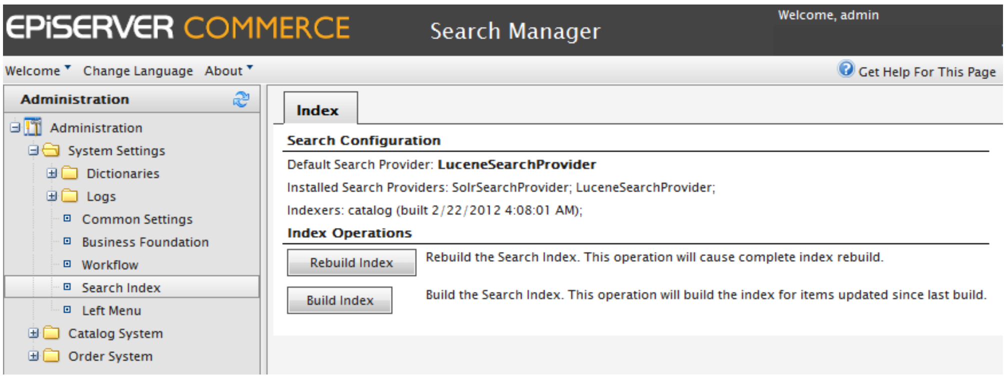
When you have done changes to an existing product catalog, such as adding or deleting products, you will need to index the catalog for those changes to be reflected in the search results.

There are two types of indexing: **Build** and **Rebuild**. Use the **Build** option to make a **quick re-indexing** of an existing catalog where you made changes to existing products. Build is faster 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.

Building and Rebuilding the Catalog

To build or rebuild your catalog, go to **Administration** > **System Settings** > **Search Index**.



Select **Rebuild Index** or **Build index**. Once you perform either of these two operations, you will see the changes or additions reflected in your search results.

If you have the Quartz service installed, then your catalog is reindexed every five minutes or whatever time interval you decide upon. Refer to the EPiServer Commerce Developer Guide for more information about the Quartz service.

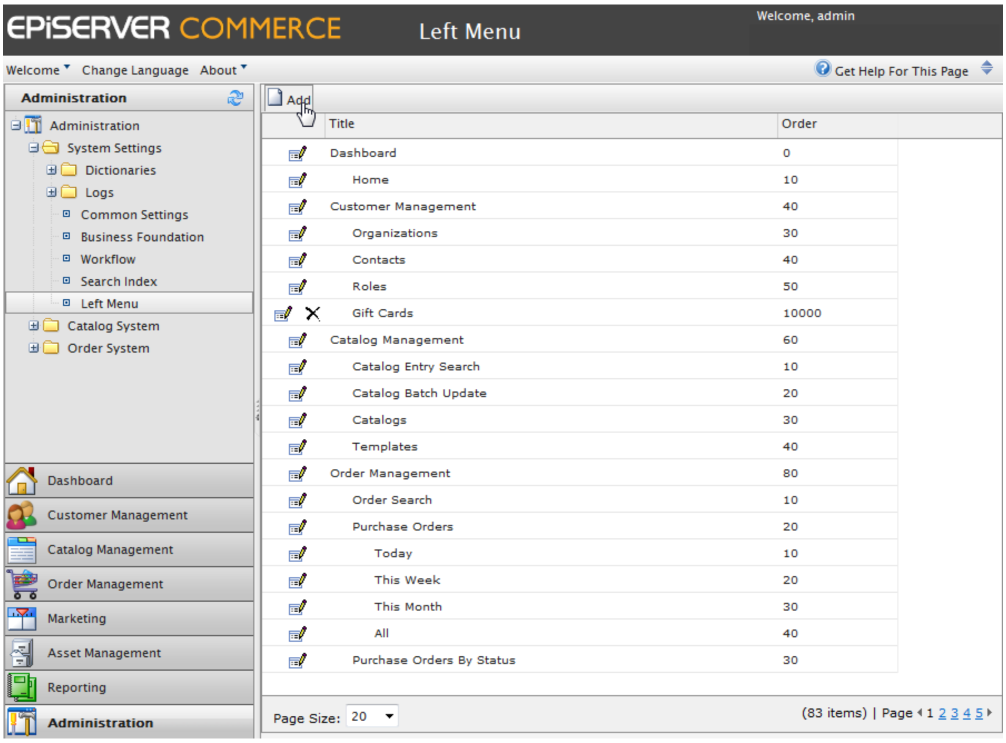
Customizing the Left Menu

Introduction

Prior to customizing your left menu, we advise you to read the section *Publishing Business Objects* describing how to configure Business Objects and adding them as individual nodes in the left navigation frame.

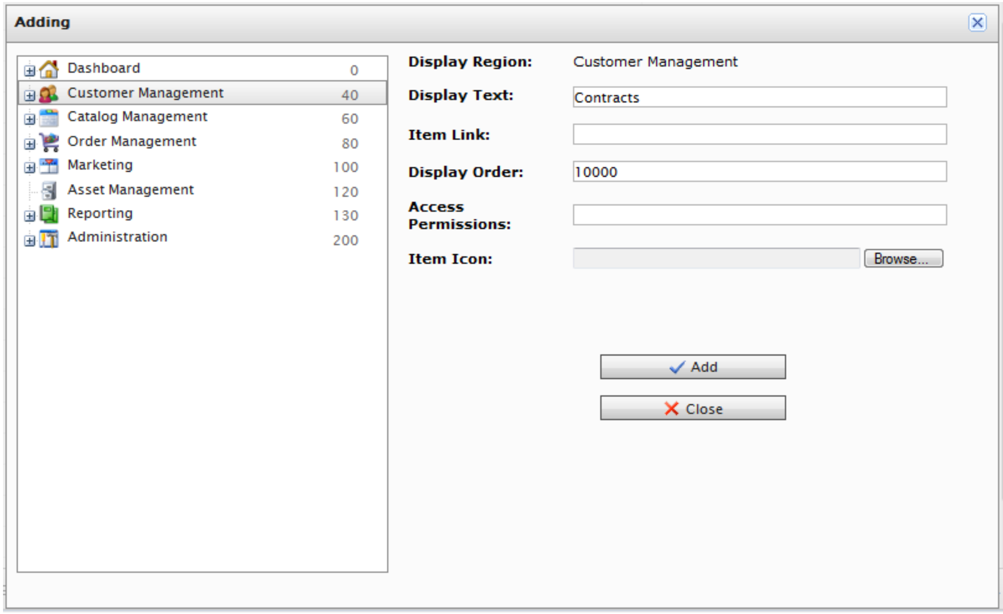
Adding a Left Menu Item from the Left Menu Page

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).

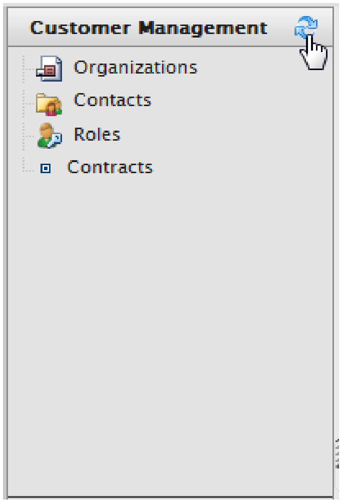


A new window will pop up for publication settings.

1. Select a **Display Region** from the navigation three 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 auto-populated 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**.

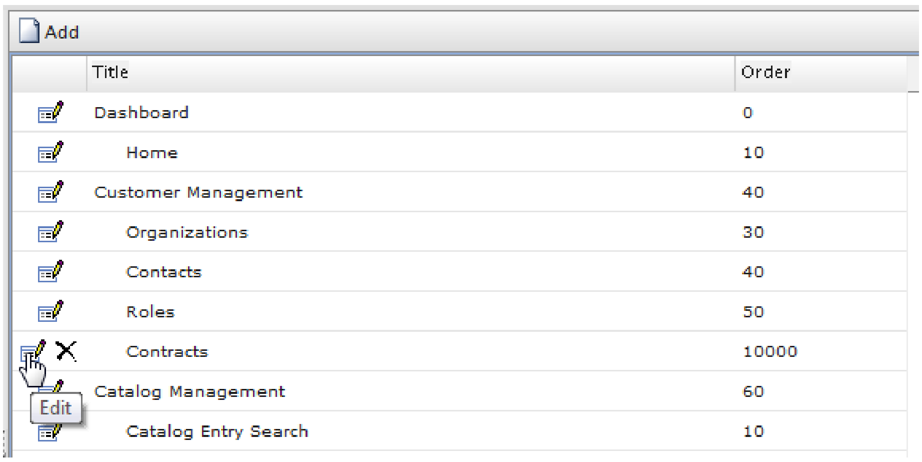


To verify if the object was published, go to the **Display Region** where you specified the object to be published to. Click on the **Refresh** icon on the left navigation frame if at first you do not see the new node.

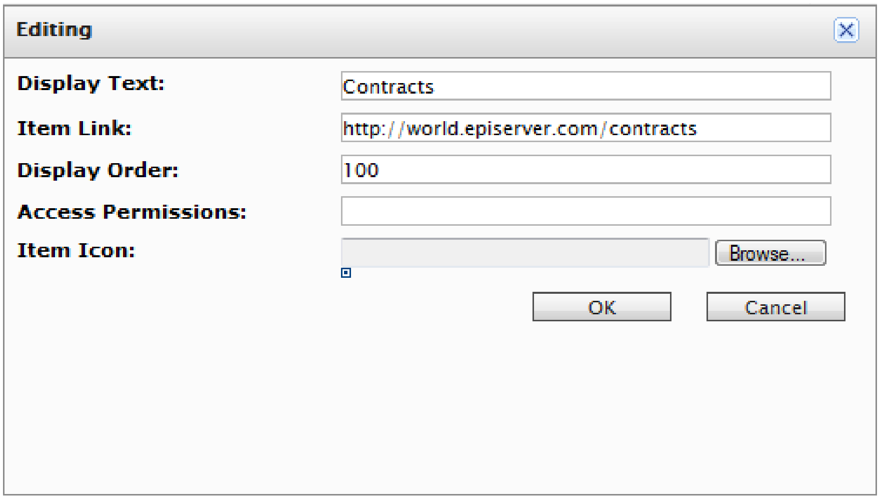


Editing, Ordering, or Deleting a Left Menu Item

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

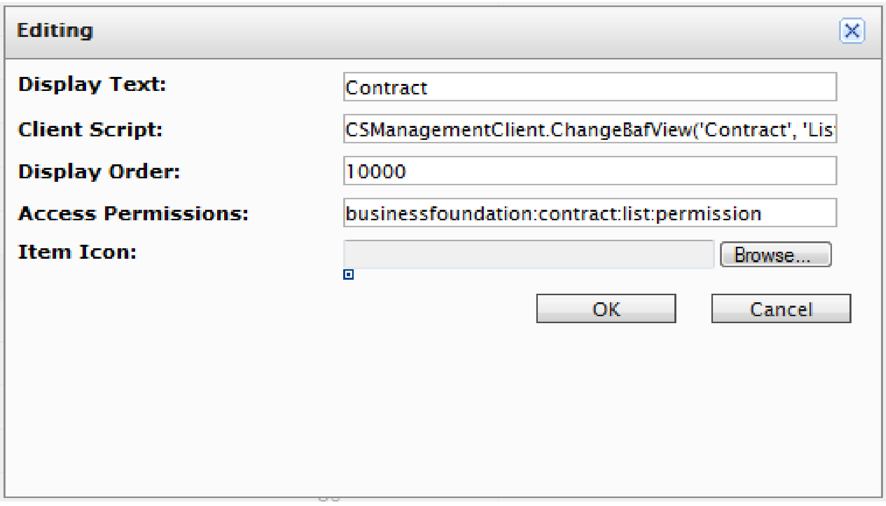


If the left menu item was created via the **Left Menu** page, this popup window will appear.



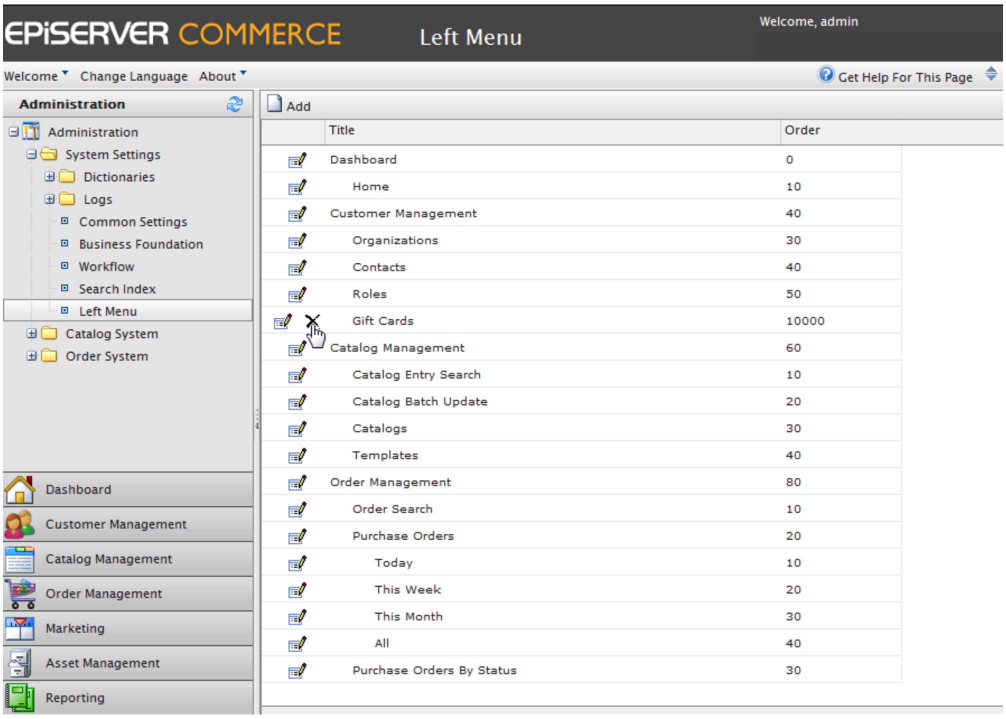
If the left menu item node was created using **Business Foundation**, this popup appears.

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.



To save changes, click **OK**.

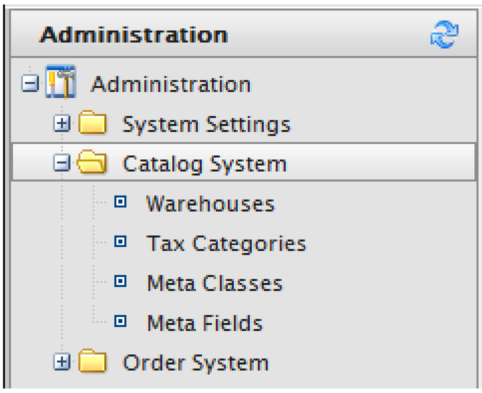
To delete a left menu item, click on **X** icon.



Catalog System Administration

Under **Catalog System** you can set up *warehouses* and *tax categories*, as well as work with *catalog specific meta fields and meta classes*.

The features can be accessed by selecting **Catalog System** under **Administration**



In this section we will describe how to work with the options under **Catalog System**.

Warehouses

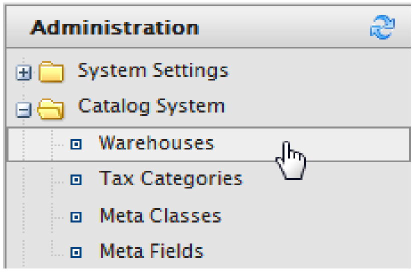
Introduction

A **Warehouse** is the physical place with an address from which product items are shipped. EPiServer Commerce includes the option to add and track a list of warehouses within the system. When *creating a new SKU*, you will specify the warehouse where the item is being stored under the **Pricing/Inventory** tab.

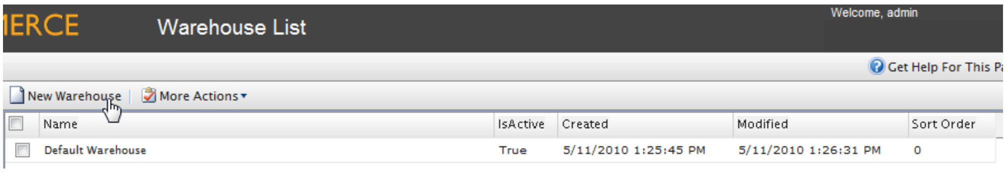
A SKU can only have **one warehouse** associated to it.

Adding a Warehouse

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

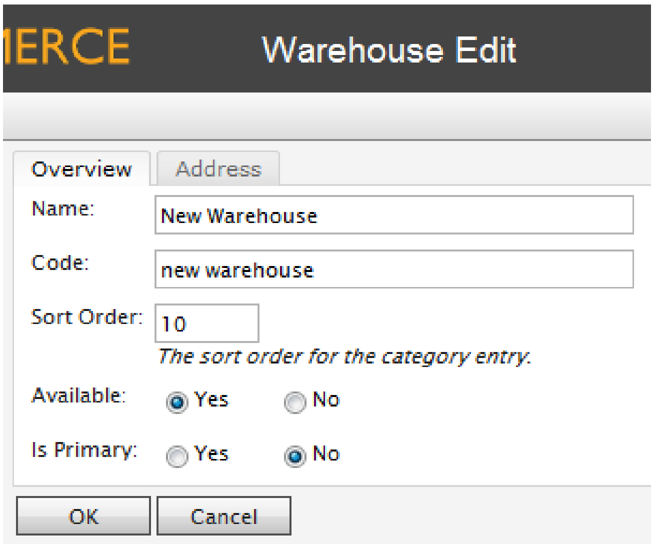


The **Warehouse List** page appears. The sample site has a default example warehouse called "Default Warehouse". To create a new warehouse, click on **New Warehouse** on the menu bar.

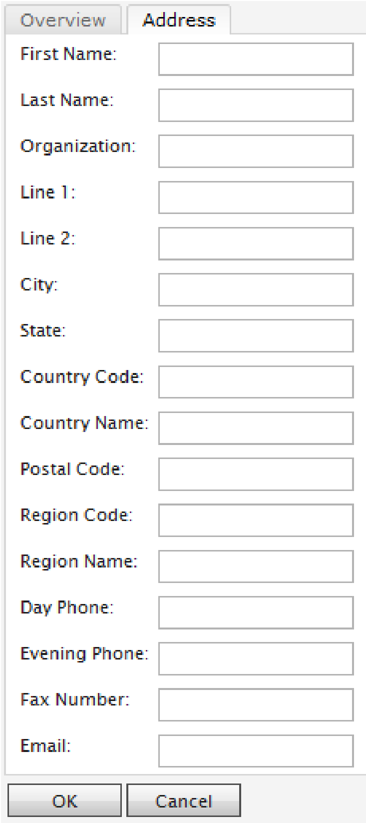


The **Warehouse Edit** page has two tabs: **Overview** and **Address**.

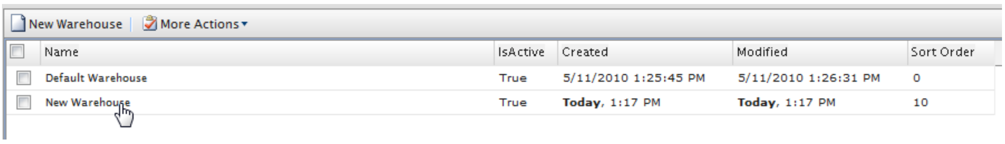
1. Under the **Overview** tab enter in a **Name** and **Code**. The Name and Code name can have spaces in between characters.
2. Enter in a value for the **Sort Order** to determine the Warehouse's position on the **Warehouse List**.
3. Under **Available** select "Yes" or "No."
4. Under **Is Primary**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



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

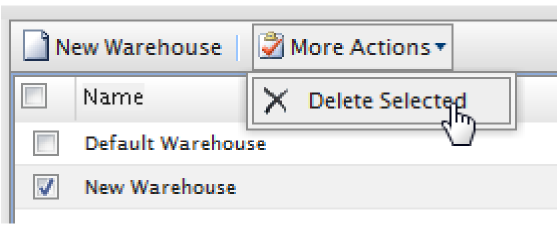


6. Once you are satisfied with your entries, click on **OK** to save the Warehouse. Otherwise, click **Cancel** to go back to **the Warehouse List** page. The new Warehouse will appear on the list.



Deleting a Warehouse

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



Confirm deletion by clicking **OK** on the pop-up window.

Tax Categories

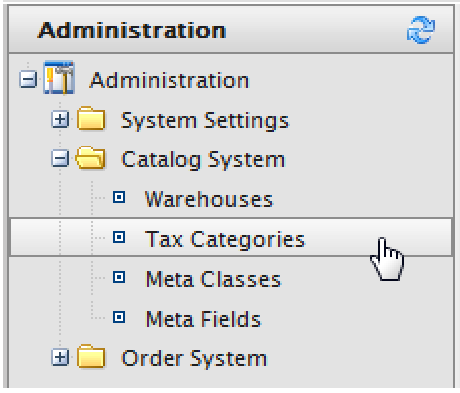
Introduction

Tax categories for catalogs will work in coordination with your *tax configuration setup* for orders. The tax configurations includes specific taxes for example state, local and federal taxes. Refer to the *Tax*

Configuration section for more detailed information.

Adding a Tax Category

Go to **Administration**, **Catalog System** and click **Tax Categories** to see a list of existing tax categories.



To create a new category, click on **New**. A pop-up window appears. In the **Tax Category Name** field, enter a name and click **OK** to save the tax category.

Deleting a Tax Category

To delete a tax category, click the **Delete** icon next to the item in the **Tax Categories List**. To delete multiple items, select the check boxes next to items, select **More Actions** and then **Delete Selected**.

Catalog Meta Classes and Fields

Introduction

Using meta classes and meta classes, it is possible to extend the meta data of catalog items and order forms. Meta fields are for adding specific data about an item. For instance, if you create a meta class called "Wine" you will want to add meta fields that are characteristic for wine, for instance "color", "taste", "vintage" and "maturity".

When meta fields and classes have been created in the System Administration part of Commerce Manager, they will be available for usage when working with *product entries in the product catalog*.

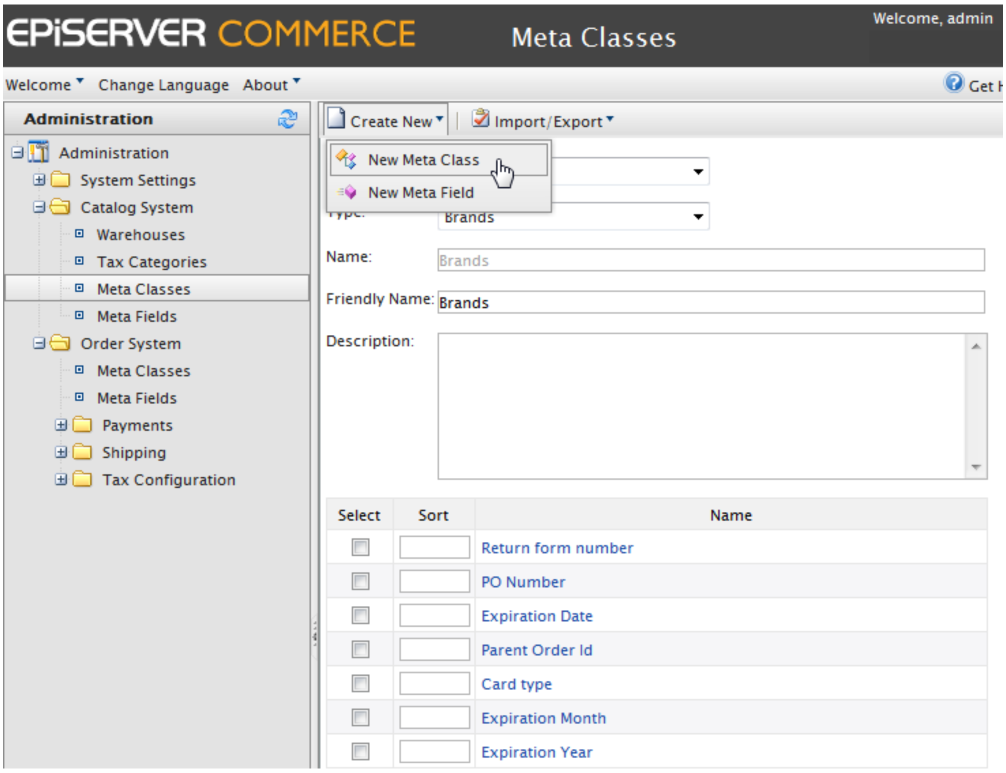
Refer also to the section *Using Meta Classes and Meta Fields* for catalog attributes.

Creating a Meta Class

Do the following to create a meta class:

1. Navigate to **Administration**, **Catalog System** and select **Meta Classes**. This will open the **Meta Classes** page.

2. Click **Create New** and select **New Meta Class**.



3. Enter the meta class details.
   Name - name of the meta class used in your code, this cannot have any spaces.
   Friendly Name - name of the meta class displayed for practical use in Catalog Management.
   Description - description of the meta class.
   Object Type - select **Catalog Node** or **Catalog Entry**.
4. Click **OK** to save your changes.
5. You will now see that your newly created meta class is available in the drop-down for Type.

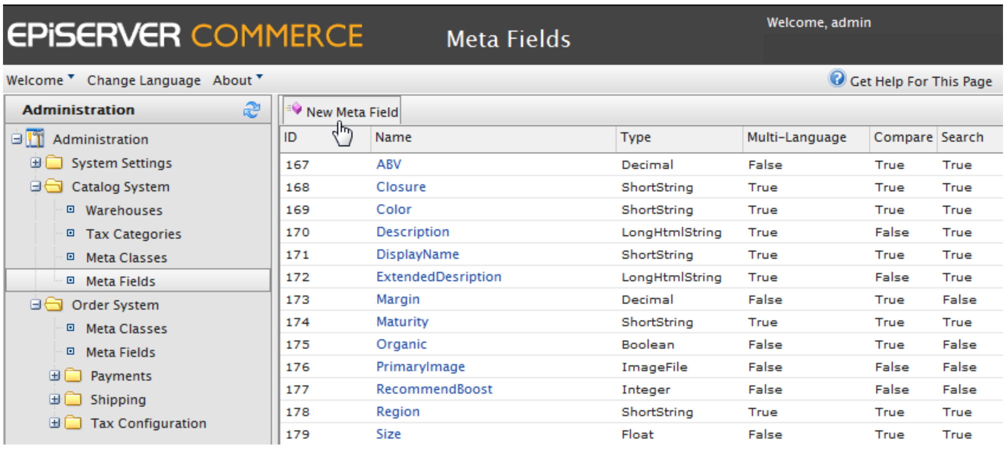
If you select the meta class you will see all of the available meta fields listed below, but with none selected. Next steps will be to create and apply desired meta fields.

Creating a Meta Field

Do the following to create meta fields and customize the attributes of a catalog meta class:

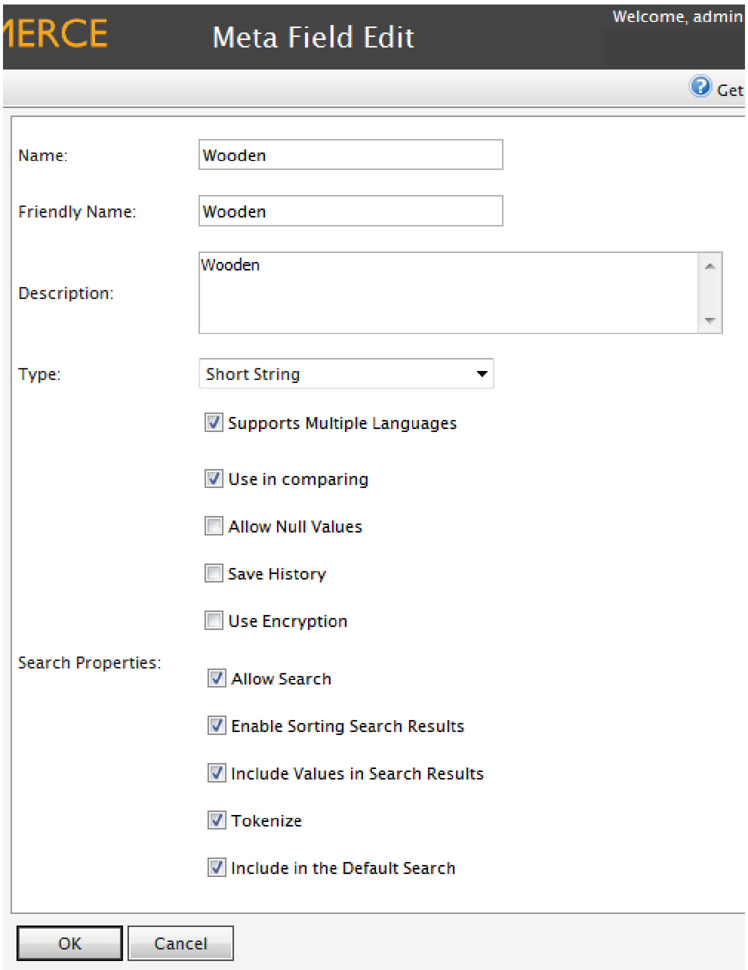
1. Navigate to **Administration**, **Catalog System** and select **Meta Fields**. This will open the **Meta Fields** page.

2. Click **Create New** and select **New Meta Field**. Click on **New Meta Field** and the meta field edit page will appear.



Alternatively, select **New Meta Field** from the **Create New** drop-down within the **Meta Classes** page.

3. Enter **Meta Fields** details.



Field	Description
Name	Enter a system name without spaces or special characters (e.g. "NumberMegapixels," without the quotes).
Friendly Name	Enter a user-friendly name seen by end-users on the back and front-end (e.g. "Number of Megapixels," without the quotes).

Description	Enter any additional information about the meta field.
Type	The drop-down menu shows the field types you can use for the meta field. The types available are: - datetime - decimal - float - money - Integer - Boolean - Date - Email - URL - Short String - Long String - Long Html String - String Dictionary - File - Image File - Dictionary
Search Properties	Depending on the data field type selected, you may have the option to set the search properties of the data field. The options are: - **Allow search** - allows for searching directly on this metafield. - **Enable Sorting Search Results** - search results will be sorted on this metafield. - **Include Values in Search Results** - when the search results is returned, the original value of this metafield will be included with the search results. - **Tokenize** - search is prepared for individual words in, for example a long product description property (word breaking). - **Include in the Default Search** - feature which tokenizes and combines metafield values for search from the front end site.

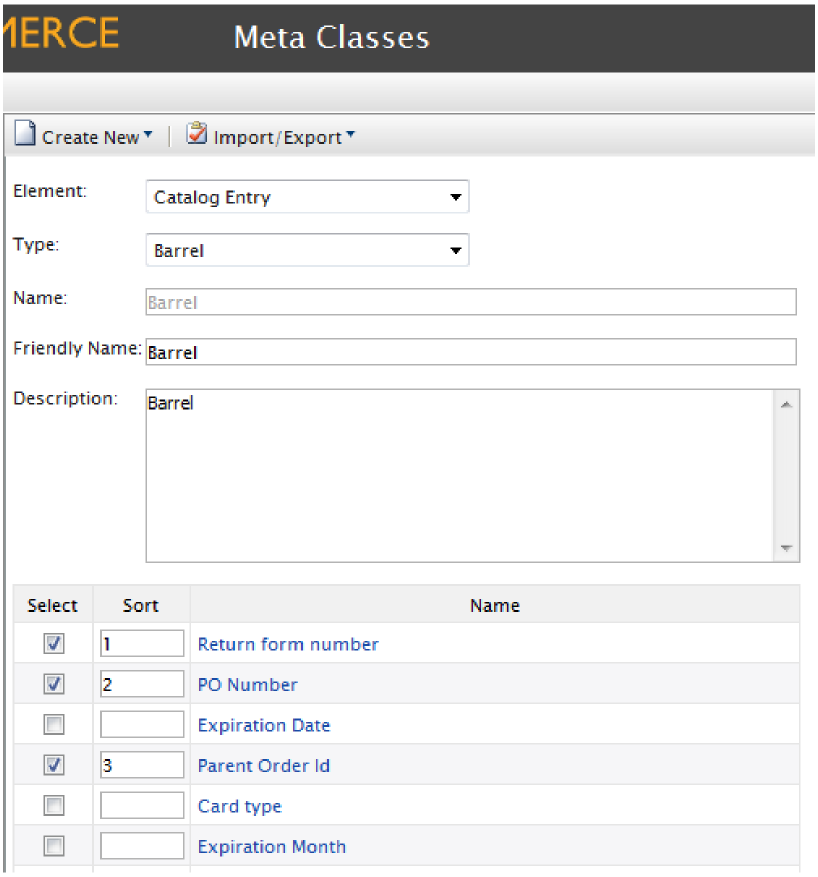
4. Click **OK** to save your changes. The newly added meta fields will be listed in the meta fields list.

If newly created meta fields are not immediately visible, go to the next page or set the **Page Size** to display more entries.

Applying Meta Fields to a Meta Class

Do the following to apply meta fields to a particular meta class:

1. Navigate to **Administration**, **Catalog System** and select **Meta Classes**.
2. Select **Catalog Entry** from the **Element** drop-down menu, then select the desired meta class from the **Type** drop-down.
3. To apply a meta field to a meta class, check mark the box next to the meta field. If you wish to sort the order that the meta fields appear in the catalog entry, enter a number into the **Sort** field.

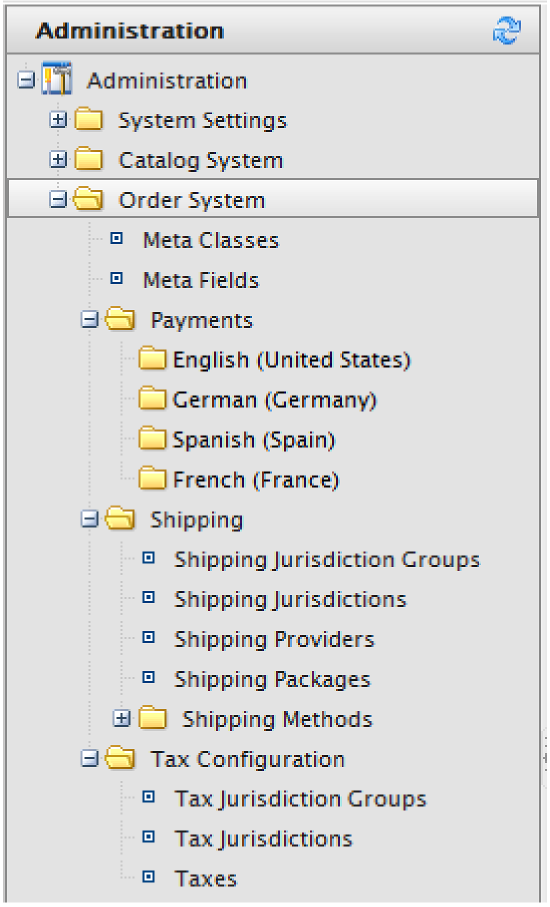


4. Click **OK** to save your changes.

Order System Administration

Under **Order System** you can set up *payment methods*, *shipping methods* and *providers, configure specific taxes*, as well as work with *order specific meta fields and meta classes*.

The features can be accessed by selecting **Order System** under **Administration.**



In this section we will describe how to work with the options under **Order System**.

Payments

Introduction

Payments is an essential part of an e-commerce system. When shopping online customers will be presented with a number of different payment options. When creating and configuring payments 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 – these are **meta classes** which contain the properties of a particular payment type. For example, a credit card payment type contains credit card number, card expiration date and card type. The most common payment types are already built-in to EPiServer Commerce:

- Credit card
- Cash Card
- Gift Card
- Invoice

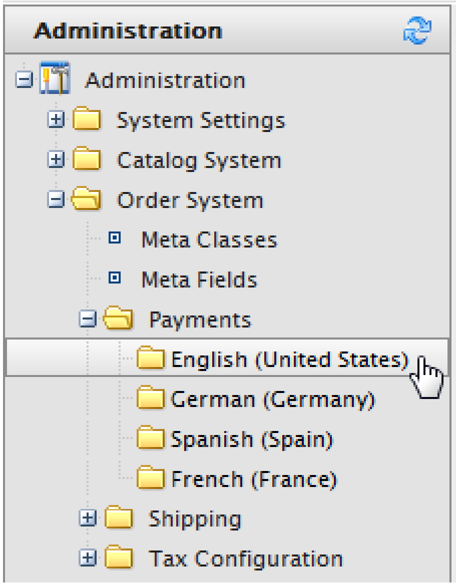
In addition, a generic "OtherPayment" class type is included in EPiServer Commerce.

Payment Gateways – these 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.

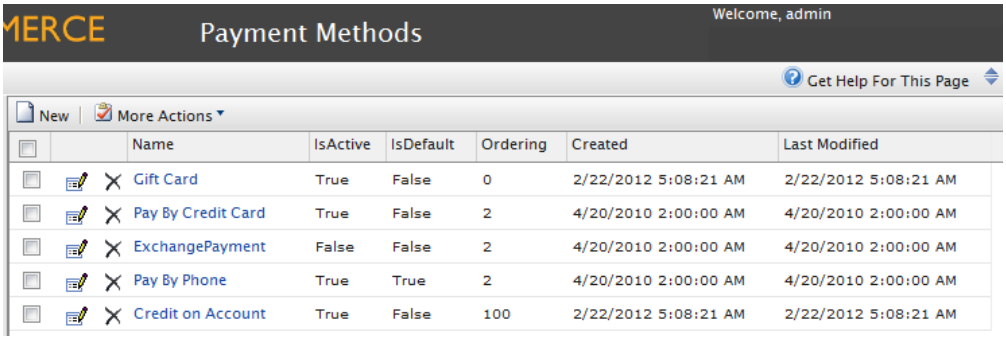
Payment Methods – these contain information about the way the customer **views a payment option** and has a payment gateway associated with it.

Using Built-In Payment Gateways

To setup payments using a built-in payment gateway, go to **Administration, Order System** and **Payments**. Select a language in the list.



The **Payment Methods** window appears.

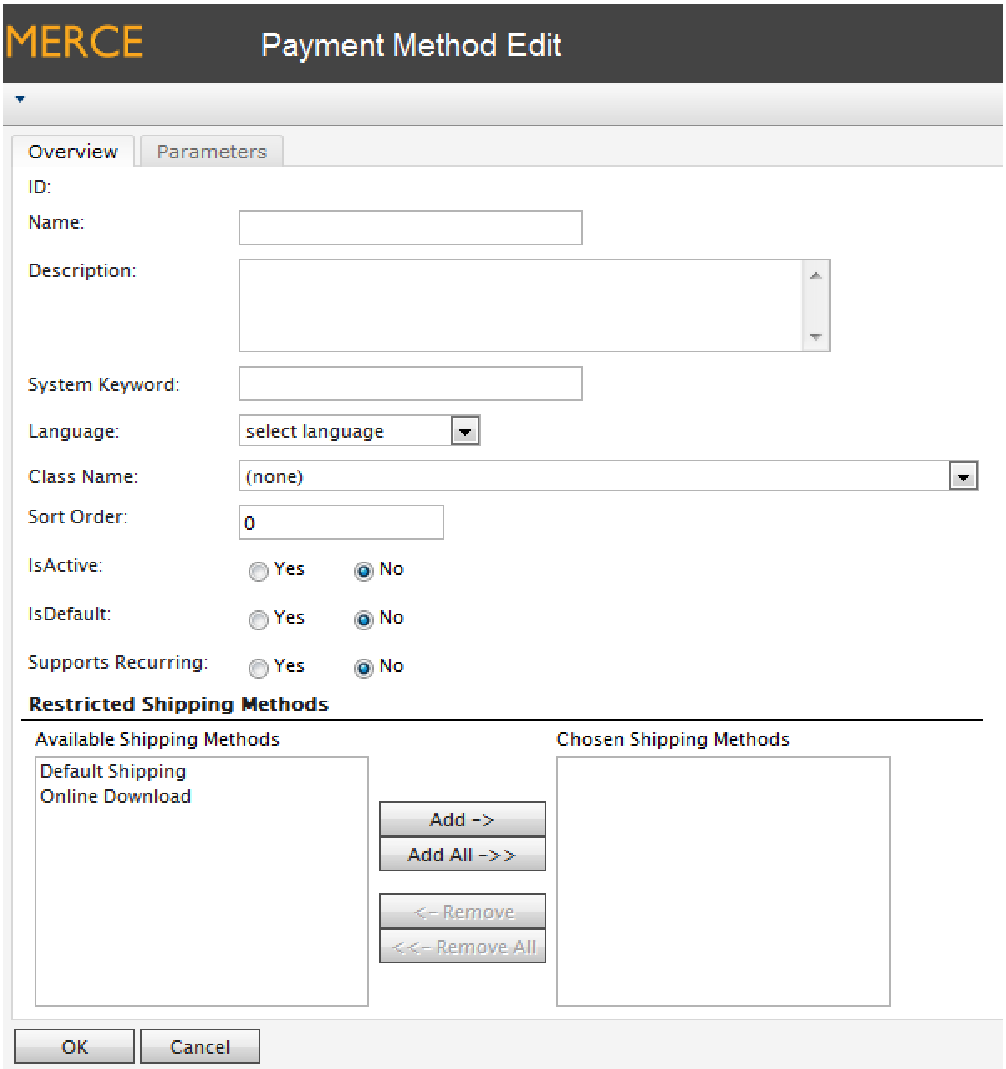


Name	IsActive	IsDefault	Ordering	Created	Last Modified
Gift Card	True	False	0	2/22/2012 5:08:21 AM	2/22/2012 5:08:21 AM
Pay By Credit Card	True	False	2	4/20/2010 2:00:00 AM	4/20/2010 2:00:00 AM
ExchangePayment	False	False	2	4/20/2010 2:00:00 AM	4/20/2010 2:00:00 AM
Pay By Phone	True	True	2	4/20/2010 2:00:00 AM	4/20/2010 2:00:00 AM
Credit on Account	True	False	100	2/22/2012 5:08:21 AM	2/22/2012 5:08:21 AM

If selecting English (US) on the EPiServer Commerce sample site the following payment methods will be available by default:

- Gift Card
- Pay By Credit Card
- Exchange Payment
- Pay By Phone
- Credit on Account

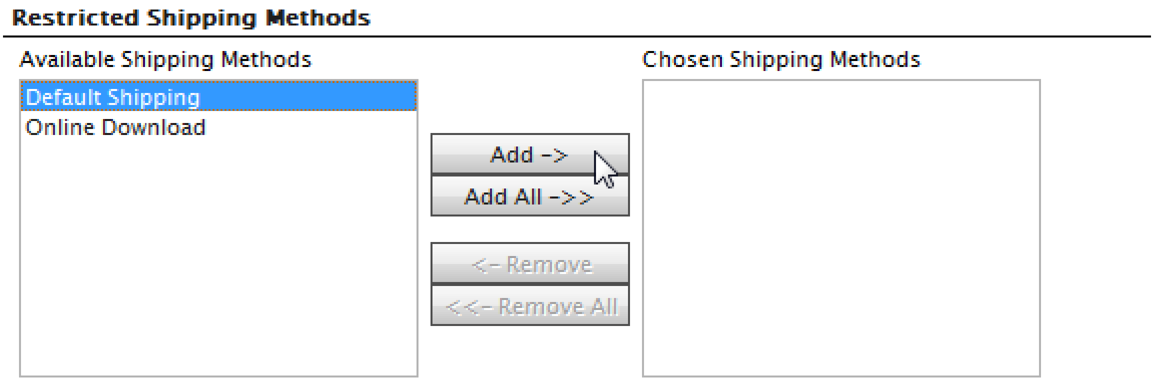
To create a new **Payment Method**, click on **New** to open the **Payment Method Edit** screen.

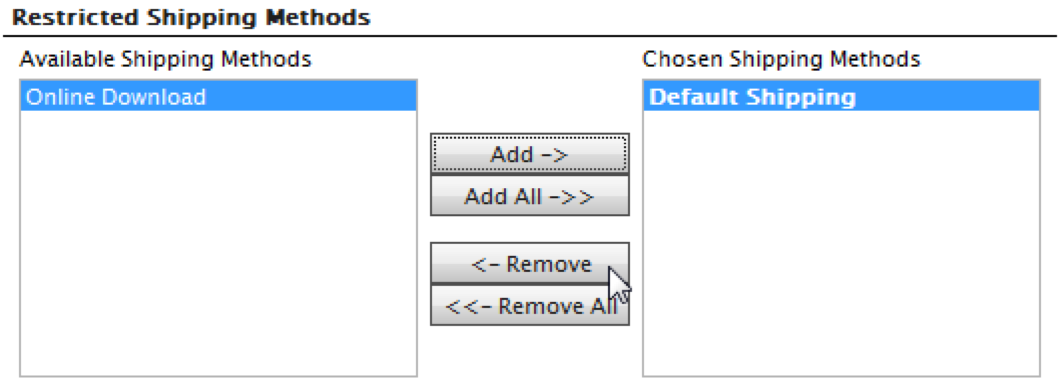


Here is an explanation of some of the gateway properties:

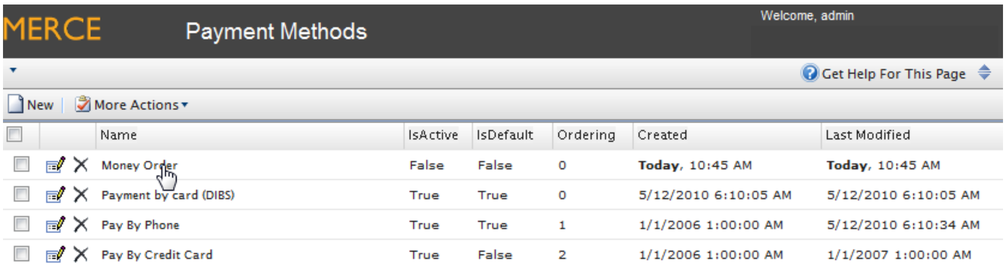
- **ID** – the system-assigned unique identifier for the payment gateway
- **Name** – the name to be displayed to the user
- **Description** – a description that can be displayed to the user
- **System Keyword** – the unique name for each instance of the gateway; new non-unique key-words will not save 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 imple-mented out of the box and requires a developer to complete the functionality.





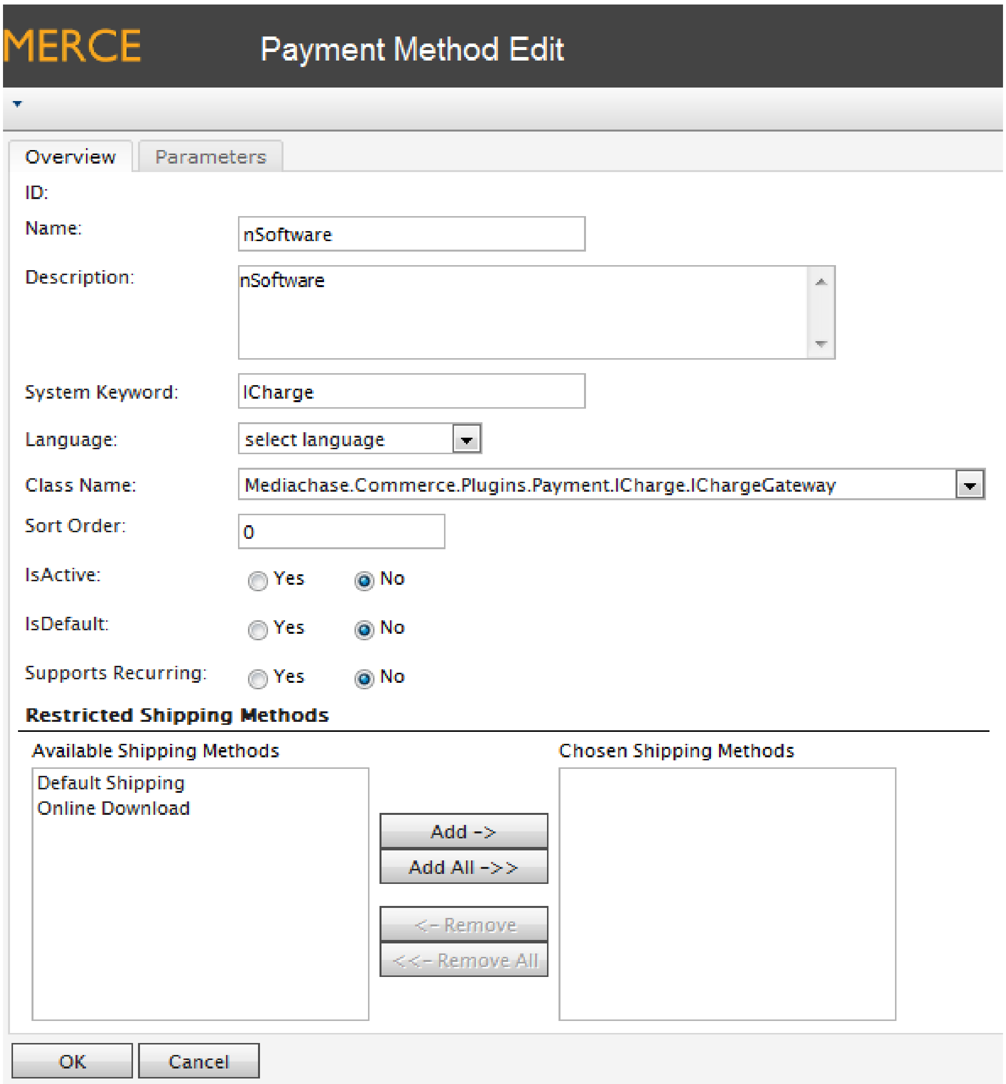
Click **OK** to save the **Payment Method**. The payment method will appear in the list of Payment Methods.



Using nSoftware Provided Payment Gateways

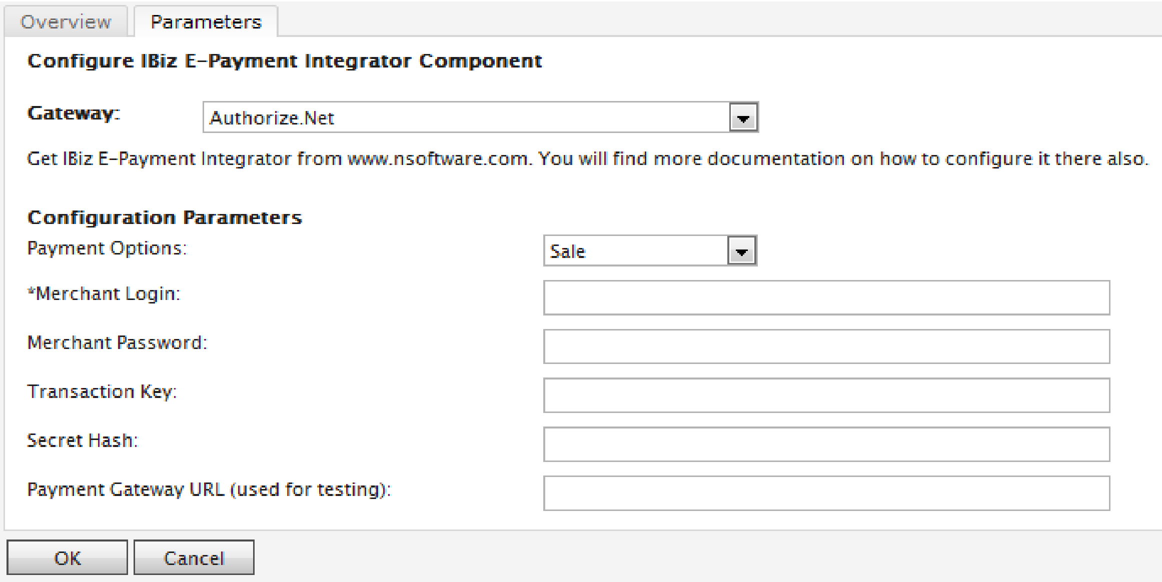
EPiServer Commerce supports multiple payment gateways out of the box using **nSoftware** where new payment methods can easily be set up by end-users.

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 drop-down 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.



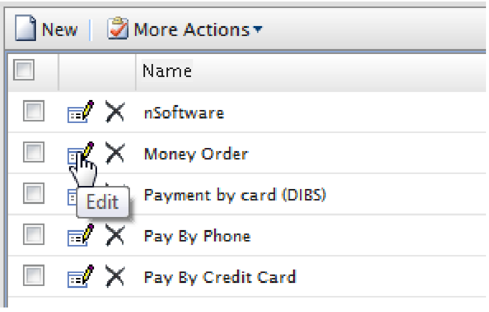
Once created, click on the payment gateway again to go back to the **Payment Method Edit** page. Click on the **Parameters** tab.

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.**

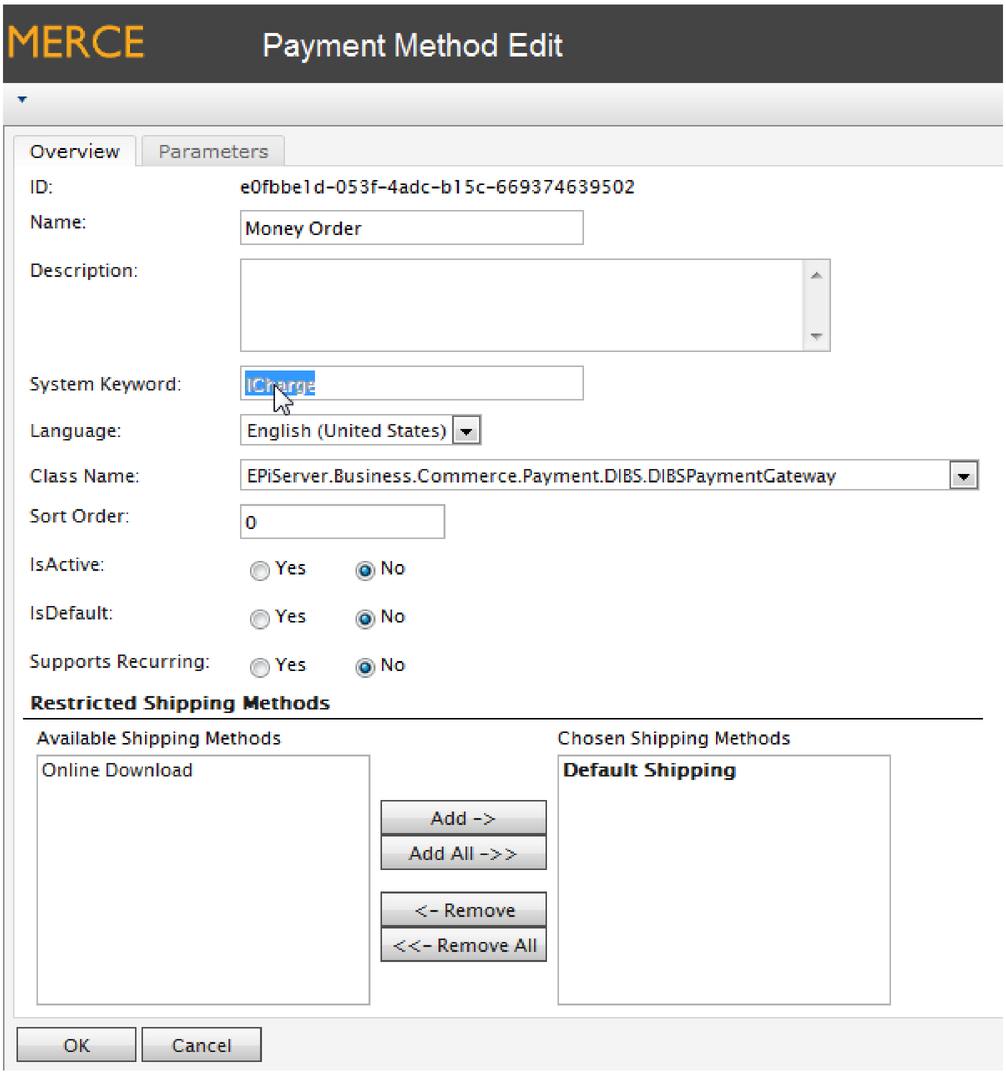


Editing Payment Methods

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



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



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 drop-down menu. Click **OK** when the popup appears.

Shipping

Introduction

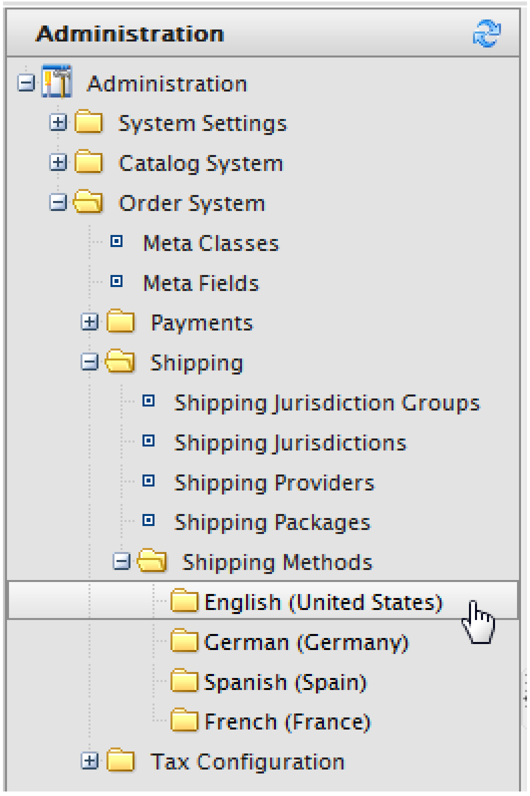
Shipping involves everything related to the actual physical delivery of products to e-commerce customers. Just as for *payments*, you can set up shipping methods, gateways and providers. In the following the terminology is described as well as the different configuration possibilities for shipping.

There are two options out of the box for shipping gateways:

- Generic Gateway (flat shipping rate)
- Weight/Jurisdiction Gateway (base price + additional fee depending on weight and shipping location)

These are starting points to create customized shipping gateways. For more information refer to the Developer Guide for EPiServer Commerce.

The shipping administration is available under **Administration**, **Order System** and **Shipping**.



Shipping Methods

A ***shipping method*** manages a set of information and rules that determines the shipping cost and displays it on the front-end 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", UPS will be used by default.

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

A shipping **gateway** is the specific class that you select (Generic Gateway or Weight/Jurisdiction Gateway). 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, for instance for a "county".

Shipping Jurisdiction Groups

Group of jurisdictions; this is required because this is a required field when configuring the Shipping Method parameters, for instance for a "region".

Shipping Methods

Introduction

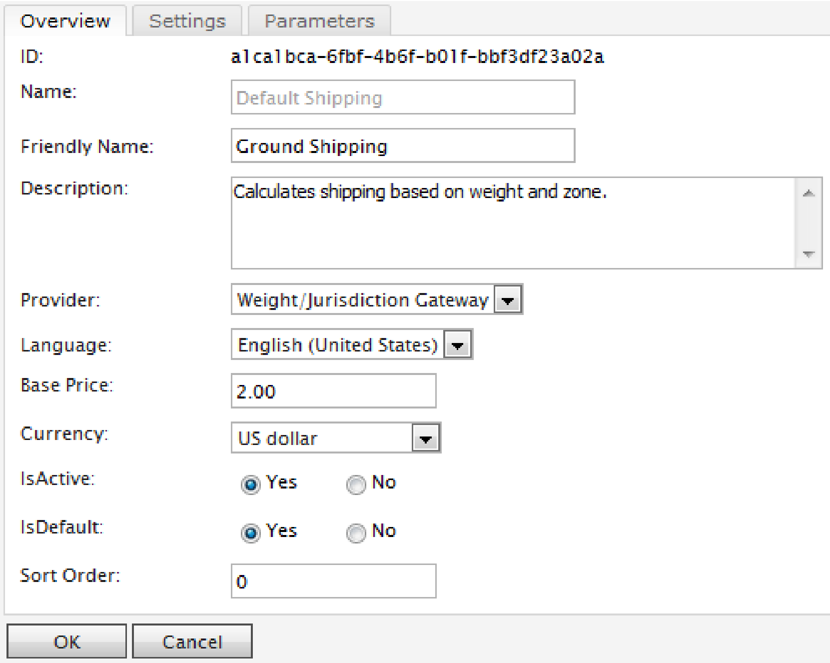
A **Shipping Method** manages a set of information and rules that determines the shipping cost and displays it on the front-end site while a customer checks out an item from his/her shopping basket. The shipping fee is added to the total price of the purchase.

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.

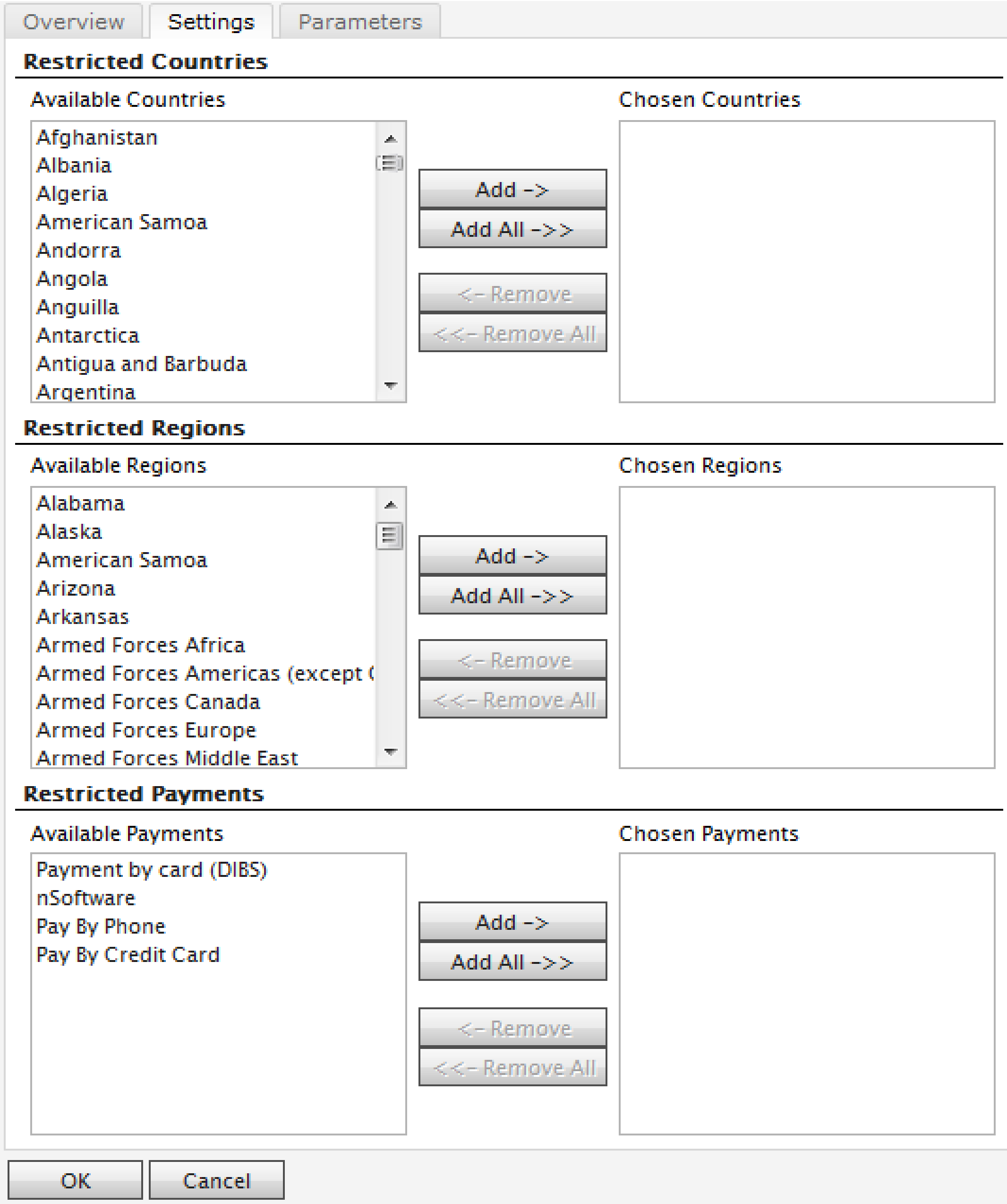
At the **Shipping Methods List** screen, select the edit icon for either of the available methods. The **Overview** tab screen for **Shipping Method Edit** will load with the below fields:



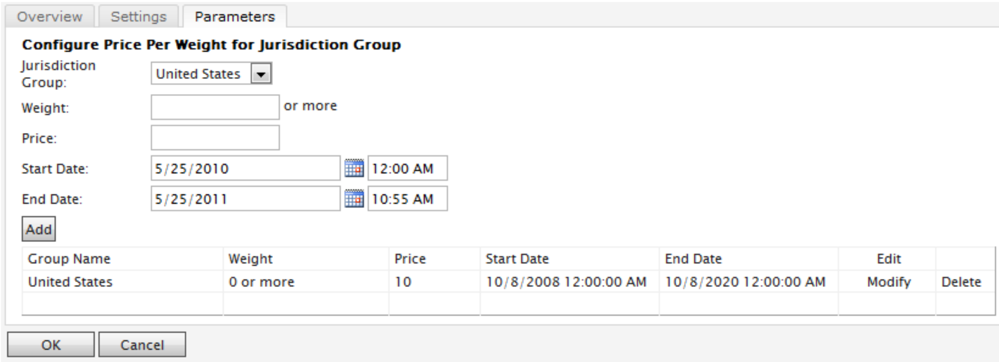
- **ID** - this is auto-generated after saving the new shipping method
- **Name** - enter in a name without spaces or special character; this name will not be displayed in the public site, but is only for end users to manage and organize the shipping methods
- **Friendly Name** - enter a friendly name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



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



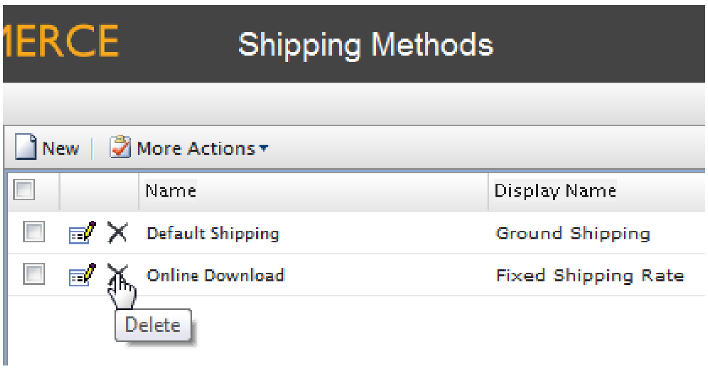
- **Jurisdiction Group** - select a jurisdiction group to apply the current **Shipping Method** using the drop-down menu; the options listed here are set up in the **Shipping Jurisdictions** and **Shipping Jurisdiction Groups** screen.
- **Weight** - enter a numerical value for the weight; units for the weight is set in the *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

Introduction

A **Shipping Provider** is the actual shipping service such as USPS, UPS, or FedEX. However, a provider can also be a type of shipping in order to determine shipping price. 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.

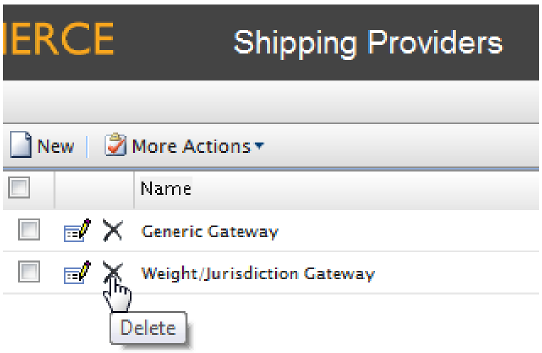
1. Edit **Name**, and **Description**.
2. **System Keyword (no spaces)** and **Classes** are something that your developers need to code and provide.
3. Click **OK** to save changes.

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 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:

- Creating/editing each tax control manually
- Importing all data using a CSV file.

In the following we will provide a few examples to demonstrate how this works.

Taxes are configured

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 at *MSDN site Table of Language Culture Name, Codes, and ISO Values Method [C++]*. 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.

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 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 Juridiction
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

Order Meta Classes and Fields

Introduction

Using meta classes and meta classes, it is possible to extend the meta data of catalog items and order forms. Meta fields are for adding specific data about an item. For instance, if you create a meta class called "Wine" you will want to add meta fields that are characteristic for wine, for instance "color", "taste", "vintage" and "maturity".

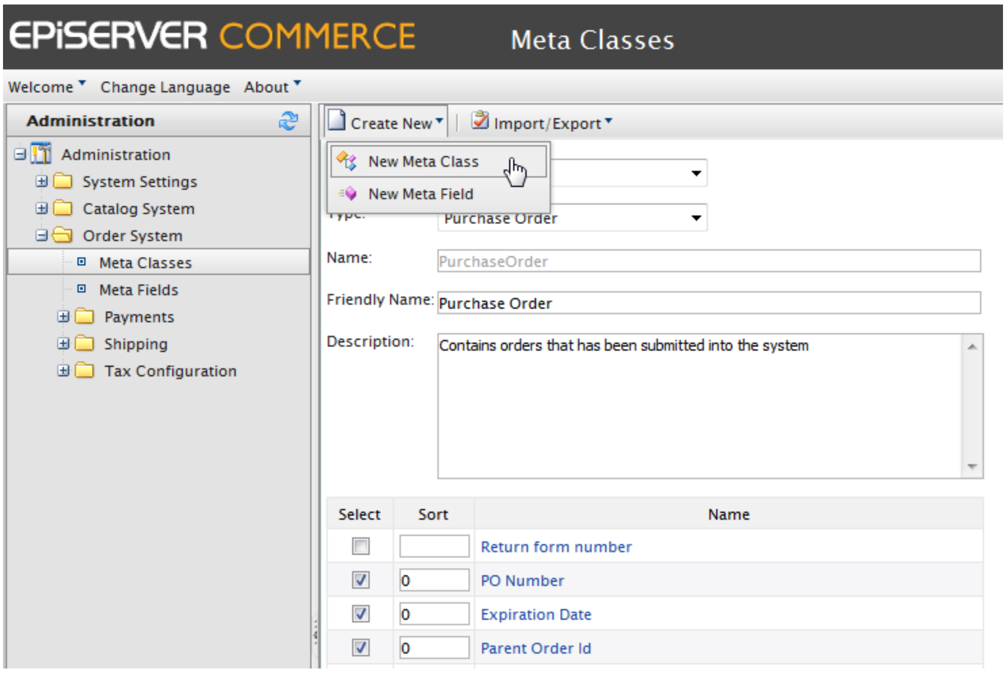
When meta fields and classes have been created in the System Administration part of Commerce manager, they will be available for usage when working with catalog items and orders.

Default order meta fields used by the ordering process are built into the system and are not available. However, you can add your own meta fields to extend the attributes of your orders.

Creating a Meta Class

Do the following to create a meta class:

1. Navigate to **Administration**, **Order System** and select **Meta Classes**. This will open the **Meta Classes** page.
2. Click **Create New** and select **New Meta Class**.



3. Enter the meta class details.
   Name - name of the meta class used in your code, this cannot have any spaces.
   Friendly Name - name of the meta class displayed for practical use in Order Management.
   Description - description of the meta class.
   Object Type - select **Order Group, Order Form, Shipment, LineItem, Order Group Address or Order Form Payment**.
4. Click **OK** to save your changes.
5. You will now see that your newly created meta class is available in the drop-down for **Type**.

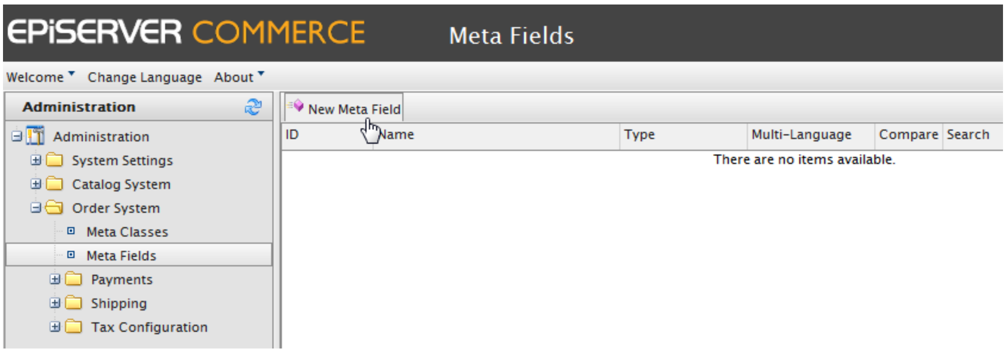
If you select the meta class you will see all of the available meta fields listed below, but with none selected. Next steps will be to create and apply desired meta fields.

Creating a Meta Field

Do the following to create meta fields and customize the attributes of an order meta class:

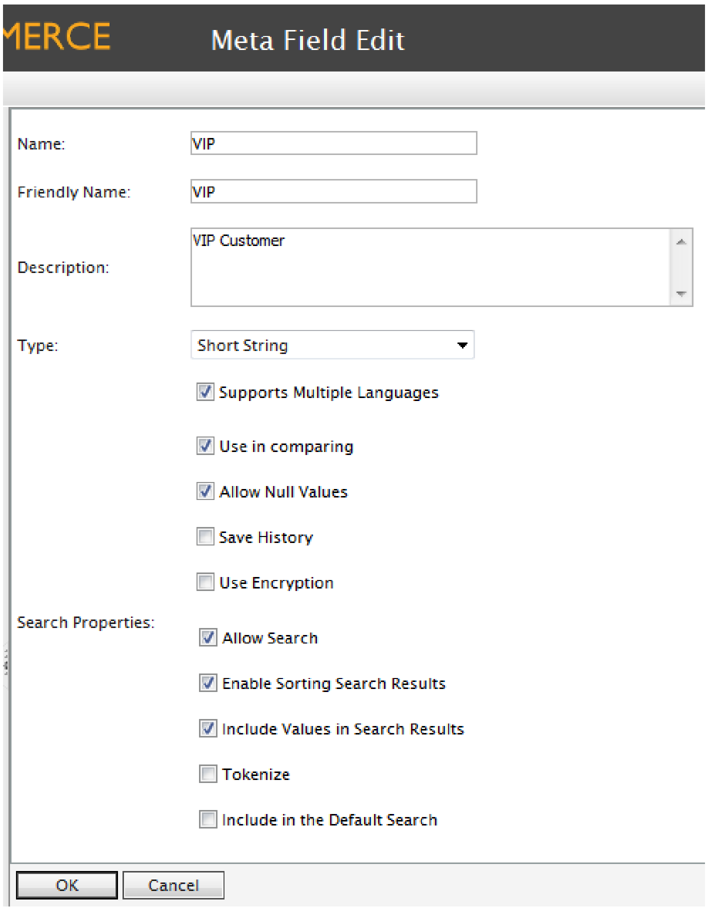
1. Navigate to **Administration**, **Order System** and select **Meta Fields**. This will open the **Meta Fields** page.

2. Click **Create New** and select **New Meta Field**. Click on **New Meta Field** and the meta field edit page will appear.



Alternatively, select **New Meta Field** from the **Create New** drop-down within the **Meta Classes** page.

3. Enter **Meta Fields** details.



Field	Description
Name	Enter a system name without spaces or special characters for example "Num-berMegapixels".
Friendly Name	Enter a user-friendly name seen by end-users on the back and front-end.
Description	Enter any additional information about the meta field.
Type	The drop-down menu shows the field types you can use for the meta field. The types available are: - datetime

	- decimal - float - money - Integer - Boolean - Date - Email - URL - Short String - Long String - Long Html String - String Dictionary - File - Image File - Dictionary
Search Properties	Depending on the data field type selected, you may have the option to set the search properties of the data field. The options are: - **Allow search** - allows for searching directly on this meta field. - **Enable Sorting Search Results** - search results will be sorted on this meta field. - **Include Values in Search Results** - when the search results is returned, the original value of this meta field will be included with the search results. - **Tokenize** - search is prepared for individual words in, for example a long product description property (word breaking). - **Include in the Default Search** - feature which tokenizes and combines meta field values for search from the front end site.

4. Click **OK** to save your changes. The newly added meta fields will be listed in the meta fields list.

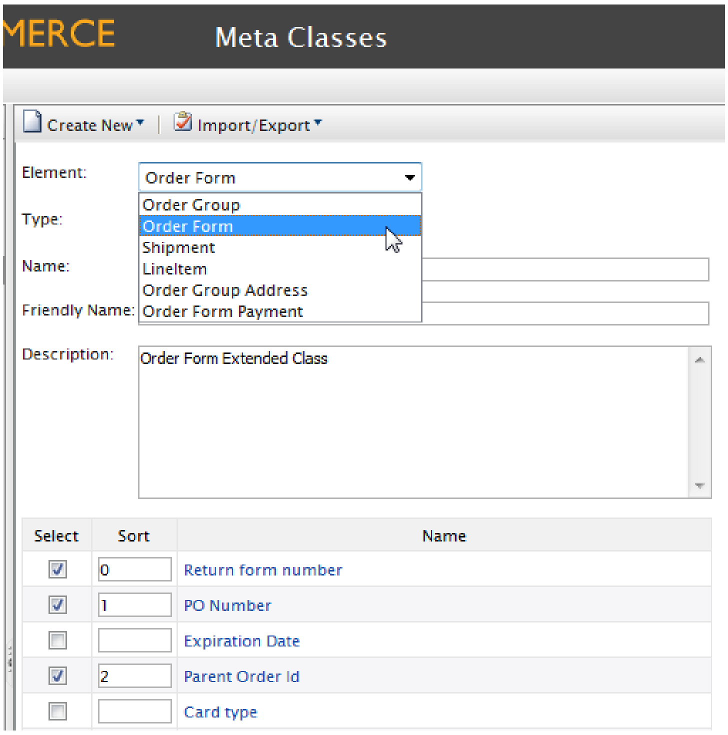
If newly created meta fields are not immediately visible, go to the next page or set the **Page Size** to display more entries.

Applying Meta Fields to a Meta Class

Do the following to apply meta fields to a particular meta class:

1. Navigate to **Administration**, **Order System** and select **Meta Classes**.
2. Select **Catalog Entry** from the **Element** drop-down menu, then select the desired meta class from the **Type** drop-down.

3. To apply a meta field to a meta class, check mark the box next to the meta field. If you wish to sort the order that the meta fields appear in, enter a number into the **Sort** field.



4. Click **OK** to save your changes.

Access Rights

Introduction

The user administration in EPiServer Commerce is based on **contacts**. A "contact" can be a (registered) customer shopping on the website, as well as a user working with the system, editing website content or managing online store tasks.

Managing users involves both customer contact administration, as well as defining access rights for system users working with *online store administration* in Commerce Manager, and users *working with editorial content*. These may or may not be the same individuals, depending how your organization is set up.

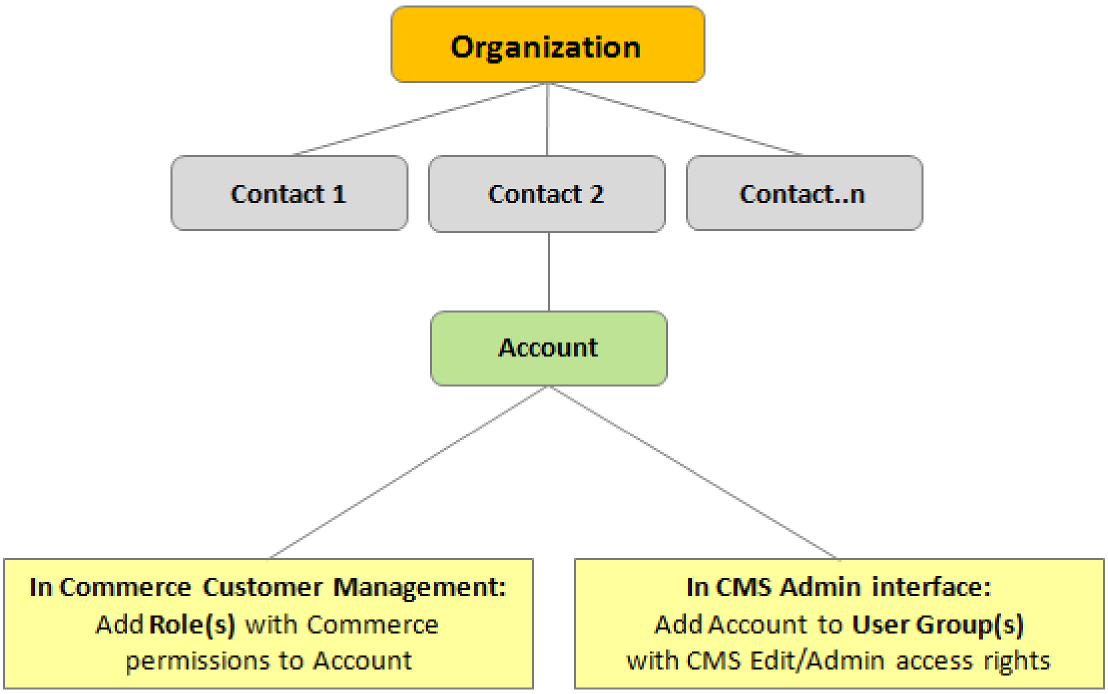
EPiServer Commerce has full support for the standard EPiServer Membership and Role Providers, including Multiplex and Active Directory. This means that users and their access rights are managed in the same way in the system. Refer to the technical documentation for EPiServer CMS for more information on role and membership providers.

Contacts and Accounts

A contact can have an **account** associated with it, which is needed if you want to assign access rights to that contact. Only contacts with associated accounts will appear in the CMS administration interface.

A contact must have an **account** associated with it to in order to be able to apply roles and set access rights in Commerce Manager and the CMS system respectively.

When an online shopper decides to register with the website, a contact with an account is created. However, anonymous shopping is allowed, which means that shoppers are not required to create an account in order to purchase. Contacts can belong to **organizations**. The relationship between organizations, contacts, accounts, roles and user groups, is illustrated below.



Contacts, accounts and organizations are administered from the *Customers system*. This includes managing user accounts and adding roles to users (contacts). Setting access rights for editorial content management in the page tree of the website is done from the CMS administration interface.

The EPiServer Commerce sample site has a number of predefined users, roles and groups both for administering e-commerce tasks as well as managing editorial content. Remember that these users and groups are only examples of how you can set up access rights for your website.

Defining User Access

Introduction

Users can be created either from the **CMS Admin mode**, or from the **Contacts** section under **Customer Management** in Commerce Manager. When a user is created in CMS, the user will appear as a *contact with an **account*** in Commerce Manager. However, when a user is created in Commerce Manager, it will appear in CMS only when an account has been created for the user in Commerce Manager.

When a user has been created in the system, you can define the desired access rights, depending on whether the user is going to work with *content in the editorial interface of CMS*, or with *store administration in Commerce Manager*.

Store Administrators

The *Customers* 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** with the following credentials:

- **Username** - "admin"
- **Password** - "store"

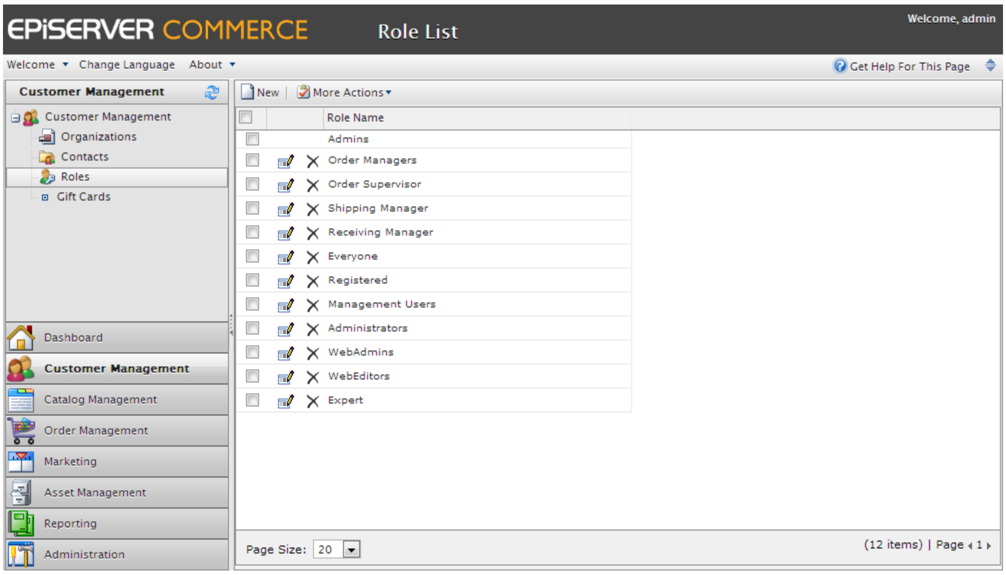
The predefined administration account is given full privileges, meaning it has full access to all systems and all elements within each system. Therefore it is highly recommended that you **change this password after installation**.

Additional accounts used by your internal team to access EPiServer Commerce must have one or more **Roles** assigned to them. A role can be for instance "Catalog Viewers", "Marketing Admins" or "Asset Managers".

EPiServer Commerce 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 the administration interface of EPiServer Commerce.

Predefined Roles

A standard installation of the EPiServer Commerce sample site has a number of predefined roles. These roles are based on common e-commerce working procedures and provides a suggestion to how you can work with the system.



Each role is associated with a range of permissions on different levels, related to the various parts of EPiServer Commerce.

The following roles are available by default, with a set of permissions for each role:

- **Admins** - default role allowing to fully administer most areas.
- **Order Managers** - this role can create returns and exchanges, view and edit orders, send notifications, process payments and split shipments. You can also allow order managers to manage discounts and/or change the line item price.
- **Order Supervisors** - this role has full permissions for the entire order management procedure, including the entire Order Managers permissions.
- **Shipping Manager** - this role allows for viewing, packing and completing shipments.
- **Receiving Manager** - this role can view shipments and receive returns.
- **Everyone** - assigned when a customer registers an account from the front-end public site.
- **Registered** - assigned when you register from an account from the front-end public site.
- **Management Users** - this role allows users access to EPiServer Commerce.
- **Administrators** - this role has extensive administration rights in areas such as assets, catalogs, core functions, marketing and customer and order management.
- **WebAdmins** - this role is EPiServer CMS specific and provides access to the EPiServer CMS **administration** interface, needed when administering the content management parts of EPiServer Commerce.
- **WebEditors** - this role is EPiServer CMS specific and provides access to the EPiServer CMS **editing** interface, needed when working with content on the EPiServer Commerce website.
- **Expert** - this role is used in the EPiServer Commerce sample site for external users that are reviewing products.

You can change the detailed permissions for each of these roles, as well as define your own roles and set permissions, all in order to match the specific working procedures in your organization.

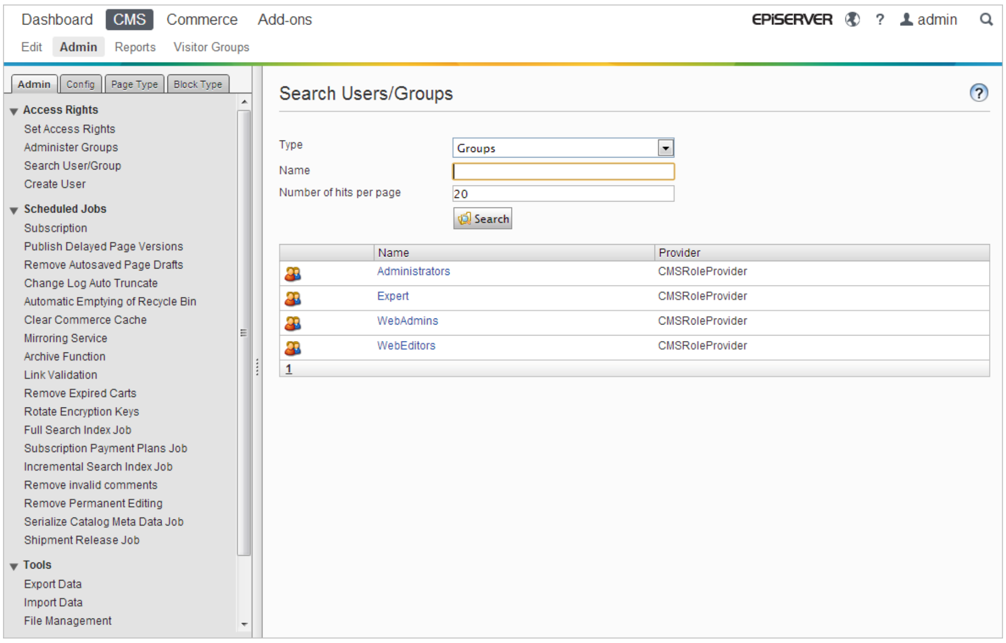
Content Editors

Access rights for content editors are managed from the **Admin** interface in EPiServer CMS. Here you can view all users and user groups under **Search User/Groups**. 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.

There are the following **default** roles:

- **Everyone** - an anonymous visitor browsing to your website. Can only access the View mode of the website.
- **WebAdmins** - membership in this group provides access to the EPiServer CMS **administration** interface.
- **WebEditors** - membership in this group provides access to the EPiServer CMS **editing** interface.

Refer to the EPiServer CMS *user documentation* 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. 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 does not exist in a selected language, a fallback procedure may be applied if this has been configured. Another dimension of globalization is the possibility for users to select different language options for the **user interface** inside EPiServer Commerce.

Find out more about globalization and language management in general on a website in the documentation for EPiServer CMS on world.episerver.com. In this section we will describe in more detail how you work with the different language settings in EPiServer Commerce.

Language Settings

Specific Language Settings

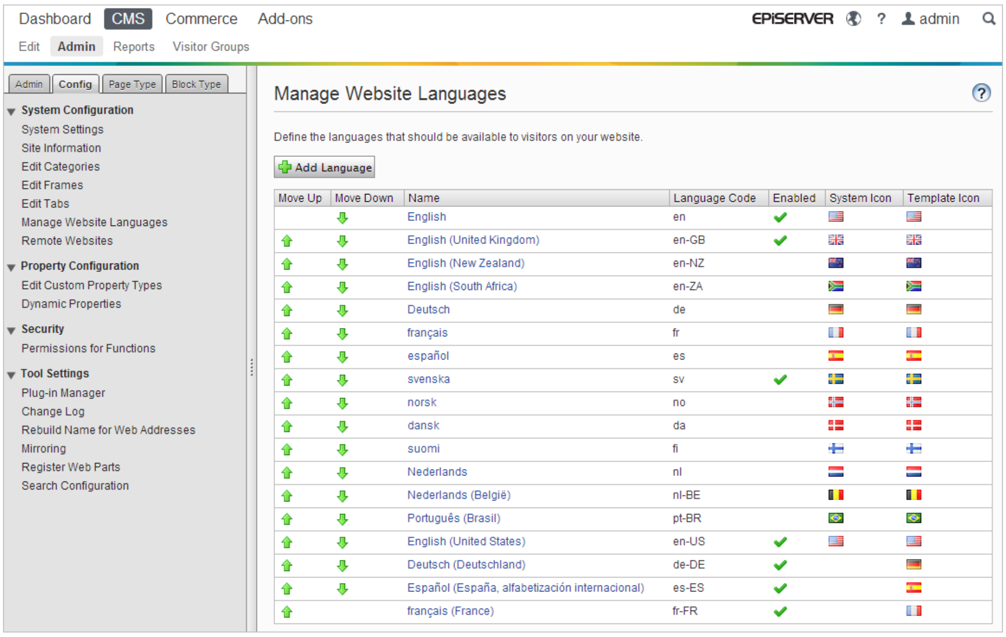
In EPiServer CMS there are three different language concepts, two which are defined by ASP.NET (Culture and UI Culture), and one which is the content language. The ASP.NET Culture is referred to as "System Language", and UI Culture as "User Interface Language". A typical culture is "en-US" which defines 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 EPiServer Commerce database which uses "UI culture" in the matching.

Make sure this is set up right from the start to avoid problems later on. It is recommended that only "UI Culture" languages, i.e. "en-US", "en-GB", "nl-BE" etc., are enabled on the website.

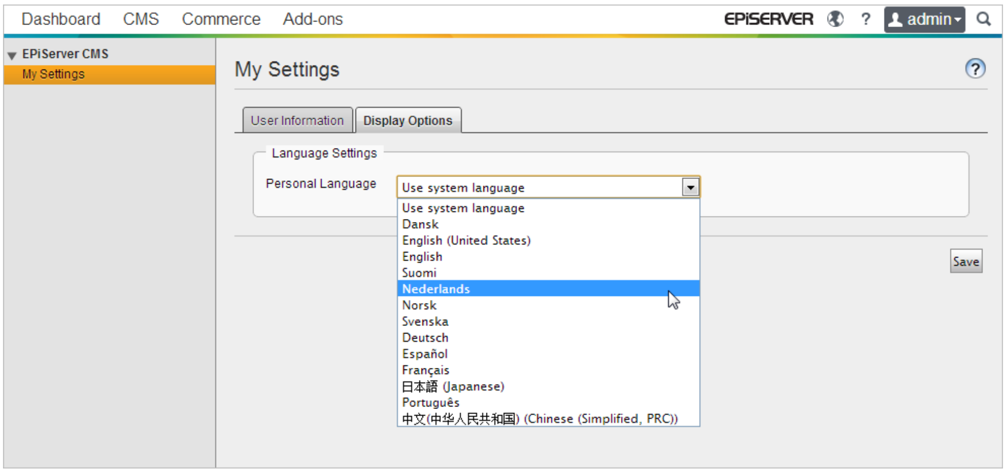
Content Language

To display content in the desired language on your website, you may apply the language management options available in EPiServer CMS edit mode, to create pages in different languages. Available content languages are enabled from the EPiServer CMS Admin mode under **Config** and **Manage Website Languages**. For more detailed information on how the language settings work, please refer to the *user documentation for EPiServer CMS*.

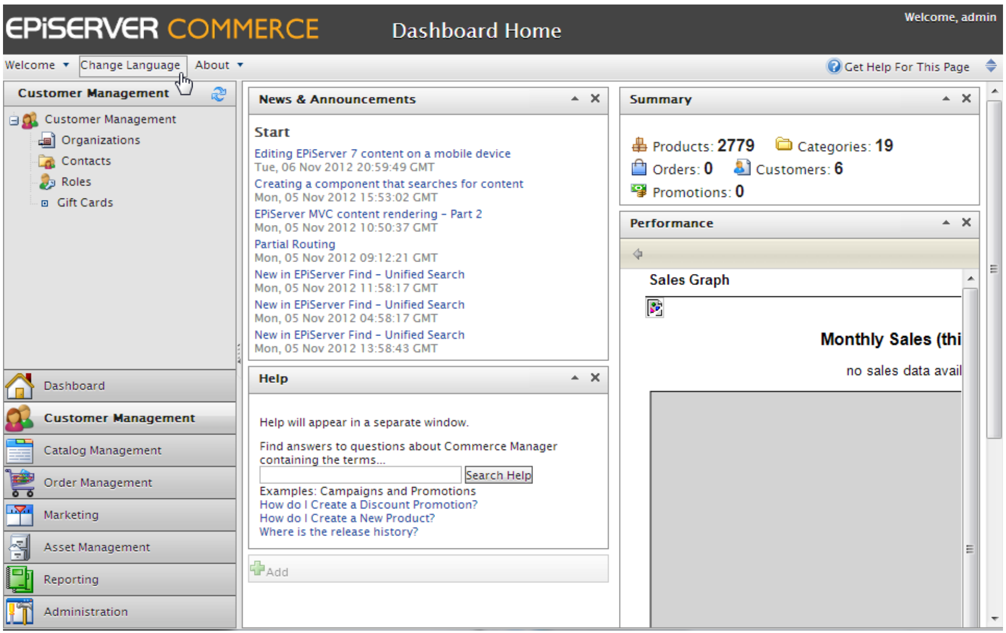


User Interface Language

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 for **EPiServer Commerce**, select **Change Language** in the upper menu of the administrative interface. Choose the language of your choice in the list and click **OK** to save you changes.



Languages for Catalogs

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. Languages for the content of a product catalog, are set when you create the product catalog. Find out more about this under *Catalogs*.

Searching

Introduction

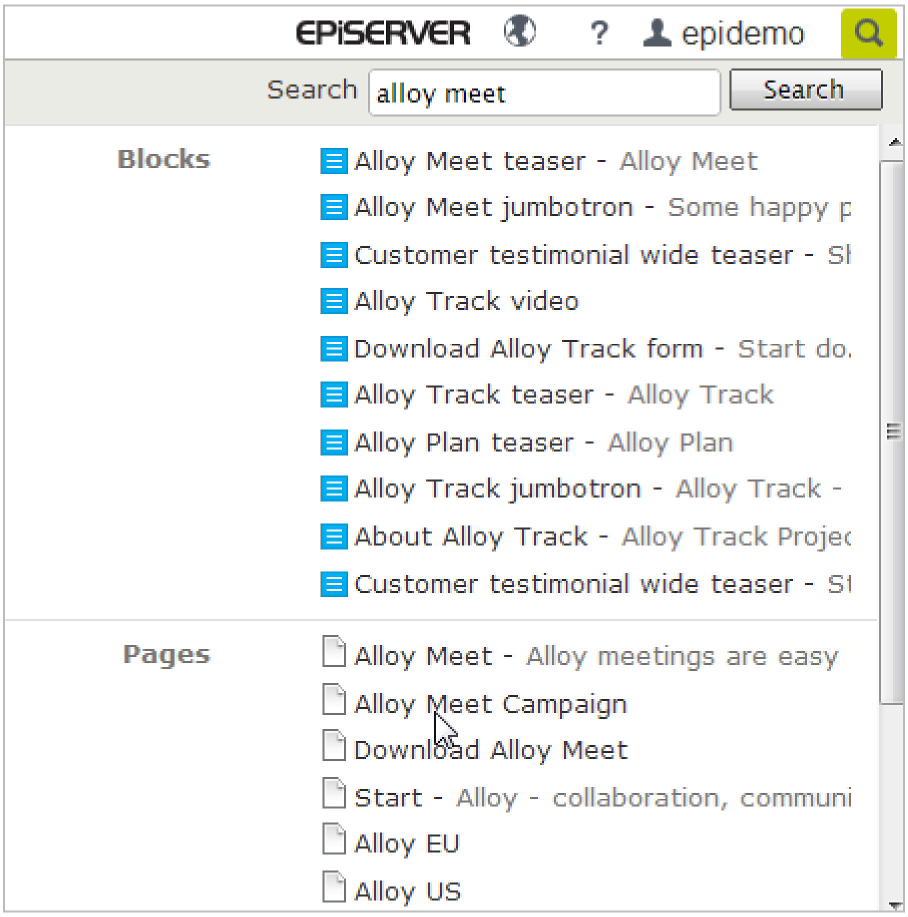
The EPiServer platform has a sophisticated search functionality which allows you to search through different types of content on your entire website. You can search for content pages and blocks, document files, community objects and products. The same search function is used in the global search, as well as for sample search page templates and the file manager in EPiServer CMS. The search can be extended to include results from external systems integrated with your website.

The search results will automatically be filtered based on access rights so that users will only see content they have access to. The search service in EPiServer is based on the open source search engine **Lucene**. The service is plug-able which means that Lucene can be replaced by another search indexing provider.

Accessing Search

The underlying search functionality is used by the different EPiServer products, and the description here applies to standard installations of EPiServer products with their respective sample templates. Visitors to the site will usually access the search through a website **search page** with a search field. The search field is also available in the top menu of the website.

From the top global menu, editors and administrators can access the **global search option** in the upper right corner of the page when logged on to the website.



When hovering over a link in the search hit list, information about the page will be displayed, helping you identifying the correct item. Clicking on a link will take you to the item, for instance an web page or a document file.

How to Search

You can search for web pages with a certain name, and you can also search for pages that contain a certain text string. This means that if you cannot remember what the page is called but remember the first lines of the text, then the page can easily be retrieved. It is also possible to search for a page using its ID number, if you know this.

Search Tips

- Enter a sufficient number of search keywords, usually around 6-8 carefully selected words, separated with a space. Start with fewer keywords and if needed narrow your search by extending the number of words. Example: **episerver product project.**
- When searching for specific phrases, you can combine keywords using quotation marks. Example: "episerver search tips".
- The search function is case insensitive, meaning that you can use both upper and lowercase letters. Example: **New York** and **new york** will both return the same result.
- You can restrict the search by placing a plus sign (+) in front of the words that **must** be found to consider the page a match. Example: **+episerver +search +tips**.
- Similarly you can restrict the search by placing a minus sign (-) in front of the words that **must not** occur to consider the page a match, for example **-episerver -search -tips**.
- To match part of a word, place an asterisk(*) at the end of the word. Example: **word1* word2** will return content with the words **word123** and **word2**, but not **word123** and **word234**.
- The boolean operators AND and OR can be used. AND means "I only want documents that contain both/all words", OR means "I want documents that contain either word, regardless of which one". Example: **episerver AND search** returns documents with both words, **episerver OR search** returns documents with either **episerver** or **search**.

Displaying Search Results

The items in the search result listing will appear based on the ranking they received from the search algorithm.The display of the search results depends on how this is set up on your website, since this can be customized in many ways. Often some kind of filtering is applied which can be based for instance on categorization of content.

Administering and Configuring Search

The search feature has some administration and configuration options which are managed from the **administration interface** in EPiServer CMS. Refer to the administration part of the *EPiServer CMS user documentation* for more information.

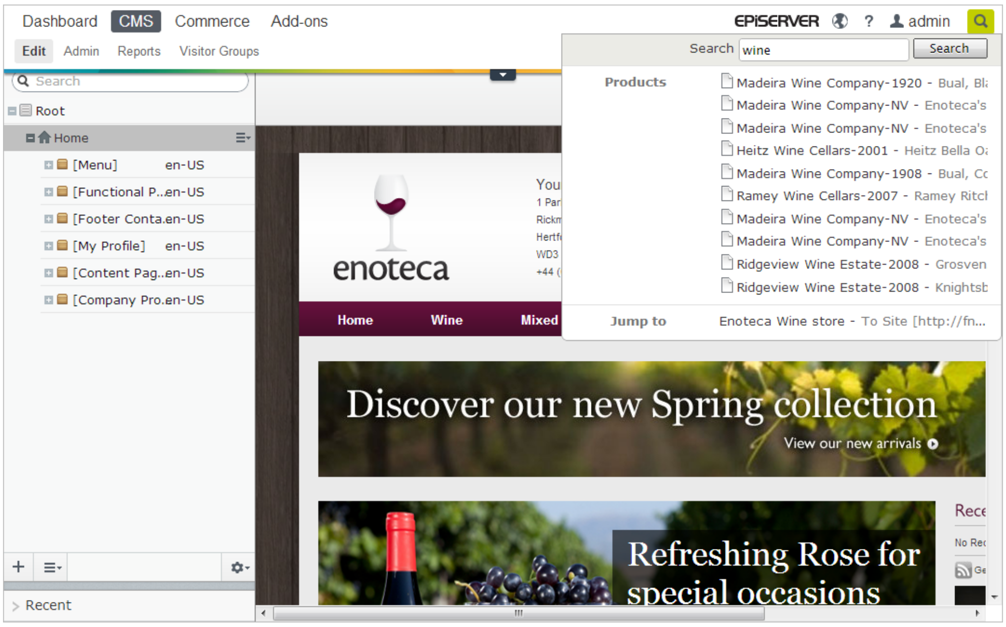
Refer to the *EPiServer Framework SDK* for a technical description of the search functionality, configuration possibilities and the integration interface.

When installing the sample site, Lucene will be the default search provider installed. To find out more about Lucene, refer to the official Lucene website.

Search in EPiServer Commerce

Introduction

The search in EPiServer Commerce is based on the *search functionality in the EPiServer platform*. In an implementation of the EPiServer Commerce sample site, you will notice that, in addition to content pages, blocks and files, products will be included when a search is performed.



The sample site also features ***faceted navigation*** , a features allowing for advanced filtering of products in the product catalog.

It is possible to replace the Lucene search engine with other search providers. Refer to the *technical documentation* for EPiServer Commerce for more information on how to set up search providers.

Related Information

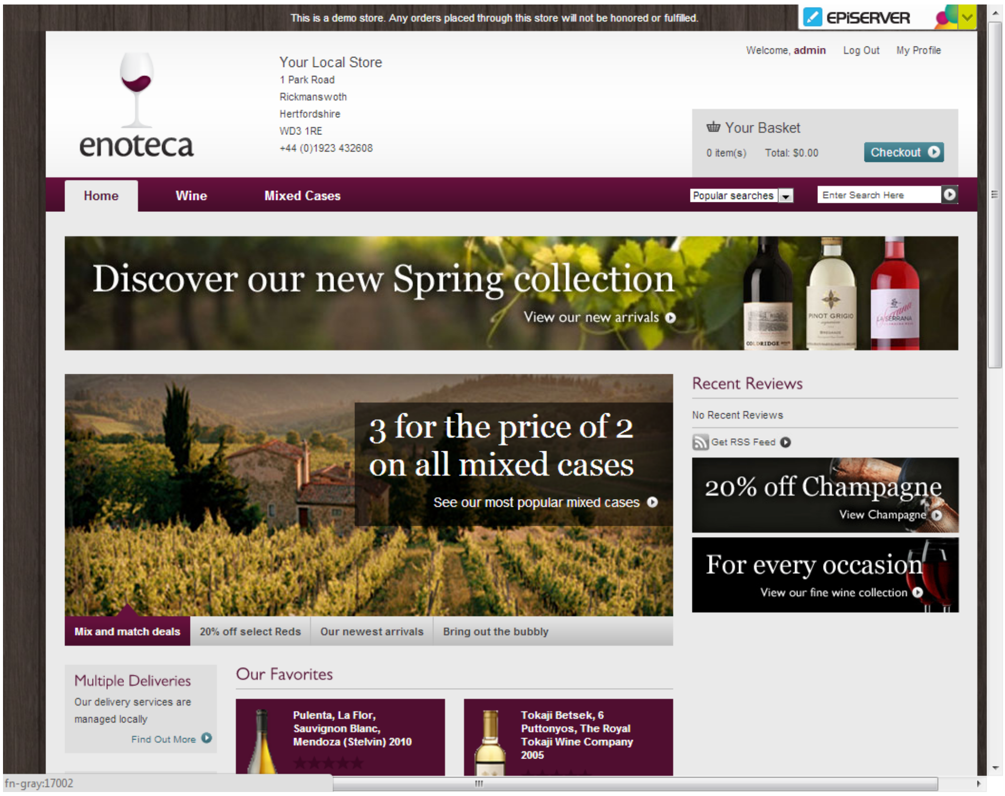
Refer to the sections listed below for more information on related topics.

- *Searching for product catalog entries*
- *Indexing product catalogs*
- *Faceted navigation*

Sample Site

Introduction

The "Enoteca winestore" sample site is a fully functional B2C and B2B e-commerce solution for a mid-size retailer. The templates make use of the built in functionality of the EPiServer platform, and illustrates the many possibilities when creating dynamic e-commerce websites.

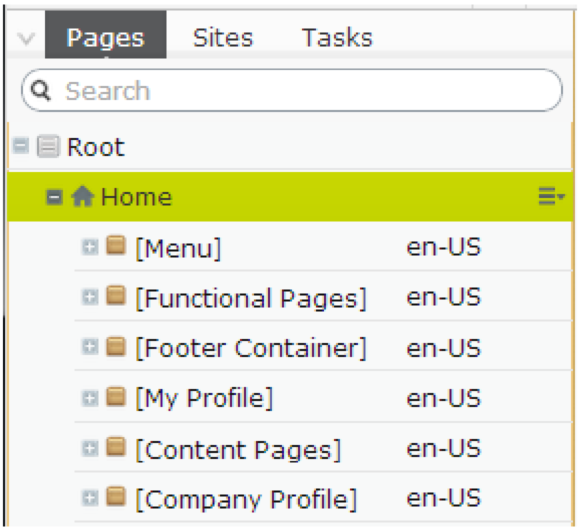


Site Structure

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. Some 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 home page is built using the **Home** page type. The Home 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.
- The main menu navigation is built up by the page structure under **[Menu]**. The products listing is retrieved from the [Resources] section where the **Product Listing** page type which is used for displaying the products, fetching product information from the product catalog.
- The **[Functional Pages]** section of the site structure holds the display templates for a number of general functions such as **Checkout**, **Login** and **Create Account**. These have their own specific page types linking to functions in the Commerce Manager module.
- Editorial content pages are most often based on the page type **Standard Page.** These are pages where editors can create and edit content the usual way in EPiServer CMS. Examples of editorial content are the pages under the **[Content Pages]** and **[Footer Container]**.

- The **[My Profile]** section contains display templates for personal settings for online shoppers. Page types used here are for instance **My Orders**, **My Page** and **Wishlist**.
- The **[Company Profile]** section of the site structure holds display templates related to the B2B part of the sample site. This includes page types such as **Company Order Detail**, **Create Member** and **Company Page**.



Note that some pages will not have a display template for preview, since they are only used as **container pages**. Container pages have a special symbol in the page tree structure. You cannot link to a container page.

Sample Pages

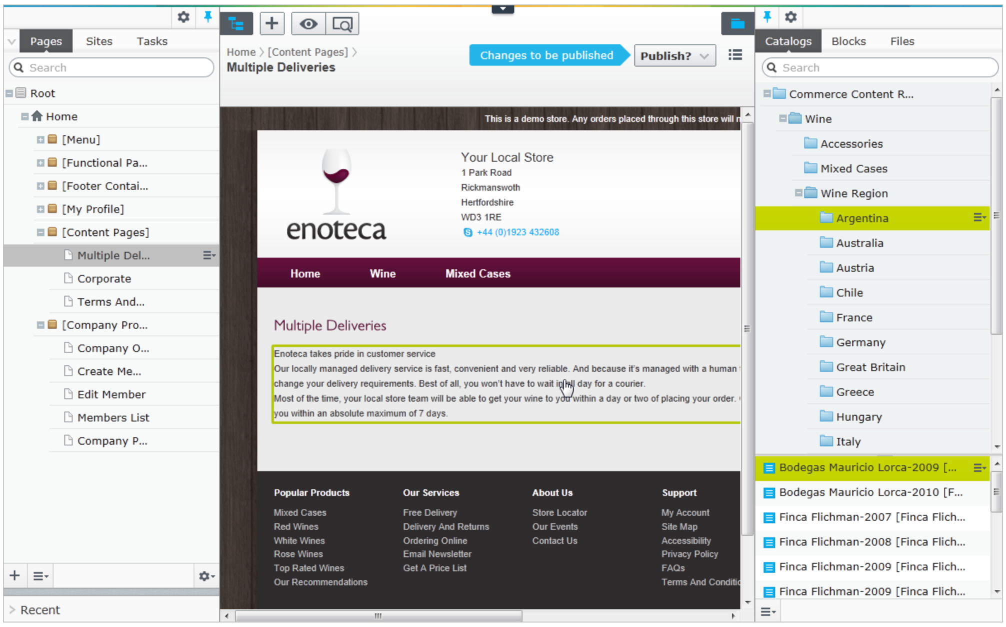
In the following the page templates included in the package are described in more detail, explaining the setup and the possibilities with EPiServer Commerce to both developers and end-users. If you are a developer, you can install Enoteca templates project in your development environment, to explore in more detail how the templates are built.

Page Types

Introduction

Page types contain the **properties** or fields, where editors enter information in a page. Page types will have **content areas** where editors can either type information directly in the area, drag-and-drop pages into the area, or add content **blocks**. When hovering over a content area with existing content, you can see if the content is a block.

Note that this version of the sample site offers only limited possibilities for drag-and-drop of content into content areas. Furthermore, the sample site does not contain any sample block types.



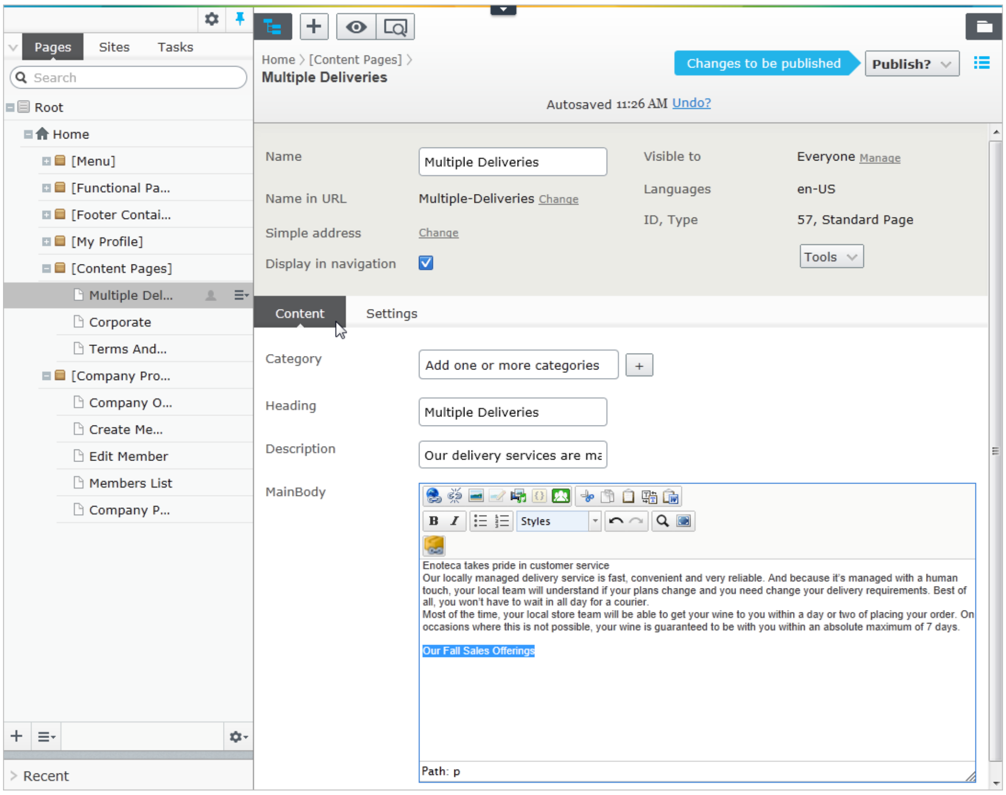
Page properties can be edited both through **direct on-page editing** or **forms editing**. However, some properties will only be available for editing through forms editing. Hover over the content area to find out which properties you can edit directly in the page.

The right-hand side pane of the sample site displays the **Product Catalogs**. With this feature it is possible to expand a catalog node to display products, and drag-and-drop a product into the content area of a page.

Note that in this version of the sample site, you can only drag-and-drop products into content areas of the *Home page (start page)* of the site.

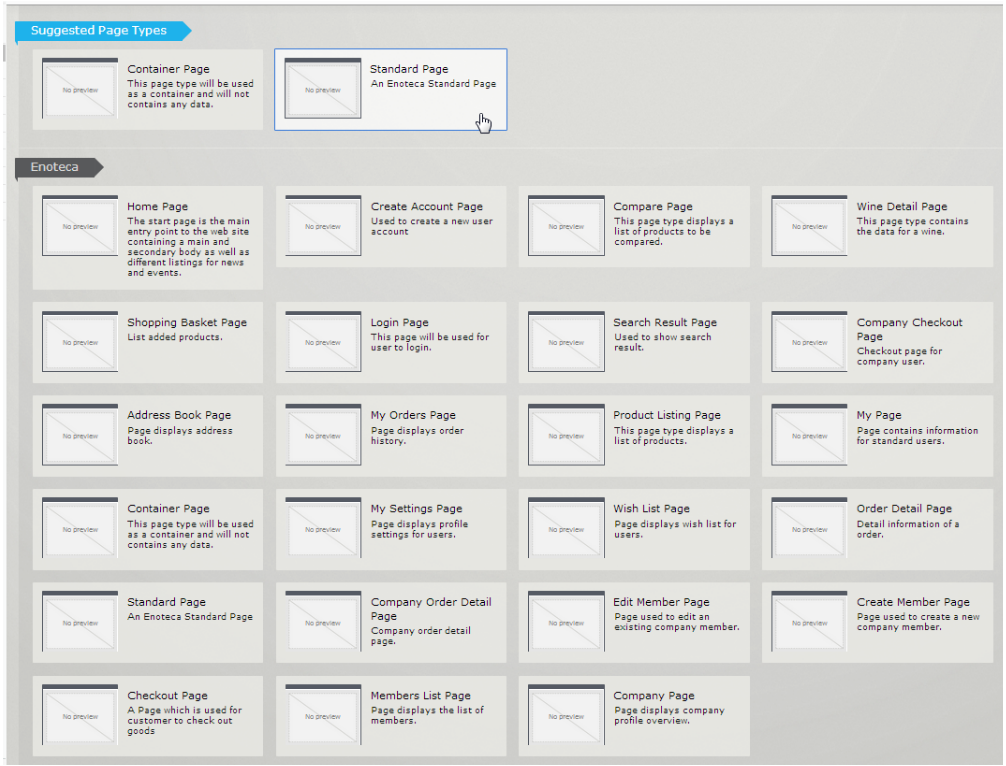
Content Editing

The editorial content is mostly added under the **Content** tab in Forms Editing. The specific properties available under the Content tab, will differ depending on the page type. For instance you can have a Main body property providing all the functionality of the EPiServer CMS editor. The **Category** field, used for categorizing the content, is available for all page types.



Sample Page Types

The sample site has a set of page types for specific purposes, with built-in functionality. Available page types on a site can be categorized to make selection easier for editors. Note that not all page types existing on a site may be available for selection in edit mode, and not all page types may be available under a specific node in the page tree. The availability of page types in edit mode can be controlled from the EPiServer CMS administration interface



In the following sections of this documentation we will describe the features and specific properties of the page types included with the sample site. Use these sample pages as inspiration when creating your own pages.

The templates, tabs, 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.

Home Page

Introduction

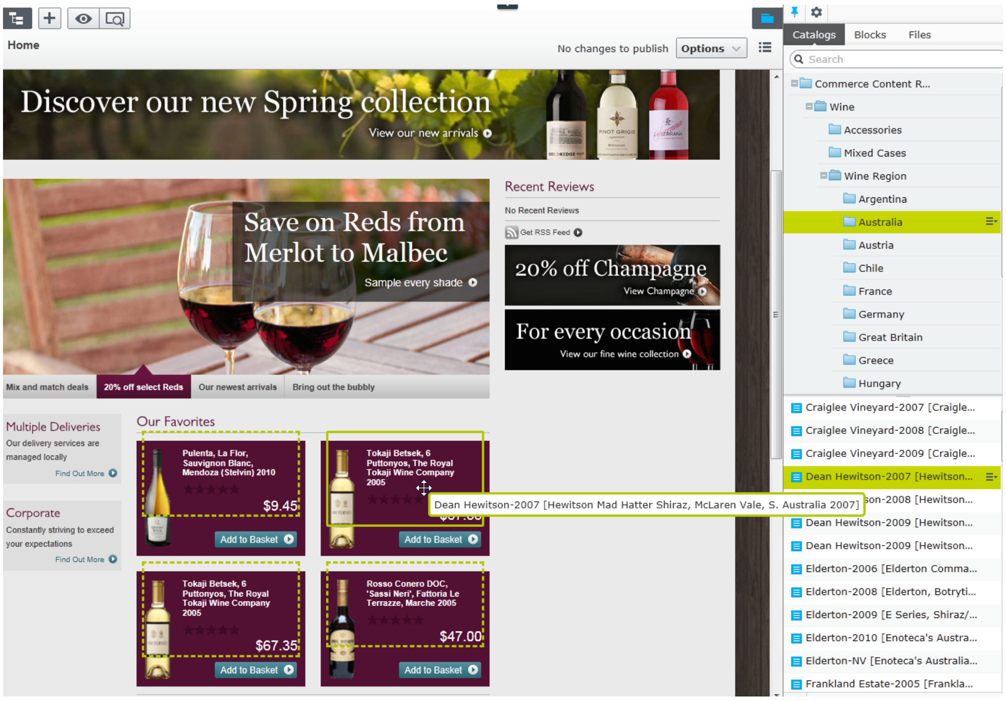
The home page is based on the **Home Page** page type and is normally defined when the website is installed. The page type has no editorial areas, instead most of the content is fetched from other parts of the website. The page type holds a number of settings with references to other pages on the website. The main settings of the home page will most likely not be touched very often after setup of the site. Other parts like special offer advertises and product campaign content may be updated more frequently.

The Home page also has a "carousel" feature where you define a set of images with associated texts and referral links. The *images are selected from the File Manager*, and will replace each other in a continuous slideshow.

Adding Content

Content can be added both through **direct on-page editing** or **forms editing**. However, some properties will only be available for editing through forms editing. When you hover over a content area you can see if it is available for direct editing, and what type of content it is.

Expanding **Catalogs** in the right-hand pane, allows you to drag-and drop specific products into the **Our Favorites** content areas. These can also be *edited through forms editing*.



In the following sections the properties on the various tabs in forms editing will be further described.

Content Tab

Introduction

Below are the properties that can be changed under the **Content** tab for the *Home page* in **forms editing**.

Carousel Feature Properties

The **Carousel** feature allows you to define a set of four images with associated information.

First/Second/Third/Fourth Carousel Image URL

The link to the carousel image, select an image from the File Manager.

First/Second/Third/Fourth Carousel Tab Name

The text on the tab that will be displayed with each image.

First/Second/Third/Fourth Carousel Caption

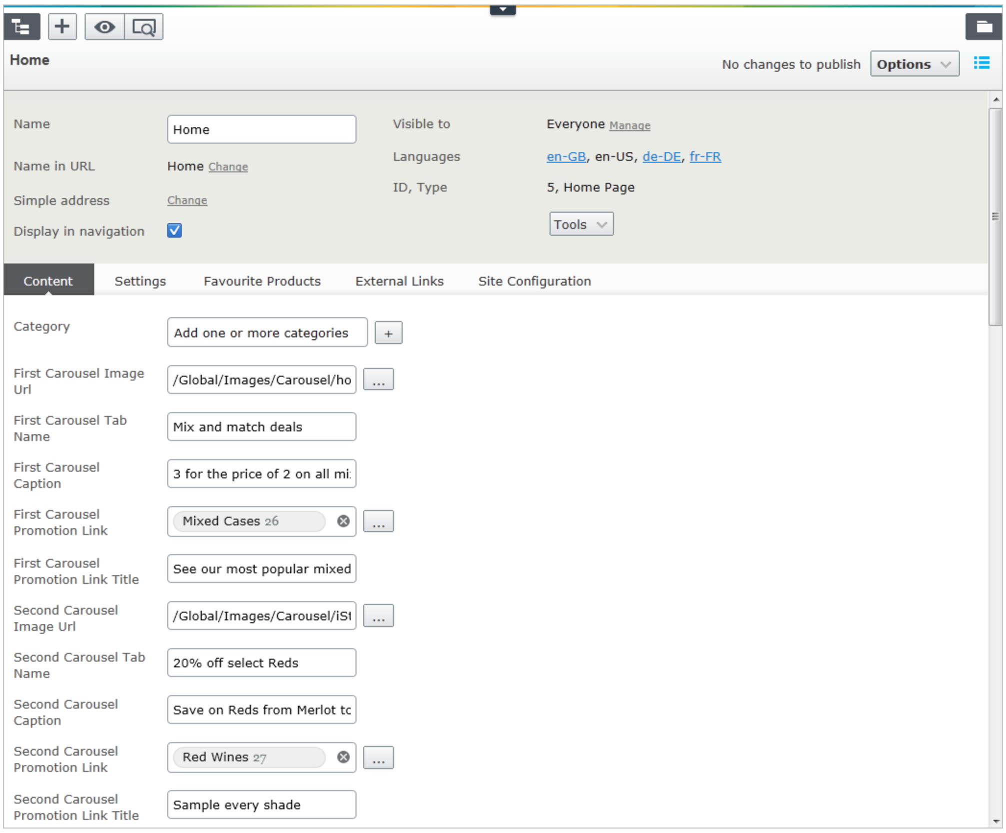
The text that will be displayed with each image.

First/Second/Third/Fourth Carousel Promotion Link

The target link when clicking on a carousel image, select a page in the page tree.

First/Second/Third/Fourth Carousel Promotion Link Title

The text for the link to the selected target page.



Other Properties

Maximum items in you may also like tab

Set the maximum number of items allowed for the display of "you may also like" items.

About Us age

Provides linking to display content from the **About Us** page section stored in [Footer Container].

Deliveries Page

Provides linking to display content from the **Multiple Deliveries** page stored in [Content Pages].

Corporate Page

Provides linking to display content from the **Corporate** page stored in [Content Pages].

Main Advertise

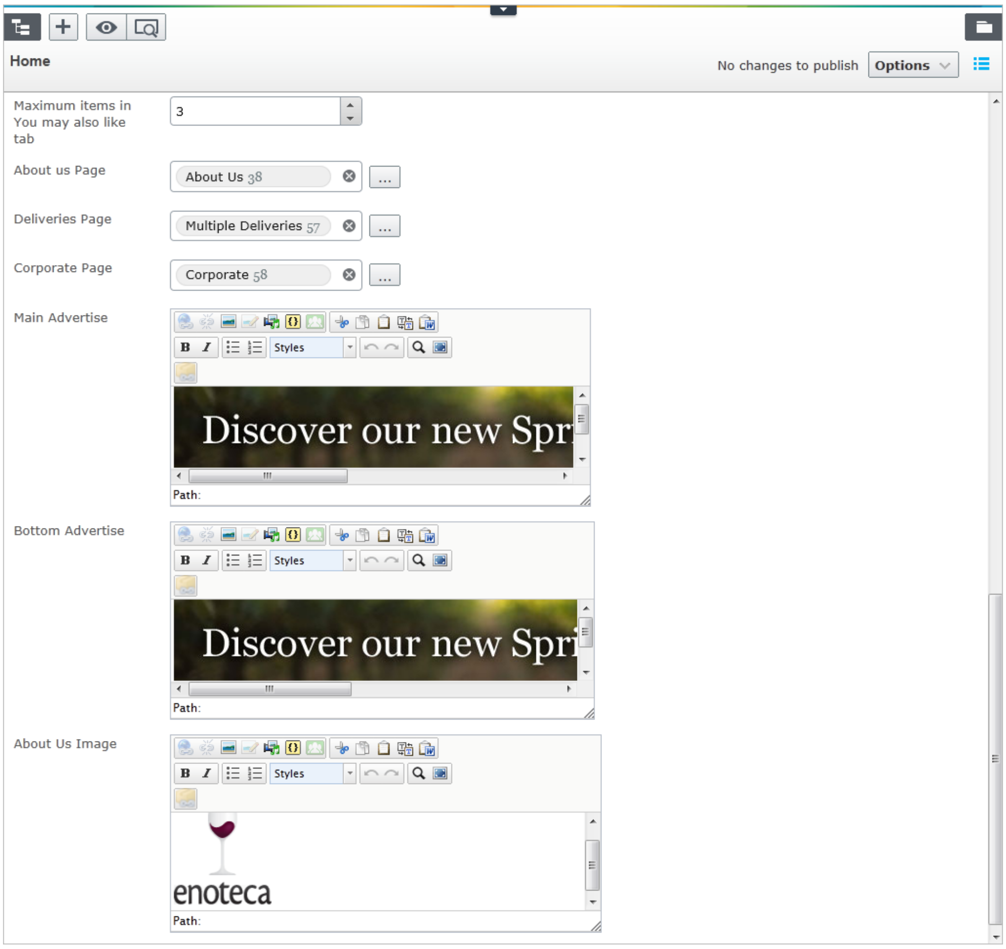
Provides an editor area for adding editorial content to the main advertisement area at the top of the home page.

Bottom Advertise

Provides an editor area for adding editorial content to the advertisement area at the bottom of the home page

About Us Image

Provides linking to an image to be displayed with the "About Us" section on the home page.



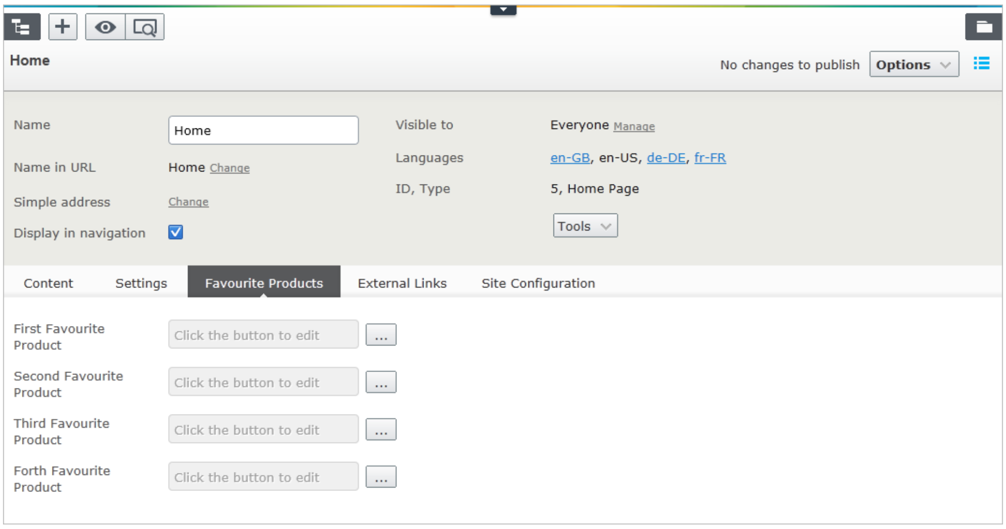
Favorite Products Tab

Introduction

Below are the properties that can be changed under the **Favorite Products** tab for the *Home page* in **forms editing**.

Properties

On this tab you define links to the (four) selected favorite products displayed under "Our Favorites" on the home page. The products are defined using the product link dialog which allows you to chose products from the product catalog. Find out more about this feature in the *Product Picker Property section of the EPiServer Commerce SDK*.



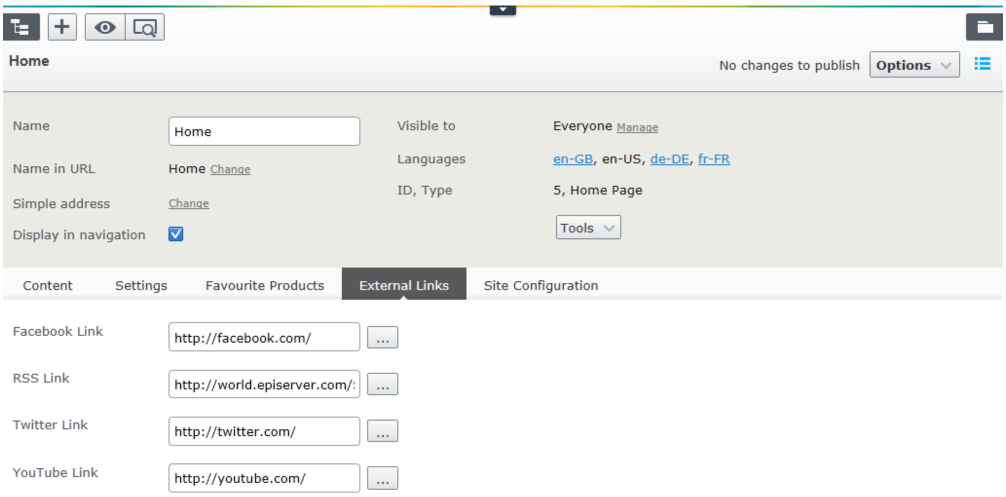
External Links Tab

Introduction

Below are the properties that can be changed under the **External Links** tab for the *Home page* in **forms editing**.

Properties

On this tab you define external links to the link selection displayed under "Follow Us" in the footer section at the very bottom of the home page. The links are defined using the ordinary link dialog tool in EPiServer CMS.



Site Configuration Tab

Introduction

Below are the properties that can be changed under the **Site Configuration** tab for the *Home page* in **forms editing**. The settings here are common website 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.

Here you define settings for both a B2C (consumer) and a B2B (company) scenario. Note that the related function pages must be created first before you can define them on the home page.

Open the home page for editing to change the settings for the different properties. For the page links, select the appropriate page in the page tree structure and save and publish the page to update the settings.

Properties

Login Advertise Image

Here you define the image to be displayed to the right in the login page for the site, intended as an advertising space. Select an image in the File Manager.

Link to Login Page

Defines the *login page* to be used when visitors log in to the website.

Create Account Page Link

This defines the display page for *creating an account* when a shopper registers to the website.

Product Compare Page

This setting defines the display page to be used when *comparing products*.

Search Result Page Link

This setting defines the display page for *presenting search results* on the website.

Shopping Basket Page

This is the page to be used when displaying a *shopping basket*.

Max. Quantity Of Display Entry

Here you define the maximum number of products to be displayed in a product listing. If you have a large amount of products in specific categories, it might be wise to limit the display number.

My Page Link

This page type displays a snapshot of recent *account activities* for a customer.

My Wish List Page Link

This setting defines the wish list page to be used when displaying a *customers wish list*.

Checkout Page

The page to be used when displaying the *check out page* for a customer.

Order Detail Page

Used for displaying the *details for a specific order*, when selected from the My Order page.

My Order Page

This page type displays the *order history* for a specific customer

My Settings Page Link

Here you define the page type to be used for displaying *account details* for a customer.

Checkout Page for Company User

Used for displaying a *checkout page for a company user* in the B2B scenario of the sample site.

Company Page

This page type displays a snapshot of *recent account activities for a company*.

Members List Page

This page type is used for *listing company members*.

Create Members Page

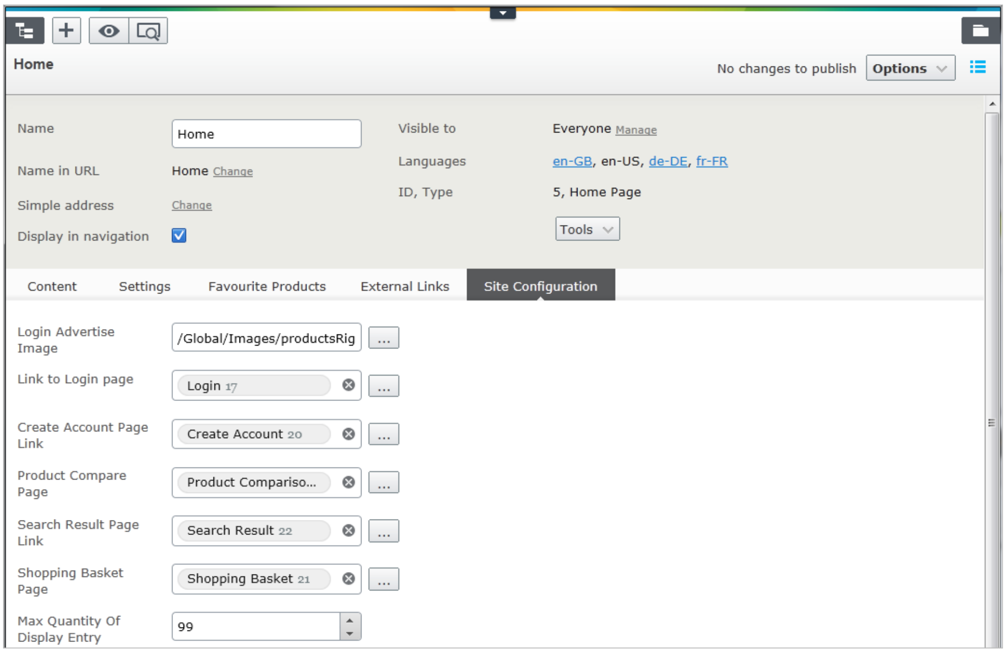
Here you set the display page for *creating a company member*.

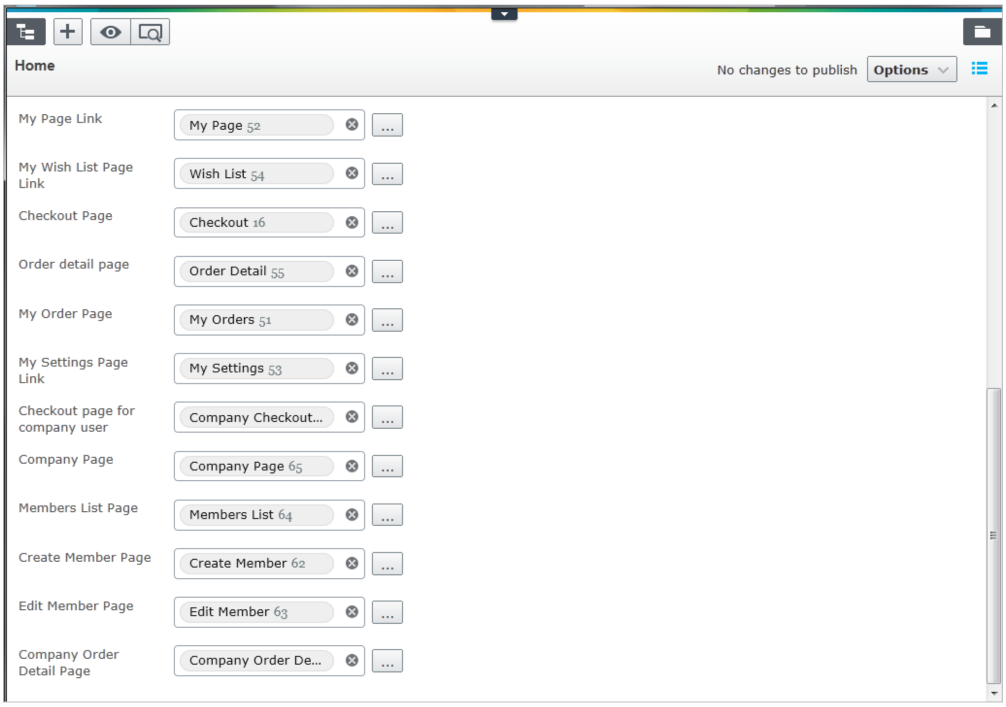
Edit Member Page

This page type is used for *editing the settings of a company member*.

Company Order Detail Page

This page type displays the *details of a company order*.





Each of the page types mentioned here are described in more detail in the following sections of this documentation.

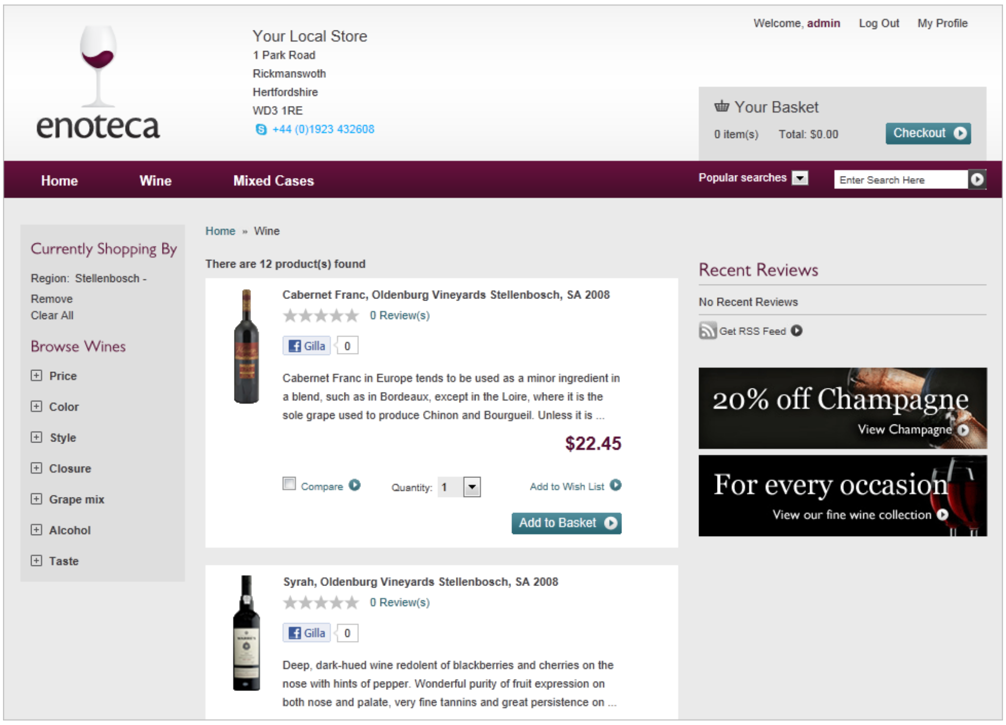
Product Listing

Introduction

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 and will display an image of the product together with information about ratings, reviews and social plug-in features.

In the left column of the page it is possible to filter the product display according to a preset product categories. To the right on the page, information related to selected products will be shown. Under the product listing, the recently viewed products are displayed.

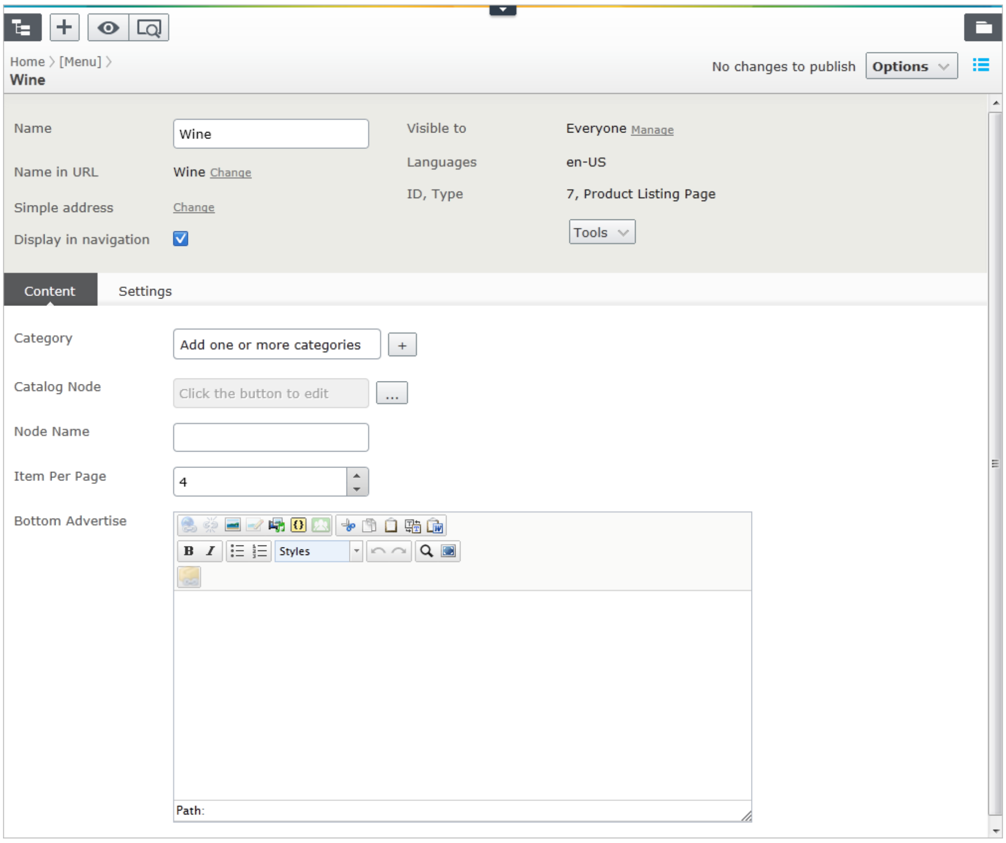
The page functionality also includes a product compare option as well as the **Add to basket** button for each product in the list. You can define the number of items to be listed per page, and a pager feature allows for browsing between the listed pages.



Properties

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 retrieved 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.

In the **Item Per Page** field you can define the number of items to be displayed on each page. The content of the **Bottom Advertise** editor field is displayed at the very left-hand bottom of the product listing page.



Functional Pages

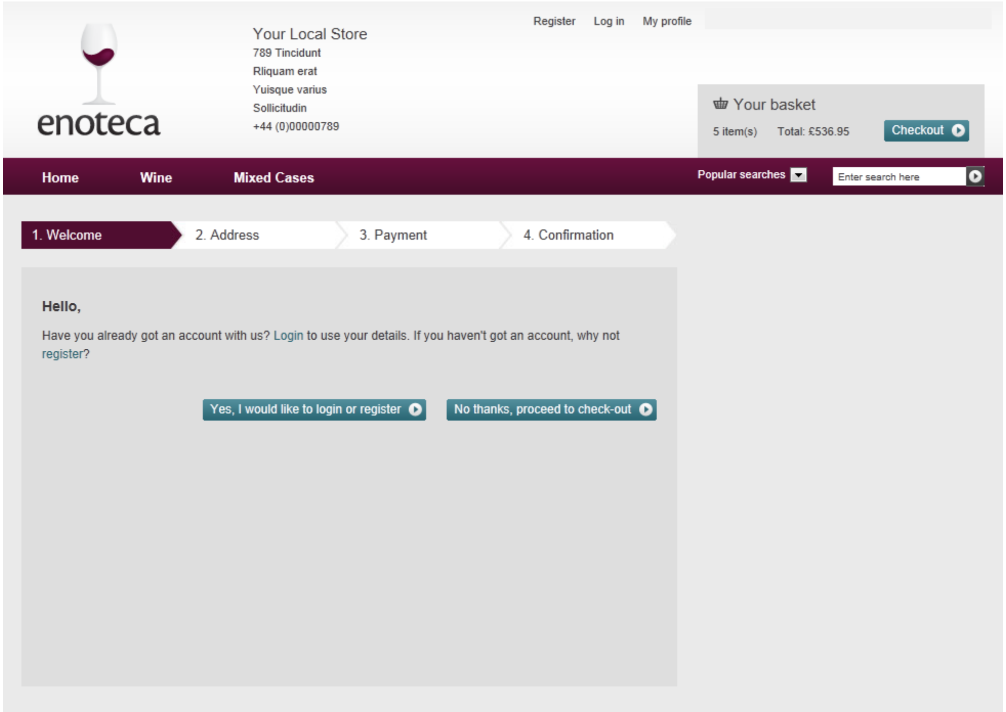
The pages under the **[Functional Pages]** section in the page tree structure of the sample site holds a number of page types with general e-commerce functionality such as login, checkout and search result presentation. These page types are described more in the following sections of this documentation.

Check Out

Introduction

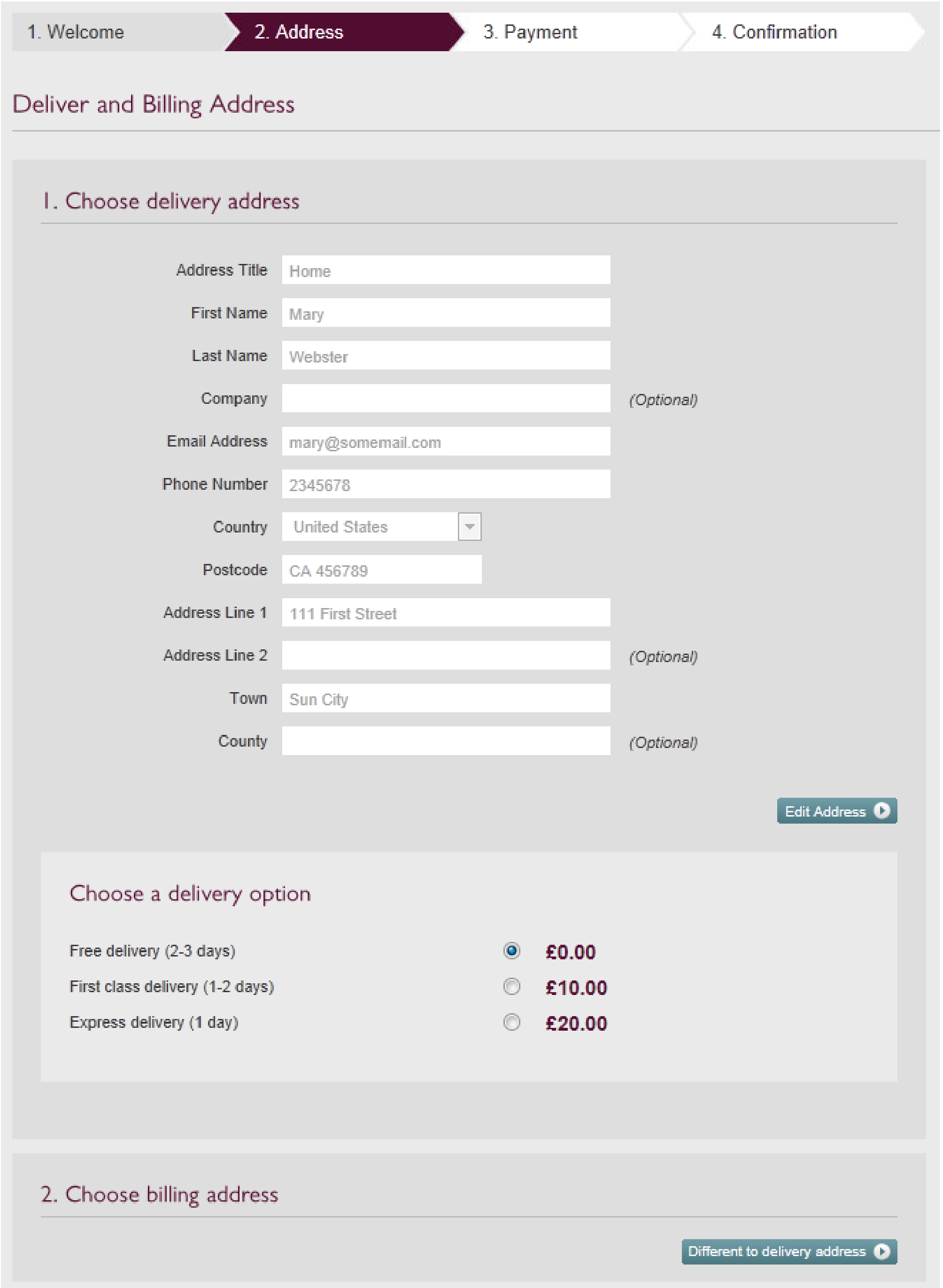
The purpose of the **Check Out** page type is to display the steps of the check out procedure when a customer wants to finalize a purchase.The check out procedure is initiated when the customer selects the **Checkout** option. The checkout procedure may look differently depending on the payment and shipping options defined in the system. On this sample site the checkout procedure has four steps: **Welcome**, **Address**, **Payment** and **Confirmation**.

Step 1: Welcome



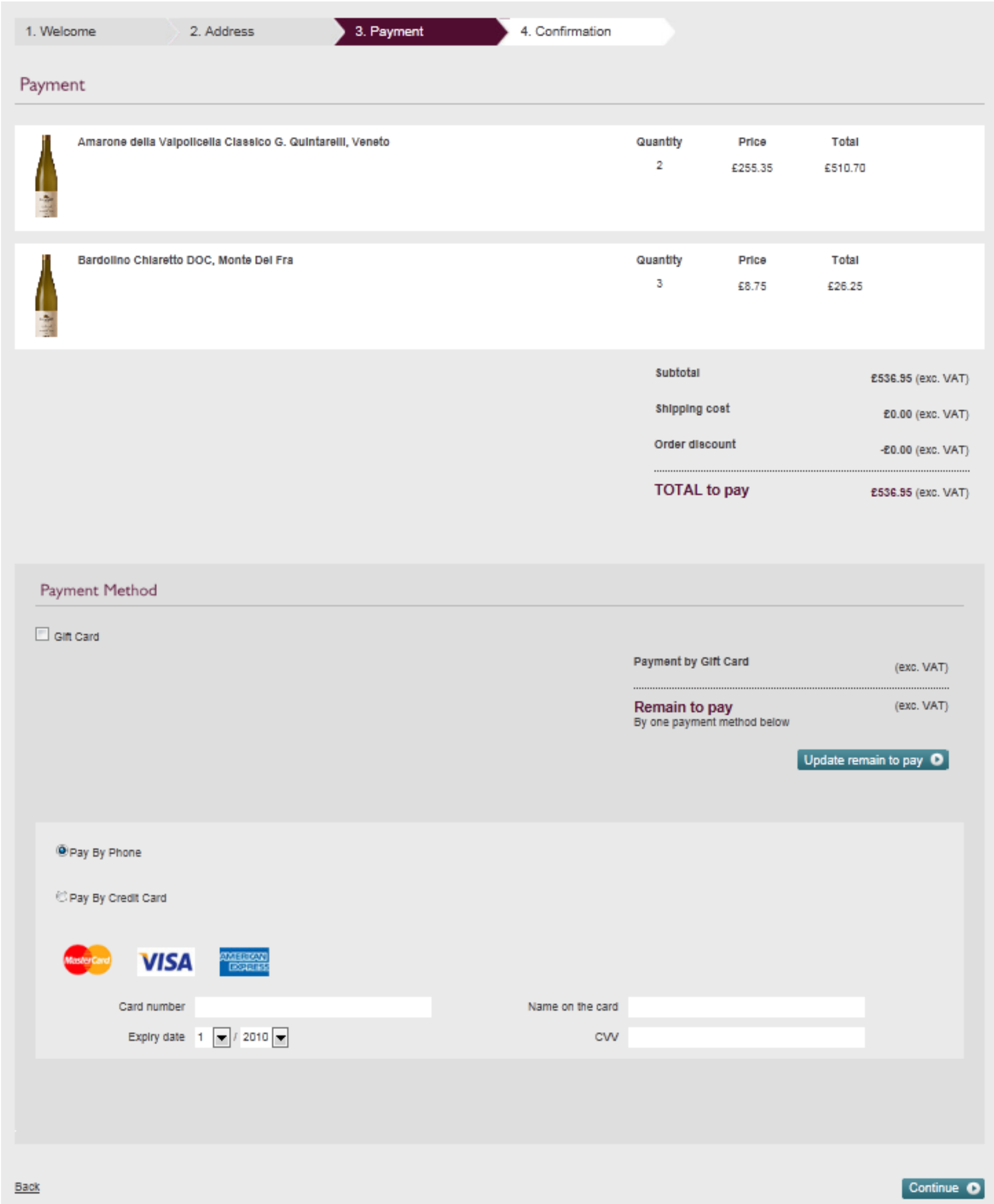
In this first step the customer has the option to either log in or register to the site, or to proceed directly to the next step without registering.

Step 2: Address



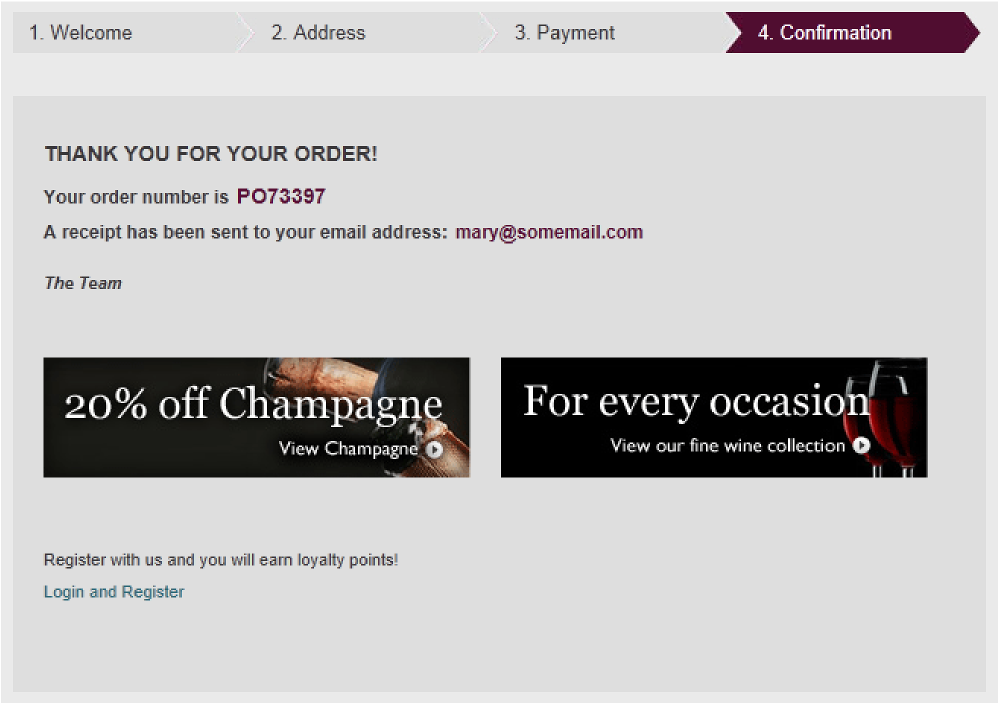
Here the customer enters name, address and contact details, if these are not already registered in the system. If they are, there will be an option to update the existing information. The available shipping options are selected in this step. It is also possible to chose a different billing address.

Step 3: Payment



Here the total order sum is calculated, and the desired payment method is selected. The sample site also has a gift card option where the gift card details are entered and the total sum is recalculated based on this.

Step 4: Confirmation



The final step contains the order confirmation and displays the order number the customer. Also in this step an order confirmation email is sent to the customer.

Properties

The **Check Out** page is created in edit mode and then defined in the *site configuration setting of the start page*. Apart from categories, the page does not have any editable properties.

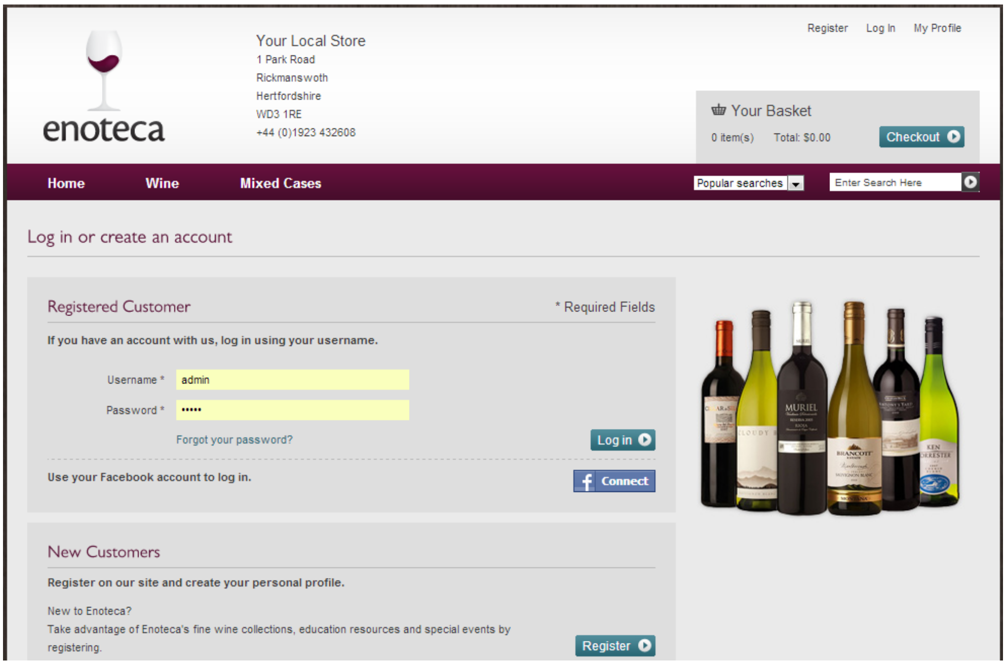
For more information on different payment providers in EPiServer Commerce, please refer to the *Payment Providers section*.

Login

Introduction

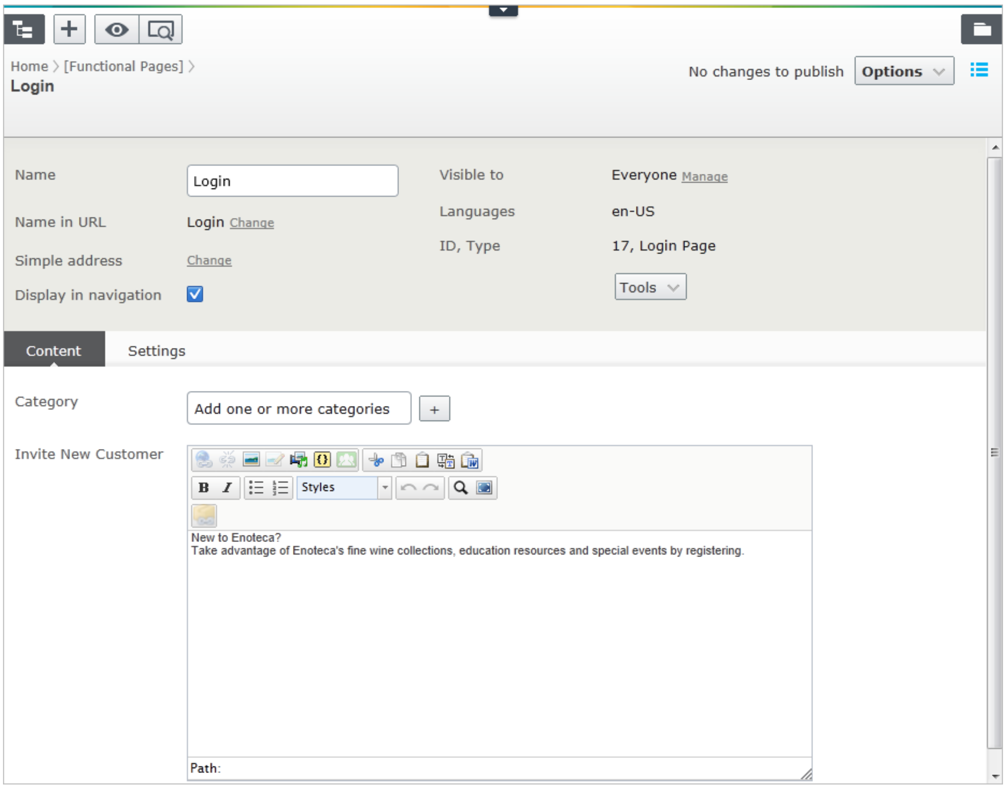
The **Login** page provides a login possibility for both website editors and administrators, as well as registered customers. A user name and password is required. The page has functionality for password recovery. It is also possible to log in to the site using Facebook account credentials.

The Login page is also the entrance for registration of new customers to the site. Clicking on the **Register** option will take the user to the *Create Account* page. To register, a name and email address is needed, together with a user name and a password.



Properties

Most of the functionality of the **Login** page is defined in code. However, in edit mode you will find and editor field where it is possible to design a welcome message to new users registering on the site.



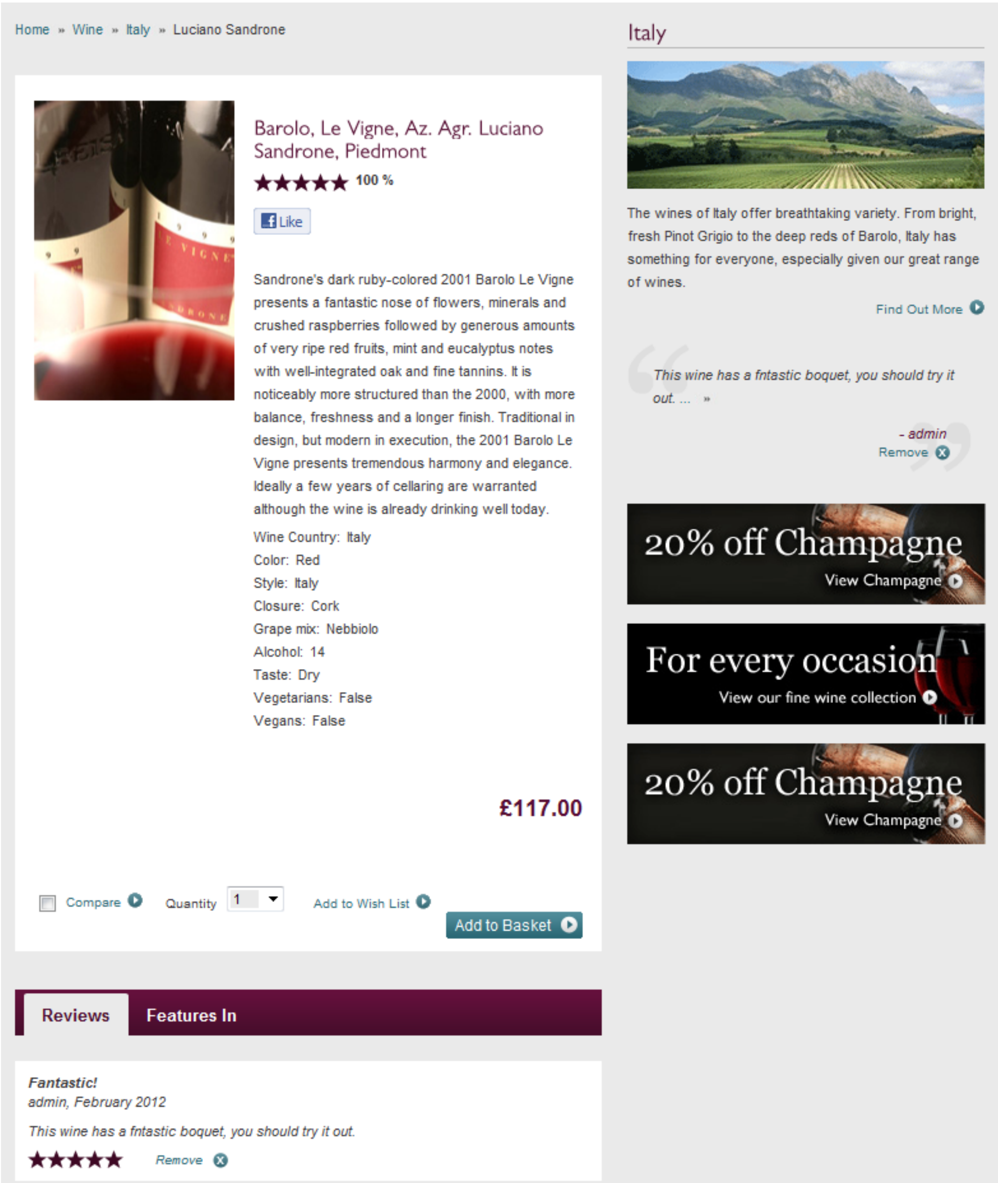
When created, the **Login** page must be defined in the *site configuration setting of the start page*.

Wine Detail

Introduction

The **Wine Detail** page is a "product page", and as such plays a central role on this type of site, since it is used for displaying product details and related information. The page is displayed when a customer selects a specific product, and will display product information from the product catalog of Commerce Manager.

The product information is displayed in the center area, with options for comparing, adding to wish list and buying. Below the product information, any related review or ratings information will be displayed. 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.



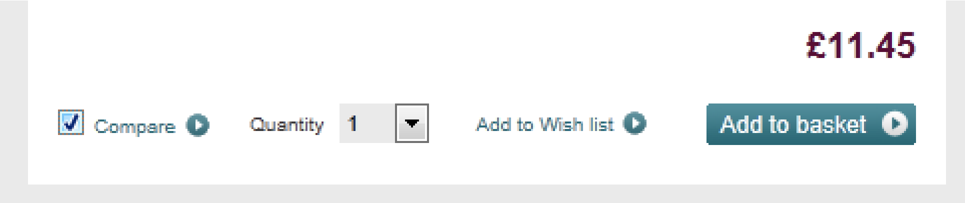
Properties

The Wine Detail 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. Apart from categories, the page does not have any editable properties.

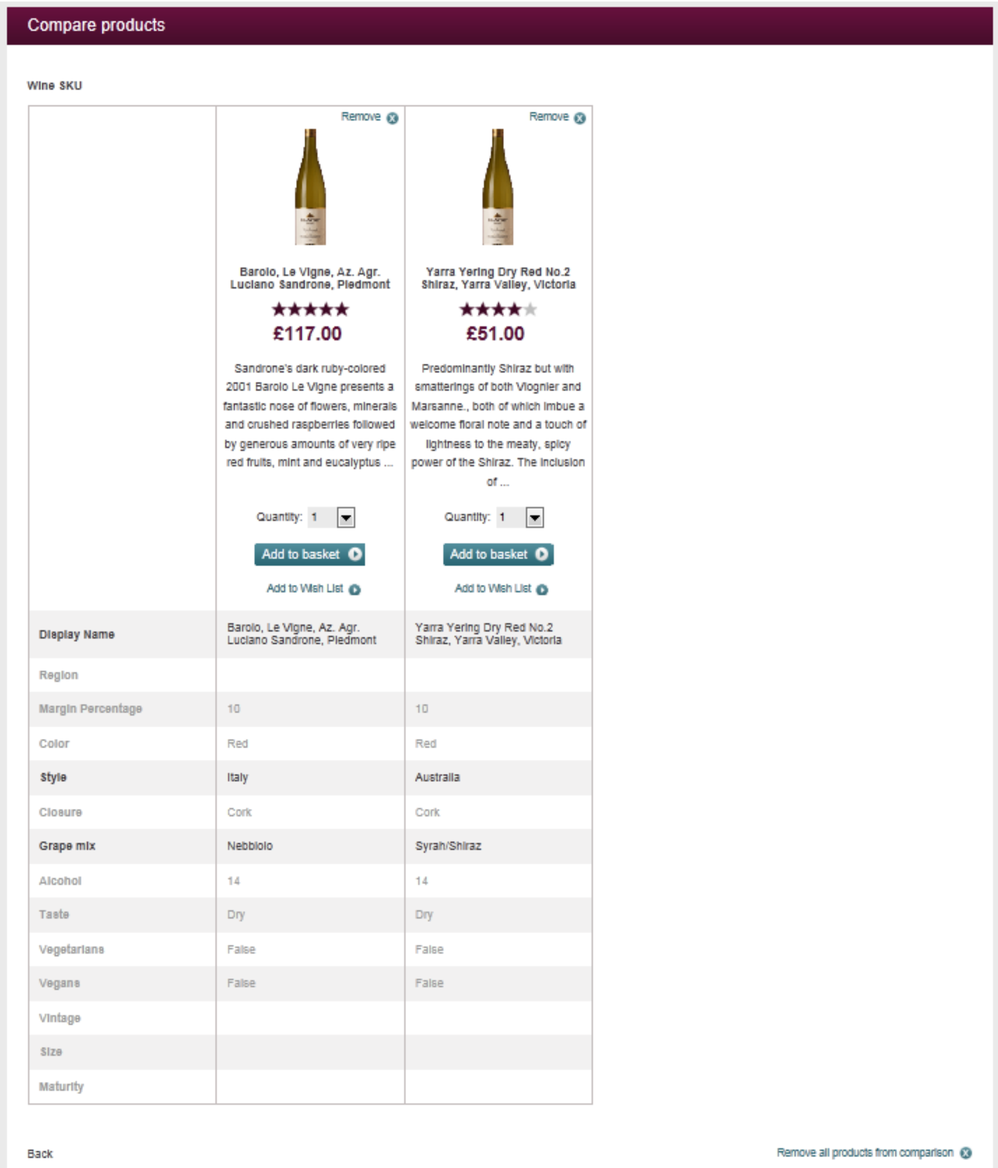
Compare

Introduction

The **Compare** page type holds functionality for displaying selected products for comparison. For each product you want to compare, you can select the **Compare** option, which will add the product to the Compare page. This page can then be accessed by clicking the **Compare** link/button.



The selected products are listed next to each other together with related product features, for easy overview and comparison. You can compare up to four products at the same time. 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 user.



Properties

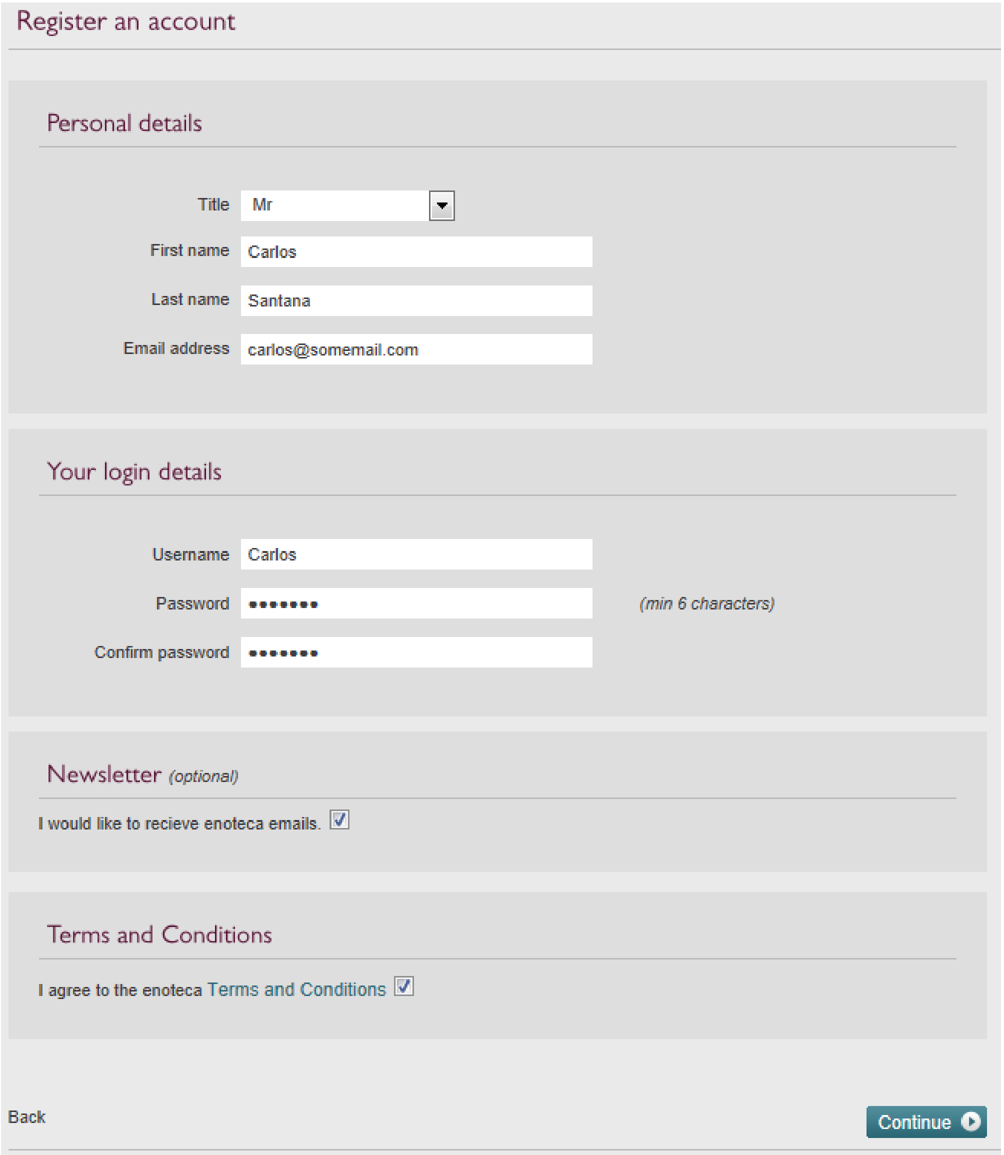
The **(Product) Compare** page holds no information of its own so it has no editor field. When the product compare page has been created, it must be defined in the *site configuration setting of the start page*.

Create Account

Introduction

The **Create Account** 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 there is also an option to sign up for a newsletter.

When the user has agreed to and selected the **Terms and Conditions** option and clicked on **Continue**, a confirmation message will be displayed. The account will be created and the account details are saved in the customer database of Commerce Manager. Later on account details can be updated from the *My Profile* option.



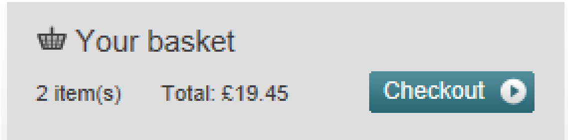
Properties

The **Create Account** page holds no information of its own so it has no editor field. When the page has been created, it must be defined in the *site configuration setting of the start page*.

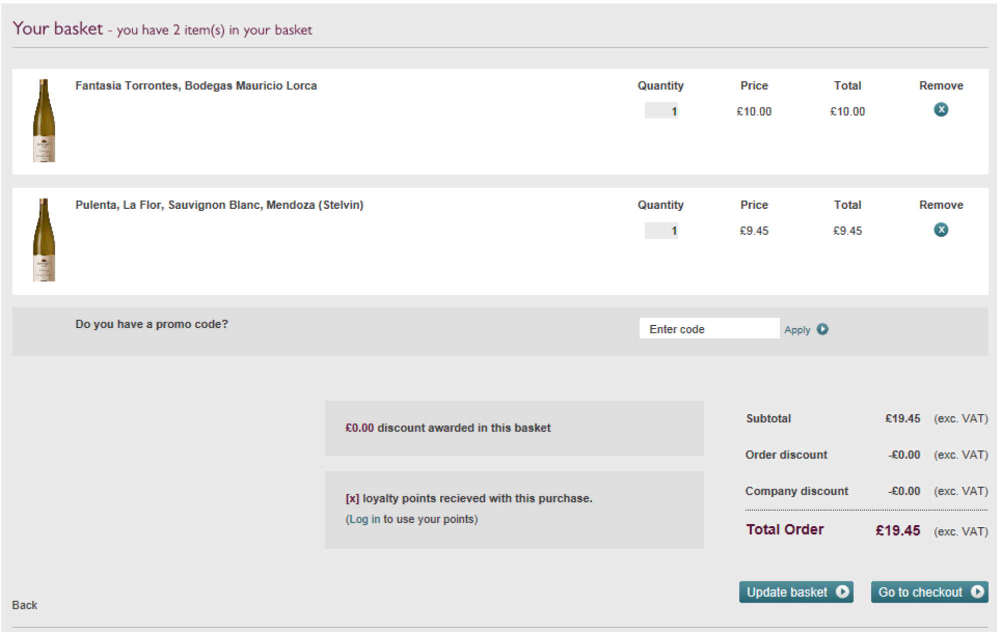
Shopping Basket

Introduction

The purpose of the **Shopping Basket** page type is to display product items that a customer has added to the personal shopping basket. The page can be accessed from several instances, and the **Your basket** view option is always available in the tope menu of the site. The total value is instantly updated when something is added to the basket.



The Shopping Basket page provides functionality for changing the quantity of items as well as removing items from the basket. The **promotion code** option will apply any discount from a selection of related discount options from the system.



> The "Total" value in the shopping basket display does not include promotions.

When the shopping basket information has been changed, clicking **Update basket** will cause the pricing information to be recalculated based on the new information. Information about loyalty points will also be calculated and displayed on the page. Clicking **Go to checkout** takes the customer to the first step of the shopping completion procedure.

Properties

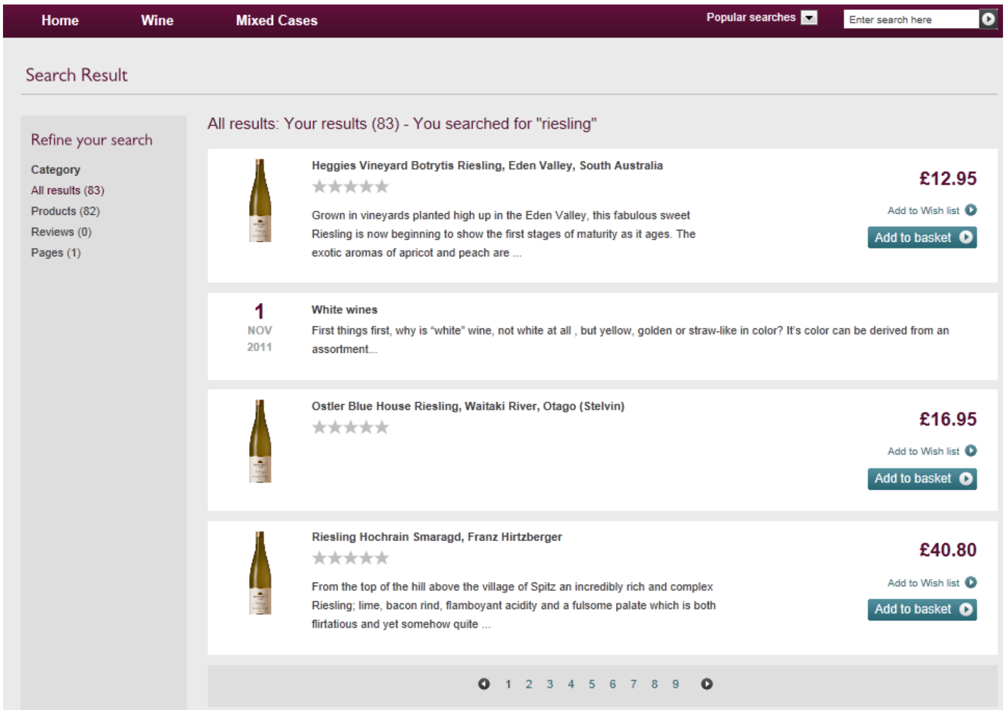
The **Shopping Basket** page holds no information of its own so it has no editor field. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Search Result

Introduction

The **Search Result 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 product details displayed. From here you have the possibility to add items to the shopping basket, or add items to the wish list. Clicking on an item will display the full product information page.

With the **Refine your search** option in the left column, the search results can be filtered based on categories.



Properties

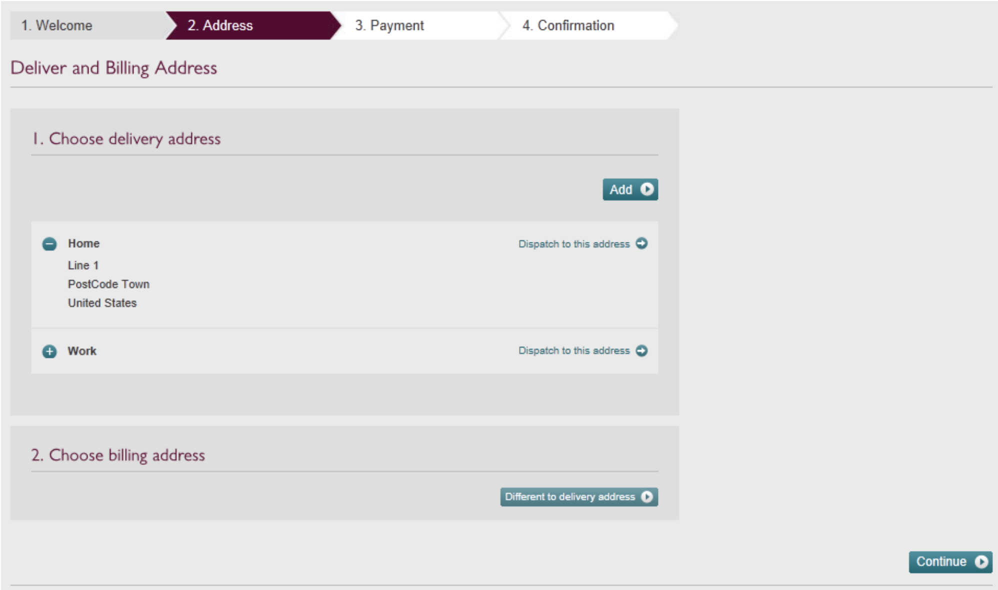
The **Search Result page** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

For more information on how to search in EPiServer Commerce, refer to the *Search* section of this documentation.

Company Checkout

Introduction

The **Company Checkout** page is used in the B2B scenario, and is similar to the B2C *check out page*.



Properties

The **Company Checkout page** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

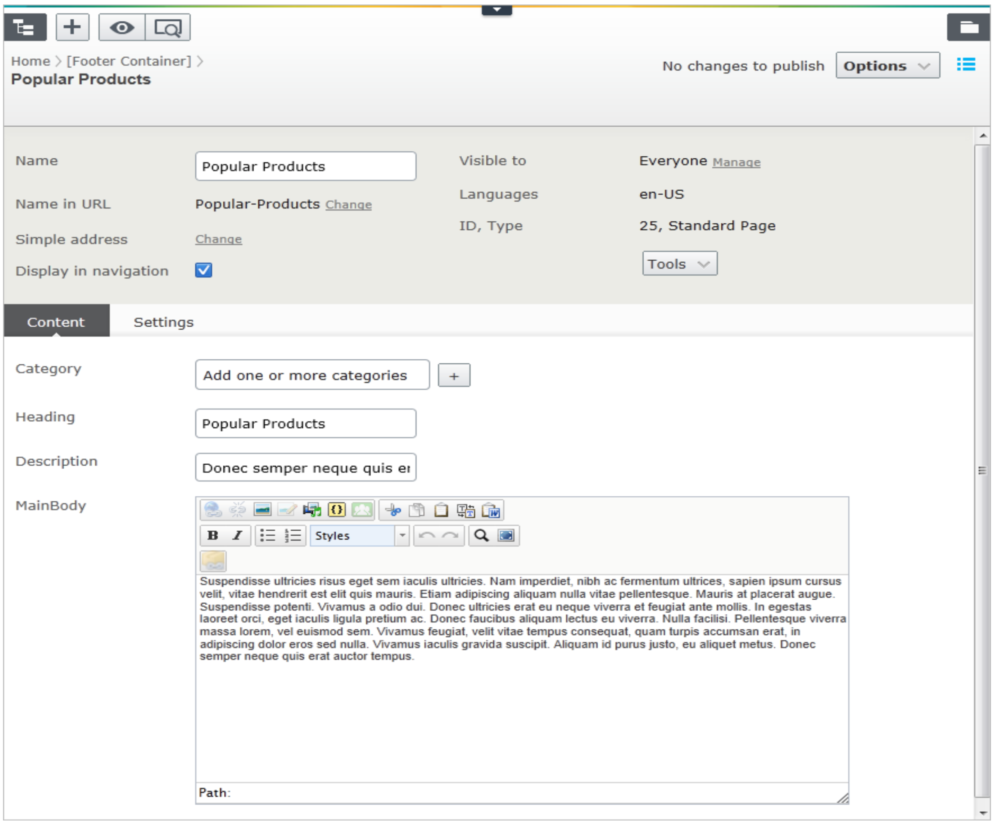
Standard Page

Introduction

The page type **Standard Page** in EPiServer Commerce is used for creating an ordinary information page. On the sample site you will find it for example under the [Content Pages] and [Footer Container] sections of the page tree structure.

Properties

The page type is quite simple and contains a **Heading** and a **Description** field together with an editorial body. The editor toolbar contains the *Product Link tool* for creating links to products.

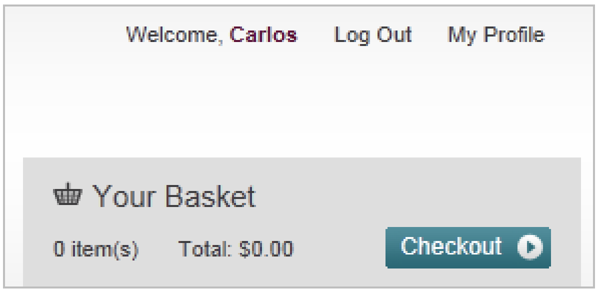


For more information on how to work with the editor field, refer to the user documentation for EPiServer CMS.

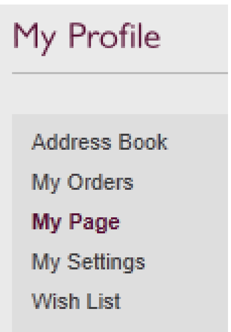
My Profile Pages

Introduction

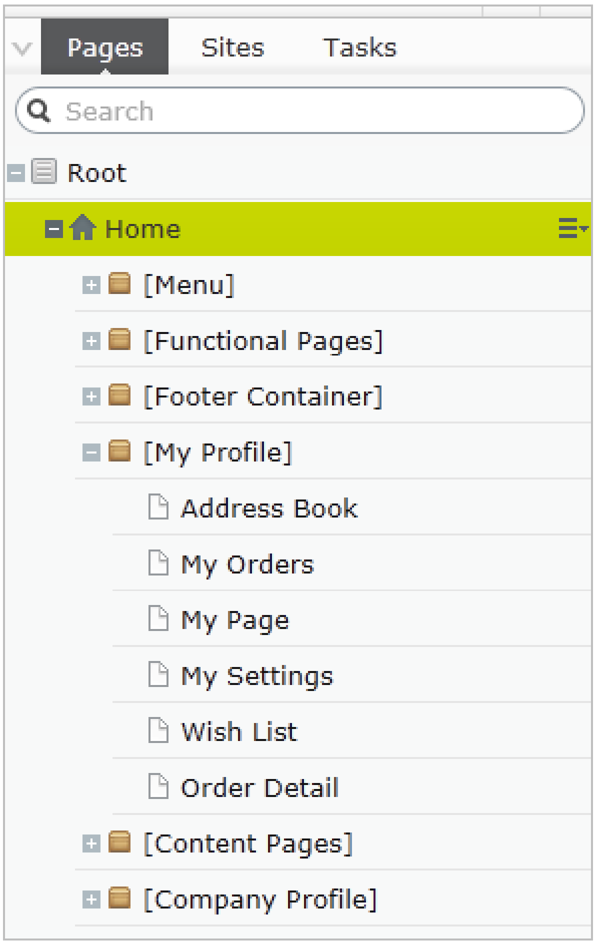
In the sample site, the personal user account related information is available from the **My profile** option at the very top of the page when the user is logged in.



The information is contained in a set of pages organized under the **My Profile** view.



The personal account related pages are stored under the **[My Profile]** container page in the page tree.



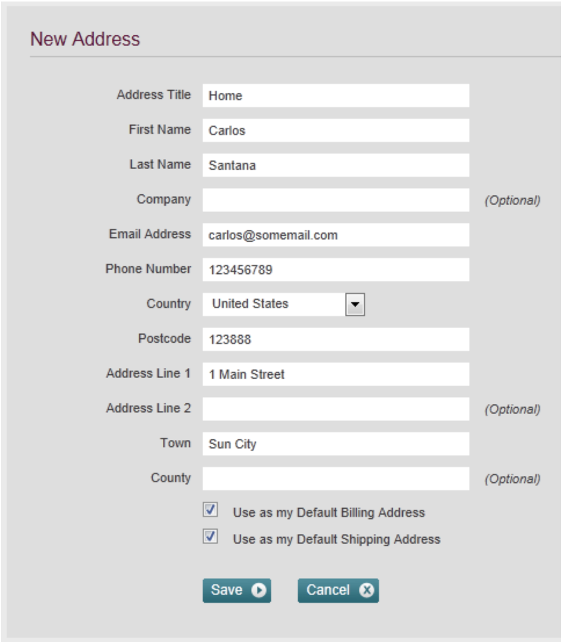
Properties

These 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, all the pages except Address Book must be defined in the *site configuration setting of the start page*.

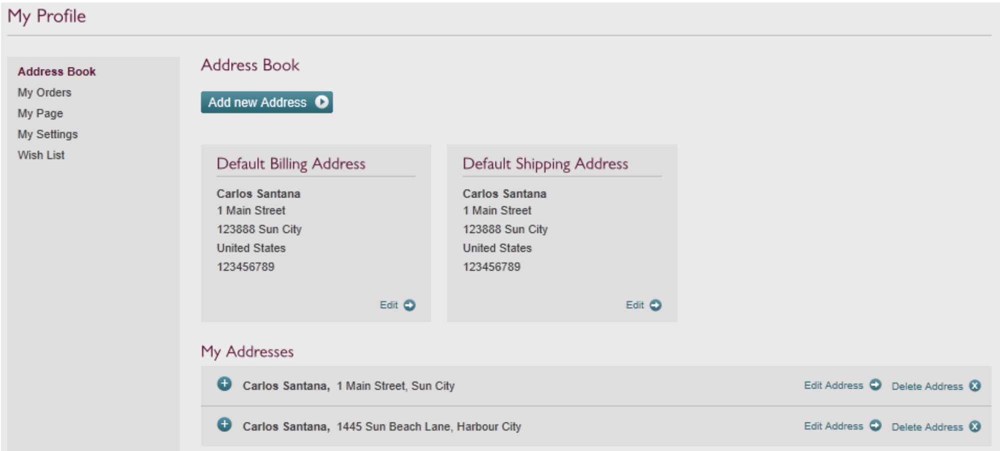
Address Book

Introduction

The **Address Book** page holds functionality for adding, displaying and deleting address information for a user account. Multiple addresses can be added, and different shipping and billing addresses can be used. Specific addresses for billing and shipping can be set as default, and will be used in the checkout process.



The address information is displayed as part of the information under *My Profile* for the user account.



Properties

The **Address Book** page holds no editable information of its own.

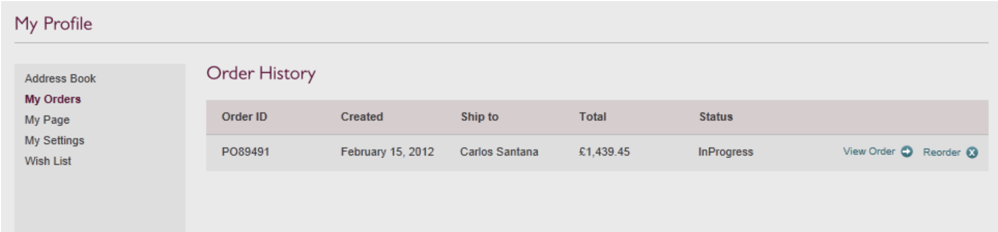
My Orders

Introduction

The purpose of the **My Orders** page is to display the order history for a user account. The order information is collected from the customer management part of Commerce Manager, and is displayed as part of the information under *My Profile* for the user account.

The Order History overview displays the order ID number, creation date, receiver, and total order amount and status.

Clicking **View Order** will display further order details for the selected order. The options here are described in the *Order Detail* section. Clicking **Reorder** in the Order history view will initiate the creation of the exact same order.



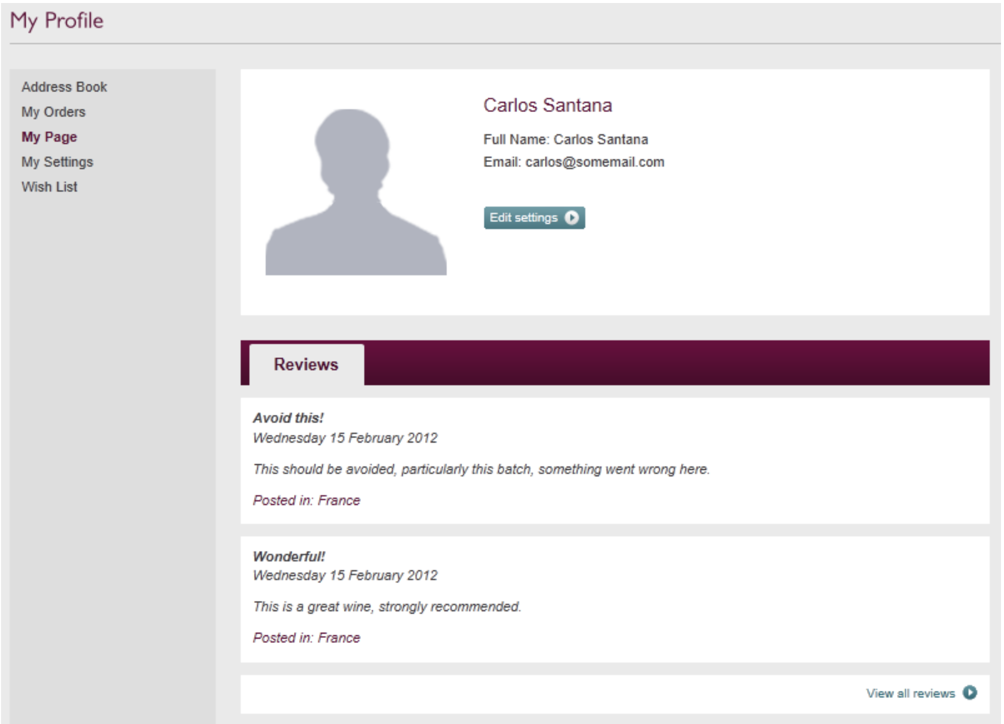
Properties

The **My Orders** page holds no editable information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

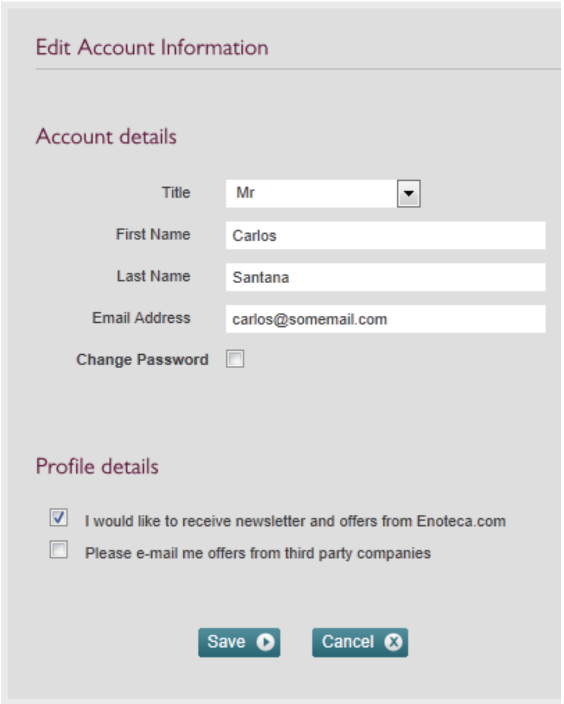
My Page

Introduction

The **My Page** page provides an overview of the personal account information, with user data and product reviews added by tthe user. The My Page information is displayed as part of the information under *My Profile* for the user account.



Clicking **Edit settings** allows for editing of the account information. The settings here are described further in the *My Settings* section of this documentation.



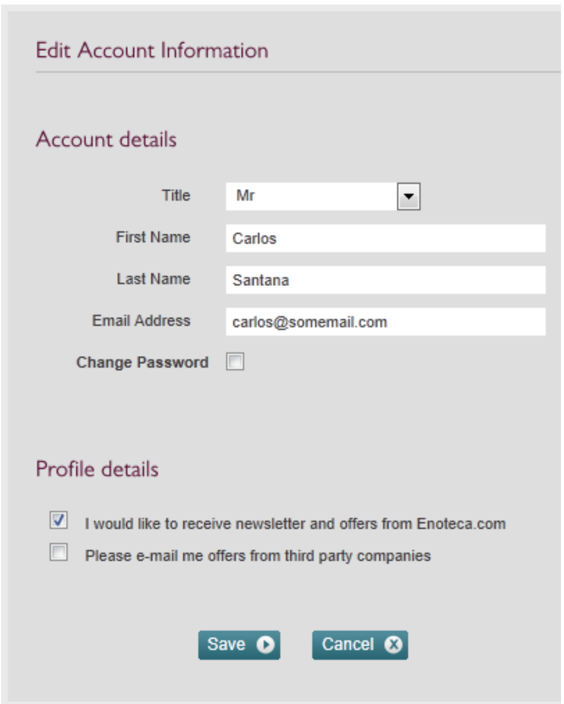
Properties

The **My Page** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

My Settings

Introduction

From the **My Settings** page a customer can update the user name, e-mail address and password for the account. From here it is also possible to sign up for newsletters and third-party information.



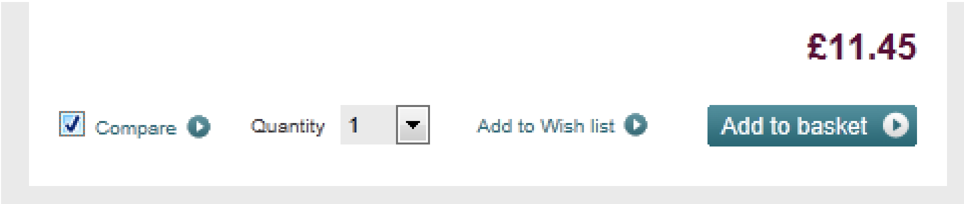
Properties

The **My Settings** page holds no information of its own. After creation the **My Settings** page must be defined in the *site configuration setting of the start page*.

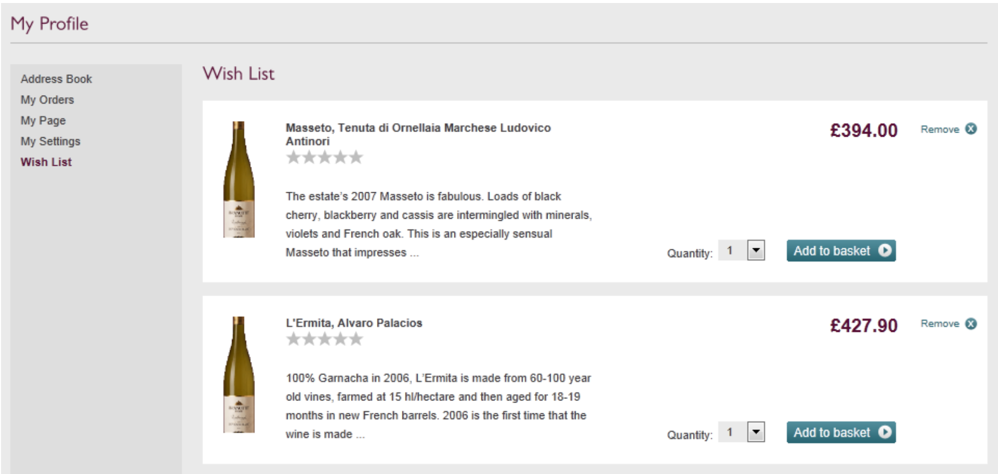
Wish List

Introduction

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 from the *My Profile* option at the very top of the page.



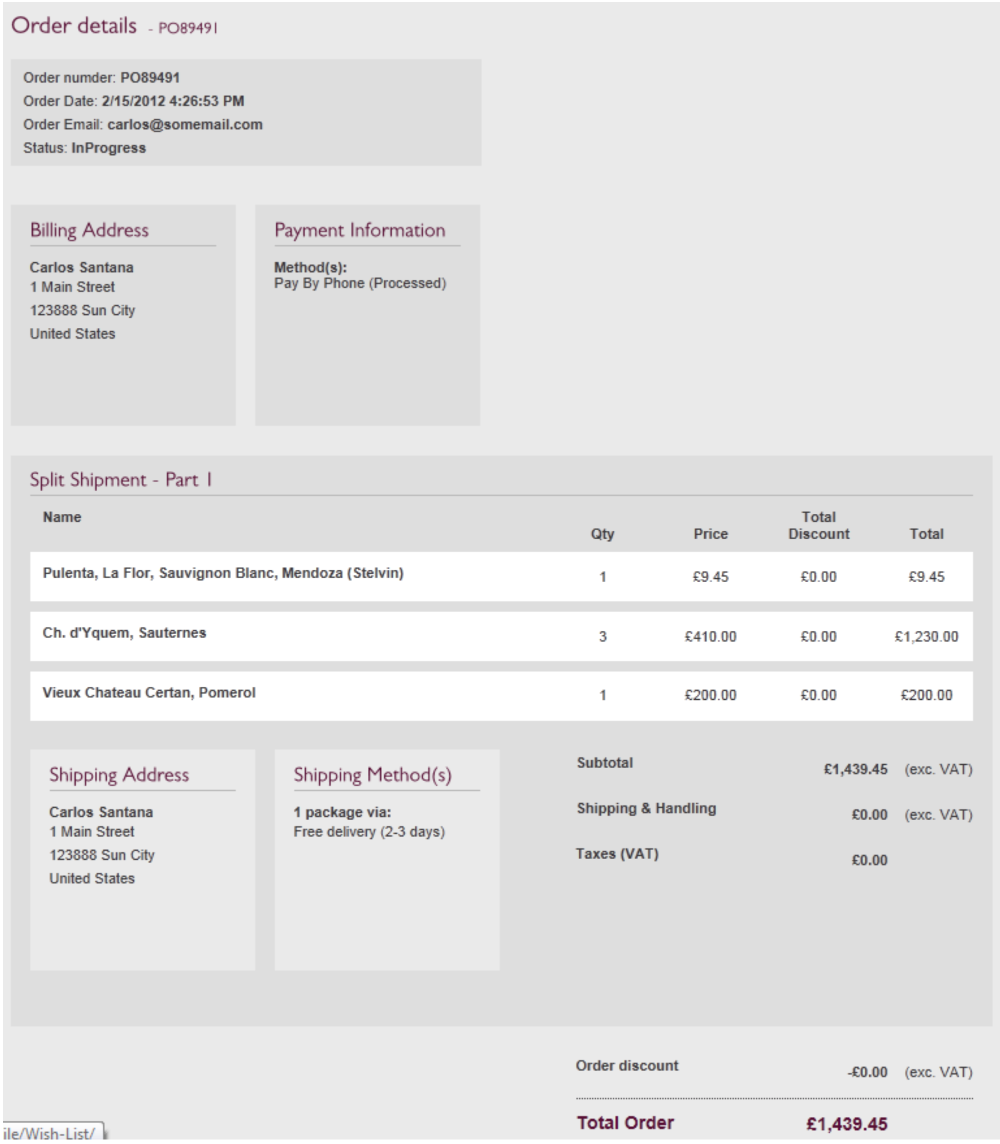
Properties

The **Wish List** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Order Detail

Introduction

The **Order Detail** page displays order details for a selected order. The page is displayed when clicking **View Order** from the order history overview on the **My Orders** page under *My Profile*.



Properties

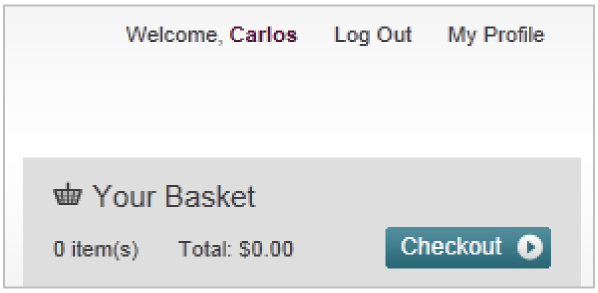
The information displayed includes contact details, address and payment information, shipping address and methods, product quantity and price, as well as the total order sum including taxes and any discounts. All of this is retrieved from Commerce Manager, and can only be viewed.

Company Profile

Introduction

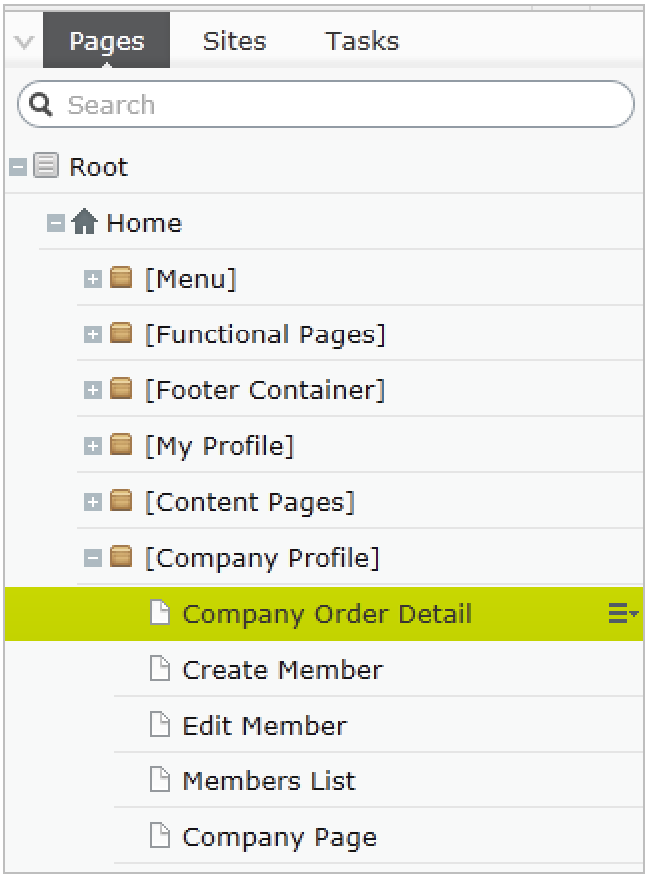
In the B2B scenario of the sample site, the **Company Profile** pages are used for displaying account information for a company with associated users. Through a company account, companies can add their employees as users, and deliveries can be shipped to multiple addresses.

As for users in a B2C scenario, the company account related information is available from the **My profile** option at the very top of the page for the company account **administrator** when this user is logged in.



The company information is displayed using the *Company Page* page type. Refer to the *Managing Company Accounts* section for more information on how to set up company accounts.

The company account related pages are stored under the **[Company Profile]** container page in the page tree.



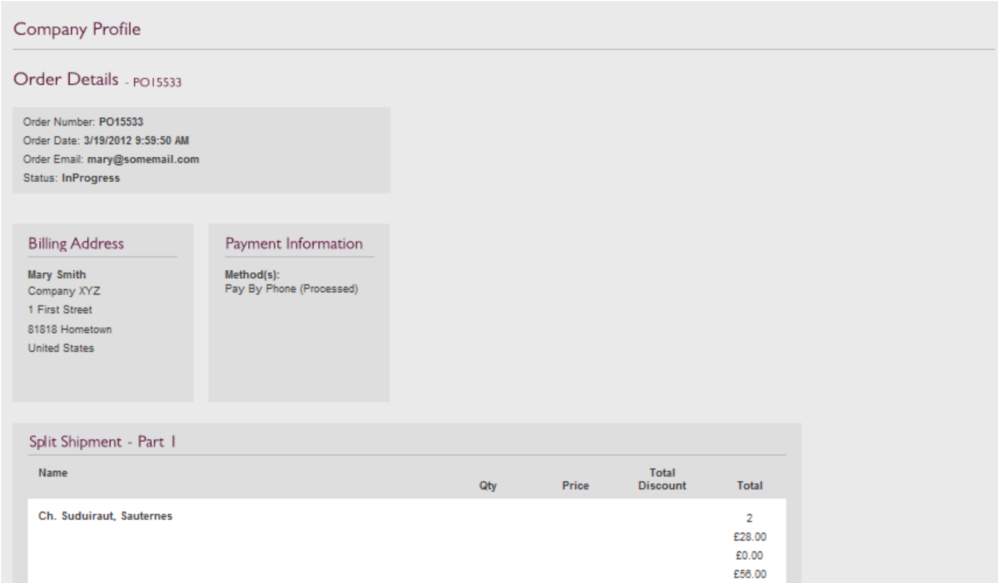
Properties

These pages are based on specific page types with functionality for extracting company account information from the customer management part of Commerce Manager. The page types are only used for display and hold no editorial information of their own. After they have been created, all pages must be defined in the *site configuration setting of the start page.*

Company Order Detail

Introduction

The **Company Order Detail** page displays order details for a selected order. The page is accessed when selecting an order in the **Orders** list of the *Company Profile overview page*.



The information here is read-only, it is not possible to update any order information from here.

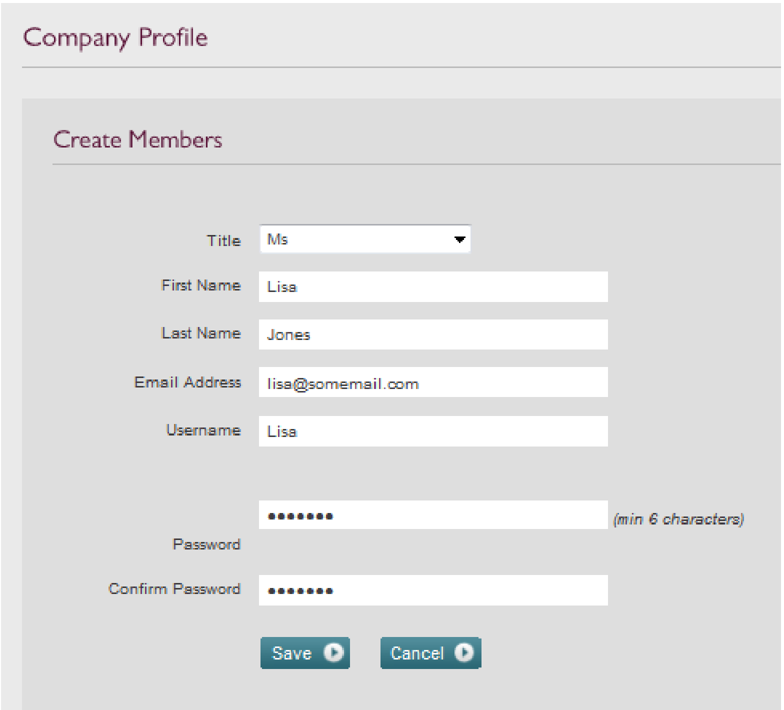
Properties

The **Company Order Detail** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Create Member

Introduction

The **Create Member** page provides a possibility for the company account administrator to **add members** to be associated with the company account. The Create Member page can be accessed by the company account administrator by selecting the **Create a Member** option in the *Members List page*.



Enter information in all fields and click **Save** when done. The member will be added to the company account, and will be able to log in with the credentials provided.

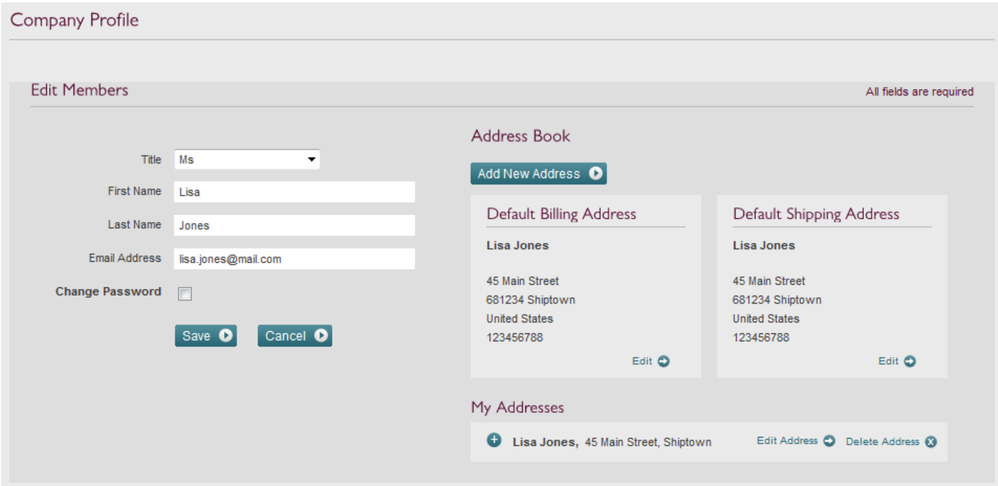
Properties

The **Create Member** page holds no editorial information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Edit Member

Introduction

The **Edit Member** page provides a possibility for the company account administrator to edit the settings for an **individual member** of the company account. The Edit Member page can be accessed by selecting the **Edit** option in the *Members List page*.



The following information can be edited from here:

- **Personal information** for the company account member - name, e-mail address and resetting of the password. Click **Save** to update the changes.
- **Default billing and shipping addresses** used by the account member. Addresses can be edited and deleted, and the same information can also be updated by the individual member from the *User Profile pages*.

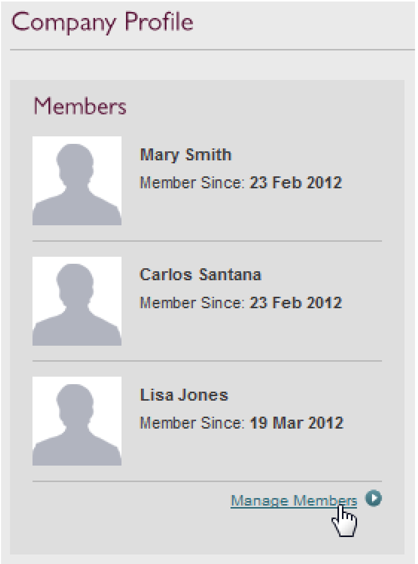
Properties

The **Edit Member** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

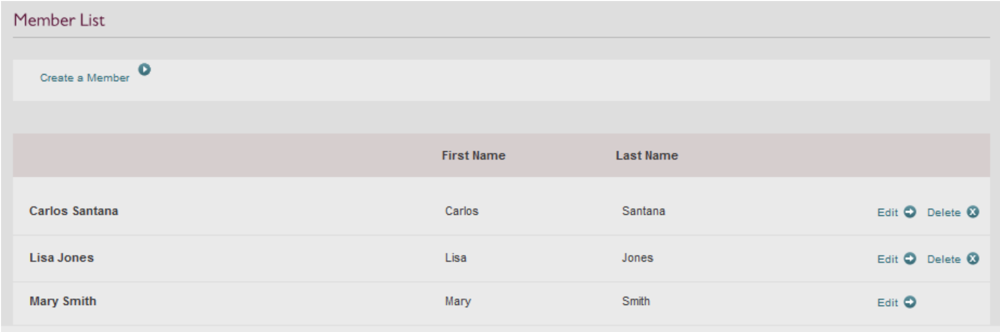
Members List

Introduction

The **Members List** page provides an **overview of members** associated with the company account. The list is displayed when the company account administrator selects the **Manage Members** option in the left column of the *Company Profile overview page*.



From the **Members List**, the company account administrator can *create new members* associated with the account, *edit information for existing members*, and **delete** existing members from the account.



The company account administrator cannot be deleted from here, this information must be changed by an administrator in Commerce Manager.

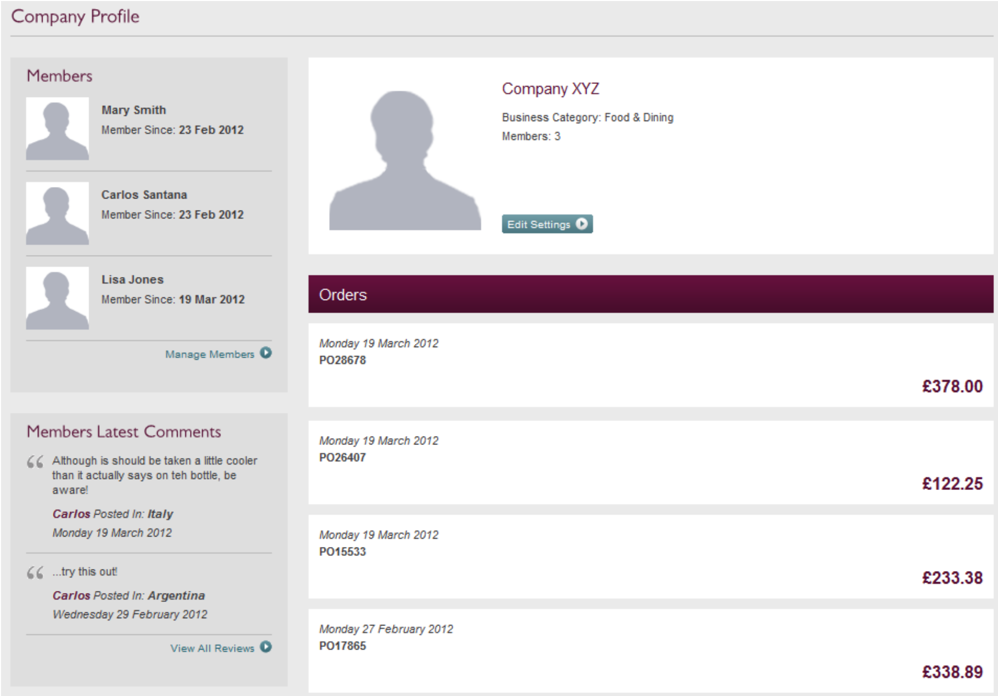
Properties

The **Members List** page holds no editorial information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Company Page

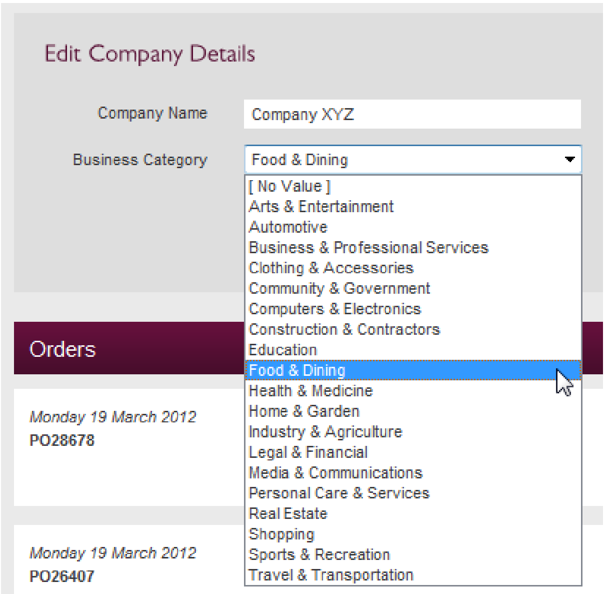
Introduction

The **Company Page** provides an overview of information related to a specific company. The page can be accessed by the company account **administrator** when logging in and selecting the **My Profile** option at the top of the page. If the user is a company account administrator, the Company Page will be displayed by default.



The page is built up of several sections. On the upper left side, a list of all **members** associated with the company account will be displayed. Selecting **Manage Members** here will display the *Member List page*, from where members and member information can be managed. In the lower left part, product **comments** and reviews added by members are listed.

The top main section displays company account information. Here, the **Edit Settings** option provides a possibility for the company account administrator to edit the account settings.



Settings that can be edited are the **Company Name** and the **Business Category** that it belongs to. Select **Save** to save the changes.

The middle part of the page displays a listing of **recent orders** for the company account. The order date, number, and total order sum is shown. Clicking an order number will display further order details using the *Company Order Detail page*.

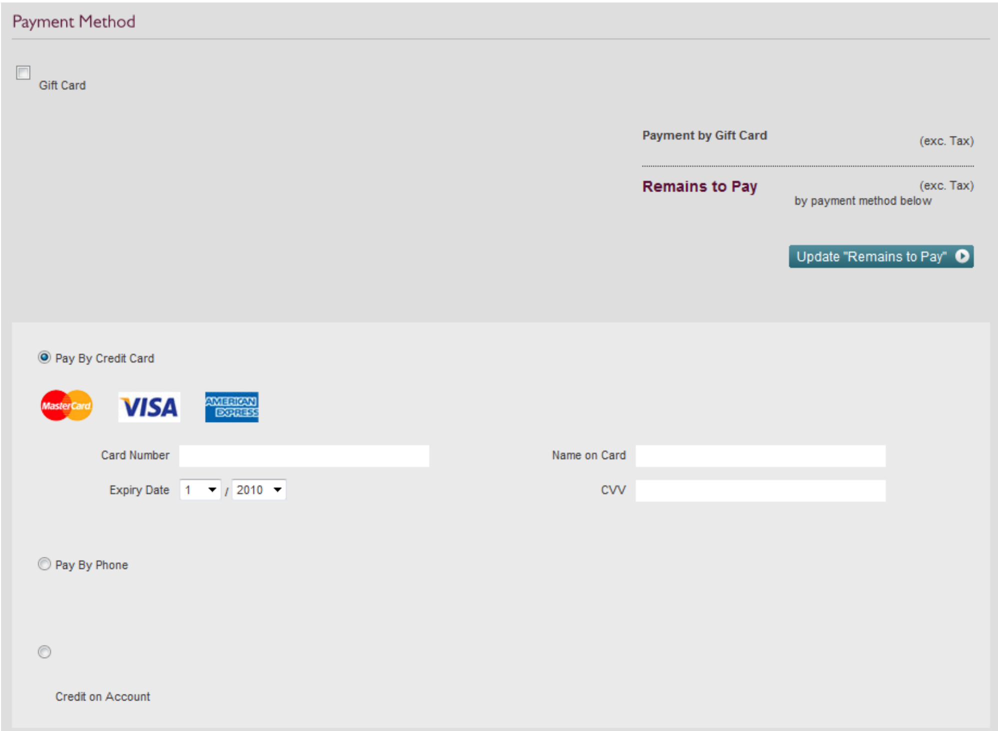
Properties

The **Company Page** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Payment Providers

Introduction

EPiServer Commerce is a flexible platform allowing you to use many of the most popular payment providers within e-commerce. There are a number of payment solutions for different markets available "out-of-the-box" for EPiServer Commerce. Some are installed automatically with the EPiServer Commerce sample site, and some are available as separate modules.



Payment Providers Available with the Sample Site

When you install the EPiServer Commerce sample site, the payment provider options listed below will be included by default:

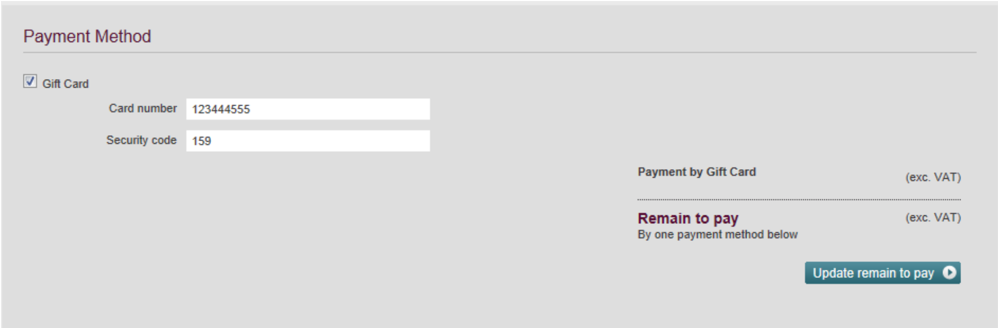
- **Pay with Gift Card**- payment using gift card of certain values and types.
- **Pay by Credit Card** - payment using the most common credit cards.
- **Pay by Phone** - payment method where payment is done by phone.
- **Credit on Account** - credit payment option for a company account.

The following sections of this documentation briefly describes the user functionality for the various payment methods available. Refer to the *EPiServer Commerce SDK* for more information on how to configure and customize the different payment methods.

Gift Card

The **Gift Card** payment provider is available by default in a standard installation of the EPiServer Commerce sample site. This option allows for purchases using gift cards with certain values. When the **Gift**

Card option is checked, the customer can enter the card number and security code for the gift card to be used.



The associated gift card value will be calculated, and when clicking Update remain to pay, the total remaining order sum will be calculated.

Gift cards are defined in Commerce Manager under Customer Management. Refer to the *Gift Card Administration* section for more information. Refer to the EPiServer Commerce developer documentation for more information on how to configure the different payment providers available.

Pay by Credit Card

The **Pay by Credit Card** payment provider is available by default in a standard installation of the EPiServer Commerce sample site.

This widely used payment option is used for managing payments for the major credit card providers. The customer enters credit card details such as card number, expiration date, card name and CVV (Card Verification Value) number. The system verifies the card information, and the payment transaction is carried out.

Refer to the EPiServer Commerce developer documentation for more information on how to configure the different payment providers available.

Pay by Phone

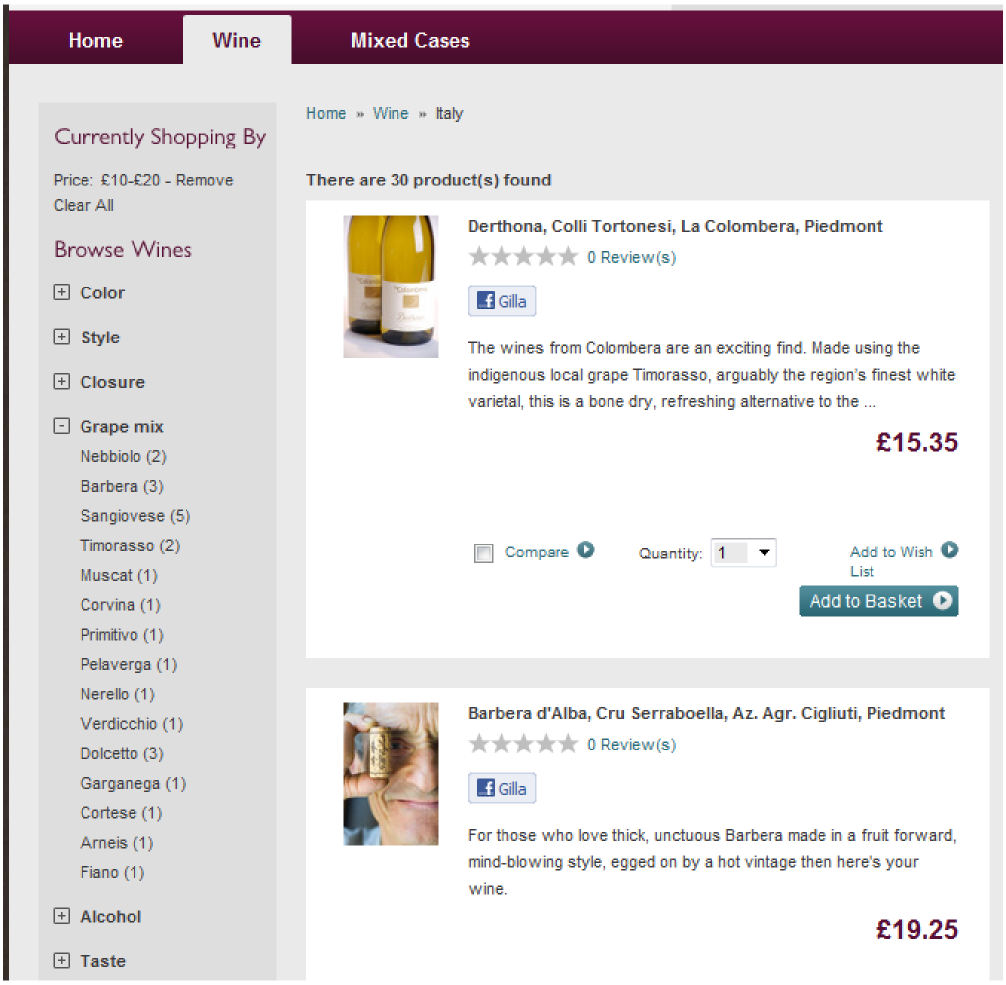
The **Pay by Phone** payment provider is available by default in a standard installation of the EPiServer Commerce sample site. This payment method makes it possible to manage payments over telephone. Refer to the *EPiServer Commerce SDK* for more information on how to configure the different payment providers available.

Credit on Account

The EPiServer Commerce sample site has functionality for adding company accounts in a B2B scenario. The checkout procedure for company accounts includes by default the **Credit on Account** payment method, where businesses can pay using company account credit. Refer to the *EPiServer Commerce SDK* for more information on how to configure the different payment providers available.

Faceted Navigation

Faceted navigation is a feature allowing user to quickly navigate through many kinds of filters in product listing, for instance color, price range or taste. The faceted navigation feature is available on the EPiServer Commerce sample site when selecting "Wine" or "Mixed cases" in the main menu.



The product listing in the main area will be filtered based on the selections done by the user in the left menu. This offers a powerful way of guiding the user to the desired products in the product catalog. The faceted navigation can be easily customized through configuration, refer to the EPiServer Commerce Developer Guide for more information.

Personalization

Introduction

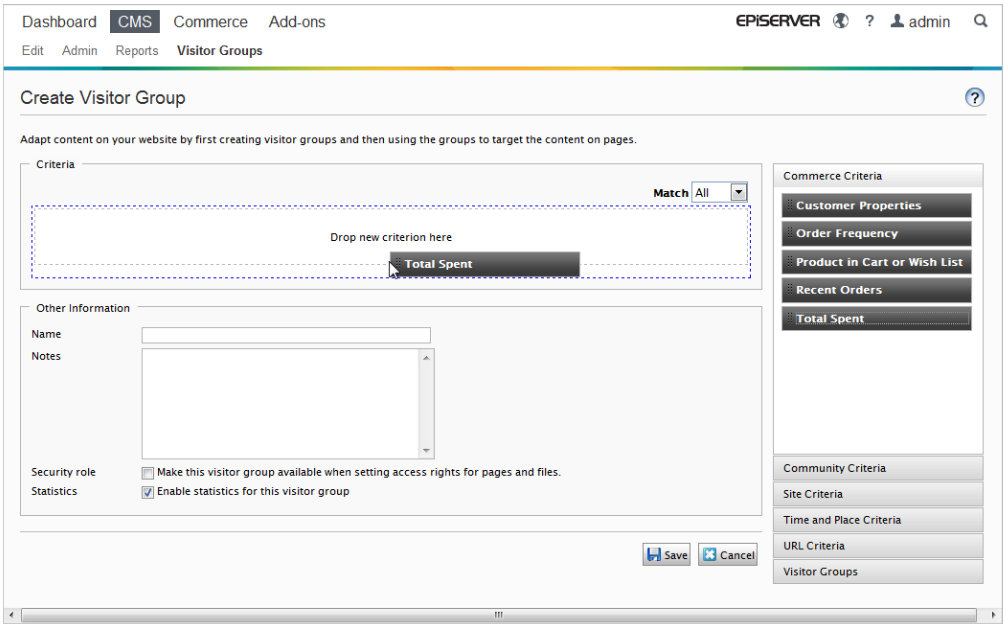
The personalization feature in EPiServer CMS allows you to create adapted content that will be displayed to targeted **Visitor Groups**. Based on user information collected when visitors access your website, different content will be shown to different visitor groups of your choice. You can for instance display different content to first time visitors and returning visitors on your website. The personalization feature is described in detail in the *user documentation for EPiServer CMS*.

Personalization Criteria for EPiServer Commerce

The EPiServer Commerce sample site features a number of predefined visitor group criteria customized for an e-commerce site where you want to adapt content based on products and order information. Visitor groups can be applied to the various content on your EPiServer Commerce site, thus creating a personalized website visitor experience.

The visitor groups and their associated personalization criteria can be accessed by clicking **CMS** in the global menu, and then selecting **Visitor Groups** in the submenu displayed. Or, you can right-click in View mode and select **Visitor Groups** in the EPiServer CMS right-click menu.

The personalization criteria for EPiServer Commerce are available under **Commerce Criteria** when you click **Add** to define visitor groups for your site. The various criteria can then be dropped into the configuration area.



The predefined **personalization criteria** for **EPiServer Commerce** are described in more detail in the following.

Customer Properties Criteria

With the **Customer Properties** criteria you can personalize content based on for instance age and geographic location.

Personalize content based on the following information (select from drop-down list):

- **Date of Birth** - define an age range by entering a from/to date. Select a date in the calendar or enter a date directly in the field (default format mm/dd/yyyy).
- **Customer group** - select one of the existing groups Customer, Partner or Distributor.
- **Registration source** - enter the source of registration in free text format.
- **Country** - select a country from the list.
- **Region code** - select a region code based on the address region in addresses.
- **Address postal code** - based on state selected, select a postal code from the list.
- **State** - select a state from the list.

Only one property type with a related value can be selected for a criterion, but several Customer Properties criteria can be defined for a Visitor Group.

Order Frequency Criteria

With the **Recent Orders** criteria you can identify customers that have placed an order in the store" X" times in the last "Y" days.

Personalize content based on the following information:

- **Order times** - select the number of times an order has been placed.
- **Number of days** - select the number of days.

Product in Cart or Wish List Criteria

With the **Products in Cart or Wish List** criteria you can identify shoppers that have placed a product of a certain type or brand in their cart or on their wish list.

Personalize content based on the following information:

- **Specified product code** - enter the desired product code in free text format.
- **Product from a specified category** - select the desired product category from the list.
- **Product has a specified property and value** - enter the desired product property and value, for instance "brand" and "Sony".

Only one property type with a related value can be selected for a criterion. However, you can add several criteria of the type "Products in Cart or Wish List" to a Visitor group.

Recent Orders Criteria

With the **Recent Orders** criteria you can personalize content for visitors that have placed an order on the site in the last "X" days.

Personalize content based on the following information:

- **Number of days** - select the number of days.

Total Spent Criteria

With the **Total Spent** criteria you can personalize content for visitors that have spent "X" amount of money (in a specified currency) on the site in the last "Y" days.

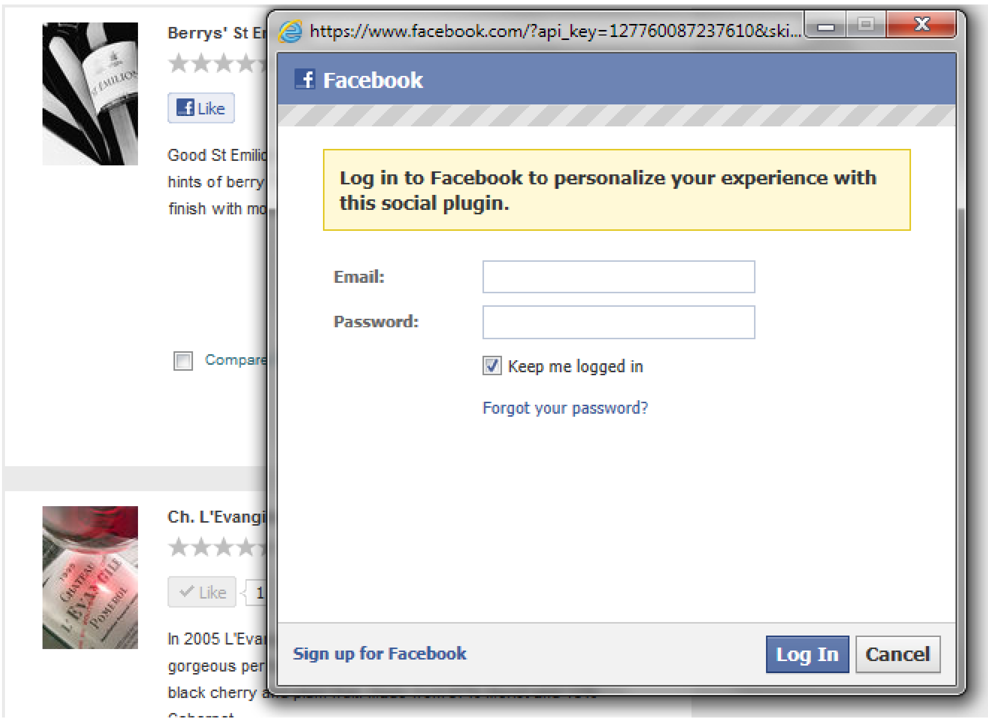
Personalize content based on the following information:

- **Spent at least** - select amount and currency.
- Select **number of days**.

Social Features

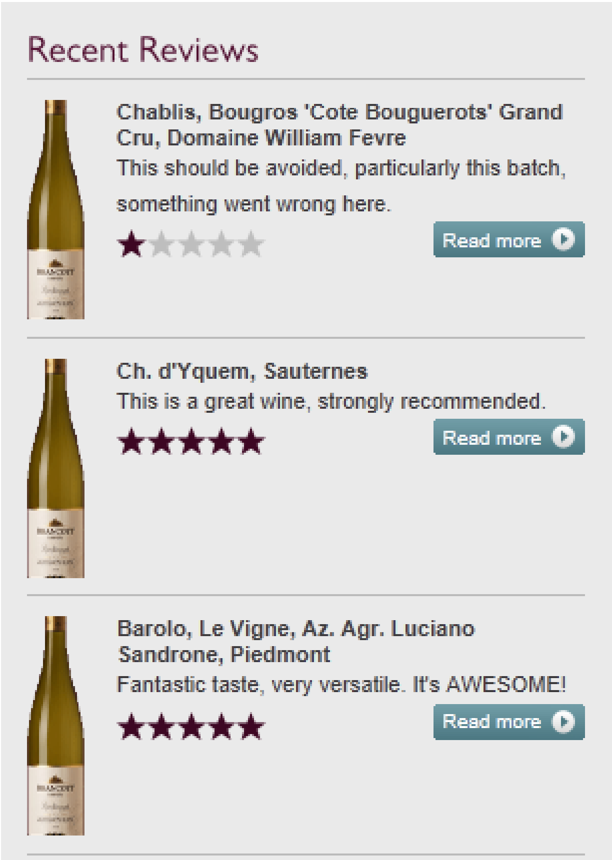
Facebook Integration

The EPiServer Commerce sample site has a built-in Facebook integration, allowing users to share "likings" of any product in the product catalog. This is a powerful way to promote the marketing of products in one of the largest social community networks.



Reviewing and Commenting

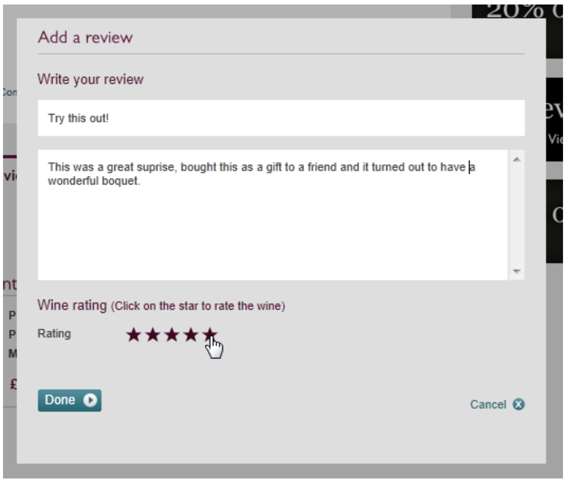
Customers that are logged on to the EPiServer Commerce sample site have the possibility to add **product reviews** by providing comments and rate the products. The resulting reviews are displayed for instance in the right-hand section of the page, as well as for each product.



The reviews will be displayed to all visitors to the site regardless of whether they are logged on or not. Only the three latest reviews will be displayed at the same time, with the possibility to see all reviews if desired.

Adding Comments

When selecting a product, there will be an **Add a review** option available where a comment can be added as well as a rating (1-5). A user can rate a product, but only once. The average score of the ratings will be displayed as the rating for that product.



Logged on users can remove **their own comments** using the **Remove** option.

Approving comments

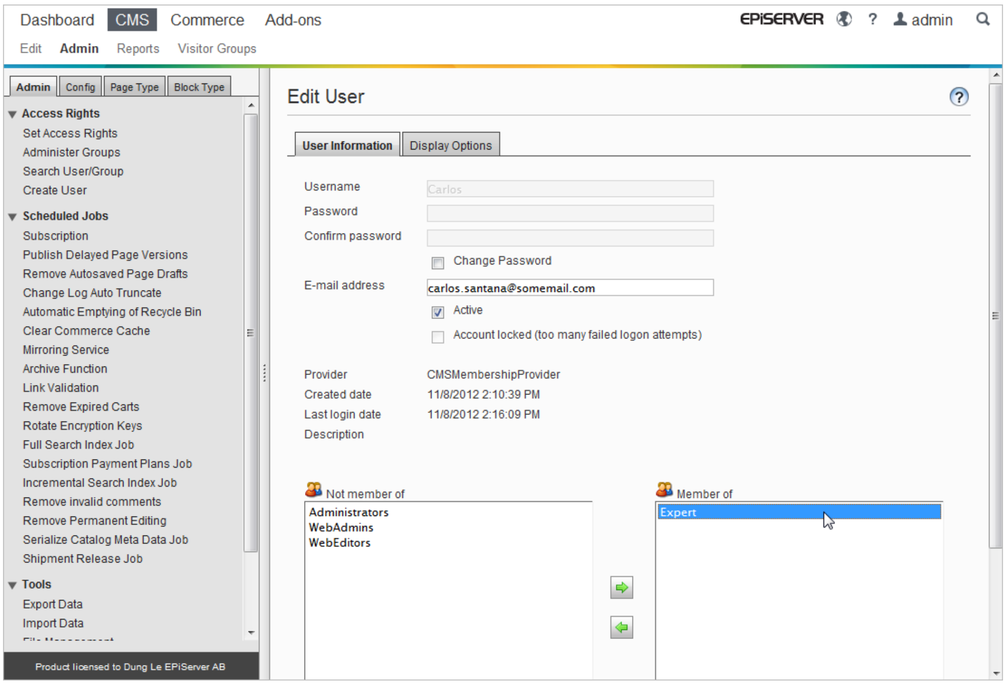
The sample site is configured so that comments added will receive status "pending" and must be approved by the site administrator before they are made visible to others on the site. The approval is done from the dashboard using the *Approval Gadget*. Commerce Manager administrators can see the status for each comment, and remove all comments, from the display for each product.

Abuse reporting of comments

When logged on to the website, you can abuse report comments that others have posted for a product. This is done using the Report as Inappropriate option on the review section for a product. Site administrators can then monitor inappropriate content using the *Abuse Gadget* on the dashboard. When a comment is reported as inappropriate, it will generate an item in the list of abuse reports for the site administrator to manage.

Experts

The EPiServer Commerce sample site includes functionality for **assigning experts** to be involved in rating and reviewing of products. An expert is someone with thorough product knowledge and trusted by the community. From the Admin mode in EPiServer CMS, website administrators can assign the "Expert" role to registered users on the site. Expert's reviews will be highlighted and will appear in the top of review list.



Gadgets

A **gadget** is a small application available from the **Dashboard** in EPiServer OnlineCenter and the Assets Pane and Navigation Pane in EPiServer CMS. A number of gadgets are shipped out-of-the-box with each EPiServer product, see the product-specific user documentation.

You can use some of the gadgets with other devices, such as iPhone and iPad.

You can also develop and customize your own gadgets to suit your needs, see *EPiServer Framework SDK*.

Gadgets that are specific for EPiServer Commerce are described in the following.

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.

When the Commerce Orders gadget has been added to your dashboard, you will be able to easily monitor sales activities for your EPiServer Commerce website.

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.

When the Commerce Overview gadget has been added to your dashboard, you will be able to easily monitor sales data from your EPiServer Commerce website.

Comment Approval Gadget

Users logged on to the sample site can add **comments (reviews)** to products on the site. The **Comment Approval** gadget makes it possible for EPiServer Commerce administrators and editors to manage comments that are left by website visitors. This gadget provides an overview of the commenting status, and you can view, approve or delete comments from here.

Do the following to add and configure the Comment Approval 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 **Comment Approval** gadget by clicking on it in the list. The gadget will be displayed on the dashboard.
4. By selecting **Edit** in the drop-down menu of the gadget, you can set the number of approval items to display, as well as the length of the description.
5. Click **OK** to save you changes. The gadget will be displayed on your dashboard.

Do the following to use the Comment Approval gadget:

1. Log on to EPiServer Commerce and select **Dashboard** in the right-click menu and select the Dashboard tab under which the **Approval** gadget is located.
2. You can chose to view all comments, or filter them according to their status - **Approved**, **Pending** or **Deleted**. Click **Refresh** to update the list if needed.
3. Select one or more comments for which you want to update the status, by clicking the checkbox to the left of each comment. Click the top left checkbox to select all comments displayed in the list.
4. Select the status you want to apply - **Approve**, **Mark Pending** or **Delete**. For instance, select **Approve** to approve the selected comments.

Comment Abuse Report Gadget

The **Comment Abuse Report** gadget makes it possible for EPiServer Commerce administrators and editors to manage comment abuse reports that have been created by website visitors. This gadget provides an overview of abuse reports, and you can remove selected comments from here.

Do the following to add and configure the Comment Abuse Report 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 **Comment Abuse Report** gadget by clicking on it in the list. The gadget will be displayed on the dashboard.
4. By selecting **Edit** in the drop-down menu of the gadget, you can set the number of items to display, as well as the number of abuse reports to be displayed for each comment.
5. Click **OK** to save you changes. The gadget will be displayed on your dashboard.

Do the following to use the Comment Abuse Report gadget:

1. Log on to EPiServer Commerce and select **Dashboard** in the right-click menu and select the Dashboard tab under which the **Comment Abuse Report** gadget is located.
2. Select the comments you want to manage by clicking the checkbox to the left of each comment. Click the top left checkbox to select all comments displayed in the list.
3. Click **Remove Comment** to remove the comment. Select **Ignore** to leave the comment without any actions.

Commerce Settings for CMO Gadget

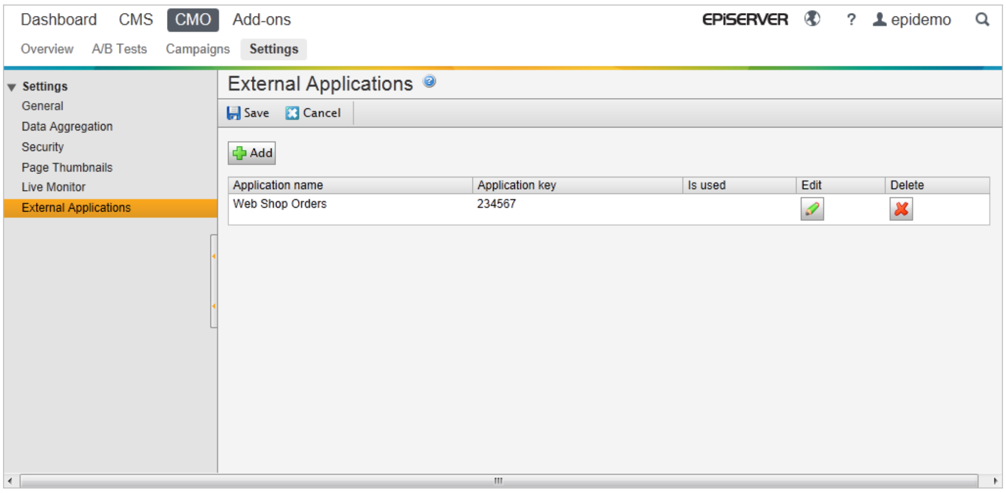
Introduction

With **EPiServer Campaign Monitor and Optimization (CMO)** you can measure and monitor campaigns on your website and optimize your landing pages. EPiServer CMO provides a simple way to analyze campaigns and landing pages, rather than whole sites. Find out more about EPiServer CMO in the user documentation on world.episerver.com.

EPiServer CMO can also be used for monitoring activities on an EPiServer Commerce site. You can for instance monitor the number of views or orders for a specific product or product category. The logging of Commerce KPI data is supported using the **Generic KPI** function in CMO. The number of orders is an example of a generic KPI. This allows for external applications such as Commerce to send notifications using a specific application key. The application names and keys are defined in EPiServer CMO, which will then listen for incoming notifications with these specific key values, and collect and store the data.

The following procedure applies when setting up the integration between CMO and Commerce:

- Set up the web services to be used by EPiServer CMO and the corresponding URL to be used.
- Define the external applications, their application names and keys, in EPiServer CMO.
- Define the product views and/or product orders you want to monitor, using the EPiServer Commerce Settings for CMO gadget. Here you will need the application keys and the URL for the CMO Web Services.
- In EPiServer CMO, create a campaign and add the generic KPI for EPiServer Commerce.
- EPiServer Commerce will update the KPI value using web services.
- The monitoring result will be displayed on the campaign report page in CMO, or by using the **CMO KPI Summary** gadget for EPiServer Commerce on the site that has the EPiServer CMO service installed.



The collected data for EPiServer Commerce is defined in the EPiServer OnlineCenter using the **Commerce settings for CMO gadget**, as described in the following.

To use this gadget you need to have both EPiServer CMO and EPiServer Commerce installed on your website.

Adding the Commerce Settings for CMO Gadget

When you add and configure this gadget, you can choose to monitor activities for a selection of product(s) or order(s).

Do the following to add and configure the CMO gadget forEPiServer Commerce:

1. Open the EPiServer OnlineCenter for your website(s) and select **Add Gadgets**.
2. Click on the **Commerce setting for CMO** gadget to add it to your dashboard.
3. Click **Add** to define the monitoring parameters.
4. Select **Type**, choose either **Product View** or **Product Order**. The Product View will define views of a product or all products under a specific category (node). The Product Order will define orders for one selected product or all orders of products under a specific category (node).
5. In the **Product/Category** field, choose a product or a category by selecting an option in the tree structure on the left hand, and click **Search** in the area to the right. Select a product in the search list and click **Select**. Or, you can select an entire category (node). You can also search directly for a product name or ID. Click **Select** to add your selection.
6. In the **Application Key** field, enter the application ID (defined in EPiServer CMO).
7. In the **URL for CMO Web Service** field, enter the URL to be used by CMO for the web service (defined in EPiServer CMO).

Editing Commerce Settings for the CMO Gadget

Do the following to edit a set of settings for the CMO Gadget:

1. Open the EPiServer OnlineCenter Dashboard, and navigate to the **Commerce settings for CMO** gadget.
2. Click the **Edit** icon for the settings you want to edit.
3. Update the settings information, please refer to the section about adding the Commerce settings for CMO gadget.
4. Click **OK** to save your changes.

Deleting Commerce Settings for the CMO Gadget

Do the following to delete the settings for the CMO Gadget:

1. Open the EPiServer OnlineCenter Dashboard, and navigate to the **Commerce settings for CMO** gadget.
2. In the check box to the left, select the set of settings you want to delete.
3. Click the **Delete** button and click **OK** to confirm.

Tools and Plug-ins

In this section we describe a number of tools and plug-ins for EPiServer Commerce. These are for example a plug-in for the EPiServer CMS editor making it possible to select product details directly from the product catalog. The plug-ins described here are all included by default in the EPiServer Commerce sample site.

Product Link Tool

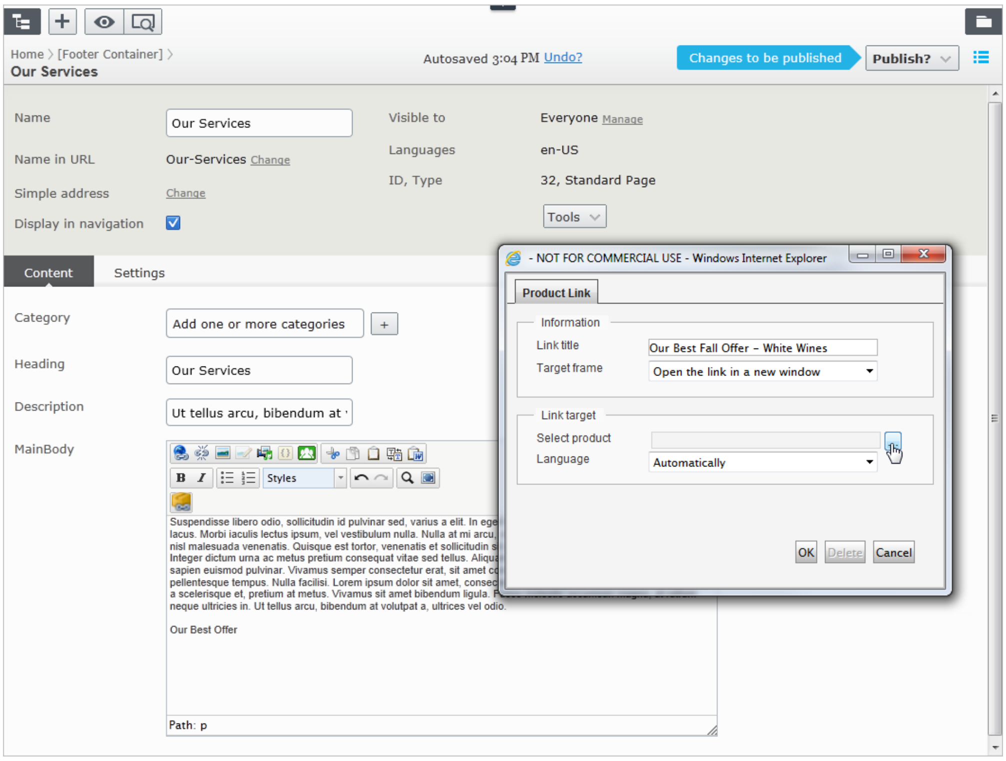
Introduction

The **Product Link Tool** is a plug-in to the EPiServer TinyMCE editor. The tool adds a new function to the toolbar allowing an editor to link content to products in the product catalog in Commerce Manager. When the link is clicked on, the visitor will be transferred to the product page "view mode" for that product.

Adding a Product Link

You can add product links to text, files or images in an EPiServer CMS page or a block.

1. In the editor, select the text, files or images where you want to add a link to a product page in the product catalog.
2. Select the **Insert/edit Product Link** tool in the toolbar of the editor.
3. When clicking the button in the **Select Product** field, the product picker dialog will open. When you expand the catalog tree on the left, related products will be displayed. You can browse the structure and select products. The product display can be sorted by clicking on product **ID** or **Name**. You can also search for a product by entering free text or product ID. Select a product in the list and click **Select**.
4. In the **Language** field you can choose to select the desired language version for the product page, or let the system decide by selecting **Automatically**.
5. Enter the details for the link such as title and target frame, just as you would for any link in EPiServer CMS. Click **OK**.
6. The product link will be displayed in the editor.



EPiServer Commerce supports permanent links, meaning that when a product is renamed the URL will be remembered and will not be broken.

Editing a Product Link

1. Select the link and choose the **Insert/edit Product Link** tool in the toolbar. This will open the **Product Link** dialog.
2. Edit the link options as desired and click **OK** to save your changes.

Removing a Product Link

Select the link and click the **Unlink** tool in the editor toolbar. This will remove the link from the selected text.

The tool buttons in the editor toolbar can be customized, for instance you can change the grouping and orders of the buttons. This is done from the EPiServer CMS administration interface and is described in the *Configuring the HTML Editor section of the EPiServer CMS user documentation*.

Product Dynamic Content

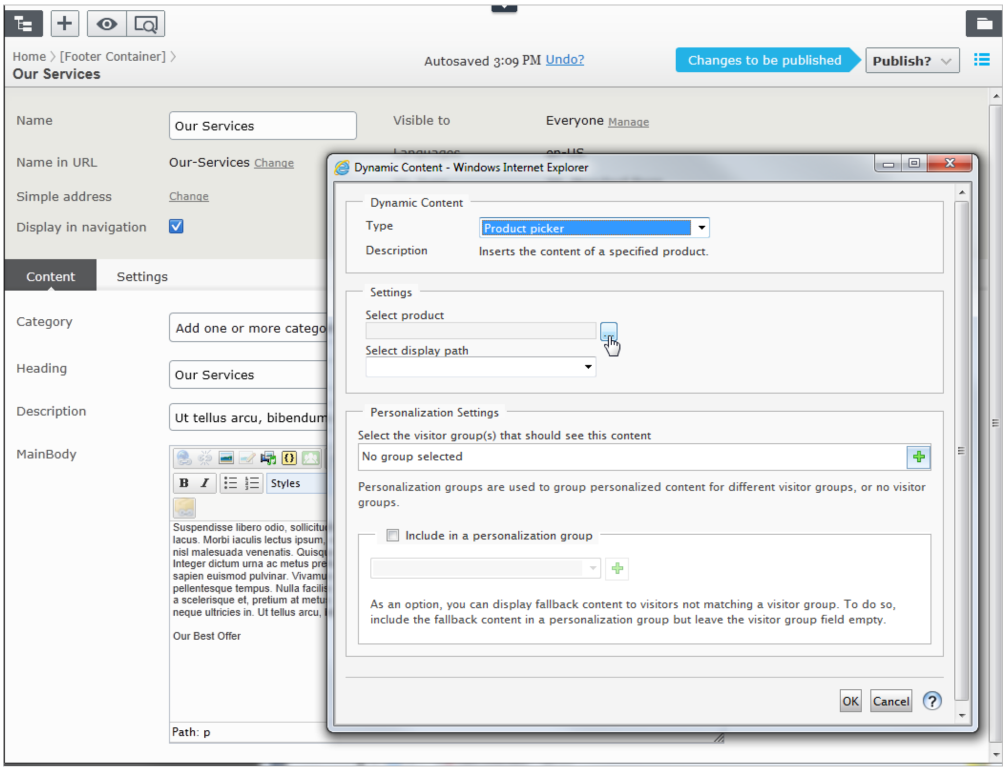
Introduction

The **Product Picker Dynamic Content** function is used for displaying products as dynamic content. In edit view in EPiServer CMS , the editor can use the function to display product information from the product catalog. This adds to the many possibilities with dynamic content, where you can reuse and display content in multiple places on the website, but will only need to update the information in one location.

Adding Product Information as Dynamic Content

Do the following to add product information as dynamic content to a page:

1. Open the page for editing in edit view and place the cursor in the editor where you want to add the information.
2. Select the **Dynamic Content** tool in the toolbar.
3. Select **Product picker** in the **Select plug-in** field. The product picker fields will appear in the **Settings** section.
4. In the **Select product** field, click the button to select a product from the Commerce Manager product catalog.
   The product picker dialog will appear, and you can select a product or a product category by expanding the product category tree, or searching in the search field. Select the desired product and click **Select**.
5. The product display template is defined in the **Select display path** (can be changed here if needed).
6. Click **OK**. A dynamic content box will appear in the editor. Save your changes and view the result in preview or view mode.



You can also personalize dynamic content, and display customized information to different visitor groups. Find out more under the *Personalization* section.

Editing Dynamic Content for a Product

Do the following to edit dynamic content for a product:

1. Open the page for editing in edit view and place the cursor in the editor where you want to add the information.
2. In the dynamic content box, select the **Edit** option. The product picker dialog will appear, and you

can selected another product or product category. Click **OK** when done.

3. Save your changes and view the result in preview or view mode.

Removing Dynamic Content for a Product

Do the following to remove dynamic content for a product:

1. Open the page for editing in edit view.
2. Select the dynamic content box and press **Delete** on your keyboard.
3. Save your changes to the page.

Scheduled Jobs

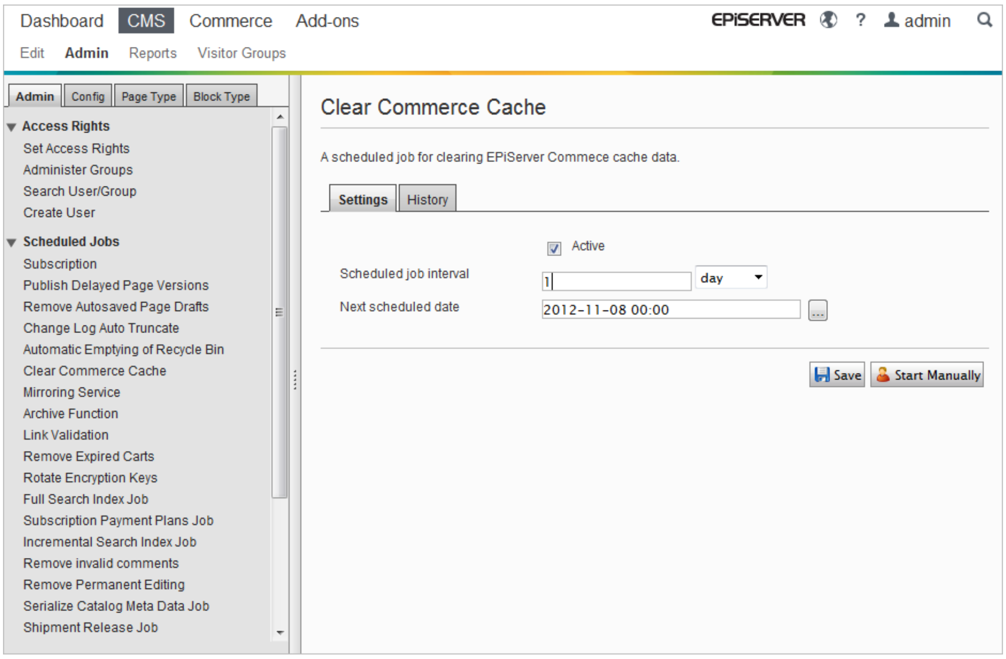
Introduction

A **scheduled job** is a service performing a specific task that can be executed repeatedly at a given time interval or when an administrator manually executes it. When installing EPiServer Commerce there will be a few scheduled jobs added to your website, that are specifically needed for Commerce functions. These scheduled jobs are administered from the EPiServer CMS administration interface. For more information on how to use the EPiServer CMS administration interface, refer to the user documentation for EPiServer CMS.

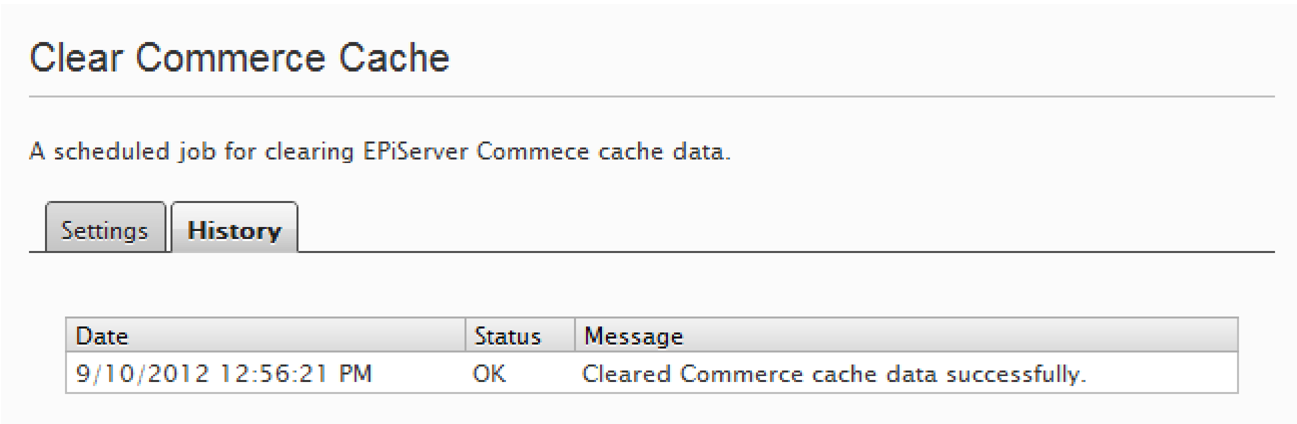
Administering Scheduled Jobs

Do the following to manage a scheduled job:

1. Login as an administrator and navigate to the EPiServer CMS **Admin** mode.
2. Select the desired schedule job under the **Scheduled Jobs** section of the **Admin** tab
3. Check the **Activate** check box to activate the scheduled job.
4. If you want to run the scheduled job manually, click **Start Manually** and the job will be executed.
5. If you want the scheduled job to be run automatically, set the desired time interval in the **Scheduled job interval** field.
6. The time when the scheduled job will be run the next time will be displayed in the **Next scheduled date** field.
7. Click **Save** to save your changes.



Under the **History** tab, you can monitor the status and results when the scheduled job has been executed.



Refer to the section *Default Scheduled Jobs* for more information about scheduled jobs included with EPiServer Commerce.

Default Scheduled Jobs

Introduction

In a sample installation of EPiServer Commerce, a number of **scheduled jobs** will be added to the administration interface of EPiServer CMS. In this section we describe the jobs that are included by default with EPiServer Commerce. Refer to the *Scheduled Jobs* section for more information on how to administer scheduled jobs.

Available Scheduled Jobs

Clear Commerce Cache

When importing or deleting a product catalog, it will be necessary to clean the runtime cache in order to make the website up to date. This is done using the **Clear Commerce Cache** scheduled job. This job can be executed repeatedly at given time intervals, or manually. After the job has been executed, in order to verify that the cache has been cleared, you need to **refresh** the catalog display pages.

Remove Invalid Comments

In EPiServer Commerce it is possible for customers to review a product and add comments about it. When a product is deleted and no longer available in the system, it is also recommended to remove comments associated with the deleted product in order to maintain system accuracy. This is done by the **Remove Invalid Comments** scheduled job. The scheduled job can be executed repeatedly at given time intervals, or manually.

Remove Expired Carts

Shopping carts are created by shoppers from the front-end site, and then converted to a purchase order during the checkout process. Carts that are "abandoned" and not converted into an order, will be stored in the system for a certain time before they expire. The **Remove Expired Carts** job will remove expired carts when executed.

Rotate Encryption Keys

Encryption keys are used for securing sensitive customer data and is set on meta fields. The **Rotate Encryption Keys** job will rotate the encryption keys used by the system. Refer to the *EPiServer Commerce SDK* for more information on encryption.

Full Search Index

The **Full Search Index** job will perform a full search indexing.

Subscription Payment Plans

Payment plans are used for generate recurring payments, for example for magazine or grocery subscriptions. The **Subscription Payment Plan** job will ensure that these recurring payments are regularly generated as a background process.

Incremental Search Index

The **Incremental Search Index** job will perform an incremental search indexing.

Serialize Catalog Metadata

The **Serialize Catalog Metadata** job is used for serializing catalog data to speed up the meta data retrieval when searching catalogs.

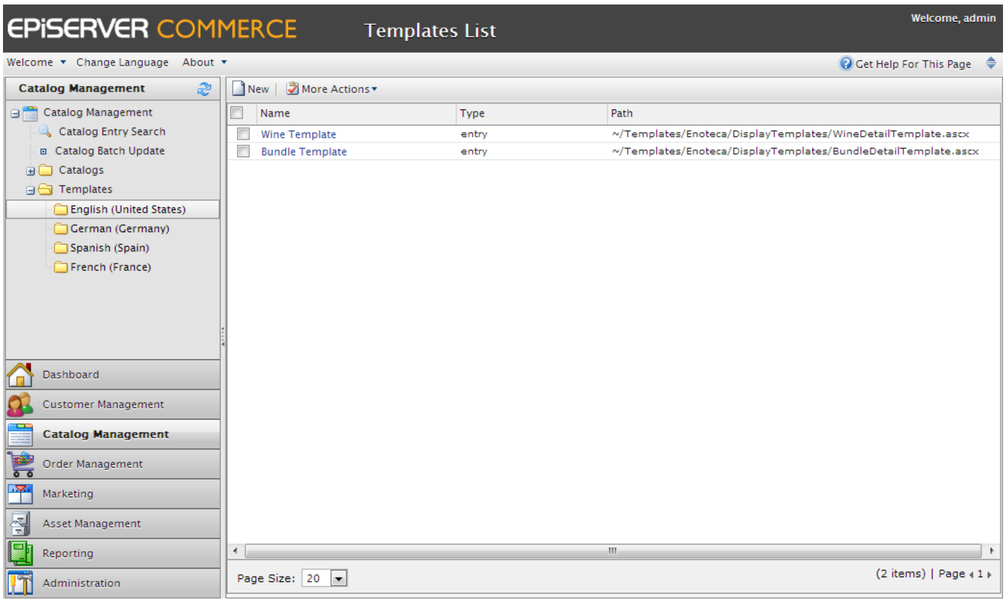
Shipment Release

The **Shipment Release** job searches for releasable shipments in active orders. If the difference between current time and shipment creation time is greater than the configured time span, the shipment status for the order will be changed to "released".

Defining Display Templates

Introduction

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. On the EPiServer Commerce sample site, the display templates will automatically be imported and configured during the installation procedure. However, when new templates have been created you may want to define their use in the system, or modify the use of existing ones. This is done in Commerce Manager in the **Catalog Management** sub-system under **Templates**.



Adding a display template

1. Under **Catalog Management**, select **Templates** and click **New**.
2. In the **Name** field, enter the name of the display template, for instance "WineTemplate".
3. In the **Friendly Name** field, enter the display name for the template, for instance "Wine Template".
4. In the **Type** field, enter the type of display template, for instance "entry".
5. In the **Path** field, add the path to the display template, for instance: ~/Templates/WineStore/DisplayTemplates/WineDetailTemplate.ascx.
6. Click **OK** to save your changes.

Updating an existing display template

1. Under **Catalog Management**, select **Templates** and the language version and template that you want to update.
2. In the **Name** field, enter the name of the display template.
3. In the **Friendly Name** field, enter the display name of the display template.
4. In the **Type** field, enter the type of display template.
5. In the **Path** field, add the path to the display template.
6. Click **OK** to save your changes.

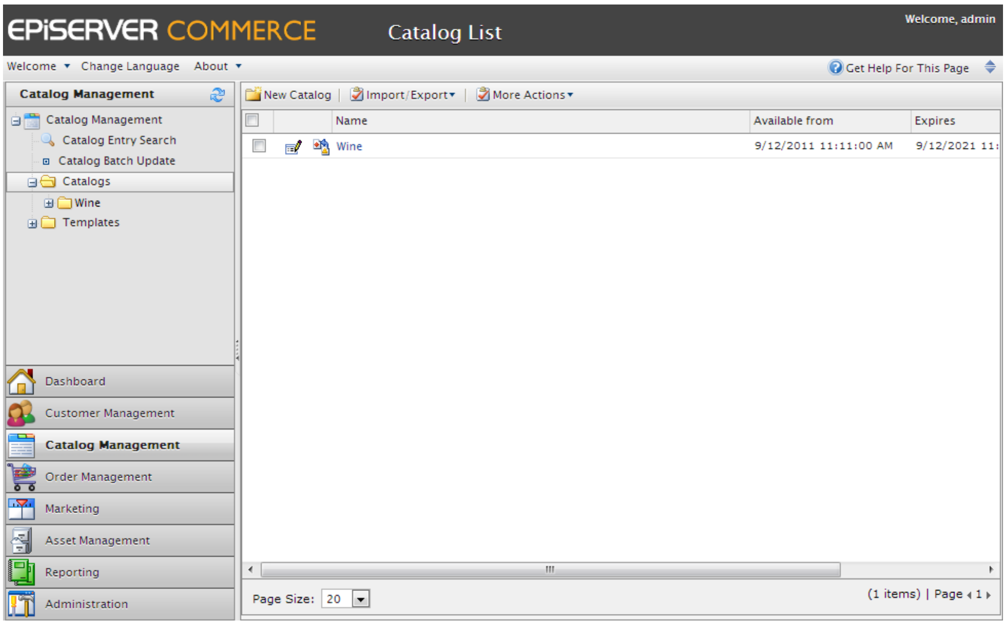
Sample Catalog Import

Introduction

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. This will normally be done automatically during the installation procedure for the EPiServer Commerce sample site.

However, there may be occasions where you need to import a product catalog, and the procedure is therefore described in the following. There are different ways of doing this, and in this example we describe how you manually import the sample catalog for 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.

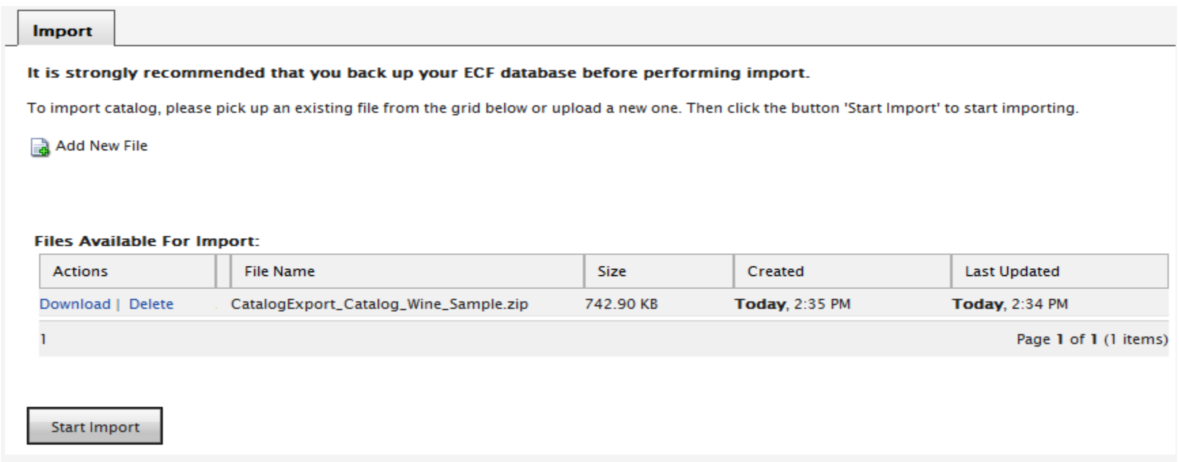
Additional information on how to import product catalogs can be found in the *Catalog Management* section.



Importing the Sample Catalog

The sample site includes two product catalogs providing the "everything" and the "brand" view.

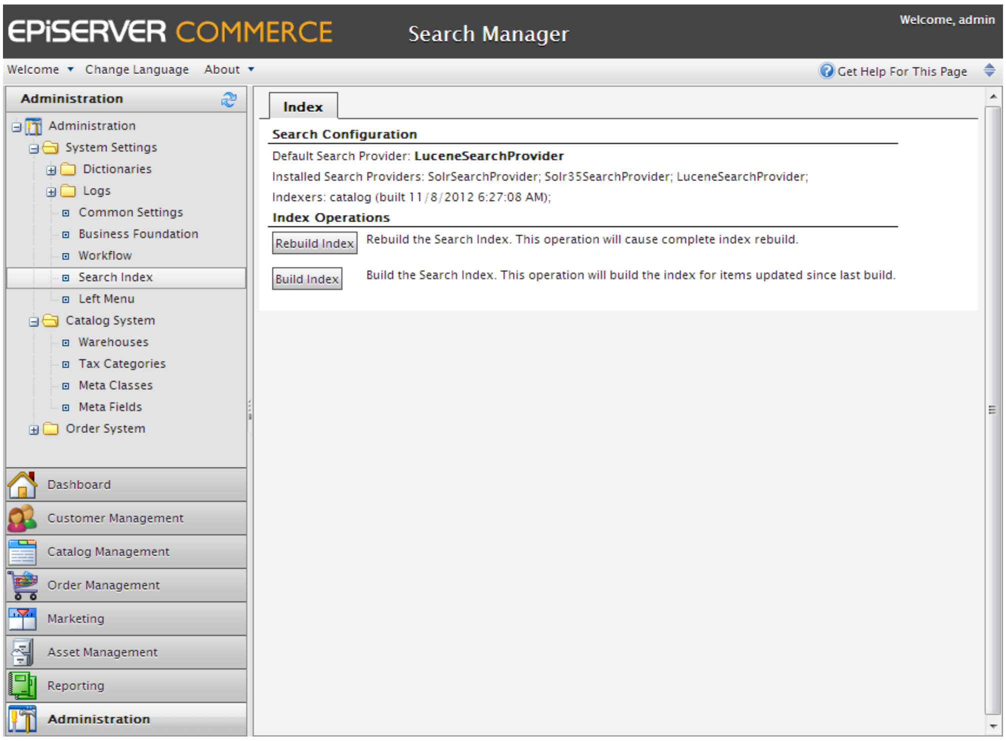
1. In Commerce Manager, select **Catalog Management** and then **Catalogs**.
2. Click on **Import/Export** and then **Import Catalog**, this takes you to the **Import Catalog** screen.
3. Select the catalog zip file, in this case "CatalogExport_Catalog_Wine_Sample.zip" and click **Start Import**.
4. When the import has completed, click **Close Window**.
5. Select "CatalogExport_Catalog_Wine_Sample.zip" and click **Start Import**.
6. When the import has completed, click **Close Window**.



Indexing the Sample Catalog

After importing a product catalog, this 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.



Managing Content

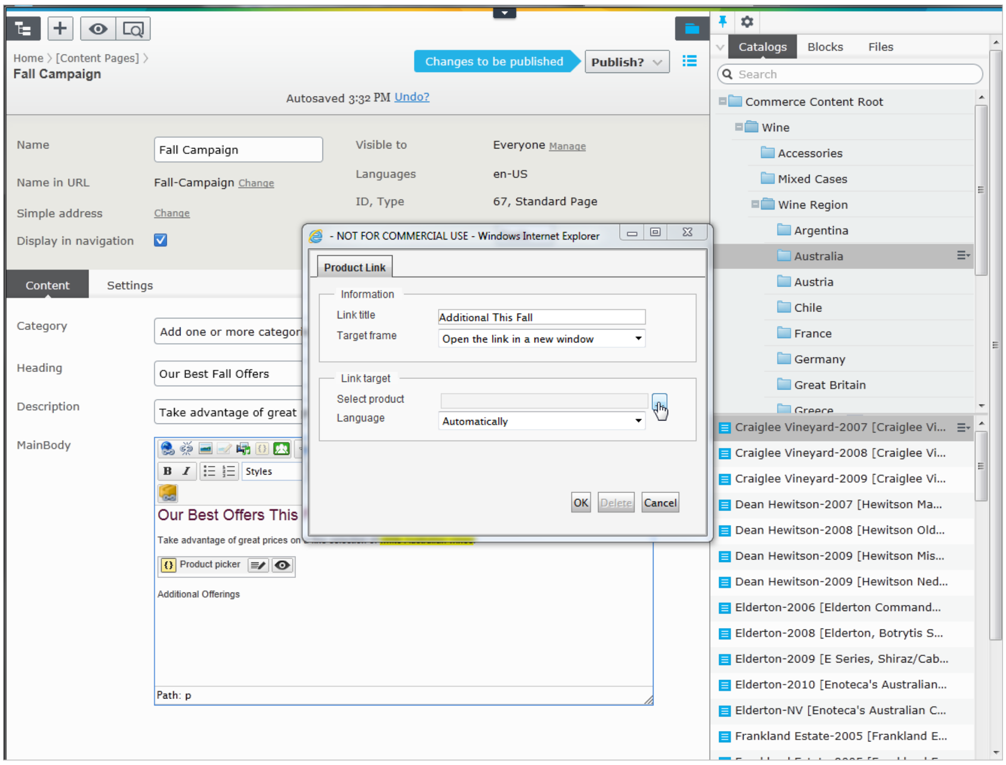
Introduction

Content on a website can originate from different **sources**, depending on where on the site and by whom it has been created. Content can be created and updated by internal or external editors and marketers, by e-commerce administrators, or by the "shopping community" on the website. On the EPiServer Commerce sample site for instance, shoppers can rate and add comments to products.

Editorial Content

On the EPiServer Commerce sample site, certain parts of the content is editorial, meaning that it will be created and updated by editors or marketers from inside EPiServer CMS. Typically this type of content builds the basic structure of the website and describes the products, the e-commerce company and the services delivered, support and contact information. There can also be newsletters and articles related to products and services delivered.

From the edit view you can work with content, create campaigns and add product information using the *Product Link Tool*, or you can *add product information as Dynamic Content*.



Community Content

The EPiServer Commerce sample site offers some interactivity allowing shoppers to review, comment and rate product items. This content which will also be displayed as part of the entire website content, and as a website owner you may like to monitor and approve information created from this source. In EPiServer Commerce this can be done through the *Comment Approval* and *Comment Abuse Report* gadgets.