



# **BEA AquaLogic Commerce Services**

## **Commerce Manager User Guide**

Version 5.1  
February 2007

## **Copyright**

Copyright © 1995-2007 BEA Systems, Inc. All Rights Reserved.

## **Restricted Rights Legend**

This software is protected by copyright, and may be protected by patent laws. No copying or other use of this software is permitted unless you have entered into a license agreement with BEA authorizing such use. This document is protected by copyright and may not be copied photocopied, reproduced, translated, or reduced to any electronic medium or machine readable form, in whole or in part, without prior consent, in writing, from BEA Systems, Inc.

Information in this document is subject to change without notice and does not represent a commitment on the part of BEA Systems.  
THE DOCUMENTATION IS PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND INCLUDING WITHOUT  
LIMITATION, ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. FURTHER, BEA  
SYSTEMS DOES NOT WARRANT, GUARANTEE, OR MAKE ANY REPRESENTATIONS REGARDING THE USE, OR THE  
RESULTS OF THE USE, OF THE DOCUMENT IN TERMS OF CORRECTNESS, ACCURACY, RELIABILITY, OR  
OTHERWISE.

## **Trademarks and Service Marks**

Copyright © 1995-2006 BEA Systems, Inc. All Rights Reserved. BEA, BEA JRockit, BEA WebLogic Portal, BEA WebLogic Server, BEA WebLogic Workshop, Built on BEA, Jolt, JoltBeans, SteelThread, Top End, Tuxedo, and WebLogic are registered trademarks of BEA Systems, Inc. BEA AquaLogic, BEA AquaLogic Data Services Platform, BEA AquaLogic Enterprise Security, BEA AquaLogic Interaction, BEA AquaLogic Interaction Analytics, BEA AquaLogic Interaction Collaboration, BEA AquaLogic Interaction Content Services, BEA AquaLogic Interaction Data Services, BEA AquaLogic Interaction Integration Services, BEA AquaLogic Interaction Process, BEA AquaLogic Interaction Publisher, BEA AquaLogic Interaction Studio, BEA AquaLogic Service Bus, BEA AquaLogic Service Registry, BEA Builder, BEA Campaign Manager for WebLogic, BEA eLink, BEA Kodo, BEA Liquid Data for WebLogic, BEA Manager, BEA MessageQ, BEA Salt, BEA WebLogic Commerce Server, BEA AquaLogic Commerce Services, BEA WebLogic Communications Platform, BEA WebLogic Enterprise, BEA WebLogic Enterprise Platform, BEA WebLogic Enterprise Security, BEA WebLogic Express, BEA WebLogic Integration, BEA WebLogic Java Adapter for Mainframe, BEA WebLogic JDriver, BEA WebLogic Log Central, BEA WebLogic Mobility Server, BEA WebLogic Network Gatekeeper, BEA WebLogic Personalization Server, BEA WebLogic Personal Messaging API, BEA WebLogic Platform, BEA WebLogic Portlets for Groupware Integration, BEA WebLogic Real Time, BEA WebLogic RFID Compliance Express, BEA WebLogic RFID Edge Server, BEA WebLogic RFID Enterprise Server, BEA WebLogic Server Process Edition, BEA WebLogic SIP Server, BEA WebLogic WorkGroup Edition, BEA Workshop for WebLogic Platform, BEA Workshop JSP, BEA Workshop ISP Editor, BEA Workshop Struts, BEA Workshop Studio, Dev2Dev, Liquid Computing, and Think Liquid are trademarks of BEA Systems, Inc. Accelerated Knowledge Transfer, AKT, BEA Mission Critical Support, BEA Mission Critical Support Continuum, and BEA SOA Self Assessment are service marks of BEA Systems, Inc.

All other names and marks are property of their respective owners.

# Contents

<b>Overview .....</b>	<b>1</b>
<b>System Requirements .....</b>	<b>1</b>
<b>Getting Started .....</b>	<b>1</b>
Step 1: Signing in to the AquaLogic Commerce Services Commerce Manager .....	1
Step 2: Configuring your store.....	2
Step 3: Loading existing data.....	2
<b>Fulfillment .....</b>	<b>2</b>
Searching for an Order.....	2
Viewing Order Details.....	3
Editing Order Status .....	3
Editing Billing Address.....	3
Releasing a Shipment .....	3
Creating a Return .....	4
Capturing Funds for Credit Card Payment.....	4
<b>Customer .....</b>	<b>4</b>
Adding a Customer.....	4
Searching for a Customer .....	5
Modifying a Customer .....	5
Delete a Customer .....	5
<b>Product Catalog .....</b>	<b>5</b>
Opening the Catalog Manager .....	6
Opening the catalog manager.....	6
Browsing Catalog .....	6
Selecting a category.....	6
Opening tree nodes.....	6
Collapsing tree nodes .....	7
<b>Searching Catalog.....</b>	<b>7</b>
Searching for categories .....	7
Searching for products .....	7
<b>Managing Categories.....</b>	<b>8</b>
Categories .....	8

Adding a Category.....	8
Deleting a category .....	9
Sorting categories .....	9
Viewing categories .....	9
Editing category.....	9
Managing Products .....	10
Adding a product.....	10
Deleting a product .....	10
View product.....	10
Editing products.....	10
Switching product language .....	10
Product Field Descriptions .....	11
Search Engine Optimization.....	13
Tiered Pricing .....	14
Product Merchandising Associations .....	15
Digital Goods.....	17
Product SKUs.....	17
Image Management .....	19
Selecting an asset.....	19
Uploading an asset .....	19
Creating a folder.....	19
Rename a folder.....	19
Rename an asset.....	19
Deleting a folder .....	20
Deleting an asset.....	20
<b>Inventory .....</b>	<b>20</b>
Adjust Inventory by SKU .....	20
Upload an Inventory file.....	21
<b>Promotions .....</b>	<b>21</b>
Shopping Cart Rules.....	22
Add a Shopping Cart Rule .....	22
Modify a Shopping Cart Rule .....	23
Delete a Shopping Cart Rule .....	24
Product Catalog Rules .....	24
Add a Product Catalog Rule.....	24
Modify a Product Catalog Rule .....	25
Delete a Product Catalog Rule.....	25

Promotion Tips .....	25
<b>Reporting .....</b>	<b>26</b>
Viewing/Saving Reports .....	27
<b>Administration.....</b>	<b>27</b>
Import .....	27
Format of import files .....	27
To run an import job .....	28
Shipping.....	28
Shipping Regions .....	28
Create a New Shipping Region.....	29
Edit an Existing Shipping Region .....	29
Delete a Shipping Region .....	29
Shipping Service Levels.....	29
Add a New Service Level .....	29
Modify an Existing Service Level .....	30
Delete a Service Level .....	30
User Config .....	30
User Roles.....	31
Users .....	31
Catalog .....	32
Attributes .....	32
Category Type.....	33
Product Type .....	33
SKU Options.....	33
Brands .....	33
Attributes .....	33
Category Type.....	34
Product Type .....	35
SKU Options.....	36
Brands .....	36
Taxes.....	37
Tax Codes.....	37
Tax Categories .....	37
Tax Jurisdictions.....	38
Tax Values .....	39
Customer Profiles .....	39
Add a Profile Attribute .....	39

Edit a Profile Attribute .....	39
Delete a Profile Attribute .....	40

# Overview

Welcome to the AquaLogic Commerce Services Commerce Manager.

This application is used to administer all aspects of your online store including:

- Store configuration
- Fulfillment
- Customer service
- Merchandising
- Inventory
- Promotions
- Reporting

# System Requirements

Users of the Commerce Manager should have the following minimum system requirements:

- 1.0 Ghz Intel or AMD CPU (or equivalent processor on Mac)
- 256 MB RAM
- 1024x768 screen resolution
- Browsers: [http://edocs.bea.com/alcs/docs51/pdf/supportedconfigs\\_alcs.pdf](http://edocs.bea.com/alcs/docs51/pdf/supportedconfigs_alcs.pdf)
  - Javascript and cookies must be enabled
  - Pop-up blockers must be off

# Getting Started

After deploying your AquaLogic Commerce Services storefront and Commerce Manager applications (see Deployment Guide), it's time to start configuring your store!

The following steps will guide you through this process:

## Step 1: Signing in to the AquaLogic Commerce Services Commerce Manager

Sign into the Commerce Manager by accessing the URL that was setup during deployment.

## Fulfillment

- Username: admin
- Password: 111111

## Step 2: Configuring your store

Start configuring your store by specifying:

- Shipping options
- Users & permissions
- Catalog attributes, data types & brands
- Taxes

## Step 3: Loading existing data

If you have existing customer data or product catalog data, you can import it in CSV format including categories, products, SKUs, merchandising relationships, customers, addresses and more.

If you prefer to enter your product catalog data manually, you can use the product catalog manager.

### NOTES:

- It is common for store administrators to import basic product catalog data via the import manager tool and then enrich this data by adding additional content as well as merchandising relationships such as cross-sells and up-sells.
- Please note that there is a time delay between the time that a record (customer, order, category, product, or SKU) is created and the time that the record appears in search results. The delay is due to the fact that our search engine only adds new records to the search index at scheduled intervals (which are configured when setting up your store).

## Fulfillment

The Fulfillment tab of the AquaLogic Commerce Services Commerce Manager is where you complete your orders - change the shipping status, billing information, capture credit card payments and process returns.

## Searching for an Order

1. In the top left pane of the page, select your search filter:

- Order Number
- Customer Number
- Customer Email

- Customer First Name
    - Customer Last Name
2. Enter your search phrase in the text box
  3. Click "Search". The search results will be displayed in the "Search Results" pane.

The "Advanced Search" will give you additional search filters that can be used for a more fine-grained search

## Viewing Order Details

1. Search for the order you wish to view (see "Searching for an Order" above)
2. In the search results, click the "edit" icon (pencil). The details of the order should now be viewable in the main viewing pane.

## Editing Order Status

3. View the details of the order you wish to edit (see "Viewing Order Details" above)
4. In the "Order Details" pane, click the "Edit Order Status" button
5. Select the new status from the drop-down and click "Save"
  - Placed
  - On Hold
  - Rejected
  - Approved
  - Completed
  - Cancelled

## Editing Billing Address

1. View the details of the order you wish to edit (see "Viewing Order Details" above)
2. Click the "Edit" button next to "Billing Address" (top right pane)
3. Edit the fields as necessary and click the "Save" button

## Releasing a Shipment

1. View the details of the order you wish to edit (see "Viewing Order Details" above)
2. Click the "Release Shipment" button next to "Shipment Status" in the "Shipments Information" pane
3. Enter a "Shipment Tracking #" (required)
4. Optionally check off:
  - Send customer shipment confirmation:** This will send an email notification

- **Capture Funds:** This will invoke the credit card payment process

**Note:** Credit card payments can only be captured at the time the order is released for shipment. The current version of AquaLogic Commerce Services does not provide for capturing credit card payments at a later date.

## Creating a Return

1. Find the order you wish to return (see "Viewing Order Details" above)
2. Scroll down the page and click on the "Add Return" button next to the "Return" title
3. In the pop-up window, add an "RMA #", a "Return Reason", and optional comments
4. Click the "Save" button.
5. The details of the return will now be displayed in the "Returns" pane

**Note:** When a return is created, the current version of AquaLogic Commerce Services does not process a credit card refund.

## Capturing Funds for Credit Card Payment

Payments via credit card are captured during the process of "Releasing a Shipment" (see section above).

**Note:** Credit card payments can only be captured at the time the order is released for shipment. The current version of AquaLogic Commerce Services does not provide for capturing credit card payments at a later date.

## Customer

From the CSR tab in the AquaLogic Commerce Services Commerce Manager, you can manage the customer accounts stored in your AquaLogic Commerce Services database. You can search for, add, modify and delete customers.

**Note:** If your system is configured to authenticate against BEA Weblogic Server or Weblogic Portal, password changes, new account creation, and account deletion are not permitted within the Commerce Manager.

## Adding a Customer

1. On the left side of the page, under the "Tasks" heading, click the "+" symbol next to "Add Customer"
2. In the resulting pop-up, fill in the requested customer information
  - Required fields are marked with an asterisk
  - There are three levels of Customer Status:

- **Active:** The customer will be able to login to the storefront and purchase products
- **Disabled:** The customer will NOT be able to login to the storefront, hence they will not be able to purchase products
- **Pending Approval:** This status can be used for a workflow process. In terms of storefront functionality, it is the same as disabled.

3. Click OK to create the new customer.

## Searching for a Customer

1. On the left side of the page, under the "Search" heading, select your search filter from the drop-down (Customer Number, Email, First Name, or Last Name).
2. Fill in the text box with your search string
3. Click the "Go" button. Your search results will be displayed in the main display panel

## Modifying a Customer

1. Search for the customer (see "Searching for a Customer")
2. In the search results, click on the View icon (magnifying glass) next to the customer you wish to modify
3. At the top of the page, click on the Edit icon (pencil) and a pop-up will appear with customer's existing attributes populated in a form
4. Edit the attributes as desired
  - You can change the customer's password by clicking on the "Change Password" tab
5. Click OK to save your changes.

## Delete a Customer

1. Search for the customer (see "Searching for a Customer")
2. In the search results, click on the Delete icon (far right)
3. Confirm that you wish to delete this customer

## Product Catalog

From the Catalog tab of the AquaLogic Commerce Services Commerce Manager, you can add, remove and modify the products in your storefront. The building blocks of the AquaLogic Commerce Services catalog are Categories and Products. Understanding the relationships between these components will help you create and organize your content:

A category can contain zero or more products

A category can contain zero or more categories (sub-categories)

A product can belong to one or more categories

## Opening the Catalog Manager

The Catalog Manager allows you to add and remove products from your website content. The building blocks of AquaLogic Commerce Services are categories, products and product SKUs (formerly Product Variations in EP4 or earlier). Understanding the following relationships of these components will help you create and organize your content:

- A category can contain zero or more products.
- A category can contain zero or more categories (sub-categories).
- A product must contain one or more product SKUs in order for products to be ordered (by default a product automatically contains 1 sku).
- A product can belong to one or more categories.

### ***Opening the catalog manager***

1. Log in to the Commerce Manager homepage.
2. Select the "Catalog" tab near the top.

Some of the key catalog page components:

- a) Catalog Search - This area is used to do searches within the Catalog Categories or Products.
- b) Browse Catalog - This area contains a category navigation tree and several commonly used icons.
- c) Search Results - This area is used to show a) the Catalog Search results or b) the category contents selected from the Browse Catalog area.

## Browsing Catalog

Browsing the catalog is very much like navigating a Windows Explorer tree. It allows you to select and perform actions on the various categories (synonymous to folders in our Windows Explorer example) in the system.

### ***Selecting a category***

To select a category, simply click on the category branch text in the left bottom pane (this will also bring its product contents to the Search Results pane).

### ***Opening tree nodes***

Categories that **may** contain other sub-categories will have a plus sign besides them. When you click on the plus sign if there are any sub-categories in that category they will be revealed.

Clicking plus signs will not select the Categories besides them.

## ***Collapsing tree nodes***

Categories that contain other sub-categories will have a minus sign besides them. When you click on the minus sign the sub-categories in that category they will be concealed.

# **Searching Catalog**

If you know where a product or category resides in the tree hierarchy you should navigate using the tree in the bottom left pane, and using the column header sorting. However this may be difficult if you have many products and categories; the catalog search can help.

## **Searching for categories**

1. Within the Catalog Search pane, select Category in the Search Type drop down.
2. Enter the Category Name or portion of the name you wish to search for.
3. Choose either Exact Phrase or Matches Containing
4. Check Active if you want to include the categories visible in the storefront
5. Check Inactive if you want to include the Categories that are not visible in the storefront
6. Press the "Go" button to begin the search
7. The search results will appear in the right Search Results pane
8. (Optional) Use the column headers to sort the tabular results to find the desired category.
9. (Optional) Use the pagination icons at the bottom of the Search Results pane to find the desired category.

## **Searching for products**

1. Within the Catalog Search pane, select Product in the Search Type drop down.
2. Enter the Product Name or SKU Code you wish to search for.
3. Choose either Exact Phrase or Matches Containing
4. Check Active if you want to include the products visible in the storefront
5. Check Inactive if you want to include the products that are not visible in the storefront
6. Use the Filter by Brand drop down to narrow the Product Brands you wish to search for
7. Press the "Go" button to begin the search
8. The search results will appear in the right Search Results pane
9. (Optional) Use the column headers to sort the tabular results to find the desired product.
10. (Optional) Use the pagination icons at the bottom of the Search Results pane to find the desired product.

Note: Search does not accept wild characters or regular expressions at this time.

# Managing Categories

Categories are used to manage and group products and other sub-categories. They are useful to bring organization to your catalog.

## Categories

Categories are used to organize your catalog. They are synonymous to folders or containers that contain other categories or products. By default all Categories have the following fields:

**Category Code (required)** - unique identifier for a category.

**Category Name (required)** - Enter the name of your category. This is the default name that will appear in the menu on your public site for the default language. For an internationalized site, you will have to change the language specific names in various languages.

**Category Type (required)** - Defines the associated attributes associated with this category.

**Visible in Store** - Leaving this checkbox disabled will keep it hidden from the storefront. After you have successfully created products return to the category and enable it. This is a good habit to get into so that when you make changes to a live site, you never end up with empty categories. It can also be used to prepare content that is not ready for Production or to disable seasonal products.

**Enable Date (required)** - Specifying an **Enable Date** will make the category **Visible in Store** starting on that day. This is useful for preparing seasonal catalog.

**Disable Date** - Specifying an **Disable Date** will uncheck the category **Visible in Store** on that given day. This is useful for stopping seasonal catalog.

**Other** - Categories can contain other attributes which are determined by their Category Type

## Adding a Category

1. Select the parent category in the Browse Catalog tree.
2. Press the create category icon just below the Browse Catalog title.
3. The Create New Category Wizard (Step 1 or 2) window should popup.
4. Enter the appropriate values for the fields (see above).
5. Press the next button and fill out the additional category attributes.
6. Press the done button once complete.

**Note:** New categories should show up in the Storefront immediately, with the exception of top level categories (the ones that show up in the tabs in the Storefront). This is because the top level categories are cached for performance reasons. If you add a new top level category, it will not show up in the Storefront until AquaLogic Commerce Services is restarted. Since we don't

expect that your top level categories will change that frequently, we decided that the performance gains were worth it.

## **Deleting a category**

1. Select the target category you wish to delete in the Browse Catalog tree.
2. Press the delete category icon just below the Browse Catalog title.

## **Sorting categories**

1. Select the target category you wish to move in the Browse Catalog tree.
2. Press the up or down category icon just below the Browse Catalog title to adjust its location

## **Viewing categories**

1. Select the category to view in the Browse Catalog tree.
- or
1. Select the category in the Search Results pane after a category search (see Search Catalog).
2. Press the view category icon just below the Browse Catalog title.
3. System displays the Category information (in default store language, e.g. English) in 3 separate panes:
  - o Category Details
  - o Category Attributes
  - o Search Engine Optimization
4. (Optional) Switches display language drop down in upper right to desired viewing language e.g. French
5. (Optional) System displays Category information in new language.

## **Editing category**

- 1-5. View the category as described above (see View category)
6. Click the "Edit" button to the right of the Category Details pane in order to edit the Category Details.
7. Click the "Edit" button to the right of the Category SEO pane in order to edit the Category SEO fields.
8. Click the pencil icons besides Category Image or Category Description to edit those Category fields.

## Managing Products

Products represents goods or services your eCommerce store is trying to sell. The basic product functionality is described here, however further details or more advanced topics have their own pages.

### ***Adding a product***

1. Select the parent category in the Browse Catalog tree.
2. Press the create product icon just below the Browse Catalog title.
3. The Create New Product Wizard (Step 1 or 4) window should popup.
4. Enter the appropriate values for the fields (see above) for each screen.
5. Press the done button once complete

### ***Deleting a product***

1. Search or select the category that contains the product you wish to delete (see appropriate sections)
2. Find the product to delete in the Search Results right hand pane (see View Product for help finding the product)
3. Once found, press the delete product icon found on the right hand side of the product row.

### ***View product***

1. Search for the product or select the parent category that contains the product you wish to view (see Category management section). A summary view should appear in the Search Results pane.
2. Press the "view" icon on the left of the Search Results pane for the given product. System displays the product details information (in default store language, e.g. English) in several panes (described in field descriptions).
3. (Optional) Use the pagination icons at the bottom of the Search Results pane to find the desired product.
4. (Optional) Use the column headers to sort the tabular results to find the desired product.

### ***Editing products***

- 1-5. View the product as described above (see View product)
6. The attributes of each pane can be modified by pressing the "Edit" button in the upper right of each pane, or the individual attributes of the Category Assignment and Product Attributes panes can be modified inline by pressing the pencil icon.

### ***Switching product language***

While editing or viewing a product there are drop downs in the upper right corner to switch between the languages setup for a AquaLogic Commerce Services instance.

## **Product Field Descriptions**

This section describes the core fields of a Product. Product fields are divided into these main sections, each of which are described in further detail below (note that some sections are given even more detail in other areas of the User Manual):

- Product Details
- Product Pricing
- Category Assignment
- SKU, Inventory & Shipping (only for single sku products)
- Product SKU's (only for mutli-sku products)
- Product Image
- Search engine optimization (SEO)
- Product Attributes
- Merchandising

### **Product Details**

- **Product Code (required)** - unique identifier for a product within the AquaLogic Commerce Services system. Not typically displayed to storefront users.
- **Product Name (required)** - the name of your product. This is the default name that will appear in the menu on your public site for the default language. For an internationalized site, you will have to change the language specific names in various languages.
- **Product Type** - Defines the associated attributes associated with this category.
- **Tax Code / Category** - indicates or associates what tax codes to apply to this product.
- **Brand (required)** - the products Brand
- **Store Visible (required)** - Leaving this checkbox disabled will keep it hidden from the storefront. This visibility can be superceded by any parent category. For example checking product A as visible, but unchecking the containing category visibility to off, will not make this product visible (unless it is more than one category).
- **Enable Date (required)** - will make the product Store Visible (if it is not already) on the given date.
- **Disable Date** - will make the product Store Visible to unchecked (if it is not already) on the given date.
- **Min Order Quantity** - will not allow anyone to purchase less than this quantity per order.

### **Product Pricing**

Indicates the price tiers on this product. See Tiered pricing for further details.

## Category Assignment

These fields indicate what categories a product belongs to.

### SKU, Inventory & Shipping (only for single sku products)

- **SKU Code (required)** - unique identifier of product. Typically exposed to the storefront and possibly other external systems.
- **Shippable** - is the product physically shippable. This information can be used by integrated shipping systems like UPS to calculate shipping rates.
  - Shipping Weight (kg)
  - Shipping Width (cm)
  - Shipping Length (cm)
  - Shipping Height (cm)
- **Track Inventory** - indicates if the AquaLogic Commerce Services system should track this product's inventory
  - **On Hand Qty** - This is the total quantity of inventory that the system knows about.
  - **Reserved Qty** - This is the quantity of goods that are not available for sale on the website. For example, if there are 100 boxes of cigars as the On Hand quantity, and five as the Reserved Quantity, when inventory levels hit five, the product will show as out of stock on the website. Only 95 are available for sale.
  - **Reorder Qty** - This field will cause a low stock warning to appear on the Commerce Manager Homepage if inventory falls to this level.
  - **Visible When Out of Stock?** - When this is checked, this product will show on the storefront even if it is out of stock. However, it will not allow the product to be ordered, and it will display out of stock on the product detail page.
  - **Expected Restock Date** - displays to the storefront when
- **Digital Asset** - Digital goods are products which exist only in digital format such as e-books, digital photos, MP3 files, PDF reports and software downloads.
  - **File** - the associated file/digital asset for the product
  - **Download Limit** - the maximum amount of times a user can download the asset.
  - **Download Expiry** - the number of days after the order is placed that a user can download the asset.

## Product SKU's

This section is used to define multiple Product SKUs for a given product. In AquaLogic Commerce Services 4 this was termed Product Variations. See the Product SKUs section for further details.

## Product Image

Allows you to select the default image for the product. This image will be used to create thumbnails and other larger views of the product. Additional images can be specified in Product Attributes depending on template layout. Also see section Image management - the asset manager for further details.

## Search engine optimization (SEO)

SEO combines several features to gain a better website ranking within search engine ratings and increasing website importance with back-link optimization. These features consist of customizable values for use in the URL and customizable on-page values for title, meta-description and keywords. See Search Engine Optimization (SEO) for further details.

## Product Attributes

Attributes specific to the **Product Type** will be shown here (see Product Type and 4 - Catalog for further details).

## Merchandising

Merchandizing refers to the practice of displaying additional products on the screen while the user is browsing the site. This works by associating one product with other products the customer may be interested in (see Product merchandising associations for more details).

## **Search Engine Optimization**

Search Engine Optimization (SEO) combines several features to gain a better website ranking within search engine ratings and increasing website importance with back-link optimization. These features consist of customizable values for use in the URL and customizable on-page values for title, meta-description and keywords.

The SEO fields can be found in the catalog manager on the category and product detail pages. Although none of the fields are required, if URL and Title are left blank, the application will generate values automatically. This scenario ensures that if SEO is enabled, there are values that are available to be displayed on the Storefront.

If values are manually inserted for URL, the following rules apply:

- Values must be unique across all categories and products (if a URL is inserted that already exists in the catalog manager, the application will append the unique ID for that object to the end of the URL)
- Values must not contain spaces. A hyphen should be used instead
- Values must use lower case characters. This helps in consistency, usability and link-back optimization.

## SEO fields

- **URL** - this can be a complete or relative URL that will be associated with this page.
- **Title** - used by in page title meta tags to aid search engine optimization.
- **Key Words** - used by in page keyword meta tags to aid search engine optimization.
- **Description** - used by in page description meta tags to aid search engine optimization.

## Editing SEO values

1. View the category or product details (see appropriate managing section)
2. In the Search Engine Optimization (SEO) pane there is an "Edit" button on the right side, press it.
3. This should bring up a popup to allow you to edit the SEO values.
4. (Optional) use the Language drop down to change the SEO values for other languages.
5. Press the "Save" button when complete.

## **Tiered Pricing**

Tiered pricing allows you to assign volume discounts to individual products. This is particularly useful in a wholesale or e-procurement situation.

### Viewing a tiered price

1. Price tiers are visible on the product page in the Product Pricing pane.
2. (Optional) to see prices for other currencies, change the Currency drop down in the right corner.

### Adding a tiered price

1. Click the "Edit" button in the upper right of the Product Pricing pane.
2. An Edit Product Price window should appear.
3. Click the "Add Price Tier" button in the lower right.
4. Enter the quantity (Qty) at which your price tier starts.
5. Enter the List Price and/or Sale price which will be given when a purchase exceeds the entered quantity.
6. After the creation of a Price Tier, a new row will be created to facilitate creating multiple price tiers. Repeat steps 3 to 5 as necessary.
7. Delete the last empty Price Tier.
8. Click the "Save" button to complete.

### Deleting a tiered price

1. Click the "Edit" button in the upper right of the Product Pricing pane.
2. An Edit Product Price window should appear.

3. Click the "x" delete button beside the price tier you would like to delete.

## **Product Merchandising Associations**

Merchandising associations are proven to be an excellent way to increase the average order size from your ecommerce website. In AquaLogic Commerce Services they consist of the following five types:

1. **Cross Sell** - enables you to feature alternative products that are similar to the product the customer is currently viewing; it allows a store to present alternative purchasing options to the customer. For example, a customer adds a Canon camera to their cart, cross-selling may suggest similar Camera's by other manufacturers e.g. a Panasonic or Minola camera. Store merchandisers often use this feature to drive sales of higher margin products, or products which are overstocked.
2. **Up Sell** - enables you to feature upgrades to certain products; it encourages your customers to buy more expensive models. For example, a customer adds an Acme 200 camera to their cart, should be encouraged to instead purchase an Acme 300 or Acme 400 (however not the Acme 100 - a cheaper model).
3. **Warranty** - enables you to sell 'add-on' products such as extended service plans. For example when selling a Digital Camera you can offer a 2 year extended warranty for an additional \$29.99. Warranty products are usually 'source product dependant' hence they can only be sold with a product.
4. **Accessories** - enables you to feature certain products alongside other complementary products; it encourage buyers to buy more and hence increase the average transaction amount of a sale. For example, a customer adds a camera to their cart, they should be encouraged to also purchase a 512meg memory card, carry case, batteries, and a zoom lens.
5. **Replacement** - enables you to show replacement goods in the case that a model has been discontinued. For example the Canon SD300 is replaced by the SD310 model. Although you no longer have any remaining stock for the SD300 model you want to leave the product visible in the store and hence prevent dead links from search engines or price comparison sites. When customers looking for the SD300 come to the store, you can recommend the replacement model the SD310; thus create a successful conversion.

Each merchandising association has the following fields:

- **Product Name** - the associate product
- **Merchandizing Type** - select the appropriate type (see above)
- **Default Quantity (required)** - enter the amount of items of this associate product to add to the cart. For example when selling a digital camera you may decide to offer batteries as an accessory association, however the camera requires two AA batteries. Setting the default quantity to 2 will add two AA batteries to the cart when the customer decides to add the camera and the battery accessory.
- **Enable Date (required)** - when this association should become active.
- **Disable Date** - when we should no longer associate this product.

- **Requires source product in cart** - indicates that this associate product must be purchased along with the target product. If the target product is removed, so will the associated merchandise. An example would be a product warranty; there is no point buying a camera warranty without the camera.

## Adding a merchandising association

1. In the Merchandizing Associations pane near the bottom of the product page, press the create merchandising association button.
2. The Add Merchandizing Item popup window should appear.
3. Find the product you wish to associate by a) searching by product name or code or b) browsing the category tree.
4. Select the associated product in the right pane
5. Fill out the desired merchandising association fields (see above)
6. Click the Save button. The new merchandising association should show up in the merchandising association tree under the appropriate Merchandizing Type.

## Deleting a merchandising association

1. In the Merchandizing Associations pane near the bottom of the product page, select the merchandising association you wish to delete in the merchandising association tree.
2. Press the Delete merchandising association button.
3. Confirm the deletion dialog to complete deletion.

## Viewing/Edit a merchandising association

1. In the Merchandizing Associations pane near the bottom of the product page, select the merchandising association you wish to view in the merchandising association tree.
2. Press the View merchandising association button.
3. A popup of the merchandising association details should display.
4. If editing, modify the fields and press the "Save" button to confirm changes.  
Note: if you wish to change the associated product you must delete and add a new merchandising association.

## Moving a merchandising association up/down

Merchandising associations that appear first in the merchandising association tree have higher priority and are intended to show up first in the storefront. Priority can be changed by:

1. select the merchandising association you want to move up or down in the merchandising association tree.
2. press the move merchandising association up or move merchandising association down button to change the priority until it is in the desired position (higher in the tree typically means higher priority).

## Digital Goods

Digital goods are products which exist only in digital format such as e-books, MP3 files, PDF reports and software downloads.

Consider this example to illustrate how this works. Assume a digital audio product you are selling needs to be available in MP3 and WAV format. You want customers who purchase this product to be able to download the product in either file format once they have completed their order. In addition, you want to ensure authorized access to your digital goods so that renegade customers cannot simply copy and paste the file link to a public message board.

To create a digital asset simply press the "Edit" button on the "SKU, Inventory, Shipping Information & Digital Asset" product pane and fill out the Digital Asset fields (see Product field descriptions for Digital Asset fields).

Digital goods will appear in the storefront Order Receipt and the customers order history details.

## Product SKUs

Product SKUs are specific versions of a product. Each product can have one or more product SKUs in order to allow purchase. When multi-SKU is disabled the concept of a SKU doesn't exist - to the Commerce Manager the product and SKU are the same thing.

When a product type has multiple skus enabled, then a product can have multiple skus, BUT only combinations as defined in the product type. For example, if a product type of mens shirts has multi-sku set to true, and has sku options color, size and neck size. It may have 3 colors, 4 sizes, and 2 neck sizes, then up to 24 different SKU's can be created to cover all the available combinations.

## Product SKU fields

- **SKU Details**
  - **Enable Date** - what date does this SKU become visible in the storefront.
  - **Disable Date** - what date should this SKU be disabled in the storefront.
  - The remaining fields are the same as described in the 1 - Product field descriptions "SKU, Inventory & Shipping" section
- **SKU Pricing** - Indicates the price tiers on this product SKU. See Tiered pricing for further details.
- **SKU Image** - Allows you to select the default image for the product SKU. This image will be used to create thumbnails and other larger views of the particular product SKU. Additional images can be specified in Product Attributes depending on template layout. Also see Image management - the asset manager for further details.
- **SKU Attributes** - Attributes specific to the SKU Option will be shown here (see SKU Options and Catalog for further details).

## Viewing a product SKU

1. View the parent product (see Managing products).
2. If the product is a multi-sku product it should have a "Product SKU's" pane.
3. Click on the link "View Product SKU's »".
4. The right pane should change to view a product SKU summary table.
5. To view further details of a particular SKU press on the view icon for that SKU column.

## Adding a product SKU

1. Follow the same steps as "Viewing a product SKU" (above), however click on the add icon instead.
2. A "Create New SKU Wizard (Step 1 or 2)" popup should appear.
3. Fill out the values as described above in the Product SKU fields.
4. Press the "next" button
5. Fill out the Product SKU attributes as appropriate.
6. Press the "done" button to complete adding the new SKU.

## Deleting a product SKU

1. View the parent product (see Managing products).
2. If the product is multi-sku product it should have a "Product SKU's" pane.
3. Click on the link "View Product SKU's »".
4. The right pane should change to view a product SKU summary table.
5. Press the delete icon on the right hand column.
6. Confirm the deletion in the dialog.

## Editing a product SKU

1. Follow the same steps as "Viewing a product SKU" (above).
2. Click the "Edit" button on the upper right of the **SKU Details**, **SKU Pricing** or **SKU Image** pane or modify the values in-line for the **SKU Attributes** pane.

## Navigating back to the Product / Product SKU Table

1. To navigate back to the Product SKU table from a Product SKU details, click the link "<< Return to Product SKUs" in the upper right.
2. To navigate back to the Product, click the link "<< Return to ..." in the upper right.

## Configuring a product for multiple SKUs

To configure a product for multiple SKUs, its configuration must have multiple skus enabled. See the Catalog section, specifically Product Type.

# Image Management

The asset manager is used to organize assets (such as images and digital goods) within the AquaLogic Commerce Services system. Typically images are associated with Categories, Products and Product SKUs while digital assets are associated with products or product SKUs. Assets are viewed by looking at a Categories, Products and Product SKUs attributes; pressing the Edit button will bring asset manager for that object.

## **Selecting an asset**

1. Use the left tree in the Folders pane to navigate the directory structure to find the containing directory/folder where your asset resides.
2. Select an asset in the middle Files pane, if possible the preview will appear in the right Select Asset pane (usually for images).
3. If this is the asset you want to select for this Categories, Products and Product SKU attribute press the save button in the bottom right.

## **Uploading an asset**

1. Use the left tree in the Folders pane to navigate the directory structure to find the parent directory/folder where your new asset will reside.
2. Press the Create Asset button in the upper left. The right pane should indicate Create New Asset.
3. Press the "Browse..." button to select your new asset from your local hard drive.
4. Press the upload button to complete the creation of your new asset.

## **Creating a folder**

1. Use the left tree in the Folders pane to navigate the directory structure to find the parent directory/folder where your new folder will reside.
2. Press the Create Folder button in the upper left. The right pane should indicate Create Folder.
3. Type in your new folder name.
4. Press the ok button to complete the creation of your new folder.

## **Rename a folder**

1. Use the left tree in the Folders pane to navigate the directory structure to find the directory/folder you wish to rename.
2. Press the rename folder / asset button in the upper left. The right pane should indicate Rename Folder/Asset.
3. Type in your new folder name.
4. Click OK to complete the renaming of your folder.

## **Rename an asset**

1. Use the left tree in the Folders pane to navigate the directory structure to find the asset you wish to rename.

## Inventory

2. Select the asset in the middle Files pane.
3. Press the rename folder / asset button in the upper left. The right pane should indicate Rename Folder/Asset.
4. Type in your new asset name.
5. Click OK to complete the renaming of your asset.

### ***Deleting a folder***

1. Use the left tree in the Folders pane to navigate the directory structure to find the directory/folder you wish to delete.
2. Press the delete folder / asset button in the upper left. The right pane should indicate Delete Folder/Asset; the pane contents should ask you to verify the folder deletion.
3. Click OK to complete the deletion of your folder.

### ***Deleting an asset***

1. Use the left tree in the Folders pane to navigate the directory structure to find the asset you wish to delete.
2. Select the asset in the middle Files pane.
3. Press the delete folder / asset button in the upper left. The right pane should indicate Delete Folder/Asset; the pane contents should ask you to verify the asset deletion.
4. Click OK to complete the deletion of your asset.

## Inventory

Adjusting the inventory levels in your store is handled through the "Warehouse" tab of the AquaLogic Commerce Services Commerce Manager. You can adjust (add or remove) your inventory levels on an individual SKU basis, or you can upload (add only) to the inventory levels of multiple products all at once by uploading an inventory file.

**Note:** You will not be able to adjust the inventory levels on products that have "infinite inventory" i.e. products whose inventory is not tracked. To set whether or not inventory is tracked for a particular product, see "SKU, Inventory & Shipping" under Product Field Descriptions.

### **Adjust Inventory by SKU**

1. Click the "edit" icon (pencil) next to "Adjust Inventory" in the "Inventory" pane on the left side of the page under the "Warehouse" tab
2. Select whether you are adding or removing inventory
3. Enter the SKU Code of the item for which you are adjusting the inventory level
4. Enter a quantity
5. Optionally, enter some comments
6. Click the "Adjust" button

**Notes:**

- You will not be able to remove inventory in an amount greater than is currently available
- You can view the current inventory level of a given product through the "Catalog" tab
- You can run a "Low Stock Report" through the "Reports" tab

## Upload an Inventory file

1. Click the "Warehouse" tab
2. Click the "edit" icon (pencil) next to "Upload Inventory" in the "Inventory" pane on the left side of the page
3. Type in the path to your new inventory file, or click the "browse" button and browse to the new file
4. Optionally, add comments to the upload
5. Click "Verify File" to start the upload

When verifying the file, several types of errors could occur:

- The file is not in a valid format (see "Format of the Upload File" below)
- The file contains invalid SKUs
- The file contains SKUs that have "Track Inventory" disabled (see "SKU, Inventory & Shipping" under Product Field Descriptions)

### Format of the Upload File:

- The supplied csv file should be comma separated and have two columns:
  - Column1 = SKU Code
  - Column2 = Quantity to Upload (this amount will be **added** to the current inventory level)
- The csv file should NOT have a header row
- You cannot use negative numbers for the "Quantity to Upload". To decrease the inventory level of a product, you must use the "Adjust Inventory by SKU" method described in the first section of this page.

## Promotions

All of the Promotion Rules can be accessed by clicking on the "Promotion" tab in the AquaLogic Commerce Services Commerce Manager. There are two types of promotion rules - Shopping Cart and Product Catalog. Product Catalog rules apply everywhere on the site and will be visible while customers browse the catalog as well as during the checkout process. On the other hand, Shopping Cart Rules only apply to items once they have been added to the cart. Shopping Cart promotions will **not** be visible while your customers browse the catalog. Rules are created by

combining available eligibilities, conditions, and actions. Eligibilities define which customers are eligible to receive the promotion while conditions indicate when the promotion should be applied. Actions describe the discount to be applied if the eligibilities and conditons are met. The following are examples of rules that can be created.

- Everyone who enters the promotion code "smile" receives a 10% discount off their order
- Get 100% off every 2nd disposable camera in the shopping cart
- Buy an item from the Digital SLR category and recieve 100% off an item in the Carrying Case category
- If the cart subtotal is greater than \$100, give the customer free shipping on Ground shipping service
- All products in the Telescope category are 20% off until the end of the week

## Shopping Cart Rules

Shopping Cart Rules only apply once items have been added to the shopping cart. They will not be visible while the customer is browsing the catalog. As a simple example, a customer cannot see a "10% off" Shopping Cart Rule while browsing the catalog, but will see the discount when they view items in their cart. To display promotions in the catalog, see Product Catalog Rules.

### Add a Shopping Cart Rule

1. In the left pane, under the "Promotion Rules" heading, if the "Promotion Scenarios" list is not already expanded, click "+" to expand the list
2. Click "Shopping Cart" to highlight it
3. Click the "add" icon (plus symbol just under the "Shopping Cart" heading). The main window will now display the tools for creating your new rule
4. In the Rule Details pane:
  - Give your new rule a name (this is the only required field)
  - Specify the dates during which this rule applies (optional)
  - Give the rule a Promotion Code (optional): If you specify a promotion code, the rule will only be applied if the customer enters the promotion code during checkout.
5. Supply a Rule Definition:
  - For each rule, you must specify the Eligibility and the Action at a minimum
  - Click the Eligibility tab to view the available eligibilities. You must select at least one eligibility:
    - Click the "add" icon (plus symbol) next to each of the eligibilities that you wish to include in your rule
      - Everyone: The rule will apply to all customers
      - Registered Customers: The rule will be seen only by those customers who have logged into your storefront

- Customers belong to [] group: The rule will only apply to those customers who belong to the specified group. See "Customers: Manage Customer Groups" for instructions on creating customer groups
  - First time buyer: The rule will only apply to customers who have not purchased from your store before.
  - Click the Condition tab to add conditions to your rule. Conditions are optional:
    - Click the "add" icon (plus symbol) next to each of the conditions that you wish to apply to your rule
    - Currency is []: The rule will only apply to products listed in the currency of your choice
    - X Items of Category Y are in the shopping cart: For the rule to apply, your customer must have at least X number of items in Category Y in the cart. You can add exclusions to this condition.
    - X items of Product Y in cart: For the rule to apply, your customer must have at least X number of items of Product Y in their cart. You can add exclusions to this condition.
    - X items of SKU Y in cart: For the rule to apply, your customer must have at least X number of items with SKU Y in their cart.
    - Cart subtotal is at least \$ []: For the rule to apply, your customer must have a minimum total value in their cart.
  - Click the Action tab to add actions to your rule. You must select at least one action:
    - Click the "add" icon (plus symbol) next to each of the actions that you wish to include in your rule. The actions are quite straightforward:
      - Percentage discount, currency amount discount, or free item can be applied to items specified by:
      - Product, SKU, product category, or cart total
      - Percentage discount or currency amount discounts can also be applied to shipping service levels.
6. Click the "Save" button to save your new Shopping Cart Rule.

## ***Modify a Shopping Cart Rule***

1. On the left side of the page, under the "Shopping Cart" heading, click the name of the Shopping Cart Rule that you wish to modify. The details of the rule should now be visible in the main viewing area.
2. Make your edits and click the "Save" button to save your changes. Your rule must have at least one Eligibility and at least one Action. Conditions are optional. For a more detailed description of Eligibility, Conditions and Actions, see the previous section, "Add a Shopping Cart Rule".

## **Delete a Shopping Cart Rule**

1. Click the "delete" icon ("x" in a red box) to the next to the name of the rule you wish to delete.
2. Confirm that this is the rule you wish to delete.

# **Product Catalog Rules**

Unlike Shopping Cart Rules, Product Catalog Rules apply everywhere on your storefront. These promotions will be visible as your customers browse the catalog as well as when viewing the contents of their cart. When creating a Product Catalog Rule, the Condition tab is used to specify the products to which you would like the promotion rule to apply. The Action tab describes the discount action to be applied to products that match the criteria in the Conditions tab. This differs from Shopping Cart rules because actions in Shopping Cart rules specify the products that will be affected by the promotion.

## **Add a Product Catalog Rule**

1. Click the "add" icon (plus symbol) located just under the "Product Catalog" heading. The tools for building your new rule should now be visible in the main area.
2. In the Rule Details pane:
  - o Give your new rule a name (this is the only required field)
  - o Specify the dates during which this rule applies (optional)
3. Supply a Rule Definition:
  - o For each rule, you must specify the Eligibility and the Action at a minimum
  - o Click the Eligibility tab to view the available eligibilities. You must select at least one eligibility:
    - Click the "add" icon (plus symbol) next to each of the eligibilities that you wish to include in your rule
      - Everyone: The rule will apply to all customers
      - Registered Customers: The rule will be seen only by those customers who have logged into your storefront
      - Customers belong to [] group: The rule will only apply to those customers who belong to the specified group. See "Customers: Manage Customer Groups" for instructions on creating customer groups
      - First time buyer: The rule will only apply to customers who have not purchased from your store before.
  - o Click the Condition tab to add conditions to your rule. Conditions are optional:
    - Click the "add" icon (plus symbol) next to each of the conditions that you wish to apply to your rule
      - Currency is []: The rule will only apply to products listed in the currency of your choice

- Product is []: This rule will only apply to the specified product. You may also specify that the product **is not** the specified product. In this case the rule wil not apply to the selected product.
  - Product is in [] category: The rule will only apply to products that belong to the selected category. You may also specify that the category **is not** in the specified category. In this case the condition wil not apply to products in the selected category.
  - Brand is []: This rule will only apply to products with the selected brand. You may also specify that the brand **is not** the specified category. In this case the condition wil not apply to products with the selected brand.
- Click the Action tab to add actions to your rule. You must select at least one action:
    - Click the "add" icon (plus symbol) next to each of the actions that you wish to include in your rule
      - Discount of \$[]: A straight dollar discount is given. You can specify exclusions specified by SKU.
      - Discount of []%: A percentage discount is given. You can specify exclusions specified by SKU.
      - Discount of \$[] on SKU []: A dollar amount discount is given for the product specified by SKU
      - Discount of []% on SKU []: A percentage discount is given for the product specified by SKU
4. Click the "Save" button to save your new Shopping Cart Rule

### ***Modify a Product Catalog Rule***

1. On the left side of the page, under the "Product Catalog" heading, click the name of the Product Catalog Rule that you wish to modify. The details of the rule should now be visible in the main viewing area.
2. Make your edits and click the "Save" button to save your changes. Your rule must have at least one Eligibility and at least on Action. Conditions are optional. For a more detailed description of Eligibility, Conditions and Actions, see the previous section, "Add a Product Catalog Rule".

### ***Delete a Product Catalog Rule***

1. On the left side of the page, under the "Product Catalog" heading, click the "delete" icon ("x" in a red box) next to the name of the Product Catalog Rule that you wish to delete.
2. Confirm that this is the rule you wish to delete.

## **Promotion Tips**

- The more Promotion Rules that you create, the slower the performance of your storefront

## Reporting

- For **permanent discounts**, do not use the rules engine. Instead, create a sale price for products:
  1. Click on the "Catalog" tab
  2. Using the "Catalog Search" tool, locate the product for which you would like to create a Sale Price
  3. In the search results, click on the "view" icon (magnifying glass) to view the details of the product
  4. Click the "edit" button next to "Product Pricing"
  5. Enter a sale price. Customers will be able to see the original and discounted sale price in your storefront
- **Price Tiers:**
  - In order for your customer to receive the sale price, they must purchase the specified quantity
  - You can add multiple price tiers
- **Promotion Updates:** Promotion rules defined in the Commerce Manager will typically **not** take effect immediately in the Storefront. This is because rules and prices are cached in a standard deployment configuration to improve Storefront performance. The time required for rules to take effect will depend on this configuration. In the default configuration, changes to promotions may require up to one hour to take effect in the Storefront.
- **Condition and Eligibility Operators:** If a rule is not behaving as you expect, check that the condition operators are set to the right values. These operators can be set to "ANY" or "ALL." If the operator is set to "ANY" then the rule can fire if at least one of the eligibilities or conditions is present. If the operator is set to "ALL" then every condition or eligibility must be met.
- **Invalid Rules:** Note that it is possible to compose rules that will never be executed in the Storefront. For example, one could write a Catalog rule with one condition that says "Product is Camera X" and another condition that says "Product is Camera Y." If the condition operator is set to "AND" then this rule will never fire because it is not possible for an item to be both products at the same time.

# Reporting

From the Reports tab in the AquaLogic Commerce Services Commerce Manager, you can:

1. display reports in html format
2. download reports in pdf format
3. download report data in csv format

Report is csv format is meant to produce raw data that can be imported into your favorite spreadsheet application and as such does not include groupings and calculations that have been applied to the pdf and html reports.

## Viewing/Saving Reports

1. On the left side of the page, under the "Report" heading, select (click on) a report to display the report parameter page.
2. Fill in the report parameters (if any). Required parameters will be followed by a '\*'.
3. Click the action button of your choice ("Show HTML", "Save CSV", "Save PDF").
  - o For html: if there is more than one page page navigation buttons will appear at the bottom of the page.
  - o For csv/pdf: save report data to your computer, or open with an application of your choice.

## Administration

The Admin tab of the Commerce Manager gives you access to various tools to configure your installation of AquaLogic Commerce Services: Data Import, Shipping Regions and Service Levels, Users and User Roles, the various components of your Catalog (attributes, category types, product types, SKU options, and brands), and Taxes (codes, categories, jurisdictions and values).

## Import

The import tool can be used to import large amounts of product catalog data. For example, you can import types of data such as categories, products, or product associations.

### ***Format of import files***

- The CSV file can come from a variety of computing platforms (Linux/Unix, Windows, Mac OS). The Import wizard supports the different newline control characters which are used in the different platforms.
- Instead of the comma character, you can use another character to delimit your columns, e.g., |, the vertical bar.
- The first line in the CSV file must be a heading line that contains the column names, e.g., ID|first name|last name|email|password. These column names need not match the corresponding field names in the database.
- The heading line and the rest of the lines in the CSV file must have the same number of columns.
- Columns that contain the column delimiter character (e.g., the comma) or the line-break character must be enclosed in double quotation marks.
- If a column contains a double quotation mark, you must replace it with 2 double quotation marks.
- A Boolean column can contain the value 1 or true or y to mean True, and the value 0, or false, or n to mean False.
- A date column must be in the format "YYYY-MM-DD" where YYYY is the year, MM is the month, and DD is the day of the month. For example, 2006-06-15 refers to June 15, 2006.

## To run an import job

1. Choose if you want to create a new import job or re-use a previous one.
  - o Using a previous import job will skip you to Step 7
2. Choose the type of data you want to import such as categories, products, product associations, etc.
  - o If you have specific category and product fields you want to import beyond the standard fields, you will need to create corresponding category types and/or product types.
  - o Choose the file to upload
3. Choose column delimiter such as () and text qualifier such as ()
4. Preview the data from the CSV file you are about to import using the specified column delimiter and text qualifier
5. Select a "source field" from the left column, then a "destination field" from the right column, then click "Map" to map those 2 fields together
  - o You must map all of the **required** destination fields. You may map the **optional** destination fields if you choose to
  - o You can map a source column to more than 1 destination column. For example, you can map a name column to both name(English) and name(French) destination columns
  - o Not all source columns need to be mapped. All required destination columns must be mapped to source columns
  - o The Import wizard checks that all required columns are mapped, and that each mapped column is of the format that the database expects
6. Specify appropriate options for saving and/or executing the import job
7. A progress bar will show the import progress

## Shipping

The methods and costs of shipping available to your customers depends on the **region** they are shipping to, and the **service level** they choose.

The Shipping configuration you make here affect the "Shipping Estimator" that appears during checkout in your storefront.

### Shipping Regions

- You must set up Shipping Regions, otherwise your checkout process will not work.
- If your shipping service levels and shipping costs are the same for all addresses you ship to, then you can simply create one shipping region. Otherwise, if some service levels are only available in some regions or if the shipping cost calculations/fees vary between region then you will need to create multiple regions.

## **Create a New Shipping Region**

1. On the left side of the page, under the "Admin" heading, click on "Shipping" to highlight it
2. In the main viewing area, click the "Add Shipping Region" button at the top of the page
3. In the dialog box, give your new region a name (required)
4. Click and drag the countries/sub-countries you wish to include in this new Shipping Region from the left-side to the right
5. Click "OK" to save your new Shipping Region

## **Edit an Existing Shipping Region**

1. On the left side of the page, if the Shipping list is not already expanded, click "+" to expand the list
2. Click "Regions". The configured Shipping Regions should now be visible in the main viewing area
3. Click the "edit" icon (pencil) next to the region you want to modify
4. Add and/or remove the countries/sub-countries included in your Shipping Region by clicking and dragging from the left pane to the right and vice-versa
5. Click OK to save your changes

## **Delete a Shipping Region**

1. On the left side of the page, if the Shipping list is not already expanded, click "+" to expand the list
2. Click "Regions". Your configured Shipping Regions should now be visible in the main viewing area
3. On the far right, click the "delete" icon to delete the region
4. Confirm that you wish to delete the region

**Note:** You will not be able to delete a Shipping Region if there are Service Levels associated with it. You must first delete/dis-associate the Service Levels from the region (see next section)

## **Shipping Service Levels**

- On the "Shopping Cart" screen, there is a tax and shipping calculator. In order for a country to be listed in the "Country" picklist of this calculator, it must belong to at least one shipping service level.
- Shipping service levels cannot be deleted if they are being used in a promotion

## **Add a New Service Level**

1. On the left side of the page, if the "Shipping" list is not already expanded, click "+" to expand the list
2. Click "Service Levels". Your configured Service Levels should now be visible in the main viewing area
3. Click "Add Shipping Service Level" at the top of the page

4. From the drop-down, select the Shipping Region associated with this Shipping Service Level (see previous section, "Shipping Regions" for more information)
5. Select the carrier for this Shipping Service Level.
6. Give the Service Level a name
7. Choose a Calculation Method:
  - o Fixed Price: A single price is charged for all shipments within this Shipping Service Level
  - o Fixed Base and % of Total Order: A fixed base price is charged, plus a percentage of the total price of the order
8. Click OK to save your new Shipping Service Level

### ***Modify an Existing Service Level***

1. On the left side of the page, if the "Shipping" list is not already expanded, click "+" to expand the list
2. Click "Service Levels". Your configured Service Levels should now be visible in the main viewing area
3. Click the "edit" icon (pencil) next to the Shipping Level you wish to modify
4. Make your modifications and click "OK" to save the changes

### ***Delete a Service Level***

1. On the left side of the page, if the "Shipping" list is not already expanded, click "+" to expand the list
2. Click "Service Levels". Your configured Service Levels should now be visible in the main viewing area
3. On the far right, click the "delete" icon next to the Shipping Service Level that you want to delete
4. Confirm that this is the Service Level you want to delete
5. Shipping service levels cannot be deleted if they are being used in a promotion

### ***User Config***

The User Configuration section is where you assign your Commerce Manager users their roles and access privileges.

**User Roles:** Define what access privileges are granted i.e. which tabs are accessible in the Commerce Manager. Specifically:

- Fulfillment
- CSR
- Catalog
- Warehouse

- Promotion
- Reports
- Admin

**Users:** Create users with one or more of the roles you have defined.

## **User Roles**

### Create a User Role

1. Expand the "User Config" menu in the "Admin" pane
2. Click "User Roles"
3. Click the "Add User Role" button
4. Give the new role a name and an optional description
5. Check off each of the privileges that you want to grant to this role
6. Click the "Save" button

### Modify a User Role

1. Expand the "User Config" menu in the "Admin" pane
2. Click "User Roles"
3. In the "User Role Management" pane, click on the "edit" icon (pencil) next to the role you want to edit
4. In the dialog box, make your edits and click the "Save" button

### Delete a User Role

1. Expand the "User Config" menu in the "Admin" pane
2. Click "User Roles"
3. Click the "delete" icon (x in a red box) next to the role that you want to delete
4. Confirm that this is the role you wish to delete

Note: You will not be able to delete a User Role if it is being used by one of the users.

## **Users**

### Add a User

1. Expand the "User Config" menu in the "Admin" pane
2. Click "Users"
3. Click the "Add User" button in the "User Management" pane
4. In the dialog, under the "User" tab, you must provide:
  - User Name

## Administration

- Email
  - First Name
  - Last Name
  - Password
5. Check off whether this user is a Commerce Manager User, Web Services User, or both
  6. Under the "Roles" tab, select the desired roles for this user by dragging and dropping (see previous section for an explanation on creating roles)
  7. Click the "Save" button

## Modify a User

1. Expand the "User Config" menu in the "Admin" pane
2. Click "User"
3. Click the "edit" icon (pencil) next to the user you want to edit
4. In the dialog box, make your changes and click the "Save" button

## Delete a User

1. Expand the "User Config" menu in the "Admin" pane
2. Click "User"
3. Click the "delete" icon (x in a red box) next to the user you want to delete
4. Confirm the deletion

## Catalog

Products in your catalog are divided into **Category Types** and **Product Types**. Products are grouped into Categories. Different categories and products can have different attributes and can be displayed using different templates.

- example 1: A category called "Cameras" may have a different template from the "Accessories" category
- example 2: A "Digital Camera" product type may have attributes such as "Megapixels" and "Optical Zoom" whereas a "Clothing" product type may have attributes such as "Fabric" and "Washing instructions".

## Attributes

- Category Types and Product Types each contain a list of attributes which help differentiate them from other types
- When creating an attribute, check "Include in Search Index?" if you want the attribute to be searchable in the storefront

## **Category Type**

- The list of templates available is generated from the template files contained in: /webapps/ep5cm/WEB-INF/templates/velocity/catalog/category
- Choose attributes by dragging them from the "Available Attributes" list to the "Selected Attributes" list

## **Product Type**

- The list of templates available is generated from template files in: /webapps/ep5cm/WEB-INF/templates/velocity/catalog/product
- Choose attributes by dragging them from the "Available Attributes" list to the "Selected Attributes" list
- Choose the correct tax code for the product. This will determine which taxes apply to this particular product
- **SKU Configuration:** You can configure your products to have multiple SKU options (see below for a definition of SKUs).

## **SKU Options**

- SKU Options are used for creating multi-SKU products. For example, you could create a "Color" SKU if you offer the same digital camera in multiple colors

## **Brands**

- You can associate "Product Types" with the "Brands" that you configure here. See Managing Products for more information.

## **Attributes**

The attributes that you configure here are used to help you differentiate your Product and Category Types.

### **Add Attribute**

1. Click the "Add Attribute" button
2. In the dialog box, you must provide:
  - Attribute Key (must be unique)
  - Attribute Name
  - Attribute Usage (whether it is applicable to Category, Product or SKU)
  - Attribute Type:
    - Short Text
    - Long Text
    - Integer
    - Decimal

- Boolean
- Picklist
- Image
- File
- Date
- Date Time

3. Optionally, check off if this attribute is:

- Included in the Search Index
- Requires multi-language values
- a required attribute

4. Click "Save"

## Modify an Attribute

1. Click the "edit" icon (pencil) in the left column next to the attribute you wish to edit
2. Make your modifications and click the "Save" button

## Delete an Attribute

1. Click the "delete" icon (x in a red box) to the right of the attribute you wish to delete
2. Confirm that this is the attribute you want to delete

**Note:** You will not be able to delete the attribute if it is currently in use.

## Category Type

Categories are used to group the items in your catalog. Categories can contain products as well as other categories. For example, you could create a category called "Cameras". Within this category, you could create sub-categories "Digital Cameras" and "Single Use Cameras". Subsequently, within these two sub-categories, you would group your individual products. Create as many sub-categories as makes sense for your storefront. By defining the Category Types here, you associate various Attributes with your Categories.

## Add a Category Type

1. Click the "Add Category Type" button at the top of the "Category Types" pane
2. Give the Category Type a name (required)
3. Select the default template from the drop-down to be used for display in the storefront
4. Click and drag the desired attributes from the "Available Attributes" list on the left to the "Selected Attributes" list on the right
5. Click "Save"

## Modify a Category Type

1. Click the "edit" icon (pencil) next to the Category Type you wish to edit
2. Make your changes as desired
3. Click the "Save" button

## Delete a Category Type

1. Click the "delete" icon next to the Category Type you want to delete
2. Confirm that you wish to delete this Category Type

**Note:** You will not be able to delete a Category Type if it is in use

## **Product Type**

By configuring Product Types, you define the attributes associated with products as well as the default template used to display the product in the storefront, and whether this product is a multi-SKU item

**Multi-SKU:** You may have some products in your catalog that are basically the same product, with one differentiating factor. For example, the same digital camera, but in multiple colours. Or, different sizes of the same shirt.

## Add a Product Type

1. Click the "Add Product Type" button
2. Give the Product Type a name
3. Choose the default template used to display this Product Type in the storefront
4. Select the Tax Code that applies to this Product Type
5. Select the Attributes associated with this Product Type by clicking and dragging from the "Available Attributes" list on the left to the "Selected Attributes" list on the right
6. If this is a multi-SKU Product Type, click the "SKU Configuration" tab
  - o Check off the "Has Multiple SKUs?" checkbox
  - o Click and drag the desired SKU Options from the list of "Available SKU Options" to the list of "Selected SKU Options"
  - o Optionally click and drag individual SKU Attributes from the list of "Available SKU Attributes" to the list of "Selected SKU Attribute"
7. Click "Save"

## Modifying a Product Type

1. Click the "edit" icon (pencil) next to the Product Type you wish to edit
2. Make your changes as desired
3. Click the "Save" button

## Delete a Product Type

1. Click the "delete" icon (x in a red box) to the right of the Product Type you want to delete
2. Confirm that you want to delete this Product Type

**Note:** You will not be able to delete this Product Type if it is currently in use.

## ***SKU Options***

Use SKU Options for creating "Multi-SKU" Product Types. For example, you would create a "Size" SKU option to be used for clothing Product Types that come in several sizes.

### Add SKU Option

1. Click the "Add SKU Option" button at the top of the page
2. Give it a (unique) key
3. Give the SKU Option a name
4. Click "Save"

### Modify a SKU Option

1. Click the "edit" icon (pencil) next to the SKU option you wish to modify
2. Make your changes as necessary
3. Click the "Save" button

### Delete SKU Option

1. Click the "delete" icon (x in a red box) to the right of the SKU Option you want to delete
2. Confirm that this is the SKU Option you want to delete

**Note:** You will not be able to delete the SKU Option if it is currently in use.

## ***Brands***

The brands that you create here are used when configuring your product catalog.

### Add a Brand

1. Click the "Add Brand" button at the top of the page
2. Give the Brand a unique Brand Code and Brand Name
3. Optionally upload a Brand Image that can be used for display in the storefront
4. Click "Save"

### Modify a Brand

1. Click the "edit" icon (pencil) next to the Brand you want to modify

2. Make your changes as desired
3. Click the "Save" button

## Delete a Brand

1. Click the "delete" icon (x in a red box) to the right of the Brand you want to edit
2. Confirm that this is the Brand you want to delete

**Note:** You will not be able to delete the Brand if it is currently in use.

# Taxes

You only have to configure taxes for jurisdictions where there exists a "tax nexus" (jurisdictions where the state has the right to impose a tax on a potential taxpayer).

The building blocks for configuring taxes are Codes, Categories, Jurisdictions, and Values:

- **Tax Codes:** Tax Codes are a way to group your Tax Categories. Products have tax codes applied to them. The Tax Codes that you configure are what your customers see during the checkout process. For example: "Shipping" and "Goods" taxes.
- **Tax Categories:** Tax Categories determine the taxes that are applicable in each Tax Jurisdiction. For example, "GST" (the federal Goods and Services Tax), or "PST" (the Provincial Sales Tax).
- **Tax Jurisdictions:** Tax Jurisdictions are hierarchical, so it is possible to have different Tax Categories applied at various levels including country, sub-country, city or zip code
- **Tax Values:** The tax rate applied to the Tax Categories in each Jurisdiction

## Tax Codes

- To add a new Tax Code, click the "Add Tax Code" button. Give your tax code a name and click "OK" to save it.
- To delete an existing Tax Code, click on the "delete" icon (x in a red box) on the far right. You will not be able to delete the Tax Code if it has Tax Values associated to it

## Tax Categories

- To add a new Tax Category, click the "Add Tax Category" button at the top of the page. You will need to provide a name and a display name.
- To edit an existing Tax Category, click on the "edit" icon (pencil) next to the Tax Category of your choice
- To delete a Tax Category, click on the "delete" icon (x in a red box) on the far right of the page. You will not be able to delete the Tax Category if it has been associated with a Tax Jurisdiction.

## Tax Jurisdictions

The hierarchy in Tax Jurisdictions is first defined at the country level, followed by two levels of sub-country, and finally city or zip/postal code. To define Tax Jurisdictions:

1. Select a country from the drop-down list under "Add New Country" and click "add". Your country should now appear under "Existing Jurisdictions".
  - o The list of available Country jurisdictions is provided from the country.properties configuration file
2. Click your new country Jurisdiction to highlight it. On the far right, enter a sub-level name (or choose a sub-country from the drop-down if available) and click "Add"
  - o If a drop-down list of available sub-countries is available, it is provided from the subcountry.XX.properties configuration file
3. Click to highlight your new sub-level and add a second sub-level and choose an address match field (city, zip/postal code, or none).

## Applicable Tax Category

For each of your Tax Jurisdictions, check off the Tax Categories that apply. The applicable Tax Categories can be applied at any level of the Tax Jurisdiction.

## Calculation Method

- **Inclusive:** Prices in the catalog are displayed inclusive of taxes
- **Exclusive:** Prices in the catalog are displayed exclusive of taxes
- The Calculation Method can only be applied at the country level. The Calculation Method at sub-levels are inherited from the county they belong to.

## Tax Jurisdictions Hierarchy Examples

1. Say you have configured the a top level jurisdiction of Canada, with a sub-level consisting of all the provinces and territories. Since the GST (federal Goods and Services Tax) must be applied to all provinces and territories, but the PST (Provincial Sales Tax) only applies to certain provinces:
  - o At the top level of the hierarchy (Canada), check off "GST". This tax will now apply to this jurisdiction (Canada), including all sub-levels in the hierarchy (all provinces and territories)
  - o For each province and territory, check off the "PST" where applicable. For example, you would check off "PST" for "British Columbia", but not for "Alberta" where there is no provincial tax.
  - o You could also further define another sub-level representing, say, cities if you need to further refine your tax jurisdiction hierarchy
2. Say you only have to charge taxes in the state of California and nowhere else:
  - o Add the top level jurisdiction of "United States"

- Add a single sub-country of "California"
- Check off the tax category "State Sales Tax" (which you would have created earlier while configuring "Tax Category") and save your changes. Since you do not have to charge taxes for any other states, there is no reason to create any other sub-countries other than California.

## **Tax Values**

Once you have set up the appropriate tax codes, categories and jurisdictions, then you can specify tax values for each.

- To edit tax values, click on the value to edit, enter a new value, then press TAB or click off of the box to deselect the cell. Finally, click Save.

# **Customer Profiles**

Customer profiles allow you to control the types of information that are stored in the system that relate to your customers. Each piece of information is stored as a Profile Attribute. There are a number of Profile Attributes, called System Attributes, that come pre-configured in the system. Through the Customer Profile section of the Admin Tab, you can add/edit/delete your own Profile Attributes.

### **Add a Profile Attribute**

1. Click the "Add Attribute" button
2. In the dialog box, you must specify an Attribute Key, Attribute Name, and the Attribute Type. The Attribute Type can be one of:
  - Short Text
  - Integer
  - Decimal
  - Boolean
  - Date
  - Date Time
3. Specify if this attribute is required

### **Edit a Profile Attribute**

1. Click on the "edit" icon (pencil) next to the Profile Attribute that you wish to edit (System Attributes will not be editable)
2. In the dialog box, make your edits
3. Click the "save" button

### ***Delete a Profile Attribute***

1. Click the "delete" icon (red box with an "x") next to the Profile Attribute that you wish to delete. You will not be able to delete System Attributes, or Profile Attributes that a customer in the system is using.