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Merchandising Guide for Business Users

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ATG Merchandising Guide for Business Users

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1   Introduction

Oracle ATG Web Commerce Merchandising is a browser-based application that you use to create and manage catalogs, products, search facets, promotions, coupons, and pricing for one or more ATG-based commerce Web sites. You can perform the following activities in Merchandising:

- Set up catalogs and populate them with categories, products, and SKUs. You can create catalog assets directly in Merchandising or import them, for example, from a feed.

- Create promotions and coupons that allow you to offer discounts on specific products or groups of products.

- If your ATG environment includes ATG Search, you can use Merchandising to manage Search Merchandising features for your catalog, including facets, search configurations, and search tests.

Merchandising is installed as part of the ATG platform and is accessed from the Business Control Center.

About this Manual

This manual is intended for business users (merchandisers), who use Merchandising to create and maintain product catalogs for commerce Web sites. This guide provides overview topics to familiarize merchandisers with the features and concepts of the application and procedure topics that provide instructions for accomplishing merchandising tasks.

For information about installing and configuring Merchandising, see the *ATG Merchandising Administration Guide*.

For information about starting and logging into Merchandising, see the chapter

2   Working in Merchandising

This chapter describes how to log into Merchandising and provides an overview of the user interface. To learn how to perform specific Merchandising tasks, like creating and updating catalogs, products, and site content, see *Creating and Managing Assets* (page 27).

Accessing Merchandising

You access Merchandising through the Business Control Center. These instructions assume that the appropriate ATG products and databases are running and you have been assigned a login name and password. If you need a login or are unsure of your organization's ATG installation details, contact your administrator. If you are an administrator, refer to the *ATG Merchandising Administration Guide*.

Starting the Business Control Center

Your ATG products must be configured and running before you can access the Business Control Center. You must also configure a supported database. For more information, contact your administrator or see the *ATG Installation and Configuration Guide*.

1. Ensure your database and ATG applications have been started.

2. Point your Web browser to the server where the Business Control Center is running. The URL takes the following form:

   ```
   http://hostname:port/atg/bcc
   ```

   where `hostname` is the name of the server, and `port` is the number of the port which that server uses for the Business Control Center.

   ```
   http://anycorp.androcles:8080/atg/bcc
   ```

   If you are running the Business Control Center on a local machine, enter the following URL:

   ```
   http://localhost:port/atg/bcc
   ```

   The default port numbers for Oracle WebLogic, JBoss, and IBM WebSphere are 7001, 8080, and 9080 respectively. See the *ATG Installation and Configuration Guide* for details.

3. When the Business Control Center login dialog box appears, enter the login name and password defined in your ATG user profile. The fields are case sensitive.

The following image shows the Business Control Center Home page, which appears after you log in:
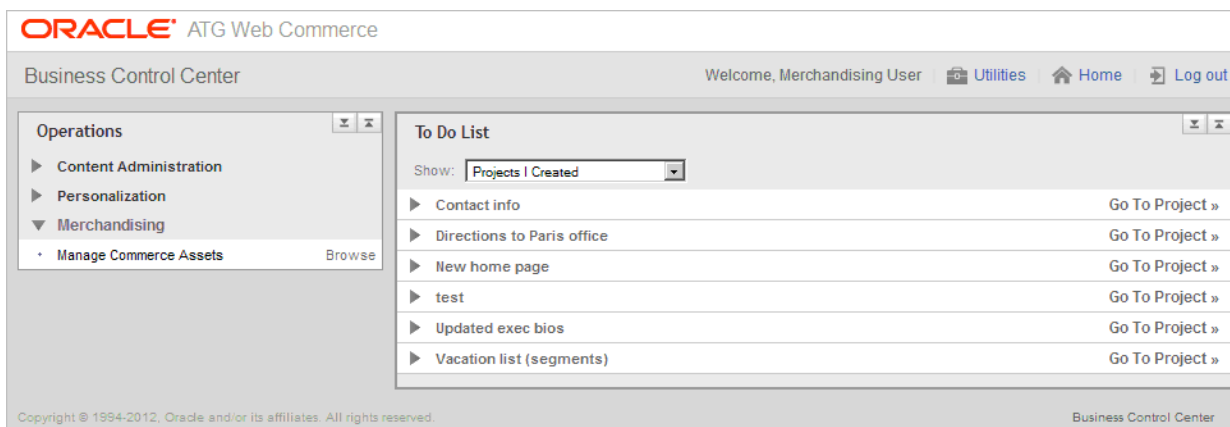
The Business Control Center Home page includes the following elements:

· The **Welcome** bar at the top shows the name of the logged-in user (the values of the first name and last name properties in the user profile).

· The **Utilities** menu contains a link to the ATG product documentation.

· The **Home** link returns you to this page from other parts of the Business Control Center.

· The **Log Out** link ends your Business Control Center session.

· The **To Do List** shows the ATG Content Administration projects that have been created in your system. For comprehensive information on using projects, refer to the *ATG Content Administration Guide for Business Users*.

· The **Operations** list contains the options you use to enter the editing interfaces for the ATG applications available to you. The options vary according to the following:

   · The options that your role has permission to use.

   · The ATG modules and applications that are running on the server.

Using the Operations List

The Operations list in the left pane contains the options you use to access Merchandising features. Click the Merchandising item to display the following options:

· Manage Commerce Assets: Select this option to create a new Merchandising project.

· Browse: Click this link to display Merchandising in read-only mode. In read-only mode, you can view commerce assets, but you cannot change or create them.

· Administer Commerce Search: This option is available if your ATG installation includes ATG Search. Select this option to create a new Search Merchandising project. Not all merchandisers see this option, as its availability depends on the permissions in your ATG profile.

For details on using the Content Administration menu item shown in the image, see the *ATG Content Administration Guide for Business Users*. For information on the Personalization menu item, see the *ATG Business Control Center User's Guide*. Additional options may appear in the Operations menu for other ATG applications. Refer to the documentation for those applications.

Using the To Do List

The To Do List in the right pane of the Business Control Center Home page allows you to view and edit projects that you have created or that contain tasks assigned to you. If you create a project through the Operations menu, but you do not complete it, you can use the To Do List to access it later for editing. For more information, see Using Merchandising Projects.
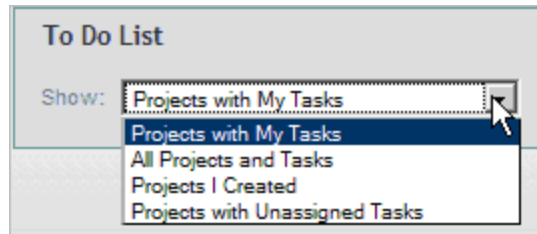
Using the Back Button in the Browser

ATG recommends that you avoid using your browser's Back button to navigate in Merchandising. Wherever possible, use the links and other navigation controls in the Business Control Center to move from one page to another. Depending on the operation you are performing, using the Back button to redisplay a page may occasionally cause data conflict, resulting in errors. If an error does appear after you click the Back button, close the browser and restart it.

Refreshing the Browser

ATG recommends that you not click your browser's Refresh or Reload button while working in Merchandising. Depending on the operation you are performing, refreshing your browser causes adverse results, including the loss of any unsaved changes.

Project Basics

Assets such as catalogs, product images, price lists, and SKUs that you work with in Merchandising must be published to your live sites along with any other items necessary for running the sites. These necessary items

include individual pieces of content, images, style sheets, and the Web pages themselves. The process of publishing assets from a development environment to a live site is managed by ATG Content Administration. The following are some key terms that you need to be familiar with when you work in Merchandising projects:

- **Project:** ATG Content Administration controls the lifecycle of items that are published to your Web sites through an entity called a project. A project contains a set of tasks that define the stages of the creation and publishing lifecycle. Typically, tasks include authoring, approval, and deployment. Tasks can be completed by different users. For example, the approval task could be completed by a supervisor, and the deployment task could be performed by a Web site administrator.

  Often, a project represents a logical grouping of items related to a particular business goal. For example, you could have a project called "Back to School" that contains all the items you need to create a microsite that highlights back-to-school products and promotions. Any number of items can be managed and deployed by a single project.

- **Asset:** In ATG Content Administration, any item that you create, edit, and deploy is referred to as an asset. Merchandising assets include catalogs, products, SKUs, promotions, and price lists. To learn how to work with commerce assets, see *Creating and Managing Assets* (page 27).

- **Versioning:** As well as managing the creation and deployment of assets, ATG Content Administration performs a type of source control, called versioning, on each asset. When you create an asset, the system gives it the number 1. When you or another user edits the asset, a second version is created, and versions 1 and 2 are both stored in the system. This behavior has two purposes: it prevents conflicts when two or more people edit the same asset, and it allows you to recover from errors by reverting to a previous version of an asset at any time. See Resolving Conflicts with Other Projects (page 10) for more information.

For detailed information on any of these terms, or for more information about versioning and deployment, refer to the *ATG Content Administration Guide for Business Users*.

Starting a New Project

Whenever you work on commerce assets in Merchandising, you begin by creating a project based on one of the available Merchandising project types in the Business Control Center. The type of project determines the workflow you use to perform project tasks and the assets and views that are available to you in Merchandising.

To start a new Merchandising project:

1. Start the Business Control Center.

2. In the Operations list, Click Merchandising, then click Manage Commerce Assets.

   This project type provides access to all parts of Merchandising used for creating, modifying, organizing, and deleting commerce assets, including Search Merchandising assets, if applicable.

3. Enter a name (up to 50 characters) and description for the project.

   It is a good idea to use a distinctive name so that you and other merchandisers can easily distinguish projects. Project names do not have to be unique, however. The description is optional but can be helpful if many projects have similar names.

4. Click Continue.

   Merchandising appears, with the Author task active. You can now start creating and editing assets, which automatically adds them to the project. See *Creating and Managing Assets* (page 27) to start working with your catalog.

Opening an Existing Project

If someone else created a project for you to work in, or if you did not finish all your work in one session, you can access an existing project using the To Do List.

To open an existing Merchandising project:

1. Start the Business Control Center.

2. Select a Show option from the To Do list:

   • **Projects with My Tasks** displays only projects with active tasks that are assigned to you. Projects you created appear in this list only if you are assigned to the current task.

   • **All Projects and Tasks** displays all active projects and shows the task that is currently active for each one.

   • **Projects I Created** displays all active projects that you created.

   • **Projects with Unassigned Tasks** displays active projects whose current task has not been assigned to anyone.

3. Click the project name to display the task name link, for example, Author. Click the task name.

   Merchandising appears, with the Author task active. You can now start creating and editing assets, which automatically adds them to the project. See *Creating and Managing Assets* (page 27) to start working with your catalog.

Adding Assets to a Project

Assets must be part of a project so that they can be versioned and deployed. Creating and editing assets in Merchandising automatically adds them to the current project. You can also manually add assets to a project in the Navigation pane or in an editable Preview session. For more information, see Navigation Toolbar (page 18) and *Working with Visual Merchandising* (page 49).

To see the assets that have been added to the current project, click the name of the project at the top of the Merchandising window.
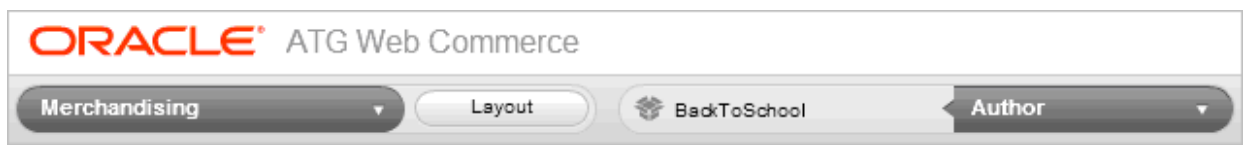
Merchandising displays the project dialog box, which contains all the project's assets.

When you create an asset, for example a product, the asset is automatically added to the current project, with the status New in the project dialog box. The new asset also appears in the Navigation pane for this project. The asset will be published to the live Web site when the project is deployed. The asset is also added to the versioning system.

If you plan to modify an asset but have not yet done so, you can add it to the project manually:

1. Select the assets to add. See Using the Navigation Pane (page 18).

2. Click the Actions menu and select Add to Project.

Note: For information about adding an asset to the project while previewing your site, see *Working with Visual Merchandising* (page 49).

Removing Assets from a Project

When you remove an asset marked as new, the asset is simply deleted from the system. When you remove an asset that you changed as part of this project, the changes are discarded and the asset is removed from the project. The previous versions of the asset still exist in the system.

To remove assets from a project, click the name of the project at the top of the Merchandising window to display the project dialog box.

• To remove an asset, click the x icon that appears next to the asset's status..

- To remove all assets, click the Select All link above the list of assets. Then click the Actions menu and select Remove from Project..

Completing Tasks in a Project

When you finish working on a task, you move the project to the next task in the workflow. For example, when you have finished creating the assets for a project, you must indicate that the Author task is complete so the next stage, usually a Content Review task, can start. Deployment is the last task in any project; the assets can be deployed to the live site only when all other tasks have been completed.

The default Manage Commerce Assets workflow includes the following tasks:

- Author

- Content Review

- Approve for Production Deployment

- Wait for Production Deployment Completion

- Verify Production Deployment

Note: If your ATG environment uses a staging site as well as a production site, a similar set of tasks is available for deploying to staging.

To complete a task in Merchandising:

1. Open the Merchandising project whose current task is complete.

2. Click the Task Action menu and select the next task in the list.
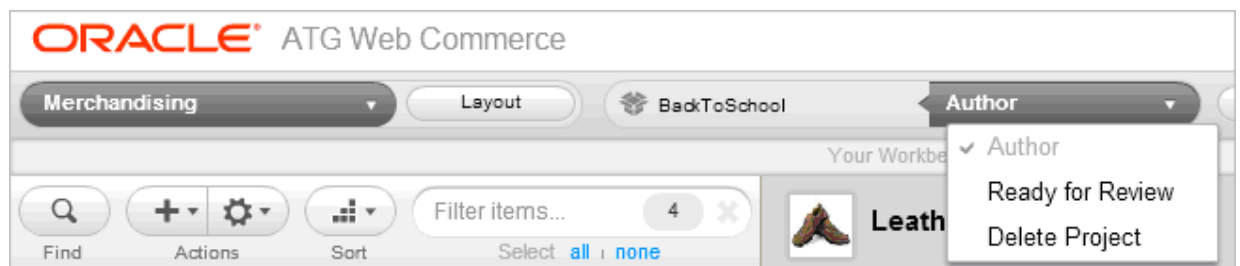
If the next task is assigned to you, Merchandising remains in your browser so you can start working on that task.

If the next task is not assigned to you or if there are no more tasks, the Business Control Center appears. You can either log out or begin working on another project.

3. If assets in your project are not up to date, Merchandising displays a warning and does not allow you to advance the project to the next task until you resolve the conflicts between the two versions. See Resolving Conflicts with Other Projects (page 10) for more information.

Notes:

- If the project has moved beyond the Author task to the Approve Content task, the assets can no longer be edited. To reactivate the Author task and allow asset editing, select Reject from the Select Action menu for the Approve Content task.

- If any of the deployment tasks are active (for example, Approve for Production Deployment), the assets cannot be edited. To reactivate the Author task in this case, select the corresponding Revert option from the Select Action menu and continue to select this option for each task until the Author task is active again.

- To delete a project, select Delete Project from the Actions menu for the Author or Content Review tasks. When you delete a project, the assets that were created for this project are not added to the versioning system, and any changes you made to existing assets through this project are not saved in the system as new versions.

- For more information about projects and tasks, see the *ATG Content Administration Guide for Business Users*.

Resolving Conflicts with Other Projects

The Merchandising conflict resolution feature warns you if the asset you used to create your working version has been changed and checked in by someone else. When you try to advance your project to the next task, Merchandising tells you that assets in your project are not up to date and does not allow you to advance the project until you resolve the conflicts between the two versions.

For example, suppose Ray adds an existing asset to a new project. You add the same asset to a different project. Ray edits his working version of the asset and deploys his project. The assets in his project are checked in and constitute a new base version of those assets. They now contain changes that the working versions in your project do not contain.

Asset Versions

When you want to edit an asset, you add the asset to your project and a new working version of that asset is created. When you complete your edits, you advance the project and deploy the asset. After the deployed change is accepted, your working version is checked in and becomes the head version of the asset on the main branch.

In some cases, another merchandiser might add the same asset to a different project. In that case, there are two working versions of the main asset, one in each project. Whichever working version is checked in first becomes the next main version. Any differences between the new main version and the working version in the other project must be resolved before the second project can advance to the next task.

Conflict Resolution

A version conflict occurs when the main version of an asset has been updated by another project while you are in the process of working on a previous version. To avoid losing the changes from the other project, you must merge them into your version before you can deploy. This process is called *conflict resolution*.

To resolve a version conflict, you review the changes made to your project and then compare them to the changes made in the checked-in project. You can then choose whether to keep the original version, your version, or the checked-in version from the other project. After the conflict is resolved, the base version referenced by your project is updated with the latest checked-in version, and your working version is updated with the values you chose when you resolved the conflict.

If there are conflicts between collection properties (lists, sets, maps, or arrays), Merchandising suggests an additional value that combines your changes with the changes from the other project. For more information, see Conflict Resolution for Collection Properties (page 12).

The following figure shows the conflict resolution process:
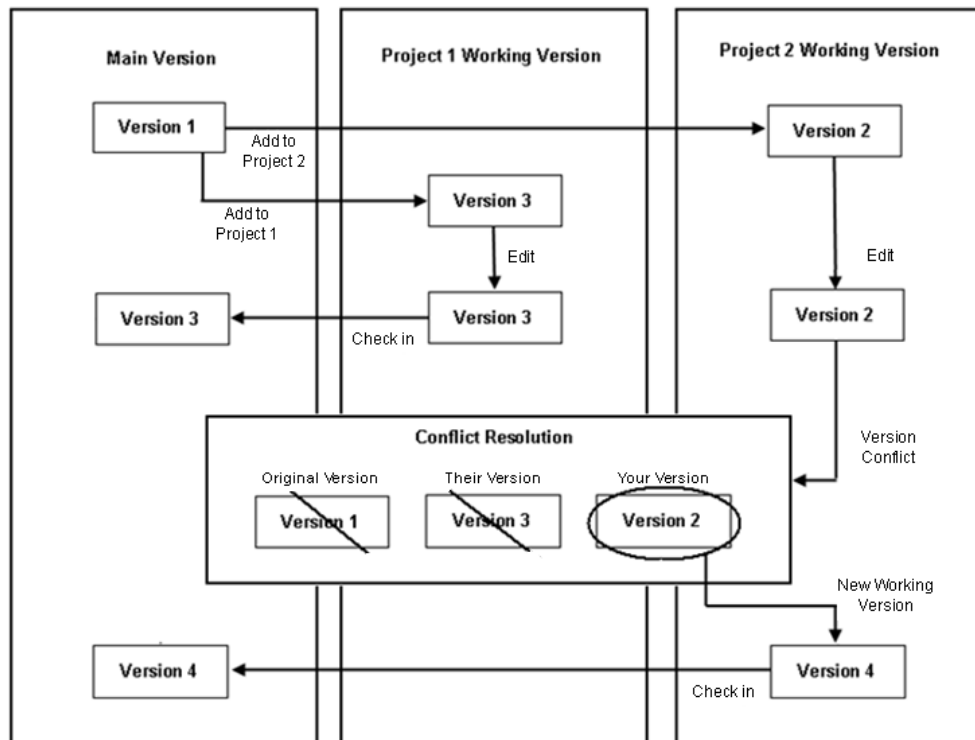
Resolving Version Conflicts

To resolve a version conflict in an Merchandising project:

1. In a Merchandising project, click the project name at the top of the Merchandising window.

   In the following illustration, the project name is BackToSchool.
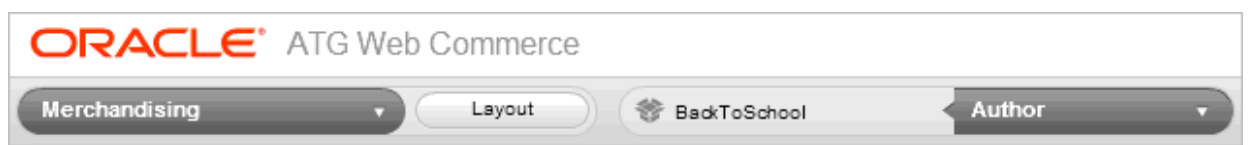
   Assets that are out of date and need to be merged with the latest version are marked with a red icon. To sort the asset list so all conflicts appear together, click the icon's column header.

2. Select the name of the asset to open it in the Details pane.

3. Click Review Changes.

   The Review Changes dialog box shows the properties that are in conflict. If there are modified properties that are not in conflict, they appear in a second table (see Reviewing Changes (page 36)).

Original Version	Their Version	Your Version	Merged Version
○ 1. Crystal Decanter	○ 1. Crystal Decanter 2. Medium Crystal Decanter	○ 1. Crystal Decanter 2. Large Decanter 3. Small Decanter	○ 1. Large Decanter* 2. Small Decanter* 3. Medium Crystal Decanter* 4. Crystal Decanter

4. Choose the value that you want to keep in your project:

   • Original Version—this is the value that you started with when you added the asset to your project.

   • Their Version—this is the value that was deployed by another user since you added the asset to your project.

   • Your Version—this is the value from your working version.

   • Merged Version—this value appears only for collection properties and shows a suggested combination of Their Version and Your Version. See Conflict Resolution for Collection Properties (page 12).

5. Click Resolve Conflicts.

   The asset is updated with the property values you select.

6. Repeat these steps for each conflict until no more asset conflicts appear in the Project dialog.

7. When you are satisfied with your working versions, advance your project to the next task. See Project Basics (page 5).

Conflict Resolution for Collection Properties

Resolving conflicts between lists, maps, sets, and arrays is often more complicated than simply picking one version over another, so Merchandising suggests a combination of the two versions. You can choose the original version, your version, the version from the other project, or the suggested combination. If none of the options provides exactly what you want, choose the option closest to your desired value and then modify the asset before advancing the project to the next task.

In the suggested combination:

• Added, reordered, and changed items appear at the top and are marked with an asterisk.

• Unchanged items appear next in normal text.

• Removed items are displayed at the bottom of the list with a strikethrough. These items are shown for your information and are not part of the suggested collection.

The following figure shows an example of a collection property that has a conflict with another project:

Original Version	Their Version	Your Version	Merged Version
○ 1. Crystal Decanter	○ 1. Crystal Decanter 2. Medium Crystal Decanter	○ 1. Crystal Decanter 2. Large Decanter 3. Small Decanter	○ 1. Large Decanter* 2. Small Decanter* 3. Medium Crystal Decanter* 4. Crystal Decanter

Note: Suggested combinations are provided only for collection properties. The Merged Version column is blank for other property types. If there are no collection properties in conflict, then the Merged Version column does not appear.

The sections that follow describe how Merchandising determines the merged changes.

How Collection Values Are Merged

To determine the difference between conflicting collections, Merchandising finds the differences between Their Version and Original Version, then finds the differences between Your Version and Original Version, and finally combines the two sets of differences and applies them to Original version.

These rules determine the final outcome:

- Changed, reordered, and added items in either project's collection (theirs or yours) are moved to the top of the suggested merged version.

- When updates to an item in a collection conflict between your version and the other version of the collection, your updates take precedence, unless the item was removed in the other version.

- If an item is removed from the collection in one project and changed or reordered in the other, the remove operation overrides the change or reorder operation by default. You can configure this setting. See Conflict Resolution for Collection Properties (page 12).

Sets

Sets are not ordered and do not allow duplicates, and are therefore simpler to combine than other types of collections. When versions of sets are combined, Merchandising considers only additions and removals when creating the merged version. If both projects add or remove the same item, then that item appears only once in the merged list.

The following examples illustrate how sets are combined.

In the following table, removed items are not shown in the merged version. In Merchandising, removed items are displayed at the bottom of the Merged Version column with a strike through the name.

Conflict Description	Original	Their Version	Your Version	Merged Version
Two projects add different items Both items are added.	Blue Green Red	Blue Green Red **Yellow**	Blue Green Red **Orange**	***Yellow** ***Orange** Blue Green Red
Two projects remove different items Both items are removed.	Blue Green Red	Blue Green	Green Red	Green
Two projects add and remove different items All items marked for add are added and all items marked for removal are removed.	Blue Green Red	Blue Green **Yellow**	Blue Red **Orange**	***Yellow** ***Orange** Blue

Maps

Maps are collections that contain key/value pairs that map one value to another, such as a list of sizes and their numeric equivalents. Changes to maps can include:

• Adding key/value pairs

Maps do not allow duplicate keys, so if both projects add the same key/value pair to the map, then it is added only once. For example, if your project adds the key value pair M = 6-8 and another project adds the key/value pair M = 8-10, then your changes, M = 6-8, take precedence.

• Editing the key or the value in an existing key/value pair

If each project provides a different value for the same key/value pair, then the change from your project takes precedence and is kept in the combined changes. For example, if your project edits the value of the key XL so that XL = 14 and another project edits the key XL so that XL = 16, then your changes take precedence.

• Removing key/value pairs

The following table provides some examples of how changes to map items are combined. Removed items are not shown in the merged version. In Merchandising, removed items are displayed at the bottom of the Merged Version column with a strike through the name.

Conflict Description	Original	Their Version	Your Version	Merged Version
One project removes a map item, the other project adds a map item The removed item is removed and the added item is added.	S (4-6) M (8-10) L (12-14)	S (4-6) M (8-10) L (12-14) **XL (16-18)**	S (4-6) L (12-14)	**XL (16-18)*** S (4-6) L (12-14)
One project edits an item, the other project adds an item The edited item is updated and the added item is added.	S (4-6) M (8-10) L (12-14)	S **(2-4)** M (8-10) L (12-14)	S (4-6) M (8-10) L (12-14) **XL (16-18)**	S **(2-4)*** **XL (16-18)*** M (8-10) L (12-14)
One project edits an item, the other project removes the item The item is removed. **Note:** You can configure whether removed items take precedence over changed items. See Conflict Resolution for Collection Properties (page 12).	S (4-6) M (8-10) L (12-14)	S **(2-4)** M (8-10) L (12-14)	M (8-10) L (12-14)	M (8-10) L (12-14)
Both projects edit the same item The value in your project is kept.	S (4-6) M (8-10) L (12-14)	S **(2-4)** M (8-10) L (12-14)	S **(2-6)** M (8-10) L (12-14)	S **(2-6)*** M (8-10) L (12-14)
Each project edits a different item Both changes are kept.	S (4-6) M (8-10) L (12-14)	S **(2-4)** M (8-10) L (12-14)	S (4-6) M **(6-8)** L (12-14)	S **(2-4)*** M **(6-8)*** L (12-14)

Lists and Arrays

Lists and arrays are collections that contain ordered lists of items and, if you have not prohibited them, can contain the same item multiple times. Changes to lists and arrays can include:

- Adding items

- Reordering items

- Removing items

- Adding, reordering, or removing duplicate items (if allowed in your environment)

  For information about preventing duplicates, see the *ATG Business Control Center Administration and Development Guide*.

Note: In some cases, items that were not explicitly changed in either project are marked as changed in the suggested combination because of the way ATG calculates reordering.

The following table provides some examples of how changes to lists and arrays are combined. Removed items are not shown in the merged version. In Merchandising, removed items are displayed at the bottom of the Merged Version column with a strike through the name.

Conflict Description	Original	Their Version	Your Version	Merged Version
Two projects reorder items The two list orders are combined. **Note:** Item B is marked as changed although it appears to be the same in all collections. This is because of the way that ATG calculates reordering.	A B C D E	**C** B **A** D E	**E** B C D **A**	**A*** **B*** **C*** **E*** D
Two projects add different items to the same location The items are added to the top of the list.	A B C	A B C **D**	A B C **E**	**D*** **E*** A B C
Two projects add the same item in different locations The item is added twice to the top of the list. **Note:** If duplicates are prohibited, the item is added only once.	A B C	A **D** B C	A B **D** C	**D*** **D*** A B C

Conflict Description	Original	Their Version	Your Version	Merged Version
One project reorders items, the other project removes an item The two list orders are combined and the removed item is removed. **Note:** You can configure whether removed items take precedence over reordered items. See Conflict Resolution for Collection Properties (page 12).	A B C D E F G	**B** **D** **E** **F** A C G	A B D E F G	**A*** **E*** **F*** B D G
One project adds items, the other project removes an item The new items are added to the top of the list, and the removed item is removed.	A B C D	A B C D E F	A B D	**E*** **F*** A B D

Maximum Collection Size for Combining Changes

For very large collection values, Merchandising displays only the first 2300 items on the Review Changes page by default. As a result, if any conflicting version contains more items than the display limit allows, then a merged version is not suggested because the combinations cannot be displayed.

3   Merchandising UI Overview

This chapter provides an overview of the main elements of the Merchandising user interface. To learn how to use the interface to perform merchandising tasks, see *Creating and Managing Assets* (page 27).

When you create or open a project from the BCC Home page, the Merchandising main page opens. The main page has two panes: a Navigation pane on the left and a Details pane on the right. A navigation bar across the top provides links to common options and information about the current session.
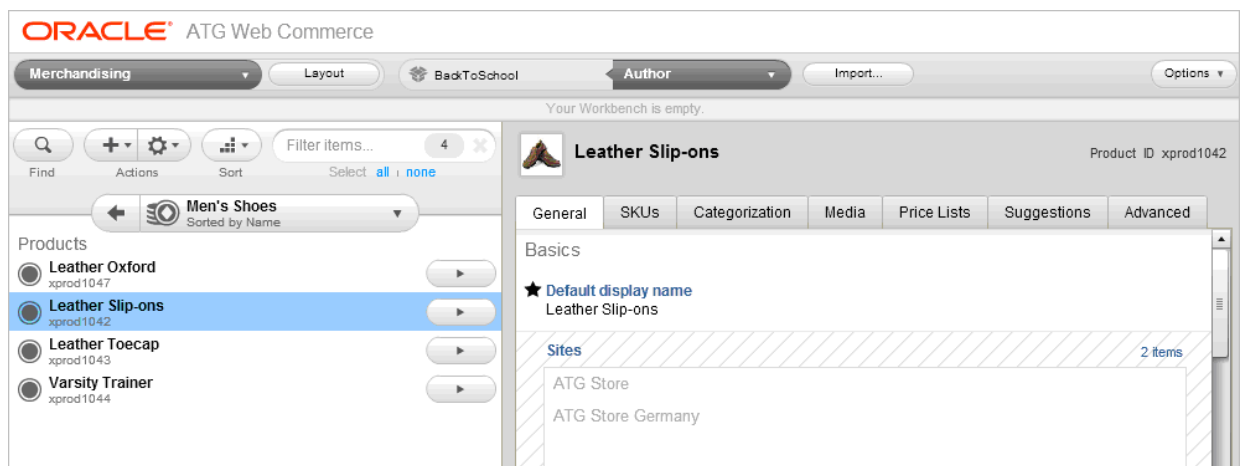
Navigation Basics

The following are some key terms that you need to be familiar with when you browse or search for items in the Merchandising Navigation pane:

· **Parent assets** are those immediately above the current asset in the hierarchy. For example, Accessories might be the parent category of the product Shoulder Bag.

· **Ancestors** are all the assets from which the current asset descends. For example, Commerce Root, Women's Apparel, Gift Ideas, For Her, and Accessories are all ancestor categories of the product Shoulder Bag.

Using the Navigation Pane

The Navigation pane on the left-hand side of the Merchandising window lets you browse or search for commerce assets.

Note: This section describes how to use the Navigation pane for catalog assets and promotions only; that is, any assets available when you select Merchandising from the application dropdown menu. To learn how to find and browse other types of assets, see the following chapters:

To browse / find this asset…	See this chapter…
Facets	*Defining Facets* (page 165)
Search configurations	*Defining Search Configurations* (page 175)
Search tests	*Testing Search Queries* (page 197)
SEO tags	*Creating and Managing SEO Tags* (page 85)
Price lists	*Creating and Managing Price Lists* (page 149)

Navigation Toolbar

The toolbar at the top of the Navigation pane is available in both the browse and find views.
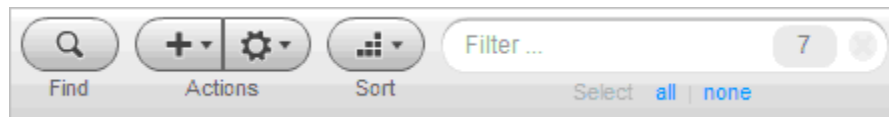
The following elements make up the toolbar:

• The **Find/Browse** button switches between the Browse panel and the Find panel.

• The **Create** button lets you add new assets.

• The **Actions** button lets you work with selected assets. You can edit, move, duplicate, link, and export assets. You can also add selected assets to a project and view their child assets.

• The **Sort** button lets you sort the list of assets by name or ID, in ascending or descending order.

• The **Filter** tells you how many assets appear in the list and lets you filter the list.

• The **Select** links select and deselect all the assets listed in the Navigation pane. Click all to select everything in the list; click none to deselect everything.

Browse Panel

Use the Browse panel to navigate the asset hierarchy. For example, you can explore products using the catalog hierarchy, find media assets by folder, or display an alphabetical list of promotions. Your Merchandising administrator configures the hierarchy of assets displayed in the Browse panel.

Click the arrow button next to each asset to drill down to the next level. For example, click the arrow next to a category to see the list of products it contains. The name of the parent asset displays above the list of its children. For example, in the following illustration, the Home Store Root category is the parent asset; its child categories are listed below it.
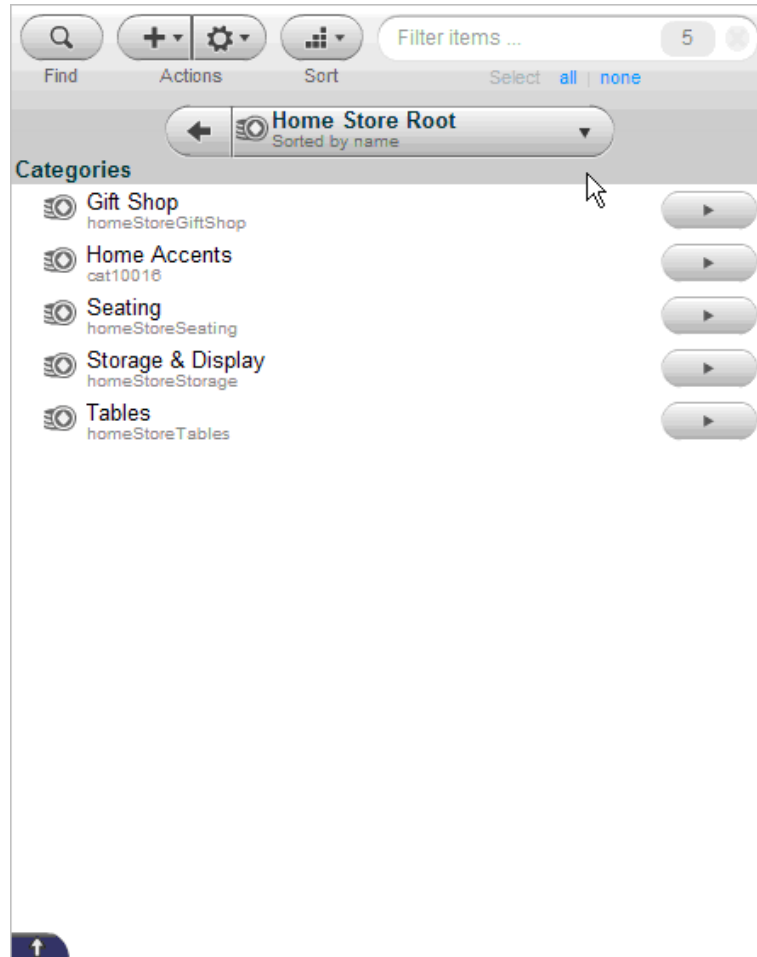
To move backwards through the hierarchy one level at a time, click the back arrow to the left of the parent asset. To choose a level in the hierarchy to move back to, click the down arrow to the right of the parent asset, then select an ancestor asset from the list.
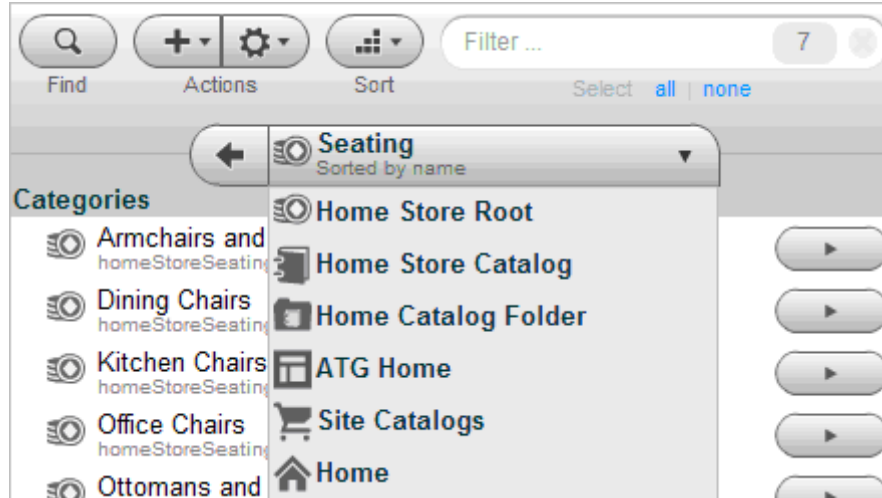
See Filtering Results (page 22) to learn how to narrow the list of child assets in the Browse panel so it contains only assets whose names include letters or words you specify.

Find Panel

Use the Find panel to search for assets that match criteria you specify. You begin a search by providing an asset type. You can search for all assets of that type, search for assets by name or ID, or further narrow the scope of your search with additional criteria, such as property values that must match the values set in the returned assets.
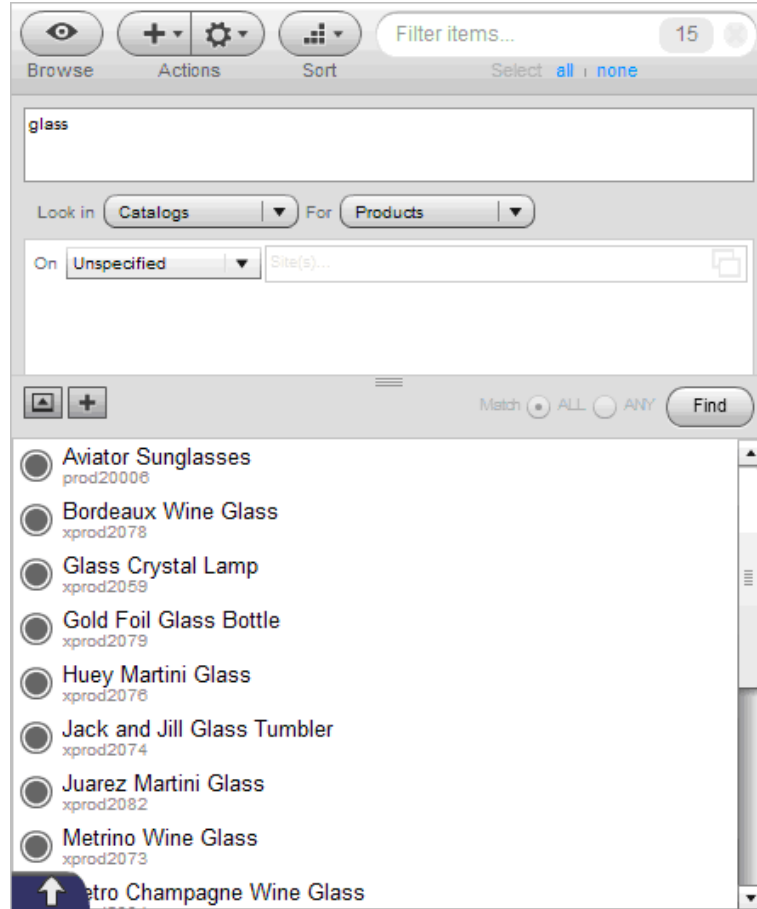
To search for assets in the Find panel:

1. Select an asset family from the Look In dropdown menu, then select an asset type from the For dropdown menu.

   For example, look in Catalogs for Products.

2. In a multisite environment, if you selected Catalogs, specify which registered sites to search:

   - Unspecified: (default) Ignore the site property when searching for assets.

   - This site: Search only for assets whose site property matches a single site you select.

   - These sites: Search only for assets whose site property matches one or more sites you select.

   - Any sites: Search only for assets whose site property contains at least one site.

   - No sites: Search only for assets whose site property is empty.. See Unsited Items (page 32) for more information.

   For more information about registered sites, see Assets in a Multisite Environment (page 38).

3. Type or paste in full or partial asset names, IDs, or both.

- Separate multiple entries with commas or line breaks

- You can mix names and IDs in the same search criteria. For example, entering `glass, xprod2162` returns all items whose names include the word glass as well as the item whose ID is xprod2162.

4. (Optional) You can further narrow the search by clicking the + button and querying specific asset properties.

   The following example shows a query for all assets whose Brand property value is ATG Home.
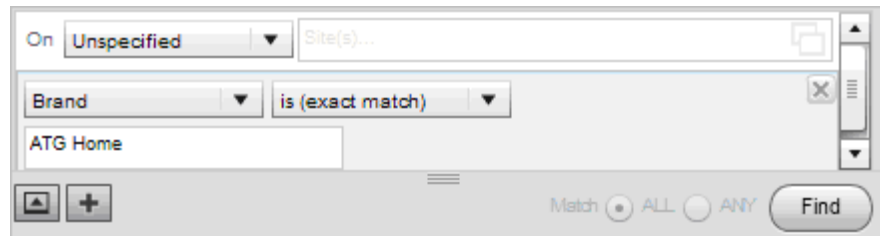
You can narrow the search criteria further by clicking the + button again and providing more information about the desired asset. If you create multiple criteria, select a query operator

- Match ALL to return assets that match all the criteria you created.

- Match ANY to return assets that match at least one criterion.

To remove a criterion, click the corresponding x button.

5. Click Find.

   Your search results appear in a list at the bottom of the panel.

Note: Criteria and results in the Find panel are cleared when you navigate away from Merchandising to another application, such as Targeting and Segmentation or Search Merchandising, and then navigate back to the Merchandising UI.

See Filtering Results (page 22) to learn how to narrow the list of search results so it contains only assets whose names include letters or words you specify.

Filtering Results

The Filter control lets you quickly narrow the contents of a child asset list in the Browse or Search panel and in the Project dialog box.

Begin by typing or pasting some text in the Filter control. The Filter control matches letters or numbers that you type, wherever they appear in the asset name or ID, not just at the beginning. Usually, as you type more characters, there are fewer matches. You can enter up to 50 characters. The counter displays the number of matches in the list.

In the following example, the search results for `glass` include 15 products:
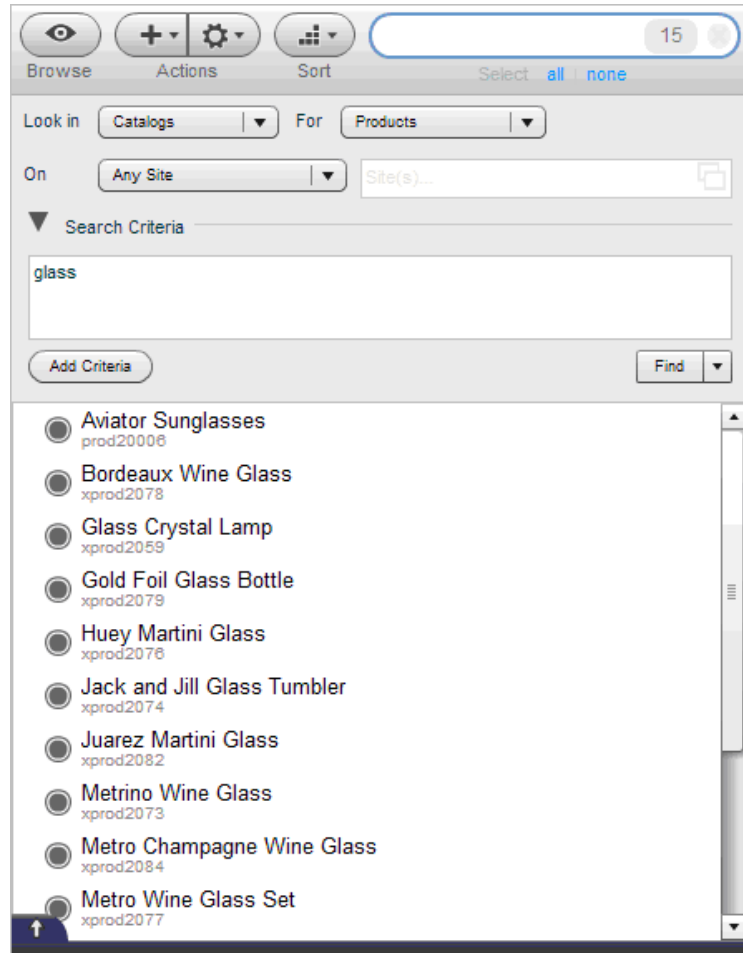
When you type `wine` into the Filter control, the search results list changes to include only the six products whose names include both glass and wine.
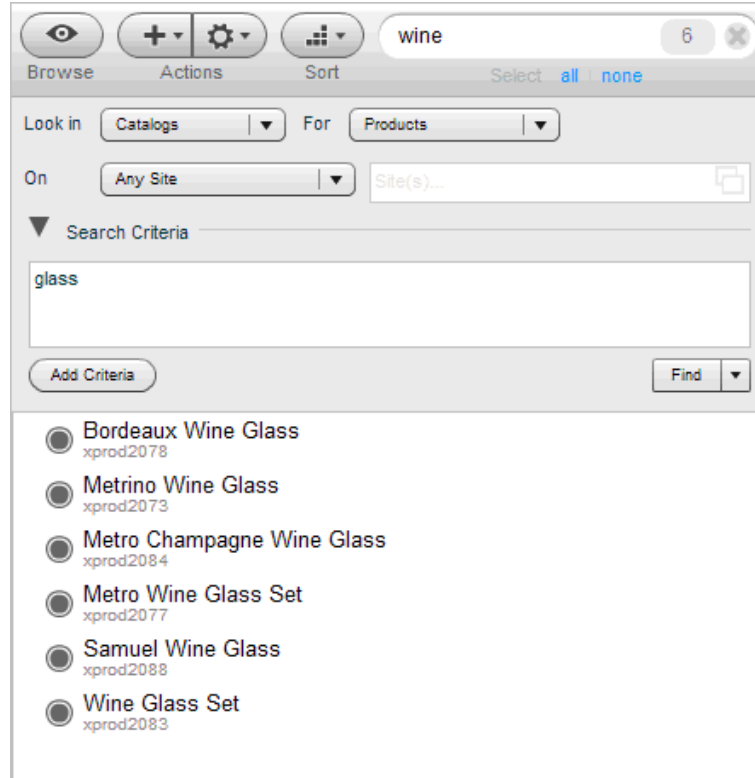
When you click the delete icon to clear the Filter control and type `20006`, the search results include the one product whose ID is prod20006.
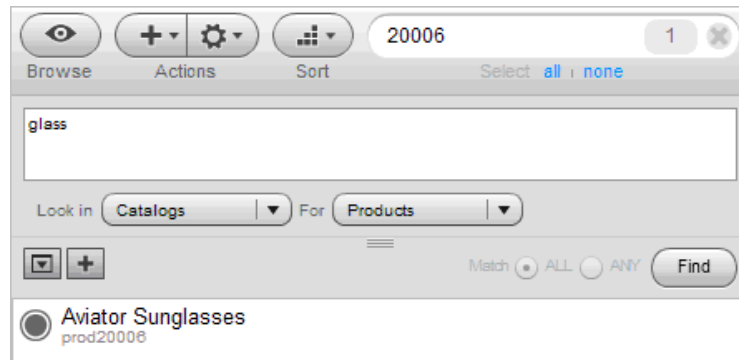
Using the Details Pane

When you select an asset in Merchandising, its properties appear in the Details pane, divided into tabs for easier viewing. You can select assets in the Navigation pane or from the Details pane of another asset; for example, you can select a parent category from a product. Regardless of how you access an asset, its Details pane displays the same information.

For more information, see *Creating and Managing Assets* (page 27).
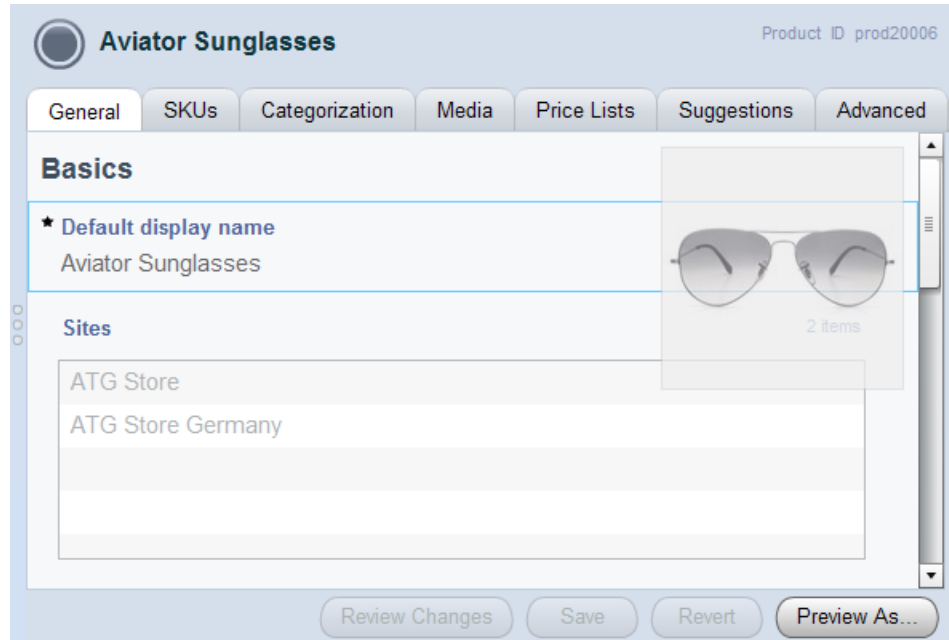
Using the Workbench

The workbench pane that appears at the top of the Merchandising window holds Multi Edit operations. When the workbench contains no Multi Edit operations, it appears as a thin bar at the top of the Navigation and Details panes.
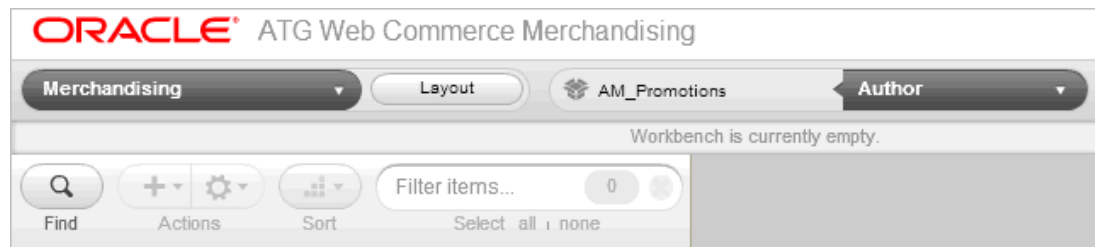
When you drag assets to the workbench, it expands to display Multi Edit operations:

For more information about the workbench, see .

Navigating a Project

The menu that appears at the top-left of the Merchandising window lets you quickly move to different parts of a project. To move to a different part of the project, or to leave Merchandising and return to the BCC Home page, click the down arrow and select a location in the menu that appears.
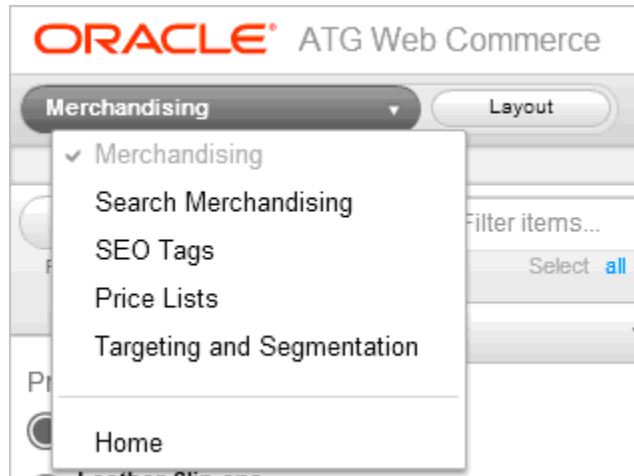
Note: The locations available in this menu depend on the permissions associated with your user profile. You may see more or fewer locations than shown in this illustration.

4   Creating and Managing Assets

This chapter provides an overview of creating and managing catalog assets in Merchandising. The seven chapters that follow this one describe how to create and manage each type of asset Merchandising supports.

Creating New Assets

This section provides an overview for creating commerce assets. The chapters that follow this one describe how to create and manage each type of asset Merchandising supports, including catalog folders, catalogs, categories, products, SKUs, search facets, promotions, pricing, coupons, media folders, and media items.

To create a new asset:

1. In a Manage Commerce Assets project, use the Browse panel to navigate to the catalog asset that will be the new asset's parent. For example, to create a new product, navigate to the category where you want to create the product.

    See Using the Navigation Pane (page 18) for more information.

2. Click the Create button in the toolbar and select the type of asset you want to create.
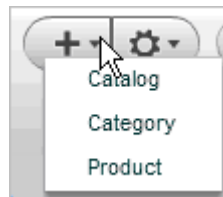
    The list of asset types of you see depends on the following:

    *   The permissions associated with your user profile. Talk to your administrator if you have questions about your permissions.

    *   Where you are in the catalog hierarchy in the left-hand Navigation pane.

        For example, in the Browse panel, at the top level of a catalog, you can create a catalog or a category. If you drill down one more level, into a category, you can create a catalog, category, or product. See Browse Panel (page 18) for more information.

3. Fill in the property fields in the Details pane. Required fields are marked with a star icon. See Working with Asset Properties (page 39) to learn how to use the different types of Merchandising property editors.

4. Click Create.

Creating Assets from the Find Panel

In addition to creating assets within a hierarchy on the Browse panel, you can also create assets from the Find panel. In the Find panel, you can create whatever type of asset is currently selected in the For dropdown menu.
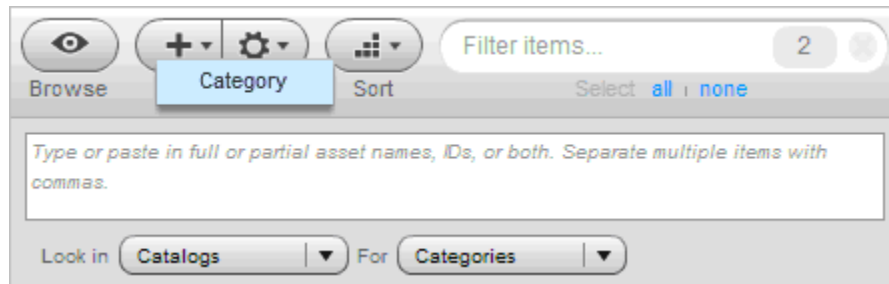
Unlike assets you create by selecting a parent in the Browse panel, most assets you create from the Find panel do not automatically have a parent asset specified in the Details pane. Unless you specify a parent, Merchandising creates the asset in a default location that may not be where you expect. See the chapters that follow this one for information about the default location for each type of newly created asset.

Duplicating Existing Assets

It is sometimes easier to duplicate an existing portion of your catalog than to create individual assets one at a time. For example, in a multisite environment, you might need to create several catalogs that share characteristics like structure and product set, but use different price lists. In this case, copy a catalog from one site to another and modify the property values as needed.

For example, a copy of a category includes copies of all that category's children, organized in the same hierarchy as the original. The default name Merchandising gives a duplicate asset is the name of the original followed by (copy), though your administrator might have customized Merchandising to use a different format.

The duplicate asset is not an exact copy of the original. By default, almost all the properties you can work with in Merchandising are copied. Some properties, such as the creation date, are not copied. Your administrator can control which properties are copied to the duplicate asset.

A duplicate is completely independent of the asset you copied it from; changes made to one do not affect the other. However, any child assets, which retain their hierarchy in the duplicate asset, are links to the original child assets. If you change a property value in one of the original asset's children, that change is visible in the duplicate asset's child. When you duplicate price list folders or media folders that contain child assets, those child assets are also duplicated, not links of the original child assets.

To duplicate assets:

1. In a Manage Commerce Assets project, select the assets you want to duplicate. See Using the Navigation Pane (page 18) for details.

2. Click the Actions button in the toolbar and select Duplicate.

3. In the dialog box that appears, select the parent asset that will contain the duplicates. See Using the Navigation Pane (page 18) for details.

4. Click OK.

Linking and Unlinking Assets

Linking a catalog asset associates it with a parent asset. Linking is useful when you want a product to appear in multiple catalogs or categories. For example, suppose your catalog contains a product called Gas Hibachi in the Outdoors category. To make this product also appear in the Father's Day Gifts category, simply link it to that category.

Linked assets have multiple parents: one parent for each location. When you make a change to the asset in one location, that change is reflected in all locations.

Note: You cannot link or unlink Media assets, promotions, facets, search configurations, SEO tags, or price lists.

Linking Assets

To link assets to another parent:

1. In a Manage Commerce Assets project, select the assets you want to link. See Using the Navigation Pane (page 18) for details.

2. Click the Actions button in the toolbar and select Link > Link.
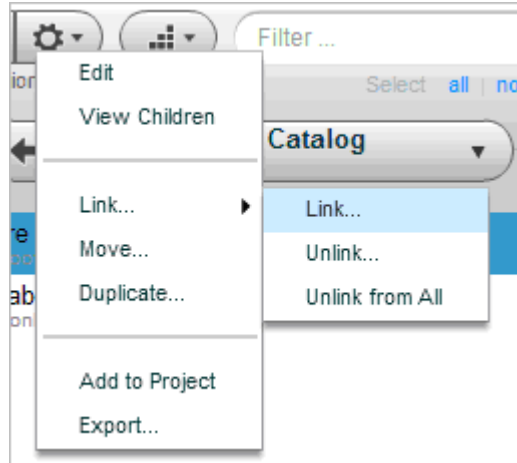
3. In the dialog box that appears, select a parent catalog or category. See Using the Navigation Pane (page 18) for details.

4. Click OK.

Unlinking Assets

Unlinking breaks the association between an asset and a parent. You can unlink an asset from a single parent or from all its parents. If you unlink an asset from all its parents, Merchandising moves it and all its children to the Uncategorized Items list or, in a multisite environment, to the Unsited Items list. For more information, see Uncategorized and Unsited Items (page 31).

To unlink an asset from one or all parents:

1. In a Manage Commerce Assets project, select the assets you want to unlink. See Using the Navigation Pane (page 18) for details.

2. Click the Actions button and select Link.
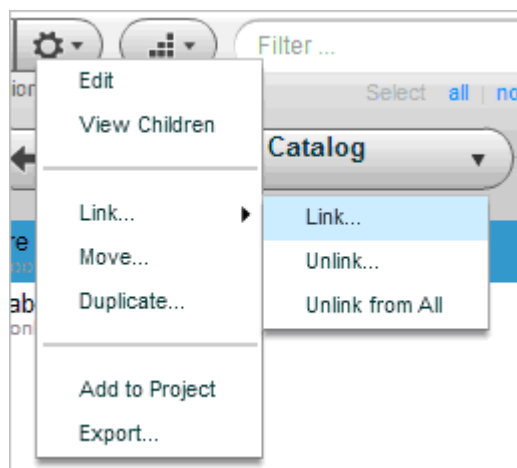
3. Select one of the following:

- Unlink… to remove the asset from the selected parent only.

- Unlink From All… to remove the asset from all locations in the catalog hierarchy.

4. In the Confirm Unlink dialog box, review the associations that unlinking will break. Click Unlink to unlink the asset.
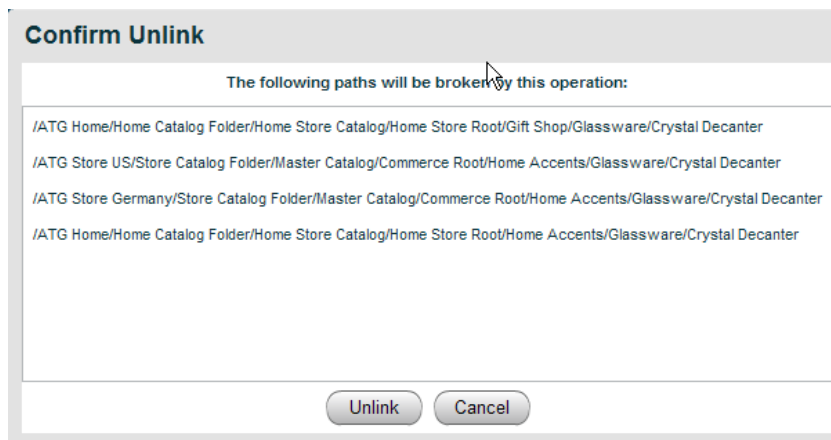
Uncategorized and Unsited Items

Catalog assets that are not linked to any parent in the catalog hierarchy appear in a separate list at the top of the Catalogs list in the Browse panel:

- In an environment with no registered sites (default), these items appear in the Uncategorized Items list.

- In a multisite environment, these items appear in the Unsited Items list.

You can view and work with uncategorized and unsited assets just as you do any other catalog asset: Open the list and double-click an asset to display its properties.

You cannot create new assets in the Uncategorized Items or Unsited Items list, and you cannot drag assets into it.

To move assets out of the Uncategorized Items or Unsited Items list, link them to a parent in the catalog hierarchy. See Linking and Unlinking Assets (page 29) for more information.

Uncategorized Items

Uncategorized items are categories, products, or SKUs that are not linked to any parent in the catalog hierarchy, that is, they are not associated with any catalogs. Uncategorized items do not appear in the navigation for your Web site, and visitors cannot search for them unless your administrator specifically configures ATG Search to allow uncategorized items to appear in search results.

A category, product, or SKU becomes uncategorized when one of the following happens:

- It has been unlinked from all parents with the Unlink or Unlink All command.

- Its ancestor has been unlinked from all parents. For example, a product whose only parent category is an uncategorized item is also uncategorized. Any of the product's children, such as SKUs associated with the product, become uncategorized, too.

- It is imported into Merchandising through an external data feed. This usually applies only to products and SKUs, since they are the assets most likely to be imported.

- It is created from the Merchandising Find panel. For more information, see Creating Assets from the Find Panel (page 28).

Unsited Items

In a multisite environment, unsited items are catalog folders, catalogs, categories, products, or SKUs that have no site membership, that is, they are not associated with any of the environment's registered sites. Unsited items do not appear in the navigation for your Web sites, and visitors cannot search for them unless your administrator specifically configures ATG Search to allow unsited items to appear in search results.
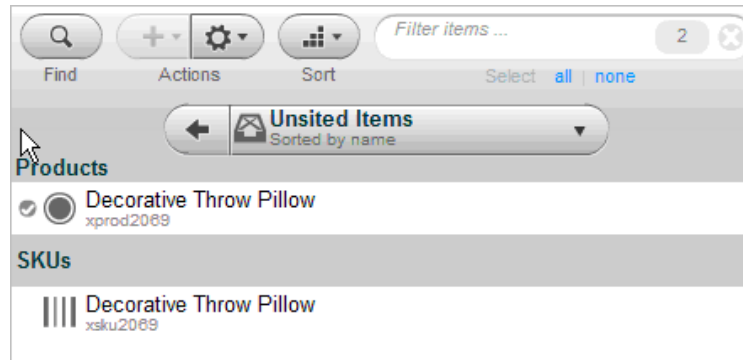
A catalog, category, product, or SKU becomes unsited when:

- It has been unlinked from all parents on all sites with the Unlink or Unlink All command.

- Its ancestor has been unlinked from all parents. For example, a product whose only parent category is an unsited item is also unsited. Any of the product's children, such as SKUs associated with the product, become unsited, too.

- It is imported into Merchandising through an external data feed. Products and SKUs are the assets most likely to be imported though a feed.

- It is created from the Merchandising Find panel. For more information, see Creating Assets from the Find Panel (page 28).

Moving Assets

Moving an asset changes the structure of your catalog by changing the parent of the asset you move. For example, you can move a product from the Uncategorized Items list to a category in the catalog.

You can move more than one asset at a time, but you must move them all to the same destination. Any child assets are also moved.

To move assets:

1. In the Browse panel, select the assets you want to move. (You cannot move assets in the Find panel.) See Using the Navigation Pane (page 18) for details. Remember that any child assets are also automatically selected.

You can also select media assets, promotions, promotion folders, coupons, and coupons folders in the Find panel.

2. Click the Actions button in the toolbar and select Move.

3. In the dialog box that appears, select a new parent asset. See Using the Navigation Pane (page 18) for details.

4. Click OK.

Previewing Assets

Merchandising lets you preview assets so you can see how your changes will appear on your live Web site. Preview functionality must be set up by your administrator. If your administrator has not enabled preview, the Layout and Preview buttons do not appear in the Merchandising user interface.

Note: If your administrator enabled the Visual Merchandising features, you can edit assets directly from the preview session For more information, see *Working with Visual Merchandising (page 49)*.

To launch a preview session at any time from Merchandising, complete the following steps:

1. Click the Layout button at the top of the Merchandising window.
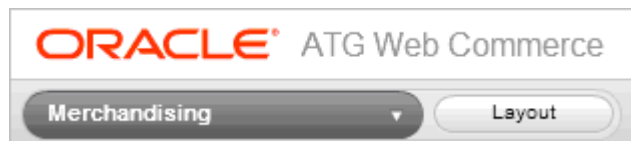
The preview session launches immediately, using the default landing page, preview user, and site that your administrator configured when he or she enabled preview. The preview session replaces Merchandising in the browser window.

2. To change the landing page, user, site, or preview date and time, see Changing Options in a Preview Session (page 34).

3. To close the preview session and return to Merchandising, click the Data button.
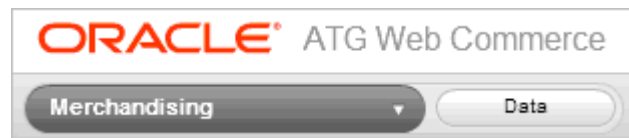
To launch a preview session while editing an asset, complete the following steps:

1. Select the asset you want to preview. See Using the Navigation Pane (page 18) for details. If you want to preview an asset you are currently working on, make sure you save your changes.

2. Click the Preview As button at the bottom of the Details pane.

Preview As opens the Preview Launcher dialog box, where you select a preview user whose profile you use to view the page, a preview landing page, and in a multisite environment, a preview site:

- Preview User: The user profile you use to view the page.

- Preview Site: In a multisite environment, the site on which to view the page.

- Preview Landing Page: The Web site page to preview.
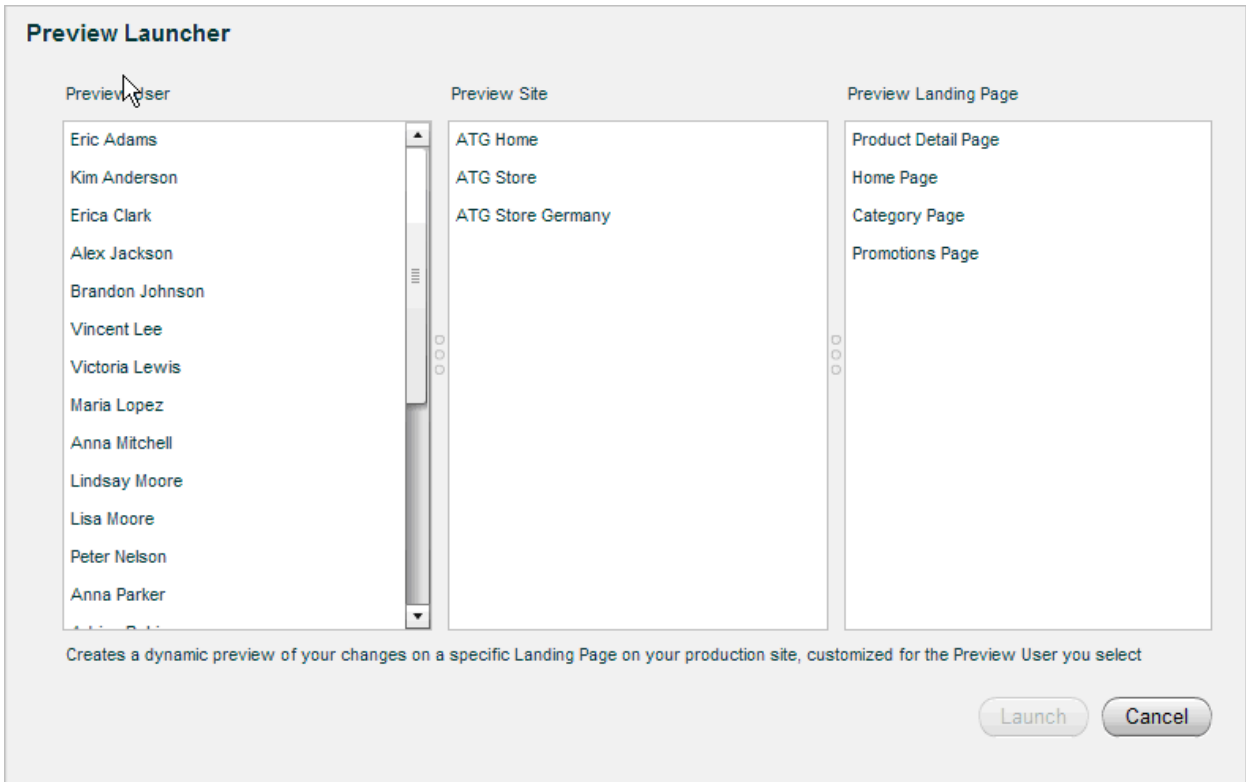
3. Click Launch to start a preview session that uses the selected landing page, user profile, and optionally, site.

After you launch a preview session from an asset in the Details pane, its properties window displays a combination Preview / Preview As button:

- **Preview** starts a new preview session using the user profile, landing page, and site settings from the last preview session launched from that asset.

- **Preview As** opens the Preview Launch dialog, where you can change preview settings before launching a new preview session.

- To close the preview session, click the Data button.

Changing Options in a Preview Session

In each preview session, the Preview toolbar appears at the top-of the browser window.

Use these controls to change preview options while you are in the preview session:

- **User/Site** displays the Preview Launcher dialog, where you can select a different landing page, user profile, and optionally, site for the preview session.

- **Date/Time** displays the Preview by Date/Time dialog, where you can select a different date and time for the preview session.

Note: Changes to Preview options are not saved when you log out of Merchandising.

Changing the Date and Time for a Preview Session

You can choose to preview how your site would look if your changes were deployed right now or at a future date and time. For example, suppose you are working on a seasonal microsite that will not go live until next month. If you set the preview date to the go-live date (specified by the assets' Start Date property), you can see how your site will look on the day of the launch.

To change the date and time for a preview session, complete the following steps:

1. Click the Date/Time icon in the Preview toolbar to display the Preview by Date/Time dialog.
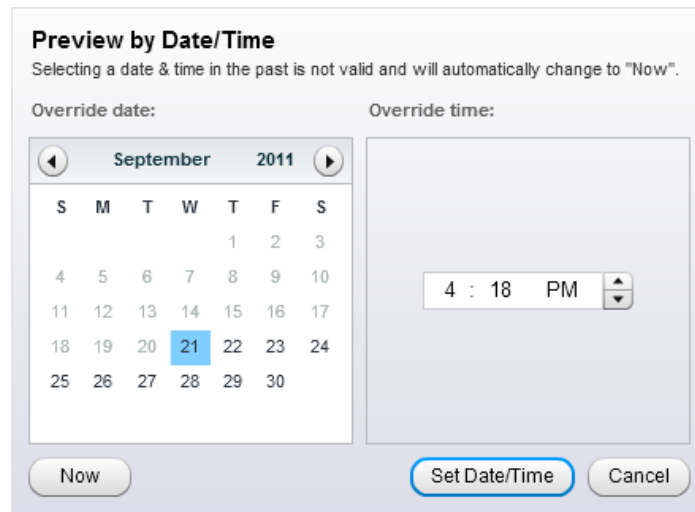
2. To preview assets as they will appear at a future date and time, click the calendar and select a date. Use the up and down arrows to set the hour, minute, and AM/PM portions of the time.

    Note: The date and time are evaluated based on the date and time on the server.

    To preview assets as they appear right now, click the Now button.

3. Click Set Date/Time.

    The Date/Time control in the Preview toolbar changes to show the new preview date and time and to indicate that you cannot use the Visual Merchandising features with this preview session. (You can edit assets

with the Visual Merchandising features only if the date and time setting is Now. For more information, see
Working with Visual Merchandising (page 49).)

4. (Optional) To set the Preview date and time back to Now, click the X icon in the Date/Time control.

Reviewing Changes

Merchandising lets you review changes to assets by comparing an asset you are working on with the most recently checked-in version of that asset. You can optionally undo individual changes.

To review changes to an asset, complete the following steps:

1. In a Manage Commerce Assets project, select the asset whose changes you want to review. See Using the Navigation Pane (page 18) for details.

    Tip: You must save your changes before you can review them. Assets with saved changes are marked with a check mark badge when you view them in the Browse pane. In the following illustration, Tumbler Glass has saved changes:
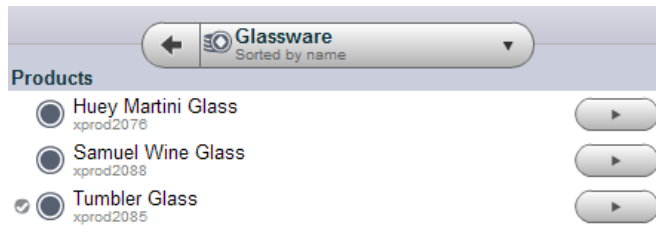
2. Click the Review Changes button at the bottom of the Details pane.

3. (Optional) To undo a change, click the checkbox next to the name of a changed property, then click Revert Selected Changes.

4. Click Close when you are finished reviewing the asset.

Deleting Assets

When assets are no longer used on your sites, you can remove them from the system.

When you delete an asset before its project has been deployed, the asset is immediately removed from Merchandising and the underlying database. The chapters that follow contain details about deleting particular types of assets.

To delete an asset that has already been deployed, you must create a new project for deleting the assets and then deploy that project. See the *ATG Content Administration Guide for Business Users* for information about deleting deployed assets from the system.

To delete an undeployed asset:

1. In the Find panel, select the assets you want to delete. (You cannot delete assets in the Browse panel.) See Using the Navigation Pane (page 18) for details. Remember that any child assets are also automatically selected.

2. Click the Actions button in the toolbar and select Delete.

3. Click OK to delete the asset.

Deleting Parent Assets and Linked Assets

When you delete a parent asset, such as a category that contains products, the child assets move to the Uncategorized or Unsited Items list, retaining their hierarchical relationships to each other. The only exception is deleting a catalog folder that contains another catalog folder; in this case, the child folder moves to the root level of the catalog. See Uncategorized and Unsited Items (page 31) for more information.

When you delete a linked asset, the asset is removed from all parents. See Linking and Unlinking Assets (page 29) for more information.

Assets in a Multisite Environment

In a multisite environment, your administrator associated specific catalog assets (catalogs, catalog folders, categories, products, and SKUs) with specific registered sites. The Sites property on an asset's General tab in the Details pane shows you which registered sites this catalog belongs to.
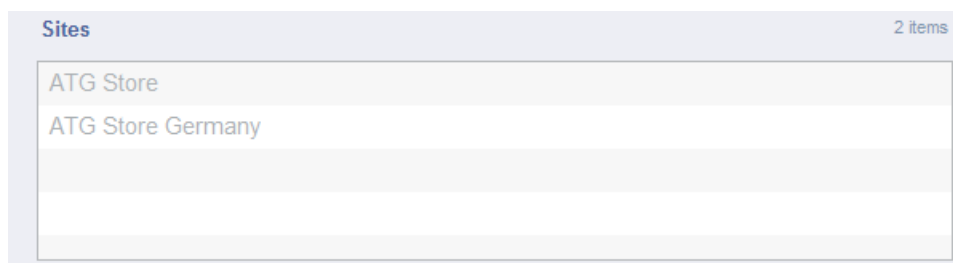
You cannot directly edit the Sites property for a Catalog asset, but you can associate assets with different registered sites by linking or moving them. See Linking and Unlinking Assets (page 29) and Moving Assets (page 32). You can, however, directly edit the Sites property for a Promotion. See Sites Tab (page 127) for more information.

Working with Asset Properties

As you work with assets, you will need to create and edit their property values in the Details pane. Merchandising includes a number of property editors that you use to add and edit asset properties.

Note: For information about working with the light table property editor, see Organizing Collections with the Light Table (page 53).

Working with Text Editors

A text editor lets you work with short, unformatted strings, such as product names.

To add or edit text in a text editor, complete the following steps:

1. Click the editor.

2. Type or paste text into the box.

3. (Optional) Set other property values in the Details pane.

4. Click the Create or Save button at the bottom of Details pane when you have finished your changes.

Working with Large String Editors

A large string editor lets you edit and apply rich-text formatting to large string properties, such as a product's default long description.
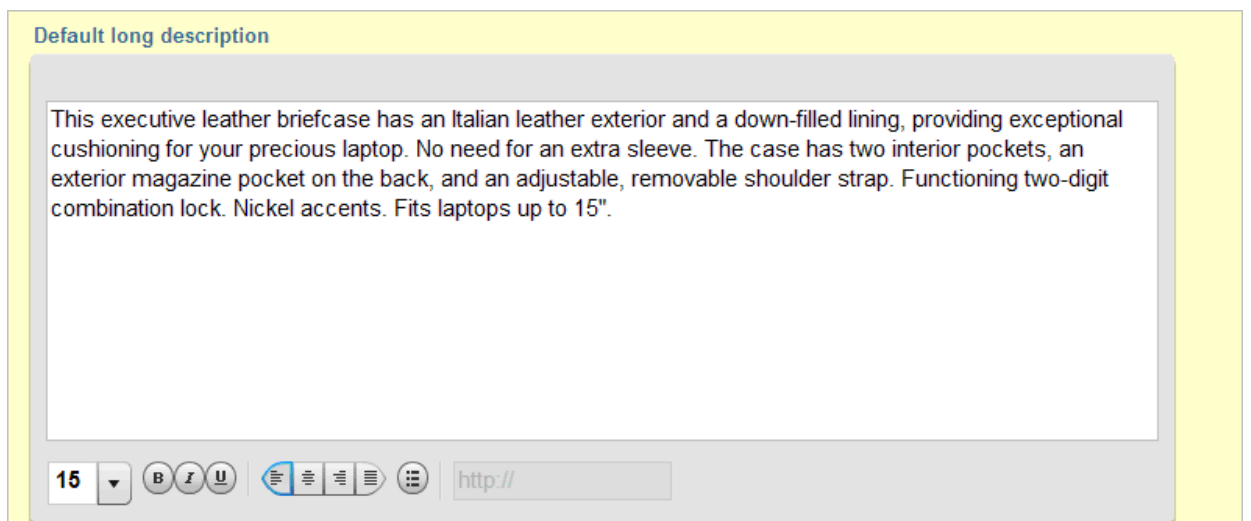
To add or edit text in the large string editor, complete the following steps:

1. Click the editor.

2. Type or paste text into the box.

    If you paste in formatted text, the formatting is not preserved.

3. Use the icons at the bottom of the editor to format, size, and align the text:

    • Font Size: Set the font size for large string property content

    • Emphasis: Bold, Italics and Underline

    • Alignment: Left Justified, Centered, Right Justified or Block

    • Bullets: Add a bulleted list to a large string property

4. (Optional) Set other property values in the Details pane.

5. Click the Create or Save button at the bottom of Details pane when you have finished your changes.

Working with Collection Editors

A collection editor lets you work with collection properties, such as a category's list of fixed child products. You can add and remove assets from a collection, edit existing assets in the collection, or change the order of assets in the collection.

Merchandising includes editors for ordered and unordered collections. Each asset in an ordered collection has a specific position in the collection.

An unordered collection can be a simple list of assets, like a catalog's root categories, or a map of key-value pairs, like the translations that appear on a product's Advanced tab when Commerce Reference Store is installed. The items in unordered collections appear in alphabetical order in Merchandising and you cannot reorder them.

To work with assets in a collection editor, complete the following steps:

1. Click the editor to activate it.

2. Perform one of the following tasks:

3. Click the Save button at the bottom of the Details pane when you finish your changes.

Creating New Assets in a Collection

Creating a new asset from a collection editor automatically adds the asset to the project.

To create a new asset in a collection, complete the following steps:

1. In the collection editor, click the + button and fill in the property fields in the window that appears. See for more information.

2. Click Create.

   The new asset appears as the first item in the collection. In an unordered collection or map, saving your changes reorders the collection alphabetically.

Adding Existing Assets to a Collection

Adding assets to a collection automatically adds them to the project.

To add existing assets to a collection, complete the following steps:

1. In the collection editor, click the Select button and use the Navigation pane window that appears to browse to or search for assets.

   The new assets appear at the top of the collection. In an unordered collection or map, saving your changes reorders the collection alphabetically.

2. Alternately, you can drag existing assets from the Navigation pane and drop them in the collection editor.

If you drag assets to an ordered collection, a horizontal line appears at a potential drop location when you hover over it.

If you drag assets to an unordered collection, the new assets appear at the top of the collection. Saving your changes reorders the collection alphabetically.

Editing Assets in a Collection

Editing assets in a collection editor automatically adds them to the project.

To edit an asset in a collection, complete the following steps:

1. In the collection editor, click the asset's Display Name and fill in the property fields in the window that appears. See Creating New Assets (page 27) for more information.

2. Click Save.

Removing Assets from a Collection

Removing an asset from the collection does not remove it from the system. Removing an asset from a collection automatically adds it to the project.

To remove an asset from a collection, complete the following steps:

1. In the collection editor, remove one or all asset from the collection:

   • To remove one asset, click the X at the end of the asset row.

   • To remove all assets from the collection, click Clear All.

Reordering Assets in a Collection

Each asset in an ordered collection has a specific position in the collection. Reordering a collection does not add the reordered assets to the project.

To change the order of assets in a collection, complete the following steps:

1. To move an asset to a new position in the collection, change the number in the Order column and click the Reorder button.

   Enter a number from 1 to the number of assets in the collection. If the number you enter is greater than the number of assets in the collection, Merchandising moves the asset to the end of the list.

2. To move an asset to the top of a collection, click the arrow icon at the beginning of the asset's row.
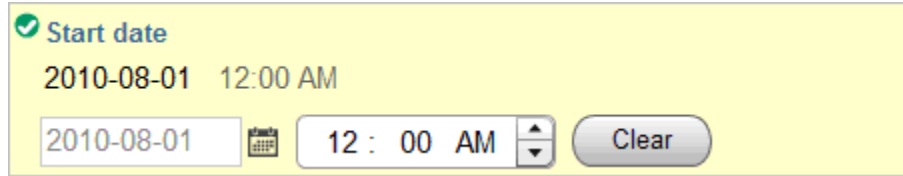
You can also drag one or more assets to a new position in the list:

1. Select one or more assets in the collection editor. If you select multiple assets, they do not have to be contiguous.

2. Drag the assets to a new position in the collection and drop them. (A horizontal line appears at a potential drop location when you hover over it.)

   Merchandising automatically changes the order numbers to reflect the reordered collection.

Working with Calendar Editors

A calendar editor lets you work with date and time properties, such as a start and end dates.

To set date and time, complete the following steps:

1. Click the editor.

2. Click the calendar icon and select a date.

3. (Optional) If the editor also includes a time, use the up and down arrows to set the hour, minute, and AM/PM portions of the time.

   If a time editor is available and you do not specify a time, when you save your changes, Merchandising saves the time as the system time on your computer; that is, the computer where you are accessing Merchandising through a web browser, not the publishing server where Merchandising is installed.

4. (Optional) Set other property values in the Details pane.

5. Click the Create or Save button at the bottom of Details pane when you have finished your changes.

Using Multi Edit

Multi Edit lets you apply the same change to multiple assets at the same time. For example, you could use Multi Edit to:

• Add products to the Clearance category on a weekly basis.

• Activate a New Color flag for a newly-added group of shoe SKUs and deactivate the flag for older SKUs.

• Add the phrase "New for Fall!" to the beginning of the long description for a list of products.

You can use Multi Edit with catalog assets, promotion folders, promotions, coupons, and media assets. You cannot use Multi Edit with price lists, sites, site groups, facets, Search Merchandising assets, or targeting and segmentation assets.

Adding Assets to Multi Edit Operations

To modify assets in bulk, you must add them to the workbench. Once you add assets to the workbench, Merchandising automatically assigns them to Multi Edit operations, based on asset type. For example, products are added to one operation while SKUs are added to another.

Adding assets to the workbench does not add them to a project. Assets are added to a project only when they are successfully updated as part of a Multi Edit operation.

Note: Multi Edit operations are automatically removed from the workbench when you log out of the Business Control Center or your session expires.

To select assets for a Multi Edit operation:

1. In the Find or Browse panel, select the assets you want to edit. See Using the Navigation Pane (page 18) for details. For Multi Edit operations, child assets are not automatically selected.

2. Click the Actions button in the toolbar and select Add to Multi Edit.
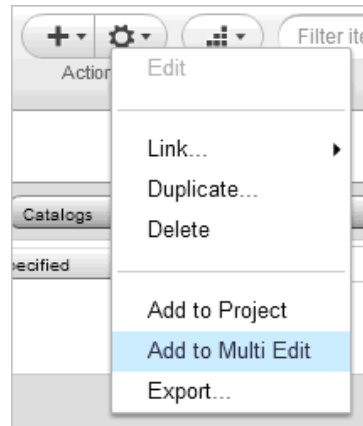
   Alternately, you can drag the selected assets to the Workbench. For more information, see Using Drag and Drop in Merchandising (page 48).

   The Workbench expands and displays one or more Multi Edit tiles. Each tile represents a Multi Edit operation. If you selected different types of assets, Merchandising automatically adds them to separate Multi Edit operations. For example, if you drag both products and SKUs to the workbench, two Multi Edit tiles appear; one contains the products and one contains the SKUs.

   Each Multi Edit tile shows the number and type of assets available for the operation.

3. (Optional) You can add and remove assets any time before you run the operation.

   • To add more assets, repeat steps 1 and 2. The tile automatically updates to reflect the new number of assets in the operation.

   • To remove an asset, open the Multi Edit tile. In the Assets list, click its X icon next to the asset to remove.

   • Removing all the assets in the list also removes the tile from the workbench.

4. (Optional) To remove a tile from the workbench, move the mouse pointer over the tile until an X appears in its upper-right corner. Click the X.

   If you remove a tile for an operation that has not yet run, the assets are not updated or saved.

Once you have added assets to a Multi Edit operation, you can start editing properties. See the next section, Editing Assets in a Multi Edit Operation (page 45), for more information.

Editing Assets in a Multi Edit Operation

Multi Edit applies your change to the property for all items in the Assets list. Multi Edit does not change the values of properties you do not specifically edit.

The same restrictions that apply to editing properties individually also apply to Multi Edit operations. For example, you cannot edit read-only properties, like a product's Sites collection, or properties that your profile's roles do not allow you to view or edit. Additionally, you cannot use Multi Edit to change the following asset properties:

- Properties (other than strings) that must be unique. You can prepend or append text to a unique string property.

- The following Promotions properties: Template, Condition and offer, Promotion upsells

- The following Coupon Batch properties: Code prefix and Number of coupons

- Coupon IDs for Coupons

- The following Stacking Rules properties: Stacking rule combinations and all properties on the Promotions tab

- The following Products and SKUs properties: All properties on the Price Lists tab

- Cascade-delete properties that are single references to other assets or collections of other assets

To edit assets in a Multi Edit operation, follow the steps below:

1. Add the assets you want to update. See Adding Assets to Multi Edit Operations (page 43) for more information.

2. Double-click the tile to open the Multi Edit window.

    The window is divided into two parts: A list of assets in this operation is on the left and the Details pane for assets of this type is on the right.
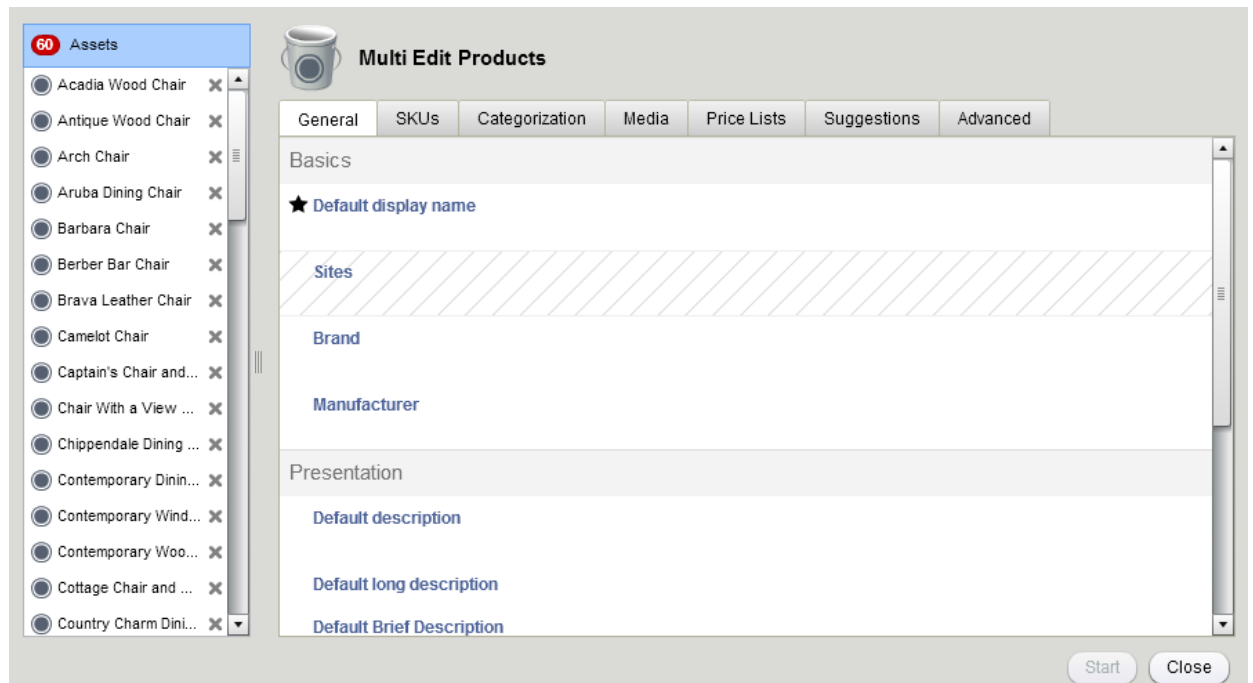
3. Click a property editor in the Details pane and select the type of change you want to make.

- No Change: Leaves the property's current value unchanged. This is the default selection for all property editors.

- Prepend: Adds your change to the beginning of the existing property value

    For example, you could add the phrase "20% off!" to the beginning of the Default Display Name or add five SKUs to the beginning of the Fixed Child SKUs collection.

- Replace: Replaces the existing property value with your change

    For example, you could replace an existing Fixed Child Products collection with other products you select or new products you create.

- Append: Adds your change to the end of the existing property value

    For example, you could add the phrase "Buy 2 get 1 free" to the end of the Default Display Name or add five products to the end of the Fixed Child Products collection.

- Erase: Removes the existing property value. This option is not available for all properties, for example, it is not available for required properties.

4. Specify a property value, unless you selected Erase in the previous step. For details about using each type of property editor, see Working with Asset Properties (page 39).

5. Click Close to close the window and make more changes later or click Start to run the Multi Edit operation.

    When you close the window, any changes you made are saved in the Multi Edit tile as long as the tile is available in the workbench.

    For information about starting the operation, see the next section, Running a Multi Edit Operation (page 46).

Running a Multi Edit Operation

Once you finish editing properties, run the Multi Edit operation to apply your changes and save them, which automatically adds them to the project. Assets that could not be modified are added to the project.

To run a Multi Edit operation:

1. Open the tile whose Multi Edit operation you want to start.

2. Click Start.

    The Multi Edit window closes and Merchandising starts the operation. A progress bar appears on the tile.

    You can continue working in Merchandising while a Multi Edit operation runs.

3. (Optional) To cancel the operation, click the Stop icon at the top-right in the Multi Edit tile.

    If the operation includes relatively few assets or updates, it might complete before you can stop it. In this case, the easiest way to undo the changes is to remove the assets from the current project. For more information, see Removing Assets from a Project (page 8).

    You cannot undo changes made by a Multi Edit operation.

4. When the operation finishes, you can open the tile and view the results. For more information, see the next section, .

Viewing Multi Edit Reports

When a Multi Edit operation completes, its tile changes to reflect the status of the operation. If all assets were successfully updated, the tile displays a check mark. If some or all assets could not be updated, the tile displays a warning icon. Open the tile to view a report that displays the results of the operation.

To view a Multi Edit report:

1. Open the Multi Edit tile whose report you want to view.

   The report is divided into a number of categories, each on its own tab.

   • Failed. These assets were not changed, saved, or added to the project because the suggested edits cased errors. Each asset on the Failed tab is followed by a description of the problem that caused the failure.

   • Updated. These assets were successfully changed, saved, and added to the project.

   • Unchanged. These assets already had the suggested property values so no change was necessary. These assets were not saved or added to the project.

   • Cancelled. The Multi Edit operation was stopped before Merchandising could update these assets. These assets were not changed, saved, or added to the project.

   The report includes tabs only for categories that have assets in them. For example, if all assets were successfully updated, the report contains only the Updated tab.

2. To fix assets that appear on the Failed or Cancelled tab, copy and paste their IDs from the report to the in the Navigation pane, then search for them.

   You can edit the assets one at a time from the search results list, or add them to a new Multi Edit operation.

3. When you finish reviewing the report you can remove it from the workbench permanently by clicking the X in the upper-right corner of its tile.

You cannot move assets to the Workbench while it still contains a Multi Edit report for assets of the same type. To start a new Multi Edit operation, select the type of assets to add and click the Start New Multi Edit button.

Start a new Multi Edit for these asset types?
You will no longer have access to the last report for any checked asset types.

☑ Products

Start New Multi Edit

Cancel

Using Drag and Drop in Merchandising

You can drag and drop assets in Merchandising to simplify moving, linking, and adding actions. For example:

- Drag a number of products from the Find panel to the Workbench for a Multi Edit operation.

- Add one or more assets to a collection. For example, add several products to a category by dragging the products from the Search Results list in the Find panel to the Fixed Child Products collection of the category currently displayed in the Details pane.

- Change the order of assets in a collection by dragging one or more selected assets to a new position in the list.

- Drag a product currently displayed in the Details pane to a different category in the browse panel to move the product to that category.

- Replace a product's thumbnail image by dragging an image file from the Media folder in the browse panel to the product's Thumbnail image property in the Details pane.

- Link several categories in one catalog to a catalog on a different site by dragging them in split-screen view.

- Add or replace an asset in a single-reference property editor. For example, drag a category template from the Media folder in the Browse panel to the Template property editor of the category currently displayed in the Details pane.

To drag and drop assets:

1. (Optional) Click the splitter button in the lower left-hand corner of the Merchandising window to show a second view of Merchandising.

2. Find or browse to assets you want to work with. See .

3. Select the assets to drag.

   By default, dragging assets moves them. To link instead of move, select the assets and press the CTRL key.

   Note: You cannot link promotions, coupons, and media assets.

4. Drag the assets to the new location and release the mouse button to drop them.

   A highlight appears around a potential drop location when you hover over it.

5. To stop the current drag action, press the ESC key or simply release the mouse while the curser is not on a drop target.

5 Working with Visual Merchandising

Visual Merchandising lets you select assets to organize and edit directly from a preview session. As with any changes you make in Merchandising, all changes you make with Visual Merchandising become part of a project so other users cannot see the changes until they are published.

Visual Merchandising Basics

The following are some key terms that you need to be familiar with when you work with the Visual Merchandising:

• **Layout view** is an editable preview session that is available when both preview and Visual Merchandising are configured in your environment. For more information, see UI Overview (page 49).

• **Light table** is a visual collection editor that you use to reorder a category's fixed child products list. For more information, see Organizing Collections with the Light Table (page 53).

Before You Begin

Visual Merchandising provides a more visual, intuitive way to organize assets and select them for editing. Although the light table and layout view look and behave different from the traditional Merchandising user interface, the underlying functionality is the same. For example, reordering a collection with the light table or in the collection editor in a product's Details pane yields the same result.

This chapter describes how to use Visual Merchandising but does not describe other Merchandising functionality they help you access, such as projects or preview. Refer to the appropriate sections of this guide to learn about Merchandising concepts and features.

UI Overview

This section provides an overview of the main elements of the Merchandising layout view, an editable preview session that is available when both preview and Visual Merchandising are configured in your environment. As with any ATG preview session, layout view lets you preview assets so you can see how your changes will appear on your live Web site. Layout view is interactive, letting you select assets to edit, organize, and add to projects and automatically displaying your changes.

Display layout view by clicking the Layout button at the top of the Merchandising page.
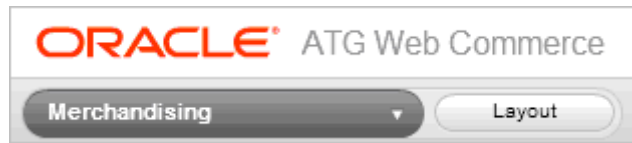
When the layout view is displayed, the Layout button is replaced by the Data button. To close layout view and return to Merchandising, click the Data button.
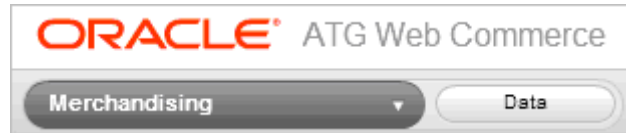
Selecting Assets in Layout View

Right-clicking a category, product, or SKU in layout view displays a pop-up menu with the following options:

- **Edit** displays the Details pane for the selected asset, where you can edit it as you normally would in Merchandising. See Editing Assets (page 52) for more information.

- **Light Table** launches the light table, where you can organize a category's products. See Organizing Collections with the Light Table (page 53).

- **Add to Project** adds the selected asset to the current project. See Adding Assets to a Project (page 7) for more information.

Right-clicking anything else in layout view displays your browser's right-click menu, which is not controlled by Merchandising. For example, in the following illustration, the browser menu appears when you right-click a promotion in layout view.

When you right-click a category, product, or SKU, the name and type of the selected asset appear in the lower-left corner of your screen. This prompt helps you confirm the selected asset is the one you expect. For example, in the following illustration, the prompt shows that the product Tumbler Glass is selected in layout view.
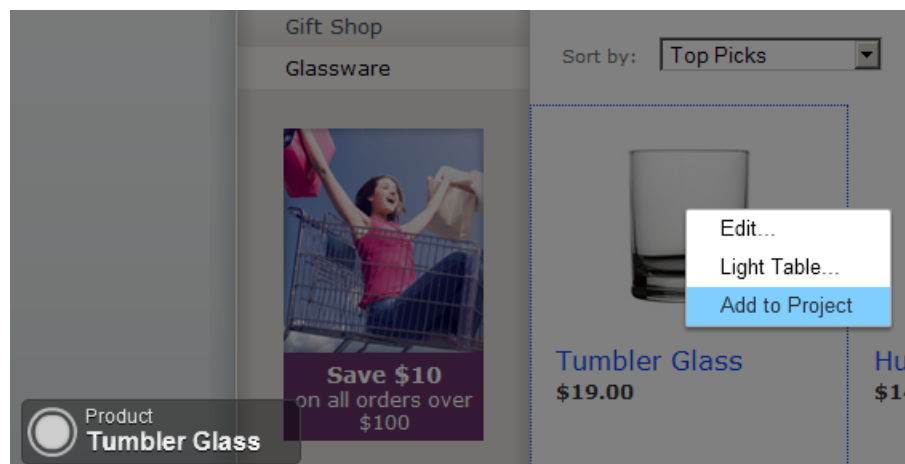
Editing Assets

In layout view, you can select a product, category, or SKU, then edit it as you normally would in Merchandising. You can also add a selected asset to the current project. For details about selecting assets to edit, see UI Overview (page 49).

Adding Assets to a Project

You can add a category, product, or SKU to the current project in layout view. For more information about assets in a project, see Project Basics (page 5).

To add a category, product, or SKU to the current project, complete the following steps:

1. Click the Layout button.

2. Right-click an asset and select Add to Project from the pop-up menu.

Editing Assets

You can select a category, product, or SKU in layout view and then edit it as you normally would in Merchandising. When you save your changes, they are automatically displayed in layout view. For more information about editing assets, see *Creating and Managing Assets* (page 27).

To edit a category, product, or SKU, complete the following steps:

1. Click the Layout button.

2. Right-click an asset and select Edit from the pop-up menu.

    The Details pane for the selected asset appears in a separate window.
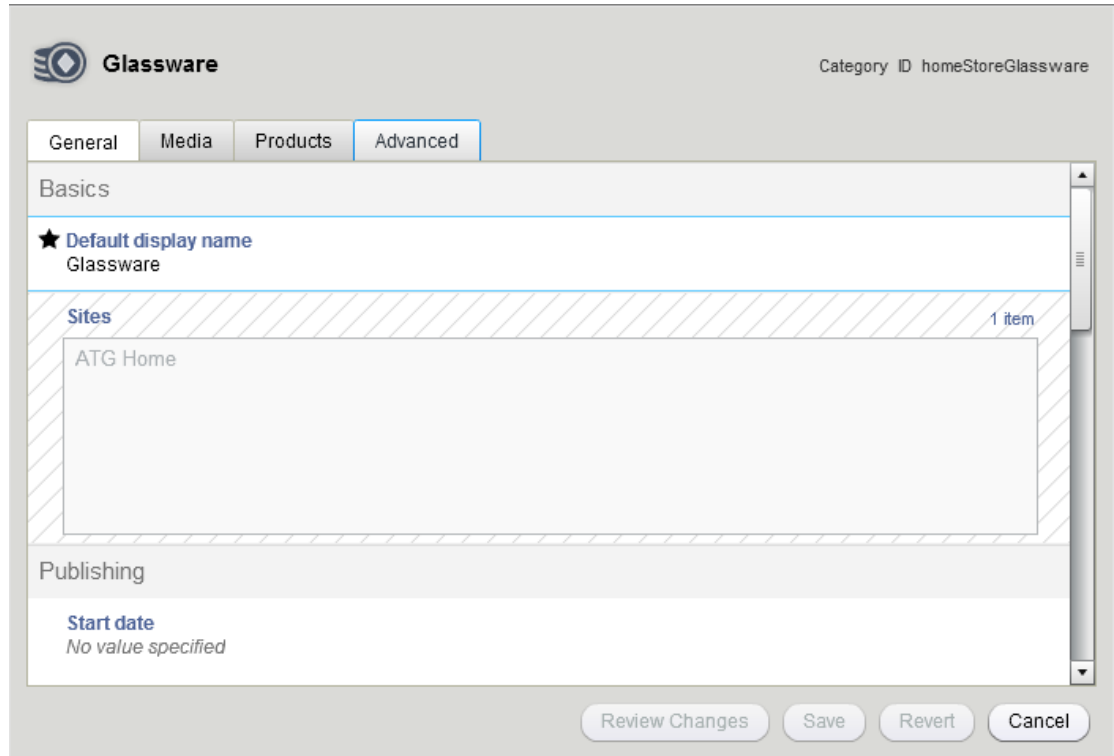
3. Make, review, and save your changes. See *Creating and Managing Assets* (page 27) for more information.

   Layout view automatically updates to display your changes.

Organizing Collections with the Light Table

The light table is a type of property editor that you use to organize a category's fixed child products collection. Artists and photographers use light tables to illuminate and organize media like photograph negatives and artwork for publication. Similarly, you use the light table in Merchandising to organize products in a category using product images.

In the following illustration, the light table shows the fixed child products collection for a category called Glassware:
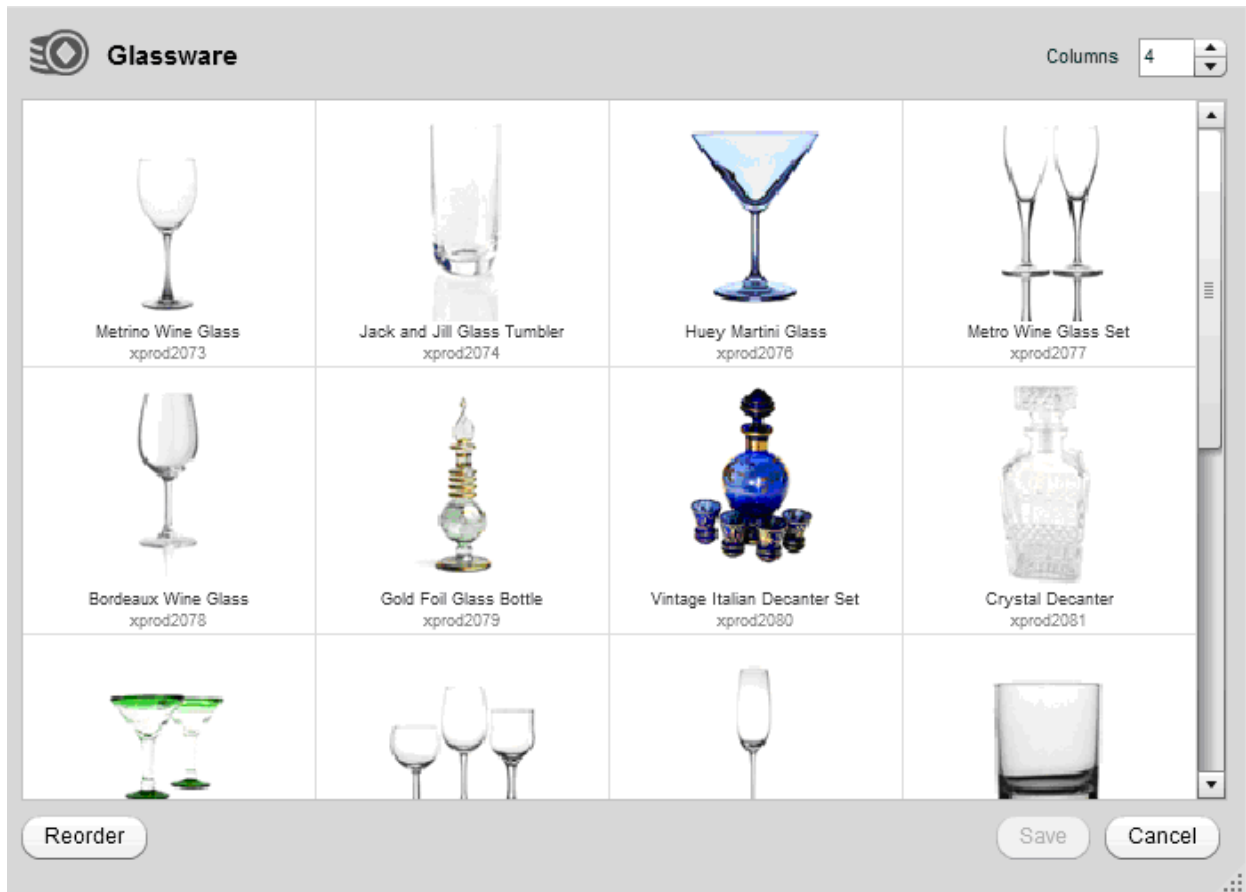
Each tile represents a product in the collection. Move your mouse pointer over a tile to see controls you use to reorder or remove the product.

You can use the light table to reorder a category's fixed child products collection and remove products from it. To work with other types of collections or perform other tasks on the fixed child products collection, edit the asset in the Merchandising Details pane. For more information, see Working with Collection Editors (page 40).

Displaying the Light Table

To display a category's products in the light table, complete the following steps:

1. Click the Layout button.

2. Right-click an asset and select Light Table from the pop-up menu:

- If you click a category, the light table displays the fixed child products for that category.

- If you click a product, the light table displays the fixed child products for that product's parent category. If the product has more than one parent category, select the category to display and click Select in the dialog that appears.
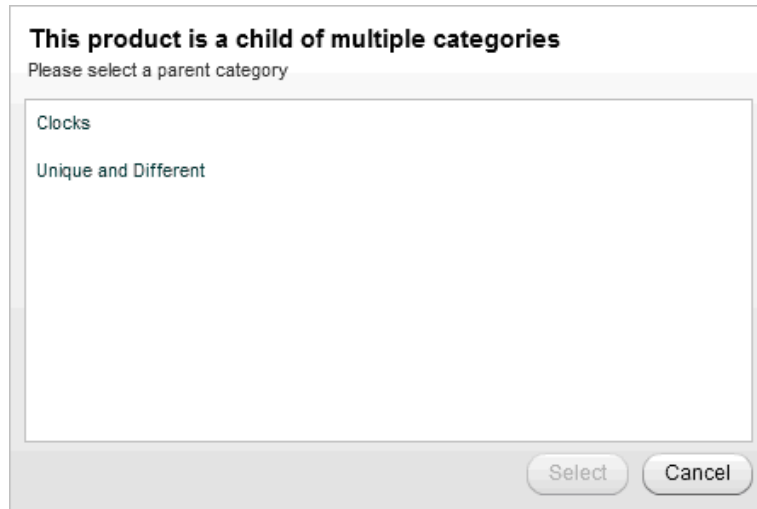
Troubleshooting

These tips might help if you find that right-clicking an asset does not display the light table:

- If the Light Table option is visible but disabled when you right-click an asset, your access rights might not be set to let you view and change the asset. Contact your administrator.

- If you see your browser's right-click menu when you right-click an asset, try clicking again, this time carefully positioning the pointer directly over the asset. If this behavior persists, contact your administrator.

Customizing the Light Table

You can customize the look of the light table by changing its size and the number of columns it displays. These changes remain in effect for the duration of your ATG session (unless you change them again) but are not saved when you log out.

To customize the light table, complete the following steps:

1. Display the light table. See Displaying the Light Table (page 54) for details.

2. To change its size, click and drag the lower-right corner.
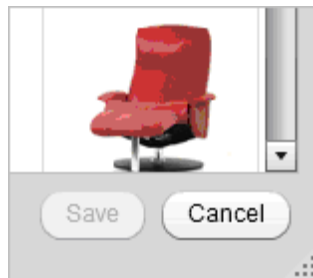
Your administrator can set a minimum size for the light table. You cannot make the light table smaller than its specified minimum size.

3. To change the number of columns, click the up and down arrows in the Columns control. The light table automatically updates based on your selection.

Your administrator can set the minimum and maximum number of columns you can display in the light table. You cannot select more or fewer columns than the specified minimum or maximum number.

4. Click Save if you also made asset changes you want to save. You can also click Cancel to close the light table and save only its new size and number of columns.

Removing Products from Parent Categories

Removing a product from a collection does not remove it from the system but does automatically add it to the project.

To remove a product from a category, complete the following steps:

1. Display the light table. for details.

2. Click the X icon in the upper-right corner of the product's tile.

3. Click Save.

Reordering Collections

Each product in a category's Fixed Child Products collection has a specific position in the collection. The page coding in many web sites, for example, the Commerce Reference Store application, uses the position to control the order in which products appear on the category pages.

To reorder a category's fixed child products category, complete the following steps:

1. Display a category's products in the light table. See for details.

2. To move a product to a new position in the collection, change the number in the upper-left corner of the product's tile and click Reorder.

Enter a number from 1 to the number of products in the collection. If the number you enter is greater than the number of products, Merchandising moves the product to the end of the list.

3. To move a product to the top of a collection, click the arrow icon in the upper-left corner of the product's tile.

4. Click Save.

You can also drag one or more products to a new position in the light table:

1. Display a category's products in the light table. See Displaying the Light Table (page 54) for details.

2. Select one or more products in the light table. If you select multiple products, they do not have to be contiguous.

3. Drag the assets to a new position in the collection and drop them. A vertical line appears at a potential drop location when you hover over it.

   Merchandising automatically changes the order numbers to reflect the reordered collection.

4. Click Save.

6   Creating and Managing Catalog Folders

You can use catalog folders to organize catalogs. Catalog folders are used only in Merchandising and other ATG administrator user interfaces; they do not appear on the Web sites themselves.

While you are developing your catalog, you may want to create a temporary structure using catalog folders to organize assets that you are not ready to add to the catalog hierarchy, but want to see in the Browse panel.

Creating Catalog Folders

You can create catalog folders in the following locations:

*   In a multisite environment, at the top level of a site

*   Inside another catalog folder

To create a new catalog folder:

1. In the Browse panel, navigate to the top level of a site or another catalog folder.

2. Click the Create button in the toolbar and select Catalog Folder.

3. Fill in the property fields in the Details pane. Only the Name field is required.

4. Click Create.

    If you create the folder from the Find panel and do not specify a Parent Folders property on the General tab in the folder's Details pane, Merchandising creates the new folder at the top level.

Catalog Folder Properties

You can work with the following catalog folder properties in the Details pane. The properties described in this section are the catalog folder properties that come with Merchandising by default. Your administrator might have added new catalog folder properties that are specific to your Web sites.

General Tab

Property	Description
Name	The name for the folder. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Sites	In a multisite environment, the names of the sites to which the catalog folder belongs. This property is read-only. See Assets in a Multisite Environment (page 38).
Description	A short description for the folder.
Child Folders	A list of folders this folder contains.
Child Catalogs	A list of catalogs this folder contains.
Parent Folders	Folder that contains this folder. If empty, this folder is a root folder. This property is read-only. To change this folder's parents, move it, link it, or unlink it.

Moving Catalog Folders to the Top Level

The easiest way to move a nested folder to the root of the hierarchy is to split the Merchandising screen and drag the nested folder to the root. See Using Drag and Drop in Merchandising (page 48) for more information.

Deleting Catalog Folders

To delete a catalog folder at the root, you must view the project and delete it from there. See Removing Assets from a Project (page 8) for more information.

If you delete a catalog folder that contains another catalog folder, the child folder is moved to the top level of the catalog hierarchy.

7   Creating and Managing Catalogs

A catalog organizes your commerce assets in a hierarchy that reflects the way users will navigate to them on your Web sites. Catalogs are parents to two types of assets: categories and other catalogs. A catalog contained within another catalog is sometimes called a subcatalog, though it is technically just a catalog, with the same available properties as its parent.

To learn how to import an existing catalog into Merchandising, see *Importing and Exporting Assets* (page 87).

Creating Catalogs

To create a new catalog:

1. In the Browse panel, navigate to the top level of a site, a catalog folder, or another catalog. See Using the Navigation Pane (page 18) for more information.

   Note: You can also create a catalog from the Find panel when Catalog is selected in the For dropdown menu. This creates the catalog in the Uncategorized Items or Unsited Items list.

2. Click the Create button in the toolbar and select Catalog.

3. Fill in the property fields in the Details pane. The Name field is the only required field.

4. Click Create.

Catalog Properties

You can work with the following catalog properties in the Details pane. The properties described in this section are the catalog properties that come with Merchandising by default. Your administrator might have added new catalog properties that are specific to your Web sites.

General Tab

Property	Description
Name	Name used for the catalog in other ATG applications. The catalog name is a required property, but if you do not supply one here, ATG automatically creates one for you. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Sites	In a multisite environment, the names of the sites to which the catalog belongs. This property is read-only. See Assets in a Multisite Environment (page 38).
Root categories	List of the top-level categories in the catalog.
All root categories	List of all the root categories in the catalog, including those in any subcatalogs. This property is read-only.
Sub catalogs at root	List of catalogs whose root categories are also root categories of the catalog. (for use in combining catalogs).
Enclosing catalogs	Parent catalogs, if this catalog is a subcatalog.

Facets Tab

The Facets tab displays information about facets associated with this category. You cannot edit properties directly on the Facets tab. Click the Edit button at the top of this tab to go to the Facets UI, where you can create and manage facets. For details about working with facets, see *Defining Facets* (page 165).

8   Creating and Managing Categories

Categories organize your catalog into a hierarchy that provides a navigational framework for your Web sites. Categories can be parents to catalogs, products, or other categories.

A category can be either the child of one or more other categories or a root category. A root category is a starting point in the navigational structure of the catalog. A catalog can contain more than one root category, but only one can be the navigation root. For example, a catalog could contain the following root categories:

- Commerce Root Category, which contain all the catalog's categories, products, and SKUs.

- Non-Navigable Root Category, which contains assets that can be purchased but are not included in navigation, like gift wrapping.

See Category Properties (page 63) for more information.

Note: A category can directly belong to multiple catalogs, making it easier for a category to be part of more than one site in a multisite environment.

Creating Categories

To create a new category:

1. In the Browse panel, select the catalog or category where you want to create the new category. See Using the Navigation Pane (page 18) for details.

   Note: You can also create a category from the Find panel when Categories is selected in the For dropdown menu. This creates the category in the Uncategorized Items or Unsited Items list.

2. Click the Create button in the toolbar and select Category.

3. Fill in the property fields in the Details pane. The Name field is the only required field.

4. Click the Create button at the bottom of the Details pane.

Category Properties

You can work with the following category properties in the Details pane. The properties described in this section are the category properties that come with Merchandising by default. Your administrator might have added new catalog properties that are specific to your Web sites.

General Tab

Property	Description
Default display name	Name used for the category on the site. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Sites	In a multisite environment, the names of the sites to which the category belongs. This property is read-only. See Assets in a Multisite Environment (page 38).
Start date	Date on which the category is available.
End date	Date the category is no longer available.
Default description	Short descriptive text to display with the category.
Default long description	Detailed descriptive text to display with the category.
Template	JSP template used to display the category. For details about working with templates, see *Creating and Managing Media Assets and Folders* (page 79).

Media Tab

Categories, products, and SKUs all have the same set of media properties: a template (on the General tab), thumbnail image, small image, large image, and auxiliary media. Your Web sites may not need all of these properties. For example, at most commerce sites, each SKU would not be displayed in its own template page. More commonly, a product's template page displays all of the child SKUs of the product.

Categories, products, and SKUs all have the same set of media properties to give you as much flexibility as possible when setting up your catalog. For example, you might want to associate certain media items with products rather than SKUs. If SKUs are differentiated by a visible characteristic such as color, you might want to have different image for each SKU, rather than having a single set of images associated with the parent product.

For details about working with Media properties, see *Creating and Managing Media Assets and Folders* (page 79).

Products Tab

Property	Description
Fixed child products	List of explicitly-set child products of this category.

Property	Description
Child products (group)	Name of the content group that contains child products of this category.

Advanced Tab

Property	Description
Sub catalogs	List of catalogs contained by this category. A subcatalog is a catalog whose root categories are child categories of this category.
Fixed related categories	List of explicitly-set categories related to this category.
Related categories (group)	Name of the content group that contains categories that are related to this category.
Parent categories for catalog	Parent category in the context of the current catalog.

Facets Tab

The Facets tab displays information about facets associated with this category. You cannot edit properties directly on the Facets tab. Click the Edit button at the top of this tab to go to the Facets UI, where you can create and manage facets. For details about working with facets, see *Defining Facets* (page 165).

9   Creating and Managing Products

A product is a navigational end-point in the catalog, for example, a fitted sheet or a pair of loafers. Products can be parents of SKUs.

Creating Products

To create a new product:

1. In the Browse panel, select the category where you want to create the new product. See Using the Navigation Pane (page 18) for details.

    Note: You can also create a product from the Find panel when Products is selected in the For dropdown menu. This creates the product in the Uncategorized Items or Unsited Items list.

2. Click the Create button in the toolbar and select Product.

3. Fill in the property fields in the Details pane. The Name field is the only required field.

4. Click the Create button at the bottom of the Details pane.

Product Properties

You can work with the following product properties in the Details pane. The properties described in this section are the product properties that come with Merchandising by default. Your administrator might have added new product properties that are specific to your Web sites.

General Tab

Property	Description
Default display name	Name used for the product on the site. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.

Property	Description
Sites	In a multisite environment, the names of the sites to which the product belongs.
	This property is read-only. See Assets in a Multisite Environment (page 38).
Start date	Date on which the product is available, if a collection filter is implemented to use this property.
End date	Date the product is no longer available, if a collection filter is implemented to use this property.
Default description	Short descriptive text to display with the product.
Default long description	Detailed descriptive text to display with this product.
Template	JSP template used to display the product.
	For details about working with templates, see *Creating and Managing Media Assets and Folders* (page 79).

SKUs Tab

Property	Description
SKUs	List of child SKUs of this product.
Displayable SKU attributes	List of properties of the product's SKUs that can be displayed by the `DisplaySkuProperties` servlet bean. For example, you could use this bean to display the Default display name and List price properties.
	For more information about this servlet bean, see the *ATG Commerce Guide to Setting Up a Store*.

Categorization Tab

Property	Description
Parent categories	Categories that contain this product.
	See Working with Parent Categories (page 69) for more information.

Media Tab

Categories, products, and SKUs all have the same set of media properties: a template (on the General tab), thumbnail image, small image, large image, and auxiliary media. Your Web sites may not need all of these

properties. For example, at most commerce sites, each SKU would not be displayed in its own template page. More commonly, a product's template page displays all of the child SKUs of the product.

Categories, products, and SKUs all have the same set of media properties to give you as much flexibility as possible when setting up your catalog. For example, you might want to associate certain media items with products rather than SKUs. If SKUs are differentiated by a visible characteristic such as color, you might want to have different image for each SKU, rather than having a single set of images associated with the parent product.

For details about working with Media properties, see *Creating and Managing Media Assets and Folders* (page 79).

Price Lists Tab

Price Lists allow you to target a specific set of prices to a specific group of customers. For example, price lists can be used to implement business to business pricing where each customer can have its own unique pricing for products based on contracts, RFQs and pre-negotiated prices. For details about working with the Price Lists tab, see Working with Product Prices (page 70) later in this chapter.

Suggestions Tab

Property	Description
Fixed related products	Static list of products related to this product.
Related products (group)	Name of the content group that contains the list of dynamic related products.
Dynamic related products	List of the products in the content group specified by the Related products (group) property. This property is read-only.
Related products	List of all products that are children of this product. This property is read-only.

Advanced Tab

Property	Description
Default keywords	Words that cause a search to return this product.

Working with Parent Categories

Parent categories are those immediately above the product in the hierarchy. For example, Accessories might be the parent category of the product Shoulder Bag. Linked products have multiple parent categories. For example,

If you link the Shoulder Bag product to the Women's Gifts category, its parent categories are now Accessories and Women's Gifts.

The Parent Categories editor on the Categorization tab displays and lets you add or remove a product's parent categories.

Merchandising populates the Parent Categories editor depending on the task you perform:

- When you create a product in the Browse panel, the Parent Categories editor is automatically populated with the category that was selected when you created the product.

- When you create a product in the Find panel, or when a product is imported with no parent category information (such as products imported on a feed), the Parent Categories editor is empty.

- When you move, link, or unlink a product, the categories displayed in the Parent Categories editor are automatically updated to reflect the new parents.

You can also manually add or remove parent categories. See Working with Collection Editors (page 40) for more information.

Working with Product Prices

The information on the Price Lists tab in a product's Details pane reflects the price lists that have been set up by your administrator. You can change the price type and, if applicable, specify a price for the product.

Note: See *Creating and Managing Price Lists* (page 149) to learn how to perform more extensive price list configuration in the Price Lists view.

The Price Lists editor displays each price list that applies to a product and lets you edit each list's Price Type for the product.

To change the price for a product:

1. Navigate to a the Price Lists tab on a product's Details pane.

2. In the Price Lists editor, click the price list you want to edit.

3. Select an option from the Price Type list:

    *   Inherit: The product price is specified by the price list. This is the default value.

    *   Override: Overrides the inherited price for this product with one you specify in the Product Price column.

    *   Volume: Substitutes the list's price for this product with a volume pricing scheme that you specify by clicking the Set volume pricing… button in the Product Price column. See *Creating and Managing Price Lists* (page 149) to learn about volume pricing.

4. Click the Save button at the bottom of the Details pane.

10 Creating and Managing SKUs

A SKU (stockkeeping unit) represents a purchasable instance of a product on a site. Customers do not actually purchase products, they purchase SKUs. A product can have several different SKUs associated with it, representing varieties, sizes, and colors. For example, the product Hoodie Sundress, which is available in two different colors and five sizes, has ten associated SKUs, one for each size/color combination. SKUs have no child assets.

Usually, a SKU represents a single item, such as "blue shirt in size medium." A configurable SKU represents something that is sold as a single item but has variable components, such as a computer system or a bicycle.

Creating SKUs

To create a new SKU or configurable SKU:

1. In the Browse panel, select the product you want to associate with a new SKU. See Using the Navigation Pane (page 18) for details.

   Note: You can also create a SKU from the Find panel when SKUs is selected in the For dropdown menu. This creates the SKU in the Uncategorized Items or Unsited Items list.

2. Click the Create button in the toolbar and select SKU or Configurable SKU. Depending on how your Merchandising installation is configured, additional types of SKUs might be available.

3. Fill in the property fields in the Details pane. The Name field is the only required field.

4. Click the Create button at the bottom of the Details pane.

SKU Properties

SKU properties are used for display purposes, in a similar way to products and category properties. The properties are also used to integrate with other ATG Commerce systems, such as pricing and fulfillment.

You can work with the following SKU properties in the Details pane. The properties described in this section are the SKU properties that come with Merchandising by default. Your administrator might have added new SKU properties that are specific to your Web sites.

General Tab

Property	Description
Default display name	Name used for the SKU on the site. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Sites	In a multisite environment, the names of the sites to which the SKU belongs. This property is read-only. See *Assets in a Multisite Environment* (page 38).
Start date	Date on which the SKU is available, if a collection filter is implemented to use this property.
End date	Date the SKU is no longer available, if a collection filter is implemented to use this property.
Default description	Short descriptive text for display with the SKU.
Template	JSP template used to display the SKU. For details about working with templates, see *Creating and Managing Media Assets and Folders* (page 79).
Parent products	Products that contain this SKU. This property is read-only. To change this SKU's parents, see *Creating and Managing Products* (page 67).

Media Tab

Categories, products, and SKUs all have the same set of media properties: a template (on the General tab), thumbnail image, small image, large image, and auxiliary media. Your Web sites may not need all of these properties. For example, at most commerce sites, each SKU would not be displayed in its own template page. More commonly, a product's template page displays all of the child SKUs of the product.

Categories, products, and SKUs all have the same set of media properties to give you as much flexibility as possible when setting up your catalog. For example, you might want to associate certain media items with products rather than SKUs. If SKUs are differentiated by a visible characteristic such as color, you might want to have different image for each SKU, rather than having a single set of images associated with the parent product.

For details about working with Media properties, see *Creating and Managing Media Assets and Folders* (page 79).

SKU Pricing Tab

Property	Description
List price	Default price of the SKU before any discounts or promotions.
On sale	Boolean (yes/no) property that indicates if the item is on sale.
Sale price	Price of the SKU if the On Sale property is set to Yes.
Wholesale price	Wholesale price of the SKU.

Price Lists Tab

Price Lists allow you to target a specific set of prices to a specific group of customers. For example, price lists can be used to implement business to business pricing where each customer can have its own unique pricing for products based on contracts, RFQ and pre-negotiated prices. For details about working with the Price Lists tab, see Working with SKU Prices (page 77) later in this chapter.

Advanced Tab

Property	Description
Bundle links	List of SKU links that make up a SKU bundle. If this property editor is empty, the SKU is not a bundle.
Derived catalogs	Used to determine if an end user has permission to view this SKU. This property is read-only.
Dynamic attributes	Additional configurable attributes of the SKU, specified as a key/value pair for each attribute you define. For example, you could specify the key/value pair color/red or size/small.
Fulfiller	Fulfiller who will ship the item.
Replacement products	Products to suggest as replacements if the item is out of stock.

Creating SKU Bundles

SKU bundles are SKUs composed of several other SKUs. Bundles allow a group of items to be purchased as a single item but treated as multiple items in order fulfillment. Bundles differ from configurable SKUs in that the component SKUs of a bundle are always the same. For example, a SKU bundle could consist of six #2 pencils and a pencil case.

Creating a SKU bundle is a three-part process:

1. Create the individual SKUs that the SKU bundle is composed of.

2. Create SKU links from the SKUs. A SKU link consists of an individual SKU and a quantity.

3. Create a SKU whose Bundle links property consists of one or more SKU links.

For example, suppose you want to create a SKU bundle that consists of six #2 pencils and a pencil case:

1. Create a SKU that represents a #2 pencil, and create another SKU that represents a pencil case.

2. Create a SKU bundle by creating a new SKU that will contain links to the Pencil SKU and the pencil case SKU.

3. In the SKU bundle, create a SKU link that represents six of the #2 pencil SKUs, and create another SKU link that represents one of the pencil case SKUs.

Creating a SKU Bundle

Once you have created one or more SKUs to associate with SKU links, you can create a SKU that combines the links:

1. Create a new SKU, as described earlier in this chapter.

2. On the Advanced tab in the Details pane, click the Bundle Links property.

3. Click the + button to create a new link.

4. In the New SKU Link dialog box, enter the following required properties:

    Name: A descriptive name for the SKU link.

    Item: The SKU to associate with this link. You can select an existing SKU or create a new SKU.

    Quantity: The number of Items to include in this bundle.

5. Click Create to create the new SKU link and close the dialog box.

6. Repeat steps 3 through 5 for each new SKU link you want to create.

7. Click Save to save your changes to the SKU bundle.

Creating Configurable SKUs

While a regular SKU represents a single item, such a size medium blue shirt, a configurable SKU represents an object that is sold as a single item, but has variable components, such as a computer system for which a shopper can select the amount of memory and hard-disk size. You create a configurable SKU the same way as a regular SKU, but you must add configurable properties to it.

To add a new configurable property to a configurable SKU:

1. Create a new Configurable SKU, as described earlier in this chapter.

2. On the General tab in the Details pane, click the Configurable Properties property.

3. Click the + button to create a new configurable property.

4. In the New Configurable Property dialog box, enter the following required properties:

   Name: A descriptive name for the property.

   Configuration Options: Specify a product, if this configurable option will represent a product, or specify a SKU if this option will represent a SKU.

5. Click Create to create the new configurable property and close the dialog box.

6. Repeat steps 3 through 5 for each new configurable property you want to create.

7. Click Save to save your changes to the configurable SKU.

Working with SKU Prices

The information on the Price Lists tab in a SKU's Details pane reflects the price lists that have been set up by your administrator. You can change the price type and, if applicable, specify a price for the SKU.

Note: See *Creating and Managing Price Lists* (page 149) to learn how to perform more extensive price list configuration in the Price Lists view.

The Price Lists editor displays each price list that applies to a SKU and lets you edit each list's Price Type for the SKU.

To change the price for a SKU:

1. Navigate to the Price Lists tab on a SKU's Details pane.

2. In the Price Lists editor, click the price list you want to edit.

3. Select an option from the Price Type list:

   • Inherit: The SKU price is specified by the price list. This is the default value.

   • Override: Overrides the inherited price for this SKU with one you specify in the SKU Price column.

   • Volume: Substitutes the list's price for this SKU with a volume pricing scheme that you specify by clicking the Set Volume Pricing… button in the SKU Price column. See *Creating and Managing Price Lists* (page 149) to learn about volume pricing.

4. (Optional) A SKU can be a child of more than one product. To set a different price for the same SKU under different products, repeat step 3 for each Price Type / Price in product name column pair that appears in the Price Lists editor.

5. Click the Save button at the bottom of the Details pane.

11 Creating and Managing Media Assets and Folders

Media assets are assets that typically have content, such as a URL pointing to a Web page, a JSP template, or a block of product copy that is managed by Merchandising. In technical terms, media assets are ATG Commerce assets that are stored in a content repository.

You can work with the following types of media assets:

- Media-internal-text assets store blocks of text. For example, a line of text displayed by a slot on your Web site might be stored as a media-internal-text asset.

- Media-internal-binary assets store binary files, such as images or PDFs. For example, an image of a product might be stored as a media-internal-binary asset.

- Media-external assets store URLs that point to files, such as text or binary files, that are stored outside the catalog database. For example, a JSP template used for all products might be stored as a media-external asset.

You organize media assets in media folders. Media folders are required, that is, a media asset cannot exist outside a media folder. Before you create your media assets, decide how you want to organize them and create an appropriate folder structure.

Creating Media Folders

Before creating media assets and folders, consider how you want to organize them. For example, you can organize them by subject matter or asset type. You can create media folders at the top level of Media & Content or inside another media folder:

To create a new media folder:

1. In the Browse panel, navigate to Media & Content. See for details.

2. Click the Create button in the toolbar and select Media Folder.

3. Fill in the property fields in the Details pane. Only the Name field is required.

4. Click the Create button at the bottom of the Details pane.

Media Folder Properties

You can work with the following media folder properties in the Details pane. The properties described in this section are the media folder properties that come with Merchandising by default. Your administrator might have added new media folder properties that are specific to your Web sites.

Properties Tab

Property	Description
Name	The name for the folder. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Description	A short description for the folder.
Parent Folder	Folder that contains this folder. If no value is displayed, this folder is a root folder.
Path	Complete pathname of the folder.
Creation date	Date this folder was created.
Start date	Date this folder becomes available.
End date	Date this folder will no longer be available, if a collection filter is implemented to use this property.

Creating Media Assets

To create a new media asset:

1. In the Browse panel, navigate to Media & Content. Select the folder where you want to create the new asset. See Using the Navigation Pane (page 18) for details.

   Note: You can also create a media asset from the Find panel when Media is selected in the For dropdown menu. This creates the media asset in the Uncategorized Items or Unsited Items list.

2. Click the Create button in the toolbar and select one of the following:

   • Media – External

   • Media – Internal – Binary

   • Media – Internal – Text

3. Fill in the property fields in the Details pane. Required fields are marked with a star icon.

4. Click the Create button at the bottom of the Details pane.

Media-External Properties

You can work with the following properties in the Details pane. The properties described in this section are the properties that come with Merchandising by default. Your administrator might have added new properties that are specific to your Web sites.

General Tab

Property	Description
Name	The name for the media asset. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Description	A short description for the asset.
Parent Folder	Folder that contains this asset. This property is required.
Path	Complete pathname of the asset. This property is read-only.
URL	Relative URL that can be used in a JSP page to access the media asset. This property is required.

Media-Internal-Text Properties

You can work with the following properties in the Details pane. The properties described in this section are the properties that come with Merchandising by default. Your administrator might have added new properties that are specific to your Web sites.

General Tab

Property	Description
Name	The name for the media asset. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Description	A short description for the asset.

Property	Description
Data	The text that comprises the asset.
	This property is required.
Parent Folder	Folder that contains this asset.
	This property is required.
Path	Complete pathname of the asset.
	This property is read-only
Creation date	Date and time the asset was created.
	This property is read-only.

Media-Internal-Binary Properties

You can work with the following properties in the Details pane. The properties described in this section are the properties that come with Merchandising by default. Your administrator might have added new properties that are specific to your Web sites.

General Tab

Property	Description
Name	The file name of the media asset, including extension, such as .JPG, .GIF, or .PNG.
	This property is required.
Description	A short description for the asset.
Data	The data that comprises the asset.
	This property is required.
Parent Folder	Folder that contains this asset.
	This property is required.
Path	Complete pathname of the asset.
	This property is read-only.
Creation date	Date and time the asset was created.
	This property is read-only.
Mime type	The content type value for the asset.
	This property is read-only.

Deleting Media Folders

If you delete a media folder that contains another folder, the child folder is moved to the top level of the Media & Content hierarchy.

12 Creating and Managing SEO Tags

Web search engines base their rankings of pages partly on the words that appear in certain HTML tags, particularly `<meta>` tags and the `<title>` tag. A common search engine optimization (SEO) technique is to list key search terms in those tags to raise the ranking of the pages for those terms. SEO tags are items whose properties are used to set the content of the `<title>` and `<meta>` tags of site pages. SEO tags, and the values to use for their properties, are described in detail in the *ATG Platform Programming Guide*.

To create an SEO tag:

1. In a Manage Commerce Assets project, navigate to SEO Tags. See Using the Navigation Pane (page 18).

2. Click the Create New button, and select SEO Tags from the dropdown menu.

3. In the Content Key text box, enter an identifier to use for looking up the item.

4. In the Description text box, enter text describing the content of the page.

5. In the Keywords text box, enter a list of search keywords for the page.

6. In the Title text box, enter text to be used as the title of the page.

7. In the Display Name text box, enter a display name to be used for the item.

8. Click Create.

   The new item displays in the Navigation pane.
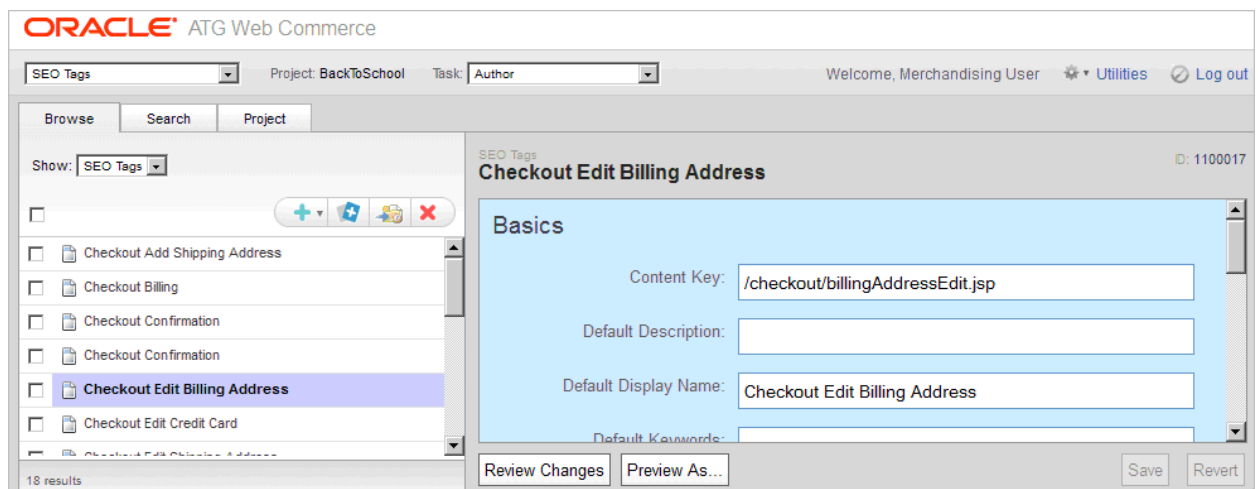
13 Importing and Exporting Assets

You can export ATG Commerce assets so you can work with them outside of Merchandising and easily import those changes back into the ATG system. For example:

• If new catalog information arrives on an automated feed, you can format and edit the new assets in bulk and import them into your catalog.

• If you receive updates from a number of people, you can incorporate all the changes into Merchandising at once instead of manually entering each change.

• You can quickly make bulk edits or perform global operations (like search and replace or spell-checking) on catalog assets in a spreadsheet and then import those changes back into your catalog.

• You can distribute asset information for review to people who do not have access to Merchandising.

Exporting Assets

You can export catalog assets and their properties to a file in XLS (Microsoft Excel) or CSV (Comma Separated Value) format. You can then use a spreadsheet editor, such as Microsoft Excel, to view and edit property values. Before beginning the export, you can use the preview option to display the first few rows of the spreadsheet and review your selections.

Export Guidelines and Limitations

This section provides information that helps you plan your export.

Asset Types Not Available for Export

Merchandising does not export the following types of assets:

• Price lists and price list folders

• Facets

• Base search configurations, search configurations, and search configuration folders

• Search tests

Exporting Asset Properties

When you export an asset, you can export any of its properties that have the following data types:

- `string`

- `big string`

- `list`, `set`, and `map` collections of strings and repository items

    Note: Arrays are not supported.

- `date`

- `timestamp`

- `int`

- `long`

- `float`

- `double`

- `enumerated`

- `boolean`

- repository items

For more information about property data types, see the chapters that describe creating and working with different asset types earlier in this guide.

Asset Versioning

You do not have to add assets to a project to export them, but you do have to be working in the context of a project.

If you select an asset for export that you modified in your project, the modified version is exported. Otherwise, the main version—the version last checked in—is exported.

Note: Versioning information is not included in the export. If you plan to edit and re-import the spreadsheet to Merchandising, see Versioning Considerations (page 93).

Security

You must have Read and List access for assets and properties you want to export. You do not need Write access to export assets but you do need Write access to import changes to assets and properties. For more information about user permissions, contact your administrator or see *Managing User Access and Security* in the *ATG Content Administration Programming Guide*.

Exporting in a Multisite Environment

In a multisite environment, each catalog asset is assigned the following properties:

- Sites: Defines site membership for the asset.

- Parent Category

Merchandising does not export either of these properties for catalog items, but does export the Sites property for promotions.

Export Size Limitations

- The maximum number of asset rows is 65,534

The maximum number of asset rows that can be exported to a single spreadsheet is 65,533. Microsoft Excel has a maximum row limit of 65,536, and the first two rows of the exported spreadsheet are reserved for information about the export. If you export more than 65,534 assets, or you choose to itemize a collection property and the total number of items for all exported assets exceeds 65,534, any assets or collection items above that limit are not included in the spreadsheet. A message appears warning you that the data has been truncated.

- The maximum number of characters in a cell is 32,767

  Microsoft Excel does not allow more than 32,767 characters in a single cell. You could encounter this limit for any very long property value, but it is most likely to be an issue when you export very large collection properties, for example, a list of 2,000 SKU IDs that are greater than 15 characters each. In this case, use itemized format. See .

Exporting Different Types of Assets

You can export only one type of asset in each export procedure. For example, you cannot export both products and categories to the same spreadsheet; you would need to export the products to one spreadsheet and then export the categories to another.

Some asset types are children of other asset types. For example, Configurable SKU is a type of SKU and Item Discount is a type of Promotion.

If you choose to export a parent asset, all its child assets are automatically exported. For example, suppose your project includes two types of promotions: an order discount and a shipping discount. If you choose to export all available promotions, the asset type list displays the parent asset type (Promotion) and each child asset type (Order Discount and Shipping Discount).
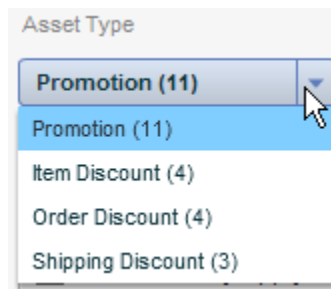
To export only order discounts, select Order Discount from the list. To export both order discounts and shipping discounts, select Promotion from the list.

If you select Promotion to export both types of promotions, only properties that apply to the Promotion asset type are available for export. Properties that apply specifically to the Order Discount or Shipping Discount asset type are not available. For example, the Condition and offer property is not available for export when you select the Promotion asset type, but it is available when you select either Order Discount or Shipping Discount.

Options for Exporting Collection Properties

You can export supported collection properties, such as lists, sets, and maps, in either of the following formats:

- Flat: all collection items are listed in one cell and separated by commas

- Itemized: each collection item is listed in a separate row

For instructions, see .

Items in map collections contain key/value pairs that map one thing to another. To represent these items, the key and the value are separated by an equals sign, for example, `Alabama=AL,Alaska=AK`.

Flat Format

In flat format, each row of the spreadsheet represents a single asset with all of its exported properties. This format allows you to export multiple properties for each asset. Individual values in a collection are separated by a comma, for example, `blue,green,red`, or a comma and a space if they are repository items, for example, `cat110006, cat11008, cat11009`.

The following table shows how the `childSKUs` collection property appears in flat format:

ID	displayNameDefault	childSKUs
xprod1068	Wool waist tie top	xsku1448, xsku1449
xprod2525	Metallic silk blend tank top	xsku2525_1, xsku2525_2

Note: If collection items contain only numbers, or contain a comma in a value, the items are enclosed in double quotation marks, for example, `"123","124"`. This prevents Microsoft Excel from interpreting the list of numbers as a single number. If a value contains a comma, the double quotation mark indicates that the comma does not begin a new item. For example, a keyword collection could be exported as: `winter accessories,"hats, scarves, and gloves",knitted gifts`. The quotation marks are removed if you re-import the spreadsheet.

Itemized Format

In itemized format, collection items are separated into individual rows, so one asset might span several rows in the spreadsheet. If you choose to itemize a collection property, you can only select that one property for export.

The following table shows the products from the previous example with the `childSKUs` property in itemized format:

ID	childSKUs
xprod1068	xsku1448
xprod1068	xsku1449
xprod2525	xsku2525_1
xprod2525	xsku2525_2

Exporting Asset Data

Follow these steps to export asset data to a spreadsheet:

1. In a Manage Commerce Assets project, select the assets you want to export. You can select any assets from the Navigation pane or select assets in the current project from the project dialog box.

   If you choose to export assets that you have modified in your project, the property values from the version in your project are exported instead of the values from the main version. For more information, see Asset Versioning (page 88).

2. In the Action menu, click Export.

3. If you selected more than one type of asset for export, click the Asset Type list and select which type you want to export. You can choose only one.

   If you choose a parent type, any assets of its child types are also exported. To export only assets of a child type, select it from the list instead of the parent type. For more information, see Exporting Different Types of Assets (page 89).

4. In the Properties list, select the properties you want to include in the export. The ID property does not appear because it is always exported. Collection properties appear in brackets.

   Note: If you do not choose any properties, only the ID is exported. You could use this as a starting point for creating a spreadsheet for import. See Importing Assets (page 92).

5. Select the format for the export file (XLS or CSV).

6. (Optional) To export a collection property with its contents itemized into rows, select the property and click Show Collections in Separate Rows. You can choose only one property. For more information, see Options for Exporting Collection Properties (page 89).

7. (Optional) To preview the exported data, click Preview.

   A sample of the exported data appears showing the first five rows of the spreadsheet. You can modify your Asset Type and Properties selections and click Preview again.

8. Click Export.

   Once you click the Export button, the operation cannot be cancelled and you cannot work on other Merchandising tasks until the export is complete.

9. When the export is complete, your browser displays a dialog where you choose to open or save the export file.

   If you click Cancel in this dialog, the export file is not saved and you will need to repeat the export procedure.

Viewing the Exported Data

Asset data is exported to an XLS or CSV file that can be viewed and edited using a spreadsheet program such as Microsoft Excel. The default file name follows the format `<YYMMDDhhmmss>export.xls|csv`. For example, a CSV file exported January 30, 2011 at 11:43:27 AM is named `110130114327export.csv`.

The exported data follows a specific format that can be used to re-import the spreadsheet to Merchandising. The following figure shows an example:

	A	B	C
1	/atg/commerce/catalog/ProductCatalog:product		TIMEFORMAT=MM/dd/yyyy HH:mm:ss
2	ID	displayNameDefault	endDate
3	xprod2525	Metallic silk blend tank top	01/31/2009 23:59:00
4	xprod1068	Wool waist tie top	04/02/2009 01:00:00

Row One: Repository, Asset Type, Formatting Options, and Process Messages

The first row is reserved for the repository path and asset type, any formatting options, and any warning or error messages.

- The first column of row one (cell A1) contains the repository path and the asset type separated by a colon. For example: `/atg/commerce/catalog/ProductCatalog:product`

- Columns two through four (cells B1, C1, D1, and E1) contain data formatting options:

   `FORMAT=itemized` indicates that the spreadsheet contains a collection property in itemized format and appears in the second column (cell B1), if applicable.

   If any exported properties contain timestamps, `TIMEFORMAT` appears in the third column (cell C1) and shows the format used for dates with a time stamp, for example, `TIMEFORMAT=MM/dd/yyyy HH:mm:ss`.

   If any exported properties contain dates, `DATEFORMAT` appears in the fourth column (cell 1D) and shows the format used for date values, for example, `DATEFORMAT=dd/MM/yyyy`.

- Messages generated during export processing appear in the fifth column (cell E1), for example "Data exceeds Excel 65535 row limit and was truncated."

Row Two: Property Headings

The second row displays column headings that contain the property names of the exported properties. The ID property is always the first column (cell A2) and is always labeled "ID" regardless of the actual repository name of the ID property. The remaining columns are alphabetical by display name, the same order that is used in the Export dialog.

Note: Unlike the Export dialog, the spreadsheet contains the repository name of the property and not the localized display name.

Rows Three and Greater: Asset Data

Asset data begins in the third row and continues for the remainder of the spreadsheet. If an asset does not have a value for a property, the corresponding cell is blank.

Importing Assets

The import feature lets you work with commerce assets outside of Merchandising and import them, in spreadsheet or CSV format, into Oracle ATG Web Commerce. Importing provides a convenient method for editing assets in batches. You can use the editing features of a spreadsheet application to modify multiple assets and then import all of your changes to an Merchandising project at once.

The import feature is not designed to support an import of your entire catalog, but is best used to edit or add a relatively small number of assets, on the order of thousands, not tens of thousands.

Follow these steps to import assets from a spreadsheet into Merchandising:

1. Create a spreadsheet in the correct format for importing to Merchandising. The supported file types are CSV and XLS. For more information see Exporting Assets (page 87) and Formatting a File for Import (page 93).

2. Load the file and validate that the assets can be imported. For more information, see Validating and Previewing Assets (page 97).

3. Import the spreadsheet. For more information, see Importing Asset Data (page 99).

4. Review the outcome of the import for any errors or warnings. For more information, see Reviewing the Import Final Report (page 100).

5. Review the assets in your project. Revert any changes that you do not want to keep and resolve any version conflicts that might exist. See Removing Assets from a Project (page 8) and Resolving Conflicts with Other Projects (page 10) in Chapter 4.

Import Guidelines and Limitations

This section provides information that helps you plan your import.

Versioning Considerations

You do not have to add assets to a project to import them, but you do have to be working in the context of a project. When you import new and modified assets, Merchandising adds them to your project. Property values for modified assets are updated with the values you import. Unmodified assets are not added to the project.

Merchandising does not export or import asset versioning information. When you export assets that you intend to re-import, be sure that you export the latest version of the asset to avoid accidentally overwriting properties with obsolete values.

If you check out an asset and edit a property value in your project, and then import an updated value for that same property, there is no record of your earlier edits. You can revert changes to the asset, but the properties revert to the values in the main version, not those in your project version prior to import.

Security

To import changes to an asset, you must have Write access for the asset and any changed properties you want to import. Because the export feature requires only list and view privileges, it is possible that you can export an asset but not be able to import that asset. For more information about user permissions, contact your administrator or see *Managing User Access and Security* in the *ATG Content Administration Programming Guide*

Importing Assets in a Multisite Environment

In a multisite environment, each catalog asset is assigned Sites and Parent Categories properties. Merchandising does not import either of these properties for catalog items, but it does import the Sites property for promotions.

Formatting a File for Import

The easiest way to format a file for import is to start by exporting a file from Merchandising that contains the assets you want to modify. You can also manually create the import file starting with a blank spreadsheet. Unlike the export feature, which supports only XLS files, the import feature supports both XLS and CSV formatted files, so you can use any editor that supports CSV files to create the spreadsheet to import.

The following figure shows an example of a spreadsheet formatted for import:

The spreadsheet image shows:

- **Repository and Asset Type** (pointing to cell A1)
- **Format for timestamp properties** (pointing to cell C1)
- **This column will not be imported** (pointing to column C header area)

	A	B	C	D	E
1	/atg/commerce/catalog/ProductCatalog:product		TIMEFORMAT=MM/dd/yyyy HH:mm:ss		
2	ID	displayNameDefault	IGNORE	&fixedRelatedProducts	startDate
3	xprod1007	Braided leather belt	Perfect for your jeans or trousers, this leather belt does it all.		11/01/2008 01:00:00
4	xprod1008	Front buckle bag	Add another element of trendy to your outfit with this embroidered handbag.	xprod1048, xprod1056	11/01/2008 01:00:00
5	NEW	Pearl earrings		xprod1011	01/31/2009 01:00:00
6	xprod1011	Pearl necklace	Made of genuine hand picked freshwater pearls, this is the perfect piece of jewelry for absolutely any outfit.		11/01/2008 01:00:00

- **This row creates a new product** (pointing to row 5, cell A5)
- **These products will be added to the collection** (pointing to column D)

Caution: If you leave a cell blank, a property value might be deleted. See Format for Deleting Property Values (page 96).

Required Formats for Importing a Spreadsheet

The first row and first column of the spreadsheet are reserved for use by the import process and must contain specific information. The first row contains information about the data that is being imported and the first column (except for row 1) contains the ID property of the assets being imported.

In the first row of the spreadsheet, you must specify the repository, asset type, and any special formats for data types, as follows:

- The first column of row one (cell A1) must contain the Nucleus path to the repository component and the asset type of the assets in the spreadsheet, as defined in the repository definition. For example:

```
/atg/commerce/catalog/ProductCatalog:product
```

- Use the additional columns in row one (cells B1 through D1) to specify any special property formatting, such as itemized collections or specific date formats. Each format must be in its own cell, but it does not have to appear in any particular order. The formatting options are:

Description	Format in Spreadsheet	Requirements
Itemized collection property (see Options for Exporting Collection Properties (page 89))	`FORMAT=itemized`	Required when importing a map, list, or set property in itemized format. **Caution:** If an itemized import file does not contain `FORMAT=itemized`, then the import task overwrites the value of the collection property each time it encounters the next value. The last item in the itemized list for a collection will be the only item stored for that collection.

Description	Format in Spreadsheet	Requirements
Format of `date` property values, such as 01/31/2009	`DATEFORMAT=MM/dd/yyyy` The day, month, and year indicators can appear in any order to match your data, for example `dd/MM/yyyy`	Required if any imported properties are of type `date`. The date value must exactly match the format, for example `03/15/2009` instead of `3/15/09`.
Format of `timestamp` property values, such as 31/01/2009 22:45:01	`TIMEFORMAT=` `MM/dd/yyyy HH:mm:ss` The day, month, and year indicators can appear in any order to match your data, for example, `dd/MM/yyyy HH:mm:ss` To use 12-hour time, the format is `MM/dd/yyyy hh:mm:ss aa`, where `aa` can be either AM or PM, for example `03/15/2009 05:30:00 AM`	Required if any imported properties are of type `timestamp`. The timestamp value must exactly match the format, for example `03/15/2009 05:30:00` instead of `3/15/09 5:30`.

Beginning with the second row, the first column of the spreadsheet is reserved for the ID property of the imported assets. No other property can occupy column one. The second row (cell A2) contains the ID heading, which is always ID regardless of the actual name of the repository item's ID property. The remaining rows (cells A3 and greater) contain the ID values for each imported asset. Any rows with blank ID values are skipped during import.

Format for Adding New Assets

The import feature allows you to create new assets when you import your spreadsheet. To create an asset, add a row to the spreadsheet and enter property values for each column. If you leave a cell blank, then the value for that property is set to null. If you leave the ID column blank, the asset is skipped and not created.

You assign an ID value for the new asset in one of the following ways:

• Enter `NEW` in the ID column to let the system create an ID

  The new asset is created using an automatically generated ID. The `NEW` keyword must be typed in all capital letters and must be the only value in the cell.

• Enter a unique ID in the ID column

  A new asset is created with the ID you enter.

Note: To create an asset, you must provide values for required properties.

When you create a new asset for import, be sure to add it before any other assets in the spreadsheet that make use of that new asset. This is because the import task processes the spreadsheet from top to bottom and must create an asset before it can be referenced from another asset. For example, to create a new product and add it to the Related Products property of other products in the spreadsheet, insert the new product row before the rows containing the products that refer to it.

Format for Deleting Property Values

You can delete a property value of an asset when you import the asset to Merchandising. To delete a property value, leave the corresponding cell blank.

Tip: If you delete a cell in the spreadsheet but do not want to delete the property value during import, you can mark the cell as ignored. See Marking Data to Ignore (page 96).

This delete format does not apply when you are adding items to collection properties. If you format a column to prepend or append items to a collection, blank cells are automatically ignored during import (nothing is added or removed from the collection). See Format for Adding Items to a Collection (page 96).

Marking Data to Ignore

When you import a spreadsheet, the file might contain data that you do not want to include in the import, for example, columns with formulas or notes, columns containing a property that you do not want to edit, or blank cells that might cause data to be deleted. To remove these items from the import, you can mark columns (properties), rows (individual assets), or cells (individual property values) to be ignored by the import process.

Use the keyword IGNORE to mark data that you want to ignore during import, as follows:

To ignore this	Do this
Ignore a column of data, such as a single property or extra column	Type the word IGNORE in the column heading (row 2).
Ignore an asset (a single row)	Type the word IGNORE in the ID cell for the asset (column 1).
Ignore a property for an asset (a single cell)	Type IGNORE in the cell.

For data to be ignored, the cell must contain only the single word IGNORE in all capital letters.

Format for Adding Items to a Collection

You can add items to a collection by typing an ampersand (&) before or after the property name in the column heading of a collection property, as follows:

*   Insert the ampersand at the beginning of the heading name to prepend items to the beginning of a collection, for example `&fixedChildProducts`.

*   Insert the ampersand at the end of the heading name to append products to the end of a collection, for example `fixedChildProducts&`.

The prepend and append formats simplify the process of editing collections because you only need to include additional items and not every item in the collection. If you do not use this format, the import process overwrites the collection property with the exact items listed in the spreadsheet.

When you use this format, leave a cell blank to indicate that nothing should be added to the collection. If you have formatted a column to prepend or append items to a collection, blank cells in that column are ignored during import (nothing is added or removed from the collection).

The following figure shows an example of the prepend format used to add products to categories:

	A	B
1	/atg/commerce/catalog/ProductCatalog:category	
2	ID	&fixedChildProducts
3	cat10032	xprod2072,xprod2075
4	cat10018	xprod2072,xprod2075

You can also use prepend and append to add to collections that are in itemized format. The following graphic shows the previous example in itemized format:

	A	B
1	/atg/commerce/catalog/ProductCatalog:category	FORMAT=itemized
2	ID	&fixedChildProducts
3	cat10032	xprod2072
4	cat10032	xprod2075
5	cat10018	xprod2072
6	cat10018	xprod2075

If you already use the ampersand character as part of a collection property name, you can use a different character for appending and prepending items to collections.

Formats Specific to CSV Files

The import feature supports files in CSV (comma-separated values) format in addition to XLS (Microsoft Excel) files. CSV files are text-based files that use commas to separate cells in the spreadsheet. Each new line in the file represents a new row of the spreadsheet. If the value stored in a cell includes commas, such as a collection property, the entire value is enclosed in double-quotation marks to indicate that the commas do not begin a new cell.

If you use Microsoft Excel to create the CSV file, the quotation marks are added automatically when you save the file in CSV format. You cannot see them when you open the file in Excel. You see them only if you edit the file in a text editor, such as Microsoft WordPad.

The following shows an example of a CSV file as it appears in text:

```
/atg/commerce/catalog/ProductCatalog:product, , ,
ID,displayNameDefault,parentCategoriesForCatalog,childSKUs
xprod1009,Terry Gloves,masterCatalog=cat70014,"xsku1032, xsku1033, xsku1034"
xprod1012,Cable knit hat,masterCatalog=cat70014,xsku1040
xprod1010,Shoulder Bag,masterCatalog=cat70014,xsku1038
```

The following figure shows the same CSV file as it appears in Microsoft Excel:

	A	B	C	D
1	/atg/commerce/catalog/ProductCatalog:product			
2	ID	displayNameDefault	parentCategoriesForCatalog	childSKUs
3	xprod1009	Terry Gloves	masterCatalog=cat70014	xsku1032, xsku1033, xsku1034
4	xprod1012	Cable knit hat	masterCatalog=cat70014	xsku1040
5	xprod1010	Shoulder Bag	masterCatalog=cat70014	xsku1038

To avoid errors on import, make sure that the number of commas in rows 3 and greater exactly matches the number of commas in row 2.

Validating and Previewing Assets

When you import a file, Merchandising validates the file, first verifying that the file is formatted correctly and contains data that can be imported, then validating the first 200 assets in the spreadsheet. You can also validate

all assets in the file using the Validate All option. If you receive errors or warnings prior to the actual import, you can stop the task, edit the spreadsheet to remove any errors, and then upload the file again.

To view instructions for importing a file, see Importing Asset Data (page 99).

After passing the validation phases and importing the spreadsheet, Merchandising displays the outcome of the import in a results dialog box. See Reviewing the Import Final Report (page 100).

File Validation

When you select a file for import, Merchandising validates the file format and the formats of the first two rows of the spreadsheet. If there is an error in the file, a message appears on the Import dialog.

Errors that can occur during this phase include the following:

• The file is not in XLS or CSV format.

• The repository or asset type in the first column of row 1 is not valid.

• The first row contains `FORMAT=itemized`, but the file does not contain an itemized collection property.

   Caution: If the file is in itemized format but the first row does not contain `FORMAT=itemized`, the file is valid but it will not be imported as an itemized collection. Instead, the import task overwrites the current value each time it encounters the new item for the collection, and the last item is the only value stored.

• The file is missing the `ID` column or it is not the first column.

• Row 2 of the file contains properties that do not exist for this asset type or have a misspelled property name.

• The file contains properties for which you do not have Write permissions.

• The file contains properties that are not allowed. These are: derived, transient, non-readable, non-writable, and non-ui-writable properties. See the *ATG Repository Guide*.

   Note: Merchandising does not export these types of properties, so if the spreadsheet contains them, they were added to it manually.

• The file contains a timestamp or a date property but does not have a corresponding `TIMESTAMP` or `DATE` format in row 1.

Asset Validation

After the file is uploaded and passes file validation, Merchandising validates the first 200 assets and displays the outcome in the Import window.

The validation process determines how many imported assets have changed, how many are new, and how many are unchanged. The preview table lists the status of each validated asset, its ID and imported properties, and marks any values that have errors or warnings. The Status column is blank for items that are unchanged.

To view an error or warning message, place the pointer over the item containing the error or warning.

Errors or warnings that can occur during asset validation include:

• The value in the spreadsheet cannot be converted to the correct type for a property, for example, a date does not include two digits for the month, or a letter or symbol appears in a numeric property.

• A value for a required property is missing.

• A repository ID in a property value cannot be found.

If the unknown ID is for the same type of asset that is being imported, the message is a warning because the asset might be created elsewhere in the spreadsheet. If it is a different asset type, the message is an error.

Note: If the ID column contains a non-existent repository ID, a new asset is created with that ID. See Format for Adding New Assets (page 95).

If your file contains more than 200 assets and you want to validate them all before starting the import process, click Validate All. Otherwise, Merchandising validates any remaining assets as it imports the data and errors or warnings are displayed in the import outcome. See Reviewing the Import Final Report (page 100).

Importing Asset Data

To import asset data into an Merchandising project:

1. Create or open an Merchandising project into which you will import assets. See Project Basics (page 5).

2. Click the Import… button.

3. In the Import dialog, click Browse and locate the XLS or CSV file to import.

4. Click Upload.

   Merchandising validates that the file is formatted correctly.

   • If the file is formatted correctly, it validates and displays the first 200 assets.

   • If the file is not formatted correctly, it displays an error message. Review the error message to determine the cause of the problem, edit the spreadsheet, and return to step 2. See File Validation (page 98).

5. After the file passes validation and the first 200 assets appear in the Import dialog, review the asset preview, and note any errors or warnings.

   • To view the text of an error or warning message, place your pointer over a value that is marked as having an error or warning.

   • If you detect problems in the data, click Cancel, edit your spreadsheet to resolve the issues, and return to step 2.

   Note: Long property values do not display completely in the preview table, however only the display is truncated, and not the value itself. The entire value from the spreadsheet will be imported.

6. (Optional) If the imported spreadsheet contains more than 200 assets and you want to validate the entire spreadsheet prior to import, click Validate All.

   Note: Depending on the size of the spreadsheet, this process could take several minutes to complete.

   The Import dialog displays a preview of the properties that will be imported for each asset and any errors or warnings. The total number of changed, new, and unchanged assets appears at the top of the preview table.

7. When you are satisfied with the preview data, click Import.

Continue to the next section, Reviewing the Import Final Report (page 100), for more information about import results.

The new and changed assets are added to the current project. You can use the Review Changes option to compare the updated property values of an asset to the values in the main version. See Reviewing Changes (page 36).

Reviewing the Import Final Report

After Merchandising imports a spreadsheet, the Import (Final Report) dialog displays the outcome for each asset. The dialog divides the assets into tabs based on the outcome of the import. Each tab lists of assets shows the ID and name of each asset and The possible outcomes are:

- Changed: Shows assets successfully updated with values from the spreadsheet.

- Failed: Shows assets that were not updated during import due to an error.

- New: Shows assets that were created during import.

- Failed New: Shows new assets that could not be created due to an error, such as a missing required property. If you did not supply a new ID in the spreadsheet, then the ID is blank.

- No Change: Shows assets that were not updated because there were no changes to the asset in the spreadsheet. These assets are not added to the project.

The following figure shows an example of the outcome of an import task. Each tab shows the ID and name of each asset:
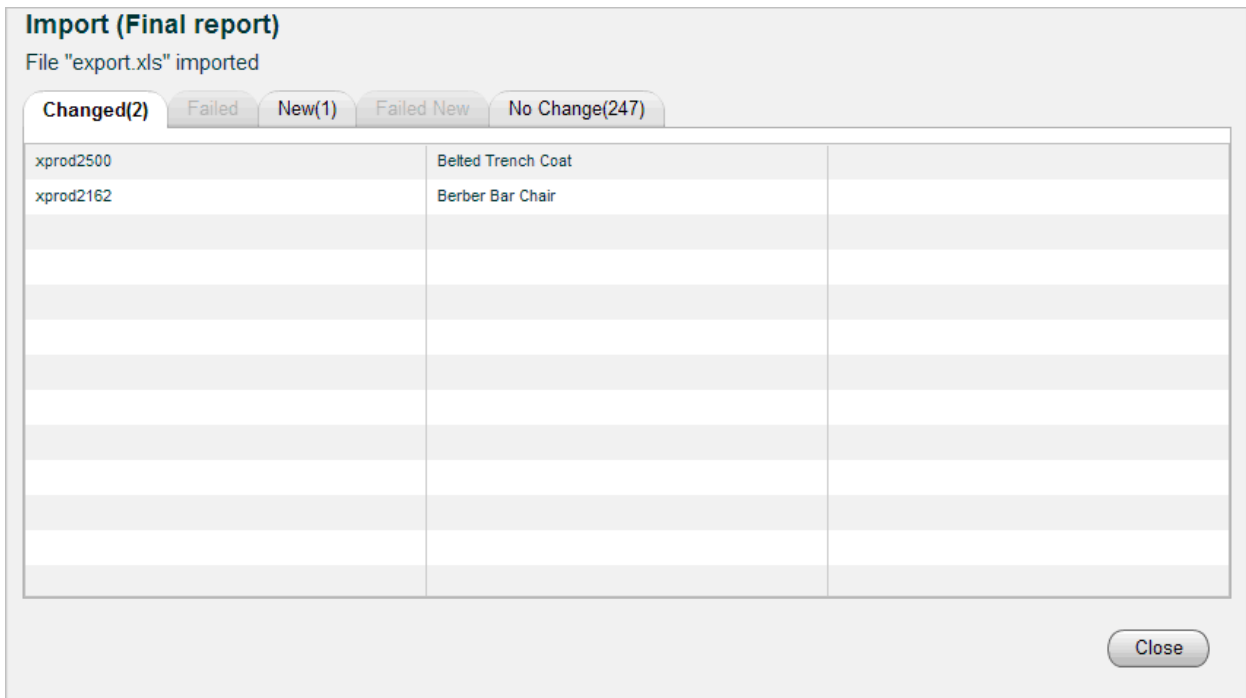
To view the property changes for imported assets:

1. Close the Import (Final report) dialog and navigate to the Project tab.

2. Navigate to an imported asset and display its properties in the Details pane.

3. Click Review Changes.

4. Revert any changes you do not want to keep. See Reviewing Changes (page 36).

To retry the import process for assets that did not import successfully

1. Make note of the errors that prevented successful import and close the Import (Final report) dialog.

2. Edit the spreadsheet to correct the errors.

    Note: Remove any assets marked NEW from the spreadsheet that were already successfully imported. Otherwise, the next time you import the spreadsheet, duplicates will be created. If this happens, remove the duplicate assets from the project. See Removing Assets from a Project (page 8).

3. Import the spreadsheet again. See Importing Asset Data (page 99).

14 Creating and Managing Promotions and Coupons

Promotions and coupons allow you to offer discounts on specific products or groups of products. For example, you might decide to promote a range of products for Mother's Day by highlighting them with an image on your site's "Welcome!" page and offering a 10 percent discount if customers order them by a specific date. Or you might want to e-mail new customers a coupon to encourage return visits.

Promotions specify options that define the conditions a customer must meet before qualifying for the discount, and how the discount is applied. For example, you can specify that a customer must purchase an item from the Outerwear category, that they spend more than $50, or that they make their purchase during July. Coupons make promotions available to customers (assuming the promotion conditions are met) when a user enters a coupon code. Creating a coupon involves associating a coupon code with a promotion. Both promotions and coupons can be organized in folders and found through the same searching and filtering controls used by other Merchandising assets See *Merchandising UI Overview* (page 17) and *Creating and Managing Assets* (page 27).

This chapter describes how to create, edit, and work with promotions in Merchandising. It includes the following sections:

How Promotions Work

Promotions are divided into three general types:

- Item Discount Promotions—The customer receives a discount on an item or items.

- Order Discount Promotions—The customer receives a discount to an entire order.

- Shipping Discount Promotions—The customer receives discounted shipping.

After setting up a promotion in Merchandising, you have several options on how to deliver the promotion to users.

- Create a coupon or batch of coupons that grants the promotion to a user profile. A standard coupon has a single associated code that can be used to claim that coupon, which is often widely distributed to customers (a common example is a coupon that grants free shipping to users during the holidays). For situations in which you want to restrict the use of coupons, use a coupon batch; the coupon batch generates a random authentication code for each individual coupon, to ensure that the coupon cannot be passed on to other customers. (For more information, see Using Coupons with Promotions (page 138) in this guide.)

- Create a scenario that determines the visitors who qualify for the promotion. The scenario tells the system how to determine the people that qualify, and then it marks their visitor profiles accordingly by adding the promotion to their `activePromotions` profile attribute. (For more information, see the *Creating Scenarios* chapter in the *ATG Personalization Guide for Business Users*.)

You can also set up promotions that are provided to all customers automatically– for these, you do not need to set up a scenario or a coupon.

When a customer adds an item to their cart or performs any other action that involves requesting a price from the system, ATG Commerce checks their visitor profile to see whether they currently qualify to receive any of the promotions you have set up. If a customer qualifies, ATG Commerce uses the promotion discounts to calculate the price of the product for the customer, and it adjusts the price accordingly.

You can inform site visitors about promotions in several ways. For example, you could set up a discount for a product without advertising it in any special way; the visitor simply sees the adjusted price when he or she displays the checkout page. You could include some text that describes the offer on, for example, the "Welcome!" page and make that text a link to the regular catalog page for the product. You could use the `GetApplicablePromotions` droplet to identify promotions that apply to particular items, and display this information on the product page. Or you could send an e-mail that describes the promotion, perhaps including a discount coupon code in the message.

Creating Promotions Folders

Promotions folders are used for organizing your promotions. To create a new promotions folder:

1. In the Navigation pane, navigate to Promotions.

2. Click the Create New button, and choose Promotions Folder.
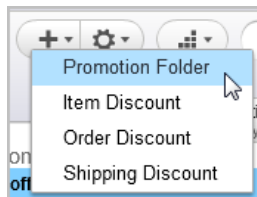
The Details pane displays empty fields you can use to define the promotions folder.

3. Enter a name for the promotions folder in the Name text box (required).

4. Specify the folder's location in the hierarchy by adding, replacing, or removing a parent using the Select button.

A parent is preselected if you see an asset name beside Select. A promotions folder without a parent resides at the top level of the promotions hierarchy.

5. Click Create.

In the Navigation pane, the promotions folder displays.

The Details pane contains the General tab, which shows the properties for the new promotions folder.

Creating Promotions

Merchandising templates provide a quick and easy way to create many common promotion types, such as free shipping and BOGO offers. Like many other assets, promotions use a series of tabs to organize their properties. The sections that follow walk you through each tab and the settings that can be used on them as you create and edit promotions.

To create a new promotion:

1. In a Manage Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Promotions.

4. From the New Item gear select one of the following, depending on which type of promotion you are creating:

    • Item Discount

    • Order Discount

    • Shipping Discount
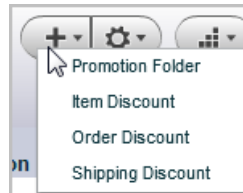
5. Configure the tabs as described in the sections that follow.

6. When you are done with configuration, click Create.

You can also create promotions within a coupon; see Creating Freestanding Coupons (page 139).

General Tab

The General tab provides access to the following promotion settings:

The following table describes the tab's properties:

Property	Description
Promotion Name (required)	A short, descriptive name that will allow you to identify the promotion.
Template	The template provides a starting point for your promotion, and determines what condition and offer options apply. See Condition & Offer Templates (page 109) in this chapter for details on each template.
Condition and Offer	The condition and offer determine how your promotion works: What the qualifying behavior is, what type of discount results, and any exclusions. See Condition & Offer Templates (page 109) in this chapter for details.
Priority	The priority of the promotion. Promotions are applied in order of priority, with low priority numbers applied first. Engines sort the promotions by the value of this property. Note that a promotion's priority is secondary to the promotion type. For example, you can specify how a given Item Discount promotion is applied compared to other Item Discount promotions, but not the order in which Item Discounts are applied compared to Shipping Discounts.
Description	Promotion description.
Enable Promotion Upsells	Indicates whether or not the promotion uses promotion upsells; the default is True. Promotion upsells allow you to notify users when they are close to qualifying for a promotion. For example, you might set up your page to inform the customer that if they spend five more dollars, they qualify for free shipping.
Promotion Upsells	If promotion upsells are enabled, list the upsells available to this promotion. If you are editing an existing promotion, you can click the upsell message to edit the promotion upsell. (See the following table for Promotion Upsell properties.)
Parent Folder	This defaults to the folder in which you created the promotion. You can select a different existing folder or create a new folder in which to store the promotion.
Enabled	Indicate whether or not this promotion can be used with a qualifying order. The default is True, but note that this also depends on any dates you set in the Availability tab. If Enabled is False, the promotion cannot be used regardless of the Availability tab dates.

Promotion upsells include the following properties:

The following table describes the tab's properties:

Property	Description
Message (Required)	Message to display to the customer when the upsell is triggered. For example, "Nearly there!"
Condition (Required)	Condition under which the upsell prompts the customer. For example, if you have a "buy three get one free" promotion on T-shirts, you might want to trigger a promotion upsell with the following condition: "When order contains exactly 2 products in category Tees"
Media	Any media associated with the promotion upsell.
Product Upsell (Optional)	A list of products that can be used as part of closeness qualifier messaging. For example, if you want to promote a line of luggage, you may add them to the product upsell list, then use them in product pages, e-mails, or other communications when a customer is close to qualifying for a promotion. **Note:** If you are creating the promotion upsell within a condition and offer template (such as Buy Item X Get Item Y (page 110)), this field is not visible. It can be accessed on the General Tab.

Condition & Offer Templates

The condition and offer property editor appears on the General tab. Different templates are available depending on the type of promotion; for example, you cannot use the BOGO condition and offer template as part of a shipping promotion.

Although they appear in the same template lists, Gift with Purchase promotions have several unique features that are not shared by other templates, and are discussed separately. See Creating Gift with Purchase Promotions (page 129) for information on this promotion type.

The Advanced Condition & Offer gives you the flexibility to create unique promotions not covered by templates. You can convert any template-based condition and offer to an advanced condition and offer; note, however, that you cannot convert an advanced condition and offer to a template. See Creating Advanced Condition and Offer Statements (page 135).

Note that items with $0.00 price are never allowed to be the target of a promotion. You cannot discount or give as a free gift an item that is already identified as free in the catalog.

BOGO (Buy One Get One)

This popular type of promotion discounts an item when a customer buys a similar item. A common condition is that the customer buys one or more items in a particular category, such as shoes, and receives a discount on a second item in that category.

First, set up the condition parameters:

Property	Description
Number of items to buy	How many items the customer must purchase in order to receive the discount. This quantity must be at least 1.

Property	Description
Item(s) to buy	If you do not want the promotion to apply to all purchases, specify the categories, products, etc. that qualify. You can add additional criteria as needed and combine them in either AND (the purchase must meet all criteria) or OR (the purchase must meet at least one criterion) form.

Next, specify the offer:

Property	Description
Number of items to discount	For a traditional "buy one, get one" promotion, enter 1; for each item the customer purchases, one item is discounted. You can discount any number of items, however, or check Unlimited to apply the promotion to all items once the promotion condition has been met.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item. If the Discount Type is Free, this field is disabled.

Buy Item X Get Item Y

This promotion discounts a specified set of products when the customer purchases another specified item.

First, set up the condition parameters:

The following table describes the condition properties:

Property	Description
Number of items to buy	How many items the customer must purchase in order to receive the discount. This quantity must be at least 1.
Item(s) to buy	If you do not want the promotion to apply to all purchases, specify the categories, products, etc. that qualify. You can add additional criteria as needed and combine them in either AND (the purchase must meet all criteria) or OR (the purchase must meet at least one criterion) form.

To exclude items from the condition (that is, they won't help the customer qualify for the promotion), click the Add Criteria button under the Items to Exclude area.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Number of items to discount	You can discount any number of items, or check Unlimited to apply the promotion to all items once the promotion condition has been met.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

To exclude items from the offer (that is, they will not receive a discount), click the Add Criteria button under the Items to Exclude area.

Buy Within Specified Time Frame Get Item Discount

This promotion discounts a particular item or items when the customer places an order within the specified time period.

First, specify the start and end dates for the condition. In the case of this promotion, these fields are the equivalent of the usage start and end dates; if you change one set of dates, the other set updates automatically.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Number of items to discount	You can discount any number of items, or check Unlimited to apply the promotion to all items once the promotion condition has been met.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

To exclude items from the offer (that is, they will not receive a discount), click the Add Criteria button under the Items to Exclude area.

Get Item Discount (by Product, Category, Brand, etc.)

This promotion discounts a specific set of products, which could include a single item, a category, a brand, etc. The discount has no other conditions, although you can specify that it be applied only to a specific quantity of an item.

Since the condition is already defined by the template, you only need to specify the details of the offer:

The following table describes the offer properties:

Property	Description
Number of Items to Discount	Enter the number of items that can receive the discount, or check Unlimited. For instance, if a customer purchases six items in the discounted category, you might discount five of them.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.

Property	Description
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

To exclude items from the discount, click the Add Criteria button under the Items to Exclude area. For instance, you may want to discount all items in a category except for a specific brand.

Spend Y Get Item Discount

This promotion discounts a particular item or items when a customer spends the specified amount.

First, specify the Spend threshold for the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab. Note that the promotion upsell section only appears in the condition and offer template when you first create the promotion. To edit a promotion upsell, use the Promotion Upsells section of the promotion's General tab.
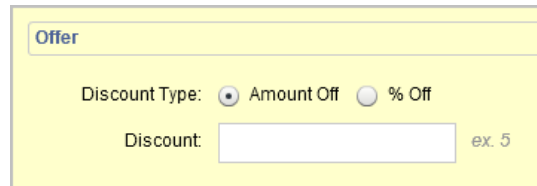
Next, specify the offer:

The following table describes the offer properties:

Property	Description
Number of Items to Discount	Enter the number of items that can receive the discount, or check Unlimited. For instance, if a customer purchases six items in the discounted category, you might discount five of them.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

To exclude items from the discount, click the Add Criteria button under the Items to Exclude area. For instance, you may want to discount all items in a category except for a specific brand.

Spend Y in X Get Item Discount

This promotion discounts a particular item or items when a customer spends the specified amount in the specified product areas. Note that this is different from the promotion. A Spend Y promotion looks only at the total amount spent on the order to determine whether the customer qualifies for the promotion, while the Spend Y in X examines the individual items in the shopping cart. Therefore the two promotion types do not behave identically.

First, specify the Spend threshold and the Spend in options for the condition. The Spend in criteria can be categories, products, or specific SKUs. You can refine the condition by adding more criteria.

Note that any products that fit into the product areas defined by the Spend in criteria are not able to receive any discounts once the promotion criteria are met. For example, you might create a "Spend $100 in Accessories, Get $5 off a Throw Pillow" promotion. Throw pillows are a subcategory of accessories. If the customer spends $100 on throw pillows, none of those pillows receive the $5 discount, since that would mean that the customer no longer met the original qualification for the promotion.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsell part of the General tab. Note that the Promotion Upsell section only appears in the condition and offer template when you first create the promotion. To edit a promotion upsell, use the Promotion Upsell section of the promotion's General tab.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Number of Items to Discount	Enter the number of items that can receive the discount, or check Unlimited. For instance, if a customer purchases six items in the discounted category, you might discount five of them.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.

To exclude items from the discount, click the Add Criteria button under the Items to Exclude area. For instance, you may want to discount all items in a category except for a specific brand.

Tiered Price Break

Tiered price breaks allow you to apply different levels of discount when customers buy multiple items. Since the condition is already defined by the template, you only need to specify the details of the offer:

First, select the items that are eligible for the discount.

The following table describes the offer properties:

Property	Description
Item(s) to Discount	Use the selection boxes to identify items that qualify for the discount.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Discount Type	Select amount off, percentage off, fixed item price, or free.

Then define the tiers.

This example defines tiers such that a customer who buys 5 of an item receives a $2 discount. If the customer buys 10 of the item, they receive a $4 discount on all 10 items.

Buy Within Specified Time Period

This promotion discounts an entire order when the customer places the order within the specified time period.

First, specify the start and end date and time for the condition. These are the same as the promotion start and end dates set on the Availability & Coupons tabs. If you are using the Redeemable For setting with an expiration date, you do not need to set start and end dates.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Buy X Get Order Discount

This promotion discounts an entire order when the customer purchases the specified item or items.

First, set up the condition parameters:

The following table describes the condition properties:

Property	Description
Number of items to buy	How many items the customer must purchase in order to receive the discount. This quantity must be at least 1.

Property	Description
Item(s) to buy	If you do not want the promotion to apply to all purchases, specify the categories, products, etc. that qualify. You can add additional criteria as needed and combine them in either AND (the purchase must meet all criteria) or OR (the purchase must meet at least one criterion) form.

To exclude items from the condition (that is, they won't help the customer qualify for the promotion), click the Add Criteria button under the Items to Exclude area.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Get Order Discount

This promotion discounts an entire order; no other conditions apply, so you only need to specify the offer details:
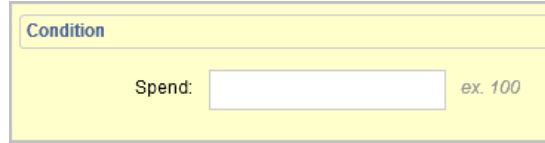
The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Spend Y Get Order Discount

This promotion discounts an entire order when the customer spends the specified amount in the specified areas.

First, specify the Spend threshold for the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Spend Y in X Get Order Discount

This promotion discounts an entire order when the customer spends the specified amount in the specified product areas.

First, specify the Spend threshold and the Spend in options for the condition. The Spend in can be categories, products, or specific SKUs. You can refine the Spend in by adding more criteria to the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Tiered Order Discount

Tiered price breaks allow you to apply different levels of discount when customers buy multiple items. Since the condition is already defined by the template, you only need to specify the details of the offer:

First, specify the discount type. Select amount off or percentage off. Then define the tiers:

In the example shown, if customers buy 10 items they receive 5% off their order total; if they buy 20 items, they get 15% off.

Buy Within Time Period Get Shipping Discount

This promotion discounts shipping when the customer places the order within the specified time period.

First, specify the start and end dates for the condition. In the case of this promotion, these fields are the equivalent of the usage start and end dates; if you change one set of dates, the other set updates automatically.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Discount Type	Select amount off or percentage off.
Discount	Enter the amount of the discount.

Buy X Get Shipping Discount

This promotion discounts shipping costs when the customer purchases a specified item or items.

First, set up the condition parameters:

The following table describes the condition properties:

Property	Description
Number of items to buy	How many items the customer must purchase in order to receive the discount. This quantity must be at least 1.

Property	Description
Item(s) to buy	If you do not want the promotion to apply to all purchases, specify the categories, products, etc. that qualify. You can add additional criteria as needed and combine them in either AND (the purchase must meet all criteria) or OR (the purchase must meet at least one criterion) form.

To exclude items from the condition (that is, they won't help the customer qualify for the promotion), click the Add Criteria button under the Items to Exclude area.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Discount Type	Select amount off, percentage off, fixed shipping price, or free.
Discount	Enter the amount of the discount. If you selected fixed shipping price, enter the shipping price to use.

Get Shipping Discount

This promotion discounts shipping for all orders, with no other condition. Specify the offer:

The following table describes the offer properties:

Property	Description
Discount Type	Select amount off, percentage off, fixed shipping price, or free.
Discount	Enter the amount of the discount. If you selected fixed shipping price, enter the shipping price to use.

Spend Y Get Shipping Discount

This promotion discounts shipping when the customer spends the specified amount.

First, specify the Spend threshold for the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Discount Type	Select amount off, percentage off, or free.
Discount	Enter the amount of the discount

Spend Y in X Get Shipping Discount

This promotion discounts shipping when the customer spends the specified amount in the specified product areas.

First, specify the Spend threshold and the Spend in options for the condition. The Spend in condition can be categories, products, or specific SKUs. You can refine the Spend in condition by adding more criteria.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsell part of the General tab.

Next, specify the offer:

- Discount Type—Select amount off, percentage off, or free.

- Discount—Enter the amount of the discount

Availability & Coupons Tab

When you configure a promotion, you define the promotion's lifecycle. Click the promotion's name and update the properties that determine when a promotion is active and usable.

Note: Availability is also affected by the Enabled property on the General tab. If a promotion is disabled, the promotion is not usable even if it is within the availability period you specify.

On the Availability & Coupons tab, specify the following:

Availability & Coupons

★ **Promotion availability**
Requires customer action (any user)

Usage period
None specified

Coupons
No value specified

Give to a customer more than once
No

★ **Max uses per customer**
1

Stacking Rule

Stacking rule
No value specified

Promotions to exclude
No value specified

Promotions to include
No value specified

The following table describes the tab's properties:

Property	Description
Promotion Availability (Required)	Whether the promotion is available to all customers, can only be used with a coupon or scenario, or is only available to registered customers. The default is "Requires a customer action (any user)."
Usage Period (Optional)	You can define the promotion's usage period either with a start and end date, or as a period of time starting from the moment the customer receives the promotion (for example, creates a customer profile). Promotions with no usage period expire only when they are disabled.
Shipping Groups (shipping promotions only)	Specify whether the promotion applies to all of the customer's shipping groups, or only to the first shipping group. For example, you might want to offer free shipping, but if the customer is shipping items to three different locations, only the first shipment is free.
Coupons (Optional)	This option is only visible if you have selected one of the "Requires a customer action" options under Promotion Availability. Specify which existing coupons can be used for the promotion, or create a new coupon.

Property	Description
Give to a Customer More Than Once (Required on "Requires a…" promotions)	Specify whether or not a customer can receive the promotion multiple times. The default is No.
Max Uses per Customer (Required on "Requires a…" promotions)	Specify the number of orders on which the customer can use the promotion once it has been granted. The default is 1.
Stacking Rule	Stacking rules allow you to control which promotions can be used together. See Managing Promotions with Stacking Rules (page 145) for details. You can associate a promotion with a stacking rule through the promotion itself (using this tab) or through the stacking rule asset type. You can also use the stacking rules section of the Availability & Coupons tab to specify promotions that can or can't be used with the current promotion.
Promotions to Exclude	This property allows you to specify promotions that can never be used with this promotion. Note that in order for the exclusion to work, the excluded promotion must have a lower priority than the promotion that is excluding it. See Managing Promotions with Stacking Rules (page 145) for details.
Promotions to Include	This property allows you to specify promotions that can be used with this promotion. Note that exclusions always take precedence over inclusions; once a promotion has been specifically excluded either specifically through Promotions to Exclude or through stacking rules, it **cannot** be reincluded by another rule or by Promotions to Include. See Managing Promotions with Stacking Rules (page 145) for details.

Sites Tab

The Sites tab is only available for promotions if you have more than one registered site configured (see the *ATG Multisite Administration Guide* for information on multisite features). You can use the Sites tab to specify that a promotion only applies to items purchased from specific sites. For example, if you have a site focused on seasonal items, you may want to apply a promotion only to those items.

You can select individual sites, site groups, or a combination of groups and sites (site groups are created in Site Administration). Note that if you select both a site group and a site within that group, the site does not act as a restriction; all sites in that group are eligible for the promotion.

Note that if nothing is specified, the promotion is valid on all sites. Also note that if you have specified site membership for a category, product, etc. as part of your condition or offer criteria on the General tab, you are responsible for ensuring that any site or site group selection on the Sites tab does not conflict with that

condition. If a condition or offer depends on a site that is not valid for the promotion, the customer cannot qualify for that promotion.

On the Sites tab, you can set the following properties:

- Sites—Select sites on which the promotion can be used.
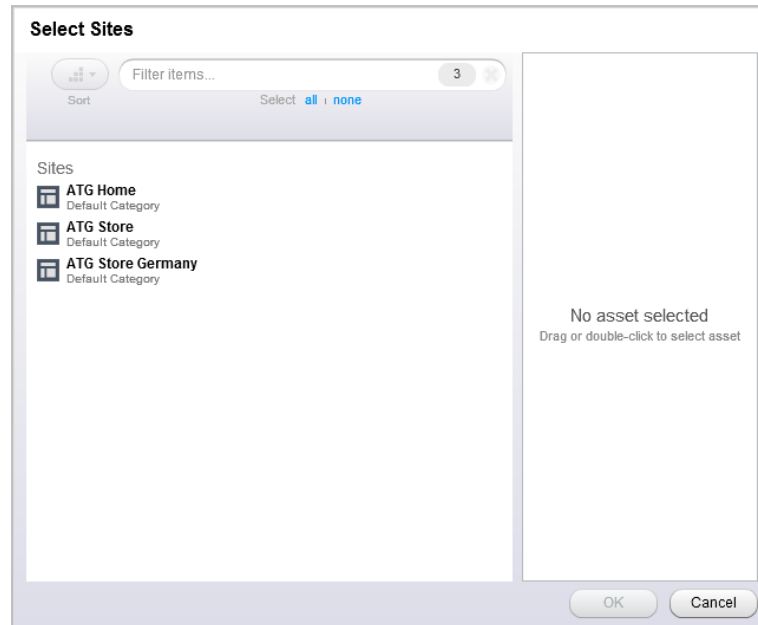
- Site Groups—Select site groups on which the promotion can be used.
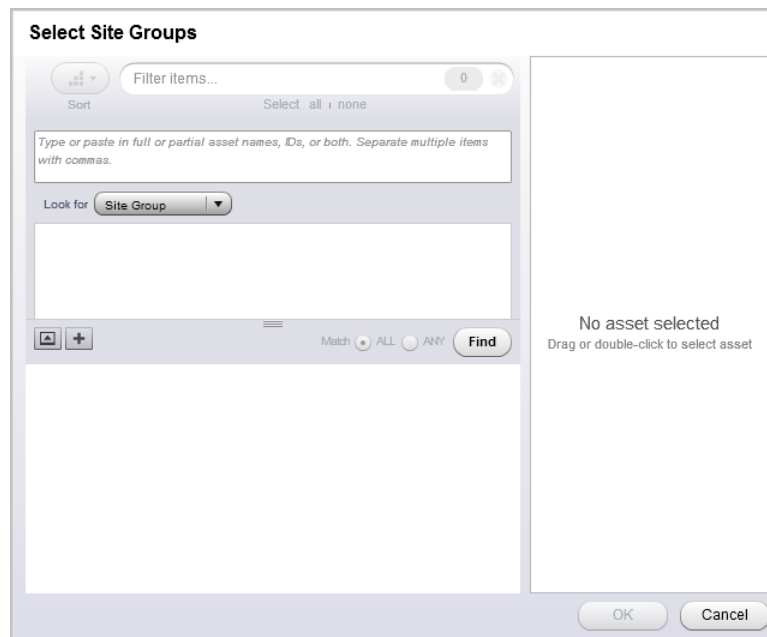
Media Tab

As with other asset types, the Media tab allows you to associate images with your promotion for display on product pages, e-mails, and other communications.

For image properties, click the Select button to locate or create a media asset. The Media tab can be configured to include additional media item types; by default, you can set the following properties, all of which are optional:

For details about working with Media properties, see *Creating and Managing Media Assets and Folders* (page 79).

Creating Gift with Purchase Promotions

Gift with purchase promotions are a special promotion type that allows you to give customers a free item as part of their order.

Free gift criteria can be specified as any of the following asset types:

- SKU

- Product

- Category

- Content group

SKU bundles cannot be used as gift items.

When a customer's order qualifies for the gift with purchase promotion, one of two things can happen:

- If no item in the cart meets the gift item criteria and the promotion does not provide any gift selection choices, the gift item is automatically added to the cart. If the promotion does provide choices, a placeholder is automatically added to the cart, and the customer can select their gift later. Whether added automatically or selected, these gift items cannot be used to qualify for any other promotions.

- If the gift item is already in the customer's cart, the item is repriced to be free. These manually-added items could have been used to qualify for other promotions, but once they are repriced, they can no longer do so.

Keep in mind that if you offer multiple potential items as gifts, your store pages must be coded to include a way for the customer to select a gift. See the *ATG Commerce Guide to Setting Up a Store* and the *ATG Commerce Reference Store Overview* for information and examples.

If a customer changes their order so it no longer qualifies for the promotion, you can configure the behavior per promotion using the Auto-Remove from Cart setting. If Auto-Remove from Cart is set to Yes, gift items that were automatically added to the cart (or selected from an automatically-provided option) are automatically removed if the cart no longer qualifies. If Auto-Remove from Cart is set to No, gift items that were automatically added are repriced at their usual price.

Items that were manually added to the cart are always repriced at their normal price, and are never removed.

Removing and Re-Adding Gift Items

If the customer qualifies for a free gift and the gift is added to the cart, the customer can manually remove the gift (perhaps the customer has no interest in the free item). In this case, the gift item or placeholder is not automatically re-added while the cart qualifies for the promotion. If a free gift is manually removed from the cart, but some other manually added item already in the cart meets the gift criteria, the remaining item is repriced to free.

Manually removed gift items can be reclaimed manually; the item will be repriced to free as long as no other item has taken the gift item's place. Items can also be re-added by un-qualifying and requalifying for the promotion. Note that this case may be difficult for shoppers to understand unless you provide information in the shopping cart.

Condition & Offer Templates for Gift with Purchase

The Condition and Offer property editor appears on the General tab. See Condition & Offer Templates (page 109) for information on templates for other promotion types.

There are two ways you can approach gift with purchase promotions:

• Gift items are not available for purchase and always have $0.00 price

• Gift items are available for purchase and have a price, but are discounted to free when the order qualifies for the promotion

The default configuration assumes that gift with purchase items have a non-zero price. If you want your gift with purchase items to be zero-priced, you must set the `filterTargetForZeroPrices` property of the `Qualifier` component to false. See the *Qualifier Class* chapter of the *ATG Commerce Programming Guide* for information. Bear in mind that you must code your shopping cart pages so that customers cannot increase the quantity of the zero-priced item, and that other zero-priced items that are not gifts will not be filtered when applying promotions.

The difference between zero-price and non-zero-price gift items becomes important when a customer returns an item that qualified their order for the gift with purchase. Consider the following scenarios when a customer places an order and receives a gift with their purchase:

• The gift has zero price. The customer returns the qualifying item for full price and keeps the gift item. This scenario may be acceptable if the gift item is a small sample or other item that would not normally be returnable on its own, but may not be acceptable if the item is normally available for purchase.

• The gift has a non-zero price. The customer returns the qualifying item. Their order no longer qualifies for the gift, and is repriced. Any refund or exchange takes the actual cost of the gift item into account.

Get Gift with Purchase

This promotion provides the customer with a free gift when the customer makes any purchase. For example, "Get a free votive candle with any purchase."

This promotion can only apply once to a given shopping cart. The template prevents gift items from also acting as qualifiers for the promotion; to continue with our example, if the customer's cart contains only a single votive candle, that candle is not repriced to free. However, if the customer places another non-gift item in the cart, the non-gift item qualifies that customer for the promotion, and the votive candle is repriced to free.

Specify the offer:

The following table describes the offer properties:

Property	Description
Gift with Purchase	The free gift item.
Auto Remove from Cart?	Specify whether gift items that were automatically added to the cart should be automatically removed if the cart no longer qualifies.

Buy Item X Get Gift with Purchase

This promotion provides the customer with a free gift when the customer buys a specific item. For example, "Buy any pair of shoes, get a free pack of socks."

This promotion can only apply once to a given shopping cart; if shoppers add two of the qualifying item, they still only receive one gift item.

In addition, the template prevents gift items from also acting as qualifiers for the promotion. For example, you could set up a promotion that offers a free pair of Brand X gloves with the purchase of any gloves. If the customer adds Brand X gloves to the cart, they do not qualify for the promotion, because the free item cannot be used to qualify. (If you want to set up a buy one, get one promotion type, see the BOGO (Buy One Get One) (page 109) template.) If the customer adds a different brand of gloves, they qualify for the Brand X promotion.

First, set up the condition parameters:

The following table describes the condition properties:

Property	Description
Number of items to buy	How many items the customer must purchase in order to receive the gift item. This quantity must be at least 1.
Item(s) to buy	If you do not want the promotion to apply to all purchases, specify the assets that qualify. You can add additional criteria as needed and combine them in either AND (the purchase must meet all criteria) or OR (the purchase must meet at least one criterion) form.

To exclude items from the condition (that is, they won't help the customer qualify for the promotion), click the Add Criteria button under the Items to Exclude area.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Gift with Purchase	The free gift item.

Property	Description
Auto Remove from Cart?	Specify whether gift items that were automatically added to the cart should be automatically removed if the cart no longer qualifies.

Spend Y Get Gift with Purchase

This promotion provides the customer with a free gift when the customer spends a specified amount of money. For example, "Spend $50, get a free movie ticket." Note that this promotion behaves likes the Spend X in Y promotion in that it examines the individual items in the shopping cart, not the order total. Products identified as gifts do not count toward the Spend Y total.

This promotion can only apply once to a given shopping cart; if shoppers add two of the qualifying item, they still only receive one gift item.

First, specify the Spend threshold for the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab. Note that the promotion upsell section only appears in the condition and offer template when you first create the promotion. To edit a promotion upsell, use the Promotion Upsells section of the promotion's General tab.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Gift with Purchase	The free gift item.
Auto Remove from Cart?	Specify whether gift items that were automatically added to the cart should be automatically removed if the cart no longer qualifies.

Spend Y in X Get Gift with Purchase

This promotion provides the customer with a free gift when the customer spends a specified amount of money in the specified product group. For example, "Spend $300 in the Home Accents category, receive a free area rug."

This promotion can only apply once to a given shopping cart; if shoppers add two of the qualifying item, they still only receive one gift item. The template prevents gift items from also acting as qualifiers for the promotion.

For example, you set up a promotion in which customers who spend $200 in Home Accents receive a particular lamp. The customer adds items to their cart, including that lamp. The cart total is $200, but the lamp is removed because it is the target of the promotion. The customer must add other items to qualify for the promotion, at which point the lamp is repriced to free.

First, specify the Spend threshold and the Spend in options for the condition. The Spend in can be categories, products, or specific SKUs. You can refine the Spend in by adding more criteria to the condition.

Optionally, you can define a promotion upsell for the promotion. This allows your site to inform customers when they are close to qualifying for the promotion. Bear in mind that the upsell does not appear on your site automatically, but must be incorporated into a JSP or otherwise actively presented to the customer.

If you specify a promotion upsell as part of the condition and offer, you can still specify additional upsells under the Promotion Upsells part of the General tab.

To exclude items from the condition (that is, they won't help the customer qualify for the promotion), click the Add Criteria button under the Items to Exclude area.

Next, specify the offer:

The following table describes the offer properties:

Property	Description
Gift with Purchase	The free gift item.
Auto Remove from Cart?	Specify whether gift items that were automatically added to the cart should be automatically removed if the cart no longer qualifies.

Creating Advanced Condition and Offer Statements

Advanced conditions and offers can be used as part of an item, order, or shipping promotion. Rather than providing a template of preselected properties, an advanced condition and offer statement allows you to build any combination of condition and offer criteria necessary for your promotion.

You can start a promotion using a template and convert it to an advanced condition and offer. The converted promotion keeps any criteria you have already set, and allows you to add whatever is not included in the template.

To create an advanced promotion:

1. Create a new item, order, or shipping promotion as usual.

2. Click in the Condition and Offer section to activate it.

3. Click Add.

4. Click Create Advanced Condition & Offer.

5. Create the condition for your promotion.

    Specify whether items that qualify a customer for a promotion can also be considered targets for the promotion.

Condition

Use this template to construct an offer condition that is not covered by the template options. Note that if the condition starts with "Apply Offer: When" then the items can also be used to qualify for other promotions. If the condition starts with "Apply Offer: For" the items cannot be used to qualify for any other promotions. Always use a For condition for Gift with Purchase promotions.

☐ No discounts on qualifier items

Apply Offer: When ▾ order contains ▾ total ▾

quantity ▾ of at least ▾

1 (product ▾

named ▾ (product) ⬓) ▾

(end of conditior ▾

Note: In addition, if the qualifier and target items for a promotion overlap, and if you have selected No discounts on qualifier items, you may see unexpected behavior in your promotions. For example, you may create a promotion "Buy 1 hat, get a gift from the accessories category." The customer adds a hat to the cart. Because hats belong to the accessories category, it is eliminated from consideration as a qualifying item, and the gift is not added to the cart. If the customer goes on to add a pair of gloves, those are treated as the target, and the hat is a qualifier; the gloves are repriced as free.

Click the dropdown arrow to display a list with the options Always, When, and For.

Selecting When or For displays a series of conditions that appear as a sentence. The items you see in the rule are the first item in a dropdown menu from which you can select a different item. Sometimes an item will be an empty space that you fill in by selecting a repository item or entering text.

Note that if you start the condition phrase with "When," the items specified can also be used to qualify for other promotions. If you start the phrase with "For," the items cannot be used to qualify for any other promotions.

Also note that if your condition phrase is based on "order contains only," it is possible for an empty cart to qualify for a promotion if qualifier items have been filtered out previously. Qualifier items could be filtered out by previously-applied promotions or due to the "No discounts on qualifier items" constraint.

Warning: If you are creating a Gift with Purchase promotion, be aware that target gift items can qualify for their own promotions unless you specifically exclude them. The provided Gift with Purchase templates prevent this, but if you are creating an Advanced condition, be aware that this case is possible; always use For conditions for Gift with Purchase.

Note that discount rules can incorporate complex and/or statements that designate an order of operations using parentheses. The rule wizard will sometimes include parentheses automatically to organize items into phrases.

At the end of most rules, you'll see a parenthesis. If you want to add a new phrase to a rule, click the last element and select either *and* or *or*.

6. Check the No discounts on qualifier items box if you do not want items that can be used to qualify for the promotion to also be eligible for discounts.

7. Create the offer for your promotion. The offer options depend on the type of promotion. Set some or all of the following:

The following table describes the offer properties:

Property	Description
Offer Type	Select Standard, Tiered, or Gift with Purchase.
Items to discount	Creates a rule similar to the condition statement, which identifies items eligible for the discount.
Apply Discount To	Select whether the discount should be applied to the lowest or the highest priced items in the order first.
Discount Type	Select amount off, percentage off, fixed item price, or free.
Discount	Enter the amount of the discount or, if the Discount Type is Fixed Item Price, enter the price of the item.
Gift with Purchase	If you are creating a Gift with Purchase promotion, specify the gift item or items. If you provide a single gift item, it is automatically added to the customer's cart once the cart qualifies for the promotion. If you specify more than one possible gift, the shopper receives all gifts.
Auto Remove from Cart?	If you are creating a Gift with Purchase promotion, specify whether gift items that were automatically added to the cart should be automatically removed if the cart no longer qualifies.

Note: If you have created your own templates or manually editing the PMDL, it is possible for you to create a condition and offer that do not conform to the PMDL syntax. If you attempt to view a promotion that has invalid PMDL, Merchandising displays the raw PMDL that includes the error.

Rules with errors cannot be displayed in editable form; however, by viewing the PMDL you may be able to locate the problem. If an error occurs, your administrators can extract the PMDL from the repository and correct the error manually.

Using Coupons with Promotions

You can create coupons using the Availability & Coupons tab of a promotion, or you can create them independently and link them to promotions at some later point, either through the coupon or through the promotion.

Creating Coupon Folders

Coupon folders are used for organizing your coupons. To create a new coupon folder:

1. In the Browse tab, navigate to Coupons.

2. Click the Create New button, and choose Coupon Folder.
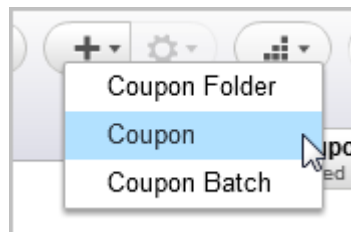
The Details pane displays empty fields you can use to define the coupon folder.
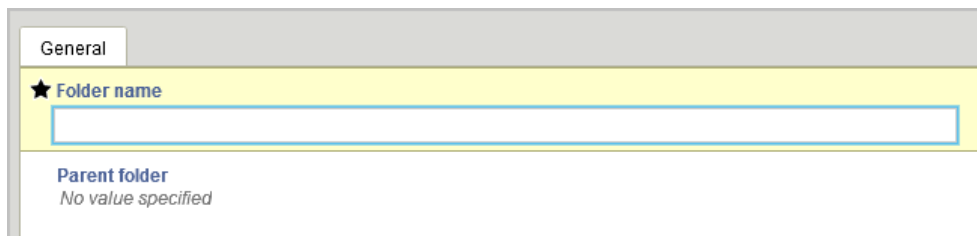
3. Enter a name for the coupon folder in the Name text box (required).

4. Specify the folder's location in the hierarchy by adding, replacing, or removing a parent using the Select Parent and Clear buttons on the top right of the Details pane. A parent is preselected if you see an asset name beside Select Parent.
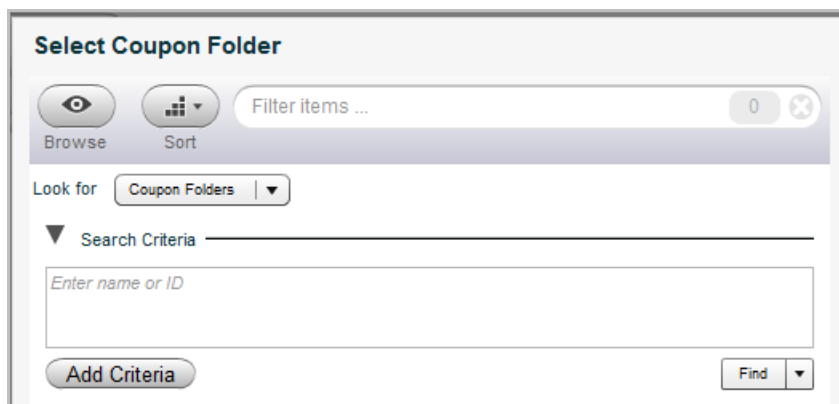
- Add or replace a parent by clicking Select Parent and, once the Select an Item dialog box opens, clicking the radio button beside your preferred parent. Click OK.

- Remove a parent by clicking Clear beside Select Parent. A coupon folder without a parent resides at the top level of the coupon hierarchy.

5. Click Create.

In the Navigation pane, the coupon folder displays.
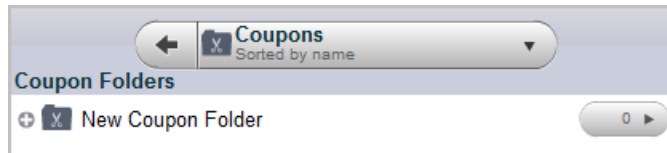
The Details pane contains the General tab, which shows properties for the coupon folder.

Creating Freestanding Coupons

To create a new coupon:

1. In a Manage Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Coupons.

4. From the New Item gear, select Coupon.

5. Provide the following information for the coupon:

The following table describes the coupon properties:

Property	Description
Coupon Code (required)	The coupon code is used by the customer when the coupon is redeemed. Merchandising automatically generates a coupon code (an example is shown above). You can change the code to something more meaningful to your customers; for example, a coupon for free shipping on holiday orders might be HOLFREESHIPPING. Note, however, that the code cannot be edited after creating the coupon. Coupon codes are case-sensitive.
Coupon Name (optional)	You can provide a display name for the coupon. If you do not provide a display name, the display name of the associated promotion is used.
Start and End Date	If the coupon is only good for a certain time period, enter the start and end dates that define that period.
Uses	Number of times the coupon can be used.
Parent Folder (optional)	If you want to move the coupon from its current location, you can select a different parent folder, or create a new folder.
Promotions (optional)	Select one or more existing promotions, or create a new promotion with which to associate this coupon. You do not have to associate any promotions with a coupon when you create the coupon; however, in order to distribute the coupon to customers, you must associate the coupon with one or more promotions.

Property	Description
Redeemable on Promotion Sites	If you are using the multisite feature, specify whether the coupon can be redeemed on all sites, or only on those sites with the coupon's associated promotion is connected (see Sites Tab (page 127)).
	If the coupon is redeemable on all sites, but the associated promotion is linked to a specific site, the customer must check out their order on that site in order for the promotion to apply during pricing.

Adding Coupons to a Promotion

You can add coupons to a promotion in two ways:

- On the General tab of the Coupon, you can select an existing promotion or create new promotions with which to associate the coupon.
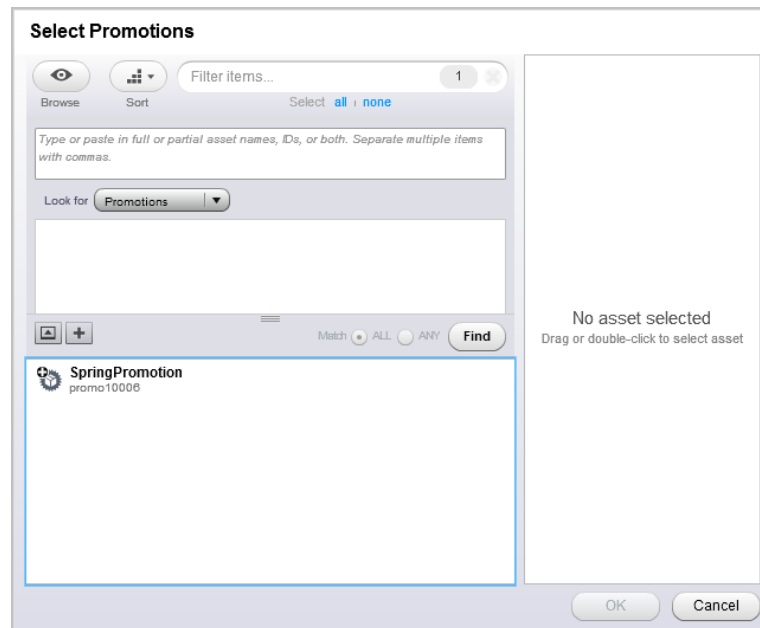
- On the Availability & Coupons tab of the Promotion, you can select existing coupons or create new coupons with which to associate the promotion.
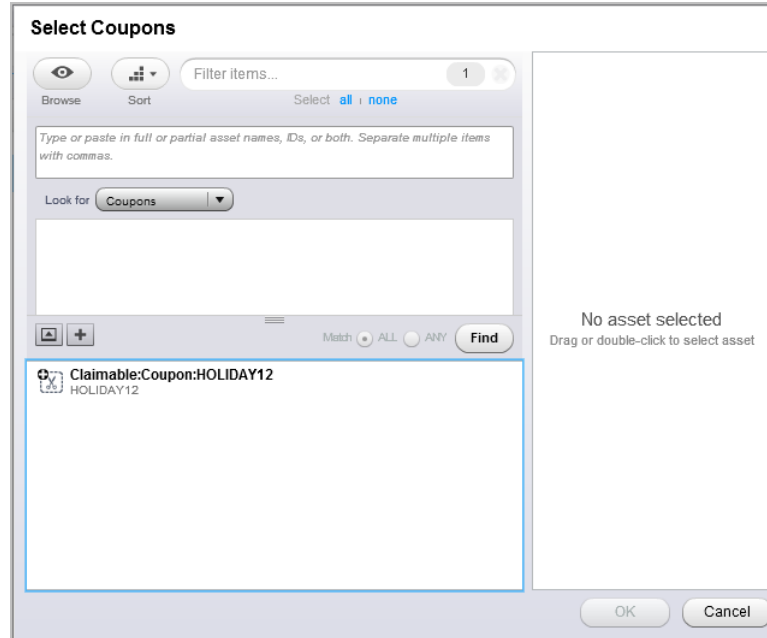
Click a display name to view or edit details of the promotion or coupon, depending on your starting point.

Creating Coupon Batches

Coupon batches allow you to create large numbers of coupons with usage limits and randomly generated coupon codes, in order to closely target and monitor coupon use.

To create a new coupon batch:

1. In a Manage Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Coupons.

4. From the New Item gear, select Coupon Batch.
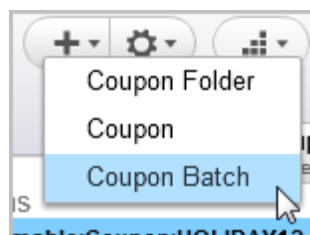
5. Provide the following information for the coupon:

The following table describes the coupon batch properties:

Property	Description
Coupon Code (prefix) (required)	For coupon batches, the coupon code is used as an identifying prefix. The coupon code is used when the customer claims a coupon, along with a randomly generated coupon number and validation code. Note that you cannot edit this value once the coupons have been generated.
Number of Coupons (required)	How many coupons to generate as part of the batch. Note that after the coupons have been generated, you cannot add more to an existing batch.
Coupon Name (required)	Name for the coupon.
Start & End Date (optional)	If the coupon is only good for a certain time period, enter the start and end of the availability period.
Coupon Usage Limit (optional)	Number of times each coupon in the batch can be used. The default setting is 1.
Parent Folder (optional)	If you want to move the coupon from its current location, you can select a different parent folder, or create a new folder.

Property	Description
Promotions (optional)	Select one or more existing promotions, or create a new promotion with which to associate this coupon. You do not have to associate any promotions with a coupon when you create the coupon; however, in order to distribute the coupon to customers, you must associate the coupon with one or more promotions.
Redeemable on	If you are using the multisite feature, specify whether the coupon can be redeemed on all sites, or only on those sites with the coupon's associated promotion is connected (see Sites Tab (page 127)).

1. Click Create.

Viewing and Exporting Coupon Batches

You can view information on coupons within a coupon batch by exporting the batch to either CSV or XLS format. To view and export a coupon batch:

1. In a Manage Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Coupons.

4. Select the batch coupon item. The coupon batch Redemption Rate is displayed on the General tab.

5. Click Preview and Export Coupons.

6. Select coupon properties to export. Click Preview to see properties with data.

7. Select Excel or CSV as the export format. Note that some versions of Excel limit the number of data rows per file.

8. Click Export. Follow your Web browser prompts to open or save the file.

Sorting Promotions

Merchandising provides a standard user interface for sorting your assets. The properties by which assets can be sorted vary by asset. You can sort promotions either by type or by folder:
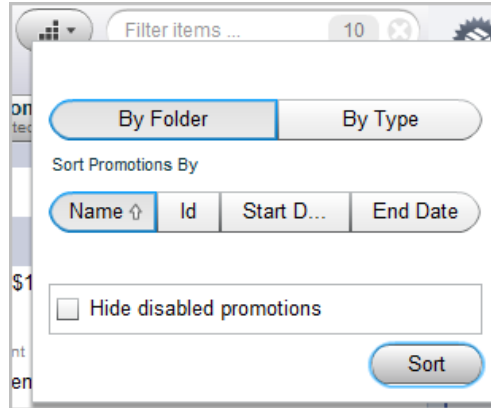
You can then further sort them by name, ID, start date, or end date. If you sort the promotions by type (item, shipping, or order discount) you have the further option of sorting by priority.
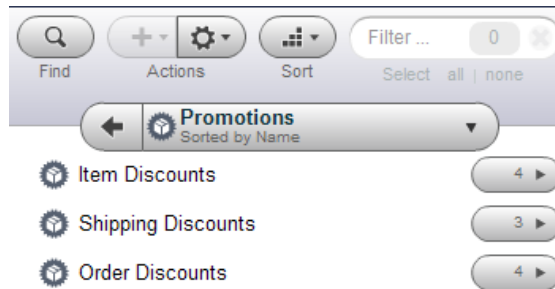
Managing Promotions with Stacking Rules

Stacking rules prevent customers from taking advantage of unintended synergy among your promotions. (Coupon batches are another way of preventing customers from spreading promotions that you would prefer to target narrowly; see Creating Coupon Batches (page 142) for information.)

The stacking rules user interface consists of two parts:

- The stacking rule asset type allows you to define groups of promotions, which can then be combined with or excluded from use with other groups. You can also specify how many promotions within a group can be applied to any single order.

- The promotion asset type allows you to specify individual promotions as usable with or excluded from use with other promotions.

Promotions are always applied in the following order: item discounts, order discounts, shipping discounts. Therefore, regardless of whether you are using stacking rule combinations or promotion inclusions and exclusions the following apply:

- Item discounts can exclude both order and shipping discounts.

- Order discounts cannot exclude item discounts.

- Shipping discounts cannot exclude either item or order discounts.

The sections that follow describe how to use stacking rules and promotion inclusion and exclusion.

How Stacking Rules Work

Each stacking rule asset includes one or more promotions that you want to treat as a group. Rules are intended to prevent simple combination strategies, for example to keep customers from combining BOGO offers with gift with purchase offers. Make sure that the business logic behind each of your stacking rules is clear and well-understood before you implement them, and that each rule is truly necessary.

Each promotion can only be associated with a single stacking rule. Each stacking rule can include any number of promotions up to the number set in the "Maximum promotions per stacking rule" property. Within a stacking rule, promotions are applied to orders according to the promotion's priority (see Creating Promotions (page 105) in this chapter for information on the Priority property).

Stacking rules have the following behavior:

- If an order qualifies for more than one promotion, and those promotions are linked to mutually exclusive stacking rules, the promotion with the highest priority is applied, and all other promotions are skipped.

- If you specify that Stacking Rule X is not combinable with Stacking Rule Y, then Y cannot be combined with X. If you change the combine list on one stacking rule, the affected stacking rule is automatically updated.

- Any promotion that is linked to a stacking rule that is excluded from use with the current stacking rule cannot be applied.

Using Included Promotions and Excluded Promotions

In addition to using stacking rules, merchandisers can specify include and exclude behavior on the Availability & Coupons tab of the Promotion asset type. These settings override the combinations allowed by the stacking rules, and therefore allow you to create exceptions to those rules when required.

Important: Include and exclude exceptions should be used rarely, to prevent confusion as to exactly when promotions apply.

The Promotions to exclude collection editor allows you to define individual promotions that cannot be combined with the current promotion (in addition to any stacking rule exclusions). For example, Promotion A may be included in Stacking Rule 1. Stacking Rule 1 combines with Stacking Rule 2, which includes Promotion B. You do not want Promotions A and B used together, so you add Promotion B to the Promotions to exclude list on Promotion A.

The Promotions to include collection editor allows you to make similar overrides in the other direction. For example, Promotion C may be included in Stacking Rule 3. Stacking Rule 3 does not combine with Stacking Rule 4, which includes Promotion D. You want Promotions C and D used together, so you add Promotion D to the Promotions to include list on Promotion C.

Note that if a promotion has already been applied to an order and that promotion excludes another promotion, the excluded promotion cannot be re-included by any promotions that apply later in the pricing process.

Creating Stacking Rules

To create a stacking rule:

1. In a Manage Commerce Assets project, navigate to Merchandising.

2. Select Promotions and Coupons.

3. Select Stacking Rules.

4. From the New Item gear select Stacking Rule.

5. Fill in the property details on the General tab.

The following table describes the rule properties:

Property	Description
Name	Name for the stacking rule.
Maximum promotions per stacking rule	The maximum number of promotions that can be combined using this stacking rule.
Stacking rule combinations	Specify additional stacking rules that can be used with the current rule.

1. Specify the promotions to include on the Promotions tab.

2. Click the Create button at the bottom of the Details pane.

15   Creating and Managing Price Lists

Price lists allow you to target a specific set of prices to a specific group of customers.. Typically, prices are defined in a base price list and inherited by other price lists. That way, you can create a hierarchy of price lists and change prices only when you want to override inherited values. For example, suppose the price of the product Sleeveless Polo is defined as $19.99. All the Sleeveless Polo's SKUs inherit the price of $19.99 unless you explicitly override that price. For instance, you could lower the price of all SKUs for white Sleeveless Polo shirts during a week-long sale event.

You manage price lists in the Merchandising Price Lists view.

Price List Basics

The following are some key terms that you need to be familiar with when you work with price lists in Merchandising:

- **Base price list:** is the price list from which a current or new price list inherits price values.

- **SKU pricing:** is a simple pricing method that uses the product or SKU catalog page to assign a list price and, optionally, a sale price, to the SKU. SKU prices are independent of price lists, but you can use the two pricing methods together if the pricing model for your sites permits it. See *Creating and Managing SKUs* (page 73) for information about setting SKU pricing..

- **Volume pricing:** Sets the price of a product based on the number of items purchased. Price lists support two popular volume pricing models: bulk pricing and tiered pricing. Bulk pricing calculates the price of a product based on the minimum quantity ordered. Tiered pricing calculates the price of a product using fixed quantity or weight at different pricing levels. See *Defining Volume Pricing* (page 156) for more information.

Before You Begin

This chapter describes the price list creation and management tasks you can perform in the Merchandising Price Lists view. Merchandising assigns each user role a default level of access to price lists. For example, by default, users with the EPub-Admin role can create price list folders but users with the EPub-User role cannot. If Merchandising displays an error like the following when you try to perform a task in the Price Lists view, contact your administrator.
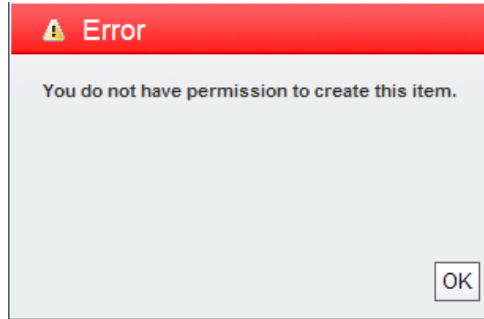
In addition to the tasks described in this chapter, you can also perform the following price list tasks while working with individual products and SKUs in Merchandising:

- Change prices for a product. See *Creating and Managing Products* (page 67) for more information.

- Change prices for al SKU. See *Creating and Managing SKUs* (page 73) for more information.

Viewing Existing Price Lists

Follow these steps to view existing price lists in Merchandising:

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists or Price Lists and Folders.

2. (Optional) If you are working in Price Lists and Folders view, open a folder in the Navigation pane.

3. In the Navigation pane, select the price list to view.

4. Click the General tab to see basic information about the price list. See Price List Properties (page 153) for more about this tab.

5. Click the Price Lists tab to see the list of products, SKUs, and prices.

6. Select one of the following options from the Show menu and then click List:

   - Products displays the list of all products in the price list and their prices.

   - Products and Sub Skus displays the list of all products, associated SKUs, and their prices.

   - Skus displays the list of all SKUs in the price list and their prices.

   To filter the list, type or paste some text in the Product/Sku Starts With box and click List.
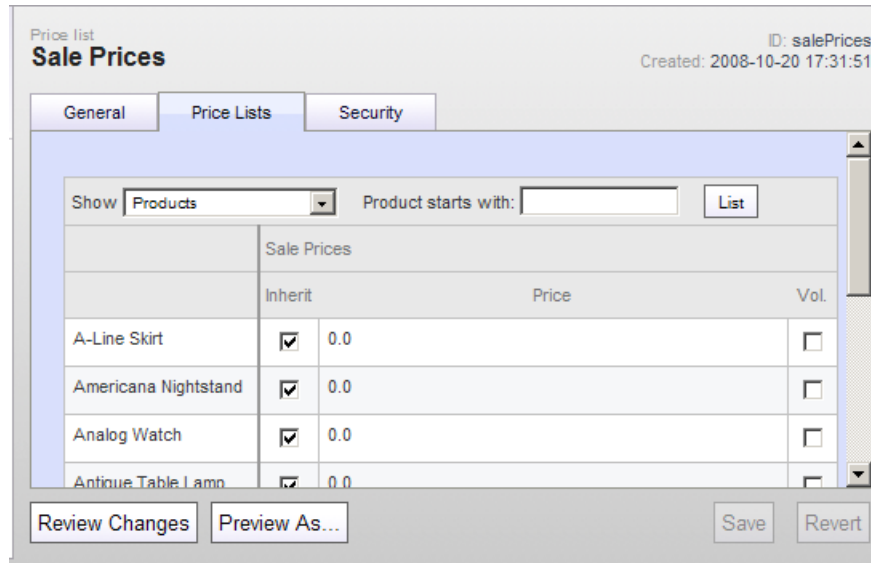
Creating Price Lists and Price List Folders

ATG recommends that you create a hierarchy of price lists, starting with a base price list from which other price lists inherit. That way, you need to provide prices to other lists only when you want to override the defaults from the base list.

There are two views that you can use to create and delete price lists. Depending on how your administrator configured Merchandising, you might not see both views.

- Price Lists view organizes price lists in a tree that reflects the inheritance relationships among lists. Base price lists display on top and nested within them are their child lists.

- Price Lists and Folders view organizes price lists in the folders that you create. If you do not add price lists to folders, they appear alphabetically in the top-level of the hierarchy. If you use this view, it is a good idea to create the folder structure first, then create price lists within this structure.

   Price list folders help you organize price lists, but the folder hierarchy does not represent the parent-child hierarchy that controls price list inheritance. To see the base price list from which a price list inherits, look on the price list's General tab in the Details pane. See Viewing Existing Price Lists (page 150) for more information.

Creating Price List Folders

To create a price list folder:

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists and Folders.

   Existing price lists and folders appear in the Navigation pane.

2. (Optional) To create a subfolder, select a parent folder in the Navigation pane.

3. Click Create in the toolbar and select Price List Folder.

4. Fill in the property fields in the Details pane. Name is the only required field.

5. Specify the price list folder's location in the folder tree by adding, replacing, or removing a parent folder. A parent is preselected if you see a folder name next to Select Parent.

   • Add or replace a folder parent by clicking Select Parent and selecting a parent folder in the dialog box that appears. Click OK to close the dialog box.

   • Remove a parent folder by clicking Clear.

6. Click Create.

   If you did not specify a parent folder, a message tells you that this item will not appear in the parent/child hierarchy. If you click OK, the item is created at the top level. If you click Cancel, you can return to step 5 and specify a parent folder.

   The new price list folder appears in the location you specified. If you did not specify a parent folder, Merchandising creates the new folder at the top level.

Creating Price Lists

To create a price list:

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists or Price Lists and Folders.

2. (Optional) If you are working in Price Lists and Folders view, select a folder in the Navigation pane.

3. Click Create in the toolbar and select Price list.
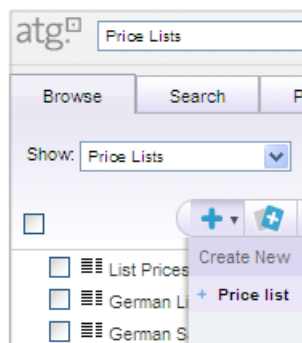
4. Fill in the property fields in the Details pane. Name and Locale are the only required fields.

5. If you want the new price list to inherit prices from another list, click Edit next to the Base Price List property. When the Select an Item dialog box opens, navigate to the price list, select it, then click OK.

6. If you are working in Price Lists and Folder view, specify the price list's location in the folder tree by adding, replacing, or removing a parent folder. A parent is preselected if you see a folder name next to Select Parent.

   • Add or replace a folder parent by clicking Select Parent and selecting a parent folder in the dialog box that appears. Click OK to close the dialog box.

   • Remove a parent folder by clicking Clear.

7. Click Create.

   If you did not specify a base price list, a message tells you that this item will not appear in the parent/child hierarchy. Click OK to proceed without a base price list, or go back to step 5 and specify a base price list.

   The new price list displays in the Navigation pane, and information that describes it displays in the Details pane.

ATG automatically populates new price lists with all products in the site catalogs on your system. You can see these listed on the Price Lists tab when the create operation is finished. New price lists also automatically display in the Price List tab in the Details pane for all products and SKUs. See *Creating and Managing Products* (page 67) and *Creating and Managing SKUs* (page 73) for more information.

Price List Properties

You can work with the following Price List properties in the Details pane. The properties described in this section are the default Merchandising properties. Your administrator might have added new price list properties that are specific to your Web sites.

Property	Description
Name	The name of the price list. This name identifies the price list in Merchandising and the ACC. This property is required. The name does not have to be unique, as Merchandising assigns a unique ID to each asset you create.
Description	A description of the price list.
Locale	The locale that determines the currency and symbol to be used by prices in the price list. When prices are displayed in a browser that supports other locales, the price calculations are based on the locale specified here. This property is required.
Base price list	The price list from which the price list inherits.
Start Date	Date on which the price list is available, if a collection filter is implemented to use this property.

Property	Description
End date	Date the price list is no longer available, if a collection filter is implemented to use this property.

Linking and Unlinking Price Lists

Linking a price list associates it with a new base price list. Unlike catalog assets, you cannot link price lists to more than one parent. Each price list can have only one base price list from which it inherits.

Note: You can also associate a price list with a new parent by moving it. See .

To link a price list to a parent:

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, select the price list to link.

3. In the dialog box that appears, select a base price list from which the selected list will inherit.

4. Click OK.

   In the Navigation pane, the linked price list appears as a child of its new base price list:
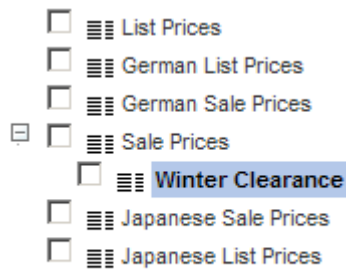
To unlink a price list from its current parent:

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, select the price list to unlink from its parent.

3. Click Unlink and select Unlink from selected location.

   In the Navigation pane, the unlinked price list no longer appears as a child of its former parent:

Overriding Inherited Prices

 In a price list that inherits from a base price list, you can override the inherited price for a specified product or SKU.

The following procedure describes how to override inherited prices in the Price Lists view. To override inherited prices in the Price List tab for a product or SKU, see *Creating and Managing Products* (page 67) or *Creating and Managing SKUs* (page 73).

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, select the price list whose prices you want to edit.

3. In the Details pane, click the Price Lists tab and show Products, Products and Sub Skus, or Skus.

4. In the row for the product or SKU whose price you want to change, uncheck Inherited.

5. Enter a new price in the price box that appears:

6. Repeat steps 4 and 5 for each inherited price you want to override.

7. Click Save at the bottom of the Details pane.

To change a price in a price list:

1. Open a Merchandising project.

2. Select Price Lists in the application dropdown menu at the top of the browse pane.

3. Select Price Lists in the Show menu.

4. Find and click the price list in the Browse pane.

5. Click the Price Lists tab in the editing pane.

Defining Volume Pricing

Price lists support two volume pricing models: bulk pricing and tiered pricing.

Bulk pricing calculates the price of a product based on the total quantity ordered. In the following example, hammers are priced at $20 each when you buy 1 to 10 hammers, $17 each when you buy 11 to 20 hammers, and $15 each when you buy 21 or more hammers.

Number of hammers purchased	Bulk Price per item	Order total
7 hammers	7 hammers at $20 each	$140
14 hammers	14 hammers at $17 each	$238
23 hammers	23 hammers at $15 each	$345

Tiered pricing applies different prices within the same order of identical items. Each price is assigned to a quantity range. In the following example, hammers are priced at $20 for the first 10 purchased, $17 each for the next 10 purchased, and $15 each for any additional hammers.

Number of hammers purchased	Tiered Price per item	Order total
7 hammers	7 hammers at $20 each	$140
15 hammers	10 hammers at $20 each 5 hammers at $17 each	$285
23 hammers	10 hammers at $20 each 10 hammers at $17 each 3 hammers at $15 each	$415

Specifying Bulk Pricing

The following procedure describes how to specify bulk pricing in the Price Lists view. To specify bulk pricing in the Price List tab for a product or SKU, see *Creating and Managing Products* (page 67) or *Creating and Managing SKUs* (page 73).

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, select the price list whose prices you want to edit.

3. In the Details pane, click the Price Lists tab and show Products, Products and Sub Skus, or Skus.

4. Click the Vol checkbox in the row for the product or SKU whose price you want to change:

5. Click the Volume Price link in the asset's Price column. This displays the Volume Pricing dialog box:

6. Select Bulk: Apply to all items purchased.

7. Click Add Price.

8. Enter a Quantity and associated Price.

    Enter 1 as the first quantity.

    The quantity purchased must meet or exceed the number you enter for Quantity in order to receive the price you specify for that quantity.

9. Repeat steps 7 and 8 for each price range you want to add.

    In the following example, up to four items cost $9.99 each, up to nine items cost $8.99 each, and 10 or more items cost $7.99 each:

10. When you finish entering volume pricing values, click OK to save the prices and close the dialog box..

11. Click Save at the bottom of the Details pane.

Specifying Tiered Pricing

The following procedure describes how to specify tiered pricing in the Price Lists view. To specify tiered pricing in the Price List tab for a product or SKU, see *Creating and Managing Products* (page 67) or *Creating and Managing SKUs* (page 73).

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, select the price list whose prices you want to edit.

3. In the Details pane, click the Price Lists tab and show Products, Products and Sub Skus, or Skus.

4. Click the Vol checkbox in the row for the product or SKU whose price you want to change.

5. Click the Volume Price link in the asset's Price column. This display the Volume Pricing dialog box:

6. Select Tiered: Apply only to items that meet or exceed the threshold.

7. Click Add Price.

8. Enter a Quantity and associated Price. As the first quantity, enter 1.

   The quantity purchased must meet or exceed the number you enter for Quantity in order to receive the price you specify for that quantity.

9. Repeat steps 7 and 8 for each price range you want to add.

   In the following example, the first four items cost $9.99 each, the fifth through ninth items cost $8.99 each, and the tenth and higher items cost $7.99 each:

10.When you finish entering the volume pricing values, click OK to save the prices and close the dialog box..

11.Click Save at the bottom of the Details pane.

Moving, Copying, and Deleting Price Lists

This section describes how to delete price lists from and move or copy price lists within the hierarchy

Moving Price Lists

You can move any price list to another location in the Price Lists tree. Moving a parent price list also moves its children. Moving or deleting a child price list does not affect its parents.

Note: You can also associate a price list with a new parent by linking it. See Linking and Unlinking Price Lists (page 154).

To move a price list:

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, click the check box next to the price list that you want to move.

3. Click the Move button and choose an option:

    • Move from selected location

    • Move from all locations

4. In the Select Destination dialog, use the Search tab or the Browse tab to locate and select the price list where you want to nest the child price list. Click OK.

Moving Price List Folders to the Top Level

Follow these steps to move a price list folder that is currently nested in another folder:

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists and Folders.

2. In the Navigation pane, click the checkbox next to the price list you want to move.

3. In the Details pane, the Parent Folder property is set to the price list folder's parent. Click Clear near the parent folder name.

4. Click Save.

    The price list folder displays in the first level of the hierarchy.

Copying Price Lists

You can copy any price list to another location in the Price Lists tree. Copying a parent price list does not move its children, but does clear the children's Base Price List property. Copying a child price list does not affect its parents.

To copy a price list:

1. In a Manage Commerce Assets project, navigate to Price Lists and show Price Lists.

2. In the Navigation pane, click the check box next to the price list that you want to copy.

3. Click the Duplicate icon.

4. In the Select Destination dialog, use the Search tab or the Browse tab to locate and select the price list where you want to nest the child price list. Click OK.

Deleting Price Lists

You can delete any price list in the Price Lists tree. Deleting a parent price list does not delete its children, but does clear the children's Base Price List property. Moving or deleting a child price list does not affect its parents.

To delete a facet:

1. In a Manage Commerce Assets project, navigate to Search Merchandising and show Facets.

2. In the Navigation pane, click the check box next to the facet that you want to delete.

3. Click Delete.

4. Click OK in the confirmation dialog to delete the facet or click Cancel to leave the facet unchanged.

Assigning Price Lists to Customers

Because prices can be based on contracts, requests for quotations, or pre-negotiated prices, it may be useful to assign a price list to an individual or to an organization.

There are two ways to use the Business Control Center to assign price lists to customers:

- Assign a price list directly to individual users. See Assigning Price Lists to Users (page 160).

- Assign a price list to an organization, so all users in an organization are provided with prices from that list. This option is available to customers who use ATG Business Commerce with Merchandising. See Assigning Price Lists to Organizations (page 162).

It's also possible to provide a price list to users dynamically, by specifying a price list based on a set of circumstances. For example, you can create a scenario that, when a user registers, assigns a price list to him or her. Then, after the user makes a purchase or clicks a particular link, you can assign a different price list. To learn more about scenarios, see the *ATG Personalization Programming Guide*.

Assigning Price Lists to Users

To assign price lists to individual users when your environment does not include ATG Business Commerce, follow these steps:

1. On the BCC home page, expand the Personalization entry in the Operations list. Click External Users.

2. In the Navigation pane, click the name of the user to whom you want to assign a price list.

3. In the editing pane, click the Commerce tab.

4. Under Commerce General, find the Price list property and click Select:

5. In the asset selector, browse or search for the Price List. When you find it, select the name and click OK.

6. If you use a Sale Price list, repeat steps 4 through 6 for the Sale Price List property.

7. Click Save.

To assign price lists to individual users when your environment includes ATG Business Commerce, follow these steps:

1. On the BCC home page, expand the Personalization entry in the Operations list. Click External Users.

2. In the browse pane, click the name of the user to whom you want to assign a price list.

3. In the editing pane, click the B2B Commerce tab.

    Under Commerce Contract, find the Price list property and click the arrow:

4. Do one of the following:

    • Choose Inherit to inherit the price list from the parent organization.

    • Choose Override to use the asset selector to find an existing price list. Select the price list and click OK.

5. Click Save.

Assigning Price Lists to Organizations

If your environment includes ATG Business Commerce, you can define organizations and assign users to them. Properties you define for an organization are automatically inherited by all users in the organization. One property identifies a contract, which is an asset that associates a catalog, price list, and payment terms. To assign a price list to an organization, associate it with a contract and then associate the contract with an organization

To associate a price list with an organization, follow these steps:

1. On the Business Control Center home page, expand the Personalization entry in the Operations list. Click External Users.

2. From the Show dropdown menu, select Organizations.

3. In the browse pane, click the name of the organization to which you want to assign the contract and price list.

4. In the editing pane, select the General tab, and find the Contract property in the Basics property grouping:

5. Click Contract and choose Override or Inherit:

Inherit: the organization inherits the contract from the parent organization. The interface reverts to the Contract arrow.

Override: displays another choice: Select or Create.

• Choose Select to use the asset selector to find an existing contract. Select the contract and click OK:

• Choose Create to create a new contract:

Click Save in the popup confirmation dialog.

Enter the name of the contract.

Click Select next to Pricelist. Use the asset selector to find an existing price list. Select the price list and click OK.

Click Create and Close.

The editing pane returns to the Organization's General tab, which shows the contract assignment:

Click Close.

See *Managing Price Lists* in the *ATG Commerce Guide to Setting Up a Store* for additional information about assigning price lists to users.

16 Defining Facets

Facets allow shoppers to locate products or SKUs based on properties such as size or price. When a visitor to your Web site clicks a facet selection, they see only the products that match the selected value. For example, if you create a facet based on the Brand property, a customer can click a brand name and view only products of that brand. Alternatively, a shopper could narrow the list of products by selecting a range of prices and see only products that fall into that price range.

This chapter contains the following information:

Faceted Search Overview

Facets are like virtual categories that are populated by the results of search queries. Facets are implemented as search refinements, which are used to narrow search results by searching within those results for only the items that fulfill a certain constraint. For example, a search might return men's shirts, and then the customer might select a facet value that narrows the results to men's shirts that are made of cotton.

Facets dynamically group assets by a property value of a product or SKU, such as color or size. The property is referred to as a faceting property. A faceting property groups products by the values stored in that property. For example, a facet based on a Color property allows shoppers to see products that match a specific color. When you create a facet, you must select a faceting property before you can specify other options.

Nested facets organize selections in a tiered hierarchy, while independent facets organize selections in two separate groupings at the same level. For example, sites that sell shoes usually create a Size facet and a Width facet. These facets can be presented at the same level so that shoppers can choose width and size independently of each other, or the width facet can be nested in the size facet so that shoppers first select size and then select width. For information about creating nested facets, see Creating Child Facets (page 170).

How Are Facets Created and Displayed?

Merchandising relies on ATG Search to generate facet sets. You define facets in Merchandising, but it is ATG Search that determines whether a facet applies to a set of products or SKUs. When page developers create

Web site pages that display facets, they display the facet selection values as hyperlinks. When a customer clicks one of these links, a query is issued to ATG Search, using the faceting property as a refinement criterion. For example, a customer might perform a search that returns a set of products that are displayed on the page. If the customer then clicks the Sale Price facet's "$100 to $200" link, a new query is issued that specifies "return only the products in this set whose sale price is between $100 and $200." The results of this query are then displayed on the page, and the facet selections are updated.

Types of Facets

There are three types of facets, each determined by the facet's location in the catalog hierarchy:

* Global facets are available to all products in a catalog or set of linked catalogs. In a multisite environment, global facets serve as cross-site facets and are available to all products on all sites.

* Catalog facets are available to all products in a catalog or set of linked catalogs. In a multisite environment, catalog facets created on the top-level catalog function as site-specific facets.

* Category facets are available to all products in a category or set of linked categories.

Note: Catalog and category facets are sometimes collectively referred to as local facets in the Merchandising and Search Merchandising UI. A catalog or category facet is defined as local when it is being viewed in the context of its parent catalog or category. For example if you define brand_facet for CatalogA, brand_facet is CatalogA's local facet.

Creating Facets

To create a facet:

1. In a Managing Commerce Assets project, navigate to Search Merchandising and show Facets.

2. In the Navigation pane, select a location for the facet:

    * To create a global facet, click the Global Facets folder.

    * To create a catalog facet, click a catalog.

    * To create a category facet, click a category.

    Sites, catalog folders, products, and SKUs cannot be selected as locations for facets. They are added to the tree for navigational purposes only and appear in the tree only in multisite environments.

3. In the Details pane, click the Add New button.

4. Select the property that you want to use as the basis for your facet from the Faceting Property list.

    This list contains all properties that have been indexed as meta-properties in ATG Search. Your ATG Search administrator can modify the properties available as faceting properties. See the *ATG Search Administration Guide*.

    The search index usually includes both product properties and SKU properties, so the Faceting Property list usually contains both. If a product has two SKUs, each a different color, a color facet will represent the product twice in its selections: once for each color.

Tip: A facet is useful only if it contains more than one selection. A facet will not be displayed on your Web site if all products it affects have the same value for the faceting property. For example, an On Sale facet will not appear if all the products in the catalog have the onSale property set to True.

5. Type a descriptive name for the facet in the Name box.

   Depending on how your ATG Commerce site pages are coded, the name you enter here may appear as the facet label on the Web site or it may map to a label in a properties file.

6. (Optional) Enter a number (0 or a positive integer) that specifies the facet priority. The larger the number is, the lower the priority.

   Priority values determine the order in which facets appear on the Web site page. For example, if a Color facet has a priority 0 and a Size facet has a priority 3, the Color facet is returned before the Size facet. If the page code does not reorder the facets, the Color facet is displayed above the Size facet.

   If you do not enter a priority value, the facet's priority is set to the default value, which is initially set at 100, but can be changed by your administrator. The default value is not shown in the UI, but it is used by ATG Search when it processes facets.

   If two facets have the same priority set, they can be shown in different order on your Web sites.

7. Define Selections properties. See Defining Facet Selections (page 167).

8. Under Presentation, select a sort order for facet selections:

   • Numeric/Alphanumeric: Arranges selections in ascending alphanumeric order, that is, 0-9 and A-Z.

     When a number is stored as text and you choose this option, the selections are alphabetized, not listed in numerical order. For example, 12 would appear before 2. In a situation like this, choose the specified order sorting option instead.

   • Value count: Arranges selections in descending order, by the number of search results in each selection. The selection with the most results appears first and the selection with fewest results appears last.

   • Specified order: Arranges selections in the order of faceting property values in the Specified Faceting Property Values list.

     This option is available only if you selected One Faceting Selection for Each Property Value in step 7. See One Selection for Each Faceting Property Value (page 168) for more information about creating the Specified Faceting Property Values list.

9. Click Create or Create & Close to create the facet. To cancel your changes, click Cancel.

10. (Optional) Create child facets that appear when a user chooses a selection from this facet. For example, if a user chooses a price range of $100-$200, a child facet might display more specific price ranges, such as $100-$110 and $110-$120. See Creating Child Facets (page 170).

Defining Facet Selections

When defining a facet, specify the type of selections that you want it to display and how you want ATG Search to determine those selections. You can create a list of single values, such as shoe sizes, or a list of value ranges, such as price ranges. If you choose to create ranges, you can let ATG dynamically create them, provide guidelines for creating them, or specify the exact ranges that you want to appear.

One Selection for Each Faceting Property Value

This option creates one selection for each value of the faceting property. In a brand facet, for example, each selection represents one brand name. This option works well with enumeration properties or properties that have the same value across many products, such as color or size properties.

The following example shows one selection for each value of the Color property:

To create one selection for each faceting property value:

1. Follow steps 1 through 6 in the procedure Creating Facets (page 166).

2. In the Selections section, choose One Selection for Each Faceting Property Value.

3. (Optional) Include specific selections to display and set the order in which they appear:

    Note: The values you specify here display on your Web site, even if those selections do not contain any products.

    *   Click the Add button for Specified Faceting Property Values.

        Type a property value that you want to appear in the facet, exactly as it appears in your product catalog.

        Type a number in the Priority box that specifies the priority of this value in the display order.

        Click Add again and continue adding values until you have created a complete list of the selections you want to appear.

    *   To remove an item, click its delete icon.

4. (Optional) Prevent specific selections from displaying:

    Note: The values you specify here are not displayed on your Web site. If a property value exists in both the Specified and Excluded Facet Values lists, it will be excluded from your site. Null values are excluded automatically.

    *   Click the Add button for Excluded Faceting Property Values.

        Type a property value that you want to exclude from the facet, exactly as it appears in your product catalog.

        Click Add again and continue adding values until you have created a complete list of the selections you want to exclude.

    *   To remove an item, click its delete icon.

5. Continue with step 8 in the procedure Creating Facets (page 166).

Dynamic Selections

The Dynamic Selections option creates a range of values for each selection and automatically groups selections based on the available values of the property. For example, if the facet is based on the name of the products, dynamic selections groups the names alphabetically: A-F, G-L, M-R, and so on.

This option requires you to specify the following properties. ATG uses these properties to calculate number of selections displayed and the number of products each selection contains:

- The maximum number of selections allowed for the facet.

- The minimum number of values that each range must contain.

- The minimum span of letters or numbers for each range. For example, a minimum span of 3 letters generates, at minimum, ranges of A-C, D-F, and so on.

The following example shows a price facet created using dynamic selections. The maximum number of selections is 5, the minimum number of values per selection is 0, the minimum numerical span is 20, and the selections are rounded to the nearest 10.

To create dynamic selections:

1. Follow steps 1 through 6 in the procedure Creating Facets (page 166).

2. In the Selections section, choose Dynamic selections.

3. Type a number in the Maximum Number of Selections box. For example, if you enter 10 for a price facet, no more than ten price ranges will display.

4. Type a number in the Minimum Faceting Property Values Per Selection box. For example, if you enter 5, each selection must contain at least five values.

   This setting determines the minimum number of values per selection, not products per selection. More than one product can have the same value. For example, for a Price facet, setting this property to 5 indicates that each selection must include products that span at least five different price values.

5. Type a number in the Minimum Span of Letters|Numbers Per Selection box. For example, setting this property to 3 permits selections with ranges no smaller than A-C, D-F, G-I, and so on.

6. (Optional) If the faceting property is a number, type a number in the Round Selection Values To Nearest box. For example, rounding to the nearest 10 displays the range $9.60-$16.89 as $10-$20.

7. Continue with step 8 in the procedure Creating Facets (page 166).

Guided Selection Ranges

The guided selection ranges option automatically divides selections into ranges you specify. For example, specifying three selections and a numerical span of five creates ranges 1-5, 6-10, and 11-15. This option is available for numeric values only.

Note: If there are no items that match a property value, then that value is excluded from the selection ranges.

To create guided selection ranges:

1. Follow steps 1 through 6 in the procedure Creating Facets (page 166).

2. In the Selections section, choose Guided Selection Ranges.

3. Type a number in the Number Of Selections box. For example, if you enter 10 for a price facet, there will be ten price ranges.

4. Type a number in the Numerical Size Of Selections box. This values you want represented in each selection. For example, setting this property to 5 permits groupings of 1-5, 6-10, and so on.

5. Continue with step 8 in the procedure Creating Facets (page 166).

Specified Selections

The specified selections option lets you set specific ranges that you want to appear as facet selections on your Web site. This option is available for numeric values only. Each selection is made up of a range that begins and ends with the points you specify. The end point for one selection is the starting point of the next. For example, specifying points 1, 8, 23, and 66 produces selections 1-8, 8-23, and 23-66.

To create specified selections ranges:

1. Follow steps 1 through 6 in the procedure Creating Facets (page 166).

2. In the Selections section, choose Specified Selections.

3. Type the first range point and click Add Range Point. This sets the first value in the first range.

4. To add an end point, type another number, and click Add Range Point. This sets the end point for the first range and the starting point for the next range.

5. Repeat steps 3 and 4 until the end points for each selection are defined. Remember that the end point for one selection is the start point for the next selection.

6. Continue to step 8 in the procedure Creating Facets (page 166).

Creating Child Facets

Nested facets allow shoppers to progressively refine their search results. You do not have to use the same faceting property for both parent and child facets. For example, a Web site that sells shoes might include a Width facet nested in a Size facet; when a shopper clicks a shoe size, a selection of shoe widths appears.

A facet that appears nested on a site also appears nested in Facets view. In the following illustration, a price facet with a $10 increment is nested in a price facet with $100 increments, while Manufacturer Name is an independent facet:
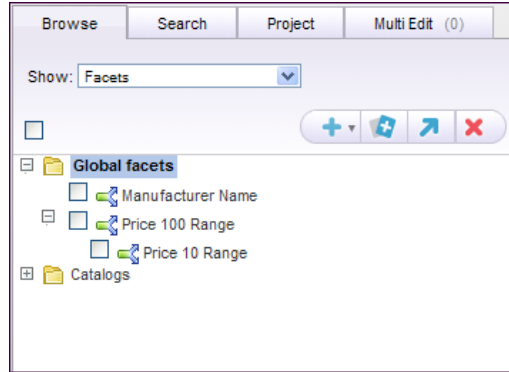
When you move or delete a parent facet, all its children are moved or deleted, too. If you want to delete a parent facet but keep a child facet, move the child to another location. See for more information.

Creating a Child Facet

This section describes how to create a new child facet. To make an existing facet a child of another facet, see .

To create a new child facet:

1. In a Merchandising project, navigate to Search Merchandising and show Facets.

2. In the Navigation pane, select the facet you want to be the parent.

3. In the Details pane for the parent facet, click the Child Facets tab and click Add New.

4. Specify the properties of the new child facet. See .

Moving, Copying, and Deleting Facets

Moving Facets

You can move any facet to another location in the Facets tree. Moving a facet to/from a shared catalog or category moves it to/from all shared locations. Moving a parent facet also moves its children. Moving or deleting a child facet does not affect its parents.

To move a facet:

1. In a Merchandising project, navigate to Search Merchandising and show Facets.

2. In the Navigation pane, click the check box next to the facet that you want to move.

3. Click the Move and choose an option:

   • Move from selected location

- Move from all locations

4. In the Select Destination dialog, use the Search tab or the Browse tab to locate and select the facet where you want to nest the child facet. Click OK.

Copying Facets

You can copy any facet to another location in the Facets tree. Copying a facet to/from a shared catalog or category copies it to/from all shared locations. Copying a parent facet also moves its children. Copying a child facet does not affect its parents.

To copy a facet:

1. In a Merchandising project, navigate to Search Merchandising and show Facets.

2. In the Navigation pane, click the check box next to the facet that you want to copy.

3. Click the Duplicate icon.

4. In the Select Destination dialog, use the Search tab or the Browse tab to locate and select the facet where you want to nest the child facet. Click OK.

Deleting Facets

You can delete any facet in the Facets tree. Deleting a facet from a shared catalog or category deletes it from all shared locations. Deleting a parent facet also deletes its children. Deleting a child facet does not affect its parents.

To delete a facet:

1. In a Merchandising project, navigate to Search Merchandising and show Facets.

2. In the Navigation pane, click the check box next to the facet that you want to delete.

3. Click the Delete icon.

4. Click OK in the confirmation dialog to delete the facet or click Cancel to leave the facet unchanged.

Facet Inheritance

Facet inheritance settings control how a catalog or category inherits facets from a parent.

- Global facets are, by default, inherited by all catalogs or sets of linked catalogs.

- Catalog facets can be inherited by a catalog's categories and subcatalogs.

- Category facets can be inherited by a category's subcategories.

For example, the following illustration shows a catalog hierarchy that contains a root catalog called Master Catalog and its subcatalog, Womens Clothing. The Master Catalog contains a catalog facet, master_catalog_facet. The Womens Clothing catalog also contains a catalog facet, womens_clothing_facet.
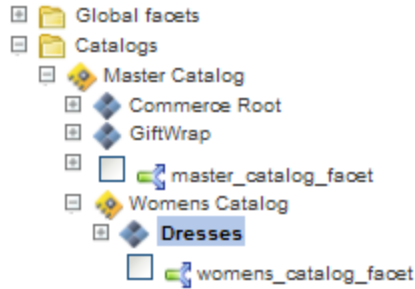
If the property that is used in defining a facet in the "parent/ancestor" catalog is not available in the "child" catalog that facet will not be available when browsing the categories of the child catalog. Referring back to the example above, if master_catalog_facet used faceting property "style" and that property was not defined for the products and SKUs in Womens Catalog, then when browsing to Dresses the user will not see master_catalog_facet.

If a facet is blocked from a category or catalog, it is automatically blocked from all of its subcategories and subcatalogs.

A subcatalog can inherit catalog facets from parent catalogs, regardless of whether the parents are associated with your user profile.

Note: This behavior does not apply to Category facets. A subcatalog does not inherit category facets from categories in a parent catalog if the parent is not in the user's profile.

For example, the following illustration shows a catalog hierarchy that contains a root catalog called Master Catalog and its subcatalog, Womens Clothing. The Master Catalog contains a catalog facet, master_catalog_facet. The Womens Clothing catalog also contains a catalog facet, womens_catalog_facet.
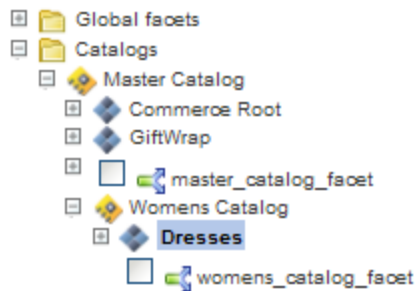
The Womens Catalog is associated with a merchandiser's profile, but the Master Catalog is not. The merchandiser navigates to the Dresses category and selects Inherit facets from parent categories. The womens_catalog_facet appears in the list of inherited facets.
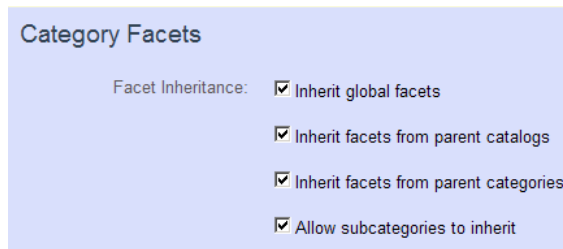
If you are unsure about which catalogs are associated with your user profile, ask your administrator.

Setting Facet Inheritance

To set the facet inheritance options for a catalog or category:

1. In a Merchandising project, navigate to Search Merchandising and show Facets.

2. In the Navigation pane, select a catalog or category whose inheritance options you want to work with.

3. If the catalog or category has more than one parent catalog, select one from the Select a parent catalog dropdown menu.

   The inherited facets appear in the Details pane.

4. (Optional) Review the Inherited Facets list to see all facets inherited by this catalog or category. You can click the name of an inherited facet to view or edit its details.

5. Select one or more Facet Inheritance options:

   These options specify how the catalog or category inherits from its parents:

   • Inherit global facets: Include global facets in the facet set for this catalog or category.

   • Inherit facets from parent catalogs: Include the catalog facets from all parent catalogs in the facet set for this catalog or category.

   • Inherit facets from parent categories: Include the category facets from all parent categories in the facet set for this category.

   These options specify how children of the catalog or category inherit from it:

   • Allow subcategories to inherit: Local facets for this category are included in the facet set of its subcategories.

   • Allow subcatalogs and subcategories to inherit: Local facets for this catalog are included in the facet set of its subcatalogs and subcategories.

   Note: Your administrator may have configured Merchandising to apply catalog and category facet inheritance settings only if a catalog or category contains at least one local facet of its own. In this case, you can still specify facet inheritance settings, but Merchandising ignores them. If you specified a catalog or category to include inherited facets but you see that it does not when you preview your changes, contact your administrator.

6. Click Save.

17 Defining Search Configurations

The Search Merchandising feature enables ATG Commerce sites to customize search results based on site initiatives and customer purchasing patterns. You use Merchandising to create *search configurations*, which are sets of rules that determine the order of search results and which items are excluded from the results.

Before you can define search configurations, an administrator must perform the following tasks:

1. Determine the structure for the search configuration tree, which involves deciding how to organize search configurations and search configuration folders, the dimensions and dimension values held by each, and the base search configurations to create.

2. Create the search configuration folders, sets up the dimension language, segment, and site values, and select the properties that can affect result ordering using property prioritization.

Once these tasks are complete, you can perform the following tasks.

1. Create base search configurations and specify the rules and settings they use.

2. Create search configurations and specify the rules and settings they use.

3. (Optional) Run search tests that list the results that would appear on the Web site if that search configuration were deployed.

Search Configurations in a Multisite Environment

In a multisite environment, a new search configuration dimension called Site lets you target specific search results to visitors searching from specific registered sites. This additional dimension allows search configurations to be organized by segment, language, and/or site. For more information, see the *ATG Merchandising Administration Guide*.

A Site property in Result Prioritization gives you the option to assign weight to a specified site in a multisite environment. This affects how results are organized by site among the entire set of search results. For more information, see .

Creating Search Configurations and Base Search Configurations

An individual search configuration can include any number of rules and settings, and for some sites, the various search configurations may differ only in a few of the rules. For example, you might want to include rules in every search configuration to exclude items that are not in stock. To avoid having to create the same rules repeatedly, you can use a special type of search configuration called a *base search configuration*. A base search configuration is like a template of settings that can be associated with any number of standard search configurations. Unlike a standard search configuration, a base search configuration is never applied directly to a search query.

To use a base search configuration, you associate it with one or more standard search configurations and then select, in the standard search configuration, which settings to inherit and which to override.

A search configuration can use only those base search configurations that don't have conflicting languages. The languages need not be identical: a search configuration that supports US English can have a base configuration supporting English or Any language. Likewise, a search configuration that supports any language that has All Others as its language value can use any base search configuration.

The order in which you create your search configurations and base configurations has no significance, assuming that search configuration folders have been created already by your site administrator. (For instructions on creating search configuration folders, see the *ATG Merchandising Administration Guide*.) You may, however, find it easier to create base search configurations first, especially if you define them immediately after creating them. That way, when you create the search configurations, you can associate a base configuration immediately and see the inherited settings.

Creating Base Search Configurations

A base search configuration acts as a template by providing settings that are inherited and may be overridden by the search configurations with which it is associated. Using one base search configuration for multiple search configurations saves you time when you're defining settings. Be sure to assign a language to your base search configuration that coincides with the language held by one or more search configurations, which may specify a language directly or inherit it from a search configuration folder. You can assign "Any" as the language for a base search configuration to ensure that it's available to all search configurations.

To create a base search configuration:

1. In Base Search Configurations view of the Browse tab, click the Create New button and choose Base Search Configuration.

   The Details pane displays empty text boxes you will fill with information about the base search configuration.

2. In the Name textbox, provide a name for the base search configuration. Providing a name that identifies the language used by the base search configuration will help to distinguish it from others.

3. From the Language dropdown menu, select a language or "Any." The languages you see in the list are provided by your site administrator.

4. Click Create.

Once you have created a base search configuration, provide settings to it, as described in the *Defining Search Configurations* (page 175) section.

Creating Search Configurations

Before you create search configurations, an administrator must have already created a search configuration tree. When you create a search configuration, you specify a name and, optionally, a base configuration.

If you want to have multiple search configurations, you need to create them in a search configuration folder. Each search configuration folder specifies a dimension type for which the search configurations it contains must provide a value. For example, a search folder with a dimension type of segment holds search configurations that each apply to a unique segment.

To create a search configuration:

1. In Search Configuration Tree view of the Browse tab, click the Create New button and choose Search Configuration.

   The Details pane displays empty text boxes you will fill with information about the configuration.

2. In the Name text box, provide a name for the search configuration. Providing a name that identifies the dimension value used by this search configuration will help to distinguish it from others.

3. If you want the search configuration to exist in a folder, complete these tasks:

   • Check to see if there's a search configuration folder name beside Select Parent. If you don't see a name or you don't see the name of the search configuration folder that should hold the search configuration you're creating, click Select Parent and, once the Select an Item dialog box opens, click the radio button beside your preferred parent. Click OK.

   • You'll see a dropdown menu named for the type of dimension used by the parent folder – Language or Segment. Select the dimension value from this dropdown menu. The options in this list represent the values for that dimension type that have not been assigned to other search configurations in the same tree branch.

4. If you want your search configuration to base its settings on those supplied by a base search configuration, click Select beside the Inherit From Base textbox to open the Select an Item dialog box. Click the radio button beside the base search configuration, then click OK.

5. A secondary dialog box prompts you to determine whether you also want to use settings for the Result Prioritization tab from the base search configuration. If you performed these tasks in a different order than recommended here and have already provided settings to the Result Prioritization tab, accepting settings from the base configuration will override the current settings.

6. Click Create.

Define the settings on the search configurations tabs as described in the *Defining Search Configurations* (page 175).

A key aspect of the Search Merchandising feature is the use of search configuration files. These are XML files that represent sets of ATG Search query rules that specify how to order the search results and to exclude certain results entirely, based on terms in the search query and values of the properties of the returned items. For example, a search configuration might specify that less expensive items should be displayed first, and that if the query contains the word "bargain", all items whose price is above $100.00 should be excluded from the results.

An administrative user creates the folders that make up the search configuration tree. The merchandiser then creates search configurations to populate these folders. The Merchandising UI includes a set of five tabs for defining the various settings that make up a search configuration. The following table describes the tasks you can perform on each of these tabs:

Tab	Task
General	Specify the name of the search configuration and either the language or segment value (depending on the tree structure).
Redirection	Define rules for redirecting to other pages rather than displaying search results.
Result Prioritization	Specify the ordering of the results based on the relative rankings assigned to property prioritization, search term relevance, and search term property match.
Result Exclusion	Define rules for excluding certain items from the search results.
Result Positioning	Define rules for moving certain items higher on the list of search results.

The settings are applied in the order listed in the table. So, for example, if product A gets moved to the top of the search results based on result prioritization, and then product B gets moved to the top based on result positioning, then product B will end up ahead of product A.

This chapter includes the following sections:

Once you've created search configurations and provided settings, you can see how ATG Search applies them to searches on your Web site, by running sample search tests as described in .

Inheriting Settings from Base Search Configurations

When you create a search configuration, you have the option of associating it with a base search configuration. A base search configuration is like a template that provides settings that can be inherited by standard search configurations. A base search configuration cannot be applied to a search query directly, but standard search configurations that inherit settings from it can be.

You can create any number of base search configurations, and any number of standard search configurations can inherit from a single base search configuration. Note, however, than an individual standard search configuration can inherit from only one base search configuration.

When you define the settings for a standard search configuration that inherits from a base search configuration, you can decide which inherited settings to enable. See and for more information.
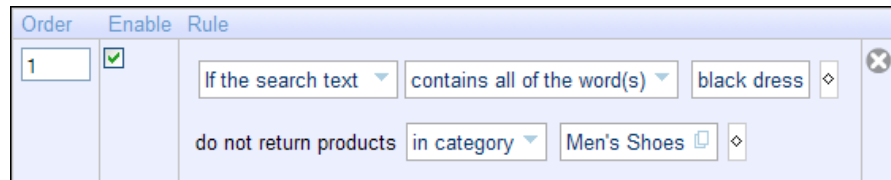
Note that the user interface for specifying the rules and property prioritizations for a base search configuration is virtually identical to the UI for defining standard search configurations. The main difference is that standard search configurations have options for specifying which inherited settings to enable or disable. Base search configurations don't have these options, because a base search configuration cannot inherit from another base search configuration.

Defining Rules

A search configuration has three types of rules: redirection rules, result exclusion rules, and result positioning rules. These rule types are described in the table at the beginning of this chapter, *Defining Search Configurations* (page 175).
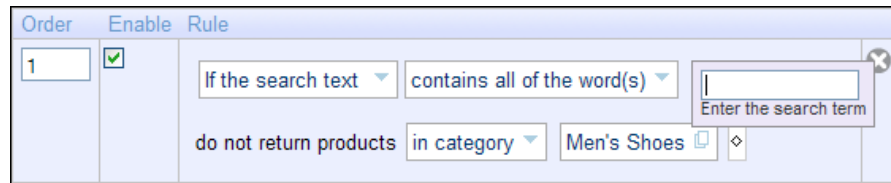
Each rule has two main parts: a condition and an action. When the rule is applied, the condition is evaluated, and if it is true, the action is performed. If the condition is false, the action is not performed.

The following example shows the rule editor for the Result Exclusion tab. In this example, the condition being evaluated is whether the search text contains the exact phrase "fuel injection". If it does, the action—excluding products in the Carburetors category from the search results—is performed.

You create and modify a rule by clicking on portions of the rule that are enclosed in gray boxes. When you click on one of these areas, the editor displays a dropdown menu, a text field, or an asset picker for specifying that portion of the rule. For example:

Products vs. SKUs

Depending on how your site is configured, the results returned by ATG Search can either be products or SKUs. You can use Merchandising to create rules for either of these configurations. The examples in this chapter are based on a site that returns products. If your site is instead configured to return SKUs, you'll see a few differences in the Merchandising UI:

- The word "products" is replaced by "SKUs" in the text of the rules.

- The names of properties appear differently in rules. For example, the description property of a product appears as "Description" if your site returns products, but appears as "Product -> Description" if your site returns SKUs.

Multiple Languages

If your site supports multiple languages, be sure to define rules that match the language that the target site user will search in. This might not be the same language as the language dimension of the search configuration. For example, the All Others dimension value is typically associated with the default language on your site, and text-based rules should be written in that language.

Creating a New Rule

When you first create a search configuration, each rule tab includes one empty rule (that is, a rule for which neither the condition nor the action has been specified). You can create a new rule by editing this empty rule to specify the condition and action.

A search configuration can include multiples rules of each type. For example, a search configuration might have 2 redirection rules, 4 result exclusion rules, and 3 result positioning rules.

To create an additional rule for any of these rule types, display the tab associated with the type and click Add New Rule. An empty rule is added to the tab. For example:

Edit the new rule to specify the condition and action, as described in this chapter.

Specifying the Order of the Rules

Each rule has an Order value that you can modify. These values indicate the order of importance of the rules, not necessarily the actual order in which the rules are applied.

The order in which the rules are applied depends on the type of rule:

• Redirection rules are applied in the order of importance. For example, if there are three redirection rules, ATG Search applies rule 1 first, then rule 2, and then rule 3. This is because only one redirection can be performed for an individual search text; if you have several redirection rules and the site visitor enters search text that matches the conditions of more than one rule, the first rule that it matches is the one that actually takes effect.

• Result positioning rules are applied in the reverse order of importance. For example, if there are three result positioning rules, ATG Search applies rule 3 first, then rule 2, and then rule 1. Since these rules change the ordering of the search results by moving some items to the top of the list, the later a rule is applied, the stronger its effect.

• For result exclusion rules, the order of the rules does not matter. Applying a certain set of exclusion rules produces the same effect, regardless of the order.

Rules inherited from a base search configuration are always treated as being of lower importance than the rules defined in a standard search configuration. So inherited redirection rules are applied after locally defined redirection rules, while inherited result positioning rules are applied before locally defined result positioning rules.

To change the order of the rules in a tab, enter a new number in the Order field of each rule in the tab, and click Save. The rules will be redisplayed on the tab in the order you specified. Note, however, that you cannot change the order of rules inherited from a base search configuration (except by changing them in the base search configuration itself).

Specifying the Condition

When you create a rule, the condition you specify determines which search queries the rule applies to. For result exclusion and result positioning rules, you have the option of creating rules that apply to all search queries. For example, here is a result exclusion rule that applies to all search queries:

To specify a more restrictive condition, click on the first box. A dropdown menu is displayed:

Select If the search text. The editor now displays additional fields for specifying the criteria for determining if a query meets the condition:

Note: The Redirection Rules tab does not have the For all searches option. A redirection rule always begins with If the search text.

Now click on contains all of the word(s). A dropdown menu is displayed:

Select an option from this menu, and then enter text in the text field next to it. The following table describes what each option means and how the text you enter is interpreted:

Option	How the text is interpreted

contains all of the word(s)	The text field contains one or more words, separated by spaces. For the condition to be true, the site visitor must enter search text that includes all of these words. The order of the words in the query does not need to match the order in the text field, and the query can contain additional words that are not in the text field.
	
	For example, if the text field contains:
	
	`red blue green`
	
	The condition is true for this query:
	
	`green trees with blue and red leaves`
	
	But false for this query:
	
	`green trees with red leaves`

contains at least one of the words	The text field contains one or more words, separated by spaces. For the condition to be true, the site visitor must enter search text that includes one or more of these words. The query can contain additional words that are not in the text field.
	
	For example, if the text field contains:
	
	`red blue green`
	
	The condition is true for this query:
	
	`trees with red leaves`
	
	But false for this query:
	
	`purple trees`

contains this exact phrase	The text field contains one or more words, separated by spaces. For the condition to be true, the site visitor must enter search text that includes all of these words, in exactly the order they appear in the text field. The query can contain additional words not in the field, before or after the words in the field.
	
	For example, if the text field contains:
	
	`green leaves`
	
	The condition is true for this query:
	
	`trees with green leaves and red branches`
	
	But false for this query:
	
	`green hairy leaves`

Option	How the text is interpreted

contains only this exact phrase	The text field contains one or more words, separated by spaces. For the condition to be true, the site visitor must enter search text that includes all of these words, in exactly the order they appear in the field. The query cannot contain additional words not in the field.
	
	For example, if the text field contains:
	
	`green leaves`
	
	The condition is true for this query:
	
	`green leaves`
	
	But false for this query:
	
	`trees with green leaves`

matches the query rule pattern	The text is treated as an ATG Search query rule pattern. It can include special characters (such as wildcards) that are interpreted by the search engine. You should use this option only if you are familiar ATG Search query rules. For information, see the *ATG Search Administration Guide*

Specifying Additional Criteria for the Condition

You can define rules that have multiple criteria for evaluating the condition. For example, the criteria might be:

```
If the search text contains the exact phrase black dress or
contains at least one of the words heels
```

In a condition with multiple criteria, the condition is true if any criterion is true. In the example above, a query containing just the word `emissions` is true because it meets the second criterion, even though it doesn't meet the first.

To create a condition with multiple criteria, click on the diamond next to the first criterion, and select or... from the dropdown menu:

Additional fields are displayed for specifying another criterion:

You can add any number of criteria in this way.

Specifying the Action

Each rule has an action that is performed if the search text satisfies the condition. For a redirection rule, the action is to display a certain page, which you specify by entering its URL:
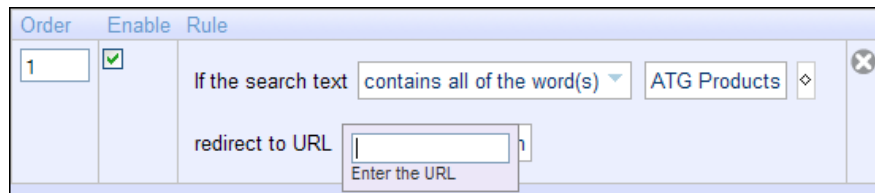
You can enter the URL in one of two forms:

• Specify the URL relative to the top level of your site. For example:

    /products/gifts/diamonds.jsp

• Specify the complete URL, including the protocol (such as `http` or `https`). For example:

    http://www.mysite.com/products/shoes/index.jsp

For a result exclusion rule, the action initially looks like this:
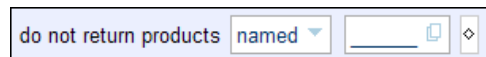
The action for a result positioning rule looks similar:
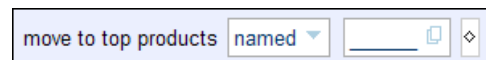
To specify the action for a result exclusion rule or result positioning rule, click on named. A dropdown menu is displayed:
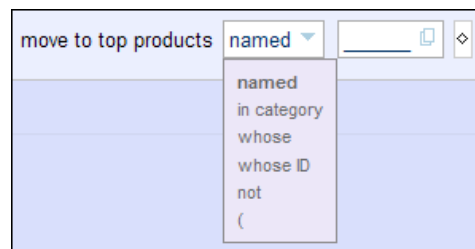
Select an option from the menu. Depending on the option you select, different fields will appear for specifying the products that the action should be applied to. These fields provide tools such as text boxes or asset pickers for specifying the appropriate values. For example, if you select in category, a blank field is displayed to the right of the option; clicking on this field displays an asset picker for selecting the category.

The not and parenthesis [(] options can be useful for specifying complex logic. For example, if you want to move to top all items except those in a specific category or with a specific name, you could create a rule with an action like this:

Specifying Additional Criteria for the Action

You can specify multiple criteria for determining which products the action applies to. For example, the criteria might be:

```
do not return skus in category Men's Shoes or whose
Stock Availability Status is Out of Stock
```

This action excludes from the search results all products that are out of stock, as well as all products in the category Men's Shoes (assuming, of course, that the query matches the condition).

To create an action with multiple criteria, click on the diamond next to the first criterion, and select or and from the dropdown menu:

Additional fields are displayed for specifying another criterion:

You can add any number of criteria in this way, combined using and or. It is important to understand the differences in the resulting logic:

• If the criteria are all combined using or, the action is applied to items that meet *any* of the criteria.

• If the criteria are all combined using and, the action is applied to items that meet *all* of the criteria.

It is possible to create very complex expressions for selecting the items to apply the action to. You should make sure that the rules you create actually encapsulate the logic you want. For example, if there are three or more criteria, and some are combined using and others are combined using or, it is a good idea to use parentheses to ensure that the criteria are interpreted in the way you expect.

Disabling and Deleting Rules

If a search configuration contains a rule that you no longer want to apply to search results, you can delete it by clicking the red X to the right of the rule. Note, however, that you cannot delete a rule inherited from a base search configuration (except by deleting it in the base search configuration itself).

In some cases, you may have rules that you want to apply at certain times but not at others (e.g., rules that apply in spring and fall but not during other seasons). Rather than periodically deleting these rules and then recreating them later, you can simply disable them at times when you don't want them to be applied, and enable them when you do. To disable a rule, uncheck the Enable Rule checkbox to the left of the rule. To enable a rule, check the Enable Rule checkbox.

Applying Inherited Rules

If you associate a search configuration with a base search configuration, then the rules inherited from the base search configuration are displayed on the corresponding rule tabs of the standard search configuration. For example:

By default, inherited rules are enabled. If you don't want the search configuration to use an inherited rule, uncheck the Enable Rule checkbox.

Influencing the Order of Results

In Search Merchandising, you can influence the order of search results by configuring the three most significant factors:

- Search term relevance

- Search term property match

- Property prioritization

If the purpose of a search engine is to locate the results that match the search text, the best results are those in which the search text appears and appears often. For example, if you search for "hand blender," you can expect that the product with the most mentions of "hand blender" to be the first in the results list. Similarly, if the search dictionary defines "automated chopper" as a synonym for "hand blender," products described as automated choppers might also be returned in the result set, although it's likely they'll appear after products that use the exact search term. This behavior is governed by a factor called *search term relevance*, which also takes into account word order and linguistic usage. When no search configurations or facets are defined, ATG Search uses search term relevance to determine the ordering of the result set.

Whereas search term relevance orders results by evaluating the overall usages of the search text, the second factor, *search term property match*, orders products based on the appearance of the search terms in specific property values. For example, if the Display name property has a high priority, the product that has "handle blender" in its Display name might appear among the first results in the list. When you use search term property match, you specify rankings to specific properties.

Unlike the other two factors, for *property prioritization*, the search text less relevant. You use property prioritization to promote certain products by identifying properties and values and supplying rankings that will control the placement of products with those property values. For example, you might give a high ranking to a particular brand or a low ranking to products that are backordered.

The following sections provide instructions for working with search term relevance, search term property match, and property prioritization:

- Determine the influence of each factor relative to others. See Assigning Percentage Weights (page 187).

- For property prioritization, provide rankings to specific properties and weightings to property values. See Specifying the Priority of Properties (page 188).

- For search term property match, provide rankings to searchable properties. See Ranking of Searchable Properties (page 193).

- Copy settings from an existing resource. See Copying Result Prioritization Settings from Another Search Configuration (page 193).

- Inherit settings from a Base Search Configuration. See Applying Inherited Result Prioritization Settings (page 194).

Assigning Percentage Weights

Percentage weights determine the relative importance of each factor in determining the order of search results. Consider the following guidelines before providing percentages to each factor:

Factor	Guidelines
Property Prioritization	This factor is useful when searches return a large number of results, and you want to promote products with particular characteristics, such as a brand or inventory status. Typically, property prioritization should not be assigned 100% weighting or have a higher weighting than search term relevance or search term property match to ensure that the first results users see are related to the search text they entered.

Factor	Guidelines
Search Term Relevance	When you don't know how users search or what they are looking for, provide a high percentage to this factor to ensure that users see the products that include the search text the most often. You are strongly cautioned against giving this factor 0% because doing so inflates the importance of other factors, which may cause the results to be ordered in a way that won't be intuitive to users.
Search Term Property Match	Knowing how the search text users enter matches the content structure of your catalog is a key requirement for using this factor. Are users likely to enter, for example, a product name, style, or size as search text? Or are they likely to enter descriptive phrases? You must be able to identify important properties for your catalog, which contain the information that users are attempting to specify in search text, as well as less important properties, which may match search text accidentally. For example, Display name might be an important property that you choose to promote, and Description might be a less important property that you choose to demote. Because this factor bases result placement on search term usage in specific properties, it is most helpful for distinguishing between products in large, diverse catalogs where search text could otherwise be ambiguous.

To assign a percentage weight, click the Result Prioritization tab:

Enter the percentage weight for property prioritization, search term relevance, and search term property match. Note that percentages need not be equal, and it's acceptable to keep a factor at 0%. After you click outside of percentage textbox, the total is immediately recalculated both on the top right and at the very bottom of the tab. You can save your changes and exit the tab only after the percentages add up to 100%.

Specifying the Priority of Properties

You use the Property Prioritization tab to specify the priority of different properties for influencing the order of search results. The priority of a property takes into account the weighting of the property relative to other properties, and the ranking of the property's values relative to each other (e.g., whether high values are considered "better" or "worse" than low values). For example, you might specify that price is the highest-priority property of products, and that high-priced products should be emphasized. When the search configuration is applied, higher-priced products will tend to appear higher on the list of search results than lower-priced products. Note that the best way to promote specific products, rather than specific characteristics, is to use positioning rules.

An administrative user configures the Merchandising UI to make certain properties available for specifying their priorities. These properties are displayed in a table on the Result Prioritization tab. For example:

To specify the weighting of a property, use the slider in the Search Results Weight column. The slider can move through eleven positions, each of which represents the influence a property has in the overall result ordering. Each property's influence depends both on the influence of other properties in property prioritization as well as the overall percentage assigned to property prioritization. As you make changes to a slider for one property prioritization property, you'll not only see the percentage for it change but also the percentage for all other property prioritization properties change.

For example, suppose you set property prioritization to 30%, search term relevance to 40% and search term property match to 30%. The initial setting for each property is the first position, ignore, which means the property is not considered when determining the order of search results.

If you have three properties and move the slider for one of them to the last position, the entire 30% of your property prioritization allocation will be applied for that one property.

If you move the slider for a second property into the same position, the first two properties will have 15% each until you move the slider for the third to the same spot, causing all three properties to have 10%.

What the sliders demonstrate is how the influence of a property is relative to the influence of other properties. As you use the sliders, the specific position of the slider is not as important as the percentage that position gives to a given property in relation to others.

For each property, text appears in the Property Value Ranking column describing the criteria for ranking the property values. The text in this column is a link to a screen where you can specify the criteria for ranking the property's values. For properties with a fixed set of possible values (such as On sale and Stock Availability Status in this example), the software can automatically assign rankings to the values, though you may want to click the link to change these, because the default rankings may not be what you want. For properties whose ranking criteria cannot be determined automatically (such as Brand), the text link Rank these values appears. In this case, you must click the link to specify further ranking information.

Specifying the Ranking of Property Values

To rank property values, you first need to allocate a percentage weight to that property, by moving the slide beneath it. A link appears in the Property Value Ranking column, and by clicking it, you'll see a page that

provides the tools you need to rank values. What you see depends on the data type for the property you're working with:

Data Type	Options
Numeric	You can specify that higher values are better (have higher ranking) or that lower values are better. If you select one of these options, you must also specify the minimum and maximum expected values for the property. The other option is to divide up the data into ranges and then specify a relative ranking for each range. Numbers outside of a specified range use the ranking given to "All Others."
Date	You can specify that earlier dates are better (have higher ranking) or that later dates are better. If you select one of these options, you must also specify the earliest and latest expected dates. Dates outside of this range use the ranking given to "All Others." The other option is to divide up the dates into ranges and then specify a relative ranking for each range.
Text	You can specify a set of text values (e.g., `red`, `green`, and `blue`, for a `color` property) and a relative ranking for each value.
Enumeration	An enumeration is a property with a fixed set of possible values (e.g., a "days of the week" property would have 7 possible values). You can specify a relative ranking for each value.
Boolean	A Boolean is a property with whose value is either `true` or `false`. You can specify the relative ranking for the two values.

To specify ranges of rankings to text properties and some numeric and date properties, you use the Add button to add an entry in the table, and then provide a ranking and value or value range as needed. You can add entries in any order, and when you want to organize the table in rank order (strongest to weakest), click the Reorder button.

For every property value type, you have the option of specifying value ranges and number rankings that order the importance of each range relative to others. Consider the Creation Date property which uses Date data type. In order to promote new seasonal items, you might create the following ranges:

That way, customers see the newest items created for spring before other items. Notice that the All Other Values is last in the list, so items created at any date other than one included in the specified ranges will appear later in the list.

When you are defining ranges, the All Other Values option automatically appears at the top of a list but can be moved to any position as shown in the previous example. If you want to hide products created in the winter of 2007-2008, you might move the All Other Values to a middle position, for example:

In these examples, rankings are unique and consecutive although they needn't be. Giving two property values the same ranking means that for this one criterion, ATG Search sets them as equals. Keep in mind, however, that a ranking is one of several settings that determine a result's place in the results list.

Nonconsecutive rankings work much like nonconsecutive weightings. Consider the following example:

In addition to providing a relative order, ranking provides a relative distance that determines how far apart results appear from others. Products created during November-February 2006 (with a ranking of 12) will appear significantly lower – as much as 3 times lower - in the results list than those created on a date that doesn't fall into a specified range (with a ranking of 4). A ranking setting's exact influence on a search result's position may be difficult to determine because it incorporates a number of factors, such as property weightings and the order of the result list before search configuration settings are applied.

When you specify rankings, it's important to know exactly what effect you are trying to define. For example, you would create the rankings in the prior example if you want products created in the winter of 2005-2006 to display, but to display after all others. If you don't want such products to display at all, it's best to use a result positioning or exclusion rule to hide them rather than specify a wide range of rankings here. Giving winter products a ranking of 100, for example, serves to eliminate the distinctions between the ranges that are ranked closely together (spring products for 2007, 2006, and 2005) rather than de-emphasize the winter products.

Ranking of Searchable Properties

When you use search term property match, you need to identify the properties in which ATG Search will look for a match to the search text. The properties available to you are the complete set of searchable properties used by ATG Search, and they are defined in the indexing definition file as text properties. You also need to provide rankings to those properties. When you are selecting properties, give high rankings to properties with descriptive text that's common for searching but also uniquely identifies a given product or distinguishes it from others. For example, ID might be too specific and description might be too general, so both properties might be ranked lower than display name. The properties you choose depend on your catalog and how you anticipate users will search it.

Once you've supplied a percentage to search term property match other than 0, a link called Ranked List of Searchable Properties appears at the bottom of the Result Prioritization tab. Click the link to open a screen for selecting properties and providing rankings. Initially, there's just one row in the table, and it represents all properties that have not been specified. It's a good idea to change the ranking of this value, so other properties are ranked higher than it is.

To designate a property, click the Add Row button, then select a property from the dropdown menu in the Value column. Provide a ranking in the ranking column, knowing that products with low numbers have more influence than those with high numbers. In this example, ATG Search first checks the display name property, the keywords property second, and the brief description property third. Next it checks all other properties, before considering the description property last.

Each row column also has a strength which is how ATG Search interprets the ranking you've provided relative to the rankings of other properties. As is the case with property prioritization, the ranking integer isn't as important as how it relates to others. Giving one property a weighting of 5 and another 10 separates them farther in the results list than if their weightings were 5 and 6 respectively. Use the Reorder button at any time to organize the table based on highest ranking to lowest. When you are finished, click Save & Close to return to the Result Prioritization tab.

This display is similar to the display used for ranking values of properties selected for property prioritization described in Specifying the Ranking of Property Values (page 190). You'll find more information on the All Others value as well as additional examples of how to set up rankings in that section.

Copying Result Prioritization Settings from Another Search Configuration

If you have multiple search configurations that require similar result prioritization settings, you can copy the settings from an existing search configuration into the one you're editing. To do this, click the Copy Settings From button on the Result Prioritization tab. This displays an asset picker that you can use to select the search configuration to copy the settings from. All of the weightings and rankings are copied from the search configuration you select.

There are similar Copy Settings From buttons when you define rankings for properties used in property prioritization as well as when you provide rankings to searchable properties for search term property match. These options copy just the rankings for the one property, not the weightings and rankings for all the properties.

Note that in either case the settings are simply copied; the two search configurations are not associated in any way. If you subsequently change the settings in one of the search configurations, this has no effect on the settings in the other one. (This is different from inheriting settings from a base search configuration. Changing the settings in a base search configuration also changes them in any standard search configuration that inherits them.)

The Copy Settings From button does not appear on the Result Prioritization tab if the search configuration is inheriting prioritization settings from a base search configuration. To display the button, uncheck the Use prioritization settings checkbox on the Result Prioritization tab, as discussed in the next section.

Applying Inherited Result Prioritization Settings

If you associate a search configuration with a base search configuration, by default the search configuration inherits the property prioritization, search term relevance, and search term property match settings from the base search configuration. The screens where you specify rankings for property prioritization property values and searchable property rankings for search term property match displays the inherited settings, but they are not editable. For example:

If you don't want the search configuration to use inherited prioritization settings, uncheck the Use prioritization settings checkbox. This clears the inherited settings and enables you to specify new settings that are local to the search configuration.

Note that a search configuration can inherit either all of the prioritization settings from a base search configuration or none of them. Unlike rules, inherited prioritization settings cannot be enabled or disabled individually.

Moving Search Configurations and Search Configuration Folders

After you create your search configuration tree, you may need to alter the order of the search configurations and search configuration folders it contains. You can move the position of an asset in its given level, but you can't move, for example, a search configuration folder from the top-level of the tree to the second level. If you want to

move an asset in this way, it's best to redefine the asset, if you want to replace it with a different asset, or delete it.

Within a search configuration folder, search configurations and search configuration folders are grouped and managed separately, and when they are on the same level, search configurations always appear above search configuration folders. The out-of-the-box settings permit any user to create and modify search configurations from any Merchandising project. Only administrators can create and move search configuration folders, using a project based on the Administer Commerce Search workflow.

The ordering of the assets in the tree is significant because it reflects the order ATG Search uses to locate the search configuration appropriate for each site visitor. For that reason, you can't move a search configuration or search configuration folder when its dimension value is All Others: it must be last. For more information about the capabilities and restrictions of the tree, see *Structuring the Search Configuration Tree* in the *ATG Merchandising Administration Guide*.

To reorder the search configurations or search configuration folders on a particular level:

1. In Search Configuration Tree view of the Browse tab, click the name of the search configuration folder that holds the assets you want to reposition.

   The Details pane contains properties about the search configuration folder, including a table you can use to reposition its nested assets.

2. In the Details pane, find the table containing the type of asset – search configurations or folders – that you want to reposition. Beside each asset is the number that represents its order in the tree. Provide a new number beside the asset you want to move.

   Note: Specifying 1 gives an asset the first position and moves the asset currently in the first position to the second.

3. To preview the order, click Reorder.

   The order of assets shifts in the Details pane table.

4. Click Save to save the new order.

   The assets in the tree display in the new order you provided.

Deleting Search Merchandising Assets

Merchandising permits you to delete search configurations, base search configurations, and search configuration folders at all times. There are two behaviors to keep in mind:

• Deleting a base search configuration that's associated with a search configuration causes the standard configuration to lose any settings it inherited from the base configuration.

• Deleting a search configuration folder deletes any search configurations it contains.

An administrator must remove segments from the merchandising segment list and remove properties from the Property Prioritization tab.

18   Testing Search Queries

You use search tests to analyze how the search engine processes queries and ranks search results. This information helps you create facets, design search configurations, and edit catalog items so users of your site receive the optimal results when they search for products or information.

This chapter contains the following topics:

Search Testing Overview

A search test allows you to simulate a search performed on a commerce site without having to go to the site itself. You can choose which search criteria you want to test, such as search configurations, search terms, or facets, and the types of test output you want to see. You can even test undeployed search configurations and facets from inside a project. The test output shows you more than just the list of search results. It also shows you detailed search processing information to help you understand why the search results appear as they do.

Unlike many other assets in Merchandising, search tests are not versioned. You can create, edit, and run search tests inside or outside of a project.

Search Testing Environment

The Search Test environment designates a set of one or more machines as being responsible for one of the following tasks:

- Indexing your content. Each Search project has a single environment for indexing, which can be distributed across multiple hosts.

- Answering end-user queries using the deployed index. A project can have any number of environments for this purpose.

Before you run Search tests, you must identify the Search environments that contain the products, SKUs, search configurations, facets, and other search settings you want to test.

Choose the Search Testing environment that best suits the type of test you want to run. To see instructions for creating a test and choosing a Search Testing environment, see Creating a Search Test (page 204).

The Merchandising administrator configures which environments are available for Search Testing and, if there is more than one, which one to use as the default.

Undeployed or Deployed Facets and Search Configurations

You can use Search Testing to test:

- changes you made to facets and search configurations in your project

- deployed facets and search configurations on a commerce site

If you are working in the context of a project, the search test environment includes your undeployed changes by default, but you can change this before you run the test. If you are browsing outside of a project, you can only test deployed facets and search configurations.

You do not need to re-index to test undeployed facets and search configurations. You do, however, have to deploy and index other assets, such as catalog items and price lists, to include them in a search test. If you create a new parent category in your project, for example, and run a search test with the new category as one of your search criteria, you will get an empty result set, even if the category contains indexed products or SKUs. This occurs because the search engine does not recognize the category.

Search tests do, however, take into account undeployed changes that affect category facets and the search configuration tree. Continuing with the example from the previous paragraph, if your new category encompasses existing categories, you could add a facet to the new category and test it by selecting an indexed sub-category that inherits the facet.

To test undeployed facets and search configurations, Merchandising creates a temporary file that contains the undeployed definitions and sends it to the search engine along with the query. The search engine then applies those temporary facets and search configurations to the deployed data in the search index to generate the search results.

If you recently deployed your updated search configurations or facets, an indexing job must be run to update the post-index customizations file before you can test the newly deployed changes. For more information, see the *ATG Search Administration Guide*.

Languages in Search Tests

You can test how language affects search queries and results if your site is configured to support searches in multiple languages. You can test:

- What results a site user sees when the user enters search text in a particular language

- Which search configuration is applied based on a site user's language dimension value

- How rules in a search configuration affect results when search text is entered in one language and the search engine returns results in multiple languages, for example, whether a rule is triggered, whether the search configuration tree is navigated as expected, etc.

The search text language is not the same as the language dimension value used to select search configurations. The search text language tells the search engine which language the search text is written in, while the language dimension value represents a site visitor's language. Usually, your commerce site is configured so that the search text language matches the site visitor's language, but that might not always be the case.

Here are some examples of situations where the language dimension might be different from the search text language:

- A commerce site has search configurations for both French and English language customers, but the site contains only English text and supports only English language searches. In this case, the search configurations in both the French and English language dimensions are associated with the English search index, and, since the site is written only in English, it is assumed that all site visitors search using English language terms.

- There are two versions of a North American commerce site, one in English and one in Spanish. There are three language dimension values for selecting search configurations: English, Spanish, and All Others. The All Others dimension value is associated with the default language, which in this case is English.

When you test search terms in a search configuration and your site supports multiple languages, you choose which search configuration and which search text language to use in the test. As a general rule, the languages of the two should match. Remember, rules in the search configuration that are triggered by a search term cannot be applied if the search text is in a different language Sites in a Search Test

Search Tests in a Multisite Environment

In a multisite environment, you can incorporate site context into your Search Tests. You can:

- Select Site as a dimension when testing search configurations. For more information, see .

- Specify a site to simulate the search on by selecting a site from the Search From menu when you create a Search Test. For more information, see .

- Conduct a cross-site Search Test by specifying that the Search Test should search all registered sites. For more information, see .

Results List Options

When you create your test, you can choose to view a standard list of results, results with ranking calculations for each item, or choose not to display the results list at all if you are testing other factors. If your search engine groups results, you can also choose to see the sub-items, usually SKUs, under each grouped item in the results list. Otherwise, if you choose Standard or Ranking Calculations, you see only the group items and not the sub-items in the result list.

The following table describes the different options for viewing the results list and what they display. Your ATG installation might not support all options. The administrator can customize the information displayed in each type of results list.

Results list option	Description
Standard	Shows the basic list of search results with the ranking score of each item.
	Usually this includes the item's name, position number, item ID, description, and final score. It might also include other properties such as the item's brand or price, depending on what was configured by your administrator. If the search results include items in multiple languages, then the Language column appears and shows the language of the item.

Results list option	Description
Ranking Calculations	Displays the list of search results and information about how the ranking score was calculated for each item based on the search term relevance and any result prioritization rules from a search configuration. If your site groups items, then this output shows the ranking calculations for the highest-ranked sub-item. **Tip:** To see ranking calculations only for specific items, enter the item IDs in the Track Items field and choose the Tracked Item Details output type. See Tracked Item Details (page 217).
Sub-Items	If your site is configured to group SKUs by product, this displays the list of items that are included in each grouping. This result option shows the ranking scores of the individual items in addition to the group-level score. Since the group score is taken from the highest ranking individual item, you can use this option to see how the result ranking was determined when results are grouped.
None	Displays no search results in the test output.

Test Output Types

When you perform a search test, the test output shows you the list of search results that a site user would see in the order that they would appear. To help you analyze the results, you can also choose to include any of several additional output types. For information on interpreting the different types of test output, see Evaluating Test Results (page 208).

The following list describes the additional output types:

- **Search Configuration Details**

  The search configuration details output shows whether a search configuration is applied to the results, and if so, which one and why it was selected.

  You can use this output type to troubleshoot why a search configuration isn't applied to a search, for example, or to test the structure of your search configuration tree.

- **Term Details**

  The term details output shows how the search engine processes query text entered by a site user.

  With this output type, you can test the results of using common synonyms to locate a product, or explore what happens if a site user enters a misspelled word. You can also test the impact of using search term operators, such as a wildcard character or quotation marks around a term.

- **Query Rule Details**

  The query rule details output shows how the search engine applies the redirection, exclusion, and positioning rules defined in a search configuration. It also displays the results of any custom rules defined for your site.

  If query rules change the contents or the order of the results list, you can click a link in the query rule details output to see how the search results would appear if the rules were not applied.

- **Tracked Item Details**

  If you enter an item ID in the Track Items field of the search test, the tracked item details output shows you whether the item appears in the search results and if so, how it appears and why it appears that way.

  You can also use this output type to view a table showing a summary of how the search was processed, regardless of whether you enter items to track. See Search Processing Summary (page 217).

- **Facet Details**

  The facet details output type shows you the facet sets that are applied to the search results and how the facet sets were chosen. You also use this output type to test undeployed facets from your project when you are testing a text-based search. See Testing Undeployed Facets (page 207).

Guidelines for Search Tests

Use the following guidelines to help you create tests that answer questions you might have when using search merchandising.

For instructions on how to create or edit a search test, see Performing Search Tests (page 203). For information on analyzing test results, see Evaluating Test Results (page 208).

To test this	Run this search test
Is the expected search configuration applied to a profile?	Click the Select by Dimensions button and choose the language and segment dimensions you want to test, or if Preview is enabled, choose a Preview Profile to see if the expected configuration is applied.
	Select the Search Configuration Details (page 212) output type.
	After you run the test, the Search Configuration Details output shows whether a search configuration was applied. If so, it shows you which one and how it was selected from the search configuration tree.

To test this	Run this search test
Why is an item that I expected to be excluded by an exclusion rule still appearing in search results?	In the Search Configuration field, select the search configuration that contains the exclusion rule. Or, if you are not sure that the search configuration is being applied as expected, select the dimensions or a preview profile that should trigger the search configuration. Enter the search criteria that you expect to trigger the exclusion rule. Select the Search Configuration Details (page 212) output type and the Query Rule Details (page 215) output type. After you run the test, look at the search configuration output to make sure the search configuration was applied. Then check the query rule details output to see whether the exclusion rule was applied. If not, review the rule and ensure there are no errors or missing search terms. If your site is indexed by SKU, make sure all of the product's SKUs have been excluded.
Are my result prioritization rules working effectively?	In the Search Configuration field, select the search configuration that contains the prioritization rules. Enter your search criteria. From the Results options, choose Ranking Calculations. Select the Query Rule Details (page 215) output type. Review the results list to see how the result prioritization rules impacted the final scores of each item. In the query rule details output, you can see which items are repositioned and where they appear in the results list. To compare the results without the prioritization rules, click Show results without Positioning Rules.
Why isn't a category-level facet appearing when I navigate to that category on my site?	In the Category field, select the category where you created the facet. Select the Facet Details (page 220) output type and click Search. In the facet details output, review the facet sources table to see if an inheritance rule is preventing the facet from being included in the facet set. If it is in the facet set, look at the table of facet selections to see if the facet has been excluded and if so, why.

To test this	Run this search test
Why isn't the facet for the Bath category applied to the search results when I search for the text, `Bath`?	Enter the search term in the Search Text field. Select the Facet Details (page 220) output type and click Search. In the facet details output, look at the Determination of Category table to see whether all search results fall into the expected category. If not, then the category facet is not applied. If the expected category is selected, look for the facet in the facet selections table to be sure that the facet property is in the search index. The facet can also be excluded if there is only one value or range for the current search results.
Why isn't a product appearing in search results? **Note:** You can only test deployed and indexed catalog items.	Enter the search criteria that are expected to return the item in search results. In the Tracked Items field, type the item number of the item that is not appearing in search results, or click Select and choose it from the catalog. Select the Tracked Item Details (page 217) output type. After you run the test, use the tracked item details output to determine why the item is excluded from the search results.
Is the new product I added in the search index so it can appear in search results? **Note:** You can only test deployed and indexed catalog items.	Enter the search criteria that are expected to return the item in search results. Type the item ID in the Track Items field or click Select and choose it from the catalog. Select the Tracked Item Details (page 217) output type. After you run the test, look at the tracked items list to see how the search processed the item. If the word "Unknown" appears in place of the item name, then the item is not in the search index.

Performing Search Tests

This section describes how to create, run, and save search tests.

Creating a Search Test

Depending on what you want to test, you can create a search test in several ways. You can test the outcome of applying new or updated search configurations and facets from inside a project, or troubleshoot a deployed site that is not working as expected. You can also create a search test while editing a facet or search configuration.

To create a search test:

1. In a Merchandising project, navigate to Search Merchandising and show Search Testing.

   To create a search test while editing a facet or search configuration, click the Test Search button in the Details pane.

   To troubleshoot searches for deployed assets without creating a project, navigate to Search Merchandising using the Browse link on the BCC home page. For more information, see [add cross reference].

2. To specify the test environment that contains the products and SKUs you want to test, click Select and pick a content label and target type:

   • The target type identifies the general purpose of the Search project, for example, Production or Staging.

   • The content label identifies the purpose of a content set, such as a catalog or a collection of articles.

   • To include undeployed search configurations and facets from the current project in the test, select the checkbox. This option appears only if you are working in a project.

   • Click the OK button.

   The available Content Label and Target Type options depend on ATG Search settings configured by your administrator.
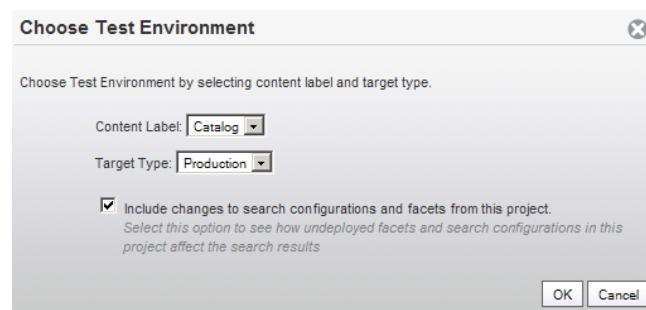
3. If your test environment contains one or more registered sites, select a site from the Search From list. This is the site from which the test query will originate.

   This list includes all registered sites associated with the content label you selected for your test environment.

   Note: if there is only one site registered, no dropdown menu is shown in the Search From control. The site is shown as a label.

4. If you selected a site in the previous step, select Cross Site Search to search all sites in the Search From list.

5. Choose the search inputs you want to test. See Specifying the Search Criteria to Test (page 205).

6. Choose the output types you want to include in the test results. See Test Output Types (page 200).

7. Click the Search button to run the test.

Specifying the Search Criteria to Test

After you create the search test, specify the search criteria you want to include. All test inputs are optional and can be used alone or in combination to test various searches. To return a list of results, however, be sure to include at least a search term or a category. Otherwise the result set will be empty. For suggestions on how to set up your test, see Guidelines for Search Tests (page 201).

To specify the test search criteria:

1. (Optional) In the Details pane of a search test, use one of the following options to select a search configuration in the Search Configuration field:

   • To test a specific search configuration, click Select Directly and choose a search configuration from the dialog box.

      In a multisite environment, you can find search configurations by site on the Browse tab.

   • To test whether a search configuration is applied for given dimension values, and if so, which one, click Select by Dimension. In the dialog that appears, select the dimension values you want to test.

      In a multisite environment, you can select only dimension values from the site you picked in the Search From list.

   • To test how a search configuration is applied based on a sample user profile, click Select by Dimension and choose a preview profile. The search engine applies the search configuration to the preview profile as it would to a real user profile with the same dimension values.

      This option appears only if an administrator has set up preview functionality.

2. (Optional) To test the results of query text typed by a user, type the text in the Search Text field.

   If your site supports multiple languages, select a language from the Search Text Language list. This selection tells the search engine which language the search text is written in. It is not the same as the language dimension value used in search configurations. For more information, see Languages in Search Tests (page 198).

   Caution: If you choose a search configuration in step 1 that uses a different language than the one you select in the Search Text Language list, any rules in the search configuration that are based on search text are not applied because the languages don't match. Only result prioritization and rules that apply to all queries are applied.

3. (Optional) To narrow the search to a category, click Select next to the Category field and choose a category from the dialog.

   In a multisite environment, you can find categories by site on the Browse tab.
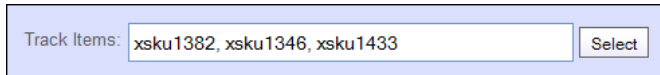
   The Category selection can affect which facet set is applied to the search results. For more information, see Testing Facets (page 206).

   Note: If you leave both the search text and the category blank, you will not receive any search results.

4. (Optional) To see how the search criteria are applied to specific catalog items, click Select next to the Track Items field and choose the items you want to track.

   In a multisite environment, you can find items by site on the Browse tab.

If you know the ID of the item you want to track, type it in the Track Items field, and use a comma to separate multiple items, as shown in the following figure. If items are indexed by product, enter a product ID, and if items are indexed by SKU, enter the SKU ID—even if the SKUs are grouped by product.

Track Items: xsku1382, xsku1346, xsku1433 [Select]

The search test ignores any extra spaces between the item IDs, either before or after the comma, but does not allow extra spaces within an item ID.

5. (Optional) To test how the search results would appear when sorted, select an option from the Sort By list.

    The options available to you depend on the behavior of your Web site. If shoppers can sort by price, for example, you can select that option to see how it impacts the search results. By default, the results list is sorted by relevance score.

6. Specify the information that you want to see in the test results. See Test Output Types (page 200).

7. (Optional) Click Save to save the test so you can edit it and run it again. For more information, see Saving and Organizing Tests (page 223).

8. Click Search to run the test.

Testing Facets

After you perform a search test, Merchandising displays any facets that apply to the search results at the bottom of the search test inputs. This allows you to verify which facets are applied, if any, and the selections that appear in each facet. You can choose a facet selection and click Search to see the impact on search results and display any nested child facets.

If you select the facet details output, you can also see the names of the source facets, the complete list of facets and their selections, and, if you did not select a category in the test inputs, how the search engine determined which category to use when applying facets. For more information, see Facet Details (page 220).

Testing Deployed Facets

You test deployed facets to troubleshoot how facets and facet selections appear on a commerce site.

Note: If you recently deployed changes to facets, the search index must be updated before you can test the newly deployed changes. For more information, see the *Working with Indexes* chapter in the *ATG Search Administration Guide*.

To test deployed facets:

1. Create a search test or edit an existing test. See Creating a Search Test (page 204).

2. Specify the search criteria you want to test and click Search. For instructions, see Specifying the Search Criteria to Test (page 205).

3. Locate the facets that appear at the bottom of the search test inputs.

4. Click a facet value or range and click Search.

5. To apply another facet selection, repeat step 4.

6. To clear a facet selection, clear the check box next to the selected facet and click Search.

7. (Optional) To save the test, including your facet selections, click Save. The next time you open and run the test, your facet selections are applied automatically.

Testing Undeployed Facets

If you are adding or editing facets in your project, you can test how those facets will appear without having to deploy the project. The search test accomplishes this by sending a temporary facet set to the search engine, where they are then applied to the search results.

Facets can be specific to a category, so the search test must know which category to use when sending undeployed facets to the search engine. There are two ways to specify the appropriate category:

• Select the category directly using the Category field in the test inputs.

• Run the test once to generate a list of search results and determine the most specific common category (use this option for text-only searches with no category selection).

If you choose the second option, you run the search test once to generate a preliminary results list that Merchandising uses to select the most specific category that contains all of the results. You then click a link in the facet details output to run the search again and apply the undeployed facet changes from your project.

To test undeployed facets:

1. Create a search test or open an existing test in the project where you created the undeployed facets. See Creating a Search Test (page 204).

2. When you create your search test, select the Test undeployed search configurations and facets from the current project checkbox. This option appears only if you are working in a project.

3. Select the search criteria you want to test. See Specifying the Search Criteria to Test (page 205).

4. If your search test includes a category, click Search.

   The search test uses this category to determine which facets – deployed and undeployed – to apply.

5. If you did not select a category in the Category field, do the following:

   • Select the Facet Details output type.

   • Click Search to run the test once.

     The search engine generates the list of search results, calculates the most specific common category for the items in the results, and applies the deployed facet set for that category. The deployed facets appear at the bottom of the search test inputs. They do not include the undeployed changes from your project.

   • In the test output, locate the Facets section and click View with facet changes from current project. This runs the search test again and applies your facet changes based on the category determined from the search results.

6. To test facet selections, locate the facets that appear at the bottom of the search test inputs, click a facet value or range, and then click Search.

   The test results are updated to reflect your facet selection. If the facet has child facets, the nested facet selections appear.

7. To apply another facet selection, repeat step 6.

8. To clear a facet selection, clear the box next to the facet value and click Search.

9. (Optional) To save the test, including your facet selections, click Save. The next time you open and run the test, your facet selections are applied automatically.

Evaluating Test Results

After you run a search test, the search test output appears at the bottom of the Details pane. Use the information in the search test output to evaluate the effectiveness of a search and determine whether you need to edit search configurations and facets or modify the information in the search index.

You control what information appears in the test results when you choose the output types to include in the test. See Test Output Types (page 200).

The following sections contain information to help you analyze each type of test output:

Results List

You use the results list to verify that the list of search results and their order matches your expectations.

This section contains the following topics:

Content Item Rankings

The search engine assigns a score to each item in the results list that indicates how closely the item matches the search criteria. This score is used to rank the results list when the list is sorted by relevance. An item's score is shown as a value between zero and 100. Higher scores indicate a closer match.

Note: If you use the Sort By input to sort the list using a criterion other than score, such as price, then the score does not determine the position of the item in the results list.

If you are testing a search configuration that includes result prioritization, choose the Ranking Calculations option to see details showing how the search engine processed the rules. Result prioritizations alter the ranking scores of content items based on the property weightings you assign. The ranking scores in the results list can help you refine your search configuration to obtain the desired results. See .

1 - 5 of 5 Results						
#	Name				ID	Final Score
1	Silk Dress				xprod1065	89.7
	Property	Property Value	Relative Prop Wtg x	Property Value Strength =		Score
	On sale	false	20.0%	50.0 (Rank 2 of 2)		10.0
	Stock Availability Status	In Stock	5.0%	100.0 (Rank 1 of 6)		5.0
	Search Term Relevance	99.0	30.0%	99.0		29.7
	Search Term Property Match	100.0	45.0%	100.0		45.0
				Calculated Score:		**89.7**
2	Elegant tuxedo dress				xprod1062	89.7
	Property	Property Value	Relative Prop Wtg x	Property Value Strength =		Score
	On sale	false	20.0%	50.0 (Rank 2 of 2)		10.0
	Stock Availability Status	In Stock	5.0%	100.0 (Rank 1 of 6)		5.0
	Search Term Relevance	99.0	30.0%	99.0		29.7
	Search Term Property Match	100.0	45.0%	100.0		45.0
				Calculated Score:		**89.7**

Links to Content Item Properties

You can click the name of a content item in the results list to see the item's indexed properties and their values. After you click the link, a popup appears showing the indexed properties divided into two sections: *metadata* properties and *text-searchable* properties. An indexed property can be either or both.

- Metadata properties have values that can be used in search configurations and facets, such as `price`, but the search engine does not consider the property values when searching for text.

- Text-searchable properties can be used to match the content item to search text, and usually include properties such as `name` and `description`.

Content item property values can help you troubleshoot why an item is or isn't returned in search results. For example, if you search for `luxury` and your search results include a bargain item, check the text-searchable properties of the item to see if the word "luxury" appears.

In some cases, a property might appear more than once in the Content Item dialog with different values, as shown in the following figure for the `longdescription`, `childskus.$repositoryid`, and `childskus.size` properties.

Properties might appear more than once in the Content Item dialog for the following reasons:

- The search engine has divided a text-searchable property with a large amount of text into smaller statements, as is the case with the `longdescription` property in the example above.

- The search engine has identified multiple values for the same property, for example child SKUs with different repository IDs and sizes, as shown in the example above. This happens if you index by product, and can occur with both metadata properties and text-searchable properties.

The Content Item dialog always displays properties at the product level, even if you index by SKU. If you index by SKU, the properties of the parent product appear only once because a SKU has one value for each property, such as color and size. There might, however be multiple instances of a large text-searchable property that the search engine has divided into smaller statements, even if you index by SKU.

Results Paging

The results list is divided into pages that match the paging on your commerce site. Use the paging controls that appear above and below the results list in the test output to navigate through the pages of results.

You can use the results paging to determine on which page an item appears when it is returned by a given set of criteria. If an item is appearing on a later page than you would like, you can create or edit a search configuration rule to move the item higher in the search results. See .

Positioning and Exclusion Rules in the Results List

The results list uses icons to indicate items that are affected by positioning and exclusion rules, as shown in the following figure.

If an item is moved to the top of the results list by a positioning rule from a search configuration, a green arrow appears next to the item's score. Excluded items do not appear in the results when you first run a test, but you can choose to display them once you have a list of results. An excluded item appears in the list with its name crossed out and a red strike out symbol next to it.

To see excluded results, click Show excluded results at the top of the results list. To remove excluded items from the list, click Hide excluded results.

Tracked Items in the Results List

When you track items in a search test, a green icon appears next to each tracked item in the results list. This allows you to quickly scan the list and determine whether any of your tracked items are included on the current page of results.

The following figure shows an example of how tracked items appear in the results list if you index by SKU and group by product:

Search Configuration Details

Use the Search Configuration Details output type to view whether a search configuration is applied to a search, and if so, which one and why.

When you test a search configuration, you have two options:

- Select the search configuration directly

- Select the dimension values or a preview profile and allow ATG Search to choose the search configuration as it would for a site user with those characteristics

The following sections describe what information is displayed in the search configuration details output for each option.

Output for a Search Configuration Selected Directly

If you select a search configuration directly in the search test inputs, the search configuration details output shows you the configuration you selected and the dimension values associated with it.

Click the name of the search configuration to open it for editing in the Details pane. After you make any edits and save your changes, return to Search Testing by clicking Test Search or by selecting a search test from the Navigation pane.

Output for a Search Configuration Selected by Dimensions

If you choose the search configuration based on dimension values, the search configuration details output shows you the dimensions you selected and how Merchandising navigates the search configuration tree to determine which configuration to apply, if any. If you choose a preview profile as a source for the dimensions, the name of the profile is also displayed.

The Search Configuration Processing table shows the path taken through the search configuration tree and whether the dimension of each folder or configuration matched a dimension from the search test, as shown in the figure above. Use this information to test the structure of your search configuration tree. For more information, see *Structuring the Search Configuration Tree* in the *ATG Merchandising Administration Guide*.

If a search configuration matches your selected dimensions, it appears in the Search Configurations Used field. Click the name of the configuration to open it in the Details pane. You can return to Search Testing by clicking Test Search or by selecting a search test from the Navigation pane.

Term Details

Use the term details output type to see how ATG Search processes search text. For each term you enter in the Search Text input, the term details output displays the following:

- Search Terms (page 214)

- Spelling Suggestions or Corrections (page 214)

- Search Term Operators (page 214), such as quotation marks

- Words Searched (page 215)

- Language Dictionary (page 215)

See the following figure for an example. The sections that follow describe each column in the term details output table.

Search Terms

The Search terms column shows each term that is processed in the search. Search text can include one or more search terms, for example, the search text `black dress` contains the search terms `black` and `dress`. In some instances, two or more words can be considered as a single term, such as `New York`.

You can use the list of search terms to determine whether you need to add or edit terms in the search dictionary. ATG Search allows administrators to add compound terms and words specific to your company—such as product names or proprietary features—and edit thesaurus entries. For more information, see the *ATG Search Administration Guide*.

Note: Although the search engine breaks search text into individual terms to locate matching items, it also considers other factors when retrieving results and calculating their relevance, such as the frequency and proximity of terms within a content item. For more information, see the *ATG Search Query Guide*.

Spelling Suggestions or Corrections

The Spelling Suggestions column lists any alternative spellings that the search engine suggests to a user. If spelling corrections are enabled on your site, this column is named Spelling Autocorrections and shows any spell-corrected terms that are included in the search.

You can use this information to test whether the search engine will return an item if a site user searches for it using a common misspelling, for example, the user searches for `cashmir` instead of `cashmere`.

Search Term Operators

The Operators column lists any operators that were applied to the search, such as quotation marks, which force a literal interpretation of a term or phrase, for example, `"green tea"`. If your site supports search term operators, you can use this information to test advanced searches on your site.

Other possible operators include:

- wildcard terms, which include an asterisk to represent missing characters, such as `suit*` to search for suit, suite, or suitcase

- required terms, which are prefaced with a plus sign, such as `+silk`

- excluded terms, which are prefaced with a exclamation point, such as `!wool`

- case-sensitive terms, which are enclosed in single quotation marks, such as `'iPod'`

For more information about operators, see the *ATG Search Query Guide*.

Words Searched

The Search for forms of column lists the exact terms, synonyms, normalized terms, morphological variations, or spelling corrections that are included in the search. Morphological variations can be word stems, such as `shoe` when the search term is `shoes`, or word expansions, such as `jump` if the search term is `hop`.

The information in this column can help you understand why certain items appear in the results list even though the items do not contain the exact term you entered in the Search Text input. This can also help you identify what items will be returned when a site user searches for a variation of a product name, feature, or other text parameter.

To modify the words that are searched for a given term, talk to your administrator. For more information, see the *ATG Search Administration Guide*.

Language Dictionary

The Dictionary column shows the language dictionary and any language adapters that the system uses to analyze the term. For example, "English: healthcare" indicates that an English language dictionary was used with an adapter appropriate for healthcare. When synonyms for a term are found using the default dictionary without an adapter, "*language*: default" appears in the Dictionary column.

If your search index includes multiple languages, the Dictionary column tells you which language dictionary the search engine used to process the search text.

If you want to add or edit terms, consider creating a custom dictionary in ATG Search. If the search engine searches for synonyms or other morphological variations that you think are inappropriate for your industry, contact your administrator to discuss applying or removing a language adapter. For more information, see the *ATG Search Administration Guide*.

Query Rule Details

You use the query rule details output type to test how the search engine applies the redirection, exclusion, and positioning rules defined in a search configuration. This output also displays the results of any custom rules defined in Search Administration. When you create a test, the query rule details output is selected by default.

A query rule appears in the query rule details output only if it was triggered by the search test. A search configuration might contain additional rules that do not appear here because they were not triggered by the current search.

Redirection Rules Triggered

This section appears if a redirection rule is triggered by your test. It shows the definition of the rule and the target URL where users are redirected when they perform this search. If the search criteria match the

requirements for more than one redirection rule, the one that is actually applied is highlighted and appears first in the list.
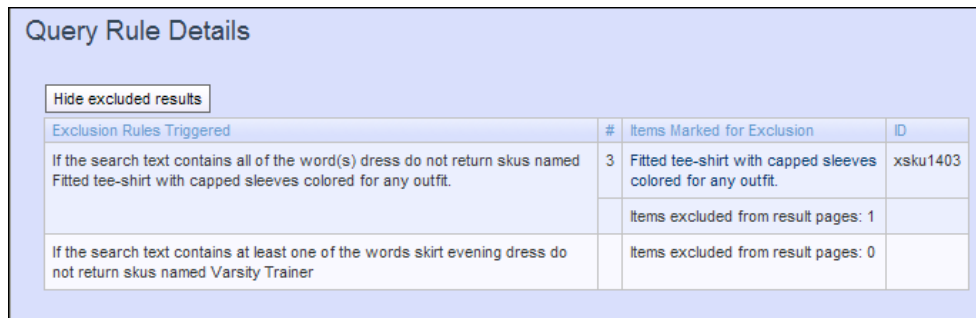
If a search triggers a redirection rule, site users do not see the search results page, they see the page at the target URL. The test output still includes the results list, though, so you can review the outcome of the search and decide if you want to keep the redirection rule.

Exclusion Rules Triggered

This section appears when the search test triggers one or more exclusion rules. It shows the definition of each activated exclusion rule in the order that it is applied.

If you want to view the excluded items, click Show excluded results. When you click the button, the following updates are made to the test output:

• Excluded items appear in the results list with a strike through the item's name. For an example, see Positioning and Exclusion Rules in the Results List (page 210).

• The table of triggered exclusion rules is updated to show each excluded content item in the current page of results along with its position number and item ID, as shown in the figure below.

You can look at where the excluded item would have appeared in the results list to analyze whether the rule is useful and has the intended effect. If an excluded item is not on the current page of results, look at the number of items excluded to determine if it might appear on other pages.

All triggered exclusion rules are listed in the query rule details output, even if the excluded items are not returned by the search. In this case, when you click Show excluded results, the rule appears in the list, but no item IDs appear next to it, and the number of items excluded is zero. You can use this information to determine whether the exclusion rule is necessary.

To remove the excluded items from view, click Hide excluded results. The excluded content items no longer appear in the output.

Positioning Rules Triggered

This section appears if items have been moved to the top of the results list because the search test triggered one or more positioning rules. It shows the definition of each positioning rule applied to the search results along with a list of the items repositioned because of the rule. You can click an item to view its properties.

If you want to view the results as they would appear without the positioning rules, click Show results without Positioning Rules. To apply the rules, click Show results with Positioning Rules.

When a search triggers multiple positioning rules, the test output shows the rules in reverse order of application, from last applied to first applied, the same way they appear in the search configuration. The rule that is applied

last and has the most effect appears first in the list. The rule that is applied first and has the least effect is shown last in the list.

To change the order of the repositioned items at the top of the search results, edit the search configuration to change the order in which the rules are applied. See Specifying the Order of the Rules (page 180).

If more than one positioning rule affects the same item, only the last rule applied appears in the test output. Other positioning rules applied to that item do not appear because they have been overridden. If you want to edit which rule has the final impact on the item, you can remove the overriding rule or change the order in which the rules are applied.

Positioning rules inherited from a base search configuration are applied before rules in the standard search configuration, and therefore have less importance. If you want a positioning rule from a base search configuration to have higher importance, move it from the base search configuration to the standard search configuration, or remove the rules from the standard search configuration.

Other Query Rules Triggered

This section lists any rules created in Search Administration that are triggered by the search test. For each triggered rule, the output table shows the pattern used to trigger the rule, the actions taken, the rule group name, and the rule name. Rules are shown in the order that they are applied. For more information, see the *Query Rules* chapter of the *ATG Search Administration Guide*.

Note: A query rule that you create in Search Administration must be deployed and indexed on the target Search Testing environment in order to appear in test results.

Tracked Item Details

The tracked item details output displays information about how content items are processed during a search. It contains two parts: the Search Processing Summary (page 217) and the Tracked Items List (page 219).

Search Processing Summary

The search processing summary shows an overview of each stage of search processing, the number of items that remained after each stage, and whether any tracked items are impacted.

Note: This section appears when you choose the tracked item details output, regardless of whether you entered any item IDs in the Track Items input.

If you entered items in the Track Items input, the search processing summary shows you whether any of the tracked items was excluded at each stage and why. If the final result set includes the tracked item, the summary shows you whether it is on the first page. You can click an item ID to navigate to the item in the Tracked Items List (page 219), where you can see detailed processing information for that item. A dash appears in the outcome for the stage if none of the tracked items was impacted, as shown in the following figure.

Tracked Item Details

Search Processing Summary

Stage	Items Remaining	Grouped Results	Tracked Item Outcomes
Access Search Index Include all items in the search index.	906		--
Check Item Candidates Select the items that include at least one search term.	64		Contains no search terms : ⊘ xsku1346
Apply Item Constraints Discard items based on category constraints, facets, and exclusion rules.	64		--
Evaluate Matching Terms Apply any operators in the search text that require or exclude terms and evaluate synonyms and other morphological variations. Eliminate items beyond the maximum retrieval limit.	64		--
Evaluate Statements Check the usage and frequency of the search text in items, and then reorder the results list accordingly.	64		--
Determine Item Scores Calculate a score for each item, using the search text and search configuration rules, and then remove items below the minimum required score.	64		--
Collect Results Organize the remaining results.	64		--
Group Items into Results	64	→ 5	Grouped by property : ▢ xsku1382 ▢ xsku1433
Assemble First Page of Results Determine the items in the first page of the results list.		5	Included on the first page : ▢ xsku1382 ▢ xsku1433

Tracked Items

#		Name	ID	Outcome	Sub-Item Score
2	▢	Elegant ~~~~~~~~	xsku1382	Included on the first page	99.2

The following table describes the stages of search processing.

Stage	Description
Access Search Index	The search engine considers items in the search index and identifies any tracked items that are not in the index.
Check Item Candidates	The search engine retrieves items that contain at least one term in the search text. Items excluded at this stage do not contain any matching terms.
Apply Item Constraints	Retrieved items that do not meet item-level constraints, such as a category constraint, are discarded. Item-level constraints also include facet constraints and search configuration exclusion rules. Items excluded at this stage do not meet item constraints, such as exclusion rules or facet selections.

Stage	Description
Evaluate Matching Terms	The search engine applies Boolean search term operators, such as operators that require or exclude terms, and considers synonyms and other morphological variations. It then ranks the search results and discards any items beyond the maximum number of result items allowed. Items excluded at this stage do not meet the requirements of Boolean operators, or are not initially ranked high enough to be evaluated further.
Evaluate Statements	After selecting the top matching results, the search engine compares the search terms to statements in the properties of the retrieved items and applies any statement-level constraints. Statement constraints include quotation marks around multiple search terms. Items are excluded at this stage if the item's statements do not meet the term requirements or the statement constraints. For more information about statements and statement constraints, see the *ATG Search Query Guide*.
Determine Item Scores	The search engine calculates the relevance of each retrieved item, first by text relevance and then by applying search configuration result prioritization and positioning rules. It then applies any other limits or thresholds, such as the minimum relevancy threshold, which requires items to meet a minimum score to be included in results. Items excluded at this stage do not meet minimum score requirements. **Note:** If the test includes a category selection but no search text and there are no search configuration rules applied to the results, then N/A appears in this column because there is nothing to calculate (no text relevance and no result prioritization and positioning rules).
Collect Results	The final results are collected and sorted.
Group Items into Results	If your site groups SKUs by product, results are grouped and the number of grouped result items is shown in the Grouped Results column.
Assemble First Page of Results	The search determines the items to display on the first page of results.

Tracked Items List

The tracked items list shows you whether a tracked item appears in the search results and if so, where it appears and why. For an item to be included in this list, you must add it to the Track Items field in the test inputs. For instructions, see Specifying the Search Criteria to Test (page 205).

Note: The tracked items list appears any time you enter items in the Track Items field. You do not need to choose the tracked item details output. If you do not select the tracked item details output, however, the output does not include the search processing summary and the tracked items list does not include detailed processing information for each item.

For each item you choose to track, the tracked items list shows you the name of the item, its item ID, the outcome of the item during search processing, and the final relevance score. You can view the properties of a tracked item by clicking the item's name. See Links to Content Item Properties (page 209).

When an item is not in the search index, the word "Unknown" appears in the Name column of the tracked items list. Check the item ID to make sure you typed it correctly in the search criteria. If "Unknown" appears for an item that you expected to be in the search index, make sure the item is deployed to the target environment and ask your administrator to update the search index.

If you choose the tracked item details output, the list also shows how the items are processed through the stages of the search and why the item is included or excluded from the results, as shown in the following figure.

Facet Details

Use the facet details output type to view how a facet set is selected for the search results, why a facet is or isn't appearing, and what facet selections are available for each facet. If the test doesn't include a category selection, you can see how the search determines which category to use for the facet set. You can also use the facet details output to test undeployed facets from your project. See Testing Undeployed Facets (page 207).

The facet details output displays the following information:

- Facet Sources (page 221) – the source of each facet and its inheritance settings

- Facet Selections (page 221) – the values or ranges in each facet, including nested facets

- Category Determination for Text-Only Searches (page 223) – the process used to determine which category to use for facet selection when no category is selected

Facet Sources

The table at the top of the facet details output shows you how ATG Search chooses which facets to apply to the search results. Each possible facet source—global, catalog, category, or parent facet—is listed along with its inheritance settings. The facets from each source are shown in the last column of the table. If the facet is not applied due to inheritance restrictions or because it is disabled, the facet is crossed out. In some cases a source is listed even though it has no facets of its own. This is because the source is part of the inheritance tree.

When you read this table, remember that a facet can be crossed out because it is not inherited by another facet source. For example, a catalog facet might allow all inheritance options, but be crossed out because a child category does not inherit catalog facets, as illustrated in the following figure. Read the table from top to bottom and consider the structure of your catalog when you analyze why a facet was or wasn't included in the final facet set.

Facet Source	Facet Inheritance Options	Facets
Global	--	Color , Size , Price
Master Catalog	All	~~On sale~~
Commerce Root	All	
Shoes	Disabled: Parent Categories , Parent Catalogs	Brand
Brand	--	Features

Facet Selections

The facet details output includes a table that shows details about each facet in the facet set. It displays:

- The name of the facet

- The property that the facet is based on

- The individual ranges or selections taken from the current search results

- The number of result items that are in each facet selection

- Status messages related to the facet, if any

To apply a facet selection to the current test results, click a range or value in the Range or Value column.

If you created your search test from within a project, a message appears at the bottom of the table stating whether the table includes undeployed facets from the current project. If it does not include facet changes, you can repeat the test with the undeployed facets by clicking the View with Facet changes from the current project link. For more information, see Testing Undeployed Facets (page 207).

Facet	Property	Range or Value	Results	Status
~~Feature~~	Product -> Product features -> displayName	Cotton	12 (ALL)	Ignored because this facet was previously selected as an input.
Price	price	70.0 - 100.0	6	
		100.0 - 130.0	6	
Size	size	10	2	
		12	2	
		2	2	
		4	2	
		6	2	
		8	2	
Color	color	Nectar	6	
		Violet	6	

⚠ These results do not include changes to facets in your project.
View with Facet changes from current project
This action will repeat the last search, plus use the undeployed facet changes, if any, from the undeployed active project.

If a facet is not applied, the name of the facet appears with a strikethrough and the Status column displays a message explaining why the facet is excluded. The following table describes messages that might appear in the Status column.

Status Message	Description
Single range or value. Facet ignored.	The facet does not appear in the facet set because all search results fall within a single range or value.
Ignored because this facet was previously selected as an input.	The search results are currently filtered by a selection from this facet. Since a value or range from this facet has already been selected, it no longer appears as an input option.
Ignored because the number of facets returned from this search exceeds the maximum.	The facet is excluded because it exceeds the maximum number of facets allowed by your site settings. This limit is controlled by the `refineMax` attribute. For information, see the *ATG Search Query Guide*.
Error: Property not found in the search index.	The property that this facet is based on is not included in the search index. For more information, see the *ATG Search Administration Guide*.

Category Determination for Text-Only Searches

The Determination of Category table shows how ATG Search determined which category to use as the basis for the facet set when the search test does not include a category selection. The search engine determines which category to use by finding the most specific category that contains all of the search results. A check mark appears in the Category Used column of the chosen category.

When you test undeployed facets, the selected category is also used to determine which undeployed facets are sent to the search engine for testing. For more information, see Testing Undeployed Facets (page 207).

The most specific common category is determined as follows:

1. ATG Search determines which categories contain result items.

2. It then identifies any categories that contain all of the search results.

3. Those categories are arranged in order of increasing specificity, that is, how many levels down they are in the catalog structure. The search test chooses the most specific category, if possible.

4. If more than one category has the same specificity, then the search test uses the lowest category in the list.

If no single category contains all of the results, only global facets apply.

The Facet Set field at the bottom of the table displays which facet set is applied to the current test. This does not necessarily include a facet from the selected category. In some cases, the selected category has no category-level facets, in which case the facet set is inherited from higher-level sources, such as the global facet set, as shown in the following figure.

When interpreting the Determination of Category table, note that the final facet set and its category, if applicable, are shown below the table. To see how ATG Search chose the facet set for the selected category, refer to the facet sources table. See Facet Sources (page 221).

Saving and Organizing Tests

You can save search tests and organize them into folders for easy retrieval. To organize your tests, you create folders in the Search Testing tree. When you save a test, the application asks you which folder you want to

save it in. You can reorganize your tests and folders at any time by renaming them or moving them to different locations in the tree. When you move, copy, or delete a folder, any folders or tests it contains are also moved, copied, or deleted.

The Search Testing tree includes the following root-level folders by default:

• My Search Tests

• Shared Search Tests

All other tests or folders must be stored in one of these default folders, which you cannot edit or remove. As the folder names imply, tests and folders in Shared Search Tests are accessible by any Merchandising user, while tests and folders stored in My Search Tests are only accessible by the user account that created them. You can edit, rename, move, or delete a test or folder stored under Shared Search Tests even if you did not create it, but only you can view and make changes to the tests and folders under My Search Tests.

Unlike many assets in Merchandising, search tests are not versioned, which means you can work with them inside or outside of a project. Search tests are independent of any project you might be working in when you create them. For this reason, search tests and search test folders do not appear on the Project tab.

This section includes the following topics:

Saving a Search Test

You can save changes to the search tests in order to reuse them for future tests. To run a saved test, just open the test and click Search.

If you often test the impact of searches on several tracked items, for example, you can save a test that contains those item IDs in the Track Items field so you don't have to re-enter them each time. Or, you could create search tests tailored to specific segments or preview profiles and reuse them each time you modify your search configurations. You can even save facet selections. The next time you run the test, the saved facet selections are applied automatically.

Note: The Test Environment field is not saved with the search test. The availability of environment options depends on whether you are working in a project.

To save a search test:

1. Create or edit a search test. For instructions, see Performing Search Tests (page 203).

2. Click Save.

3. In the Save dialog, type a name for the test.

   Names of folders and tests do not have to be unique, even within the same parent folder.

4. Select a parent folder where you want to store the test and click OK.

   • If you do not want other users to access the test, store it under the My Search Tests folder.

• If you want other users to be able to view and run the search, store it under the Shared Search Tests folder.

Editing a Saved Search Test

To edit a saved search test:

1. Choose Search Testing from the Show menu.

   Note: You do not have to be working in a project to edit a search test.

2. In the Navigation pane, locate the search test you want to edit and click the name of the test. For instructions, see Using the Navigation Pane (page 18).

   The test opens in the Details pane. The Test Environment field shows the environment where the search test will run. This value is based on your current context, which might have changed since you last saved the test.

3. To change the Test Environment, click Select and specify an environment in the dialog, as follows:

   • Select the environment that contains the products and SKUs you want to test. The options depend on the Search Testing environments set up by the administrator.

   • Select whether you want to test undeployed search configurations and facets from the current project. This option appears only if you are working in a project.

   Caution: You cannot test undeployed changes to categories, products, SKUs, or price lists. These assets must be in the search index to be included in the test. See Search Testing Environment (page 197).

   Note: If there is only one test environment and you are not working in a project, the Select button does not appear.

4. Edit the search criteria and output options as necessary. See Specifying the Search Criteria to Test (page 205) and Test Output Types (page 200).

5. Click Search.

6. (Optional) To save your changes to the search criteria and output options, click Save.

Adding a Search Test Folder

To create a new folder:

1. In the Search Testing tree, select the location where you want to add your new folder.

   • To create a folder that is accessible only from your account, select a location in the My Search Tests folder.

   • To create a folder that is available to other Merchandising users, select a location in the Shared Search Tests folder.

2. In the toolbar, click the Create New button and choose Search Test Folder.

3. Type a name for the folder in the Name field. The name does not have to be unique, even within the same location.

4. (Optional) Type a brief description of the folder's contents in the Description field.

5. Click Create.

Managing Search Tests and Search Test Folders

After you have created and saved search tests and search test folders, you can move, copy, rename, or delete them at any time, inside or outside of a project. You can perform these tasks in both the My Search Tests and the Shared Search Tests folders. When you make changes to tests or folders stored in the Shared Search Tests folder, keep in mind that your changes might affect other Merchandising users.

Moving a Search Test or a Search Test Folder

After you save a search test or create a search test folder, you can choose to change the parent folder and move it to a new location. You might, for example, want to move tests from My Search Tests to Shared Search Tests so other users can run and edit them.

To move a search test or search test folder to a new location:

1. In the Search Testing tree, select the test or folder that you want to move. If you choose a folder, all contents of the folder will also be moved.

   The test or folder appears in the Details pane.

2. Next to the Parent Folder field, click Select.

3. In the dialog that appears, select the parent folder where you want to move the test or folder and click OK.

Copying a Search Test or a Search Test Folder

To create a new search test or new search folder by copying an existing test or folder:

1. In the Search Testing tree, click the checkbox next to each test or folder you want to copy. If you select a folder, the items it contains will also be copied.

   Note: Only the selected search tests and search tests folders are copied to the new location. The contents of a folder are not automatically copied.

2. In the toolbar, click the Duplicate button.

3. In the Select a Destination dialog, select a parent folder for the copies and click OK. The copied items can have the same parent folder as the original items.

   • To create a copy that is accessible only from your account, select a location in the My Search Tests folder.

   • To create a copy that is accessible by others users, select a location in the Shared Search Tests folder.

Renaming a Search Test or a Search Test Folder

To rename a search test or a search test folder:

1. In the Search Testing tree, click the test or folder you want to rename.

   The test or folder appears in the Details pane.

2. Type a new name in the Name field.

3. Click Save.

Deleting a Search Test or a Search Test Folder

To delete a search test or search test folder and all of its contents:

1. In the Search Testing tree, click the checkbox next to each test or folder you want to delete.

   Caution: If you select a folder, all items it contains, including nested folders and their contents, will also be deleted.

2. In the toolbar, click the Delete button.

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