EPiSERVER

EPiServer 7.5 Commerce

User Guide

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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 management and 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, configuration and site administration.

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).

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*.

From each view in the user interface with a help icon provided, click the icon to get context-sensitive help.

The described functions as well as the screen shot examples shown in this documentation are based on a standard installation with the sample site and templates. Treat any displayed data in the examples purely for illustration purposes.

Screen shot examples as well as glossary links are only displayed in English.

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.

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About EPiServer Commerce

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. There are numerous possibilities to extend the built-in functionality, for instance through the EPiServer Add-on Store.

> EPiServer Commerce is flexible and made for integration with other systems. This documentation describes a **sample installation** based on the sample template package for EPiServer Commerce. Please be aware that your specific system may differ from what is described here, and all parts described may not be available on a specific customized website.

Catalogs and product management

With the *Catalog features* you can manage catalogs, product categories and products. 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.

An intuitive user interface makes it easy to add new products and change the structure of a catalog. You can quickly add or modify a product in one location and it will automatically update across all of your e-commerce websites and channels. Furthermore, you can run multiple catalogs in parallel on the same platform. You can also associate and recommend related products to increase your upsell and cross-sell opportunities.

Order management

EPiServer Commerce includes flexible order management features where customers can perform returns and exchanges, ship to multiple addresses, modify orders and track packages. You can also create recurring orders and process them automatically.

The *Orders* subsystem is where you monitor, track, change or create new orders, ship out items, and create returns/exchanges. Orders are highly flexible, with the possibility to create purchase orders with various options including split payments, split shipping, and split shipping addresses. You can also create a one-page "fast" checkout or allow customers to make a purchase without registering on your site.

EPiServer Commerce supports a number of payment types, currencies and shipping options so you can easily expand your business into new markets. The platform also includes tax and shipping calculations that automatically show your customers all of their costs upfront, including duty and taxes.

Merchandising

Merchandising is about improving the customer experience, displaying relevant products and increase conversion rates. EPiServer Commerce can automate your merchandising, so you can bring more targeted visitors to your website and turn them into customers. You can easily *create product landing pages* by uploading content and drop it into place. Through the use of shared blocks, content will automatically update throughout the entire site.

Use the *personalization features* to create targeted content. EPiServer Commerce lets you define personalization criteria such as the number of orders and amount spent within a defined period, along with customer buying intention for a specific product type or category. You can get detailed information about your visitors and their buying patterns, and *monitor your e-commerce website* to see how much a customer has spent over time and how often they return to your site. You can also learn what visitors are looking for and what products are the most popular.

Customer management

Customer management in EPiServer Commerce include the ability to store customer records and track orders that have been placed across multiple websites. You can also access shopping carts and wish lists to see what your customers want at any point in time. Internal users, customers, partners and organizations are managed through the same interface. 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 subsystems and menu items within each system.

Pricing and promotions

With EPiServer Commerce it is easy to launch campaigns. You have the option to choose a preset promotion or create a custom campaign of your own, all managed without the need for web development. You will have complete control over promotions, from developing custom discounts to deciding when the campaign should go live.

Promotions are managed from the *Marketing subsystem*. Create your own promotions or use built-in ones such as "Buy N of product X and get a discount" or "Buy N of product X and get one free". Create a promotion that is visible prior to checkout or configure a promotion to be displayed during checkout. You can also apply a shipping cost discount.

EPiServer Commerce automatically shows your customers targeted promotions based on their industry, interests, demographics or any other data. You can also develop custom campaigns and pricing based on sales seasons or regions. The extensive built-in pricing and information rules include volume pricing, tiered pricing and pricing for specific customer groups.

Internationalization

With EPiServer Commerce you will have one platform to create and deploy any number of localized e-commerce websites. A unified web interface lets you control all of your product catalogs, customer data and local market data. You will have *globalization support* to manage your content, products and regional settings for *multi-markets*.

The EPiServer Commerce multiple *language, payment, shipping, tax and currency options* help you meet the needs of international customers. For example, you can create custom promotions for specific markets to further drive sales, or enable regional origin/drop shipping to better support international operations.

Multi-channel commerce

Using EPiServer Commerce *content can be created in one place*, and easily shared and distributed through multiple channels such as mobile, social, e-mail, as well as on the e-commerce website. You can create targeted campaigns for instance by offering a special promotion code to anyone who "likes" your Facebook page or scans a QR code in a mobile campaign. New channels can easily be added for future use.

Agile commerce

EPiServer Commerce offers a number of site testing tools, so you can change your site in a controlled way and measure the results of each change. For example, you can let the system perform A/B tests to get an instant view of how your content is performing. You can also remove a change if it is not increasing your conversion rates. Refer to *Managing content* for more information on how to work with content optimization.

Security

EPiServer Commerce gives you total control over who can access your e-commerce website back-end to ensure that unauthorized users do not modify your website or view customer data. You can *configure access rights* for users, user groups and functions. EPiServer Commerce has a number of predefined roles for managing store procedures as well as website content and files, but you can also set up your own set of roles. You can also work with predefined virtual roles, for instance to create access based on *personalization and visitor groups*.

Asset and media management

An "asset" can be for instance a block or media such as an image, a PDF file, a software package and other down loadable files that are often related to a product or some content on the website. With the *asset management* feature in EPiServer Commerce you can upload, organize and share assets to make them available for usage on the website.

Content management

Marketers and merchandisers will work from the *editorial interface* to create and update content. Perhaps you want to *create a campaign or a landing page* and *edit product content* in the product catalog. Or maybe create news or an article with content related to the products in your online store. You can 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.

Administration and configuration

EPiServer Commerce is a flexible system made for customization, and with numerous configuration possibilities. From the *Administration* section in Commerce Manager you can manage various e-commerce administrative and configuration tasks such as setting up shipping and payment gateways, default language, currency, units, tax configuration, and search settings.

From the administration interface in EPiServer CMS you will manage common website administrative task such as setting access rights for web pages in the page tree and block folder structure, management of scheduled jobs, and globalization settings. Refer to the user guide for EPiServer CMS for more details.

The sample site

EPiServer Commerce comes with a sample site including 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.

Roles and tasks

EPiServer Commerce is a flexible system and online stores based on this can be set up in many different ways, depending on the purpose they serve. This documentation is targeted towards a set of assumed user groups and roles, for instance website visitors and users editing content and working with e-commerce tasks. A user may have one or more roles, depending on the size and setup of the organization. The roles and their tasks are described below, with references to applicable documentation parts.

Visitor

A visitor is someone using a web browser to visit the website, on an e-commerce site possibly with purchasing intentions. Purchasing can be done either "anonymously" (payment and shipping details provided), or by registering an account. Visitors can contribute to website content by rating, reviewing and commenting on products, if such features are available.

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. Refer to the sections *Catalogs* for more information.

Marketer

The marketer *creates content and campaigns* with targeted banner adverts to ensure customers have consistent on site experience of the various marketing channels. Furthermore, the marketer monitors campaign KPIs to optimize page conversion. Refer to the sections *Marketing* and *Gadgets* for more information.

Customer service

The customer service function within e-commerce manages tasks related to customer accounts, orders, payment and shipping. Depending on the organization structure, customer service may be divided into for example these sub-roles:

- **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.

Refer to the sections *Customers* and *Orders* for more information.

Administrator

An administrator works with configuration and system settings in areas such as catalogs, marketing and customer and order management, as well as user access rights and visitor groups for personalized content. Administrators may also install new features from the EPiServer Add-on Store. Administrators usually have extended access rights compared to other user groups. Refer to the sections *Administration*, *Access rights* and *Personalization* for more information.

Editor

An editor is someone with access to the editorial interface, creating and editing content on the website. Editors can be either frequent or occasional users, and they may or may not have publishing rights. Parts of the editing functionality may also be used by merchandisers and marketers when editing product information.

Website owner

The website owner or e-commerce manager, is someone with an overall responsibility for the content and performance of one or more websites. These users will access the *Dashboard* to monitor various types of website activities such as page conversions, customer reviews or sales progress. Rarely creates content but can be involved in the approval of content created by others. Refer to *Gadgets* for more information.

Content moderator

Content may be added by editors, or by visitors or community members if social features and community functionality is available for the website. This includes for instance product reviews, ratings and comments, where there might be a need for monitoring and managing this type of content. This can be done

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for instance by a marketer or an editor, or a specific moderator role for large websites and shopping communities. Refer to *Gadgets* for more information.

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.

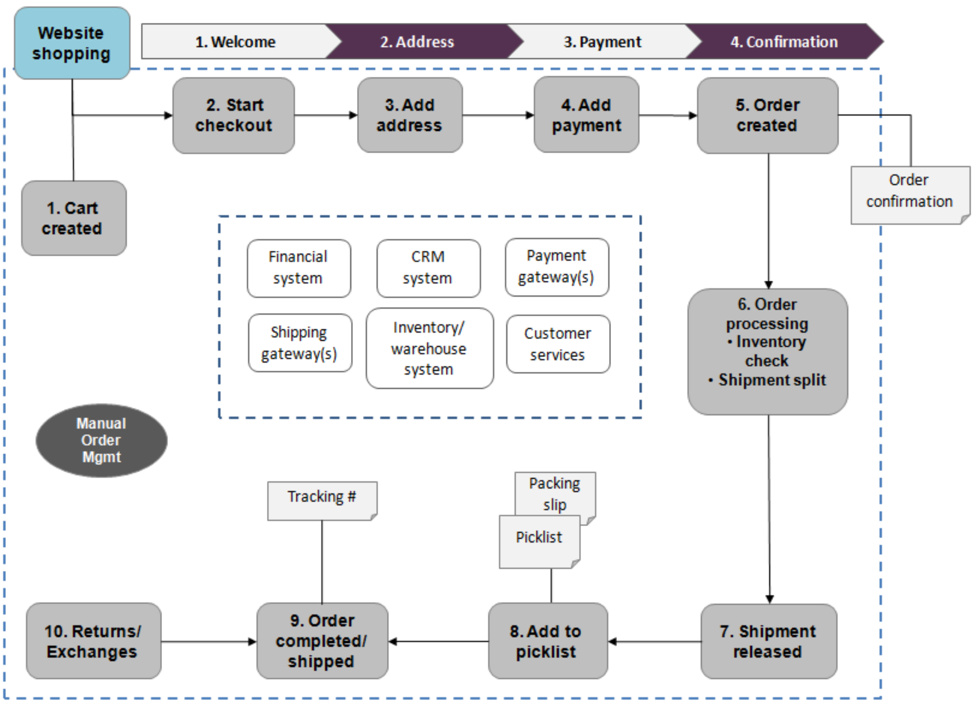
Depending on how you chose to work with your online store administration and product content, you will define your user roles and groups, and give them access rights to the different parts. Example of user roles in EPiServer Commerce are content editors, marketers, business owners, and store and system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

Step-by-step process

A "typical" B2C shopping workflow involves a number of interactions between a visitor 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 B2C type of shopping workflow and the actions and tasks involved.

Shopping process



1. **Cart created**
   In this example, a customer does not need to register on the site in order to buy. The order process actually starts as soon as the visitor 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 customer does not complete the checkout procedure, the cart will remain in the system for a specified time.

   When the customer 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 customer returns to the cart at a later stage.
2. **Start checkout**
   When the customer 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" customer, or automatically if the customer 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 customer 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 customer confirms the purchase, and an order confirmation is sent to the customer. 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.
- **Product Information Management (PIM) system** - for managing product details.

You also have the possibility to extend your EPiServer Commerce solution with additional modules from EPiServer and third-party providers. Extension modules are available from the EPiServer Add-on Store in the *global menu* in EPiServer, or from *EPiServer*.

Getting started

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

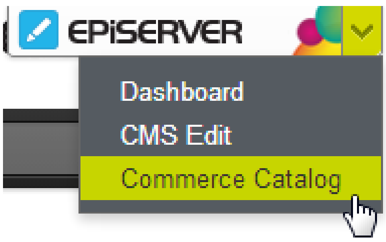
As an editor or administrator, you usually log in to your website using a specified URL or a log in button. On the EPiServer Commerce sample site, clicking **Log In** in the top menu will take you to the login page of the website. Enter your user name and password, and click **Log In**.

Note that the login page on the sample site is the same for both customers logging in to their account, as well as for editors and Commerce administrators. 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 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.

Select **Commerce Catalog** to access Commerce directly to work with e-commerce features.



You can also go directly to your personal dashboard by selecting the **Dashboard** option, or to the CMS Edit view by selecting **CMS Edit**.

Navigation

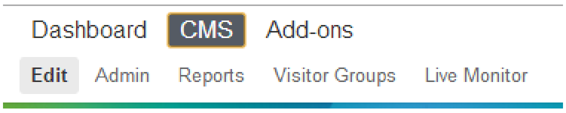
Pull down the **global menu** available at the very top to navigate your way around. In the menu you will find the different systems integrated with your website. Select **Commerce** to display the Commerce options.Select **Catalogs** to work with products in Commerce, **Commerce Manager** for additional store administration features, or **CMS** for *managing other website content*.

> 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.

Introduction

The **EPiServer platform** with OnlineCenter is the common framework used by EPiServer products, containing features available with all product installations. OnlineCenter offers an overview with easy access to all installed systems. From here you can also access the online help, perform global searches, and customize your settings.

The **global menu** at the top holds the navigation for all systems integrated with your website. This is a plug-in area which can also be used to provide access to third-party products integrated with EPiServer products.



The upper left part of the global menu holds the following options:

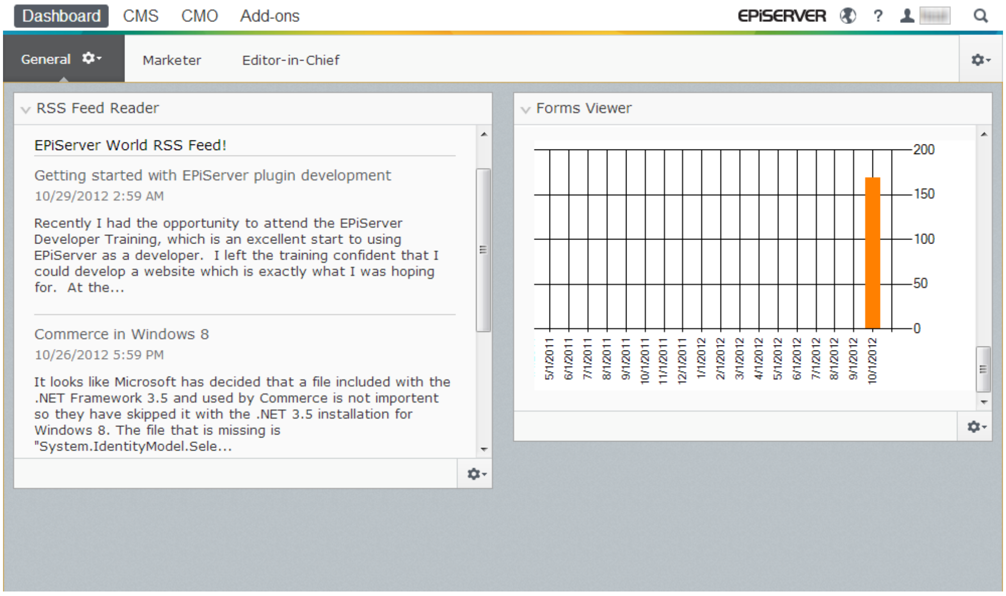
- **Dashboard** features a customizable area where you can add gadgets for quick access to common tasks or other activities on the website. A **gadget** is a small application that can be made available for easy access from the **Dashboard** in EPiServer OnlineCenter and the **assets pane** and **navigation pane** in EPiServer CMS and EPiServer Commerce. There are gadgets available both for the EPiServer platform as well as product-specific ones, for example gadgets for forms viewing, visitor groups statistics, version management and the product catalog in Commerce. Developers can create customized gadgets for specific purposes, see *EPiServer Framework SDK*.
- **[Products]** features the system interface for the various products in your installation where you manage the content on your website, for example, text and images on web pages in EPiServer CMS and products in EPiServer Commerce. Depending on which system you select in the menu, the submenu on the second row will change to display the functions for that specific system. Please refer to the relevant product-specific documentation.
- **Add-ons** provides access to the EPiServer Add-on Store where system administrators can manage plug-ins and upgrades for both EPiServer and third-party modules.

The upper right part of the global menu holds the following options:

- EPiServer logo takes you to www.episerver.com.
- **?** provides access to the online help for the various products in your installation.
- The earth globe symbol provides view options for the websites.
- The user profile symbol provides access to personal system settings, license agreement and to log out from the website.
- The magnifier symbol allows you to perform a *global search*.

Dashboard

The **Dashboard** is a personal area used for aggregation and display of important website information. The dashboard is also a plug-in area where you can add customized gadgets for presenting high-level information or provide quick access to common tasks or frequently used features. It can be for instance viewing recently changed pages or monitoring a web form.



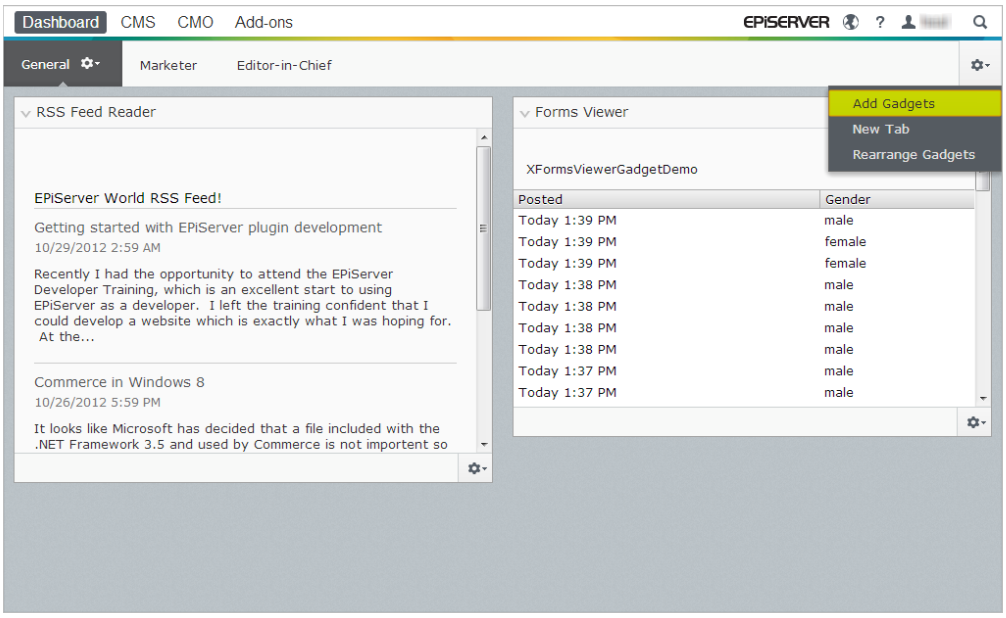
When logging in to the website, the dashboard can be accessed by selecting **Go to my Dashboard** in the EPiServer log in dialog, or from the **Dashboard** option in the global menu.

You can do the following when working with the dashboard:

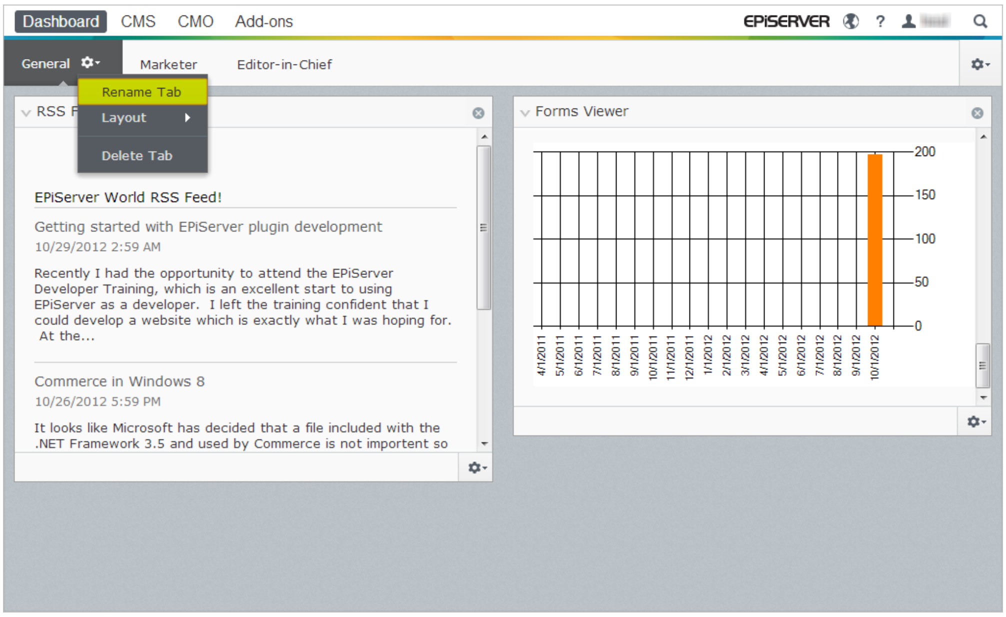
- **Organizing the dashboard**. Adding, editing and deleting tabs and columns. You can divide the layout of the dashboard tabs into one, two or three columns, depending on your choice.
- **Gadgets**. Organizing gadgets in columns and under tabs. Adding, editing and deleting gadgets, see *Gadgets*.

Tabs

Tabs are used for organizing the dashboard information. You can create your own tabs, and add gadgets of your choice. You can for instance have one tab for the marketing team, and one for product editors, with specific gadgets available for each of these groups. You can customize the layout of each tab by setting the number of columns for displaying information. There will always be at least one default tab available in the overview.

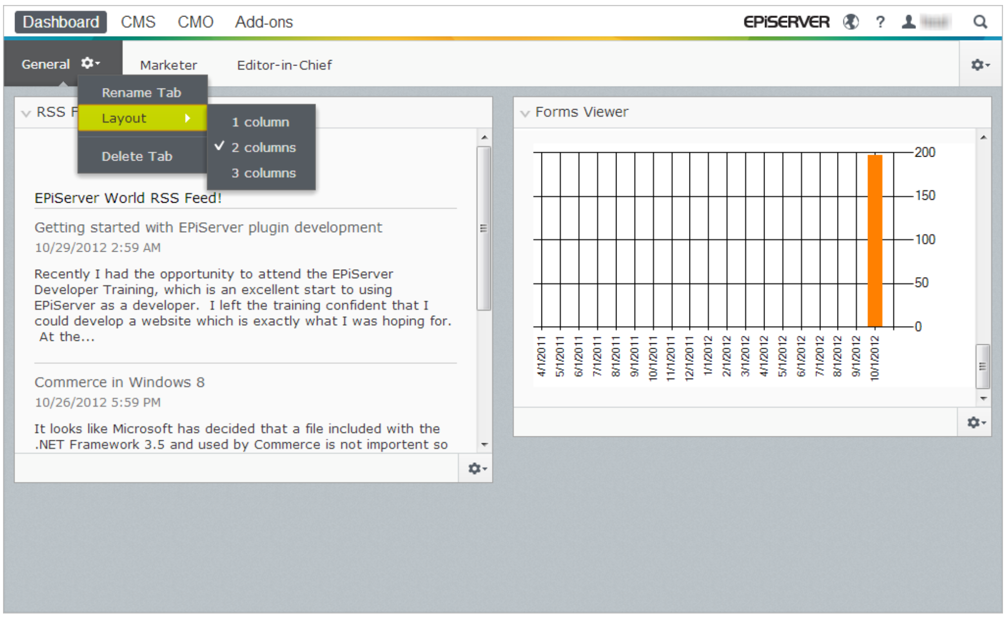


Creating Tabs



Add a new tab on the dashboard as follows:

1. Select **New Tab** from the dashboard menu.
2. Select **Rename Tab** in the drop-down list for the tab you want to add and type a name for the tab.
3. In **Layout**, define how many columns the tab information area will have by clicking one of the available options.
4. Add the gadgets you want to the tab you have just created as described in *Adding a Gadget*.



You cannot change the order of tabs after they have been created.

Editing Tabs

Edit a tab on the dashboard as follows:

1. Click the arrow for the tab you want to edit. You have the following options:
   - Select **Rename Tab** to change the name of the tab.
   - Select **Layout** to change the number of columns on the tab. All existing gadgets will be moved to available columns in the new layout.
2. Select **Save** to save your changes.

Deleting Tabs

Delete a tab from the dashboard as follows:

1. Click the arrow for the tab you want to delete.
2. Select **Delete Tab** in the drop-down list for the tab you want to delete.
3. Select **Yes** to confirm the deletion.

There must always be at least one tab available on the dashboard, which means that the last remaining tab cannot be deleted.

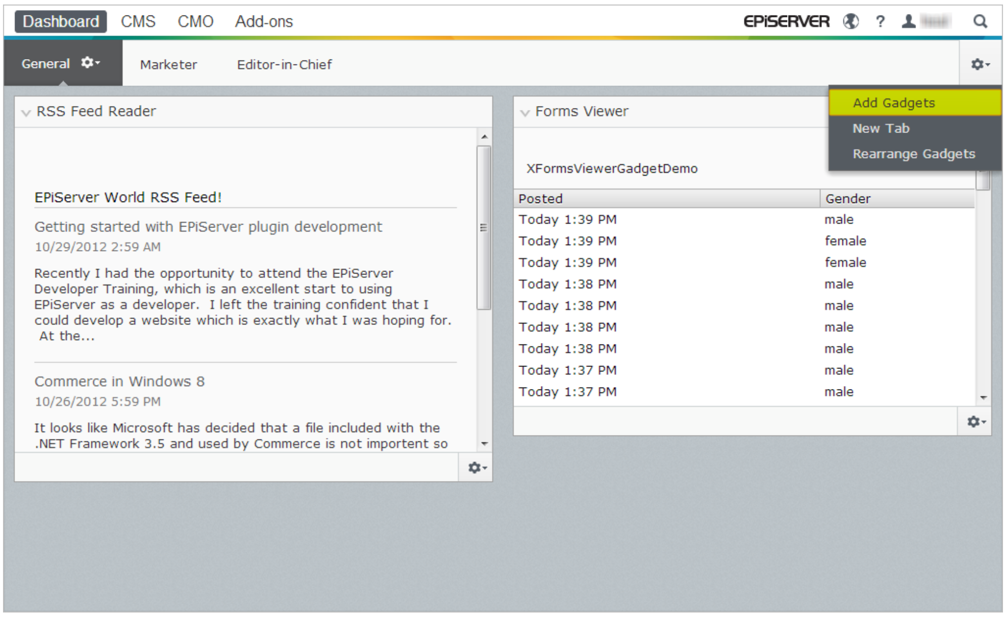
Gadgets

A **gadget** is a small application that can be made available for easy access from the **Dashboard** in EPiServer OnlineCenter and the **assets pane** and **navigation pane** in EPiServer CMS and EPiServer Commerce. There are gadgets available both for the EPiServer platform as well as product-specific ones, for example gadgets for forms viewing, visitor groups statistics, version management and the product catalog in Commerce. Developers can create customized gadgets for specific purposes, see *EPiServer Framework SDK*.

Each gadget has a drop-down menu in the upper right corner. What you see in the menu depends on the functionality available for the gadget, but you will most often find at least the **Edit** and **Delete** options here.

You have the following options:

Customizing your gadget settings



You can customize your settings on the panes by adding, moving and deleting gadgets. You have the following options:

Pane settings. Click the cogwheel symbol to open a menu with gadget options, for example, add gadgets to the pane.

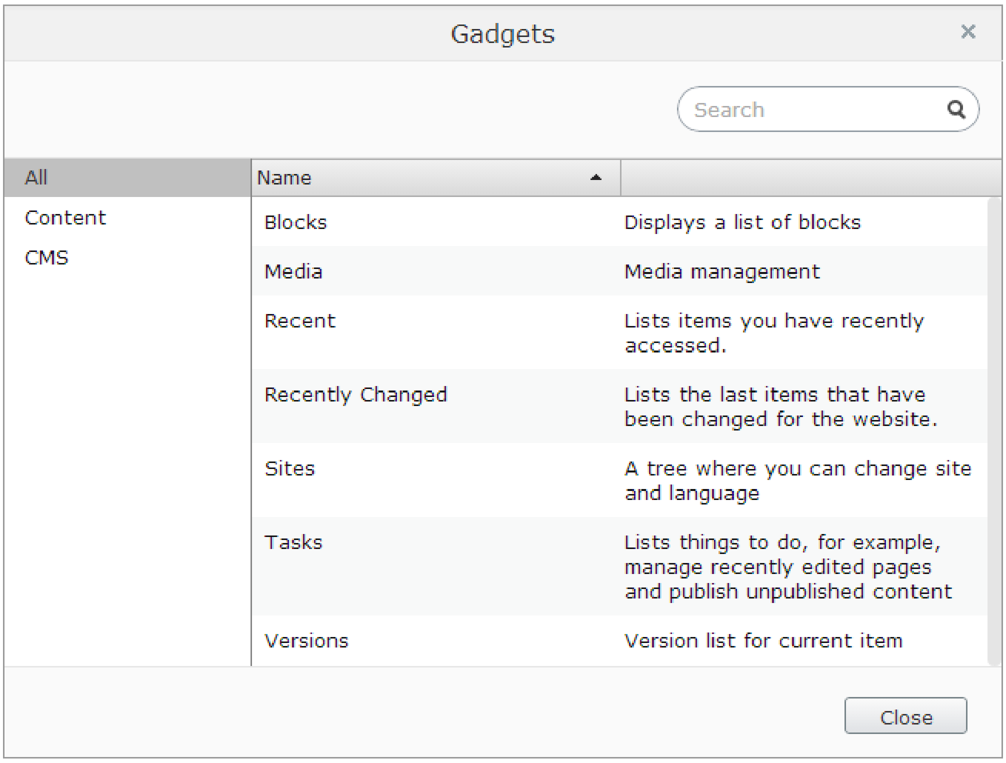
Gadget settings. Click the arrow next to the cogwheel symbol to select options for the specific gadget, for example, remove the gadget from the pane.

Gadgets options. Click the arrow to select options for the specific gadget.

Toggle minimize and maximize gadget. Click to minimize and to maximize the gadget.

Remove. Click to remove a gadget.

Adding a gadget



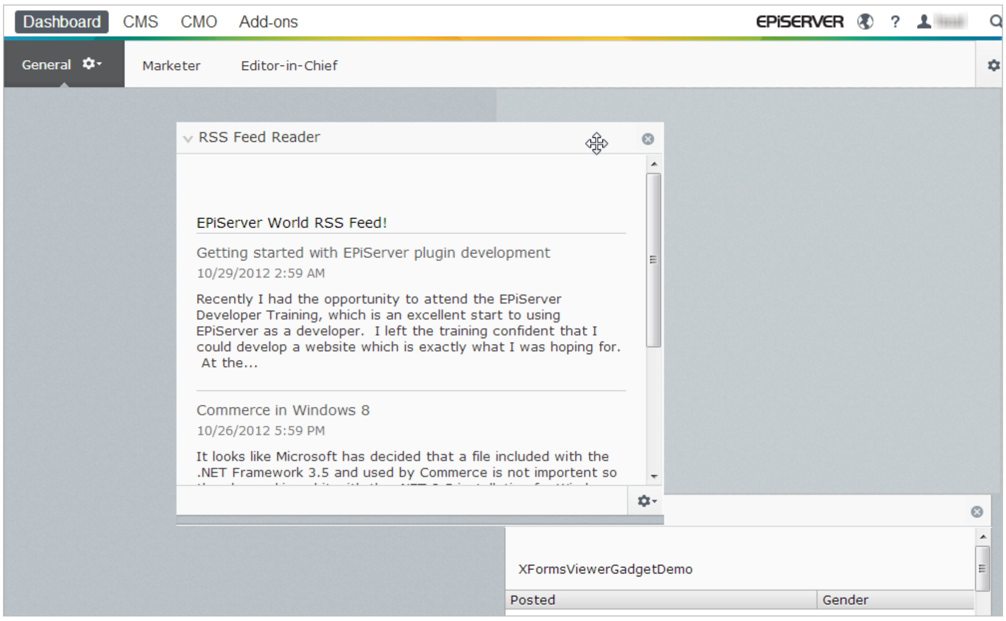
Add a gadget to the pane as follows:

1. Click **Add Gadgets**.
2. The **Gadgets** window shows a list with all gadgets. By clicking the product name to the left, you can filter product-specific gadgets.
3. Click the plus symbol for the gadget you want to add. If you select several gadgets, they are added on the pane in the order you have selected them.
4. Click **Done**.

Moving a gadget

The dashboard and panes are locked by default. You can organize these areas by moving gadgets around and placing them where you want them.

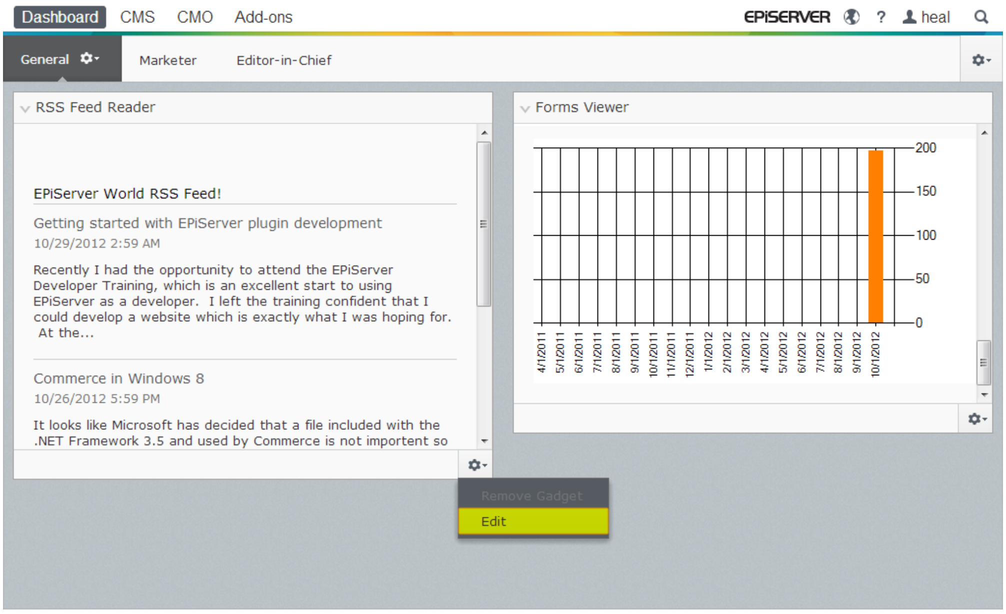
The dashboard is organized into columns, and gadgets can be moved up and down in a column, and between columns.



Move a gadget on the dashboard and panes as follows:

1. Select **Rearrange Gadgets** to unlock the settings.
2. Move a gadget in the pane by dragging it to the highlighted area where you want it, and then drop it.
3. Select **Rearrange Gadgets** again to lock the settings.

Editing a gadget

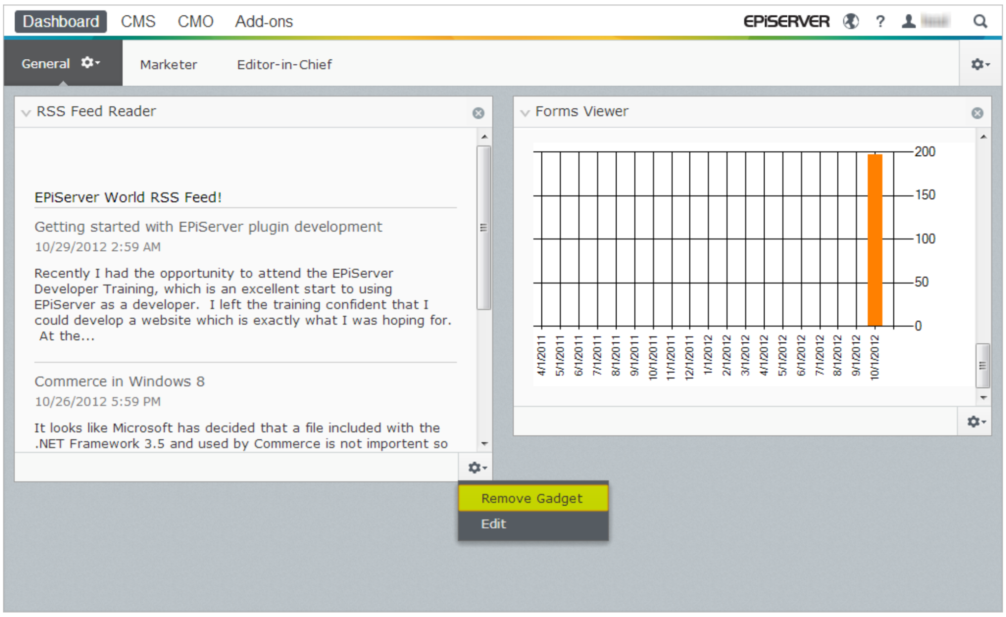


Edit a gadget as follows:

1. Click **Select Options** and select **Edit** . Depending on the type of gadget, editing can be done in different ways.

2. Change the options for gadget. For example, for the **Forms Viewer** gadget you can change the number of items displayed in the regular and maximized view.
3. Select **OK** to save your changes.

Removing a gadget



Remove a gadget from the dashboard and panes in any of the following ways:

- Unlock the pane and click for the gadget, and lock the pane again.
- Select the gadget settings and select **Remove Gadget**.

Out-of-the-box gadgets

A **gadget** is a small application that can be made available for easy access from the **Dashboard** in EPiServer OnlineCenter and the **assets pane** and **navigation pane** in EPiServer CMS and EPiServer Commerce. There are gadgets available both for the EPiServer platform as well as product-specific ones, for example gadgets for forms viewing, visitor groups statistics, version management and the product catalog in Commerce. Developers can create customized gadgets for specific purposes, see *EPiServer Framework SDK*.

Gadgets on the dashboard

The following gadgets are available on the dashboard on the EPiServer CMS sample site:

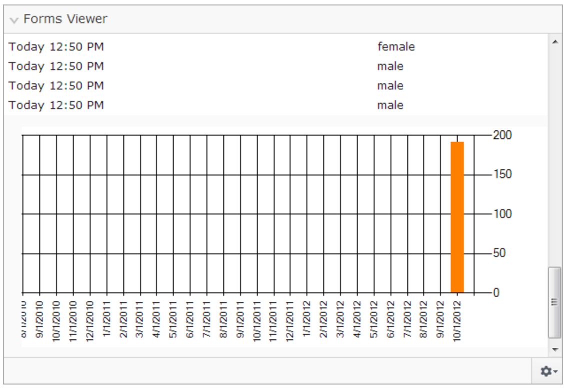
Forms Viewer

The **Forms Viewer** gadget provides a possibility to monitor the activity for a specific web form, for instance a poll, a registration or contact form. This is intended not only for editors, but anyone who has an interest in the activities of your website, for instance a marketing or business area manager.

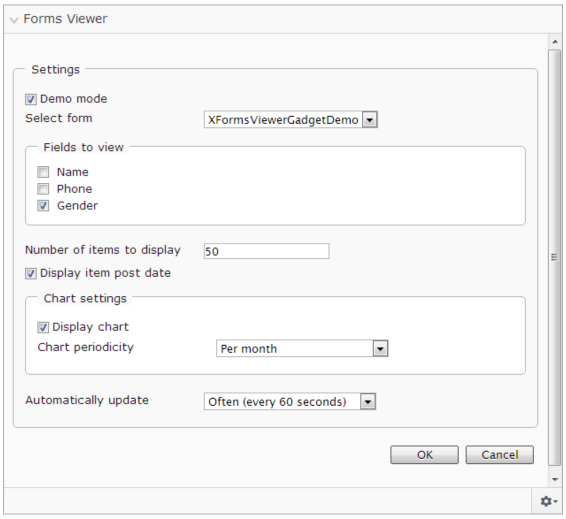
The **Form Viewer** will display a selected number of the latest activities for instance the latest votes or registrations to a form. The result of the **Forms Viewer** gadget can also be displayed graphically, providing a quick and easily interpreted overview of the form activities.

Add a form and configure the settings for the**Forms Viewer** gadget as follows:

1. Click **Edit** in the drop-down list in the top right corner of the gadget.



2. Select **Demo mode** to view the form in graphical demo mode. Note that you will need to prepare a demo view file of the form. This will then appear in the **Select Form** drop-down list. There is an example form viewer, “XFormsViewerGadgetDemo”.



3. Select a form in the **Select form** drop-down list. Depending on the form you select, you will get different options of fields to include in the viewer. In this example, a contact form with a name, e-mail and a message, has been selected.
4. In the **Display item post date**, you can choose to display the date of the form posting.
5. Select the number of form post to display in the **Number of items to display** field.
6. Select **Display chart** to display a chart for the form.
7. Select the periodicity for the chart in the **Chart periodicity** drop-down list.
8. Select the frequency for information update in the **Automatically update** drop-down list. This setting determines how often the information in the forms viewer will be updated.
9. Select **OK** to save the settings.

External Links

The **External Links** gadget provides an overview of the external links of your website. This is useful if you want to find out to which external websites you are referring to from your own site.

Add external links as follows:

When adding external links, you can select the number of items to display in the list. The list will display the number of pages that contains one or several links to each external web address. You can also choose to see a more detailed item list by selecting **Show details**. This option will display the full URL for each link.

Notes

With the **Notes** gadget you can add “post it” notes on the dashboard. When you have inserted the **Notes** gadget on the Dashboard, you can enter the text directly in the notes area. You can also customize the appearance of the **Notes** gadget.

Set up the **Notes** gadget as follows:

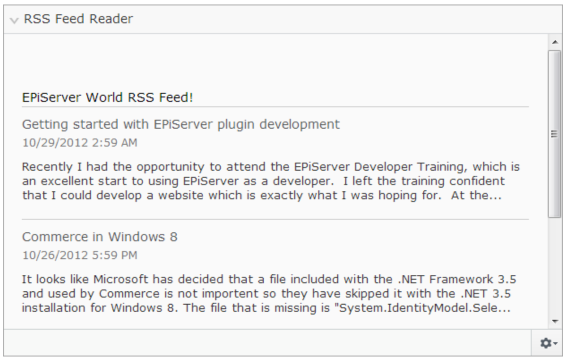
You have the following customizing possibilities for the **Notes** gadget:

- Change the text size by selecting a size in the **Text Size** field.
- Select a background color in the **Background Color** field.

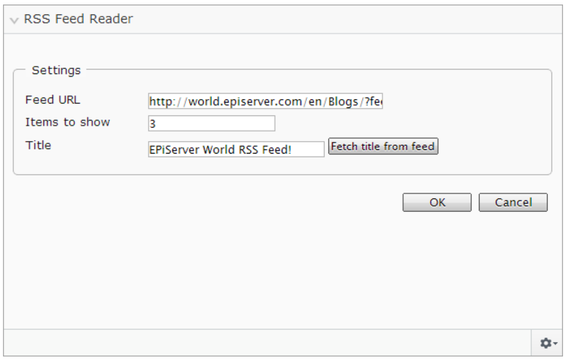
RSS Feed Reader

The **RSS Feed Reader** gadget is a example of how you can use gadgets to display RSS feeds on the dashboard. The gadget shows the latest feeds from an RSS source of your choice. You can define the number of feeds to be displayed in the gadget.

Set up the **RSS Feed Reader** gadget as follows:



Enter the URL for the RSS feed of your choice. Define the number of feed items to be displayed and enter a title for the RSS feed. Click **Fetch title from the feed** to use the default title from the source. Click **OK** to save the RSS Feed Reader gadget. You can create multiple RSS Feed Reader gadgets if you want.



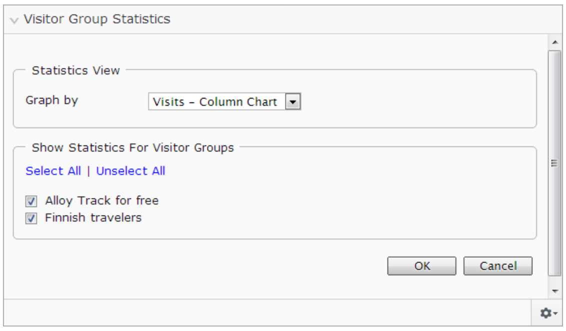
Visitor Groups Statistics

The **Visitor Group Statistics** gadget displays an overview of selected visitor groups in different time periods. You can set up the **Visitor Group Statistics** gadget to follow statistics for the visitor groups viewing the personalized content. By default statistics will only be counted once per session for each visitor group.

You can use this gadget on the dashboard, on the panes, as well as in your iPhone or iPad.

Set up **Visitor Group Statistics** as follows:

1. In the **Statistic View** section, select to show the statistics in the following views:
   - **Visits - Column Chart**. Shows statistics for visits as column bars.
   - **Visits - Line Chart**. Shows statistics for visits as a line chart. Use if you want to view the statistics for only one visitor group.
   - **Total visits - Pie chart**. Shows total statistics for visits in a pie chart.

2. In the **Show Statistics For Visitor Groups** section, select the visitor groups you want to include in your statistics. Or, use the jump buttons **Select All** and **Unselect All**.
3. When you are done, click **OK**.
4. You can change the display of the statistic diagrams **Graph by**, use the jump buttons to see the statistics in the following diagrams:
   - **Graph by**, use the jump buttons to see the statistics in the following diagrams
   - **Day**. Shows statistics for visitor group matches the latest day.
   - **Month**. Shows statistics for visitor group matches for the latest month.
   - **Year**. Shows statistics for visitor group matches for the latest year.
   - By clicking the **Select Date Interval** icon, you can select the start and end dates in the statistics interval.

EPiServer CMS-specific gadgets

The following EPiServer CMS-specific gadgets are available in the editorial interface on the sample site:

Pages

The **Pages** gadget provides a list of all pages on the website in a tree structure.

Sites

The **Sites** gadget gives you access to change language in the tree structure on your site.

Tasks

The **Tasks** gadget provides a list of tasks in the navigation pane to take action on.

Blocks

The **Blocks** gadget gives you access to drag and drop shared content as blocks on a page and create new blocks, see *Managing blocks*.

Media

The **Media** gadget gives you quick access to upload and manage files and folders, see *Managing media*.

Versions

The **Versions** gadget fives you access to the version list of the page or block you are working on, see *Managing versions*.

Recent

The **Recent** gadget shows the content that you recently have visited.

Recently Changed

The **Recently Changed** gadget lists recently changed content on the website and selected language. You can choose to view either all changes or your own changes only. The list of changed content will be displayed showing name, status, modification date, the user who has done the change.

Commerce-specific gadgets

A gadgets is a small application that can be made available in the user interface. Gadgets can be added to the **Assets** and **Navigation** panes, as well as to the EPiServer Dashboard. The EPiServer Commerce sample site features a number of predefined gadgets suitable for e-commerce websites. The predefined Commerce-specific gadgets are described in more detail 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 in 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 in 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.

Community approval gadget

Users logged on to the sample site can add **comments (reviews)** to products on the site. The **Community 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 Community Approval gadget:

1. Log in 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 Community Approval gadget:

1. Log in 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.
5. ### Comment abuse report gadget
6. 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.
7. **Do the following to add and configure the Comment Abuse Report gadget:**
8. a. Log in to EPiServer Commerce and select **Dashboard** in the right-click menu.

b. Select the Dashboard tab under which you want the gadget to appear.

c. 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.

d. 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.

e. Click **OK** to save you changes. The gadget will be displayed on your dashboard.

9. **Do the following to use the Comment Abuse Report gadget:**

10. a. Log in 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.

b. 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.

c. Click **Remove Comment** to remove the comment. Select **Ignore** to leave the comment without any actions.

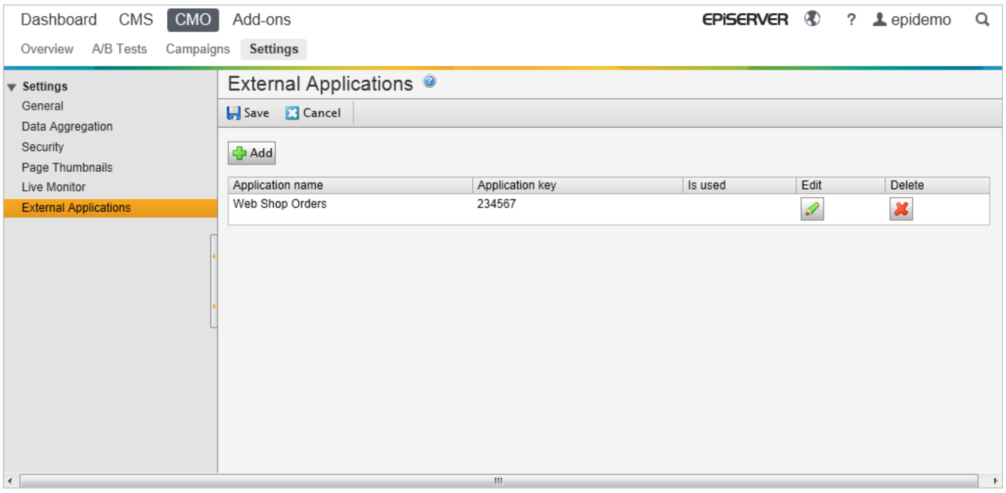
Commerce settings for CMO gadget

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 the 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 for EPiServer 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:

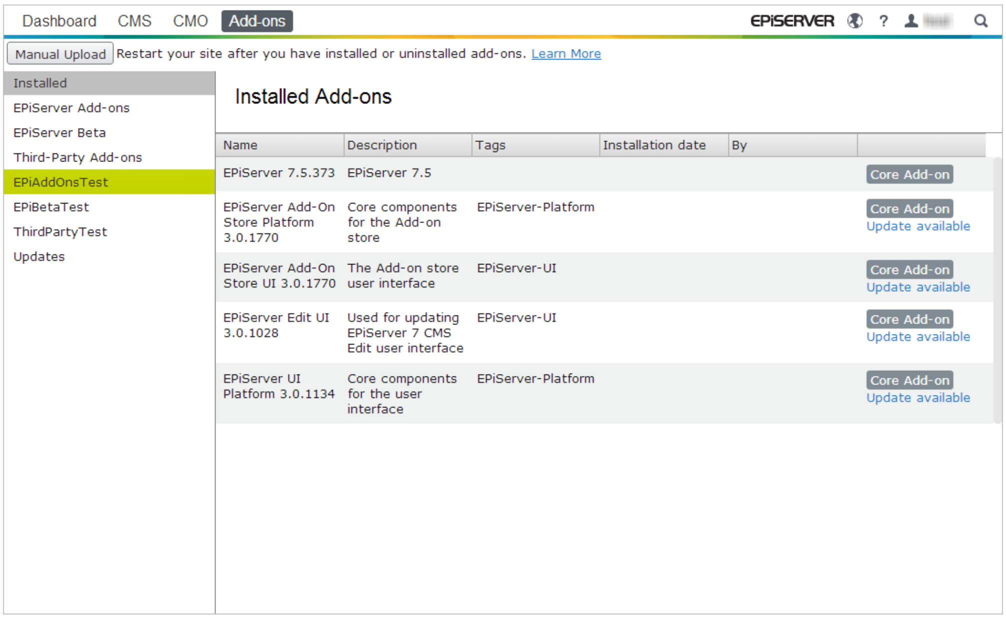
1. Open the EPiServer OnlineCenter Dashboard, and navigate to the **Commerce settings for CMO** gadget.
2. In the check box to the left, select the set of settings you want to delete.
3. Click the **Delete** button and click **OK** to confirm.

Add-on system

The EPiServer Add-on Store feature contains plug-ins and extensions developed by EPiServer and third-party companies, with which site owners and system administrators can extend their website platform. EPiServer Add-on Store makes add-ons easy to find and get started with, and ensures that they will work on the platform. With this feature you can modularize upgrading of the platform by having smaller maintainable pieces, and can also add value to the platform that speeds up time to test and roll out new releases.

The EPiServer Add-on Store supports the following:

- Lists available packages for the environment (products, version) to install and uninstall in a list
- Lists available packages to upgrade, as well as see already installed packages in a list
- Provides possibility to add package files to the list for installation and upgrade through upload



Access the EPiServer Add-on Store by clicking **Add-ons** in the global menu. The EPiServer Add-on Store consists of the following views:

- **EPiServer Add-ons**, **EPiServer Beta** and **Third-Party Add-ons** shows the list of available modules from a feed that you can install, see *Installing a package*. You can browse or search to see available add-ons that can be installed on your website, or which can be updated. EPiServer provides a sample of add-on packages to get started with, and you can test some add-ons in a beta version. Some add-ons can be purchased, and others are free. Here you will also see information about the package and instructions after installation for a quick start.

- **Installed** shows the list of installed modules you can upgrade or uninstall. When an update is available you will also be notified about it here.
- **Updates** shows the list of all available upgrades, see *Upgrading a package*. The EPiServer Add-on Store on the website will be able to determine which add-ons that can be installed based on the particular platform version. In addition, add-on packages can have dependencies on other add-on packages, which will ensure that these can only be installed or uninstalled in such combinations that all dependencies are met.
- **Manual Upload** is where you upload and install module packages as files on your website that has not been listed in EPiServer Add-on Store, see *Uploading a package as a file for installation or upgrade*.

EPiServer Add-on Store has the following buttons:

- The **Install** button will add the module to the site and the **Uninstall** button will remove the module from the site.
- The **Update** button will upgrade the module to the site.

> ***Tip*** Clicking any of the header columns in the **Installed** view makes it possible for you to sort the installed add-ons in ascending or descending order, by tags, date and more.

> ***Tip*** Clicking **More information** on an add-on provides detailed information, such as name, description, creator, and dependencies. The add-ons can be tagged for browse filtering.

> ***Note*** To access the EPiServer Add-on Store interface for installation, upgrading and uploading, you need to be a member of either the **CmsAdmins** or the **PackagingAdmins** role.

The packages for installation and upgrading are in nupkg file format. For detailed technical information about how to develop your own add-ons to upload in the EPiServer Add-on Store, refer to the *EPiServer Framework SDK > Developer Guide.*

Installing a package

Install a package as follows:

1. Under **Add-ons** > select **EPiServer Add-ons**. You can also install beta versions and third-party add-ons.
2. Select the package you want to install and click **Install**. Confirm the installation.
3. You will receive an action feedback message. After the uninstallation has finished, click **Restart site now** if that button appears to restart the website.

Uninstalling a package

Uninstall a package as follows:

1. Under **Add-ons** > select **Installed**.
2. Select the package you want to uninstall and click **Uninstall**. Confirm the uninstallation.
3. After the uninstallation has finished, click **Restart site now** if that button appears to restart the website.

Updating a package

When an update is available for the installed add-ons on your website, you will be notified by the **Update** option.

Upgrade a package as follows:

1. Under **Add-ons** > select **Installed** or **Updates**.
2. Select the package you want to upgrade and click **Update**.
3. After the uninstallation has finished, click **Restart site now** if that button appears to restart the website.

> ***Note*** Also the EPiServer Add-on Store itself on your website sometimes needs to be upgraded. It works like installing any add-on except for that it cannot be uninstalled (the **Uninstall** button is unavailable).

Uploading a package as a file for installation or update

You can also manually install or update add-ons through multiple files upload.

Upload a package as follows:

1. Under **Add-ons**, select the **Manual Upload** button.
2. Click the **Select Packages** button and browse to one or several packages you want to install and click **Install**. The package will be installed to the local repository as well as deployed on the site.
3. After the uninstallation has finished, click **Restart site now** if that button appears to restart the website.

Generic functions, toolbar and panes

Using the toolbar and the panes in the user interface of EPiServer CMS edit view gives you access to the relevant functions when working with the content and its structure. Some buttons can be unavailable in your installation, which means either that you are not authorized to use them or that they has not yet been activated.

There are two ways of editing content in the user interface: Through the **on-page editing view** and the **all properties editing view**.

The following functions are commonly used in EPiServer products:

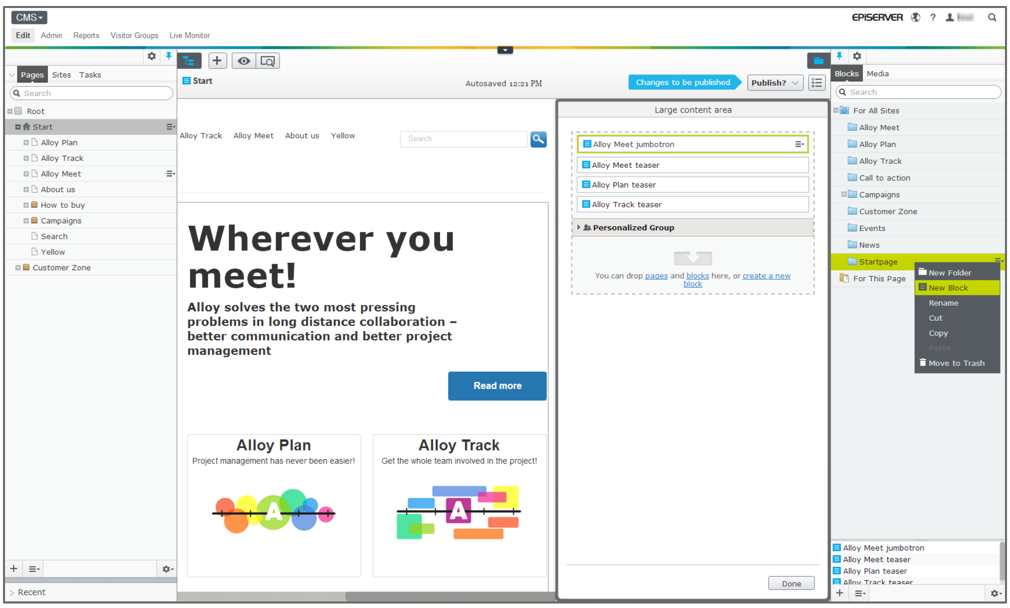
- **Context-sensitive actions**. You will only have access to the relevant actions in a context, for example, the preview option when editing a page. In addition, some options are only available if you have access rights, for example, publishing or removing content. The navigation pane supports common actions for pages in the tree structure, whereas the toolbar gives you access to the relevant actions in a specific context. For example, when you select a page to edit you are assumed to change the content as well as publishing the page. Therefore, only the buttons that are relevant for these functions are available.
- **Primary actions**. Some actions are opened in a new window, for example, to confirm that you want to move a page. The background appears dimmed, which means that you first must finish the action before you can continue. Another example is the publishing flow, where the bright color of the publishing button shows that it is the primary action.
- **Action feedback and notifications**. When you perform a successful action, for example, publishing a page, it is confirmed by a message.

  1 Some status messages also require an action from you, where a symbol displays the number of status messages for the content, for example, to notify you to take action if the page contains any errors.

- **Tooltip**. You can view information about the page as a tooltip on mouse-over, for example, buttons, pages in the tree structure.
- **Drag-and-drop operations**. You can drag pages, blocks and media to the page you are working with, as well as a page from the tree structure to create a link on the page. See *Assets*.
- **Keyboard commands**. You can use the keyboard for common actions in a standardized way, such as performing actions in the page tree or formatting text in the rich-text editor. This documentation describes available commands on the EPiServer CMS sample site issued on PC or Mac. The following standard keyboard shortcuts are most commonly used commands in the user interface:
  - Ctrl+c or Cmd+c to copy, for example, to copy a page in the tree structure
  - Ctrl+x or Cmd+x to cut
  - Ctrl+v or Cmd+v to paste
  - Esc to close a dialog or pane
  - Delete or Cmd+Delete, for example, to remove a page in the tree structure
- **Customizable user interface**. You can drag the panes to the size you want, pin your settings, and add gadgets to the **dashboard** in EPiServer OnlineCenter, as well as the **navigation pane** and the **assets pane** for quick access.
- **Support for different time zones**. Depending on which function you are using, the system time mainly works in the following way:
  - **Editorial interface**. When you are working with the content in the editorial interface, such as publishing and scheduling publishing, this is done in your local time zone.
  - **Administrative interface**. When you want to run scheduled jobs in the administrative interface, this is done in server time. Mostly this is the same as your local time zone, but for websites with editors and administrators in several countries this time zone can be different from your local one. Contact your hosting supplier to find out what is applicable to your website.

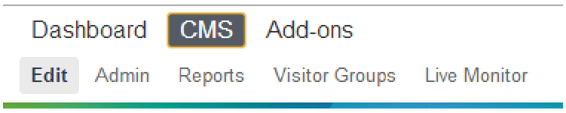
On-page editing view

The image below shows the user interface parts and their names used in this documentation.

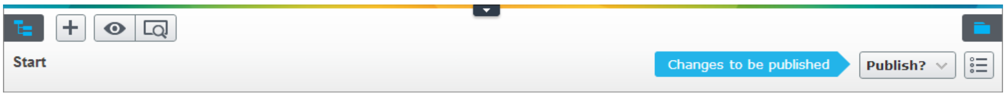


From **on-page editing view** you can access the following areas on the sample site:

- **Global menu** on the top is used for global navigation.



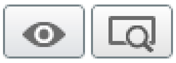
- **Toolbar** on the top contains the available tools for editing the content depending on which context you are working in.



On the toolbar you also have the following button for creating a new page and block:

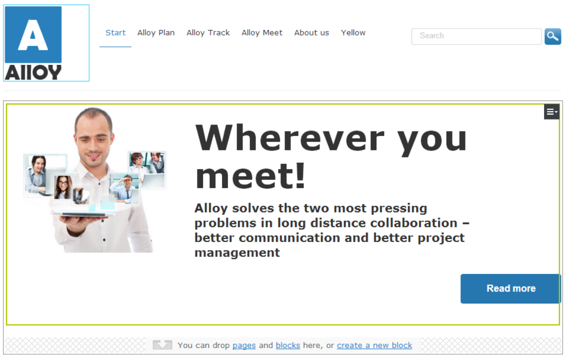
- **Add page** or **Add block**, see *Creating content*.

- **View options** and **Preview** are buttons to view the content in different ways, for example, language and resolution, see *Previewing*.



- **Content breadcrumbs** shows where in the tree structure the content is located on the toolbar. You can also click these breadcrumbs (links) to navigate on the website.

- **Content area** shows the current page, block or media item. It can also be a specific area on a web page for adding content through drag-and-drop operations, and editing content through the rich-text editor.



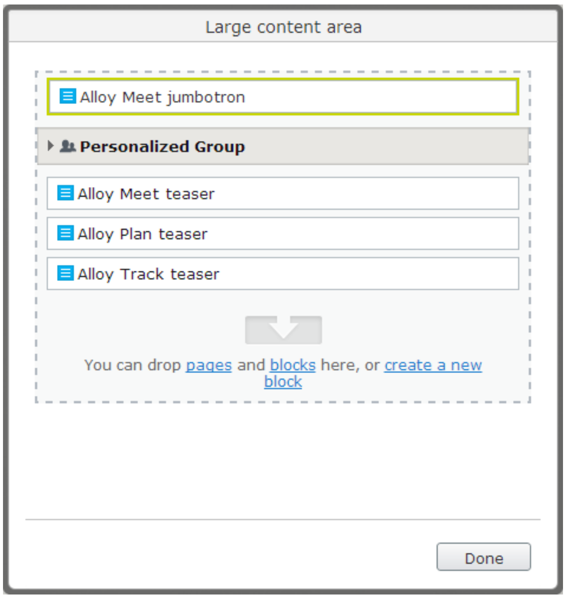
- **Navigation pane** to the left shows the pages of the website as a tree structure.
  - **Navigation pane button** opens the **navigation pane** to default width. You can then drag to expand the pane to the size you want, and pin it with the **pane pin** button.

  - **Navigation pane tab bar** on the top has the tree structure on the **Pages** tab in EPiServer CMS and the **Products** tab in EPiServer Commerce, as well as the activated website languages on the **Sites** tab, and tasks on the **Tasks** tab.

- **Assets pane** to the right contains a folder structure with blocks, media and other tools for customization.
  - **Assets pane button** opens the **assets pane** to default width. You can then drag to expand the pane to the size you want, and pin it with the **pane pin** button.

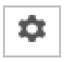
- **Assets pane tab bar** on the top has the blocks library on the **Blocks** tab, and the media files library on the **Media** tab.

- **Flyout pane** is where you can edit the content of a particular property, for example, sort the order of block items or link items. When you are done with editing the content, click **Done**. Your changes are automatically saved.

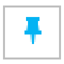


- **All properties button** opens the view where you can edit all properties for the content. See *all properties editing view*.

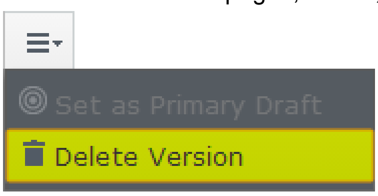
- **Pane settings** is where you can add gadgets to the pane, and change the order of them.



- **Pane pin** is used to pin the **navigation pane** and **assets pane**. If you have expanded the pane, pin to save your settings to the next time you log in to the website.



- **Notification bar** is used to show notifications, for example, how many pages that are using that particular content, or if content can be translated.
- **Autosave** saves all changes in the content automatically.
- **Actions menu** is a context-sensitive combo button on the toolbar with different publishing options that transforms depending of the content status and your access rights.
- **Content status** shows a short message, for example, if the content is ready to be published, or has been scheduled.
- **Context menu** shows the selectable options for a pane or gadget depending on which context you are in, for example, copy or move a page. These options are also available on mouse-over in the tree structure for pages, blocks, folders and media. See *Creating content*.



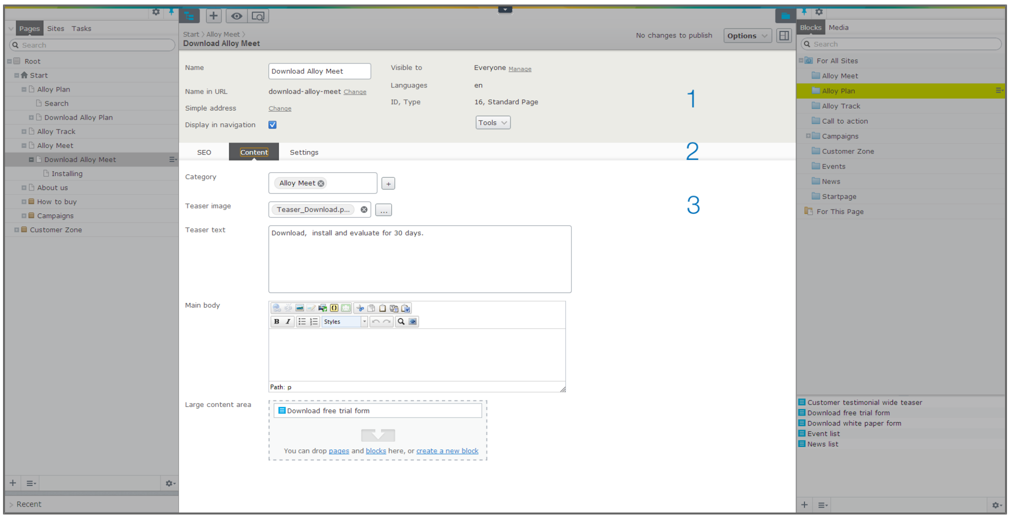
- **Gadget options**. Here you have the options to show content in other languages and move content to trash.

About how to use the on-page view for editing, see *Working in edit view*.

All properties editing view

The image below shows the user interface parts and their names used in this documentation.



From **all properties editing view** you can access the following areas in a standard installation:

- **Page settings** or **Block settings** contains status and important properties (marked as 1 in the image).
- **Tab bar** contains the tabs for the particular content type, and can be set up by configuration (marked as 2 in the image).
- **Tab content** shows the properties for the tab you have selected (marked as 3 in the image).
- **On-page editing button** opens the view where you can edit the content directly on-page.

About how to use the all properties view for editing, see *Working in edit view*.

Navigation pane

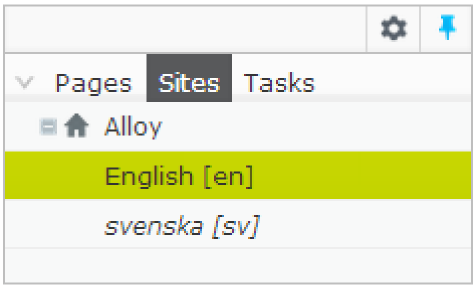
The **navigation pane** contains the page tree structure and other gadgets for navigation, which you can customize. You can drag the panes to the size you want, pin your settings, and add gadgets to the dashboard in EPiServer OnlineCenter and the panes for quick access.

For a list of available gadgets and how to add them to the dashboard or panes, see *Managing gadgets*.

The navigation pane has the following tabs in a standard installation:

- **Pages**. Here you can navigate and change pages in the EPiServer CMS tree structure. If there are many pages on your website, you can search for a specific page by typing the page ID or a keyword in the search box (the page's name or its content). All pages that match the keyword will be listed, select the page you are looking for, or click to clear your search and start over.
- **Catalogs**. Here you can navigate and change products in the EPiServer Commerce tree structure.

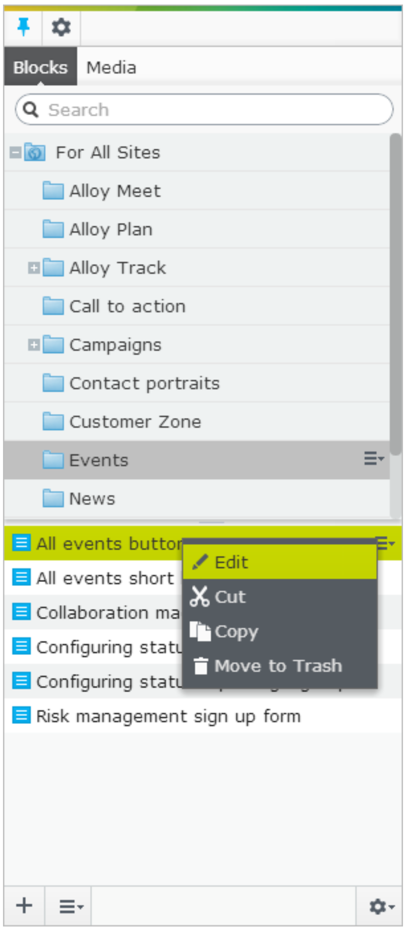
- **Sites**. Here you can work with your content in multiple languages.



- **Tasks**. A task is a piece of information related to activities in EPiServer CMS, activities that usually require some kind of action. Tasks can be assigned either to an entire group of people or to single individuals. A typical example is a page that is set as **Ready to Publish** by an editor without publishing rights, then a task will be created with a link to the page, available for review and publishing by someone with publishing rights, see *Saving and publishing content*.
  On the **Tasks** tab you can filter the following tasks:
  - **Draft**. Content that has not yet been published in **Not Ready** status.
  - **Rejected**. Content that has been sent to approval for publishing but was rejected.
  - **Ready to Publish**. Content that is set to **Ready to Publish** status waiting for approval.
  - **My Tasks**. Pages that are to be approved by you in a workflow.
  - **Marked as Being Edited**. Pages and blocks that you have marked as being edited in the all properties editing view. Use this list as a reminder to release the pages from the markup when you have finished editing them.
  - **Recently Changed**. Content on the website that was recently changed, see the *Recently changed gadget*.

Assets pane

The **assets pane** contains a folder structure with blocks, media and other tools, which you can customize. You can drag the panes to the size you want, pin your settings, and add gadgets to the dashboard in EPiServer OnlineCenter and the panes for quick access.



The assets pane has the following tabs in a standard installation:

- **Blocks**. Here you can work with reusable content on your website, see *Managing blocks*.
- **Media**. Here you can work with images, video, documents and other assets on your website, see *Managing media*.
- **Catalogs**. Here you can work with products in EPiServer Commerce.

For a list of available gadgets and how to add them to the dashboard or panes, see *Managing gadgets*.

Working in edit view

When you select content for editing, you have the following options on the toolbar:

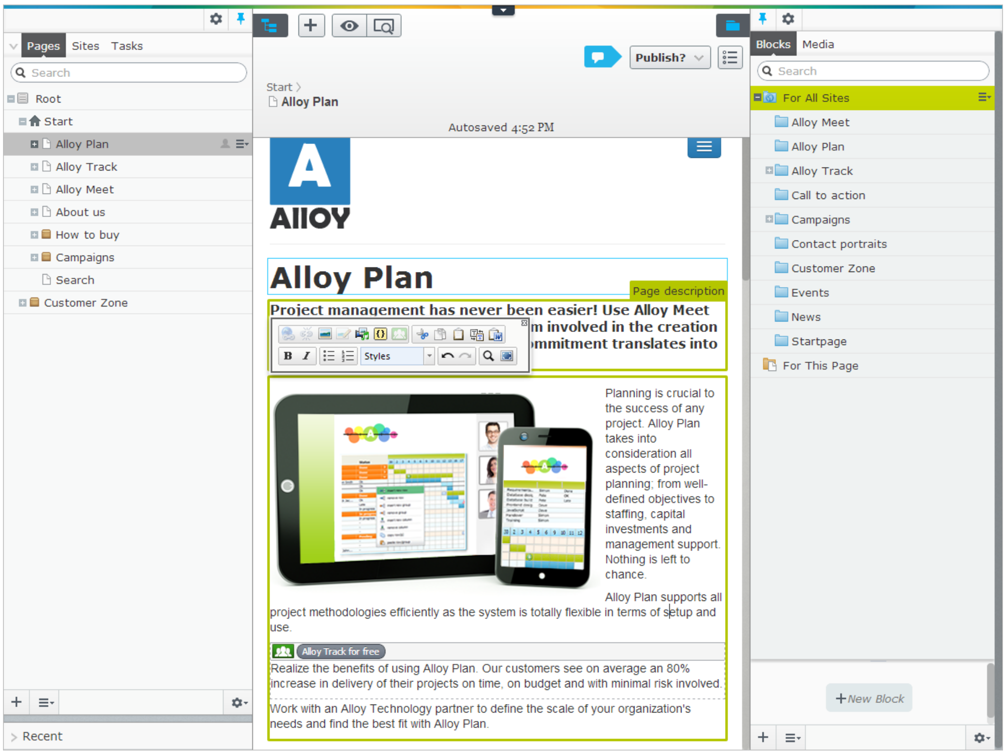
Options or **Publish**. Click any of the following options that appear on the combo button:

- The **Options** button appears until you change anything on the page.
- The **Publish?** button appears when you change any of the content on the page, and it transforms according to your access rights. The publishing option is displayed as the primary action by default. If you have access rights for publishing of pages, both the **Publish** and **Ready to Publish** options appear. If you do not have access rights for publishing of pages, only the **Ready to Publish** option appears.

Add content. On the toolbar you have the combo button with options to create **New Block** or **New Page**. Name the item and select content type. For a new page, the draft will be created beneath the page you have selected. For a new block, you will be prompted to select block library. To create new page or block, see *Creating content*.

All properties. Click to access all properties for editing the content. Default is on-page editing view.

Editing directly on a page



By default you can edit text directly on the page through basic text formatting functions.

Edit an existing page as follows:

1. Select the page you want to edit from the tree structure in the navigation pane. You can edit the highlighted content areas.
2. Move the mouse pointer over the piece of content you want to edit, and click it. The property names will be displayed on mouse-over, except for the content area.
3. Make your changes. Copy text from other programs and format text, see *Using the rich-text editor*. You can also create a block which is a piece of information, for instance a banner or a news listing, which can be inserted into the page you are editing. Blocks are useful when you want to reuse and share information components on your website. See *Blocks* for more information on how to create blocks.
4. When you are done, click **Done**. Your changes are automatically saved, and a new page version will be created.
5. When you are done, publish the page in any of the ways as described in *Saving and publishing content*. You also have options to undo and redo your changes.

Tip You can see the page settings in on-page editing view when scrolling the mouse wheel.

Content status on the toolbar

When you are editing content in full width, you will see status information in full text on the toolbar as shown in the following examples:

The symbol of the pen means that the content is not available for editing until you cancel the settings, for example, a scheduled publishing.

When the navigation pane and assets pane are pinned, the toolbar shows the following status symbols of the content:

A page or a block that has been published will be in **Published Version** status and no status symbol is shown.

A page or a block that has been set to **Ready to Publish** will be in **Ready to Publish** status.

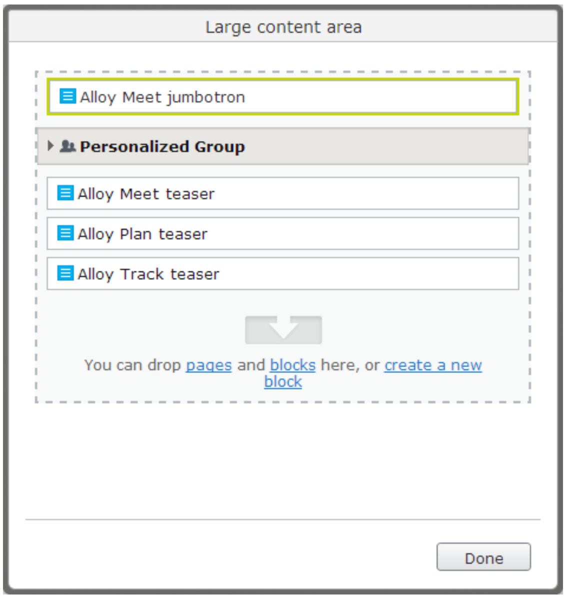
A new page or a block that has not yet been published or set to ready to publish, will be in **Not Ready** status.

A published page or a block that has been changed but not yet published, will be in **Not Ready** status. It could also has been set to **Ready to Publish**, if it was not approved it will be in **Rejected** status.

A page or a block that has been scheduled for publishing:

- New will be in **Published** status
- Changed will be in **Delayed Publish** status

Editing content in the flyout pane



In the flyout pane you can drag pages and blocks and drop them in the content area. You can also *create a new block* and sort the items through drag and drop. Click **Done** and your changes are saved. Pressing Esc closes the pane without your changes were saved.

Editing all properties

Your content can have metadata and other non-visible properties. In the **All Properties** view you can access all these properties for editing. On the EPiServer CMS sample site a set of tabs is already set up for each content type, but this may be different for the templates used on your website. Contact your system administrator to find out what is applicable to your website.

Please refer to the product-specific description about how to edit all properties.

You have the following options:

 **All properties**. Click to access all properties for editing the content. Default is on-page editing view.

 Click to add, for example, a category.

 Click to browse, for example, a form.

 Click to remove, for example, a category.

Previewing

See the different view options as described in *Previewing*.

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Catalogs

A **catalog** consists of products and variants (SKUs) organized into a structure based on product categories or "nodes". Products and variants in the catalog will have associated information such as pricing, markets, inventories, warehouses and assets such as images and documents.

Products can exist in one or more catalogs. Catalogs are independent from one another, and you may create as many catalogs as you need and assign them to one or more websites. Product catalogs are often imported from other integrated systems, but can also be created manually.

The dates that each catalog will be available can also be defined. In this way, future revisions to items and pricing can be easily prepared and reviewed in advance of the release date to the site.

Note that this documentation describes examples from the **sample catalogs** delivered with the EPiServer Commerce sample site. Your installation may look different from what is described here.

Catalog structure

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.

Catalog entries

The catalog is the top-level container for all types of **catalog entries**:

- **Categories** - a grouping of purchasable products, for instance "Art Books" or "Cocktail Dresses".
- **Products** - represent various forms of merchandise that you can display and purchase from the front-end site. A product is used to group variations where you buy one item in the group.
- **Variations/SKUs** - corresponds to a specific type of product with specific characteristics. For example, a "shirt" product will have an individual variation/SKU (Stock Keeping Unit) which includes size, color and sleeve length.
- **Packages and bundles** - groups of variations where you buy all the items in the group:
    - **Packages** - comparable to a SKU because the package item must be purchased as a whole (for instance a computer system). Multiple SKUs make up the package, but it has its own single unique pricing and SKU number. For example, the matching shirt and hat combination is shrink-wrapped together and sold as a single unit. The package has its own SKU number and is displayed as a single line item in the shopping basket.
    - **Bundles** - a collection of variations (SKUs) allowing customers to purchase two or more items at once. All pricing is SKU-specific and separate. 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.

Meta classes and fields

You can define your own **meta classes and meta fields** for both ***products*** and *orders*. 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* **Administration**. For more information, refer to *Catalog meta classes and fields*.

Working with catalogs

Working with catalogs include common tasks such as:

- Creating catalogs through *import/export* or manual *creation of catalog entries*.
- *Categorization and organization* of catalog entries.
- *Browsing* and reviewing catalogs.
- *Editing catalogs* before launching live on your site.
- *Managing pricing* for catalog entries.

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. A product catalog can be generated from an external system and then imported into EPiServer Commerce.

When to import/export

When setting up a new e-commerce site you will of course need to get the products into the system. Importing a product catalog may also be needed when new products have been added to the catalog in an external system. The scenario could also be that you want to move or copy existing product catalogs between websites. *Creating catalogs and adding catalog entries manually* can be done but is most often not an option when dealing with large catalogs.

Import/export methods

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 *CSV catalog import feature*. Here you use an Excel sheet and save the file in the **.csv format**. 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.

Editing products after an import

Depending on the import/export setup, the information for the imported products and their variations may need to be manually edited to be complete. For instance, you may want to add images, documents and associations to other products. This is described in *Editing and publshing catalog entries*.

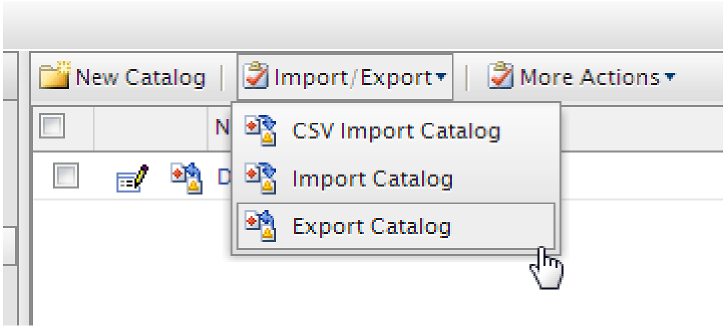
Importing and exporting catalogs

Existing catalog data can be imported or exported to and from EPiServer Commerce 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. Open **Commerce Manager**.
2. Access the **Catalog List** page in the Catalog subsystem. The **Import/Export** menu is located in the upper left corner of the main window.
3. For exporting catalogs, click on the check box for the appropriate catalog nodes.

4. Click on the **Import/Export** pull-down menu to choose either import or export. The corresponding page will appear in the main window.



Exporting catalogs

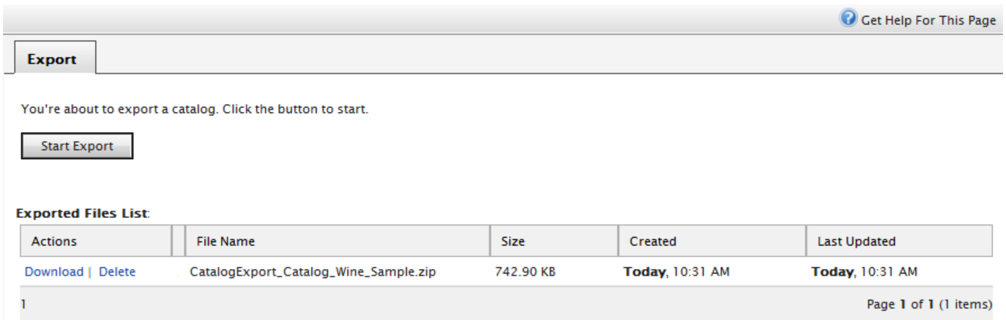
There are two ways to export catalogs in the **Export Catalogs** page.

1. Export everything included in the catalog node that you have 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

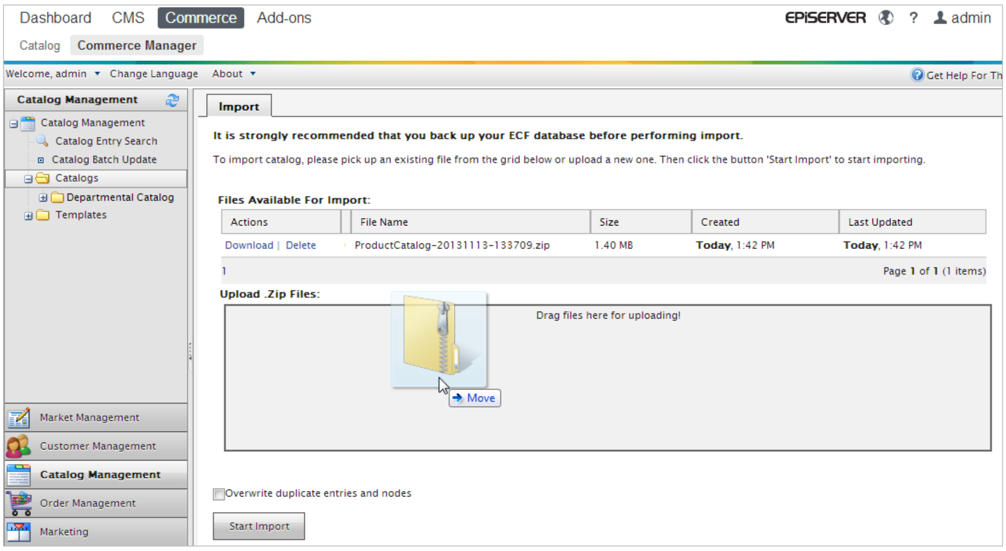
2. Export only the desired files.

- To do this, click on the **Download** links highlighted in blue.



Importing catalogs

1. Add the catalog file to upload for import using drag-and-drop from the source location.
2. The uploaded files will appear in the list of available files for import.
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.



Importing catalogs using CSV files

The CSV catalog import is a feature in EPiServer Commerce 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*, 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 in Commerce Manager) 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 in Commerce Manager, use drag-and-drop to add the files.
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 (for instance a Package and a Product, or a Product and a Variation/SKU).

Format for CSV files

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

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

  Note: Please make sure to specify an appropriate command for each line of the CSV files. Entering "Insert" when that data already exist, or "Update" when no data exist will give an error during import and those line of data will not get successfully imported.
- **Category Code** (by comma): By assigning a category code to an entry, you can specify the category that you want to place your entry in.
  Also please note this rule:
- **SEO URL**: By design, this attribute that is present in both categories and entries must be unique for each item in your catalog. Importing files that contain more than one identical url will result in an error.

Mapping types

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

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

By selecting these options, the Commerce Manager will display different sets of Fields and Attributes for you to manually assign to each data column of your CSV file. Figure11 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.

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

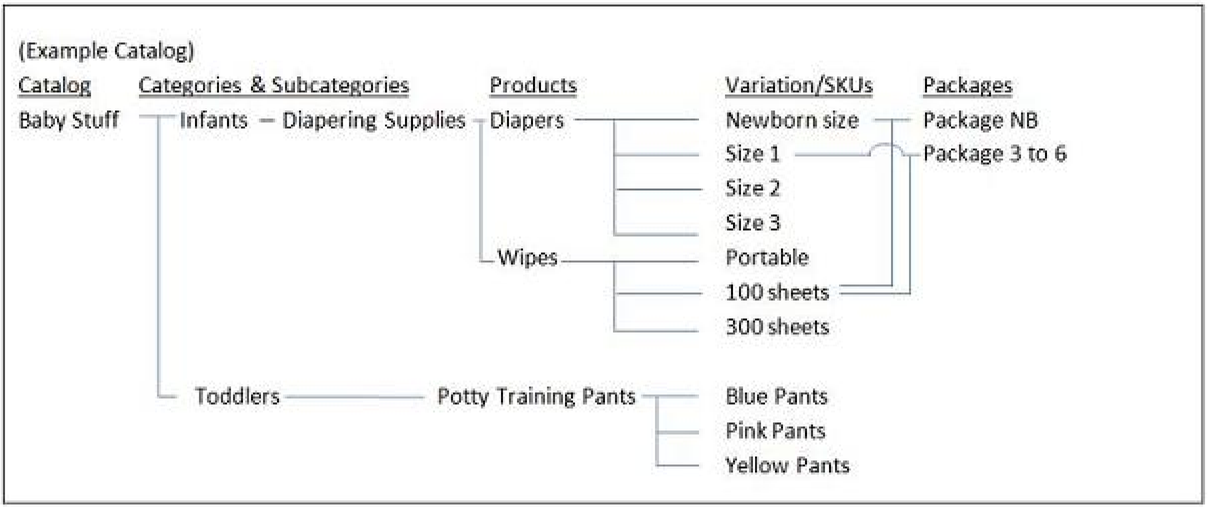


Figure 1

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 check boxes.
  - Click OK to save the new field.
  - Repeat the steps to create all the necessary fields.

- Associate the new meta fields to the meta class you created.

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

- You are done with setting up your meta fields.

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

Follow these steps to prepare the CSV files for import:

- Select Catalog Management.
- 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.

CSV Import Tab

- In the "CSV Import" tab in the main view, add a file to import using drag-and-drop from the source location.
- 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.

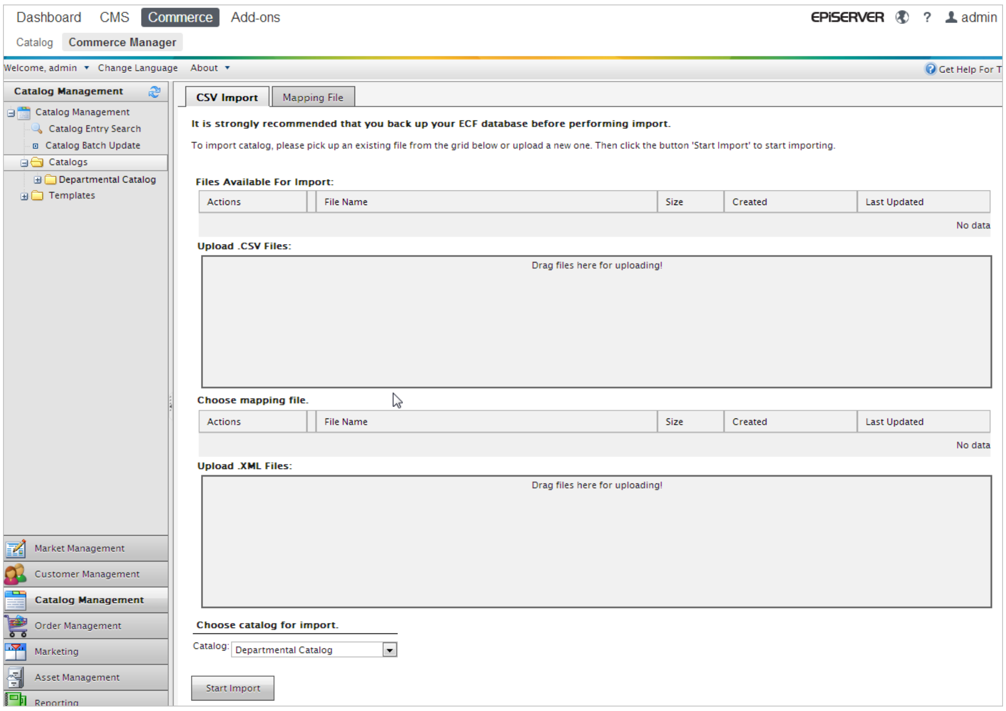


Figure 10

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 below.

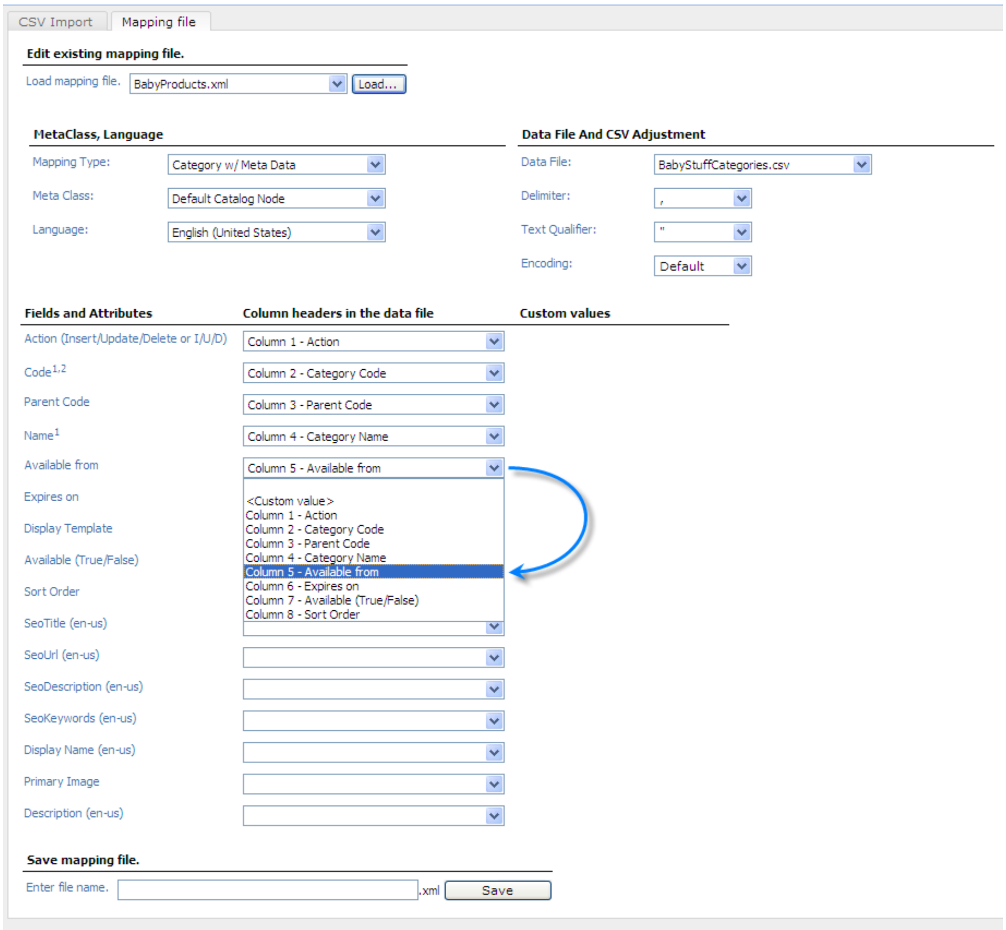


Figure 11

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.

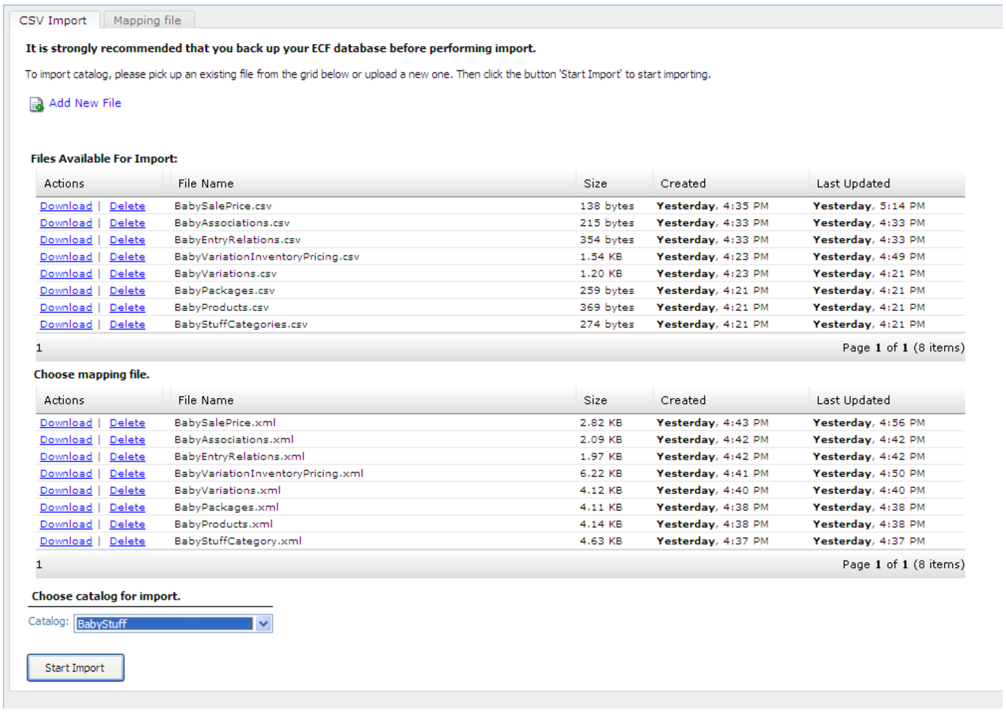
Fields and Attributes, Column headers in the data file, and Selected values section

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.



CSV Import | Mapping file

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

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

Add New File

Files Available For Import:

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

1 Page **1** of **1** (8 items)

Choose mapping file.

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

1 Page **1** of **1** (8 items)

Choose catalog for import.

Catalog: BabyStuff

Start Import

Figure 12

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

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

- Select and highlight the CSV file you wish to import in the "Files available for import" section. For this example, select BabyStuffCategories.csv.
- Select and highlight the mapping file that corresponds to the selected CSV file in the "Choose mapping file for import" section. For this example, select BabyStuffCategories.xml.
- Select the catalog in the "Catalog" drop-down into which you would like to import your CSV data. In this example choose "Baby Stuff".

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

Step 6. Verify your import

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

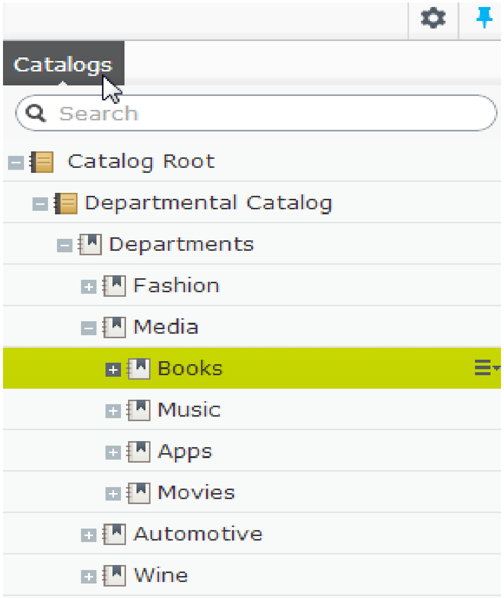
Browsing and searching catalogs

Catalogs and their related products and variants, can be viewed and explored under **Catalog** in the Commerce submenu. You can also **search** for specific catalog entries such as products and variants (SKUs).

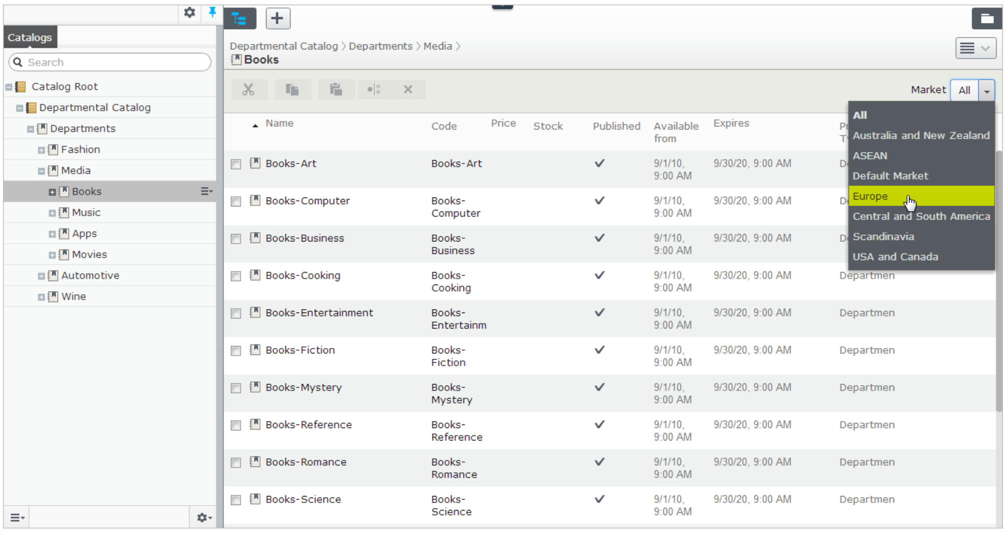
Refer also to the *Search* section for more information on EPiServer search features.

Browsing catalogs

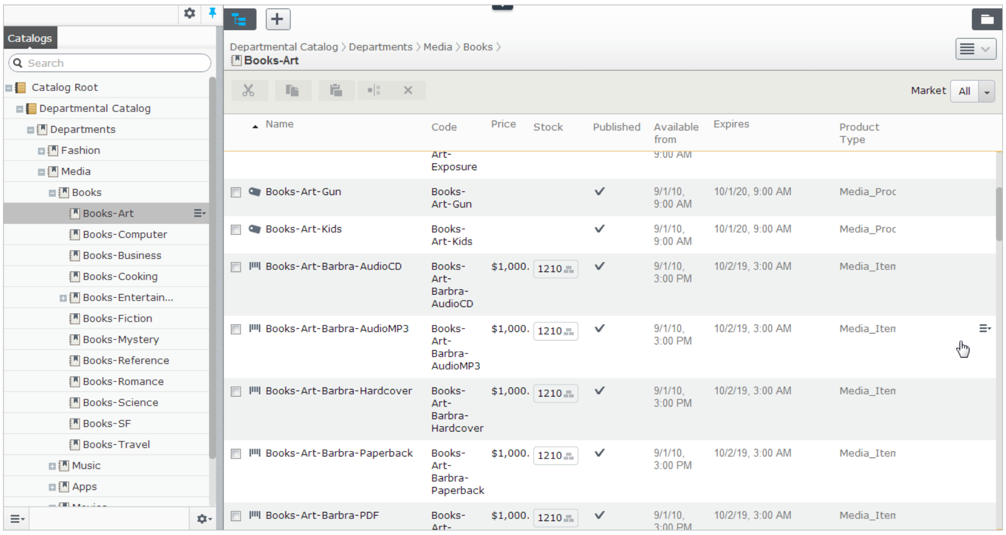
Click on **Catalog** to browse the list of catalogs. In this example, there are multiple catalog nodes with different types of products.



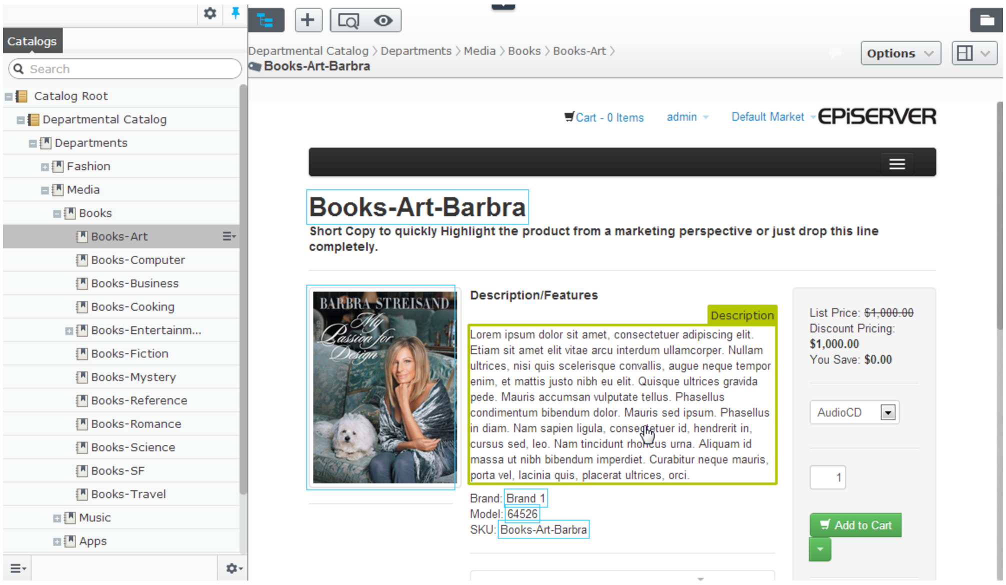
Click on a **catalog node** (category) to expand the underlying subcategories, which will be displayed in the main content area. The listing here displays an overview with the name, code, price, and availability for products and their variants (SKUs). The catalog listing can be filtered per *market* using the **Market** selector at the top.



Click on a catalog node and "drill down" until you see the **products and their variants (SKUs)** in the main listing. On this level you can also see the **stock** availability and **pricing** information.



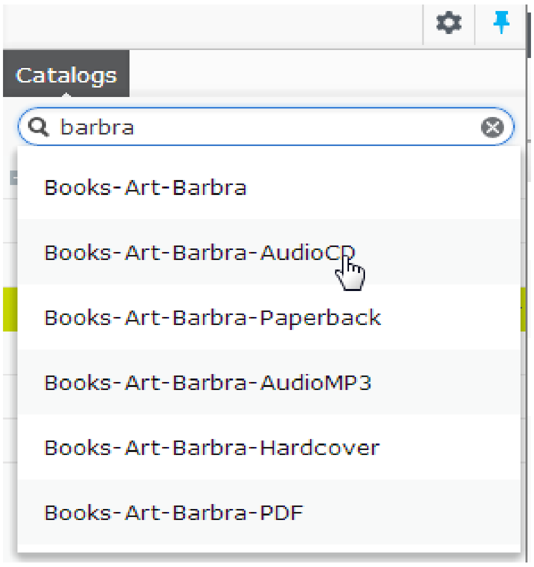
Click on a product/variant to view and edit the content for the item.



For more information on how to edit products and variants, refer to *Editing and publishing catalog entries*.

Searching for catalog entries

To do a basic search for catalog entries from the **Catalogs** view, enter one or more keywords into the search field.



If you enter keywords inside quotation marks ("barbra paperback"), then search will only fetch entries that have those exact keywords. Refer to the *Search* section form more information about search features in EPiServer.

Accessing products in CMS

You can also access entries in the product catalog from the **Edit** view in CMS through *Catalogs* in the **Assets** pane. This is useful when you want to drag-and-drop catalog entries into content areas in CMS pages or blocks. Refer to *Managing content* for more information on how to work with content items.

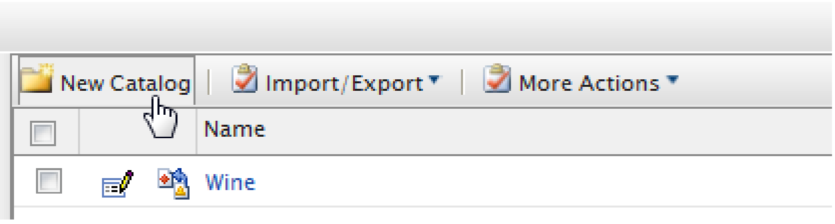
Creating catalogs

The **Catalog List** page in **Commerce Manager**, used for organizing and managing 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*. Product catalogs are often *imported* from other integrated systems, but can also be created manually.

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 languages that should be available apart from the deafult. The options available for selection here are *defined in the CMS administration interface*.
   - **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.

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.

Next steps - adding catalog entries

Refer to *Creating catalog entries* for information on how to add categories, products and variants to the catalog.

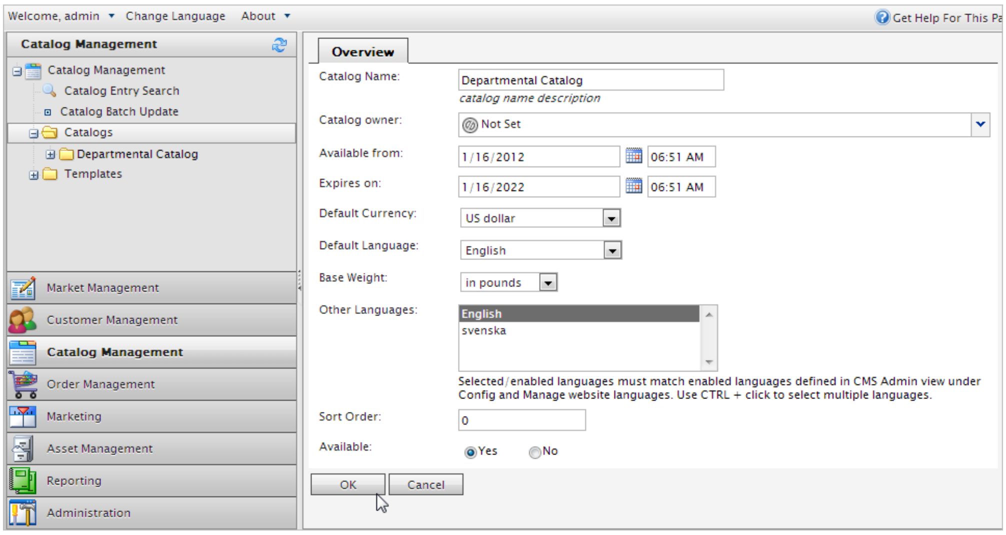
Editing and publishing catalogs

Catalogs can be edited from the **Commerce Manager** administration interface. From here you can edit catalog properties, including addition of new *catalog languages for multilingual content*. From here you can also delete catalogs from the site.

Editing a catalog

Do the following to edit a product catalog:

1. In the **Catalog Management** view, select the desired product catalog in the catalog tree.
2. Select **Edit** in the context menu for the selected catalog.
3. Update the catalog information you want to change, for instance the names or default currency for the catalog. This is also where you *enable languages* to be used for the catalog by selecting one or more (CTRL + click) languages in the **Other Languages** list.



4. Click **OK** when done.

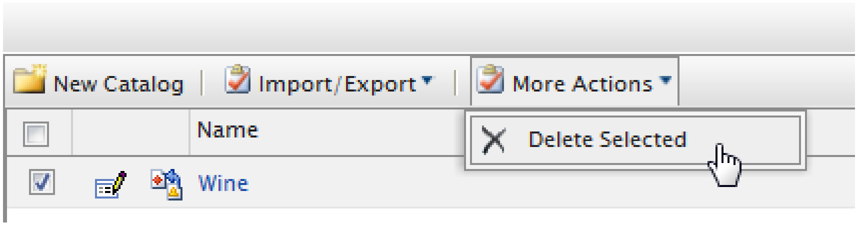
Deleting a catalog

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

Deleting catalogs is done from Commerce Manager. 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.



Creating catalog entries

The **Catalog** interface in EPiServer Commerce provides multiple options for working with catalog data. Marketers may want to create new products and variants, and merchandisers may want to enrich new products that are being added to the e-commerce channels. For e-commerce solutions integrated for instance with an external ERP system, products may already exist with core data and need only to be completed inside EPiServer Commerce. In other scenarios, new products may be created from scratch.

These are common tasks when working with catalog entries:

- Locate "incomplete" products added from integrated systems, add content and media, and then categorize and publish them.
- Create products, add content and media provided from external sources, and then categorize and publish them.
- Adding product code, internal and display name, properties, media and corresponding prices and inventory, to product variants.

When creating catalogs you should carefully consider the catalog structure for maintenance and performance reasons. It is recommended not to build too deep hierarchies of categories, products and variants in your product catalog. However, a flat catalog structure with too many entries in the same category can have a negative impact on performance.

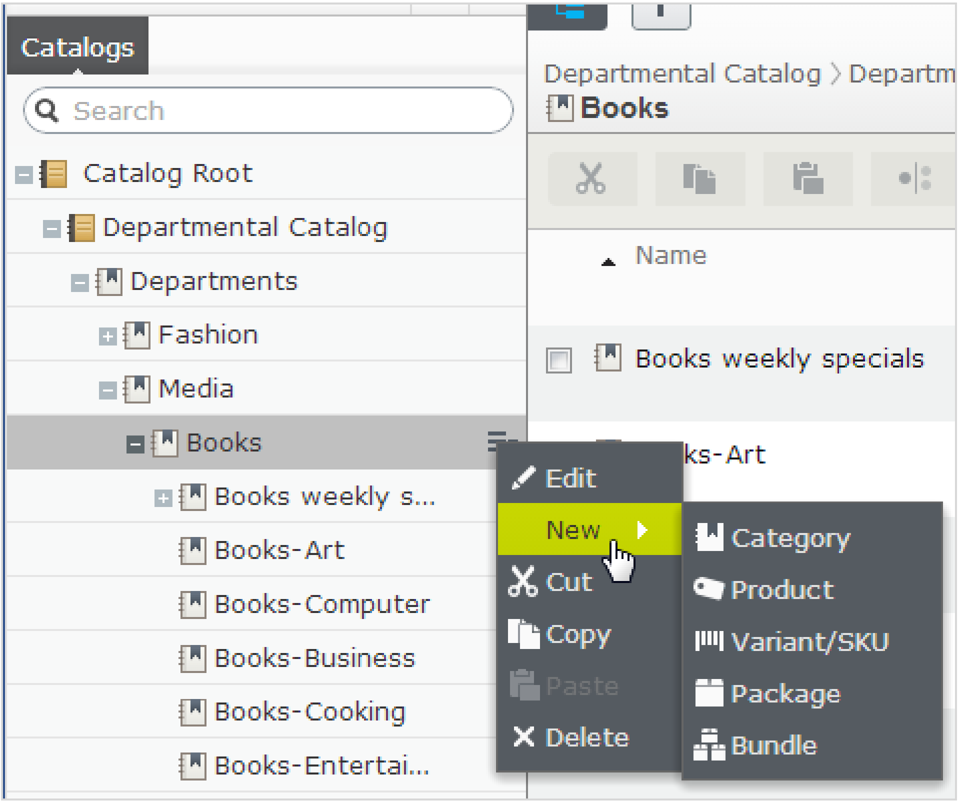
Creating a catalog entry

Catalogs can be *imported into the system*, or *manually created*. Here we assume that you already have an **existing catalog** in your system, and want to add one or more entries to the catalog.

Catalog entries can be of the following types:

- **Product** - various forms of merchandise available for website display and purchasing.
- **Category** - a grouping of purchasable products.
- **Variant or SKU** - a specific type of product with specific characteristics.
- **Package** - contains multiple products or variants, with a single unique pricing for the entire package.
- **Bundle** - a collection of variants with individual pricing, allowing customers to purchase two or more items at once.

New entries can be created either from the **context menus** in the catalog tree or the main listing, or from the **add content button** at the top. When expanding the catalog tree, different options will be available depending on the context in which you attempt to create a new entry.



For instance, selecting a category node allows you to create either a new category, a product or a variant (SKU). When selecting a product, you can create either a new product or a variant (SKU). Since variants belong to the lowest level in the product hierarchy, adding subentries will not be possible for variants, there will only be an edit option. Packages and bundles can only be created under categories.

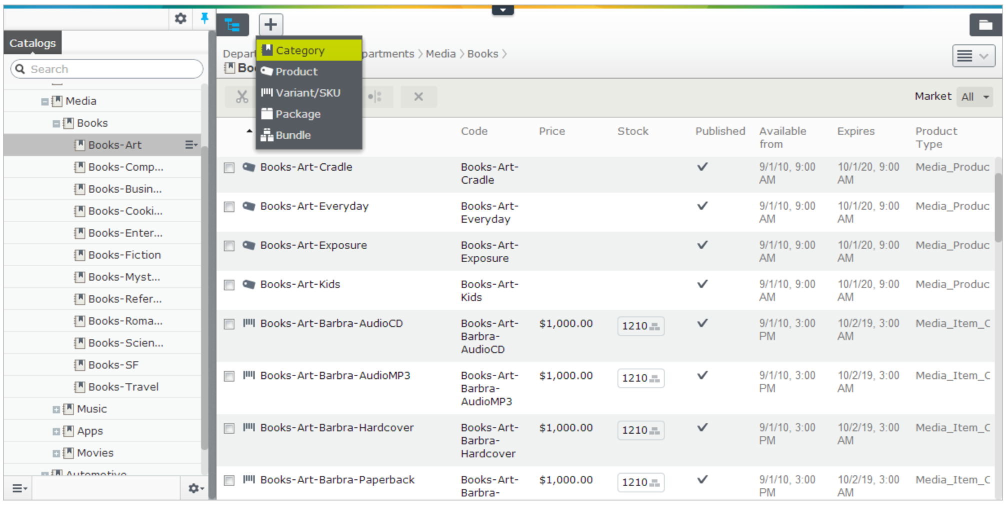
The catalog tree does not display products or variants, only category nodes. Use the main catalog entry listing in the middle to access options for products and variants (SKUs).

Creating a category

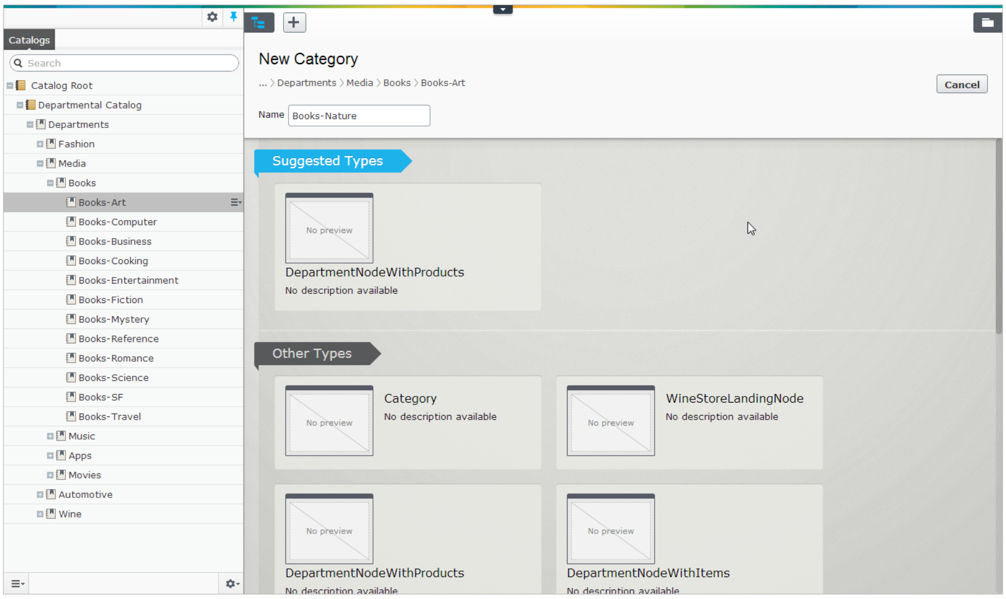
Categories can have their own rich content including assets, for instance descriptions of "wine regions" for a subset of wine products.

1. Expand the *catalog tree or click in the main catalog listing* and navigate to the desired catalog or category node. Or, use the *catalog search feature* to find the product you want to work with.

2. Chose the **New Category** option from the **add** button at the top or in the **context menu** for the item in the listing.



3. Enter a **name** for the category and select the appropriate product category type (meta class). The system will suggest types based on the context and previous similar previous actions.



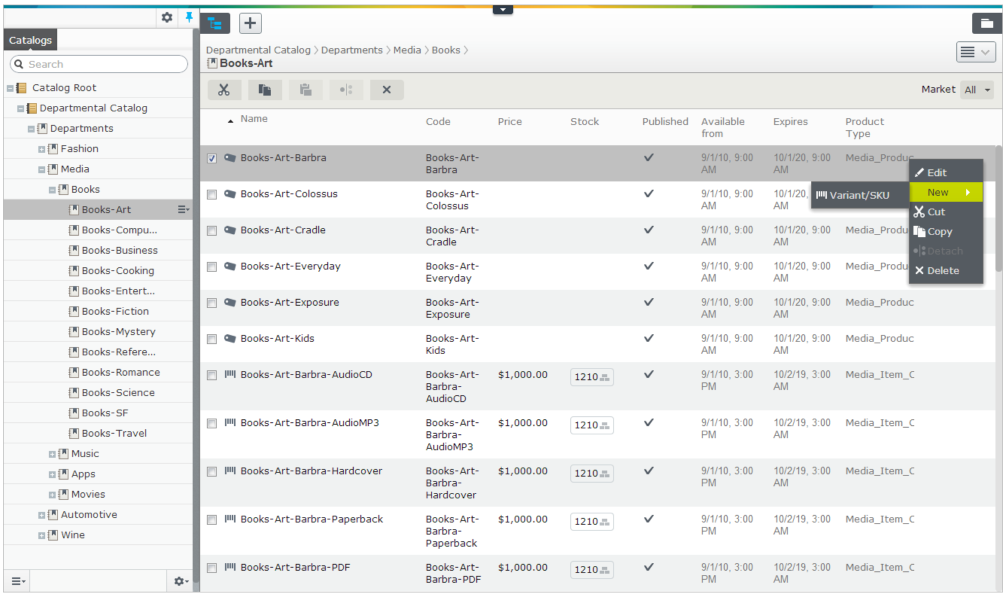
4. Complete the category details as desired. The item will be autosaved by the system, and will not be available on the website until published. Refer to *editing and publishing catalog entries* for more information on how to edit and publish product content.

Creating a variant (SKU)

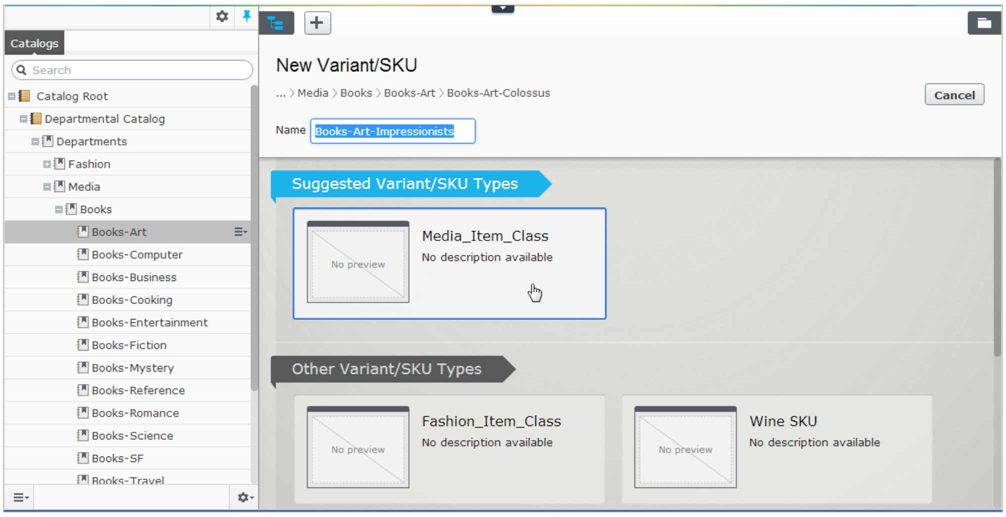
Catalogs may contain only products, both products and variants, or only product variants. In this example we will create a variant (SKU).

1. Expand the *catalog tree or click in the main catalog listing* and navigate to the desired catalog entry (category or product). Or, use *catalog search* to find the product you want to work with.
2. Chose the desired catalog entry to add by selecting it from the **add** button at the top or in the **context menu** for the item in the listing. In this example we will select a product to create a variant of

this.



3. Enter a **name** for the variant and select the appropriate variant type (meta class). The system will suggest types based on the context and previous similar actions.



4. Complete the variant details as desired. The item will be autosaved by the system, and will not be available on the website until published. Refer to *editing and publishing catalog entries* for more information on how to edit and publish product content.

Duplicating catalog entries

Duplication allows you to replicate an existing entry to be used as a start-off for a second one. A duplicated catalog entry will be created with a unique ID. Once created you can edit the item to create a second similar item and also move it to any desired location in the catalog tree. You can duplicate a single catalog entry, or a selection of multiple entries.

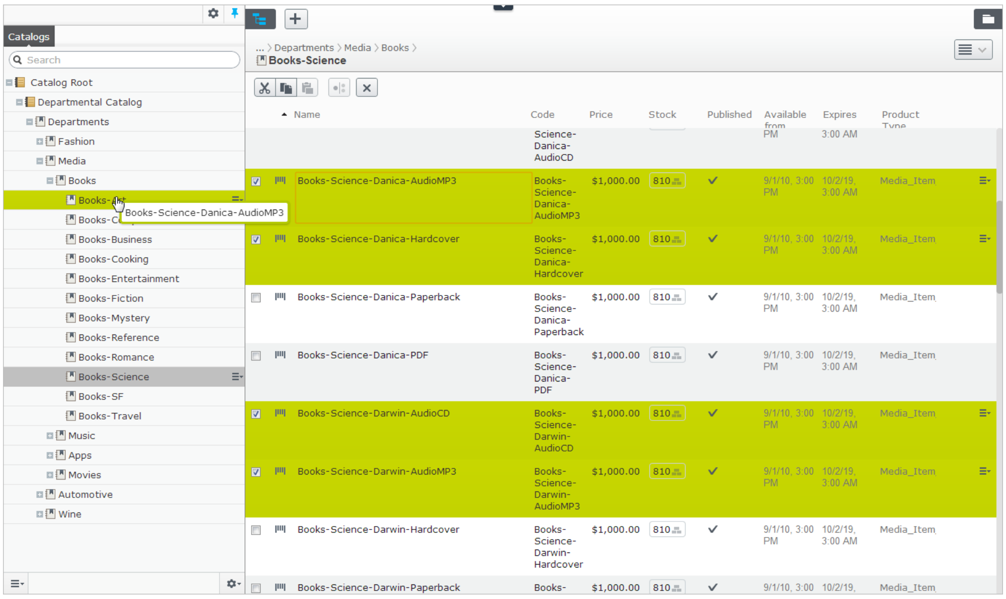
When duplicating catalog entries, the following information will be available:

- **Category** - a new code will be created based on the original, as well as name in URL and SEO URL. Name and internal name will be the same as for the original, and content will be duplicated. Subentries such ans products and variants in the category will not be duplicated.

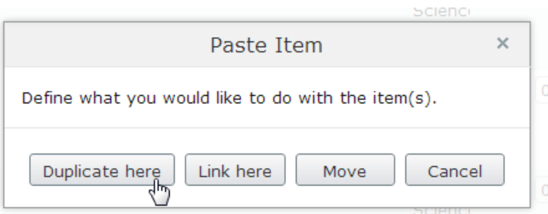
- **Product** - a new URL name, SEO URL and product code will be created based on the original. Name and internal name will be the same as for the original, as well as market availability. Content for the product will be duplicated.
- **Variant (SKU)** - a new URL name, SEO URL and product code will be created based on the original. The internal name will be the same as for the original, as well as market availability. Content for the variant will be duplicated, as well as pricing information.

In this example we will duplicate a selection of multiple variants and add them to another category in the catalog tree.

1. Expand the *catalog tree* and navigate to the desired catalog or category node, so that products and variants are displayed in the main listing.
2. In the list, select the checkboxes for the desired items to be duplicated.
3. Drag your selection to the desired location in the catalog tree.



4. Click **Duplicate here** in the **Paste Item** dialog.



5. The selected catalog entries will be duplicated in the desired location.

You can also use the **Copy/Paste** options in the **list menu** for duplicating multiple entries, or the **Copy/Paste** option in the **Context** menu to duplicate a single catalog entry. Refer to *Product categorization* for more information on how to move and link catalog entries.

See also

Refer to the following sections for information about editing, deleting and categorizing catalog entries:

- *Editing product categories*
- *Editing products and variants (SKUs)*

- *Editing product packages and bundles*
- *Product categorization*

Editing catalog entries

Editing catalog entries involves **adding or changing** content such as SEO information, internal or display name, media or product relations. It also involves **deleting** catalog entries, for instance variants of a product. It is also possible to work with pricing and inventory information, although in many cases this information comes from integration with external systems and may not be possible to update in EPiServer Commerce.

Catalog entries can be of the following types:

- **Category** - a grouping of purchasable products.
- **Product** - various forms of merchandise available for website display and purchasing.
- **Variant or SKU** - a specific type of product with specific characteristics.
- **Package** - contains multiple products or variants, with a single unique pricing for the entire package.
- **Bundle** - a collection of variants with individual pricing, allowing customers to purchase two or more items at once.

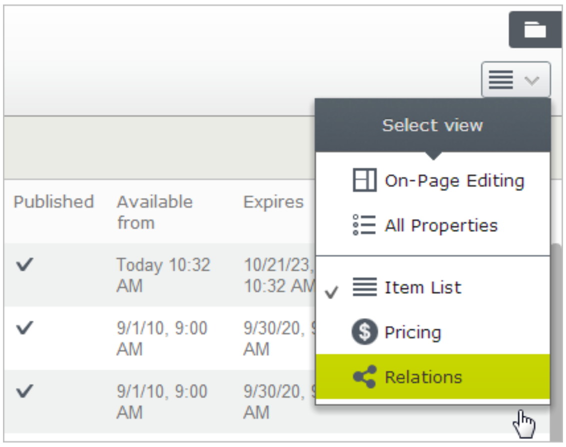
Note that it is possible to edit catalog entries from Commerce Manager. However, doing this will clear any version history for the edited content, and pending drafts and scheduled publishes will be lost.

Editing a catalog entry

Here we assume that you already have **existing catalog entries** which you want to update. Refer to *Creating catalog entries* for information on how to create catalog entries.

Catalog-specific editing options

In Commerce, you will find a view selector with additional options in addition to *All Properties and On-Page Editing*. Using these you can work with items in a **list**, or access the **pricing** and **relations** views for a selected category or product.



Properties

A property is the field where you will enter information, for instance add a product description or a link to an image. The properties that you will see when editing content are both built-in EPiServer properties as well as specific properties for templates on your website. This description refers to properties in a standard installation of the EPiServer Commerce sample site.

Drag-and-drop

Drag-and-drop functionality is frequently used in EPiServer. You can for instance add assets by *dragging items from the* **Media** *gadget* in the **Assets** pane into the **assets area** of a product, or add an image to a product description by dragging the image from the Media gadget into the rich-text editor of a product description.

Saving and publishing

After editing a catalog entry, you can either publish the changes directly, or schedule for later publishing using the *save and publish flow for content* in EPiServer. Note that certain information such as *pricing*, will be immediately published when edited.

Deleting catalog entries

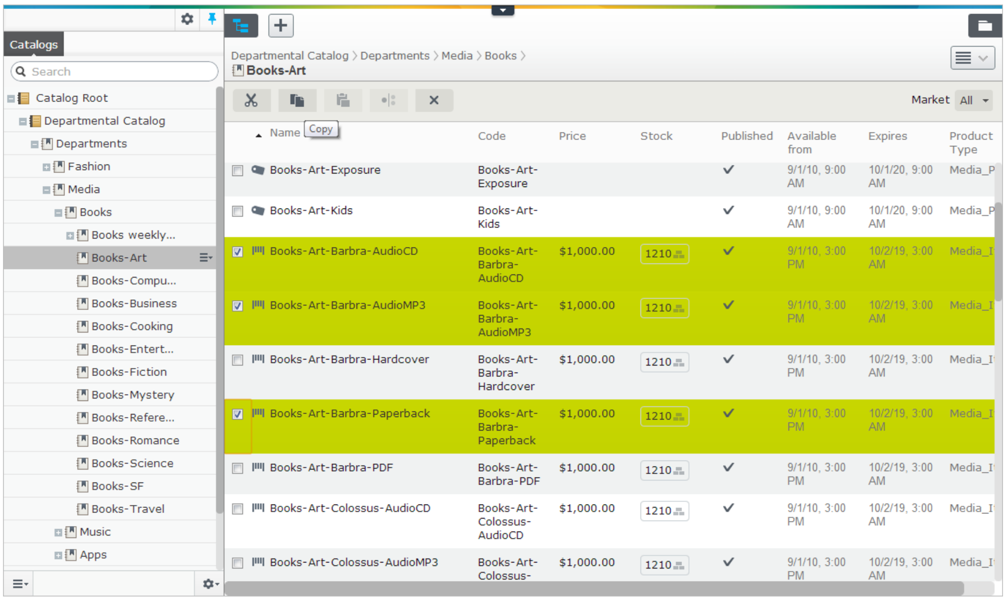
You can delete products and variants, as well as entire product categories and their related products, when maintaining your product catalog. Refer to *Editing product categories*, *Editing products and variants*, and *Editing packages and bundles* for information on how deletion of different types of catalog entries works.

Translating catalog content

Like other types of content such as pages and blocks, catalog entries can exist in multiple languages. Refer to *Translating content* for more information on how to translate different types of content including catalog entries.

Editing multiple catalog entries

When displaying a listing in the item list area, you can work with several catalog entries at the same time by selecting a number of items in the list, and then apply actions such as **cut**, **copy**, **paste**, **detach** and **delete** from the toolbar.



See also

Refer to the following sections for information about editing, deleting, categorization and translation of catalog entries:

- *Editing product categories*
- *Editing products and variants (SKUs)*
- *Editing packages and bundles*
- *Product categorization*
- *Translating content*

Editing categories

As a merchandiser you may want to review and update your category structure and the content saved for a category. Category content can easily be updated, previewed and saved and published. You can delete a category and the system will completely remove all links and leave other category links intact.

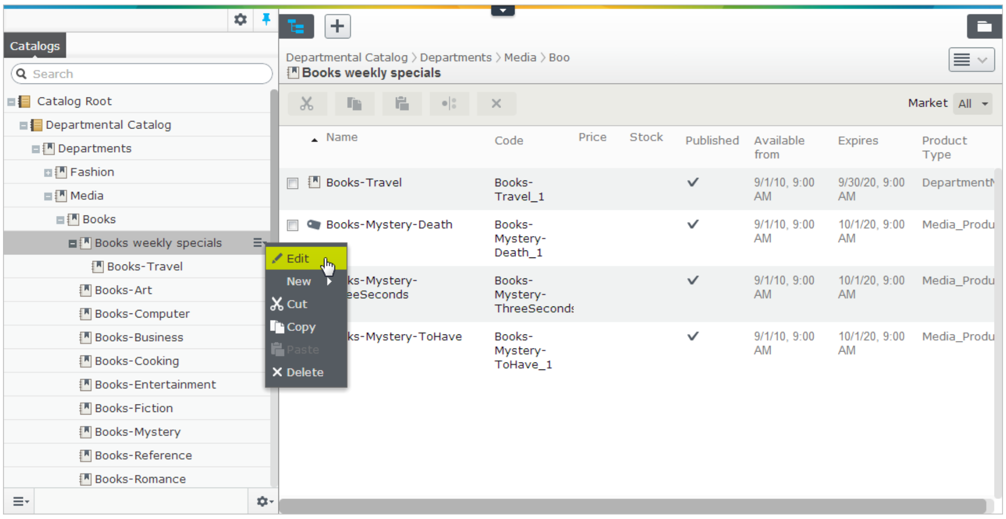
Here we assume that you already have an *existing product catalog with categories* in your system, and want to update the existing category information, or delete the category entirely.

Refer to *Editing products and variants* for more detailed information about editable properties.

Editing a category

Do the following to edit a product category:

1. In the **Catalog** view, select the desired product category in the catalog tree.
2. Select **Edit** in the context menu for the selected category.



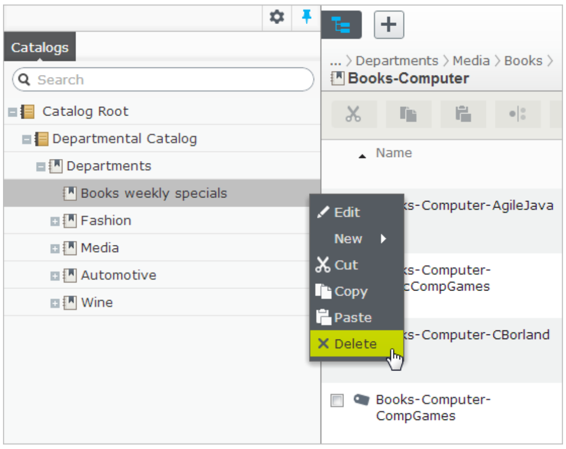
3. Update the category information you want to change, for instance the name or SEO information, or the category description.
4. After editing the category information, you can either publish the changes directly, or schedule for later publishing using the *save and publish flow for content* in EPiServer.

Deleting a category

When deleting a **category** the following will happen depending on how the category is linked to other catalog entries:

- If the category is linked to catalog entries that are also linked to other categories, then all links to the deleted category will be completely removed, and the other category links will be left intact.
- If there are categories, products and variants that are linked **only** to the category to be deleted, these entries will be deleted as well.

To delete a category, select the category in the catalog tree, select **Delete** from the context menu, and click **Delete** to confirm the deletion. You can also select **Delete** from the context menu for the category in the item listing.



To delete multiple catalog entries at the same time, select the entries in the item list and click the **Delete** button in the menu.

Be aware that deletion of catalog entries cannot be undone. Also, when deleting a category with many subitems, the deletion may take some time before it is completed.

Editing products and variants

Editing of products and variants is typically done when you want to add information to existing (incomplete) entries that have been *imported to the system*, or want to add one or more entries manually. You can also delete a product or a variant. Furthermore, you can create relations between catalog entries by adding them in multiple categories, or by associating items with each other for instance for cross-selling purposes.

In the sample site. the editable properties for products and variants are almost the same. The only difference is that if you have both products and variants in your system, pricing and inventory options will not be available for products since these are normally defined on variant (SKU) level. For products you will also see a tab displaying variants (SKUs) related to the product. *Categories* also have some of the properties described here.

Note that changes to **relations** and **pricing** will be **immediately** published and visible on the website, and is **not** included in the publishing flow for the rest of the content. Changes to **content** and **assets** need to be **published** to be visible on the website. Refer to *Saving and publishing content* for more information on how autosave, saving and publishing works.

Product and variant (SKU) properties

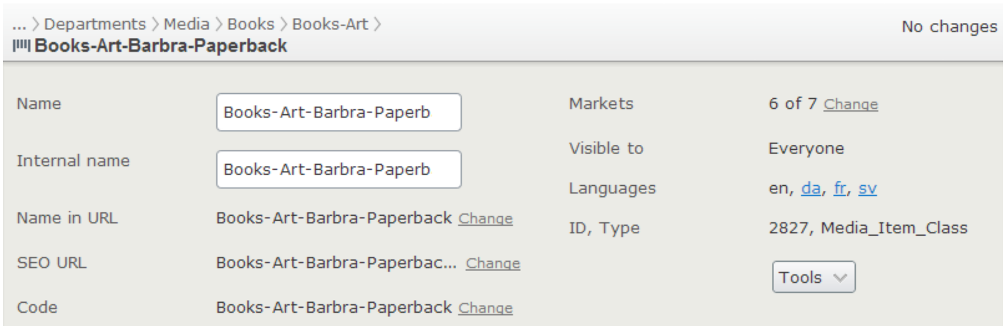
This section describes properties in the EPiServer Commerce sample templates, as they appear when *editing them from the* All Properties *view*. Some of the properties in a template are default, and some are template-specific for the website. The **Settings** tab is a default tab in EPiServer containing a set of built-in date related properties which you rarely need to change.

Header

The header area provides an overview of information associated with categories, products and variants. Much of this is created automatically and will rarely need to be changed, unless you are *manually* *creating catalog entries*.

At the very top you can see the structure path (clickable) for the entry, together with the type of entry and its name.

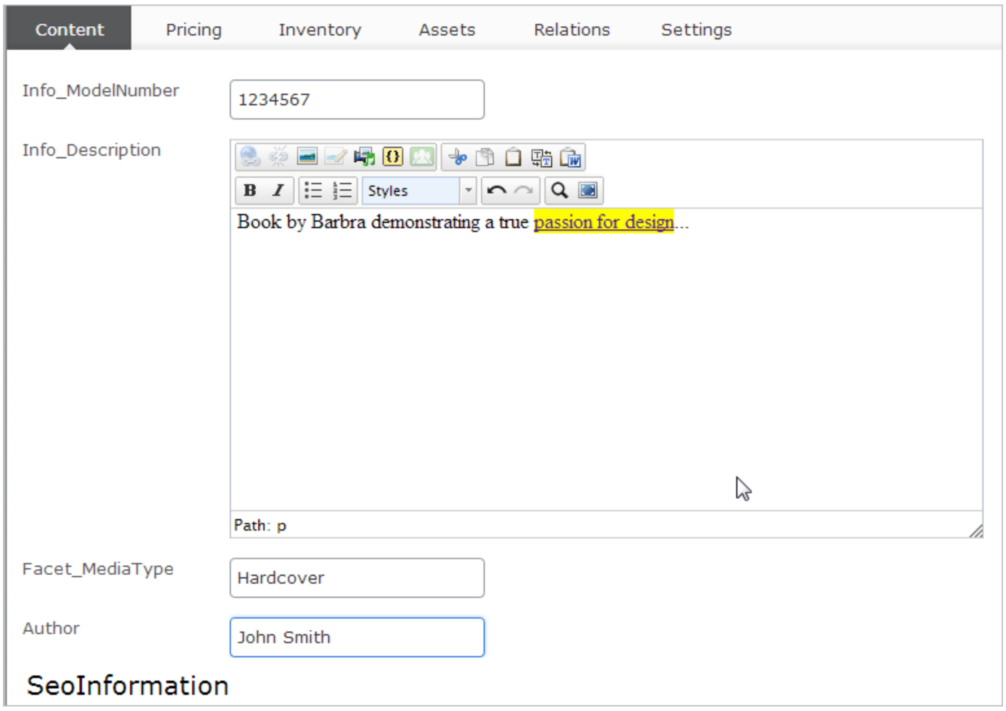
- **Display name** - will be displayed externally as the main title for the product/variant on the content display page.
- **Name** - name used internally in Edit view when working with the item. This is also the name that you provide when creating a new catalog entry, and the name you will see in catalog listings.
- **Name in URL** - URL automatically created based on name and place in the navigation, depends on the implementation if this is visible in links on the site.
- **SEO URL** - created automatically and based on the internal name first provided, depends on the implementation if this is visible in links on the site.
- **Code** - the product code/identification key, most often provided by an external system but can be updated here.
- **Markets** - for changing market availability, by default a product/variant is available in all markets when created.
- **Visible to** - by default catalog content will be publicly visible and editable for users within the *CommerceAdmins group*.
- **Languages** - shows available languages for the content (with the active language not underlined).
- **ID, Type** - shows the ID set by the system and the type of content upon which the product or variant is based.



Content

The **Content** tab holds most of the information for the product/variant. The properties here are specific for the implementation and will vary depending on the product/variant type (meta class) upon which the product/variant is based. For a "book" type of product/variant, the fields can be for example "media type" and "author".

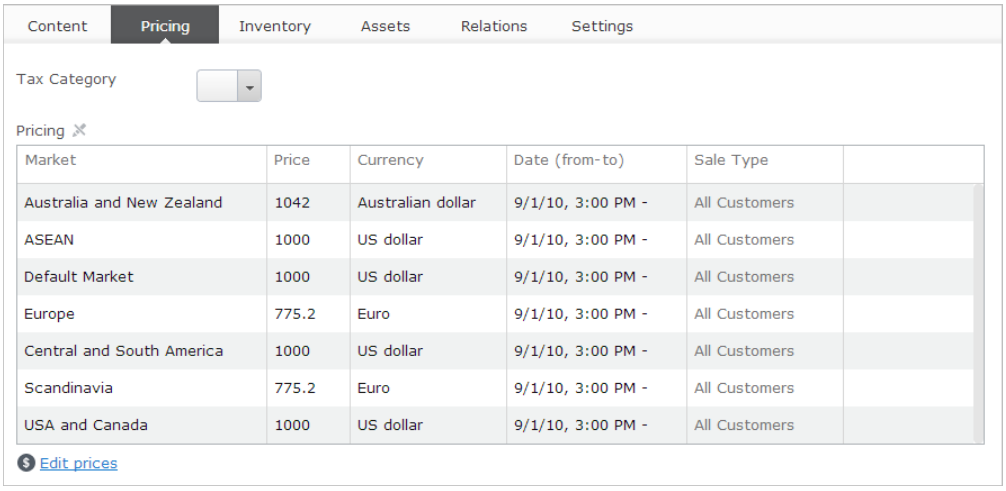
The description is often a *rich-text editor* where you can add for example formatted text, images and links.



Pricing

The **Pricing** tab offers an overview of prices for the selected variant (SKU). The **Tax Category** can be set here, allowing you to associate a variant with different taxes depending on product type, for instance "luxury items" or VAT for different regions. *Tax categories* are defined in the administration interface in Commerce Manager, and will be available for selection here.

Clicking **Edit prices** will take you to the view for managing pricing, where you can efficiently compare prices between products and markets when editing them.



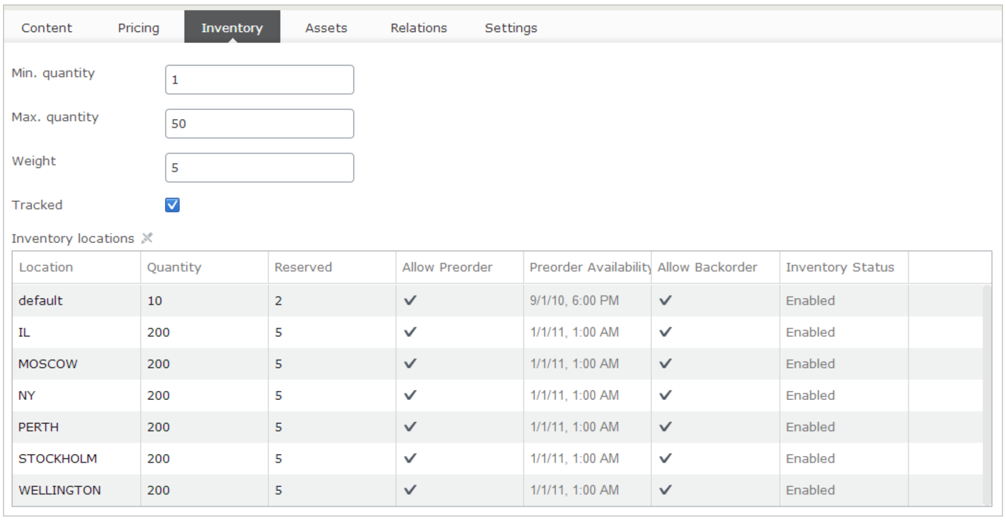
Refer to *Managing prices* for information on how to add and edit prices for variants (SKUs).

Inventory

Most often the information on the **Inventory** tab is retrieved through the integration with external systems, in which case it will rarely need to be changed from here, or may not be possible at all to edit. On the sample site, some properties can be edited here, whereas the information related to **Inventory Locations** is for viewing only.

The following properties can be edited for a variant:

- **Max. Quantity** - the maximum number of items that can be purchased at one time.
- **Min. Quantity** - the minimum quantity that can be purchased from the variant page.
- **Tracked** - if selected for the variant, you will be unable to complete orders unless you provide inventory information (see Inventory Location, below). If Tracked is not selected you can place orders without providing inventory amounts
- **Weight** - the weight entered here will affect the shipping cost based on the *shipping configuration*.



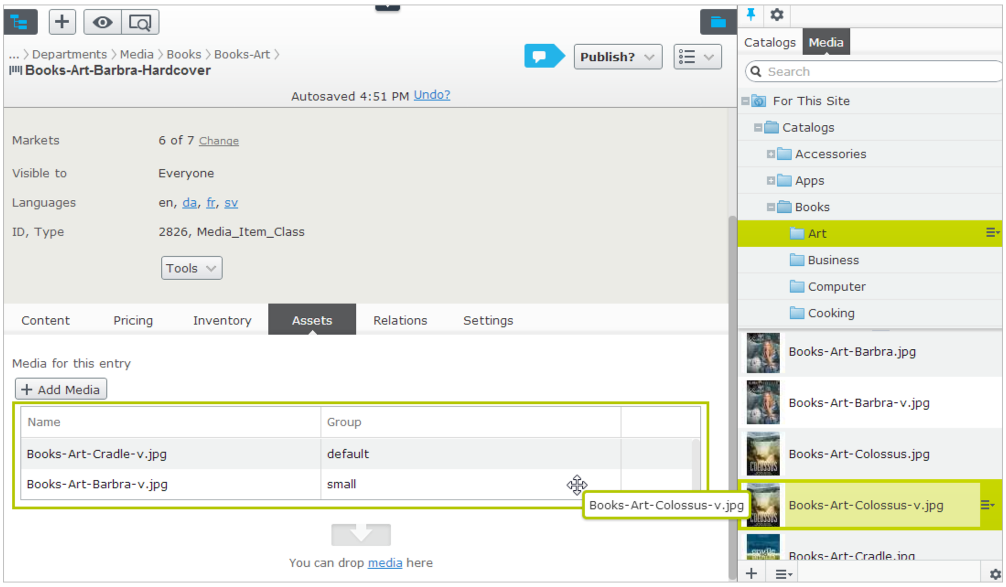
Location	Quantity	Reserved	Allow Preorder	Preorder Availability	Allow Backorder	Inventory Status
default	10	2	✓	9/1/10, 6:00 PM	✓	Enabled
IL	200	5	✓	1/1/11, 1:00 AM	✓	Enabled
MOSCOW	200	5	✓	1/1/11, 1:00 AM	✓	Enabled
NY	200	5	✓	1/1/11, 1:00 AM	✓	Enabled
PERTH	200	5	✓	1/1/11, 1:00 AM	✓	Enabled
STOCKHOLM	200	5	✓	1/1/11, 1:00 AM	✓	Enabled
WELLINGTON	200	5	✓	1/1/11, 1:00 AM	✓	Enabled

Inventory location displays the information as described below.

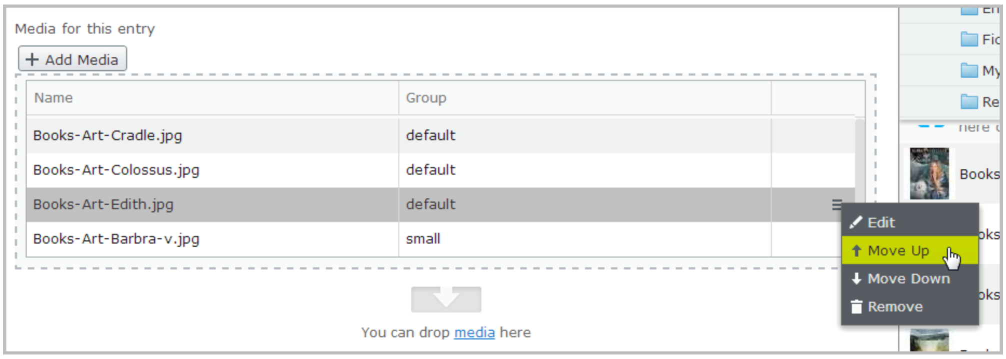
- **Location** - the physical stock location of the inventory, as defined in the *warehouse settings*.
- **Quantity** - total available quantity for a specific location.
- **Reserved** - define a quantity allowing you to reserve a specified number of inventory "In Stock", and prevent them from being used. If for instance you set the In Stock = 10 and Reserved = 5, then the In Stock count will not go below 5.
- **Allow backorder/preorder** - if selected, backorders/preorders will be allowed.
- **Backorder/preorder availability** - when either of the two are turned on and a quantity is specified, 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 quantity 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.
- **Inventory status** - this value can be set to "Enabled", "Disabled" or "Ignored". If this is *enabled*, the number of units of a product being purchased cannot exceed the inventory value. This means that the check out procedure cannot be completed if the number in the inventory is exceeded. Instead, the quantity you can purchase will default to the actual number of remaining units.
If **Tracked** for a product variant is selected, and **Inventory Status** is set to *Disabled/Ignored*, then the available quantity will be monitored, but the number of units that can be checked out will not be limited. 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. The inventory status for a particular warehouse is generally considered more important than the tracking flag on the variant itself.

Assets

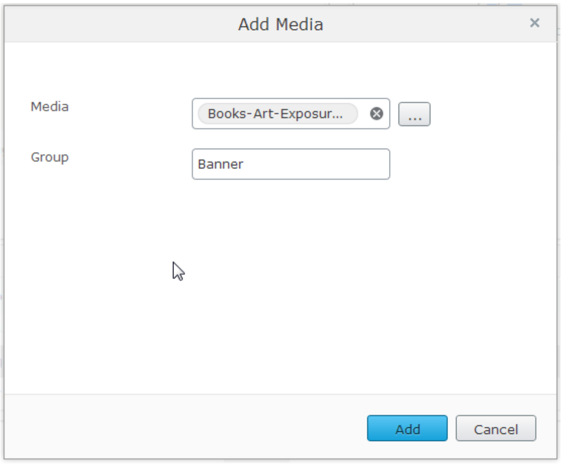
The **Assets** tab is where you will link media files to a catalog entry. A media file can be one or more images, or one or more document in for example PDF format. Add media files of your choice by dragging items from **Media** in the Assets pane into the assets area of the catalog entry.



You can also use the **Add Media** button to add asset items. Using the move up/down options in the context menu for an item, you can rearrange the order of items in the list. On the sample site, the item at the top of the list will be the one used for the main display.

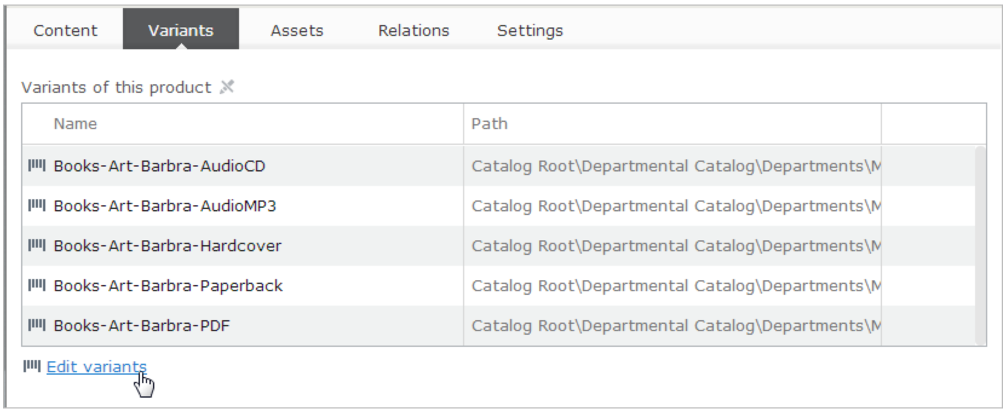


When uploading media items, you can also sort them into groups, for instance "Banner".

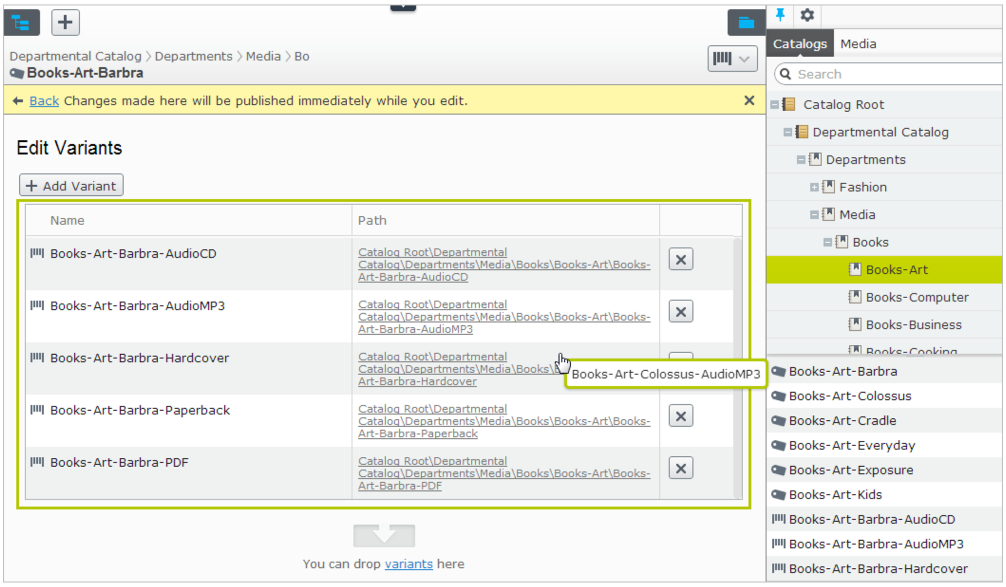


Variants

The **Variants** tab is only visible for products and provides an overview of variants for a product. Click **Edit variants** to add or remove variants for the product.



From this view you can **add** variants for the product either by dragging them from **Entries** in the Assets pane, or through the **Add Variant** button. To remove a link to a variant, click the **Remove** button for the variant in the item list. When done, click **Back** in the upper notification bar to return the product you were working with.

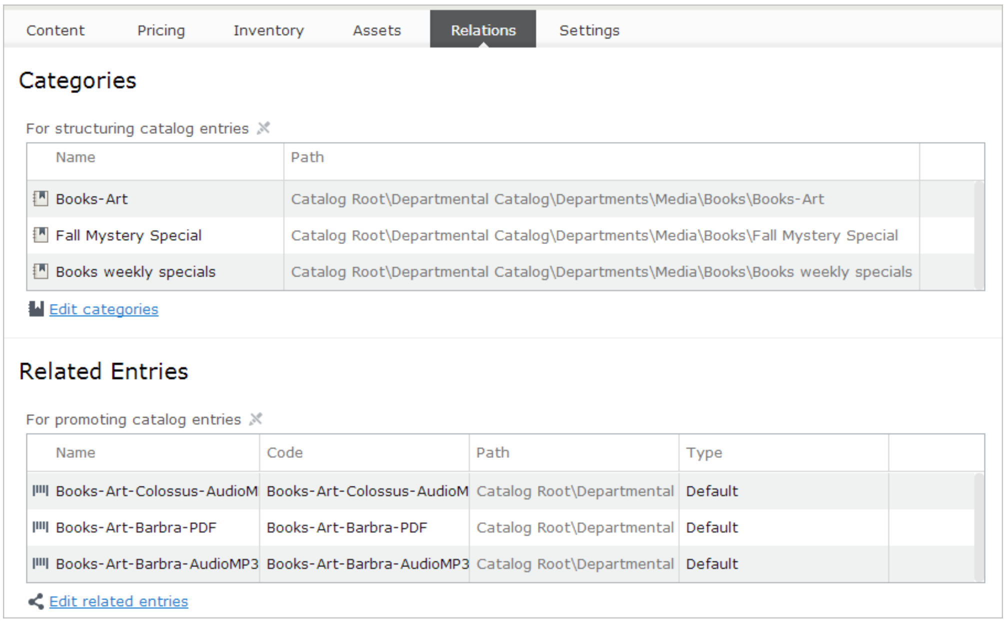


Relations

The **Relations** tab provides an overview of how a product or variant relates to other products and variants, as well as all the different categories where a product or variant will occur. Relations can be used to promote new, popular, or sale products by displaying them as featured products in category and search result pages.

A product can for instance appear in the "French Market" category, as well as under "Weekly Specials" and "Mixed Cases". These type of relations are displayed in the **Categories** section. You can also display top selling products in your store, as well as create up-selling/cross-selling items like "Product Accessories" or "You May Also Like" type of displays. These types of relations are displayed in the **Related Entries** section.

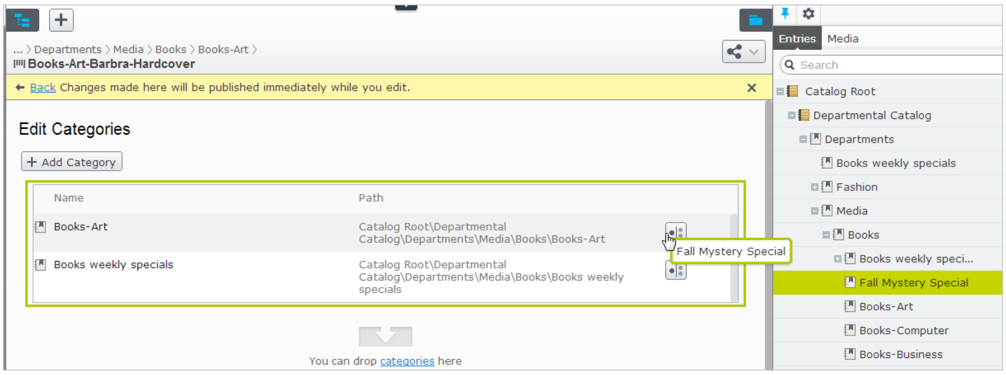
Click **Edit categories** or **Edit related entries** to edit relations.



Editing category relations

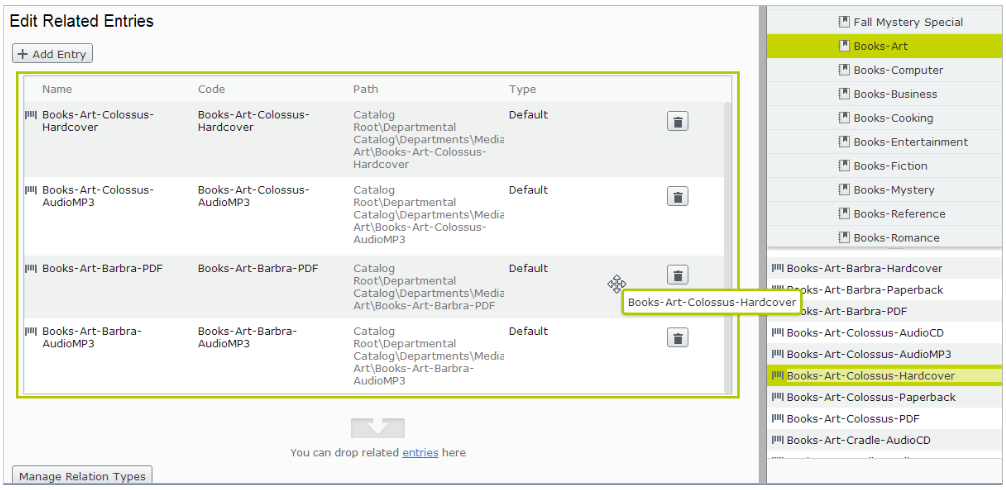
From **Edit Categories** you can create category relations either by dragging categories from **Entries** in the Assets pane, or through the **Add Category** button. To remove a category relation, click the **Detach** button for the category in the item list. When done, click **Back** in the upper notification bar to return the catalog entry you were working with.

> The top category is always the "home" location of products, meaning that the product is located here and linked to other categories. When you edit a product, the selection in the catalog tree will jump to the home category. If URLs based on the "Name in URL" property are used, the URL will automatically be based on the path from the **home** category. This is important for instance if you move another category to become the top location, then products will be moved and their URLs will change accordingly.



Editing related entries

From **Edit Related Entries** you can create entry relations either by dragging entries from **Entries** in the Assets pane, or through the **Add Entry** button. You can also **Edit**, **Duplicate** or **Delete** a related entry by selecting these options in the context menu for the item.



You can have different relation entry types available for selection when editing. These are implementation specific and cannot be changed from here. If these are available you can click an entry in the list and select the desired related entry type.

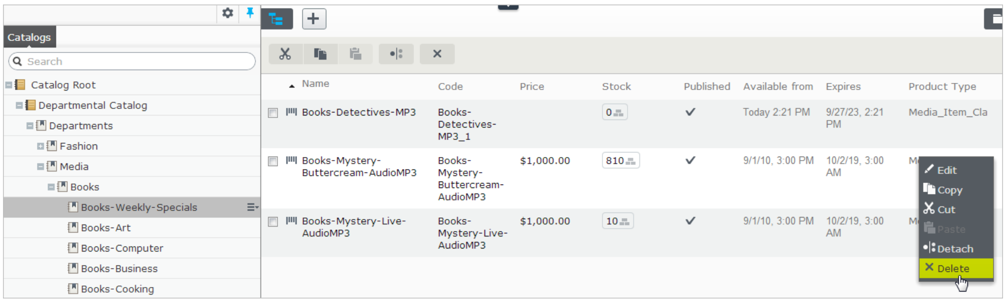
When done editing relations, click **Back** in the upper notification bar to return the catalog entry you were working with.

Deleting a product or variant (SKU)

When deleting a **product or a variant (SKU)** the following will happen depending on how the entry you want to delete is related to other catalog entries:

- If a product is deleted, all links from other catalog entries to the product will be removed.
- If a product with associated variants is deleted, the variants will be left associated with the same category as the deleted product.
- If a variant is deleted, all links from other catalog entries to the variant will be removed.

To delete a product or variant, select **Delete** from the context menu for the item in the item list, and click **Delete** to confirm the deletion.



To delete multiple catalog entries at the same time, select the entries in the item list and click the **Delete** button in the toolbar.

Be aware that deletion of catalog entries cannot be undone.

Use the **Detach** option in the toolbar to remove a **link** between catalog entries. Linking is used when you want a catalog entry to appear in multiple categories, or when cross-selling related items. Refer to *product categorization* for more information on how to manage catalog entry links.

Editing packages and bundles

A product **package** contains multiple products or variants, with a **single unique pricing** for the entire package, whereas a product **bundle** is a collection of variants with individual pricing, allowing customers to purchase two or more items at once. The editing of packages and bundles are similar to the *editing of products and variants*, except in that the properties available for editing will be somewhat different.

Here we assume that you already have existing product packages and bundles that you want to update in your system. Refer to *Creating catalog entries* for information on how to create packages and bundles.

Editing a package or bundle

This section describes properties in the EPiServer Commerce sample templates, as they appear when *editing them from the* All Properties *view*. Some of the properties in a template are default, and some are template-specific for the website. The **Settings** tab is a default tab in EPiServer containing a set of built-in date related properties which you rarely need to change.

Here we will discuss the usage of tabs and properties for packages and bundles. Refer to *Editing products and variants* for more information on tabs and properties that are available for both products, variants, packages and bundles.

Pricing

Since unique pricing can be set only for packages and not bundles, the **Pricing** tab is only available for **packages** and will provide an overview of the pricing for that particular package, for your different markets and customer groups. Click **Edit prices** to compare and edit the price for the package, refer to *Managing pricing* for more information on how to edit prices.

Inventory

A package is a physical assembly of a set of products or variants (SKUs), and will therefore also have inventory information attached, which a bundles will not have. The **Inventory** tab for packages provides an overview of inventory status information, which is often retrieved from external systems. Refer to *Editing products and variants* for more information on how to work with inventory information.

Assets

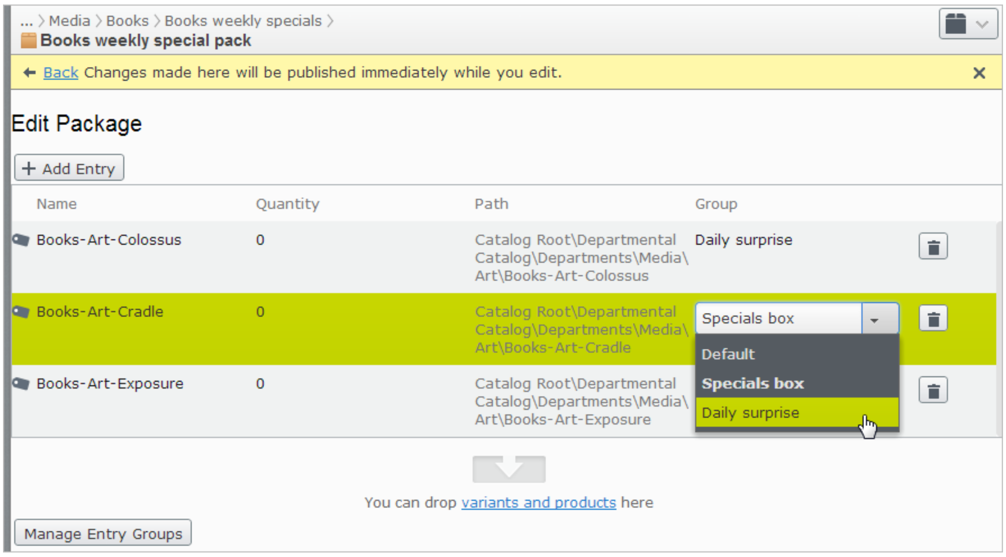
Just like products and variants (SKUs), packages and bundles can have associated assets such as images and documents. Add media files of your choice by dragging items from the right-hand **Assets** pane into the assets area of the package or bundle, or use the **Add** button. Refer to *Assets* for more information on how to work with assets.

Relations

Packages and bundles can also have relations to other categories in the catalog tree, or products or variants. The **Relations** tab provides an overview of the existing relations for the package or bundle. Click **Edit categories** or **Edit related items** to edit the information. Refer to *Editing products and variants* for more information on how to edit relations.

Package entries

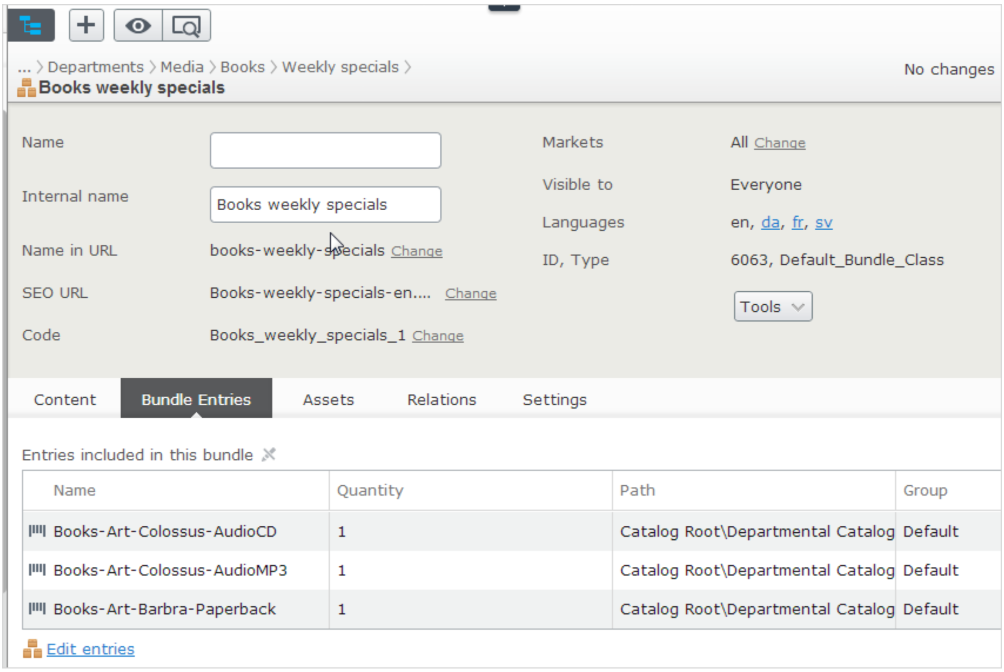
The **Package Entries** tab provides an overview of entries included in the package. Click **Edit entries** to edit the information. Add catalog entries to the package, either by dragging them from **Entries** in the Assets pane, or by using the **Add Entry** button. Click the **Manage Entry Groups** button to add package **groups** to associate packages with. The same groups will be available for bundles.



When done, click **Back** in the upper notification bar to return the package you were working with.

Bundle entries

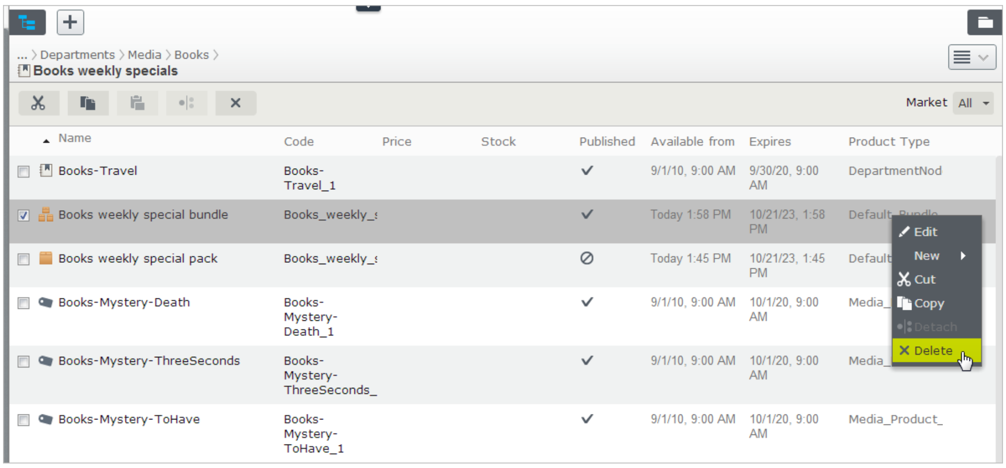
The **Bundle Entries** tab provides an overview of entries included in the bundle. Click **Edit entries** to edit the information. Add catalog entries to the bundle, either by dragging them from **Entries** in the Assets pane, or by using the **Add Entry** button. Bundle entries can be associated with the groups as created for packages above.



Deleting a package or bundle

When deleting a package or bundle, the item will be deleted and all links from related products and variants to the current package or bundle will be removed.

To delete a package or bundle, select **Delete** from the context menu for the item in the item listing, and click **Delete** to confirm the deletion.



To delete multiple catalog entries at the same time, select the entries in the item list and click the **Delete** button in the toolbar.

Be aware that deletion of catalog entries cannot be undone.

Product categorization

Using product **categorization** you can work with your product catalog to adjust the structure and range in order to optimize the selling potential of products. You can search for products or a collection of products, and assign these to different categories through the creation of **relations**. You can also copy or move a product or collection of products between categories, or detach a product from a category. The **Relations** tab provides an overview of relations for a catalog entry.

> When creating catalogs you should carefully consider the catalog structure for maintenance and performance reasons. It is recommended not to build too deep hierarchies of categories, products and variants in your product catalog. However, a flat catalog structure with too many entries in the same category can have a negative impact on performance.

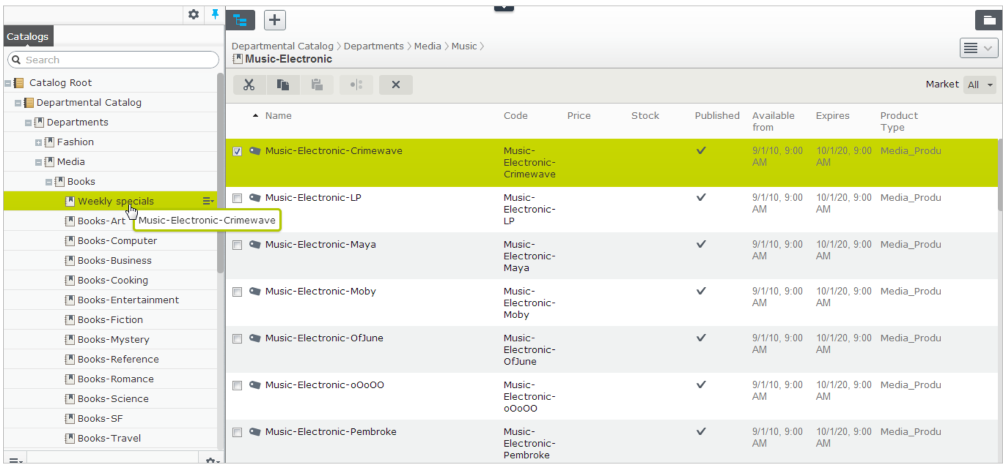
Categorization involves the following tasks:

- **Moving** allows you to control the structure of your catalog after *entries are created*, by moving them to another location in the hierarchy. When moving a category or product to a new location in the catalog tree, the related products and variants will also be moved, and any existing links to other catalog entries will be kept intact.
- **Linking** allows you to create relation links between entries in the catalog hierarchy. For example, you can create a category called "Featured Products", and link a product in the "Sport Shoes" category to this to this, without having to duplicate any entries. The item will be visible in both categories, and can be updated from any of these locations.
- **Detaching** allows you to remove a relation link from a product or a variant to a category, for instance for a product that appears in two categories "Sport Shoes" and "Featured Products".

Moving catalog entries

In the example below we will move a product to a new location, but the procedure is similar for moving a category or a variant.

1. In the **Catalog** view, select the desired product in the main listing.
2. Drag the product into the desired location in the catalog tree to the left.



3. Click **Move** in the **Paste Item** dialog.

You can also use the **Copy/Paste** option in the context menu to move catalog entries.

Linking catalog entries

In the example below we will create a relation link from a **product** in one category to another category, but the procedure is similar for the linking of a variant.

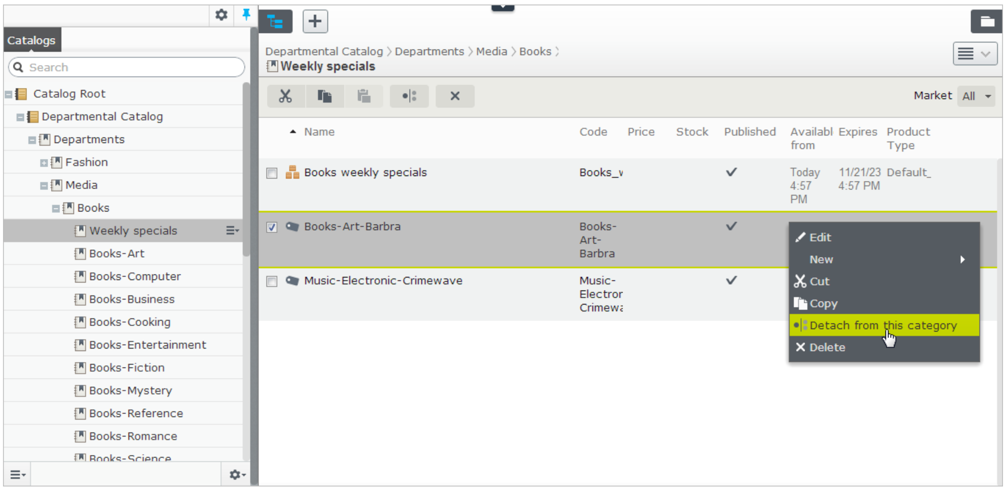
Do the following to create a link from a product to a category:

1. In the **Catalog** view, select the desired product in the main listing.
2. Drag the product into the desired location in the catalog tree to the left.
3. Click **Link here** in the **Paste Item** dialog.

Detaching catalog entries

Do the following to detach a link between a product or a variant and a category:

1. In the **Catalog** view, navigate to the location in the catalog tree where the desired catalog entry to detach is located.
2. Select the product or variant in the main listing, and then select **Detach from this category** in the Context menu, or click the **Detach from this category** button.

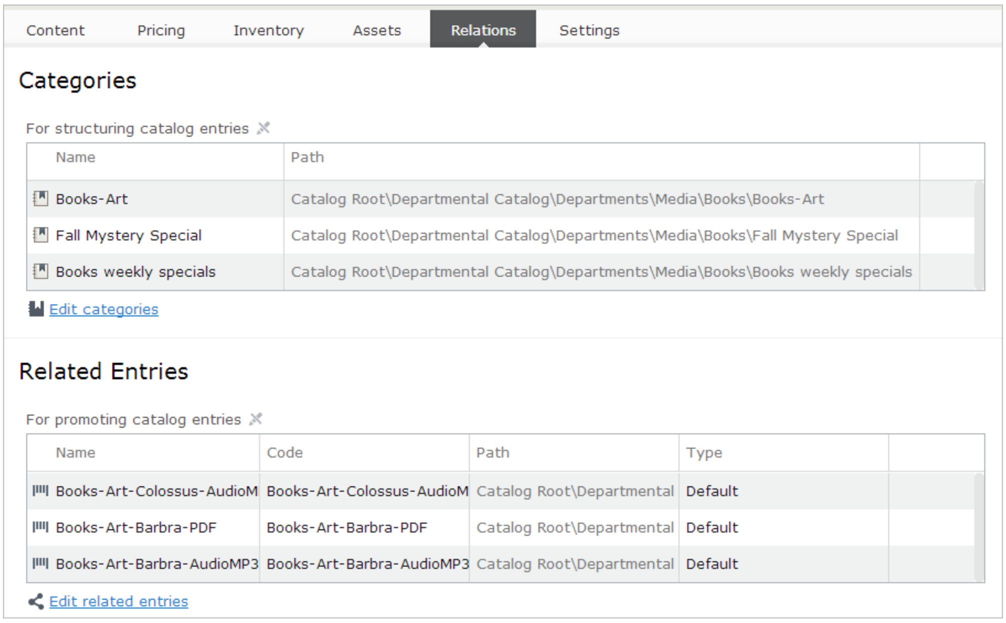


To detach multiple catalog entries at the same time, select the entries in the item list and click the **Detach** button in the menu.

> If a product or variant is linked to only **one category**, the detach option will not be available. This is to avoid that products or variants become "orphans" without a category location, and difficult to locate in a product catalog.

Viewing relations

To view relation links for a product or a variant, select the item in the main listing to access the *All Properties editing view* and go to the **Relations** tab.



In addition to category links, there are also other types of links between items in a product catalog. Refer to *Editing products and variants* for more information on how to work with links.

See also

Refer to the following sections for information about creating, editing and deleting catalog entries:

- *Creating catalog entries*
- *Editing catalog entries*

Managing pricing

The **Edit Prices** overview provides a convenient way of viewing and editing pricing within product catalogs. Using this view you can review a compact list of prices by *market* or *customer group*. Prices are displayed in the default currency for a market, together with minimum quantity and availability date for the defined price. There might be multiple prices with different currencies for the same market. Both active and inactive markets will be displayed in the market filtering. You can also add prices to variants (SKUs) from this view.

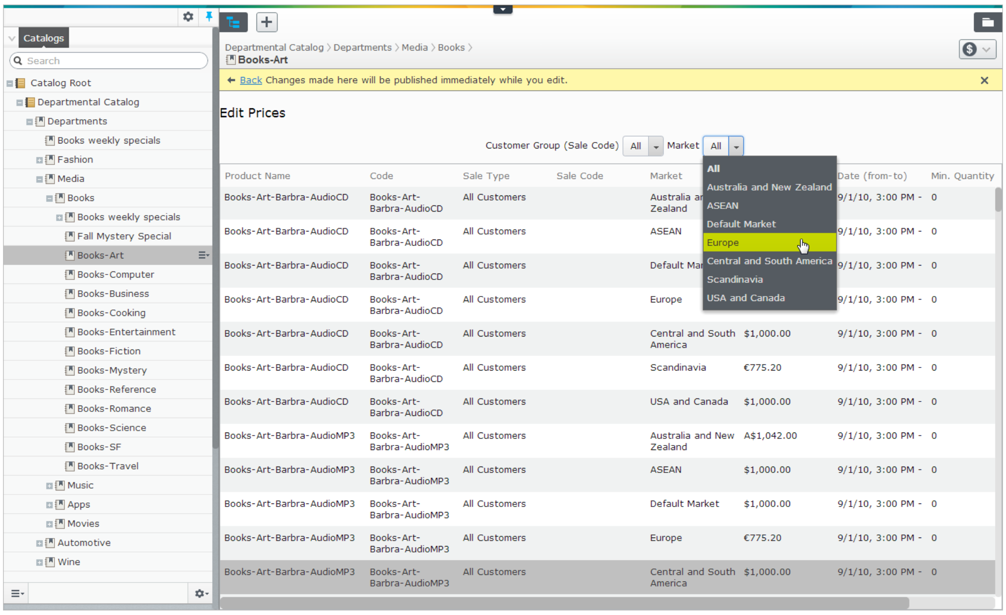
Changes to the **pricing** information will be instantly available on the website, and is not included in the *saving and publishing flow* for the rest of the content.

Viewing prices

Do the following to view prices:

1. In the **Catalog** view, navigate to a category to display products and variants in the main listing.
2. Select **Pricing** from the view selector in the upper right corner to access the pricing editing view.

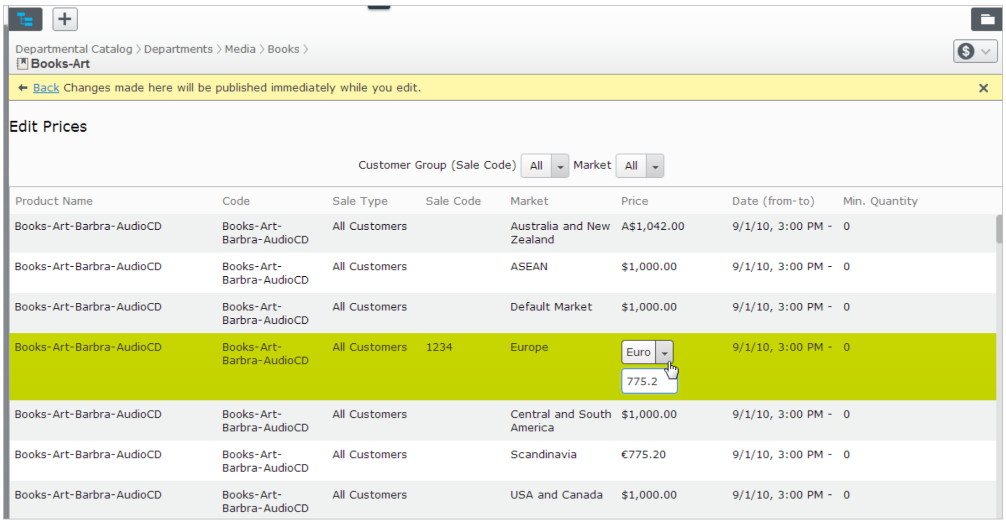
3. Use the filtering options on top for **Customer Group** and **Market**, to filter the price list and make it easier to locate the desired pricing information



Note that only catalog entries with a price will appear in this listing, even if the catalog entry is published. This means that if you have added new variants for a product, and these have no price, you will not see them in the pricing overview.

Adding and editing prices

Adding a price for a variant (SKU) is done from the **Pricing** tab in the All Properties view when *editing product variants (SKUs) or packages*. To add a price for a variant, click **Add Price** and enter the desired pricing information by clicking on each editable property. Click on a property to edit the existing price information. See below for a description of editable pricing properties in the sample site.



The following pricing information can be edited:

- **Sale Type** - associate the price with either **All Customers**, a specific **Customer** or a **Customer Price Group**. With the last option you can create tiered pricing (differentiated pricing).
- **Sale Code** - 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 type, you put the name of the *customer group* in the Code field. If the Code field matches a customer group, any member of that group will receive the specified price.
- **Market** - associate the price with a *market* for your website.
- **Currency** - associate the price with a currency, to create different prices depending on the selected currency.
- **Price** - the price that will be displayed on the public site.
- **Date from/to** - the time interval when the price will be available.
- **Min. quantity** - the minimum number of units that must be purchased to get a discounted bulk rate.

Duplicating and deleting prices

- Select **Duplicate** in the context menu for the entry you want to duplicate, to use as a foundation when creating a new pricing item. Edit the information as desired and click **Save** when done.
- Select **Delete** in the context menu for the entry you want to delete, and click **Yes** to confirm. **Note** that the deletion of a price cannot be undone.

See also

Refer to *Editing catalog entries* for more information on how to edit other properties for catalog entries.

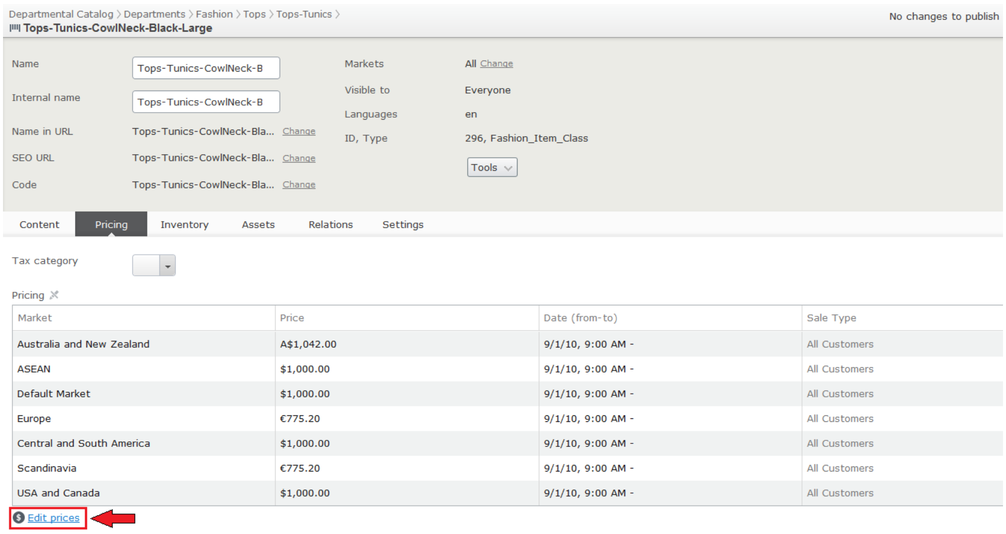
Setting pricing by customer group

Customer groups are useful for instance when setting specific permissions and targeted *marketing campaigns*. This document describes how to apply customer groups to specific pricing.

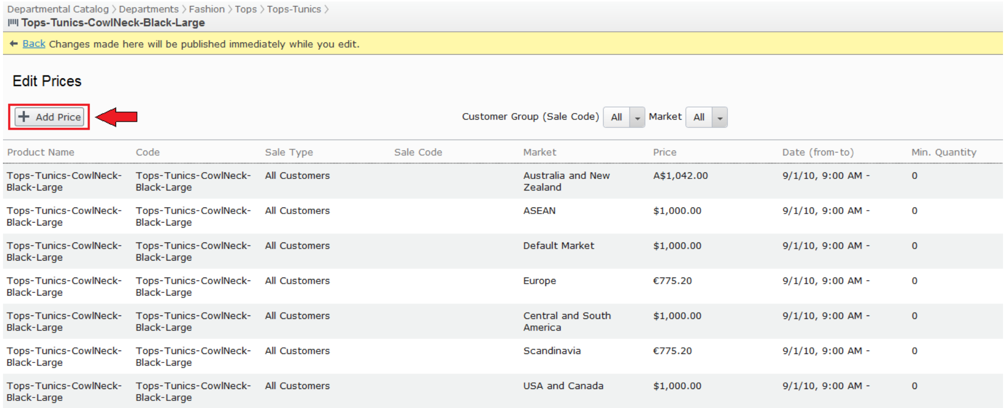
Applying customer groups to pricing

Do the following to define specific pricing for a customer group.

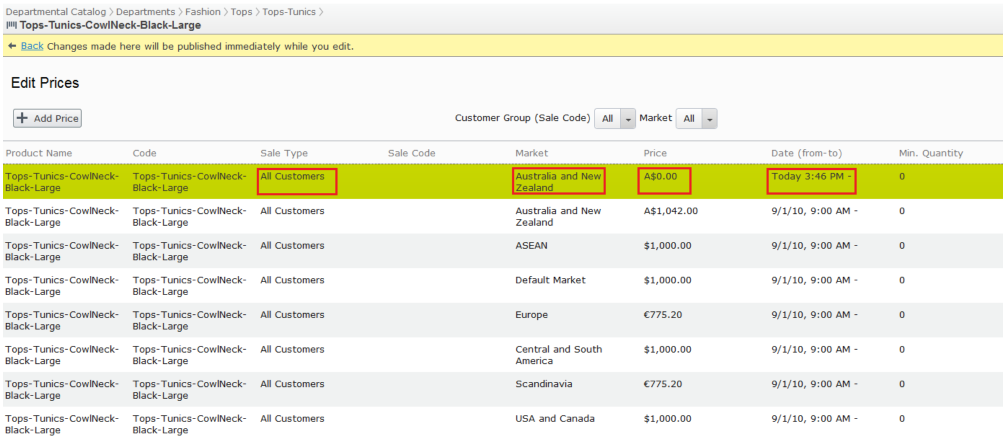
1. In the **Catalogs** view, navigate to a variant, select the **Pricing** tab, and click **Edit prices**.



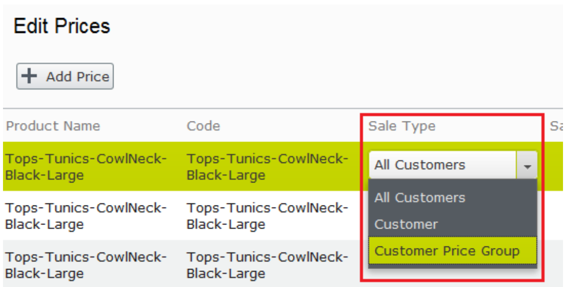
2. Click **Add Prices** to add an additional price line that can be set as specific to a customer group.



3. Select the desired price line to edit. The new line can be identified by the current timestamp showing in the **Date** (from-to) column. By default the new line will have "All Customers" selected as Sale Type, and the first market (in alphabetical order), the associated default market currency, and a zero price will be displayed.

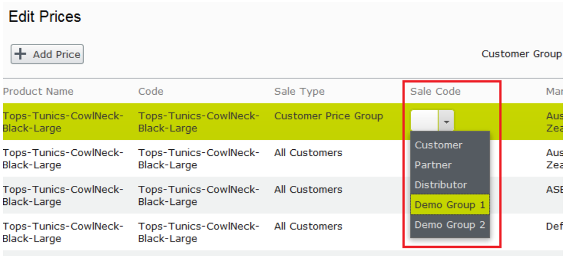


4. Click the **Sale Type** to edit, and select the **Customer Price Group** option.

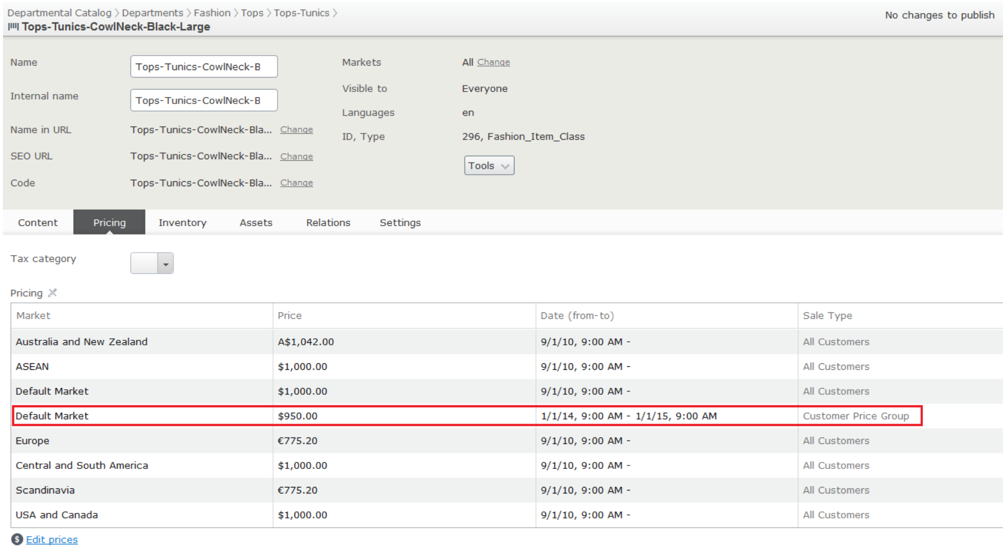


5. Selecting Customer Price Group opens an additional drop-down list for selecting the specific **Customer Group**. Note that the customer group must first be *created in Commerce Manager*, before it

will appear in the listing.



6. Edit the rest of the *pricing information* as appropriate, and return to the variant page when done (the information will be instantly updated).
7. The new customer group-specific pricing information will be displayed.



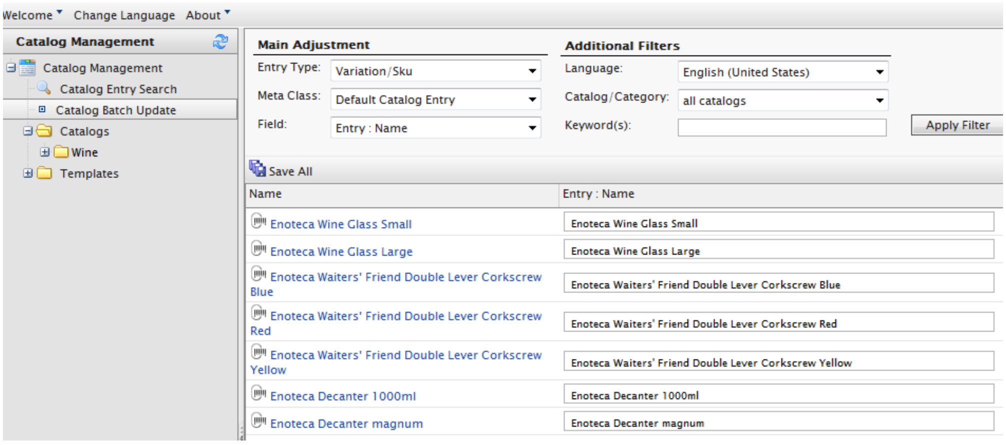
Catalog batch update

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 in Commerce Manager allows you 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**.

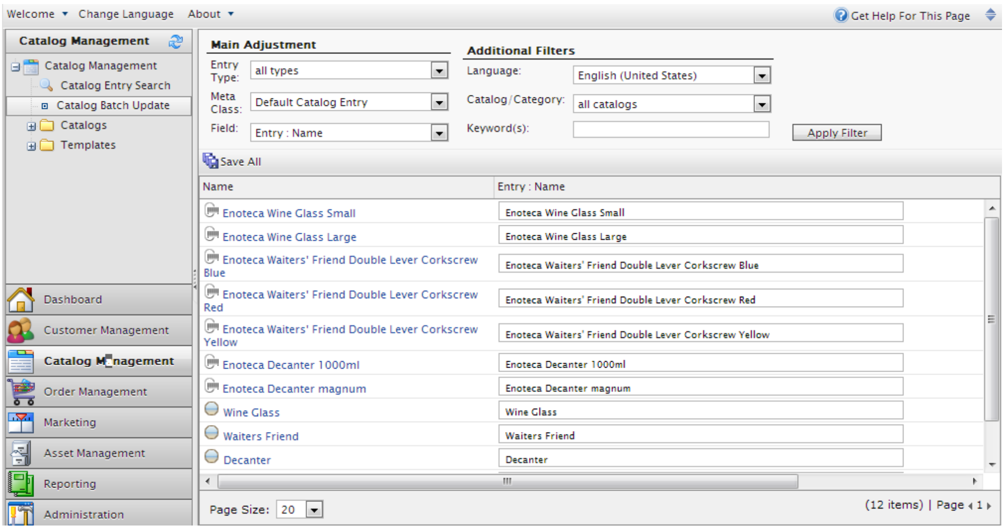
Updating multiple catalog entries

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 **Keywords**. 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**.

Orders

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.

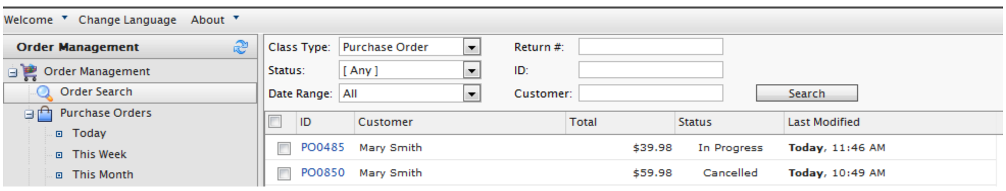
Refer to the *Shopping Workflow* section for a general description of the shopping procedure in EPiServer Commerce.

Browsing orders

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.

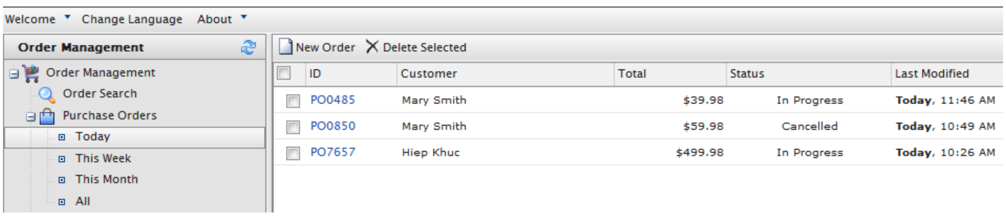
Click on **Search** to being your search query. The desired results appear below. The results are broken down by five column fields:

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

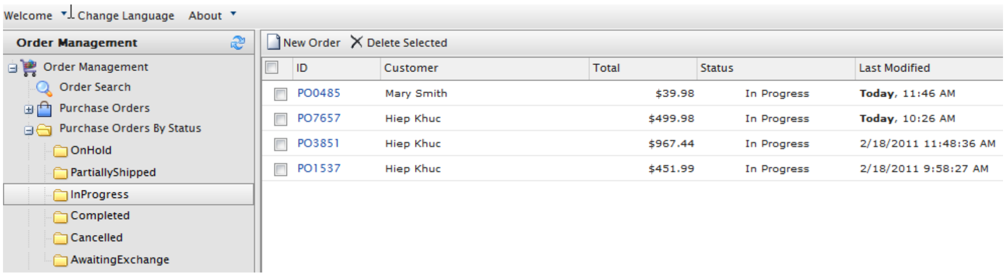
You can sort results by **ID**, **Customer**, **Total**, or **Status**.

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.

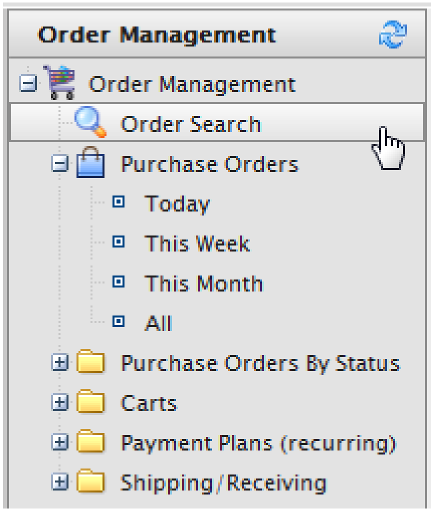


Moreover, you can view orders within the **Order List by status**. For example, click on **Purchase Orders by Status > InProgress** to view orders with that status.



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

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.

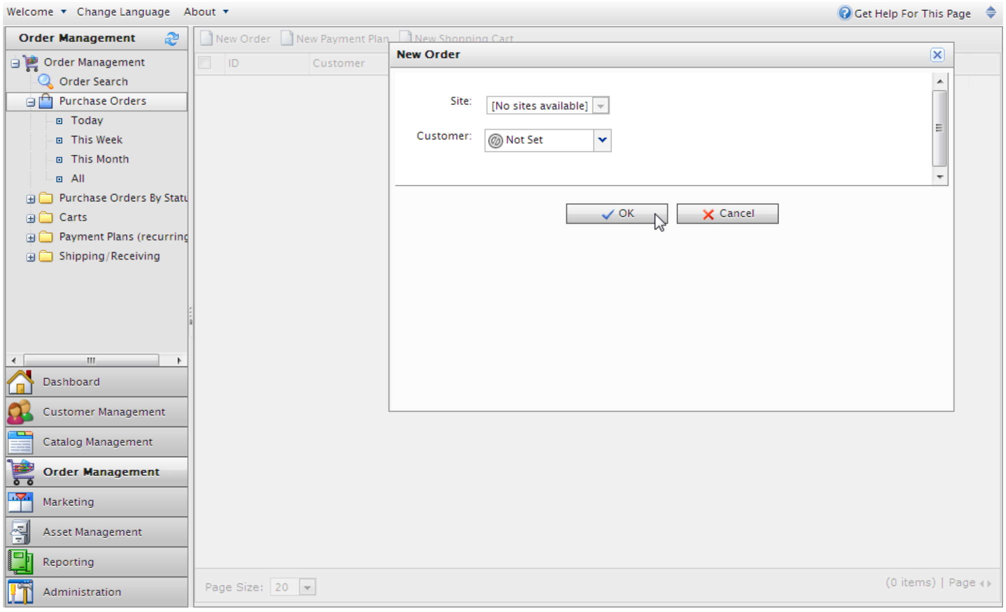
Compared to the customer management option, it is faster and has additional alternatives for orders such as **Purchase Order** versus **Payment Plan**. Using the Customer Management system takes a little longer but allows you to double-check a customer's information before beginning an order.

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**.

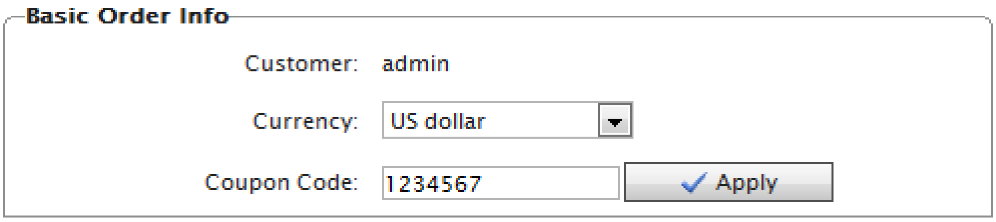
2. Click on **New Order**. A pop-up appears, allowing you to select the site and contact to apply the new order to. Use the drop-downs to make your selections. For Customer, if your customer is not listed select **More** to search for them.



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

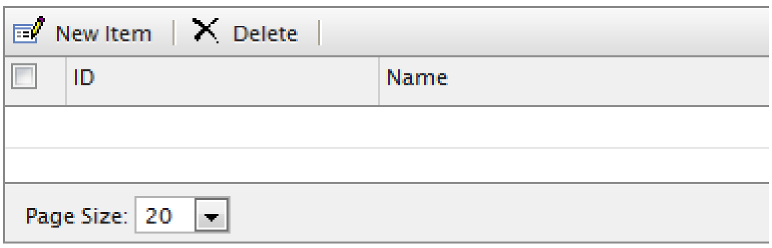
Filling out the purchase order

1. Enter basic order information.

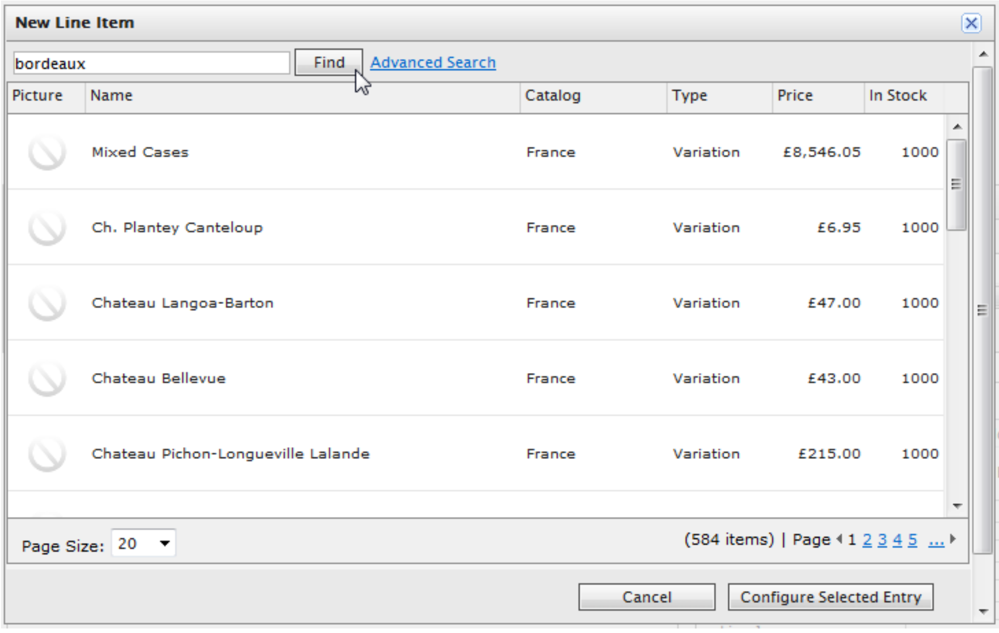


Field	Description
Customer	This is the name of the contact.
Currency	Select from the drop-down list the currency to associate with the Purchase Order.
Coupon	Coupon codes created with a promotions can be applied here to associate with the Purchase Order. Click Apply once code is entered.

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.

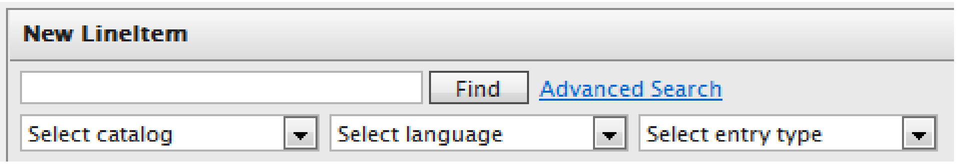


3. Search for items by entering your search terms into the search field and click **Find**. You can sort your search results alphabetically by clicking the **Name** column. Select an item from the list and click on **Configure Selected Entry**.



Advanced search

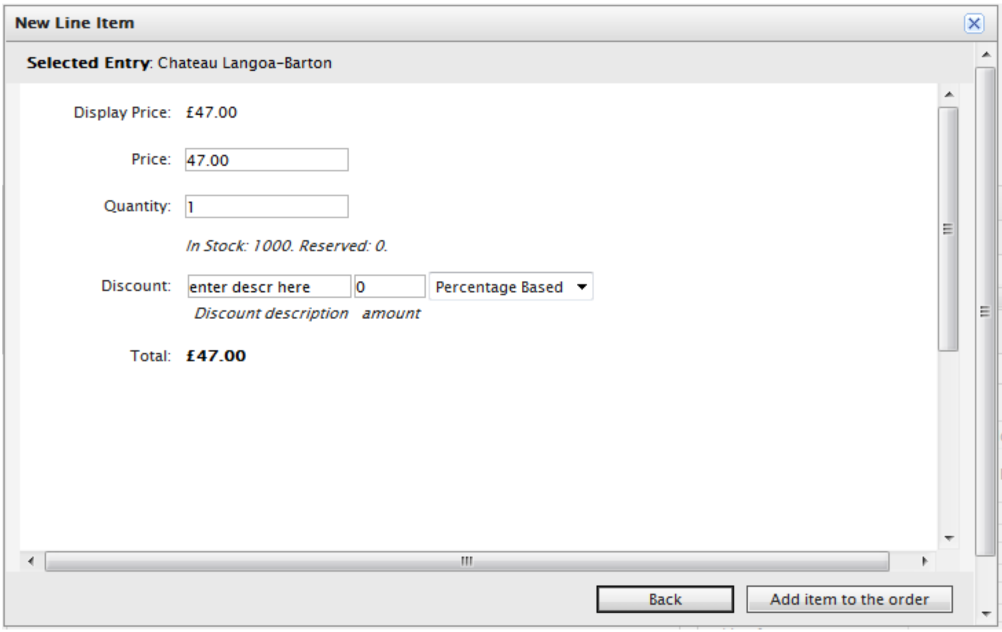
You can apply three filters to refine your item search results.



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.

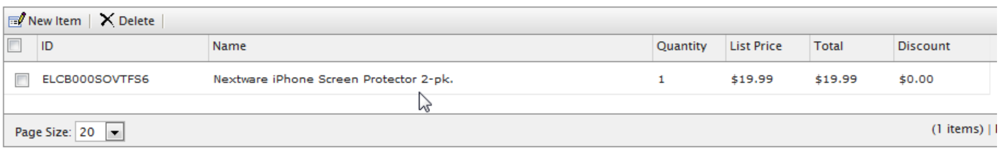


Required fields

- 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.

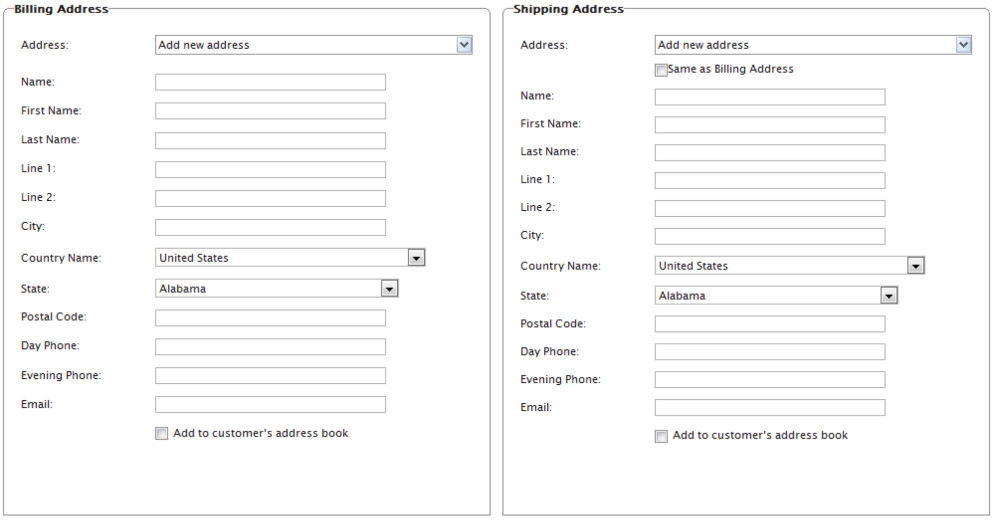
2. Once the item is configured, click **Add item to the order**. The item will appear on the Purchase Order form.



Completing the rest of the purchase order form

1. Enter a Billing and a Shipping Address.

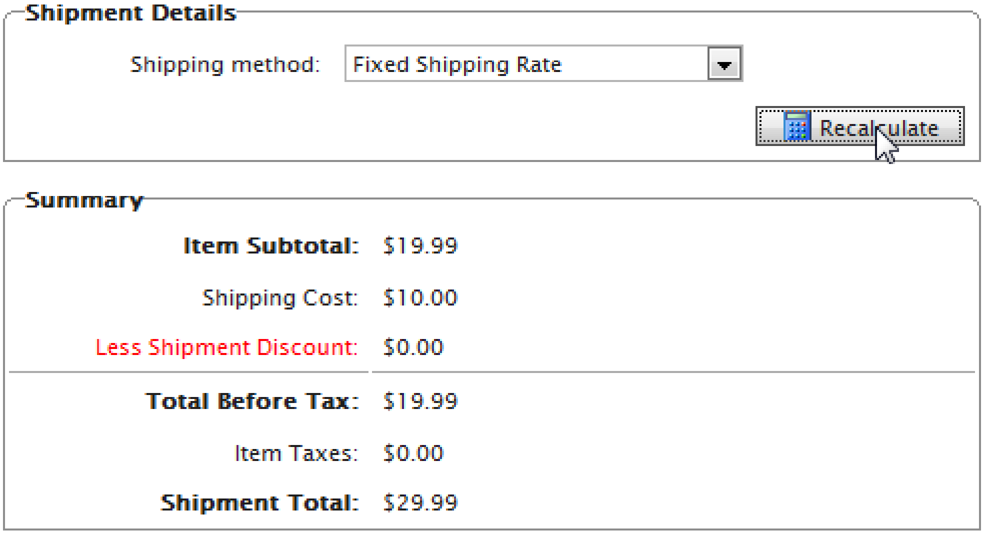
   When entering the Shipping or Billing Address, you can select an existing address associated with the contact, if any.



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.

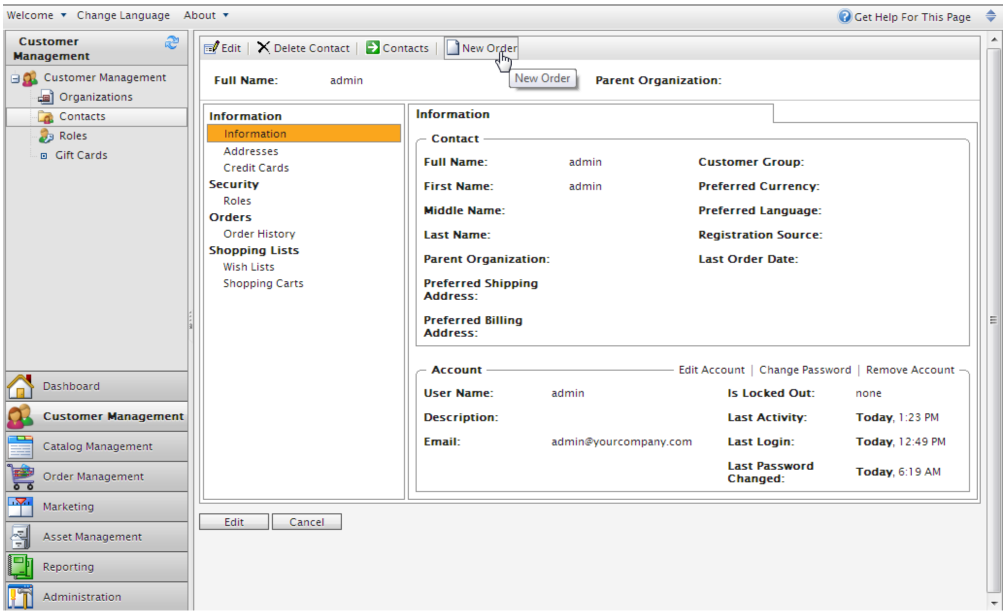


4. Click **OK** to save the order.

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

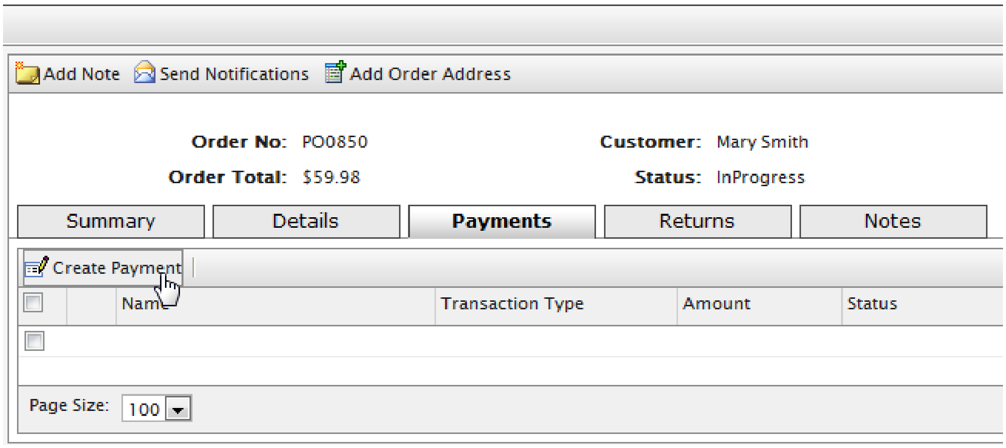
The order **processing or fulfilling**, includes adding a **payment** and releasing the order for **shipping**. These steps are needed in order for the order to be completed and ready for shipping to the customer. When the payment is cleared the order will be released for packing and shipping. Depending 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**.

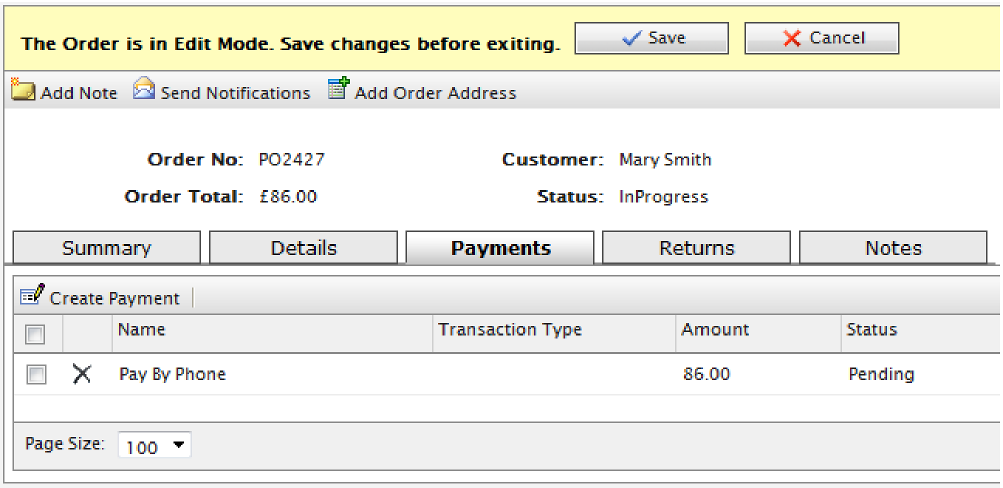
Submitting payment and releasing to shipping

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.

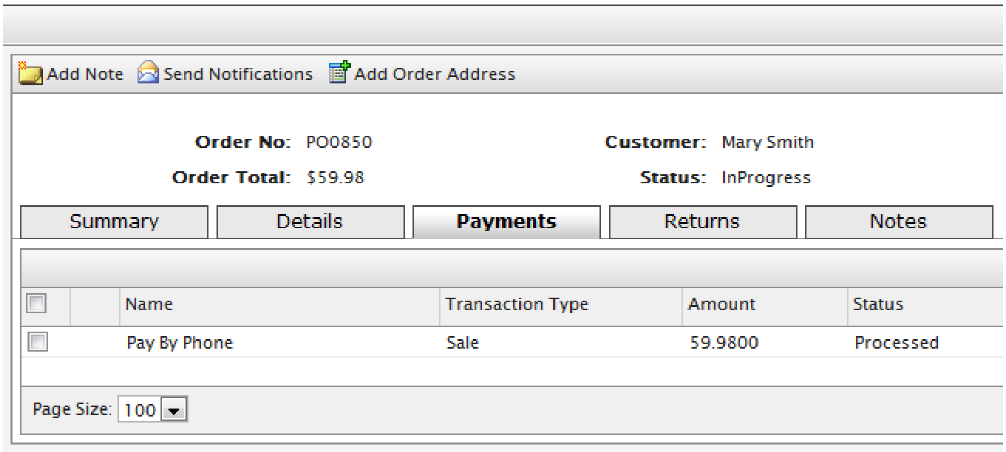


3. Enter the amount of the payment. The **Amount** field auto-populates the value of the total order, including shipping costs. However, you can change the value of the payment (useful for splitting payments between two or more payment methods at the request of the customer).
4. Select the **Payment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

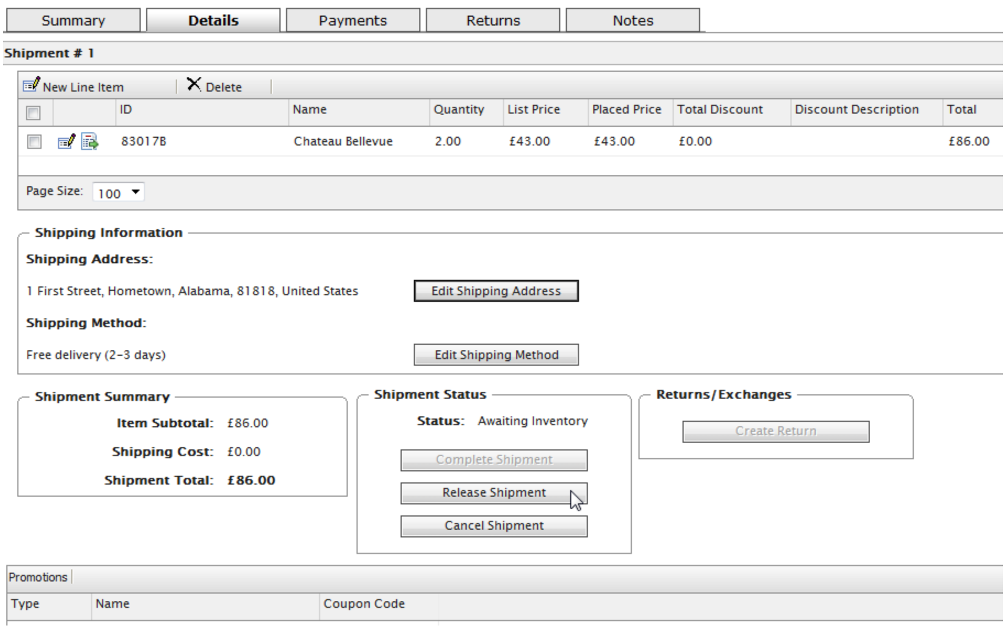


Note: When in Edit Mode, you can add more payments to the order. However, once you click **Save**, you finalize the payment. This means that you cannot add or delete any further payments.

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.

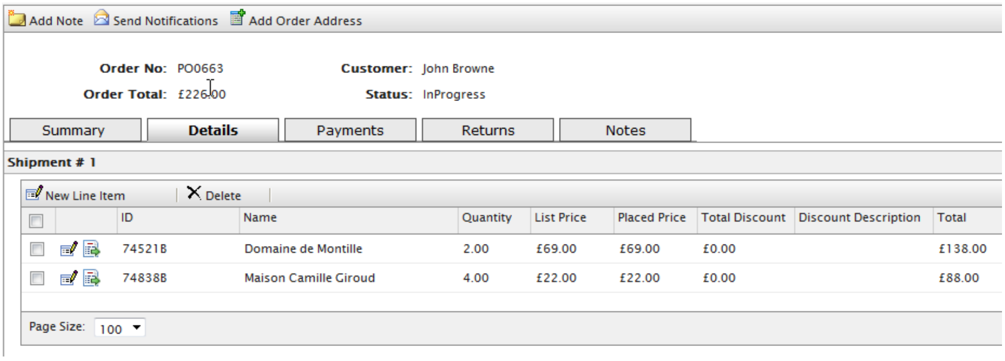
Splitting shipments

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.

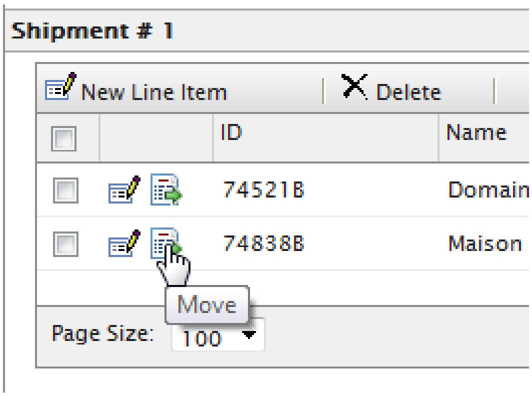
Splitting a shipment for an order

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**.

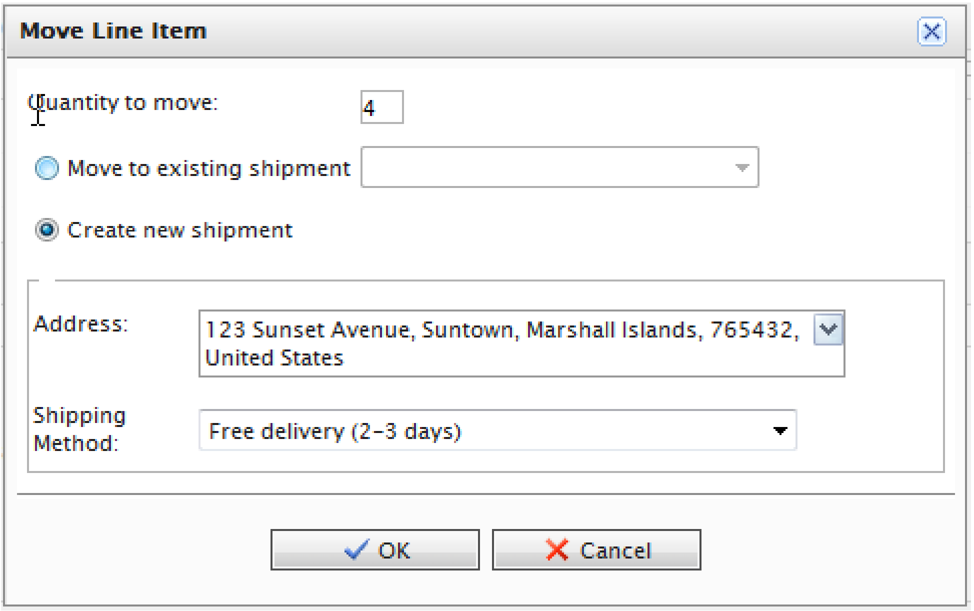


3. Select the item you want to move by clicking on the **Move** icon.

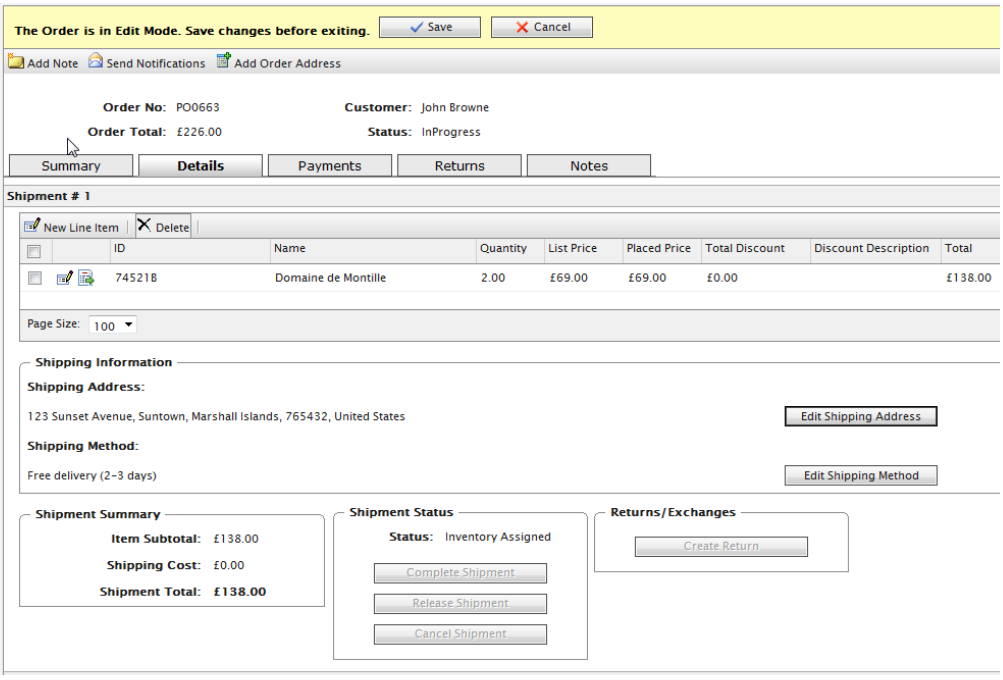


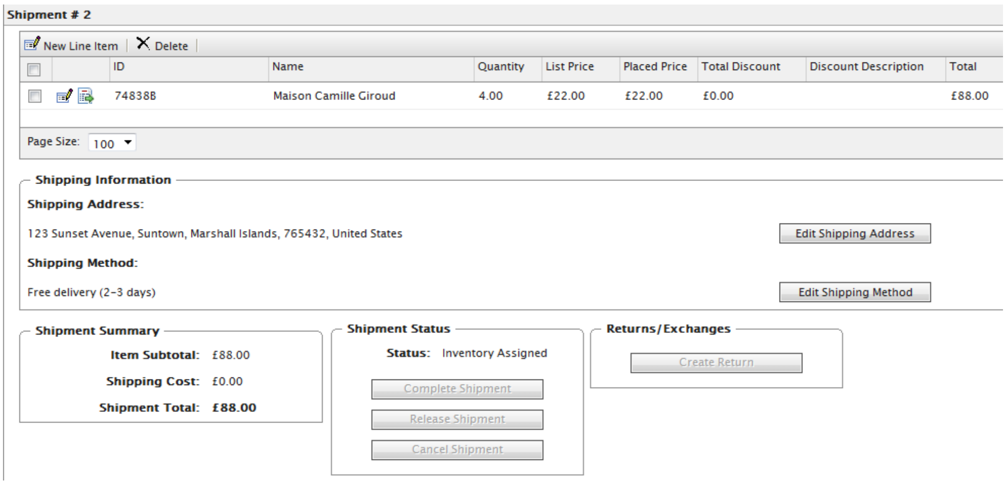
4. The pop-up appears, which allows you to choose to move the item(s) to an existing shipment or create a new shipment. You can also select the quantity of the item to move. Each new shipment within the order can have its own separate shipping address and shipping method. Select a shipping address and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

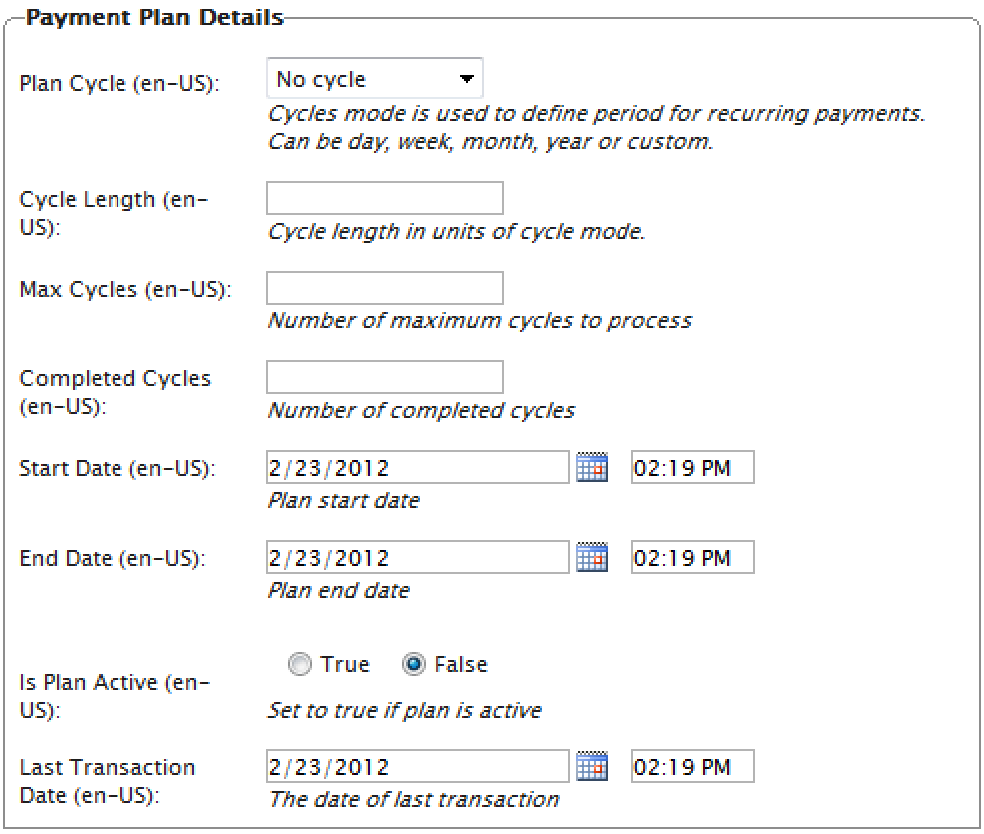
Payment plans work exactly like orders, except that you use them spread out the payments over time that a customer has to make. This allows flexibility in how you sell your products, as well as how a customer pays for them. You can use this for large and complicated orders, orders that need to be shipped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

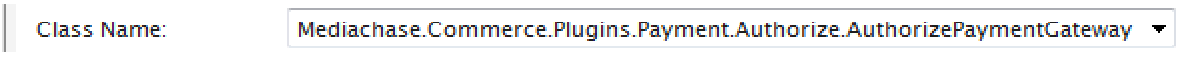
Creating a recurring payment plan using Authorize.Net

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

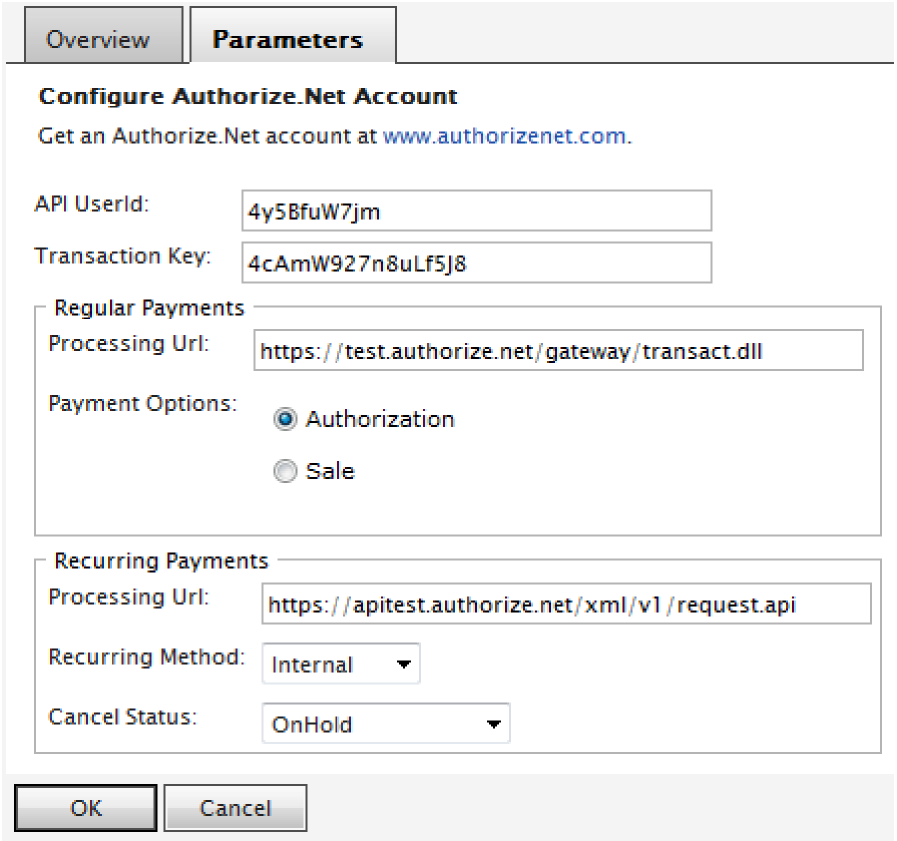
For more information on how to setup payment methods, refer to the *Payment Gateways* section.

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

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

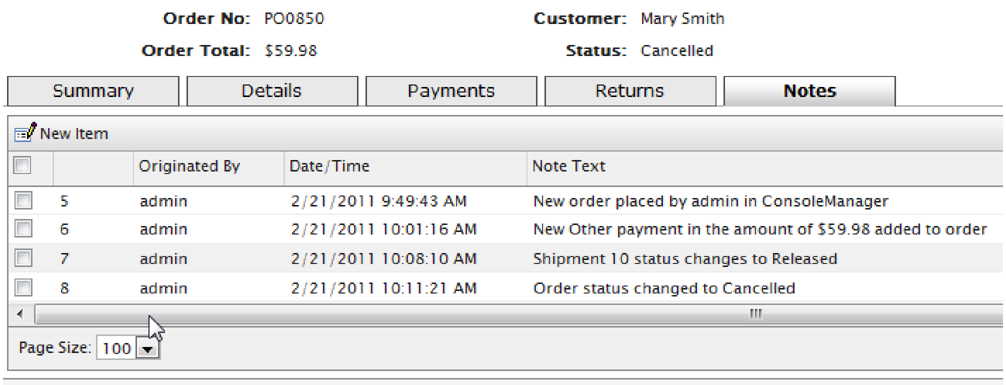
Notes.

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

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.

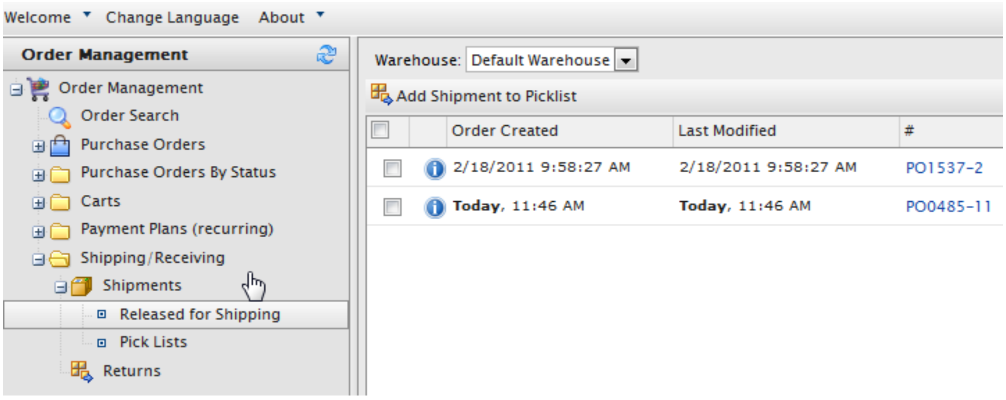
The final parts in completing the order processing includes these tasks:

- *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**.

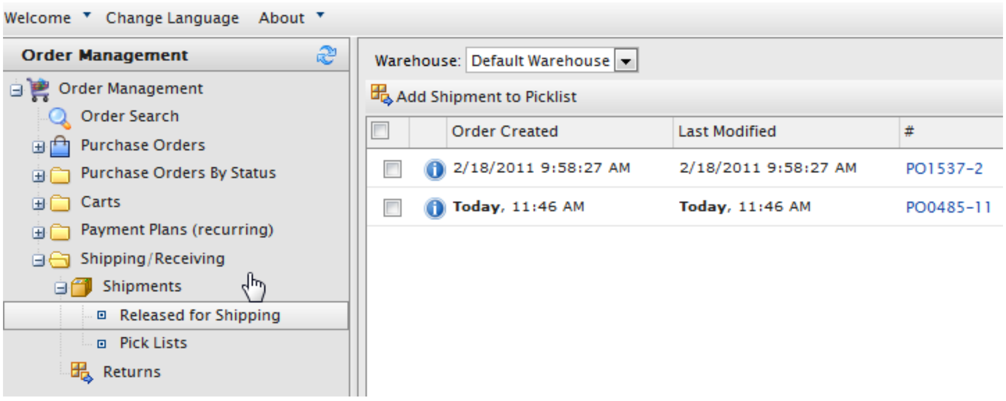
Creating picklists

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.

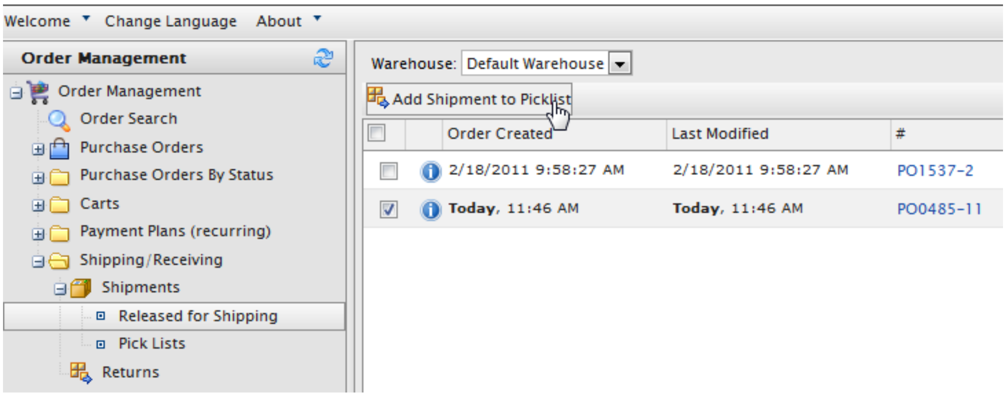
When an order has been added to a picklist in this step it will have the status "In Progress" in the order list. It will disappear from the **Release for Shipping** list and appear in the **Picklist** listing under **Shipping/Receiving**.

Creating picklists and adding shipments

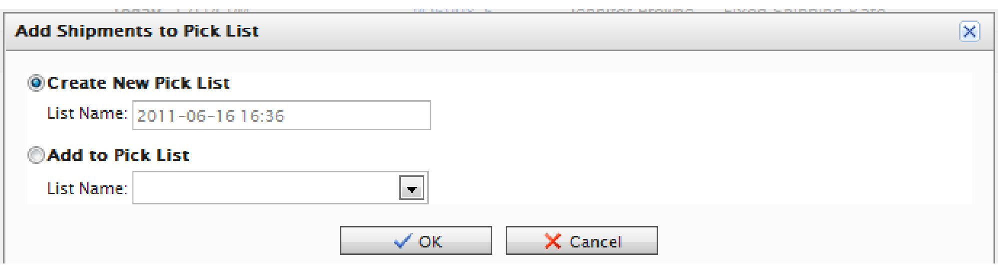
1. Go to **Order Management > Shipping/Receiving > Shipments > Released for Shipping**. This shows the **Released Shipments** screen.



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

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.

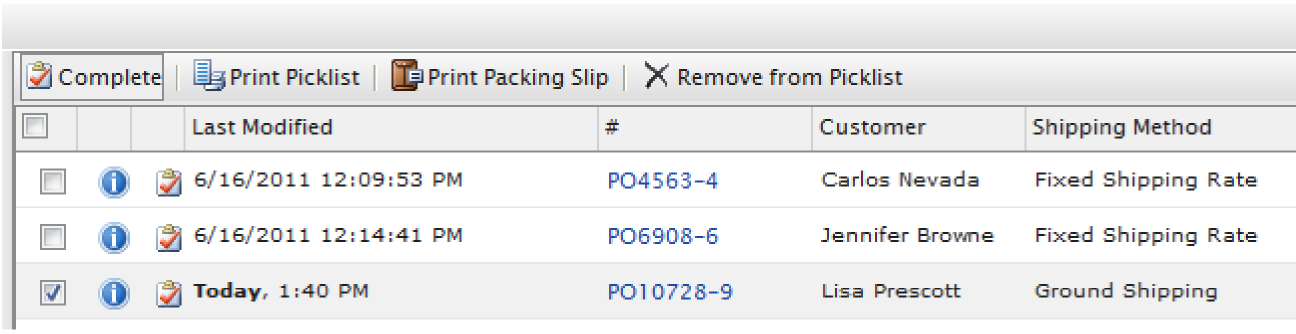
When an order has been completed this step it will have the status "Completed" in the order list and will disappear from the **Picklist** listed under **Shipping/Receiving**. The picklist will still remain in the list even if there are no packing shipments remaining.

Completing a shipment

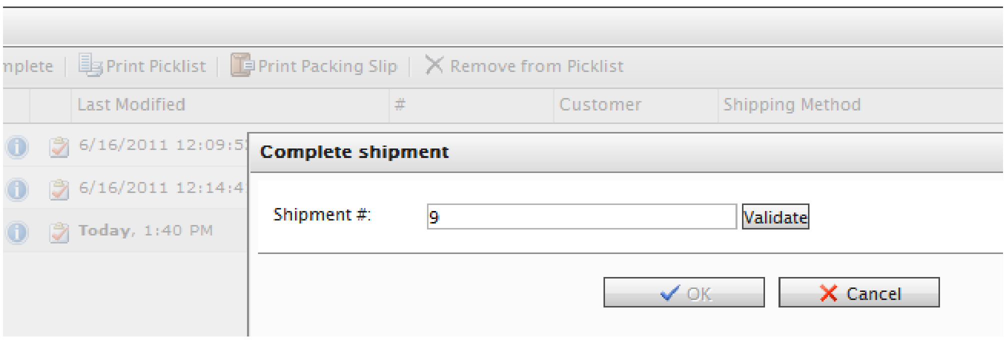
There are two ways to complete a shipment which are described in the following.

Method 1

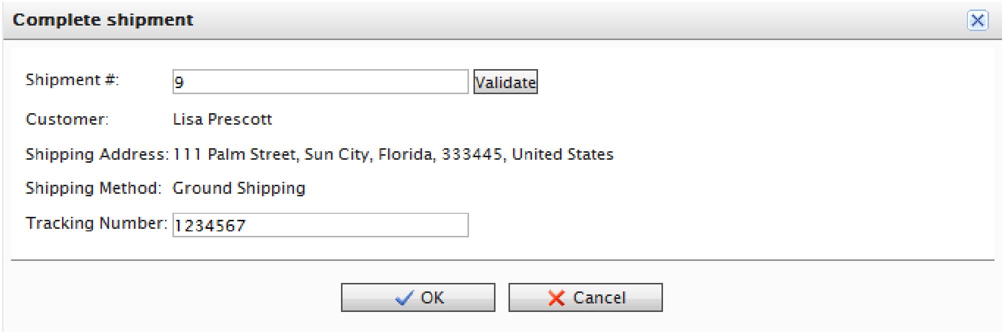
1. Select the box next to the shipment and then click **Complete**:



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".



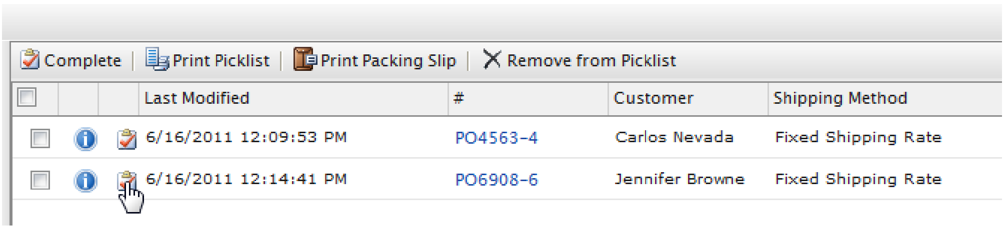
3. Click **Validate**. Once validated, you will see the customer name, shipping address, shipping method, and a field to enter in the tracking number provided by the shipping provider. Enter in a tracking number and click **OK**. The shipment is sent out and completed. The purchase order status will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



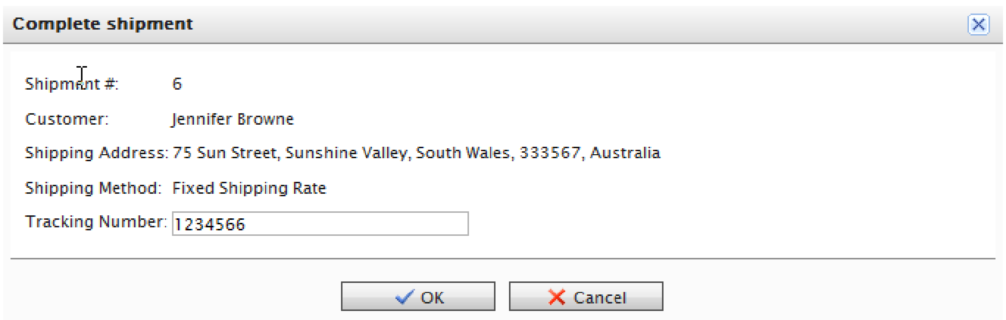
Currently, the Complete shipment pop-up is rendered over the purchase order number. So to reference the shipment number without closing the pop-up, you can move and drag the pop-up so you can see the PO number by hovering your mouse cursor over the Complete shipment title bar.

Method 2

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



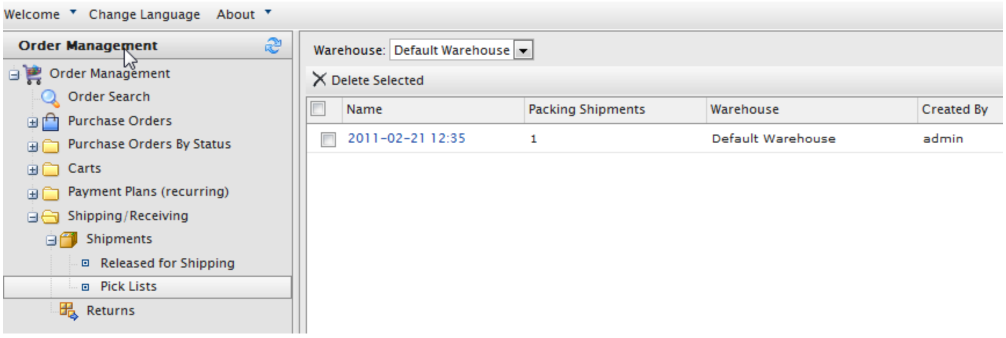
2. The **Complete shipment** pop-up appears. The shipment # is already validated with the last number of the PO number.



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

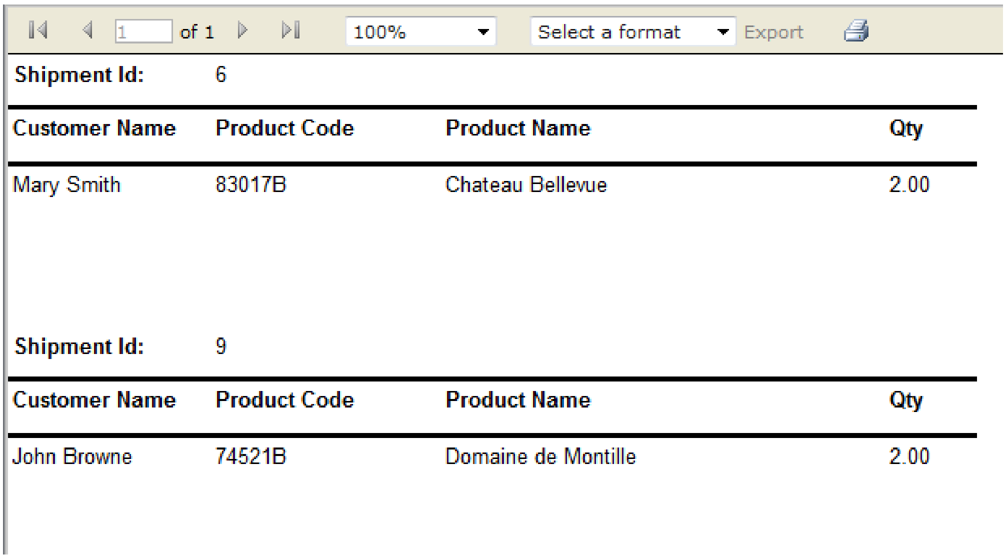
Printing picklists and printing packing slips

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

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

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.

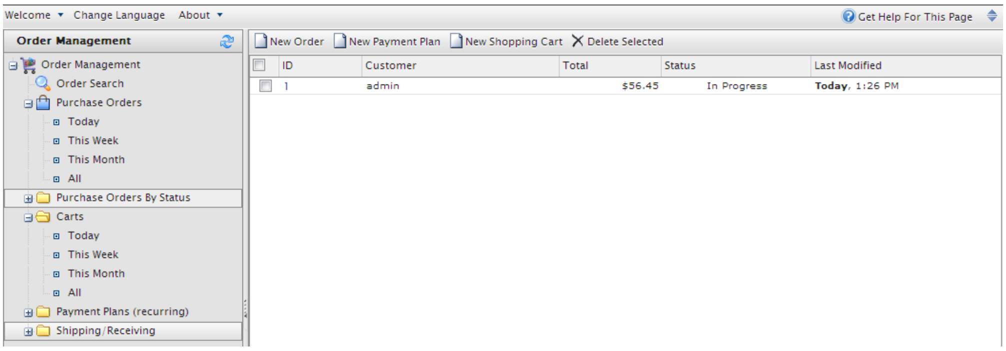
Creating a shopping cart

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.

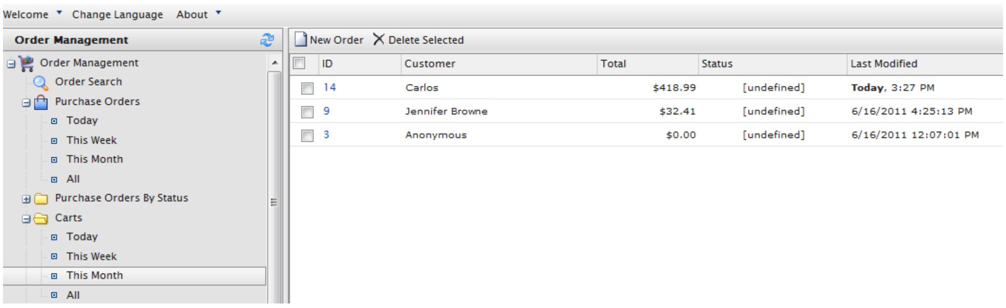


Converting shopping carts

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.

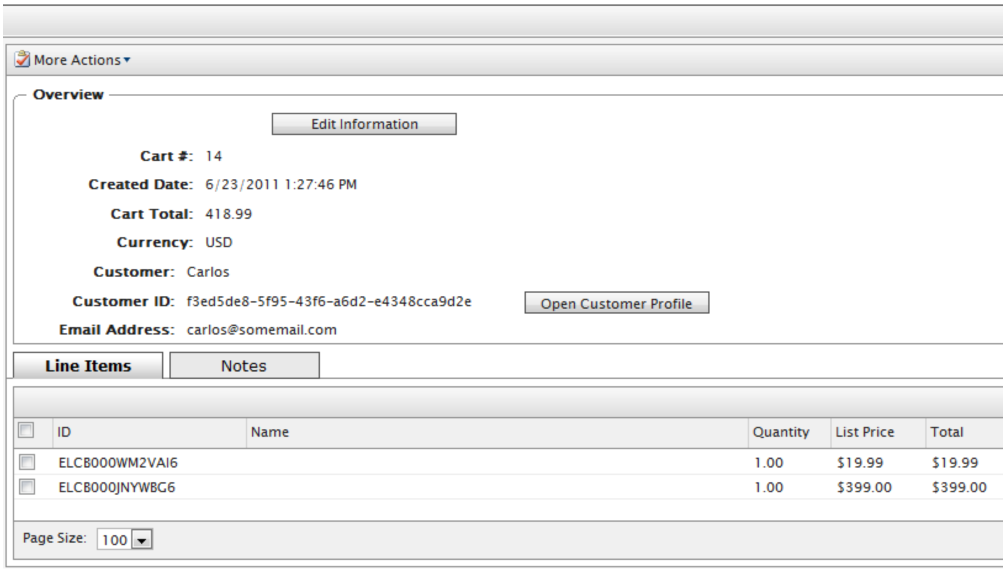
Converting a shopping cart to a purchase order

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.

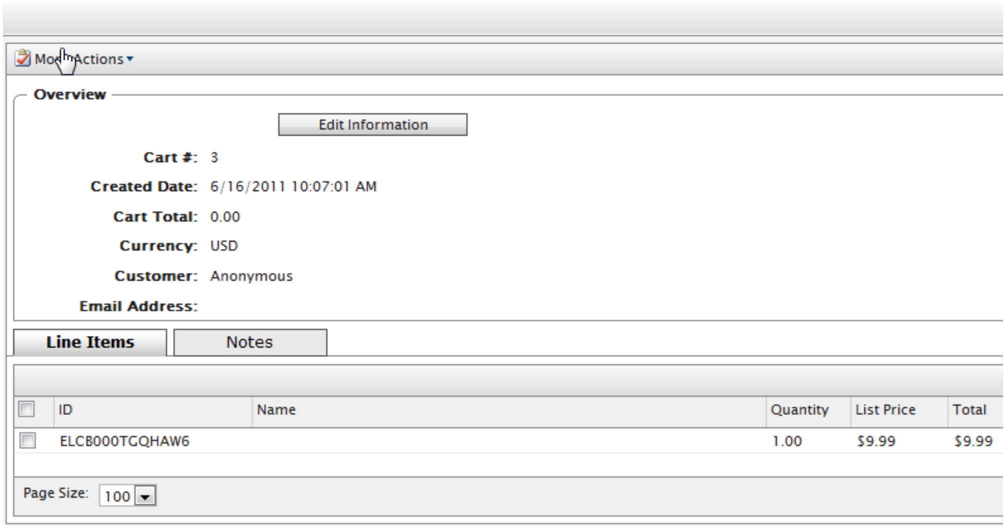


2. Click on the **ID** number of the shopping cart you want to convert over to a Purchase Order.

3. You will see the **Cart View** window and details of the customer's shopping cart.

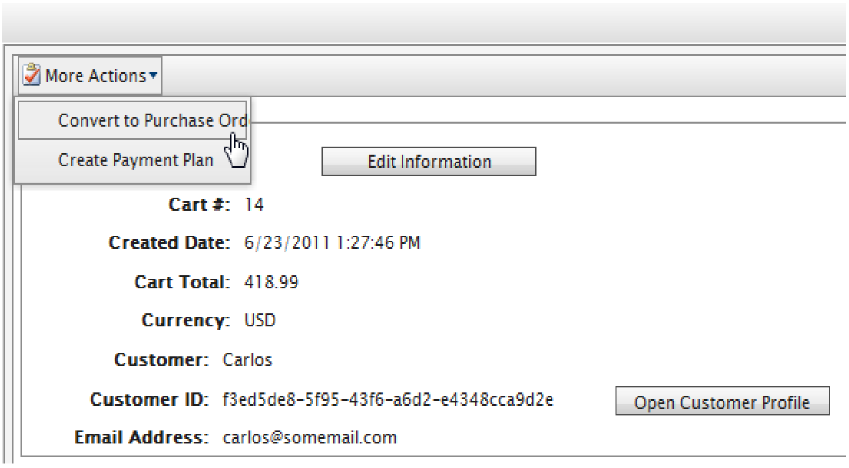


An **anonymous user Cart View** will look like this:



   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

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.

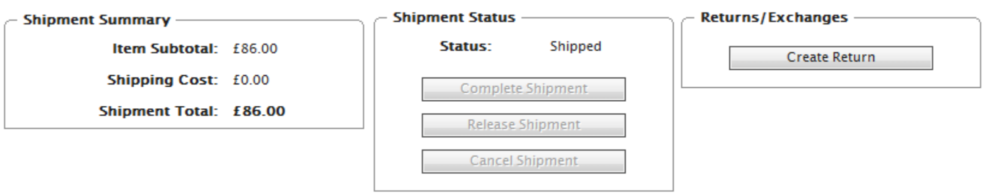
Generating an exchange creates a separate **Exchange Order** (denoted by "EO", instead of "PO") tied to the original purchase order. An exchange order is similar to *processing a purchase order*, as it involves payment processing and releasing packages for shipment.

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

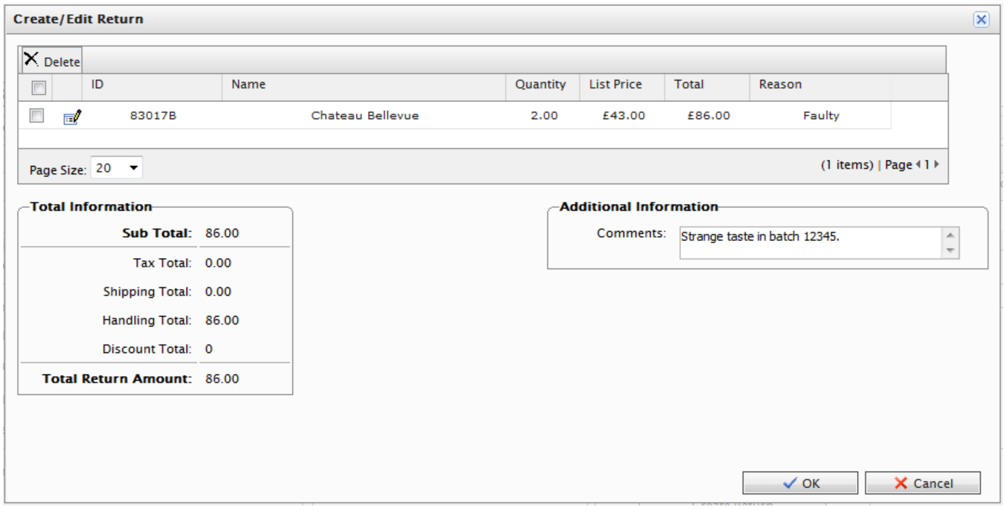
Initiating a return

Do the following to initiate a return:

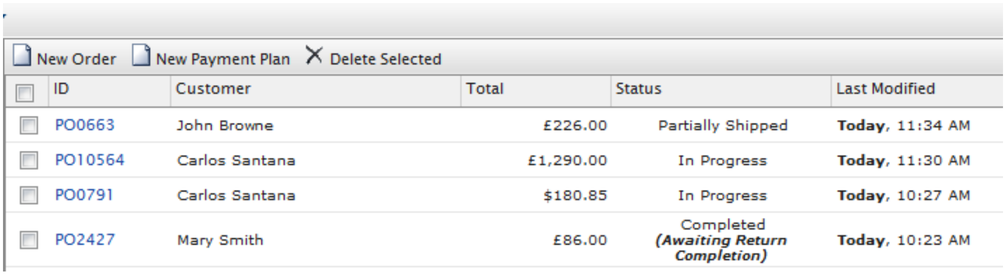
1. Go to purchase order that has been finalized and shipped. Go to the **Details** tab and you will see that the **Create Return** is available under **Returns/Exchanges**. Click on it to begin the return and/or exchange process.



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.

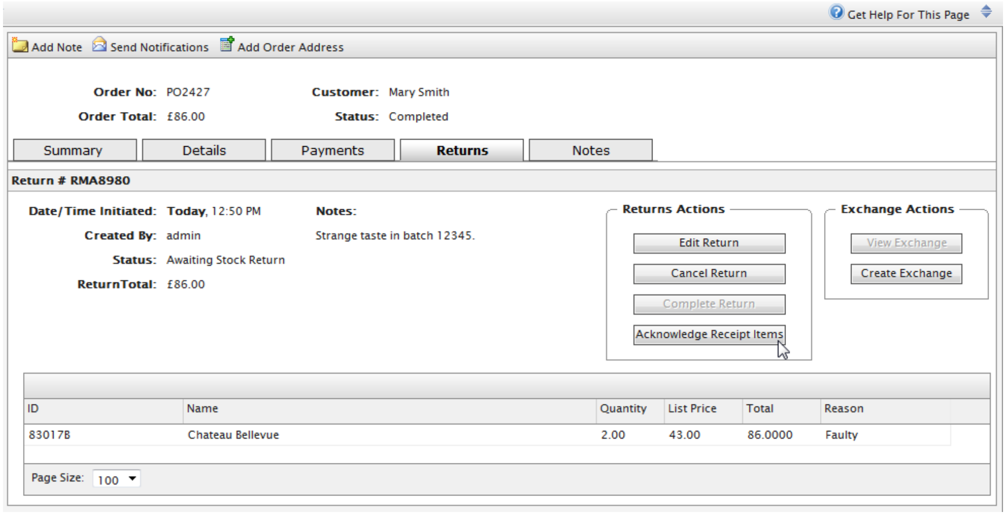


4. The purchase order will go into **Edit Mode**. Click **Save** to continue the return process. Otherwise, click **Cancel** to cancel the return.
5. In the **Order List**, the order will now appear with status **Completed/Awaiting Return Completion**.



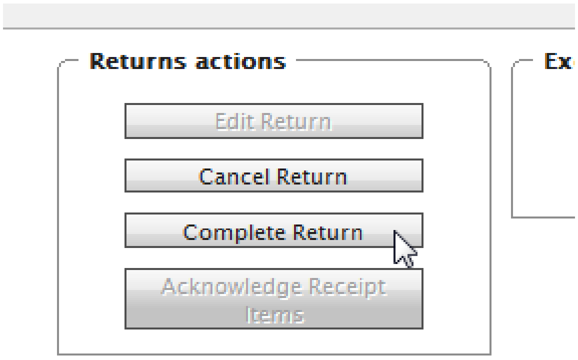
Return completing actions

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**.

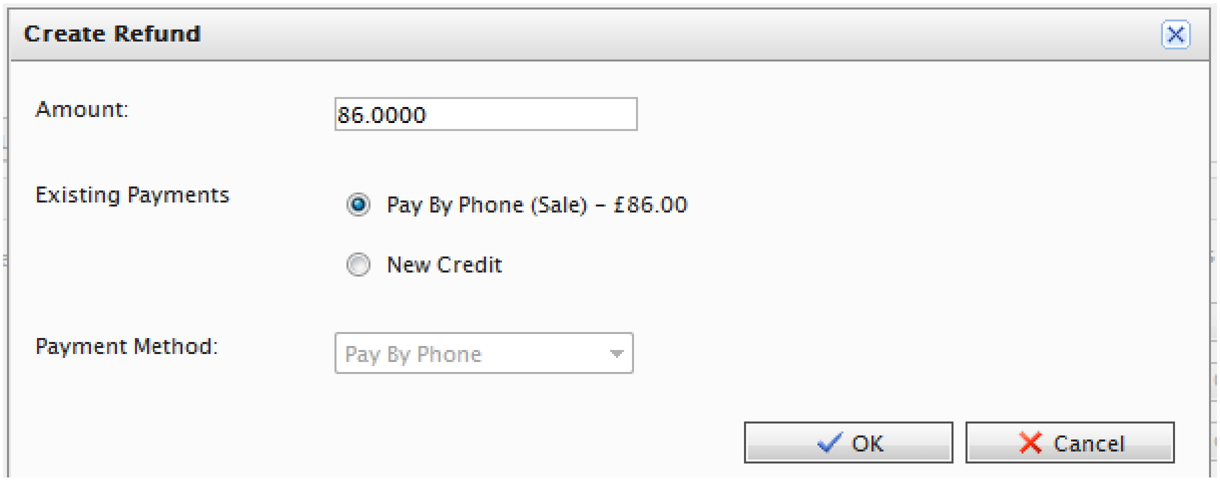


You can also choose to edit the return or cancel the return completely.

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



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

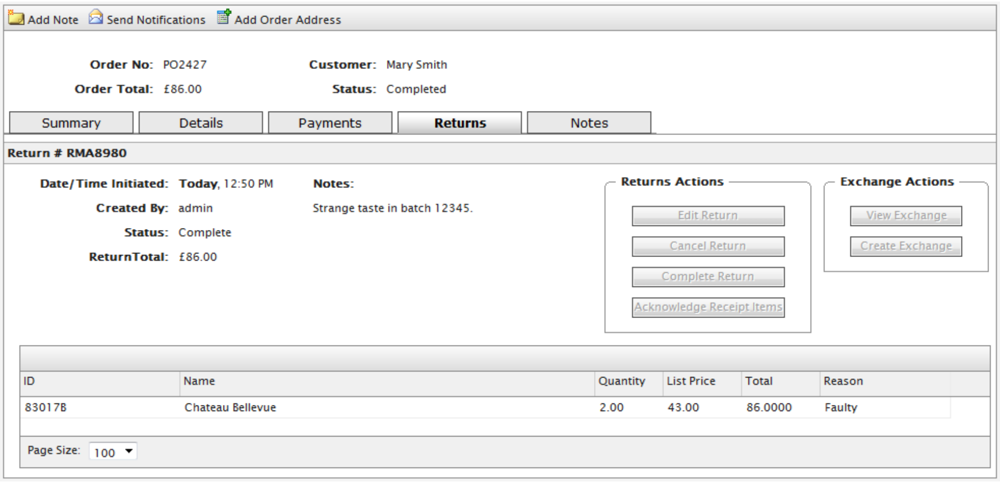


   a. The Amount value defaults to the invoice cost of the item (not including the shipping costs). For example, if the item cost $49.99 and the shipping cost was $2, then the Amount text box will show $49.99.

      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.

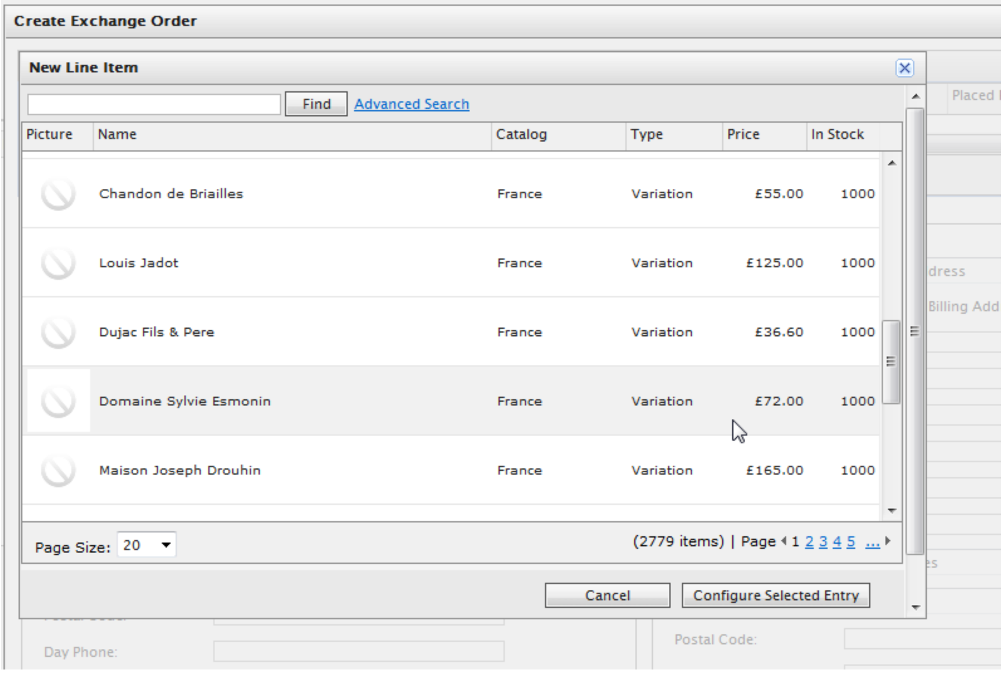
4. Once done, click **OK** to create and process the refund. The status of the purchase order changes to **Completed**.

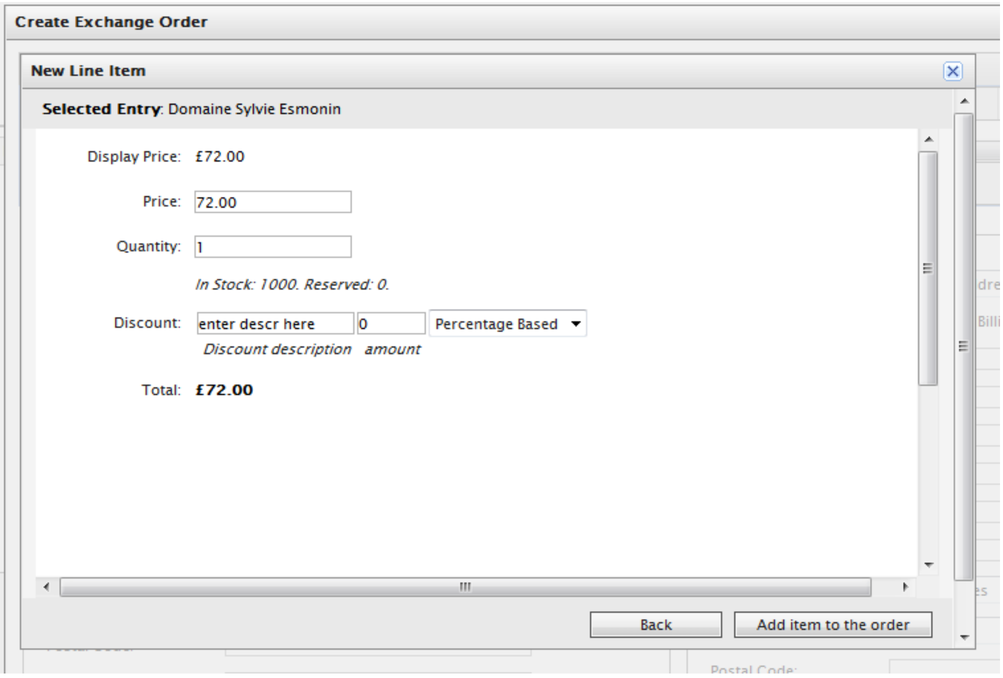


Initiating an exchange order

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**.



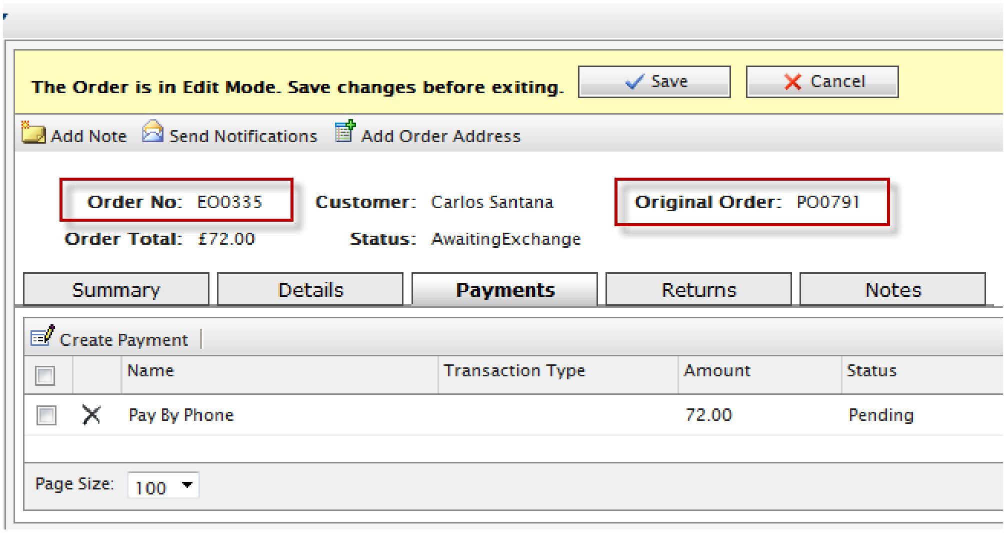


5. Enter a shipping and billing address. Select the shipping method to use for the Exchange Order. Click on **Recalculate** to adjust the Summary total.
6. Click **OK** once done.

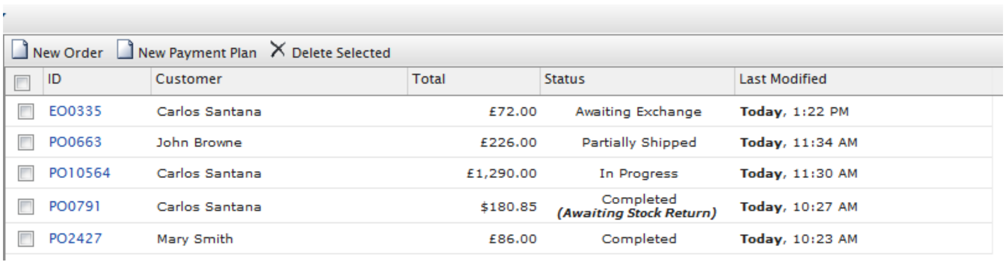
Viewing an exchange

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.

Customers

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.

Contacts can be managed within **customer groups** and **organization customer groups**, to which you can apply specific pricing and discounts, as well as personalization.

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

Under **Organizations**, you 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 assigned to organization **customer groups**, to which you can apply specific pricing and discounts, as well as personalization.

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:

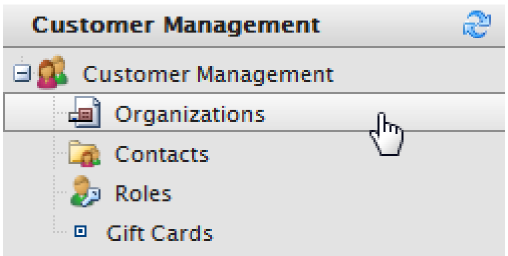
- *Creating organizations and organization hierarchies*
- *Browsing and viewing existing organizations*
- *Managing company accounts for a B2B scenario*
- *Editing and deleting existing organizations*
- *Defining dictionary values for organization types and business categories*

Browsing and viewing organizations

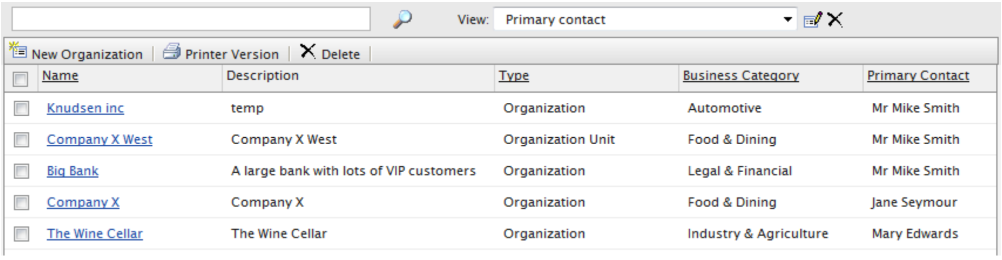
Browsing organizations

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.

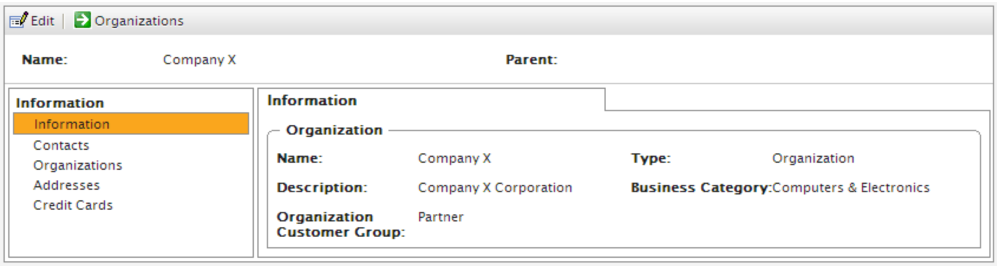


In this view, the organization details displays the following information:

Field	Description
Name	Name of the organization.
Description	Additional details of the organization.
Organization Customer Group	Select a customer group to assign for the organization, this provides the possibility to apply pricing, discounts and personalization of content for this group.
Type	The kind of organization.
Business Category	Under which category the organization falls.

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

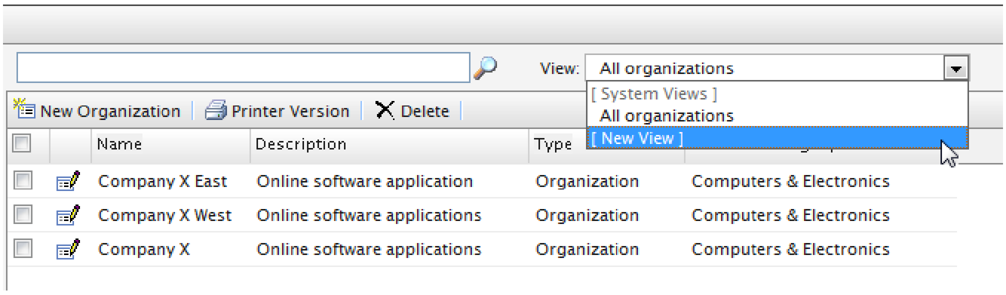
You can also use the search field on top of the **Organization List** to find specific organizations by name. To conduct a search, enter your search terms and click on the **Search** button. To conduct a new search, click on the **Reset** button to reset the form and enter new search terms.

Customizing views for browsing organizations

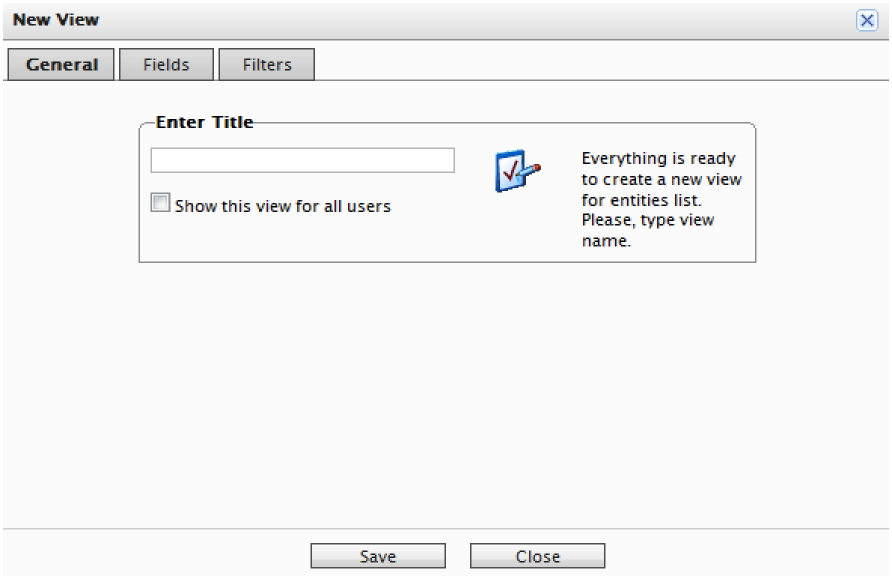
As an **Organization List** gets longer, you can create and customize views to filter the list. You define the columns you want to be displayed for the view, and the filters to be applied when selecting what to include in the view.

Do the following to create a new organization view:

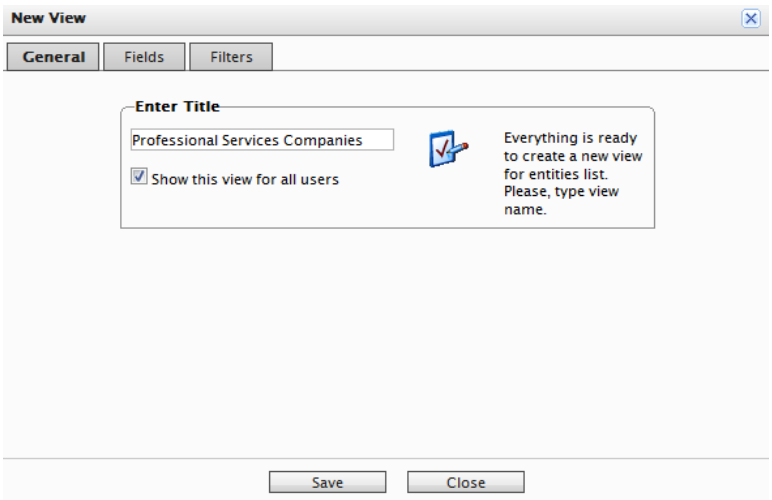
1. Click on the **View** drop-down menu and select "New View."



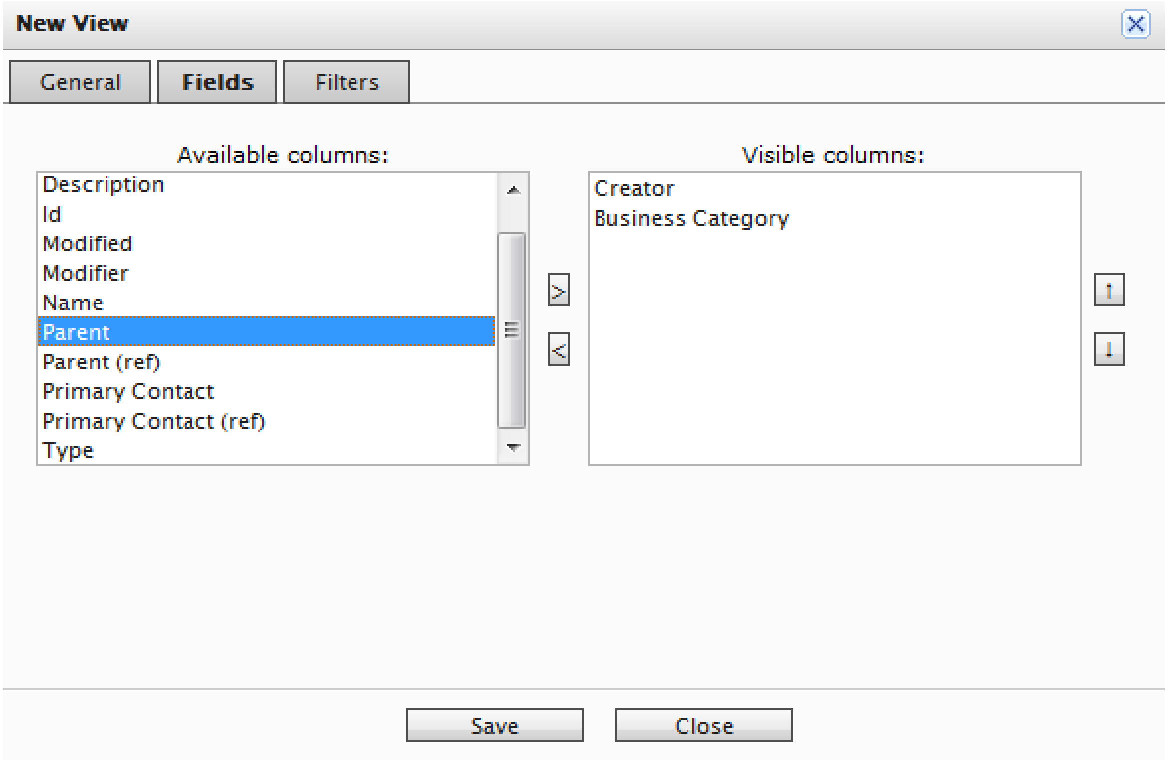
2. The **New View** dialog is displayed.



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.

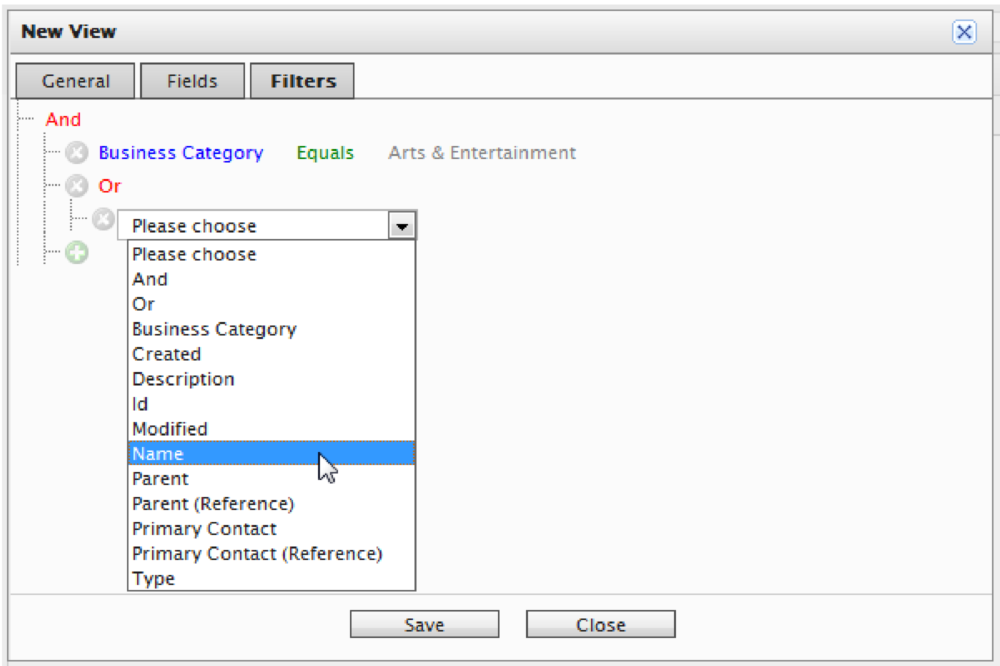


4. Click on the **Fields** tab to select which columns you want to appear in the custom view. Under **Available columns**, select the columns you want to appear by clicking and highlighting the column name and moving it over to the **Visible columns** list by clicking on the **Right Arrow** icon.



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.

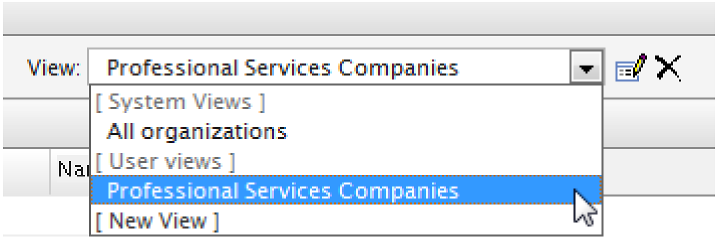
5. Click on the **Filters** tab to set the view filters. Clicking the **+** icon allows you add an additional filter.



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

Applying a view

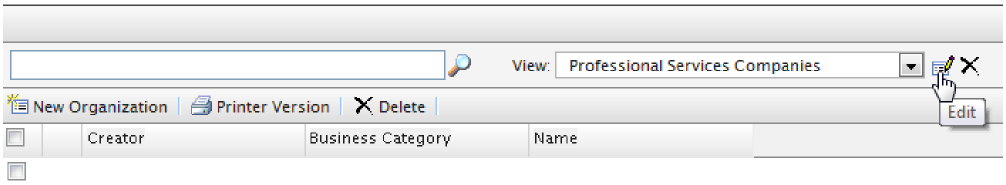
Once a View is created and saved, it appears in the **View** drop-down box.



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.

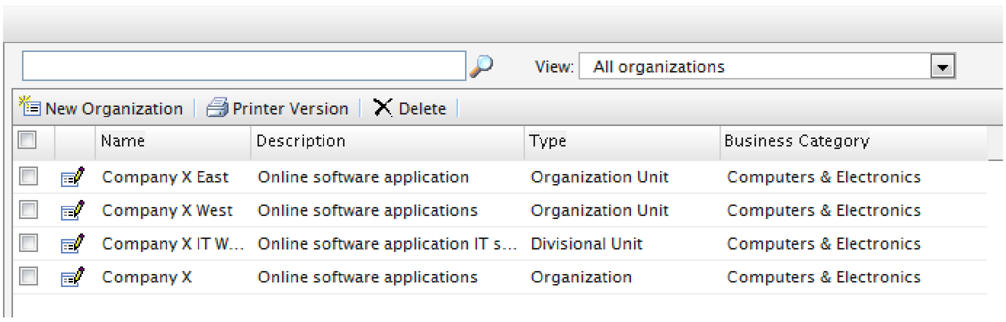


To **delete** a custom View, click on the **X** icon next to the **Edit** icon.

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

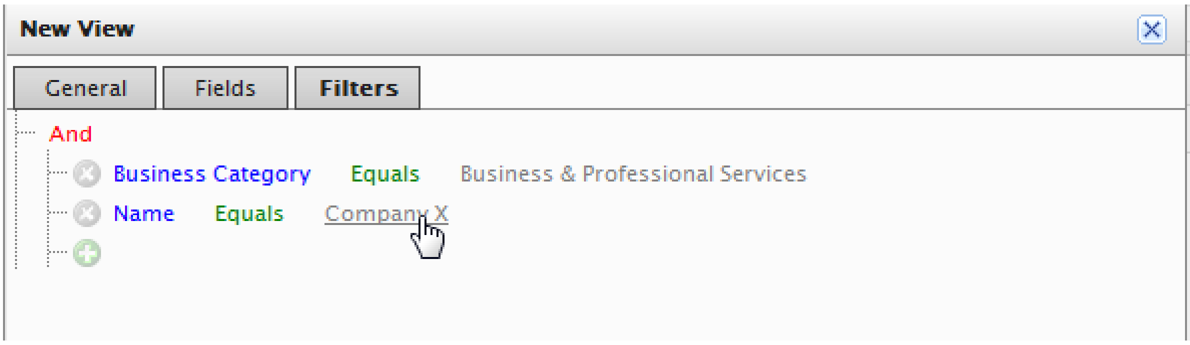
Customized view example

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."

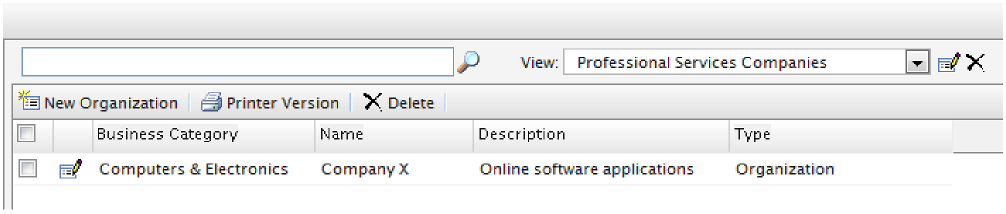


1. Click on the **+** icon and from the drop-down select "Business Category." Two fields, which default to "Equals" and "Arts & Entertainment," automatically appear. Click on "Equals" and a drop-down appears. Keep the field as "Equals." Click the field to the right of it and select a "Business Category"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

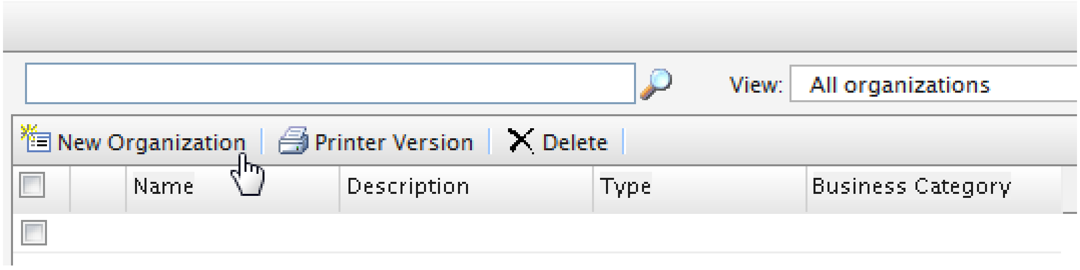
Creating organizations

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.

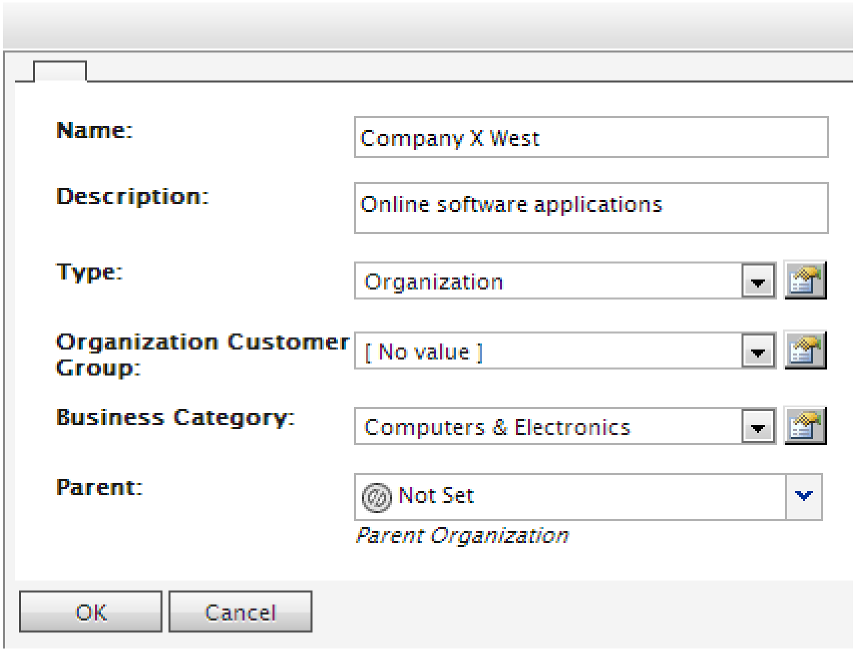
Creating an organization or organization unit

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.

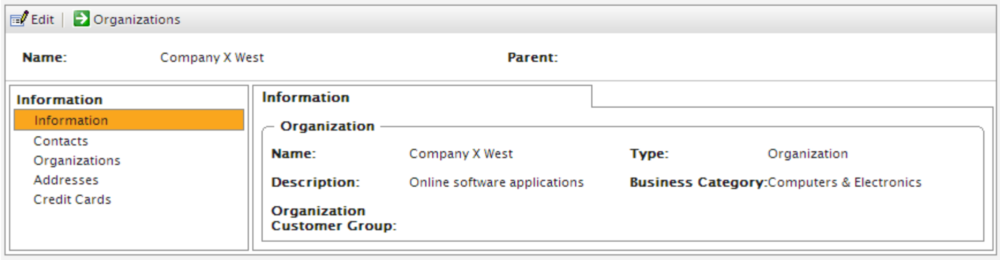


3. Enter data for the new organization, see below for available options.



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.
Organization Customer Group	Select a customer group to assign for the organization, this provides the possibility to apply pricing, discounts and personalization of content for this group.
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.
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...**

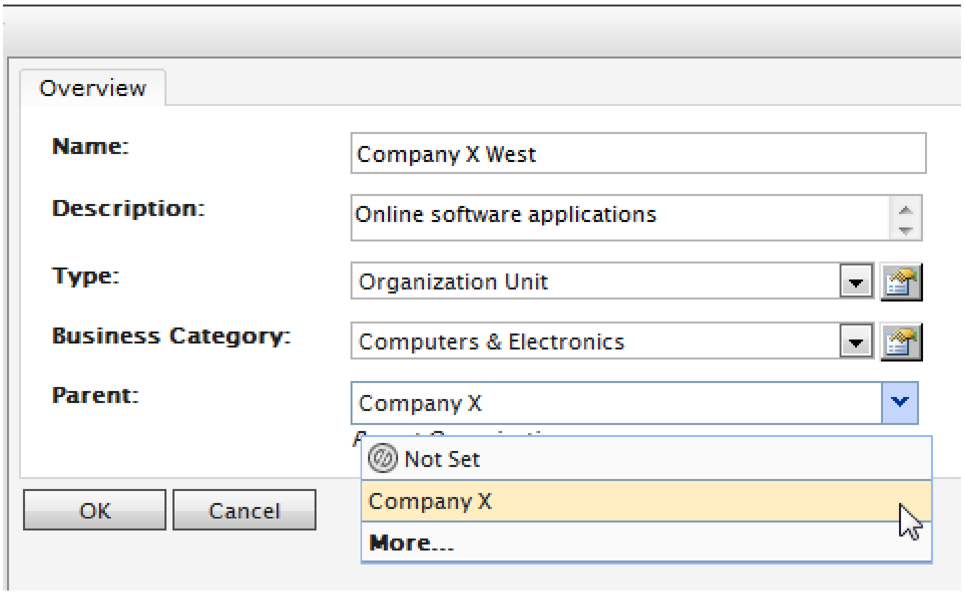
4. Save the organization by clicking **OK**. The **Organization Info** window of the organization appears. From here, you can view **Information** about the Organization you just created. Out of the box, you can also see associated **Contracts**, **Organizations**, **Addresses**, and **Credit Cards**.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



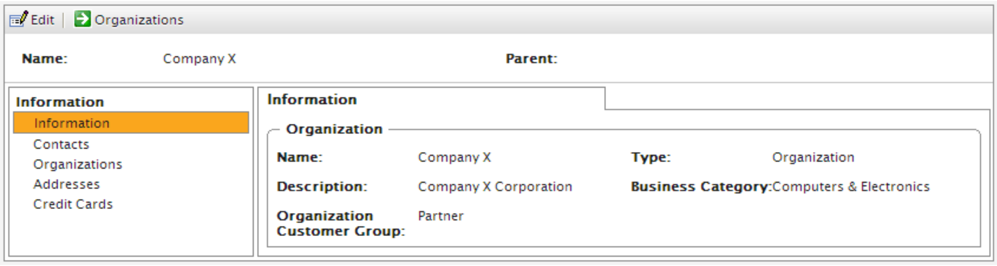
Creating an organizational hierarchy

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.



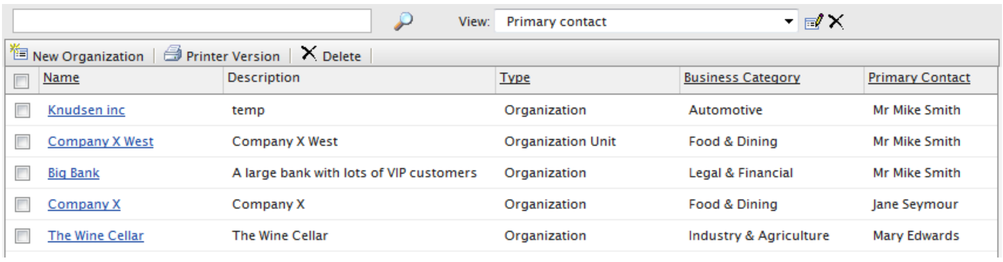
5. Repeat the steps above to create further organization units for the parent organization

Editing and deleting organizations

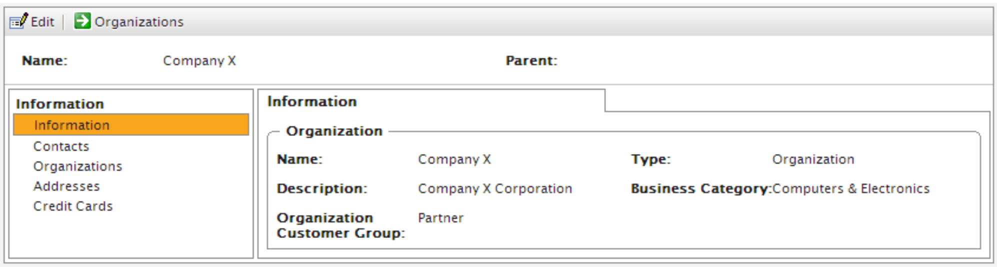
Editing organizations

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

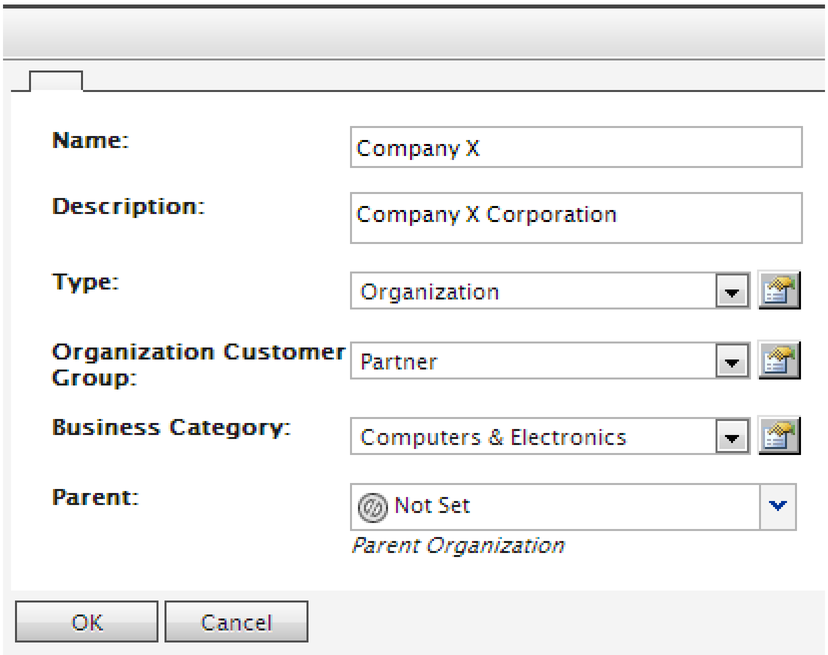
1. Go to **Customer Management** and **Organizations**. The **Organization List** page will be displayed.
2. Open an organization by clicking on it in the list.



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.

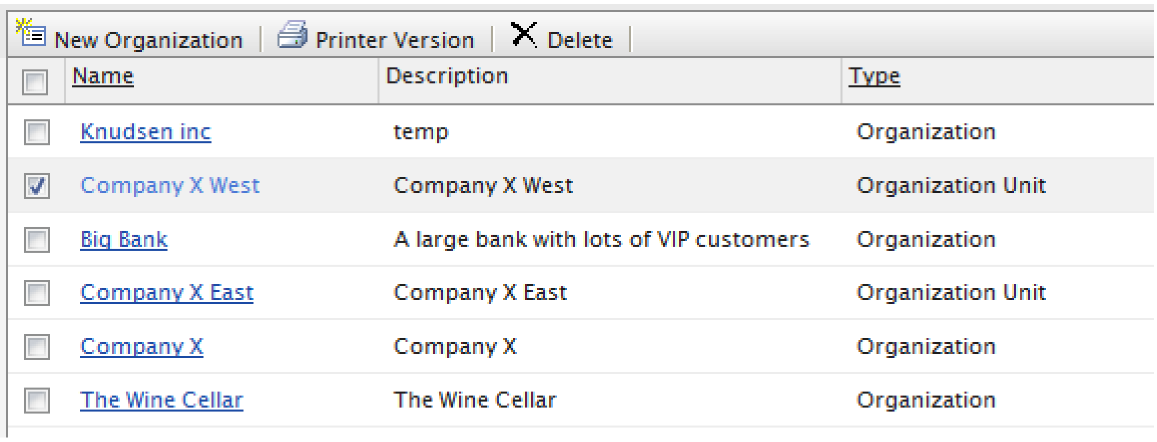


5. When you are done, click **OK** to save your changes.

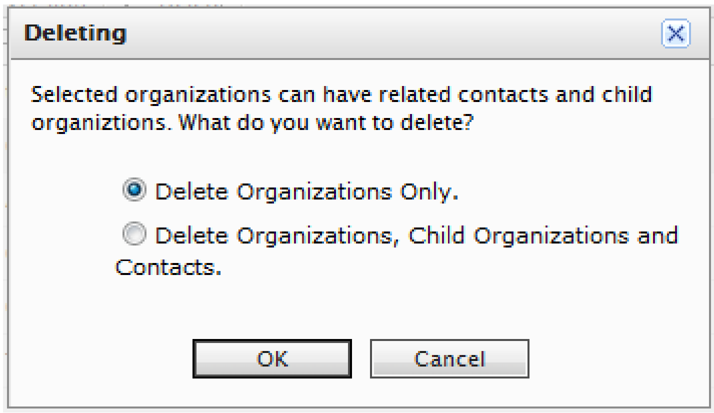
Deleting organizations

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*.



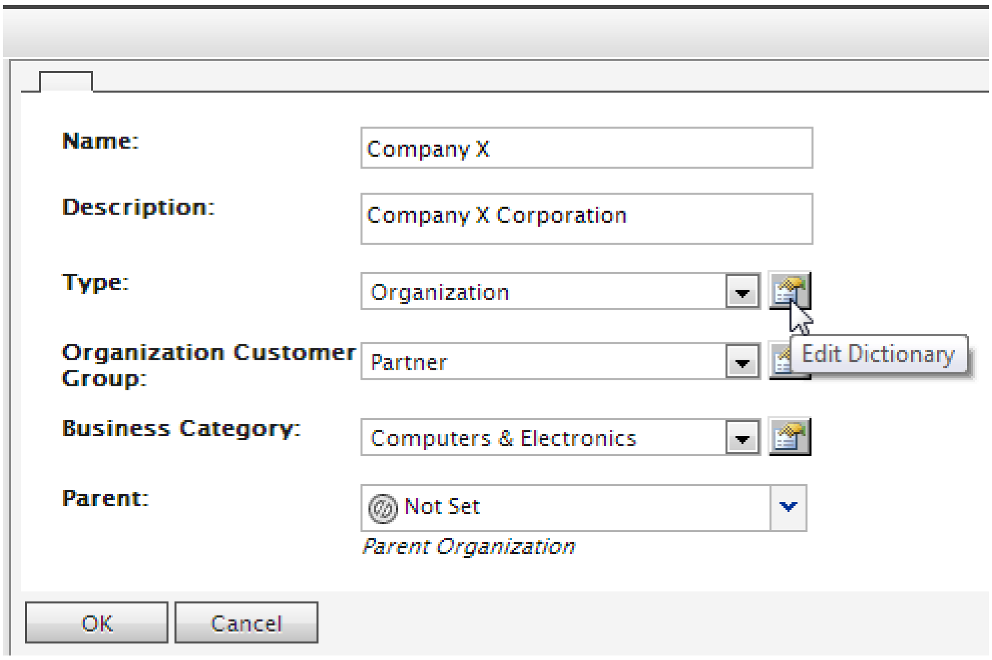
Select either **Delete Organizations Only** or **Delete Organizations, Child Organizations and Contacts** and click **OK** to complete the deletion.

Defining dictionary values for organizations

This section describes how to update dictionaries to create your own **organization types, organization customer groups** 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). An organization customer group can be for instance "Partner", and a business category can be an industry branch such as "Automotive" or "Food & Dining". This type of data is managed in so called **dictionaries**.

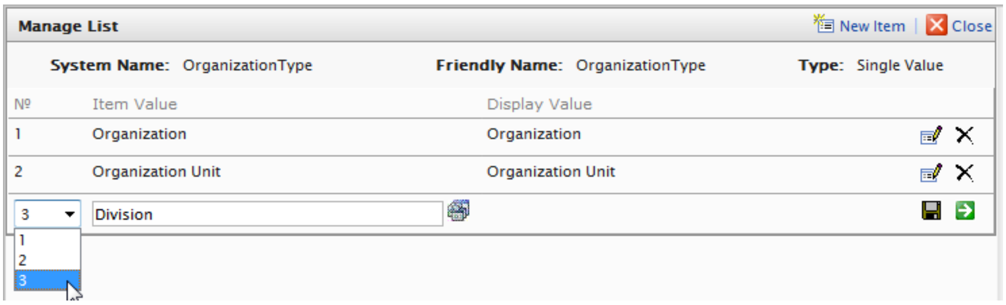
Creating, editing and deleting dictionary values for organizations

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

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 log in 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 can be assigned to **customer groups** and **organization customer groups**. These drives two areas in the system; the **selling prices** – price can be set for eligibility for a customer group and also for eligibility for **discount campaigns**. There is a priority to these; if there is a customer group assigned to an organization then this is used to drive pricing and campaign eligibility.

Contacts in an organization will be a member of that organization's customer group, even if the contact is assigned individually to a different customer group.

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

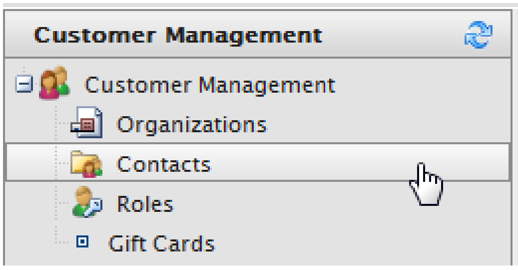
The work with contacts and accounts includes the following tasks:

- *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

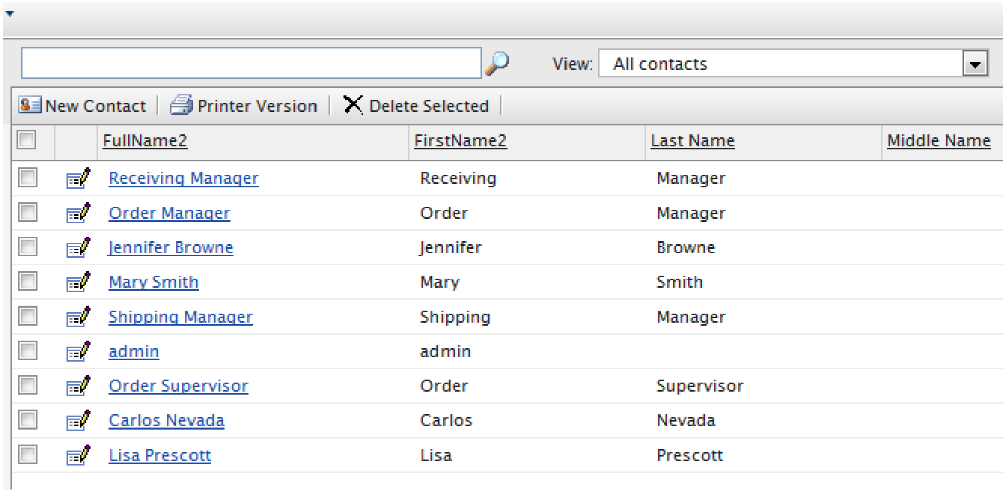
Browsing contacts

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

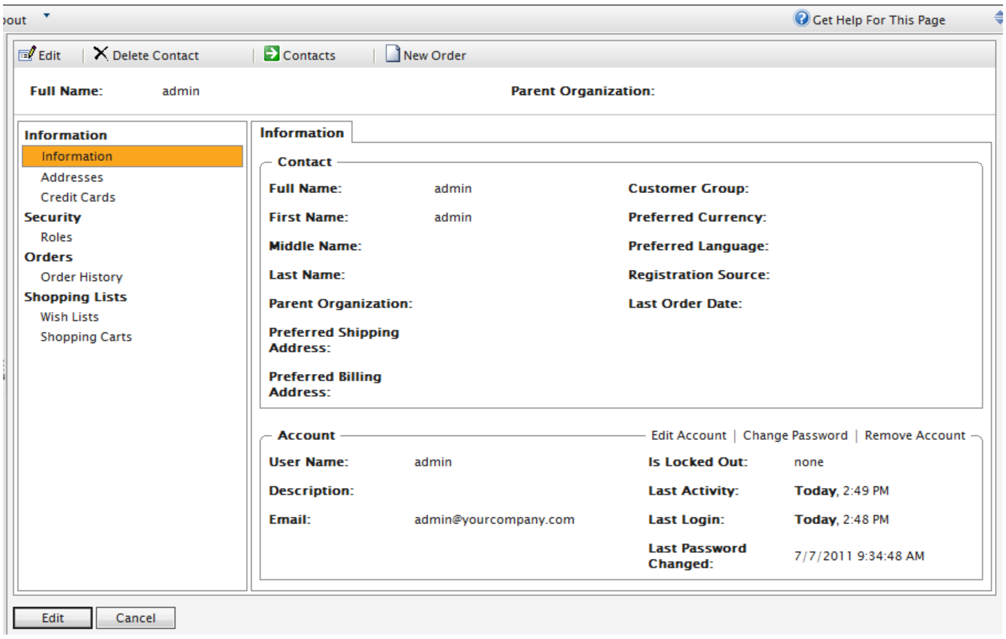


Viewing detailed contact information

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



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

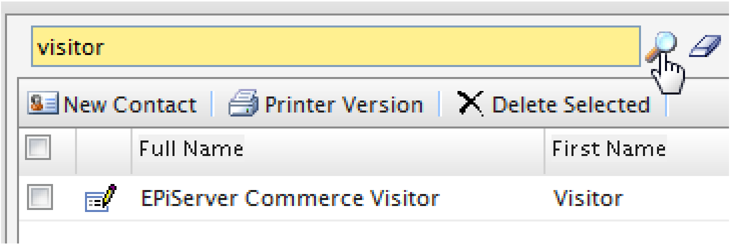


From within the **Contact Info** form, you can view other recorded information about the contact. For example, you can view **Addresses** and **Order History** related to this contact.

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.



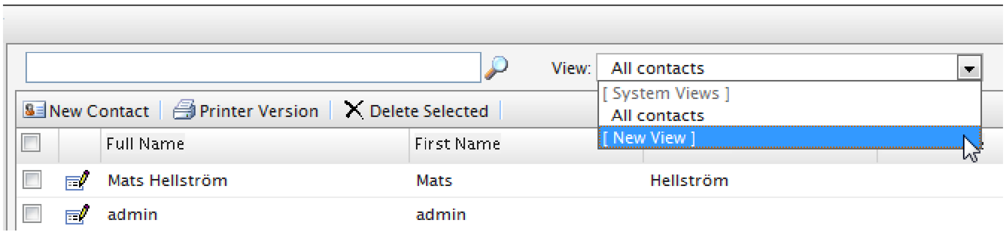
To clear the search and revert back to show all Contacts, click on the **Reset** icon (eraser) next to the search icon.

Customizing views for browsing contacts

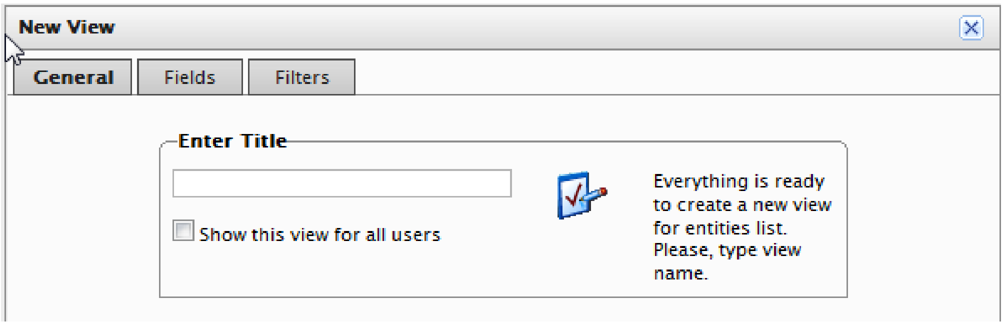
LIke Organizations, users can create or customize **Views** when browsing objects.

Creating a view

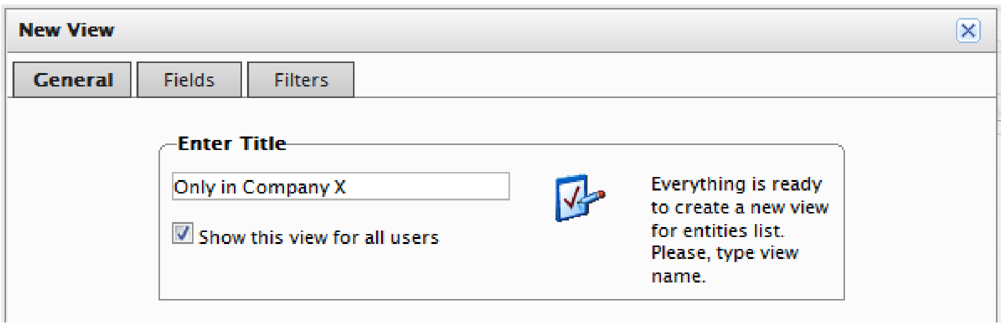
On the **Contact List** page, click on the **View** drop-down menu and select **New View**.



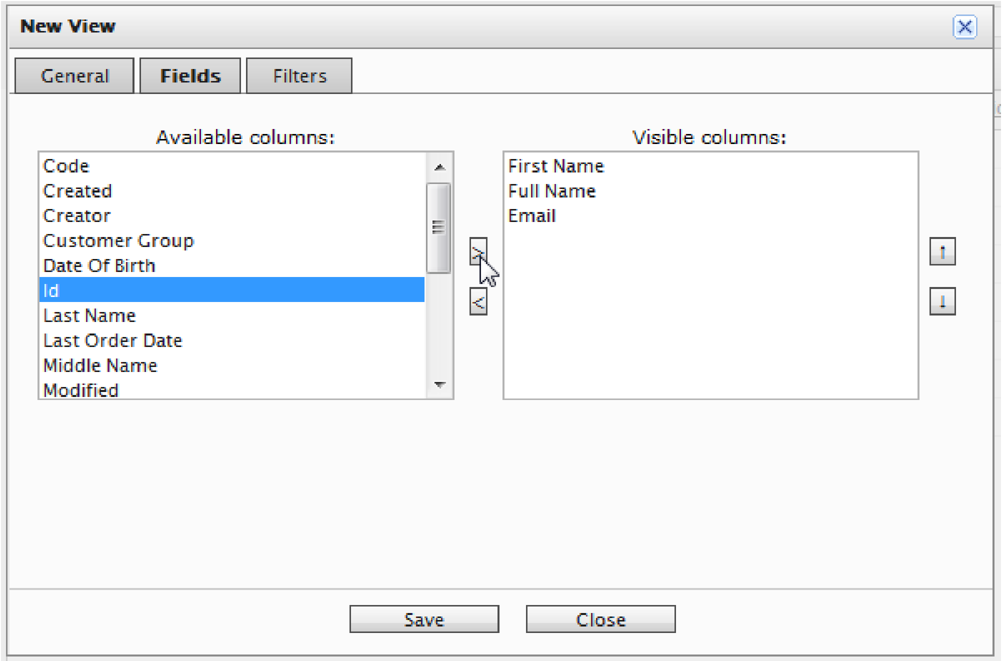
A pop-up appears, very similar to the one found in *Organizations*. This form gives users the ability to customize which columns appear and apply a variety of filters.



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.



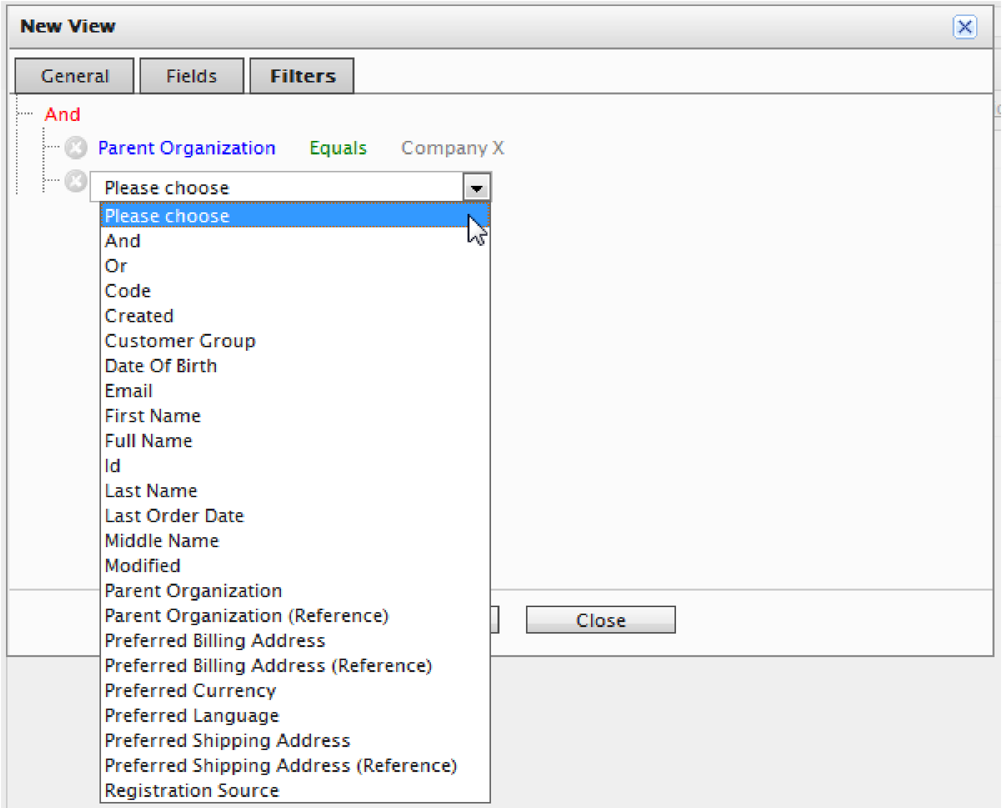
Click on the **Fields** tab to select which columns you want to appear in the custom View. Select the columns you want to have appear by clicking and highlighting the column name and moving it over to the **Visible columns** list by clicking on the **Right Arrow** icon.



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.

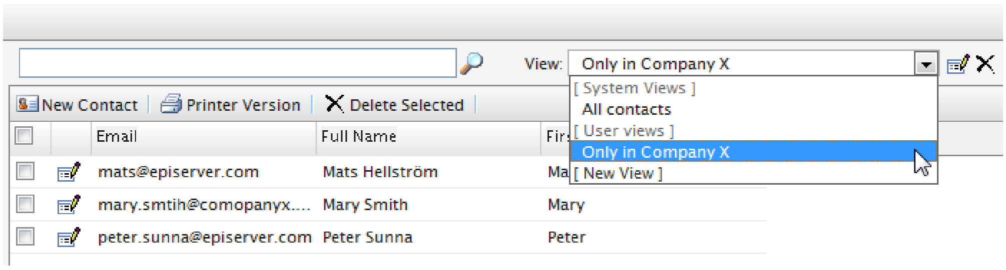
Click on the **Filters** tab to set the view filters. Users are given precise controls over filters for setting up rules for their custom View. Clicking on the **+** icon allows you add an additional filter.



There are a multitude of options available for customization.

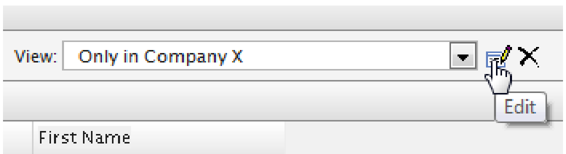
Applying and editing a view

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



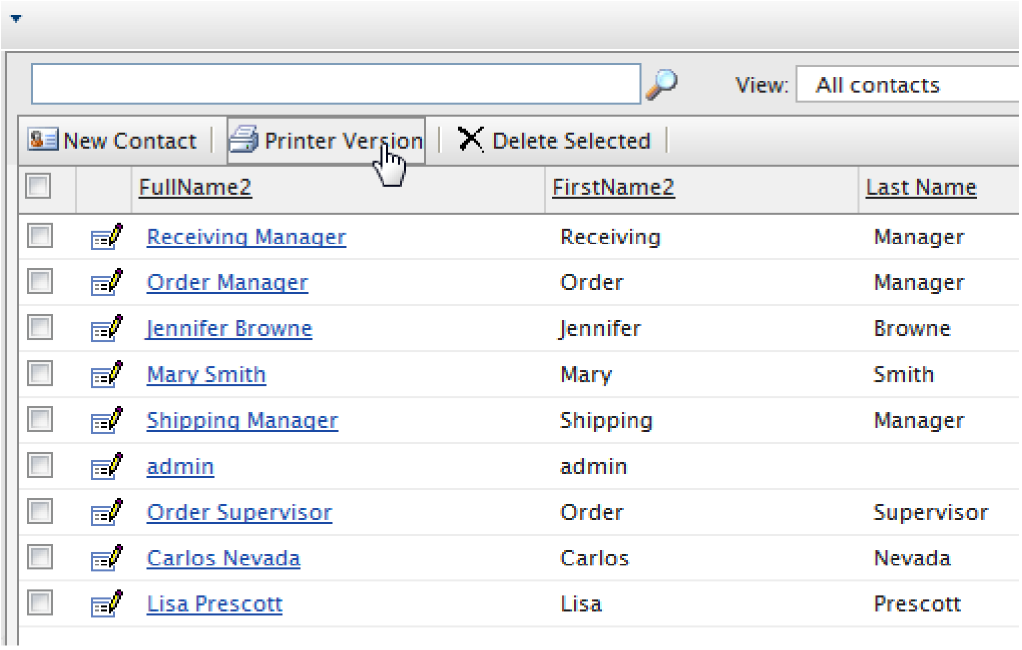
To apply the **View**, select it from the drop-down. Based on the columns and filters you applied for the custom View, your **Contact List** will reflect those options.

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.

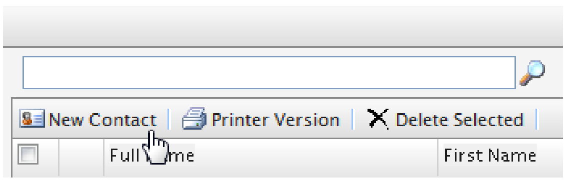
Contact

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

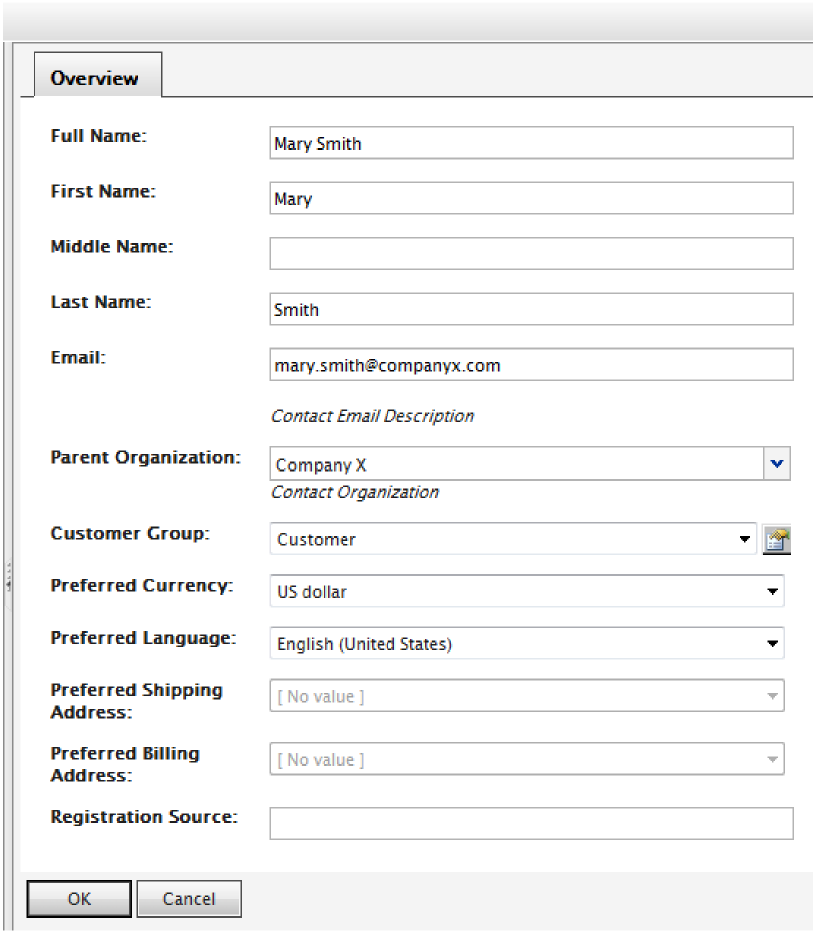
To create a new **Contact**, from the **Contact List** page, click on **New Contact**.



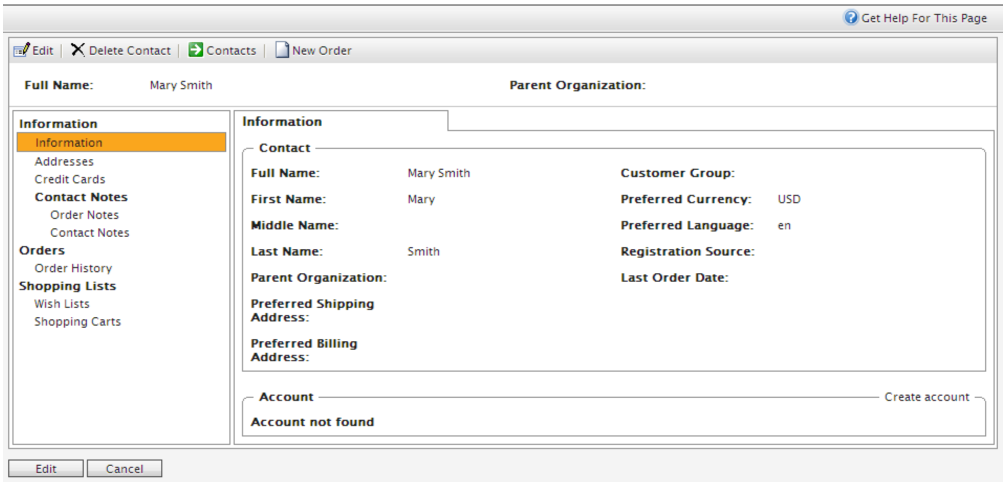
The **Contact Edit** page appears where you can enter all relevant information about the contact. The only required fields to complete are **Full Name**, **First Name**, **Last Name**, and **Email**. The rest of the fields are optional but are recommended.

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 for instance when setting specific permissions and targeted *Marketing campaigns*.
3. Select a **Preferred Currency** for the contact. If the contact is in France, you may want to associate the Euro currency. Available currency options are based on settings in **Administration > System Settings > Dictionaries > Currencies**.
4. Select a **Preferred Language** to associate with the contact. Languages are populated based on the languages set under **Administration > System Settings > Dictionaries > Languages**.
5. **Preferred Shipping** and **Billing addresses** are related to company accounts.
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 Information** form is displayed. From here you can enter additional information for the contact. Order history for the contact can be viewed, and you can add **notes** for both orders and the contact. The form can be customized using *Business Foundation*.



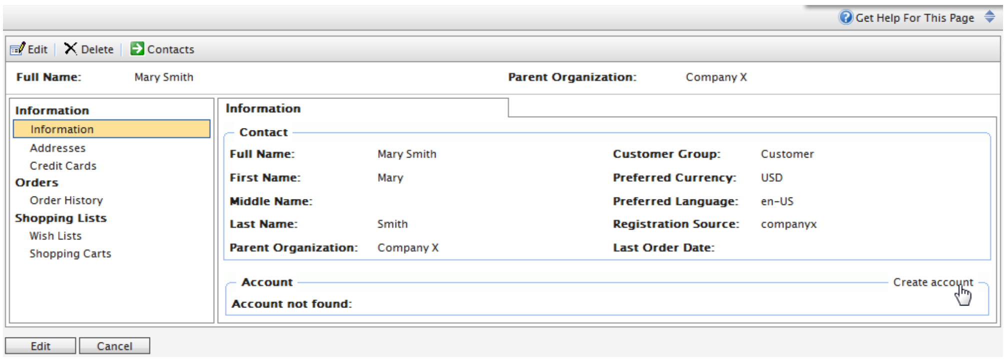
To go back to the Contact List, click **Cancel** or the **Contacts** button next to the **Right Arrow** icon.

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.

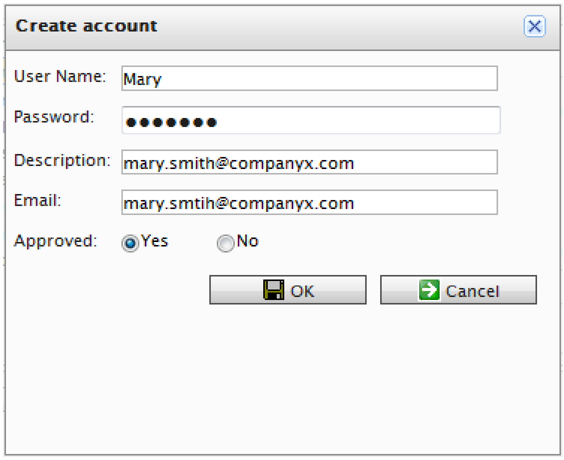
A customer account is automatically created for a customer who registers from the front-end public website, allowing them to log in and view personalized information.

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.

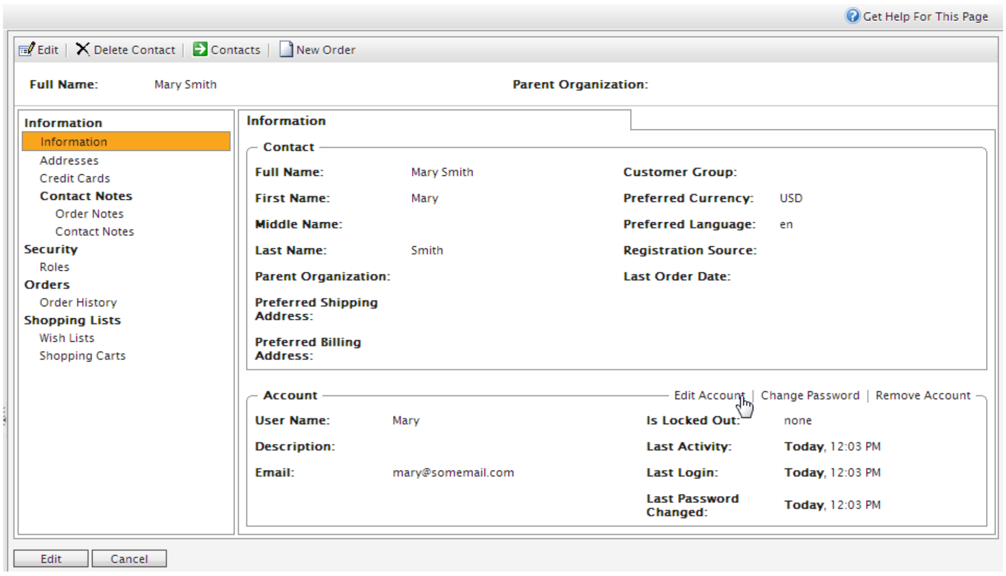
1. Enter in a **User Name**, which can include spaces and special characters.
2. Enter in a **Password**, which must be four or more characters.
3. Enter in a **Description** and **Email Address**, which are both optional.
4. To enable the account, select "Yes" under **Approved**. Otherwise, select "No" 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 log in attempts.
- **Last Log in** - 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.

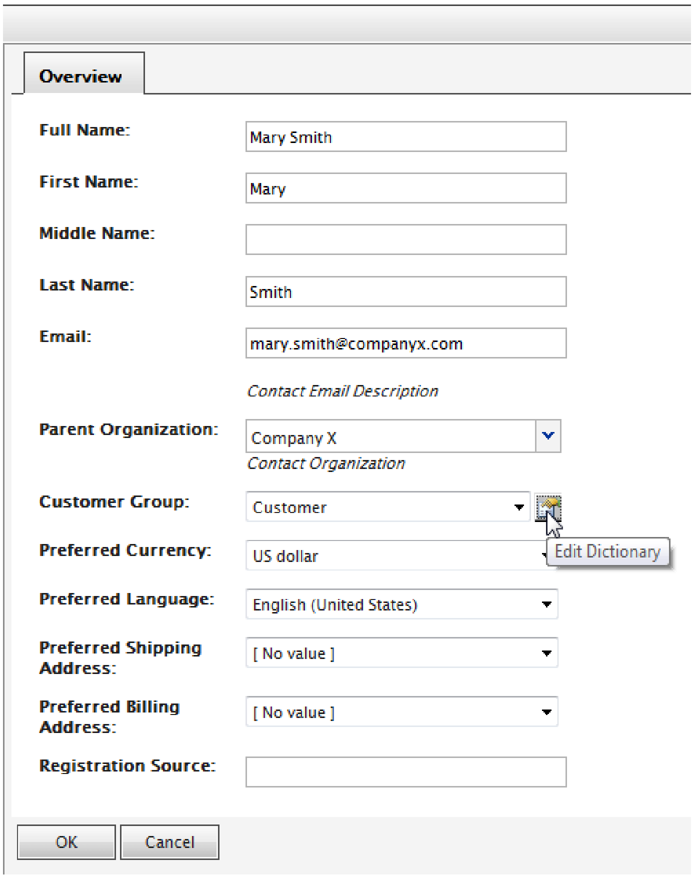
Defining dictionary values for contacts

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**.

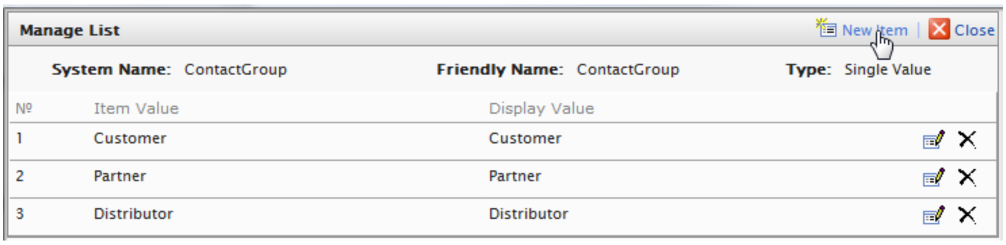
Customer groups can be used for instance when *defining specific pricing* or *restricting promotions*.

Creating and editing dictionary values for 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

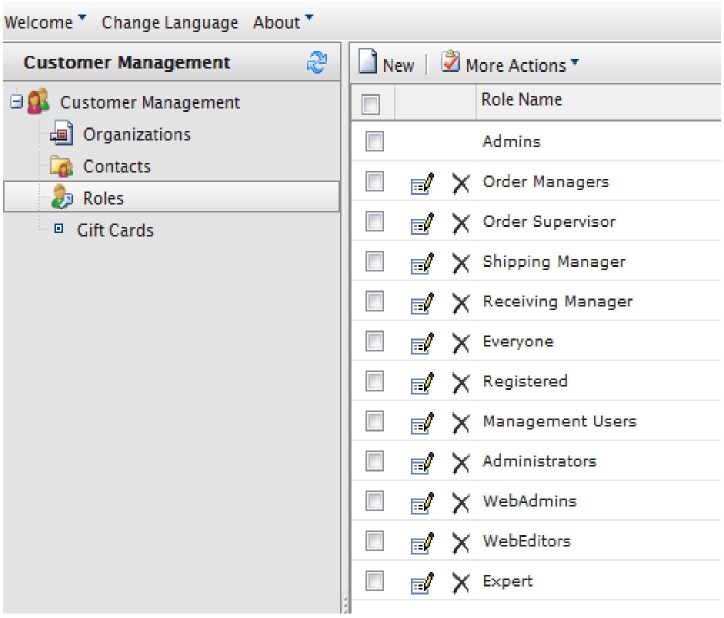
Roles are used for managing **permissions** for different groups of users. Out-of-the-box, EPiServer Commerce includes a list of predefined roles that can be assigned to user accounts.

- **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.

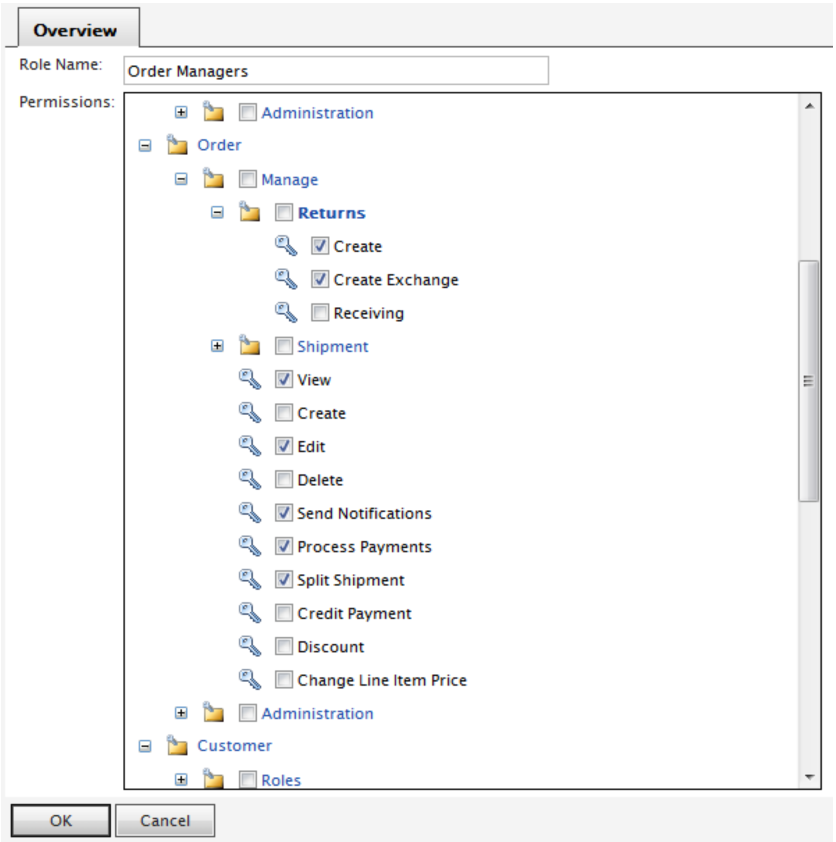
Users can also create their own roles based on a set of permissions. Roles allow administrators to restrict users from accessing different systems or folders depending on their needs. There is a wealth of permissions options administrators can set for a role, and each role area has specific areas that 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.

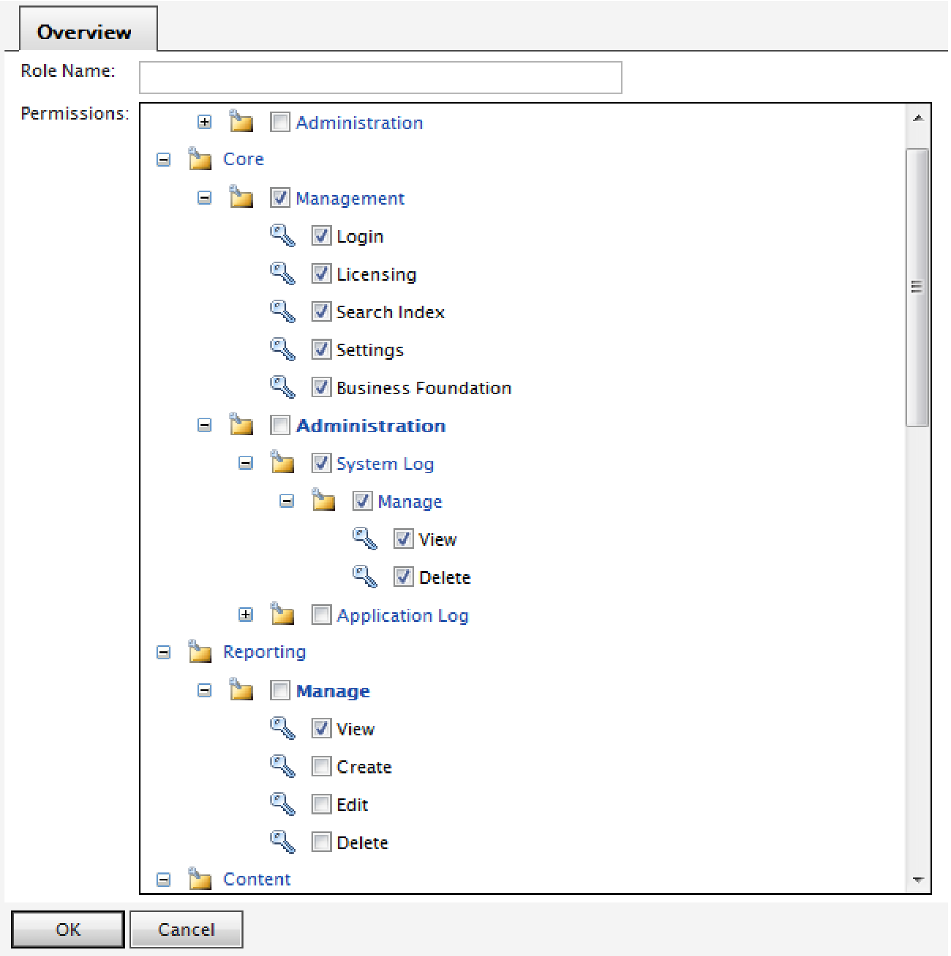


Each role has a series of defined **permissions** that can be set on a very detailed level. For instance, the **Order Managers** role can create returns and exchanges, and view. edit, send notifications, process payments and split shipments for orders.



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:

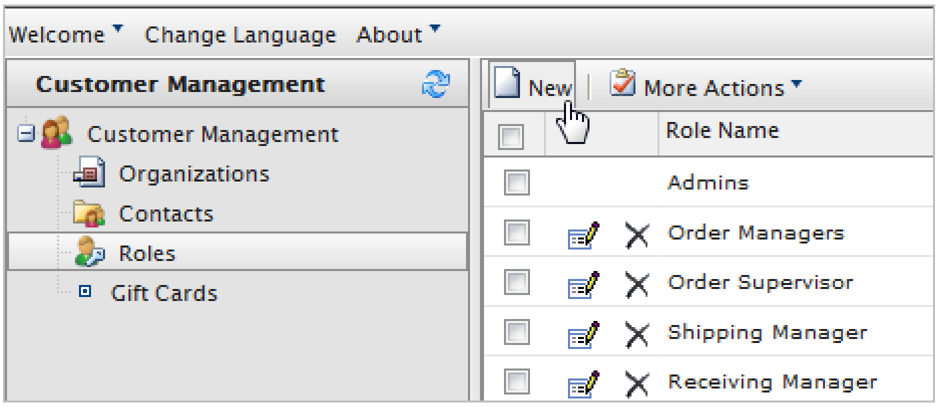
- *Creating, editing and deleting roles*
- *Assigning roles to individual accounts*

Creating, editing, and deleting roles

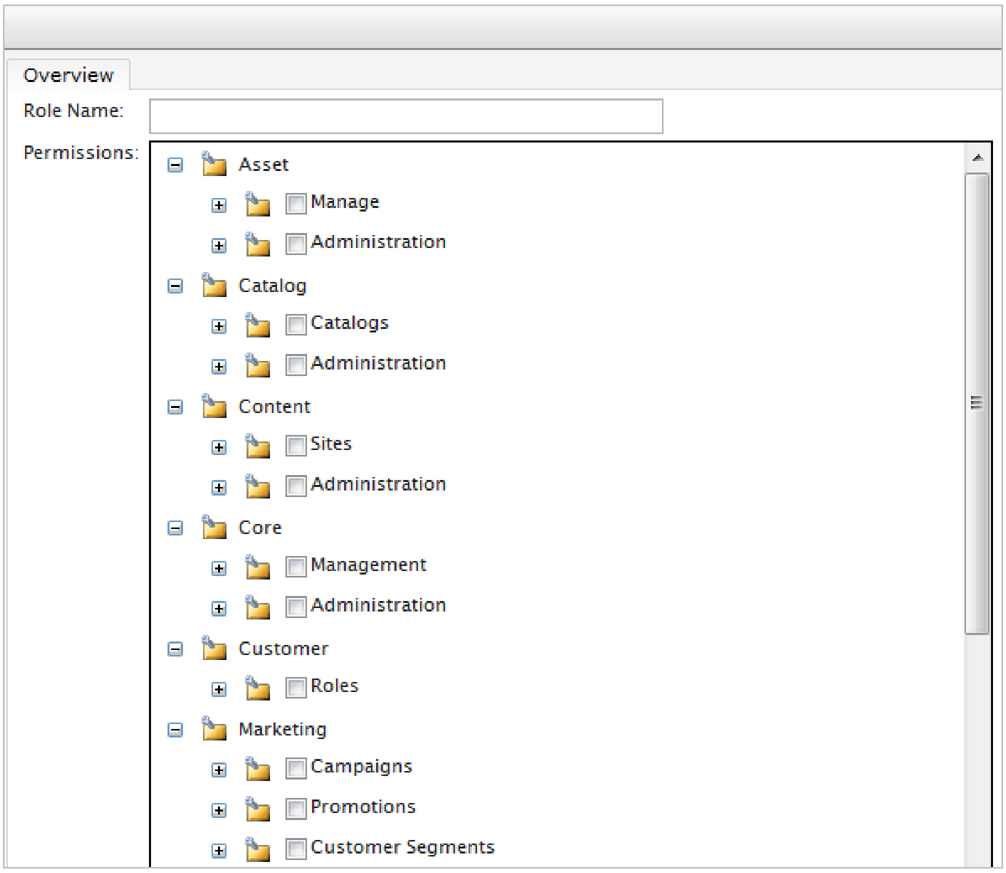
Out of the box, Commerce Manager includes a list of pre-existing **Roles** that can be assigned to Accounts. Users can also create their own Roles based on a set of Permissions. Roles allow Administrators to restrict users from accessing different systems or folders depending on their needs.

Creating a role

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



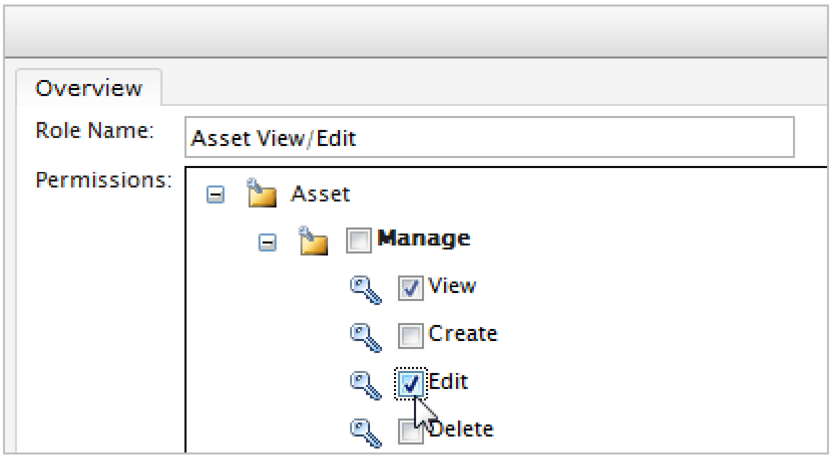
Click on **New** to open up the **Role Edit** page.



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**.

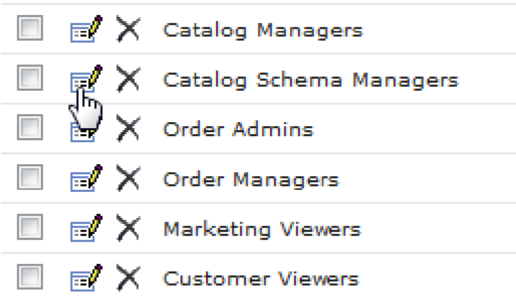


Once done defining the Role, click on **OK**. The new Role will appear on the **Role List**.

Editing 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.

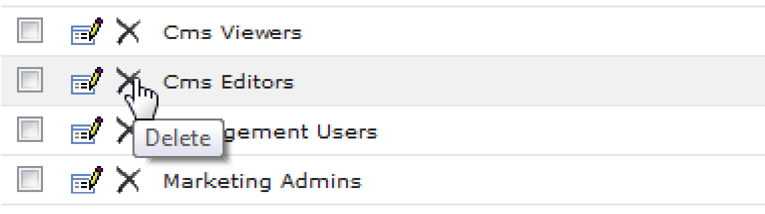


The **Role Edit** page appears. You can customize the Permissions settings for the Role. Once done, click **OK**.

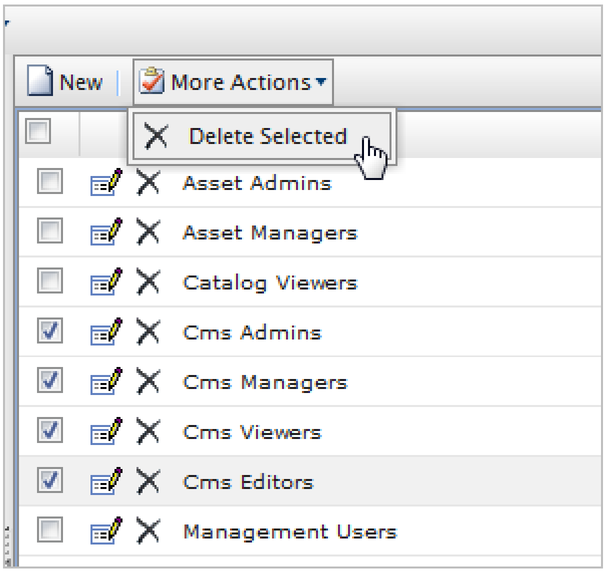
Deleting roles

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.

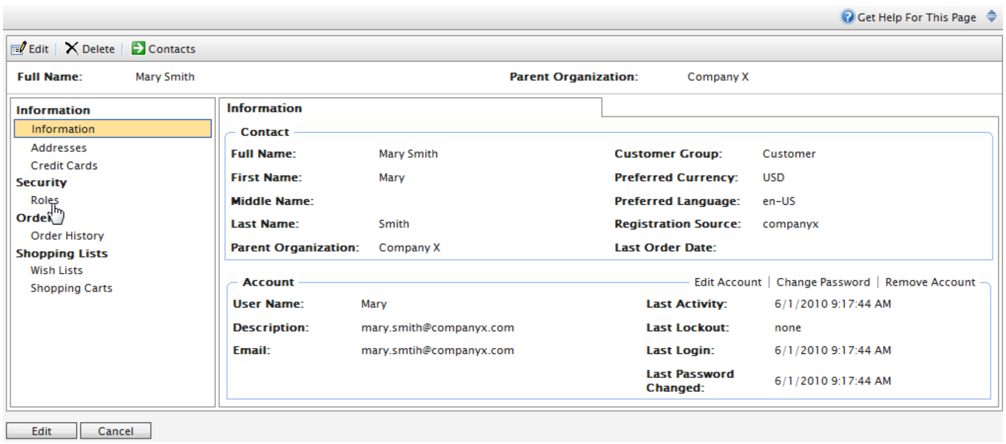


Assigning roles to individual accounts

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.

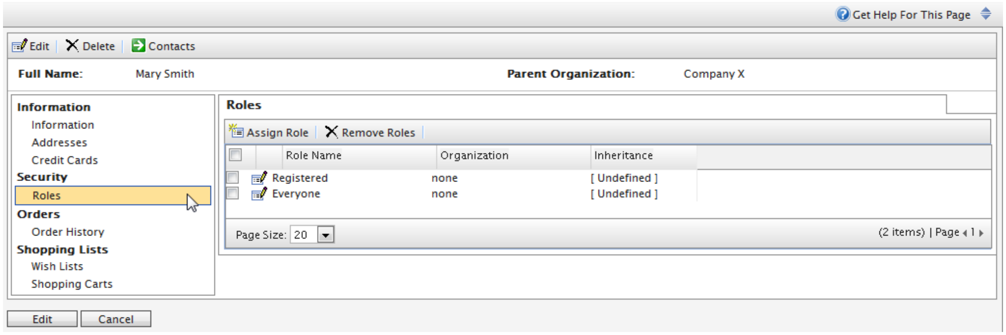
Assigning a role

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

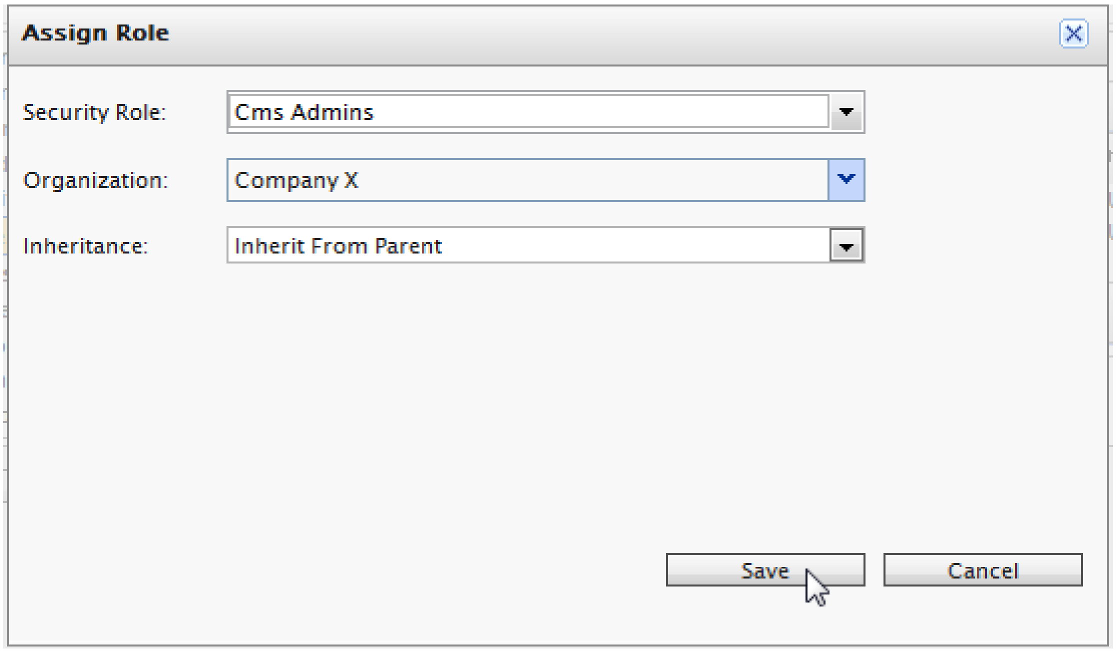


Under **Security**, click on **Roles**. The **Security** section only appears after an Account was created for the Contact.

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.



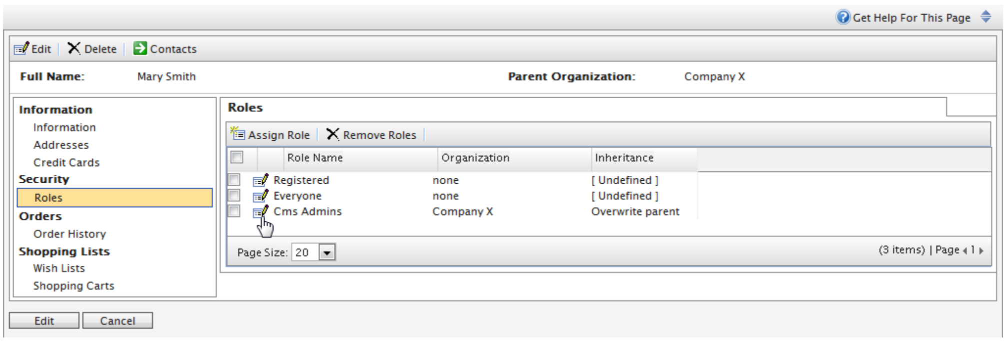
Click on **Assign Role** to assign a new Role to the Account. A pop-up appears allowing you to assign a specific Role from the drop-down menu.



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

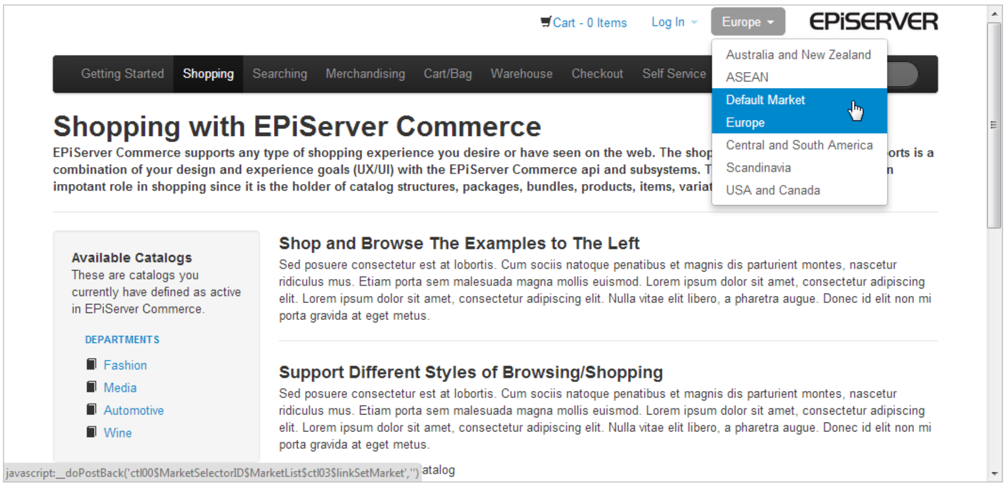
Optionally, you can assign an Organization to the Account, which enables the Inheritance drop-down menu below. If specific permissions are set for an Organization, you can set to "Inherit from Parent" (inherit permissions from the Parent organization) or "Overwrite parent."

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



Markets

The **market** concept is central in this area of e-commerce. A market can be a country or a set of countries, regions or specific customer groups, where you want to apply specific products, languages, currencies or promotions. You can define many markets, each with its own product catalog, language, currency, and promotions, to be used on a single-site. The market features opens up for targeted merchandising and a more personalized user experience.



Working with markets

Markets are *defined under **Market Management** in Commerce Manager*, for usage in other parts of the system. With the multiple market options, you can for instance customize which products to be displayed and *payment methods* to be used for a specific market. Furthermore, *reports* can be filtered per market by using the market definitions. Markets can also be used to *personalize content for targeted customer groups*.

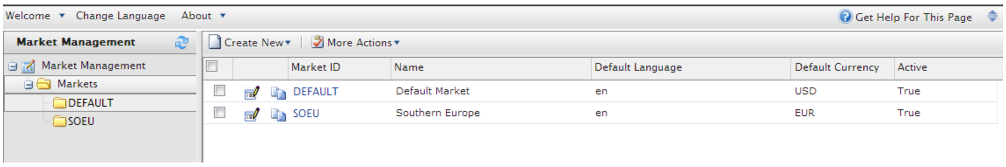
Refer to the developer documentation for EPiServer Commerce for more information on how to implement multiple markets.

Defining markets

This section describes how to define *markets* in EPiServer Commerce.

Browsing markets

To browse existing markets, go to **Market Management** and expand **Markets** in the left menu.



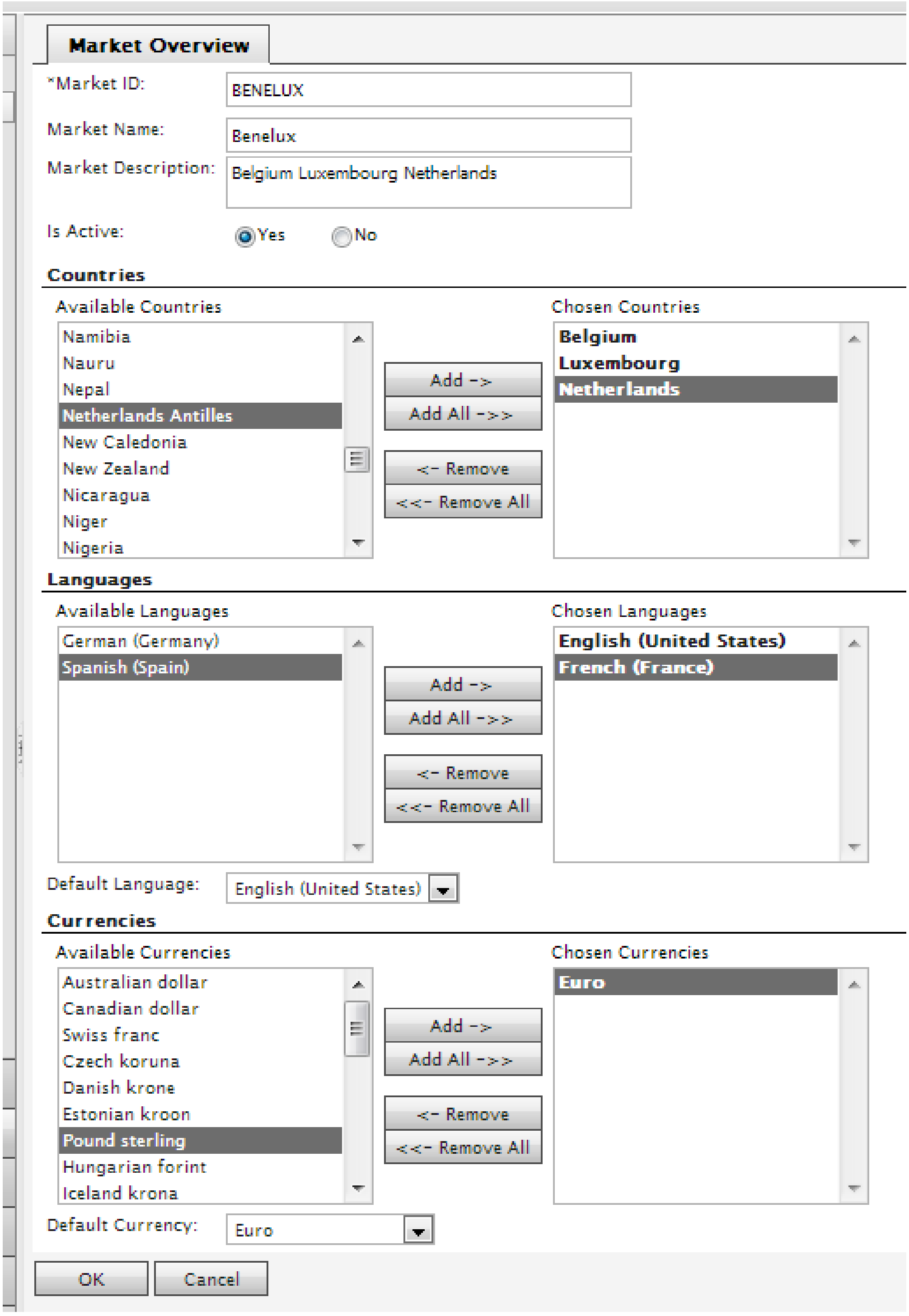
The market overview displays existing markets with their languages, currencies and status (active or not).

The **Default Market** will define the language and currency to be used as fallback for markets that have not been specified.

Creating a market

Do the following to create a new market definition:

1. Go to **Market Management**, select **Markets** in the left menu, then click **Create New** and **New Market**.
2. Enter data for the market. Add the **Market ID,** display **Market Name** and **Market Description**. Select **Yes** in the **Is Active** field to make the market available. Add **Countries**, **Languages** and **Currencies** for the markets. Ensure to add a **default** language and currency as fallback.



3. Save the market by clicking **OK**.

Editing an existing market

Go to **Market Management**, select **Markets** in the left menu to display the list of existing markets. Click the name of the market you want to update to open the **Market Edit** dialog. Make the changes and click **OK** to save.

Deleting a market

To browse markets, go to **Market Management** and expand **Markets** in the left menu. Select the check box next to the market you want to delete, select **More Actions** and **Delete Selected**. Confirm the deletion by clicking **OK**.

Marketing

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 features 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. Campaigns and promotions can also be targeted towards specific markets.

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

- **Campaigns** - a logical grouping of promotions and/or customer segments which will run over a specified period of time.
- **Customer segments** - a subset of customers or users of your website to whom you can target individual promotions or campaigns.
- **Promotions** - any sort of discount or coupon that can be applied to individual catalog entries, orders or shipping charges.
- **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:

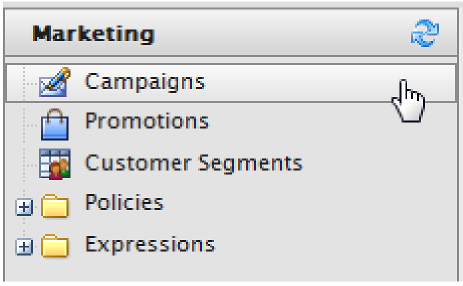
- Creating and managing *campaigns*, which can be targeted to specific groups of users.
- Configuring *customer segments* used for targeting of promotions to specific groups of users and customers.
- Creating different types of *promotions* with discounts and coupons.
- Configuring *expressions* and *policies* for defining additional rules and promotion types.

Campaigns

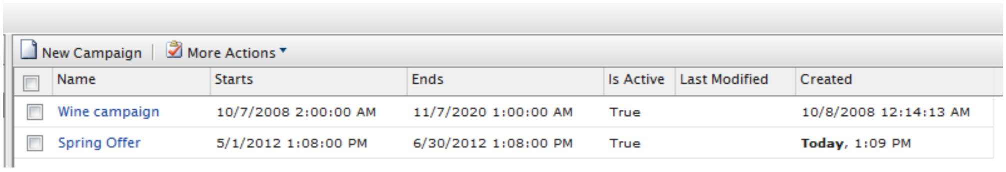
Campaigns are the first step to deploying targeted marketing efforts on your e-commerce website, and provide a way to organize marketing activities. Campaigns must be associated with *promotions* in order to provide customer discounts. Optionally, campaigns can also be tied to *customer segments* for targeted marketing purposes. For example, you can create a seasonal campaign that will include different promotions targeted for the spring season. Campaigns and promotions can also be restricted to specific *markets* to serve local needs without discounting a product world-wide.

Browsing campaigns

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

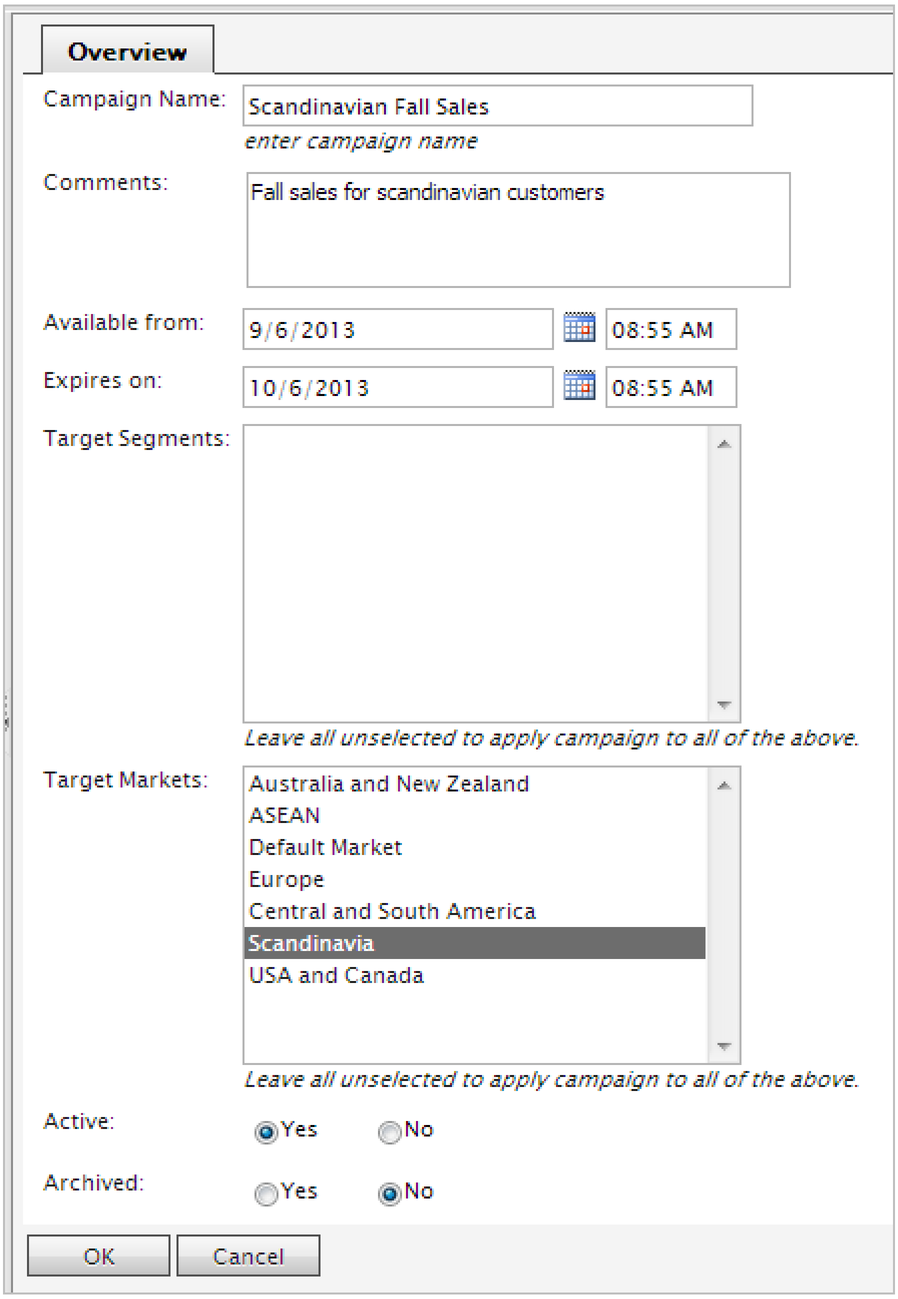


From the **Campaign List**, you can view existing campaigns.


New Campaign | More Actions

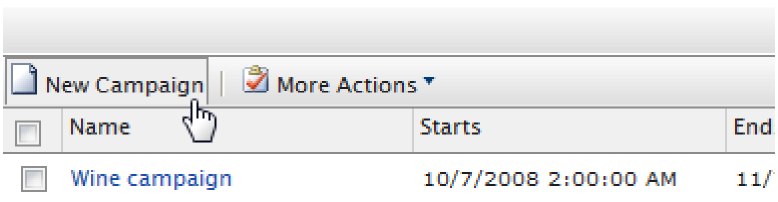
	Name	Starts	Ends	Is Active	Last Modified	Created
	Wine campaign	10/7/2008 2:00:00 AM	11/7/2020 1:00:00 AM	True		10/8/2008 12:14:13 AM
	Spring Offer	5/1/2012 1:08:00 PM	6/30/2012 1:08:00 PM	True		**Today**, 1:09 PM

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



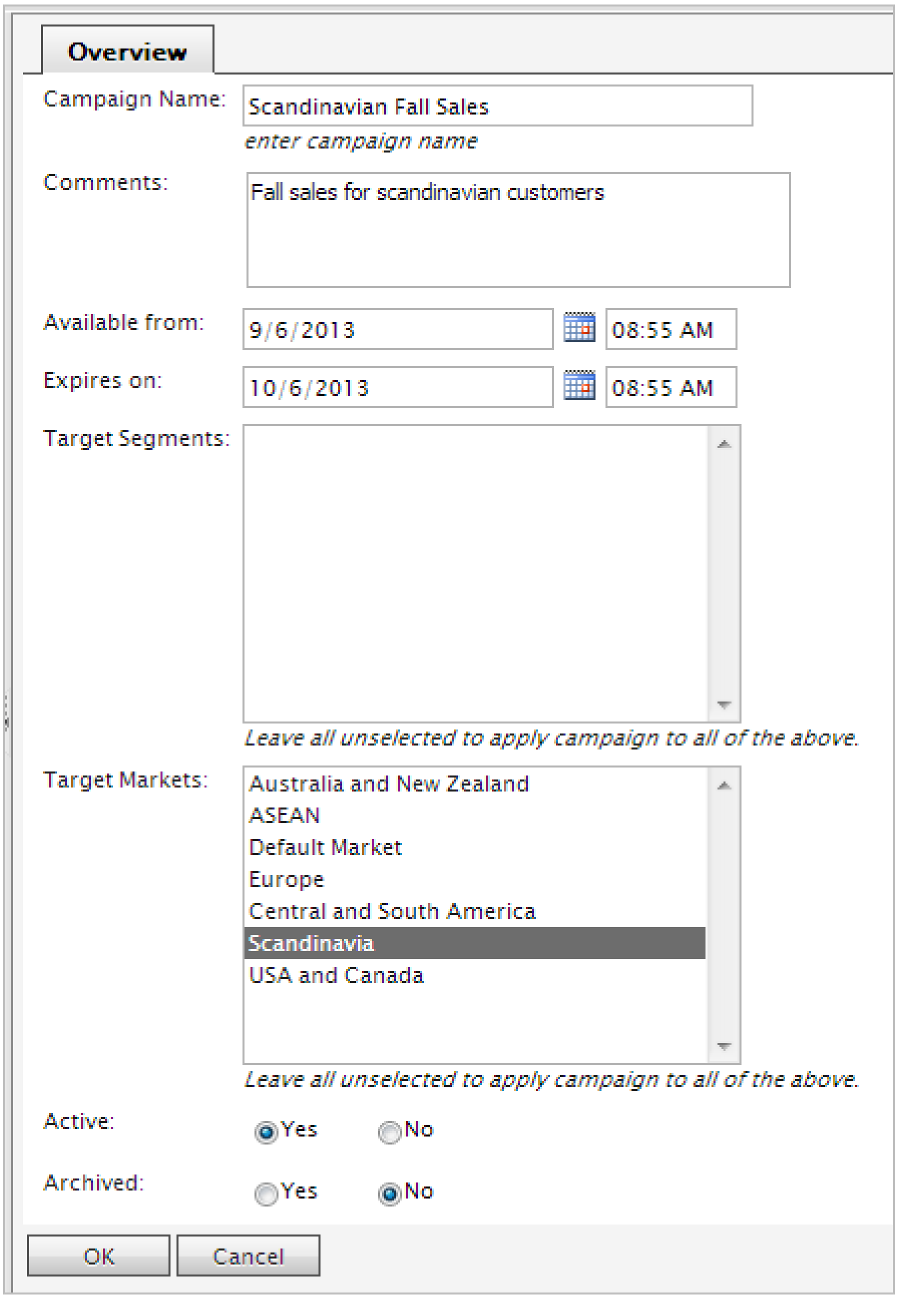
Creating campaigns

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.

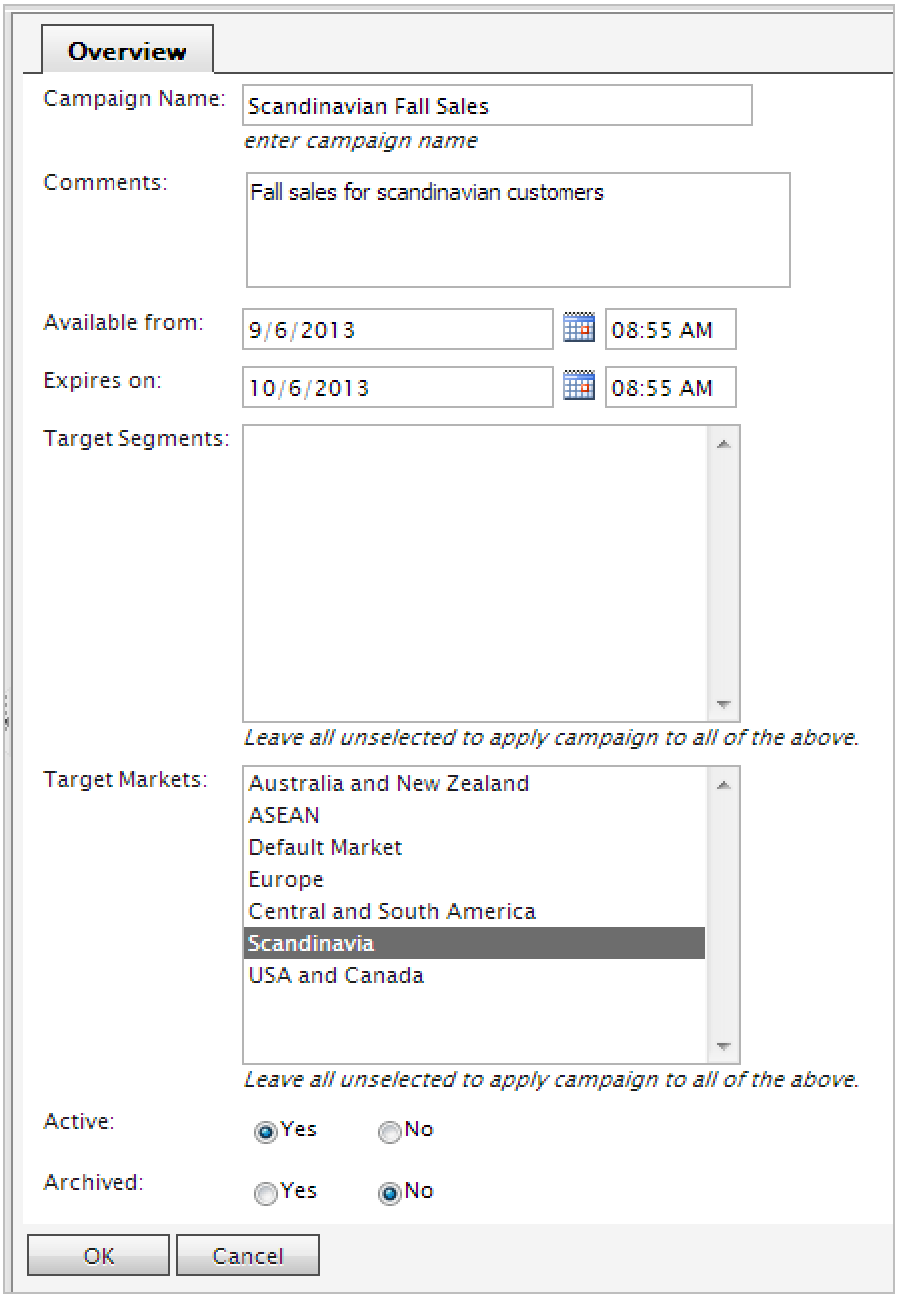
4. Enter a date directly (or click on the **Calendar** icon to select a date) and time into the **Available From** field. This will indicate when the Campaign is expected to start.
5. Enter a date and time in the **Expires On** field.
6. Select the **Target Segments** from the list. Segments are created under the *Customer segments* section.
7. Select the **Target Markets** from the list. Markets are defined under the *Defining markets* section.
8. Indicate whether or not the Campaign is **Active**, "Yes" or "No."
9. 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.
10. When done, click **OK**.



Editing and deleting campaigns

Editing a campaign

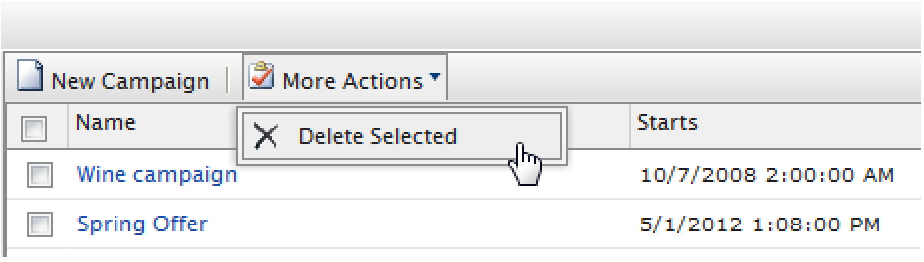
To edit an existing campaign, go to **Marketing** and **Campaigns** to expand the list of campaigns. Select a campaign to edit by clicking on the campaign name in the list.



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.



Customer segments

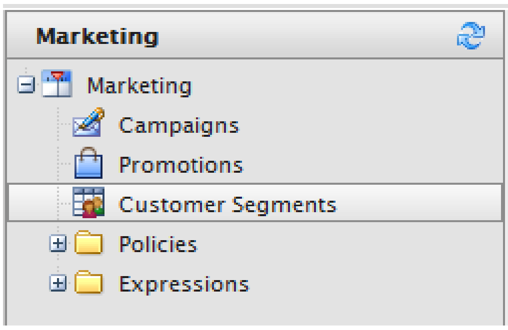
Customer Segments determine the **target audience** for *Promotions* or *Campaigns*. Within a campaign, all promotions will be applied to whatever customer segments associated with the same campaign. Members of the customer segments can be pre-defined in static groups or you can use *Expressions* to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

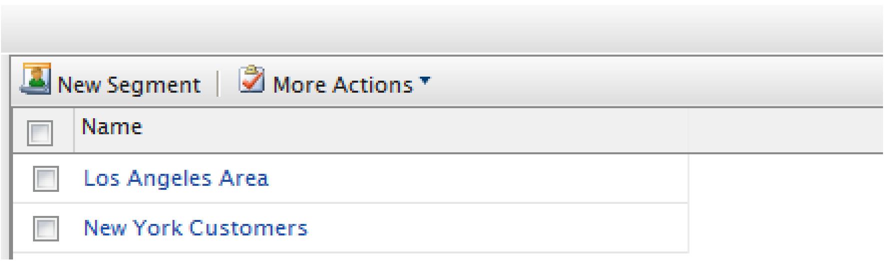
You can *create a customer segment* and manually assign specific contacts to the customer segment, or you can use conditions to apply rules that automatically make selected customers become part of the customer segment.

Browsing customer segments

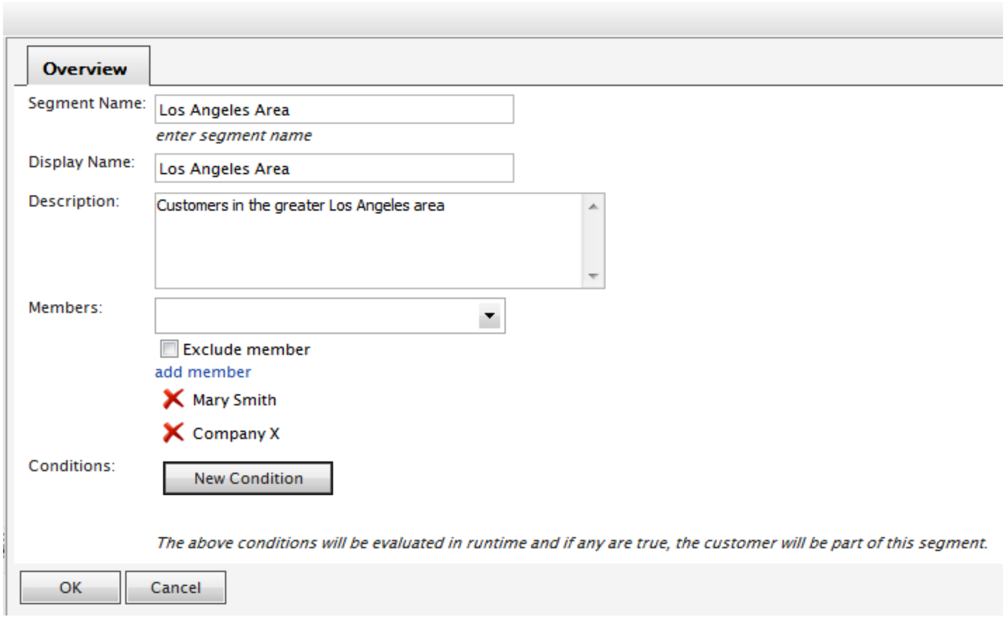
To view and browse customer segments, click on **Customer Segments** on the left navigation bar.



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.

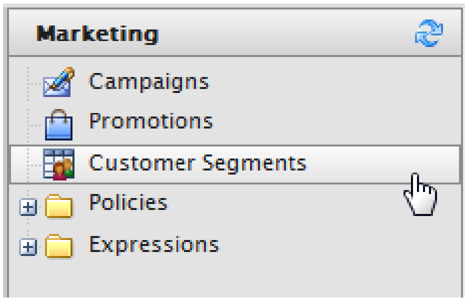


Creating customer segments

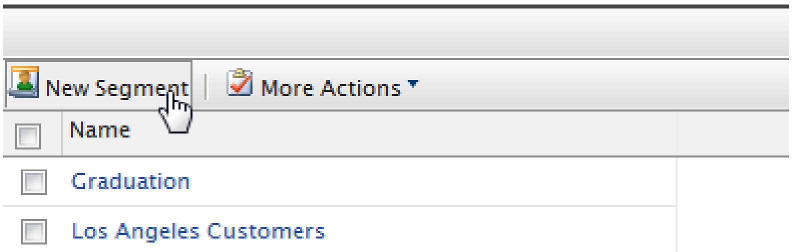
Customer Segments defines a specific groups of customers to be targeted by *Promotions* or *Campaigns*.

Creating a customer segment assigned to contacts

Go to **Marketing > Customer Segments**.



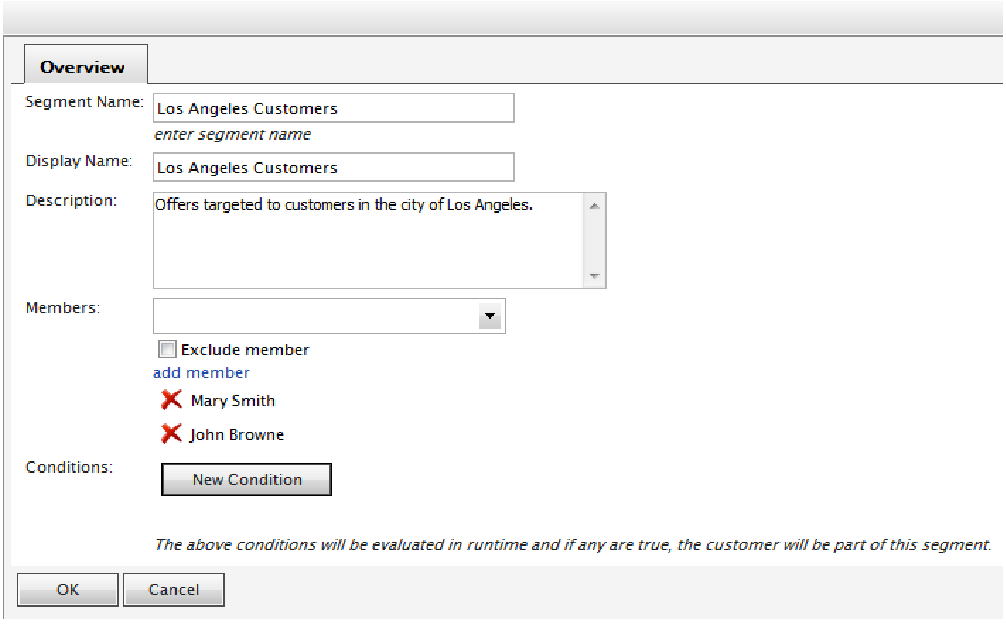
Click on **New Segment** on the menu bar to open the **Segment Edit** page.



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.



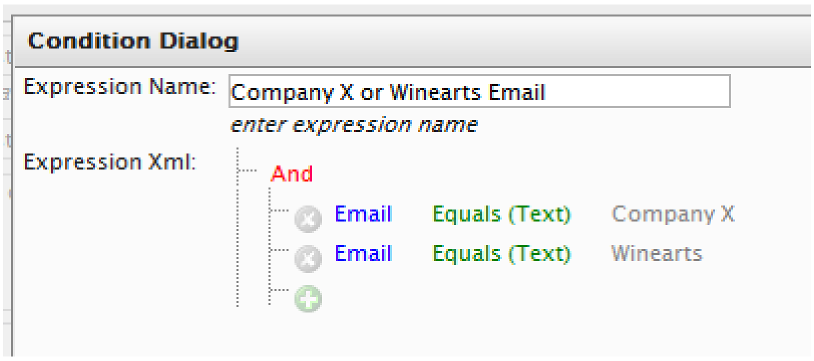
Creating a customer segment with conditions

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.

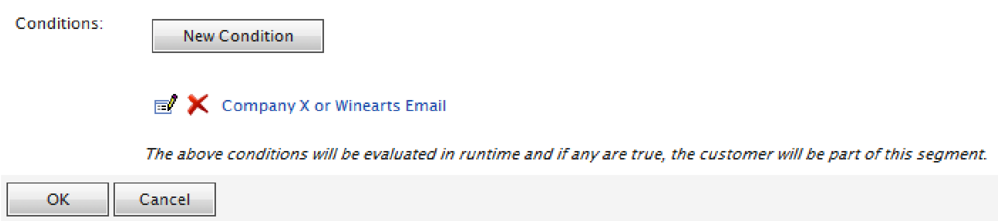
To add conditions to the customer segment, click on **New Condition** on the **Segment Edit** page. This example will show how to specify "Company X" or "Winearts" emails as part of this customer segment.

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

Setup the conditions based on the image below.



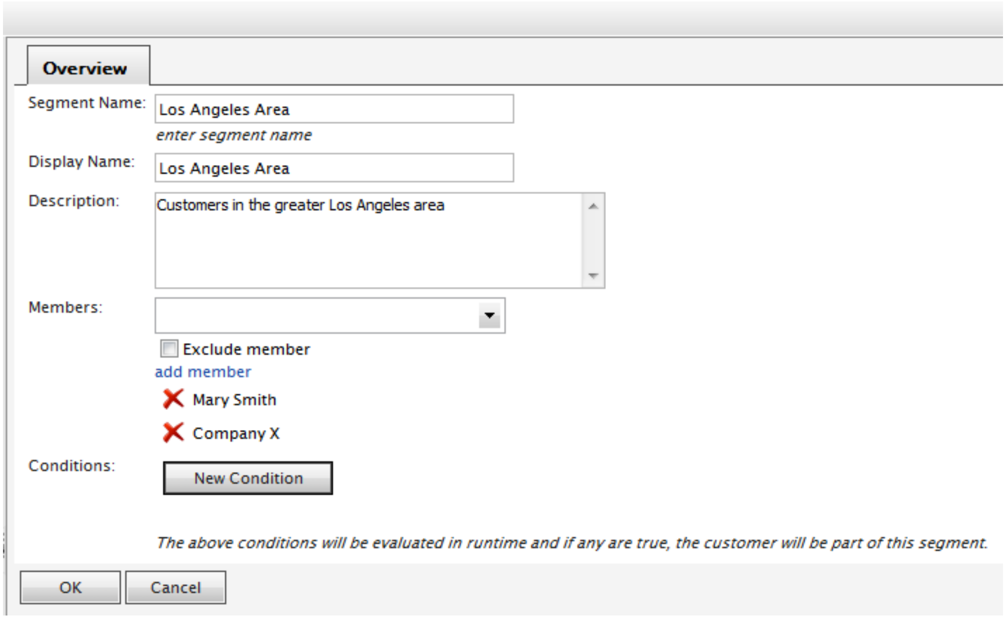
Click **OK** to save the Conditions.



Editing and deleting customer segments

Editing a customer segment

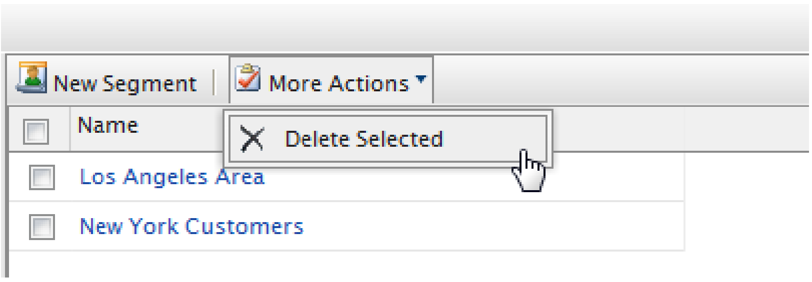
To edit an existing customer segment, go to **Marketing** and **Customer Segments** to expand the list of customer segments. Select a customer segment to edit by clicking on the customer segment name in the list.



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.



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, which means that you need to *create a campaign* before you can create a promotion. 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.

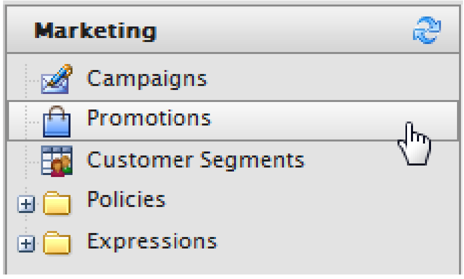
There are a number of built-in types of promotions that can be created and applied to individual **catalog entries**, **orders**, and **shipping**:

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

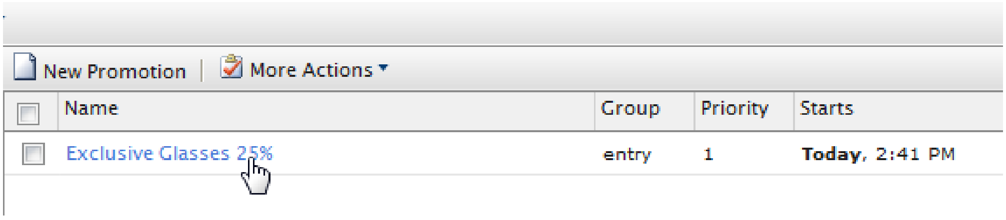
You can also build your own *custom promotions*.

Browsing promotions

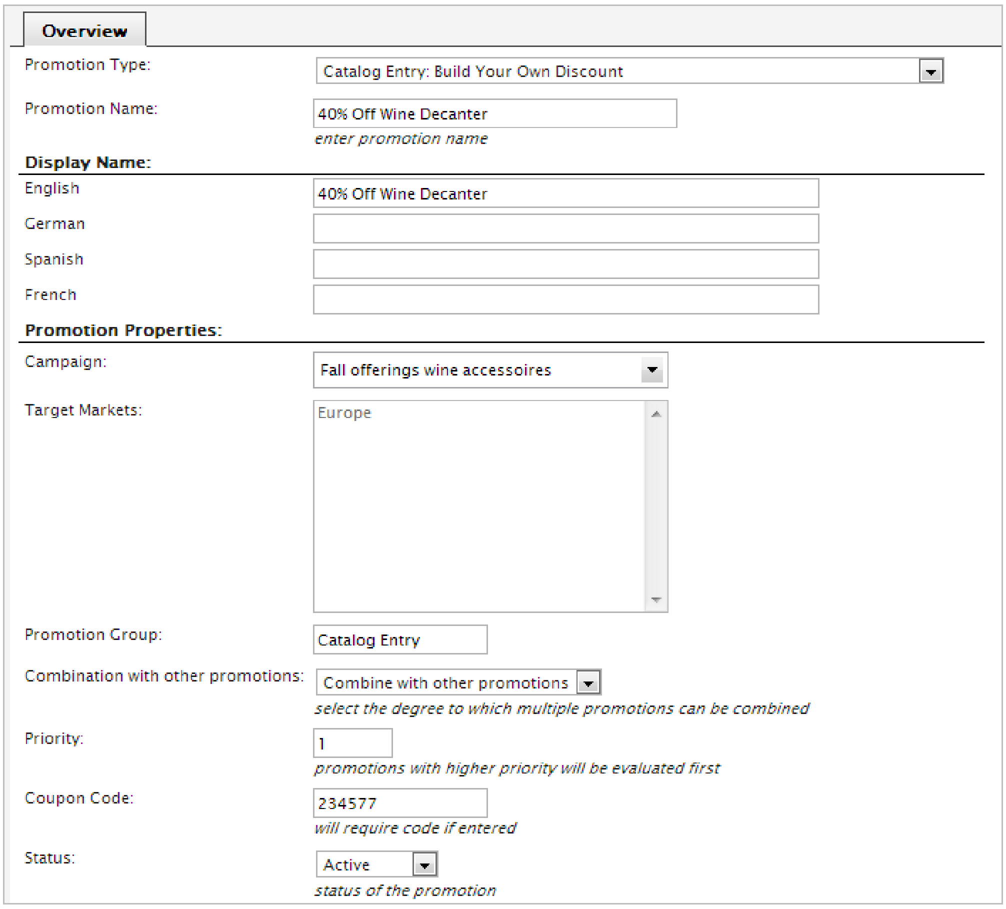
To view and browse promotions, click on **Promotions** on the left navigation bar.



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 entry level promotions

The following Catalog Entry Promotion Types are available out-of-the-box:

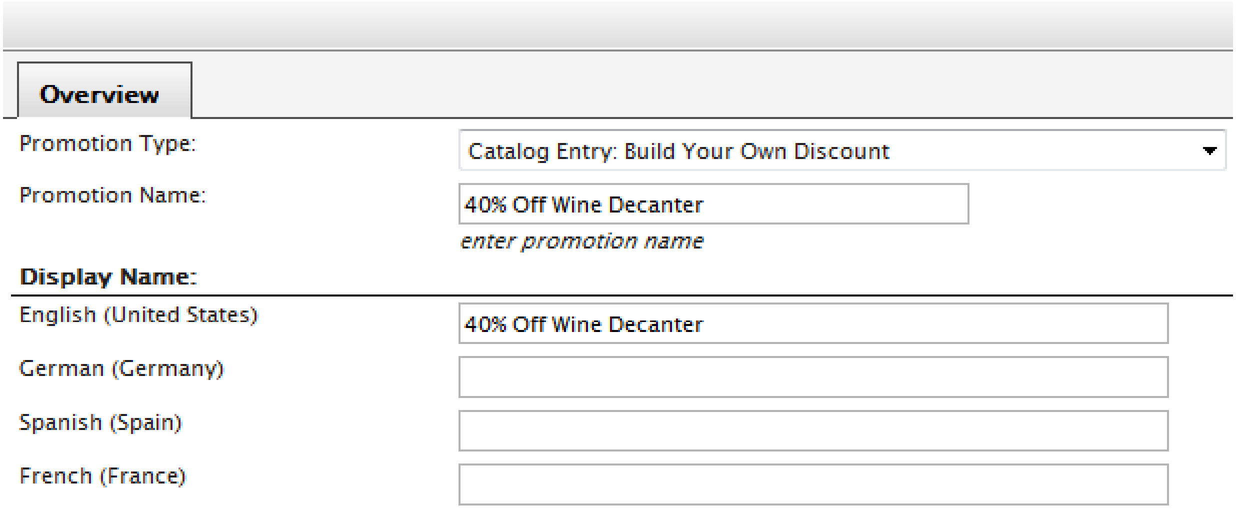
- **Catalog Entry: Build Your Own Discount**
- **Catalog Entry: Buy Catalog entry X, get catalog entry Y at a discount**
- **Catalog Entry: Buy X Get $ Off Discount**

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"

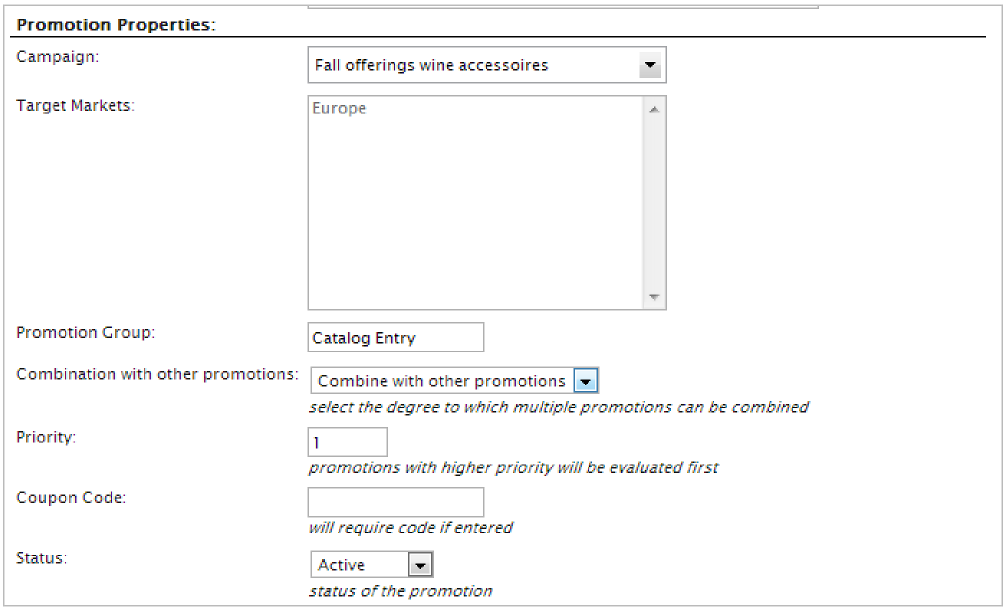
Once you have selected "Build Your Own Discount" from the **Promotion Type** drop-down menu, enter in a **Promotion Name**, such as "40 % Off Wine Decanter"

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



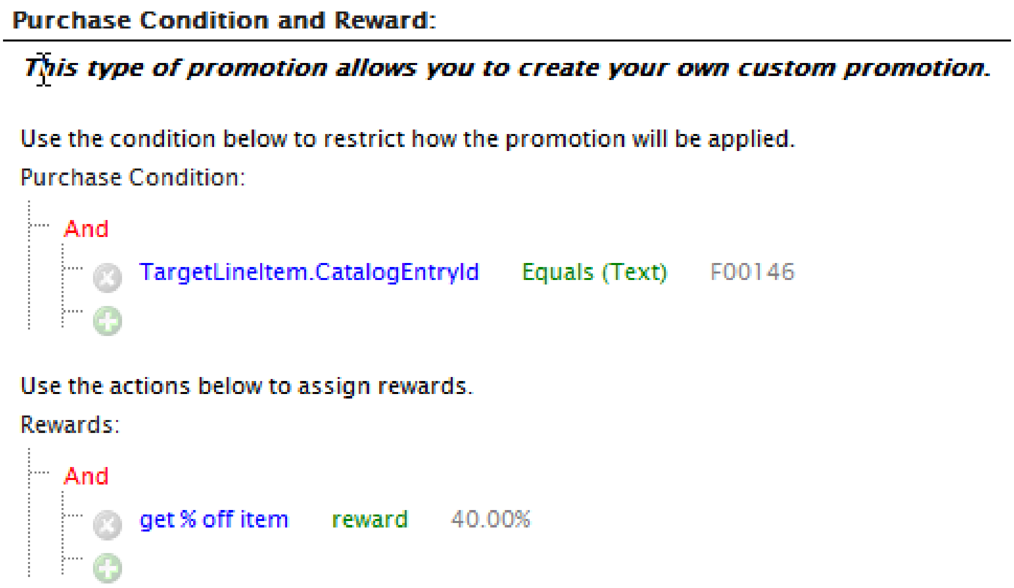
Promotion Properties:

- Under the **Campaign** drop-down, select an existing *campaign created* earlier.
- **Target Markets** will display the associated markets for which the campaign is available.
- **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:

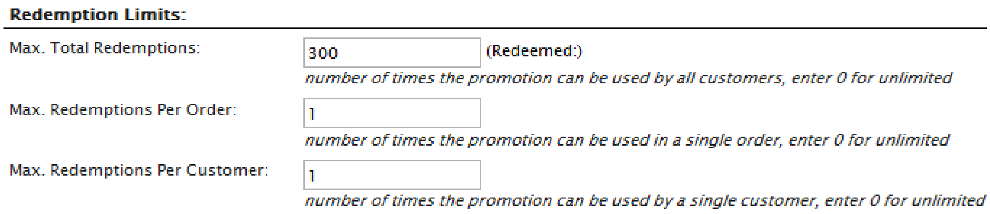
Here you can set your own **Purchase Condition** to receive the discount **Rewards**. To apply a 40% discount for a wine decanter, use the following settings in the screenshot.



Redemption Limits:

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

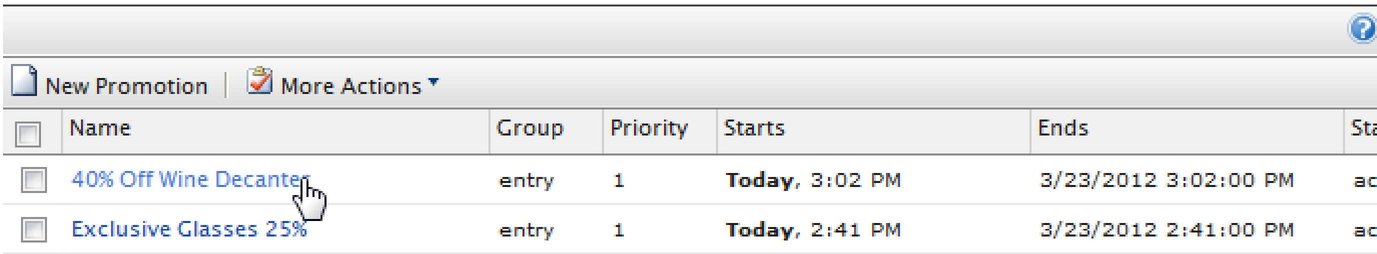
- Next to **Max. Total Redemption**, enter in the maximum number of times the promotion can be redeemed.
- Next to **Max. Redemption Per Order**, enter in the maximum number of times the promotion can be redeemed per customer order.
- Next to **Max. Redemption Per Customer**, enter in the number of times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

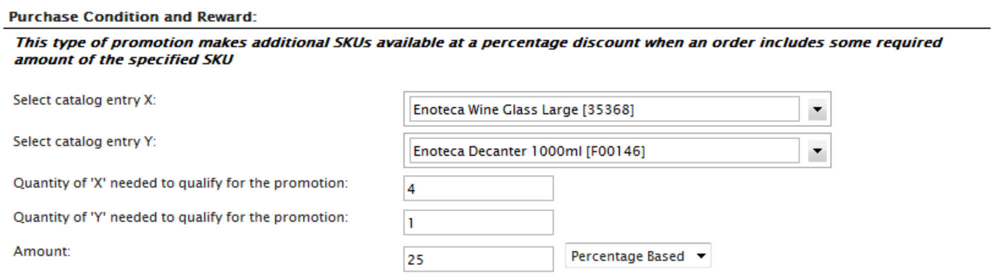


When the promotion is applied, the price on the front-end should change.

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

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**:

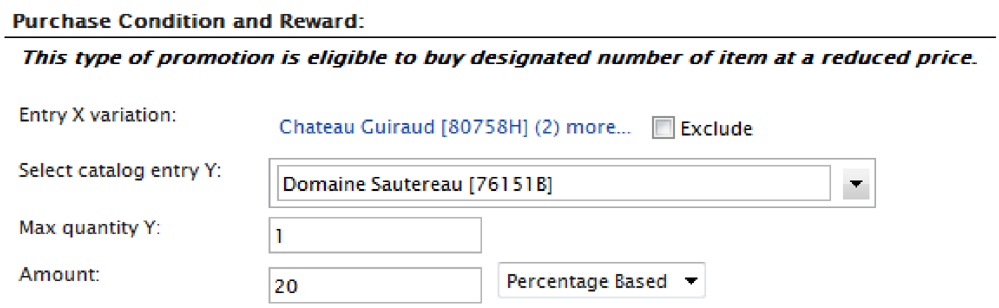
- **Order: Buy X, get N quantity of Y at a discount**
- **Order: Sub Total Volume Discount** - if the order subtotal minimum is met, then the customer receives the discount.
- **Build Your Own Discount** - you can create a custom order level promotion based on a range of purchase conditions and rewards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

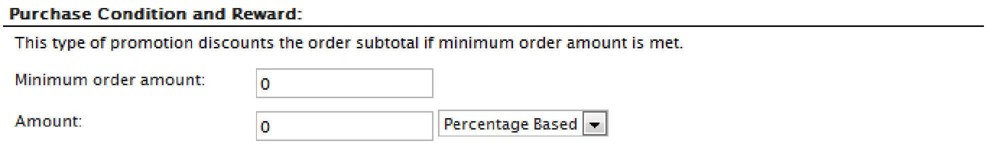
1. Select an **Entry X variation** from the drop-down menu and click on "add variation.
2. **Select catalog entry Y** from the drop-down menu. A certain number of "Y" entries will be discounted based on the Purchase Conditions.
3. Enter a **Max quantity Y** for the maximum number of Y entries eligible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

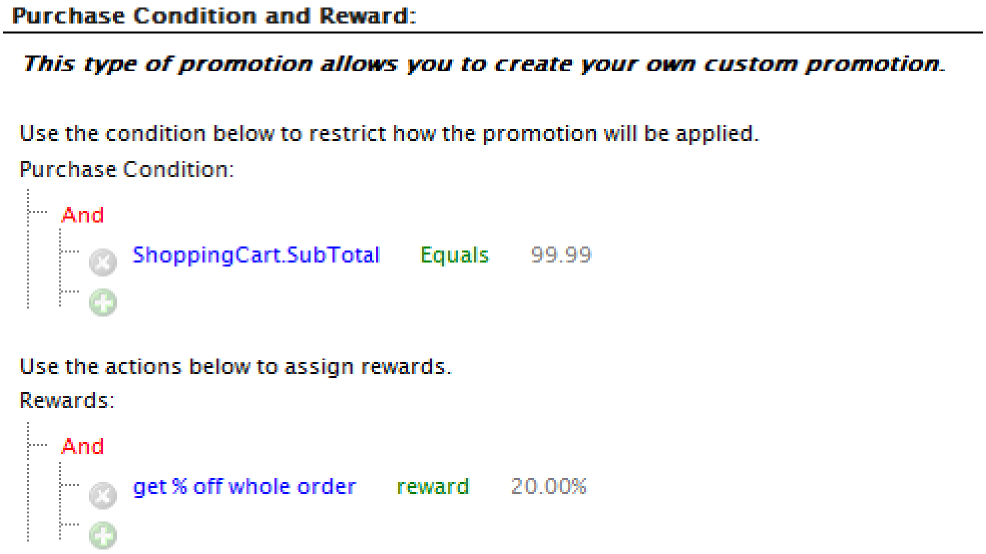
Enter in the **Amount** of the discount. It can either be "Percentage Based" or "Value Based." If Percentage Based, then the customer gets a percentage off the price. If Value Based, the customer gets a fixed amount discounted off.



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

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**:

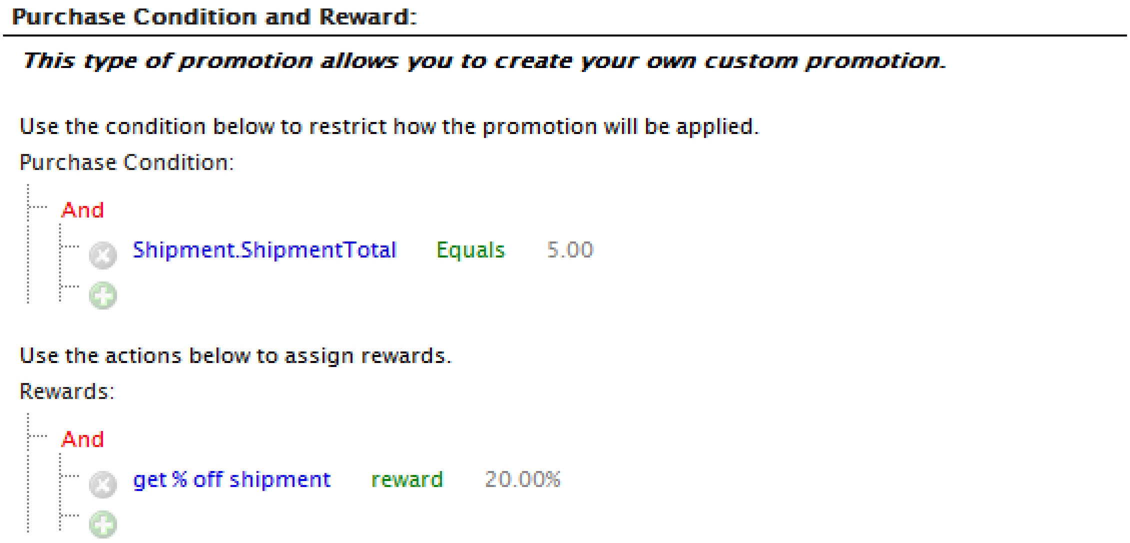
- **Shipping: Build Your Own Discount** - you can create a custom shipping promotion based on a range of purchase conditions and rewards (similar to creating a custom catalog or order entry discount).

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

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.

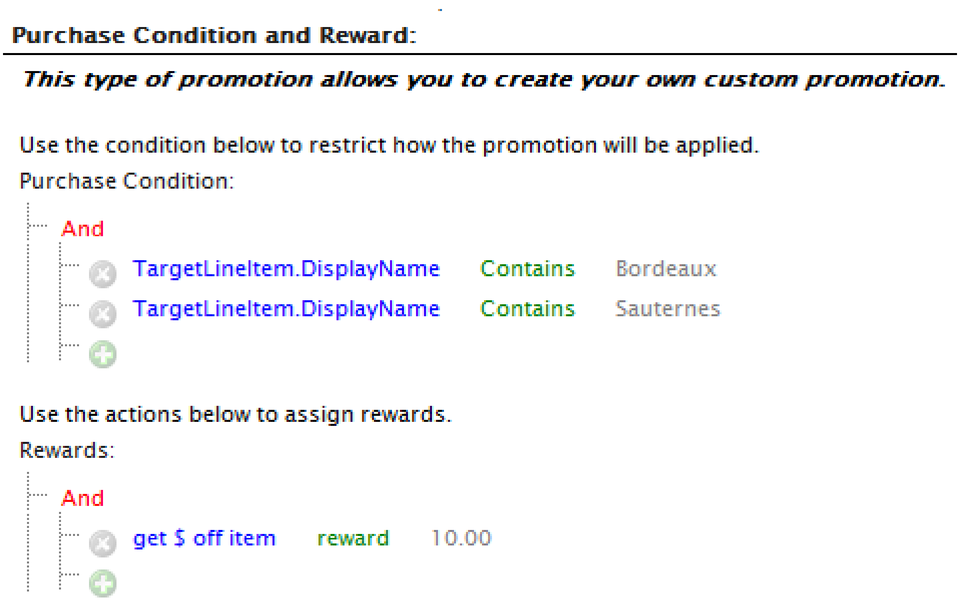
How to use "or" when building your own promotions

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.



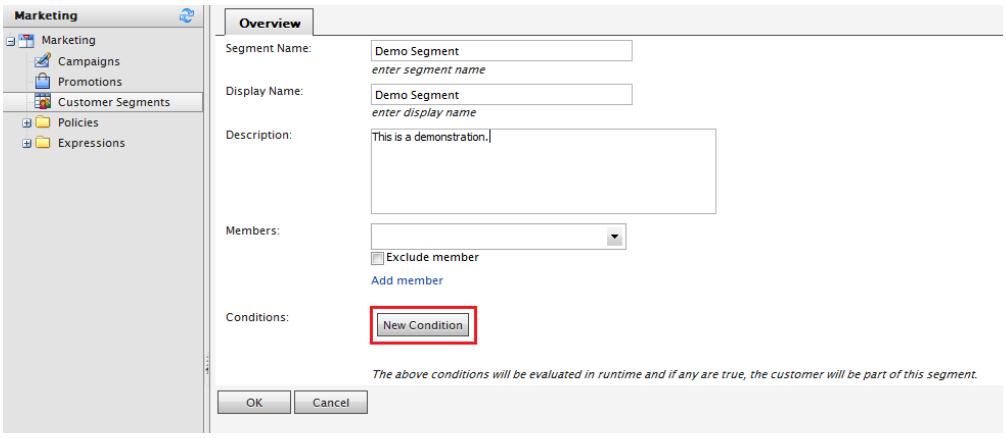
Setting promotions by customer group

Customer groups are useful for instance when setting specific permissions, promotions and targeted marketing campaigns. Customer groups are not applied directly to a single promotion but rather controlled at the campaign level by means of customer segments. *Customer segments* allows various conditions to be defined, one of which is "Customer Group". If any condition is satisfied then the customer in question qualifies for the segment.

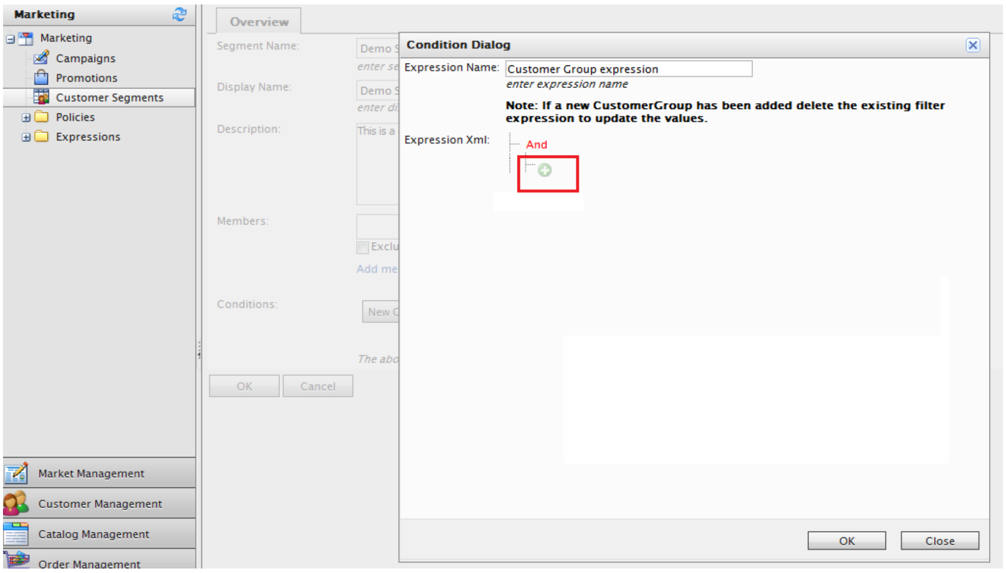
Applying customer groups to promotions

Do the following to create a promotion for a specific customer group.

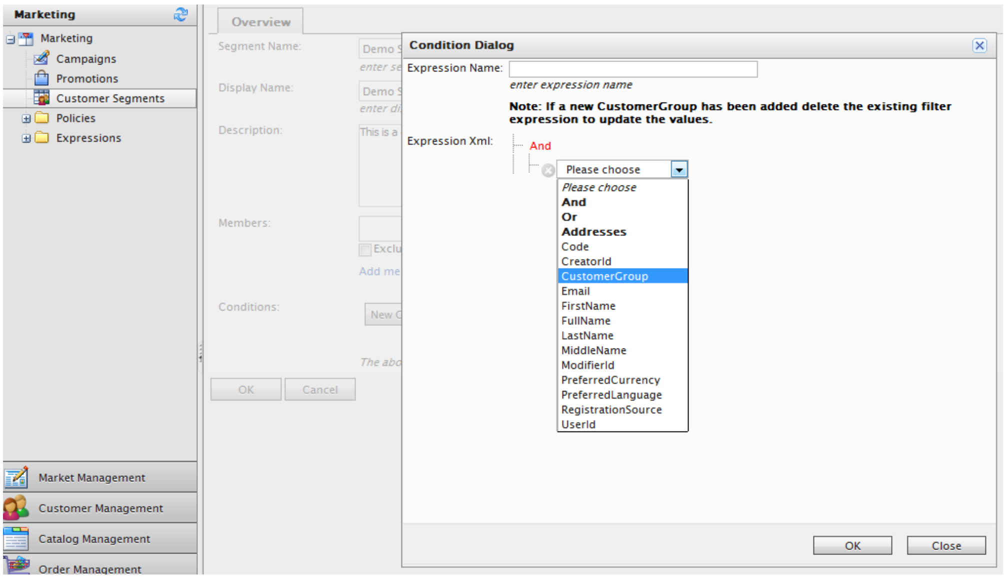
1. In the **Marketing** view in Commerce Manager, select **Customer Segments** and click **New Segment** or edit an existing one in the list. Click **New Condition** or edit an existing condition.



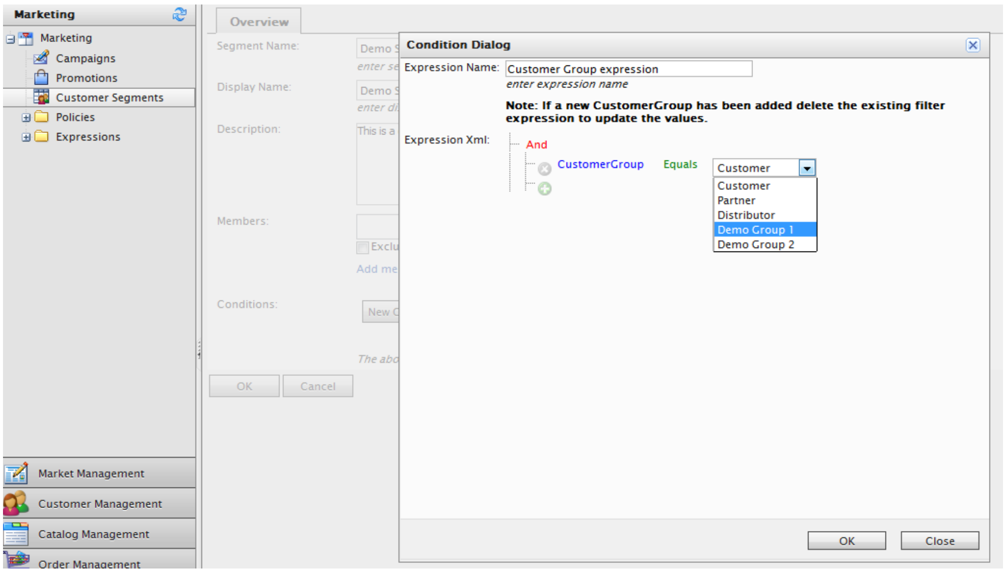
2. Click the green plus sign to start entering criteria for the condition.



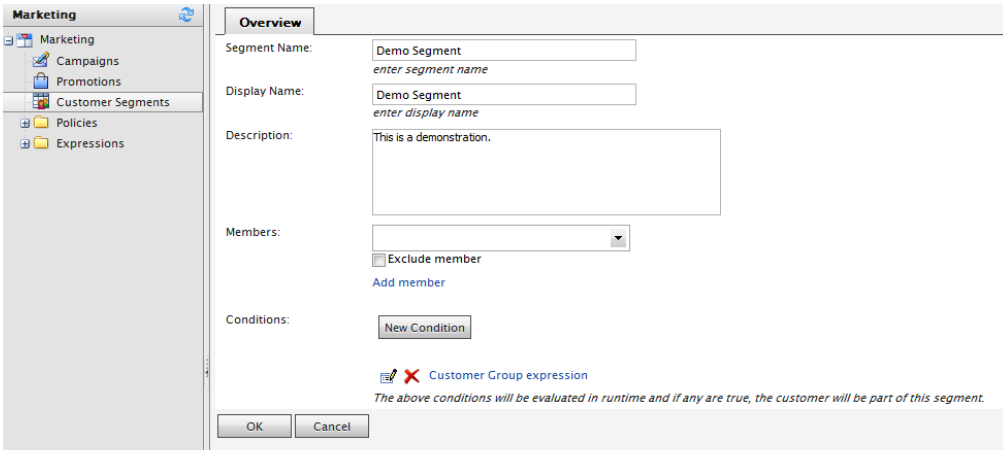
3. Select "CustomerGroup" and select a specific Customer group. Note that the customer group must first be *created in Commerce Manager*, before it will appear in the listing.



4. Click **OK** to make the Customer Segment reflect the added condition (only the name is displayed for the condition). It is recommended to use a condition name indicating the customer group.

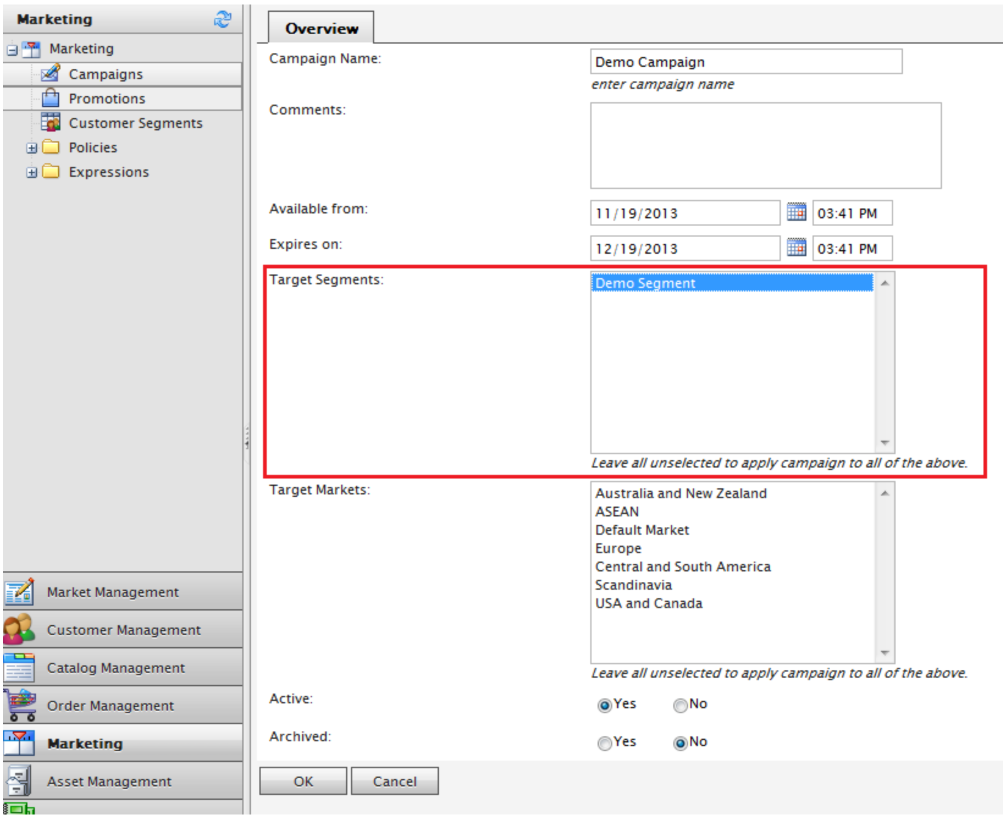


5. The above example is a simple inclusion check, but there are additional options for customizing the selection of customers. For example the "Equals" comparison can be changed to "NotEquals", which can be useful for excluding multiple customer groups as long as they do not match any other conditions for the segment.



6. Once the customer segments have been defined, the **Campaign** dialog allows a marketing campaign to be associated with one or more **customer segments**. All promotions created for the campaign will apply only for users in the selected customer segments. In this example only contacts with an EffectiveCustomerGroup matching the selected customer group will be eligible for pro-

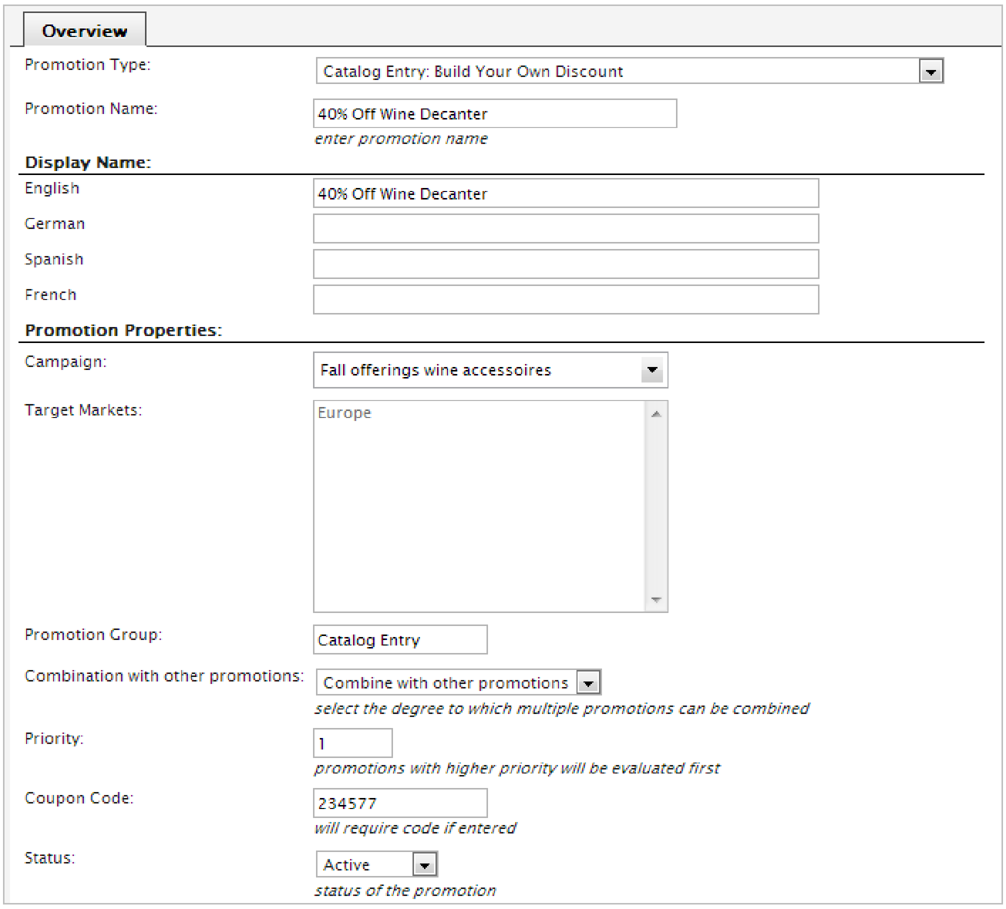
motions in the campaign.



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.

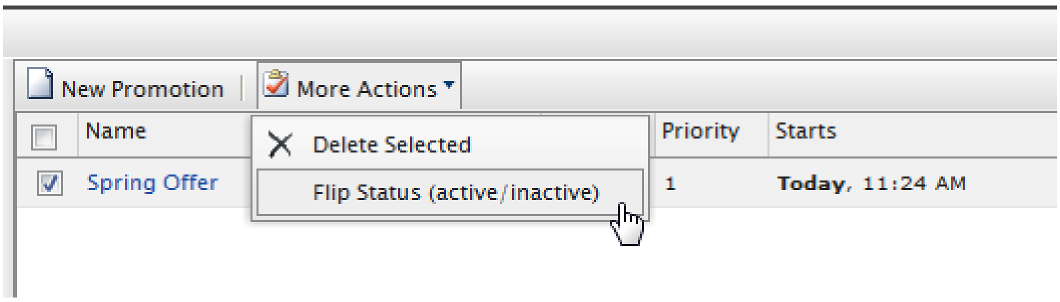


Update the information and click **OK** to save your changes.

Activating and inactivating promotions

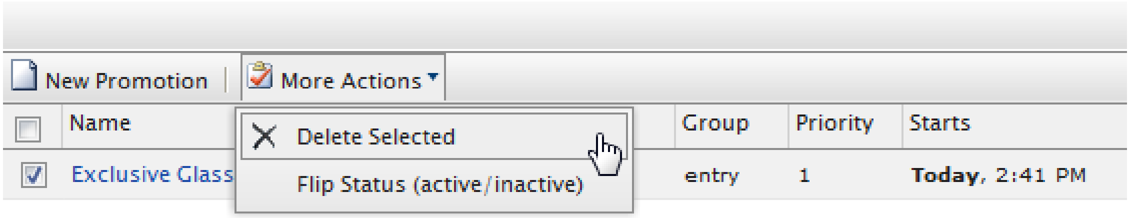
Once a promotion has been created it can be activated and inactivated from the **Promotion List** view. This is useful if you want to keep the promotion for reuse on another occasion.

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.



Expressions

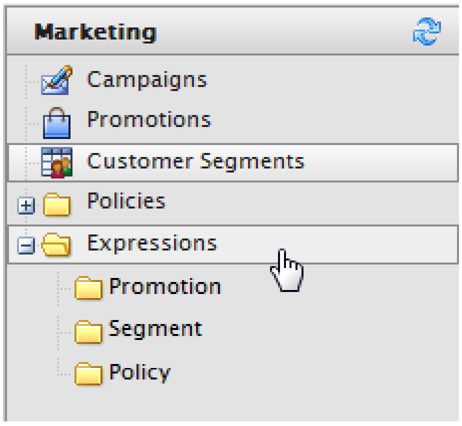
Expressions are customizable **conditions** which allow users to extend different aspects of the marketing system. Expressions are essentially XML statements that enable you to create custom promotions, customer segments, and policies. The various parts of the marketing system - *Promotions*, *Customer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

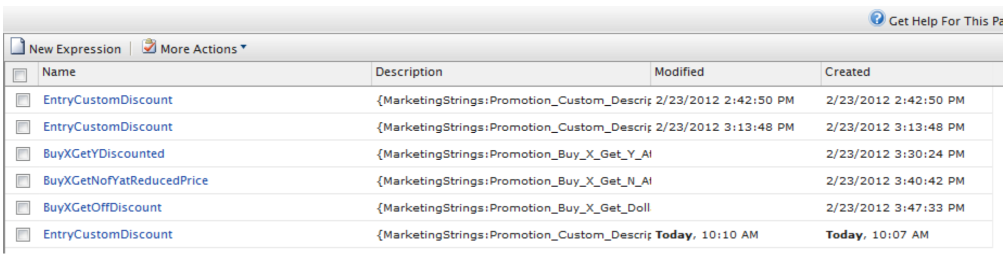
Because of the powerful features of this function, creating expressions should only be done by advanced users of EPiServer Commerce. In order to create an expression, knowledge of XML is required.

Creating an expression

Do the following to create an expression:

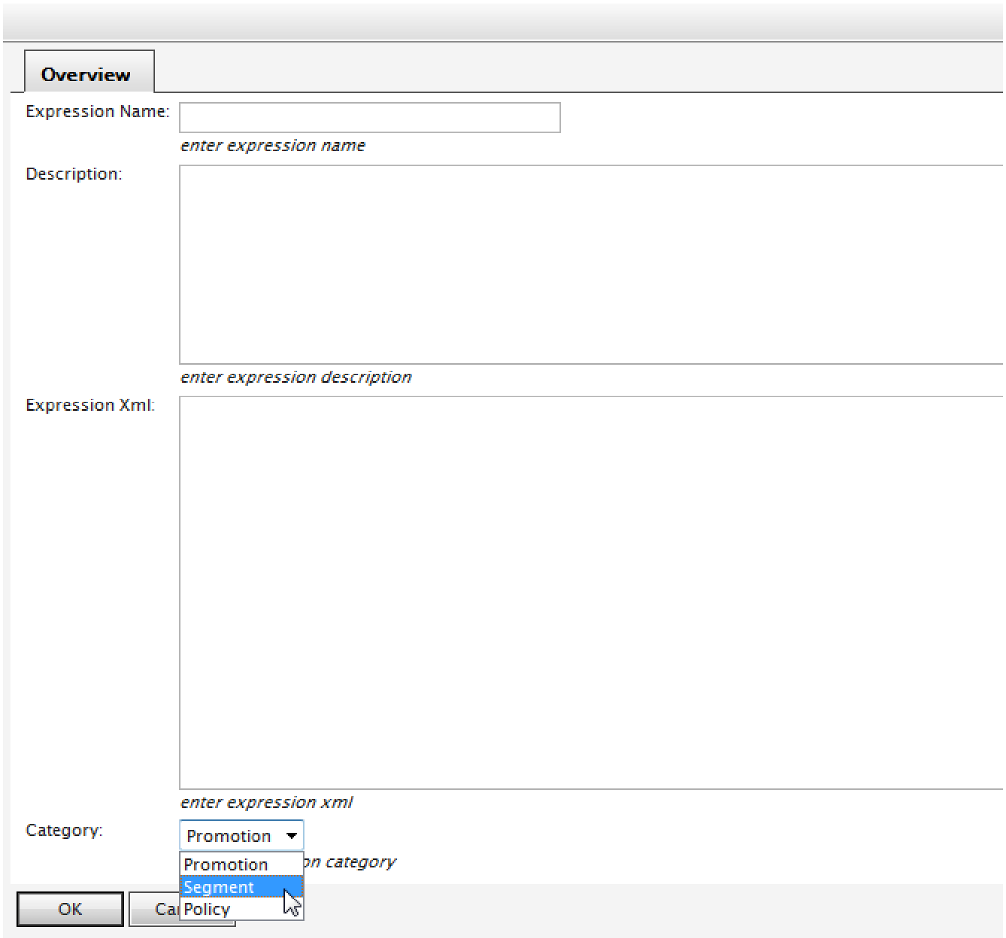
1. Go to **Marketing** under and select **Expressions** .
2. Expand **Expressions** and **Promotions/Segment/Policy** to view the **Expression List** page.



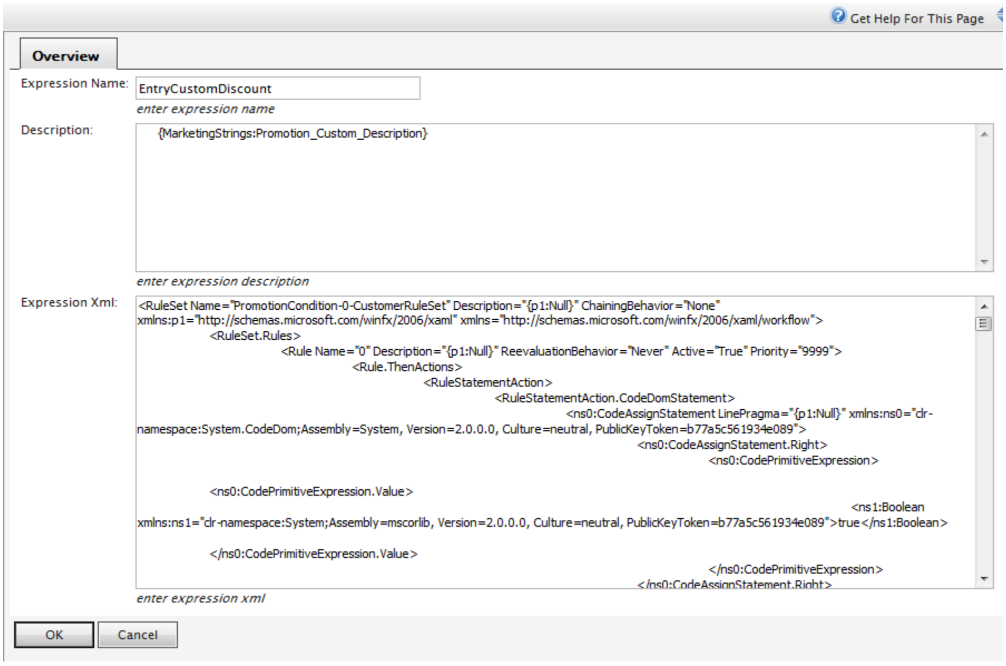


3. To create a new Expression, click on **New Expression**. The **Expression Edit** page appears.
4. Enter an **Expression Name**, such as "EntryCustomDiscount."

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.



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



Policies

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.

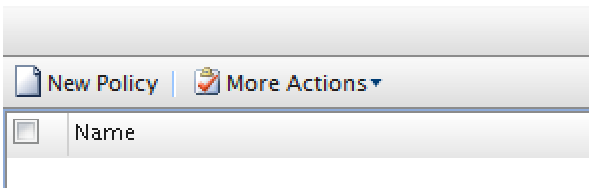
If a policy is associated with a promotion group, it is considered a **local policy**, and applies only to those promotions in the group to which this policy is associated. If a policy is not associated with a promotion group, it is considered a **global policy** which applies to all promotions. This 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

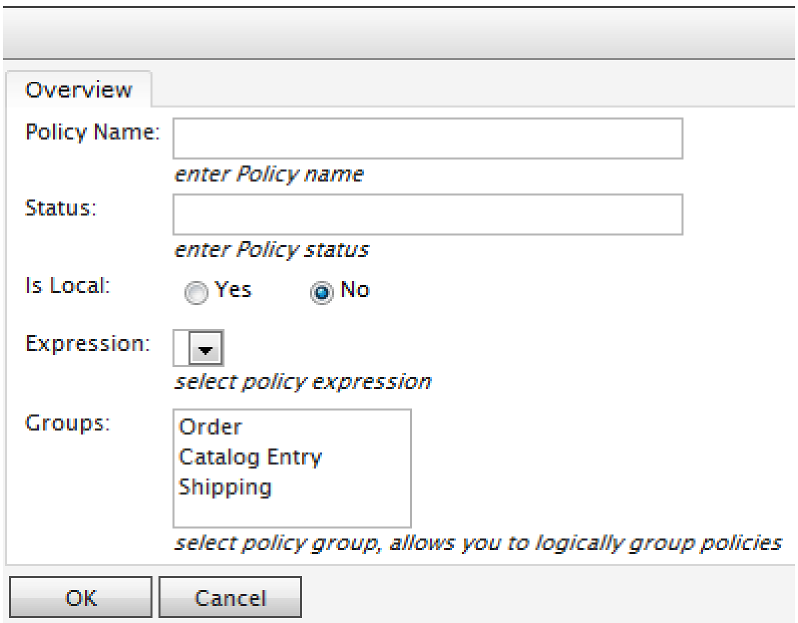
Do the following toe create a policy:

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.

Reporting

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, time, currency and markets*, and reports can be exported to Excel or PDF format, or printed.

You can also develop your own customized reports, refer to the *technical documentation for EPiServer Commerce* for more information on how to extend the report functionality.

Working with reports

The work with reports includes the following tasks:

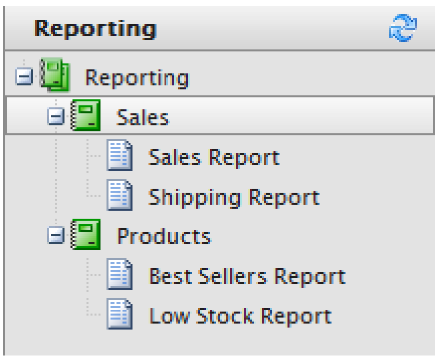
- *Generating various reports* based on e-commerce data such as sales quantities, markets, order numbers, shipping costs and inventory stock status.
- Filtering the view for displaying data for the desired time intervals.
- Exporting reports to various outputs such as Excel, PDF or print.

Generating and exporting reports

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.

Accessing reports

Reports are managed under the **Reporting** option in the left menu of Commerce Manager.

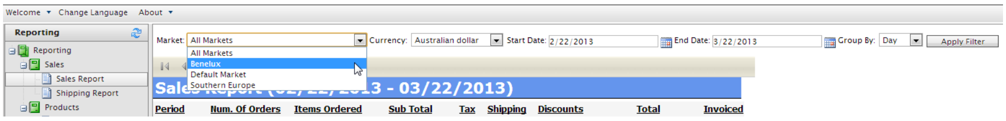


Generating a report

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

Reports can be filtered by *markets* and currencies, together with a date intervals. To filter the data displayed, select **Market**, **Currencies** and set 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.



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

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:

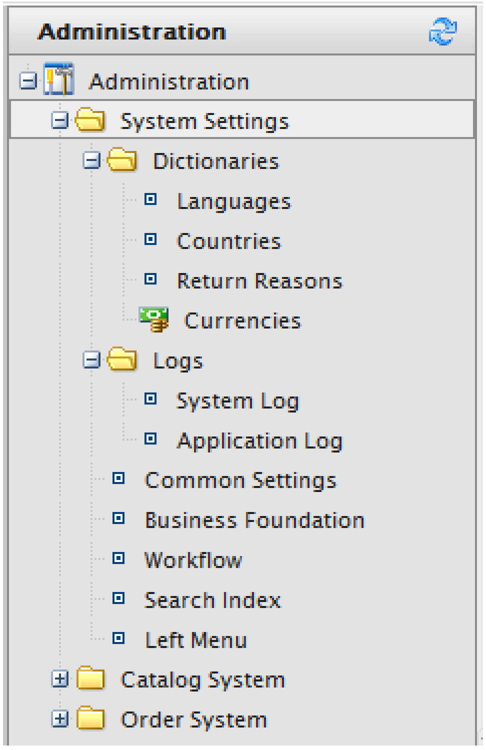
- Adding new *languages*, *countries*, *currencies* and *return reasons* to the e-commerce system, which is done through so called *Dictionaries*.
- Tracking changes and monitoring system activities through the *log features.*
- *Configuring common settings* such as default language, currency, and length 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 developer documentation for EPiServer Commerce for more detailed 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**.

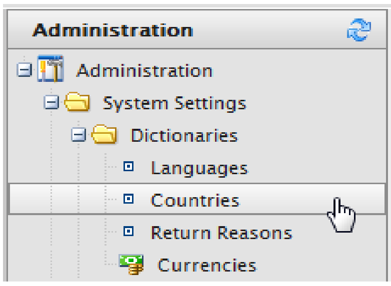
Dictionaries

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.

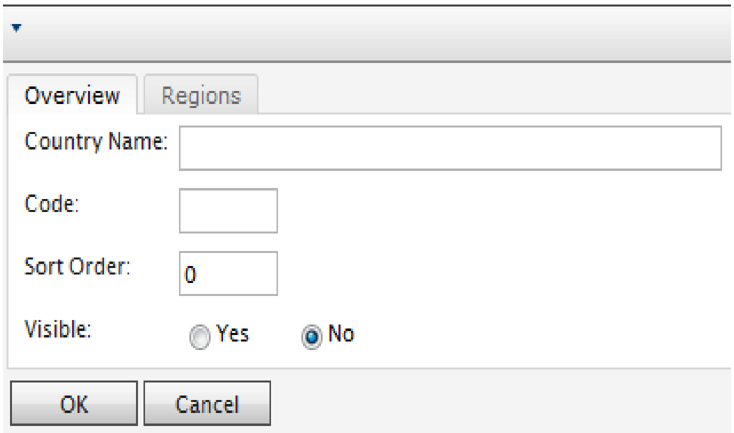
Adding countries

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:

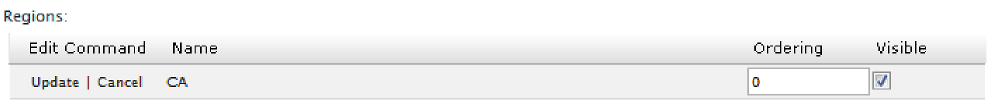
- **Country Name** - this is the friendly name that is displayed in the public site during the checkout process
- **Code** - to obtain the correct **country** code, go to the *MSDN site Table of Country/Region and State/Province Names and Codes [C++]* (use the ISO Short Code or ISO Long Code as long 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:

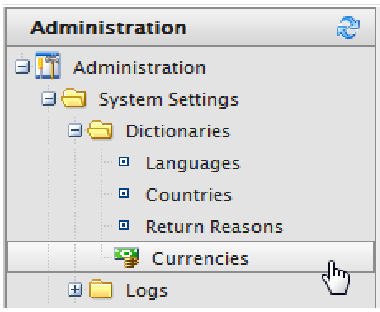
- Type a **Friendly Name** (e.g. CA - this will be displayed in the public site during the checkout process) and click **Add**. You can checkmark it either as **Visible** or not on the public site

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



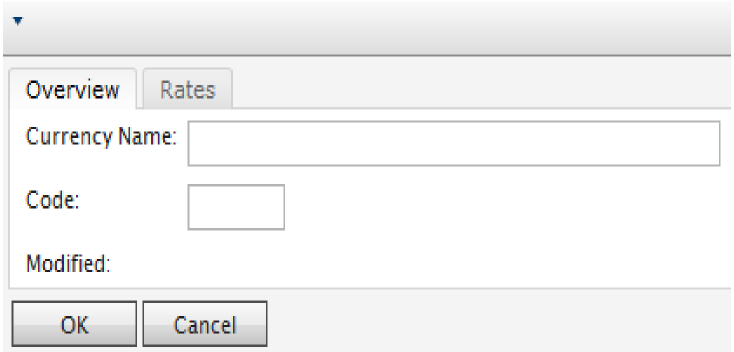
Adding currencies

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.*

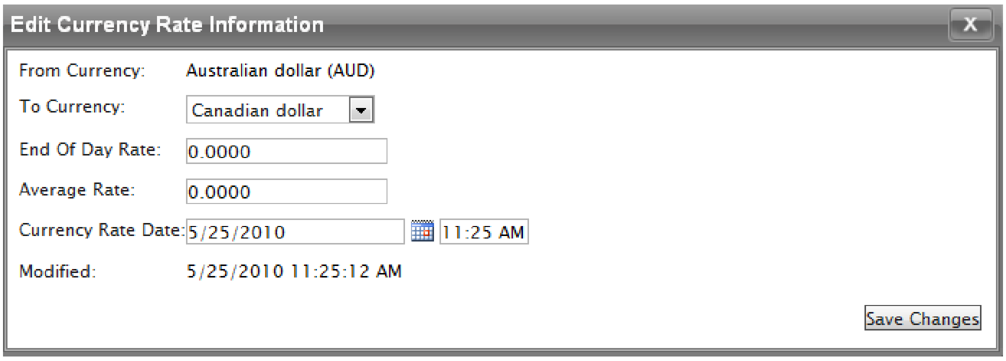


In the **Rates** tab, you can **Add Rates** which are the foreign exchange rate when you want to convert from one currency to another.

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

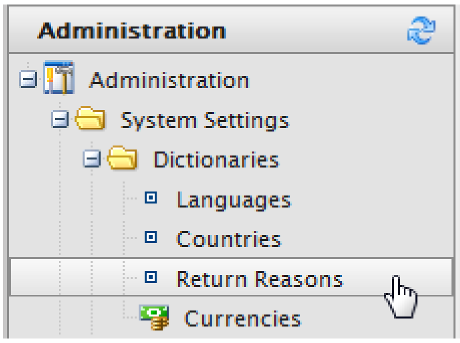
- **To Currency** - select from the drop-down the currency to convert to from the current currency.
- **End of Date Rate** - enter the **End of Day** rate.
- **Average Rate** - enter the **Average** rate.
- **Currency Rate Date** - enter a **Currency Rate Date**.

Click **Save Changes**.



Managing return reasons

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

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.

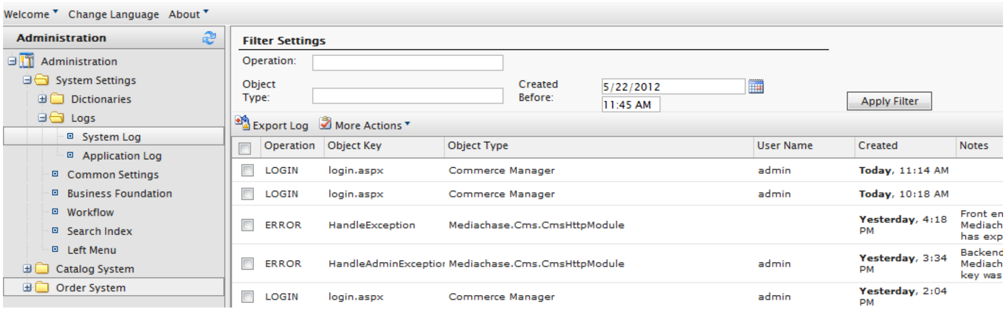
In the database, the logs are recorded in the dbo.ApplicationLog table. For details on how to set up and configure the logging features, refer to the *Developer Guide for EPiServer Commerce*.

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.

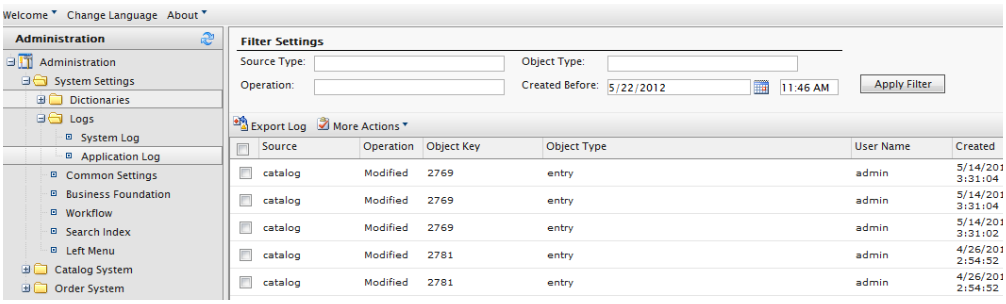
You may filter these logs to show more detail by filtering by **Operation**, **Object Type**, or the **Created Before** date and time and clicking **Apply Filter**. You may also use **Export Log** for your records after you have filtered for the desired data. The **More Actions** drop-down includes options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

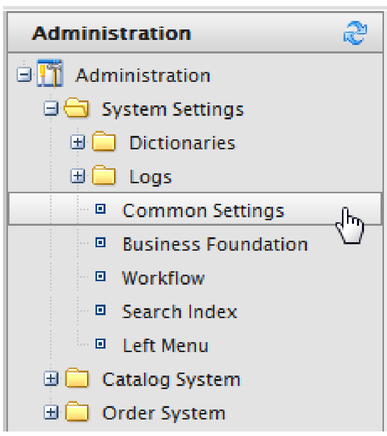


Configuring common settings

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.

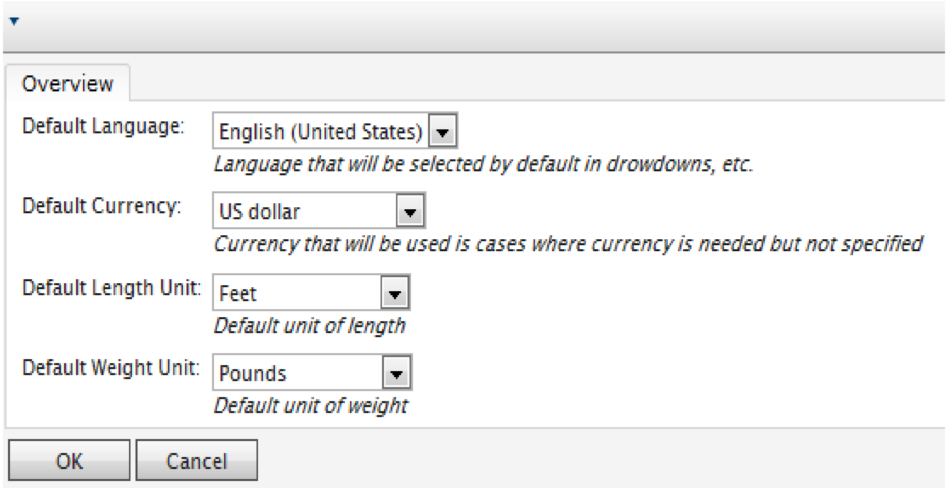
Defining languages, currencies and length/weight units

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.



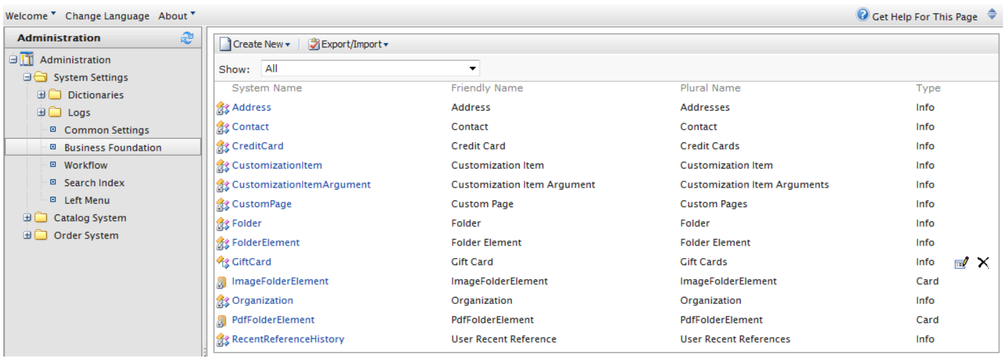
Click **OK** to save your changes.

See also

Refer to *Globalization* and *Translating content* for more information on how to work with multiple languages in EPiServer.

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

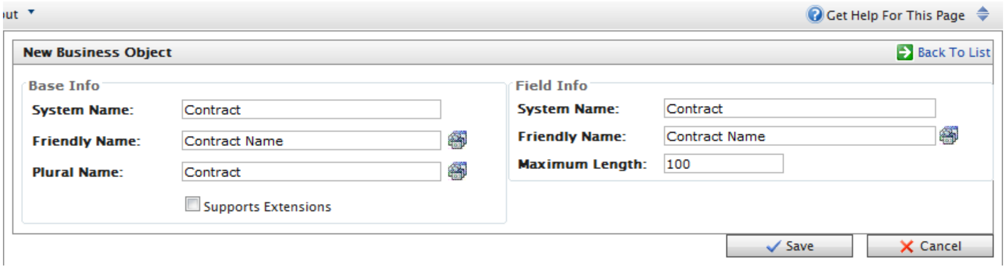
Creating business objects allows users to extend customer and asset forms for tracking and relating different types of data. New business objects can be created to suits a multitude of business purposes. In this example we will describe how to create a "Contract" business object.

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.

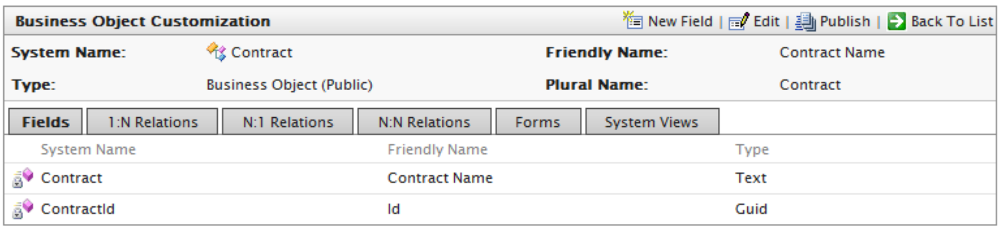
Base Info

- **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

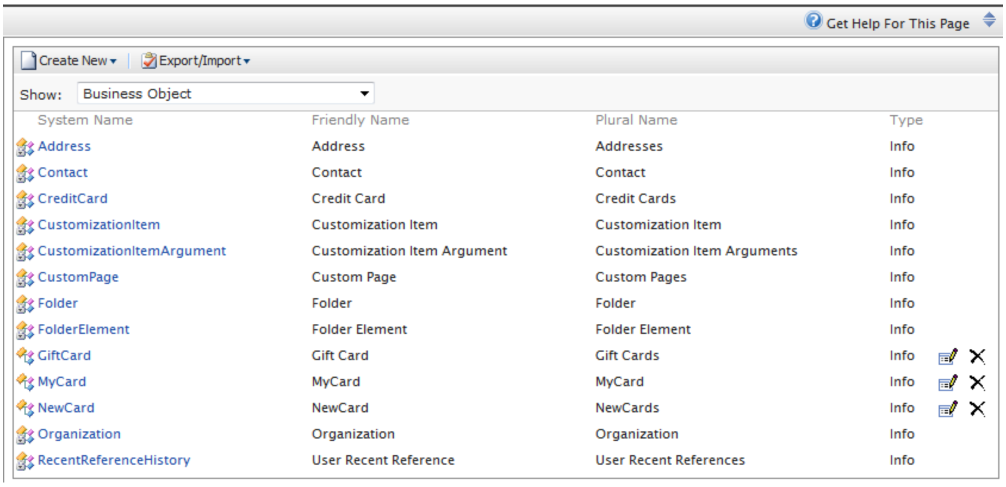
Add fields to the contract business object as needed, refer to *Adding Fields to Business Objects*. To further customize a business object, refer to *Customizing Business Objects*.

Customizing business objects

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

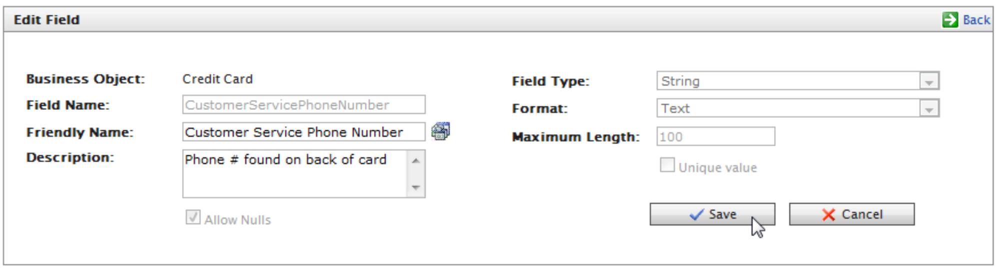
Many of the default business objects and related fields can be both edited and deleted but not all of them. For example, pre-existing business objects such as "Address" and "Organization" cannot be deleted, only edited. Business objects that can be edited and deleted will have an **Edit** and **Delete**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

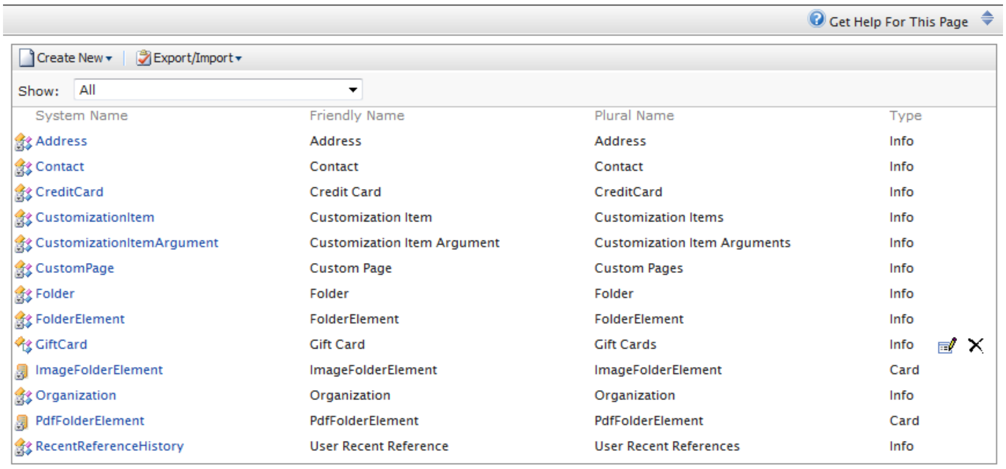
Adding fields to business objects

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

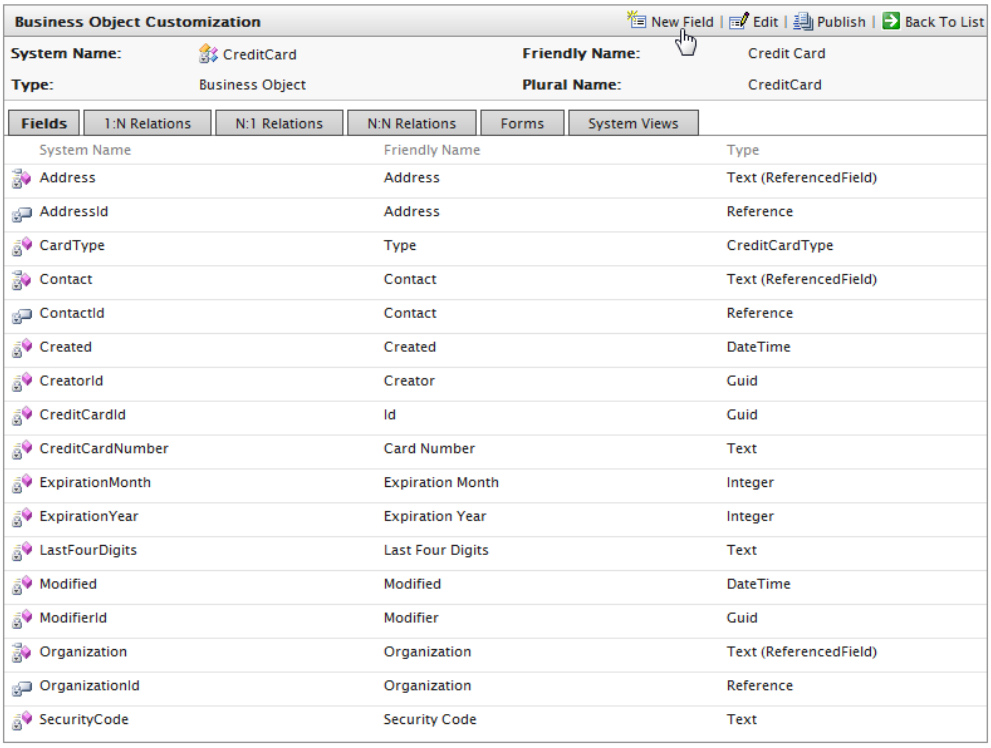
Do the following to add fields to an existing business object:

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.



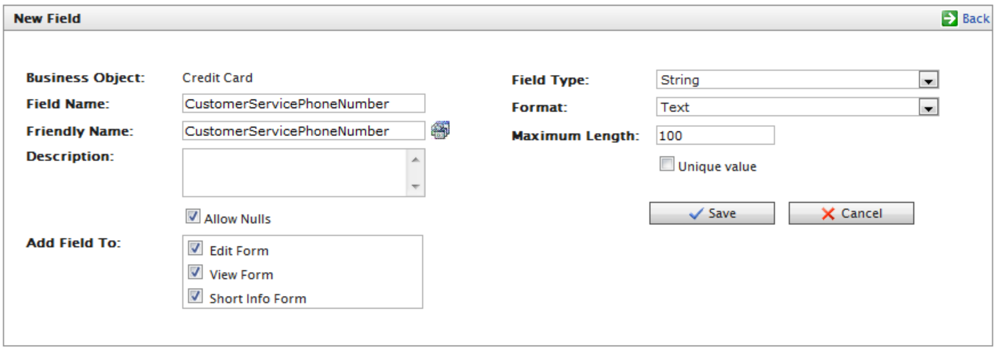
System Name	Friendly Name	Plural Name	Type
Address	Address	Address	Info
Contact	Contact	Contact	Info
CreditCard	Credit Card	CreditCard	Info
CustomizationItem	Customization Item	Customization Items	Info
CustomizationItemArgument	Customization Item Argument	Customization Item Arguments	Info
CustomPage	Custom Page	Custom Pages	Info
Folder	Folder	Folder	Info
FolderElement	FolderElement	FolderElement	Info
GiftCard	Gift Card	Gift Cards	Info
ImageFolderElement	ImageFolderElement	ImageFolderElement	Card
Organization	Organization	Organization	Info
PdfFolderElement	PdfFolderElement	PdfFolderElement	Card
RecentReferenceHistory	User Recent Reference	User Recent References	Info

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**.



System Name	Friendly Name	Type
Address	Address	Text (ReferencedField)
AddressId	Address	Reference
CardType	Type	CreditCardType
Contact	Contact	Text (ReferencedField)
ContactId	Contact	Reference
Created	Created	DateTime
CreatorId	Creator	Guid
CreditCardId	Id	Guid
CreditCardNumber	Card Number	Text
ExpirationMonth	Expiration Month	Integer
ExpirationYear	Expiration Year	Integer
LastFourDigits	Last Four Digits	Text
Modified	Modified	DateTime
ModifierId	Modifier	Guid
Organization	Organization	Text (ReferencedField)
OrganizationId	Organization	Reference
SecurityCode	Security Code	Text

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.

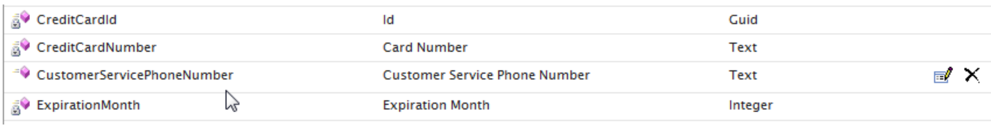
Checkmark on or off to **Allow Nulls** for this field.

You can choose to **Add Field To** an existing Form. Checkmark all that apply.

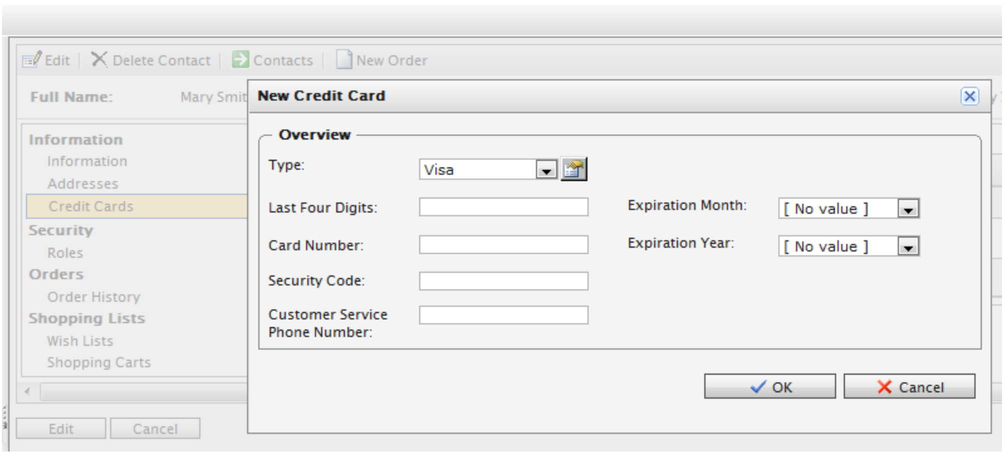
Enter a **Field Type**. For further explanation of each Field Type, refer to the Reference Section on the bottom of this page. In this example, a **String** field type is used.

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.

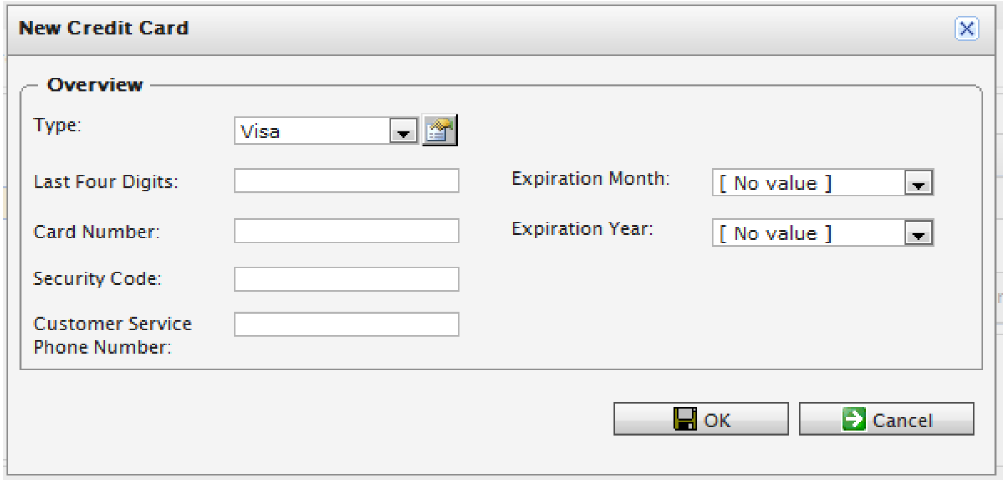


5. To verify if the new field appears, check the form associated with that new field. Since this example customized the **New Credit Card** form, you will see that the new field appears.



Customizing forms

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:

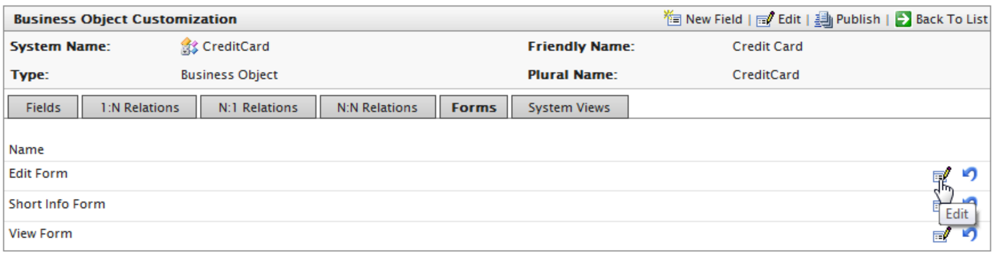


In this section we will describe how you can customize forms and adapt them to the specific needs of your EPiServer Commerce users.

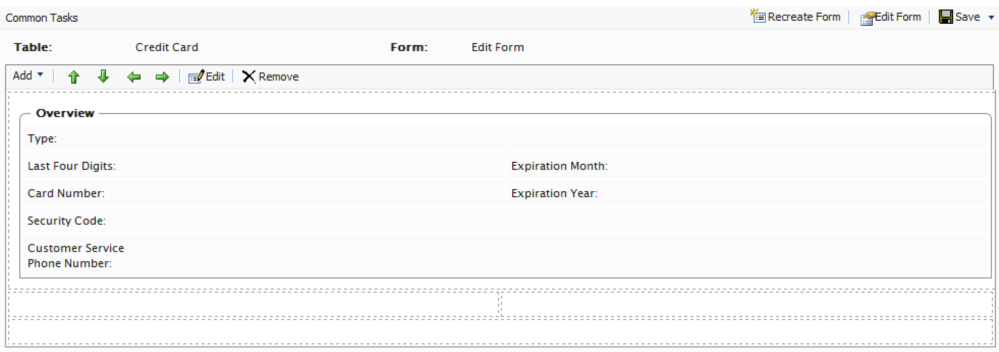
Editing forms

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.



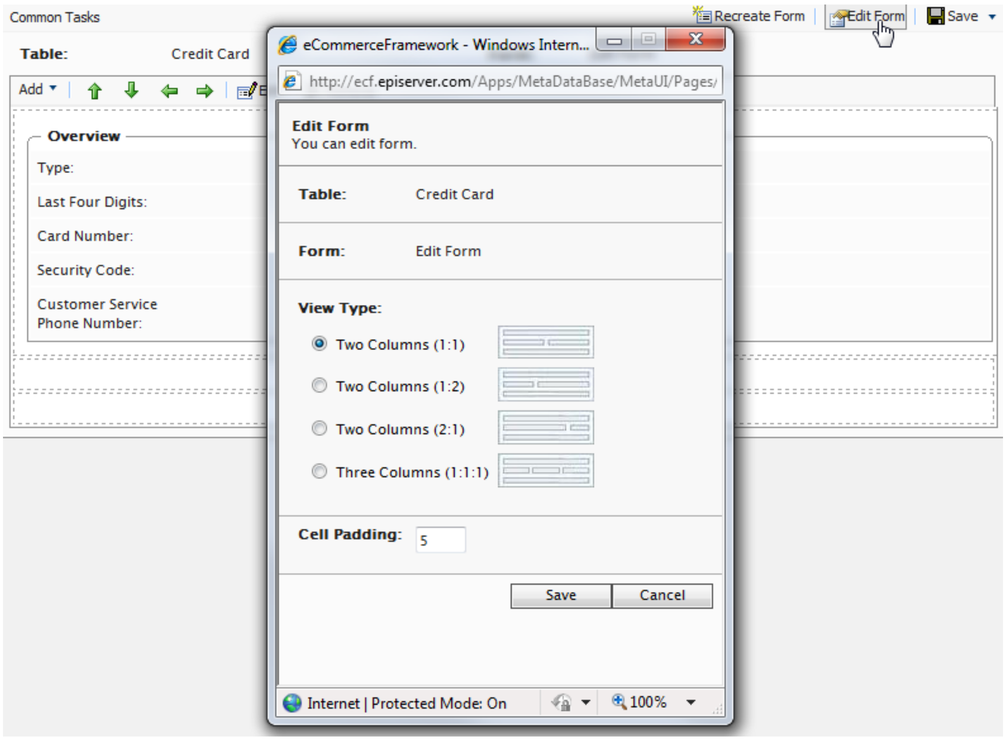
There are various functions available to edit and customize a form.

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.

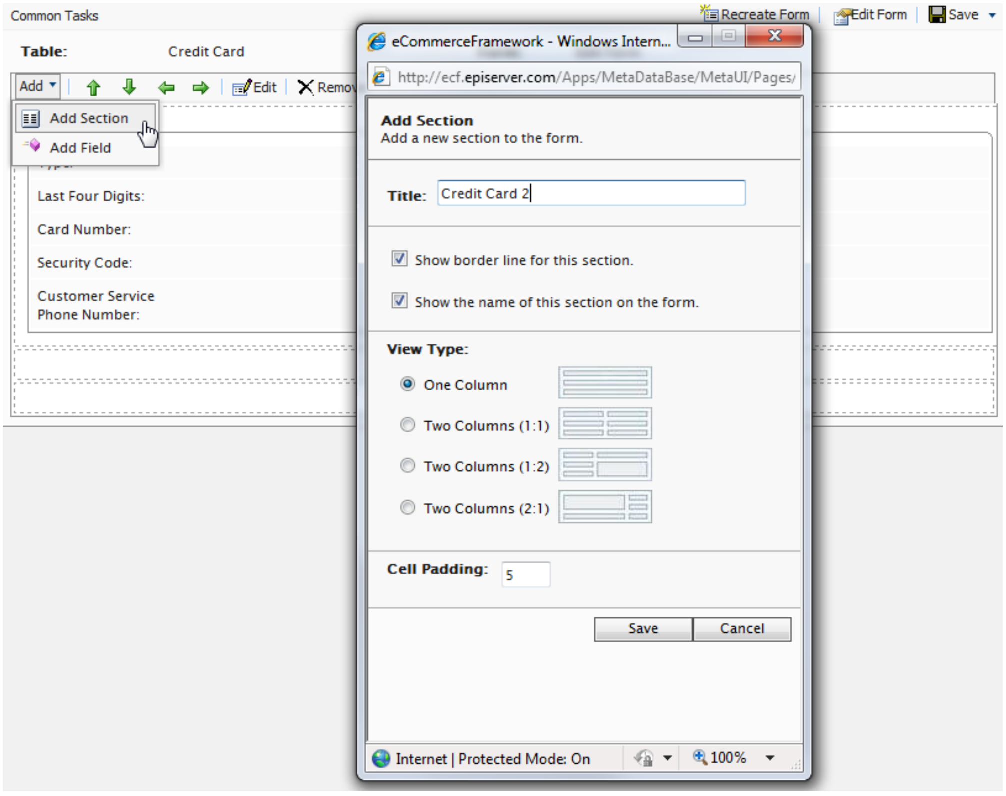
This example uses a Two Column (1:1) layout.



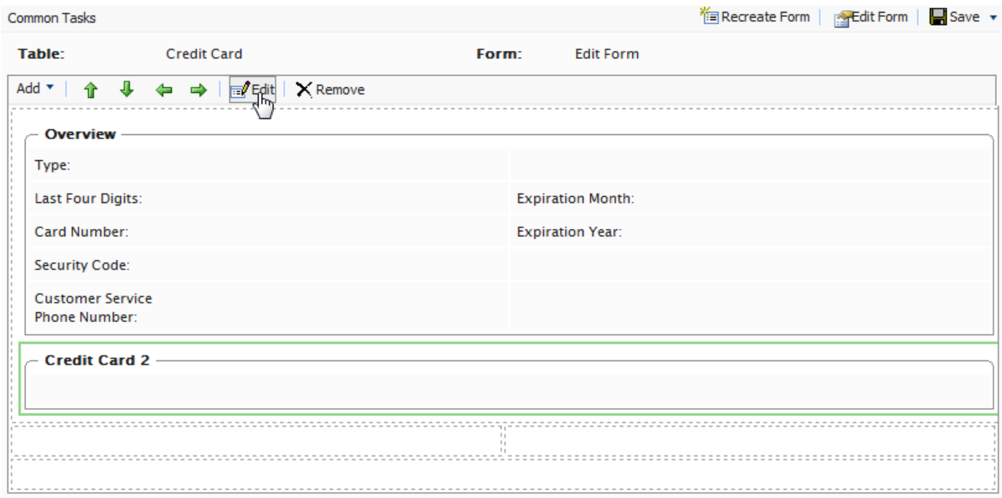
Adding sections and fields

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

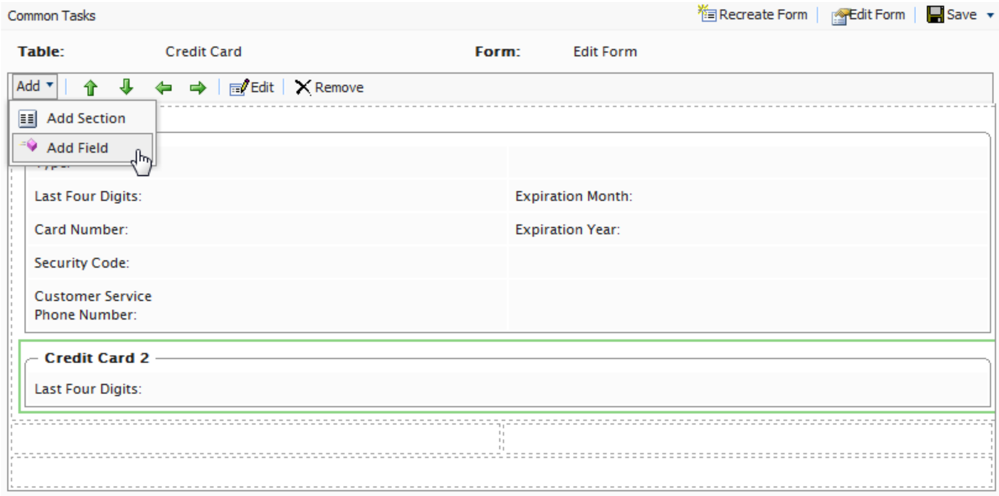
1. Click on **Add --> Add Section** to add a new section. Adding sections allows you to separate and divide groups of fields on a form with their own header and border.
2. Enter in a **Title** for the section.
3. Checkmark the box next to "Show border line for this section" if you want to show the border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

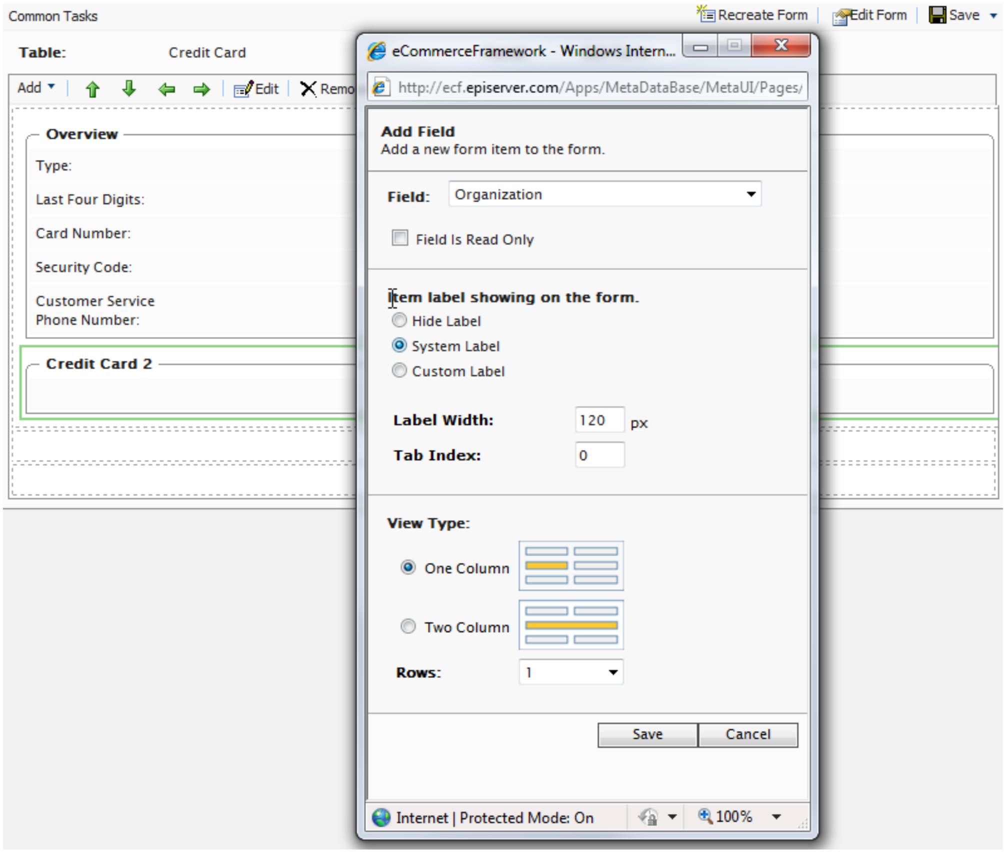


Within each section are fields. You can add new fields to a specific section by highlighting the section and then by clicking **Add --> Edit**.

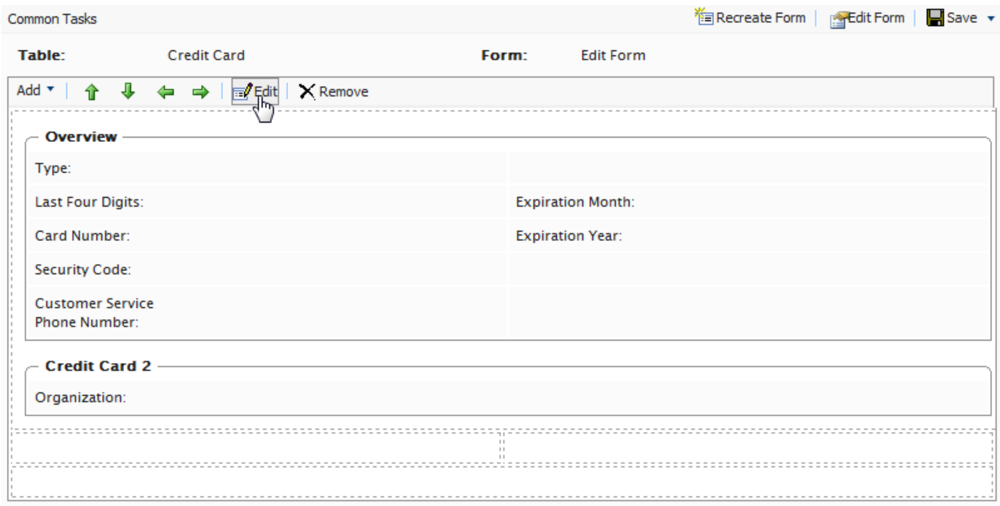


Select an existing associated field in the dropdown menu.
a. Checkmark the "Field is Read Only" box if you want the field to be unavailable for edit. When you see the rendered form, the field will be grayed out.

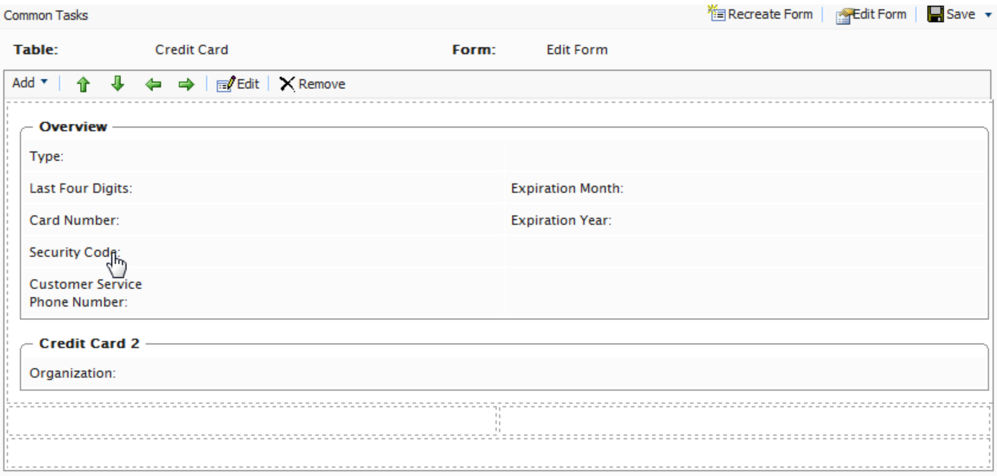
1. Select the "Item label showing on the form."
2. - **Hide Label:** No label appears next to the text box
   - **System Label:** Shows the system name next text box
   - **Custom Label:** Enter in a custom label
3. Enter in a **Label Width** numerical value. Default is 120px.
4. **Tab Index**: enter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



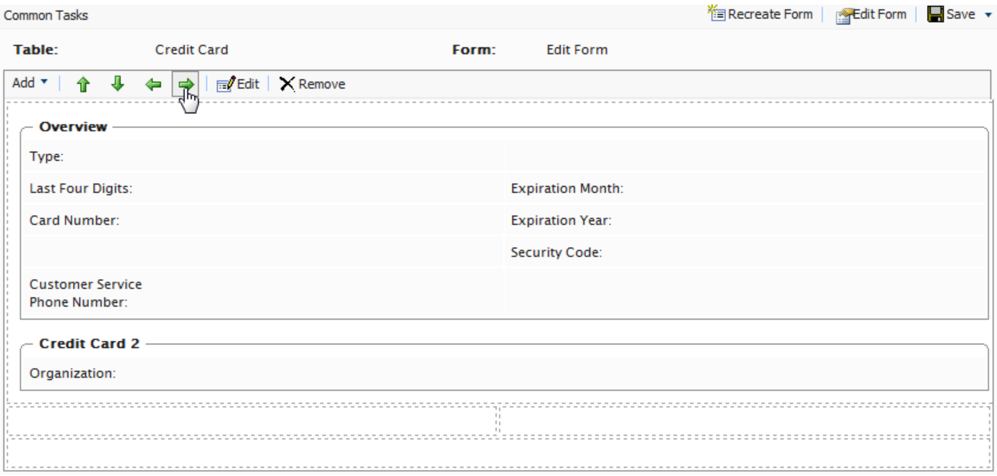
To edit a field, click and highlight the field and click on **Edit** to change your previous settings.



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.

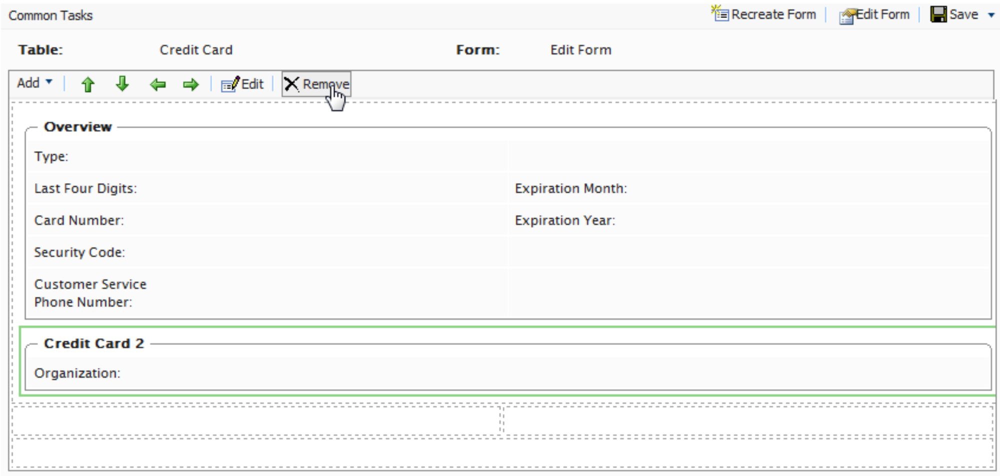


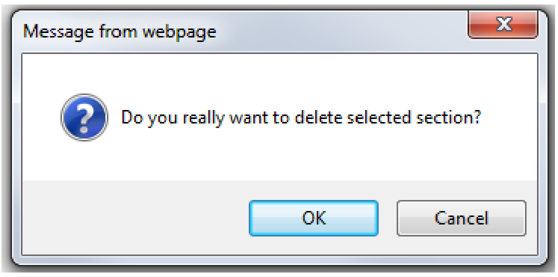
In this example, the "Security Code" field is moved to the right where the "Customer Service Phone Number" field is placed by clicking on the right directional arrow. Fields are moved from cell to cell within a section.



Deleting sections and fields

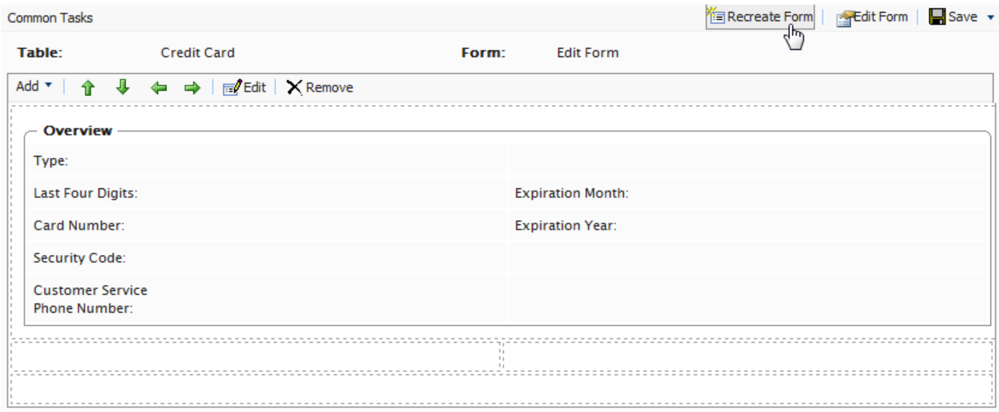
To delete a section or field, highlight either one and click on **Remove**. A popup will appear. Click **OK** to confirm deletion. Otherwise, click **Cancel**.



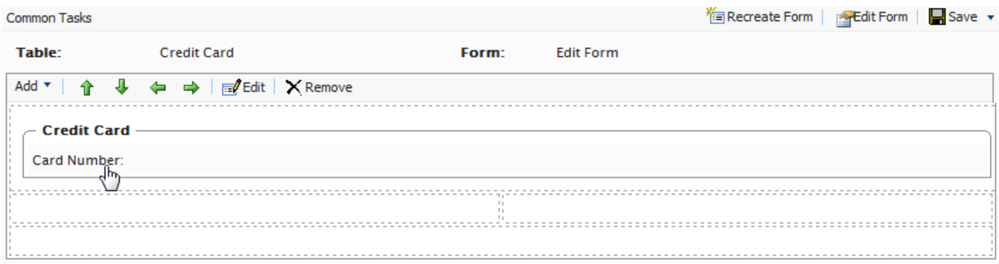


Recreating a form

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.

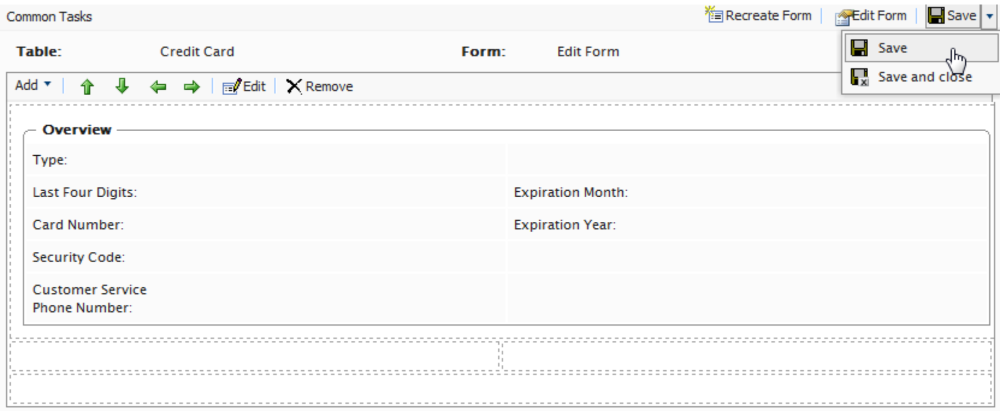


A popup will appear. Click on **OK** to recreate the form. Otherwise, click **Cancel**. Once you confirm, the fields will clear from the form except for the required field.

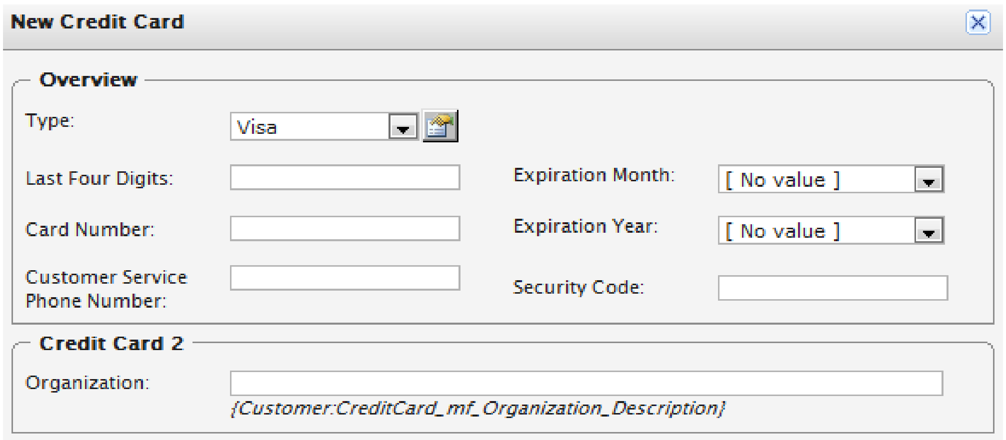


Saving a customized form

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.

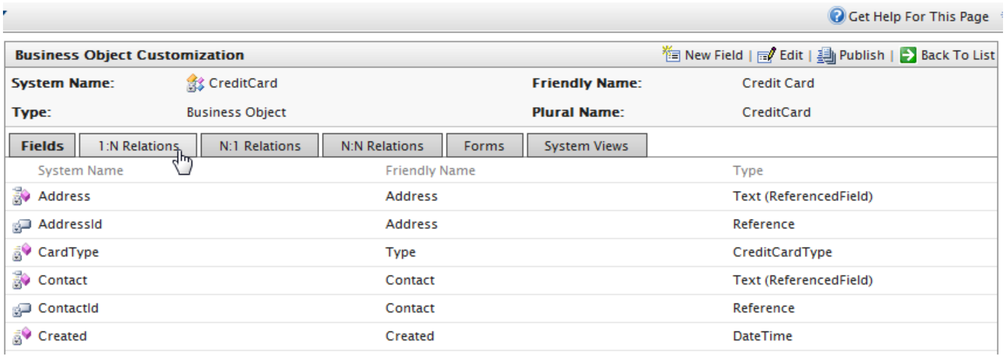
In the following we will describe how to create the various types of relationships between business objects.

Adding a 1 to many relation

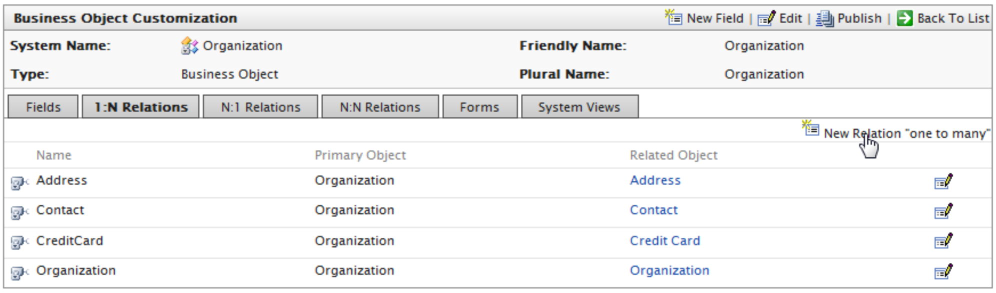
Business Foundation objects allows you to specify **1 to Many Relationships**. For example, if you have one organization, you can relate many types of data to that organization, such as multiple contacts, addresses, or organizational units or divisions within an organization. Within a 1:N relationship,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

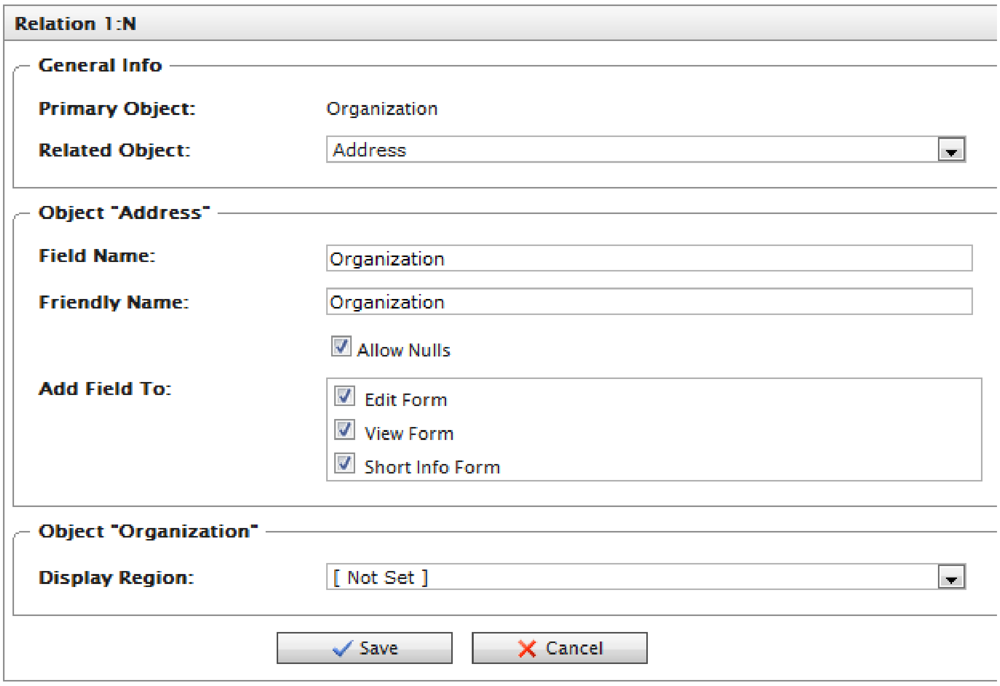


Click on **New Relation "one to many"** to create a new relation.

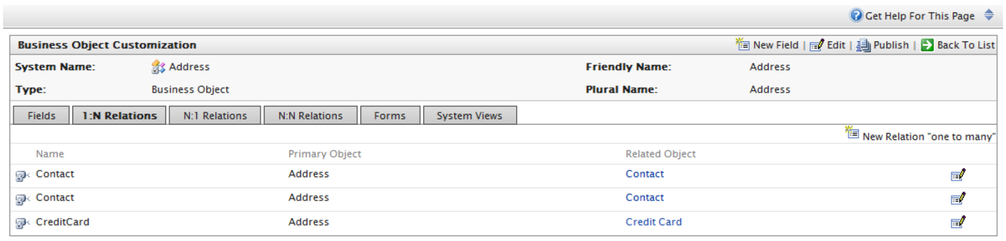


Under **General Info**, the Primary Object Organization is automatically set to Organization.

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**.

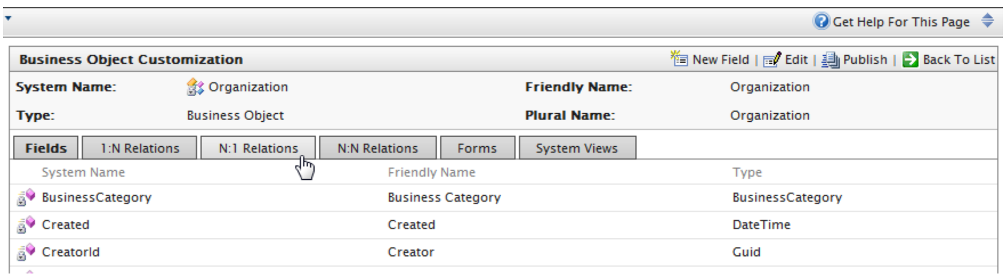


Adding a many to 1 relation

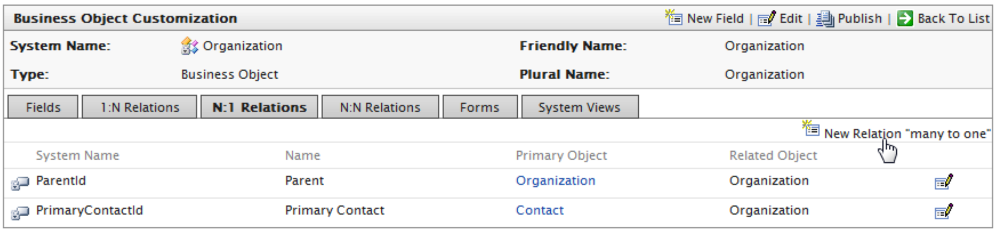
You can relate business objects via a **Many to 1 Relationship**. For example, you can relate multiple contacts to a single organization or unit.

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.



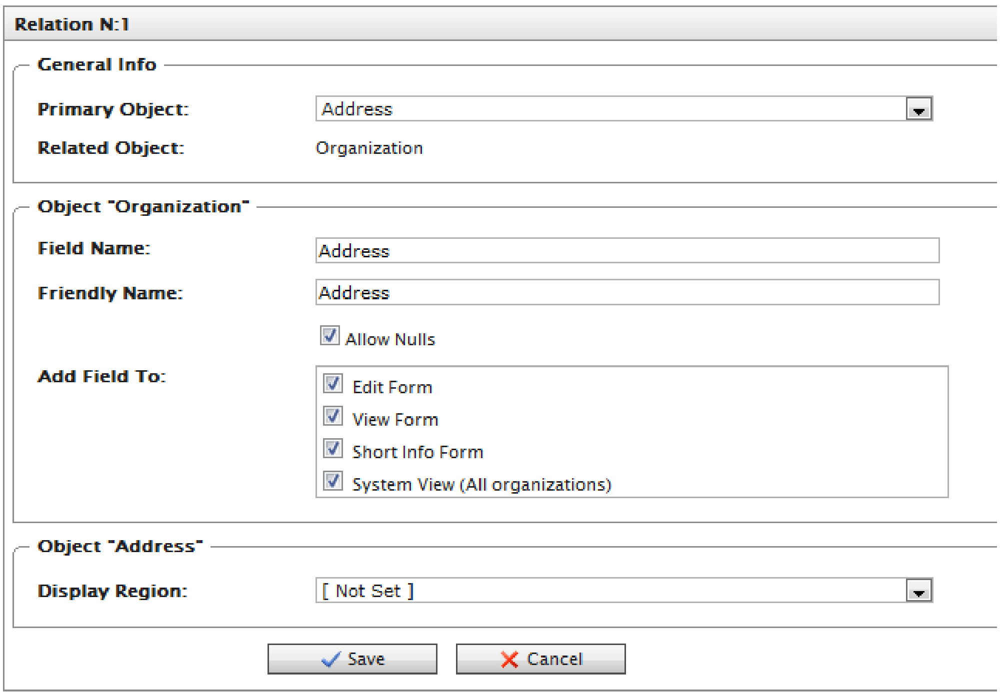
Click on **New Relation "Many to one"** to create a new relationship.



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 con-tact 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**.



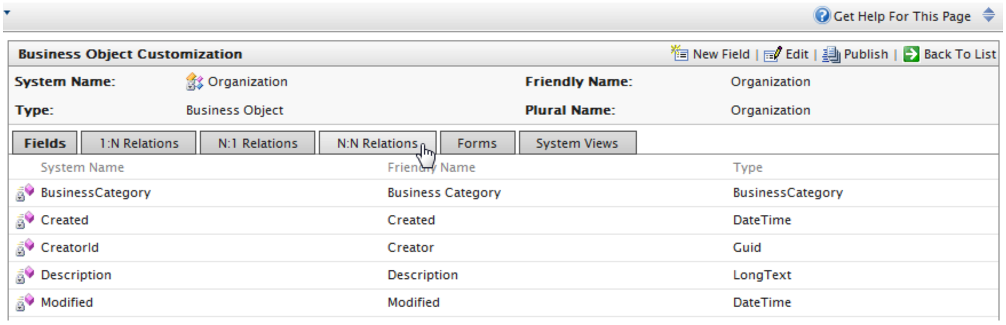
Like an 1:N relationship, if you create a N:1 relationship with a Primary and Related Object, a 1:N relationship is automatically generated for the Primary Object under the **1:N** tab.

Adding a many to many relation

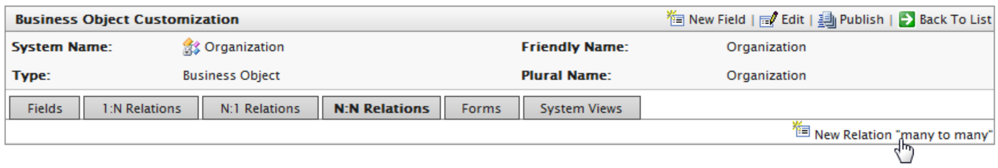
You can also create **Many to Many Relationships** with business objects. For example, many to many relationships help to track different SKUs and their inventory levels with different warehouse locations. Another example is multiple contacts a part of multiple organizations. A Many to Many relationship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



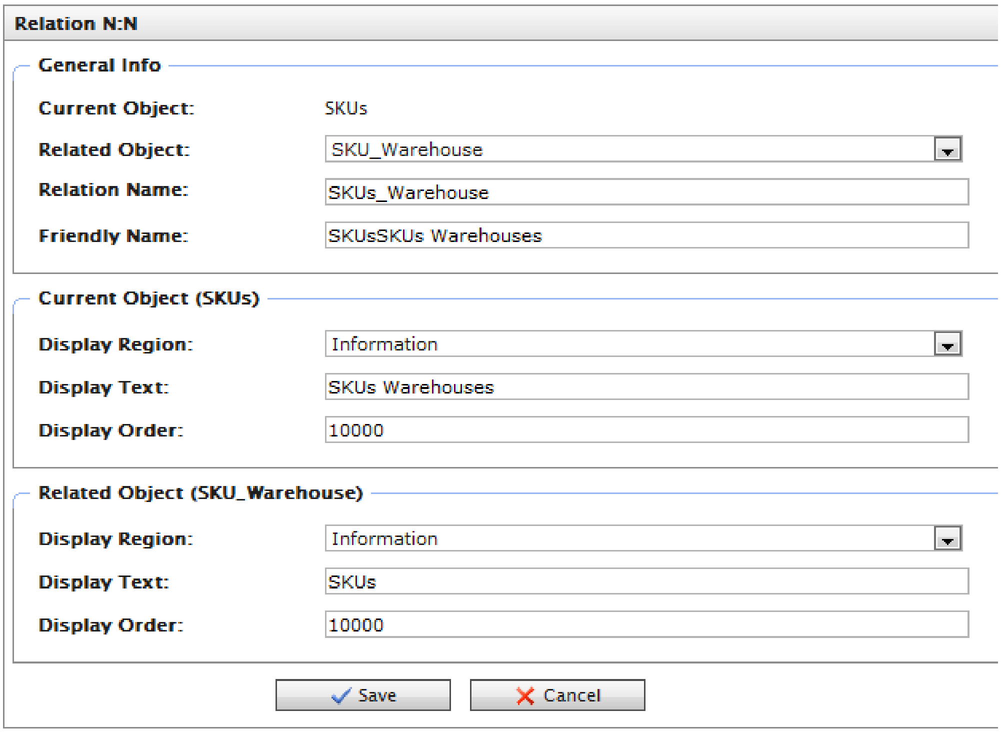
Click on **New Relation "many to many"** to create a new N:N relationship.



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.

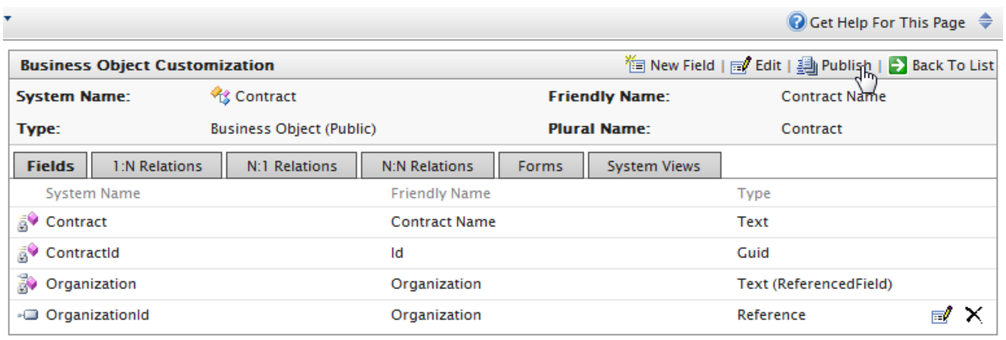
Publishing business objects

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

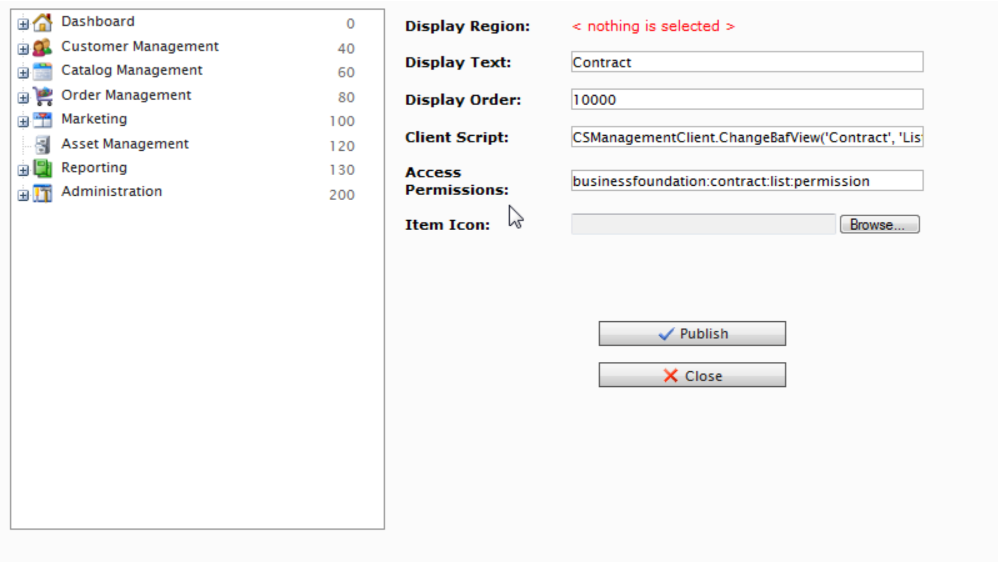
For related information refer also to the section *Customizing the Left Menu*.

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.



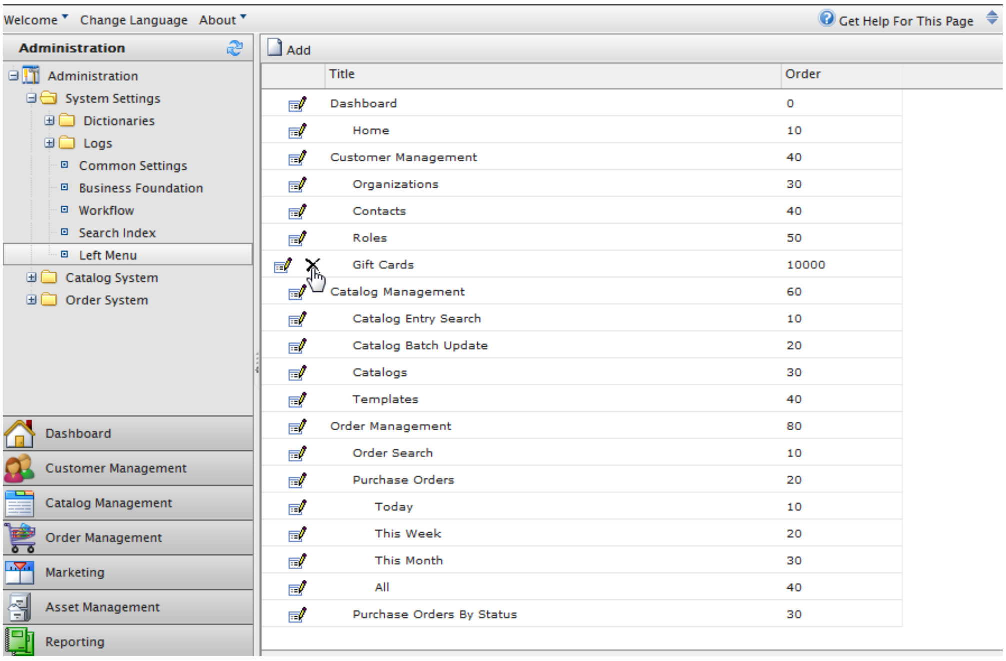
Click **Publish** to publish the selected business object.

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

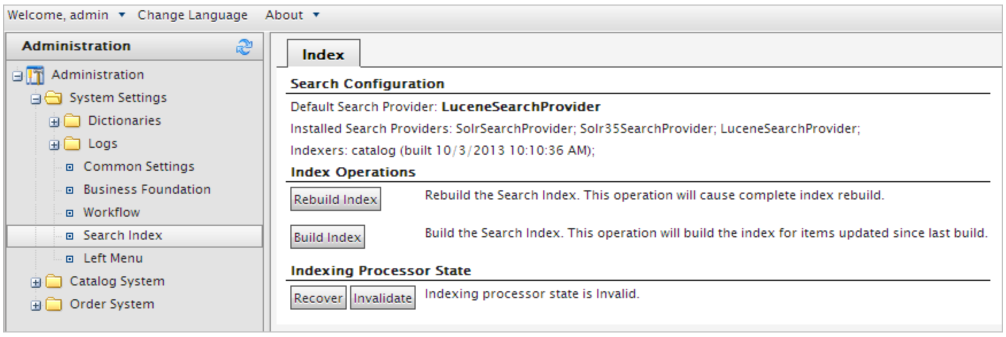
When you have done changes to an existing product catalog, such as adding or deleting products, you will need to index the catalog for those changes to be reflected in the search results.

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.

Customizing the left menu

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).

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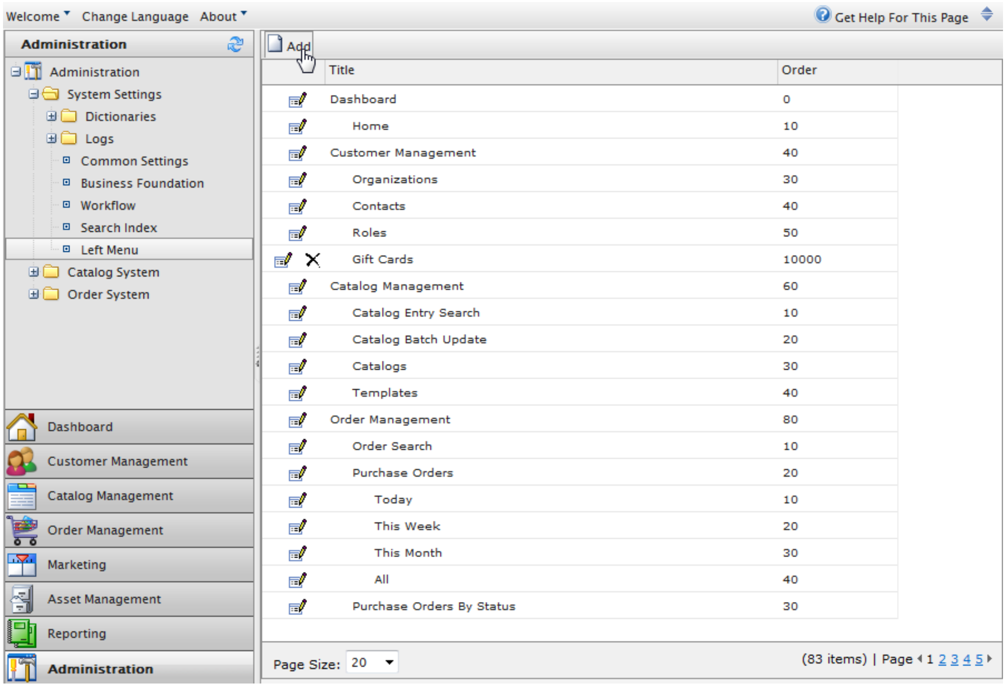
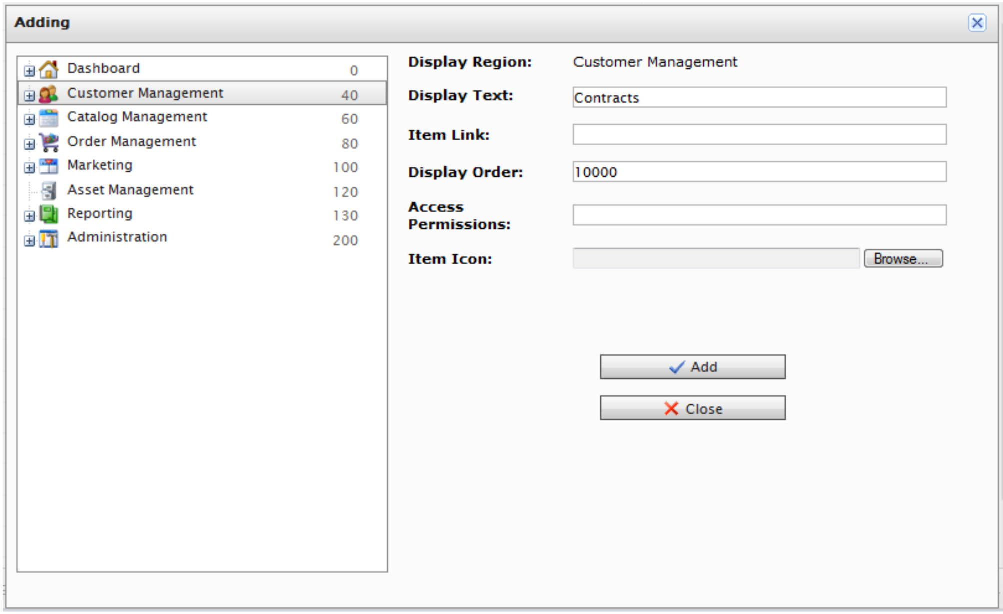
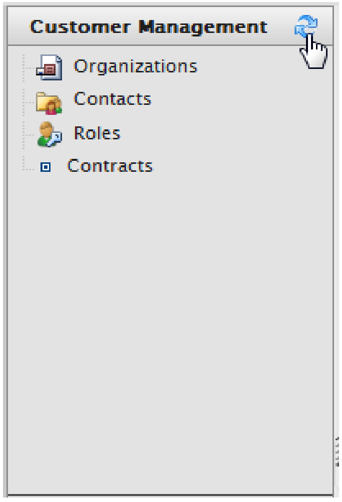


A new window will pop up for publication settings.

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**.

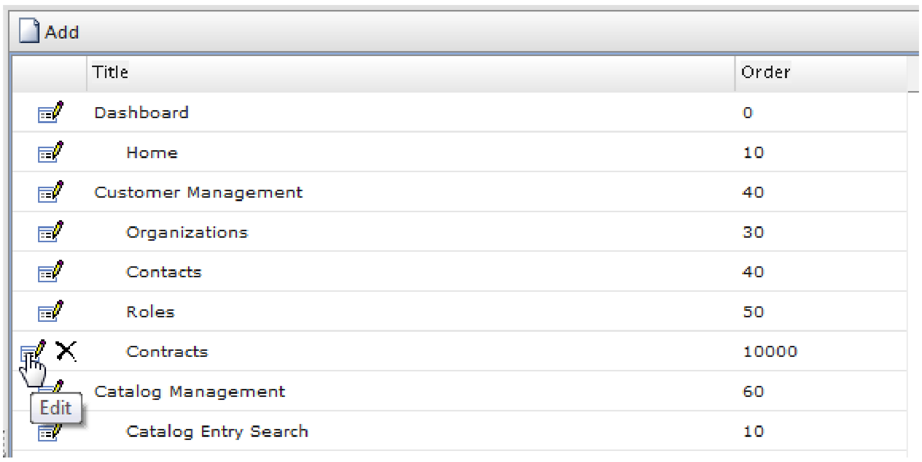


To verify if the object was published, go to the **Display Region** where you specified the object to be published to. Click on the **Refresh** icon on the left navigation frame if at first you do not see the new node.

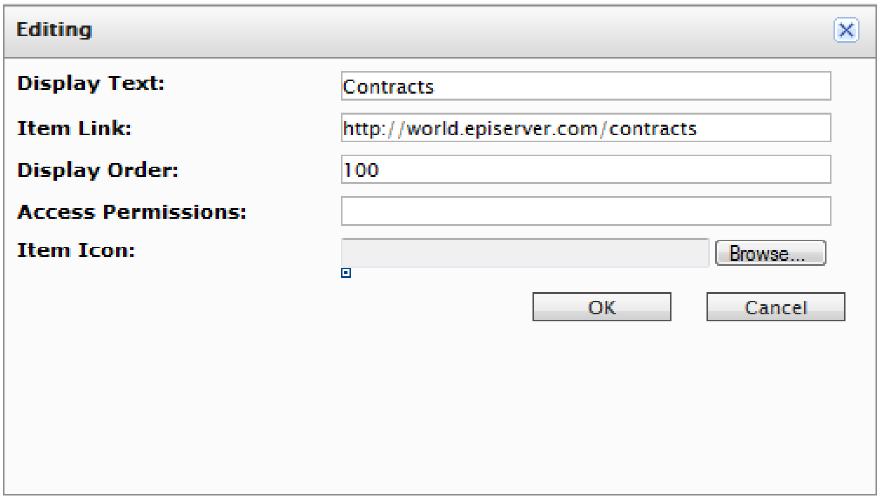


Editing, ordering, or deleting a left menu item

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

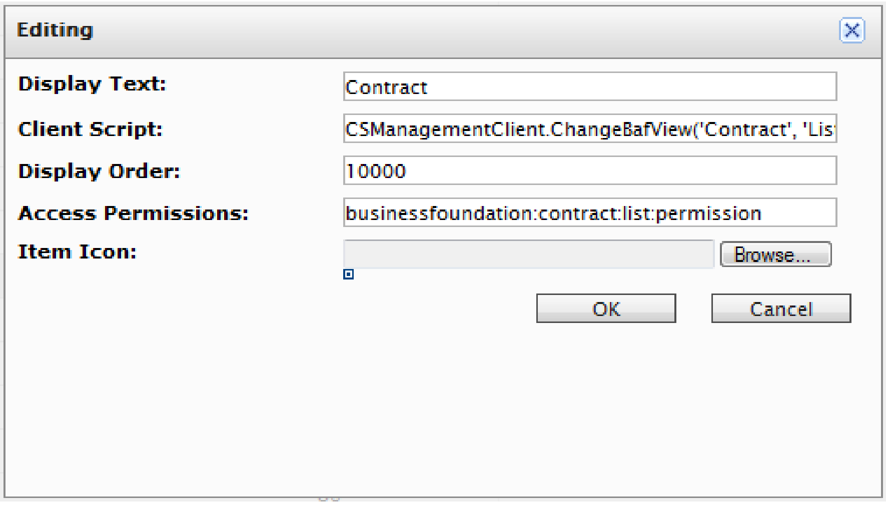


If the left menu item was created via the **Left Menu** page, this popup window will appear.



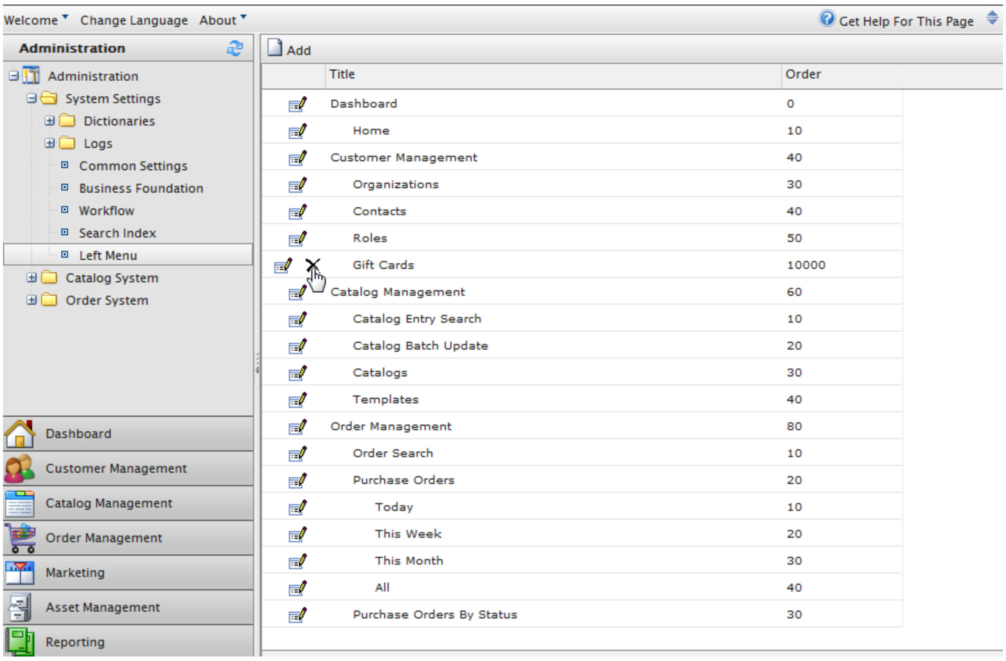
If the left menu item node was created using **Business Foundation**, this popup appears.

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**.

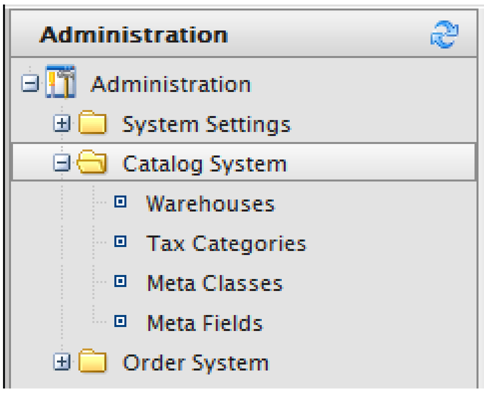
To delete a left menu item, click on **X** icon.



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**.

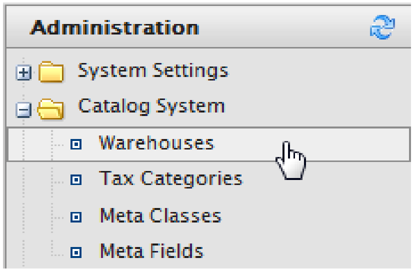
Warehouses

A **Warehouse** is the physical inventory location with an address from where product items are shipped. Items can also be picked-up by customers in designated warehouses. As an e-commerce manager in an organization with many fulfillment centers, you can manage multiple stock locations by defining multiple warehouses in EPiServer Commerce. You can manage stock figures for a product variant (SKU) by warehouse, and you can show total product availability across all warehouses. You can define physical store locations, and depending on how you set up your warehouses you can work with features such as check stock in-store, reserve and pick up in-store and deliver to store. When *creating product variants*, you will specify the warehouse where the item is being stored.

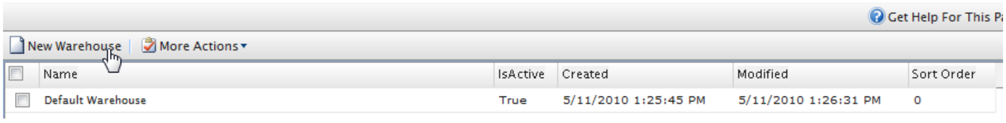
Adding a warehouse

Do the following to add a warehouse or an inventory location:

1. In Commerce Manager, go to **Administration**, expand **Catalog System** and select **Warehouses**.

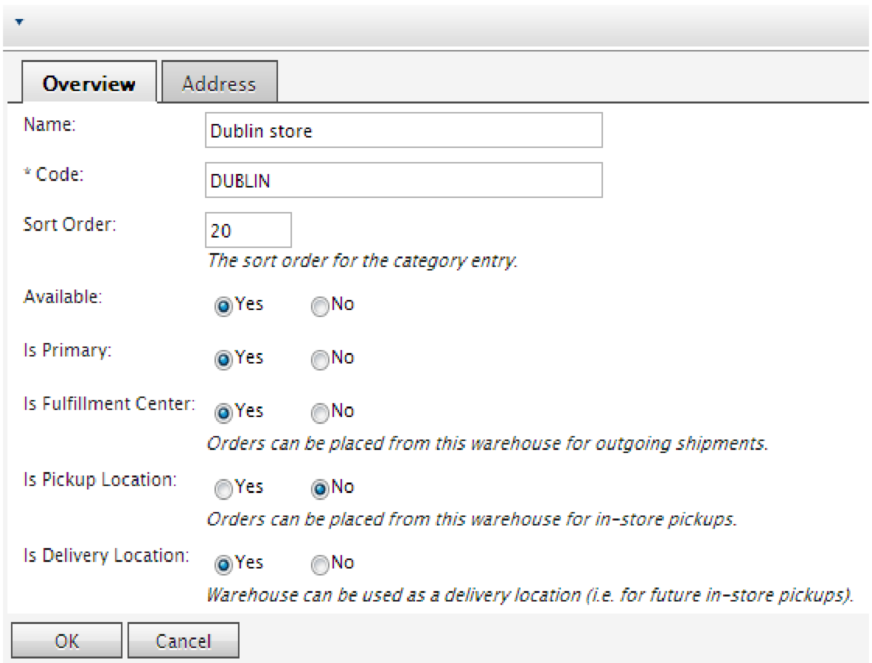


2. The Warehouse List appears. Click on **New Warehouse** on the menu bar.

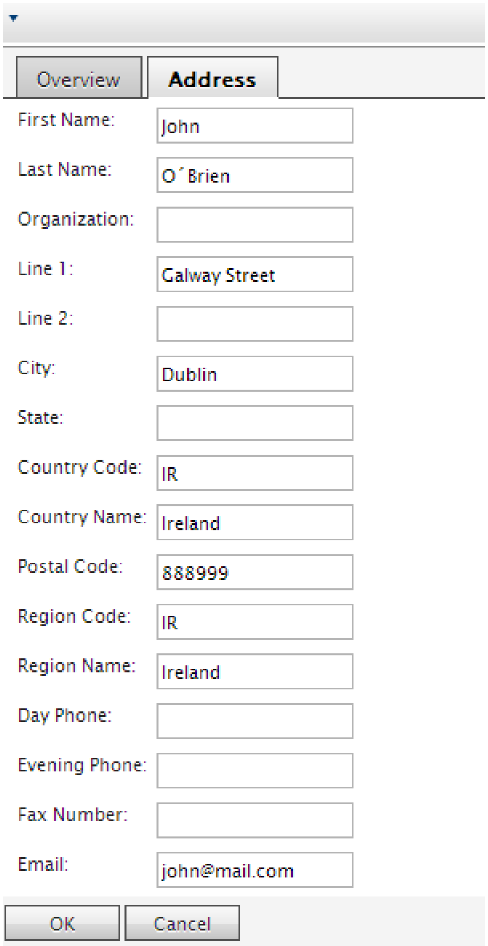


3. Enter information for the **Overview** tab.

   Name - the name of the warehouse.
   Code - the location code for the warehouse.
   Available - select "Yes" to make the warehouse available.
   Is Primary - select "Yes" to make this a primary warehouse.
   Is Fulfillment Center - select "Yes" to make this a fulfillment center where orders can be placed for outgoing shipments.
   Is Pickup Location - select "Yes" to make this a pickup location where orders can be placed for in-store pickups.
   Is Delivery Location - select "Yes" to make this a delivery location which an be used for future in-store pickups.



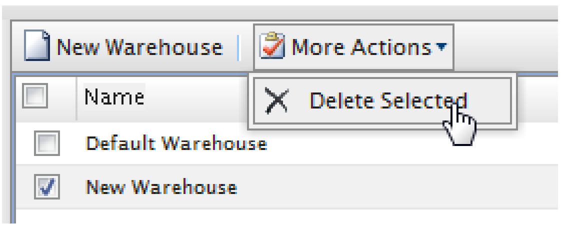
4. Enter relevant information for the **Address** tab.



5. Click **OK** to save your changes. The warehouse will appear in the list.

Deleting a warehouse

Select the warehouse(s) to be deleted in the warehouse list, then click **More Actions** and select the **Delete Selected** options..



Click **OK** to confirm the deletion.

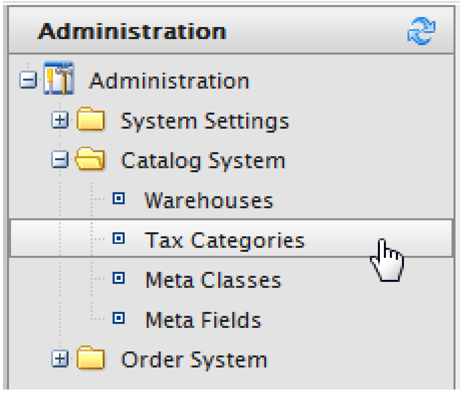
Tax categories

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. You can for instance add a tax category "luxury items" for specific products, or VAT for different regions.

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

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*.

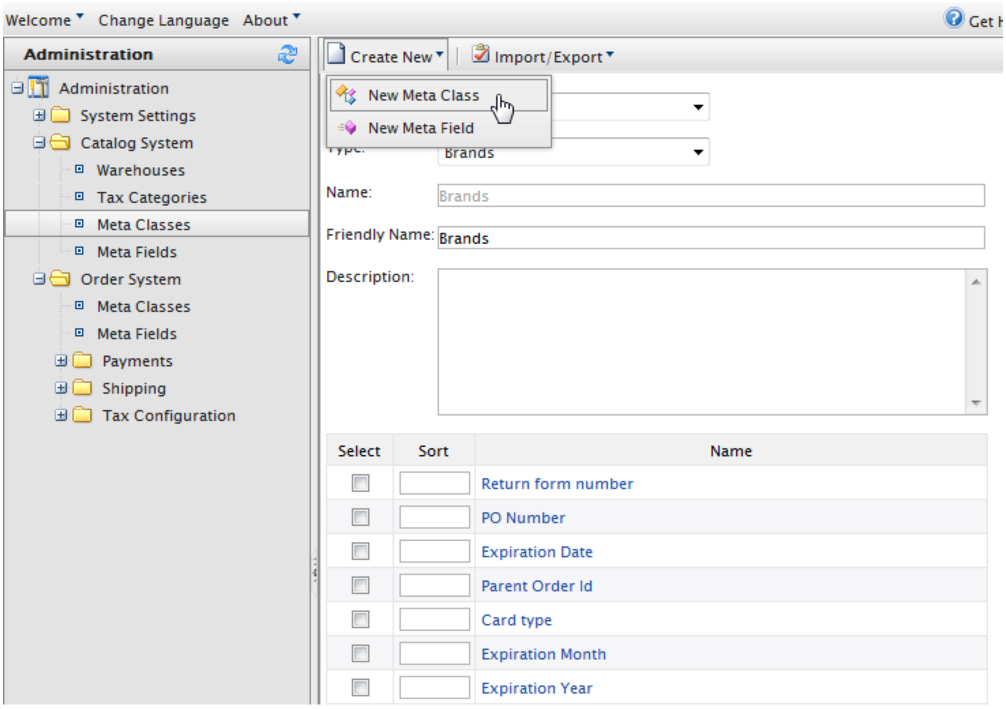
Refer also to the section *Using Meta Classes and Meta Fields* for catalog attributes.

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.

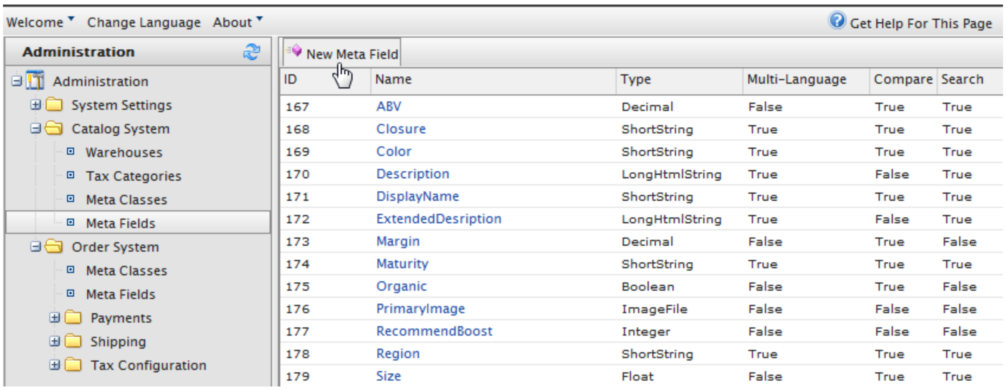
If you select the meta class you will see all of the available meta fields listed below, but with none selected. Next steps will be to create and apply desired meta fields.

Creating a meta field

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

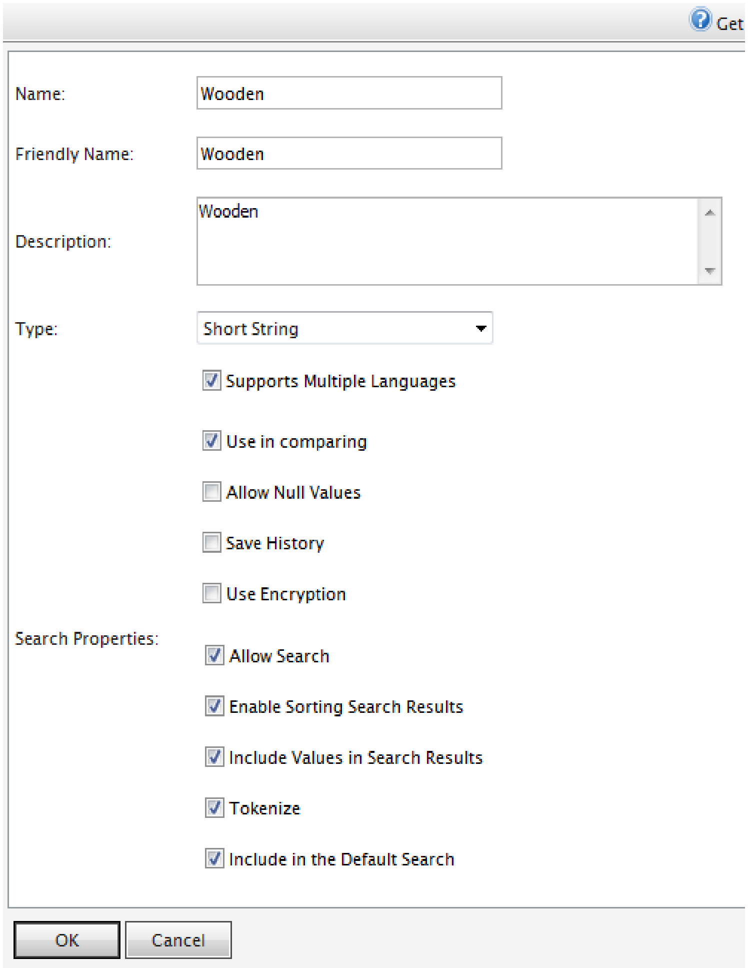
1. Navigate to **Administration**, **Catalog System** and select **Meta Fields**. This will open the **Meta Fields** page.

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).
Descrip-tion	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.

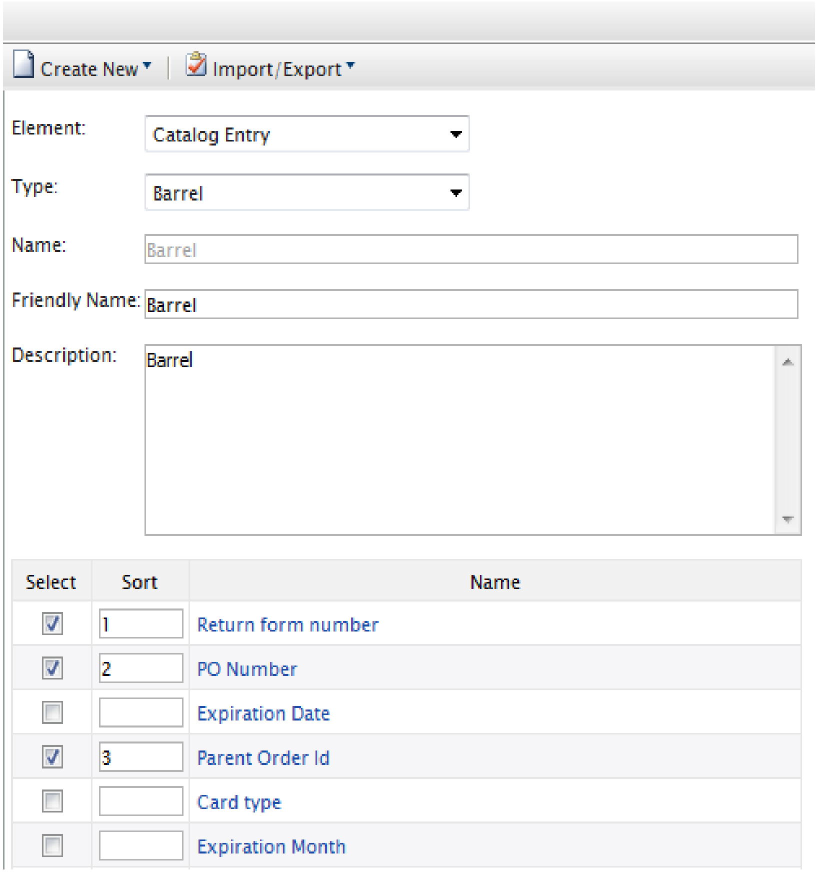
4. Click **OK** to save your changes. The newly added meta fields will be listed in the meta fields list.

> 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.

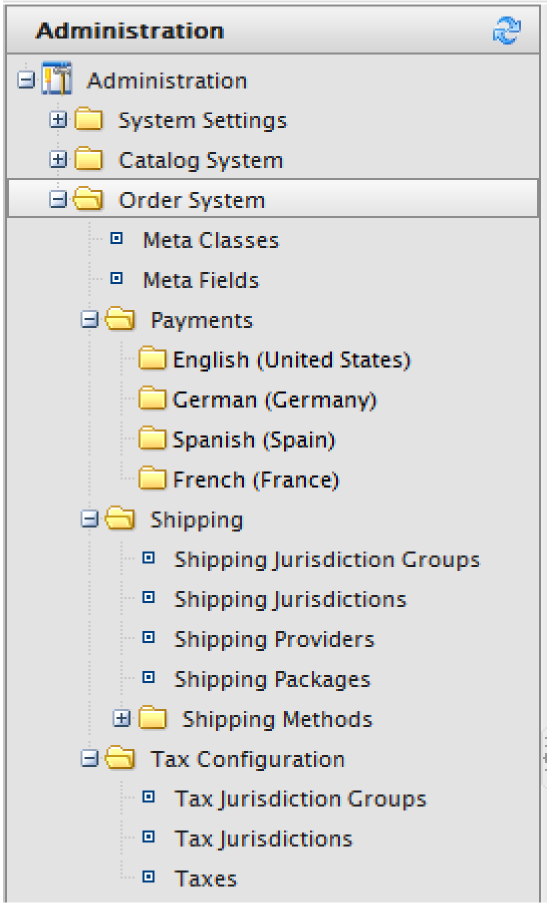


4. Click **OK** to save your changes.

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

Payments is an essential part of an e-commerce system. When shopping online customers will be presented with a number of different payment options. You can also customize market specific payment methods, to be used for *specific markets*. 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, gateways and methods

Payment types are **meta classes** which contain the properties for a particular payment type. For example, a credit card payment type contains credit card number, card expiration date and card type. Some payment types are built-in to EPiServer Commerce:

- Payment by phone
- Exchange payment
- Credit card payment

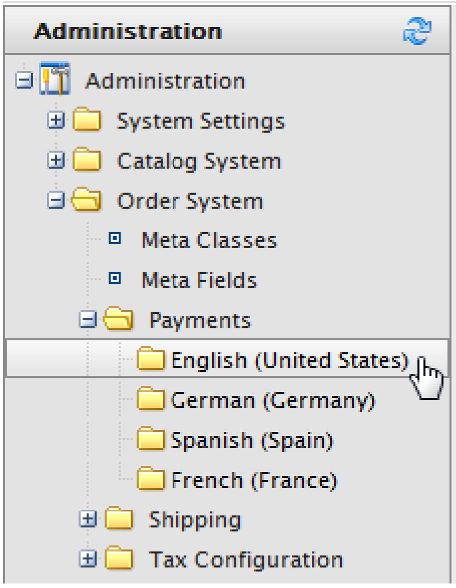
In addition, a generic "OtherPayment" class type is included in EPiServer Commerce. There are also additional payment providers available as modules for EPiServer Commerce.

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

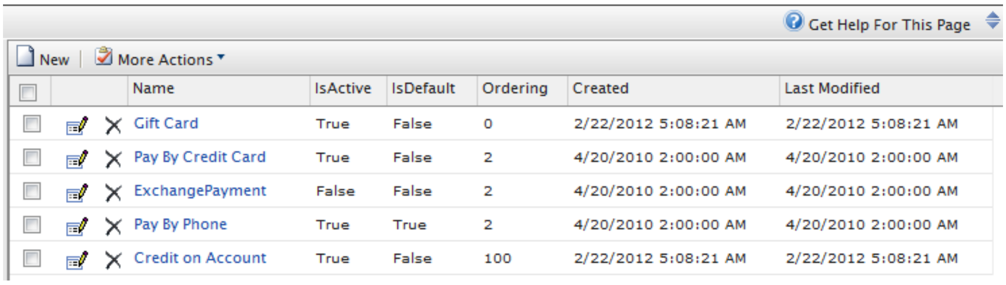
Payment methods contain information about the way the customer **views a payment option** and has a payment gateway associated with it.

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.

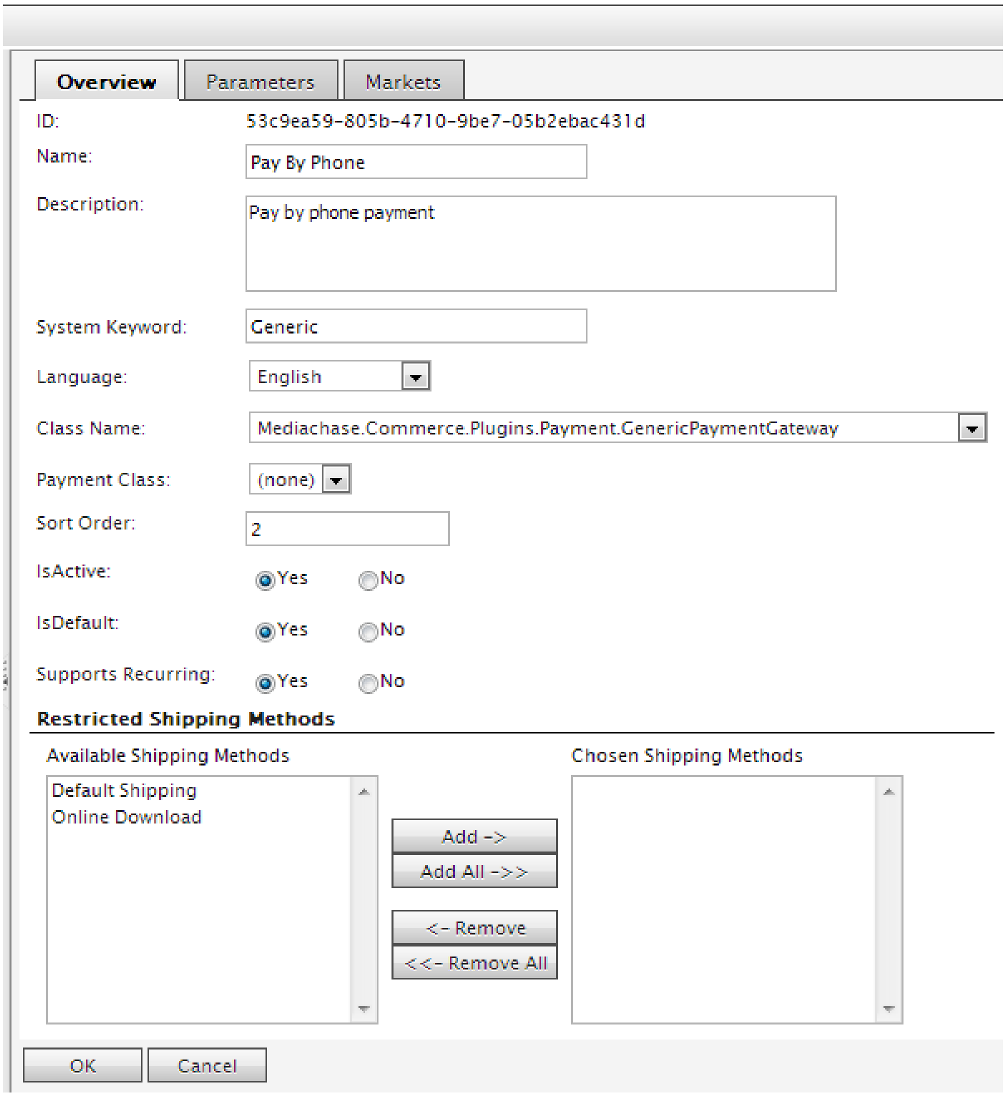


The **Payment Methods** window appears, displaying available payment methods for the selected language.



Create a payment method

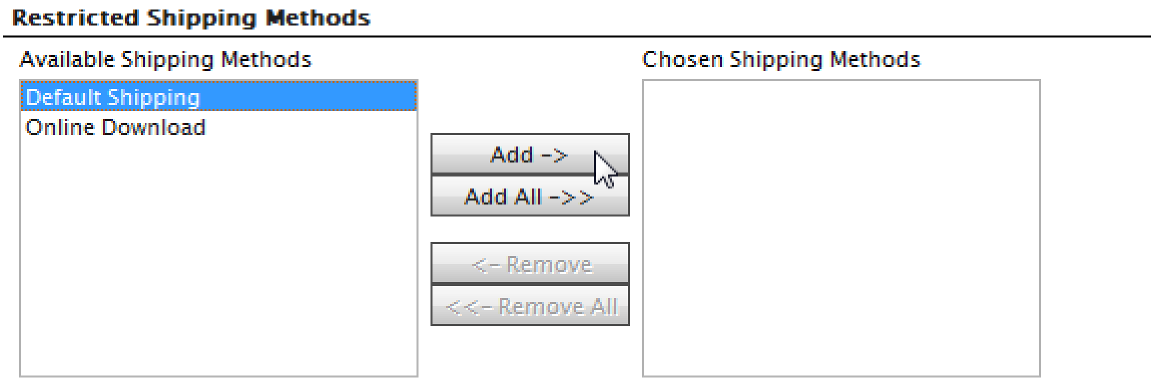
To create a new **Payment Method**, click on **New** to open the **Payment Method Edit** screen.

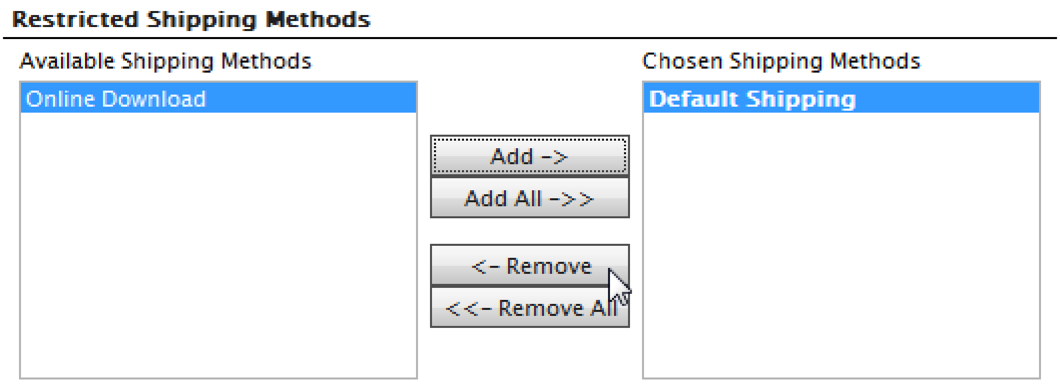


Explanation of payment method properties:

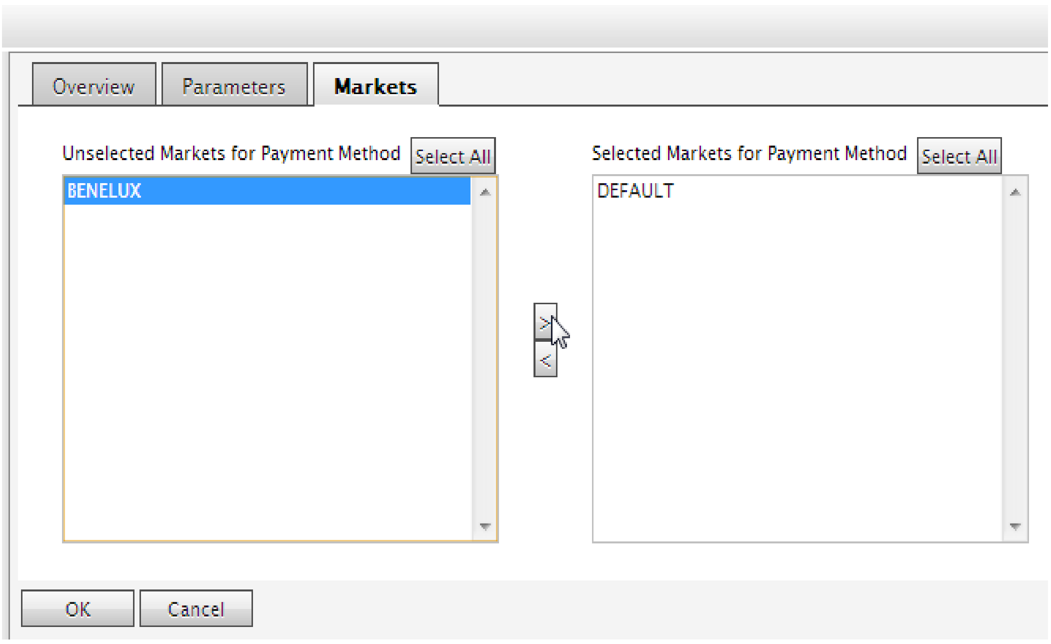
- **ID** – the system-assigned unique identifier for the payment gateway.
- **Name** – the name to be displayed to the user.
- **Description** – a description that can be displayed to the user.
- **System Keyword** – the unique name for each instance of the gateway; new non-unique keywords will not save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

    - **Restricted Shipping Methods** – restricted shipping methods is not fully implemented out of the box and requires a developer to complete the functionality.

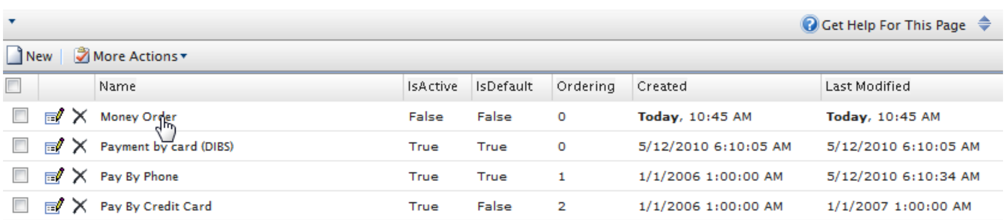




Under the **Markets** tab you can select the markets where the paymnet method should be available. Note that *markets must be defined* before they can be made available for selection.



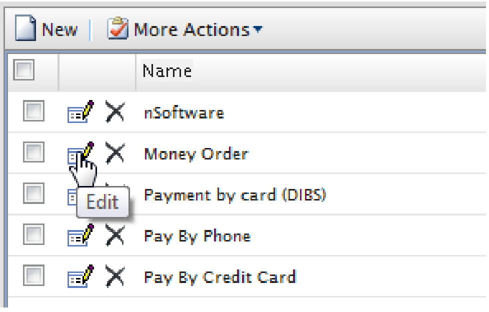
Click **OK** to save the **Payment Method**. The payment method will appear in the list of Payment Methods.



For a payment method to appear it has to be **all** of: (1) assigned to the market, (2) assigned to a language that is valid for the market, **and** (3) assigned to a language that is valid for the site.

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.

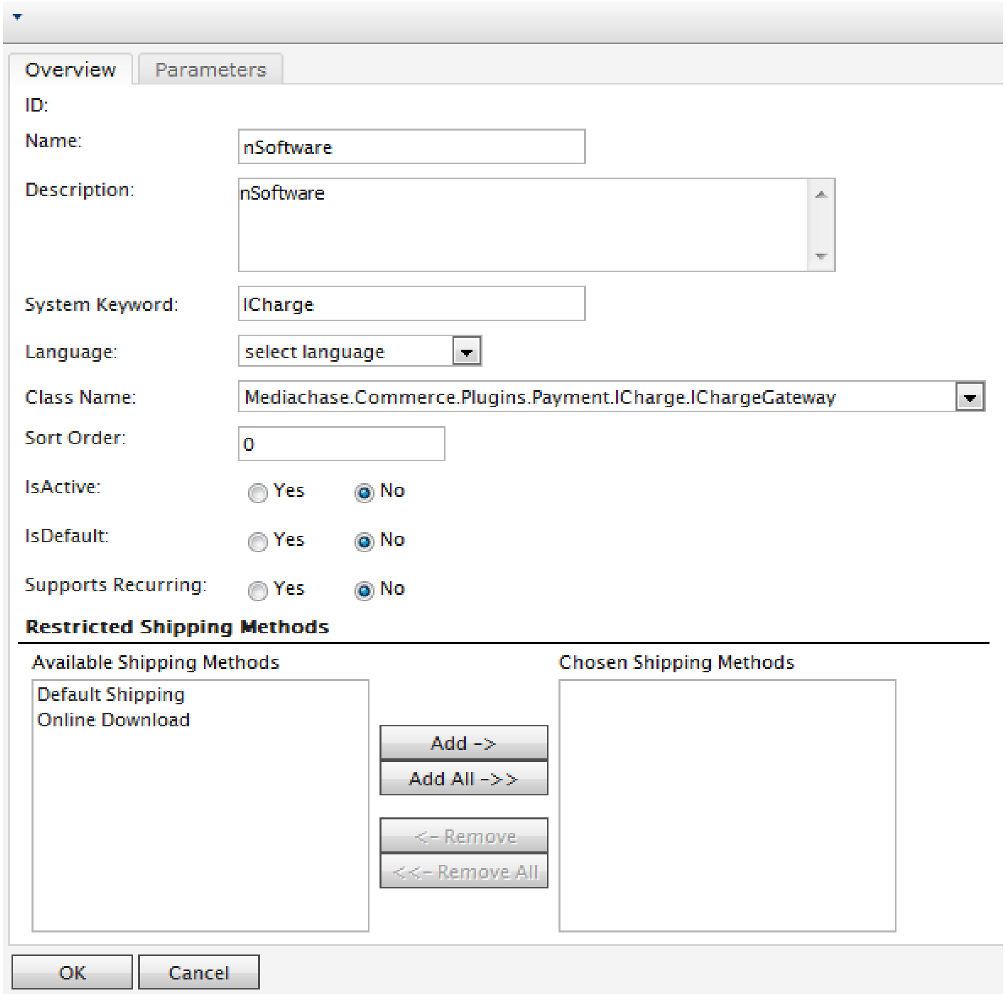
Deleting payment methods

To delete **Payment Methods**, click on the **X** icon next to the payment method name and click **OK** when the pop-up 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 pop-up appears.

Using nSoftware provided payment gateways

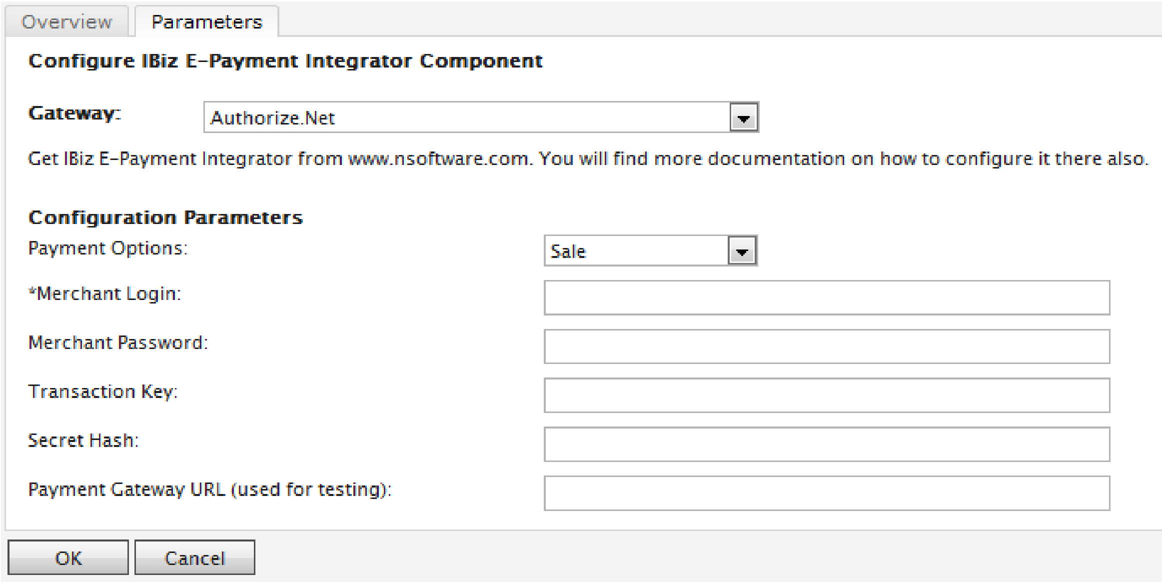
EPiServer Commerce supports multiple payment gateways out of the box using **nSoftware** where new payment methods can easily be set up by end-users.

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.**



Shipping

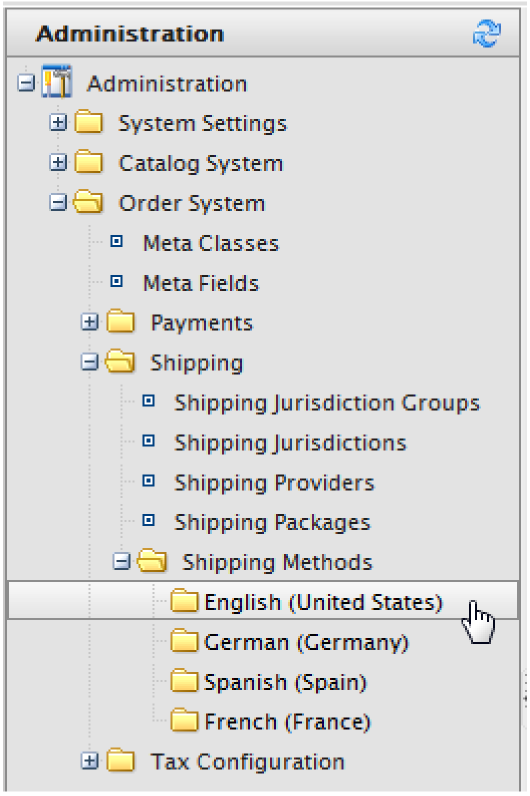
Shipping involves everything related to the actual physical delivery of products to e-commerce customers. Just as for *payments*, you can set up shipping methods, gateways and providers. In the following the terminology is described as well as the different configuration possibilities for shipping.

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

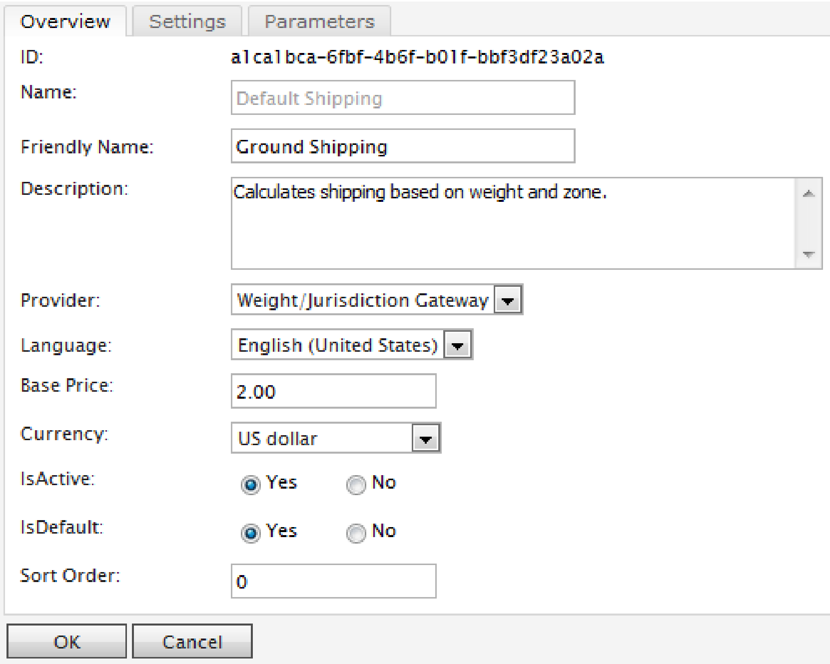
A **Shipping Method** manages a set of information and rules that determines the shipping cost and displays it on the front-end site while a customer checks out an item from his/her shopping basket. The shipping fee is added to the total price of the purchase.

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.

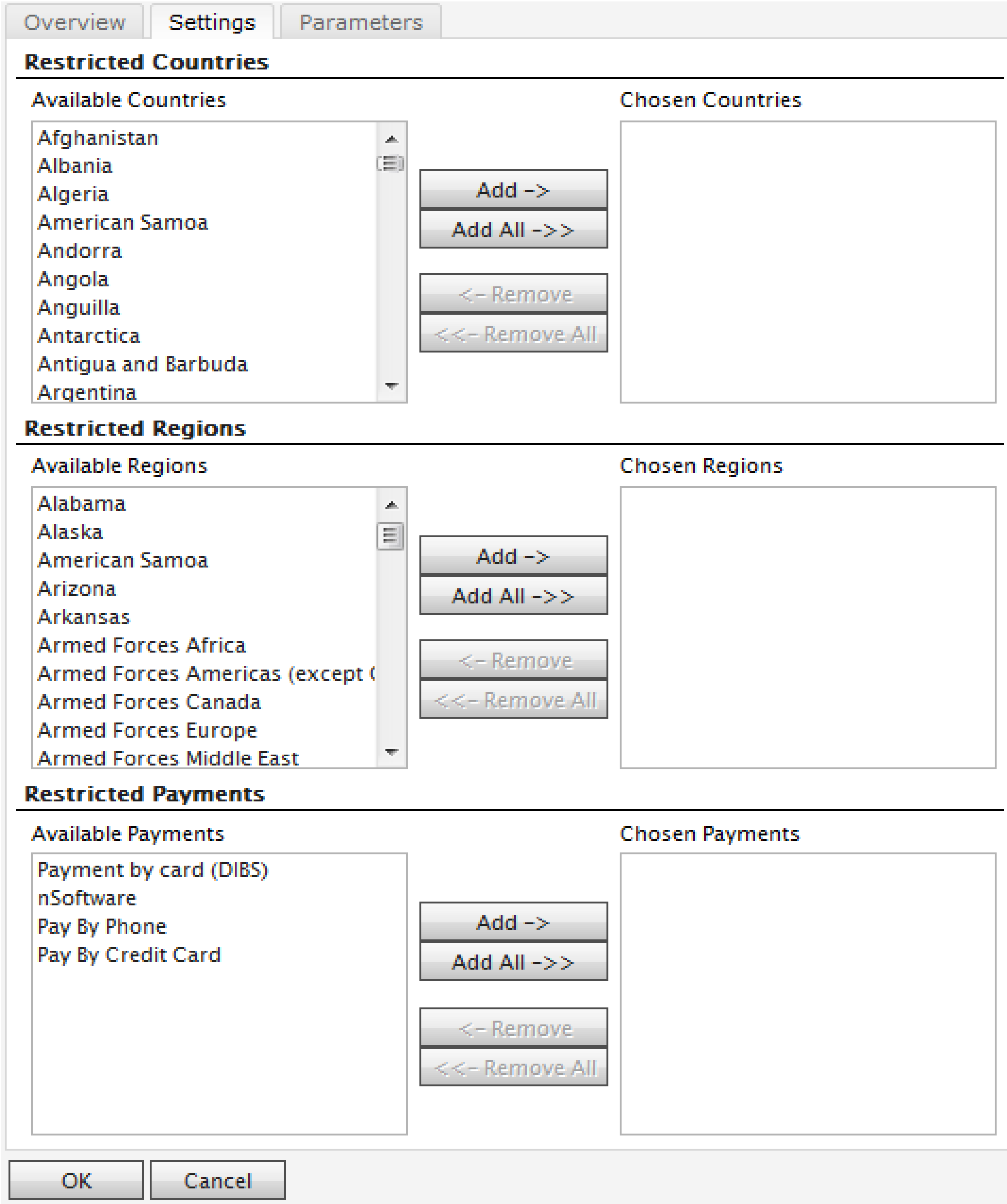
At the **Shipping Methods List** screen, select the edit icon for either of the available methods. The **Overview** tab screen for **Shipping Method Edit** will load with the below fields:



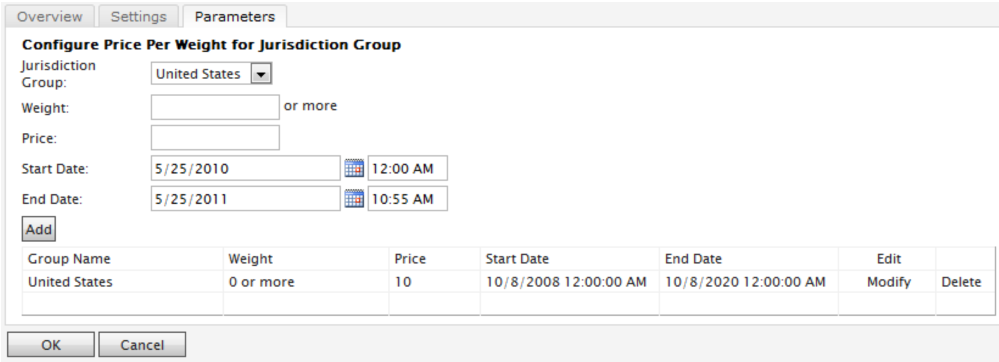
- **ID** - this is auto-generated after saving the new shipping method
- **Name** - enter in a name without spaces or special character; this name will not be displayed in the public site, but is only for end users to manage and organize the shipping methods
- **Friendly Name** - enter a friendly name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



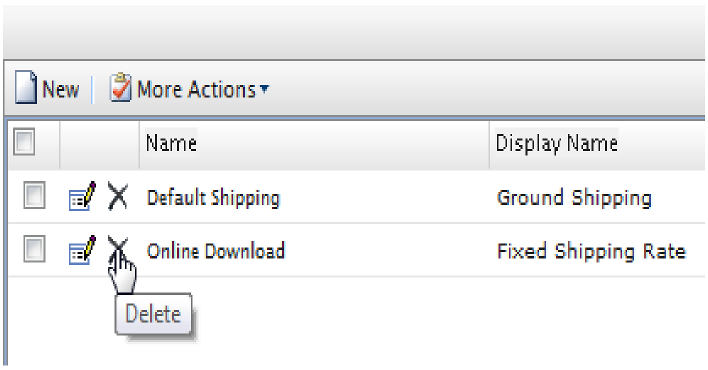
- **Jurisdiction Group** - select a jurisdiction group to apply the current **Shipping Method** using the drop-down menu; the options listed here are set up in the **Shipping Jurisdictions** and **Shipping Jurisdiction Groups** screen.
- **Weight** - enter a numerical value for the weight; units for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

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.

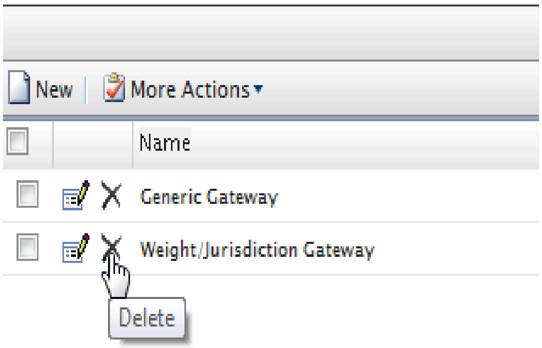
1. Edit **Name**, and **Description**.
2. **System Keyword (no spaces)** and **Classes** are something that your developers need to code and provide.
3. Click **OK** to save changes.

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

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

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".

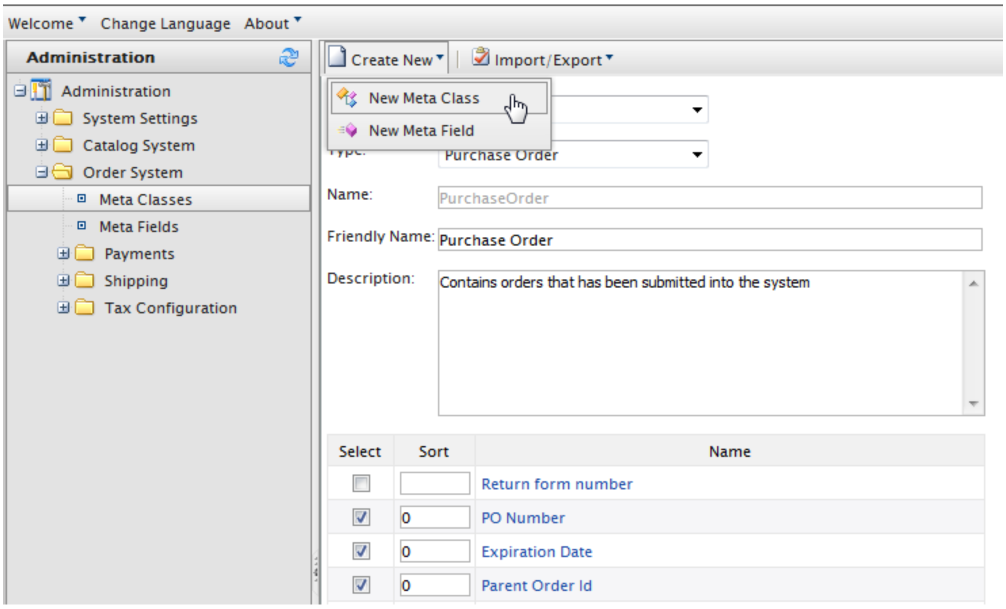
When meta fields and classes have been created in the System Administration part of Commerce manager, they will be available for usage when working with catalog items and orders.

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**.

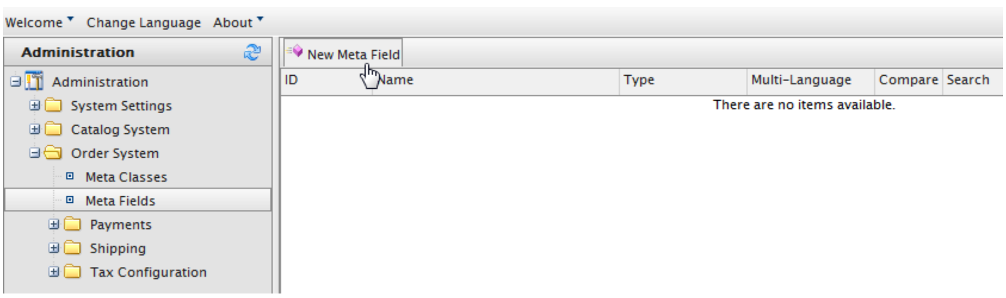
If you select the meta class you will see all of the available meta fields listed below, but with none selected. Next steps will be to create and apply desired meta fields.

Creating a meta field

Do the following to create meta fields and customize the attributes of an order meta class:

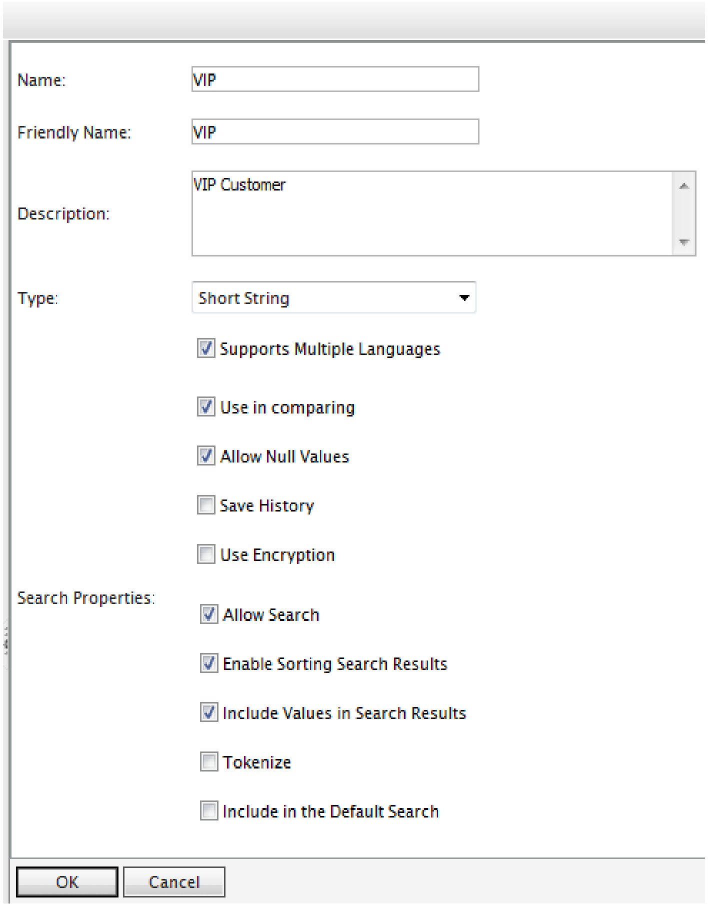
1. Navigate to **Administration**, **Order System** and select **Meta Fields**. This will open the **Meta Fields** page.

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.

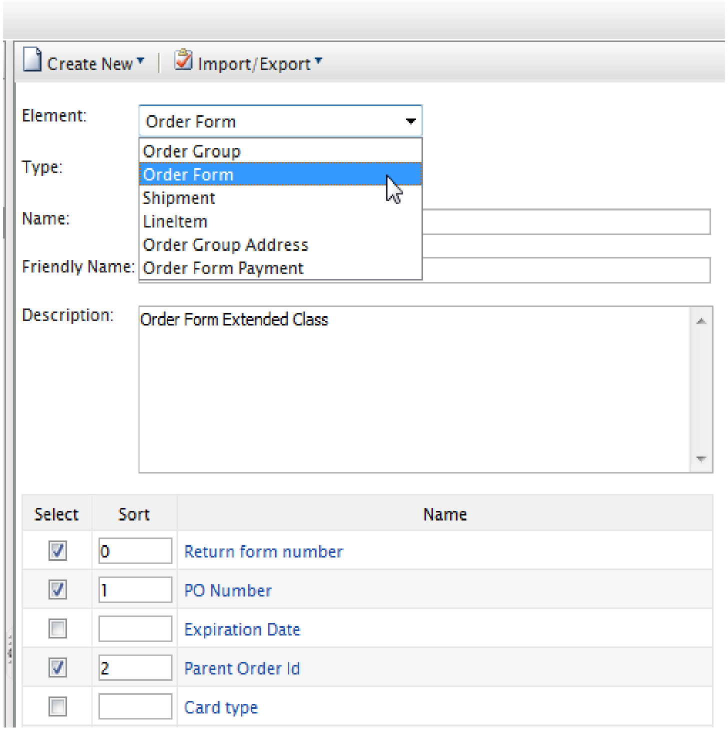
If newly created meta fields are not immediately visible, go to the next page or set the **Page Size** to display more entries.

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

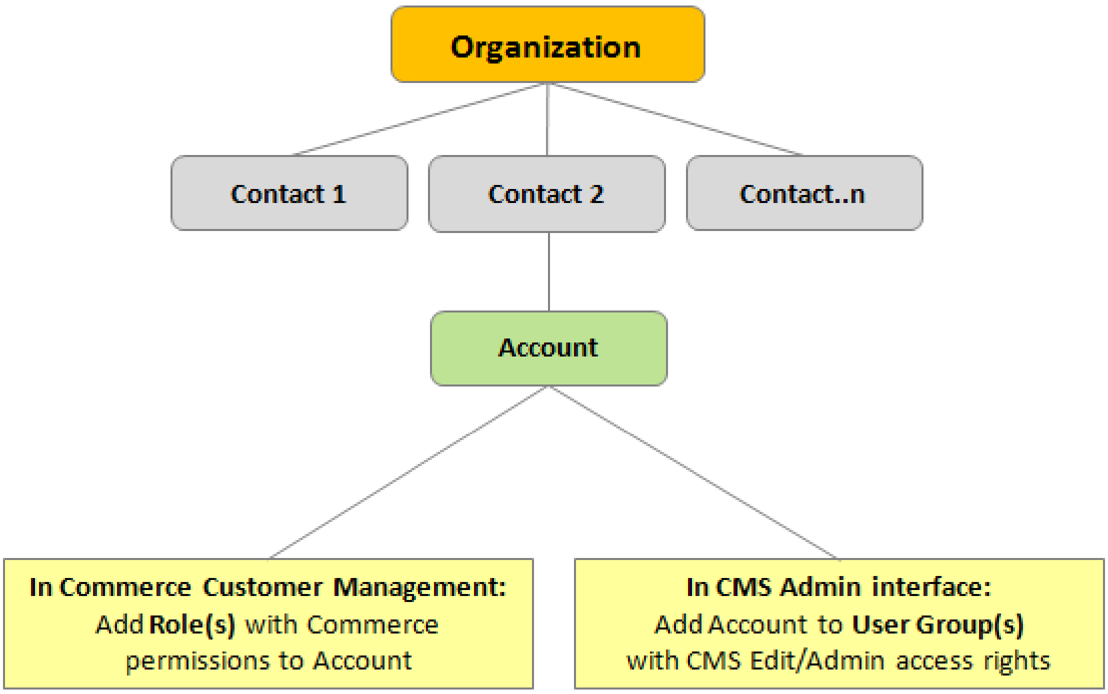
Access right management involves setting permissions for users working with content in Commerce and CMS. These may or may not be the same individuals, depending on the size and setup of the organization. A "marketer" for instance may *work with campaign pages in CMS* as well as enriching product content in Commerce. A "merchandiser" may work with pricing information and categorization of catalog entries in the *catalog interface* in Commerce. Refer to *Roles and tasks* for more information about users in EPiServer Commerce.

> When installing EPiServer Commerce, an administration account with login credentials "admin/store" is created, which has full access to all Commerce subsystems. Therefore it is highly recommended that you **change this password directly after installation**. Note also that you need administrative access rights in both CMS and Commerce Manager to manage users.

Contacts and accounts

The user administration in the Commerce Manager back-end system is based on **contacts**. A "contact" can be a (registered) customer shopping on the website, as well as a someone working with the system, editing website content or managing online store tasks.

When an online customer 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.



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, which is where you set access rights for editing website content.

Managing users

Contacts, accounts and organizations in Commerce 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 procedure for adding users working with Commerce and CMS is described below. When a user has been created in the system, you can set the desired access rights, depending on whether the user is going to work with CMS, Commerce Manager, or both.

> A user with an account created in Commerce Manager will be available in CMS, whereas a user created in CMS will **not** be available in Commerce Manager. This means that users must be created in Commerce Manager first, to be able to work with **both** CMS and Commerce Manager.

Creating a user with access to both Commerce and CMS

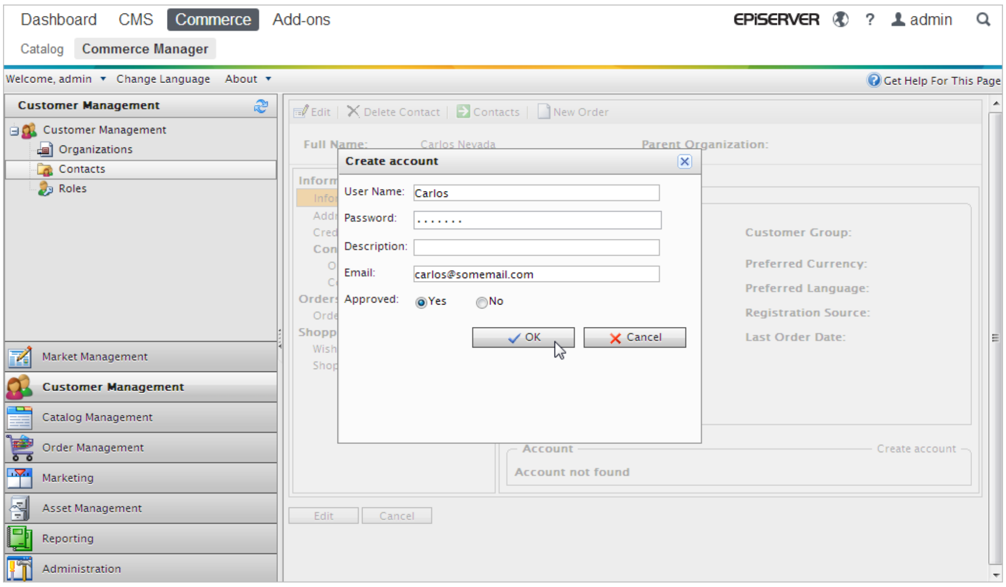
A user, for instance a merchandiser or marketer that will be working with both CMS and Commerce Manager, will need the following:

- A **user account (contact)** in Commerce Manager.
- The **Admins or one or more of the other roles** (see below) in Commerce Manager, to access Commerce Manager functionality.
- Membership in the **CommerceAdmins** group to access the Catalogs user interface and Commerce Manager. This can also be provided through membership in the **WebAdmins** group. However this group also gives access to the entire website administration interface which usually will be restricted to very few users.
- Membership in the **WebEditors** group to access the CMS Edit view for working with content.
- Membership in one or more "structure" groups (see below) to provide access rights to edit in the CMS page tree.

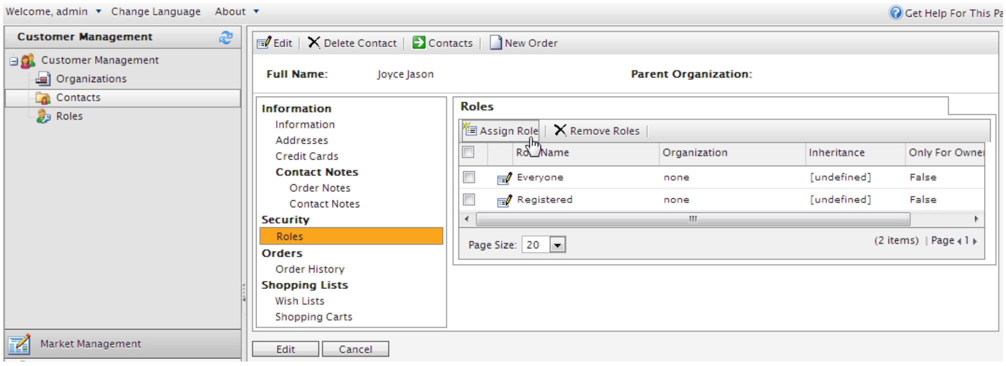
> Note that the **CommerceAdmins** group needs to be created in the CMS administration view, before you can add users to it. Go to the **CMS Admin** view and **Set Access Rights**, and add the group "CommerceAdmins" under **Administer Groups**.

Follow the steps below to create a user with access to both the CMS edit view as well as Commerce Manager, but not the website administration interface.

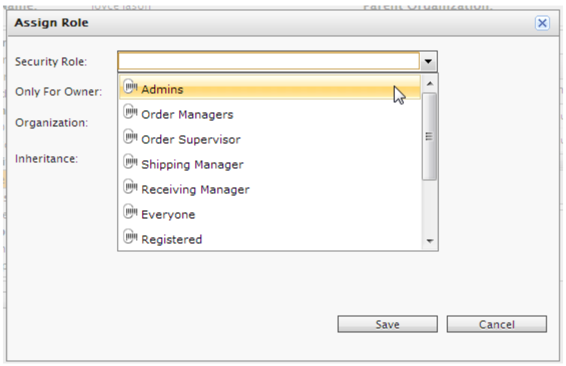
1. In Commerce Manager, go to **Customers** and *create a contact with an account*.



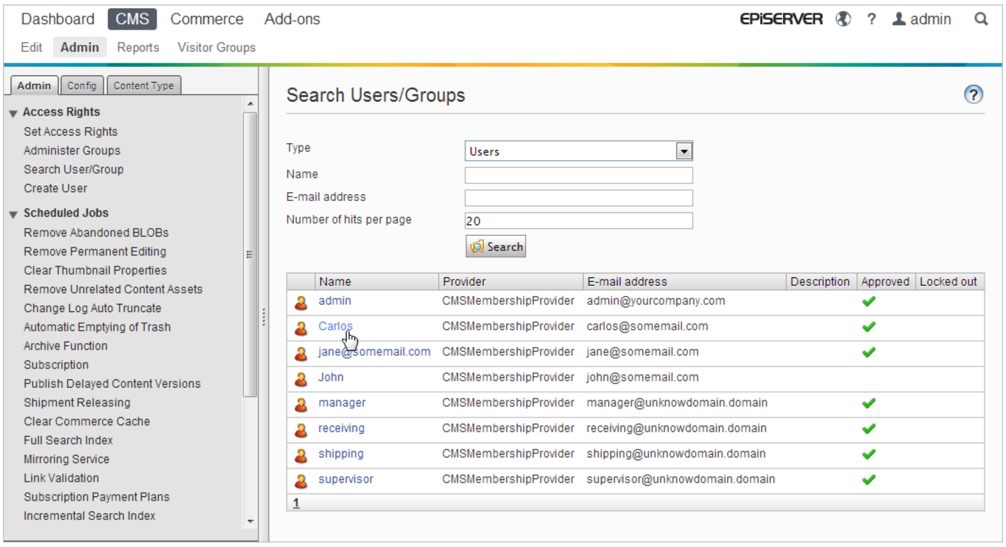
2. Click the **Roles** option under **Security** for the contact, and then **Assign Role**.



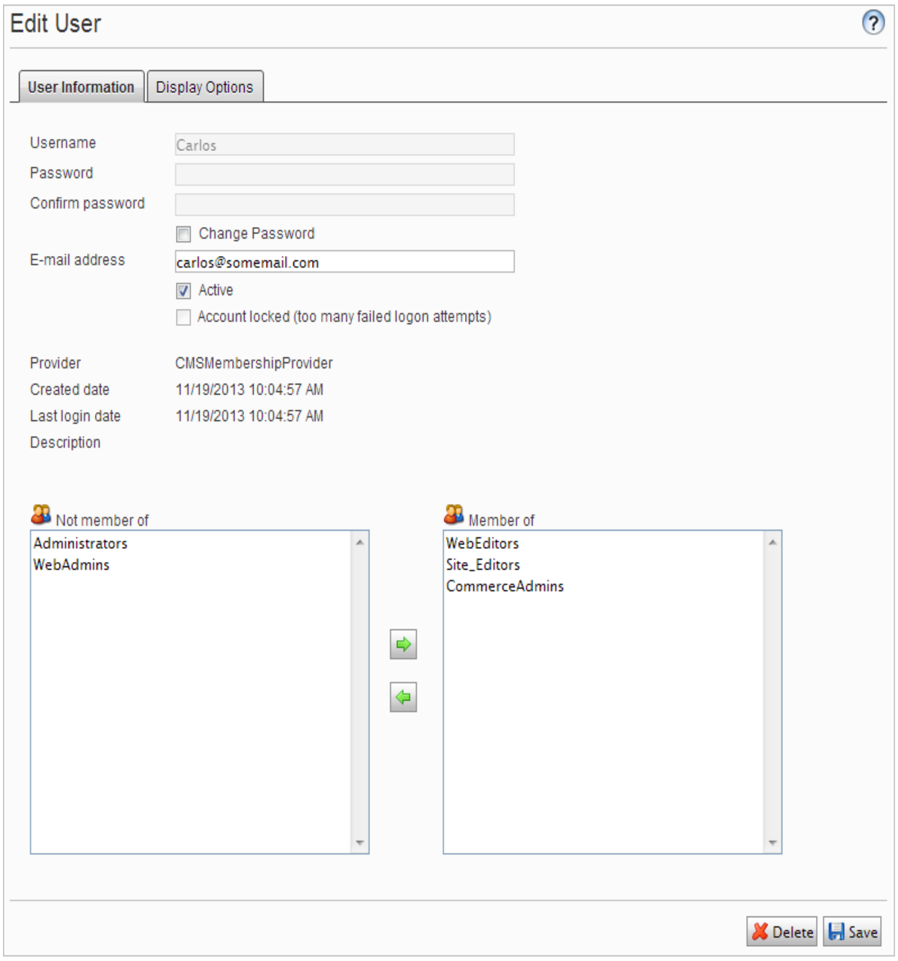
3. Select a role, for instance **Admins** in the list and add this to the **Security Role** field (the Admins role provides access to **all parts** of Commerce Manager, see below if you want to restrict the access). Click **Save**.



4. In the **Admin** view of **CMS**, go to **Search User/Group** and locate the user you created in the previous step. Click on the user name to edit the settings.



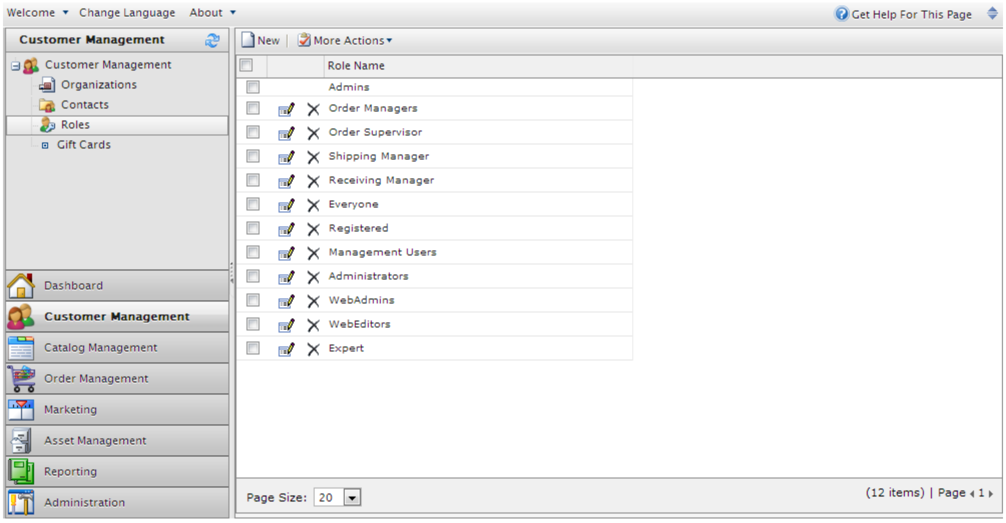
5. Make the user a member of the **CommerceAdmins** and the **WebEditors** groups. In addition to this, you need to make the user a member of one or more "structure" groups, for the user to be able to edit in the CMS page tree. In this example "Site_Editors" is a custom created group providing editing access for the entire website. Click **Save**.



6. Log in with the user to verify that the proper access rights are applied.

Restricting user access in Commerce Manager

A standard installation of the sample site has a set of predefined roles, which you can use to restrict access to various parts of Commerce Manager. These roles are based on common e-commerce working procedures and provides a suggestion to how you can work with the system. A user will need at least one of these roles assigned, in order to access Commerce Manager.



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 Commerce Manager.
- **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 **editorial** 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.

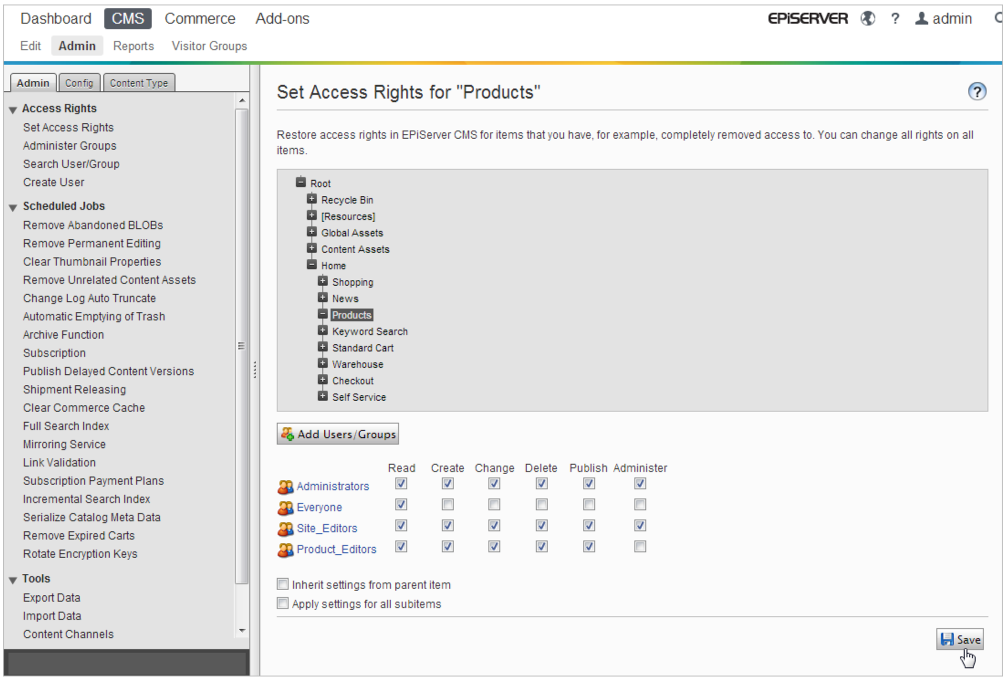
You can change the detailed permissions for each of these roles, as well as define your own roles and set permissions, all in order to match the specific working procedures in your organization.

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.

Restricting user access in CMS

The **WebEditors** group only provides access to the editing **view**. Users editing content in CMS and Commerce must also be granted editing access in the page tree. This can be done using "structure" groups. You can for instance create a group "Site_Editors" with editing permission in the entire page tree structure, and groups such as "Product_Editors" or "News_Editors" limiting editing access to selected parts of the page tree. Define access rights for the groups in the page tree, and then add users to the groups as appropriate.



Refer to the EPiServer CMS *user guide* for more detailed information on how to work with access rights.

Globalization

Many large e-commerce websites are "globalized", meaning that they have content in more than one language. With globalization in EPiServer we mean the possibility to create and display website content in different languages, as well as the possibility to make the user interface appear in multiple languages. In Commerce, specific language settings are also used for catalogs, payments and shipping methods as well as tax definitions.

How it works

Languages for catalog entry content such as product (SKU) descriptions, are set on catalog level. This means that when you configure a language for a catalog, you will get the possibility to define catalog entry descriptions in this specific language. When enabling a language, the language specific fields will appear ready for translation in edit view.

How does EPiServer know which language to display to website visitors? EPiServer enforces the language to be visible in the URL, either in the path or the domain part of the URL. When a website visitor selects a language option (if available), content existing in that language will be displayed. Alternatively, the preferred content display language may be detected by the browser used by the visitor. If content does not exist in a selected language, a fallback procedure may be applied.

To work with multiple languages in EPiServer Commerce, the languages must be enabled in both CMS and Commerce. These steps are described below. Refer to *Translating content* for more information on how to create multilingual content.

> When a language has been enabled for a Commerce catalog, all catalog entries will be immediately available in that language when viewed on the site. This means that for instance product descriptions that have not yet been translated, will appear empty if they are displayed on the front-end site.

Enabling languages

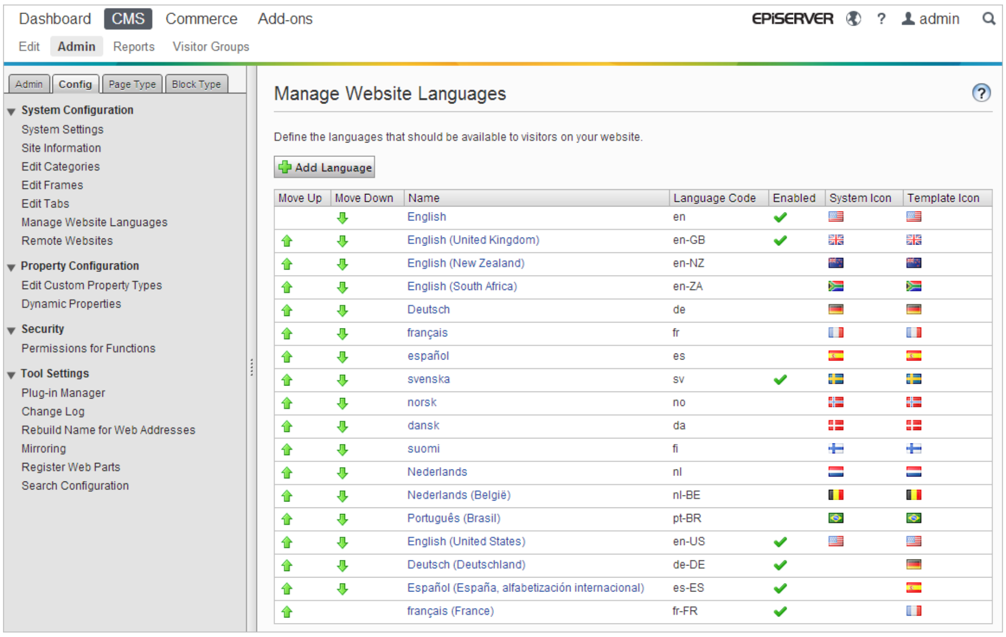
Usually a website will have a default or "master" language for content set up at the time of installation. In addition to this, you may add multiple content languages as required for your website. The enabling of languages is done in the steps described below. **Note** that you need administrative access right to access the administration interface in EPiServer CMS.

1. Enabling a language on the website

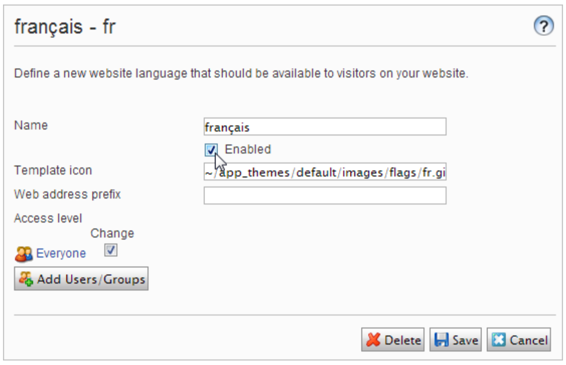
This step will activate the language to make it available for configuration in Commerce (step 2), and CMS (step 3).

1. In the **Admin** view in CMS, go to **Config** and **Manage Website Languages**.

2. Click on the desired language in the list (you can add a language if the desired one is not available in the list).



3. Select the **Enabled** check box and click **Save**.

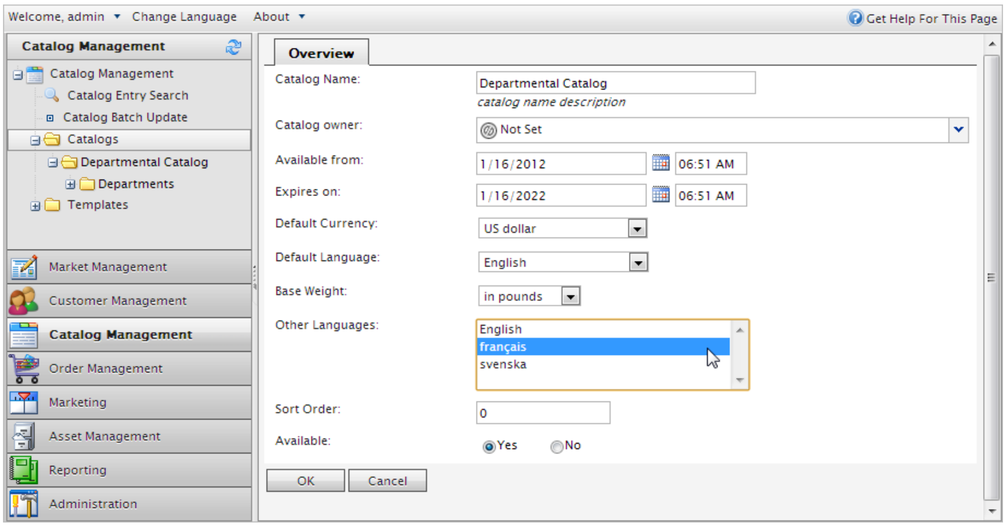


2. Enabling a language for a catalog in Commerce

This step will enable the language for a catalog in Commerce, making it possible to *translate product content* to this language.

1. In **Commerce Manager**, go to **Catalog Management** and select **Edit** for the catalog for which you want to enable the language.
2. Select the language(s) you want to add from the list in the **Other Languages** field (use the CTRL key to select multiple). You can leave the other settings as they are. **Note** that the default language will not be affected by the selections you make in the list.

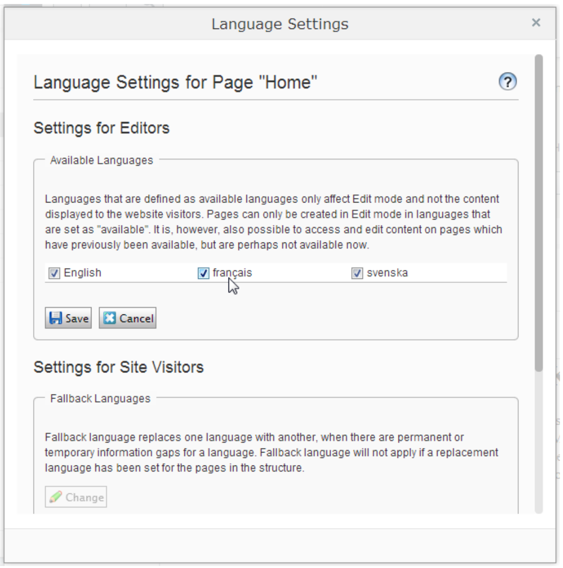
3. Click **OK**.



3. Enabling a language for editing in CMS

This step will make the language that you just enabled available for content creation by editors. By default, subpages will inherit language settings from their parent page.

1. In the CMS page tree, select the root page for the branch for which you want to enable the language. In this example we want "French" to be available for the entire site, so the language setting is defined on the start page.
2. Open the page in **All Properties** editing.
3. Select **Tools** and **Language Settings** in the header.
4. Select **Change** under **Settings for Editors**.
5. Select the language you wish to enable, click **Save** and close the dialog.



If you only want to translate selected parts of the website content, you can apply a fallback procedure for untranslated content. Refer to the *user guide for EPiServer CMS* for more information on language management.

User interface languages

The **user interface** languages of CMS and Commerce can be changed, making it possible for EPiServer users to work in their preferred language.

- To set the user interface language for Commerce, select **Change Language** in the upper menu of Commerce Manager. Chose the language of your choice in the list and click **OK** to save you changes.
- To set the user interface language for the Catalogs and CMS parts, 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**.

See also

- Refer to *Translating content* for more information on how to create catalog content in different languages.
- Refer to *Configuring common settings* for more information on language configuration in Commerce.
- Refer to *Globalization in the EPiServer CMS user guide* for more information on multilingual management.

Translating content

This section describes how to translate content in EPiServer Commerce. "Content" can be for example product-related content for catalog entries, or pages or blocks in CMS. When a language is enabled in EPiServer, the various content properties, for example product descriptions, will be available for translation.

Before you can translate content, the desired target languages for translation must be made available on the website. Refer to *Globalization* for more information on how to do this.

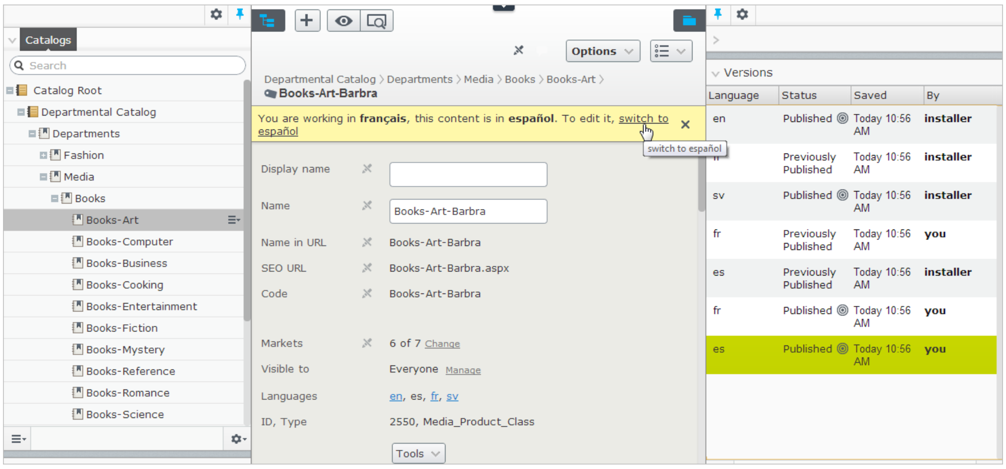
When translating content, have the original content open in another browser window for comparison. You can also copy and paste the original content into the text area where you are working, as reference.

Switching and viewing languages

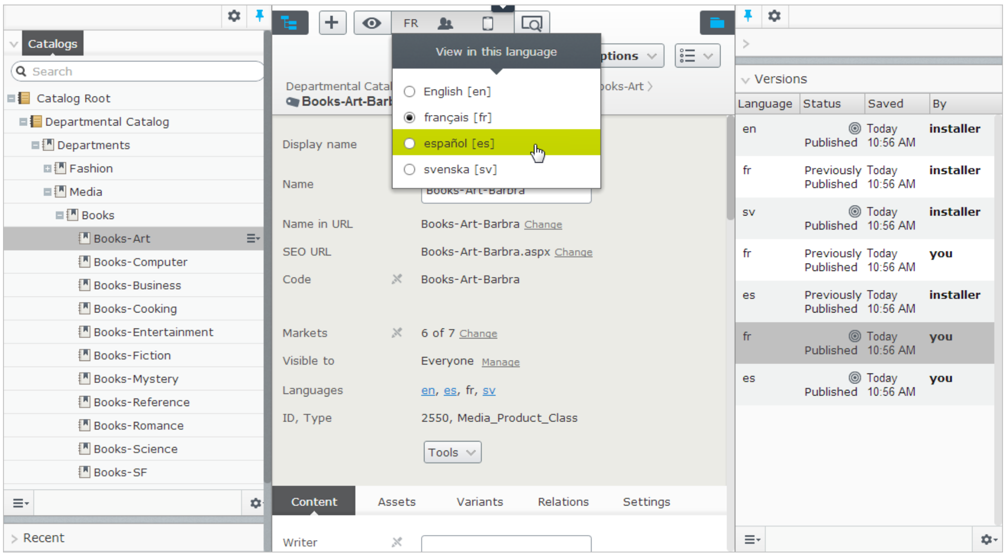
When working with translations, you may want to switch between editing in CMS and Commerce, for example if you are working with product descriptions and a campaign page at the same time. You may also want to see what a catalog entry or a page looks like in different languages. Or, you may want to see the language versions for an item.

- To switch language in **CMS**, go to the **Sites** tab in the navigation pane and select the desired language to work with. The user interface will reload displaying the page tree in the selected language. When going to Catalogs in Commerce, the catalog structure will now display in the same language.
- To switch language in **Commerce**, open a catalog entry for editing in the All Properties *view*, and select a language next to **Languages** in the header. The user interface will reload displaying the catalog structure in the selected language. If you switch to CMS now, the same language will be active here.

- When translating a catalog entry, you can use the *versions gadget* in the Assets pane to see the different language versions for the entry. By selecting a language in the version list will you can also switch to editing in another language using the switch option in the notification bar.

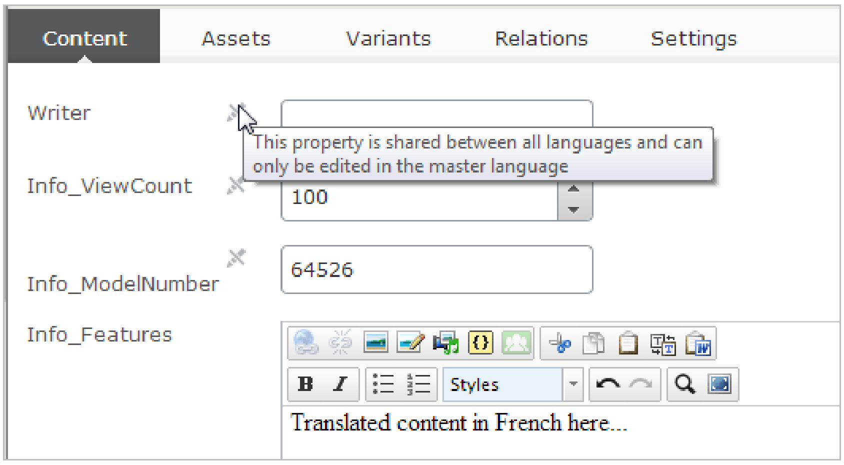


- Using the *preview* feature in the "eye" at the top, you can view and edit a catalog entry in one of the languages that are available for translation on the website.



Global properties

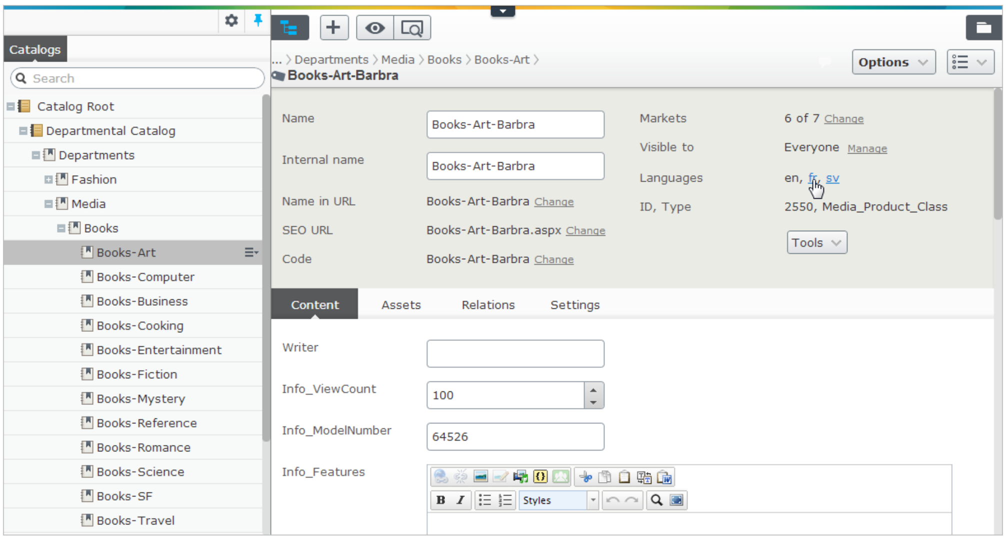
Depending on the type of catalog entry and your implementation, some properties such as sales code, may be "globally shared" and can only be edited in the "default master" language. These properties will be marked as **non-editable** when editing the content in another language. Switch to the master language if you need to edit these. The master language is usually the first language listed next to **Languages** in the header.



Translating content for catalog entries

Follow the steps below to translate content for a catalog entry (category, product, variant/SKU, package or bundle. In this example we will translate content for a product.

1. In the **Catalog** view, select the desired catalog entry to translate in the catalog tree.
2. Select **Edit** in the context menu for the selected entry, or click on the entry to open the **All Properties** editing.
3. In the header next to **Languages**, select the desired language to translate to (enabled languages will be listed).



4. Edit the content as desired in the properties available for editing, and follow the content publishing flow to *save and publish* the translated catalog entry information.

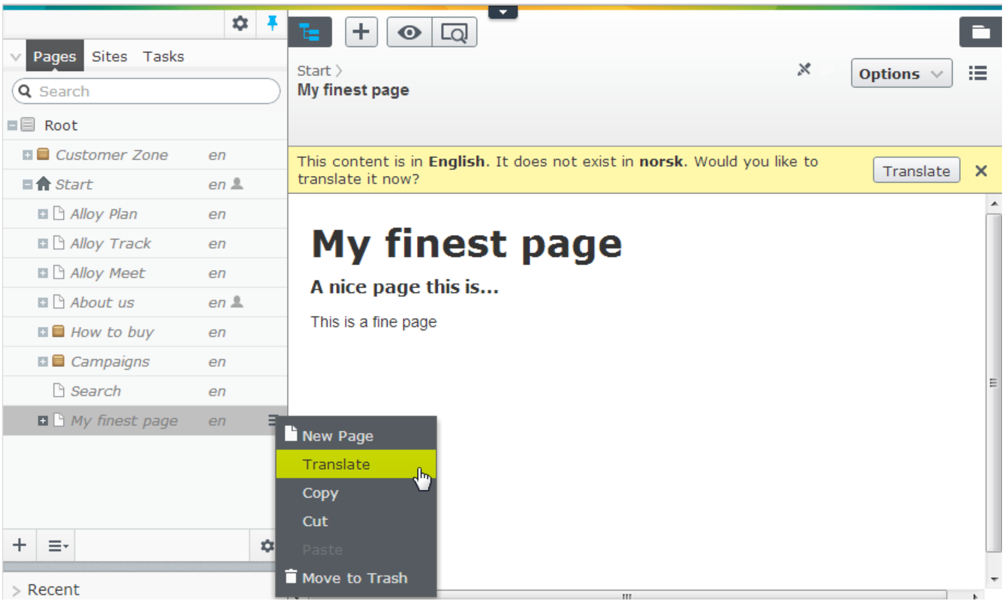
Translating content in pages and blocks

Below is a short summary of the steps to translate CMS content such as *pages* and *blocks*. Refer to the *CMS user guide* for a more detailed description of how to work with globalized content.

Translating a page

Do the following to translate a page:

1. Under the **Sites** tab in the left pane, select the desired target language for translation. The interface will reload and you will be taken to the **Pages** tab.
2. In the page tree, select the desired page to translate, and then click **Translate** in the notification bar at the top. Or, select **Translate** in the context menu for the page in the page tree.

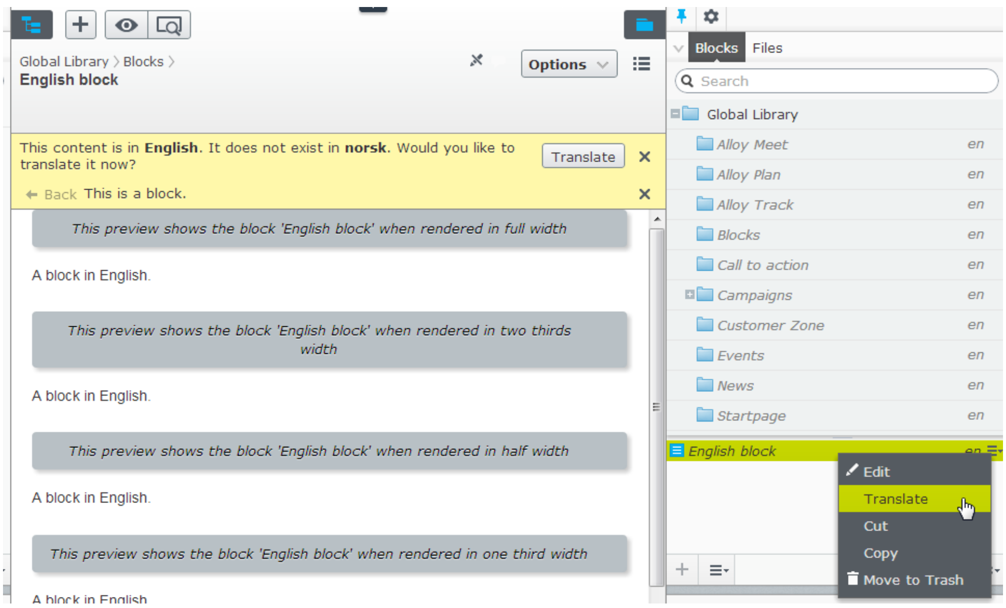


3. Edit the content as desired and follow the normal content publishing flow to *save and publish* the translated page.

Translating a block

Do the following to translate a block:

1. Under the **Sites** tab in the left pane, select the desired target language for translation, and the interface will reload.
2. Expand **Assets** and select **Blocks** in the right pane.
3. In the block structure, select the desired block to translate, and then the **Translate** option in the context menu.



4. Edit the content as desired and follow the normal content publishing flow to *save and publish* the translated block.

See also

Refer to *Globalization* for information on how to enable languages in EPiServer Commerce.

Search

The EPiServer platform has sophisticated search functionality which allows you to search through different types of content on a website. You can search for content pages and blocks, files, community objects and products. The search results will automatically be filtered based on access rights so that users will only see content they have access to.

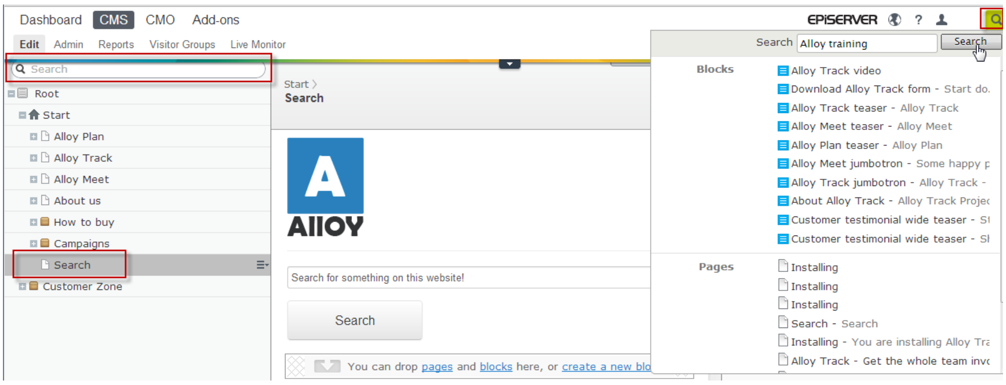
The search service in EPiServer is based on the open source search engine Lucene. The service is pluggable which means that Lucene can be replaced by another search provider. The search functionality can be extended using EPiServer Find to build more advanced features such as filtering and faceted navigation.

The underlying search functionality is used by the different EPiServer products, and the description here applies to EPiServer products with their respective sample sites with templates.

Search options

Depending on how your installation is set up and from where you are searching, there are different options:

- When editing, the **global search** is available in the upper right part of global menu. Depending on the configured search providers, this option can search all types of content on the website.
- When editing, the search option is available at the top of the left and right hand **panes**. This option will search for content in the components of the panes, for instance **pages** in the page tree, **blocks** or **media** files, or **products** if you are working with EPiServer Commerce content.
- Visitors to the site will usually access search through a **search page** with a search field, like on the EPiServer sample sites. The search field is usually available in the top menu on the front-end of the website.



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.

Configuring search

The search feature has some administration and configuration options which are managed from the **administrative interface** in EPiServer CMS.

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.

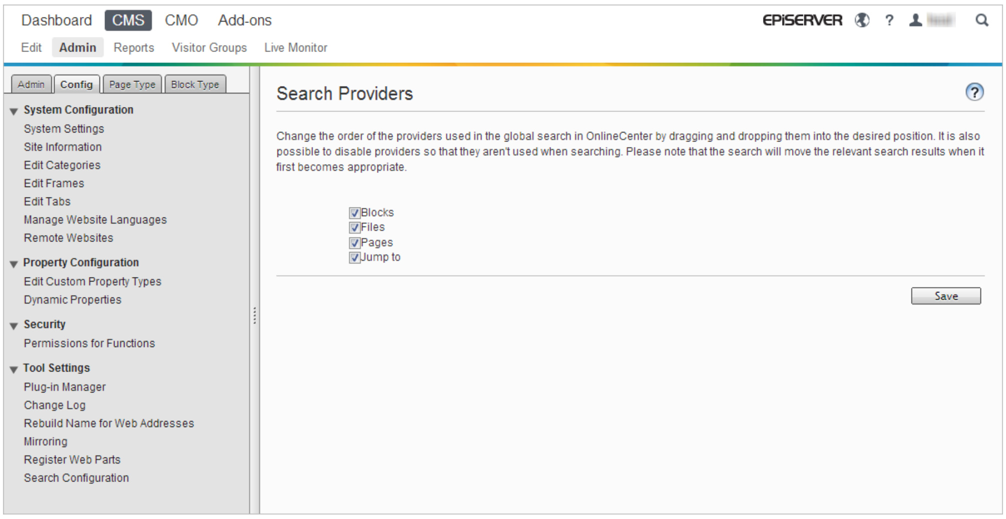
Search configuration

It is possible to configure different **search providers** for the modules in your website implementation. A search provider can search for instance pages, blocks, files, categories, forums or page types, or products in a commerce installation. The EPiServer CMS sample site comes with search providers for pages, blocks and files. Refer to the EPiServer Framework SDK for more information on how to configure additional search providers.

You can decide which search providers you want to enable, and the order in which they will appear in the search hit list. To access these settings, switch to the admin mode and select **Search Configuration** under the **Config** tab. The following options are available for a standard installation:

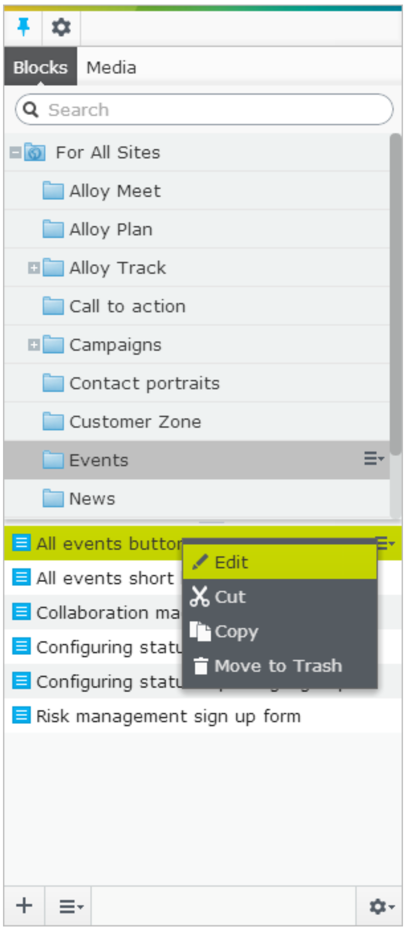
- **Blocks**. Selecting this option will allow for search in blocks on the website.
- **Files**. Selecting this option will allow for search in files on the website.
- **Pages**. Selecting this option will allow for search in pages on the website.
- **Jump to**. Selecting this option will make it possible to jump from the search hit list directly to **menu alternatives** matching your search criteria.

You can drag and drop the search provider options to change the order between them. This will control the order in which the results will be displayed in the hit list. Clearing a check box will disable this search provider option. Select **Save** to save your changes.


Dashboard
CMS
CMO
Add-ons
EPiSERVER
Edit
Admin
Reports
Visitor Groups
Live Monitor
Admin
Config
Page Type
Block Type
System Configuration
System Settings
Site Information
Edit Categories
Edit Frames
Edit Tabs
Manage Website Languages
Remote Websites
Property Configuration
Edit Custom Property Types
Dynamic Properties
Security
Permissions for Functions
Tool Settings
Plug-in Manager
Change Log
Rebuild Name for Web Addresses
Mirroring
Register Web Parts
Search Configuration
Search Providers
Change the order of the providers used in the global search in OnlineCenter by dragging and dropping them into the desired position. It is also possible to disable providers so that they aren't used when searching. Please note that the search will move the relevant search results when it first becomes appropriate.
Blocks
Files
Pages
Jump to
Save

Assets

Assets are available from the assets pane in EPiServer, and can be content of the type *media files*, for instance images or documents, *blocks*, or products from the catalogs in EPiServer Commerce. Assets are available both in EPiServer CMS and EPiServer Commerce, making it easy to add content by dragging and dropping items into for instance a content area in a page, a block or a product.

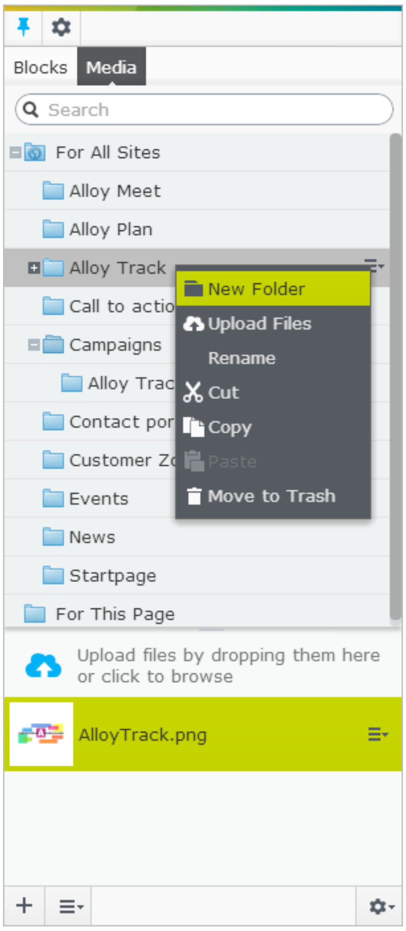


Note By default the assets pane in a standard EPiServer installation will contain **Media**, **Blocks** and **Catalog entries** for EPiServer CMS and EPiServer Commerce. Since the assets pane is a plug-in area there might be other assets available in your installation.

You can work directly with content from the assets pane, for instance edit images or blocks, or create folders to organize content items. The context menu will provide different options depending on the type of assets selected. In the following we will describe how to work with content items in the assets pane.

Media

Media in EPiServer are files that can be for instance an image, a document such as a pdf document or a Word document, a video or mp3 files. Media is managed from the media library on the **Media** tab in the assets pane. Here you can *create folders* and upload media files. You can then make use of your media by dragging them into an EPiServer CMS page or a block, or associate them with a product in EPiServer Commerce.



Searching and browsing for media files

Use the search box at the top of the pane to *enter search criteria* and retrieve media files. Clicking a search result will expand the folder where the file is located. To browse for media files, click a folder to expand the folders and content beneath it.

Uploading a media file

Media files are most easily uploaded through drag-and-drop operations from a file location on your computer, to the upload area. You can also click directly in the upload area to add files. Or, you can select **Upload Files** in the context menu for the target folder you want to upload the files to.

Upload media files through drag and drop as follows:

1. Click the media folder to which you want to upload media files.
2. On your computer, browse and select one or several files that you want to upload (hold down Ctrl or Cmd for multiple selection), and drag them into the upload area. An upload status window will be displayed.
3. When you are done, click **Close**.

Previewing media

Media files in list views are represented by thumbnail images. Common image file formats are rendered for preview by default on the EPiServer CMS sample site, but your partner developer can build rendering for other file formats.

Depending on the type of media file, you will get the following preview options on double-click:

- An image or video will open preview
- Other media files will open all properties editing view

No matter what kind of file type, you can download the previewed file by selecting **Options** > **Download this file**.

Downloading a media file

To download a media file, select it in the tree structure and then **Download** in the context menu. Or, if you open the image or video for preview, select the download option from the **Options** combo button on the toolbar.

Adding an image to content

Insert one or several images by dragging and dropping them directly into a page as follows:

1. Edit the page, and select the **Media** tab.
2. Select the image you want and drag it where you want it on the page.

> ***Tip*** For accessibility reasons (for example, people who are visually impaired) it is important to describe the image in words by typing a text in the **Image description** box.

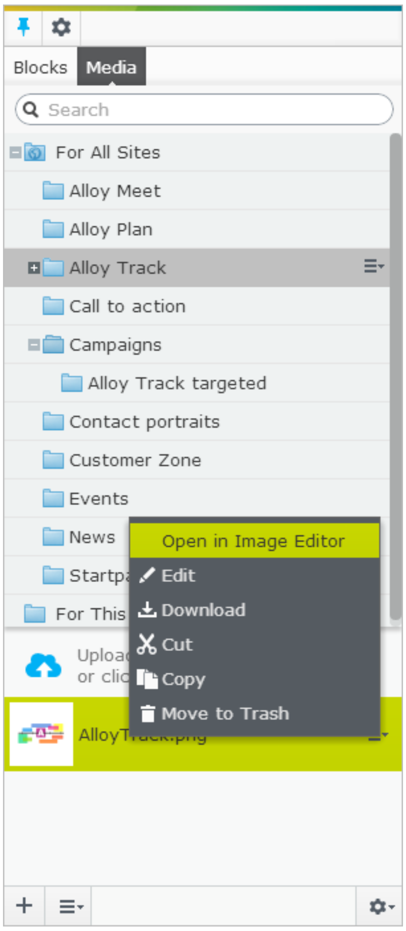
Editing an image

The **Image Editor** in EPiServer provides basic image editing features such as cropping, resizing and transforming. The edited image file can either be saved as a copy, or replace the original file.

You can access the image editor in the following ways:

- From the **Media** tab in the assets pane.
- From the rich-text editor. Here you can also edit the image properties, for example, apply a CSS class to the image.

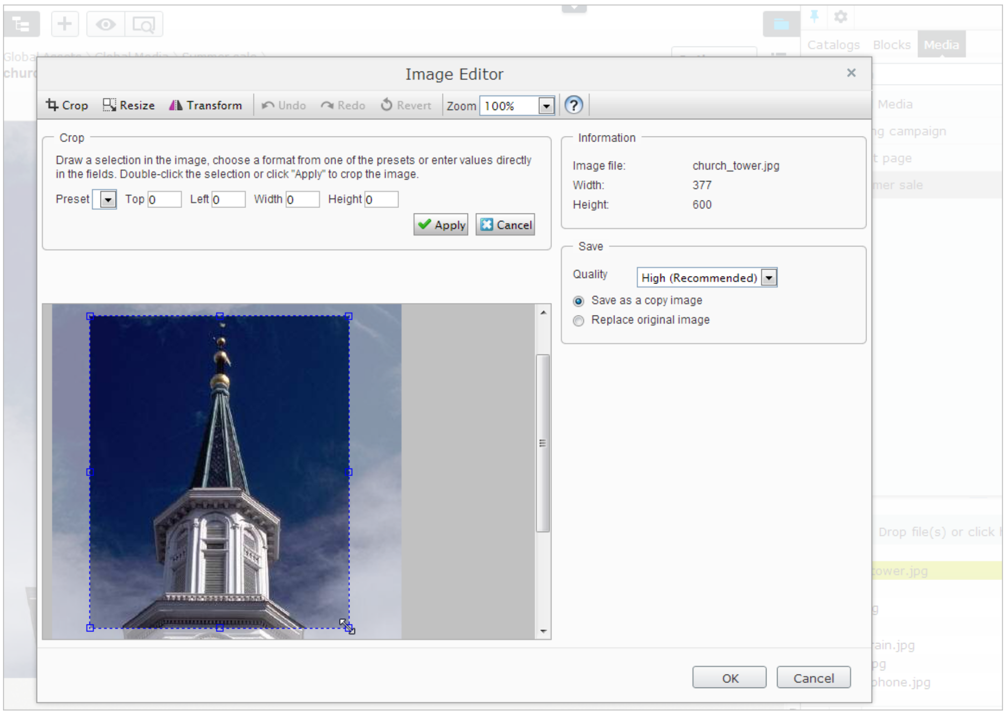
> ***Tip*** You should always try to have as small file size for images as possible on web content to avoid long downloading times. Therefore compress the image to a smaller file size by cropping or resizing it. Web pages often have a limit for how wide the images can be (usually around 500–600 pixels), check this with your system administrator. For cropping and resizing images it is also possible to select predefined sizes from the **Preset** list, defined by the system administrator in the **web.config** file of your website.



Edit an image as follows:

1. Select the image in the tree structure and then **Open in Image Editor** from the context menu.
2. In **Image Editor**, crop, resize and transform the image as follows:
   - **Crop**. Select the area to crop the image either by entering values in the **Top**, **Left**, **Width** and **Height** boxes or by drawing a selection in the image. You can also use presets if any are configured by the system administrator.
   - **Resize**. Change the image size by either moving a corner handle or entering a value in the **Width** and **Height** boxes. Keep **Constrain proportions** selected to retain the image’s proportions. You can also use presets if any are configured by the system administrator.
   - **Transform**. Flip or rotate the image, or select **Grayscale** if you want to convert to grayscale.

3. When cropping or resizing, remember to click **Apply** to save the changes before proceeding.



4. Select any of the following saving options:
   - **Save as a copy**. Select to save the image as a copy of the original image. Name for the image file copy and click **OK**. Note the following:
     - If you have selected the image from the tree structure in the media library for editing, the copy will be saved in the same folder as the original file.
     - If you have selected the image on a page for editing, the copy will be saved in a local folder for that page.
   - **Replace original image**. Select to replace the original image on the web server with the edited image. Confirm by clicking **OK**. Note that this action will affect all places on the website where the image is used.
5. When you are done, click **OK**.

Removing an image from content

To remove an image from the content, select it in the rich-text editor and press Delete or Cmd+Delete. Note that the image disappears from the content, but is not deleted from the media library shown on the **Media** tab.

Editing metadata for media files

The metadata fields available depends on the implementation. For images it can be for instance photographer, description and copyright information.

To edit metadata, select the media file in the tree structure and then *all properties editing view*.

Renaming a media file in the library

To rename a media file, select the media file in the tree structure and then *all properties editing view*. Change the **Name** and the **Name in URL**. Renaming a file will not cause any links to be broken on your website.

> ***Caution*** Renaming a folder or media file will change its URL on your website, which might cause broken incoming links from other websites or indexing from search engines.

Replacing a media file in the library

To replace an existing media file with another, upload the new file with the exact same name and in the same folder as the file you want to replace. See the section about upload through drag and drop. Confirm the action by selecting **Replace File** (**Replace Files**), or cancel the action by selecting **Skip this File** (**Skip these Files**). Media files that are replaced will be published immediately, and this action affects all places on the website where these files are used.

> ***Note*** In some cases when replacing original images, the changes will not be immediately visible due to website caching. You may need to refresh the page to make the changes appear.

Moving, copying and removing a media file from the library

Moving, copying and removing a media file works in a similar way as for pages by using the context menu.

Moving a media file will not affect the content where it is used, but it may cause that it will be hidden for users that have no access rights.

Since blocks and media files share the same folders, removing a folder from the tree structure will affect all content within the folder. You will be notified about existing references to the content where it is used so that you can remove these links before moving the file to trash.

Note that the file will no longer be published on your website once it has been moved to trash. You can see the content you have removed by selecting **View Trash** from the context menu of the media gadget.

> ***Caution*** Moving and removing a media file will change its URL on your website, which might cause broken incoming links from other websites or indexing from search engines.

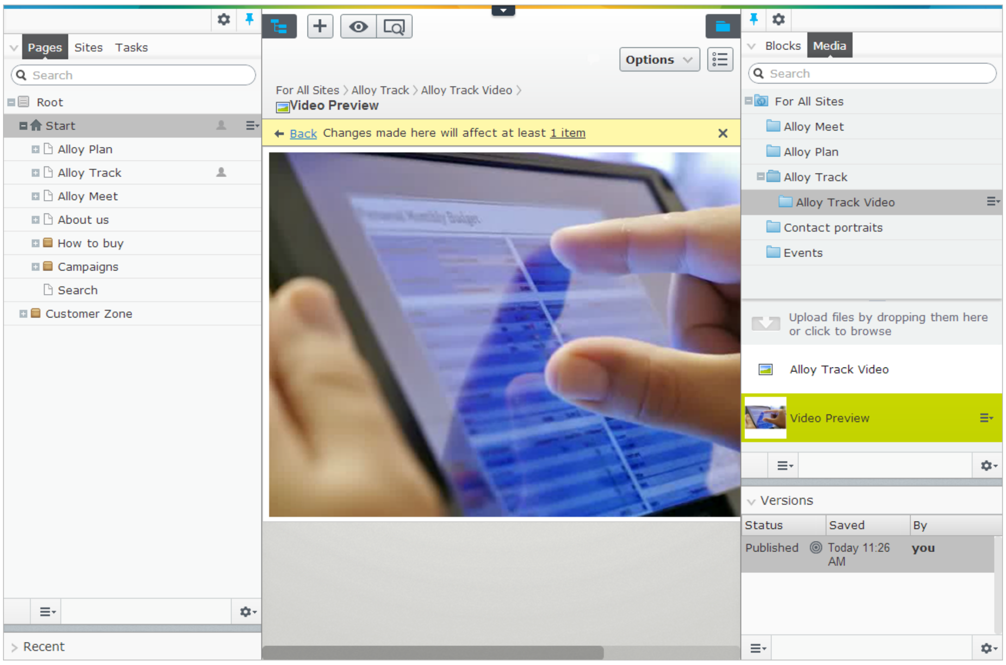
Managing media files in several languages

You cannot create language versions for media files or their folders, but you can name them, for example, with a language code. The folder structure for blocks and media will look the same no matter which language you select under the **Sites** tab in the navigation pane. Refer to the section about globalizing content in the EPiServer CMS documentation.

Managing media file versions

Versions for media files are managed in the same way as for other types of content, using the *Versions gadget*. When you edit an image or update the metadata for the image, a new version will be created, which will be listed in the versions gadget. This allows you for instance to revert to and republish a previous version of image versions if needed.

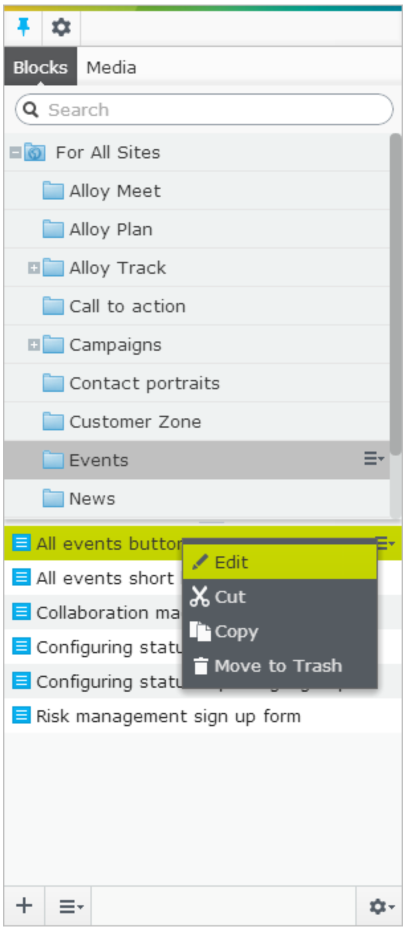
For version management of blocks, media and pages, see *Managing versions*.



Blocks

Blocks are pieces of content that can be reused and shared between websites, while being maintained in one place only. Typical types of content blocks are campaign teasers and banners, videos, news feeds and contact forms. Just like for pages, you can have different block types, for instance an editorial block, or a form or page listing block.

Blocks are managed from the **Blocks** tab under the assets pane, where you can create new blocks and organize them in folders. You can then utilize blocks by dragging them into content areas of for instance EPiServer CMS pages. You can manage block versions as for other types of content, and blocks can also be personalized to display selected visitor groups.



Searching and browsing for blocks

Use the search box at the top of the pane to *enter search criteria* and retrieve blocks. Clicking a search result will expand the folder where the block is located. To browse for blocks, click a folder to expand the folders and content beneath it.

Creating a block

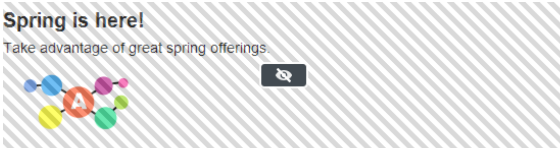
> ***Note*** To be able to create blocks, editors must have **Create** access rights on the **root** directory of the website.

Creating a block from the Blocks tab in the assets pane

When using this option the block will be saved in the folder of your choice in the block folder structure. The block will be globally available on the website.

1. Select the folder in the structure under which you want the block to be created, and select **New Block** in the context menu, or click the **Add** button.
2. Select the block type among those that are available on your website, and provide a name for the block.
3. Depending on the type of block, add content as appropriate.
4. Follow the publishing flow and publish the block immediately or schedule for publishing later. Unpublished blocks will not be visible to visitors, and will appear dimmed out in edit view when

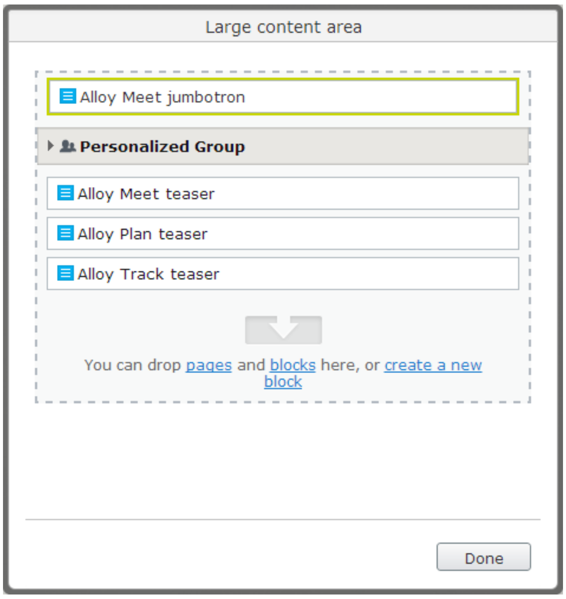
added to a content area.



When creating a block, clicking **Back** will take you back to the page or block you were previously working on.

Creating a block directly from a content area

When using this option the block will be saved in the **For this page** folder for the selected page.



1. Click **Create a new block** in the content area, either from the ***on-page*** or the ***all properties*** editing view.
2. Select the block type among those that are available on your website. The block will get a system-generated name.
3. Depending on the type of block, add content as appropriate.
4. Follow the publishing flow and publish the block immediately or schedule for publishing later.

About how to add links to the link collection content area or the rich-text editor, see *Creating links*.

Editing a block

> ***Note*** Changes made to a block that is being used in content on the website, will affect all instances where the block is used.

You can edit blocks either directly from the **content area** where it is being used, or from the **Blocks** tab in the assets pane.

1. Select the desired block to edit, and select **Edit** in the context menu.
2. Depending on the type of block, change the content as appropriate.
   If you want to rename the block, use ***all properties editing view***.

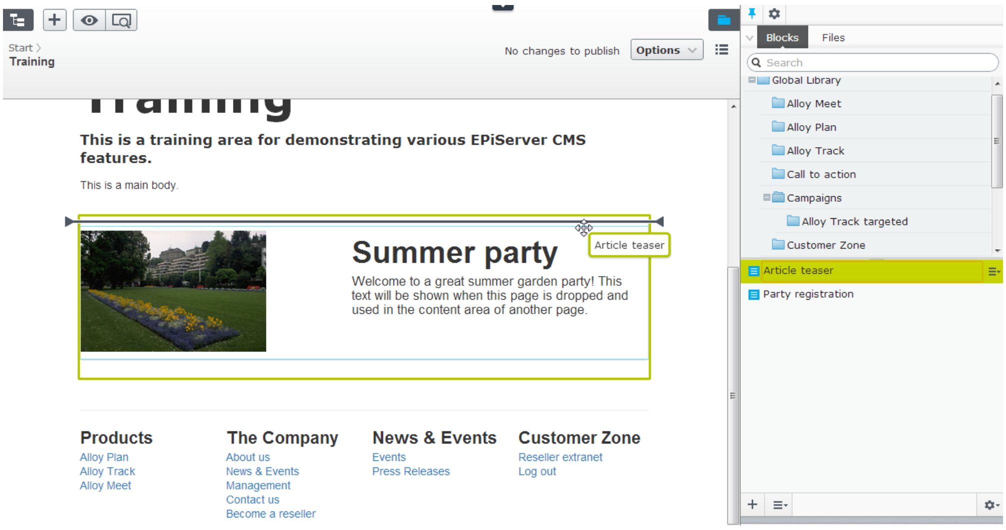
3. Follow the publishing flow and either publish the block immediately or schedule for the changes to be published later.

When editing a block, clicking **Back** will take you back to the page or block you were previously working on.

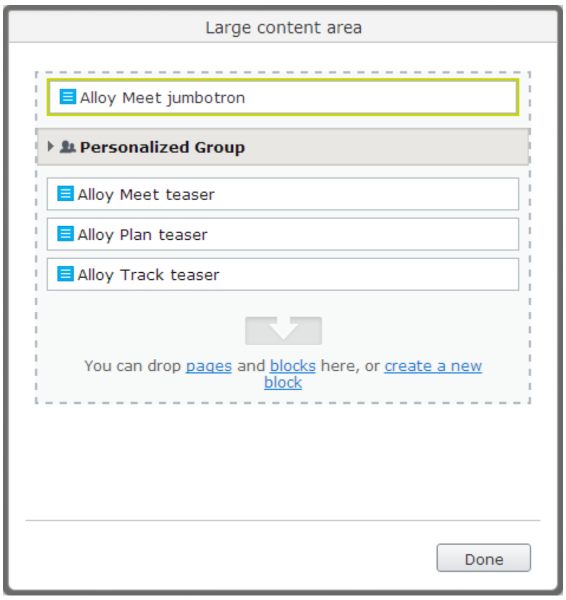
About how to add links to the link collection content area or the rich-text editor, see *Creating links*.

Using blocks

Blocks can only be added to content areas that support blocks. In edit view, select the desired block in the assets pane, and drag it into a ***content area*** of a page. A green frame will indicate where it is possible to add blocks in the content.

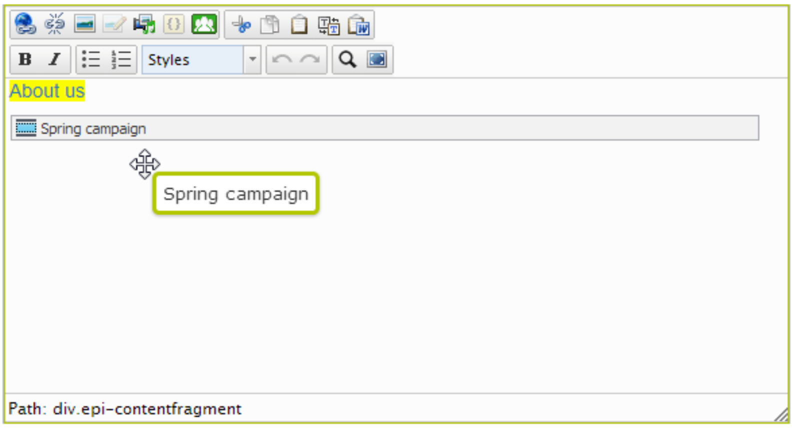


You can add several blocks to the same area. Drag the block above or beneath an existing block, and drop it when the separator appears. Blocks can also be added to a content area from the ***all properties editing view***.



Tip Like blocks, **pages** from the page tree can also be dropped into a content area. Depending on how the page template is built, the content of the selected page will be rendered in the content area. This is useful when you want to promote a specific page.

Blocks can also be added to a ***rich-text editor area*** through drag and drop.



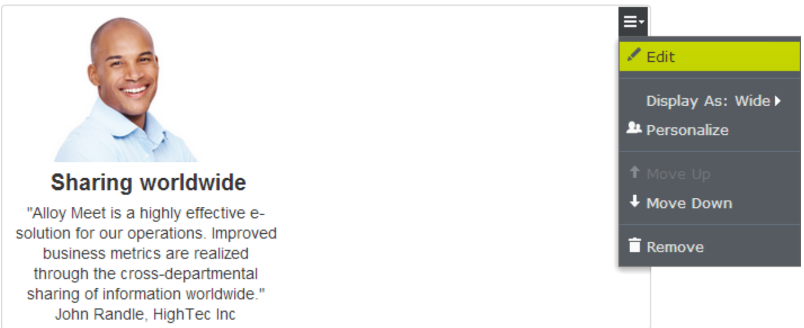
To **remove** a block from a content area, select **Remove** from the context menu.

Tip Blocks can be **personalized** to display targeted information to selected visitor groups, see *Personalizing content*.

Note You cannot link to blocks since they do not have a web address (URL). However, you can create links to other pages and media files if the block contains the rich-text editor (XHTML string property).

Arranging blocks in a content area

You can change the display order of blocks by **rearranging** them in the content area, either through drag-and-drop, or by selecting **Move up** or **Move down** in the context menu.



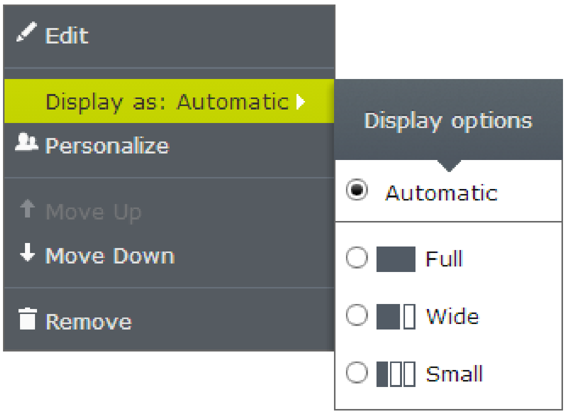
Displaying blocks in different styles

You can select display options for blocks on a page in different sizes and styles. The rendering of blocks needs to have built-in support for managing different widths, in order for the content to be properly displayed.

The following options are available:

- **Automatic**. Select this option to display the block using an appropriate built-in style option selected by the system.

- **Manually**. Select this option to display the block using the specific style option, for instance pre-sets such as “Full”, “Wide” or “Small”, for the specific context where the block is used.



Renaming a block

To rename a block, select the block in the tree structure and then in the ***all properties editing view*** change the **Name** property. Renaming a block will not cause any links to be broken on your website.

Moving, copying and removing blocks in folders

Moving, copying and removing a media file works in a similar way as for pages by using the context menu.

Since blocks and media files share the same folders, removing a folder from the tree structure will affect all content within the folder. You will be notified about existing references to the content where it is used so that you can remove these links before moving the block to trash.

Note that the block will no longer be available on your website once it has been moved to trash. You can see the blocks you have removed by selecting **View Trash** from the context menu of the block gadget.

Managing block content in multiple languages

You can see a list of versions for pages or blocks and manage them from the **Versions** gadget, where you also can manage language versions.

Managing block versions

Versions for blocks are managed in the same way as for other types of content, using the *Versions gadget*. When you edit an image or update the properties for a block, a new version will be created, which will be listed in the version gadget. This allows you for instance to revert to and republish a previous version of block versions if needed.

For version management of blocks, media and pages, see *Managing versions*.

Setting access rights for blocks

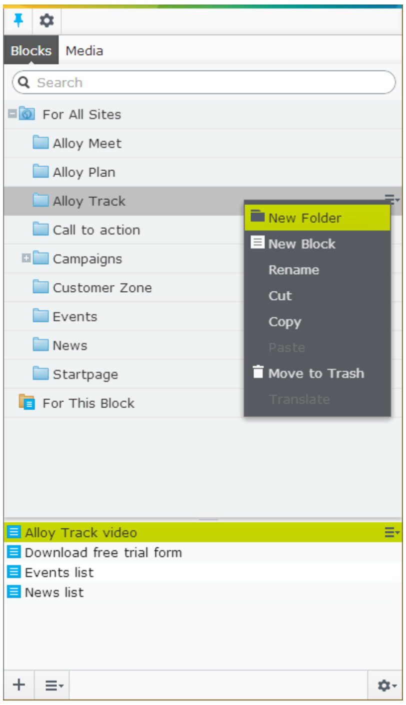
Just as for other types of content such as pages, it is possible to define access rights for specific blocks. This is done either directly for the block in ***all properties editing view***, or for the entire block structure from the admin view in EPiServer CMS.

> ***Note*** To be able to create blocks, editors must have **Create** access rights on the **root** directory of the website.

Folders

Folders are used for organizing content such as *media files*, for instance images, videos and documents, as well as *blocks*. You can have folders with content that can be shared between all sites in a multi-site scenario, or you can have folders with content that will only be available for that specific site. There are also local folders, and content stored in these will only be available from that specific content, for instance a page or a block.

Folders are available in the assets pane, where blocks and media files share the same folder structure.



In the EPiServer CMS sample site with templates you will have the following predefined folders:

- **For All Sites**. Content in this global folder can be used and shared between all sites in a multi-site installation.
- **For This Site**. Content in this folder is available for usage on a specific site only, in a multi-site installation. This can be defined when adding a new site, for instance a campaign site, from the EPiServer CMS admin view.
- **For This Page** or **For This Block**. Content in this local folder is available only for one specific page or block, and cannot be accessed from other pages or blocks. Useful for instance if you have images for a specific purpose and which must not be used elsewhere on the website.

Creating a folder

To create a folder, select the desired folder in the structure under which you want the new folder to be created, select **New Folder** in the context menu, and provide a name for the folder.

Moving, copying and removing a folder

Moving, copying and removing a media file works in a similar way as for pages by using the context menu. You can also move folders through drag and drop.

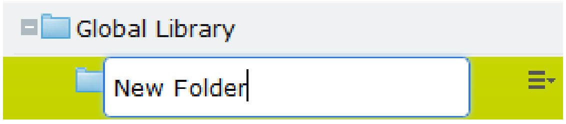
Since blocks and media files share the same folders, removing a folder from the tree structure will affect all content within the folder. You will be notified about existing references to the content where it is used so that you can remove these links before moving the folder to trash. You can see the content you have removed by selecting **View Trash** from the context menu of the **Blocks** or **Media** gadget.

You cannot remove local folders.

> ***Caution*** Moving and removing a folder will change the URL on your website, which might cause broken incoming links from other websites or indexing from search engines.

Renaming a folder

Select **Rename** in the context menu for the folder you want to rename, and enter a new name. Renaming a folder will not cause any links to content to be broken on your website.



Caution Renaming a folder or media file will change the URL of these assets on your website, which might cause broken incoming links from other websites or indexing from search engines.

Managing folders in several languages

You cannot create language versions for folders, but you can name them, for example, with a language code. The folder structure for blocks and media will look the same no matter which language you select under the **Sites** tab in the navigation pane. Refer to the section about globalizing content in the EPiServer CMS documentation.

Setting access rights for folders

By default the predefined global folder is available to everyone. Local folders will inherit the access rights from the content (page or block) to which they are associated. It is possible to define access rights for specific folders in a structure. Setting access rights for folders is done from the admin view in EPiServer, in the same way as for pages in the page tree structure.

Catalogs tab

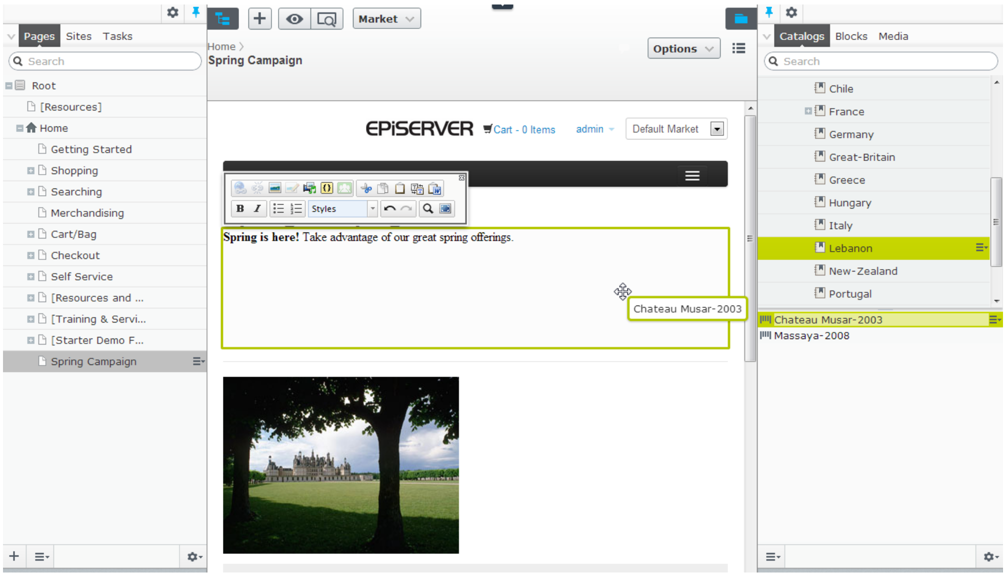
The **Catalogs** tab in the Assets pane makes it easy to create links and relations to catalog entries in the product catalog, as well as to add product information to CMS pages and blocks. Using this, catalog entries and their content are readily available for drag-and-drop usage in both Commerce and CMS.

Creating relations between products

Refer to the *Editing products and variants* section for more information on how to create relations between catalog entries using **Catalogs** in the **Assets** pane.

Adding products to pages or blocks in CMS

Access the **Catalogs** tab in the **Assets** pane to drag catalog entries into the *rich-text editor* or a content area of a *CMS page or block*, to display and promote selected product information, for instance in a campaign page.

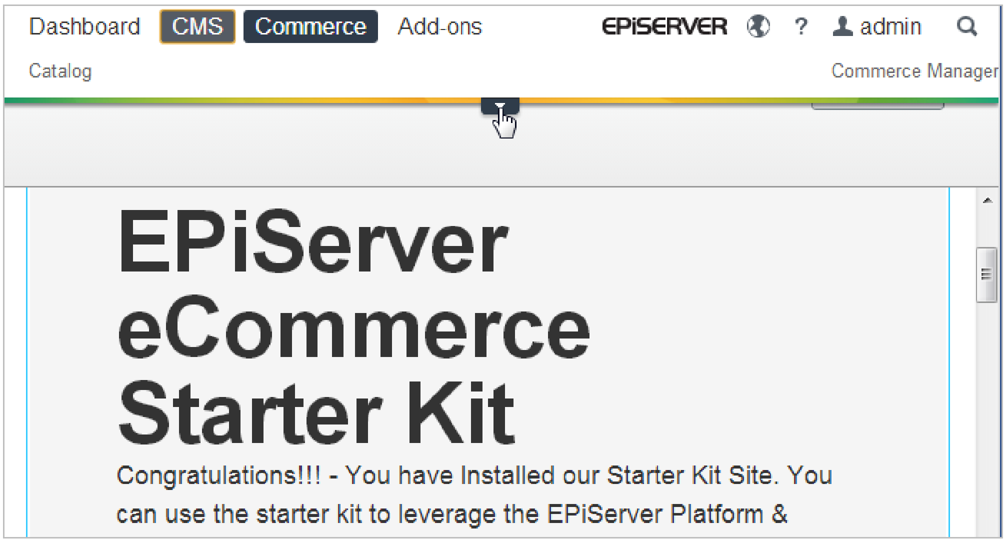


In order for product information to be properly displayed when used in other types of content, rendering templates must first be defined for this. Refer to EPiServer Commerce sample site for examples.

Sample site

The EPiServer Commerce sample site provides examples of how you can implement an e-commerce solution. The site contains a set of *content types* and templates for pages, blocks and products. The product content types allows for creating various types of catalog entries, such as product categories, and products and variants. The page templates make use of the built in functionality of the EPiServer platform, and illustrates the many possibilities when creating dynamic e-commerce websites based on EPiServer.

When installing the EPiServer Commerce package with a sample site, you will have a CMS part for working with editorial content, and a Commerce part for working with *catalogs* and e-commerce administration.



A sample catalog will be installed and can be administered under **Catalog** in the global menu. The rest of the e-commerce administration is done from the **Commerce Manager** part. For content display, a set of pages will be created and organized in a specific structure in the page tree under **Pages** in the CMS/Edit part.

Sample features

In the following sections some of the features included in the sample 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 a sample template project in your development environment, to explore the templates and their functionality.

Content types

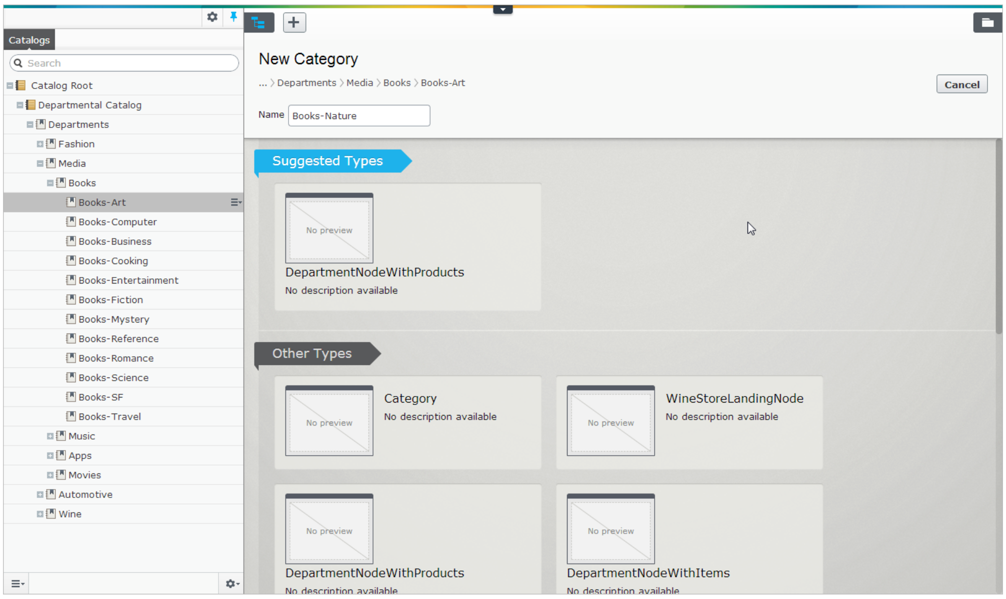
Content in EPiServer can be pages, blocks, media files and folders in CMS, or *catalog content* in Commerce. The content type defines a set of *properties* that an item contains. Content types are normally created through code, but they can also be added and modified using the administrative interface in CMS. The sample site is based on a set of model types for products, pages and blocks, and you can create customized content types based on these.

The sample site has a set of page types and templates for entering and rendering of content, and illustrating various e-commerce features. In EPiServer you can also work with *blocks*, which are smaller reusable content components that can be added to multiple pages. Like pages, blocks also have block types with associated rendering templates.

> The description here refers to a "standard installation" of an EPiServer Commerce sample site. CMS-specific functions are not described here, refer to the *EPiServer CMS user guide* for more information.

Catalog content

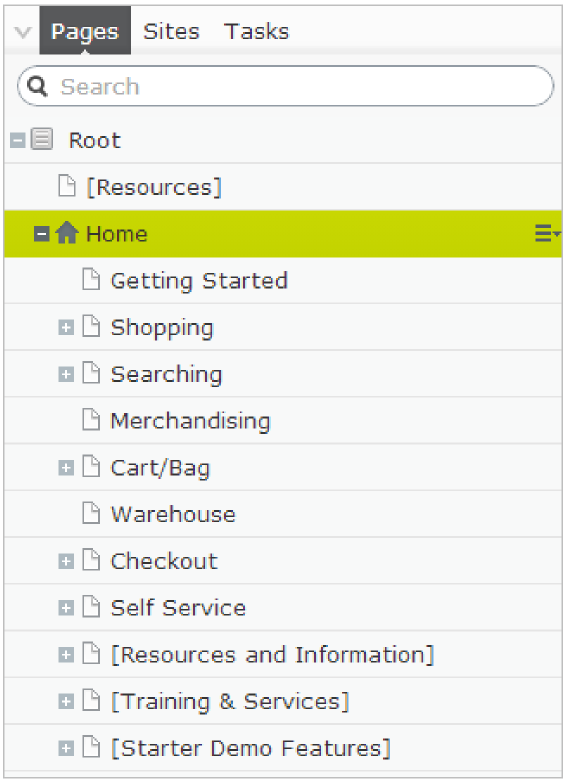
The sample site contains a set of content types related to catalog entries such as categories, products, variants, packages and bundles. You will see these when you *create a new catalog entry*, for instance a product category. You can also browse the catalog tree to see the structure of catalog entries, and the various content types that they are based on.



Depending on the type of catalog entry, the content type will contain different properties where you can enter content, for instance a product description or an image. Refer to *Editing and publishing catalog entries* for more information.

Site structure

On the sample website, pages are organized into a page tree structure which can be viewed under **Pages** in the left-hand pane in the *CMS Edit view*.



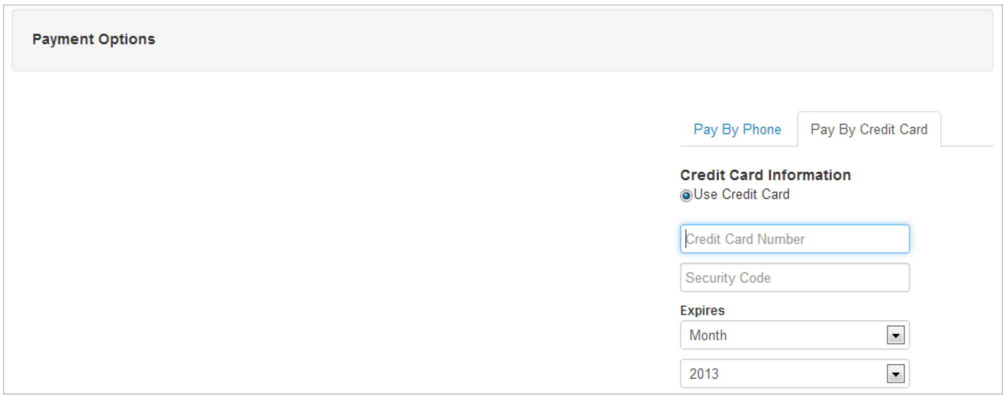
Available blocks on the site are displayed under **Blocks** in the right-hand Assets pane in the **CMS Edit view**.

Sample page types

The start page of the sample website is built using the **Home** page type, and much of the editorial content is built using the **Default** page type. In addition to this, there are specific page types for various e-commerce functionality such as accounts, orders and wishlists. There is also a specific page type for creating a *Search* page.

Payment providers

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.



Refer to the *Payments* section in this documentation for more information on how to set up payment methods for EPiServer Commerce. Additional payment provider solutions are also available from *EPiServer World*.

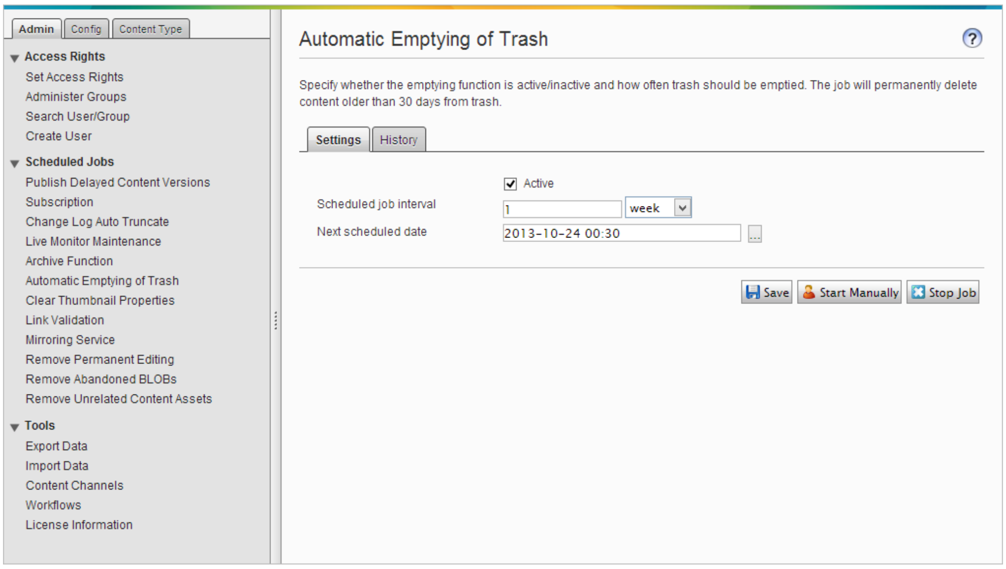
Scheduled jobs

A **scheduled job** is a service performing a specific task that can be executed repeatedly at a given time interval, or when an administrator starts the job manually. In a standard installation of the EPiServer platform with EPiServer CMS and EPiServer Commerce, there are a number of scheduled jobs available, of which some are enabled by default with preset values. You can also develop your own customized scheduled jobs for specific tasks on your websites.

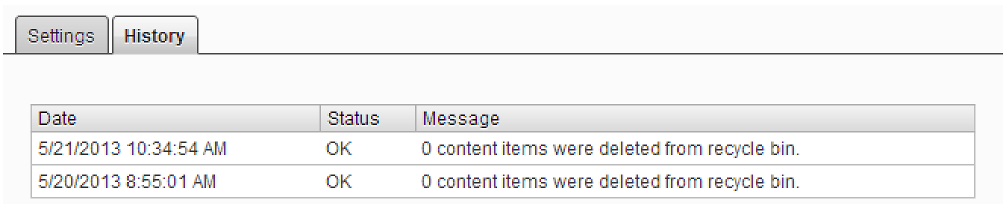
Administering scheduled jobs

Manage scheduled jobs as follows:

1. Log in as an administrator and navigate to the EPiServer CMS **Admin** view.
2. Select the desired scheduled job under the **Scheduled Jobs** section of the **Admin** tab.
3. Check the **Activate** check box to activate the scheduled job.
    - If you want to run the scheduled job manually, click **Start Manually** and the job will be executed immediately.
    - If you want the scheduled job to be run ***automatically***, set the desired time interval in **Scheduled job interval**. The time when the scheduled job will be run the next time will be displayed in **Next scheduled date**.
4. Click **Save** to save your changes.



Under the **History** tab, you can monitor the status and results when the scheduled job has been executed. If a job has failed, information about this will be displayed under **Message**.



EPiServer CMS-specific scheduled jobs

Automatic emptying of trash

You can set up how often your trash should be emptied with the **Automatic Emptying of Recycle Bin** job. With automatic emptying, all content in trash older than 30 days will be permanently deleted by default. Trash can also be emptied manually, then all content will be permanently deleted immediately.

The job is enabled by default, and set to run once every week.

Publish delayed content versions

You can define how often the system should check if there are content versions with a specific future publication date and time set with the **Publish Delayed Content Versions** job.

The job is enabled by default, and set to run once every hour.

Subscription

The **Subscription** feature in CMS allows visitors to define the frequency for receiving subscription information. This job will check for information from the system to be included and distributed in the subscription send-out.

Mirroring service

You can define the frequency for mirroring of content between websites with the **Mirroring Service** job. If your website is set up to mirror content from one website to another, this can be done either manually, or automatically at specific intervals.

Link validation

You can check links on your website to identify broken links with the **Link Validation** job. The system will try to contact the target for the link to verify that it is responding.

Only links that are unchecked or have been checked earlier than the time when the job started will be returned. The job will continue until no more unchecked links are received from the database. If a large number of consecutive errors are found for external links, in case of a general network problem with the server running the site, the job will stop.

The result of the link validation job is made available as a report called **Link Status**, in the **EPiServer CMS Report Center**.

Archive function

You can set how often the system should archive information after the publication period has expired with the **Archive Function** job.

> ***Note*** There can be a delay between the time when the information is unpublished, and when it appears in the archive. This may occur if the archiving job is only run once a day.

Remove unrelated content assets

You can delete all content folders containing media related to the deleted content items to removed pages or blocks with the **Remove Unrelated Content Assets** job.

The job is enabled by default, and set to run once every week.

Clear thumbnail properties

You can clear all the generated thumbnail images in the Products list and Media list views and add them again with the **Clear Thumbnail Properties** job. Run this job manually if you experience problems with refreshing thumbnails, for example, on the website and BLOB supported content.

Live Monitor maintenance

If Live Monitor is installed on your website, this job will remove Live Monitor generated data older than 24 hours from the database.

Change log auto truncate

You can delete items from the change log that are over one month old and do not have any dependencies registered against them by another part of EPiServer CMS (for example, Mirroring) with the **Change Log Auto Truncate** job.

The job is enabled by default, and set to run once every week.

Remove permanent editing

You can clear the **Permanently Mark as Being Edited** marking of pages in edit view (if editors have forgotten to remove the marking) with the **Remove Permanent Editing** job.

The job is enabled by default, and set to run once every hour.

Remove abandoned BLOBs

EPiServer CMS can store media files in a cloud service instead of the website's database. This job tracks deleted files in CMS and makes sure any stored data is also deleted from the BLOB provider used for storing the data.

The job is enabled by default, and set to run once every week.

Commerce-specific jobs

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. In a sample installation of EPiServer Commerce, a number of scheduled jobs will be added to the administration interface. The predefined Commerce-specific scheduled jobs are described in more detail in the following.

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 meta data

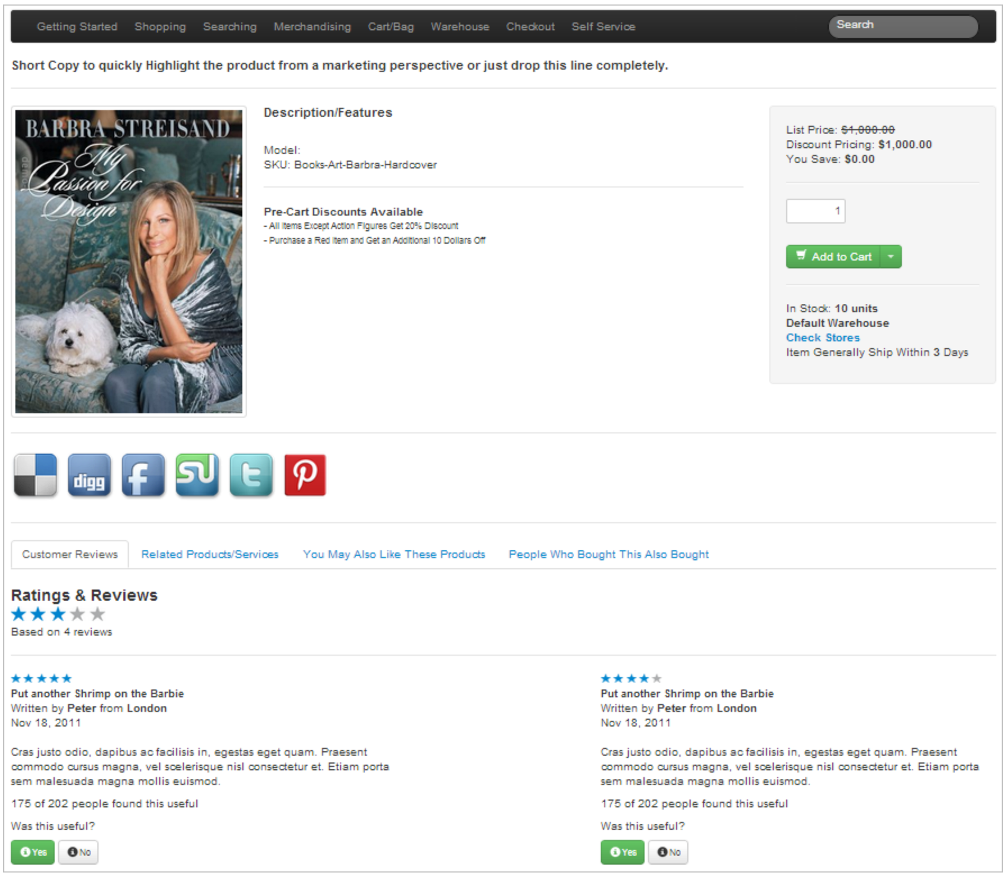
The **Serialize Catalog Meta Data** job is used for serializing catalog data to speed up the meta data retrieval when searching catalogs.

Shipment releasing

The **Shipment Releasing** 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".

Managing content

Content on a website can originate from different sources, depending on where on the site and by whom it has been created. On an e-commerce site the main content is usually made up by the products from the product catalog, and the exposure of these through various types of categorization, faceted navigation or filtering. This content is usually created "internally" by marketers, merchandisers and editors. Content can also be created "externally" by the "shopping community" through various social features on the website.



In EPiServer Commerce content can be information related to catalog entries such as product categories, products and variants. It can also be information entered in CMS pages and blocks. The work with content is done by different *user groups*, for instance merchandisers organizing the product catalog, managing pricing and enriching the product information, as well as marketers and editors creating campaign pages and promoting products. This section provides an overview of content management possibilities in EPiServer Commerce.

Working with product catalogs

The product catalog structure is conveniently managed from the **Catalog** view in Commerce. From here you can work with product categorization to create new categories and add products and variants to these. Relations between catalog entries are easily created through drag-and-drop functionality. Refer to *Product categorization* for more information.

Editing catalog entries

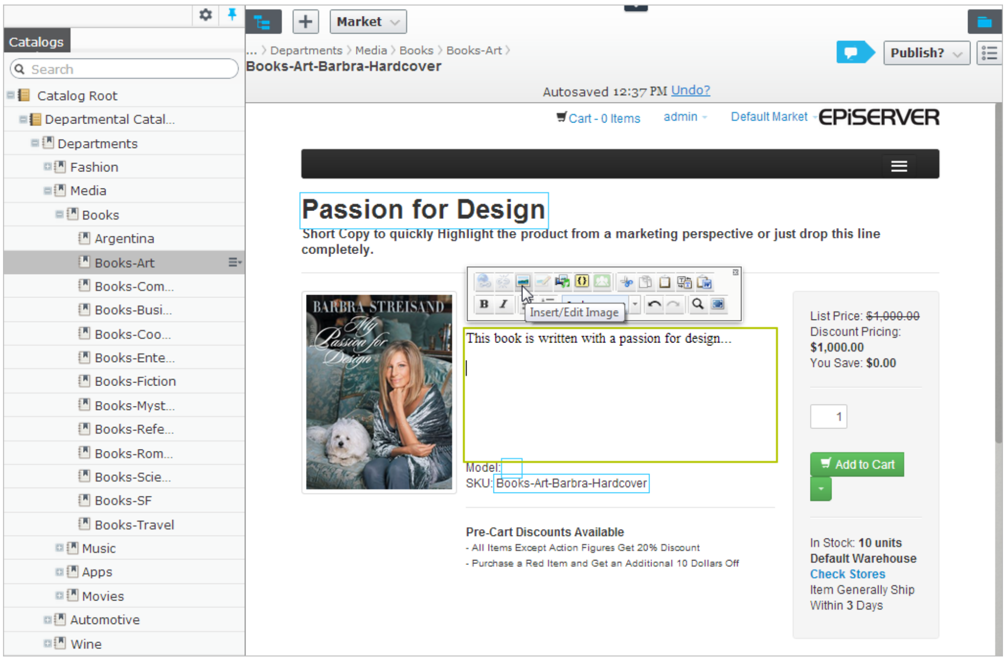
Catalog entries such as categories, products and variants can be quickly edited from the **On-Page Editing** view, or from the **All Properties** view providing access to additional properties for the entry. Changes done can be published directly on the website, or scheduled for later publishing, using the save and publishing flow in EPiServer. Refer to *Editing and publishing catalog entries* for more information.

Managing pricing

The **Pricing** overview available from the **Catalog** view in Commerce, offers a convenient way of managing pricing across products, markets and customer groups. You can view and compare prices filtered by markets and customer groups, and easily make adjustments as needed. Refer to *Managing pricing* for more information.

Content editing

Content editing can be for instance adding text, media such as images and videos, and links to properties in different content types, for instance adding a product description. Much of the same editing features are available when working with content in both CMS and Commerce.



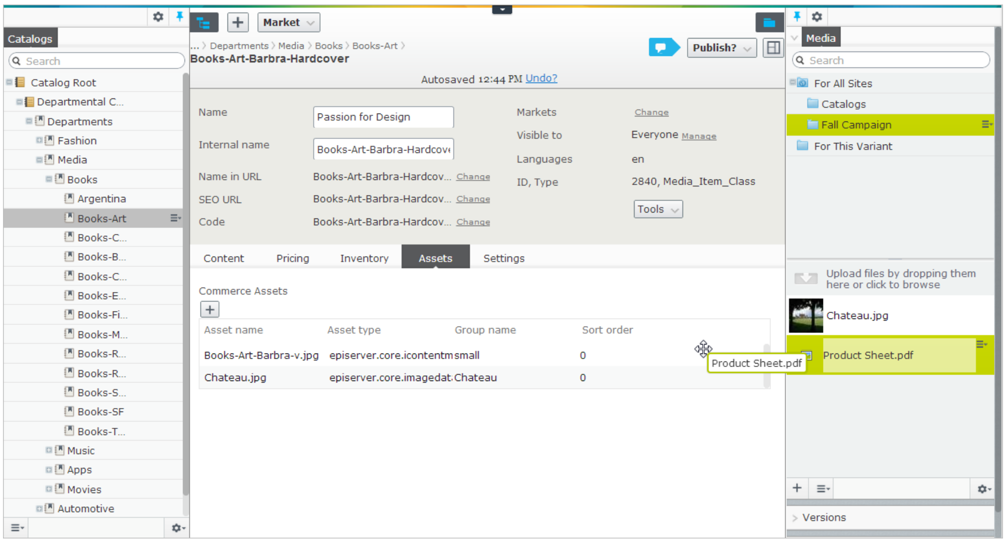
Editing features

Refer to the list below for more information on common editing features in EPiServer.

- *Editing views*
- *Rich-text editor*
- *Formatting text*
- *Adding images*
- *Creating links*
- *Previewing*
- *Saving and publishing*
- *Managing versions*
- *Translating content*

Drag-and-drop feature

The *Assets pane* available to the right in both CMS and Commerce, makes it easy to add information to different content using drag-and-drop. Depending on what you are doing, you can add different *gadgets* to the Assets pane. Drag-and-drop is available as an option in many places when editing content, for instance when creating relations and associating assets with products and their variants. You can for instance associate a variant with a product fact sheet document by dragging it from the **Media** tab into the **Assets** *drop area for the variant*.



Catalogs gadget

The *Catalogs gadget* is available in both CMS and Commerce. You can use this to add catalog items to pages and blocks in CMS using drag-and-drop. Or, you can create relation links between catalog entries by dragging catalog items into the **Relations** tab of other catalog entries. Refer to *Editing and publishing catalog entries* for more information.

Linking to catalog content

In Commerce, the *Link tool* has an additional feature allowing you to create links to catalog entries, for instance a product or a product variant. Refer to *Linking to catalog content* for more information.

Other features

Personalizing content

The *personalization* feature in EPiServer CMS can be used to target content towards specific visitor groups. You can for instance design campaigns based on *recent orders or the total spent amount* for a customer. The personalization option is available in the *rich-text editor*, and can also be applied to *blocks* if these are available on your website.

Multi-channels

The content you create for your e-commerce website can be shared and distributed through multiple channels such as mobile, social and e-mail. There is a preview function in EPiServer CMS where you can see how the content will look in a selected channel or resolution. Channels can easily be added to your site through code. Refer to the CMS user guide for more information.

Content optimization

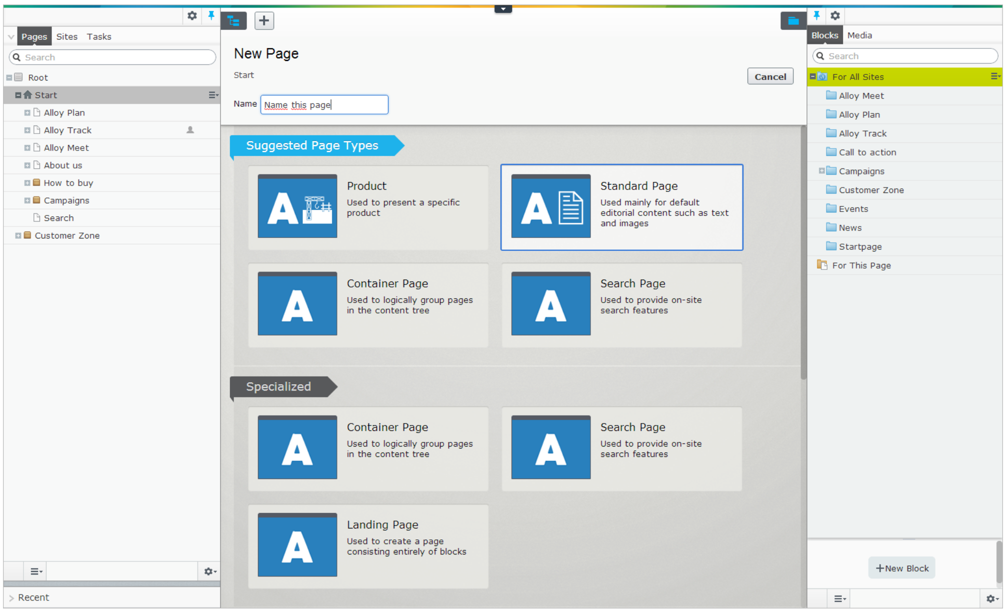
Optimizing content is about finding out which content results in the best conversion rate. A conversion means that the actual goal for the content is reached, for instance having visitors registering for an event or completing a purchase. From the EPiServer Add-on Store there are *additional modules* available for content optimization.

Creating content

Content can be for instance pages or blocks in CMS, or catalog entries in Commerce. In the following we will describe how to create various types of content in EPiServer.

Creating pages

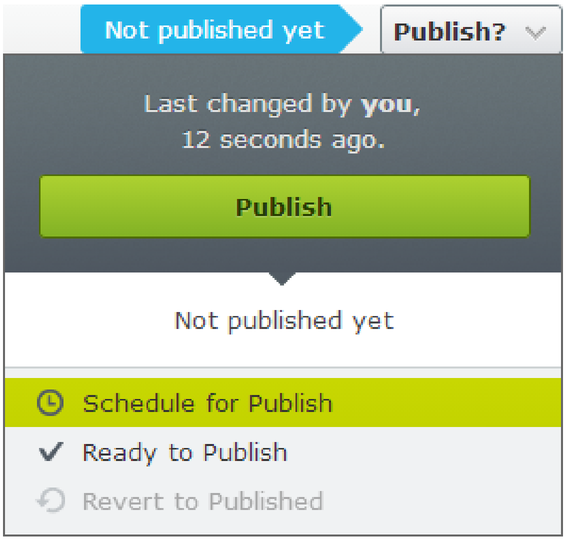
When you create a page in CMS, you need to select a page type. Depending on your access rights, all possible page types that are available for selection under a particular node are listed in groups. The most common page types are listed under the **Suggested Page Types** group by default, but your organization may have created other groups through configuration.



In this example we will create a page based on the page type **Standard page** on the sample site:

1. Select the page in the tree structure where you want the new page. The new page will be created under the page you have selected.
2. From the context menu in the navigation pane or the add button on the toolbar, select **New Page**.
3. In **Page name**, name the page otherwise it will be named “New Page” by default. The page name will be shown in the tree structure and in the menus.
4. Move the mouse pointer to highlight a page type. The page types are grouped together suggesting the most commonly used. Select the page type **Standard page**.
5. Start editing directly on the page. The **Main body** and **Secondary body** sections are highlighted editable areas in which you write the information. Toggle *all properties editing* to format the text, load images, create links and work with tables in the *rich-text editor*. The text in **Main body** will be displayed in the middle of the page and the text in **Secondary body** will be shown in the right column of the page.

6. *Preview* with several options, such as media channels. Your changes are automatically saved. You can continue to work with the page.
7. When you are done, click **Publish** to make the page accessible to visitors and appear in the menus. Or, send the page for review by clicking **Ready to Publish**.



For a description of saving and publishing options, as well as options for undo and redo changes, see *Saving and publishing content*.

Content status on the toolbar

When you are editing content in full width, you will see status information in full text on the toolbar as shown in the following examples:

The symbol of the pen means that the content is not available for editing until you cancel the settings, for example, a scheduled publishing.

When the navigation pane and assets pane are pinned, the toolbar shows the following status symbols of the content:

A page or a block that has been published will be in **Published Version** status and no status symbol is shown.

A page or a block that has been set to **Ready to Publish** will be in **Ready to Publish** status.

A new page or a block that has not yet been published or set to ready to publish, will be in **Not Ready** status.

A published page or a block that has been changed but not yet published, will be in **Not Ready** status. It could also has been set to **Ready to Publish**, if it was not approved it will be in **Rejected** status.

A page or a block that has been scheduled for publishing:

- New will be in **Published** status
- Changed will be in **Delayed Publish** status

Creating blocks

You can also create a block which is a piece of information, for instance a banner or a news listing, which can be inserted into the page you are editing. Blocks are useful when you want to reuse and share information components on your website. See *Blocks* for more information on how to create blocks.

Creating content based on other content types

Content can be for instance catalog entries such as products and variants in EPiServer Commerce. The creation of this type of content is similar to the creation of pages and blocks in CMS. Content can also be media files such as images and documents managed from the **Media** tab in the Assets pane, see *Assets – using shared content*.

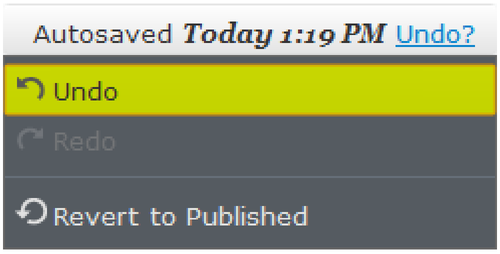
Saving and publishing content

You can preview the page as you are working with it, and your changes are automatically saved. Depending on your access rights for publishing of pages, you will have different options available. If you are done editing, submit it for review or publication. Or, continue working on the page.

You can either create a new page or edit an existing page for publishing as described in *Working in edit view* and *Creating content*.

Whenever you start working on a page after it has been saved, you will get a “draft version”. For version management of blocks, media and pages, see *Managing versions*.

Using autosave



When you are working with a page, you can see it being automatically saved through the autosave function with a system-generated timestamp. Click **Undo?** to select any of the following options:

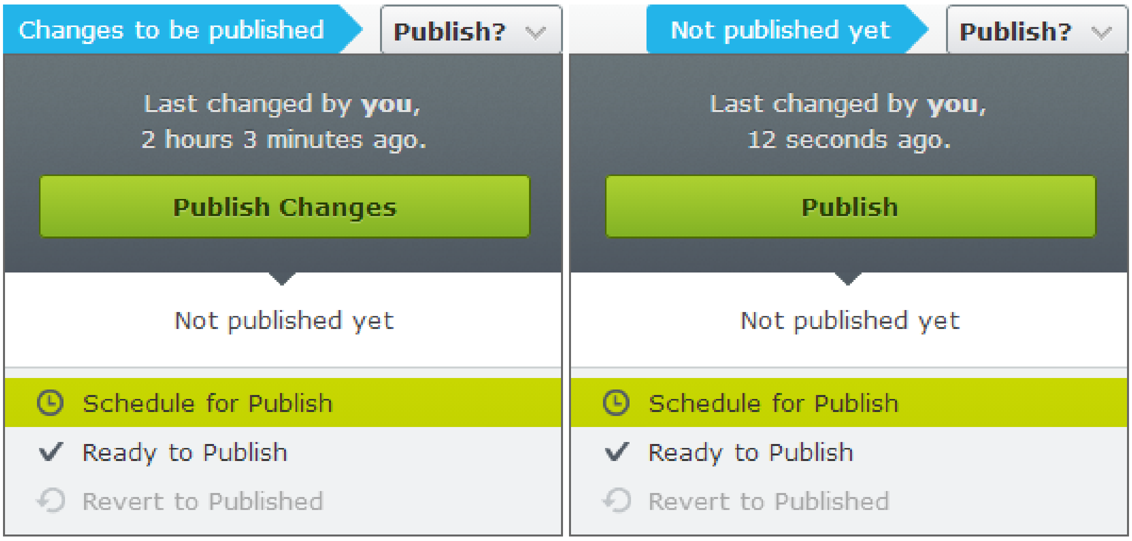
- **Undo** to discard your changes on the content you are editing. If you are editing with the flyout pane open, click **Done** and then **Undo**.
- **Redo** if you discarded your changes through **Undo** and want to take them back again.
- **Revert to Published** to take back the latest published version.

If there are several editors working on the same content, you will work with a shared draft by default, meaning that your changes are saved in the same version, see *Editing a shared draft version*. You can also create a new version.

Publishing a page

Publishing of content in EPiServer CMS provides different options depending on which specific context you are working in.

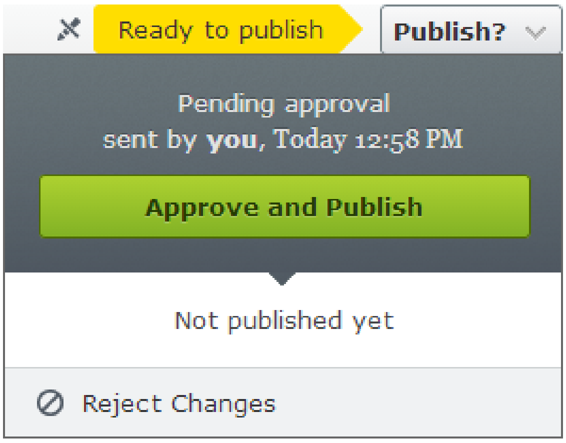
Clicking the combo button expands a drop-down menu containing several options. These options transform according to your access rights and the content version status.



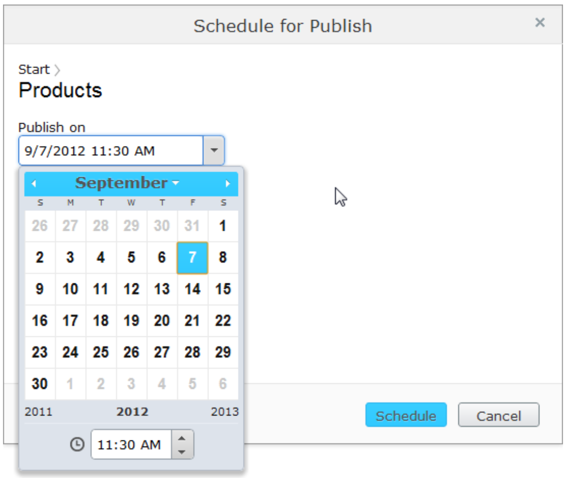
Under the publishing button you can see information about when and by whom the page was last changed and saved. Clicking **View on website** will take you to view the current published page as your visitors see it.

Depending on your access rights, you have the following options:

- **Publish**. To use this option you need to have access rights for publishing of pages. When you are done and select **Publish**, the button disappears and your changes are immediately visible to visitors. Successful publishing is confirmed by an action feedback and the page is set to **Published** version status.
- **Ready to Publish**. Use this option if you want to send the page for review to prepare it for publishing. This is most often used when you do not have access rights to publish information. Instead the page can be assigned to another person with access rights to approve pages before they are published. When you are done and select **Ready to Publish**, the page will be submitted for approval and available for publishing by someone with publishing access rights. Even if you are authorized to publish information, you may want someone to review the page. You cannot make any changes on a page ready to publish. Once a page is set to as ready to publish, the following options are available:
    - **Withdraw and Edit**. If you are an editor without publishing rights, select this option if you have sent a page for review but want to take it back for further editing.
    - **Approve and Publish**. Select this option if you are assigned to approve pages for publication.
    - **Reject Changes**. Select this option if you are assigned to approve pages for publication. If you reject the changes, the page will then be set to **Rejected** version status and the most recently published version will be displayed to the visitors.



- **Schedule for Publish**. You can schedule publishing of a page you have just created as well as an existing page you have made changes on. Selecting this option opens a window where you select a date for the publishing of the page to start. Click **Schedule for Publish** to apply your scheduled publishing, or select **Remove Scheduling and Edit** to continue editing. When you schedule a new page, the symbol of a clock will appear in the tree structure.
  Normally, pages are continuously updated and never expires, but you can set a date for the publishing to stop, see *Setting a stop date*.

  You cannot make any changes on a scheduled page. When you schedule publishing for pages and blocks, you have an option to create a new draft version. Select **Options** > **New Draft from Here**, and the new draft version opens for editing.
- **Revert to Published**. You can discard your changes of the page you are editing and take back the latest published version.
- **Republish**. You can select a previously published page version from the **Versions** gadget and publish it again by clicking **Republish**.

Tip You can schedule several versions of pages and blocks for publishing, for example, in a scenario of managing multiple campaigns and scheduling multiple banner adverts on a landing page. Use **New Draft from Here** to create another version for scheduling.

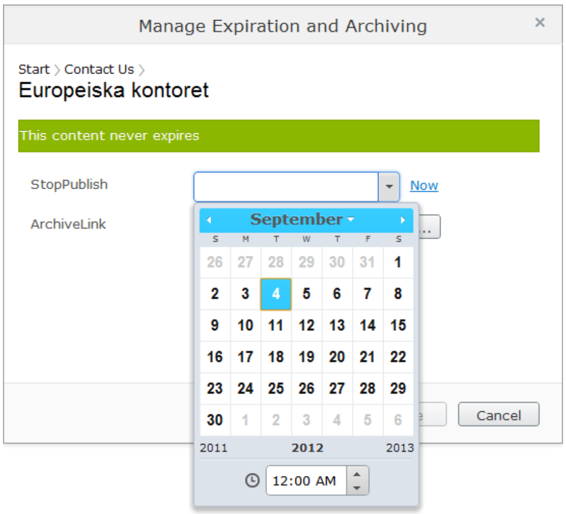
> ***Note*** If two users try to work with the same page simultaneously, the system will display a warning informing that your changes might be overwritten. To avoid version conflicts, you can use the feature **Permanently Mark as being Edited** in the all properties editing view.

> ***Note*** If you try to copy and paste content in the tree structure where you do not have access rights for publishing, then the pasted content will be created in a draft version.

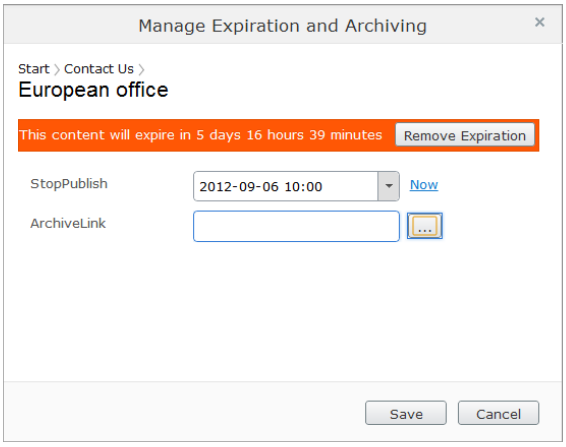
Setting a stop date

You can select a specific date and time for the content to not be visible to the visitors anymore. This is done from the all properties editing view.

1. In the **Tools** drop-down list, select **Manage Expiration and Archiving**.
2. Select the date and time when you want the page or block to stop being published, or select **Now** if you want it to apply immediately. You can also type the address where you want the content to be archived.

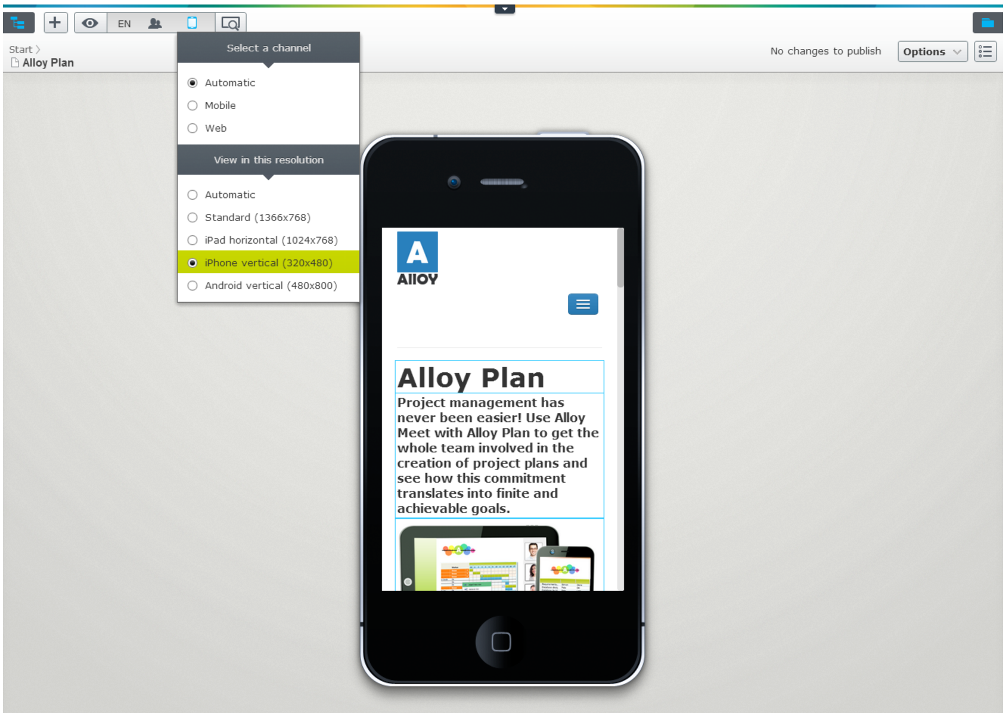


3. Confirm that you want the content to stop being published by clicking **Save**, or discard you changes by clicking **Remove Expiration**. When you set a page to stop being published, the symbol of a clock will appear in the tree structure.



Previewing

In EPiServer CMS you can preview the content that you are editing through different media channels, for example, a smart phone.



You have the following options to preview the content:

Preview. Toggle preview as the visitors would see it live. Click again to jump back to the editorial interface.

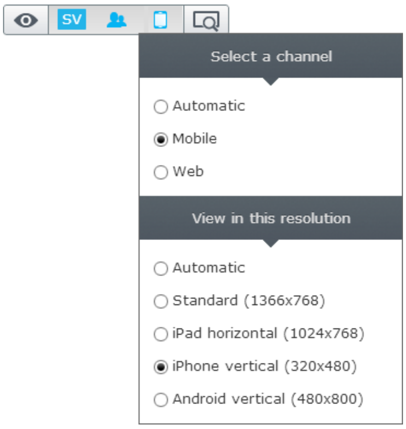
View settings. Click the eye symbol and select to preview the content in any of the following view settings:

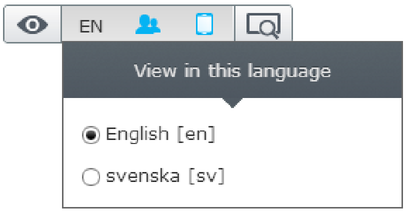
- **Languages**. When the view settings menu is open, you can view the page content in the current language. If other languages are activated in the editorial interface on the website, you can select any of these in the drop-down menu and translate the content.
- **Visitor groups**. You can view the page content as the visitor groups you have created for the website see it as described in *Personalizing content*.
- **Media channels**. Select to view the content as displayed for the presetson the EPiServer CMS sample site: **Automatic**, **Mobile** and **Web**. Then select the configured resolution, for example, a large screen or smart phone.

Tip You can combine toggling **Preview** and **View settings**.

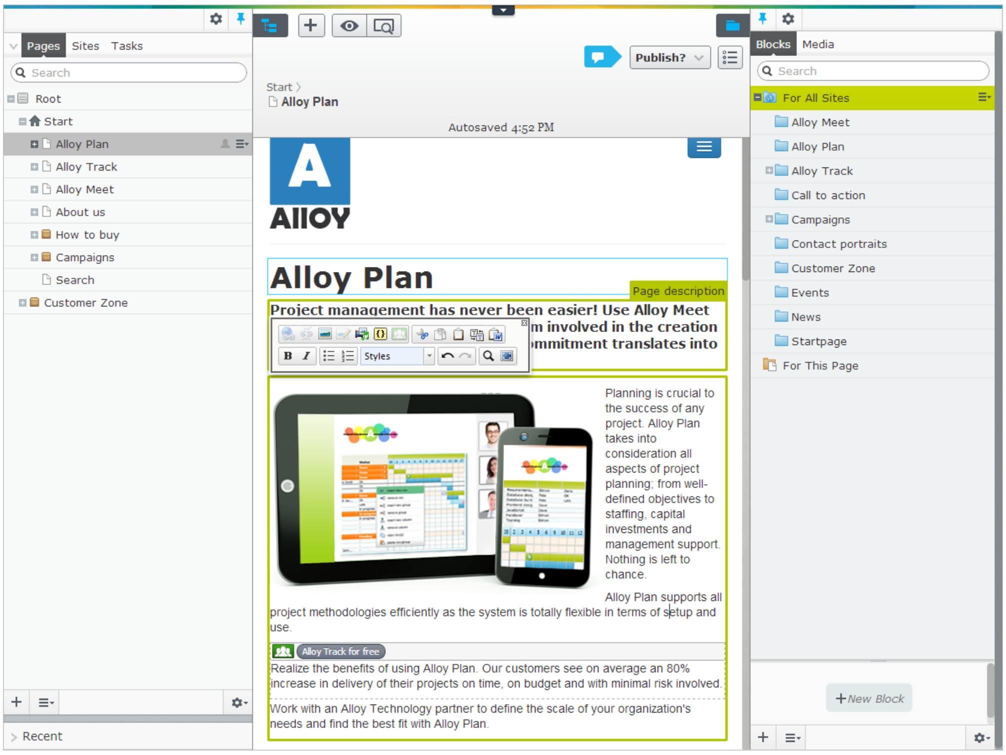
The preview settings for the presets are “sticky”, meaning that when selecting any of the settings you can browse several pages and keep that setting activated. You will also keep the preview setting when editing the page directly on the page, but if you switch over to *all properties editing view* as well as create new *pages* and *blocks*, the preview will be turned off. If you toggle the eye symbol to release it, the settings for the page will be set back to defaults.

Depending on how the website is configured, the presets can look as shown in the following examples of the sample site:





Using the rich-text editor



The **TinyMCE rich-text editor** is where you enter much of the information of the web page, such as text content, formatting, images, tables and links to other pages or documents.

EPiServer CMS comes with a limited selection of editor functions (buttons) that are normally activated on the sample site. Your system administrator can define which buttons to be available in the editor by activating or deactivating them in EPiServer CMS admin view.

The following buttons are available in EPiServer CMS:

	Insert and edit link	Display the link dialog box for insertion or editing of link. It appears dimmed until you select the text to be included in the hyperlink. See *Creating links*.
	Remove link	Remove a link from the selected text. It is dimmed until you place the cursor in the hyperlink.
	Insert image	Insert an image in the editor area of your page, and change image properties. See *Adding and editing images*.
	Edit image	Edit an image on your page.
	Insert and edit embedded media	Insert media content such as video into the editor area of your page. See *Inserting embedded media*.
	Insert and edit dynamic content	Insert dynamic content by using content from other pages to update the page.This means that the information only needs to be changed in one place for it to be updated on all the pages that use that information.
	Insert personalized content	Insert or edit personalized content. It is dimmed until you select the text to be included in the personalized content. See *Adding personalizing content*.
	Cut	Cut the selected text and put it on the clipboard.
	Copy	Copy the selected text and put it on the clipboard.
	Paste	Paste content as plain text from the clipboard to the editor area of your page.
	Toggle paste as rich/plain text	Toggle paste content to the editor area of your page as rich text or plain text. See *Copying text from other programs*.
	Paste from Word	Paste content into the editor area of your page with any word formatting of content cleaned up.
B *I*	Bold Italic	Select single words in the text to format it with bold or italic. You can remove all formatting by selecting the text and then select a style in the **Styles** drop-down list.
	Unordered list	Place the cursor to create a bullet list of the text.
	Ordered list	Place the cursor to create a numbered list of the text.
	Styles	Displays a drop-down list with available style formats for formatting text (which reflects the CSS style sheets on the website).
	Undo Redo	Undo or redo of previous actions.
HTML	Show HTML source	Display the HTML code. You can switch to HTML mode and check the code and make adjustments to the page.
	Toggle full screen mode	Toggle full screen and normal screen mode when working with large volumes of text and images. Click the button again to restore the editor area to its original size.
	Find	Search for and replace a text within the editor area of your page.

The rich-text editor in EPiServer also has the following supported functions:

- **Drag-and-drop support**. You can drag and drop blocks into the editor area as described in *Assets – Using shared content*, as well as links as described in *Creating links*.
- **Path and word count**. When you click a piece of text in the editor area while editing it, the HTML tag for the text will be displayed in the **Path:** section at the bottom left part. For instance, if you have formatted the text with bold, the **Path:** section will display "Path: p >> strong". This is useful to check that the text is correctly formatted.

In the bottom right corner of the editor area, the **Words:** field displays the actual word count for the content. This function can be turned off from the administrative interface of EPiServer CMS.

- **Spell checking**. Spell checking is available as an optional add-on in the Add-on Store. To be able to use this feature, your system administrator must install the add-on as described in the EPiServer platform documentation. Spell checking can also be done by using the built-in function of the web browser: Open the text you want to spell check for editing. Place the cursor in the text and select spell check on right-click. Follow the options available in the browser.

Formatting text

When you edit text in the rich-text editor, you want it to look in a conform style on the website irrespective of whether you are copying the text from a Word file or writing it from a blank page. Always use predefined formats in the CSS files to give the website a consistent look and feel, as well as for accessibility and search optimization reasons.

Copying text from other programs

You can copy text to EPiServer CMS from any program you want. The important thing is to paste the text in a way to follow the graphical profile of the website. By pasting the text the correct way you will avoid getting formatted text on the page not appearing in the way you want it to. You have the following options of pasting text into the editor area:

 **Toggle paste as rich or plain text** will paste the text as rich text by default. Toggle to paste as plain text.

 **Paste from Word** will keep the formatting from the Word document. To transform the text formatting from Word into the website’s style, for a successful result the headings and body text must be properly formatted using the available template styles in Word. When you copy text from Word and paste it into an page, for example, a ”heading 2” in Word will be converted into the ”heading 2”.

> *Tip* **Publishing from Office** is available as an optional add-on in the Add-on Store. To be able to use this feature, your system administrator must install the add-on as described in the EPiServer platform documentation.

Toggling paste as rich or plain text

Paste text with the **Toggle paste as rich/plain text** option as follows:

1. Select and copy the text in the program you want to copy from.
2. Select the page for editing.
3. Click the **Toggle paste as rich/plain text** button on the editor toolbar.
4. Use keys Ctrl+v or Cmd+v to paste the text.
5. Use the predefined styles to format the text.

Pasting text from Word

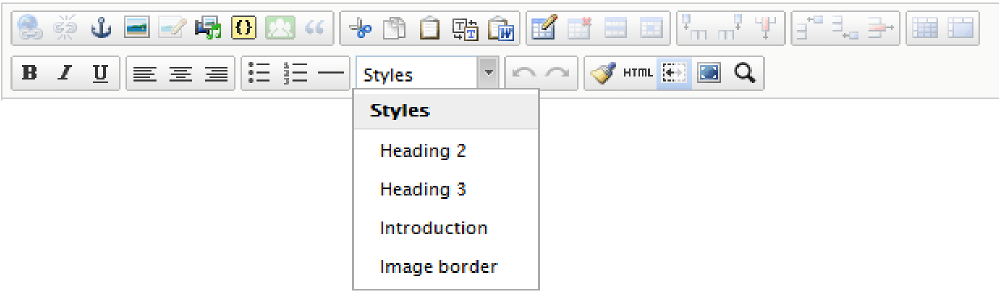
Paste text with the **Paste from Word** option as follows:

1. Select and copy the text in the program you want to copy from.
2. Select the page for editing.
3. Click the **Paste from Word** button on the editor toolbar.
4. Use keys Ctrl+v or Cmd+v to paste the content into the **Paste from Word** window.

5. Click **Insert** to insert the content into the page.
6. Use the predefined styles to format the text.

Formatting text

You can find the available formats in the **Styles** drop-down list on the editor toolbar, by applying CSS classes that are predefined for your website. In this way the correct HTML tags will be applied to your content. To set the style of the content on your website (headings, body text, and more), select the piece of content to be formatted and then the format you want in the drop-down list. For example, when you format a text with ”Heading 2”, these headings will have a uniform appearance all over the site.



This list can be extended to also contain different classes. You can for instance apply a specific introduction formatting to a text, apply a special table layout or position an image in the top right corner with the text floating around it.

You can emphasize single words in the text in bold, underlined or italic style by using the toolbar buttons, assuming that these buttons has been activated through the administrative interface.

To change and add formatting styles on your website and make them available in the editor, check with your system administrator.

Using keyboard shortcuts

Use the following standard keyboard shortcuts to quickly carry out formatting in the rich-text editor:

Command	Shortcut keys	Description
Select all	Ctrl+a or Cmd+a	Press to select all text and images in the rich-text editor. Useful if you want to cut or copy the content.
Undo	Ctrl+z or Cmd+z	
Redo	Ctrl+y or Cmd+z	
Bold	Ctrl+b or Cmd+b	
Italic	Ctrl+i or Cmd+i	
Underline	Ctrl+u or Cmd+u	
Copy	Ctrl+c or Cmd+c	
Cut	Ctrl+x or Cmd+x	
Paste	Ctrl+v or Cmd+v	Do not paste the text using Ctrl+v directly in the editor area, as this will paste it in with the format it had in the source program.
H1–H6 headings	Ctrl+1–6 or Cmd 1–6	
Paragraph break	Enter or Control+o	Press to get a **paragraph break**, which often provides extra space between the paragraphs (depending on how it is defined in the CSS file). A

Command	Shortcut keys	Description
		paragraph break will generate a </p> tag in the HTML code on your web page.
Line break	Shift+Enter	Press to get a **line break**, which provides none additional space between the lines. A line break will generate a </br> tag in the HTML code on your web page. It is better to use the paragraph break instead.

Note Depending on specific plug-in customizations in your implementation, and also on the browser you are using, certain shortcuts may not work properly as described.

Adding tables

Tables are used for organizing data in rows and columns to get a better overview of the information. The toolbar buttons for tables are not included on the EPiServer CMS sample site, which means that your system administrator must add them from the administrative interface.

When you insert a table, you select the number of rows and columns for the table. You can also define the appearance of the table, preferably by using predefined CSS table classes, but you also have the option of setting the properties manually.

Predefined CSS table classes will ensure that the tables will have a uniform appearance on the website, and this also the easiest way to format tables. Check with your system administrator to find out what applies for your website.

Creating a table

Create a table as follows:

1. Place the cursor where you want to insert your table.
2. Click the **Inserts a new table** toolbar button to open the **Insert/Modify table** dialog box. Under the **General** tab you can work with general settings for the table.
3. In **Cols** and **Rows**, set the number of columns and rows.
4. In **Cell padding**, you can define the space in pixels between the text in the cell and the cell borders. This is only necessary if you do not use a CSS class for table formatting.
5. In **Cell spacing**, you can define the space in pixels between the cells in the table. This is only necessary if you do not use a CSS class for table formatting.
6. In **Alignment**, you can define the position of the table, in case the table width does not take up the entire available space.
7. In **Border**, you can set the weight of the table border in pixels. Use this option if you want a table border and are not using CSS classes to format your table. Default value is zero.
8. In **Width**, you can set a fixed width for the table in pixels. If you do not specify a value here, the width of the table will adapt to the content using the full available space.
9. In **Height**, you can set a fixed height for the table in pixels. Most often the height of the table is controlled by the content, allowing the table to expand downwards.
10. In **Class**, you can specify a preset formatting to use for the table. Select an appropriate CSS table class from the drop-down list.

11. In **Table caption**, select to insert a table caption space for the table. The table caption allows you to enter a table heading above the table.
12. Click **Insert** to insert the table into the page. Continue by entering the table data into the table cells. You can move between the table cells using the arrow keys or the tab key.
13. When you are done, save the page.

Formatting the table header

To format the table correctly, you need to define the **header** of the table. For accessibility reasons, it is important to separate header cells from data cells when the table data is interpreted. You can format the header row manually by applying for instance bold formatting to the header row text, but this will result in an incorrect formatting of the table.

1. Open the table for editing and place the cursor in the first header row.
2. Select **Table cell properties** in the Toolbar.
3. In **Cell type**, select **Header** from the list. This will result in a <th> HTML tag for the header cell.
4. In **Scope**, select **Column** from the list to set the header for the entire column.
5. Select **Update all cells in a row** in the drop-down list to apply the same properties to all table cells in the header row.
6. Click **Update** to update the information for the table.
7. Save your changes. If you use CSS classes for formatting tables, you may see that table header is now updated with a specific header formatting.

Deleting a table

To delete a table, place the cursor in a table cell and select the **Delete table** toolbar button.

Organizing the table

You can reorganize the data or create more complex table structures, for example, by merging and splitting cells, as well as inserting and deleting rows and columns.

Merging cells

Merge cells in a table as follows:

1. Open the table for editing, place the cursor in one of the cells that you want to merge. This will be cell number one in relation to the cells that will be merged.
2. Select **Merge table cells** .
3. In **Cols**, type the number of cells you want to merge. For instance 2 if you want to merge two cells. You can merge any number of cells as long as the cells are next to each other in the table. The merge will occur to the right of the selected first cell.
4. In **Rows**, type the number of rows where you want to merge the cells. For instance 4 if you want to merge two cells on the nearest four rows. The merge will occur downwards counting from the first selected cell.
5. Click **Update** to merge the cells.

Splitting cells

Split cells in a table as follows:

1. Open the table for editing, place the cursor in the cell you want to split. Note that you can only split cells that have previously been merged.
2. Select **Split table cells** .

Changing the number of rows and columns

Insert and delete rows and columns in a table as follows:

Insert and delete columns. Place the cursor to insert columns before and after the selected column, and you can also delete a selected column.

Insert and delete rows. Place the cursor to insert rows before and after a selected row, and you can also delete a selected row.

Changing table properties

Once you have created a table you can change it and tailor it to your requirements. In the **Insert/Modify table** properties dialog box you will work with properties that affects the entire table such as the size of the table and its position on the page. When you are done, click **Update** to save the changes.

If you are using predefined CSS classes to format tables, rows or cells, be aware that additional formatting added “manually” on top of the predefined formatting, may be overridden and will not apply.

General tab

The **General** tab contains the following boxes:

- **Cols/Rows**. Set the number of columns and rows in the **Cols** and **Rows** fields.
- **Cell padding**. Define the space in pixels between the text in the cell and the cell borders. This is only necessary if you do not use a CSS class for table formatting.
- **Cell spacing**. Define the space in pixels between the cells in the table. This is only necessary if you do not use a CSS class for table formatting.
- **Alignment**. Define the position of the table, in case the table width does not require the entire space available. Select **Center**, **Left** or **Right**.
- **Border**. Set the weight of the table border in pixels. Use this option if you want a table border and are not using CSS classes to format your table. Default value is zero.
- **Width**. Set a fixed width for the table in pixels. If you do not specify a value here, the width of the table will adapt to the content using the full available space.
- **Height**. Set a fixed height for the table in pixels. Most often the height of the table is controlled by the content, allowing the table to expand downwards.
- **Class**. Select an appropriate CSS table class from the drop-down list.
- **Table caption**. Insert a table caption space for the table so you can type a table heading above the table.

Advanced tab

The **Advanced** tab contains the following boxes:

- **ID**. Type the ID number for the table for accessibility purposes.
- **Summary**. Type a description of the table content for accessibility purposes.
- **Style**. View the current settings for the table. This option can be used to set style attributes, overriding values specified in CSS classes. Normally you should use CSS classes, but if you want to apply a special style settings only used on this element, you can use this option.
- **Language code**. Define a language here if the content of the table is in a different language than the rest of the page. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
- **Background image**. You can select a background image to be applied to the entire table. Click the **Browse** button to the right of the field to select an image in the *media library*. Click **OK** to add the image to the table.

- **Frame**. Specify which parts of the **outside** borders that should be visible. Refer to accessibility programming standards for explanation of the attribute values.
- **Rules**. Specify which parts of the **inside** borders that should be visible. Refer to accessibility programming standards for explanation of the attribute values.
- **Language direction**. Define the language direction for the table, if this is different for what applies to the page.
- **Border color**. Select a border color for the table. You can select colors using the options **Picker**, **Palette** or **Named**, depending on your preferences. Click **Apply** to add the color selection to the table.
- **Background color**. Select a background color for the table. You can select colors using the options **Picker**, **Palette** or **Named**, depending on your preferences. Click **Apply** to add the color selection to the table.

Table row properties

In the **Table row properties** dialog box you can control settings that will apply to a specific row of a table. For instance, if you want to apply red background color to certain rows in a table, you will use the **Table row properties** dialog box. When you are done, click **Update** to save the changes.

General tab

The **General** tab contains the following boxes:

- **Row in table part**. Set the number of columns and rows in the **Cols** and **Rows** fields.
- **Alignment**. Define the position of the text in the cells of the table row.
- **Vertical alignment** . Define the vertical position of the text in the cells of the table row.
- **Class**. Select an appropriate CSS table class from the drop-down list.
- **Height**. Define a specific height in pixels for a specific row of a table.
- **Update current row**. When you make changes to table rows, you can decide where to apply the changes:
  - Update current row (the selected row)
  - Update odd rows in table
  - Update even rows in table
  - Update all rows in table

Advanced tab

The **Advanced** tab contains the following boxes:

- **ID**. Type the ID number of the table row for accessibility purposes.
- **Style**. View the current settings for the table row.
- **Language direction**. Define a language direction here if this is different from the rest of the table.
- **Language code**. Define a language code here if the content of the table row is in a different language than the page. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
- **Background image**. Select a background image to be applied to a table row, and click **OK** to add the image.
- **Background color**. Select a background color for a table row.

Table cell properties

In the **Table cell properties** dialog box you can control settings that will apply to a specific cell of a table. For instance, if you want to apply a yellow background to a certain cell in the table, you will use the **Table cell properties** dialog box. When you are done, click **Update** to save the changes.

General tab

The **General** tab contains the following boxes:

- **Alignment**. Defines the position of the text in the cell.
- **Vertical alignment** . Defines the vertical position of the text in the cells of the table row.
- **Cell type**. Define if the content in the cell is *data* or belongs to a *header*, select option **Data** or **Header**. This is used for applying correct formatting to a table, but also for accessibility purposes.
- **Scope**. Define whether the cell is a *row* cell or a *column* cell, for those cells that are columns headers or row headers for accessibility purposes.
- **Width**. Define a fixed width in pixels for a specific cell in a table.
- **Height**. Define a fixed height in pixels for a specific cell in a table.
- **Class**. Select an appropriate CSS table class from the drop-down list.
- **Update current cell**. When you make changes to table cells, you can decide where to apply the changes:
  - Update current cell (the selected cell)
  - Update all cells in a row
  - Update all cells in table

Advanced tab

The **Advanced** tab contains the following boxes:

- **ID**. Type the ID number for the table cell for accessibility purposes.
- **Style**. View the current settings for the table cell.
- **Language direction**. Define a language direction for the cell here, if this is different from the rest of the table.
- **Language code**. Define a language code here if the content of the table cell is in a different language than the rest of the table. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.
- **Background image**. Select a background image to be applied to a table cell, and click **OK** to add the image.
- **Border color**. Select a border color for the cell. You can select colors using the options **Picker**, **Palette** or **Named**, depending on your preferences. Click **Apply** to add the color selection to the table.
- **Background color**. Select a background color for a cell.

Adding dynamic content

Dynamic content can be added to a page by retrieving it from different **fields** on a page. For instance the content can come from the “main body” field (the editor area on a page), or from the saved date.

> ***Tip*** To reuse content, consider using blocks instead as described in *Assets – Using shared content*.

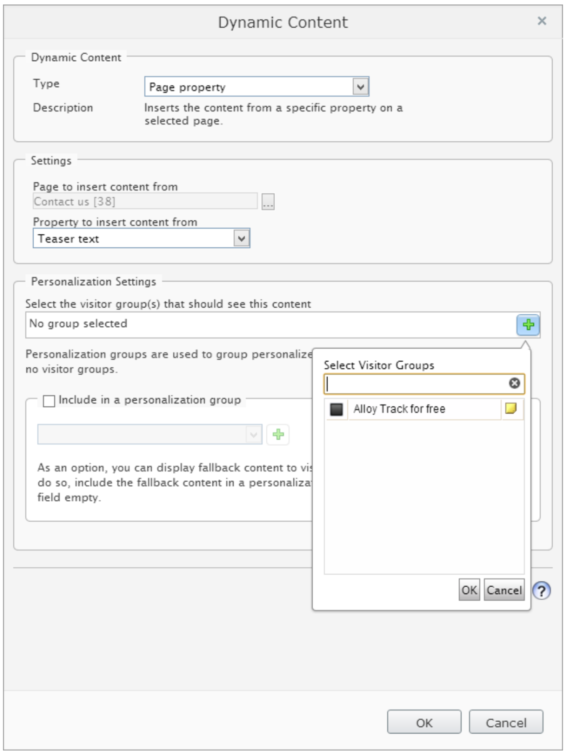
An example of the usage of dynamic content is to display company facts and figures that will be reused on several pages on a website. You may want to show information about your sales revenue over the past three months.

In addition, you can combine dynamic content with a visitor group as described in *Personalizing content*.

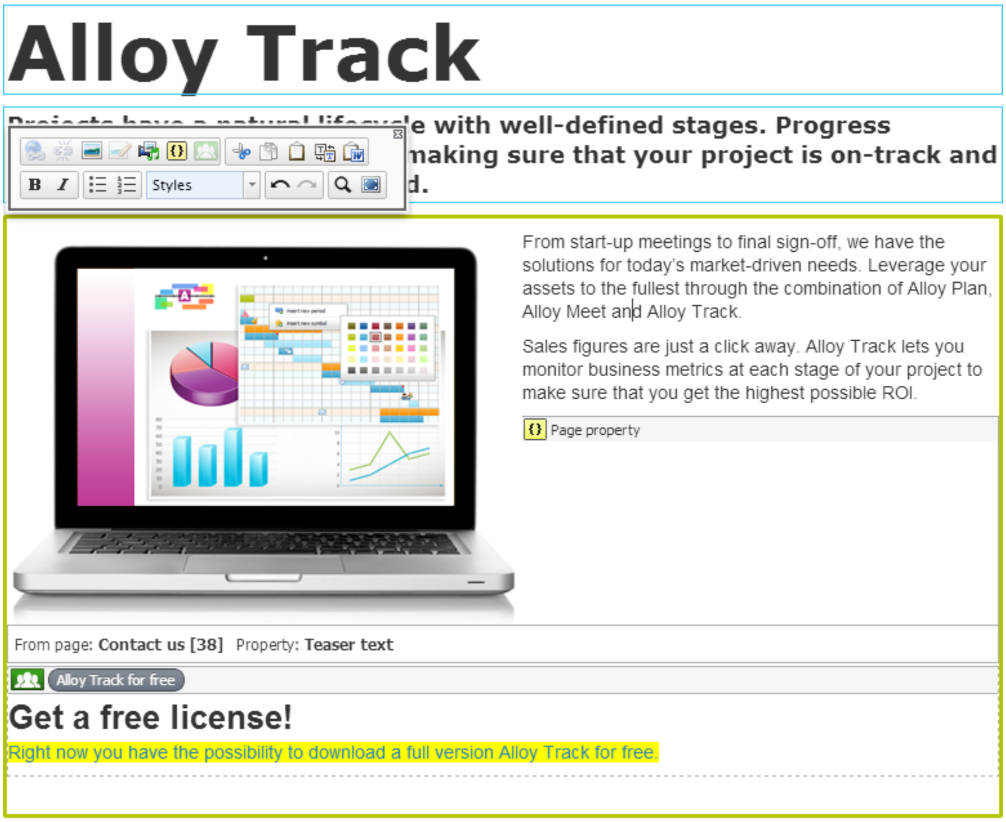
Adding dynamic content from a page property

Add dynamic content from a **Page Property** as follows:

1. Open the page or block that you want to contain the dynamic content and click the **Dynamic content** button on the editor toolbar.
2. In the **Dynamic content** window, select the plug-in that you want to use as a base for your dynamic content. The **Page property** plug-in is included in an EPiServer CMS standard installation and is used in this example.
3. In **Page to insert content from**, select the page in the tree structure from which you want to display the data.
4. In **Property to insert content from**, select the property on the page that you want to display data from. In this example we will fetch data from the **Main body** property of a page.
5. In **Personalization settings**, you can click **+** to select the visitor group you want to have access to the dynamic content. Optional.



6. Click **OK**. The dynamic content is displayed as a box in the editor area. When this property is updated, all dynamic instances of the property in the content will be automatically updated.



7. *Preview* the content.
8. *Publish*.

Editing dynamic content

You can cut, copy and paste dynamic content boxes in the editor area, just as you can with any other objects. When you have opened the page containing the dynamic content box, you can edit it in the following way:

1. Select the “box” with dynamic content in the editor area, and click the **Dynamic content** toolbar button .
2. Make your changes to the dynamic content and click **OK**.
3. *Publish*.

Note Cut and copy for a dynamic content box in the editor area may work differently depending on the browser you use. You may have to use either the cut and copy editor toolbar buttons, or the right-click cut and copy of your browser, instead of the keyboard keys. If you have trouble placing the cursor immediately before or after a dynamic content box in the editor area, try using the keyboard arrow keys instead of the mouse.

Deleting dynamic content

Select the dynamic content box you want to delete and click **Delete**.

Creating links

When you edit a page or block, you can link to another content, this can be external assets and content on the website. About how to insert pages and blocks on a page, see *Assets – Using Shared Content on a Page*.

In EPiServer CMS you can work with links mainly in the following ways:

- **Link collection** is an area (property type) that has been defined in the content type, where you can add and edit a group of links, for example, see the footer on the start page on the sample site. It is a quick way to add and rearrange links to pages and media on the website through drag and drop, and works in a similar way as for a standard content area.
- **Rich-text editor** is a way to create links on all content types containing a rich-text editor area, and that might not have a link collection area. To insert links using the rich-text editor, see the following sections:
  - *Content on the website*
  - *Documents*
  - *E-mail addresses*
  - *Images*
  - *Anchors to specific sections on a web page*

> ***Tip*** For accessibility reasons (for example, people who are visually impaired) it is important to describe the link in words by typing a text in the **Title** box.

Linking to content using a link collection area

To link to pages, blocks and media, you can drag and drop it to a link collection area. In the dialog you can also create links by entering e-mail and external source, such as a document on an another website.

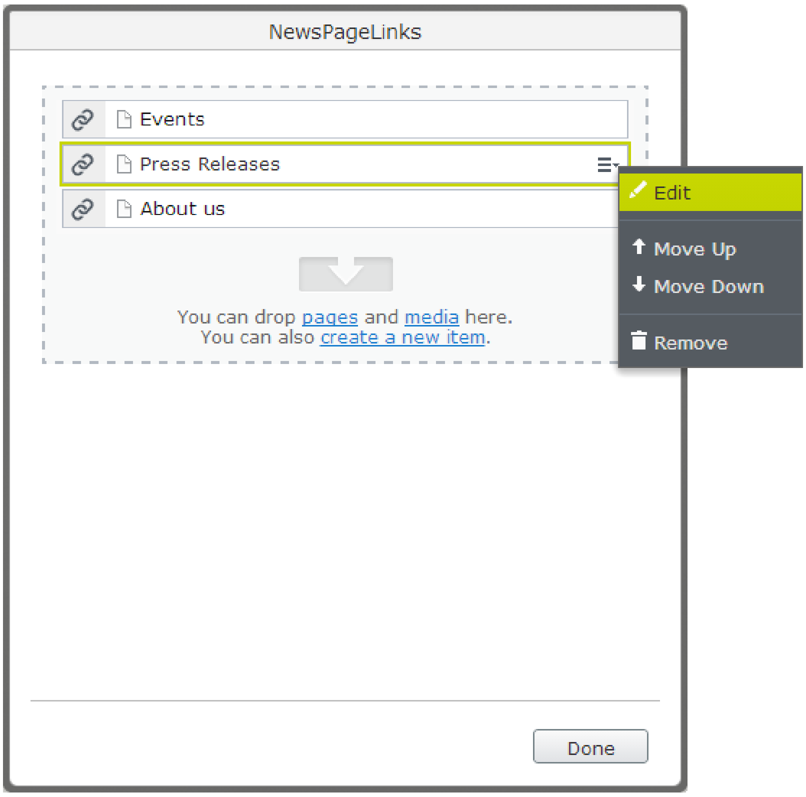
Creating and editing a link collection

Create and edit the link collection as follows:

1. Select the page where you have the link collection.
2. Click one of the highlighted areas with links on the page.

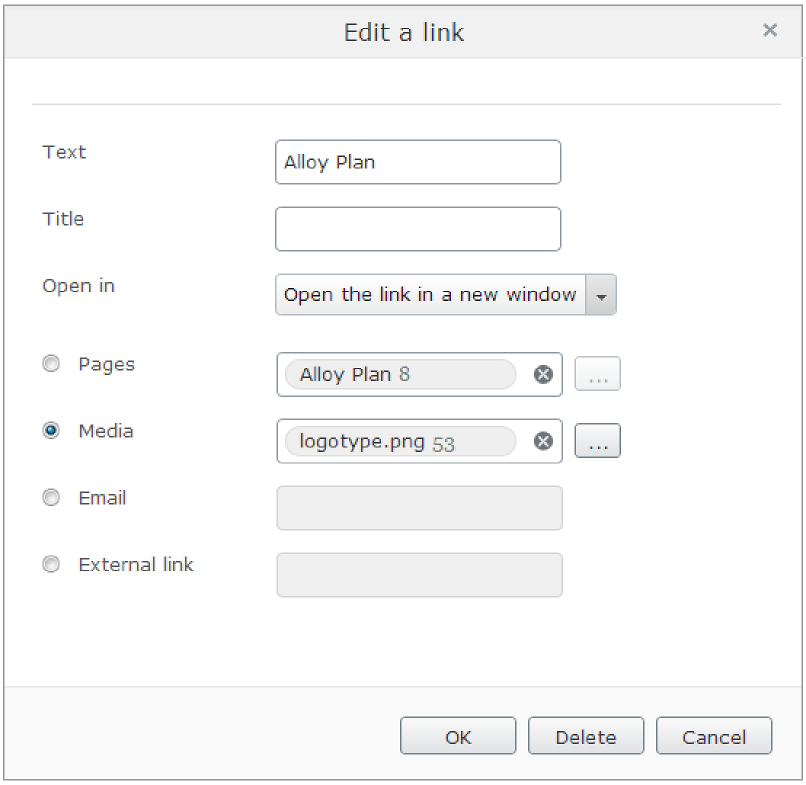
3. When the flyout pane appears, you can drag a page or media item (image, document, video) to the link collection area, or clicking **Create a new link**.

4. You can rearrange the links by moving and removing them through drag and drop in the flyout pane, or using the context menu.



5. Select **Edit** in the context menu to edit the link settings. The content name will be displayed in the link, but you can rename it if you want. Here you can also change other settings, for example, selecting that the page should open in a new window or selecting another link type “E-mail” and

entering an e-mail address instead. Click **OK**.



6. When you are done, publish the page in any of the ways as described in *Saving and publishing content*.

Deleting a link in the collection

Clicking the **Delete** button will remove the link. You can also remove content on the website by clicking
.

Linking to content using the rich-text editor

To add and edit links to pages, media, e-mail or external links, you can use the following buttons in the *rich-text editor* toolbar:

	Insert and edit link	Display the link dialog box for insertion or editing of link. It is dimmed until you select the text to be included in the hyperlink.
	Remove link	Remove a link from the selected text. It is dimmed until you place the cursor in the hyperlink.

Linking to a page

You have the following options to link to a web page:

Linking to a page on your website through drag and drop

Create a link to a web page on your website by drag and drop as follows:

1. Open the page in the editor area to which you want to insert the link.
2. You have the following options to create a link:
   - Drag the page from the tree structure to your page in the editor area and drop it. The page name will form the link.

- Select a piece of content (an image or a text) in the editor area that you want to act as the link, and drag the page from the tree structure and drop it over the selected content in the editor area.

3. When you are done, publish your changes.

> ***Tip*** Another way to link to your content is to use drag and drop pages and blocks as described in *Assets – Using shared content on a page*. This kind of content can contain links to pages on your website.

Linking to a page on your website

Create a link to a web page on your website as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**.
3. In **Title**, type the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened. If nothing is selected here, the link will open in the same window.
5. Select **Pages**, browse the page you want to link to in the tree structure, click **OK**.
6. If you are using multiple languages on your website, you can select language for the page. Under **Language** you can select which language version of the page will be shown. Select the language from the list, or select the **Automatic** option. If you choose the latter option, which is most common, the visitor is automatically directed to the language version they are using.
7. Click **OK**.

> ***Tip*** If you have trouble finding the page you want to link to, you can use the search function at the top of the dialog. Enter the entire or part of the page's name or the page's ID number and select **Search**.

Linking to a page on another website

Create a link to a web page on another website as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**.
3. In **Title**, type the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened. For external links, it is recommended that you open the page in a new window.
5. Select **External link** and enter the web address (URL) you want to link to, an external website, page or document. Valid external links contain the prefix http, https, ftp and file, for example, http://externaldomain.com.
6. Click **OK**.

Linking to a media file

You can create links to media and documents on the website, which are available on the **Media** tab in the assets pane. You can also link to media and documents on a file server or on another website. You can link to any type of document formats.

Depending on the type of document, and the settings of the computer from which a link is opened, the behavior will vary. For instance, if you download a Word document and you have Word installed on your computer, the application will be launched and the document will be opened inside Word. If Word is not installed, you will be prompted to save the file. On public websites, the pdf file format is often used since these files can be opened and displayed directly in the web browser.

Linking to a document on your website through drag and drop

Create a link to a document by dragging and dropping i directly from the **Media** tab to a content area as follows:

1. Open the page and select the document you want to insert, drag it from the media library and drop it in the editor area of the page. The document file name will form the link text, you can change this later if you want.
2. To change the link properties, select the link and click the **Insert/edit link** button in the editor toolbar, click **OK**.

Linking to a document on your website

Create a link to a document on your website from the **Media** tab as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**.
3. In **Title**, type the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened.
5. Select **Media**, browse the page you want to link to in the folder structure, click **OK**.

Linking to a document on a file server

Create a link to a document file server (for example, on the local network) using the rich-text editor as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link**.
3. In **Title**, type the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened.
5. Select **Media** and enter the path to the file you want to link to. Enter the complete path with the computer name, and the entire folder path ending with the file name, including the file extension.
6. Click **OK**.

Linking to a document on another website

Create a link to a document on another website as described in *Linking to a page on another website*.

Linking to an e-mail address

Creating a link to an e-mail address gives visitors the option of sending e-mails directly. When a visitor clicks on the link, their e-mail client opens and the address that you have specified is automatically entered in the address field of the e-mail.

Create a link to e-mail address as follows:

1. Select the words that will form the link.
2. Select **Insert/edit link**.
3. In **Title**, type the text that will be shown as a tooltip to the link.
4. Select **E-mail**, enter the e-mail address and click **OK**. The “mailto:” prefix will be added automatically.

Creating a link from an image

You can create a link from an image, for example, to another web page. You can also create thumbnail images in the *EPiServer CMS image editor* and link them to display the images in a bigger size. Create a link from an image as follows:

1. Select the image that you want to create a link to.
2. Select **Insert/edit link**. Depending on the type of link you want to create, select the appropriate tab **Pages**, **Media** or **E-mail**.
3. In **Title**, enter the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened. For external links, it is recommended that you open the page in a new window.
5. Select **OK**.

Creating an anchor

An anchor (also called bookmark) is a link to a place on the same page. Anchors are useful when you have a long text which you want to divide into sections. The reader can then use the links to jump between the sections. A typical example is a table of content, where each section is an anchor link. You can also create an anchor link from each section to go back to the top of the page.

When adding anchors, you first create the anchor so that you can select it in step two, where you create the link to the anchor.

Step 1: Inserting an anchor

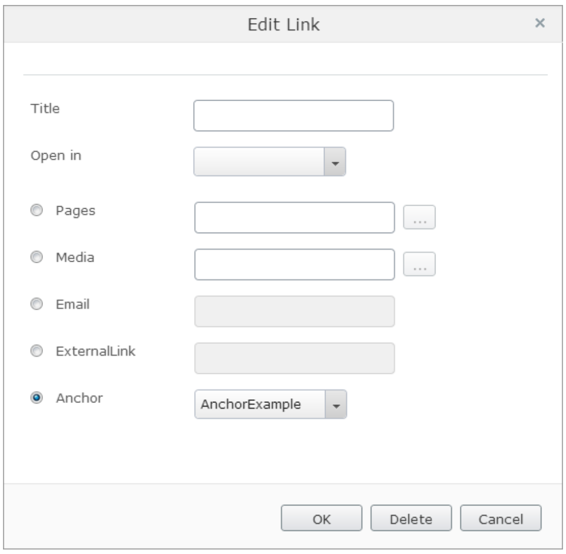
Insert an anchor on the page as follows:

1. Select the text where you want to place an anchor.
2. Select **Insert/edit anchor** from the editor toolbar.
3. In **Anchor name**, type a name for the anchor. Avoid using any special characters or spaces.
4. Click **Insert**.

Step 2: Adding a link to anchor

Create a link to an anchor as follows:

1. Select the text that will form the link.
2. Select **Insert/edit link** .



3. In **Title**, type the text that will be shown as a tooltip to the link.
4. In **Open in**, select how the link is to be opened.
5. Select **Anchor** and the anchor item you want to link to (all the anchors on the page are listed).
6. Click **OK**.

Changing an anchor

Change the anchor as follows:

1. Select the anchor you want to edit.
2. Select **Insert/edit anchor** from the editor toolbar.
3. In **Anchor name**, edit the anchor text.
4. Click **Update**.

Removing an anchor

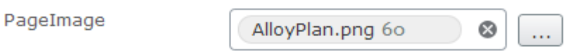
Remove the anchor as follows:

1. Select the anchor you want to remove.
2. Press Delete or Cmd+Delete on your keyboard.
3. Update links that are pointing to the anchor that has been removed.

Using other link types

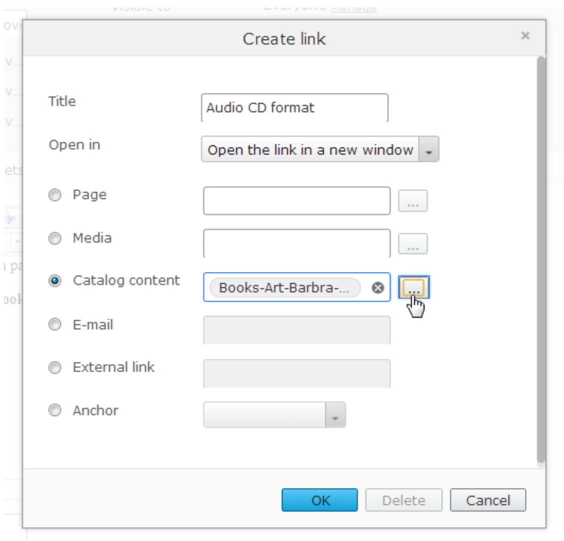
In case the page type does not have the link collection property or the rich-text editor, it might contain the URL property. This property is only available in the ***all properties editing view***.

The following example shows a property that only can contain an image:



Linking to catalog content

The *Link* tool in EPiServer is available from the *toolbar in the rich-text editor*. Using the link tool you can create links to for instance documents and other web pages and websites. In Commerce, the link tools has an option where you can create links to products or variants in the *product catalog*.



Adding a product link

Do the following to create a link to an item in the product catalog:

1. In the rich-text editor, select the text, files or images where you want to add a link.
2. Select the **Insert/edit link** tool in the toolbar.
3. In the **Create link** dialog, select the **Catalog content** option and click to access the catalog content. Expand the catalog, select the desired entry to link to and click **OK**.
4. Enter the link title and target frame if needed and click **OK**.

Adding and editing images

Unlike many other computer applications, a web page does not embed images. Instead, it uses a link to the image and location in the media library where the image is stored. To display images in content they must be available in the media library on the **Media** tab.

The **Image Editor** in EPiServer provides basic image editing features such as cropping, resizing and transforming. The edited image file can either be saved as a copy, or replace the original file.

You can access the image editor in the following ways:

- From the **Media** tab in the assets pane.
- From the rich-text editor. Here you can also edit the image properties, for example, apply a CSS class to the image.

In the rich-text editor, you can work with the following image editing tools:

 Click to insert or edit an image for the content, or to change image properties.

 Click to access the image editor to change the image file.

Adding an image through drag and drop

Insert one or several images by dragging and dropping them directly into a page as follows:

1. Edit the page, and select the **Media** tab.
2. Select the image you want and drag it where you want it on the page.

Adding an image through the rich-text editor

Insert an image into a page as follows:

1. Place the cursor in the editor area of your page where you want to insert your image.
2. Click the **Insert/edit image** button  on the editor toolbar.
3. In **Image description**, type a description of the image.
4. In **Title**, type a title for the image to be displayed when the mouse pointer is moved over the image.
5. In the **Media** window, select the image in the tree structure. Insert the image by clicking **OK**.
6. Click **Insert** and the image will be linked to the page.

> ***Tip*** For accessibility reasons (for example, people who are visually impaired) it is important to describe the image in words by typing a text in the **Image description** box.

Editing an image through the rich-text editor

The easiest way to edit an image through cropping, resizing and transforming is on the **Media** tab, but you can also use the rich-text editor, see *Managing media*. There you can also remove or replace an image in the media library.

Edit the image as follows:

1. Select the image on the page you want to change.
2. Click the **Image Editor** button on the editor toolbar and make the changes to the image.
3. When you are done, save the image as a copy or replace the original file.

> ***Tip*** You should always try to have as small file size for images as possible on web content to avoid long downloading times. Therefore compress the image to a smaller file size by cropping or resizing it. Web pages often have a limit for how wide the images can be (usually around 500–600 pixels), check this with your system administrator. For cropping and resizing images it is also possible to select predefined sizes from the **Preset** list, defined by the system administrator in the **web.config** file of your website.

Changing image properties

Change the way an image appears by changing its properties as follows:

1. Select the image you want to change in the editor area.
2. Click **Insert/edit image** button on the editor toolbar.
3. On the **General** tab, you can change the **Title** and **Image description**. Click **Update** to save your changes.
4. On the **Appearance** tab, you have the following options of positioning images in relation to text:
   a. In **Dimensions** , you can change the display size of an image. Ensure that **Constrain proportions** is selected in order to keep the image proportions. Enter the width of the image in pixels, and the height will be changed accordingly. ***Note*** Be careful with this option, it may cause the page to load slowly.
   b. In **Class**, select a CSS class if any are available for positioning images on your website. Or, select an option in **Alignment** to manually position the image.
   c. In **Vertical space** and **Horizontal space**, add a value in pixels for the space between the image and the surrounding text if it is not handled by the CSS class. Imagine that you have a large amount of text on a page and want to place an image in the top right corner with the text floating around it with some space padding between the image and the text. The preview window allows you to see the result of the different options you choose.
   d. In **Border**, add a value in pixels for the image border if it is not handled by the CSS class.
   e. Click **Update** to save your changes.
5. On the **Advanced** tab, you can change any of the following:
   a. Select **Alternative image** to add different images for **mouse over** and/or **mouse out**. Browse to select the images in the media library. For best results, these images need to have the same size proportions in pixels.

b. In **ID**, you can set a unique identifier for the image. The ID can be referenced by style sheets or by a JavaScript providing additional functionality.

c. In **Language direction**, you can set the language direction (left to right or right to left) for the description, title and other text attributes specified for the image.

d. In **Language code**, set the desired language, for example, if you have an image showing content in a different language than the actual page. Enter the standard language code format, for example it (Italian), es (Spanish), en (English) etc.

e. In **Image map** you can associate an image map with the image. Image maps are used to map certain areas of an image to links or other actions. There is currently no built-in way to create image maps in TinyMCE.

f. In **Long description link**, type a link to provide a longer image description than what fits in the description field. Note that most visual browsers do not support this feature, this is primarily an accessibility feature.

g. Click **Update** to save your changes.

> ***Tip*** You should always try to have as small file size for images as possible on web content to avoid long downloading times. Therefore compress the image to a smaller file size by cropping or resizing it. Web pages often have a limit for how wide the images can be (usually around 500–600 pixels), check this with your system administrator. For cropping and resizing images it is also possible to select predefined sizes from the **Preset** list, defined by the system administrator in the **web.config** file of your website.

Inserting embedded media

You can insert embedded media into your web pages, such as video or Flash animations. Just as with images, the embedded media must be available on the **Media** tab to be able to link to the media file as described in *Managing media*. The most common file formats are supported on the EPiServer CMS sample site. For a detailed description of other formats such as Quicktime, Windows Media and Real Media, please refer to available accessibility coding standards.

> Depending which type of media you select on the **General** tab, the attribute options will vary on the **Advanced** tab. For a more detailed description of Flash movie attributes, please refer to available accessibility coding standards.

Insert embedded media as follows:

1. Place the cursor in the editor area where you want to insert your image.
2. Click the **Insert/edit embedded media image** button on the editor toolbar.
3. In **Type**, select the type of media and associated format, for instance Flash, Quicktime or Windows Media. Flash is selected by default.
4. In **File/URL**, browse to select the media file in the File Manager.
5. In **Dimensions**, set the dimensions of the movie in pixels. Ensure that **Constrain properties** is selected to keep the proportions of the movie.
6. Click **Insert** and the media will be linked into the page.

Advanced settings

By selecting the **Advanced** tab, you can work with advanced media settings (background color, alignment and options for the display of media) as follows:

Advanced options

1. In **ID**, you can set a unique identifier for the media. The ID can be referenced by CSS style sheets or by a JavaScript providing additional functionality.
2. In **Align**, position the display of the media on the page.
3. In **Background**, select a background color for the media by using the following options: **Picker**, **Palette** or **Named**.
   Click **Apply** to apply the background.
4. In **V-Space** and **H-Space**, enter the horizontal and vertical space in pixels to surrounding objects.
5. Click **Update** to save your changes.

Flash options

1. In **Quality**, set the quality for the Flash movie to display. Specifies how to prioritize playback speed and appearance.
2. In **Scale**, set the scale to specify how the movie should adapt when displayed in a specified area.
3. In **WMode**, set the Window Mode property of the Flash movie for transparency, layering, and positioning in the browser.
4. In **SAlign**, specify how the movie should align in the browser window.
5. Selecting **Auto play** will make the movie to be played automatically when the page is opened.
6. Selecting **Loop** will make the movie to repeat indefinitely or stop when it reaches the last frame.
7. Selecting **Show menu** will make the menu to be displayed.
8. Selecting **SWLiveConnect** will make the browser to start Java when loading the Flash Player for the first time.
9. In **Base** , specify a base directory or URL used to resolve all relative path statements in the Flash Player movie. This attribute is helpful when your movies are kept in a different directory from your other files.
10. In **Flashvars**, set the root level variables to be sent to the movie.
11. Click **Update** to save your changes.

Managing versions

EPiServer allows you to work with version management. A page or a block that has previously been published and then changed, will be saved as a new version. When you are working on a page or a block, you might want to see its version status. Managing versions give you the opportunity to access and republish older versions and more.

If there are several editors working on the same content, you will work with a shared draft by default, meaning that your changes are saved in the same version, see *Editing a shared draft version*. You can also create a new version.

You can see and manage page versions in the following ways:

Content status on the toolbar

When you are editing content in full width, you will see status information in full text on the toolbar as shown in the following examples:

The symbol of the pen means that the content is not available for editing until you cancel the settings, for example, a scheduled publishing.

When the navigation pane and assets pane are pinned, the toolbar shows the following status symbols of the content:

A page or a block that has been published will be in **Published Version** status and no status symbol is shown.

A page or a block that has been set to **Ready to Publish** will be in **Ready to Publish** status.

A new page or a block that has not yet been published or set to ready to publish, will be in **Not Ready** status.

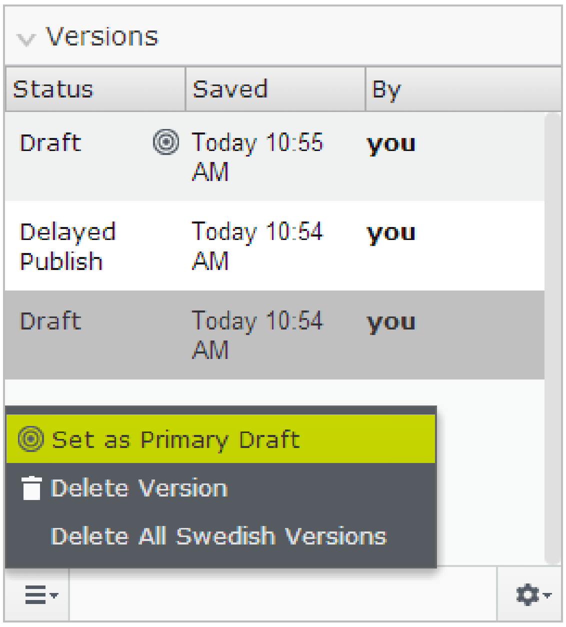
A published page or a block that has been changed but not yet published, will be in **Not Ready** status. It could also has been set to **Ready to Publish**, if it was not approved it will be in **Rejected** status.

A page or a block that has been scheduled for publishing:

- New will be in **Published** status
- Changed will be in **Delayed Publish** status

Versions gadget

You can see a list of versions for pages or blocks and manage them from the **Versions** gadget, where you also can manage language versions.



A page can have the following status in the version list:

- **Published Version** is the most recently published page version and displayed to the visitors
- **Previously Published** is a page version that was published before the latest published page
- **Not Ready** is a saved page draft but not yet published
- **Ready to Publish** is a page waiting to be published by anyone with access rights
- **Rejected** is a rejected page draft that has been replaced by the **Published Version**
- **Delayed publish** is a page that is set to be published at a certain time

Tip Clicking **Options** > **View on website** will take you to view the current published page as your visitors see it.

The number of versions stored for a page is controlled by a systems setting done by the system administrator.

Editing a shared draft version

If you are several editors working with a page, you will automatically work on a shared draft by default. You can create new page versions, and you can choose one of these page versions for all to continue working with by selecting **Set as Primary Draft**.

The shared draft has the symbol .

When you schedule publishing for pages and blocks, you have an option to create a new draft version. Select **Options** > **New Draft from Here**, and the new draft version opens for editing.

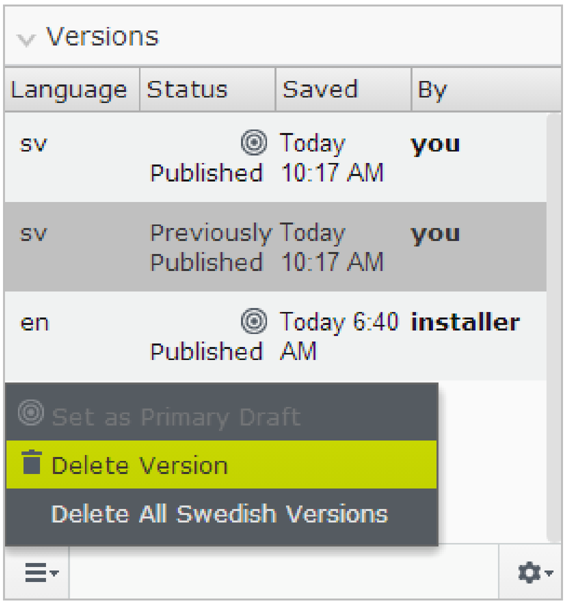
Tip You can schedule several versions of pages and blocks for publishing, for example, in a scenario of managing multiple campaigns and scheduling multiple banner adverts on a landing page. Use **New Draft from Here** to create another version for scheduling.

Editing a version

Select the content version you want to edit from the version list, and make your changes as described in *Working in edit view*.

Deleting a version

You can delete a single version of content you do not want to keep by selecting **Delete Version** from the context menu. Confirm the deletion. Note that this action cannot be undone.



Tip If you do not want it to be possible to delete older page versions in the version list, the delete access rights can be disabled from admin view.

Note You cannot delete a published page version, as well as you cannot delete a recently created page in a unpublished version.

Republishing content

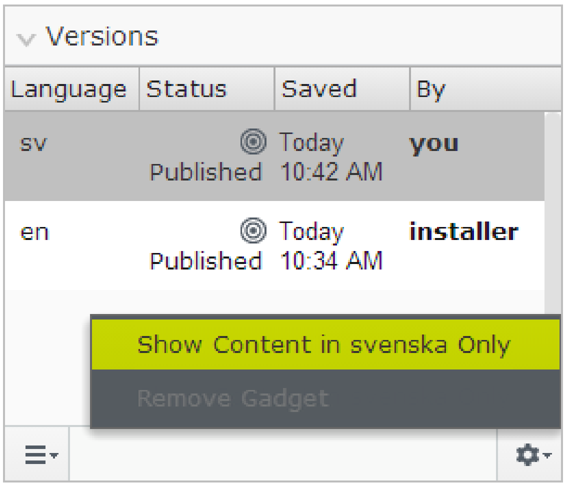
When you republish a page that has been published before, for traceability reasons a new version of that page will be created even if no actual changes has been made to the page.

The republished page will get a new timestamp under **Saved** in the version list.

Managing language versions

You can see a list of versions for pages or blocks and manage them from the **Versions** gadget, where you also can manage language versions.

By default all language versions are displayed with a language code in the version list. If you only want to see the versions for a particular language you have selected under the **Sites** tab, select **Show Content in [language] Only** from the **Versions** gadget.



Tip Clicking any of the header columns in the **Versions** gadget makes it possible for you to sort versions in ascending or descending order, by status, language and more.

Personalizing content

EPiServer CMS has a feature called **Personalization**, which is a way to adapt the content on your website to particular groups of your audience. As an editor you can design information on your website to suit a specific visitor group (market segment).

To target your content you simply select any content on a page – a block with a banner, an image, a text, or a shared block – and select which groups that are to be allowed to see it.

You can show different content on the front page to returning versus new visitors. Target easy links to your products for potential customers, or, present the address of the sales office closest to the visitors from one country.

You can watch videos about the personalization feature on *YouTube*.

Creating personalized content work procedure

Create personalized content in the following steps:

1. The system administrator creates visitor groups. Also the administrator can set up access rights for a visitor group to a page and its files.
2. The editor selects the content to personalize, and selects visitor group. Previews the personalized content, publishes or continues to work with the personalized content. Personalize content on a page with any of the following options:

- *Using the content area*
- *Using the rich-text editor*

3. The system administrator can enable statistics when creating the visitor group, so that the editor can add the *Visitor Group Statistics gadget* to follow how many visitors have visited a page with personalized content.

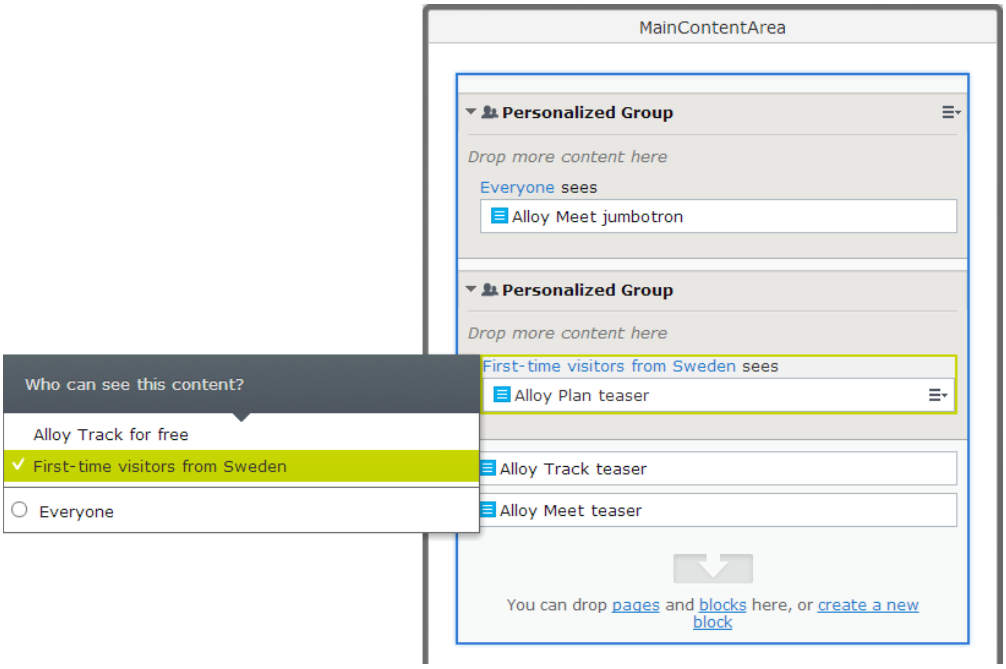
Personalizing content using the content area

Select the content you want to personalize and select one or several visitor groups.

Personalizing a block

Personalize a block as follows:

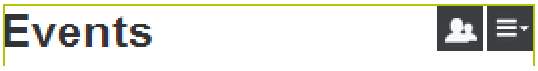
1. Create and drag the block to a page as described in *Assets – Using shared content on a page*.
2. Select the block you want to personalize, and select **Personalize** from the context menu.



3. Select one or several visitor groups. You have the following options:
   - **[Visitor group name]** means that the content will only be shown for these visitor groups you have selected. It means that the content will be hidden from all other visitors who do not match the criteria. If you have several blocks that match a visitor group, only the first matching block will be shown.
   - **Everyone** means that the content will be shown to all visitors (and all visitor groups). Place this block last in the list of personalized content as fallback content for the visitors who do not match any of the criteria.
4. You can group blocks to be seen by a specific visitor group by dragging and dropping them into that area. Place the blocks in the list of personalized content in a suitable order to achieve desired results. Example:
   Place the block for **Visitors from Sweden** as first, **Visitors from Europe** as second, and **Everyone** as the last.

5. *Preview* the content as a visitor group.
6. Publish.

All blocks with personalized content has the following icon next to the block options:



Note Personalization of a block only affects it on that particular page where it is used.

Removing personalization

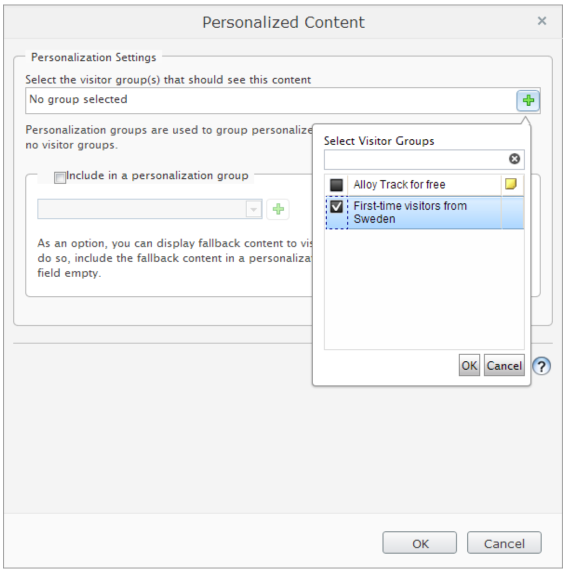
In the flyout pane > **Personalized Group** section, drag the content you want to remove personalization to outside the personalized group section. Or, select the context menu > **Move Outside Group**.

Personalizing content using the rich-text editor

Select the piece of content in the rich-text editor you want to personalize for one or several visitor groups.

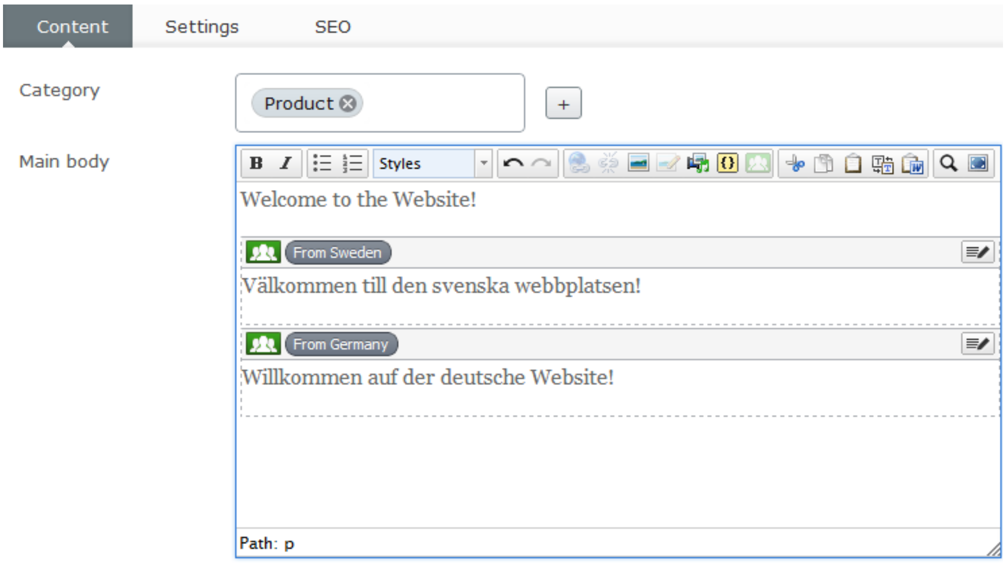
Personalizing a page

1. Open the page that you want to contain the personalized content.
2. Select the content you want to personalize, and click the **Personalized Content** button on the editor toolbar.
3. In the **Personalized Content** window and **Personalization Settings** section, click **+** to select one or several visitor groups from the list and click **OK**.



4. If you do not need any fallback content for visitors who do not match any visitor group, you can leave the **Include in a personalization group** blank. If you need fallback content, see *Grouping visitor groups*.
5. Click **OK** again. The personalized content is displayed as a box in the editor area. Note that the names of the included visitor groups are shown to the left. You can move and copy the per-

sonalized content boxes in the rich-text editor area just as you can do with any other objects.



6. *Preview* the content as a visitor group.
7. Publish.

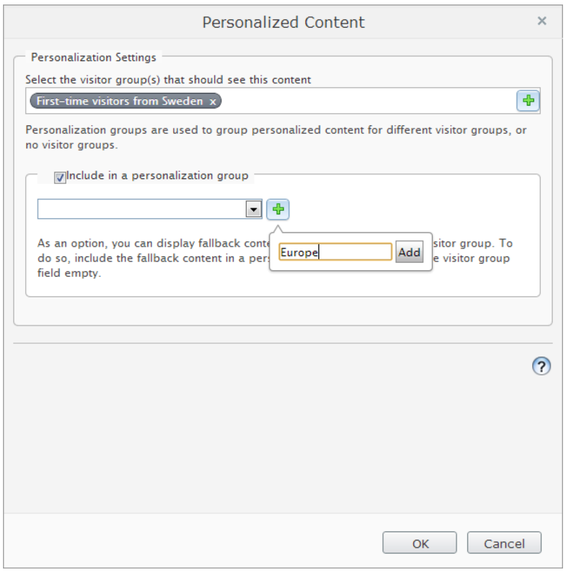
Grouping visitor groups

If you have several visitor groups, it is possible that some individuals also are members of several visitor groups. Or, you want to show the same content to several visitor groups. To make sure that your personalized content on a page is only shown once for these, you can group your visitor groups to be treated as one. You may also need fallback content for the visitors who do not match any visitor group. Then only the personalized content on the first matching visitor group will be shown.

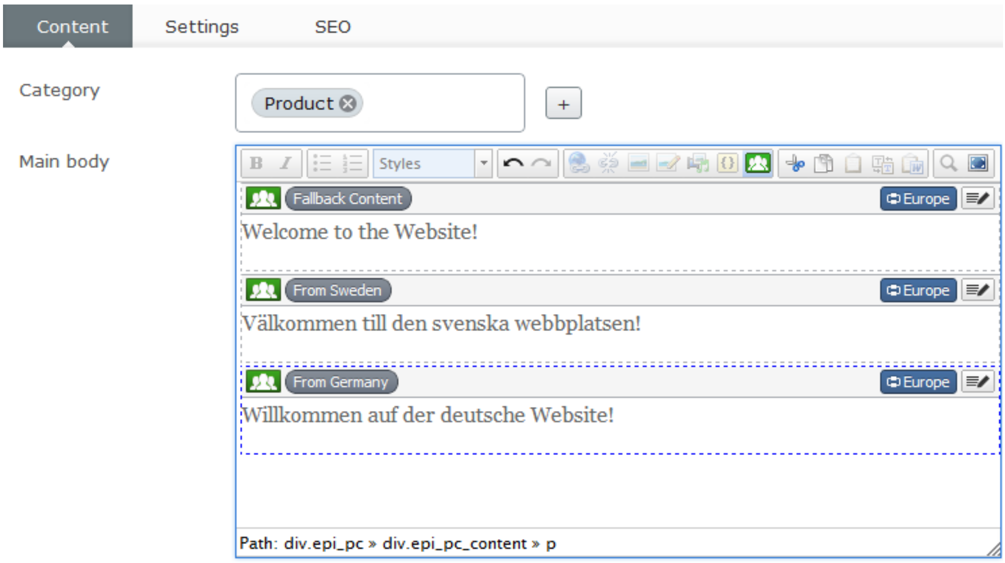
Example: Your organization wants to adapt content for visitors from Sweden and Germany, and also a piece of content to be shown by default if the visitor does not match any visitor group. If you want the content for all these visitor groups to be shown only once, you can group them by adding the personalization group “Europe” as follows:

1. Open the page and select the content you want to personalize for the visitor groups from Sweden and Germany, by following points 1–5 of the instruction in *Adding personalized content*.
2. Select the personalization group from the list to apply to the visitor groups that you have selected. To add a new personalization group, click **+**, name it and click **Add**.
3. Select the content for the visitors who do not match any visitor group by selecting the **Include in a personalization group** check box and keeping **Fallback content** selected (with no other visitor group selected). Select the personalization group from the list to apply to the fallback content, or

add a new personalization group.



4. Click **OK** again. The personalized content is displayed as a personalization markup box in the editor area. Note that the names of the included visitor groups are shown to the left and the personalization group to the right.



5. *Preview* the content as a visitor group.
6. Publish.

Changing personalized content

Changing personalized content means that you can add or remove visitor groups and content groups. When you have opened the page containing the personalized content box, you can change it in the following ways:

Changing through the personalized content button

1. Click the **Edit personalized content** toolbar button .
2. Make your changes to the personalized content and click **OK**.

3. Publish.

Changing through the personalization markup box

1. Select the personalization markup box, and click the **Personalized content** button.
2. Make your changes to the personalized content and click **OK**.
3. Publish.

> ***Note*** Cut and copy for a personalized content box in the editor area may work differently depending on the browser you use. You may have to use either the cut and copy buttons of the editor toolbar, or the right-click cut and copy of your browser, instead of the keyboard keys. If you have trouble placing the cursor immediately before or after a personalized content box in the editor, try using the keyboard arrow keys instead of the mouse.

Removing personalized content

You have the following options to remove personalization from a page:

Removing personalization from a block

Remove personalization from a block as follows:

1. Select the block you want to remove personalization from, and select the block options menu and **Personalize**.
2. Change to **Everyone**. Clear the check mark from one or several visitor groups?

> ***Note*** This action affects only the block on that particular page where it is used.

Removing personalization from a page in the rich-text editor

Remove personalization from a page in the rich-text editor as follows:

1. Click the **Edit personalized content** button in the personalization markup box that you want to delete.
2. Click the **Remove Personalization** button. The content will on the page
3. Publish.

> ***Tip*** You can remove both personalization markup and the content within it on the page by selecting the personalization markup box in the rich-text editor and pressing **Delete** on your keyboard.

Personalizing content using access rights

Consider this feature as advanced usage.

The system administrator can apply access rights on an entire page to be shown for selected visitor groups.

Administering visitor groups

EPiServer CMS has a feature called **Personalization**, which is a way to adapt the content on your website to particular groups of your audience, also called visitor groups. A visitor group is a virtual group. As an administrator you can design the visitor groups used for personalized content on your website. You can also provide access for editors to become members of **VisitorGroupAdmins**.

You define the expected audience on your site by dragging and dropping various criteria to a visitor group you are creating, for example, “Competitors”, “Potential customers”, “People from Sweden”, “Potential employees”. In EPiServer CMS a lot of the basic criteria are provided out-of-the-box, for example, a geographic location criteria, number of visits, referring search word, and more. But you can also develop your own criteria.

When creating a new visitor group the administrator selects one or more criteria and sets appropriate settings for them. Those criteria will be used to determine if a user visiting the website is a part of that visitor group or not.

Available visitor group criteria

On the EPiServer CMS sample site the following set of criteria are available:

- **Site Criteria**
  - **Number of Visits** will match the number of times the visitor has visited the website.
  - **User Profile** will match a value stored in a user’s profile. When adding this criterion you can specify that to be part of this group the user has to have a specific value for a specific profile setting. You can decide if the user profile property should match on equal, contain, start with, or end with a specified value.
  - **Visited Category** lets you select one of the page categories on the website. You can also select how many different pages that use the specified category the visitors have visited. The visitor must have visited the specified number of pages that has the specified category set on it.
  - **Visited Page** will let you select one specific page on the website. The visitor must have visited the specified page during the current session.
- **Time and Place Criteria**
  - **Geographic Coordinate** will look up the visitor’s approximate location in a geolocation database (based on the visitor’s IP address). Drag the marker and drop it on the map (Google Maps), and select a radius around that point to match the visitors location to the selected location.
  - **Geographic Location** will look up the visitor's approximate location in a geolocation database (based on the visitor’s IP address) and match their location to the selected location. You can match the visitor to a specific continent, country and region. It is also possible to specify a wild card for country and region.
  - **Time of Day** will match the visitors time period with the start time, end time, and weekdays you have specified.
- **URL Criteria**
  - **Landing URL** will store the URL that the user enters the site with. You can decide if the landing URL should match on equal, contain, start with, or end with a specified value.
  - **Referrer** will store the URL of the referred page that was clicked before entering the site, for example, the URL of a search engine result page. You can decide if the referrer criteria should match on equal, contain, start with, or end with a specified value for the whole URL or parts of it.
  - **Search Keyword** will store the URL of the referred page that was clicked before entering the site, for example, the URL of a search engine result page. This criteria can be defined by your partner developer to specify the search word to match against the URL by a

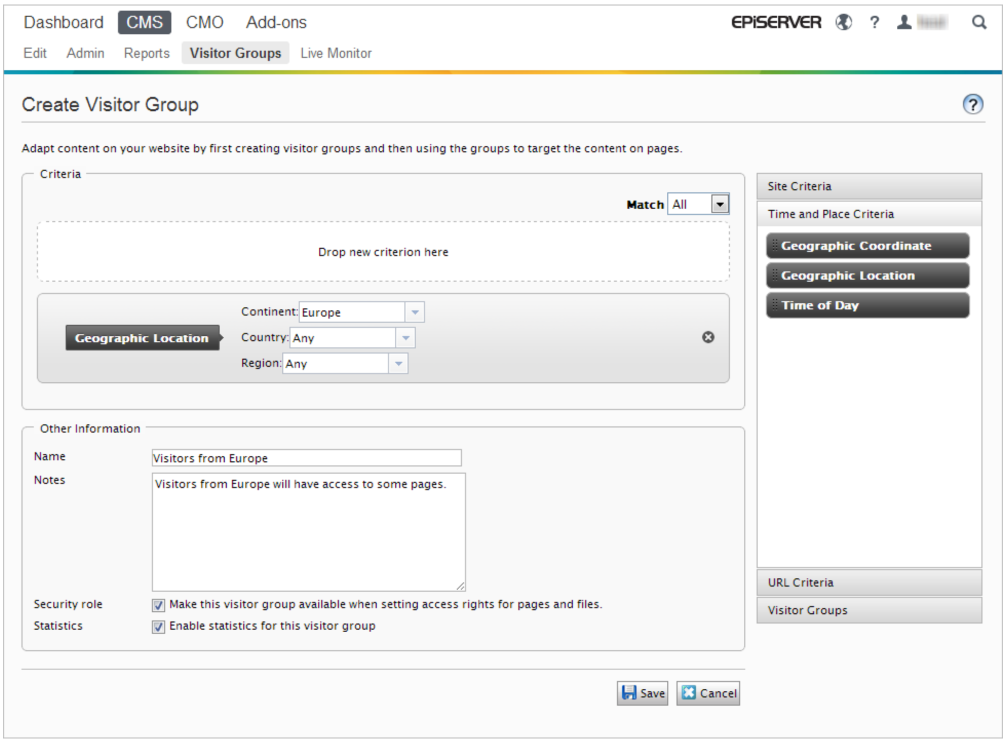
regular expression. The regular expression then finds the search words in the URL from the most common search engines on the market, for example Google, Yahoo, and Bing.

- **Visitor Groups**
  - **Visitor Group Membership** let you select members from one or several existing visitor groups.

Creating a visitor group

Add a visitor group to be available for personalized content as follows:

1. Log in to EPiServer CMS and select the **Visitor Groups** tab. Or, you can right-click and select **Visitor Groups** instead.
2. Click **Create**.



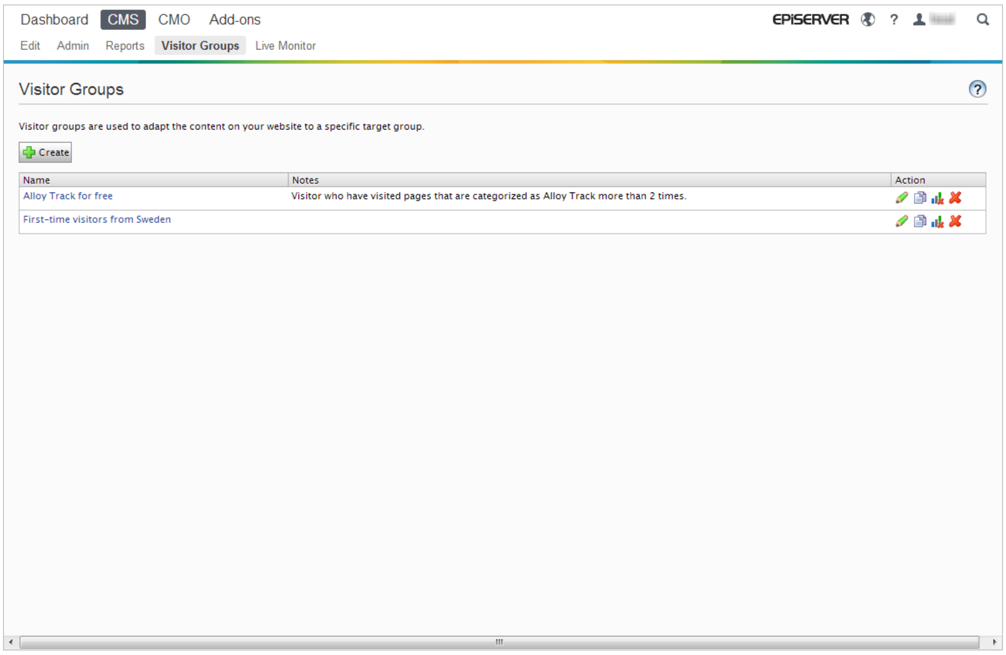
3. In the **Criteria** section, click to add one or several criteria for each visitor group as follows:
   a. In the **Match** drop-down list, select the criteria to match **All**, **Any** or **Point**. What you select here will affect all criteria for the visitor group. Using points is a way to set a value for what an desired action on the website is worth.
   b. Drag the criteria you want from the pane on the right and drop it into the **Drop new criterion here** area.
4. Make the settings for the criteria, see examples described in *Examples of creating visitor groups*.
5. In **Name**, name the visitor group you have created. This name will be displayed in the personalized content box when you select the content on a page.
6. In **Notes**, type a descriptive text about the visitor group you have created, for example, its purpose. This description will be displayed as a tooltip when the editor is adding a visitor group to the content on a page.
7. In **Security Role**, select the check box if you want this visitor group to be available when setting access rights for pages and files in admin mode. Note that visitor groups will only have read access.

8. In **Statistics**, keep the check box selected to enable statistics for the visitor group (this check box is selected by default).
9. When you are done, click **Save**.

Changing a visitor group

Change a visitor group as follows:

1. Select the **Visitor Group** tab.



2. Click the **Edit** button for the visitor group you want to change.
3. Add new criteria for the visitor group by drag-and-drop, change the value for an existing criteria, or click to delete an existing criteria.
4. When you are done, click **Save**.

Note If you change the name of a visitor group available in the list for access rights, the settings for this visitor group will no longer work.

Copying a visitor group

Copy a visitor group as follows:

1. Select the **Visitor Group** tab.
2. Click the **Copy** button for the visitor group you want to copy. The new copy will have the same name as the original but with the extension “- Copy”.
3. Rename and change criteria for the new visitor group you have copied.

Deleting a visitor group

Delete a visitor group as follows:

1. Select the **Visitor Group** tab.
2. Click the **Delete** button for the visitor group you want to delete.
3. Confirm the deletion.

Viewing and clearing statistics

The visitor group statistics are shown as a gadget on the dashboard. Clear the statistics from the database as follows:

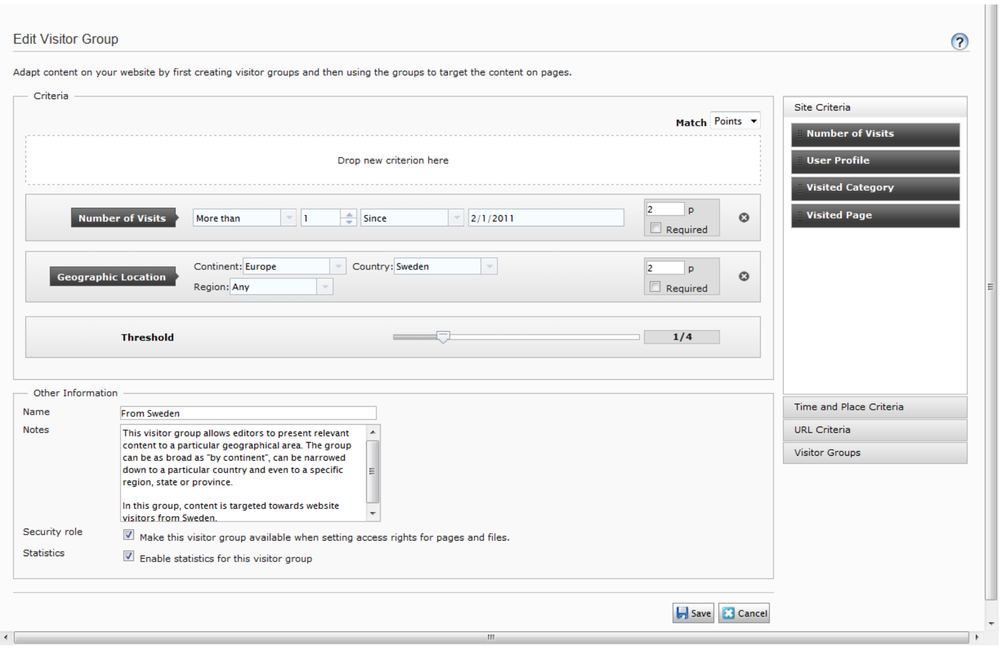
1. Select the **Visitor Group** tab.
2. Click the **Clear statistics** button .
3. Confirm the deletion.

> ***Note*** The clear statistics action takes effect immediately, and are permanently deleted from the database. This action cannot be undone.

Examples of creating visitor groups

This section provides the following examples on how you can define the visitor groups by combining different criteria:

Site criteria and points



By using **Points** you can set a value for how much an action is worth, for example, a visited campaign page. In this example, visitors who has visited the page before from a certain date will match the criteria for this visitor group.

1. In the **Match** drop-down list, select the criteria to match **Point**.
2. Drag and drop the **Visited Page** criterion, and select page. Use drag-and-drop of the criteria again to add several pages.
3. Drag and drop the **Number of Visits** criterion, and select **More than** > **1** > **Since [date]**. To create a visitor group for visitors who never has visited the page before, select instead **Less than** > **1** > **Since [date]**.
4. Enter the number of points each criterion is worth, and select whether the criterion is required or not.
5. Select **Threshold** for the criteria you have added in your visitor group, for example, that the visitor

must fulfill 1 of 3 criteria to be included in the visitor group.

6. Save the visitor group.

Geographic Location

You can direct your content to visitors from a specific country and specific days, for example, “People from Sweden” visiting your website weekends. For example, you can show all Swedish people a clickable banner to sign up for a conference.

1. Drag and drop the **Geographic Location** criteria, and select **Continent**, **Country** and/or **Region**. Use drag-and-drop of the criteria again to add several countries.
2. Drag and drop the **Time of Day** criteria, and select **[weekday]**. You can also select the personalization to start and end at a specific time.
3. Save the visitor group.

Geographic Coordinate

You can direct your content to visitors from a specific part in the city, for example, “People from Upplandsgatan, Stockholm”.

1. Drag and drop the **Geographic Coordinate** criteria, and click **Select Location**.
2. Select location by clicking the map you want to include in the geographic coordinate and click **OK**.
3. Select the **Radius [number of kilometers or miles]**.
4. Save the visitor group.

Referrer

The HTTP Referrers is based on pages, for example, used in a campaign. For example, you can target the content for visitors searching for “episerver and cms” on Google.com and clicking the link to EPiServer’s landing page from the search engine result page.

1. Drag and drop the **Referrer** criteria, and select **URL** > **Equals** > the URL of the search engine result page, for example, http://www.google.se/#hl=sv&source=hp&biw=1338&bih=790&q=episerver+cms.
2. You can also add the **Geographic Location** to select a specific country.
3. Save the visitor group.

Commerce-specific criteria

The EPiServer Commerce sample site features a number of predefined visitor group criteria customized for an e-commerce site where you want to *personalize content* based on products and order information. *Visitor groups* can be applied to the various content on your e-commerce site, creating a personalized website 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. 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 Commerce-specific personalization criteria are described in more detail in the following.

> Note that in order to create visitor groups, you will need *administrator access*. Editors will only be able to apply existing visitor groups to content, not create them.

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.

Market criteria

With the **Market** criteria you can personalize content based on the *market* a visitor to the website belongs to.

Personalize content based on the following information (select from drop-down list):

- **Market** - select a market from the drop-down list. Available markets are defined under *Market Management*.

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**.