Oracle® Retail
Open Commerce Platform Cloud Services

Site Manager Online Help

Release 15.0

E67937-01

May 2016

ORACLE

Oracle® Retail Open Commerce Platform Cloud Services Site Manager Online Help, Release 15.0
E67937-01

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Value-Added Reseller (VAR) Language

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Site Manager Online Help
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Welcome

Note: The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.

Welcome to the Open Commerce Platform Cloud Service Site Manager online help.

Browse through the help pages by clicking on the links above or selecting pages in the table of contents. To quickly find specific information, enter search criteria in the search box above and click the search button. You can also reference information from the index.

You will find general help information in the Getting Started section. If you are new to the Site Manager, this is the best place to learn about what you can do within the Site Manager.

You will find help on each portion of the Site Manager in the Site Manager by the Section section. If you are looking for help on a particular topic, you will be able to find it here.

If you are looking for ways to accomplish certain tasks, visit the Tutorials section. You'll find step-by-step instructions to accomplish a number of common tasks here.

Home > Getting Started

Getting Started

The Site Manager allows authorized people to add or change Web site content, update products, create and manage experiences, and more. All this can be done without incurring any incremental cost and without any concern of altering the overall presentation of the Web site. Lower maintenance costs and higher quality of content are the benefits of this approach.

This guide provides instructions on the basic use of the Site Manager: how to navigate Site Manager; what the sections are and what functionality is included in them; how to use some of the tools present in Site Manager; and how to work with the Experience Management portion of the Site Manager. Detailed information on how to work with the features in each section is contained in the online help for each section. Refer to that while working in Site Manager if you are unsure how to proceed within any area.

The Site Manager utilizes a comprehensive group of permissions that control the functionality that each user has access to. Because of this, some of the functionality presented in this document may not be available to all users and you may not have access to all of the items described here. Contact your Site Manager administrator if you feel you need access to an area that you currently do not have access to.

Articles in this section

Starting the Site Manager
Navigating the Site Manager
Special Tools
Using the Experience Manager

See also

Oracle Legal Notices
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Home > Getting Started > Starting the Site Manager

Starting the Site Manager

Starting and logging into the Site Manager is an easy task. Learn how to do that here, and get a preview of what the main page looks like.

Articles in this section

System Requirements

Logging In

Site Manager Main Page

See also

Navigating the Site Manager
Special Tools
Using the Experience Manager

System Requirements

The Site Manager will run on Windows 7 or Mac OS X 10.2.x or later. It requires a screen resolution of 1024x768 or better, and Firefox 25 or Internet Explorer 9. The Adobe Flash Player version 10.0 or higher is required with Internet Explorer, and version 10.1 or higher is required with Firefox.

It is recommended that any machine running the Site Manager have a 2 GHz processor and 2 GB of memory.

The Site Manager makes use of pop-up windows. You will need to either turn off your browser's pop-up blocker or add the Site Manager to the list of exceptions.

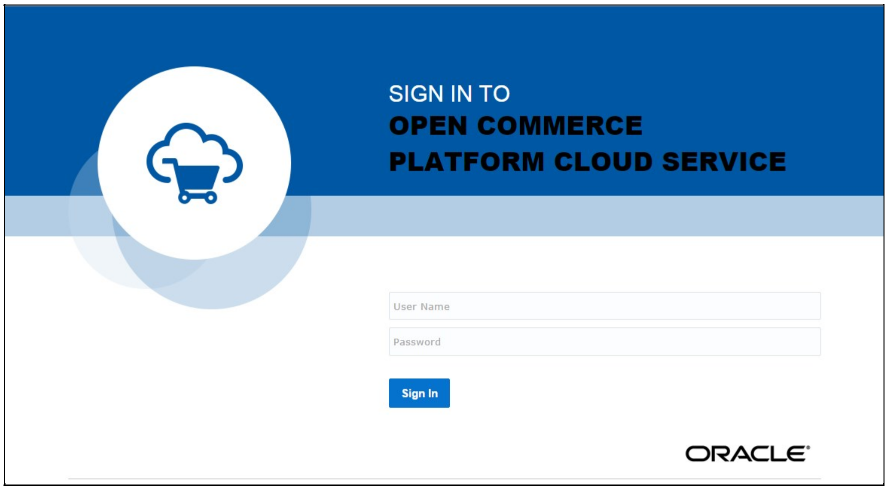
You do not need any additional software in order to use the Site Manager.

See also

Logging In
Site Manager Main Page

Logging In

To get to the Site Manager web site, go to: http://www.yourcompany.com/admin.



On the login page, enter your username and password into the appropriate fields and select the Sign In button. Your Site Manager Administrator will provide you with a username and password to access the Site Manager web site. If you do not have a username or you have difficulty logging in, please contact your Site Manager administrator.

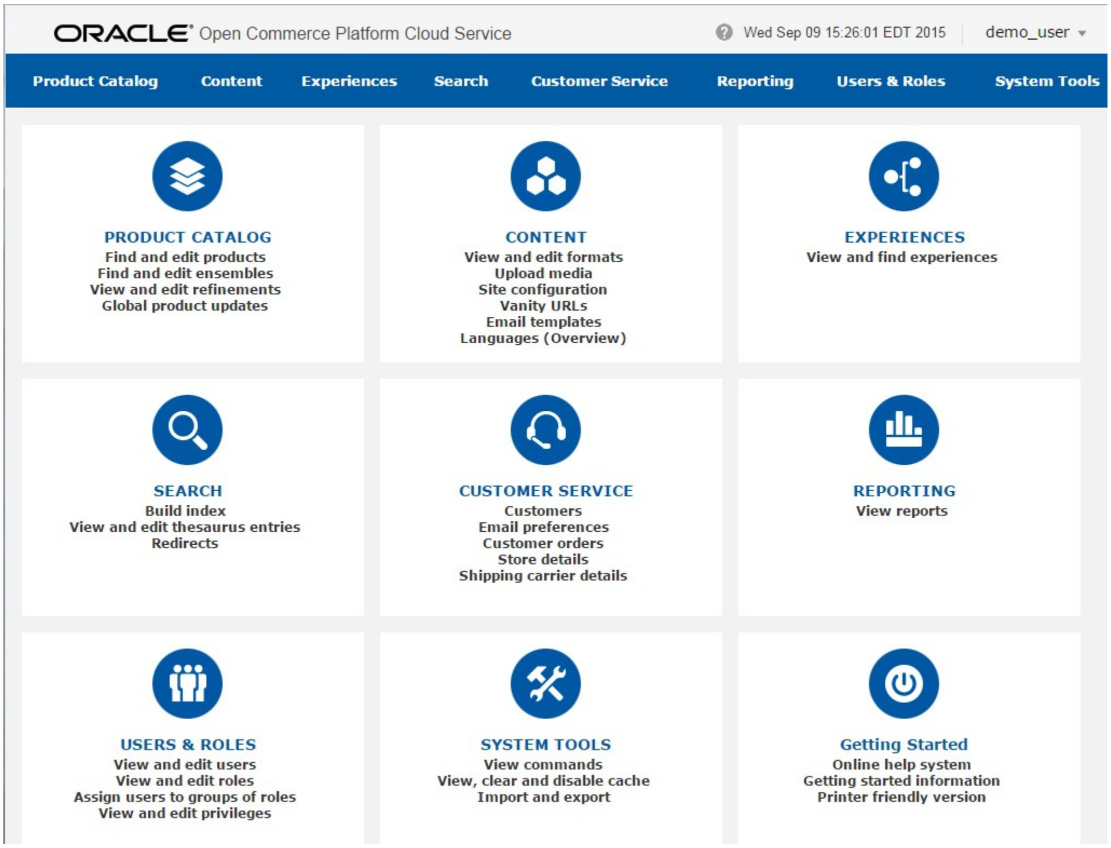
See also

System Requirements
Site Manager Main Page

Home > Getting Started > Starting the Site Manager > Site Manager Main Page

Site Manager Main Page

Once you have successfully logged in, you will be taken to theSite Manager main page. From this page you can go to specific sections of Site Manager by selecting sections from the header tab at the top of the page or going directly to a specific function using the shortcut links listed in the main body of the page.



See also

System Requirements
Logging In

Home > Getting Started > Navigating the Site Manager

Navigating the Site Manager

Moving around within the Site Manager is accomplished through various navigation links. Regardless of the section, the pages all are segmented similarily and it is easy to go from one section to another.

Articles in this section

Areas on a Page   Moving Around   Sections and Functions

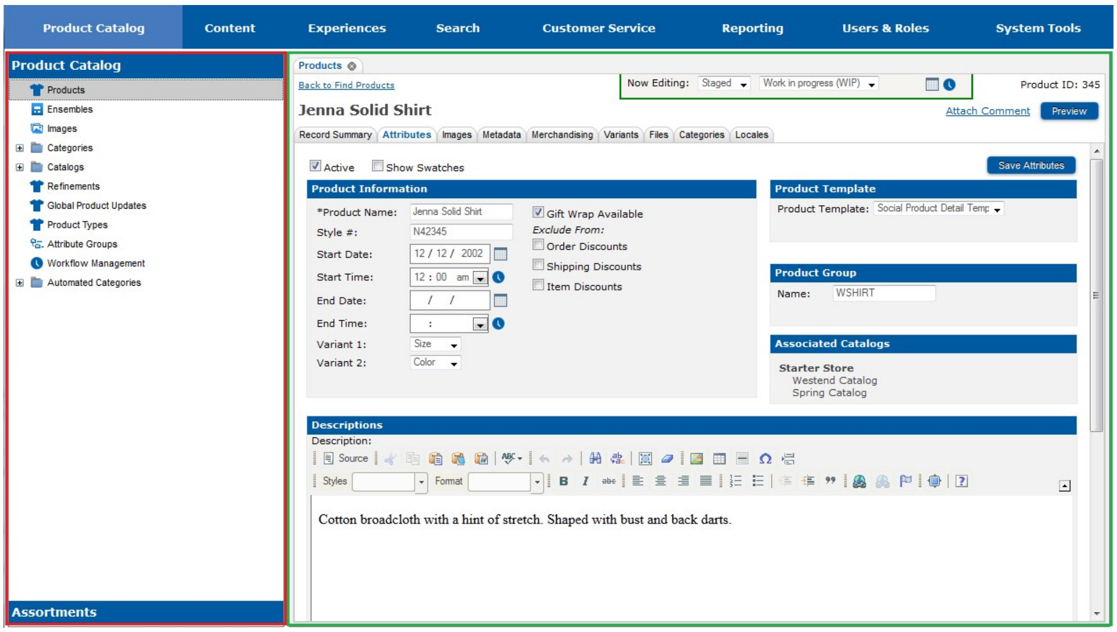
See also

Starting the Site Manager
Special Tools
Using the Experience Manager

Home > Getting Started > Navigating the Site Manager > Areas on a Page

Areas on a Page

While the Site Manager Main Page is the first page you see, you will spend most of your time working within the different sections of the Site Manager. Although the functionality differs between sections, the interface for each section is the same (except for minor differences in the Experience Management section, which are described later). When working within a section, the page will be divided into two different areas: a pane on the left side that contains different areas of functionality that can be selected; and a pane on the right side that contains the work area for what is selected in the left pane. A header tab area will be present at all times and will allow you to move between the different sections within Site Manager.



See also

[Moving Around](#)
[Sections and Functions](#)

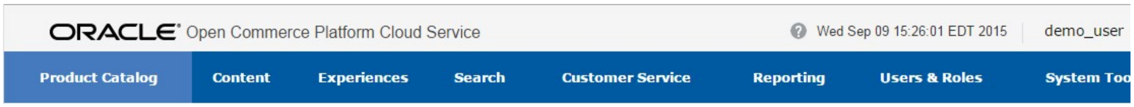
Home > Getting Started > Navigating the Site Manager > Moving Around

Moving Around

To navigate between and within sections, the Site Manager utilizes three forms of navigation: header tab navigation, left-side navigation, and breadcrumb navigation.

Header Tab Navigation

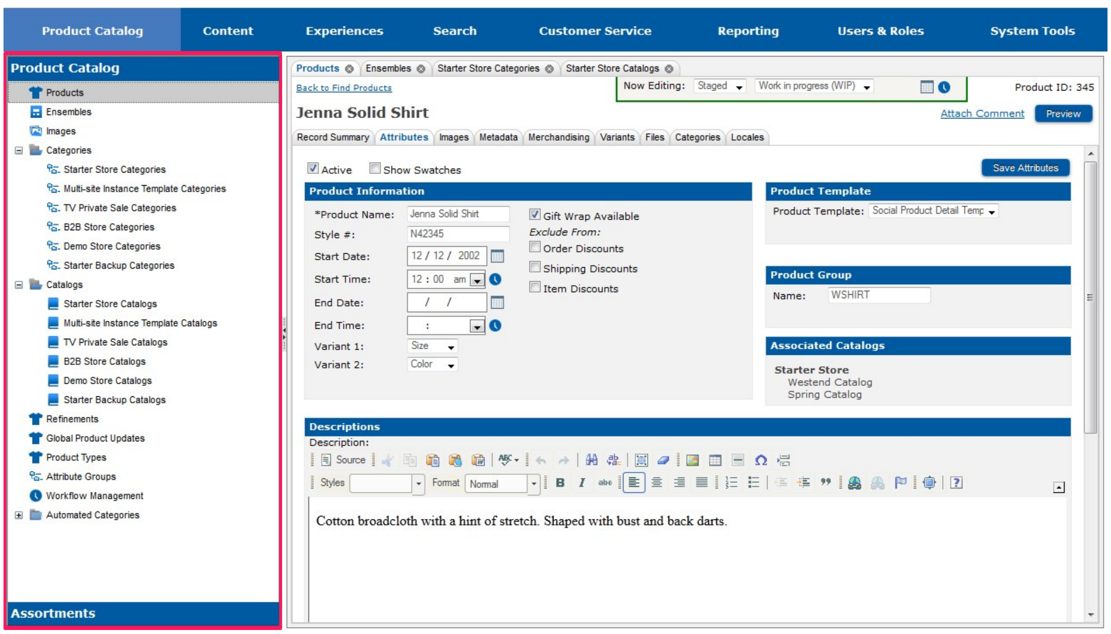
The top header navigation area contains tabs for the different sections (i.e., Users and Roles, Content, Product Catalog, Search, Customer Service, Experiences, Reporting, and System Tools) as well as the main page of Site Manager.



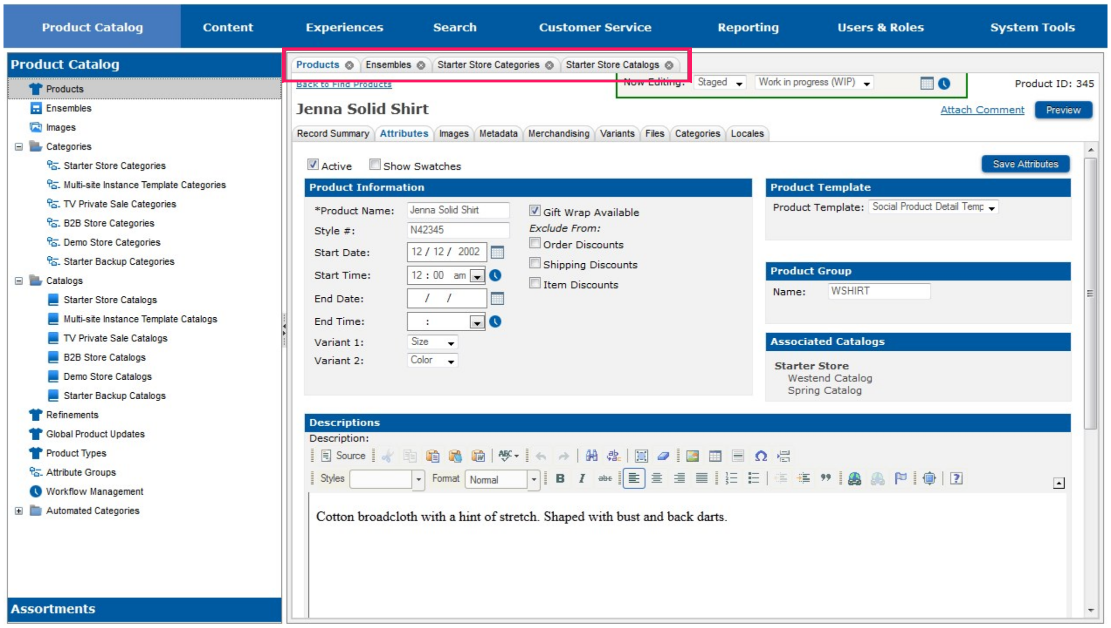
When you select one of the tabs, the page refreshes and the main body of the page is redrawn and displays the selected section's components.

Left-side Navigation

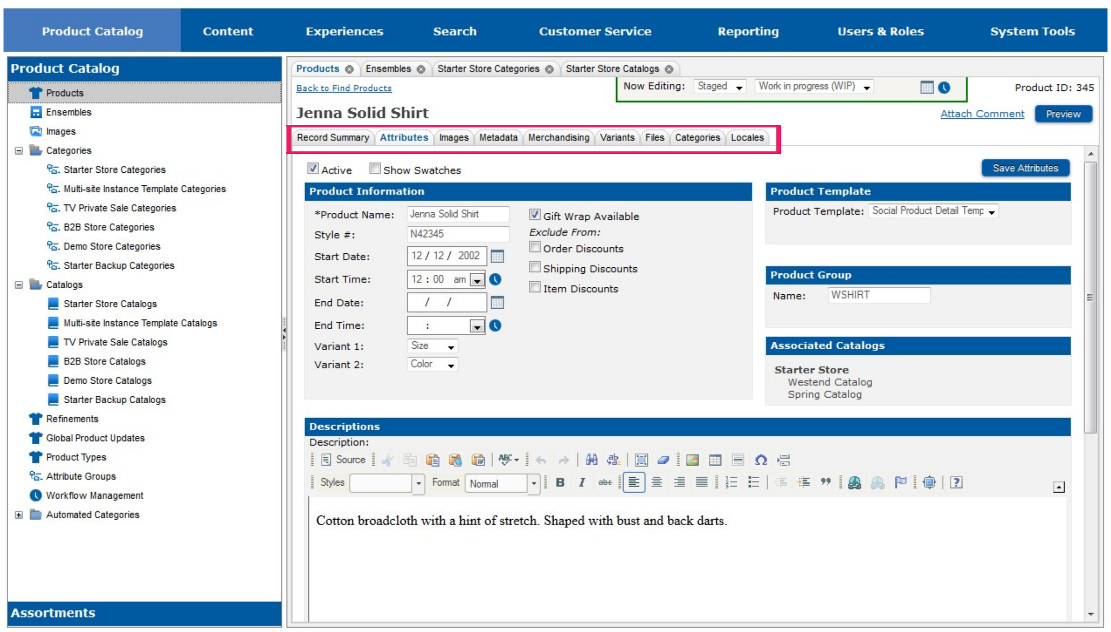
Left-side navigation is used to move between the components of each section. Selecting a component from the left-side navigation pane will cause the component's information to be displayed in the right-hand work pane.



Each component that is selected will open in it its own tabbed pane within the right-hand work pane. You may navigate between the opened components by selecting their tab header at any time. Please note, however, that for components that are already open, reselecting the component from the left-hand navigation pane will cause the component tab to be refreshed and redisplayed in its initial state. Any work in that component tab that had not been previously saved will be lost.

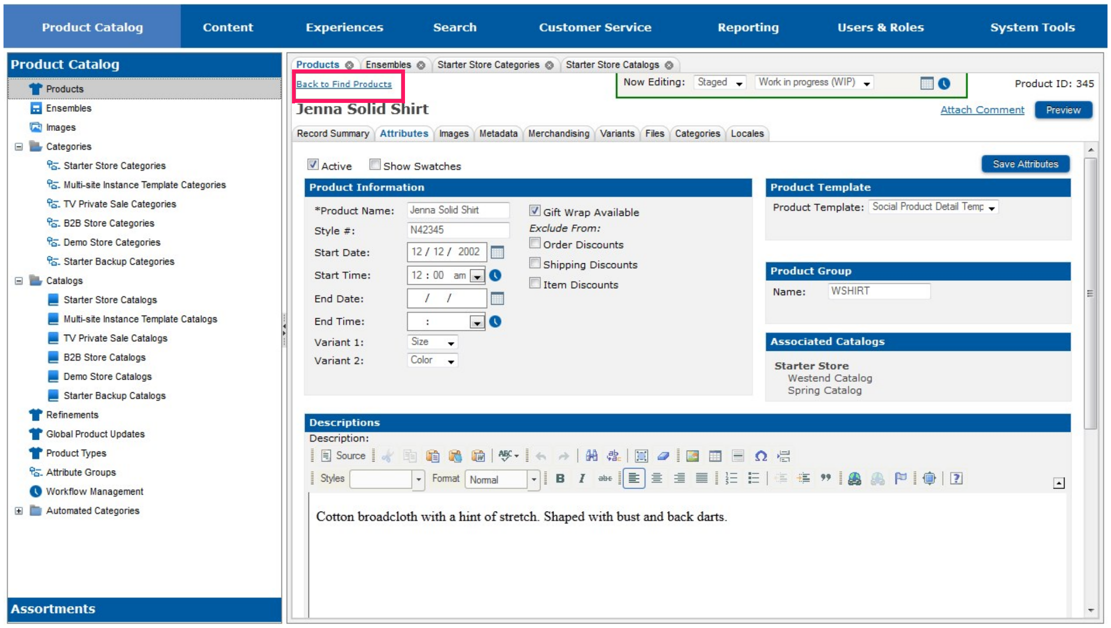


Some component tabs also contain a secondary set of tabbed panes that are used to group information and tasks into logical areas. Selecting those tabs will take you directly to that area.



Breadcrumb Navigation

Breadcrumb navigation is used within components to return you to the first page of the component. Please note that if you select a breadcrumb and have not completed your task on a page, any unIsubmitted updates will not be saved.



Using the Back Button

While the back button is a common navigational tool, you should **not** use it in the Site Manager. If you do select the back button, any un-submitted modifications will not be saved.

See also

Areas on a Page
Sections and Functions

Home > Getting Started > Navigating the Site Manager > Sections and Functions

Sections and Functions

The following table details key available functions by component within the Site Manager's seven sections: Product Catalog, Content, Experiences, Search, Customer Service, Reporting, Users and Roles, and System Tools.

Section	Component	Main Page Shortcut	Component Functions
Product Catalog	Products	Find and edit products	• Find products by name, product ID, or viewing list. • Add, edit, delete, and activate products. • Assign cross-sells to products. • Manage product variants. • Preview product and ensemble page.
	Ensembles	Find and edit ensembles	• Find ensembles by name, product ID, or viewing list. • Add, edit, delete, and activate ensembles. • Assign products to an ensemble. • Assign cross-sells to ensembles.
	Categories	N/A	• View by catalog hierarchy or alphabetically. • Search for a category. • Create, edit, delete, or activate a category. • Edit, remove, or rank sub-categories within category. • Add, edit, remove, or rank products within category.
	Catalogs	N/A	• Make catalog active. • Set default catalog. • Add, edit, or remove a catalog.
	Refinements	View and edit refinements	• Create a refinement. • Activate/deactivate a refinement. • Modify when a refinement is displayed. • Modify how a refinement is displayed.
	Global Product Updates	Global product updates	• Find products that match a specific criteria. • Update the price of all the products. • Update the start/stop date of all of the products. • Activate/deactivate all of the products. • Add the products to a product group.
	Product Types	N/A	• Create a product type. • Edit a product type. • Modify the root attribute group(s) for a product type.
	Attribute Groups	N/A	• Create attribute groups. • Edit attribute groups. • Assign product attributes to an attribute group.
	Workflow Management	N/A	• View products/ensembles by status. • Preview modified products. • Update workflow status of products/ensembles.
	Automated Categories	N/A	• View top selling products, on sale products, and new arrivals of the site. • Configure number of top selling products, on sale products, and new arrivals to display on site. • Configure date range to use to determine top selling products and new arrivals.

Section	Component	Main Page Shortcut	Component Functions
Content	Sections and Pages	N/A	• Create, edit, and delete a site section. • View, create, edit, and delete pages in section. • Update page name and description information. • Update label, path, and page area display. • Update title, keywords, and description. • Configure, edit, and delete page areas. • Update name, description, and targeted content of an area. • Assign areas to pages. • Schedule content within an area. • Assign a status to content within page area. • View content within a page area by date. • Edit or clone content. • Preview content and pages using the preview calendar.
	Site Preview	N/A	• View the site the way it looked or will look on a particular date.
	Find Content	N/A	• Find content by date and status. • View all content.
	Formats	View and edit formats	• View, edit, delete, and activate content asset type formats. • Update XSL templates for formats.
	Upload Media	Upload media	• Upload images or files. • Preview images and view details such as size and location.
	Site Configurations	Site configuration	• Create an entry for a new site. • Clone an existing site. • Modify the URLs for a site. • Modify the configuration parameters for a site. • Configure automated merchandising rules. • Configure Relate, Locate, and Loyalty integrations. • Configure social media settings.
	Vanity URLs	Vanity URLs	• Create a vanity URL. • Modify the vanity URL code or redirect URL.
	Email Templates	Email templates	• Edit and delete transactional email templates. • Create an experience manager email template. • Edit or delete experience manager email templates.
	Additional Sitemap Entries	N/A	• Add an entry to the sitemap. • Change the priority or frequency of a sitemap entry. • Remove a sitemap entry.
Experiences	All Experiences	View and find experiences	• Create personalized experiences for users including user group conditions, targeted content, awards, and email templates. • Edit, create, and delete experiences.
	User Groups	N/A	• Create User Groups based on a combination of pre-defined conditions. • Customize User Groups to fit the experience's requirements.
	Targeted Content	N/A	• Select Targeted Content to include in an experience. • Tailor the properties of each Targeted Content component to match the experience's requirements.

Section	Component	Main Page Shortcut	Component Functions
	Awards	N/A	• Select Award types to include in an experience. • Customize the award to fit the experience.
	Email templates	N/A	• Select an Email Template to include in an experience. • Modify the template's parameters, including body content, to fit the experience.
Search	Build Index	Build index	• Create and swap in a new search index.
	Thesaurus	View and edit thesaurus entries	• View, edit, create, and delete one-way and two-way thesaurus entries.
	Redirects	Redirects	• Create and edit URLS to redirect the user to when they use the specified search terms.
	XML Sitemap	N/A	• Generate the site's sitemap.
Customer Service	Customers -> Customers	Customers	• Search for members by first name, last name, or email address. • Edit member's online profile. • Add memo to member profile. • Email password to member. • View members order status.
	Customers-> Email Signup	email preferences	• Search by email address or show all email users. • Activate/de-activate email preference.
	Customers-> Registration Requests	N/A	• Available on B2B sites only. • Manage site registration requests.
	Search Orders	Customer orders	• Search for orders by start date, end date, order condition, order number, or email address.
	Business Partner Accounts	N/A	• Available on B2B sites only. • View and edit the business partner accounts. • Add new business partner accounts. • Set business partner purchasing rules. • Associate customers with the business partner.
	Stores	Store details	• Available on B2C sites only. • View and edit the stores entered for the site. • Add new stores. • Add and manage store events. • Add and manage store images. • Customize store SEO information.
	Mobile App Notifications	N/A	• Available on B2C sites only. • Add and manage the notifications for the mobile application. • Add and modify the stores associate with a notification.
	Shippping Carriers	Shipping carrier details	• Create a shipping carrier. • Maintain the fees for a shipping carrier.
	Promotions	N/A	• Available on B2C sites only. • View the promotions defined within the site.
	Gift Card/Certificate Balance	N/A	• Available on B2C sites only. • Find the balance of a gift card or gift certificate.

Section	Component	Main Page Shortcut	Component Functions
Reporting	Customers	View reports	• View customers with largest wish lists and most sales.
	Experiences	View reports	• View the performance of experiences and their branches.
	Orders	View reports	• View the amount of orders placed.
	Products	View reports	• View products not in an active category, without an active variant, without an image, and out of stock.
	Site Activity	View reports	• View the number of entries added to member address books, the number of email sign-ups, the number of new member registrations, the number of user sessions created, the number of items added to wish lists, and the number of searches with zero results.
	Site Administration	View reports	• View audit records of the activities of Site Manager users.
Users and roles	Users	View and edit users	• Create, edit, delete, and activate a user. • Assign roles to a user. • Assign user to group of roles. • View and edit group details.
	Roles	View and edit roles	• Create, edit, delete, and activate a role. • Create, edit, delete, or activate groups of roles. • View, delete, and activate privileges that make up roles.
	Role Groups	Assign users to groups of roles	• Create, edit, delete, and activate a role group. • View, add, and delete roles to a role group. • View, add, and delete users to role group.
	Privileges	View and edit privileges	• View, create, edit, and delete groups of privileges. • View, create, delete, and activate individual privileges.
System Tools	Commands	View commands	• Browse all commands that are configured and active within the command engine. • View information on commands.
	Forms	N/A	• Browse all command forms that are configured and active within the command engine.
	Pipelines	N/A	• Browse all pipeline sources that are configured and currently active.
	Job Monitor	N/A	• View status and details for all Web site jobs.
	Cache Stats	View, clear, and disable cache	• View overall statistics of the caching engine. • View statistics associated with each individual cache record.
	Profiling	N/A	• View and activate profiling statistics. • Disable and reset profiling counters.
	Asset Loaders	N/A	• Browse asset loader pools that are configured and active within Content Management engine. • View number of objects within each pool for each loader type.

Section	Component	Main Page Shortcut	Component Functions
	Import/Export	Import and Export	• Import products, product variants, and categories. • Import content. • Import store information. • Export catalog requests.
	Logging Settings	N/A	• Activate/deactivate logging options for the site.

See also

Areas on a Page
Moving Around

Home > Getting Started > Special Tools

Special Tools

Most of the tools that you will use while working within the Site Manager are tools that you have used in other applications. This section describes the Site Manager tools that are important to understand while working within the Site Manager.

Articles in this section

Working with Tables

Working with the Text Editor

Working with the Clock

Working with Image Map Assets

Working with Email Tokens

See also

Starting the Site Manager
Navigating the Site Manager
Using the Experience Manager

Working with Tables

There are many places within Site Manager where information is presented in tables.

Sorting

All columns can be sorted with the exception of action columns (which contain a button to take an action). Click a column header and you will view an upwards arrow displayed next to the header and the column will be sorted ascending to descending. Click the header again to sort descending to ascending (the arrow indicator in the header will now point downwards).

Adjusting Order

There are several instances within Experience Management where you can move items up and/or down in order to rank them. This ordering affects the items' display on the Web site.
To move an item, simply click and drag it up or down. You will view a dark black line representing where you have dragged the selection and can drop it.

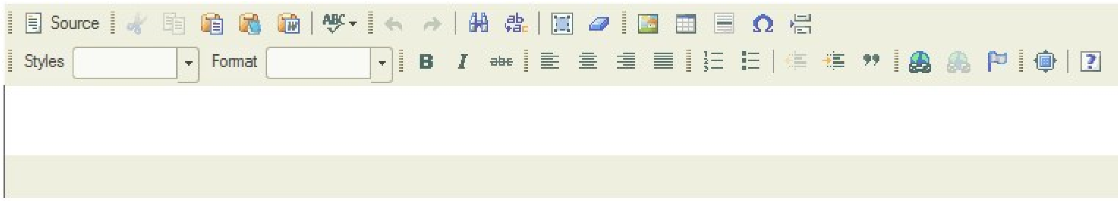
See also

Working with the Text Editor
Working with the Clock
Working with Image Map Assets
Working with Email Tokens

Home > Getting Started > Special Tools > Working with the Text Editor

Working with the Text Editor

In the Content, Product Catalog, and Experience Management sections of the Site Manager, a WYSIWYG text editor is used.



The text editor works similar to Microsoft Word, where you have various formatting and feature options presented through toolbars. A few special items that are unique to the text editor that is used are noted below.

Pasting Text In From Word

Use the "Paste from Word" option when pasting text in from Word. The regular paste option may paste in formatting from Word that can overwrite the formatting you set up in the text editor.

Inserting a Hyperlink

1. In the text editor, highlight the text you want to make a hyperlink.
2. On the WYSIWYG text editor toolbar, select the Hyperlink button.
3. In the dialog that opens, leave the link type as URL and choose the protocol type (e.g., http:, https:, etc.) from the drop down.
4. Enter the URL you would like the selected text to link to.
5. Select OK. The dialog box closes and you see the selected text highlighted and linked. Save the content and preview it to confirm the link works as you want it to. If you want this link to launch a new browser window when selected, toggle to the HTML text view and insert html before the “a href” tag as follows: "&lta target=”_blank” a href=....>". Preview to confirm the link works as you want it to.

Inserting an Image Location

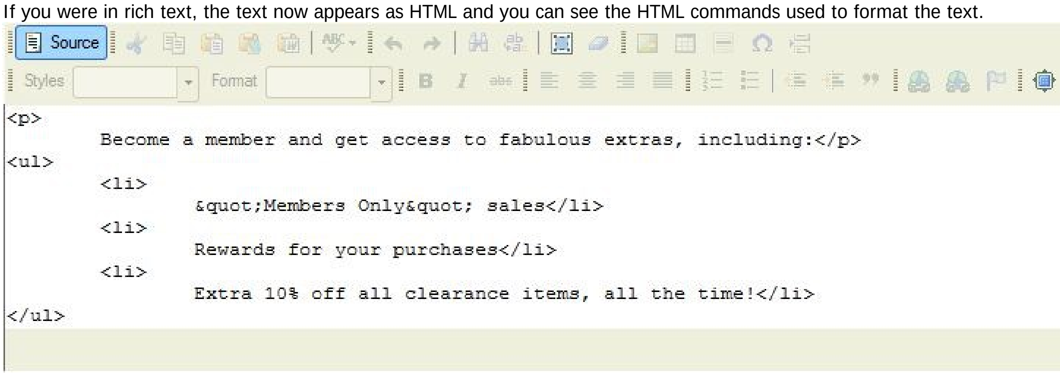
1. On the WYSIWYG Text editor toolbar, select the Image button .
2. In the dialog box that appears, enter the **full** image location on the file server (e.g., assets/images/header_nav/logo.gif) or from an external Web site (e.g. http://www.google.com/images/logo.gif). Images can be uploaded to the image server using the Upload media function of the Content section of Site Manager. You can also use Upload media to find the path URL to paste in the dialog box. Enter alternative text and you can leave the rest of the information blank.
3. Select OK. The dialog box closes and you see the selected image inserted in the WYSIWYG text editor.

Inserting a Horizontal Rule

1. On the WYSIWYG text editor toolbar, select the Horizontal Rule icon .
2. A horizontal rule will be drawn just below the position of the cursor.

Toggling between Rich Text and HTML Views

1. In the WYSIWYG text editor, select the Source icon Source .
2. If you were in rich text, the text now appears as HTML and you can see the HTML commands used to format the text.



3. You can now enter new HTML, paste HTML, or modify existing HTML.
4. To toggle back to rich text, select the Source icon Source again.

Font and Link Style Settings

Text in the text editor will appear in Arial font, but the display on the web site according to style sheets employed by the web site. Please note that only when you preview the content do you see the style sheets applied.

Although the text editor provides dropdown menus for font and size, you should avoid using them. You should instead insert the appropriate web site class styles for text and/or links via the text editor's HTML mode. If you do set the font and size in the text editor, realize you are overwriting the style for that text.

Line Breaks and Paragraph Breaks

Unlike Microsoft Word, the text editor does not wrap text within the window that you see. As a result you have to scroll over to the right, unless you enter a line break or paragraph (2 lines) break. The following table shows how you can enter a line break and paragraph break in the text editor.

Action	How You Do It
1 Line Break	**SHIFT + ENTER**
Paragraph (2 Line) Break	**ENTER**

What the Text Editor Cannot Do

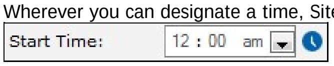
There is no way for the text editor to perform a character count or spell check. Also, you will not see your style sheets applied until you preview the selected content.

See also

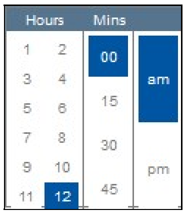
Working with Tables
Working with the Clock
Working with Image Map Assets
Working with Email Tokens

Working with the Clock

Wherever you can designate a time, Site Manager displays both a time text box and a clock button next to it.



When clicked, the clock button  opens a new pop-up layer over the existing page. This layer has a mini clock, in which you may choose hours, minutes, and AM or PM. To select the time, click the hour, minute, and AM or PM that you want to choose. The layer window will close when you click the mouse anywhere outside of the time text box.



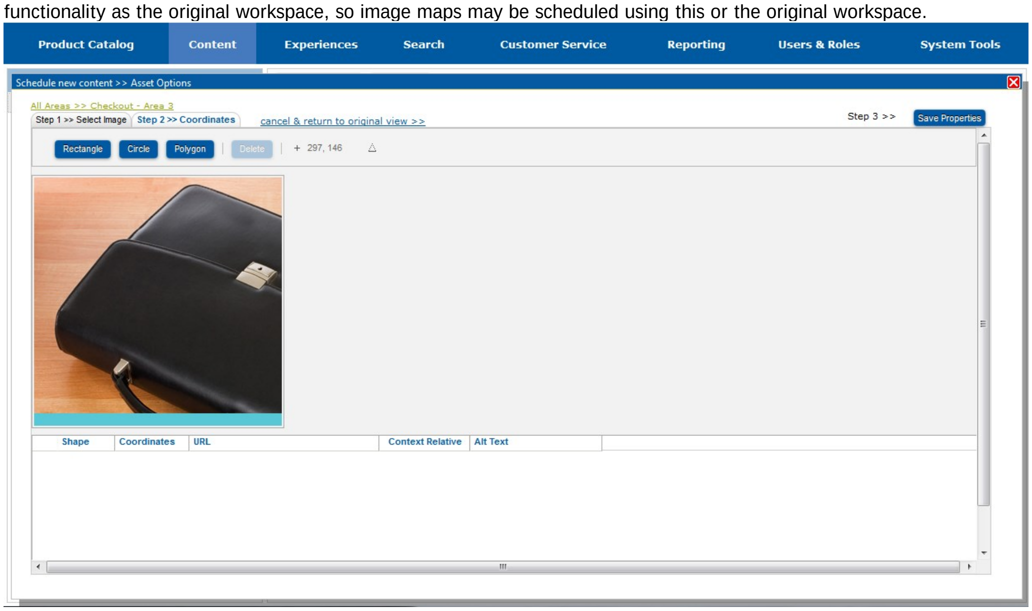
See also

[Working with Tables](#)
[Working with the Text Editor](#)
[Working with Image Map Assets](#)
[Working with Email Tokens](#)

Home > Getting Started > Special Tools > Working with Image Map Assets

Working with Image Map Assets

Image map assets are image assets that have specific areas on them that redirect the user to a new page when the areas are clicked on. The areas are defined in the Site Manager when an image map is scheduled to appear on the site. If the image is large, a larger workspace can be brought up so that the entire image may be viewed without scrolling. This larger workspace provides the same functionality as the original workspace, so image maps may be scheduled using this or the original workspace.



See also

Working with Tables
Working with the Text Editor
Working with the Clock
Working with Email Tokens

Working with Email Tokens

When working with email templates (see Email Templates for the creation of them and Email Templates for their use in Experience Management), there is a set of tokens that can be included in the email body to customize and personalize each email. When the email is sent, these tokens will be replaced dynamically with the information that they represent.

Tokens have a specific format which allows them to be identified for replacement when an email is sent. Tokens are contained within braces and preceded by a dollar sign, as in ${first_name} and ${last_name}.

Care should be taken when including tokens in an email. If a token cannot be translated at the time that the email is processed for sending, the processing will be halted and the email will not be sent. This can be prevented by providing alternatives if the token cannot be translated. The two types of alternatives are:

- Replacement - Replacement provides an alternative text to use in place of the token. If the token cannot be translated, the alternative text is included in the email in place of the token. This is done by including "#if", "#else", and "#end" in the email. For example, "Dear #if ${first_name} ${last_name} #else Valued Customer #end" will translate to "Dear John Doe" if the recipient is a registered user with a first and last name on file, or "Dear Valued Customer" if the recipient is not a registered user.
- Removal - Removal indicates that the token can safely be left out of the email if it cannot be translated. A token that can be safely left out of an email is indicated by the presence of an exclamation point between the dollar sign and the left brace. For example, "$!{cart.items.item-1.name} $!{cart.items.item-2.name} $!{cart.items.item-3.name} $!{cart.items.item-4.name}", when translated, will contain the names of the first four items in the user's cart. If the user has less than four items in their cart, then nothing will be printed for the names of the non-existent items.

There are additional commands available for performing advanced actions with tokens, such as iteratoring over groups of items. For information on those commands, refer to the following website:

http://jakarta.apache.org/velocity/docs/vtl-reference-guide.html

The following tokens are available for use in emails:

Token Name	Description	Token
First Name	The user's first name. Not available for anonymous users whose session has expired.	${first_name}
Last Name	The user's last name. Not available for anonymous users whose session has expired.	${last_name}
Full Name	The user's first and last name. Not available for anonymous users whose session has expired.	${full_name}
Email Address	The user's email address. Available for all users.	${email_address}
Sender Name	The name of the user who is initiating the sending of an email. This is entered on the website by the initiator of the email.	${sender.name}
Sender Message	A message that the user who is initiating the sending of an email wants included with the email.	${sender.message}
Recipient Name	The name of the person receiving the email. This is entered on the website by the user initiating the sending of the email.	${recipient.name}
Username	The username of the account associated with the current user.	${username}
Password	The password of the account associated with the current user.	${password}
Entity Name	The name of the product or ensemble that is currently being viewed by the user.	${entity.name}

Token Name	Description	Token
Entity Display Price	The display price of the product or ensemble that is currently being viewed by the user.	${entity.display.price}
Entity Link	A link to the product or ensemble that is currently being viewed by the user.	${entity.link}
Last Order Date	Date of last order placed. This is only applicable for members who have either a current or expired session. The display for the order date will be the same as the default for current date: MM/DD/YYYY.	${order.date}
Number of Items in Last Order	The number count of items in the user's last placed order. This information is not known for anonymous users who either do or do not have a current session.	${order.items.count}
Last Order Items	Five tokens to represent up to five items in the user's last order. The token displays as the Item-Mini Img, Name & Price content format showing the mini sized image, name, and price below it for the item in their Cart and is for HTML emails only. The item image and item name and price will be links back to the item on the Web site. This information is not known for users whose session has expired.	${order.items.item-1.image_name_price_html} ${order.items.item-2.image_name_price_html} ${order.items.item-3.image_name_price_html} ${order.items.item-4.image_name_price_html} ${order.items.item-5.image_ngifame_price_html}
Last Order Item Name and Price	These tokens are for text emails and list the item name and display price (not MSRP if exists) for up to five items in the Shopping Cart.	${order.items.item-1.name_price} ${order.items.item-2.name_price} ${order.items.item-3.name_price} ${order.items.item-4.name_price} ${order.items.item-5.name_price}
Last Order Item Name	The item name alone. This can be used for HTML or text emails.	${order.items.item-1.name} ${order.items.item-2.name} ${order.items.item-3.name} ${order.items.item-4.name} ${order.items.item-5.name}
Last Order Item Price	The item display price (no MSRP if exists). This can be used for HTML or text emails.	${order.items.item-1.price} ${order.items.item-2.price} ${order.items.item-3.price} ${order.items.item-4.price} ${order.items.item-5.price}
Last Order Item URL	This token is for text email use and lists the URL to the item page for up to five items in the user's last order. This can be used for HTML or text emails.	${order.items.item-1.link} ${order.items.item-2.link} ${order.items.item-3.link} ${order.items.item-4.link} ${order.items.item-5.link}
Last Order Item Image URL	URL for item image.	${order.items.item-1.image_src} ${order.items.item-2.image_src} ${order.items.item-3.image_src} ${order.items.item-4.image_src} ${order.items.item-5.image_src}
Last Order Item Quantity	The quantity purchased for the item in the last order.	${order.items.item_quantity}
Last Order Item Name	The name of the item purchased in the last order.	${order.items.name}

Token Name	Description	Token
Last Order Item Color Name	The name of the color of this item.	${order.items.color_name}
Last Order Item Size Name	The name of the size of this item.	${order.items.size_name}
Last Order Item Total	The purchase total of this item.	${order.items.item_total}
Last Order Item Gift Wrap	The gift wrap charge for this item.	${order.items.gift_wrap}
Last Order Item Discount	The discount amount for this item.	${order.items.item_discount}
Last Order Item Discount Quantity	The quantity of this item that a discount was applied to.	${order.items.item_discount_quantity}
Last Order Item List Price	The list price of this item.	${order.items.list_price}
Last Order Item Back Ordered Message	A back ordered message (if applicable) associated with this item.	${order.items.back_ordred_message}
Last Order Item Discount Total	The total discount applied to this item.	${order.items.item_discount_total}
Last Order Billing Address First Name	The first name associated with the billing address for the order.	${order.billing_address.FIRST_NAME}
Last Order Billing Address Last Name	The last name associated with the billing address for the order.	${order.billing_address.LAST_NAME}
Last Order Billing Address First Address Line	The first address line associated with the billing address for the order.	${order.billing_address.ADDRESS_LINE_1}
Last Order Billing Address Second Address Line	The second address line associated with the billing address for the order.	${order.billing_address.ADDRESS_LINE_2}
Last Order Billing Address City	The city associated with the billing address for the order.	${order.billing_address.CITY}
Last Order Billing Address State	The state associated with the billing address for the order.	${order.billing_address.STATE}
Last Order Billing Address Zip Code	The zip code associated with the billing address for the order.	${order.billing_address.ZIP_CODE}
Last Order Shipping Address First Name	The first name associated with the shipping address for the order.	${order.shipping_address.FIRST_NAME}
Last Order Shipping Address Last Name	The last name associated with the shipping address for the order.	${order.shipping_address.LAST_NAME}

Token Name	Description	Token
Last Order Shipping Address First Address Line	The first address line associated with the shipping address for the order.	${order.shipping_address.ADDRESS_LINE_1}
Last Order Shipping Address Second Address Line	The second address line associated with the shipping address for the order.	${order.shipping_address.ADDRESS_LINE_2}
Last Order Shipping Address City	The city associated with the shipping address for the order.	${order.shipping_address.CITY}
Last Order Shipping Address State	The state associated with the shipping address for the order.	${order.shipping_address.STATE}
Last Order Shipping Address Zip Code	The zip code associated with the shipping address for the order.	${order.shipping_address.ZIP_CODE}
Last Order Shipping Address Gift Message	The gift message (if any) entered for the shipping address for the last order.	${order.shipping_address.GIFT_MESSAGE}
Last Order Number	Order number of last order placed. Token can be made a link if user uses the link token. This is only applicable for members who have either a current or expired session.	${order.number}
Last Order Total	Grand total amount of last placed order (including tax, shipping, and any order discounts). This is only applicable for members who have either a current or expired session.	${order.grand_total}
Last Order Total of All Items	Grand total amount of all items purchased in the last placed order. This is only applicable for members who have either a current or expired session.	${order.grand_items_total}
Last Order Total of All Gift Wrap Charges	Grand total amount of all gift wrap charges in the last placed order. This is only applicable for members who have either a current or expired session.	${order.grand_gift_wrap_total}
Last Order Total of All Shipping Charges	Grand total amount of all shipping charges for the last order. This is only applicable for members who have either a current or expired session.	${order.grand_shipping}
Last Order Total Charged to Credit Card	Total amount charged to the user's credit card for the last order.	${order.cc_total}
Last Order Shipping Total Per Shipping Address	Shipping total for a shipping address for the last order.	${order.order_shipping}
Last Order Tax Total Per Shipping Address	Tax total for a shipping address for the last order.	${order.order_tax}

Token Name	Description	Token
Last Order Gift Wrap Total Per Shipping Address	Gift wrap total for a shipping address for the last order.	${order.order_gift_wrap_total}
Last Order Item Total Per Shipping Address	Item total for a shipping address for the last order.	${order.order_items_total}
Number of Items in Current Cart	The number count of items in the user's current Shopping Cart. This information is not known for users whose session has expired.	${cart.items.count}
Items in Cart Info (Item and Name format)	Five tokens to represent up to five items in the user's current Shopping Cart. The token displays as the Item-Mini Img, Name & Price content format showing the mini sized image, name, and price below it for the item in their Cart and is for HTML emails only. The item image, item name, and price link back to the item on the Web site. This information is not known for users whose session has expired.	${cart.items.item-1.image_name_price_html} ${cart.items.item-2.image_name_price_html} ${cart.items.item-3.image_name_price_html} ${cart.items.item-4.image_name_price_html} ${cart.items.item-5.image_name_price_html}
Item in Cart Name and Price	These tokens are for text emails and list the item name and display price (not MSRP if exists) for up to five items in the Shopping Cart. This can be used for HTML or text emails.	${cart.items.item-1.name_price} ${cart.items.item-2.name_price} ${cart.items.item-3.name_price} ${cart.items.item-4.name_price} ${cart.items.item-5.name_price}
Item in Cart Name	The item name alone. This can be used for HTML or text emails.	${cart.items.item-1.name} ${cart.items.item-2.name} ${cart.items.item-3.name} ${cart.items.item-4.name} ${cart.items.item-5.name}
Item in Cart Price	The item display price (no MSRP if exists). This can be used for HTML or text emails.	${cart.items.item-1.price} ${cart.items.item-2.price} ${cart.items.item-3.price} ${cart.items.item-4.price} ${cart.items.item-5.price}
Item in Cart Item URL	This token is for text email use and lists the URL to the item page for up to five items in the Shopping Cart. This can be used for HTML or text emails.	${cart.items.item-1.link} ${cart.items.item-2.link} ${cart.items.item-3.link} ${cart.items.item-4.link} ${cart.items.item-5.link}
Item in Cart Item Image URL	URL for item image.	${cart.items.item-1.image_src} ${cart.items.item-2.image_src} ${cart.items.item-3.image_src} ${cart.items.item-4.image_src} ${cart.items.item-5.image_src}
Current Cart Subtotal	Current shopping cart subtotal (not including estimated shipping or tax). This information is not known for users whose session has expired.	${cart.subtotal}
Number of Items in Current Wish List	The number count of items in the users current Wish List. This information is not known for anonymous users who either have a current session or whose session has expired.	${wish_list.items.count}

Token Name	Description	Token
Items in Wish List	Five tokens to represent up to five items in the user's Wish List. The token displays as the Item-Mini Img, Name & Price content format showing the mini sized image, name, and price below it for the item in their Wish List and is for HTML emails only. The item image, item name, and price link back to the item on the Web site. This information is not known for anonymous users who either have a current session or whose session has expired.	${wish_list.items.item-1.image_name_price_html} ${wish_list.items.item-2.image_name_price_html} ${wish_list.items.item-3.image_name_price_html} ${wish_list.items.item-4.image_name_price_html} ${wish_list.items.item-5.image_name_price_html}
Wish List Item Name and Price	These tokens are for text emails and list the item name and display price (not MSRP if exists) for up to five items in the Wish List. This information is not known for anonymous users who either have a current session or whose session has expired. This can be used for HTML or text emails.	${wish_list.items.item-1.name_price} ${wish_list.items.item-2.name_price} ${wish_list.items.item-3.name_price} ${wish_list.items.item-4.name_price} ${wish_list.items.item-5.name_price}
Wish List Item Name	The item name alone. This can be used for HTML or text emails.	${wish_list.items.item-1.name} ${wish_list.items.item-2.name} ${wish_list.items.item-3.name} ${wish_list.items.item-4.name} ${wish_list.items.item-5.name}
Wish List Item Price	The item display price (no MSRP if exists). This can be used for HTML or text emails.	${wish_list.items.item-1.price} ${wish_list.items.item-2.price} ${wish_list.items.item-3.price} ${wish_list.items.item-4.price} ${wish_list.items.item-5.price}
Wish List Item URL	This token is for text email use and lists the URL to the item page for up to five items in the Wish List. This information is not known for anonymous users who either have a current session or whose session has expired.	${wish_list.items.item-1.link} ${wish_list.items.item-2.link} ${wish_list.items.item-3.link} ${wish_list.items.item-4.link} ${wish_list.items.item-5.link}
Wish List Item Image URL	URL for item image.	${wish_list.items.item-1.image_src} ${wish_list.items.item-2.image_src} ${wish_list.items.item-3.image_src} ${wish_list.items.item-4.image_src} ${wish_list.items.item-5.image_src}
Link to Wish List	Shortcut link to user's wish list. Entered in HTML as: "Return to your &lta href=${wish_list_link}&gtWish List". If the user is logged in this link will take them directly to their Wish List. If they are not logged in they will be taken to the account log in page and upon successfully logging in will be taken to their Wish List page.	${wish_list_link}
Link to Cart	Shortcut link to user's Shopping Cart. Enter in HTML as: "Return to your &lta href=${shopping_cart_link}&gtShopping Cart".	${shopping_cart_link}
Link to Order Status	Shortcut link to order status/history. Enter in HTML as: "Check &lta href=${order_status_link}>Order Status". If the user is logged in they will be taken directly to their account Order History page. If they are not logged in they will be taken to the Order Status page.	${order_status_link}
Link to Contact us Email Form	Shortcut link to contact us email form on Web site. Enter in HTML as: "&lta href=${email_form_link}&gtEmail us".	${email_form_link}

Token Name	Description	Token
Link to Home Page	Shortcut link to home page of Web site. Enter in HTML as: Return to OurStore.com.	${home_page_link}
Site URL	The URL for the site.	${site-url}
Date Default Format	The date the email was sent by the system formatted as MM/DD/YYYY.	${date}
Date Time	The time the email was sent by the system displaying as HH:MM a.m./p.m.	${date.time}
Date Long Format	The date the email was sent by the system formatted as Month DD, YYYY.	${date.long}
Date With Weekday Format	The date the email was sent by the system formatted as week day, Month DD, YYYY.	${date.with_weekday}
Track HTML Email Opened Events	Hidden image token that can be put anywhere in the HTML email to track email opened events.	${email_opened_image_src}
Site Name	The name of the site the email is being sent from.	${sitename}

See also

Working with Tables
Working with the Text Editor
Working with the Clock
Working with Image Map Assets

Home > Getting Started > Using the Experience Manager

Using the Experience Manager

The Experience Management section of the Site Manager is used to create an "experience" for visitors to the web site. An experience is away to tailor a visitor's interaction with a site based on what the visitor does on the site. For example, the content displayed to a member who logs in could be different than the content displayed to a visitor who is not a member.

Creating an experience is done by dragging and dropping a combination of user groups, targeted content, awards, and email template components into the body of the experience and populating the properties for each. Once all of the components of an experience are active, the experience will be live on the Web site.

Articles in this section

Areas of the Experience Manager Page

Creating an Experience

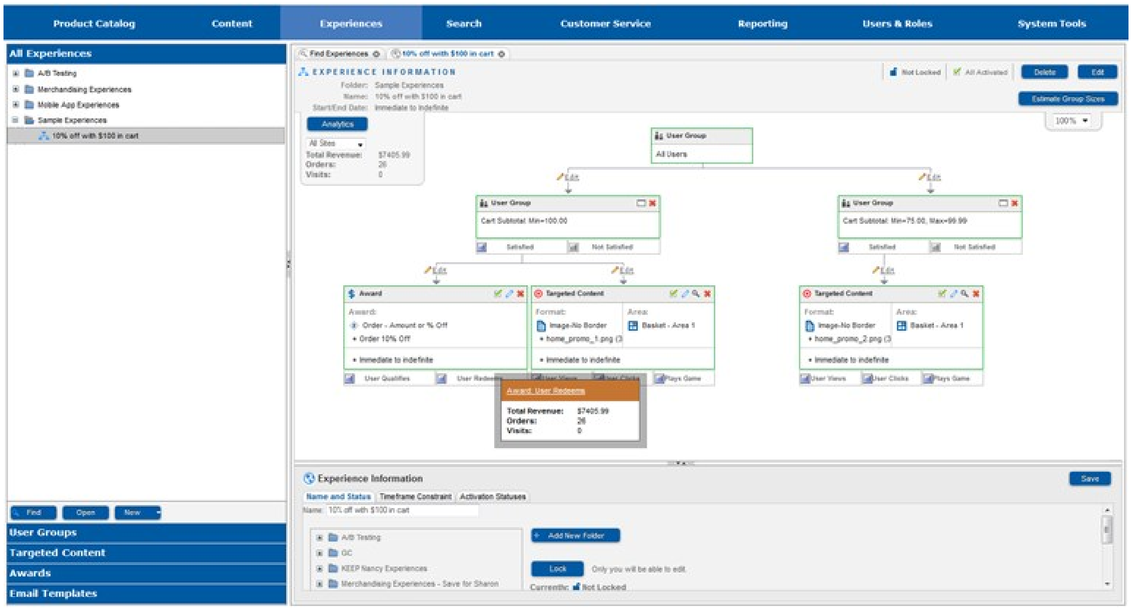
See also

Starting the Site Manager
Navigating the Site Manager
Special Tools

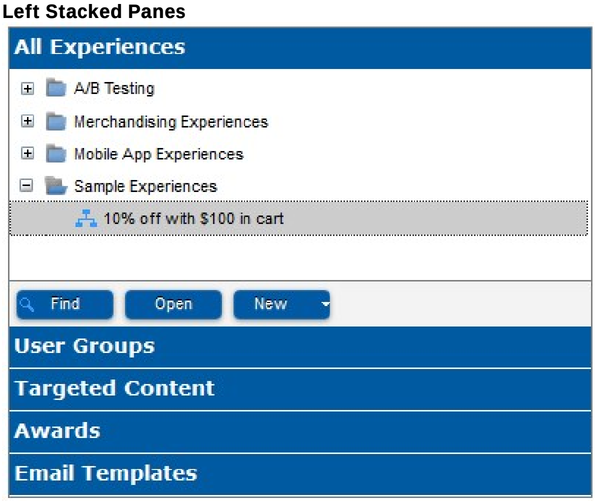
Home > Getting Started > Using the Experience Manager > Areas of the Experience Manager Page

Areas of the Experience Manager Page

The Experience Management section is laid out similar to the other sections of Site Manager, with just a few differences. As with other sections, the left portion of the screen contains the components for Experience Management. In Experience Management, however, the components are divided among sliding stacked panes, with each pane displaying different instances of the component to choose from. The upper right portion of the screen contains the main work portion for Experience Management, where you build and work on the different components in an experience. The lower right portion of the screen is the properties pane, which displays different configuration options for each selected component in an experience.



Left Stacked Panes

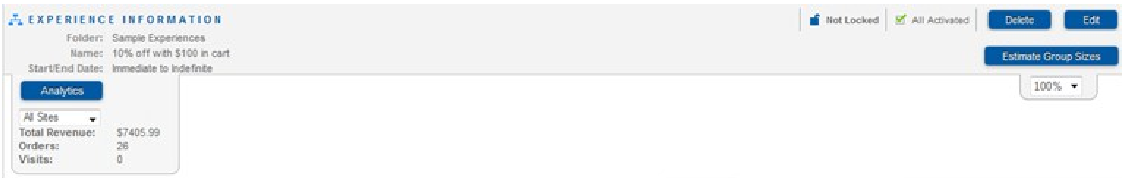


The stacked pane on the left of the screen is where the user makes selections of instances of components and drags them into the body. Existing experiences are opened from the "All Experiences" stacked pane. The display of the left stacked panes is privilege based and if you do not have privileges for a specific component, then the pane for that component will not display.

Work Area - Experience Tabs

Experience tabs display across the top of the upper work area. Each opened experience will show in its own tab. Close a tab by clicking on the gray X icon in the top right of the tab.

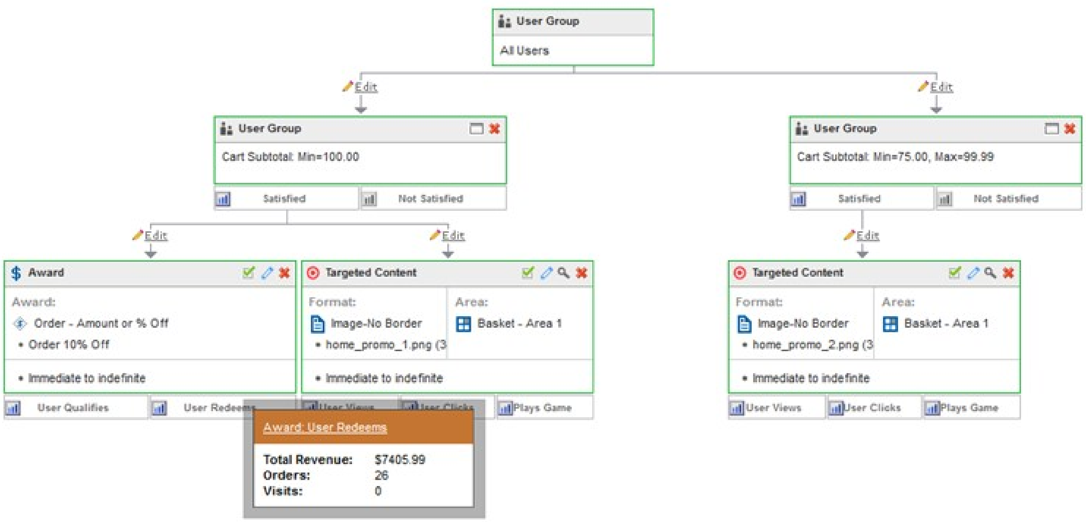
Work Area - Experience Information



Just below the experience tabs in the right-hand work area is a section that contains information on the experience. Depending on the privileges available to you, you may be able to edit and delete the experience from this location.

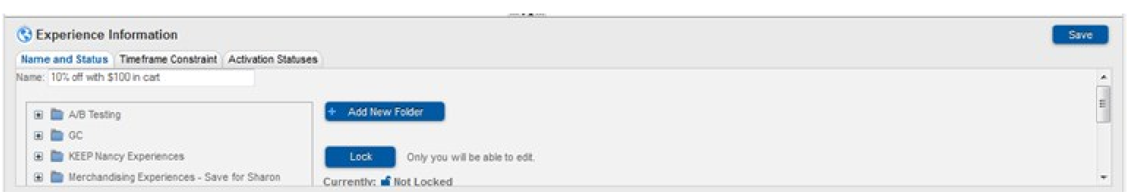
- For active experiences, the "Analytics" section will show information on the performance of the experience, including the revenue earned by it and the number of orders and site visits resulting from it.
- If you select the "Delete" button, the experience will be removed.
- If you select the “Edit” button, the experience information will show in the properties pane, where you can make changes.
- If you select the “Estimate Group Sizes” button, Experience Management will examine a sample of the contents of the site’s database and show the estimated number of website visitors who would fit or not fit each item in the experience. Using this tool you can estimate how useful a particular experience may be when it is active.
- You can change the size of the images displayed in the work area through the percentage drop-down. When working with large experiences, this can be used to view the entire experience without scrolling.

Work Area - Experience Body



The body of the page is where experiences are created. Selections from the sliding panes are dragged into this area and connected to other items that have been dragged in. A non-editable All users user group always displays in the body as a starting point for all experiences. Analytic information is displayed for each experience node when the mouse is hovered over the analytics icon ().

Properties Pane



When a component in an experience is selected in the right-hand work pane, the configuration options for it will appear in the properties pane. The contents of the properties pane will vary depending upon what has been selected. Each component added to an experience will need to be customized through its properties pane settings.

See also

Creating an Experience

Home > Getting Started > Using the Experience Manager > Creating an Experience

Creating an Experience

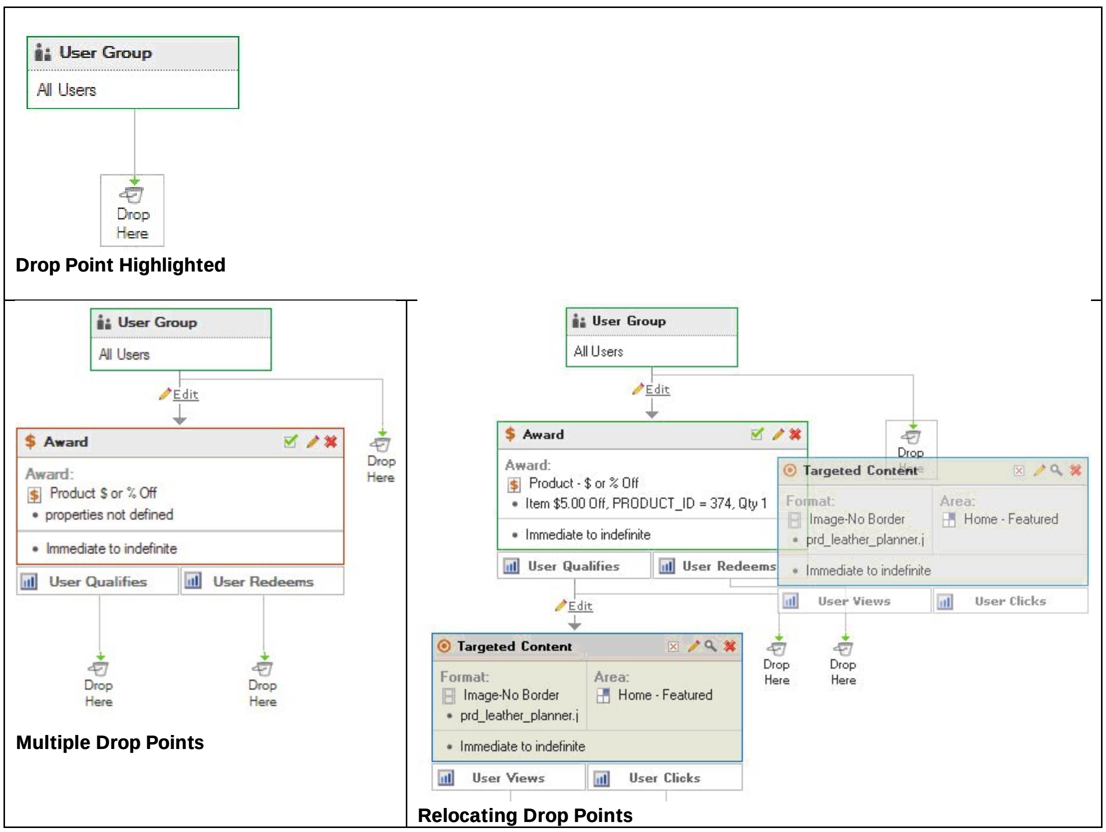
Experiences are created by selecting components from the left stacking pane and dragging them into the right hand work pane. Places where the component may be dropped are indicated by a display of drop points. Once dropped, the component is then customized by making modifications for it in the properties pane.

Each new experience begins with a default component that represents the group of all visitors to a site. New components are added beneath the default one as they are dragged into place. Each type of component has specific ways that additional components may be added to it. These ways are illustrated with small boxes at the bottom of the component, with each box labeled according to what a connection to it would represent. Experiences are built top to bottom, since that is how a visitor to a site would progress through the experience.

Drop Points

Drop points are displayed in the body around each component of an experience when a new component is dragged in. When a user hovers their mouse over a drop point, it will be outlined. Once a drop point is outlined, the component may be dropped onto it and placed in that position in the experience. Drop points are displayed for every connection point of each component in the experience.

You can relocate a component in an experience and move it to another position. Select the header of the component and begin to drag it. Drop points will appear, indicating where you can relocate the component to. Continue to drag the component until a drop point is drawn with and outline, and then drop the component there in the same way you would if you had dragged it in from the left stacked panes.



Drop Point Highlighted

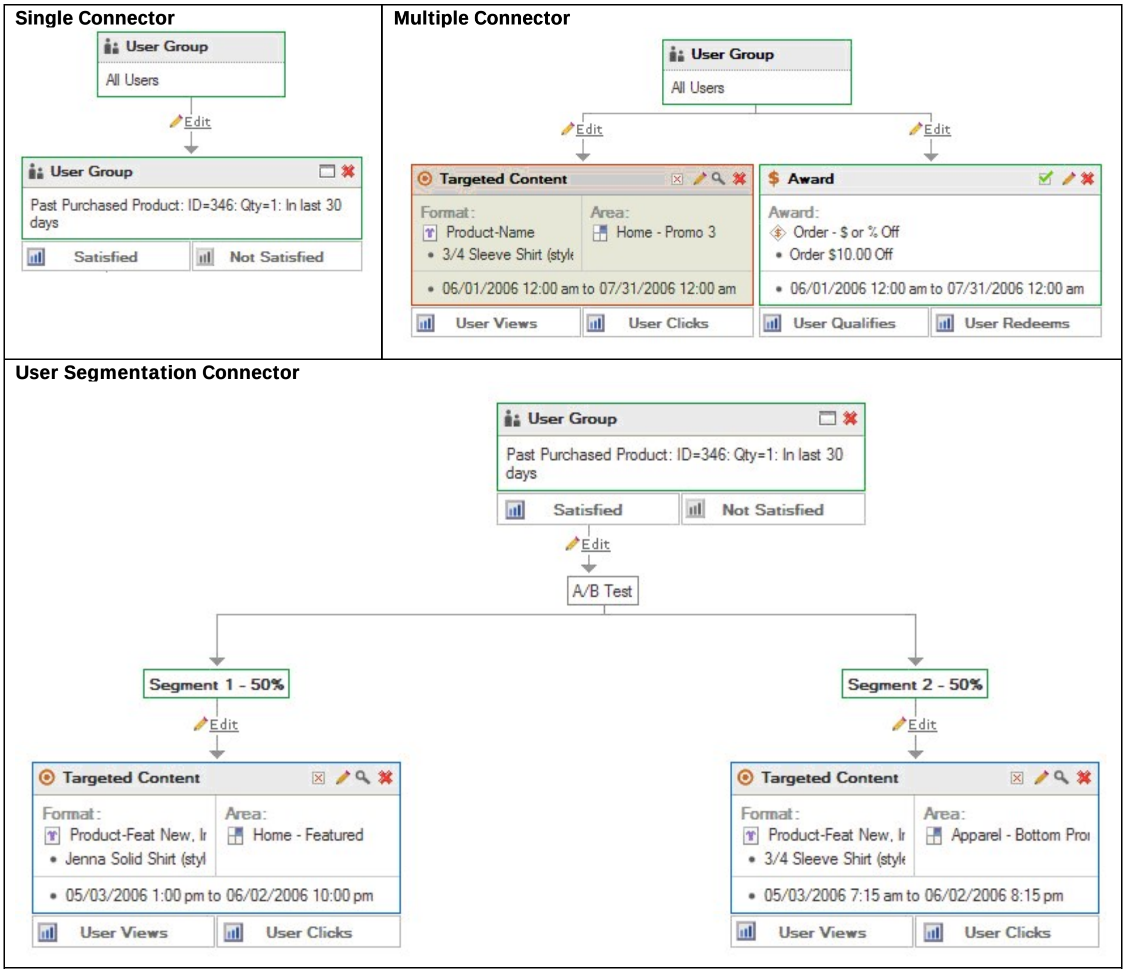
Multiple Drop Points

Relocating Drop Points

Connectors

Connectors are the lines that are drawn between components in an experience. They represent the flow from one component to another. Connectors are automatically added as each new component is dragged onto a drop point in the body of the experience. Connectors can be edited by selecting the "Edit" icon on them and can be changed to segment users to conduct A/B tests. When segmenting users in this way, each segment of the connector can be given a name and a percentage to indicate what percentage of visitors should follow that connection through the experience.

Types of Connectors



Component States

Most of the components that are used for experiences have three different states: incomplete, complete, and active. Incomplete components are drawn with a red outline and usually represent newly dragged in components that have not had their properties customized for the experience. Incomplete components can be completed by customizing the contents of their property panes and saving them. Completed components will be drawn with a blue outline, which indicates they have been customized but are not yet active. Completed components are activated through a selection in their properties pane. Once activated, a component is drawn with a green outline.

User groups are the only components that do not have a separate completed state. After an incomplete user group is customized and the customization is saved, the user group immediately becomes active and is drawn with a green outline.

User Groups

User groups define the audience that any other component following the user group will apply to. User groups are made of one or more "conditions", each of which describes various characteristics a member of the audience may have (e.g. users who are members, have $100 in the cart, have a certain product in their cart, etc.).

Conditions are grouped in the left User Group stacked pane according the characteristic they apply to. When a condition is dragged into an experience, it automatically creates a user group that contains it as the only condition. You can also create user groups that contain multiple conditions. To do that, you drag and drop each condition in separately, but drop the second condition and any additional ones inside the user group that contains the first condition. You then select an and or or relationship between the two conditions to define how the conditions should be evaluated together.

Targeted Content

Targeted content is content that is scheduled to appear in a specific place on a specific page for the website. It is considered "targeted" because it only appears if all the conditions before it in the experience are met. Targeted content may only appear in areas that have been defined within Site Manager to support targeted content.

When scheduling targeted content, you drag either a content asset format or an area into the experience. You then set the properties for the content, including the specifics on where the content will appear and how long it will appear.

Awards

Awards are discounts or specials that a visitor to the website may qualify for based on their activities. Awards are grouped in the left stacking pane according to what they apply to.

Awards are dragged and dropped into experiences just as other components are. Once added to an experience, their various properties will need to be customized in the properties pane.

Email Templates

Email template components are used to represent emails that will be sent to visitors of the website. Emails will only be sent to users who have opted in to receive the email newsletter from the web site. Each template contains suggested text for both an HTML and a text version of the email. Email templates also may contain "tokens", which are generic strings that are substituted for specific strings when the email is actually sent. For example, the token "${first.name}" would be substituted and the first name of the email recipient would appear in its place in the email. The text for the email may be customized once the template has been included in an experience. A schedule for when and how often the email may be sent is set up in the properties pane. New email templates may also be created from within Site Manager, using the buttons available on the bottom of the stacked pane.

See also

Areas of the Experience Manager Page

Home > Site Manager by the Section

Site Manager by the Section

The features provided in the Site Manager are divided into different sections in order group similar functionality together. Each section appears only to users that have been granted permission to work in that section. If a section is mentioned here but is not appearing in your Site Manager, you may not have the correct permissions to work in that section.

Information on each task in each section is included in the articles in this section.

Articles in this section

Product Catalog
Content
Experiences
Search
Customer Service
Reporting
Users and Roles
System Tools

See also

Oracle Legal Notices
Welcome
Getting Started
Tutorials

Product Catalog

The Product Catalog section of the Site Manager provides tools to manage the products, ensembles, categories, and catalogs that appear on the web site.

Articles in this section

- Products
- Ensembles
- Categories
- Catalogs
- Refinements
- Global Product Updates
- Product Types
- Attribute Groups
- Workflow Management
- Automated Categories

Home > Site Manager by the Section > Product Catalog > Products

Products

Use this page to manage the products defined in the site's catalog. You can add, delete, and edit products. On this page you will find information that will help you to:

- find a product
- activate a product
- deactivate a product
- delete a product
- view product thumbnails
- manage a variant's swatch and color images
- change a product's workflow status
- add a comment to a product
- view the changes made to a product
- create a product
- edit a product
- preview a product
- create a new order and add a product to it
- customize a product for a locale (international sites only)

To find a product:

1. Select the "Find a Product" tab.
2. Enter a search term in the "Search Term" text box. This can be a style number, keyword, product name, or category ID.
3. Use the "Search By" dropdown list-box to the search method to use.
4. Select "Find". A listing of all matches will appear below.

To activate a product:

1. Find the product you wish to activate.
2. Check the "Active" check box to the right of the product name.

To deactivate a product:

1. Find the product you wish to deactivate.
2. Uncheck the "Active" check box to the right of the product name.

To delete a product:

1. Find the product you wish to delete.
2. Select the "Delete" icon to the right of the product name.

To view thumbnails of product images:

1. Find the product(s) whose images you want to view.
2. Hover your mouse over the "Thumbnails" icon for each product. The thumbnail will be displayed in a pop-up window.
3. To view thumbnails for all the products at once, select the "Show Thumbnails" check box. The thumbnails will be displayed in the "Thumbnails" column.

To manage a product's alternate color images and swatches:

1. Find the product whose images you wish to modify.
2. Select the "Product Name" or the "Edit" icon to the right of the product name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Merchandising", "Variants", "Files", "Dynamic Attributes" (available on non-international sites only), and "Categories". A "Locales" tab will be available if the site is an international site.
3. Select the "Variants" tab.
4. Select "Group by Color". The page will refresh and you will see a listing of the variants, grouped by the colors of the variants.
5. Select the "Edit" icon for the color group whose alternate color image or swatch image you want to modify. The bottom of the page will refresh and you will see settings for the color group.
    - To add a color swatch to the variant, select "Swatch Image -> Add Image". The image browser will appear and will fill the tab. Locate and the double-click the swatch image to add it and dismiss the image browser.
    - To change an existing swatch image, select "Swatch Image -> Remove". This will remove the existing image. Select "Swatch Image -> Add Image" to select a new image. The image browser will appear and will fill the tab. Locate and the double-click the swatch image to add it and dismiss the image browser.
    - To remove a swatch image, select "Swatch Image -> Remove".
    - To add an alternate color image in the variant's color, select "Recolored Image -> Add Image". The image browser will appear and will fill the tab. Locate and the double-click the color image to add it and dismiss the image browser.
    - To change an existing alternate color image, select "Recolored Image -> Remove". This will remove the existing image. Select "Recolored Image -> Add Image" to select a new image. The image browser will appear and will fill the tab. Locate and the double-click the new image to add it and dismiss the image browser.
    - To remove an alternate color image, select "Recolored Image -> Remove".
6. Select "Update Variant Group" to save the changes.

To change the workflow status of a product:

1. Find the product whose status you wish to change.
2. Select the "Product Name" or the "Edit" icon to the right of the product name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Merchandising", "Variants", "Files", "Dynamic Attributes" (available on non-international sites only), and "Categories". A "Locales" tab will be available if the site is an international site.
3. At the top of the page is a workflow status section that describes the current status of the product. You may only change the status of a staged version of the product.
4. Select the drop-down list box to expand it and see the statuses that you have permission to set the product to.
5. Select the desired status.
6. If the product is being scheduled for release to the website, the date and time when the product will be available may be entered in the "Release Date" fields.
7. Select "Save".

To attach a comment to a product:

1. Find the product you wish to add a comment to.
2. Select the "Product Name" or the "Edit" icon to the right of the product name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Merchandising", "Variants", "Files", "Dynamic Attributes" (available on non-international sites only), and "Categories". A "Locales" tab will be available if the site is an international site.
3. Select "Attach Comment". A new window will appear.
4. In the window, enter your comment.
5. Select "Save & Close". The window will close.
6. The comment will appear in the "Record Summary" tab for the product.
7. Select "Back to Find Products" to return to the previous page.

To view the changes made to a product:

1. Find the product you wish to review.
2. Select the "Product Name" or the "Edit" icon to the right of the product name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Merchandising", "Variants", "Files", "Dynamic Attributes" (available on non-international sites only), and "Categories". A "Locales" tab will be available if the site is an international site.
3. The "Record Summary" tab contains information on all the changes made to the product.
4. Use the "Audit Trail & User Comments" list box to view a list of the users who have made changes to the product.
5. Use the "Staged Changes: Variations from Master Record" list box to view a list of the changes that have been made to the product. Select "Edit" to the left of any change to move to the tab the change was made in.
6. Reports that are available are listed in the "Run Report" drop-down list box. To run a report, select the report and then select "Go".

To create a product:

1. Select the "Create a Product" tab.
2. Enter a name for the product.
3. Select "Create a Product". A new page will appear with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Merchandising", "Variants", "Files", "Dynamic Attributes" (available on non-international sites only), and "Categories". A "Locales" tab will be available if the site is an international site.
4. At the top of the page is a workflow status box that displays the current status of the product. New products are given a status of "New". Products with a status of "New", however, cannot be edited. The status must be changed in order to add additional information about the product.
   - Select the workflow status drop-down list box.
   - Select the "Work in Progress (WIP)" status. The status area will redraw and expand.
   - Select the "Save" button to save the new status.
5. Select "Record Summary" to view the changes that have been made to the product. For a new product, the only changes noted will be that the product was created and that the status was changed to "Work in Progress (WIP)".
6. Select the "Attributes" tab and fill in the attributes for the product. Many of the fields on this tab are self-explanatory. Information is provided below for selected fields:
   - Select or deselect the "Active" checkbox to make the product active or inactive. Inactive products do not appear on the website.
   - HTML tags can be used in the product name if desired.
   - Enter a start and end date and time for the product. If the start date is left blank, the product will start immediately. If the end date is left blank, the product will run indefinitely and will need to be deactivated by hand at a later date.
   - In the "Variant" drop-down list(s), select the label(s) that will be used on the product detail page for the variant drop-down lists. The first variant selected here will be the first variant that appears on the product detail page. Users will need to make a selection for that variant before they can make a choice in any variant lists that follow.
   - If the product is to be excluded from discounts, select the type(s) of discounts it should be excluded from: order discounts, shipping discounts, and/or item discounts.
   - A "Product Template" is used to customize the way a product will appear on the website. Select the product template to be used for this product. If a template is not selected, the product will appear according to the template defined for the category it appears in, or according to the default rules for the website.
   - The "Name" field in "Product Group" provides a way of grouping products together to be used in promotions. Enter the name of the group that the product should belong to for promotional purposes.

   Select "Save Attributes" to save your changes.
7. Select the "Images" tab and enter the primary and alternate images for the product.
   - Select the "Add Image" button to browse to the image to be added. The image browser will appear and fill in the tab. Use the folder tree on the left hand side of the image browser to locate the folder the image is in. Once the image has been located, double-click it to add it to the product. The image browser will dismiss and the selected image will

appear in the "Current Product Images" section of the tab. Repeat this step for each image for the product.
    - Alternative names are used by assistive screen readers and search engine spiders to identify the product. To change the alternate name chosen for the product, enter a new alternative name in the "ALT name" field. Select "Update" to save the change. Select "Restore Original" to restore the alternate name to the original alternative name created for the product.
    - In the "Current Product Images" section, select "Primary Image" for the primary image for the product. This will be the main image displayed on the website.
    - Deselect "Active" for any image that should not appear on the website.
8. Select the "Metadata" tab and enter the Search Engine Optimization (SEO) terms along with site search terms for the product. SEO terms are the terms that will be made available to internet search engines for the product. Site search terms are the terms that the product will be considered a match for when a user conducts a search using them. Select "Save Metadata" to save your changes.
9. Select the "Merchandising" tab to select cross-sell and up-sell products for the new product.
    - Select the type of relationship you want to work with in the "Category" drop-down.
    - Select the products and/or ensembles that should be related to the product with the "Add Product" and "Add Ensemble" buttons.
    - Order the products you added by clicking and dragging them in the list. The order in the list indicates the order that they should appear in on the product detail page. While there is a limit to the number of related items that will appear on the product detail page, items farther down on the list may appear if some of the top items are out of stock.
    - The "Products Purchased With" and "Products Ensembled With" list boxes will be empty, as this is a new product that has not yet been purchased.
10. Select the "Variants" tab and enter the variants for the product.
    - To create a new variant for the product, select the "Add New Variant" button. The page will refresh and you will see a number of fields to fill in with information for the new variant. Select "Save Variant" when you have entered all the information.
    - To associate an existing variant with this product, select the "Add Existing Variant" button. A new window will appear. Search for the variant by SKU or UPC number. If a matching variant is found, the window will disappear and the variant will be shown in a list on the "Variants" tab. Note - if the variant was associated with a different product, associating it with this variant will cancel the previous association and it will no longer appear with the other product.
    - Select the "Active" checkbox to make the variant active. Deselect the "Active" checkbox to make the variant inactive. Inactive variants will not appear on the website.
11. Select the "Files" tab to associate a file with the product.
    - Select "Add Product File" to add a file to the product. The page refreshes.
    - Select the type of file you are adding from the "Product File Type" drop-down list.
    - Enter the name of the file in the "File Name" field. Select "Select File" if you prefer to browse to find the file.
    - Enter a display name for the file in the "Display Name" field.
    - Select "Save File" to save the file. The page will refresh and you will be returned to the "Files" tab, which will show a list of the files associated with the product.
12. Select the "Dynamic Attributes" tab to enter dynamic attribute values for the product.
    - Use the "Set Product Type" drop-down list box to choose the product type that applies to the product. The page will refresh and you will see a listing of all of the attributes and their values for the attribute group.
    - Enter values for each attribute that the product has values for.
    - Select "Save".
13. Select the "Categories" tab to add the product to a category.
    - Select "Add Category" to choose the category the product will appear in. A new window will pop-up.
    - Use the controls in the new window to navigate to the category.
    - Select the category. The category will appear in the "Categories" tab, along with a message stating the product has been added to the category.
    - Continue selecting categories until all the categories the product should appear in have been chosen.
    - Close the category selecting window.
    - In the "Categories" tab, activate each category the product should begin appearing in.
14. If the site is an international site, select the "Locales" tab to customize attributes of the product for selected locales.
    - Select the edit icon to the right of a locale in the "Product Attributes" list. The page will refresh and you will be able to customize the product's name, template, description, more information content, image ALT text, meta description, meta keywords, or on-site search keywords. See Product Attributes by Locale for additional information. Select "Save Updates" after entering the new information.
    - Select the edit icon to the right of a locale in the "Product Price Attributes" list. The page will refresh and you will be able to customize the Manufacturer's Suggested Retail Price for the product. See Product Price by Locale for additional information. Select "Save Updates" after entering the new information.
    - Select the edit icon to the right of a locale in the "Product Variant Attributes" list. The page will refresh and you will be able to customize attributes for selected variants of the product. See Product Variant by Locale for additional information. Select "Save Updates" after entering the new information.
15. If you have sufficient privileges, you can modify the workflow status of the product at the top of the page and indicate that the changes for the product are complete. Set the status to the desired status. Products must be set to "Approved" before they will be scheduled to appear on the site.
16. Select "Back to Find Products" to return to the previous page.

To edit a product:

1. Find the product you wish to edit.
2. Select the "Product Name" or the "Edit" icon to the right of the product name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Merchandising", "Variants", "Files", "Dynamic Attributes" (available on non-international sites only), and "Categories". A "Locales" tab will be available is the site is an international site.
3. Select the "Record Summary" tab to view the changes that have occurred with the product.
4. Select the "Attributes" tab to modify the attributes for the product. Many of the fields on this tab are self-explanatory.

Information is provided below for selected fields:

- Select or deselect the "Active" checkbox to make the product active or inactive. Inactive products do not appear on the website.
- HTML tags can be used in the product name if desired.
- Change the start and end date and time for the product as desired. If the start date is left blank, the product will start immediately. If the end date is left blank, the product will run indefinitely and will need to be deactivated by hand at a later date.
- In the "Variant" drop-down list(s), select the label(s) that will be used on the product detail page for the variant drop-down lists. The first variant selected here will be the first variant that appears on the product detail page. Users will need to make a selection for that variant before they can make a choice in any variant lists that follow.
- If the product is to be excluded from discounts, select the type(s) of discounts it should be excluded from: order discounts, shipping discounts, and/or item discounts.
- A "Product Template" is used to customize the way a product will appear on the website. Select the product template to be used for this product. If a template is not selected, the product will appear according to the template defined for the category it appears in, or according to the default rules for the website.
- The "Name" field in "Product Group" provides a way of grouping products together to be used in promotions. Enter the name of the group that the product should belong to for promotional purposes.

Select "Save Attributes" to save your changes.

5. Select the "Images" tab to modify the primary or alternate images for the product.
   - To add an image, select the "Add Image" buttom. The image browser will appear and fill in the tab. Use the folder tree on the left hand side of the image browser to locate the folder the image is in. Once the image has been located, double-click it to add it to the product. The image browser will dismiss and the selected image will appear in the "Current Product Images" section of the tab.
   - To change the alternate name for the product, enter an alternative name in the "ALT name" field. Select "Update" to save the change. The alternate name will be used by assistive screen readers and search engine spiders to identify the product.
   - Select "Restore Original" to restore the alternate name to the original alternative name created for the product.
   - To change the primary image of the product, select "Primary Image" for the new primary image in the "Current Product Images" section.
   - To remove an image, select "Delete" under the image to be removed in the "Current Product Images" section
   - Select/deselect "Active" to activate/deactivate any image. Only active images will appear on the website.
6. Select the "Metadata" tab and enter the Search Engine Optimization (SEO) terms along with site search terms for the product. SEO terms are the terms that will be made available to internet search engines for the product. Site search terms are the terms that the product will be considered a match for when a user conducts a search using them. Select "Save Metadata" to save your changes.
7. Select the "Merchandising" tab to modify the cross sells and up sells for the product. Cross sells and up sells will appear on the product details page for this product.
   - Select the type of relationship you want to work with in the "Category" drop-down.
   - Add products and/or ensembles to the "Manual Associations" list with the "Add Product" and "Add Ensemble" buttons.
   - Modify the order of products in the "Manual Associations" list by clicking and dragging them in the list. The order in the list indicates the order that they should appear in on the product detail page. While there is a limit to the number of related items that will appear on the product detail page, items farther down on the list may appear if some of the top items are out of stock.
   - Select the "Remove" icon to remove a product from the "Manual Associations" list.
   - View products this product has been purchased and/or ensembled with by selecting a timeframe from the "Pull products from the following date range" list box.
   - Move products from the "Products Purchased With" or "Products Ensembled With" list to the "Manual Associations" list by selecting the "Assigned" checkbox. You may then order the added product along with the other products in the "Manual Association" list.
8. Select the "Variants" tab to modify the variants for the product.
   - To modify a single variant, select the "Show All" button to see all the variants. Select the "Edit" button for the variant you wish to change. The page refreshes and you can make changes for the variant. Select "Save Variant" to save your changes and return to the main "Variants" tab.
   - To modify a group of variants, select "Group by Size" or "Group by Color". The page refreshes and a list of the groups of variants will be shown. To view all of the variants in one of the groups, select the "View All" icon for that group. The page refreshes and you will see a list of the variants in that group. To make the same change to all of the variants in one group, select the "Edit" icon for that group. The page will refresh and a listing of the items that can be modified for the group will be displayed at the bottom of the page. Make your changes, then select "Update Variant Group" to save them.
9. Select the "Files" tab to modify the product files for the product.
10. Select the "Dynamic Attributes" tab to modify dynamic attribute values for the product.
    - Use the "Set Product Type" drop-down list box to choose the product type that applies to the product.
    - Modify values for each attribute that the product has values for.
    - Select "Save".
    - Select the workflow status drop-down list box at the top of the page to change the workflow status.
    - Select "Back to Find Products" to return to the previous page.
11. If the site is an international site, select the "Locales" tab to modify attributes of the product for specific locales.
    - To modify a product's name, template, description, more information content, image ALT text, meta description, meta keywords, or site search keywords, select the edit icon to the right of the locale in the "Product Attributes" list that you wish to modify them for. The page will refresh and you will be able to make the appropriate changes. See Product Attributes by Locale for additional information. Select "Save Updates".
    - To modify a product's Manufacturer's Suggested Retail Price, select the edit icon to the right of a locale in the "Product Price Attributes" list that you wish to modify it for. The page will refresh and you will be able to make the appropriate changes. See Product Price by Locale for additional information. Select "Save Updates".
    - To modify a product variant's color name, size name, or taxable status, select the edit icon to the right of a locale in the

"Product Variant Attributes" list that you wish to modify them for. The page will refresh and you will be able to make the appropriate changes. See Product Variant by Locale for additional information. Select "Save Updates".

To preview a product:

1. Find the product you wish to preview.
2. Select the "Product Name" or the "Edit" icon to the right of the product name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Merchandising", "Variants", "Files", "Dynamic Attributes" (available on non-international sites only), and "Categories". A "Locales" tab will be available if the site is an international site.
3. Select the "Preview" button. A new instance of your browser will be brought up with a preview of the product in it.
4. Close the browser instance when done previewing.
5. Select "Back to Find Products" to return to the previous page.

To create a new order and add a product to it (available only to users with the appropriate privileges):

1. Find the product you wish to add to an order.
2. Select the "View" icon to the right of the product. A dialog box will appear.
3. Enter the quantity of the product to be purchased in the "Quantity" text field.
4. Select "Add to Cart".
5. A confirmation box will appear asking if a new order should be started and the product added to the order. Select "Yes".
6. The Site Manager screen will refresh and the Customer Service->New Order screen will be displayed. The selected product will appear in the order.
7. For additional information on placing orders, see New Order.

To customize a product for a locale (international sites only):

1. Find the product you wish to preview.
2. Select the "Product Name" or the "Edit" icon to the right of the product name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Merchandising", "Variants", "Files", "Categories", and "Locales".
3. Select the "Locales" tab. The page will refresh and you will see a lists of locales, divided according to the type of product attributes that you can customize.
4. To customize a product's name, template, description, more information content, image ALT text, meta description, meta keywords, or site search keywords, select the edit icon to the right of the locale in the "Product Attributes" list that you wish to modify them for. The page will refresh and you will be able to make the appropriate changes. See Product Attributes by Locale for additional information. Select "Save Updates".
5. To customize a product's Manufacturer's Suggested Retail Price, select the edit icon to the right of a locale in the "Product Price Attributes" list that you wish to modify it for. The page will refresh and you will be able to make the appropriate changes. See Product Price by Locale for additional information. Select "Save Updates".
6. To customize a product variant's color name, size name, or taxable status, select the edit icon to the right of a locale in the "Product Variant Attributes" list that you wish to modify them for. The page will refresh and you will be able to make the appropriate changes. See Product Variant by Locale for additional information. Select "Save Updates".

Articles in this section

Find a Product | Create a Product | Record Summary | Attributes | Images | Videos

Metadata | Merchandising | Variants | Files | Dynamic Attributes | Categories

Locales

See also

Ensembles
Categories
Catalogs
Refinements
Global Product Updates

Product Types
Attribute Groups
Workflow Management
Automated Categories

Home > Site Manager by the Section > Product Catalog > Products > Find a Product

Find a Product

The Find a Product tab allows you to find a product. For general information on working with products, see the Products page.

Search Term: Enter a term that will be used to identify the product you are searching for.

Search By: Use this drop-down list box to select the search method to use.

Find: Select this button to start the search. The search results will be displayed beneath the Find a Product tab.

See also

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Create a Product

The Create a Product tab allows you to create a new product. For general information on working with products, see the Products page.

Text Box: Enter the name of the new product.

Create Product: Select this button to create the product. The page will redraw with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Merchandising", "Variants", "Files", "Dynamic Attributes" (availalble for non-international sites only), and "Categories". A "Locales" tab will also be available if the site is an international site. Enter the appropriate information in each tab. Additional information on creating products may also be found here.

See also

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Record Summary

The Record Summary tab provides information on the modifications that have been made to the product. At any point in time, there can be only two versions of a product: a "master" version, which is approved for appearance on the website, and a "staged" version, which is in the process of being modified.

Run Report: Use this drop-down list box to select reports to run to obtain more detailed information about changes. Select "Go" to run the report.

Live Master Record: This summary box contains information on the master version of the product. The title bar shows the current status of the master version of the product. The date and time the product first ran is listed with the "Start Date", and the date and time the master version of the product is listed with the "Updated Date".

Staged Changes: This summary box contains information on the staged version of the product. If there is not currently a staged version, that will be noted in the box. The title of the box contains the current workflow status of the staged version. "Release Date" will show the date and time that the staged version is scheduled to be released for appearance on the website. "Last Updated" shows the date and time the staged version was last modified. "Variations" lists the number of modifications that have been made to the staged version. Selecting the number of changes will open a new tab, which will list all of the changes that have occurred. Selecting "RESET RECORD" will erase of all the changes and the staged version will revert back to match the master version of the product.

Audit Trail & User Comments: This summary box provides a listing of each modification that has been made to the product, both to the master and the staged versions. Selecting "View" for any modification will open a new window, with a larger view of each modification.

Staged Changes: Variations from Master Record: This summary box provides a listing of all of the changes that have been made to the staged version of the product. Selecting "Edit" for any change will open the product tab that change was made in (for example, selecting "edit" for a modification to the "Product Name" field will open the "Attributes" tab).

See also

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Attributes

The Attributes tab provides a number of different attributes for the product.

Active: This checkbox indicates whether or not the product is active and available for presentation on the website.

Show Swatches: This checkbox indicates whether or not color swatches should be displayed for the product.

Product Information: This summary box contains information about the product.

- **Product Name**: This is the name that will appear on the website for the product. This is a required field.
- **Style #**: This is the style number (if any) assigned to the product.
- **Start Date**: This is the date the product will first become available for presentation on the website. An empty date means the product will be available immediately.
- **Start Time**: This is the time on the start date that the product will be available for presentation on the website. An empty time means the product will be available immediately.
- **End Date**: This is the last date that the product will be available for presentation on the website. An empty date means the product will continue to run until it is manually removed.
- **End Time**: This is the time on the last day that the product will no longer be available for presentation on the website. An empty time means the product will continue to run until midnight on the last day.
- **Variant 1**: Use this drop-down list box to select the first variant that will be listed on the website for the product.
- **Variant 2**: Use this drop-down list box to select the second variant that will be listed on the website for the product.
- **Gift Wrap Available**: This checkbox indicates whether or not gift wrapping is available for the product. Do not modify this checkbox if your product is a gift card or a gift certificate.
- **Exclude From Order Discounts**: This checkbox indicates whether or not order discounts may be applied to the product.
- **Exclude From Shipping Discounts**: This checkbox indicates whether or not shipping discounts may be applied to the product.
- **Exclude From Item Discounts**: This checkbox indicates whether or not item discounts may be applied to the product.

Product Template: This summary box contains the name of the product template, if any, to be used with the product. The product template is a pre-defined template that affects the formatting of the product detail page. If a product template is selected here, it will override any other formatting for the product detail page of the current product. Use the "Product Template" drop-down list box to select a product template. Do not modify this field if your product is a gift card or gift certificate.

Product Group: This summary box contains information on the product group (if any) that the current product belongs to. Product groups are used to combine products into a unit that can be associated with awards and other items. Enter the name of the product group in the "Name" text entry field.

Descriptions: This summary box contains the set of descriptions used on the product detail page to describe the product.

- **Description**: This is the primary description of the product and should include the most important information about it. The description may be formatted using the formatting tools of the text editor box.
- **More Information Content**: This is secondary information for the product, usually displayed at a lower position on the product detail page. The description may be formatted using the formatting tools of the text editor box. Do not modify this field if your product is a gift card or gift certificate.

Associated Catalogs: This area contains the sites and catalogs the product is associated with. The sites will be listed first, with the catalogs in each site listed beneath them.

Save Attributes: This button is used to save modification made on this tab. Modifications will not be saved unless this button is selected.

See also

Find a Product
Create a Product
Record Summary
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Locales

Home > Site Manager by the Section > Product Catalog > Products > Images

Images

The Images tab allows you to manage the image(s) for the current product. These images will be displayed on the website on the product detail page for the product.

Add Image: This summary box allows you to add an image to the product.

- **Image File Name**: Enter the name of an image file in this field. The following characters are not permitted in image file names: \ ; / ? : @ & = + $, * " < > | ' { } % as well as spaces.
- **Look Up**: Select this button to search for the image. If the image is found, it will appear next to the Image File Name field.
- **Add Image**: Select this button to add an image to the product. The "Look Up" button must have been used to find an image prior to this button being selected.

Define Alternate Name: This summary box contains the information to define the alternate image name for the product. The alternate name is used by assistive screen readers and search engine spiders and should indicate what the image represents. Although a product may have multiple images, only one alternate image name is necessary per product. The default alternate image name that will be provided for the product will be " at ".

- **ALT Name**: This text entry field contains the alternate image name for the product. Modify this as necessary.
- **Update**: Selecting this button will save any modifications to the alternate image name. No modifications will be saved until this button is selected.
- **Restore Original**: Selecting this link will restore the alternate image name to its default value, which is " at ". Select "Update" after selecting this link to save the default name as the alternate image name.

Current Product Images: This summary box contains all the images currently associated with the product. Select "Primary Image" under the image that should be the primary image for the product. Activate and deactivate images by selecting and deselecting the "Active" checkbox underneath each image. Inactive images will not appear on the website. Remove an image by selecting the "Delete" icon beneath it.

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Videos

Use the "Videos" tab to manage videos associated with the product.

Add Video: Use the fields in this area to add a video to the product.

- **Video Type**: This field indicates the type of video that can be added.
- **Video File Name**: Enter the file name of the video in this field.
- **Look Up**: Select this button to begin a search on the server that contains the videos. The search will look for a video with the name entered in the "Video File Name" field. If the video is found, a viewer window will appear and will play the video.
- **Add Video**: Select this button to add the video to the product. The screen will refresh and the video will appear in the "Current Product Videos" area.

Current Product Videos: This section contains images of all videos associated with the product.

- **Active**: Select/deselect this checkbox to activate/deactivate the video. Inactive videos will not appear on the website.
- **Delete**: Select this icon to remove the video from the product.

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Home > Site Manager by the Section > Product Catalog > Products > Metadata

Metadata

The Metadata tab contains information that used to make the product easier to find during searches.

SEO: The SEO summary box contains information that is used for Search Engine Optimization, or external search engines. The items in this box are meant to be used to help external search engines locate the product.

- **Exclude from XML Sitemap:** Select this checkbox to exclude the category detail page from the sitemap that is generated for SEO.
- **Change Frequency:** Select a value from this drop-down to indicate how frequently the category detail page is updated. This will be included in the generated sitemap for the site.
- **Priority:** Select a value from this drop-down to indicate how important the category detail page is in comparison to other pages on the site. The higher the number chosen, the higher the importance of the category detail page. This will be included in the generated sitemap for the site.
- **URL Name Overrride**: Enter text that will replace the product name in the dynamically-generated SEO-friendly URL of the ensemble. Capital letters will be replaced with lowercase letters. Blank spaces and non-alphanumeric characters will be replaced by a dash.
- **Page Title Override**: Enter text that will replace the dynamically generated SEO page title. Note - If the site generates page titles such that they contain standard text (e.g., appending the site name within the page title), the standard text will be added to the page title entered in this field.
- **Meta Description**: This text box contains the description that should be made available to external search engines.
- **Meta Keywords**: This text box contains the search keywords that will be made available to external search engines. Meta keywords appear in the source for product page.

Site Search: The Site Search summary box contains information that is used by the site's search engine to locate the product. Enter the list of keywords which can be used to match the product in the "Keywords" text field.

Save Metadata: This button saves the changes made on this tab to the database. Any changes made will not be saved unless this button is selected.

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Merchandising

The Merchandising tab provides ways to manage the cross sell and up sell items that are displayed with the current product.

Category: This drop-down list box allows you to choose between "Cross Sells" and "Up Sells". All of the information on the rest of this tab will correspond to whatever is selected in this drop-down.

Show Thumbnails: To view thumbnails for all of the products in the "Manual Associations", "Recommended Products", and "Products Ensembled" with list boxes, select the "Show Thumbnails" check box. The thumbnails will be displayed in the "Thumbnails" column in each list.

Manual Associations: This summary box contains a list of cross sell and up sell items that have been explicitly associated by hand with this product. Manually associated items can be added using the "Add Product" or "Add Ensemble" button (see below). Manually associated items can be removed by selecting the "Remove" icon. They can be activated and deactivated by selecting or deselecting the "Active" checkbox. Inactive products will not be shown as a cross sell or up sell.

Add Product: This button allows you to add a product to the list of manually associated items. A pop-up window will appear when you select this button, allowing you to select the product you want to add.

Add Ensemble: This button allows you to add an ensemble to the list of manually associated items. A pop-up window will appear when you select this button, allowing you to select the ensemble you want to add.

Recommended Products: This summary box lists items that have been purchased most frequently with the current product. To use one of these products as a cross sell or up sell, select the "Assigned" checkbox. The page will refresh and the item will appear in the "Manual Associations" list box. Its "Assigned" checkbox will now also be checked. If an item has its "Assigned" checkbox checked and you wish to remove its association with the current product, locate the item in the "Manual Associations" list box and select the "Remove" icon for in that box for the item. The page will refresh and the item will be removed from the "Manual Associations" listbox and its "Assigned" checkbox will be unchecked. Products that do not have "Assigned" checked will not be used as a cross sell or up sell.

Pull products from the following date range: This drop-down list box contains different time periods that can be used to populate the "Recommended Products" list. Select the time period that you wish to view products from.

Products Ensembled with: This summary box contains a list of products that are included in ensembles with the current product. To use one of these products as a cross sell or up sell, select the "Assigned" checkbox. The page will refresh and the item will appear in the "Manual Associations" list box. Its "Assigned" checkbox will now also be checked. If an item has its "Assigned" checkbox checked and you wish to remove its association with the current product, locate the item in the "Manual Associations" list box and select the "Remove" icon for in that box for the item. The page will refresh and the item will be removed from the "Manual Associations" listbox and its "Assigned" checkbox will be unchecked. Products that do not have "Assigned" checked will not be used as a cross sell or up sell.

Preview (Including Automated Merchandising Selection): This preview pane shows thumbnails all of the items currently selected as cross sells or up sells for the product.

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Home > Site Manager by the Section > Product Catalog > Products > Variants

Variants

The Variants tab provides way to manage the individual variants of the current product. Each variant equates to a particular item or SKU on a store shelf.

Display Options: This set of radio buttons provides different ways of viewing the variants for the product. Selecting each radio button adjusts what is shown in the list in the lower portion of the page.

- **Show All**: Selecting this radio button will generate a list of each individual variant. Select "Edit" to edit any variant. Select or deselect "Active" to activate or deactivate a variant. Inactive variants will not be available on the website. Select "Delete" to remove a variant.
- **Group by Size**: Selecting this radio button will generate a list of the different sizes of the variants. Selecting "View All" for any size will show the individual variants that come in the selected size.
- **Group by Color**: Selecting this radio button will generate a list of the different colors of the variants. Selecting "View All" for any color will show the individual variants that come in the selected color.
- **Group All**: Selecting this radio button will create one group that contains all of the variants for the product. Selecting "View All" will expand the group out into the original list of variants.

View by Source: This dropdown list box contains all the sources for the variants. Selecting a source will adjust what is shown in the list in the lower portion of the page. Variants not available from the selected source will not be shown in the list. You may also select "No source specified", which will display all variants that have no source for them.

Add Existing Variant: This button allows you to add an existing variant to the product. This button is only available when "Show All" has been selected as the display option and the Master version of the product is being edited. The "Select Product" pop-up will appear. Enter information to find the variant that you will be adding. If the variant is found, the window will dismiss and the variant will be included in the list of variants.

Create New Variant: This button allows you to create a new variant and add it to the product. This button is only available when "Show All" has been selected as the display option and the Master version of the product is being edited. The Create New Variant page will appear. Enter the information for the new variant, then select "Save Variant".

Edit Dynamic Attributes: This button allows you to set dynamic attributes for any or all of the variants. This button is only available on non-international sites. On international sites dynamic attributes are set on the Locales tab. Dynamic attributes are attributes that are not required for all variants, but may be beneficial to include for some. Dynamic attributes and their values appear on the product's page on the website. A pop-up window will appear, which will allow you to modifiy the dynamic attributes. (Note - a product type must first be set for the product before dynamic attributes will be available. To set the product type, see Dynamic Attributes.)

Variant List: This list box contains the list of variants defined for the product. The format of this list will vary depending upon the "Display Options" setting.

- **Show All**: If "Show All" is selected as the "Display Option", the variant list will contain one entry for each variant. The following columns will be displayed:
  - **Color**:   This column contains the color name of the variant.
  - **Size**: This column contains the size name of the variant.
  - **Price**: This column contains the price of the variant.
  - **Volume Pricing**: This column contains information pricing if the variant uses volume pricing.
  - **DC Inventory**: This column contains the current inventory amount in the Distribution Center.
  - **Store Inventory**: This column contains the current inventory in stores for the variant.
  - **Edit**: Select "Edit" to modify a variant. See Variant Details for details.
  - **Active**: Select or deselect "Active" to activate or deactivate a variant. Inactive variants will not be available on the website.
  - **Remove**:   Select "Remove" to delete a variant.
- **Group by Size/Group by Color/Group All**: If "Group by Size", "Group by Color", or "Group All" is selected as the "Display Option", the variant list will have one entry for each group. The following columns will be displayed:
  - **Group**: This column contains the size name, if grouping by size, or color name, if grouping by color, of the group. If grouping by all, the column will contain "All Variants".
  - **Count**: This column contains the number of variants in the group.
  - **Backorder Status**: This column contains information on the back-orderable status of the variants in the group.
  - **Pre-Order Status**: This column contains information on the pre-orderable status of the variants in the group.
  - **Activation Status**: This column contains information on the active status of the variants in the group.
  - **View All**: Select "View All" to view a list of each individual variant in the group. See Variants for Variant Group for details.
  - **Edit**: Select "Edit" to make changes that will be applied to each variant in the group (see Edit Variant Groups for details).

Articles in this section

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Home > Site Manager by the Section > Product Catalog > Products > Variants > Variant Details

Variant Details

The Variant Details page allows you to modify information for a specific variant. The Variant Detail page is reached by editing a variant on the Variants tab, or by creating a new variant.

Back to All Variants: Select this link to return to the Variants tab.

Active: Select or deselect this checkbox to enable or disable the variant. Disabled variants will not appear on the web site.

Variant Information: This summary box contains the details for the variant.

- **Variant ID**: This read only field contains the internal identifier of the variant.
- **SKU**: This text entry field contains the SKU number for the variant. This is a required field.
- **UPC**: This text entry field contains the UPC code for the variant.
- **Start Date**: This calendar field contains the start date for the variant. Enter the start date in this field or use the calendar control to select the start date. The current date must be later than the start date for the variant to appear on the website. Variants with no start date appear immediately on the web site.
- **Start Time**: This time field contains the start time for the variant. Enter the start time in this field or use the clock control to select a time. The current time must be later than the start time and the current date must be equal to or later than the start date for the variant to appear on the web site. Variants with no start time will appear on the web site after midnight on the start date.
- **End Date**: This calendar field contains the end date for the variant. Enter the end date in this field or use the calendar control to select the end date. The current date must be earlier or equal to the end date for the variant to appear on the website. Variants will not appear on the website after their end date has passed. A variant with no end date will always appear on the website.
- **End Time**: This time field contains the end time for the variant. Enter the end time in this field or use the clock control to select the end time. The current time must be earlier than the end time and the current date must be earlier than or equal to the end date for the variant to appear on the website. Variants with no end time but an end date will stop appearing on the website after midnight on the end date.
- **Color Name**: This text entry field contains the name of the color of the variant.
- **Color Code**: This text entry field contains the code for the color of the variant.
- **Size Name**: This text entry field contains the name of the variant's size.
- **Size Code**: This text entry field contains the code for the variant's size.
- **Pricing Group Code**: This text entry field contains the code for the pricing group the variant is part of.
- **Can Be Taxed**: This checkbox indicates whether or not the purchase price of this variant can be taxed.

Inventory: This summary box contains information on the amount of the variant that is available. What is displayed in this box will vary based on what is chosen in the Inventory Type drop-down list box.

- **Inventory Type:** This drop-down list box contains a list of the different ways in which inventory for the variant can be managed. The content of this drop-down list box is affected by the options set on the Configurations tab for the site. Selection of a specific inventory type modifies the fields available in the rest of the summary box.
  - **Availability Based on Inventory Levels, Not Backorderable:** Selection of this inventory type means that the variant is available as long as the inventory level is greater than zero. The variant will not be backorderable. The following fields will be displayed with this option:
    - **Current Inventory Level**: This field contains the amount of the variant that is in inventory.
    - **DC Reserved Inventory**: This field contains the amount of the variant that the Distribution Center is processing for shipment.
    - **Not Available Quantity Threshold**: This field contains the lowest level that inventory can drop to before the variant will no longer be considered available for sale.
    - **DC Inventory Available to Sell**: This field contains the amount of inventory that can be sold and shipped. This amount is calculated as follows: Current Inventory Level - DC Reserved Inventory - Not Available Quantity Threshold. When this amount becomes zero, the variant will no longer be available for purchase.
  - **Availability Based on Inventory Levels, Backorderable:** Selection of this inventory type means the variant is available as long as there is inventory and can be backordered once there is no more inventory. The following fields will be displayed with this option:
    - **Current Inventory Level**: This field contains the amount of the variant that is in inventory.
    - **DC Reserved Inventory**: This field contains the amount of the variant that is to be kept on reserve in the Distribution Center.
    - **Not Available Quantity Threshold**: This field contains the lowest level that inventory can drop to before the variant will no longer be considered available for sale.
    - **DC Inventory Available to Sell**: This field contains the amount of inventory that can be sold and shipped. This amount is calculated as follows: (Current Inventory Level - DC Reserved Inventory - Not Available Quantity Threshold) + Quantity Available for Backorder. When this amount becomes zero, any additional variants purchased will be placed on backorder.
    - **Quantity Available for Backorder**: This field contains the number of variants that can be purchased and placed on backorder.
    - **DC Inventory on Backorder**: This field contains the number of variants in the Distribution Center that are on backorder and are waiting for fulfillment.
    - **Expected Ship Date for Backordered Items**: This field contains the date backordered items are next expected to ship on.

  - **On Pre-order:** Selection of this inventory type means the variant is available on pre-order. The following fields will be displayed with this option:
    - **Current Inventory Level**: This field contains the amount of the variant that is in inventory.
    - **Not Available Quantity Threshold**: This field contains the lowest level that inventory can drop to before the variant will no longer be considered available for sale.
    - **DC Inventory Available to Sell**: This field contains the amount of inventory that can be sold and shipped. This amount is calculated as follows: (Current Inventory Level - DC Reserved Inventory - Not Available Quantity Threshold) + Quantity Available for Preorder. When this amount becomes zero, any additional variants will not be available for sale.
    - **Quantity Available for Preorder**: This field contains the number of variants that can be purchased and placed on pre-order.
    - **Expected Ship Date for Pre-ordered Items**:This field contains the date pre-ordered items are next expected to ship on.
  - **Stock Is Always Available:** Selection of this inventory type means the variant will always be available for sale. No additional fields are displayed when this option is selected.

Store Options: This summary box contains information on the variant's availability in stores. This summary box is available only when the site is integrated with the Locate system.

- **Total Store Inventory:** This text field indicates the total amount of inventory for the variant that is available in stores.
- **Allow Store Pickup:** This checkbox determines whether or not this variant can be purchased as in in-store pickup item. If it the checkbox is not selected, the variant must be fulfilled via mail delivery.
- **Display limited quantity message when store inventory less than:** This text field is only available when "Allow Store Pickup" is selected. This text field contains an inventory number that indicates the lowest inventory amount for the variant before a "limited quantity" message is displayed. If the actual inventory for the variant is lower than this amount, the message will be displayed on the product detail page.
- **Set variant not available when store inventory is less than:** This text field is only available when "Allow Store Pickup" is selected. This text field contains an inventory number that indicates the lowest inventory amount for the variant before it can no longer be purchased. When the inventory for the variant falls below this amount, the customer will not be able to purchase the variant.

Variant Group: This summary box contains variant group information if the variant is part of a variant group.

- **Name:** This text entry field contains the name of the variant group that the variant is part of. Variant groups can be used in experiences to distinguish between different groups of users.

Source-Based Pricing: This summary box contains the price(s) of the variant.

- **Display Options**: The information displayed in the source list will vary based on the display option selected.
  - **Only sources with pricing for this SKU**: The only sources listed will be ones that have supplies for this variant.
  - **All sources**: Every source will be listed, regardless of whether or not it is associated with the variant.
- **Source List**: This list contains available sources. The sources displayed are controlled through the "Display Options" selection.
  - **Source**: This column contains the name of the source.
  - **Quantity**: This column contains the quantity available from the source.
  - **Original Price**: This column contains the original price of the variant from the source.
  - **Price**: This column contains the current price of the variant from the source.
  - **Start Date**: This column contains the first date the source is available for the variant.
  - **End Date**: This column contains the last date the source is available for the variant.
  - **Edit**: Select this icon to edit the source for the variant. The Source-Based Price pop-up window will appear. Edit the values in that window as needed and select "Submit" to save the changes. You can only edit sources that have prices for the variant.
  - **Active**: Select or deselect this column to activate/deactivate the source. Inactive sources will not be available for use. You can only activate/deactivate sources that have pricing for the variant.
- **Add New Pricing**: Select this button to add a new pricing source to the variant. The Source-Based Price pop-up window will appear. Fill in the values in that window and select "Submit" to add a new source-based price to this variant.

See also

Create New Variant
Edit Variant Groups
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Create New Variant

The Create New Variant page allows you to create a new variant and add it to an existing product. This page appears after selecting the "Create New Variant" button on the Variants tab. The "Create New Variant" button is only available when editing the master version of a product.

Back to All Variants: Select this link to return to the Variants tab.

Active: Select or deselect this checkbox to enable or disable the new variant. Disabled variants will not appear on the web site.

Variant Information: This summary box contains the details for the variant.

- **SKU**: This text entry field contains the SKU number for the variant. This is a required field.
- **UPC**: This text entry field contains the UPC code for the variant.
- **Start Date**: This calendar field contains the start date for the variant. Enter the start date in this field or use the calendar control to select the start date. The current date must be later than the start date for the variant to appear on the website. Variants with no start date appear immediately on the web site.
- **Start Time**: This time field contains the start time for the variant. Enter the start time in this field or use the clock control to select a time. The current time must be later than the start time and the current date must be equal to or later than the start date for the variant to appear on the web site. Variants with no start time will appear on the web site after midnight on the start date.
- **End Date**: This calendar field contains the end date for the variant. Enter the end date in this field or use the calendar control to select the end date. The current date must be earlier or equal to the end date for the variant to appear on the website. Variants will not appear on the website after their end date has passed. A variant with no end date will always appear on the website.
- **End Time**: This time field contains the end time for the variant. Enter the end time in this field or use the clock control to select the end time. The current time must be earlier than the end time and the current date must be earlier than or equal to the end date for the variant to appear on the website. Variants with no end time but an end date will stop appearing on the website after midnight on the end date.
- **Color Name**: This text entry field contains the name of the color of the variant.
- **Color Code**: This text entry field contains the code for the color of the variant.
- **Size Name**: This text entry field contains the name of the variant's size.
- **Size Code**: This text entry field contains the code for the variant's size.
- **Pricing Group Code**: This text entry field contains the code for the pricing group the variant is part of.
- **Can Be Taxed**: This checkbox indicates whether or not the purchase price of this variant can be taxed.

Inventory: This summary box contains information on the amount of the variant that is available. What is displayed in this box will vary based on what is chosen in the Inventory Type drop-down list box.

- **Inventory Type:** This drop-down list box contains a list of the different ways in which inventory for the variant can be managed. The content of this drop-down list box is affected by the options set on the Configurations tab for the site. Selection of a specific inventory type modifies the fields available in the rest of the summary box.
  - **Availability Based on Inventory Levels, Not Backorderable:** Selection of this inventory type means that the variant is available as long as the inventory level is greater than zero. The variant will not be backorderable. The following fields will be displayed with this option:
    - **Current Inventory Level**: This field contains the amount of the variant that is in inventory.
    - **Not Available Quantity Threshold**: This field contains the lowest level that inventory can drop to before the variant will no longer be considered available for sale.
  - **Availability Based on Inventory Levels, Backorderable:** Selection of this inventory type means the variant is available as long as there is inventory and can be backordered once there is no more inventory. The following fields will be displayed with this option:
    - **Current Inventory Level**: This field contains the amount of the variant that is in inventory.
    - **Not Available Quantity Threshold**: This field contains the lowest level that inventory can drop to before the variant will no longer be considered available for sale.
    - **Quantity Available for Backorder**: This field contains the number of variants that can be purchased and placed on backorder.
    - **Expected Ship Date for Backordered Items**: This field contains the date backordered items are next expected to ship on.
  - **On Pre-order:** Selection of this inventory type means the variant is available on pre-order. The following fields will be displayed with this option:
    - **Current Inventory Level**: This field contains the amount of the variant that is in inventory.
    - **Not Available Quantity Threshold**: This field contains the lowest level that inventory can drop to before the variant will no longer be considered available for sale.
    - **Quantity Available for Preorder**: This field contains the number of variants that can be purchased and placed on pre-order.
    - **Expected Ship Date for Pre-ordered Items**:This field contains the date pre-ordered items are next expected to ship on.
  - **Stock Is Always Available:** Selection of this inventory type means the variant will always be available for sale. No additional fields are displayed when this option is selected.

Store Options: This summary box contains information on the variant's availability in stores. This summary box is available only when the site is integrated with the Locate system. This area does not appear until after the initial information for the new variant is saved.

- **Total Store Inventory:** This text field indicates the total amount of inventory for the variant that is available in stores.
- **Allow Store Pickup:** This checkbox determines whether or not this variant can be purchased as in in-store pickup item. If it the checkbox is not selected, the variant must be fulfilled via mail delivery.
- **Display limited quantity message when store inventory less than:** This text field is only available when "Allow Store Pickup" is selected. This text field contains an inventory number that indicates the lowest inventory amount for the variant before a "limited quantity" message is displayed. If the actual inventory for the variant is lower than this amount, the message will be displayed on the product detail page.
- **Set variant not available when store inventory is less than:** This text field is only available when "Allow Store Pickup" is selected. This text field contains an inventory number that indicates the lowest inventory amount for the variant before it can no longer be purchased. When the inventory for the variant falls below this amount, the customer will not be able to purchase the variant.

Variant Group: This summary box contains variant group information if the variant is part of a variant group.

- **Name:** This text entry field contains the name of the variant group that the variant is part of. Variant groups can be used in experiences to distinguish between different groups of users.

Source-Based Pricing: This summary box contains the price(s) of the variant. This area does not appear until after the initial information for the variant is saved.

- **Display Options**: The information displayed in the source list will vary based on the display option selected.
  - **Only sources with pricing for this SKU**: The only sources listed will be ones that have supplies for this variant.
  - **All sources**: Every source will be listed, regardless of whether or not it is associated with the variant.
- **Source List**: This list contains available sources. The sources displayed are controlled through the "Display Options" selection.
  - **Source**: This column contains the name of the source.
  - **Quantity**: This column contains the quantity available from the source.
  - **Original Price**: This column contains the original price of the variant from the source.
  - **Price**: This column contains the current price of the variant from the source.
  - **Start Date**: This column contains the first date the source is available for the variant.
  - **End Date**: This column contains the last date the source is available for the variant.
  - **Edit**: Select this icon to edit the source for the variant. The Source-Based Price pop-up window will appear. Edit the values in that window as needed and select "Submit" to save the changes. You can only edit sources that have prices for the variant.
  - **Active**: Select or deselect this column to activate/deactivate the source. Inactive sources will not be available for use. You can only activate/deactivate sources that have pricing for the variant.
- **Add New Pricing**: Select this button to add a new pricing source to the variant. The Source-Based Price pop-up window will appear. Fill in the values in that window and select "Submit" to add a new source-based price to this variant.

Save Variant: Select this button to save new variant. The Source-Based Price window will appear. Enter information for a source and price, and select "Submit". The Source-Based Price window dismisses, and the Source-Based Pricing and Store Options sections appear. If desired, enter Store Options information then select the Save Variant button. Select "Back to All Variants" to return to the Variants tab. The new variant will be included in the list on the tab.

See also

Variant Details
Edit Variant Groups
Variants for Variant Group
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Edit Variant Groups

The Edit Variant Group area appears on the Variants tab by grouping the variants according to one of the display group options, and then selecting Edit icon for one of the groups. The changes made in the Edit Variant Group area will apply to every variant in the selected group.

Activation Status: This field indicates whether or not all of the variants in the variant group are active.

- **Active**: This selection indicates that all of the variants in the variant group are active.
- **Inactive**: This selection indicates that none of the variants in the variant group are active.

Start Date: This calendar field indicates the first date that the variants in the variant group can appear on the web site. Enter the date in the entry fields or use the calendar control to select a date.

End Date: This calendar field indicates the last date that the variants in the variant group can appear on the web site. Enter the date in the entry fields or use the calendar control to select a date.

Size Name: This field contains the name of the size of the variant group.

Size Code: This field contains the size code of the variant group.

Pricing Group Code: This text entry field contains the code for the pricing group the variant is part of.

Taxable Status: This field contains the taxable status of the variant group. The selections are:

- **Can Be Taxed**: If this is selected, the variants in the group can be taxed.
- **Cannot Be Taxed**: If this is selected, the variants in the group cannot be taxed.

Store Pickup Status: This field contains the store pickup status for the variant group. The selections are:

- **Allow Store Pickup**: If this is selected, store pick-up options will be available for the variants in the group.
- **Disallow Store Pickup**: If this is selected, store pick-up options will not be available for the variants in the group.

Promo Group Code: This text entry field contains the promo group code used for the variant group.

Inventory Type: This field contains the manner in which inventory is managed for the variants in the group. Additional option may appear under this field based on the option chosen. The available options are:

- **Availability Based on Inventory Levels, not Backorderable**: If this option is chosen, the variants will be available as long as their inventory levels are sufficient. Once inventory is too low, the variants will not be available for sale.
- **Availability Based on Inventory Levels, Backorderable**: If this option is chosen, the variants will be available as long as their inventory levels are sufficient. Once inventory is too low for sale, the variants can still be purchased and placed on backorder. The following field is displayed with this selection:
    - **Expected Ship Date for Backordered Items**: This field sets an expected shipment date for any backordered items.
- **Stock is Always Available**: If this option is chosen, the variants are always available for purchase.
- **On Preorder**: If this option is chosen, the variants can be purchased on a pre-order basis. When this option is selected, the following field is available:
    - **Expected Ship Date for Preordered Items**: This field sets an expected shipment date for the pre-ordered items.

Swatch Image: This box will only be available if the variants were grouped by color. This summary box contains the swatch image used for all of the variants in the variant group.

- **Add Image**: This button will only be available if the variants were grouped by color and there is not a swatch image currently selected for the variant group. Select this button to add a swatch image to the selected group. The image browser will appear. Browse to the image you want and double-click it. The image browser will disappear and the selected image will be used for the swatch image.
- **Remove**: This button will only be available if the variants were grouped by color and there is a swatch image currently selected for the variant group. Select this button to remove the swatch image.

Recolored Image: This box will only be available if the variants were grouped by color. This summary box contains the recolored image used for all of the variants in the variant group.

- **Add Image**: This button will only be available if the variants were grouped by color and there is not a recolored image currently selected for the variant group. Select this button to add a recolored image to the selected group. The image browser will appear. Browse to the image you want and double-click it. The image browser will disappear and the selected image will be used for the recolored image.
- **Remove**: This button will only be available if the variants were grouped by color and there is a recolored image currently selected for the variant group. Select this button to remove the recolored image.

Update Variant Group: Select this button to save the modifications made to the variant group. No modifications will be saved until this button is selected.

See also

Variant Details
Create New Variant
Variants for Variant Group
Source-Based Price

Home > Site Manager by the Section > Product Catalog > Products > Variants > Variants for Variant Group

Variants for Variant Group

The Variants for Variants Group page appears when "View All" is selected on a group on the Variants page. This page contains a list of all of the variants in the variant group selected on the Variants page.

Variant List: The variant list contains the following columns:

- **SKU**: This column contains the SKU of each variant.
- **Size**: This column contains the size of each variant.
- **Color**: This column contains the color of each variant.
- **Order**: This column is used to change the order of the variant within the variant group. Select the "up" arrow to move the variant higher, select the "down" arrow to move the variant lower.
- **Edit**: Select the Edit icon for any variant to edit the variant. The Variant Details page will appear.
- **Active**: Select or deselect this checkbox to activate or deactivate the variant. Inactive variants will not be available on the website.
- **Delete**: Select this icon to delete a variant.

See also

Variant Details
Create New Variant
Edit Variant Groups
Source-Based Price

Home > Site Manager by the Section > Product Catalog > Products > Variants > Source-Based Price

Source-Based Price

This pop-up window is used to add a new source-based price to a variant. The window appears by selecting "Add New Pricing" or "edit" on the Variant Details tab. Fill in the fields in this window and select "Submit" to add or save changes to the source-based price.

- **Product Variant ID**: This field contains the internal identifier of the product variant. This field is not editable.
- **Source**: Use this drop-down to select the source to be used for the new pricing.
- **Pricing Activation Status**: Select the "Active" checkbox to make the source-based price active as soon as it is available. If this checkbox is deselected, the source-based price will need to be manually activated at a later point in time.
- **Quantity**: Enter the number of units that are available using this source and price.
- **Original Price**: Enter the original price of the variant from this source.
- **Price**: Enter the current price of the variant from this source.
- **Start Date**: Enter or select the first date that this source-based price will be available for the variant. If a date is not entered, the price will be available immediately.
- **Start Time**: Enter or select the time on the start date that the source-based price will be available for the variant. If a time is not entered, the price will be available starting at midnight. A time should not be entered if a date is not entered.
- **End Date**: Enter or select the last date the source-based price will be available for the variant. If a date is not entered, the price will be available until it is manually deactivated.
- **End Time**: Enter or select the time on the last date that the source-based price will become unavailable. If a time is not entered, the price will be unavailable after midnight on the end date. A time should not be entered if a date is not entered.
- **Submit**: Select this button to save the values entered and add the source-based price to the variant.
- **Cancel**: Select this button to cancel the modifications made on the screen.

See also

Variant Details
Create New Variant
Edit Variant Groups
Variants for Variant Group

Files

The Files tab allows you to attach files to the current product. The content of the files will be displayed on the website on the product detail page for the product, in a separate tab at the bottom.

Add Product File: Selecting this button will allow you to add a file to the product. The page will refresh and you will find fields that allows you to select the file type, indicate the file name, and select a name for the file to be used on the product detail page.

File List: A list of the files associated with the product will be displayed in the lower portion of the page. The properties of a file can be modified by selecting the "Edit" icon. A file can be activated or deactivated by selecting or deselecting the "Active" checkbox. Inactive files will not be available on the product detail page. Files may be removed by selecting the "Remove" icon.

See also

Find a Product
Create a Product
Record Summary
Attributes
Images
Videos
Metadata
Merchandising
Variants
Dynamic Attributes
Categories
Locales

Dynamic Attributes

The Dynamic Attributes tab allows you to manage dynamic attributes for the product. This tab is not available on international sites. For international sites, dynamic attributes are maintained on the Locales tab.

Dynamic attributes are attributes that are not required for all products, but may be beneficial to include for some. The selection of dynamic attributes that are available to the product is controlled through the product type selected for the product. Dynamic attributes and their values appear on the product's page on the website.

For additional information on using dynamic attributes and product types, see Creating Dynamic Attributes. To set values for dynamic attributes at the SKU level, see Variants.

Set Product Type: This drop-down list box contains the set of product types that have been defined for the website. Select the one that applies to the current product.

Attributes: Groups of attributes are available after a product type has been selected. The attributes shown are based on the attribute groups that are associated with the selected product type. Values can be entered for each attribute.

- **Attribute Name**: This text field contains the name of the attribute.
- **Value**: This entry field is where the value for the attribute is entered. An asterisk (*) at the beginning of this field indicates a value is required.
- **Value for Sorting**: This field is available for some attributes, but not all. When available, you can enter a numeric value that will indicate the order that each attribute will be shown in on the website. The lower the number, the earlier the attribute will be shown in the list of attributes.

Save: Select this button to save the product type selection. Modifications on this page will not be saved unless this button is selected.

See also

Find a Product
Create a Product
Record Summary
Attributes
Images
Videos
Metadata
Merchandising
Variants
Files
Categories
Locales

Home > Site Manager by the Section > Product Catalog > Products > Categories

Categories

The Categories tab allows you to manage the categories the product is associated with.

Add Category: This button allows you to select a new category to add the product to. A pop-up window will appear and you can navigate to the desired category in it.

Delete Selected Category: This buttons allows you to remove a product from a category. Select the category or categories by selecting their "Batch" checkbox, then select this button.

Category List: The list of categories the product is included in is shown on the lower portion of the page. Categories may be activated or deactivated by selecting or deslecting the "Active" checkbox. Deactivating a category will keep the product in the category, but it will not appear on the website in that category. Products may be removed from a category by selecting the "Delete" icon for the category.

See also

Find a Product
Create a Product
Record Summary
Attributes
Images
Videos
Metadata
Merchandising
Variants
Files
Dynamic Attributes
Locales

Home > Site Manager by the Section > Product Catalog > Products > Locales

Locales

The Locales tab allows you to manage various attributes of the product for the different locales defined for the site. Dynamic atttributes for products are also maintained on this tab. This tab is available only for international sites.

Each table on this tab allows you to maintain a different set of attributes for the product. Within the tables is a list of the locales available for the site. To customize the attributes of the product for a locale, select the edit icon to the right of the locale.

Set Product Type: Use this drop-down list box to select the product type of the product. Groups of attributes are available at the bottom of the page after a product type has been selected. The attributes shown are based on the attribute groups that are associated with the selected product type. Values can be entered for each attribute.

Product Attributes: Edit a locale in this list to tailor product attributes for the locale. See Product Attributes by Locale for additional information.

Product Price Attributes: Edit a locale in this list to tailor the price of the product for the locale. See Product Price by Locale for additional information.

Product Variant Attributes: Edit a locale in this list to tailor the attributes of the product by variant. See Product Variant by Locale for additional information.

Articles in this section

Product Attributes by Locale
Product Price by Locale
Product Variant by Locale

See also

Find a Product
Create a Product
Record Summary
Attributes
Images
Videos
Metadata
Merchandising
Variants
Files
Dynamic Attributes
Categories

Home > Site Manager by the Section > Product Catalog > Products > Locales > Product Attributes by Locale

Product Attributes by Locale

The Product Attribute by Locale page allows you customize certain product attributes for the selected locale.

Attribute Group Summary: This non-editable summary box contains information on the selected locale.

- **Name**: The name of the attributes that are being edited.
- **Language**: The language of the locale.
- **Country:** The country/countries the locale is valid for.
- **Currency**: The currency/currencies used in the locale.

Editing Product Attributes for : This summary box contains the product attributes that you can modify for the locale.

- **Product Name**: The name of the product.
- **Product Template**: The template used to display the product page of the product on the web site.
- **Description**: The description of the product.
- **More Information Content**: The information contained in the "More Information" section of the product's page.
- **Image ALT Name**: The alternate name of the image used for the product. The alternate name is displayed if the image is not available.
- **Meta Description**: The meta description of the product. This is the description that is made available to external search engines.
- **Meta Keywords**: The meta keywords of the product. These are the keywords that are made available to external search engines. Meta keywords will appear in the source of the page for the product.
- **On-Site Search Keywords**: The search keywords that this product will be considered a match for when a search is executed on the web site.

Save Updates: Select the button to save the modifications made on this page. No changes will saved until this button is selected.

See also

Product Price by Locale
Product Variant by Locale

Home > Site Manager by the Section > Product Catalog > Products > Locales > Product Price by Locale

Product Price by Locale

The Product Price by Locale page allows you to adjust the price of a product for a specific locale.

Attribute Group Summary: This non-editable summary box contains information on the selected locale.

- **Name**: The name of the attributes that are being edited.
- **Language**: The language of the locale.
- **Country:** The country/countries the locale is valid for.
- **Currency**: The currency/currencies used in the locale

Editing Product Price Attributes for : This summary box contains the pricing information for the product for the selected locale.

- **Display Price**: This non-editable text field contains the display price for the product.
- **MSRP**: This text entry field contains the Manufacturer's Suggested Retail Price for the product.

Save Updates: Select this button to save the modifications made on this page. No modifications will be saved until this button is selected.

See also

Product Attributes by Locale
Product Variant by Locale

Product Variant by Locale

The Product Variant by Locale page allows you to customize aspects of variants of the product for a specific locale.

Display Options: This group of radio buttons allows you to modify the way the variants are displayed in the variant list.

- **Show All**: Select this button to show each variant individually.
- **Group by Size**: Select this button to group the variants by size and show each size group.
- **Group by Color**: Select this button to group the variants by color and show each color group.

Variant List: This list box contains as list of all of the variants, grouped according to the selection chosen as the display option. Select the edit icon to the right of any variant or variant group to make modifications to it.

Product Variant Group Summary: This summary box contains information on the variant or variant group that was selected for editing. This summary box will only appear after a variant or variant group has been selected. The fields in this box are non-editable.

- **Product Variant ID**: This field is displayed only when a single variant has been selected for editing. The field contains the internal identifier of the product variant.
- **SKU**: This field is displayed only when a single variant has been selected for editing. The field contains the SKU of the product variant.
- **Color Code**: This field is displayed only when a single variant has been selected for editing. The field contains the color code of the product variant.
- **Size Code**: This field is displayed only when a single variant has been selected for editing. The field contains the size code of the product variant.
- **Variant Group**: This field is displayed only when a variant group has been selected for editing. The field contains identifying information on the group that is being edited. If the variants were grouped by size, this field will contain the size being edited. If the variants were grouped by color, this field will contain the color being edited.
- **Variant Size**:
- **Variant Ids**: This field is displayed only when a variant group has been selected for editing. The field contains the list of internal variant identifiers of all of the variants in the group.

Attribute Group Summary: This non-editable summary box contains information on the selected locale. This summary appears only when a variant or variant group is selected for editing.

- **Name**: The name of the attributes that are being edited.
- **Language**: The language of the locale.
- **Country:** The country/countries the locale is valid for.
- **Currency**: The currency/currencies used in the locale.

Editing Product Variant Attributes for : This summary box contains the product variant attributes that can be modifed for the selected variant or variant group. The items in this summary box will vary based on what was selected for editing.

- **Color Name**: This text entry field is available only when a single variant or a variant group based on color has been selected for editing. The field contains the name of the color of the variant.
- **Size Name**: This text entry field is available only when a single variant or a variant group based on size has been selected for editing. The field contains the name of the size of the variant.
- **Can be Taxed**: This text entry field is available only when a single variant has been selected for editing. Select or deselect this checkbox if the variant can be taxed for this locale.

See also

Product Attributes by Locale
Product Price by Locale

Home > Site Manager by the Section > Product Catalog > Ensembles

Ensembles

Use this page to manage the ensembles defined in the site's catalog. You can add, delete, and edit ensembles. On this page you will find information that will help you to:

- find an ensemble
- activate an ensemble
- deactivate an ensemble
- view ensemble thumbnails
- delete an ensemble
- change an ensemble's workflow status
- add a comment to an ensemble
- view the changes made to an ensemble
- create an ensemble
- edit an ensemble
- preview an ensemble
- create a new order and add an ensemble to it
- customize an ensemble for a locale (international sites only)

To find an ensemble:

1. Select the "Find an Ensemble" tab.
2. Enter a search term in the "Search Term" text box. This can be a keyword, an ensemble name, a product style number, or a category ID.
3. Use the "Search By" dropdown list-box to the search method to use.
4. Select "Find". A list of all the matches will appear below.

To activate an ensemble:

1. Find the ensemble you wish to activate.
2. Check the "Activate" check box to the right of the ensemble name.

To deactivate an ensemble:

1. Find the ensemble you wish to deactivate.
2. Uncheck the "Activate" check box to the right of the ensemble name.

To view thumbnails of ensemble images:

1. Find the ensemble(s) whose images you want to view.
2. Hover your mouse over the "Thumbnails" icon for each ensemble. The thumbnail will be displayed in a pop-up window.
3. To view thumbnails for all the ensembles at once, select the "Show Thumbnails" check box. The thumbnails will be displayed in the "Thumbnails" column.

To delete an ensemble:

1. Find the ensemble you wish to delete.
2. Select the "Delete" icon to the right of the ensemble name.

To change the workflow status of an ensemble:

1. Find the ensemble whose status you wish to change.
2. Select the "Ensemble Name" or the "Edit" icon to the right of the ensemble name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Related Items", "Products", and "Categories". A "Locales" tab will also be available if the site is an international site.
3. At the top of the page is a workflow status section that describes the current status of the ensemble. You may only change the status of a staged version of the ensemble.
4. Select the drop-down list box to expand it and see the statuses that you have permission to set the ensemble to.
5. Select the desired status.
6. If the ensemble is being scheduled for release to the website, the date and time when the ensemble will be available may be entered in the "Release Date" fields.
7. Select "Save".

To attach a comment to an ensemble:

1. Find the ensemble you wish to edit.
2. Select the "Ensemble Name" or the "Edit" icon to the right of the ensemble name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Related Items", "Products", and "Categories". A "Locales" tab will also be available if the site is an international site.
3. Select "Attach Comment". A new window will appear.
4. In the window, enter your comment.
5. Select "Save & Close". The window will close.
6. The comment will appear in the "Record Summary" tab for the ensemble.

7. Select "Back to Find Ensembles" to return to the previous page.

To view the changes made to an ensemble:

1. Find the ensemble you wish to review.
2. Select the "Ensemble Name" or the "Edit" icon to the right of the ensemble name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Related Items", "Products", and "Categories". A "Locales" tab will also be available if the site is an international site.
3. The "Record Summary" tab contains information on all the changes made to the ensemble.
4. Use the "Audit Trail & User Comments" list box to view a list of the users who have made changes to the ensemble.
5. Use the "Staged Changes: Variations from Master Record" list box to view a list of the changes that have been made to the ensemble. Select "Edit" to the left of any change to move to the tab the change was made in.
6. Reports that are available are listed in the "Run Report" drop-down list box. To run a report, select the report and then select "Go".

To create an ensemble:

1. Select the "Create an Ensemble" tab.
2. Enter a name for the ensemble.
3. Select "Create Ensemble". A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Related Items", "Products", and "Categories". A "Locales" tab will also be available if the site is an international site.
4. At the top of the page is a workflow status box that displays the current status of the ensemble. New ensembles are given a status of "New". Ensembles with a status of "New", however, cannot be edited. The status must be changed in order to add additional information about the ensemble.
   - Select the workflow status drop-down list box.
   - Select the "Work in Progress (WIP)" status. The status area will redraw and expand.
   - Select the "Save" button to save the new status.
5. Select the "Attributes" tab and fill in the attributes for the ensemble. Many of the fields on this tab are self-explanatory. Information is provided below for selected fields:
   - Select or deselect the "Active" checkbox to make the ensemble active or inactive. Inactive ensembles do not appear on the website.
   - HTML tags can be used in the ensemble name if desired.
   - Change the start and end date and time for the ensemble as desired. If the start date is left blank, the ensemble will start immediately. If the end date is left blank, the ensemble will run indefinitely and will need to be deactivated by hand at a later date.
   - An "Ensemble Template" is used to customize the way an ensemble will appear on the website. Select the ensemble template to be used for this ensemble. If a template is not selected, the ensemble will appear according to the template defined for the category it appears in, or according to the default rules for the website.

   Select "Save Attributes" to save your changes.
6. Select the "Images" tab and fill in the images for the ensemble.
   - Select the "Add Image" button to browse to the image to be added. The image browser will appear and fill in the tab. Use the folder tree on the left hand side of the image browser to locate the folder the image is in. Once the image has been located, double-click it to add it to the ensemble. The image browser will dismiss and the selected image will appear in the "Current Ensemble Images" section of the tab. Repeat this step for each image for the ensemble.
   - Alternative names are used by assistive screen readers and search engine spiders to identify the ensemble. To change the alternate name chosen for the ensemble, enter a new alternative name in the "ALT name" field. Select "Update" to save the change. Select "Restore Original" to restore the alternate name to the original alternative name created for the ensemble.
   - In the "Current Ensemble Images" section, select "Primary Image" for the primary image for the Ensemble. This will be the main image displayed on the website.
   - Deselect "Active" for any image that should not appear on the website.
7. Select the "Metadata" tab and enter the Search Engine Optimization (SEO) terms along with site search terms for the ensemble. SEO terms are the terms that will be made available to internet search engines for the ensemble. Site search terms are the terms that the ensemble will be considered a match for when a user conducts a search using them. Select "Save Metadata" to save your changes.
8. Select the "Related Items" tab and select the related items for the ensemble. Related items are the items that will appear on the ensemble details page for this ensemble.
   - Select the type of relationship you want to work with in the "Category" drop-down.
   - Select the products and/or ensembles that should be related to the ensemble with the "Add Product" and "Add Ensemble" buttons.
   - Order the products you added by clicking and dragging them in the list. The order in the list indicates the order that they should appear in on the ensemble detail page. While there is a limit to the number of related items that will appear on the ensembles detail page, items farther down on the list may appear if some of the top items are out of stock.
   - Select the "Active" checkbox to make the item active, deselect the "Active" checkbox to make the item inactive. Only active items will appear on the ensemble details page.
9. Select the "Products" tab and fill in the products that are part of the ensemble.
   - Select the "Add Product" button to add a product to the ensemble. A new window will appear and you will be able to search for products in that window. To add a product in that window to the ensemble, select the "Select" box for the product. The product will be added to the list of products on the "Products" tab. The product will also be removed from the list showing in the new window. Close the window when you have selected all the products that are in the ensemble.
   - Select the "Active" checkbox to activate each item in the ensemble.
   - To order the items in the ensemble, select and drag each product in the list. The order of the products will be reflected in the order the products are shown in on the ensemble details page.
10. Select the "Categories" tab to add the ensemble to a category.
    - Select "Add Category" to choose the category the ensemble will appear in. A new window will pop-up.

- Use the controls in the new window to navigate to the category.
- Select the category. The category will appear in the "Categories" tab, along with a message stating the ensemble has been added to the category.
- Continue selecting categories until all the categories the ensemble should appear in have been chosen.
- Close the category selecting window.
- In the "Categories" tab, activate each category the ensmble should begin appearing in.

11. If the site is an international site, select the "Locales" tab to customize attributes of the ensemble for each available locale.
    - Select the edit icon of a locale in the "Ensemble Attributes" list to modify the ensemble's name, description, template, image ALT name, meta description, meta keywords, or site search keywords for the locale. See Ensemble Attributes by Locale for additional information. Repeat this step for each locale.
    - Select the edit icon of a locale in the "Ensemble Price Attributes" list to modify the Manufacturer's Suggested Retail Price of the ensemble for the locale. See Ensemble Price by Locale for additional information. Repeat this step for each locale.
12. If you have sufficient privileges, you can modify the workflow status of the ensemble at the top of the page and indicate that the changes for the ensemble are complete. Set the status to the desired status. Ensembles must be set to "Approved" before they will be scheduled to appear on the site
13. Select "Back to Find Ensembles" to return to the previous page.

To edit an ensemble:

1. Find the ensemble you wish to edit.
2. Select the "Ensemble Name" or the "Edit" icon to the right of the ensemble name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Related Items", "Products", and "Categories".
3. Select the "Attributes" tab to modify the attributes for the ensemble. Select "Save Attributes" to save your changes.
4. Select the "Images" tab to modify the images or alternate name for the ensemble.
5. Select the "Metadata" tab to modify the metadata and site search terms for the ensemble. Metadata are the terms that will be made available to internet search engines for the ensemble. Site search terms are the terms that the ensemble will be considered a match for when a user conducts a search using those terms on the site. Select "Save" to save your changes.
6. Select the "Related Items" tab to modify the related items for the ensemble. Related items are the items that will appear on the ensemble details page for this ensemble.
    - Select the type of relationship you want to work with in the "Category" drop-down.
    - Add products and/or ensembles that should be related to the ensemble with the "Add Product" and "Add Ensemble" buttons.
    - Change the order of the products by clicking and dragging them in the list. The order in the list indicates the order that they should appear in on the ensemble detail page. While there is a limit to the number of related items that will appear on the ensembles detail page, items farther down on the list may appear if some of the top items are out of stock.
    - Select the "Active" checkbox to make the item active, deselect the "Active" checkbox to make the item inactive. Only active items will appear on the ensemble details page.
7. Select the "Products" tab to modify the products for the ensemble.
    - Select the "Add Product" button to add a product to the ensemble. A new window will appear and you will be able to search for products in that window. To add a product in that window to the ensemble, select the "Select" box for the product. The product will be added to the list of products on the "Products" tab. The product will also be removed from the list showing in the new window. Close the window when you have selected all the products that you want added to the ensemble.
    - Select the "Active" checkbox to activate an item in the ensemble. Deselect the "Active" checkbox to deactivate an item in the ensemble.
    - To change the order of the items in the ensemble, select and drag each product in the list. The order of the products will be reflected in the order the products are shown in on the ensemble details page.
    - Select the "Remove" icon to remove a product from the ensemble.
8. Select the "Categories" tab to modify the categories the ensemble is appearing in.
    - Select "Delete" next to any category the ensemble should no longer appear in.
    - Select "Add Category" to add the ensemble to a category.
9. If the site is an international site, select the "Locales" tab to modify attributes of the ensemble for one or more locales.
    - Select the edit icon of a locale in the "Ensemble Attributes" list to modify the ensemble's name, description, template, image ALT name, meta description, meta keywords, or site search keywords for the locale. See Ensemble Attributes by Locale for additional information. Repeat this step for each locale.
    - Select the edit icon of a locale in the "Ensemble Price Attributes" list to modify the Manufacturer's Suggested Retail Price of the ensemble for the locale. See Ensemble Price by Locale for additional information. Repeat this step for each locale.
10. Select the workflow status drop-down list box at the top of the page to change the workflow status.
11. Select "Back to Find Ensembles" to return to the previous page.

To preview an ensemble:

1. Find the ensemble you wish to preview.
2. Select the "Ensemble Name" or the "Edit" icon to the right of the ensemble name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Related Items", "Products", and "Categories". A "Locales " tab will also be available if the site is an international site.
3. Select the "Preview" button. A new instance of your browser will be brought up with a preview of the ensemble in it.
4. Close the browser instance when done previewing.
5. Select "Back to Find Ensembles" to return to the previous page.

To create a new order and add an ensemble to it (available only to users with the appropriate privileges):

1. Find the ensemble you wish to add to an order.
2. Select the "View" icon to the right of the ensemble. A dialog box will appear.

3. For each product in the ensemble that will be added to the order, enter the quantity of the product to be purchased in the "Quantity" text field.
4. Select "Add to Cart".
5. A confirmation box will appear asking if a new order should be started and the product(s) added to the order. Select "Yes".
6. The Site Manager screen will refresh and the Customer Service->New Order screen will be displayed. The selected product(s) will appear in the order.
7. For additional information on placing orders, see New Order.

To customize an ensemble for a locale (international sites only):

1. Find the ensemble you wish to customize.
2. Select the "Ensemble Name" or the "Edit" icon to the right of the ensemble name. A new page appears with tabs for "Record Summary", "Attributes", "Images", "Metadata", "Related Items", "Products", "Categories", and "Locales".
3. Select the "Locales" tab.
4. To customize an ensemble's name, description, template, image ALT name, meta description, meta keywords, or site search keywords, select the edit icon of a locale in the "Ensemble Attributes" list. The page will refresh and you will the items that you can modify. Make the necessary modifications, then select "Save Updates". See Ensemble Attributes by Locale for additional information. Repeat this step for each locale.
5. To customize an ensemble's Manufacturer's Suggested Retail Price, select the edit icon of a locale in the "Ensemble Price Attributes" list. Make the necessary modifications, then select "Save Updates". See Ensemble Price by Locale for additional information. Repeat this step for each locale.

Articles in this section

Find an Ensemble
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See also

Products
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Catalogs
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Global Product Updates
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Home > Site Manager by the Section > Product Catalog > Ensembles > Find an Ensemble

Find an Ensemble

The Find an Ensemble tab allows you to find an ensemble. For general information on working with ensembles, see the Ensembles page.

Search Term: Enter a term that will be used to identify the ensemble you are searching for.

Search By: Use this drop-down list box to select the search method to use.

Find: Select this button to start the search. The search results will be displayed beneath the Find an Ensemble tab.

See also

Create an Ensemble
Record Summary
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Home > Site Manager by the Section > Product Catalog > Ensembles > Create an Ensemble

Create an Ensemble

The Create an Ensemble tab allows you to create a new ensemble. For general information on working with ensembles, see the Ensembles page.

Text Box: Enter the name of the new ensemble.

Create Ensemble: Select this button to create the product. The page will redraw with tabs for for "Record Summary", "Attributes", "Images", "Metadata", "Related Items", "Products", and "Categories". A "Locales" tab will also be available if the site is an internationl site. Enter the appropriate information in each tab. Additional information on creating ensembles may also be found here.

See also

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Record Summary
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Record Summary

The Record Summary tab provides information on the modifications that have been made to the ensemble. At any point in time, there can be only two versions of a ensemble: a "master" version, which is approved for appearance on the website, and a "staged" version, which is in the process of being modified.

Run Report: Use this drop-down list box to select reports to run to obtain more detailed information about changes. Select "Go" to run the report.

Live Master Record: This summary box contains information on the master version of the ensemble. The title bar shows the current status of the master version of the ensemble. The date and time the ensemble first ran is listed with the "Start Date", and the date and time the master version of the ensemble was last updated is listed with the "Updated Date".

Staged Changes: This summary box contains information on the staged version of the ensemble. If there is currently no staged version, that will be noted in the box. The title of the box contains the current workflow status of the staged version. "Release Date" will show the date and time that the staged version is scheduled to be released for appearance on the website. "Last Updated" shows the date and time the staged version was last modified. "Variations" lists the number of modifications that have been made to the staged version. Selecting the number of changes will open a new tab, which will list all of the changes that have occurred. Selecting "RESET RECORD" will erase of all the changes and the staged version will revert back to match the master version of the ensemble.

Audit Trail & User Comments: This summary box provides a listing of each modification that has been made to the ensemble, both to the master and the staged versions. Selecting "View" for any modification will open a new window, with a larger view of each modification.

Staged Changes: Variations from Master Record: This summary box provides a listing of all of the changes that have been made to the staged version of the ensemble. Selecting "Edit" for any change will open the ensemble tab that change was made in (for example, selecting "edit" for a modification to the "Gift wrap available" field will open the "Attributes" tab).

See also

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Home > Site Manager by the Section > Product Catalog > Ensembles > Attributes

Attributes

The Attributes tab provides a number of different attributes for the ensemble.

Active: This checkbox indicates whether or not the ensemble is active and available for presentation on the website.

Ensemble Information: This summary box contains information about the ensemble.

- **Ensemble Name**: This is the name that will appear on the website for the ensemble. This is a required field.
- **Start Date**: This is the date the ensemble will first become available for presentation on the website. An empty date means the ensemble will be available immediately.
- **Start Time**: This is the time on the start date that the ensemble will be available for presentation on the website. An empty time means the ensemble will be available immediately.
- **End Date**: This is the last date that the ensemble will be available for presentation on the website. An empty date means the ensemble will continue to run until it is manually removed.
- **End Time**: This is the time on the last day that the ensemble will no longer be available for presentation on the website. An empty time means the ensemble will continue to run until midnight on the last day.
- **Ensemble Template**: This drop-down list box contains the name of the ensemble template, if any, to be used with the ensemble. The ensemble template is a pre-defined template that affects the formatting of the ensemble detail page. If a ensemble template is selected here, it will override any other formatting for the ensemble detail page of the current ensemble.

Associated Catalogs: This area contains the sites and catalogs the ensemble is associated with. The sites will be listed first, with the catalogs in each site listed beneath them.

Description: This summary box contains the description used on the ensemble detail page to describe the ensemble. The description should include the most important information about the ensemble. The description may be formatted using the formatting tools of the text editor box.

Save Attributes: This button is used to save modification made on this tab. Modifications will not be saved unless this button is selected.

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Images

The Images tab allows you to manage the image(s) for the current ensemble. These images will be displayed on the website on the ensemble detail page for the ensemble.

Add Image: This summary box allows you to add an image to the ensemble.

- **Image File Name**: Enter the name of an image file in this field. The following characters are not permitted in image file names: \ ; / ? : @ & = + $, * " < > | ' { } % as well as spaces.
- **Look Up**: Select this button to search for the image. If the image is found, it will appear next to the Image File Name field.
- **Add Image**: Select this button to add an image to the product. The "Look Up" button must have been used to find an image prior to this button being selected.

Define Alternate Name: This summary box contains the information to define the alternate image name for the ensemble. The alternate name is used by assistive screen readers and search engine spiders and should indicate what the image represents. Although a ensemble may have multiple images, only one alternate image name is necessary per ensemble. The default alternate image name that will be provided for the ensemble will be " at ".

- **ALT Name**: This text entry field contains the alternate image name for the ensemble. Modify this as necessary.
- **Update**: Selecting this button will save any modifications to the alternate image name. No modifications will be saved until this button is selected.
- **Restore Original**: Selecting this link will restore the alternate image name to its default value, which is " at ". Select "Update" after selecting this link to save the default name as the alternate image name.

Current Ensemble Images: This summary box contains all the images currently associated with the ensemble. Select "Primary Image" under the image that should be the primary image for the ensemble. Activate and deactivate images by selecting and deselecting the "Active" checkbox underneath each image. Inactive images will not appear on the website. Remove an image by selecting the "Delete" icon beneath it.

See also

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Home > Site Manager by the Section > Product Catalog > Ensembles > Metadata

Metadata

The Metadata tab contains information that used to make the ensemble easier to find during searches.

SEO: The SEO summary box contains information that is used for Search Engine Optimization, or external search engines. The items in this box are meant to be used to help external search engines locate the ensemble.

- **Exclude from XML Sitemap:** Select this checkbox to exclude the category detail page from the sitemap that is generated for SEO.
- **Change Frequency:** Select a value from this drop-down to indicate how frequently the category detail page is updated. This will be included in the generated sitemap for the site.
- **Priority:** Select a value from this drop-down to indicate how important the category detail page is in comparison to other pages on the site. The higher the number chosen, the higher the importance of the category detail page. This will be included in the generated sitemap for the site.
- **URL Name Overrride**: Enter text that will replace the ensemble name in the dynamically-generated SEO-friendly URL of the ensemble. Capital letters will be replaced with lowercase letters. Blank spaces and non-alphanumeric characters will be replaced by a dash.
- **Page Title Override**: Enter text that will replace the dynamically generated SEO page title. Note - If the site generates page titles such that they contain standard text (e.g., appending the site name within the page title), the standard text will be added to the page title entered in this field.
- **Meta Description**: Enter the description that should be made available to external search engines.
- **Meta Keywords**: Enter the search keywords that will be made available to external search engines. Meta keywords appear in the source of the page for the ensemble.

Site Search: The Site Search summary box contains information that is used by the site's search engine to locate the ensemble. Enter the list of keywords which can be used to match the ensemble in the "Keywords" text field.

Save Metadata: This button saves the changes made on this tab to the database. Any changes made will not be saved unless this button is selected.

See also

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Related Items

The Related Items tab provides ways to manage the cross sell and up sell products and/or ensembles that are displayed with the current ensemble.

Category: This drop-down list box allows you to choose between "Cross Sells" and "Up Sells". All of the information on the rest of this tab will correspond to whatever is selected in this drop-down.

Show Thumbnails: This button allows you to view the thumbnails of each item in the item list. Thumbnails will appear in the Thumbnail column.

Add Product: This button allows you to add a product to the list of manually associated products/ensembles. A pop-up window will appear when you select this button, allowing you to select the product you want to add.

Add Ensemble: This button allows you to add an ensemble to the list of manually associated products/ensembles. A pop-up window will appear when you select this button, allowing you to select the ensemble you want to add.

Item List: This is a list of the cross sell and up sell products and/or ensembles that have been associated with this ensemble. Associated products and/or ensembles can be removed by selecting the "Remove" icon. They can be activated and deactivated by selecting or deselecting the "Active" checkbox. Inactive products/ensembles will not be shown as a cross sell or up sell.

See also

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Products

The Products tab allows you to manage the products that are part of the current ensemble.

Show Thumbnails: This button allows you to view the thumbnails for each product in the product list. Thumbnails will appear in the Thumbnail column.

Add Product: This button allows you to add a product to the ensemble. A pop-up window will appear, where the product can be chosen. Once chosen, the product will be added to the list of products.

Product List: The list of products in the ensemble is displayed in the lower portion of the page. A product may be activated/deactived by selecting or deselecting the "Active" checkbox. Inactive products will not be included on the ensemble detail page for the ensemble. A product may be removed from the ensemble by selecting the "Remove" icon.

See also

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Home > Site Manager by the Section > Product Catalog > Ensembles > Categories

Categories

The Categories tab allows you to manage the categories the ensemble is associated with.

Add Category: This button allows you to select a new category to add the ensemble to. A pop-up window will appear and you can navigate to the desired category in it.

Category List: The list of categories the ensemble is included in is shown on the lower portion of the page. Categories may be activated or deactivated by selecting or deslecting the "Active" checkbox. Deactivating a category will keep the ensemble in the category, but it will not appear on the website in that category. Ensembles may be removed from a category by selecting the "Delete" icon for the category.

See also

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Home > Site Manager by the Section > Product Catalog > Ensembles > Locales

Locales

The Locales tab allows you to manage various attributes of the ensemble for the different locales defined for the site. This tab is available only for international sites.

Each table on this tab allows you to maintain a different set of attributes for the ensemble. Within the tables is a list of the locales available for the site. To customize the attributes of the ensemble for a locale, select the edit icon to the right of the locale.

Ensemble Attributes: Edit a locale in this list to tailor ensemble attributes for the locale. See Ensemble Attributes by Locale for additional information.

Ensemble Price Attributes: Edit a locale in this list to tailor the price of the ensemble for the locale. See Ensemble Price by Locale for additional information.

Articles in this section

Ensemble Attributes by Locale

Ensemble Price by Locale

See also

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Home > Site Manager by the Section > Product Catalog > Ensembles > Locales > Ensemble Attributes by Locale

Ensemble Attributes by Locale

The Ensemble Attribute by Locale page allows you customize certain ensemble attributes for the selected locale.

Attribute Group Summary: This non-editable summary box contains information on the selected locale.

- **Name**: The name of the attributes that are being edited.
- **Language**: The language of the locale.
- **Country:** The country/countries the locale is valid for.
- **Currency**: The currency/currencies used in the locale.

Editing Ensemble Attributes for : This summary box contains the ensemble attributes that you can modify for the locale.

- **Ensemble Name**: The name of the ensemble.
- **Ensemble Template**: The template used to display the ensemble page of the ensemble on the web site.
- **Description**: The description of the ensemble.
- **Image ALT Name**: The alternate name of the image used for the ensemble. The alternate name is displayed if the image is not available.
- **Meta Description**: The meta description of the ensemble. This is the description that is made available to external search engines.
- **Meta Keywords**: The meta keywords of the ensemble. These are the keywords that are made available to external search engines. Meta keywords will appear in the source of the page for the ensemble.
- **On-Site Search Keywords**: The search keywords that this ensemble will be considered a match for when a search is executed on the web site.

Save Updates: Select the button to save the modifications made on this page. No changes will saved until this button is selected.

See also

Ensemble Price by Locale

Home > Site Manager by the Section > Product Catalog > Ensembles > Locales > Ensemble Price by Locale

Ensemble Price by Locale

The Ensemble Price by Locale page allows you to adjust the price of an ensemble for a specific locale.

Attribute Group Summary: This non-editable summary box contains information on the selected locale.

- **Name**: The name of the attributes that are being edited.
- **Language**: The language of the locale.
- **Country:** The country/countries the locale is valid for.
- **Currency**: The currency/currencies used in the locale

Editing Ensemble Price Attributes for : This summary box contains the pricing information for the ensemble for the selected locale.

- **Display Price**: This non-editable text field contains the display price for the ensemble.
- **MSRP**: This text entry field contains the Manufacturer's Suggested Retail Price for the ensemble.

Save Updates: Select this button to save the modifications made on this page. No modifications will be saved until this button is selected.

See also

Ensemble Attributes by Locale

Categories

Use this page to manage the categories defined in the site's catalog. You may add, delete, and edit categories.

To view categories hierarchically:

1. Select the "Categories Hierarchy" tab.
2. Use the "View categories hierarchy from:" drop-down list box to select the catalog you wish to view.
3. Select "View Categories". A list of all the categories will appear below. Select the 'plus' and 'minus' signs to the left of each category name to expand and collapse each category.

To find a category:

1. Select the "Find a Category" tab.
2. Enter a search term in the "Search Term" entry field.
3. Select the search criteria in the "Search By" drop-down.
4. Select "Find". A list of all matching categories will appear below.

To view all categories:

1. Select the "Find a Category" tab.
2. Select "View All Categories". A list of all of the categories will appear below.

To activate a category:

1. Find the category you wish to activate.
2. Check the "Active" checkbox to the right of the category name.

To deactivate a category:

1. Find the category you wish to deactivate.
2. Uncheck the "Active" checkbox to the right of the category name.

To delete a category:

1. Find the category you wish to delete.
2. Select the "Delete" icon to the right of the category name.

To edit a category:

1. Find the category you wish to edit.
2. Select the "Category Name" or the "Edit" icon to the right of the category name. A new page will appear with tabs for "Attributes", "Metadata", "Subcategories", "Products and Ensembles", and "Files". A "Locales" tab will be available if the site is an international site.
3. Select the "Attributes" tab to modify the attributes for the category. Select "Save Attributes" to save your changes.
4. Select the "Metadata" tab to modify the Search Engine Optimization meta data for the category. These are the terms that will be made available web search engines for the category. Select "Save Meta Tags" to save your changes.
5. Select the "Subcategories" tab to modify subcategories for the category.
    - To add a new subcategory, select "Add an Existing Subcategory". A new window will open and you can search for a category or display all the categories in the window. Select the "Select" box for the category you wish to add. The category will disappear from the list of categories and appear on the "Subcategories" tab. Close the window when you are done adding subcategories.
    - To change the order of the subcategories, click and drag the subcategories into the order they should appear in on the webpage.
    - Select "Active" to activate the subcategories. Inactive subcategories will not appear on the website.
6. Select the "Products and Ensembles" tab to modify products and ensembles for the category.
    - To add a product or ensemble, select "Add Products" or "Add Ensembles". A new window will pop up and you will be able to search for a product/ensemble or view all products/ensembles. Select the "Select" box and the product/ensemble will be removed from the window and will be added to the list on the "Products and Ensembles" tab.
    - To move or copy some products/ensembles to another category, select the products/ensemble and then select "Copy Selected Items" or "Move Selected Items". A new window will apear and you may find a category or view all the categories. Select the category the products/ensembles should be moved to. The window will close and products/ensembles will be copied/moved to the selected category. If the item was moved, it will be removed from the list of items shown on the tab.
    - To reorder the products/ensembles, click and drag the product/ensemble so that it is in the correct order for the category.
    - Select the "Active" checkbox to activate the product/ensemble so that it will appear on the website. Deselect the "Active" checkbox to deactivate the product/ensemble and keep it from appearing on the website.
7. Select the "Files" tab to modify files for the category.
    - To add a new file, select "Add Category File" to add a file. The tab refreshes. Select the type of file you want to add from the "Category File Type" drop-down list. Enter the name of the file "File Name", or select "Select File" to browse to the file. Enter the display name of the file in the "Display Name" field. Select "Save File" to save the file. The tab refreshes. Add another file or select "Back to File List" to return to the list of files and see the ones that have been

added.
    - To modify an existing file, select the "Edit" icon for that file. Follow the steps above to make changes to the file.
    - Select "Remove" to remove the file.
8. Select the "Locales" tab to customize attributes of the category for a locale. Available only for international sites.
    - Select the "Edit" icon to the right of the locale you want to make changes for. The page will refresh.
    - Modify the attributes as desired. See "Category Attributes by Locale" for additional information.
    - Select "Save Updates" to save the changes.
9. Select "Back to Find Categories" to return to the previous page.

To create a category:

1. Select the "Create a Category" tab.
2. Enter the name of the category in the text box.
3. Select "Create Category". A new page will appear with tabs for "Attributes", "Metadata", "Subcategories", "Products and Ensembles", and "Files". A "Locales" tab will be available if the site is an international site.
4. Select the "Attributes" tab to enter the attributes for the category. If you leave the start date blank, the category will be effective immediately. If you leave the end date blank, the category will remain active until it is either manually deactivated or an end date is entered for it later. Select "Save Attributes" to save your changes.
5. Select the "Metadata" tab to enter the Search Engine Optimization meta data for the category. These are the terms that will be made available web search engines for the category. Select "Save Meta Tags" to save your changes.
6. Select the "Subcategories" tab to add subcategories to the category.
    - Select "Add an Existing Subcategory". A new window will open and you can search for a category or display all the categories in the window. Select the "Select" box for the category you wish to add. The category will disappear from the list of categories and appear on the "Subcategories" tab. Close the window when you are done adding subcategories.
    - Click and drag the subcategories into the order they should appear in on the webpage.
    - Select "Active" to activate the subcategories. Inactive subcategories will not appear on the website.
7. Select the "Products and Ensembles" tab to add products and ensembles to the category.
    - Select "Add Products" or "Add Ensembles". A new window will pop up and you will be able to search for a product/ensemble or view all products/ensembles. Select the "Select" box and the product/ensemble will be removed from the window and will be added to the list on the "Products and Ensembles" tab. Close the window when you are done adding products/ensembles to the category.
    - Click and drag the product/ensemble that was added so that it is in the correct order for the category.
    - Select the "Active" checkbox to activate the product/ensemble so that it will appear on the website.
8. Select the "Files" tab to add files to the category.
    - Select "Add Category File" to add a file. The tab refreshes.
    - Select the type of file you want to add from the "Category File Type" drop-down list.
    - Enter the name of the file in the "File Name" field, or select "Select File" to browse to the file.
    - Enter the display name of the file in the "Display Name" field.
    - Select "Save File" to save the file. The tab refreshes.
    - Add another file or select "Back to File List" to return to the list of files and see the ones that have been added.
9. Select the "Locales" tab to customize attributes of the category for a locale. Available only for international sites.
    - Select the "Edit" icon to the right of the locale you want to make changes for. The page will refresh.
    - Modify the attributes as desired. See "Category Attributes by Locale" for additional information.
    - Select "Save Updates" to save the changes.
10. Select "Back to Find Categories" to return to the previous page.

To customize a category for a locale (for international sites only):

1. Find the category you wish to edit.
2. Select the "Category Name" or the "Edit" icon to the right of the category name. A new page will appear with tabs for "Attributes", "Metadata", "Subcategories", "Products and Ensembles", "Files" and "Locales".
3. Select the "Locales" tab.
4. In the table of locales, select the "Edit" icon to the right of the locale you wish to customize the category for. The page will refresh.
5. Modify the attributes as desired. See "Category Attributes by Locale" for additional information.
6. Select "Save Updates" to save the modifications.

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Home > Site Manager by the Section > Product Catalog > Categories > Category Hierarchy

Category Hierarchy

The Category Hierarchy tab provides a method to view the categories in the site in a hierarchical manner. For general information on working with categories, see the Categories page.

View category hierachy in: Use this drop-down list box to select the catalog whose categories you wish to view.

View Categories: Select this button to display the categories in the selected catalog. The categories will appear below the Category Hierarchy tab.

Category List: The categories will be displayed in this list.

- **Category**: This column contains the name of the category. If the category has sub-categories, there will be a plus (+) icon to the left of the category name. Selecting that icon will expand the category and display its subcategories.
- **Category ID**: This column contains the internal identifier of the category.
- **Edit**: Select this icon to edit the category. A new tab will appear.
- **Add Product**: Select this icon to add a product to the category. A pop-up window will appear where you can select your product(s).
- **Add Ensemble**: Select this icon to add an ensemble to the category. A pop-up window will appear where you can select your ensemble(s).
- **Add Subcategory**: Select this icon to a sub-category to the category. A pop-up window will appear where you can select your subcategory(s).

See also

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Home > Site Manager by the Section > Product Catalog > Categories > Find a Category

Find a Category

The Find a Category tab allows you to search for a specific category, or view all the categories in the current catalog. For general information on working with categories, see the Categories page.

Search Term: Enter the name of the category to search for.

Search By: Select the field to be used to match to the search term.

Find: Select this button to search for the category in the text box. Search results will appear beneath the Find a Category tab.

View All Categories: Select this button to view all of the categories defined for the current catalog. The categories will appear in alphabetical order beneath the Find a Category tab.

Search Results List: The matching categories will be displayed in this list.

- **Category Name**: This column contains the name of the category. Select the name to edit the category.
- **Category ID**: This column contains the internal identifier of the category.
- **Start Date**: This column contains the first date the category is available for display on the site.
- **End Date**: This column contains the last date the category is available for display on the site.
- **Active**: Select/deselect this column to activate/deactivate the category. Inactive categories are not displayed on the site.
- **Edit**: Select this icon to edit the category.
- **Delete**: Select this icon to delete the category.
- **Add Product**: Select this icon to add a product to the category. A pop-up window will appear where you can select the product(s).
- **Add Ensemble**: Select this icon to add an ensemble to the category. A pop-up window will appear where you can select the ensemble(s).

See also

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Home > Site Manager by the Section > Product Catalog > Categories > Create a Category

Create a Category

The Create a Category tab allows you to create a new category. For general information on working with categories, see the Categories page.

Text box: Enter the name of the new category.

Create Category: Select this button to create the new category.   The page will redraw with tabs for "Attributes", "SEO", "Subcategories", "Products and Ensembles", and "Files". A "Locales" tab will be available if the site is an international site. Fill in the appropriate information for the category on each tab. Additional information on creating categories may be found here.

See also

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Home > Site Manager by the Section > Product Catalog > Categories > Attributes

Attributes

The Attributes tab provides options for some of the basic information of the current category.

Active: This checkbox indicates whether or not the category is active and available for presentation on the website. Inactive categories, along with their subcategories, will not be displayed on the website. (Note: the subcategory of an inactive category *can* be displayed if it is also a subcategory of an active category. In that situation it will appear under it's active parent category.)

Display in Mobile App: This checkbox indicates whether or not the category will be displayed in the mobile application. If unchecked, the category will not be displayed.

Category Information: This summary box contains the basic information for the current category.

- **Category Name**: This text entry field contains the name of the category. The name will be used to refer to the category in the Site Manager, as well as on the website.
- **Start Date**: This is the date the category will first become available for presentation on the website. An empty date means the category will be available immediately.
- **Start Time**: This is the time on the start date that the category will be available for presentation on the website. An empty time means the category will be available immediately.
- **End Date**: This is the last date that the category will be available for presentation on the website. An empty date means the category will continue to run until it is manually removed.
- **End Time**: This is the time on the last day that the category will no longer be available for presentation on the website. An empty time means the category will continue to run until midnight on the last day.
- **Category Template**: This drop-down list box has choices for the category template to use on the category page of the current category on the website. The category template is a pre-defined template that affects the formatting of the category page. If no template is selected, the formatting of the category page will follow that of the site default for categories.
- **Product Template**: This drop-down list box has choices for the product template to use for all of the products in the category. The product template is a pre-defined template that affects the formatting of the product detail page. If a product template is selected here, it will be overriden by any product template chosen on a product's attribute page. If no template is selected, the formatting of the product detail page will follow that of the site default for products.
- **Ensemble Template**: This drop-down list box has choices for the ensemble template to use for all of the ensembles in the category. The ensemble template is a pre-defined template that affects the formatting of the ensemble detail page. If an ensemble template is selected here, it will be overriden by any ensemble template chosen on an ensemble's attribute page. If no template is selected, the formatting of the ensemble detail page will follow that of the site default for ensembles.

Add Image: This summary box allows you to add an image to the category.

- **Image File Name**: Enter the name of an image file in this field. The following characters are not permitted in image file names: \ ; / ? : @ & = + $, * " < > | ' { } % as well as spaces.
- **Look Up**: Select this button to search for the image. If the image is found, it will appear next to the Image File Name field.
- **Add Image**: Select this button to add an image to the product. The "Look Up" button must have been used to find an image prior to this button being selected.

Define Alternate Name: This summary box allows you to define an alternate name that will be displayed if the image is not available, and will be used by assistive screen reading devices.

- **Alt Name**: Enter the alternate name for the image in this field.
- **Update**: Select this button to update the alternate name.
- **Restore Original**: Select this link to restore the alternate name to the original alternate name.

Current Category Images: This summary box displays the current images associated with the category. Select the "Active" icon under an image to make the image active. Inactive images will not be displayed on the website.

Save Attributes: This button saves the modifications to this tab to the database. No modifications will be saved until this button is selected.

See also

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Home > Site Manager by the Section > Product Catalog > Categories > Metadata

Metadata

The SEO tab provides information for Search Engine Optimizations, used when external search engines are examining the site.

SEO (Used for searches conducted via external search engines): This section contains settings that affect the information about the category that is made available to external search engines.

- **Exclude from XML Sitemap:** Select this checkbox to exclude the category detail page from the sitemap that is generated for SEO.
- **Change Frequency:** Select a value from this drop-down to indicate how frequently the category detail page is updated. This will be included in the generated sitemap for the site.
- **Priority:** Select a value from this drop-down to indicate how important the category detail page is in comparison to other pages on the site. The higher the number chosen, the higher the importance of the category detail page. This will be included in the generated sitemap for the site.
- **URL Name Override**: Enter text that will override the category name in the URL for the category. Capital letters will be replaced with lowercase letters. Spaces and non-alphanumeric characters are replaced with dashes.
- **Page Title Override**: Enter text that will override the page title for the category page. The text in this field replaces the dynamically generated page title. Note - If the site generates page titles such that they contain standard text (e.g. appending the site name within the page title), the standard text will be added to the page title that is entered in this field.
- **Meta Descriptions**: Enter the description that should be made available to external search engines.
- **Meta Keywords**: Enter the search keywords that should be made available to external search engines. Meta keywords will appear in the source of the page for the category.

Site Search (Used for searches conducted on the brand website): This section contains information that will be used for searches on the website.

- **Keywords**: Enter keywords that will be used for searches performed on the website. Any search performed using one of the keywords will return the category as a match for the search.

Save Metadata: This button saves modifications made on this tab to the database. No modifications will be saved until this tab is selected.

See also

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Subcategories

The Subcategories tab allows you to manage the subcategories of the current category.

Subcategories List: The subcategories list shows all the subcategories of the current category. The categories are listed in the order they will appear in on the website. Changes to this order are effective immediately.

- **Batch**: Select this checkbox if you have multiple subcategories that you want to reorder at the same time. Select "Move To Top" for any of the batch subcategories, and all selected categories will move to the top of the list together.
- **Sort Order**: This column shows the numeric sort order for each subcategory. To reorder subcategories, change the number appearing in this column for the affected subcategories, then select "Update Sort Order".
- **Subcategory Name**: This column shows the name of each subcategory. Select a name to edit a subcategory.
- **Subcategory Start Date**: This column contains the date the subcategory becomes available for display.
- **Subcategory End Date**: This column contains the last date the subcategory is available for display.
- **Subcategory Active**: This column indicates whether or not the subcategory is active.
- **Start in Category**: This column contains the first date the subcategory is part of the category.
- **End in Category**: This column contains the last date the subcategory is part of the category.
- **Active in Category**: This checkbox indicates whether or not the subcategory is active and available for presentation on the website. Inactive categories will not appear on the website.
- **Edit**: Select this icon to edit the subcategory.
- **Remove**: Select this icon to remove the category.
- **Move To Top**: Select this icon to move the subcategory to the top of the sort order.

Update Sort Order: This button will update the sort order of the subcategories based on the modifications made in the "Sort Order" column.

Add an Existing Subcategory: This button allows you to add an additional category as a subcategory of the current category. The new category must already be defined for the website. A pop-up window will appear to allow you to select the new subcategory.

See also

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Find a Category
Create a Category
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Locales

Home > Site Manager by the Section > Product Catalog > Categories > Products and Ensembles

Products and Ensembles

The Products and Ensembles tab allows you to manage the products and ensembles that are included in the current category. You can work with the products and ensembles using a table or a grid view.

View: Select a way to view the items.

- **Table**: If viewing the items in a table, you will see the controls listed on the Table page.
- **Grid**: If viewing the items in a grid, you will see the controls listed on the Grid page.

Add Product: This button is available in both the table and grid views. It allows you to add a product the current category. A pop-up window will appear which will allow you to search for and select the product to add.

Add Ensemble: This button is available in both the table and grid views. It allows you to add an ensemble to the current category. A pop-up window will appear which will allow you to search for and select the ensemble to add.

Articles in this section

Table View

Grid View

Edit Category Relationship

See also

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Home > Site Manager by the Section > Product Catalog > Categories > Products and Ensembles > Table View

Table View

When working with products and ensembles in a table view, the tools listed below will be available for you.

Items List: The items list shows all the products and ensembles in the current category. The products and ensembles are listed in the order they will appear in on the website. Changes to this order are effective immediately.

- **Batch**: Select this checkbox if you have multiple items that you want to reorder at the same time. Select "Move To Top" for any of the batch items, and all of the selected items will move to the top of the list together. This column is also used in conjunction with the "Activate Selected", "Deactivate Selected", "Copy Selected Items", and "Move Selected Items" buttons.
- **Sort Order**: This column shows the numeric sort order for each item. To reorder items, change the number appearing in this column for the affected items, then select "Update Sort Order".
- **Item Name**: This column shows the name of each item. Select a name to edit an item.
- **Thumbnail**: This column displays the thumbnail image of the item.
- **Item Start Date**: This column contains the first date the item is available on the website.
- **Item End Date**: This column contains the last date the item is available on the website.
- **Item Active**: This checkbox indicates whether or not the item is active and available for presentation on the website. Inactive items will not appear on the website.
- **Start in Category**: This column contains the first date the item is considered a part of the category.
- **End in Category**: This column contains the last date the item is considered a part of the category.
- **Active in Category**: This column indicates whether or not the item is active in the category.
- **Edit**: Select this icon to edit the relationship between the item and the category. The Edit Category Relationship window will appear.
- **Remove**: Select this icon to remove the item.
- **Workflow**: This column reflects the workflow status of the item.
- **Move To Top**: Select this icon to move the item to the top of the sort order.

Update Sort Order: This button will update the sort order of the items based on the modifications made in the "Sort Order" column.

Check All: This button will check the "Batch" checkbox of all of the items in the list.

Uncheck All: This button will uncheck the "Batch" checkbox of all of the items in the list.

Activate Selected: This button will activate all of the items that currently have their "Batch" checkbox selected.

Deactivate Selected: This button will deactivate all of the items that currently have their "Batch" checkbox selected.

Copy Selected Items: This button will add all of the items with their "Batch" checkbox selected to a new category. A pop-up window will appear which will allow you to search for and select the category the items should be added to. The selected items will continue to be in the current category (they will appear in the new category in addition to the current one).

Move Selected Items: This button will move all of the items with their "Batch" checkbox selected to a new category. A pop-up window will appear which will allow you to search for and select the category the items should be moved to. The selected items will no longer be in the current category (they will appear in the new category, but not in the current one).

Delete Selected Items: This button will remove from the category all of the items that have their "Batch" checkbox selected. The items removed will no longer appear in the category, but will not be removed from the database.

See also

Grid View
Edit Category Relationship

Home > Site Manager by the Section > Product Catalog > Categories > Products and Ensembles > Grid View

Grid View

When working with products and ensembles in a Grid view, the tools listed below will be available for you.

Include: Select an option to customize which products and ensembles are shown in the grid.

- **All Items**: Select this option to view all items in the category, including items that have ended and are no longer available on the web site.
- **Only Items that Haven't Ended in Category**: Select this option to view only the products and ensembles in the category that are available for presentation on the web site. Items that will not appear are items with an inactive category to item relationship, or items whose end date for the category to item relationship is in the past.

Viewing Device Type: Select an entry in this drop-down to change the view to match that of the selected device type. If no selection is made, the grid will appear in the desktop mode.

- **Mobile**: Select this option to have the grid appear as it will on a mobile device.
- **Tablet**: Select this option to have the grid appear as it will on a tablet device.
- **Desktop**: Select this option to have the grid appear as it will on a desktop.

Item Grid: The displayed grid shows the items in the category and the order the items appear in in the category. You can perform the following operations within the grid:

- **Edit an item**: Select an item to edit it.
- **Change the order of items**: Drag and drop items to change their order in the category.
- **Move an item to the beginning of the grid**: Select the "gear" icon to the left of a product's name, then select the "Top" icon that appears.
- **Edit the category relationship of an item**: Select the "gear" icon to the left of a product's name, then select the "Edit" icon that appears. The Edit Category Relationship window will appear.
- **Remove an item from the category**: Select the "gear" icon to the left of a product's name, then select the "Delete" icon that appears. The item will be removed from the category, but not from the database.

See also

Table View
Edit Category Relationship

Home > Site Manager by the Section > Product Catalog > Categories > Products and Ensembles > Edit Category Relationship

Edit Category Relationship

This window allows you to edit relationship between a category and a product or an ensemble.

Category Information: This area includes information on the category.

- **Category Name**: This field contains the name of the category.
- **Category ID**: This field contains the internal identifier of the category.

Product/Ensemble Information: This area contains information on the product or ensemble.

- **Product Name**: This field contains the name of the product/ensemble.
- **Product ID**: This field contains the internal identifier of the product/ensemble.
- **Style #**: This field contains the style number of the product. This field is not available when working with ensembles.
- **Ensemble Code**: This field contains the code for the ensemble. This field is not available when working with products.

Category to Product/Ensemble Relationship: This section contains information on the relationship between the category and the product/ensemble.

- **Active**: Select or deselect the checkbox to activate/deactivate the relationship between the category and the product/ensemble.
- **Start Date**: Enter the first date of the relationship.
- **Start Time**: Enter the time on the first day that the relationship will take effect.
- **End Date**: Enter the last date of the relationship.
- **End Time**: Enter the time on the last day that the relationship will no longer be in effect.
- **Relationship Created**: This field contains the date that the relationship was created.
- **Relationship Last Updated**: This field contains the date that the relationship was last updated.

Cancel: Select this button to cancel your modifications and dismiss the window.

Save: Select this button to save your modifications and dismiss the window.

See also

Table View
Grid View

Files

The Files tab allows you to associate a file with the current category.

Add Category File: Selecting this button will allow you to add a file to the category. The page will refresh and you will find fields that allows you to select the file type, indicate the file name, and select a name for the file.

File List: A list of the files associated with the category will be displayed in the lower portion of the page. The properties of a file can be modified by selecting the "Edit" icon. A file can be activated or deactivated by selecting or deselecting the "Active" checkbox. Inactive files will not be available on the website. Files may be removed by selecting the "Remove" icon.

See also

Category Hierarchy
Find a Category
Create a Category
Attributes
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Home > Site Manager by the Section > Product Catalog > Categories > Locales

Locales

The Locales tab allows you to manage various attributes of a category for the different locales defined for the site. This tab is available only for international sites.

The tables on this tab contains a list of the locales available for the site. To customize the attributes of a category for a locale, select the edit icon to the right of the locale.

Category Attributes: Edit a locale in this list to tailor category attributes for the locale. See Category Attributes by Locale for additional information.

Articles in this section

Category Attributes by Locale

See also

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Home > Site Manager by the Section > Product Catalog > Categories > Locales > Category Attributes by Locale

Category Attributes by Locale

The Category Attribute by Locale page allows you customize certain category attributes for the selected locale.

Attribute Group Summary: This non-editable summary box contains information on the selected locale.

- **Name**: The name of the attributes that are being edited.
- **Language**: The language of the locale.
- **Country:** The country/countries the locale is valid for.
- **Currency**: The currency/currencies used in the locale.

Editing Category Attributes for : This summary box contains the category attributes that you can modify for the locale.

- **Category Name**: The name of the category.
- **Description**: The description of the category.
- **Category Template**: The template used to display the category page on the web site.
- **Product Template**: The template used to display product pages on the web site. A product template selected for a specific product will override this template.
- **Ensemble Template**: The template used to display the ensemble pages on the web site. An ensemble template selected for a specific ensemble will overrride this template.
- **Meta Description**: The meta description of the category. This is the description that is made available to external search engines.
- **Meta Keywords**: The meta keywords of the category. These are the keywords that are made available to external search engines. Meta keywords will appear in the source of the page for the category.

Save Updates: Select the button to save the modifications made on this page. No changes will saved until this button is selected.

Home > Site Manager by the Section > Product Catalog > Catalogs

Catalogs

Use this page to manage the catalog(s) defined for the site. You may add, edit, and delete catalogs.

To create a catalog:

1. Enter the name of the new catalog in the text box in the "Create a Catalog" tab box.
2. Select "Create Catalog". A new page will appear with tabs for "Attributes" and "Root Categories".
3. On the "Attributes" tab, select the "Active" checkbox to make the catalog active.
4. Select the "Root Categories" tab to add root categories to the catalog.
    - Select "Add a Root Category". A new window will appear. Find the category you are interested in or select "View All Categories" to view all the categories. Select the "Select" checkbox for a category that you want to have as a root category. The category will disapper from the list and appear on the "Root Categories" tab. Close the window when you are done adding categories.
    - Click and drag the categories to order them in the way they should appear on the website.
    - Select the "Active" checkbox to activate the categories. Inactive categories will not appear on the website.
5. Select "Back to Catalog List" to return to the previous page.

To edit a catalog:

1. Select the "Catalog Name" of the catalog you wish to edit, or select the "Edit" icon to the right of the catalog name. A new page appears with tabs for "Attributes" and "Root Categories".
2. Select the "Attributes" tab to modify the attributes of the catalog. Select "Update Catalog Info" to save your changes.
3. Select the "Root Categories" tab to modify the root categories of the catalog.
    - To add a root category, select "Add a Root Category". A new window will appear. Find the category you are interested in or select "View All Categories" to view all the categories. Select the "Select" checkbox for a category that you want to have as a root category. The category will disapper from the list and appear on the "Root Categories" tab. Close the window when you are done adding categories.
    - To reorder the categories, click and drag them into the order they should appear on the website.
    - To activate a category, select the "Active" checkbox. To deactivate a category, deselect the "Active" checkbox. Inactive categories will not appear on the website.
4. Select "Back to Catalog List" to return to the previous page.

To delete a catalog:

1. Find the catalog you wish to delete.
2. Select the "Delete" icon to the right of the catalog name.

To set the default catalog:

1. Find the catalog you wish to have as the default catalog.
2. Check the "Default" checkbox to the right of the catalog name. Note that only one catalog at at time can be the default catalog, so any catalog previously set as default will no longer be.

To activate a catalog:

1. Find the catalog you wish to activate.
2. Check the "Active" checkbox to the right of the catalog name.

To deactivate a catalog:

1. Find the catalog you wish to deactivate.
2. Uncheck the "Active" checkbox to the right of the catalog name.

Articles in this section

Attributes

Root Categories

See also

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Global Product Updates
Product Types
Attribute Groups
Workflow Management
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Home > Site Manager by the Section > Product Catalog > Catalogs > Attributes

Attributes

The Attributes tab allows you to manage some of the attributes of the current catalog.

Active: This checkbox indicates whether or not the catalog is currently active. Inactive catalogs are not available for presentation on the website.

Catalog Name: This text entry field contains the name of the catalog. This name will be used to refer to the catalog throughout the Site Manager.

Update Catalog Info: This button saves modifications made on this tab to the database. Modifications will not be saved until this button is selected.

See also

Root Categories

Home > Site Manager by the Section > Product Catalog > Catalogs > Root Categories

Root Categories

The Root Categories tab allows you to set the root categories for the current catalog. The root categories should correspond to the top level categories of the site.

Root Categories List: This lists the root categories for the catalog. Select the name of a category to edit it, or select the "Edit" icon. Select or deselect the "Active" checkbox to activate or deactivate the category. Inactive categories will not be available for presentation on the website. Select the "Remove" icon to remove a category.

Add a Root Category: This button adds a category to the list of root categories. A pop-up window will appear which will allow you to search for and select the category to be added.

See also

Attributes

Home > Site Manager by the Section > Product Catalog > Refinements

Refinements

Use this page to manage the refinements defined for the site. You may add, edit, and delete refinements.

To add a refinement:

1. Enter a name for the refinement in the "Create a Refinement" box.
2. If the site is an international site, a multi-select listbox will be available that contains a list of the locales defined for the site. Select the locale(s) the refinement will be available for. Multiple locales may be selected by holding down the "Ctrl" key.
3. Select "Create Refinement". The page will refresh and you will see a series of tabbed pages.
4. On the "Details" tab, enter the attributes of the refinement:
    - Select the "Active" checkbox if the refinement should be active. Deselect the "Active" checkbox if the refinement should not be active.
    - Enter a start date and/or an end date if the refinement should be available only for a specific timeframe. Leave the start date blank if the refinement should be available immediately. Leave the end date blank if the refinement should remain available until manually cancelled later.
    - Enter a "Display Name" for the refinement. The display name is the character string that will be used to label the refinement when it is displayed.
    - Use the "UI Control" drop-down listbox to select the type of user interface control that should be used to display the refinement.
    - Use the "Sorting" drop-down listbox to select the sorting method that should be used to display the values of the refinement.
    - Use the "Source Type" drop-down listbox to select the source of the refinement values.
    - In the "Source Field" entry field, enter the name of the field in the source record that contains the values for the refinement.
    - In the "Filter Field" entry field, enter the name of the field in the search index that can be used when searching on the values of the refinement.
    - Select the "Numeric Data" checkbox if the values of the refinement should be treated as numbers. Deselect the checkbox if the values should be treated as text.
    - Select the "Treat as Range" checkbox if the values of the refinement should be treated as ranges. Deselect the checkbox if the values should be treated as individual values.
    - Select "Save Attributes" to save the information entered on this tab.
5. On the "Scope" tab, enter information to define when the refinement should appear.
    - Select the "Display Whenever Data is Available" checkbox if the refinement should appear whenever items are displayed that contain values for the refinement. Deselect the checkbox if the refinement should not appear every time an item is displayed that contains values for the refinement.
    - Select the "Add Category" button if there are specific categories the refinement should always be displayed for. A new window will appear where you can search for a category or list all the available categories. Selecting a category in the window will add it to the list of categories the refinement will appear in.
6. The "Values" tab will not contain any information until the refinement has been fully defined and the search index rebuilt. The "Values" tab may be skipped when creating a new refinement.
7. On the "Synonyms" tab, enter synonyms that will be used for the values of the refinement. Synonyms are values that should be treated the same when the refinement is used. For example, searching on "blue" should also return results for "aqua", "navy", "powder blue", etc.
    - Enter the primary value for the synonym in the "Primary Value" text field. The primary value is the value that will appear in the list of values displayed with the refinement.
    - Select "Create Synonym". The page will refresh.
    - In the list of synonyms, select the "Edit" icon for the synonym just created. A new window will appear.
    - In the new window, enter all of the values that are synonyms of the primary value. Synonyms should be entered as a comma-delimited list in the "Synonyms" text field.
    - Select "Save and Close". The window will dismiss.
8. On the "Locales" tab you can modify the locales the refinement will be valid for. This tab will reflect the locales selected when the refinement was created.
    - To add a locale to the refinement, select the locale in the "Unselected Locales" list box. Select "<- Add Locale". The locale will be moved to the "Selected Locales" list box.
    - To remove a locale for the refinement, select the locale in the "Selected Locales" list box. Select "-> Remove Locale". The locale will be moved to the "Unselected Locales" list box.

To modify a refinement:

1. Locate the refinement you wish to change in the list of refinements.
2. Select the "Edit" icon for the refinement.
3. Follow the instructions in the section above on creating a refinement for information on working with the various tabbed pages for the refinement.
4. On the "Values" tab is a list of the possible values that may appear in the refinement.
    - To deactivate a value and prevent it from appearing in the refinement, deselect "Active".
    - To activated a value and allow it to appear in the refinement, select "Active".
    - To remove a value and prevent it from appearing in the refinement, select "Remove".

To remove a refinement:

1. Locate the refinement you wish to remove in the list of refinements.

2. Select the "Delete" icon for that refinement.
3. A dialog box will appear, asking you to confirm the removal. Select "Yes".

To activate a refinement:

1. Locate the refinement you wish to activate in the list of refinements.
2. Select the "Active" checkbox next to the refinement.

To deactivate a refinement:

1. Locate the refinement you wish to deactivate in the list of refinements.
2. Deselect the "Active" checkbox next to the refinement.

Articles in this section

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See also

Products
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Home > Site Manager by the Section > Product Catalog > Refinements > Details

Details

The Details tab contains information that defines the setup of the current refinement.

Active: This checkbox indicates whether or not this refinement is available for use on the webiste. Inactive refinements will not be used on the website.

General: This summary box contains basic information for the refinement.

- **Name**: This text entry field contains the name of the refinement. This is the name the refinement will be referred to throughout the Site Manager.
- **Start Date**: This is the first date the refinement will be available for use on the website. An empty start date indicates the refinement is available immediately.
- **End Date**: This is the last date the refinement will be available for use on the website. An empty end date indicates the refinement will remain available until it is manually removed.

Data Type: This summary box contains information on where the data that will populate the refinement can be found. Refinement data is located within the search index used by the site. The information in this summary box describes where in the index the information is located.

- **Source Type**: This drop-down list box provides choices for the type of record within the search index where the refinement values will be located.
- **Source Field**: This text entry field contains the name of field within the document record that will contain the values for the refinement.
- **Filter Field**: This text entry field contains the name of the filter within the search index that will be used for the refinement values.
- **Numeric Data**: This checkbox indicates whether or not the refinement values should be interpreted as numeric or alphanumeric values. This checkbox must be selected if **Sort Numerically** is chosen as the Sorting option, but must remain unchecked for all other sort options.
- **Treat as Range**: This checkbox indicates whether or not the refinement values should be treated as a range. If this checkbox is checked, "Numeric Data" is usually also checked.

Display: This summary box contains information that affects the display of the refinement when it appears on a page on the website.

- **Display Name**: This text entry field contains the label that will proceed the the refinement when it appears on a page on the website.
- **UI Control**: This drop-down list box contains a selection of UI (User Interface) controls that can be used to display the refinement when it appears on a page on the website.
- **Sorting**: This drop-down list box contains a selection of sorting methods that will be used to sort the refinement values when they are displayed on the website. The sorting options are:
    - **Display Alphabetically**: The refinement values will be sorted alphabetically.
    - **Sort Numerically**: The refinement values will be sorted numerically. **Numeric Data** in the Data Type summary box must also be selected if this sort value is chosen.
    - **Most Relevant Values First**: The refinement values will be sorted based on the number of items that contain the refinement value. For example, in a refinement that is color based, the "blue" refinement value will appear before the "red" refinement value if there are more blue items than red items.
    - **Explicit Order**: The refinement values will be sorted based on the order they appear in on the Values tab. Refinement values may be manually ordered on that tab.

Save Attributes: This button will save modifications made on this tab to the database. No modifications will be saved until this button is selected.

See also

Scope
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Scope

The Scope tab provides information that affects when a refinement will appear on the website.

Display Whenever Data is Available: This checkbox indicates whether the refinement will appear any time a page contains an item that has data that part of the refinement's values. If this checkbox is unchecked, the refinement will only appear when one of the categories listed in "Assigned Categories" is being displayed.

Add Category: This button allows you to add a new category to the list of categories the refinement may be displayed with. A pop-up window will appear and allow you to select the new category. When the category is selected, it will appear in the "Assigned Categories" list.

Assigned Categories List: This is a list of the categories that the refinement is allowed to appear in. The refinement will appear in each category listed, as well as any sub-categories of each category. A category may be removed by selecting the "Remove" icon.

See also

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Locales

Values

The Values tab lists all of the values that are currently available for the refinement. These values are pulled from the index created by the search and will not be available for new refinements until the index has been rebuilt.

Values List: The list of values in the list is the list of all values available for inclusion in the refinement. Values may be activated or deactivated by selecting or deselecting the "Active" checkbox. Inactive values will not appear in the refinement. Values may be removed by selecting the "Remove" icon.

See also

Details
Scope
Synonyms
Locales

Synonyms

The Synonyms tab contains information on synonyms for refinement values. A synonym is a term that will be used in the refinement in place of other terms that mean similar things. For example, a synonym named "red" could be defined for a color refinement such that it would match colors named "brick", "mahogany", "barn", and others. "Red" would be included in the refinement in place of "brick", "mahogany", "barn", and its other values. If "red" is selected in the refinement, then all products with colors of "brick", "mahogany", "barn", and its other values will be shown as matches for the refinement.

Primary Value: This text entry field contains the text for the value of a new synonym. This value is the value that will appear in the refinement.

Create Synonym: This button will create a new synonym with whatever name is entered in the "Primary Value" text field. The new synonym will appear in the "Synonym Records" list.

Synonym Records: This is the list of synonyms that have been created for this refinement. A synonym may be edited by selecting its primary value, or the "Edit" icon. A synonym may be deleted by selecting the "Delete" icon.

See also

Details
Scope
Values
Locales

Home > Site Manager by the Section > Product Catalog > Refinements > Locales

Locales

The Locales tab allows you to modify the locales that the refinement is available for. This tab is only available on international sites. Modifications made on this tab are effective immediately.

Locale Information: This non-editable summary box contains information on the locales the refinement is available for. The information in these fields is updated as modifications are made on this tab.

- **Name**: The name of the refinement that is being edited.
- **Language**: The language(s) of the locale(s).
- **Country:** The country/countries the locale(s) is/are valid for.
- **Currency**: The currency/currencies used in the locale(s).

Selected Locales: This list box contains the list of locales that the refinement is available for.

Unselected Locales: This list box contains the list of locales that the refinement is not available for.

Add Locale: Select this button to move a selected locale from the "Unselected Locales" list box to the "Selected Locales" list box.

Remove Locale: Select this button to move a selected locale from the "Selected Locales" list box to the "Unselected Locales" list box.

See also

Details
Scope
Values
Synonyms

Home > Site Manager by the Section > Product Catalog > Global Product Updates

Global Product Updates

Use this page to perform advanced product searches and then update one or more attributes of the returned products. Products can be searched for by creating a search query, or by listing specific style numbers.

To find products using a search query:

1. Select "Search Query" in the "Search products using" drop-down list box.
2. Create a search condition:
   - Select a product search attribute from the left drop-down list box.
   - Select a comparison operation from the middle drop-down list box.
   - Enter a comparison value in the text entry field. Valid values for "Active Flag" are 'Y' and 'N' (without quotes). Dates must be in yyyy/mm/dd format.
3. Select "Add to Query" to add the search condition to the search query.
4. Continue creating and adding search conditions until the search query meets your requirements. Select "Reset Query" at any time to clear the current query.
5. Select "Find Products" to find the products that match the conditions of the search query. The page will refresh and the matching products will appear at the bottom of the screen.

To find products by style number:

1. Select "Comma-Separated List" in the "Search products using" drop-down list box. The page will redraw.
2. In the text entry field, enter the style numbers of the products to be located. Separate the style numbers with commas.
3. Select "Find Products". The page will redraw and the matching products will appear at the bottom of the screen.

To activate a product:

1. Find the product you wish to activate.
2. Check the "Active" check box to the right of the product name.

To deactivate a product:

1. Find the product you wish to deactivate.
2. Uncheck the "Active" check box to the right of the product name.

To delete a product:

1. Find the product you wish to delete.
2. Select the "Delete" icon to the right of the product name.

To view thumbnails of product images:

1. Find the product(s) whose images you want to view.
2. Hover your mouse over the "Thumbnails" icon for each product. The thumbnail will be displayed in a pop-up window.
3. To view thumbnails for all the products at once, select the "Show Thumbnails" check box. The thumbnails will be displayed in the "Thumbnails" column.

To edit a product:

1. Follow the steps above to search for the products you wish to edit..
2. Select the "Product Name" or the "Edit" icon to the right of the product name. The Product Updates tab will appear.
3. Make the appropriate changes on the Product Updates tab. Any changes made will apply only to the product that was selected.
4. Select "Save Updates" when all modifications have been made.

To edit all products:

1. Follow the steps above to search for the products you wish to edit.
2. Select "Update All Products". The Product Updates tab will appear.
3. Make the appropriate changes on the Product Updates tab. Any changes made will be applied to each product that was found.
4. Select "Save Updates" when all modifications have been made.

To edit some but not all of the products:

1. Follow the steps above to search for the products you wish to edit.
2. In the list of matching products, select the "Batch Select" checkbox to the left of each product you wish to modify.
3. Select "Update Selected Products". The Product Updates tab will appear.
4. Make the approriate changes on the Product Updates tab. Any changes made will be applied to each product that was selected.
5. Select "Save Updates" when all modifications have been made.

To export products to Excel:

1. Follow the steps above to search for the products you wish to export.
2. Select the "Export to Excel" button. The page will redraw and you will see a message that the export is proceeding.

Articles in this section

Find Products
Find Ensembles
Product Updates
Ensemble Updates
Product Export

See also

Products
Ensembles
Categories
Catalogs
Refinements
Product Types
Attribute Groups
Workflow Management
Automated Categories

Home > Site Manager by the Section > Product Catalog > Global Product Updates > Find Products

Find Products

The Find Products tab allows you to build a search condition to locate the products you are interested in, and to then search for the products. In the set of products returned from the search, you select specific products to update.

Search conditions are built by selecting a product field, a comparator, and a value to use in the search. The product field is the product information that will be searched, the value is the content of the field that you are interested in, and the comparator defines the relationship between the field and the value. A sample search condition is "Product name" "Includes" "Shirt", where "Product name" is the product field, "Includes" is the comparator", and "Shirt" is the value. Some comparators such as "Is true" or "Is false" do not require values.

Multiple search conditions can be combined to form complex search rules.

Search Condition: This box contains the tools to use to build the search condition to find the products that will be updated.

- **Product Field**: Select the product field to be used in the search from the first drop-down box.
- **Comparator**: Select the comparison value from the second drop-down box. The comparator is used to define how the field selected in the "Product Field" drop-down compares to the contents of the "Value" field.
- **Value**: Enter the value being searched against in the third field. This field will not appear if the selections made in the "Product Field" and "Comparator" drop-downs do not require a value.
- "**+**" (plus sign): Select the "+" (plus) sign if you want to define another search condition for the search. If more than one search condition is created, the search will return products that fit all of the search conditions. For example, if one search condition is defined for product names with "shirt" in them and a second is defined for products that are active, the results returned will be limited to products with the word "shirt" in their name that are also active.
- "-" (minus sign): Select the "-" (minus) sign if you want to remove a search condition.
- **Clear All**: Select this button if you wish to remove all of the search conditions you have defined.
- **Find Products**: Select this button if you wish to search for products using the search conditions you have defined.

After the product search is executed, the page will redraw and the following fields will appear at the bottom of the page:

Show Thumbnails: Select/deselect this checkbox to include/exclude the product thumbnail images in the "Thumbnails" column.

Update Selected: Select this button to begin the process of updating the selected products. The Product Updates tab will appear. Make your updates on that tab and save them.

Export Selected: Select this button to export information about the selected products. The page will refresh and the Product Export information will appear. Follow the instructions on the Product Export tab to export the product information.

Search results grid: This grid contains the list of products that were found in the search.

- **Product Id**: This column contains the ID of the product.
- **Style #**: This column contains the style number of the product.
- **Product Name**: This column contains the name of the product.
- **Thumbnails**: This column contains the thumbnails of the products if the "Show Thumbnails" checkbox is selected or icons that will display the thumbnails when the mouse hovers over the icon.
- **DC Inventory**: This column contains the inventory amount in the DC (Distribution Center) for the product.
- **Store Inventory**: This column contains the inventory amount of the product in stores.
- **Active**: Select/deselect this checkbox to activate/deactivate the product. Inactive products will not appear on the website.
- **Edit**: Select this icon to edit the product. The Product Updates tab appears. Make your updates on that tab and save them.
- **Delete**: Select this icon to remove the product from the website.
- **Check box or Select All**: Select the checkboxes in this column or select the "Select All" button to select every product returned in the search.

See also

Find Ensembles
Product Updates
Ensemble Updates
Product Export

Find Ensembles

The Find Ensembles tab allows you to build a search condition to locate the ensembles you are interested in, and to then search for the ensembles. In the set of ensembles returned from the search, you select specific ensembles to update.

Search conditions are built by selecting an ensemble field, a comparator, and a value to use in the search. The ensemble field is the ensemble information that will be searched, the value is the content of the field that you are interested in, and the comparator defines the relationship between the field and the value. A sample search condition is "Ensemble name" "Includes" "Shirt", where "Ensemble name" is the ensemble field, "Includes" is the comparator", and "Shirt" is the value. Some comparators such as "Is true" or "Is false" do not require values.

Multiple search conditions can be combined to form complex search rules.

Search Condition: This box contains the tools to use to build the search condition to find the ensembles that will be updated.

- **Ensemble Field**: Select the ensemble field to be used in the search from the first drop-down box.
- **Comparator**: Select the comparison value from the second drop-down box. The comparator is used to define how the field selected in the "Ensemble Field" drop-down compares to the contents of the "Value" field.
- **Value**: Enter the value being searched against in the third field. This field will not appear if the selections made in the "Ensemble Field" and "Comparator" drop-downs do not require a value.
- "**+**" (plus sign): Select the "+" (plus) sign if you want to define another search condition for the search. If more than one search condition is created, the search will return ensembles that fit all of the search conditions. For example, if one search condition is defined for ensemble names with "shirt" in them and a second is defined for ensembles that are active, the results returned will be limited to ensembles with the word "shirt" in their name that are also active.
- "-" (minus sign): Select the "-" (minus) sign if you want to remove a search condition.
- **Clear All**: Select this button if you wish to remove all of the search conditions you have defined.
- **Find Ensembles**: Select this button if you wish to search for ensembles using the search conditions you have defined.

After the ensemble search is executed, the page will redraw and the following fields will appear at the bottom of the page:

Show Thumbnails: Select/deselect this checkbox to include/exclude the ensemble thumbnail images in the "Thumbnails" column.

Update Selected: Select this button to begin the process of updating the selected ensembles. The Ensemble Updates tab will appear. Make your updates on that tab and save them.

Search results grid: This grid contains the list of products that were found in the search.

- **Ensemble Id**: This column contains the ID of the ensemble.
- **Ensemble Name**: This column contains the name of the ensemble.
- **Ensemble Code**: This column contains the code of the ensemble.
- **Thumbnails**: This column contains the thumbnails of the ensembles if the "Show Thumbnails" checkbox is selected or icons that will display the thumbnails when the mouse hovers over the icon.
- **Active**: Select/deselect this checkbox to activate/deactivate the ensemble. Inactive ensembles will not appear on the website.
- **Edit**: Select this icon to edit the ensemble. The Ensemble Updates tab appears. Make your updates on that tab and save them.
- **Delete**: Select this icon to remove the ensemble from the website.
- **Check box or Select All**: Select the checkboxes in this column or select the "Select All" button to select every ensemble returned in the search.

See also

Find Products
Product Updates
Ensemble Updates
Product Export

Product Updates

Use the Product Updates page to make modifications to multiple products.

Product Information: This summary box contains information for all of the products being modified.

- **Active**: Select or deselect this checkbox to activate or deactivate the selected product(s). Inactive products will not appear on the web site.
- **Product Id**: This field contains the internal ID of the product. This field is only available when updating a single product and is not modifiable.
- **Product Name**: This field contains the name of the product. This field is only available when updating a single product and is not modifiable.
- **Style #**: This field contains the style number of the product. This field is only available when updating a single product and is not modifiable.
- **Start Date**: Enter a start date in the edit field, or use the calendar icon to select a start date. Products will not be available for display on the web site until after their start date has passed.
- **End Date**: Enter an end date in the edit field, or use the calendar icon to select an end date. Products will not be available for display on the web site once their end date has passed.
- **Variant 1**: Use this drop-down list box to select the first variant choice that will appear on the product page for the product(s).
- **Variant 2**: Use the drop-down list box to select the second variant choice that will appear on the product page for the product(s).
- **Product Template**: Use the drop-down list box to select the product template to be used for the product page for the product(s).
- **Show Swatches**: Use the drop-down list box to select whether or not product swatches will be shown for the product(s).
- **Gift Wrap Available**: Use the drop-down list box to select whether or not gift wrapping will be available for the product(s).
- **Exclude From**: Use the following drop-down list boxes to select whether or not to exclude the product(s) from discounts.
  - **Order Discounts**: Use the drop-down list box to select whether or not to exclude the product(s) from order discounts.
  - **Shipping Discounts**: Use the drop-down list box to select whether or not to exclude the product(s) from shipping discounts.
  - **Item Discounts**: Use the drop-down list box to select whether or not to exclude the product(s) from item discounts.

Product Group: This summary box contains information on the product group the product(s) is assigned to.

- **Name**: Enter the name of the product group in the text entry field.

Categories: This summary box contains information that allows you to add or remove the product(s) from categories.

- **Find Categories**: Select this button to find the categories that you are adding or removing the product(s) from. A pop-up window will appear. In the pop-up window, select categories by doing one of the following:
  - Enter the name of the category in the text edit field and select "Find". In the list of categories that appear, select the "Select" checkbox for each category you want to work with. Each time a checkbox is selected, the category will be added to the list on the "Product Updates" tab. Close the window when you have selected all the categories needed.
  - Select "View all Categories". Expand the category tree until the category you are interested in is visible. Select the category. Each time a category is selected, it will be added to the list on the "Product Updates" tab. Close the window when you have selected all the categories needed.
- **Add To/Remove from Categories List**: This list box is populated with the categories the product(s) belongs to, as well as those selected with the "Find Categories" button. Product(s) can be added to or removed from categories in this list.
  - **Add**: Select this checkbox to add the product(s) to the category.
  - **Delete**: Select this checkbox to remove the product(s) from the category.

Save Updates: Select this button to save the modifications made on this page. No modifications will be saved until this button is selected.

See also

Find Products
Find Ensembles
Ensemble Updates
Product Export

Home > Site Manager by the Section > Product Catalog > Global Product Updates > Ensemble Updates

Ensemble Updates

Use the Ensemble Updates page to make modifications to multiple ensembles.

Ensemble Information: This summary box contains information for all of the ensembles being modified.

- **Active**: Select or deselect this checkbox to activate or deactivate the selected ensemble(s). Inactive ensembles will not appear on the web site.
- **Ensemble Id**: This field shows the internal ID of the ensemble. This field is only available when updating a single ensemble and is not modifiable.
- **Ensemble Name**: This field shows the name of the ensemble. This field is only available when updating a single ensemble and is not modifiable.
- **Ensemble Code**: This field show the code of the ensemble. This field is only available when updating a single ensemble and is not modifiable.
- **Start Date**: Enter a start date in the edit field, or use the calendar icon to select a start date. Ensembles will not be available for display on the web site until after their start date has passed.
- **End Date**: Enter an end date in the edit field, or use the calendar icon to select an end date. Ensembles will not be available for display on the web site once their end date has passed.
- **Ensemble Template**: Use the drop-down list box to select the ensemble template to be used for the ensemble page for the ensemble(s).

Categories: This summary box contains information that allows you to add or remove the ensemble(s) from categories.

- **Find Categories**: Select this button to find the categories that you are adding or removing the ensemble(s) from. A pop-up window will appear. In the pop-up window, select categories by doing one of the following:
  - Enter the name of the category in the text edit field and select "Find". In the list of categories that appear, select the "Select" checkbox for each category you want to work with. Each time a checkbox is selected, the category will be added to the list on the "Ensemble Updates" tab. Close the window when you have selected all the categories needed.
  - Select "View all Categories". Expand the category tree until the category you are interested in is visible. Select the category. Each time a category is selected, it will be added to the list on the "Ensemble Updates" tab. Close the window when you have selected all the categories needed.
- **Add To/Remove from Categories List**: This list box is populated with the categories the ensemble(s) belong to, as well as those selected with the "Find Categories" button. Ensemble(s) can be added to or removed from categories in this list.
  - **Add**: Select this checkbox to add the product(s) to the category.
  - **Delete**: Select this checkbox to remove the product(s) from the category.

Save Updates: Select this button to save the modifications made on this page. No modifications will be saved until this button is selected.

See also

Find Products
Find Ensembles
Product Updates
Product Export

Product Export

Use the Product Export page to export information on the products selected in the Find Products tab.

Product Export: This summary box contains the controls for exporting the products selected in the Find Products tab.

- **Dataset**: Use this drop-down list box to select the type of information you wish to export.
- **Export**: Select this button to begin the export.
- **Cancel**: Select this button to cancel and return to the Find Products tab.

See also

Find Products
Find Ensembles
Product Updates
Ensemble Updates

Home > Site Manager by the Section > Product Catalog > Product Types

Product Types

Use this page to manage the product types defined for the site. You may create new types, edit or remove existing types, and activate or deactivate types.

Product types have attribute groups associated with them. When a product is associated with a specific product type, the product then has access to each of the attributes in the product type's associated asset groups. Values can be set for these attributes for each product they are associated with. This provides a way to specify additional information for a product without requiring that every product on the site share the same information.

For additional information on using product types, attribute groups, and attributes, see Creating Dynamic Attributes.

To create a new product type:

1. Enter the name of the new product type in the "Create a Product Type" tab.
2. Select "Create a Product Type". The page will redraw.
3. If the product type is to be immediately available, select the "Active State" checkbox on the "Attributes" tab.
4. If you modified the active state, save that change by selecting "Update product type info".
5. If adding a root attribute group to the product type, select the "Root Attribute Groups" tab.
6. Select "Add a Root Attribute Group". A new window will appear.
7. To find an attribute group, enter its name in the text box and select "Find". To view all attribute groups, select "View All Attribute Groups". A list of attribute groups will appear.
8. Select the "Select" checkbox to the right of the attribute group that you want to add to your product type. The attribute group will be removed from the list and added to the list on the "Root Attribute Groups" tab.
9. Continue selecting attribute groups until you have chosen all the groups you want to add.
10. Close the attribute group selection window.
11. To activate the attribute group(s) you chose, select the "Active" checkbox for each attibute group that is to be active.
12. Select "Back to Product Type List" to return to the list of product types.

To edit a product type:

1. In the list of product types, select the "Edit" icon for the product type you wish to edit. The page will redraw.
2. To change the active state of the product type, check/uncheck the "Active State:" checkbox.
3. To change the name of the product type, enter a new name in the "Name" text box.
4. Select "Update product type info" to save your changes.
5. Select the "Root Attribute Groups" tab to modify the root attribute groups for the product type.
6. To add a root attribute group, select "Add a Root Attribute Group". A new window will appear.
   - To find an attribute group, enter its name in the text box and select "Find". To view all attribute groups, select "View All Attribute Groups". A list of attribute groups will appear.
   - Select the "Select" checkbox to the right of the attribute group that you want to add to your product type. The attribute group will be removed from the list and added to the list on the "Root Attribute Groups" tab.
   - Continue selecting attribute groups until you have chosen all the groups you want to add.
   - Close the attribute group selection window.
   - To activate the attribute group(s) you chose, select the "Active" checkbox for each attibute group that is to be active.
7. To edit a root attribute group, select the "Edit" icon for the attribute group you wish to edit. A new "Root Attribute Groups" tab will appear. Make changes in that tab as needed.
8. To activate a root attribute group, select the "Active" checkbox for that group.
9. To deactivate as root attribute group, deselect the "Active" checkbox for that group.
10. To remove a root attribute group, select the "Remove" icon for that group. A warning message will appear. Select "Yes".

To activate a product type:

1. Select the "Active" checkbox for the product type you are activating.

To deactivate a product type:

1. Deselect the "Active" checkbox for the product type you are deactivating.

To remove a product type:

1. Select the "Remove" icon for the product type you are removing. A warning message will appear. Select "Yes".

See also

Products
Ensembles
Categories
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Global Product Updates
Attribute Groups
Workflow Management

Automated Categories

Home > Site Manager by the Section > Product Catalog > Attribute Groups

Attribute Groups

Use this page to view, edit, and add attribute groups for the site. Attribute groups define sets of attributes that are used to provide additional information about products. The value of an attribute will likely vary between products and/or product variants (SKUs).

After an attribute group is defined, it is associated with a Product Type. While editing a product, you can then set values for the attributes in the attribute group by:

- selecting the Dynamic Attributes tab of the product (for a non-international site), or the Locales tab of the product (for an international site), then selecting the corresponding product type. This will allow you to set attributes defined at the product level.
- selecting the Variants tab, then selecting "Add Dynamic Attributes". This will allow you to set attributes defined at the variant (SKU) level.

For additional information on working with attribute groups, product types, and products, see Creating Dynamic Attributes.

To view attribute groups by hierarchy:

1. In the "Attribute Group Hierarchy" tab, use the drop-down list box to select the product type hierarchy you want to view.
2. Select "View Attribute Groups". The attribute groups in that hierarchy will be displayed beneath the tab box.

To view all attribute groups:

1. Select the "Find an Attribute Group" tab.
2. Select "View All Attribute Groups". The attribute groups will be displayed beneath the tab box.

To find an attribute group:

1. Select the "Find an Attribute Group" tab.
2. Enter the name of the attribute group you are searching for in the entry field.
3. Select "Find". Any attribute groups matching the name entered will be displayed beneath the tab box.

To edit an attribute group:

1. Follow one of the steps above to find the attribute group you wish to edit.
2. Select the "Edit" icon for the attribute group. The page will refresh.
3. On the "Attributes" tab:
   - Select or deselect the "Active" checkbox to activate or deactivate the attribute group.
   - Modify the attribute group name in the "Attribute Group Name" entry field.
   - Select "Save Attributes" to save your changes.
4. On the "Sub Attribute Groups" tab:
   - To edit a sub-attribute group, select the name of the group or the "Edit" icon. A new tab page will appear. Make the desired changes on the new page.
   - Select or deselect the "Active" checkbox to activate or deactivate the sub-attribute group.
   - Select the "Delete" icon to delete the sub-attribute group.
   - Select "Add a Sub Attribute Group" to add a new sub-attribute group. A dialog box will appear. Use the controls in the dialog box to find the attribute group you want to add. Select the "Select" icon to add it to the group. When you are done adding groups, close the dialog box.
5. On the "Product Attributes" tab:
   - Create a new product attribute by entering a name for it in the "Name" entry field and selecting "Save". The new attribute will appear below the tab box.
   - To change the name of a product attribute, select the "Edit" icon. The name will appear in the "Name" text field. Modify the name and select "Save".
   - Select or deselect the "Active" checkbox to activate or deactivate a product attribute.
   - Select the "Delete" icon to remove a product attribute. A message box will appear to confirm the removal. Select "Yes".
6. On the "Locales" tab you can modify the locales the attribute group will be valid for. This tab will reflect the locales selected when the attribute group was created.
   - To add a locale to the attribute group, select the locale in the "Unselected Locales" list box. Select "<- Add Locale". The locale will be moved to the "Selected Locales" list box.
   - To remove a locale for the attribute group, select the locale in the "Selected Locales" list box. Select "-> Remove Locale". The locale will be moved to the "Unselected Locales" list box.

To activate or deactivate a product group:

1. Follow the steps to find an attribute group for the attribute group you are modifying.
2. Select or deselect the "Active" checkbox for that group.

To remove an attribute group:

1. Follow the steps to find an attribute group for the attribute group you are removing.
2. Select the "Delete" icon for the group. A message box will appear to confirm the removal. Select "Yes".

To add a new attribute group:

1. Select the "Create an Attribute Group" tab.
2. Enter the name of the new attribute group in the text field.
3. If the site is an international site, select the locales the attribute group will be available for in the "Use in Locale(s)" multiple selection list box. Use the "Ctrl" key to select multiple locales.
4. Select "Create Attribute Group". The page will redraw.
5. Follow the steps for editing an attribute group to enter new information for the new attribute group.

Articles in this section

Attributes

Sub Attribute Groups

Product Attributes

Locales

See also

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Attributes

The Attributes tab allows you to manage the basic attributes for the current attribute group.

Active: This checkbox indicates whether or not the current attribute group is available for use on the website. Select or deselect the checkbox to activate or deactivate the attribute group.

Attribute Group Information: This summary box contains additional information about the attribute group.

- **Attribute Group Name**: The name is how the attribute group will be referred to throughout the Site Manager. The attribute group name is a required field.
- **Define At**: The define at options determine how an attribute is associated with a product.
  - **Product level**: Attributes defined at the product level appear on the Specifications tab when the product is viewed on the website. For additional information on setting values for product level attributes, see Dynamic Attributes.
  - **SKU level**: Attributes defined at the SKU (variant) level appear as an "additional specification" when the product is displayed on the web site. For additional information on setting values for SKU (variant) level attributes, see Variants.

Save Attributes: This button saves the modifications made to this tab. No modifications will be saved until this button is selected.

See also

Sub Attribute Groups
Product Attributes
Locales

Home > Site Manager by the Section > Product Catalog > Attribute Groups > Sub Attribute Groups

Sub Attribute Groups

The Sub Attribute Groups tab allows you to manage any sub attribute groups of the current attribute group. Sub attribute groups are other attribute groups that contain attributes that you want to combine with the attributes being defined for the current attribute group. When associated with a product, attributes defined in a sub attribute group are indistinguishable from attributes defined in the current attribute groups. Attributes defined in a sub attribute group appear at the same level, product or variant (SKU), as they were defined at.

Sub Attribute Group List: This list includes all of the sub attribute groups of the current attribute group. Select the "Edit" icon to edit a sub attribute. Select or deselect the "Active" checkbox to activate or deactivate the sub attribute group. Inactive attribute groups will not be available for use on the website. Select the "Delete" icon to remove a group.

Add a Sub Attribute Group: This button will allow you to add a new sub attribute group to the current attribute group. A pop-up window will appear that will allow you to search for and select the attribute group to be added.

See also

Attributes
Product Attributes
Locales

Home > Site Manager by the Section > Product Catalog > Attribute Groups > Product Attributes

Product Attributes

The Product Attributes tab allows you to manage the product attributes that are part of the current attribute group. Each product attribute can be assigned a value for a specific product, and will then be displayed on the product's page on the website.

Product Attribute Information: This summary box allows you to create a new product attribute.

- **Name**: Enter the name of the new product attribute in this text entry field.
- **Create**: Select this button to create the new product attribute. The page will refresh and you will find fields that can be filled in to define the product attribute.
- **Cancel**: Select this button to clear the contents of the "Name" text entry field.

Product Attribute List: This list is the list of product attributes that are in the current product attribute group. Activate or deactivate a product attribute by selecting or deselecting the "Active" checkbox. Inactive product attributes are not available for use on the website. Edit a product attribute by selecting the "Edit" icon. Remove a product attribute by selecting the "Delete" icon.

Articles in this section

Edit Product Attribute

See also

Attributes
Sub Attribute Groups
Locales

Home > Site Manager by the Section > Product Catalog > Attribute Groups > Product Attributes > Edit Product Attribute

Edit Product Attribute

The Edit Product Attribute screen allows you to modify the way that a product attribute appears.

Active: This checkbox indicates whether or not the current attribute is available for use on the website. Select or deselect the checkbox to activate or deactivate the attribute.

Product Attribute Information: This summary box contains the information that can be configured for the attribute.

- **Product Attribute ID**: A read-only field, this shows the internal identifier of the attribute.
- **Name**: This entry field contains the name that the attribute will be referred to within the Site Manager. This is a required field.
- **Input Type**: The input type options define the type of information that is allowed as a value for the attribute.
    - **Allow only numeric values**: The only characters permitted as values for the attribute are 0...9.
    - **Allow alphanumeric values**: The characters permitted as a value for the attribute include a...z, A...Z, and 0...9.
    - **Use numeric sort value**: This field indicates that a numeric sort value can be entered for the attribute when it is associated with a product. The numeric sort value will be used when all the attributes associated with the product are sorted and then displayed on the web site.
- **Required for each product**: This field indicates that a value is required for this attribute for every product the attribute is associated with.
- **Entry Instructions**: This text field contains instructions that will be displayed to the Site Manager administrative user when they are entering a value for the attribute, after is has been associated with a product. Entry instructions should include a description of the type of information that is expected as the value for the attribute.

Save: Select this button to save the changes made on this screen.

Locales

The Locales tab allows you to modify the locales that the attribute group is available for. This tab is only available on international sites. Modifications made on this tab are effective immediately.

Locale Information: This non-editable summary box contains information on the locales the attribute group is available for. The information in these fields is updated as modifications are made on this tab.

- **Name**: The name of the attribute group that is being edited.
- **Language**: The language(s) of the locale(s).
- **Country:** The country/countries the locale(s) is/are valid for.
- **Currency**: The currency/currencies used in the locale(s).

Selected Locales: This list box contains the list of locales that the attribute group is available for.

Unselected Locales: This list box contains the list of locales that the attribute group is not available for.

Add Locale: Select this button to move a selected locale from the "Unselected Locales" list box to the "Selected Locales" list box.

Remove Locale: Select this button to move a selected locale from the "Selected Locales" list box to the "Unselected Locales" list box.

See also

Attributes
Sub Attribute Groups
Product Attributes

Workflow Management

Use this page to view, edit, and manage products and ensembles and their workflow statuses.

To find entities:

1. Select the "Entity Type" radio button that represents the type of entity you wish to find.
2. In the "Status" drop-down list box, select the status you wish to find.
3. In the "Last Modified By" drop-down list box, select the name of the user who last modified the item(s).
4. In the "Release Date" area, use the drop-down list box to select the condition to apply to release dates, then either use the calendar icon to select a release date or manually enter the release date in the text field.
5. Select "Find". The list of entities that match the search criteria will be displayed at the bottom of the page.

To change the workflow status of an entity:

1. Find the entity you wish to change workflow status for.
2. In the "Workflow Status" column, select the drop-down list box to display the available status(es).
3. Select the new status the entity should have.
4. If changing the status of more than one entity, repeat the above steps until all the status has been updated for all of them.
5. Select "Save Changes" when all the status(es) have been updated.

To preview an entity:

1. Find the entity you wish to preview.
2. Select the "Preview" icon to the left of the entity.
3. A new window will appear, which will display the product as it is currently scheduled to appear.

To modify the attributes of an entity:

1. Find the entity you wish to preview.
2. Select the "Product ID" of the entity. A new tab will open, which will display the attributes of the entity.
3. Make changes to the entity as necessary.

See also

Products
Ensembles
Categories
Catalogs
Refinements
Global Product Updates
Product Types
Attribute Groups
Automated Categories

Home > Site Manager by the Section > Product Catalog > Automated Categories

Automated Categories

Use this page to view and tailor the automated categories defined for the web site. Automated categories are categories that have a dynamic set of items included in them. Items move in and out of the categories based on the rules of each category, with no manual intervention required.

To view the items currently in an automated category:

1. Select the edit icon to the right of the category. The page will refresh and tabs for "View Automated Category" and "Display Settings" will appear.
2. On the "View Automated Category" tab, use the drop-down list boxes to select the search criteria for items.
3. Select "Find". A listbox containing all of the items matching the search criteria will appear on the bottom of the page.

To modify the number of items that can be displayed in an automated category:

1. Select the edit icon to the right of the automated category. The page will refresh and the tabs for "View Automated Category" and "Display Settings" will appear.
2. Select "Display Settings".
3. In the "Number of Products" drop-down listbox, select the maximum number of products that should be in the category.
4. Select "Save".

To modify the appearance of an automated category as a link in the website's header:

1. Select the edit icon to the right of the automated category. The page will refresh and the tabs for "View Automated Category" and "Display Settings" will appear.
2. Select "Display Settings".
3. To have the category appear as a link in the website's header, select the "Display" checkbox to the right of "Site Wide > ". To remove the category's link from the website's header, deselect the "Display" checkbox to the right of "Site Wide > ".
4. Select "Save".

To modify the categories that the automated category will appear as a sub-category for:

1. Select the edit icon to the right of the automated category. The page will refresh and the tabs for "View Automated Category" and "Display Settings" will appear.
2. Select "Display Settings".
3. In the "Site Section/Category" listbox, select each category the automated category should appear as a sub-category of. Deselect each category the automated category should not appear as a sub-category of.
4. Select "Save".

Articles in this section

View Automated Category

Display Settings

See also

Products
Ensembles
Categories
Catalogs
Refinements
Global Product Updates
Product Types
Attribute Groups
Workflow Management

View Automated Category

The View tab allows you to see the products that will appear in the category on the website.

Date Range: This drop-down list box contains a list of date ranges to select from when viewing products. This list box is not available for all automated categories.

Category: This drop-down list box contains the list of categories that are active for the current site.

Find: This button will perform a search of products, using the date range selected in the "Date Range" drop-down list box (if available) and the category selected in the "Category" drop-down list box. The results of the search will appear in a list in the lower portion of the page.

Product List: This list contains the list of products, using the criteria selected in the "Date Range" (if available) and "Category" drop-down list boxes. Items in the list may be edited by selecting their name.

See also

Display Settings

Display Settings

The Display Settings tab allows you to manage how the products in the automated category are displayed on the website.

Number of Products: This drop-down list box contains a number of selections for the number of products that can be displayed on a top seller page.

Date Range: This drop-down list box contains a number of date selections for the time period that should be used to determine top selling products. This drop-down list box is not available for some automated categories.

Site Wide Display: This checkbox indicates whether or not the automated category will be displayed as a link in the page headers of the website.

Site Section/Category: This list contains the list of root categories for the site. Select or deselect the "Display" checkbox for any root category that should or should not display the automated category.

Save: This button saves the modifications on this tab to the database. No modifications will be saved until this button is selected.

See also

View Automated Category

Content

The Content section of the Site Manager allows you to manage the non-product content that appears on the web site. You can schedule new content, manage the formats used for content, and manage the media used.

Articles in this section

Sections and Pages
Site Preview
Find Content
Formats
Upload Media
Site Configurations
Vanity URLs
Email Templates
Additional Sitemap Entries
Locales & Languages

See also

Product Catalog
Experiences
Search
Customer Service
Reporting
Users and Roles
System Tools

Home > Site Manager by the Section > Content > Sections and Pages

Sections and Pages

Use this page to manage the sections and pages for the site.

To create a new section:

1. Enter the name of the new section in the text box in the "Create a New Site Section" tab box.
2. Select "Create Site Section". The page will refresh and your section will be included in the "Site Sections" list.

To edit a section:

1. Locate the section you wish to modify.
2. Select the name in "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. Select the "Pages" tab to manage the pages and page content for the section.
4. Select the "Details" tab to modify the details for the section. Select "Save Details" to save your changes.
5. Select "Back to Section List" to return to the previous page.

To change a section's name or description:

1. Locate the section you wish to modify.
2. Select the name in "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. Select the "Details" tab. Make the necessary changes to the "Name" and "Description" sections.
4. Select "Save Details" to save your changes.
5. Select "Back to Section List" to return to the previous page.

To delete a section:

1. Choose the section you wish to delete.
2. Select the "Delete" icon to the right of the section name.

The following set of instructions refer to working with an individual page in a section and the page's attributes.

To update a page's internal name, JSP filepath, or area display:

1. Locate the section containing the page you wish to modify.
2. Select the name in "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. On the "Pages" tab, use the "Find a Page" tab to locate the page you wish to edit. Select the page. A new tab will appear and will be named after your page (see Individual Pages for additional information).
4. On the new tab for your page, select the "Details" tab.
    - To change the internal name of the page, enter a new name in the "Label" field. This is the name that will be used in Site Manager to refer to this page.
    - To change the JSP filepath for the page, enter a new filepath in the "Path" field. Care should be taken when changing this field, as engineering changes will also be needed to make sure the page is located in the new filepath.   Reminder: page paths use the following naming scheme:
        - Site Section: catalog/section.jsp?categoryId=
        - Category page: /catalog/category.jsp?categoryId=
        - Subcategory page: /catalog/thumbnail.jsp?categoryId=
    - To change the area display, enter new information in the "Page Area Display" field. The "Page Area Display" field contains the text that renders the graphical presentation of the different areas on the page on the "Areas" tab. Making changes to this field will modify what is displayed on that tab.
5. Select "Save Details" to save your changes.
6. Select the "Sections & Pages" tab to return to the sections tab.

To update a page's search engine optimization title, keywords, or description:

1. Locate the section containing the page you wish to modify.
2. Select the name in "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. On the "Pages" tab, use the "Find a Page" tab to locate the page you wish to edit. Select the page. A new tab will appear and will be named after your page (see Individual Pages for additional information).
4. On the new tab for your page, select the "SEO" tab.
5. If your site is an international site, select the language and the country that you are making updates for.
6. Enter your changes for the title, keywords and/or description for the page.
7. Select "Save" to save your changes.
8. Select the "Sections & Pages" tab to return to the sections tab.

To preview the content on a page:

1. Locate the section containing the page you wish whose content you wish to preview.

2. Select the name in "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. On the "Pages" tab, use the "Find a Page" tab to locate the page you wish to edit. Select the page. A new tab will appear and will be named after your page (see Individual Pages for additional information).
4. On the new tab for your page, select the "Preview" tab.
5. If your site is an international site, select the language and country that corresponds to the content you wish to preview.
6. The "Preview" tab displays a calendar with links for each day that the page is scheduled to appear. Days that are scheduled to have new content start on them will have either the word "Approved" or the word "Pending" on them, depending upon the status of the content. Select the day or the word "Approved" to view the page with approved content for that day. Select the word "Pending" to view the page with the pending content for that day.
7. A new window appears which displays the page with content of the status that you chose. On the new window you can toggle between viewing approved content and pending content. The new window also contains a calendar on it and you may select another day on it if you want to view the page on a different day.
8. Close the preview window when you are done previewing the page.
9. Select the "Sections & Pages" tab to return to the sections tab.

The following set of instructions refer to working with an area on a page.

To update the name, description, or pages associated with an area:

1. Locate the section containing the page you wish to modify.
2. Select the name in the "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. On the "Pages" tab, use the "Find a Page" tab to locate the page you wish to edit. Select the page. A new tab will appear and will be named after your page(see Individual Pages for additional information).
4. On the "Areas" tab, select the "Configure" icon for the area you want to modify. The page will refresh and you will see the details of the area you choose. When selecting an area to edit, keep in mind the naming rules for areas. Areas that end in "-Tablet" display content only on tablet devices, areas that end in "-Mobile" display content only on mobile devices, and areas that end with neither display content on all three devices: desktop, tablet, and mobile.
5. Modify the fields on this tab as necessary.
   - Select or deselect the "Supports Targeted Content" checkbox to permit or prohibit targeted content in the area.
   - To change the name of the area, enter new information in the "Name" field. This is the name that will be used for this area in Site Manager. Changing the name of an area may affect where the content in the area appears. Areas that end in "-Tablet" display content only on tablet devices, areas that end in "-Mobile" display content only on mobile devices, and areas that end with neither display content on all three devices: desktop, tablet, and mobile.
   - To change the description of this area, enter a new description in the "Description" field. This description will be used in Site Manager.
   - To change the pages this area appears on, select "Add" or "Remove" to move pages between the "Associated Pages" and "Pages Not Associated" lists. Take care when making these changes, as engineering changes will also be required to make the changes take full effect.
6. Select "Save Details" to save your changes.
7. Select "All Areas" to return to the list of areas for the page, or select the "Sections & Pages" tab to return to the list of pages for the section.

To create a new area on a page:

1. See your system administrator to add a new area to a page, as engineering changes are also required.

To add or remove targeted content support for an area on a page:

1. Locate the section containing the page you wish to modify.
2. Select the name in the "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. On the "Pages" tab, use the "Find a Page" tab to locate the page you wish to edit. Select the page. A new tab will appear and will be named after your page (see Indivitual Pages for additional information).
4. On the "Areas" tab, select the "Configure" icon for the area you want to modify. The page will refresh and you will see the details of the area you choose.
5. Select or deselect the "Supports Targeted Content" checkbox to add or remove targeted content support for the area.
6. Select "Save Details" to save your changes.
7. Select "All Areas" to return to the list of areas for the page, or select the "Sections & Pages" tab to return to the list of pages for the section.

The following set of instructions refer to working with content on a page.

To schedule new content on a page:

1. Locate the section containing the page that you want to schedule new content for.
2. Select the name in the "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. On the "Pages" tab, use the "Find a Page" tab to locate the page you wish to edit. Select the page. A new tab will appear and

will be named after your page (see Individual Pages for additional information).
4. On the "Areas" tab for the page, select the name of the area or the "Edit" button of the area where you want to schedule new content. (When selecting an area to edit, keep in mind the naming rules for areas. Areas that end in "-Tablet" display content only on tablet devices, areas that end in "-Mobile" display content only on mobile devices, and areas that end with neither display content on all three devices: desktop, tablet, and mobile.) The page will refresh.
5. If the site is an international site, select the language that will be used for the new content. The page will refresh.
6. If the site is an international site, select the country the new content will be valid for.
7. Select the "Schedule New Content" button. The page refreshes.
8. Select the date the new content should start on.
9. Select the type of content you want to schedule. The page will refresh and a "Format" drop-down will appear.
10. In the "Format" drop-down, select the format you want to use for this instance of the content. If you are unsure of the format you want, select the "View Format Examples" button. A new window will open with sample images of the formats available for this type of content.
11. Once the format is selected, the page will refresh and the "Asset Options" area will fill in with the fields that will allow you to create your content. Different fields will appear based on the type of content you chose to create. Fill in each field as appropriate for your content.
12. Select the "Save" button at the top of the "Asset Options" area to save your content. You content will be saved and scheduled to appear. The page will refresh and you will see a listing for your new content.
13. Select "All Areas" to return to the list of areas for the page, or select the "Sections & Pages" tab to return to the list of pages for the section.

Cloning content is a shorthand way of repeating content that has previously appeared on a page and having it appear again. To clone content on a page:

1. Locate the section containing the page that has content you wish to clone.
2. Select the name in the "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. On the "Pages" tab, use the "Find a Page" tab to locate the page you wish to edit. Select the page. A new tab will appear and will be named after your page (see Individual Pages for additional information).
4. On the "Areas" tab for the page, select the name of the area or the "Edit" button of the area whose content you want to clone. The page refreshes. (When selecting an area to edit, keep in mind the naming rules for areas. Areas that end in "-Tablet" display content only on tablet devices, areas that end in "-Mobile" display content only on mobile devices, and areas that end with neither display content on all three devices: desktop, tablet, and mobile.) The page will refresh.
5. In the "Content Scheduled After" area, enter a date that the content you want to clone appeared on. The page refreshes and a list of the content that appeared in that area after that date appears.
6. Select the "Clone" button of the content you wish to clone. The page refreshes and the content chosen will appear.
7. Select a date and time that the cloned content should begin appearing on.
8. If your site is an international site, select the locale the cloned content will be associated with.
9. Select "Clone Content". The page will refresh and a list of all of the content scheduled to appear after the selected date will appear, with your cloned content in the list.
10. Select "All Areas" to return to the list of areas for the page, or select the "Sections & Pages" tab to return to the list of pages for the section.

To edit the content on a page:

1. Locate the section containing the page you wish to modify.
2. Select the name in the "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. On the "Pages" tab, use the "Find a Page" tab to locate the page you wish to edit. Select the page. A new tab will appear and will be named after your page (see Individual Pages for additional information).
4. On the "Areas" tab for the page, select the name of the area or the "Edit" button of the area whose content you want to change. (When selecting an area to edit, keep in mind the naming rules for areas. Areas that end in "-Tablet" display content only on tablet devices, areas that end in "-Mobile" display content only on mobile devices, and areas that end with neither display content on all three devices: desktop, tablet, and mobile.) The page refreshes.
5. If your site is an international site, select the language of the content you are editing.
6. If your site is an international site, select the country associated with the content you are editing.
7. In the "Content Scheduled After" area, enter a date that the content you want to change will be appearing on. The page refreshes and a list of the content scheduled to appear in that area after that date appears.
8. Select the "Edit" button of the content you wish to change. The page refreshes and the content chosen will appear.
9. Make the necessary changes to the content. If the status of the content is not "WIP" or "Declined", you will first need to change the status to one of those values before you can make changes. What you can change varies by the type of content that you are modifying.
10. Select "All Areas" to return to the list of areas for the page, or select the "Sections & Pages" tab to return to the list of pages for the section.

To change the status of content on a page:

1. Locate the section containing the page that has content you want to change the status for.
2. Select the name in the "Site Sections" or select the "Edit" icon to the right of the name. A new page appears with tabs for "Pages" and "Details".
3. On the "Pages" tab, use the "Find a Page" tab to locate the page you wish to edit. Select the page. A new tab will appear and will be named after your page(see Individual Pages for additional information).
4. On the "Areas" tab for the page, select the name of the area or the "Edit" button of the area whose content you want to change

the status of. (When selecting an area to edit, keep in the naming rules for areas. Areas that end in "-Tablet" display content only on tablet devices, areas that end in "-Mobile" display content only on mobile devices, and areas that end with neither display content on all three devices: desktop, tablet, and mobile.) The page refreshes.

5. If your site is an international site, select the language of the content.
6. If your site is an international site, select the county the content is associated with.
7. You will see a list of all of the content scheduled to appear after the date shown at the top of the tab. Select the "Edit" icon for content whose status you wish to change. The page will refresh.
8. In the "Status" drop-down list, select the status you want to change the content to. Status changes take effect immediately and you do not have to select anything to save your changes. The page will refresh. If you set the working status to "WIP" or "Declined", you will be able to edit the details of content and make changes to it.
9. Select "All Areas" to return to the list of areas for the page, or select the "Sections & Pages" tab to return to the list of pages for the section.

Articles in this section

Pages Details Individual Pages

See also

Site Preview
Find Content
Formats
Upload Media
Site Configurations
Vanity URLs
Email Templates
Additional Sitemap Entries
Locales & Languages

Pages

The Pages tab allows you to manage the pages in the current section.

Find a Page: This tab allows you locate a page defined for the selected section. See Find a Page for additional information.

Create a New Page: This tab allows you to create a new page. Note - engineering work will be needed to create the physical page for the website. See Create a New Page for additional information.

Pages List: This list is the list of pages that were found after a page search. This list also displays the first 25 pages defined for the site when the tab is first opened. Select a page's path or the "Edit" icon to edit a page. See Individual Pages for information on editing pages. Select the "Delete" icon to delete a page.

- **Page Name**: This column contains the names the pages were given when they were created.
- **Page Path**: This column contains the path the pages were given when they were created. The page path can be selected to edit the page.
- **Edit**: Select this icon to edit the page.
- **Delete**: Select this icon to delete the page.

Articles in this section

Find a Page

Create a New Page

See also

Details
Individual Pages

Find a Page

Use the Find a Page tab to locate a managed content page of the web site.

Page Name: Enter the name of the page you are looking for.

Page Path: Enter the context sensitive URL for the page. Reminder: page paths use the following naming scheme:

- Site Section: catalog/section.jsp?categoryId=
- Category page: /catalog/category.jsp?categoryId=
- Subcategory page: /catalog/thumbnail.jsp?categoryId=

Find: Select this button to search for the page based on the search requirements entered. If no search requirements are entered, the search will return all the pages defined for the current section. A list of pages will appear below the tab.

See also

Create a New Page

Home > Site Manager by the Section > Content > Sections and Pages > Pages > Create a New Page

Create a New Page

Use the Create a New Page tab to create a new page for the section.

Page Name: Enter a name for the page. This field is required.

Page Path: Enter the conext-sensitive URL for the page. Page paths use the following naming scheme:

- Site Section: catalog/section.jsp?categoryId=
- Category page: /catalog/category.jsp?categoryId=
- Subcategory page: /catalog/thumbnail.jsp?categoryId=

Your page paths should be named accordingly. This field is required.

Create Page: Select this button to create the page. A new tab will open in the Site Manager with fields for the new page.
See Individual Pages for information on the fields in that tab.

See also

Find a Page

Home > Site Manager by the Section > Content > Sections and Pages > Details

Details

The Details tab allows you to manage the details of the current section.

Section Name: This text entry field contains the name of the section. This is a required field.

Description: This text entry field contains a description of the section. The description should include information on the types of pages that should be included in the section.

Save Details: This button saves the modifications made on this tab. No modifications will be made unless this button is selected.

See also

Pages
Individual Pages

Home > Site Manager by the Section > Content > Sections and Pages > Individual Pages

Individual Pages

Individual pages defined for the website open in a new tab when being edited in the Site Manager. This tab contains subtabs, where information specified to the page can be entered and customized.

Articles in this section

Areas Details SEO Preview

See also

Pages
Details

Home > Site Manager by the Section > Content > Sections and Pages > Individual Pages > Areas

Areas

The Areas tab allows you to manage the areas on the current page.

Create an Area: This summary box contains the controls necessary to create a new area on the current page. Enter a name for the area in the text entry field, then select "Create Area". Area names must be unique across the entire site. (When entering the name for the new area, keep in mind the naming rules for areas. Areas that end in "-Tablet" display content only on tablet devices, areas that end in "-Mobile" display content only on mobile devices, and areas that end with neither display content on all three devices: desktop, tablet, and mobile.) The page will refresh and will contain fields to customize for the new area. Note - engineering work will be required in order to place the new area on a page.

Page Areas: This summary box contains a graphical view of the areas on the page. The view is rendered from the information in the "Page Area Display" field on the Details tab for the page.

Areas List: This list box contains the list of areas defined for the page. Select an area name or the "Edit" icon to examine current content or schedule new content for the area. Select the "Configure" icon to configure the details of the area. Select the "Delete" icon to remove the area.

See also

Details
SEO
Preview

Details

The Details tab contains some of the details for the current page.

Exclude from On-Site Search: Select/deselect this checkbox to include or exclude this page from on-site searches. If selected, the page will not be returned as a match for on-site searches.

Label: This text entry field contains the label for the page.

Path: This text entry field contains the path for the page.

Page Area Display: This text entry field contains the HTML code that creates the "Page Areas" display on the Areas tab.

Save Details: This button saves the modifications made to this tab. No modifications will be saved until this button is selected.

See also

Areas
SEO
Preview

SEO

The SEO tab contains the Search Engine Optimization data for the page.

Language: This field is available only on international sites. Select the language to view SEO details for.

Country: This field is available only on international sites. Select the country to view SEO details for.

Exclude from XML Sitemap: Select this checkbox to exclude the category detail page from the sitemap that is generated for SEO.

Change Frequency: Select a value from this drop-down to indicate how frequently the category detail page is updated. This will be included in the generated sitemap for the site.

Priority: Select a value from this drop-down to indicate how important the category detail page is in comparison to other pages on the site. The higher the number chosen, the higher the importance of the category detail page. This will be included in the generated sitemap for the site.

Title: This text entry field contains the title of the page that should be used for SEO.

Meta Description: This text entry field contains the description that should be associated with the page for SEO. The description is pre-populated as follows:

- For pages associated with B2B sites:
  - Home is set to the PAGE TITLE in Site Manager
  - Site Section is set to the PAGE TITLE in Site Manager
  - Category & Subcategory are set to the CATEGORY NAME
  - Ensemble is set to ENSEMBLE NAME
  - Product is set to PRODUCT NAME
  - Contact Us and Customer Service Template are set to LABEL on the Details tab in Site Manager (LABEL on Detail tab overwrites TITLE on SEO tab on save)
  - Content Page with/without Header & Footer are set to TITLE on the SEO tab in Site Manager (TITLE on SEO tab overwrites LABLE on Details tab on save)
- For pages associated with B2C sites:
  - Home page = Welcome to
  - Site Section Landing Page = at
  - Category, subcategory pages = at
  - Product Details Page = - first 150 characters of product description
  - Ensemble Details Page = - first 150 characters of ensemble description
  - Search Results Page = Keywords:
  - Customer service pages = at
  - Any pages that have managed or targeted content on them = at

Meta Keywords: This text entry field contains the keywords that should be considered as a match for this page. Separate multiple keywords with commas. Meta keywords will appear in the source of the page.

Save: This button saves the modifications made to the tab. No modifications will be saved until this button is selected.

See also

Areas
Details
Preview

Preview

The Preview tab allows you to review the content scheduled to appear on the current page. You can view the page as it appeared on a date in the past, how it currently appears, or how it will appear in the future.

Language: This field is available only on international sites. Select the language of the site you are going to preview.

Country: This field is available only on international sites. Select the country of the site you are going to preview.

Refresh to Display Updates: The calendar indicates which days new content is scheduled to appear. If content updates have been taking place after this tab was opened, selecting this button will refresh the calendar to show those updates,

Content scheduled to appear on: This text entry field, coupled with the calendar icon next to it, can be used to change the month and year of the calendar that is being displayed.

Calendar: The calendar shows the status of all content being scheduled for the current page. To see how the page will appear on a particular day, select the date on the calendar. A pop-up window will appear which will provide you with a preview of the page for the selected date.

See also

Areas
Details
SEO

Site Preview

Use this page to view what the site looks like on a particular date. Dates viewed may be past or present dates.

To view the site:

1. Use the controls to move the calendar to the month you wish to view.
2. Select the date you wish to view. A window will pop-up containing the content for the site on the selected date. You may click around and move to other pages on the site. You may also change the date you are viewing with the date control on the pop-up window.
3. Close the pop-up window when you are done.

See also

Sections and Pages
Find Content
Formats
Upload Media
Site Configurations
Vanity URLs
Email Templates
Additional Sitemap Entries
Locales & Languages

Home > Site Manager by the Section > Content > Find Content

Find Content

Use this page to manage the content defined for the site. You may find, edit, and delete content.

To find content by date:

1. Enter a start date in the "Date" text box.
2. Select "Find Content". A list of matching content will appear below.

To find content by status:

1. Select a status in the "Status:" drop-down list box.
2. Select "Find Content". A list of matching content will appear below.

To find content by locale (available only on international sites):

1. Select one or more locales in the "Used in Locales" list box.
2. Select "Find Content". A list of matching content will appear below.

To view all content:

1. Leave the "Date" text box blank.
2. Do not select a status.
3. Do not select a locale (available on international sites only).
4. Select "Find Content". A list of matching content will appear below.

To edit content:

1. Locate the content you wish to change.
2. Select the "Edit" icon to the right of the content you want to modify. A new page will appear with the information that may be modified for the content. You may change the status of any content, but only content with a status of "Declined" or "WIP" may have its details modified.
   - Use the "Status" drop-down to change the status of the content.
   - Use the "Start Date" field or the calendar control to change the start date of the content.
   - Use the "Format" drop-down to change the format of the content.
   - Select the "Edit Content Details" button to edit the details of the content. The page will refresh with information specific to the type of the content. Make the necessary changes to the content. Some types of content will be updated as soon as you make changes, while other types will require you to select a "Save" or "Update" button to save your changes. After you have made your changes the page will refresh and you will be returned to the modify content page.

To delete content:

1. Locate the content you wish to delete. Note: only content with "WIP" or "Declined" status may be deleted.
2. Select the "Delete" icon to the right of the content you wish to remove. Select "Yes" in the confirmation box that comes up.

See also

Sections and Pages
Site Preview
Formats
Upload Media
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Locales & Languages

Home > Site Manager by the Section > Content > Formats

Formats

Use this page to manage the formats defined for the different asset types in the site. You may add, delete, or edit formats.

To view the formats defined for an asset type:

1. In the "Asset Types" list, located the asset you wish to view.
2. Select the name of the asset in the "Asset Type" column or select the "View Formats" icon to the right of the asset name. A new page appears with a list of all of the formats defined for that asset.
3. Select "Back to Asset Types List" to return to the previous page.

To create a format:

1. Follow the instructions to view the formats for the asset type you are interested in.
2. In the "Create a Format" tab box, enter the name for the format in the "Format Name:" text box.
3. Select "Create Format". A new page will appear with tabs for "Details", "Asset Allocation", and "Default XSL Template".
4. Select the "Details" tab to set the details for the format.
   - Use the "Active" checkbox to activate or deactivate the format.
   - Enter a name for the format in the "Format Name" field.
   - Enter a path and filename in the "Example Image" field for the sample image that should be shown in Site Manager for this format.
   - Enter a description in the "Description" field. The description is used internally within Site Manager.

   Select "Update Format" to save your changes.
5. Select the "Asset Association" tab to associate asset types with the format.
6. Select the "Default XSL Template" tab to enter the XSL template for the format. The XSL template controls the way the content is displayed on the Web site. Select "Update Default Template" to save your changes.
7. Select "Back To Asset Types List" to return to the format list page.

To edit a format:

1. Follow the instructions to view the formats for the asset type you are interested in.
2. In the format list, select the "Name" of the format or select the "Edit" icon to the right of format name. A new page will appear with tabs for "Details", "Asset Association", and "Default XSL Template".
3. Select the "Details" tab to modify the details of the format.
   - Use the "Active" checkbox to activate or deactivate the format.
   - Enter a new name in the "Format Name" field to change the name of the format.
   - Enter a path and filename in the "Example Image" field for the sample image that should be shown in Site Manager for this format.
   - Enter a description in the "Description" field. The description is used internally within Site Manager.

   Select "Update Format" to save your changes.
4. Select the "Asset Association" tab to modify the asset types associated with the format.
5. Select the "Default XSL Template" tab to modify the XSL template for the format. The XSL template controls the way the content is displayed on the Web site. Select "Update Default Template" to save your changes.
6. Select "Back To Asset Types List : Article Formats" to return to the format list page.

To delete a format:

1. Follow the instructions to view the formats for the asset type you are interested in.
2. Select the "Delete" icon to the right of the format name that you want to delete.
3. Select "Yes" in the confirmation box that comes up.
4. Select "Back to Asset Types List" to return to the previous page.

To activate a format:

1. Follow the instructions to view the formats for the asset type you are interested in.
2. Check the "Active" box to the right of the name of the format you want to activate.
3. Select "Back to Asset Types List" to return to the previous page.

To deactivate a format:

1. Follow the instructions to view the formats for the asset type you are interested in.
2. Uncheck the "Active" box to the right of the name of the format you want to deactivate.
3. Select "Back to Asset Types List" to return to the previous page.

Articles in this section

Details

Asset Association

Default XSL Template

See also

Sections and Pages
Site Preview
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Home > Site Manager by the Section > Content > Formats > Details

Details

The Details tab allows you to manage the base information for the current format.

Active: Select or deselect this checkbox to activate or deactivate the format. Inactive formats will not be available for use.

Format Details: This summary box contains the basic information for the format.

- **Format Name**: This text entry field contains the name of the format. This is the name the format will be referred to throughout the Site Manager.
- **Example Image**: This text entry field contains the name of the graphic file that is used as a sample for this format. The graphic file will be displayed in the "Example Image Preview" summary box, as well as in other areas in the Site Manager.
- **Description**: This text entry field contains a description of the format. The description should include all the information necessary to describe how the asset associated with the format will look when the format is used.

Example Image Preview: This summary box displays the sample image file entered in the "Example Image" text entry field.

Update Format: This button saves the modifications made on this tab. No modifications will be saved until this button is selected.

See also

Asset Association
Default XSL Template

Home > Site Manager by the Section > Content > Formats > Asset Association

Asset Association

The Asset Association tab allows you to manage the assets that the current format is associated with. Modifications to this tab are effective immediately.

Associated Asset Types: This list box contains the list of assets that are associated with the current format. The format will only be applied to assets in this list.

Not Associated: This list box contains the list of assets that are not associated with the current format.

Add: This button moves a selected asset from the "Not Associated" list to the "Associated Asset Types" list. Select an asset in the "Not Associated" list, then select this button to move it to the "Associated Asset Types" list.

Remove: This button moves a selected asset from the "Associateed Asset Types" list to the "Not Associated" list. Select an asset in the "Associated Asset Types" list, then select this button to move it to the "Not Associated" list.

See also

Details
Default XSL Template

Default XSL Template

This tab contains the XSL translation template that is applied to the assets associated with the current format. The template is responsible for formatting the asset in the manner desired by the format. Note: a knowledge of XSL is required in order to make successful modifications to this tab.

Default XSL Template: This text entry field contains the XSL template that is used to transform the asset into the format desired.

Update Default Template: This button saves the modifications made to the XSL template. No modifications will be saved until this button is selected.

See also

Details
Asset Association

Upload Media

Use this page to upload new media for the site. You may also preview existing media.

To upload new media:

1. In the "Media Type:" drop-down list box, select the type of media you will be uploading.
2. In the "Directory" drop-down box, select the directory you want the media saved in.
3. Enter the full path of the file you want to upload in the "Select File to Upload" text box. You may also select "Browse" and browse to the file in the dialog that comes up.
4. Select "Upload". The page will refresh and the "Preview" area on the right will contain information about the media and a preview of it.

To preview existing media:

1. In the "Media Type:" drop-down list box, select the type of media you will be previewing.
2. In the "Directory" drop-down box, select the directory that the media you want to preview is in.
3. In the "Select Media:" list box, select the media you wish to preview. The page will refresh and the "Preview" area on the right will contain information about the media and a preview of it.

See also

Sections and Pages
Site Preview
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Site Configurations

Use this page to manage the different sites associated with this implementation.

To create a site:

1. Enter a name and a code for the site.
2. Use the "Site Type" drop-down list box to indicate if the site is a B2B or B2C site.
3. Select "Create Site" to create the site.
4. Use the "Attributes" tab to set the various attributes for the site:
   - Select the catalog that will be used by the site.
   - Indicate whether or not this will be the default site.
   - Enter a description for the site.
   - Select a "Home Page Template" if you want to set a specific way for the home page to be rendered. If no template is selected, the home page will be rendered following the default rules for the implementation.
   - Select "Save Attributes" to save your changes.
5. On the "Configurations" tab, make selections for whether or not back-ordering and pre-ordering of items is permitted on the website. Select "Save Configurations" to save your changes.
6. On the "Site URLs" tab, enter the urls that are valid for the site. Select "Create Site URL" to save each URL.
7. On the "Automated Merchandising" tab, enter information to configure how cross sells and up sells can be automatically generated. Follow the steps below for both cross sells and up sells:
   - Use the "Do Not Display" and "Display" list boxes to define where the products displayed in the cross sell or up sell are pulled from. "Manual Associations" is the list of products manually set up in the Site Manager for a product. "Products Purchased With" is the list of additional products that are purchased at the same time as a product. "Products Ensembled With" is the list of products included in ensembles with a particular product. The order of the items in the "Display" list box affect the order the items are displayed in on the web site.
   - Select a date range to use in the "Pull Products From the Following Date Ranges" drop-down list box.
   - Select the maximum number of products that can be displayed from the "Products Purchased With" category.
   - Select the maximum number of products that can be displayed from the "Products Ensembled With" category.
8. On the "Relate" tab, enter information to configure the usage of gift cards, gift certificate, and customer management integration.
   - Select "Allow Redemption of Gift Cards & Gift Certficates" if gift cards and gift certificates are to be used on the web site.
   - If gift cards and gift certificates are being used, fill in the fields in the "Gift Card Configuration" and "Gift Certificates Configuration" summary boxes.
   - Select "Enable Customer Integration" if customer management will be done through the Relate application.
   - Fill in the fields in the "Relate Web Services Settings" summary box if gift cards and gift certificates are being used on the web site, or customer management will be done through Relate.
9. On the "Locate" tab, enter information to configure managing inventory through the Locate application.
   - Select "Enable Locate" if Locate is being used for inventory management. Enter the Locate URL in the "Locate Endpoint Url" text entry field so that the web site can communicate with Locate.
   - Select "Enable Store Pickup" if store pickup will be permitted on the web site. Fill in the rest of the fields in the summary box to configure in store pickup.
   - Select "Enable Ship from Store" if store shipment will be permitted on the web site.
10. On the "Parameters" tab, enter any site parameters and their values. Select "Create Site Parameter" to save each parameter.

To edit a site:

1. Locate the site you wish to edit. Select the "Edit" icon for that site.
2. On the "Attributes" tab, modifiy the site's attributes as necessary. Select "Save Attributes" to save your changes.
3. On the "Configurations" tab, modify the settings for allowing pre-orders and back-orders on the site. Select "Save Configurations" to save the changes.
4. On the "Site URLs" tab, delete any of the site's URLS that are no longer needed. Add new URLS as necessary. Select "Create Site URL" to save each URL.
5. On the "Automated Merchandising" tab, make adjustments as necessary to the categories used to create cross sells and up sells.
6. On the "Relate" tab, make adjustments as necessary to the usage of gift cards, gift certificates, customer management, and Relate integration.
7. On the "Locate" tab, make adjustments as necessary to the usage of in-store pickup, shipment to and from a store, and connectivity with the Locate application.
8. On the "Parameters" tab, delete any of the site's parameters and values that are no longer necessary. Add new parameters and values as needed and select "Create Site Parameter" to save each parameter.

To make a copy of an existing site:

1. Locate the site you wish to edit. Select the "Clone" icon for that site. The page will refresh and you will see a new site listed that has a name of "Copy of X", where 'X' is the name of the site you cloned.
2. Select the "Edit" icon for the new site.
3. On the "Attributes" tab, modifiy the site's attributes as necessary. Select "Save Attributes" to save your changes.
4. On the "Configurations" tab, modify the settings for allowing pre-orders and back-orders on the site. Select "Save Configurations" to save the changes.
5. On the "Site URLs" tab, delete any of the site's URLS that are no longer needed. Add new URLS as necessary. Select "Create

Site URL" to save each URL.

6. On the "Automated Merchandising" tab, make adjustments as necessary to the categories used to create cross sells and up sells.
7. On the "Relate" tab, make adjustments as necessary to the usage of gift cards, gift certificates, customer management, and Relate integration.
8. On the "Locate" tab, make adjustments as necessary to the usage of in-store pickup, shipment to and from a store, and connectivity with the Locate application.
9. On the "Parameters" tab, delete any of the site's parameters and values that are no longer necessary. Add new parameters and values as needed and select "Create Site Parameter" to save each parameter.

To make a site the default site:

1. Locate the site that will become the default site.
2. Select the "Default" checkbox for that site. The page will refresh and you will see that site is now listed as the default site.

To remove a site:

1. Locate the site you wish to remove.
2. Select the "Delete" icon for that site.
3. A dialog box will appear, confirming that the site should be removed. Select "Yes" to confirm the delete.
4. The page will refresh and you will see that the site is no longer included in the list.

Articles in this Section

See also

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Attributes

The Attributes tab allows you to manage the basic attributes of the current site.

Site Information: This summary box contains much of the basic information for the current site.

- **Site Name**: This text entry field contains the name of the site. This is the name the site will be referred to throughout the Site Manager. This is a required field.
- **Site Code**: This text entry field contains the code for the site. This is a required field.
- **Site Type**: This non-editable field indicates whether the site is a B2B or a B2C site.
- **Catalog**: This drop-down list box contains the catalog to be used for the site. All items shown on the site will come from this catalog. This is a required field.
- **Default Site**: Select or deselect this checkbox to indicate whether or not this is the default site for the website.
- **Home Page Template**: This drop-down list box contains a list of pre-defined templates that can be used to render the home page. If a template is selected, the home page will be rendered using the formatting information in the template.
- **BPA Change Request Form Email (available only when editing a B2B site)**: This text entry field contains the email address where business partner account change request emails are sent. This is a required field.
- **Quote Request Form Email (available only when editing a B2B site)**: This text entry field contains the email address where quotes are sent. This is a required field.
- **Lead Generation Form Email (available only when editing a B2B site)**: This text entry field contains the email address where lead generations are sent. This is a required field.
- **Registration and Browsing (available only when editing a B2B site)**: This set of radio buttons defines the web site access. Select "Closed registration & public browsing not allowed" if the web site is closed to visitors that do not have accounts on the site. Select "Closed registration & public browsing allowed" if the website is open to browsing by the public, but requests for user accounts require administrative action. Select "Open registration & public browsing allowed" if the web site is open to browsing by the public and user accounts can be created without administrative action. This is a required field.
- **Delivery Date (available only when editing a B2B site)**: This set of radio buttons defines how delivery date requests are managed. This is a required field.
  - **Allow Delivery Date Requests at the Order Level**: Select this button if delivery dates are accepted at the order level. Enter the minimum and maximum number of days past the current date that the requested delivery date can fall within.
  - **Allow Delivery Date Requests at the Item Level**: Select this button if the delivery dates are accepted at the item level. Enter the minimum and maximum number of days past the current date that the requested delivery date can fall within.

Description: This rich text edit field contains a description of the site. This description should describe anything notable about the site. The description can be formatted as desired with the formatting tools of the text editor.

Save Attributes: This button saves the modifications made on this tab. No modifications will be saved until this button is selected.

See also

Configurations
Site URLs
Automated Merchandising
Relate
Locate
Social
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Home > Site Manager by the Section > Content > Site Configurations > Configurations

Configurations

The Configurations tab allows you to manage preorder and backorder configurations for the site, shopping cart duration, and the number of login attempts permitted.

Backorder/Preorder configurations: This area allows you to configure whether or not backordering and preording items on the website is available. Selections made here will affect the inventory management options available for the site's product variants.

Allow back-ordering: Select this checkbox to enable back-ordering of items on the website.

Allow pre-ordering: Select this checkbox to enable pre-ordering of item on the website.

Shopping Cart Duration: Enter the number of days that abandoned shopping carts will retrain their contents. After the specified number of days, the items will be removed from the cart.

Number of login attempts allowed: This field contains the number of failed login attempts a user is permitted. After this number is reached, the customer will not be allowed to log in again without resetting their password or contacting customer service for assistance.

Save Configurations: Select this button to save the changes made on this tab. No changes will be saved until this button is selected.

See also

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Site URLs
Automated Merchandising
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Site URLs

The Site URLs tab allows you to manage the domain URLs for the current site.

Create a Site URL: This summary box allows you to create a new doman URL for the site. Enter the URL in the "URL" text entry field. If your site is an international site, select the locale the URL will be used in from the "Use in Locale" drop-down list box. Select "Create Site URL". The new URL will be created and added to the "Domain URLs List".

Domain URLs List: This list contains the list of domain URLs created for the site. To remove an URL from the list, select the "Delete" icon.

See also

Attributes
Configurations
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Automated Merchandising

The Automated Merchandising tab allows you to manage the automated merchandising settings for the site. Automated Merchandising affects how cross sells and up sells are chosen for display for the products on the site. Note: Changes made to this tab will not be reflected until after a background process has run.

Enable Automated Merchandising: Select or deselect this checkbox to enable or disable automated merchandising. If disabled, items on the rest of this tab will not be available for selection.

Cross-Sells: This summary box controls which items will be selected for display as cross-sells for the products on the website.

- **Do Not Display**: This list box contains the list of items that will not be selected as a cross-sell for a product on the website.
- **Display**: This list box contains the list of items that will be selected to be used as cross-sells for a product on the website.
- **Add**: This button moves an item from the "Do Not Display" list box to the "Display" list box. Select an item in the "Do Not Display" list box, then select this button.
- **Remove**: This button moves an item from the "Display" list box to the "Do Not Display" list box. Select an item in the "Display" list box, then select this button.
- **Move Up**: This button moves a selected item in the "Display" list box higher in the order of items in that list box. The higher the order, the higher the precedence in selecting products to be shown as cross-sells.
- **Move Down**: This button moves a selected item in the "Display" list box lower in the order of items in that list box. The lower the order, the lower the precedence in selecting products to be shown as cross-sells.
- **Pull products from the following date ranges (Available only when editing a B2C site):**: Use the drop-down list box to select a date range that eligible products will be pulled from.
- **Recommended Products (Available only when editing a B2C site)**: Use the drop-down list box to select the maximum number of recommended products that will be displayed.
- **Products Ensembled With (Available only when editing a B2C site)**: Use the drop-down list box to select the maximum number of products ensembled with that will be displayed.

Up-Sells: This summary box controls which items will be selected for display as up-sells for the products on the website.

- **Do Not Display**: This list box contains the list of items that will not be selected as a up-sell for a product on the website.
- **Display**: This list box contains the list of items that will be selected to be used as up-sells for a product on the website.
- **Add**: This button moves an item from the "Do Not Display" list box to the "Display" list box. Select an item in the "Do Not Display" list box, then select this button.
- **Remove**: This button moves an item from the "Display" list box to the "Do Not Display" list box. Select an item in the "Display" list box, then select this button.
- **Move Up**: This button moves a selected item in the "Display" list box higher in the order of items in that list box. The higher the order, the higher the precedence in selecting products to be shown as up-sells.
- **Move Down**: This button moves a selected item in the "Display" list box lower in the order of items in that list box. The lower the order, the lower the precedence in selecting products to be shown as up-sells.
- **Pull products from the following date ranges (Available only when editing a B2C site):**: Use the drop-down list box to select a date range that eligible products will be pulled from.
- **Recommended Products (Available only when editing a B2C site)**: Use the drop-down list box to select the maximum number of recommended products that will be displayed.
- **Products Ensembled With (Available only when editing a B2C site)**: Use the drop-down list box to select the maximum number of products ensembled with that will be displayed.

See also

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Home > Site Manager by the Section > Content > Site Configurations > Relate

Relate

The Relate tab is available only when editing a B2C site.

The Relate tab allows you to configure how gift cards and gift certificates are used on the site. You can also configure connections with the Relate system.

Gift Card and Certificate Configurations: This summary box allows you to customize the settings for how gift cards and gift certificates are used on the website.

- **Allow Redemption of Gift Cards:** Select this checkbox to permit users to redeem gift cards on the website.
- **Require PIN:** Select this checkbox if a PIN is required for the redemption of gift cards on the website.
- **Gift Certificate and Card Endpoint URL**: This text entry field contains the URL of the web services endpoint.

Gift Card Configuration: This summary box allows you to customize the settings for how gift cards can be used on the web site.

- **Gift Card Prefix**: This text entry field contains the prefix that will be used on the gift cards.
- **Gift Card Series Sequence**: This text entry field contains the series sequence that will be used on the gift certificates.
- **Enable Messages on Gift Cards**: This checkbox indicates whether or not messages can be added to gift cards when they are purchased.
- **Message Length**: This text entry field contains the maximum number of characters that can be in a gift card message.
- **URL for Terms & Conditions**: This text entry field contains the context-relative URL of the website page that contains the terms and conditions for gift cards.
- **URL for FAQs**: This text entry field contains the context relative URL of the website page that contains the FAQ page for gift cards.

Relate Web Services Settings: This summary box allows you to customize the parameters needed to communicate with the Relate Gift Card service.

- **User ID**: This text entry field contains the identification of the Relate user.
- **Operator ID**: This text entry field contains the operator identifier of the Relate user.
- **Location ID**: This text entry field contains the location identifier of the Relate user.
- **Device ID**: This text entry field contains the device identifier for Relate.

Customer Integration Configurations: This summary box allows you to customize the parameters available for integration with the Relate customer management application.

- **Enable Customer Integration**: Select this checkbox to enable interaction with the Relate customer management application.
- **Customer Integration Endpoint URL**: This text entry field contains the URL for the Relate customer management application.
- **Relate Security User ID**: The Relate security used is used in Relate to control access to customer information. Enter the name of the Relate security user ID in this box that matches the Relate security user set in Relate.
- **Track username that makes change to customer data in Relate**: Select or deselect this checkbox to track or not track the name of any user that prompts an update to customer data in Relate.
- **Enable Wish List Integration**: Select this checkbox to integrate the wish lists in the site with the customer wish lists in Relate. If selected, Relate functions as the system of record for wish lists.

Loyalty Configurations: This summary box allows you to customize the parameters available for integration with the Relate loyalty application.

- **Enable Loyalty Program**: Select this checkbox to enable integration with the Relate loyalty application.
- **Display number of points to be earned in checkout (proforma message)**: Select this checkbox to display a message during checkout that indicates the number of loyalty points that will be earned with the purchase.
- **Dummy card number to calculate proforma message**: This text entry field contains a dummy loyalty card number that will be used to calculate the number of loyalty points earned in a purchase.
- **Loyalty card prefix**: This text entry field contains the prefix used for all of the loyalty cards.
- **Loyalty card series sequence number**: This text entry field contains the sequence number used for the loyalty cards.
- **Loyalty Account Endpoint URL**: This text entry field contains the URL for the loyalty account application.
- **Award Account Endpoint URL**: This text entry field contains the URL for the awards application.

Gift Certificate Configurations: This summary box allows you to customize the settings for how gift certificates can be used on the web site.

- **Enable Messages on Gift Certificates**:This checkbox indicates whether or not messages can be added to gift certificates when they are purchased.
- **Message Length**:This text entry field contains the maximum number of characters that can be in a gift certificate message.
- **Terms & Conditions URL**: This text entry field contains the context-relative URL of the website page that contains the terms and conditions for gift certificates.
- **FAQs URL**: This text entry field contains the context relative URL of the website page that contains the FAQ page for gift certificates.

Save Attributes: Select this button to save the modifications made on this tab. No changes are saved until this button is selected.

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Home > Site Manager by the Section > Content > Site Configurations > Locate

Locate

The Locate tab allows you to customize the integration with Locate. You can enable and disable the integration and manage store pickup and ship to and from store functionality.

Locate Web Service Setttings: Use this summary box to customize where the Locate application is located.

- **Enable Locate**: Select this checkbox to enable integration with the Locate application.
- **User ID for OCP Orders**: This text entry field contains the identifier of the employee or application that is communicating with the Locate application.
- **Destination**: This text entry field contains the name of the Locate account that is associated with the website. The Locate installation team will be able to provide this name, and it will be "locate" in most cases.
- **Source Location for OCP Orders**: This text entry field contains the name of the external system that is originating the Locate service requests. This can be any string, as long as it does not replicate a string being used for another system communicating with the same Locate installation.
- **Default Search Distance**: This text entry field contains the maximum distance that a store can be from a customer address and still be included as a store that the customer can pick up items from.
- **Location Code**: This text entry field contains the location requesting the product search. This should match the distribution center location code that is set up in Locate for the site. It is used when querying the availability of a product and also when the order is submitted to Locate.
- **Store Listing System Code**: This text entry field contains the system code used to communicate with the XStore application to retrieve store information.
- **Inventory Lookup System Code**: This text entry field contains the system code used to communicate with the Locate application.
- **Inventory Service Endpoint URL**: This text entry field contains the URL for the Locate application.
- **Distribution Center ID**: This text entry field contains the Locate application identifier of the distribution center that orders will be fulfilled from.
- **Discovery Service Endpoint URL**: This text entry field contains the URL for the application that contains store information.
- **Locate Messages Version**: This text entry field contains the version number of the Locate application that is being communicated with.
- **Fulfillment Request System Code**: This text entry field contains the system code that is used when sending a fulfillment request to the Locate application.
- **Use Local Tables (includes Checkout)**: This checkbox is only available if "Enable Locate" has been selected. This checkbox indicates whether or not the web site will be using local tables for the Locate information or will be communicating directly with the Locate application.
- **Send store pickup email from Locate**: This drop-down checkbox indicates whether an email will be sent to the customer from the Locate application when their item is ready for pick up from the store. 'Y' indicates the email will be sent from the Locate application. 'N' indicates the email will be sent from the retailer's website.

Ship From Store and Store Pickup: Use this summary box to customize settings for ship from store and store pickup.

- **Enable ship from store**: Select this checkbox if ship from store functionality is available for this website.
- **Enable store pickup**: Select this checkbox if store pickup is available for this website.
- **Split Orders**: Select an option in this drop-down list according to how you want orders to be split for Locate:
  - **Split By Item and Check Order Status**: Each order will be split into multiple orders for Locate, one order for each item in the order. Status will be maintained at the order level. Split Order should be turned off in Locate for this selection.
  - **Split By Order and Check Order Status**: Any order in that contains multiple shipping addresses will be split into multiple orders for Locate, one order for each shipping address (or store pickup). After the split, there may be multiple items in each order. Status will be maintained at the order level, not the item level. Split order should be turned off in Locate for this selection.
  - **Split By Order and Check Item Status**: Any order in that contains multiple shipping addresses will be split into multiple orders for Locate, one order for each shipping address (or store pickup). After the split, there may be multiple items in each order. Status will be maintained at the item level. Split order should be turned on in Locate for this selection.

Save Attributes: Select this button to save the modifications made on this tab. No changes are saved until this button is selected.

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Home > Site Manager by the Section > Content > Site Configurations > Social

Social

Use the Social tab to configure the integration with social networks.

Social Site-wide Configuration: This summary box contains the configuration for integration with social networks.

- **Enable Social Features for Starter Store**: Select or deselect this checkbox to enable or disable integration with social networks. If you modify this checkbox, you will also need to select new templates for your site's home page, product detail page, and ensemble page. The new templates should support the state of this checkbox.

Social Login: This summary box contains the configuration for permitting members to use their social network login to log in to the site.

- **Enable Social Login for Starter Store**: Select or deselect this checkbox to permit or deny site visitors to log in to the site using their login information from a social network.

Integrated Social Networks: This summary box contains a list of all of the social networks that are integrated with the web site.

- **Social Network List**: Use the Sort Order text entry fields to modify the appearance order of the social networks. Select or deselect the Active checkbox next to any social network to activate or deactivate integration with it. Inactive social networks will not appear on the web site.

Save: Select this button to save modifications made on this page. No modifications are saved until this button is selected.

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Home > Site Manager by the Section > Content > Site Configurations > Locales

Locales

The Locales tab allows you to manage the locales that are defined for the site. This tab is only available on international sites.

Locales List: The locales list shows all the locales defined for the site. The locales are listed in the order they will appear on the web site. Changes to this order are effective immediately.

- **Batch**: Select this checkbox if you have multiple locales that you want to reorder at the same time. Select "Move To Top" for any of the batch locales, and all selected locales will move to the top of the list together.
- **Sort Order**: This column shows the numeric sort order for each locale . To reorder locales, change the number appearing in this column for the affected locales, then select "Update Sort Order".
- **Language**: This column shows the language used in the locale.
- **Country**: This column shows the country of the locale.
- **Active**: This checkbox indicates whether or not the locale is active and available for use on the site. Inactive locales are not available for use on the site.
- **Default**: Select this icon to make a locale the default locale.
- **Move To Top**: Select this icon to move the locale to the top of the sort order.

Update Sort Order: This button will update the sort order of the locales based on the modifications made in the "Sort Order" column.

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Home > Site Manager by the Section > Content > Site Configurations > Parameters

Parameters

The Parameters tab allows you to manage configuration parameters for the site. These parameters may affect various behaviors of the site.

Site Parameter List: This list contains the list of site parameters currently defined for the site.

- **Functional Area**: This column contains the functional area the parameter is associated with.
- **Parameter Name**: This column contains the name of the parameter. Select the name to edit the parameter. The Edit Site Parameter page will appear.
- **Parameter Value**: This columns contains the value of the parameter. Select the value to edit the parameter. The Edit Site Parameter page will appear. Some parameters contain values that are not displayed for security reasons. In these cases, the phrase "[Protected Data]" will appear as the value. These parameters can be edited and their values changed in the same manner as other parameters.
- **Description**: This column contains the description of the parameter.
- **Delete**: Select this icon to delete the parameter.

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Home > Site Manager by the Section > Content > Site Configurations > Parameters > Find a Site Parameter

Find a Site Parameter

This tab is used to locate a site parameter. Enter as many of the search values that you know, then select "Find". To view all site parameters, leave the search fields empty and select "Find".

Functional Area: Select the functional area the parameter is associated with.

Parameter Name: Enter the name of the parameter.

Parameter Value: Enter the value of the parameter.

Description: Enter the description of the parameter.

Find: Select this button to search for the parameter. Search results will be displayed at the bottom of the page.

See also

Create a Site Parameter
Edit Site Parameter

Create a Site Parameter

This tab is used to create a new site parameter.

Parameter Name: Enter the name of the new site parameter.

Parameter Value: Enter the value for the new site parameter.

Create Site Parameter: Select this button to create the new site parameter. The Edit Site Parameter page will appear. Fill in a description for the parameter, and assign it to a functional area, then select "Save Parameter". The page will refresh and you will see the new parameter in the list of parameters.

See also

Find a Site Parameter
Edit Site Parameter

Edit Site Parameter

This page allows you to edit a site parameter.

Back to Site Config Parameter List: Select this link to return to the full list of site parameters.

Parameter Name: This field contains the name of the parameter. The name cannot be edited.

Parameter Value: This field contains the value of the parameter. Some site parameters contain values that should not be displayed for security reasons. For these parameters you will see dots in place of the letters in the parameter value. Dots will also appear in place of letters when editing the parameter values.

Description: This field contains a description of the parameter.

Functional Area: This field contains the functional area the parameter is associated with.

Save Parameter: Select this button to save the modifications.

See also

Find a Site Parameter
Create a Site Parameter

Mobile App

The Mobile App tab allows you to configure options for the mobile application. This tab is only available when the mobile application is being used with the site.

Mobile App Configurations: This summary box contains options for the way the mobile application works.

- **Apple App ID**: This field contains the Apple application ID for the mobile app.
    - **Verify App ID**: Select this button to verify that the Apple application ID is valid.
- **Number of Items to Load at a Time on Product Browse/Search Results**: This field contains the maximum number of entities that can be shown on the screen at one time when browsing products or viewing search results.
- **Force User to Enter CVV for Credit Card Payment**: Select this checkbox to require a CVV to be entered when checking out on the mobile app with a credit card.
- **Catalog Request**: Select this option to include a catalog request page on the mobile app.

Game Configurations: This summary box contains configuration information for games that can be played on the mobile app. Note: Implementation teams and clients will need to ensure that any client using this feature modifies it to comply with all local, state, and/or federal laws regarding promotions.

- **Enable Scratch to Win Game**: Select this checkbox to enable the Scratch to Win game.
- **Prevent Customer from Re-playing Scratch to Win Game for**: Enter the number of hours that must pass before the user can play the Scratch to Win game again.
- **Enable Spin to Win Game**: Select this checkbox to enable the Spin to Win game.
- **Prevent Customer from Re-playing Spin to Win Game for**: Enter the number of hours that must pass before the user can play the Spin to Win game again.
- **Game Promotions Expire in**: Enter the number of days promotions won in either game are valid for. Unused promotions will expire the configured number of days after they are won.

Passbook Configurations: This summary box contains configuration options for the Passbook.

- **Passbook Background Color**: Enter the hex color value that should be used as the background color of the Passbook.
- **Passbook Label Color**: Enter the hex color value that should be used as the label color of the Passbook.
- **Passbook Font Color**: Enter the hex color value that should be used as the font color of the text in the Passbook.
- **Passbook Logo Text**: Enter the text that should be used with the logo of the Passbook.
- **Passbook Logo Image**: Select the "Change Image" or "Create Image" link to select the image that will be used as the logo for the Passbook. The logo is displayed in the top left of the Passbook.
- **Passbook Icon Image**: Select the "Change Image" or "Create Image" link to select the icon image for the Passbook. The image is displayed in the lock screen.
- **Passbook Strip Image**: Select the "Change Image" or "Create Image" link to select the strip image for the Passbook. The strip image is displayed behind the primary fields of the Passbook.

Save Configurations: Select this button to save the settings on this page.

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Home > Site Manager by the Section > Content > Vanity URLs

Vanity URLs

Use this page to manage the vanity URLs defined for the site. Vanity URLs are used to redirect the user to a specific page on the site. You may create, edit, and delete vanity URLs.

To create a vanity URL:

1. In the "URL Code" text box, enter the text that will be used as the identifier for this url for the redirect. URL codes may contain any of following characters:
   - Uppercase alphabetic characters: [A..Z]
   - Lowercase alphabetic characters: [a..z]
   - Numerals: [0..9]
   - Asterisks: *
   - Plus signs: +
   - Hypens: -
   - Underscores: _
2. In the "Redirect URL" text box, enter the URL the user should be redirected to. URLs should begin with a forward slash (/), and are context-sensitive (they do not contain the "http://www.yourcompany.com" portion of the URL).
3. Select "Create Vanity URL". The page will redraw and you will see your URL in the list of vanity URLs.
4. To activate the new URL, select the "Active" checkbox of the URL in the list.
5. To enter a start and stop date for the URL, follow the steps to edit an URL.

To edit a vanity URL:

1. Locate the URL you wish to edit in the list of URLs.
2. Select the "Edit" icon for the URL. The page will redraw and you will see a "Vanity URL" tab.
3. To activate the URL, select the "Active" checkbox. To deactivate the URL, deselect the "Active" checkbox.
4. Enter a new URL code in the "VanityURL Code" text box. See the entry above for creating a new vanity URL for the list of allowed characters in an URL code.
5. Enter a new URL in the "Redirect URL" text box. URLs should begin with a forward slash (/), and are context-sensitive (they do not contain the "http://www.yourcompany.com" portion of the URL).
6. Enter a report label for the URL in the "Redirect Report Label" text box.
7. Enter a start date for the URL in the "Start Date" text box or use the calendar icon to select a start date. URLs without start dates are considered active as soon as their status is set to active.
8. Enter an end date for the URL in the "End Date" text box or use the calendar icon to select an end date. URLs without end dates are considered active as long as their status is set to active.
9. Select "Save" to save your changes.

To activate an URL:

1. Locate the URL you want to activate in the list box.
2. Select the "Active" checkbox for the URL.

To deactivate an URL:

1. Locate the URL you want to deactivate in the list box.
2. Deselect the "Active" checkbox for the URL.

To delete an URL:

1. Locate the URL you wish to delete in the list box.
2. Select the "Delete" icon.
3. A message box will appear, asking you to confirm the delete. Select "Yes".

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Vanity URL

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Home > Site Manager by the Section > Content > Vanity URLs > Vanity URL

Vanity URL

The Vanity URL tab allows you to set the attributes for the current vanity URL.

Active: Select or deselect this checkbox to activate or deactivate the vanity URL. Inactive vanity URLs will not be available for use.

Vanity URL Code: This text entry field containst the code for the vanity URL.

Redirect URL: This text entry field contains the context sensitive (they do not contain the "http://www.yourcompany.com" portion of the URL) redirect path for the URL. This field is required.

Redirect Report Label: This text entry field contains the label that will be used on the redirect report for this URL.

Start Date: This is the date that the URL will first become available. An empty start date means the URL is available immediately.

End Date: This is the last date the URL will be available. An empty end date means the URL will be available until cancelled by hand.

Home > Site Manager by the Section > Content > Email Templates

Email Templates

Use this page to manage the email templates defined for the site. There are two types of email templates:

- Transactional - These templates are used for emails that are sent to visitors of the site based on the transactions they do while on the site. Examples of these include forgotten password emails and order confirmation emails.
- Experience Manager - These templates are used within the Experience Manager section of the Site Manager. These emails are used within experiences to communicate information to a visitor based on the goal of the experience. Examples of these include special discount emails and emails prompting a user to complete a purchase.

To find an email template:

1. Select the type of email template you are editing in the "Template Type" drop-down list box.
2. If you selected "Transactional" as the template type and you are administering multiple sites, select the site the email template is associated with in the "Site" drop-down list box. A list of email templates will appear at the bottom of the page.

To edit an email template:

1. Follow the "To find an email template" instructions above.
2. Select the "Edit" icon to the right of the template you wish to edit.
3. If your site is an international site, select the language of the template you wish to edit.
4. If your site is an international site, select the country associated with the template you wish to edit.
5. Enter a new subject for the email in the "Subject" text field.
6. Enter a different source for the email in the "From" text field.
7. Select the "HTML Body Contents" tab header to modify the HTML version of the email. You may use HTML markup tags to format the content. If you wish to use email tokens in the body, see a list of available tokens here.
8. Select the "Text Body Contents" tab header to modify the text version of the email. Do not use any HTML markup tags for the text content. If you wish to use email tokens in the body, see a list of available tokens here.
9. Select "Preview" to preview your changes.
10. Select "Save" to save your changes.

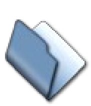
To create a new Experience Management email template:

1. Select "Experience Manager" in the "Template Type" drop-down list box. The page will redraw.
2. Enter a name for the template in the "New Template Name" text field.
3. Select "Create Template". The page will redraw.
4. If your site is an international site, select the language the template will be created in.
5. If your site is an international site, select the country the template will be associated with.
6. Enter a subject for the email in the "Subject" text field.
7. Enter the source of the email in the "From" text field.
8. Select the "HTML Body Contents" tab header.
9. Enter the HTML body content of the email. You may use HTML markup tags to format the content. If you wish to use email tokens in the body, see a list of available tokens here.
10. Select the "Text Body Contents" tab header.
11. Enter the text body content of the email. Do not use any HTML markup tags for the text content. If you wish to use email tokens in the body, see a list of available tokens here.
12. Select "Preview" to preview the body content. The page will redraw and you will see tabs for the HTML and Text versions of the email body.
    - Select "HTML Version" to preview the HTML version of the email.
    - Select "Text Version" to preview the text version of the email.
    - Select "X" in the upper right-hand corner to close the preview when done. The page will redraw and you will return to the previous page.
13. Select "Save" to save your changes.

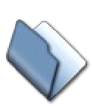
To remove an email template:

1. Follow the "To find an email template" instructions above.
2. Select the "Delete" icon to the right of the template you wish to remove.

Articles in this section



HTML Body Contents



Text Body Contents

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HTML Body Contents

The HTML Body Contents tab allows you to create an HTML version of the current email.

In the text entry field, enter the email body. You may use HTML markup tags to format the content, but you must enter the tags by hand, using the standard HTML < > format.

If you wish to use email tokens in the body, see a list of available tokens here.

To see a preview of the email and verify that the tags are correct, select "Preview".

See also

Text Body Contents

Home > Site Manager by the Section > Content > Email Templates > Text Body Contents

Text Body Contents

The Text Body Contents tab allows you to create a text version of the current email.

In the text entry field, enter the email body. Do not use any HTML or other formatting tags.

If you wish to use email tokens in the body, see a list of available tokens here.

To see a preview of the email, select "Preview".

See also

HTML Body Contents

Home > Site Manager by the Section > Content > Additional Sitemap Entries

Additional Sitemap Entries

This page is used to manage additions to the automatically generated sitemap list for the site. The sitemaps generation process creates a sitemap of the site to be used by search engine robots. URLs that are not part of the automated sitemap may be added on this page. They will then be added to the sitemap the next time the sitemap generation process is executed.

Add Sitemap Entry: This tab is used to enter information for new sitemap additions. It is also used to edit existing sitemap additions.

- **Location**: This field contains the URL of the page being added to the sitemap. This is a required field.
- **Change Frequency**: This field contains the frequency of how often the content on the URL changes. This is a required field.
- **Priority**: This field contains the importance of this URL compared to other URLs on the site. The higher the number selected, the higher the importance. This is a required field.
- **Add**: Select this button to create the new sitemap addition. This button is only available when adding a new entry.
- **Update**: Select this button to save the changes made to an an existing sitemap addition. This button is only available when editing a sitemap addition.
- **Cancel**: Select this button to cancel the changes made to an existing sitemap addition. No changes will be saved. This button is only available when editing a sitemap addition.

Sitemap List: This list contains all of the existing sitemap additions.

- **Location**: This column contains the URL of the sitemap addition.
- **Change Frequency**: This column contains the change frequency of the sitemap addition.
- **Priority**: This column contains the relative priority of the sitemap addition.
- **Active**: Select or deselect this column to enable or disable the sitemap addition. Enabled/disabled sitemap additions are added/removed from the sitemap the next time the sitemap generation process is executed.
- **Edit**: Select this icon to edit the sitemap addition.
- **Delete**: Select this icon to remove the sitemap addition. Deleted sitemap additions will be removed from the sitemap the next time the sitemap generation process is executed.

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Home > Site Manager by the Section > Content > Locales & Languages

Locales & Languages

This section is used to manage the countries, languages, and locales for an international site.

To add a country to the list of supported countries for the site:

1. Select the Countries tab.
2. Select the Add Country button. A pop-up window will appear.
3. Select the country that will be added from the Countries list.
4. Enter a regular expression pattern for the zip/postal code for the country.
5. Enter a regular expression pattern for the phone numbers of the country.
6. Select "Ok". The window will dismiss and the new country will appear in the list.

To modify the regular expression for zip/postal codes or phone numbers for a country:

1. Select the Countries tab.
2. Select the edit icon for the country. A pop-up window will appear.
3. Update the regular expression to the new pattern.
4. Select "Ok". The window will dismiss and the new pattern will appear in the list.

To add a language to the list of supported languages for the site:

1. Select the Languages tab.
2. Select the Add Language button. A pop-up window will appear.
3. Select the language that will be added from the languages list.
4. Select "Ok". The window will dismiss and the new language will appear in the list.

To add a locale:

1. Select the Locales tab.
2. Select the Add Locale button. A pop-up window will appear.
3. Select the country for the locale.
4. Select the language for the locale.
5. Enter the URL for the locale.
6. Select "Ok". The window will dismiss and the new locale will appear in the list.

To set the flag for a locale:

1. Select the Locales tab.
2. Select the Edit icon for the locale. A pop-up window will appear.
3. Enter a new URL for the flag.
4. Select "Ok". The window will dismiss and the updated URL for the flag will appear in the list.

To modify the languages supported for a country:

1. Select the Languages Per Countries tab.
2. Select the checkbox for each language supported by the country.
3. Deselect the checkbox for each language that is not supported by the country.

Articles in this section

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Home > Site Manager by the Section > Content > Locales & Languages > Countries

Countries

This tab is used to manage the countries defined for the site.

Countries list: This list contains all of the countries defined for the site.

- **Country Code**: The internal code used for the country.
- **Description**: The internal description used for the country.
- **Zip Regex**: The regular expression that describes the syntax rules for zip/postal codes for the country. For more information on regular expressions, see regular expression information.
- **Phone Regex**: The regular expression that describes the syntax rules for phone numbers for the country. For more information on regular expressions, see regular expression information.
- **Edit**: Select this icon to edit the country. A pop-up window appears which allows you to edit the regular expressions for the country.

Refresh to Display Updates: Select this button to refresh the country list. This is used if modifications have been made on other tabs and you wish to see the updates.

Add Country: Select this button to add a new country. A pop-up window will appear and you will be able to select the country from a pre-defined list of countries. You will also enter a regular expression for zip/postal codes and phone numbers for the country.

See also

Languages
Locales
Languages Per Countries

Languages

This tab is used to manage the languages available for an international site.

Language list: This list contains all of the languages supported on the site.

- **Language Code**: The internal code for the language.
- **Description**: The internal description of the language.

Refresh For Updates: Select this button to refresh the page. This is used when updates have been made and you want to ensure you are seeing all of them.

Add Language: Select this button to add a language to the list of supported languages. A pop-up window appears that allows you to select the language from a list of languages.

See also

Countries
Locales
Languages Per Countries

Home > Site Manager by the Section > Content > Locales & Languages > Locales

Locales

This tab is used to manage the locales supported by the site. Locales are a combination of countries and languages.

Locale list: This list contains the list of locales that have been defined for the site.

- **Country Code**: The internal country code used for the country in the locale.
- **Language Code**: The internal language code used for the language in the locale.
- **Flag Icon URL**: The URL for the flag to be used for the locale.
- **Edit**: Select this icon to modify the flag URL for the locale. The country and language cannot be modified.

Refresh to Display Updates: Select this button to refresh the page. This is used when updates have been made and you wish to see them.

Add Locale: Select this button to add a locale to the list. A pop-up window will appear. You will be able to select a country that has been defined in the Countries tab, a language that has been defined in the Languages tab, and enter an URL for the flag to be used for the locale. Note that a flag should first be uploaded to the system through the Images tab.

See also

Countries
Languages
Languages Per Countries

Languages Per Countries

This tab is used to map the combination of countries to languages.

Mapping list: This list displays the currently supported countries and the languages that are supported in them.

- **Country Code**: The internal code for a country.
- **Country Description**: The internal description for a country.
- : Multiple columns will be displayed, each of which corresponds to a specific language. To associate a country to language, select the checkbox in language column for the country.

Refresh to Display Updates: Select this button to refresh the list. This button is used if modifications have been made on other tabs and the information on this tab needs to be update.

See also

Countries
Languages
Locales

Home > Site Manager by the Section > Experiences

Experiences

The Experiences section of the Site Manager allows you to create experiences that can customize the interactions a visitor may have with the web site. Each folder in this section contains information about the various components that can be used to build an experience. The folders are organized according to the sliding panes that appear on the left of the Experiences section.

Articles in this section

See also

Product Catalog
Content
Search
Customer Service
Reporting
Users and Roles
System Tools

Home > Site Manager by the Section > Experiences > All Experiences

All Experiences

This pane contains a list of all of the created experiences, organized into folders.

With the appropriate privileges you can change the experience and folder names by clicking on the experience or folder once. You can also add new folders to change the location of saved experiences. Experiences are listed alphabetically, followed by the folders.

Three buttons are located at the bottom of the tab:

- Find - Select this to find an experience.
- Open - Select this to open a selected experience. You can also drag an experience into the body to open it.
- New - Select this to create a new experience. A small arrow on the button means you have the privilege to create a new folder or a new experience. Click the arrow to select a new experience or new top level folder or subfolder.

Articles in this section

Experience Folders
Individual Experiences
Find Experiences
Connector Options
Estimate Group Sizes
Analytics
Experience Information Properties Tabs

See also

User Groups
Targeted Content
Awards
Email Templates

Home > Site Manager by the Section > Experiences > All Experiences > Experience Folders

Experience Folders

Click a folder to view a list of experiences and subfolders.

With the appropriate privileges you can right-click on a folder to add a new subfolder, rename, or delete the folder.

See also

Individual Experiences
Find Experiences
Connector Options
Estimate Group Sizes
Analytics
Experience Information Properties Tabs

Home > Site Manager by the Section > Experiences > All Experiences > Individual Experiences

Individual Experiences

Right-click a selected experience in the selection area list to open, add a new folder to the existing subfolder or top level, rename, or delete an experience.

New experiences are assigned the name of 'New Experience (1)' by default. Click the 'Edit' button at the top of each experience to edit experience information and assign a folder for your new experience to reside in, lock the experience, and make all components of your experience active. By locking an experience, you become the only one who can edit that experience until you, or a system administrator, unlock the experience.

See also

Experience Folders
Find Experiences
Connector Options
Estimate Group Sizes
Analytics
Experience Information Properties Tabs

Find Experiences

Enter a keyword and click 'Find' to find an experience. To further refine your search, click the '2. Add Constraints' tab and add a date range constraint.

See also

Experience Folders
Individual Experiences
Connector Options
Estimate Group Sizes
Analytics
Experience Information Properties Tabs

Home > Site Manager by the Section > Experiences > All Experiences > Connector Options

Connector Options

Use this page to modify the type of connector for this portion of the experience. A one-to-one connection will advance all qualified site vistors to the next node in the experience. A segmented connection will divide the qualified site visitors according to the percentages set up in the segments and advance the visitors to the next node in the correct segment of the experience. Segmented connectors are used to perform A/B testing.

To create a one-to-one connection:

1. Select "one-to-one".
2. Select "Save".

To create a segmented connection:

1. Select "user segmentation". A segmentation group area will appear on the right of the properties pane.
2. Enter a name for the segmentation in the "Segementation Group Name" text field.
3. Select "Add Segment". A new segment will appear in the list of segments.
    - To modify the segment name, select it and type in the new name.
    - To modify the percentage of users that will be sent through this segment, select the percentage and type in a new percentage. Note that the total percentage of all segments must equal 100%.
4. Repeat step 3 for each segment needed for the connector.
5. Select "Save".

See also

Experience Folders
Individual Experiences
Find Experiences
Estimate Group Sizes
Analytics
Experience Information Properties Tabs

Home > Site Manager by the Section > Experiences > All Experiences > Estimate Group Sizes

Estimate Group Sizes

Estimate group sizes provides information on the expected numbers of site visitors that will meet the criteria for each node of an experience.

See also

Experience Folders
Individual Experiences
Find Experiences
Connector Options
Analytics
Experience Information Properties Tabs

Home > Site Manager by the Section > Experiences > All Experiences > Analytics

Analytics

Analytics will forward you to the Reporting portion of the Site Manager, where you can run a report to determine how this experience is being used. For additional information on Analytics, refer to Areas of the Experience Manager Page.

See also

Experience Folders
Individual Experiences
Find Experiences
Connector Options
Estimate Group Sizes
Experience Information Properties Tabs

Home > Site Manager by the Section > Experiences > All Experiences > Experience Information Properties Tabs

Experience Information Properties Tabs

When an experience is open in the Experiences sections of the Site Manager, a number of tabbed panes will appear in the bottom properties pane. Information on each of the tabbed panes is included in the folders in this section.

Articles in this section

Name and Status Tab

Timeframe Constraint Tab

Activation Statuses Tab

See also

Experience Folders
Individual Experiences
Find Experiences
Connector Options
Estimate Group Sizes
Analytics

Name and Status Tab

Right-click a selected experience in the selection area list to open, add a new folder to the existing subfolder or top level, rename, or delete an experience.

New experiences are assigned the name of 'New Experience (1)' by default. Click the 'Edit' button at the top of each experience to edit experience information and assign a folder for your new experience to reside in, lock the experience, and make all components of your experience active. By locking an experience, you become the only one who can edit that experience until you, or a system administrator, unlock the experience.

See also

Timeframe Constraint Tab
Activation Statuses Tab

Timeframe Constraint Tab

Use this tab to enter a start and end date for the experience as a whole. If you enter dates here, no components in the experience will be allowed to start or stop outside of this time range. If you have already scheduled start and stop dates for some components, their earliest start date and latest stop date will be shown here.

Scheduling a time range for the experience as a whole is optional. If you do schedule a range for the experience, all components in the experience will have the same start and end date set here.

See also

Name and Status Tab
Activation Statuses Tab

Activation Statuses Tab

Shown in this tab is a count of all of the targeted content, award, and email template components in the experience and whether they are active or inactive. Active components are outlined in green in the body of the experience; inactive components are outlined in red or blue.

To activate all the components shown:

1. Select the "Activate All" button.

To deactivate all the components shown:

1. Select the "Deactivate All" button.

The component count does not update automatically. To refresh the count after activating or deactivating components:

1. Select the "Refresh Counts" button.

Making all of components shown in this tab active will make the experience live on the Web site if all of the user group conditions are also active and there are no timeframe constraints.

See also

Name and Status Tab
Timeframe Constraint Tab

Home > Site Manager by the Section > Experiences > User Groups

User Groups

Define a user group made up of any number of combined conditions.

Click on a folder to expand it and see the conditions beneath. Once you drag a condition into the body of the experience, properties for the condition will display in the properties pane at the bottom of your screen. When you save the properties, the condition in the body of the experience will be outlined in green to indicate it is complete.

When conditions are dragged into the body of the experience, they are added into a user group to allow you to add more conditions to the same user group with an 'and' or 'or' connection.

Each user group has two options for connection points in the body: satisfied or not satisfied. If the entire user group evaluates successfully (including 'and' and 'or' connections) it is satisfied. If it does not evaluate successfully it is considered not satisfied.

Articles in this section

See also

All Experiences
Targeted Content
Awards
Email Templates

Home > Site Manager by the Section > Experiences > User Groups > Checkout

Checkout

Conditions listed in the 'Checkout' folder are related to actions in a user's Shopping Cart or during checkout that affect the order total.

Articles in this section

Applied Promo Code

Promotion Code =

Promotion Code = (Single Use)

Shipping Methods

See also

Items In Cart/Current Order
Miscellaneous
Past Purchase Information
User Actions
User Info
Wish List

Applied Promo Code

Select whether a user has or has not applied a promotion code to the order. A promotion code can be for an item, order, or shipping discount.

See also

Promotion Code =
Promotion Code = (Single Use)
Shipping Methods

Home > Site Manager by the Section > Experiences > User Groups > Checkout > Promotion Code =

Promotion Code =

Enter one or more promotion codes that a user can apply to an order by entering the code and selecting the 'Add' button. Codes can also be imported from a file by entering the file name and then selecting "Import", or by selecting "Browse", browsing to and selecting the file, and then selecting "Import". Imported files should be a text file that contains one promotion code per line.

There is a limit of 100 promotion codes that can be entered in any one user group condition.

Codes can contain any combination of letters and numbers and are case sensitive. Only one promotion code can be applied to an order. 'Or' is assumed for each promotion code added to the list. Keep in mind that one promotion code can apply a combination of item, order, and shipping awards to the order.

To remove added promotion codes, select the code in the list and select the 'Remove' button.

See also

Applied Promo Code
Promotion Code = (Single Use)
Shipping Methods

Promotion Code = (Single Use)

Enter the promotion codes a user can apply to an order by importing them from a file, or by generating them.

Codes can contain any combination of letters and numbers and are case sensitive. Only one promotion code can be applied to an order. 'Or' is assumed for each promotion code added to the list. Keep in mind that one promotion code can apply a combination of item, order, and shipping awards to the order.

To import the promotion codes from a file, enter the name of the file and select "Import", or select "Browse", browse to and select the file, and then select "Import". Any text file can be imported, but there should be only one promotion code per line in the file.

To generate promotion codes, enter the number of codes to be generated, the number of characters in each code, and a prefix and suffix for the codes. Select "Generate" to generate the codes.

To view the codes that have been entered, select "Export". An Excel spreadsheet will be generated that contains the list of promotion codes.

See also

Applied Promo Code
Promotion Code =
Shipping Methods

Home > Site Manager by the Section > Experiences > User Groups > Checkout > Shipping Methods

Shipping Methods

Select the user's preferred shipping method during checkout.

If an order contains multiple shipments and at least one shipment uses the selected shipping method, the condition qualifies.

See also

Applied Promo Code
Promotion Code =
Promotion Code = (Single Use)

Home > Site Manager by the Section > Experiences > User Groups > Items In Cart/Current Order

Items In Cart/Current Order

Conditions listed in the 'Items in Cart/Current Order' folder are related to items in the user's Shopping Cart or their current order.

Articles in this section

- Address Subtotal
- Cart Subtotal
- Ensemble In Cart/Current Order
- Item Count in Cart/Current Order
- Items From Category in Cart/Current
- Product from Assortment in Cart/Current
- Product in Cart/Current Order
- Product/Variant Group in Cart/Current
- Variant in Cart/Current Order

See also

Checkout
Miscellaneous
Past Purchase Information
User Actions
User Info
Wish List

Address Subtotal

Enter a minimum and/or maximum dollar subtotal amount for each recipient address identified during Checkout. Minimum and maximum values are inclusive.

See also

Cart Subtotal
Ensemble In Cart/Current Order
Item Count in Cart/Current Order
Items From Category in Cart/Current Order
Product from Assortment in Cart/Current Order
Product in Cart/Current Order
Product/Variant Group in Cart/Current Order
Variant in Cart/Current Order

Home > Site Manager by the Section > Experiences > User Groups > Items In Cart/Current Order > Cart Subtotal

Cart Subtotal

Enter a minimum and/or maximum dollar amount for the Shopping Cart subtotal. Minimum and maximum values are inclusive.

The subtotal is the total of all items and quantities in the Shopping Cart including applied item promotions. Applied order discounts, estimated shipping, and applied shipping discounts are excluded from the Shopping Cart subtotal amount.

See also

Address Subtotal
Ensemble In Cart/Current Order
Item Count in Cart/Current Order
Items From Category in Cart/Current Order
Product from Assortment in Cart/Current Order
Product in Cart/Current Order
Product/Variant Group in Cart/Current Order
Variant in Cart/Current Order

Ensemble In Cart/Current Order

To enter one or more ensembles a user has in the shopping cart or current order, enter an ensemble ID and select the 'Add' button. If you do not know the ensemble ID, select the 'Select an ensemble' button to search for or to view a list of all ensembles and their IDs. Enter a quantity for the required quantity of products in the shopping cart or current order from each listed ensemble.

Users can have one or more products added from an ensemble in the shopping cart or current order.

To remove added ensembles, select the ensemble in the list and click the 'Remove' button.

See also

Address Subtotal
Cart Subtotal
Item Count in Cart/Current Order
Items From Category in Cart/Current Order
Product from Assortment in Cart/Current Order
Product in Cart/Current Order
Product/Variant Group in Cart/Current Order
Variant in Cart/Current Order

Item Count in Cart/Current Order

To identify the amount of items in the shopping cart or current order, select an empty shopping cart (0 items), a total item count that includes quantities, or a distinct item count that does not include quantities.

For the total and distinct item count, enter a minimum and maximum number. A maximum number is optional.

See also

Address Subtotal
Cart Subtotal
Ensemble In Cart/Current Order
Items From Category in Cart/Current Order
Product from Assortment in Cart/Current Order
Product in Cart/Current Order
Product/Variant Group in Cart/Current Order
Variant in Cart/Current Order

Home > Site Manager by the Section > Experiences > User Groups > Items In Cart/Current Order > Items From Category in Cart/Current Order

Items From Category in Cart/Current Order

Select one or more site sections, categories, and sub-categories from which a user has items in the shopping cart or current order. Click once in the list to select and click the 'Add' button to add to the selected categories list on the right.

Select a total quantity of items that must reside in any combination of the selected categories.

To remove added categories, select the category in the list on the right and click the 'Remove' button.

See also

Address Subtotal
Cart Subtotal
Ensemble In Cart/Current Order
Item Count in Cart/Current Order
Product from Assortment in Cart/Current Order
Product in Cart/Current Order
Product/Variant Group in Cart/Current Order
Variant in Cart/Current Order

Home > Site Manager by the Section > Experiences > User Groups > Items In Cart/Current Order > Product from Assortment in Cart/Current Order

Product from Assortment in Cart/Current Order

This user group condition allows you to select assortments containing items that users may have in their cart or current order.

Expand the folders on the left side of the properties pane until you see the assortment(s) you are interested in. Select the assortment(s), then select "Add". The assortment will be moved to the box on the right. When all the applicable assortments have been moved, enter a number in the "Quantity from any of the selected assortments" text field. This number is the number of items from the assortments that need to be in the user's cart or current order in order for them to satisy this user group condition.

See also

Address Subtotal
Cart Subtotal
Ensemble In Cart/Current Order
Item Count in Cart/Current Order
Items From Category in Cart/Current Order
Product in Cart/Current Order
Product/Variant Group in Cart/Current Order
Variant in Cart/Current Order

Product in Cart/Current Order

To enter one or more products a user has in the shopping cart or current order, enter a product ID and click the 'Add' button. If you do not know the product ID, click the 'Select a product' button to search for or to view a list of all products and their IDs. Select a quantity in the shopping cart or current order for each product listed.

To remove added products, select the product in the list and click the 'Remove' button.

See also

Address Subtotal
Cart Subtotal
Ensemble In Cart/Current Order
Item Count in Cart/Current Order
Items From Category in Cart/Current Order
Product from Assortment in Cart/Current Order
Product/Variant Group in Cart/Current Order
Variant in Cart/Current Order

Home > Site Manager by the Section > Experiences > User Groups > Items In Cart/Current Order > Product/Variant Group in Cart/Current Order

Product/Variant Group in Cart/Current Order

Enter one or more group names for products or variants a user has in the shopping cart or current order. Select each as a 'Variant' or 'Product' group. Product or variant groups are assigned a common term on the product management product or variant information pages. Select a quantity in the shopping cart or current order for each product or variant contained in each group listed.

To remove added groups, select the group in the list and click the 'Remove' button.

See also

Address Subtotal
Cart Subtotal
Ensemble In Cart/Current Order
Item Count in Cart/Current Order
Items From Category in Cart/Current Order
Product from Assortment in Cart/Current Order
Product in Cart/Current Order
Variant in Cart/Current Order

Variant in Cart/Current Order

To enter one or more variants a user has in the shopping cart or current order, enter a variant ID and click the 'Add' button. If you do not know the variant ID, click the 'Select a variant' button to search for or to view a list of variants and their IDs. Select a quantity in the shopping cart or current order for each variant listed.

To remove added variants, select the variant in the list and click the 'Remove' button.

See also

Address Subtotal
Cart Subtotal
Ensemble In Cart/Current Order
Item Count in Cart/Current Order
Items From Category in Cart/Current Order
Product from Assortment in Cart/Current Order
Product in Cart/Current Order
Product/Variant Group in Cart/Current Order

Home > Site Manager by the Section > Experiences > User Groups > Miscellaneous

Miscellaneous

Conditions listed in the 'Miscellaneous' folder cover a variety of conditions.

Articles in this section

Device Type
Inventory Level
Mobile App User
Mobile User
Relate Segment
Scanned Item
User List

See also

Checkout
Items In Cart/Current Order
Past Purchase Information
User Actions
User Info
Wish List

Home > Site Manager by the Section > Experiences > User Groups > Miscellaneous > Device Type

Device Type

The Device Type user group lets you select the device the user is using to view the site.

Select the device type.

See also

Inventory Level
Mobile App User
Mobile User
Relate Segment
Scanned Item
User List

Home > Site Manager by the Section > Experiences > User Groups > Miscellaneous > Inventory Level

Inventory Level

The Inventory Level user group allows you to choose the inventory level that must be met for a product, variant, product group, or product variant group.

To set the properties for this user group, determine the combinations of products, variants, product group, or variant group inventory levels that are desired.

1. To set the inventory level for a product:
   - Select the "Product" radio button.
   - Deselect the "Group" checkbox.
   - Select "Select an Item". A "Select Product" dialog box will appear.
   - Enter a search term in the dialog box.
   - Select a search method.
   - Select "Search". The lower portion of the dialog box will fill in with a list of matching products.
   - Select the product you wish to add to the user group.
   - Select "Select Product". The product will be added to the properties pane of the user group.
   - Select "Close". The "Select Product" dialog box will dismiss.
   - Use the "Condition" drop-down list box to select the comparison operator to use for the inventory level.
   - Enter the inventory level in the "Value" text field.
   - Select "Add". The condition will be added to the list of conditions at the bottom of the properties pane.
2. To set the inventory level for a product variant:
   - Select the "Variant" radio button.
   - Deselect the "Group" checkbox.
   - Select "Select an Item". A "Select Product Variant" dialog box will appear.
   - Enter a search term in the dialog box.
   - Select a search method.
   - Select "Search". The lower portion of the dialog box will fill in with a list of matching product variants.
   - Select the product variant you wish to add to the user group.
   - Select "Select Product Variant". The product variant will be added to the properties pane of the user group.
   - Select "Close". The "Select Product Variant" dialog box will dismiss.
   - Use the "Condition" drop-down list box to select the comparison operator to use for the inventory level.
   - Enter the inventory level in the "Value" text field.
   - Select "Add". The condition will be added to the list of conditions at the bottom of the properties pane.
3. To set the inventory level for a product group:
   - Select the "Product" radio button.
   - Select the "Group" checkbox.
   - In the "Name(s)" text field, enter the name(s) of the product group(s) you want included in the condition. Separate multiple names with commas.
   - Select "Any Items" if the inventory level any item in the product group(s) can be evaluated for the user group.
   - Select "All Items" if the inventory level of all items in the product group(s) should be evaluated for the user group.
   - Select "Sum of All Items" if the sum of the inventory level of all items in the product group(s) should be evaluated for the user group.
   - Use the "Condition" drop-down list box to select the comparison operator to use for the inventory level.
   - Enter the inventory level in the "Value" text field.
   - Select "Add". The condition will be added to the list of conditions at the bottom of the properties pane.
4. To set the inventory level for a product variant group:
   - Select the "Variant" radio button.
   - Select the "Group" checkbox.
   - In the "Name(s)" text field, enter the name(s) of the product variant group(s) you want included in the condition. Separate multiple names with commas.
   - Select "Any Items" if the inventory level any item in the product variant group(s) can be evaluated for the user group.
   - Select "All Items" if the inventory level of all items in the product variant group(s) should be evaluated for the user group.
   - Select "Sum of All Items" if the sum of the inventory level of all items in the product variant group(s) should be evaluated for the user group.
   - Use the "Condition" drop-down list box to select the comparison operator to use for the inventory level.
   - Enter the inventory level in the "Value" text field.
   - Select "Add". The condition will be added to the list of conditions at the bottom of the properties pane.
5. Repeat the above steps as appropriate to enter all the individual inventory level conditions.
6. Use the "User group is satisfied when" drop-down list box to select how many individual inventory level conditions must be met for the user group to satisfied.
   - Select "Any" if only one inventory level condition must be satisfied.
   - Select "All" if all of the inventory level conditions must be satisified.
7. Select "Save".

See also

Device Type
Mobile App User
Mobile User

Relate Segment
Scanned Item
User List

Mobile App User

Select whether or not the user is using a native mobile application to access the website.

See also

Device Type
Inventory Level
Mobile User
Relate Segment
Scanned Item
User List

Mobile User

Select whether or not the user is on a mobile device.

See also

Device Type
Inventory Level
Mobile App User
Relate Segment
Scanned Item
User List

Home > Site Manager by the Section > Experiences > User Groups > Miscellaneous > Relate Segment

Relate Segment

Enter the numeric identifier of the Relate Segment(s) the user is associated with. Select "Add" to add the segment to the list of segments for the user group.

To remove a segment, select the "Remove" icon next to it in the list of segments.

See also

Device Type
Inventory Level
Mobile App User
Mobile User
Scanned Item
User List

Home > Site Manager by the Section > Experiences > User Groups > Miscellaneous > Scanned Item

Scanned Item

Select whether or not the user has scanned an item with the mobile app.

See also

Device Type
Inventory Level
Mobile App User
Mobile User
Relate Segment
User List

Home > Site Manager by the Section > Experiences > User Groups > Miscellaneous > User List

User List

The User List user group works with files that contain lists of users. The files may be generated by reports run within the Site Manager or from external sources.

To set the properties for a User List user group, enter the name of the file containing the user information in the "File Name:" field, or browse to that file. Select the value in the "Type:" list that represents the type of user information that will be read into the user group. In the "Position:" field, enter the column position in the file of the user information. Select the "Import" button to import the data.

See also

Device Type
Inventory Level
Mobile App User
Mobile User
Relate Segment
Scanned Item

Past Purchase Information

Conditions listed in the 'Past Purchase Information' folder are related to the past purchase behavior of users. Past purchase information is known for non-registered users based on the life of the Web site session cookie. Information on registered members (those with an account) is known for an extended period of time.

Articles in this section

Number of Past Orders
Past Purchased Ensemble
Past Purchased Items From Category
Past Purchased Product
Past Purchased Variant
Past Subtotals

See also

Checkout
Items In Cart/Current Order
Miscellaneous
User Actions
User Info
Wish List

Home > Site Manager by the Section > Experiences > User Groups > Past Purchase Information > Number of Past Orders

Number of Past Orders

Enter a minimum and/or maximum number of orders placed in the past by a user. Both maximum and minimum are not required and each is inclusive.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Past Purchased Ensemble
Past Purchased Items From Category
Past Purchased Product
Past Purchased Variant
Past Subtotals

Past Purchased Ensemble

To enter one or more ensembles a user has included in past orders, enter an ensemble ID and click the 'Add' button. If you do not know the ensemble ID, click the 'Select an ensemble' button to search for or to view a list of ensembles and their IDs. Select a quantity in the Shopping Cart for each of the products in an ensemble listed.

Users can have one or more products added from an Ensemble in their past orders.

To remove added ensembles, select the ensemble in the list and click the 'Remove' button.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Number of Past Orders
Past Purchased Items From Category
Past Purchased Product
Past Purchased Variant
Past Subtotals

Past Purchased Items From Category

Select one or more site sections, categories, and sub-categories from which a user has items in the Shopping Cart. Click once in the list to select and click the 'Add' button to add to the selected categories list on the right.

Select a total quantity of items that must reside in any combination of the selected categories.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Number of Past Orders
Past Purchased Ensemble
Past Purchased Product
Past Purchased Variant
Past Subtotals

Past Purchased Product

To enter one or more products a user has included in past orders, enter a product ID and click the 'Add' button. If you do not know the product ID, click the 'Select a product' button to search for or to view a list of products and their IDs. Select a quantity purchased in the past for each product listed.

To remove added products, select the product in the list and click the 'Remove' button.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Number of Past Orders
Past Purchased Ensemble
Past Purchased Items From Category
Past Purchased Variant
Past Subtotals

Past Purchased Variant

To enter one or more variants a user has included in past orders, enter a variant ID and click the 'Add' button. If you do not know the variant ID, click the 'Select a variant' button to search for or to view a list of variants and their IDs. Select a quantity purchased in the past for each variant listed.

To remove added variants, select the variant in the list and click the 'Remove' button.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Number of Past Orders
Past Purchased Ensemble
Past Purchased Items From Category
Past Purchased Product
Past Subtotals

Past Subtotals

Enter a minimum and/or maximum aggregate dollar amount for past order subtotals. Both maximum and minimum are not required and each is inclusive.

The subtotal is the aggregate total of all items and quantities in all past orders including applied item promotions. Applied order discounts, estimated shipping, and applied shipping discounts are excluded from the past purchase subtotal amount.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Number of Past Orders
Past Purchased Ensemble
Past Purchased Items From Category
Past Purchased Product
Past Purchased Variant

Home > Site Manager by the Section > Experiences > User Groups > User Actions

User Actions

Conditions listed in the 'User Actions' folder are related to actions the user takes on the web site.

Articles in this section

Abandoned Cart	Account Action	Executes External Search	Executes Internal Search	On Country	On Language
On Locale	On Site	Returning Visitor	Selects Facebook Like	Submits Form	Views Category Page
Views Ensemble	Views Items From Category	Views Page	Views Product	Views Product Group	Views Store

See also

Checkout
Items In Cart/Current Order
Miscellaneous
Past Purchase Information
User Info
Wish List

Home > Site Manager by the Section > Experiences > User Groups > User Actions > Abandoned Cart

Abandoned Cart

Select whether a user has abandoned the Shopping Cart in the past number of days or between a specified start and end date.

If you select that a user has abandoned the Cart in the past number of days enter the minimum and maximum number of days since items have been added to the Cart and not purchased. Both minimum and maximum are required.

If you select a specified start and end date, both dates are required.

Every time a user adds or adjusts their Shopping Cart, the count starts over. Shopping Cart count data is maintained for three months from today's date. As a result, you cannot schedule a date beyond three months.

See also

Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

Home > Site Manager by the Section > Experiences > User Groups > User Actions > Account Action

Account Action

Select one of the following account actions on the Web site and whether the user has conducted the action or not.

Account Actions:

- Created an Account
- Logged In
- Updated Profile
- Added/Updated Credit Card
- Added/Updated Addresses
- Checked Order History
- Requested a Password
- Moved Wish List Items to Cart

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Abandoned Cart
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

Executes External Search

Select one or more referring search engines and enter one or more terms a user entered on an external search engine to find this Web site. For each entry, select 'starts with', 'contains', 'contains word', 'ends with', or 'exactly matches'.

To remove added terms, select the term in the list and click the 'Remove' button.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Abandoned Cart
Account Action
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

Home > Site Manager by the Section > Experiences > User Groups > User Actions > Executes Internal Search

Executes Internal Search

Enter one or more terms a user entered as a search term on the Web site. For each entry, select 'starts with', 'contains', 'contains word', 'ends with', or 'exactly matches'.

To remove added terms, select the term in the list and click the 'Remove' button.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Abandoned Cart
Account Action
Executes External Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

On Country

Select the country the user is associated with. Users on sites associated with this country will fulfill the user group.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

On Language

Select the language the user is associated with. Users on sites associated with this language will fulfill the user group.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

On Locale

Select the locale the user is on in the "Used in Locales" drop-down list box. Users coming from the selected locale will satisfy the user group.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

Home > Site Manager by the Section > Experiences > User Groups > User Actions > On Site

On Site

The site user group allows you to choose the site the user is on.

To set the properties for this user group, use the radio buttons to select the site.

Note: This user group is only available in multiple-site or multiple-tenant configurations.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

Home > Site Manager by the Section > Experiences > User Groups > User Actions > Returning Visitor

Returning Visitor

To define how often a user needs to visit the site, enter a number in the "Return Visit Count" text field. Select a comparator to define if the number of visits made by the user should be "equal" to, "greater than or equal to", "less than or equal to", "greater than", or "less than" the number you entered.

To define the time period the visits should have appeared in, select the "Timeframe Constraints" tab. Enter the information needed in the tab in order to define the time period.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

Selects Facebook Like

Select "Selects Facebook Like" to indicate that the user needs to select the Facebook Like button on a page to fulfill this user group. Select "Does not select Facebook Like" if not selecting the Facebook Like button on a page fulfills this user group.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

Submits Form

Select one of the following forms on the Web site and whether the user has submitted or has not submitted the form.

Forms:

- Catalog Quick Order
- Contact Us
- Email a Friend
- Order Status
- Email Sign Up/Opt Out
- Catalog Request

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

Home > Site Manager by the Section > Experiences > User Groups > User Actions > Views Category Page

Views Category Page

Select one or more site sections, categories, and sub-categories from which a user has viewed or clicked an item in. Click once in the list to select and click the 'Add' button to add to the selected categories list on the right.

To remove added categories, select the category in the list on the right and click the 'Remove' button.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

Views Ensemble

To enter one or more ensembles a user views on the Web site, enter an ensemble ID and click the 'Add' button. If you do not know the ensemble ID, click the 'Select an ensemble' button to search for or to view a list of ensemble IDs. Select a quantity viewed for each of the ensembles listed.

To remove added ensembles, select the ensemble in the list and click the 'Remove' button.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Items From Category
Views Page
Views Product
Views Product Group
Views Store

Views Items From Category

Select one or more site sections, categories, and sub-categories a user has viewed items from. Click once in the list to select and click the 'Add' button to add to the selected categories list on the right.

To remove added categories, select the category in the list on the right and click the 'Remove' button.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Page
Views Product
Views Product Group
Views Store

Views Page

Select one or more pages a user views on the Web site. Click once in the list to select and click the 'Add' button to add to the selected page list on the right.

To remove added pages, select the page in the list on the right and click the 'Remove' button.

Add a timeframe constraint. This could be the same as the experience timeframe, a start and end date, in the last number of specified days, or more than a specified number of days ago.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Product
Views Product Group
Views Store

Home > Site Manager by the Section > Experiences > User Groups > User Actions > Views Product

Views Product

To enter one or more products a user views on the Web site, enter a product ID and click the 'Add' button. If you do not know the product ID, click the 'Select a product' button to search for or to view a list of products and their IDs. Select a quantity viewed for each of the products listed.

To remove added products, select the product in the list and click the 'Remove' button.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product Group
Views Store

Home > Site Manager by the Section > Experiences > User Groups > User Actions > Views Product Group

Views Product Group

Enter one or more group names for products a user views. Product groups are assigned a common term on the product management product information pages to group them.

To remove added groups, select the group in the list and click the 'Remove' button.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Store

Home > Site Manager by the Section > Experiences > User Groups > User Actions > Views Store

Views Store

This user group examines whether or not a customer has visited a store detail page on the web site. It contains a list of stores whose detail pages the customer can visit in order to fulfill the user group.

There are two ways to add a store to the list of store details page the customer views on the web site:

1. Enter the store id and select "Add".
2. Select "Select a Store". In the pop-up tht appears, select the search criteria for the store and enter the search term, then select "Search". In the results list, select the store(s) you want to add and select "Add Selected Stores". Select "Close" to close the pop-up.

To remove a store from the list of stores, select the "Remove" icon to the right of the store.

See also

Abandoned Cart
Account Action
Executes External Search
Executes Internal Search
On Country
On Language
On Locale
On Site
Returning Visitor
Selects Facebook Like
Submits Form
Views Category Page
Views Ensemble
Views Items From Category
Views Page
Views Product
Views Product Group

Home > Site Manager by the Section > Experiences > User Groups > User Info

User Info

Conditions listed in the 'User Info' folder are related to information about the user.

Articles in this section

- Billing Country
- Billing State
- Billing Zip Code
- Business Partner Account
- Email Domain
- Email Preference
- Geolocation
- Loyalty Membership
- Loyalty Points Balance
- Originating URL
- Shipping Country
- User Country Code
- User Membership

See also

Checkout
Items In Cart/Current Order
Miscellaneous
Past Purchase Information
User Actions
Wish List

Home > Site Manager by the Section > Experiences > User Groups > User Info > Billing Country

Billing Country

Use the drop-down list box to select the country of the billing address of the user. Users with billing addresses not in the selected country will not satisfy the user group.

See also

Billing State
Billing Zip Code
Business Partner Account
Email Domain
Email Preference
Geolocation
Loyalty Membership
Loyalty Points Balance
Originating URL
Shipping Country
User Country Code
User Membership

Home > Site Manager by the Section > Experiences > User Groups > User Info > Billing State

Billing State

Select one or more billing states and click the 'Add' button to add to added billing state list below. Select to 'include any' or 'exclude all' for all states added.

To remove added billing states, select the billing state in the list and click the 'Remove' button.

See also

Billing Country
Billing Zip Code
Business Partner Account
Email Domain
Email Preference
Geolocation
Loyalty Membership
Loyalty Points Balance
Originating URL
Shipping Country
User Country Code
User Membership

Home > Site Manager by the Section > Experiences > User Groups > User Info > Billing Zip Code

Billing Zip Code

Enter one or more billing zip codes. You can select a range by entering a minimum and a maximum. To enter only one zip code, use the box labeled 'min.' Click the 'Add' button to add to added billing zip code list below. Select to 'include any' or 'exclude all' for all zip codes added.

To remove added billing zip codes, select the zip code in the list and click the 'Remove' button.

See also

Billing Country
Billing State
Business Partner Account
Email Domain
Email Preference
Geolocation
Loyalty Membership
Loyalty Points Balance
Originating URL
Shipping Country
User Country Code
User Membership

Business Partner Account

Enter the business partner account(s) the user is associated with. Enter them by entering the account ID and selecting "Add", or selecting "Select an Account" and searching for accounts.

To remove a business partner account, select the "Remove" icon.

See also

Billing Country
Billing State
Billing Zip Code
Email Domain
Email Preference
Geolocation
Loyalty Membership
Loyalty Points Balance
Originating URL
Shipping Country
User Country Code
User Membership

Email Domain

Enter one or more email domains. An email domain is located at the end of a user's email address after the @ sign (e.g. jsmith@emaildomain.com). Select 'contains', 'ends in', 'exactly matches', or 'starts with' for each domain added.

To remove added email domains, select the domain in the list and click the 'Remove' button.

See also

Billing Country
Billing State
Billing Zip Code
Business Partner Account
Email Preference
Geolocation
Loyalty Membership
Loyalty Points Balance
Originating URL
Shipping Country
User Country Code
User Membership

Home > Site Manager by the Section > Experiences > User Groups > User Info > Email Preference

Email Preference

Select if a user has opted to receive emails via various methods on the Web site such as the Email Sign Up page or during checkout.

See also

Billing Country
Billing State
Billing Zip Code
Business Partner Account
Email Domain
Geolocation
Loyalty Membership
Loyalty Points Balance
Originating URL
Shipping Country
User Country Code
User Membership

Home > Site Manager by the Section > Experiences > User Groups > User Info > Geolocation

Geolocation

Select whether users will be grouped by state/province or zip code.

If defining the users by state/province, select each state/province in the drop-down list box, then select "include any" to include any users from that state/province, or "exclude all" to exclude all users from that state/province. Select "Add" to add that state/province to the list of selected state/provinces.

If defining the users by zip code, enter a comma separated list of zip codes. Select "Include Any" to include users in any of the zip codes listed, or "Exclude All" to exclude all users from any of the zip codes. Select "Add" to add that list of zip codes to the list of selected zip codes.

See also

Billing Country
Billing State
Billing Zip Code
Business Partner Account
Email Domain
Email Preference
Loyalty Membership
Loyalty Points Balance
Originating URL
Shipping Country
User Country Code
User Membership

Home > Site Manager by the Section > Experiences > User Groups > User Info > Loyalty Membership

Loyalty Membership

Select whether or not the user needs to be a member of the loyalty rewards program.

See also

Billing Country
Billing State
Billing Zip Code
Business Partner Account
Email Domain
Email Preference
Geolocation
Loyalty Points Balance
Originating URL
Shipping Country
User Country Code
User Membership

Home > Site Manager by the Section > Experiences > User Groups > User Info > Loyalty Points Balance

Loyalty Points Balance

Enter a value for the minimum and maximum number of points in the loyalty rewards program that a member can have.

See also

Billing Country
Billing State
Billing Zip Code
Business Partner Account
Email Domain
Email Preference
Geolocation
Loyalty Membership
Originating URL
Shipping Country
User Country Code
User Membership

Originating URL

Enter one or more originating URLs. An originating URL is the web site URL the user was on when they selected a link to come to your web site.

For each entry, select whether the URL of the site your visitor is coming from 'exactly matches,' 'contains,' 'starts with,' or 'ends with' the "URL Name" entered for the entry.

Select to 'include any' or 'exclude all' for all of the URLs added.

To remove added URLs, select the URL in the list and select the 'Remove' button.

Note: Special care needs to be taken when creating the inbound links for these experiences. Each inbound link should be appended with the following string: "affiliate_entry.cmd". Appending "affliate_entry.cmd" to the linke allows the site to capture the referrer information and place it in the user's session.

Examples:

- http://www.site.com/affiliate_entry.cmd - This url will automatically redirect the customer to the home page, after capturing the referrer information in the user’s session.
- http://www.site.com/affiliate_entry.cmd?redirectURL=/thumbnail/Apparel/Mens/Shirts/pc/101/c/109/103.uts - This URL, with the "redirectURL=” parameter, redirects the user to the page you specify after capturing the referrer information in the user's session.
- http://www.site.com/affiliate_entry.cmd?affiliateURL=optionalname&redirectURL=/thumbnail/Apparel/Mens/Shirts/pc/101/c/109/103.uts - The third URL, with the "redirectURL=” and the "affiliateURL=” will redirect plus will override a specified value into the referrer name. This last way no longer has the benefit of capturing the true originating URL from the referrer, if the link is re-posted elsewhere. It’s there as an option for occasions when you want to allow customers to get the experience if they link from a re-posted location, but still capture some campaign ID information.

See also

Billing Country
Billing State
Billing Zip Code
Business Partner Account
Email Domain
Email Preference
Geolocation
Loyalty Membership
Loyalty Points Balance
Shipping Country
User Country Code
User Membership

Home > Site Manager by the Section > Experiences > User Groups > User Info > Shipping Country

Shipping Country

Use the drop-down list box to select the country of the shipping address of the user. Users with shipping addresses not in the selected country will not satisfy the user group.

See also

Billing Country
Billing State
Billing Zip Code
Business Partner Account
Email Domain
Email Preference
Geolocation
Loyalty Membership
Loyalty Points Balance
Originating URL
User Country Code
User Membership

User Country Code

Enter one or more country codes by entering the code and selecting the 'Add' button.

Country codes can contain any combination of letters and numbers and are case sensitive. If multiple country codes are entered, users need to belong to only one of the countries in order to satisfy the conditions of the user group.

To remove a country code, select the code in the list and select the 'Remove' button.

See also

Billing Country
Billing State
Billing Zip Code
Business Partner Account
Email Domain
Email Preference
Geolocation
Loyalty Membership
Loyalty Points Balance
Originating URL
Shipping Country
User Membership

User Membership

Select if a user is or is not a registered member. Registered members have an account on the Web site.

See also

Billing Country
Billing State
Billing Zip Code
Business Partner Account
Email Domain
Email Preference
Geolocation
Loyalty Membership
Loyalty Points Balance
Originating URL
Shipping Country
User Country Code

Wish List

Conditions listed in the 'Wish List' folder are related to items in users' Wish Lists. Wish Lists are only available to registered members of the Web site.

Articles in this section

Ensemble in Wish List
Item Count in Wish List
Items from Category in Wish List
Product in Wish List
Product/Variant Group in Wish List
Variant in Wish List

See also

Checkout
Items In Cart/Current Order
Miscellaneous
Past Purchase Information
User Actions
User Info

Home > Site Manager by the Section > Experiences > User Groups > Wish List > Ensemble in Wish List

Ensemble in Wish List

To enter one or more ensembles a user has in the Wish List, enter an ensemble ID and click the 'Add' button. If you do not know the ensemble ID, click the 'Select an ensemble' button to search for or to view a list of all ensembles and their IDs. Select a quantity in the Shopping Cart for required quantity of products in the Wish List from each listed ensemble.

Users can have one or more products added from an Ensemble in the Wish List.

To remove added ensembles, select the ensemble in the list and click the 'Remove' button.

See also

Item Count in Wish List
Items from Category in Wish List
Product in Wish List
Product/Variant Group in Wish List
Variant in Wish List

Item Count in Wish List

To identify the amount of items in the Wish List, select an empty Wish List (0 items), a total item count that includes quantities, or a distinct item count that does not include quantities. For the total and distinct item count, enter a minimum and maximum number. A maximum number is optional.

See also

Ensemble in Wish List
Items from Category in Wish List
Product in Wish List
Product/Variant Group in Wish List
Variant in Wish List

Items from Category in Wish List

Select one or more site sections, categories, and sub-categories from which a user has items in the Wish List. Click once in the list to select and click the 'Add' button to add to the selected categories list on the right.

Select a total quantity of items that must reside in any combination of the selected categories.

To remove added categories, select the category in the list on the right and click the 'Remove' button.

See also

Ensemble in Wish List
Item Count in Wish List
Product in Wish List
Product/Variant Group in Wish List
Variant in Wish List

Home > Site Manager by the Section > Experiences > User Groups > Wish List > Product in Wish List

Product in Wish List

To enter one or more products a user has in the Wish List, enter a product ID and click the 'Add' button. If you do not know the product ID, click the 'Select a product' button to search for or to view a list of products and their IDs. Select a quantity in the Shopping Cart for each product listed.

To remove added products, select the product in the list and click the 'Remove' button.

See also

Ensemble in Wish List
Item Count in Wish List
Items from Category in Wish List
Product/Variant Group in Wish List
Variant in Wish List

Home > Site Manager by the Section > Experiences > User Groups > Wish List > Product/Variant Group in Wish List

Product/Variant Group in Wish List

Enter one or more group names for products or variants a user has in the Wish List. Select each as a 'Variant' or 'Product' group. Product or variant groups are assigned a common term on the product management product or variant information pages. Select a quantity in the Wish List for each product or variant contained in each group listed.

To remove added groups, select the group in the list and click the 'Remove' button.

See also

Ensemble in Wish List
Item Count in Wish List
Items from Category in Wish List
Product in Wish List
Variant in Wish List

Variant in Wish List

To enter one or more variants a user has in the Wish List, enter a variant ID and click the 'Add' button. If you do not know the variant ID, click the 'Select a variant' button to search for or to view a list of variants and their IDs. Select a quantity in the Wish List for each variant listed.

To remove added variants, select the variant in the list and click the 'Remove' button.

See also

Ensemble in Wish List
Item Count in Wish List
Items from Category in Wish List
Product in Wish List
Product/Variant Group in Wish List

Home > Site Manager by the Section > Experiences > Targeted Content

Targeted Content

Targeted content is made up of content assets and their associated formats (ways to display the asset), along with the page and area on the page that the content will appear in.

Targeted content in the body of an experience has two options for connection points: user views (the user reaches a page the content is on or is delivered the content on the page they are viewing as part of user segmentation) or the user clicks (if a URL is assigned to the content and the user clicks on it to go to another destination). If a site is using the mobile application, a third connection point will be available: plays game. This connection point will be considered "true" and will be used if the targeted content is a mobile application game and the user plays the game. (Note: Implementation teams and clients will need to ensure that any client using the mobile application games feature modifies it to comply with all local, state, and/or federal laws regarding promotions.)

To schedule targeted content by area:

1. From the left navigation pane, select the area the content should appear in and drag that area into the experience.
2. In the properties pane for the content, select the "Formats" tab and select the type of asset and its format.
3. Select the "Properties" tab and enter the content that should appear.
4. Make adjustments in the "Timeframe" and "Rank" tabs as needed.
5. Follow the steps below for saving, previewing, and activating the content.

To schedule targeted content by format:

1. From the left navigation pane, select the asset and the format that you want to use for the content. Drag that format into the experience.
2. In the "Properties" tab of the properties pane, select or enter the content that should appear on the page.
3. In the "Areas" tab, select the page and the page area that the content should appear on.
4. Make adjustments in the "Timeframe" and "Rank" tabs as needed.
5. Follow the steps below for saving, previewing, and activating the content.

To preview content:

1. Select the content in the experience that you wish to preview.
2. Select the "Format Preview" tab in the properties pane to see a preview of the content.
3. Select the "Preview in Page" button in the properties pane to see a preview of the content on the page it will appear on.

To save content:

1. Enter information for the targeted content in the tabs in the properties pane.
2. Select the "Save" button.
3. If any errors are indicated, correct the errors and select "Save" again.

To change the working status of content:

1. Select the drop-down box near the top of the properties pane. Change the status to the appropriate status. Note that setting the status to "Approved" will also activate the content.

To activate content:

1. Follow the steps above to change the working status to "Approved", or select the "Activate" button.

To deactivate content:

1. Follow the steps above to change the working status to "Declined", or select the "Deactivate" button.

Articles in this section

Areas

Formats

Targeted Content Properties Tabs

See also

All Experiences
User Groups
Awards
Email Templates

Home > Site Manager by the Section > Experiences > Targeted Content > Areas

Areas

Areas are used to define where the targeted content displays on the page.

The top folder in this section will list the sections defined for the site, the next level down will list the pages defined for the section, and the level below that will list the area(s) on a page.

Select the area that the targeted content should appear in and add the area to the experience by dragging it to the appropriate place in the experience. Enter its properties on the "Properties" tab.

See also

Formats
Targeted Content Properties Tabs

Home > Site Manager by the Section > Experiences > Targeted Content > Formats

Formats

Formats are various ways of displaying content assets. Each format applies to a specific type of asset, so when a format is added to an experience, an asset is also added.

The top level folders in this section list the types of assets that can be used on a page. Within each asset folder is a set of formats for that asset, which define how the asset should be displayed.

Select the desired format and drag it into the appropriate place in the experience. Enter its properties on the "Properties" tab.

Articles in this section

Article
Category
Ensemble
Flash
Image
Image Map
Item Slider
Link
Link Collection
Product
Product/Ensemble Collection
Rich Text
Text
Video

See also

Areas
Targeted Content Properties Tabs

Article

Article formats are various ways to display information about an article on the Web site.

See also

Category
Ensemble
Flash
Image
Image Map
Item Slider
Link
Link Collection
Product
Product/Ensemble Collection
Rich Text
Text
Video

Home > Site Manager by the Section > Experiences > Targeted Content > Formats > Category

Category

Category formats are various ways to display information about a category on the Web site.

See also

Article
Ensemble
Flash
Image
Image Map
Item Slider
Link
Link Collection
Product
Product/Ensemble Collection
Rich Text
Text
Video

Home > Site Manager by the Section > Experiences > Targeted Content > Formats > Ensemble

Ensemble

Ensemble formats are various ways to display information about an ensemble on the Web site.

See also

Article
Category
Flash
Image
Image Map
Item Slider
Link
Link Collection
Product
Product/Ensemble Collection
Rich Text
Text
Video

Flash

The flash asset allows you to add Flash to the Web site.

See also

Article
Category
Ensemble
Image
Image Map
Item Slider
Link
Link Collection
Product
Product/Ensemble Collection
Rich Text
Text
Video

Image

Image formats are various ways to display an image.

See also

Article
Category
Ensemble
Flash
Image Map
Item Slider
Link
Link Collection
Product
Product/Ensemble Collection
Rich Text
Text
Video

Image Map

The image map formats allows users to select an image and draw circular, rectangular, or polygonal hotspots on the image.

Coordinates are created automatically for each hotspot you add. A URL can be defined (specifying whether the link contains the root URL or not) and you can move the hotspots you have created by selecting and dragging. Additionally, you can copy a hotspot by selecting it and holding down your CTRL key and then dragging. When you release you will see a copy of the hotspot.

The first set of numbers at the top right show your cursor location or dragged shape coordinates and the small triangle at the right and additional numbers shows the size of your created shape or the difference in coordinates from where you have dragged.

Note: The image map asset functions slightly different in IE in that you cannot move and copy as described above.

See also

Article
Category
Ensemble
Flash
Image
Item Slider
Link
Link Collection
Product
Product/Ensemble Collection
Rich Text
Text
Video

Item Slider

Item slider formats are ways to display items from an assortment in a scrollable area.

See also

Article
Category
Ensemble
Flash
Image
Image Map
Link
Link Collection
Product
Product/Ensemble Collection
Rich Text
Text
Video

Link

Link formats are various ways to display a link asset.

See also

Article
Category
Ensemble
Flash
Image
Image Map
Item Slider
Link Collection
Product
Product/Ensemble Collection
Rich Text
Text
Video

Link Collection

Link Collection formats are various ways to display a link collection.

See also

Article
Category
Ensemble
Flash
Image
Image Map
Item Slider
Link
Product
Product/Ensemble Collection
Rich Text
Text
Video

Home > Site Manager by the Section > Experiences > Targeted Content > Formats > Product

Product

Product formats are various ways to display information about a product on the Web site.

See also

Article
Category
Ensemble
Flash
Image
Image Map
Item Slider
Link
Link Collection
Product/Ensemble Collection
Rich Text
Text
Video

Home > Site Manager by the Section > Experiences > Targeted Content > Formats > Product/Ensemble Collection

Product/Ensemble Collection

Product/Ensemble collection formats are various ways of displaying multiple products/ensembles on the Web site.

See also

Article
Category
Ensemble
Flash
Image
Image Map
Item Slider
Link
Link Collection
Product
Rich Text
Text
Video

Rich Text

The rich text format allows you to format text to appear on the Web site.

See also

Article
Category
Ensemble
Flash
Image
Image Map
Item Slider
Link
Link Collection
Product
Product/Ensemble Collection
Text
Video

Home > Site Manager by the Section > Experiences > Targeted Content > Formats > Text

Text

Text formats are various ways to display HTML text.

See also

Article
Category
Ensemble
Flash
Image
Image Map
Item Slider
Link
Link Collection
Product
Product/Ensemble Collection
Rich Text
Video

Video

Video formats are various ways to display videos.

See also

Article
Category
Ensemble
Flash
Image
Image Map
Item Slider
Link
Link Collection
Product
Product/Ensemble Collection
Rich Text
Text

Home > Site Manager by the Section > Experiences > Targeted Content > Targeted Content Properties Tabs

Targeted Content Properties Tabs

Each Targeted Content item that is added to an experience has a number of properties associated with it. Those properties appear on tabbed panes at the bottom of the page. Information on each tabbed pane is included in this section.

Articles in this section

Properties Formats Area Timeframe Rank Format Preview

See also

Areas
Formats

Properties

The content of the properties tab varies based on which asset format has been selected.

Use the fields in the properties tab to select or enter the asset that will be displayed as the targeted content. Fill in the fields as desired to configure how the asset will be displayed.

See also

Formats
Area
Timeframe
Rank
Format Preview

Home > Site Manager by the Section > Experiences > Targeted Content > Targeted Content Properties Tabs > Formats

Formats

Formats are various ways of displaying content assets. Select one and enter its properties on the "Properties" tab.

See also

Properties
Area
Timeframe
Rank
Format Preview

Area

Areas are where the targeted content displays on the page. Select a page to see available targeted content areas.

See also

Properties
Formats
Timeframe
Rank
Format Preview

Timeframe

Enter a start and or end date for the targeted content. If no start or end date is specified, the start date will be immediate and end date will be indefinite.

Start and end date cannot precede or exceed that set for the experience. Adjust the experience timeframe if you would like to schedule this targeted content timeframe outside of the start and end date scheduled for the experience.

See also

Properties
Formats
Area
Rank
Format Preview

Home > Site Manager by the Section > Experiences > Targeted Content > Targeted Content Properties Tabs > Rank

Rank

The rank tab lists competing content scheduled for the same area and overlapping timeframe. The current content is listed in red. Adjust the order of the current content only.

See also

Properties
Formats
Area
Timeframe
Format Preview

Format Preview

The format preview tab is disabled until the contents of the properties tab have been saved. When viewed, the format preview tab shows a preview of the scheduled content at its accurate size with the format applied and with no area context reflected.

See also

Properties
Formats
Area
Timeframe
Rank

Home > Site Manager by the Section > Experiences > Awards

Awards

There are three types of awards that can be assigned:

- Item
- Order
- Shipping

Awards in the body of an experience have two options for connection points: user qualifies and user redeems.

To add an award to an experience:

1. From the left navigation pane, select the award and drag it into the experience.
2. In the properties pane for the award, select the the tab that matches the name of the award and enter the properties for it.
3. Make adjustments in the "Timeframe", "Related Award Properties", and "Rank" tabs as needed.
4. Follow the steps below for saving and activating the award.

To save an award:

1. Enter information for the award in the tabs in the properties pane.
2. Select the "Save" button.
3. If any errors are indicated, correct the errors and select "Save" again.

To change the working status of an award:

1. Select the drop-down box near the top of the properties pane. Change the status to the appropriate status. Note that setting the status to "Approved" will also activate the content.

To activate an award:

1. Follow the steps above to change the working status to "Approved", or select the "Activate" button.

To deactivate an award:

1. Follow the steps above to change the working status to "Declined", or select the "Deactivate" button.

Articles in this section

Item Level Awards
Order Level Awards
Shipping Awards
Award Properties Tabs

See also

All Experiences
User Groups
Targeted Content
Email Templates

Item Level Awards

Item awards are discounts on product and ensembles.

Articles in this section

- Assortment Items - Fixed Price, $ or Percentage Off
- Category - $ or Percentage Off
- Ensemble - $ or Percentage Off
- Product - Fixed Price, $ or Percentage Off
- Product Variant - $ or Percentage Off
- Product Variant Group - Fixed Price, $ or

See also

Order Level Awards
Shipping Awards
Award Properties Tabs

Home > Site Manager by the Section > Experiences > Awards > Item Level Awards > Assortment Items - Fixed Price, $ or Percentage Off

Assortment Items - Fixed Price, $ or Percentage Off

To set the properties for this award:

1. Select "$ off item", "% off item", or "Fixed price ($)".
2. Enter the amount to be deducted from the item(s) in the "$ off" or % off" box.
3. Enter the maximum number of items that this award can be applied to in the "Quantity" box.
4. Select the assortments the items can be from in the left hand tree structure. Select "Add" to move those assortments to the right.

Note: This award cannot be logically used with the following user group condition(s):

- Cart Subtotal
- Address Subtotal

The cart and address subtotals are dependent on the aggregate price total of all items. As a result, neither the shopping cart subtotal nor address subtotal can trigger an item price change.

See also

Category - $ or Percentage Off
Ensemble - $ or Percentage Off
Product - Fixed Price, $ or Percentage Off
Product Variant - $ or Percentage Off
Product Variant Group - Fixed Price, $ or Percentage Off

Category - $ or Percentage Off

Select a $ or % to take off one or more products in specified categories in the shopping cart.

Quantity is the number of products from any specified category that the award will be applied to. Minimum must be '1' to apply.

Note: This award cannot be logically used with the following user group condition(s):

- Cart Subtotal
- Address Subtotal

The cart and address subtotals are dependent on the aggregated price total of all items. As a result, neither the shopping cart subtotal nor address subtotal can trigger an item price change.

See Also

Assortment Items - Fixed Price, $ or Percentage Off
Ensemble - $ or Percentage Off
Product - Fixed Price, $ or Percentage Off
Product Variant - $ or Percentage Off
Product Variant Group - Fixed Price, $ or Percentage Off

Home > Site Manager by the Section > Experiences > Awards > Item Level Awards > Ensemble - $ or Percentage Off

Ensemble - $ or Percentage Off

To set the properties for this award:

1. Select "$ off ensemble" or "% off ensemble".
2. Enter the amount to be deducted from the ensemble(s) in the "$ off" or "% off" box.
3. Enter the maximum number of products in the combined specified ensembles that the award can be applied to. The quantity must be a minimum of '1' for the award to apply.
4. Enter the ensemble(s) the discount applies to by either entering an ensemble ID and selecting the "Add" button, or by selecting the "Select Ensemble" button. The "Select Ensemble" button will allow you to search for ensembles or to view a list of all ensembles and their IDs.
5. To remove an ensemble from the list, select the ensemble and select the "Remove Selected Ensembles" button.

Note: This award cannot be logically used with the following user group condition(s):

- Cart Subtotal
- Address Subtotal

The cart and address subtotals are dependent on the aggregate price total of all items. As a result, neither the shopping cart subtotal nor address subtotal can trigger an item price change.

See also

Assortment Items - Fixed Price, $ or Percentage Off
Category - $ or Percentage Off
Product - Fixed Price, $ or Percentage Off
Product Variant - $ or Percentage Off
Product Variant Group - Fixed Price, $ or Percentage Off

Home > Site Manager by the Section > Experiences > Awards > Item Level Awards > Product - Fixed Price, $ or Percentage Off

Product - Fixed Price, $ or Percentage Off

To set the properties for this award:

1. Select "$ off product" or "% off product".
2. Enter the amount to be deducted from the product(s) in the "$ off" or % off" box.
3. Enter the maximum number of products that this award can be applied to.
4. Enter the product(s) the discount applies to by either entering a product ID and selecting the "Add" button, or by selecting the "Select Products" button. The "Select Products" button will allow you to search for or to view a list of all products and their IDs.
5. To remove a product from the list, select the product and select the "Remove Selected Products" button.

Note: This award cannot be logically used with the following user group condition(s):

- Cart Subtotal
- Address Subtotal

The cart and address subtotals are dependent on the aggregate price total of all items. As a result, neither the shopping cart subtotal nor address subtotal can trigger an item price change.

See also

Assortment Items - Fixed Price, $ or Percentage Off
Category - $ or Percentage Off
Ensemble - $ or Percentage Off
Product Variant - $ or Percentage Off
Product Variant Group - Fixed Price, $ or Percentage Off

Product Variant - $ or Percentage Off

To set the properties for this award:

1. Select "$ off variant" or "% off variant".
2. Enter the amount to be deducted from the product variant(s) in the "$ off" or % off" box.
3. Enter a quantity for the product variant(s). The quantity is the maximum number of product variants that the award can be applied to. The quantity must be a minimum of '1' for the award to apply.
4. Enter the variant id(s) the discount applies to and then select "Add". If you do not know the variant id, select "Select Variants" to search for or view a list of all the product variants and their ids.
5. To remove a product variant from the list, select the product variant and select the "Remove Selected Variants" button.

Note: This award cannot be logically used with the following user group condition(s):

- Cart Subtotal
- Address Subtotal

The cart and address subtotals are dependent on the aggregate price total of all items. As a result, neither the shopping cart subtotal nor address subtotal can trigger an item price change.

See also

Assortment Items - Fixed Price, $ or Percentage Off
Category - $ or Percentage Off
Ensemble - $ or Percentage Off
Product - Fixed Price, $ or Percentage Off
Product Variant Group - Fixed Price, $ or Percentage Off

Home > Site Manager by the Section > Experiences > Awards > Item Level Awards > Product Variant Group - Fixed Price, $ or Percentage Off

Product Variant Group - Fixed Price, $ or Percentage Off

To set the properties for this award:

1. Select the desired method of discount: "$ off all products/variants in group", "% off all products/variants in group", or "Fixed price($)".
2. Enter the amount to be deducted from the product(s)/variant(s) in the "$ off", "% off", or "Fixed ($)" box.
3. Enter a quantity for the product(s)/variant(s). The quantity is the maximum number of products from the specified product/variant group(s) that the award will be applied to each time the requirements for the award are met. The quantity must be a minimum of '1' for the award to apply.
4. Select "Product" or "Variant".
5. In the "Included Groups" group box, enter information on the groups that this award can be applied to:
    - Enter the name of the group in the "Group" text box.
    - Select "Add".
6. In the "Excluded Groups" group box, enter information for any groups that this award may not be applied to:
    - Enter the name of the group in the "Group" text box.
    - Select "Add".

Note: This award cannot be logically used with the following user group condition(s):

- Cart Subtotal
- Address Subtotal

The cart and address subtotals are dependent on the aggregate price total of all items. As a result, neither the shopping cart subtotal nor address subtotal can trigger an item price change.

See also

Assortment Items - Fixed Price, $ or Percentage Off
Category - $ or Percentage Off
Ensemble - $ or Percentage Off
Product - Fixed Price, $ or Percentage Off
Product Variant - $ or Percentage Off

Order Level Awards

Order awards are discounts on the order total.

Articles in this section

Free Gift

Free Product

Gift Wrap - $ or Percentage Off

Order - $ or Percentage Off

See also

Item Level Awards
Shipping Awards
Award Properties Tabs

Free Gift

To set the properties for this award:

1. Select a quantity for the maximum number of free gifts that can be awarded to an order.
2. Enter the product variant for the free gift. If you know the SKU or variant ID, enter either one in the entry field, select the appropriate button beneath the field, and select "Search". The product variant will appear at the bottom of the tab. If you do not know the SKU or ID of the variant, select "View All Product Variants". The bottom of the tab will be refreshed with a listing of all of the product variants.
3. Select the product variant listing at the bottom of the tab that will be the free product variant and then select "Select Product Variant".

See also

Free Product
Gift Wrap - $ or Percentage Off
Order - $ or Percentage Off

Free Product

To set the properties for this award:

1. Select a quantity for the maximum number of free products that can be awarded to an order.
2. Enter the search string and select the appropriate button beneath the field, and click "Search". The products will appear at the bottom of the tab. You can also select "View All Product", and the bottom of the tab will be refreshed with a listing of all of the products.
3. Select the product listing at the bottom of the tab that will be the free product and then select "Select Product".

See also

Free Gift
Gift Wrap - $ or Percentage Off
Order - $ or Percentage Off

Gift Wrap - $ or Percentage Off

To set the properties for this award:

1. Enter "$ off order" or "% off order".
2. Enter the amount to be deducted from the order in the "$ off" or "% off" box.

See also

Free Gift
Free Product
Order - $ or Percentage Off

Home > Site Manager by the Section > Experiences > Awards > Order Level Awards > Order - $ or Percentage Off

Order - $ or Percentage Off

To set the properties for this award:

1. Select "$ off order" or "% off order".
2. Enter the amount to be deducted from the order in the "$ off" or "% off" box.

See also

Free Gift
Free Product
Gift Wrap - $ or Percentage Off

Home > Site Manager by the Section > Experiences > Awards > Shipping Awards

Shipping Awards

Shipping awards are discounts on shipping.

Articles in this section

Free - Flat Fee - $ or Percentage Off

Item Shipped Free or Flat Fee

Shipping Upgrade

See also

Item Level Awards
Order Level Awards
Award Properties Tabs

Free - Flat Fee - $ or Percentage Off

To set the properties for this award:

1. Select the type of shipping discount - free shipping, $ off, % off, or $ fixed shipping.
2. If you chose $ off or % off, enter the discount amount in the "$ off" or "% off" box.
3. If you chose $ fixed shipping, enter the flat rate shipping price in the "$ Fixed" box.
4. Select the type of shipping the discount applies to.

See also

Item Shipped Free or Flat Fee
Shipping Upgrade

Item Shipped Free or Flat Fee

To set the properties for this award:

1. Select "Free" or "Flat Fee" shipping.
2. If "Flat Fee" is selected, entered the shipping rate in the "$" box.
3. Select the "Shipping Method" the award applies to.
4. Select "Any Product" if the shipping award can be applied to any product.
5. Select "Included Products" if the shipping award can only be applied to certain products.
    - If the ID of the product is known, enter the product ID of a product in the "Product ID" field and select "Add". The product will be added to the list at the bottom.
    - If the ID of the product is not known, select "Select Products". A window will appear. You may search for products in the window or display all the products. Select the products the award will apply to from the list of products, then select "Add Selected Products". A message will appear saying the products have been added. Select "Close" to close the window.
    - To remove a product from the list, select the product, then select "Remove Selected Product".

See also

Free - Flat Fee - $ or Percentage Off
Shipping Upgrade

Home > Site Manager by the Section > Experiences > Awards > Shipping Awards > Shipping Upgrade

Shipping Upgrade

To set the properties for this award:

1. Select the type of shipping upgrade.
2. If you chose upgrade charge, enter the charge amount in the text box.
3. Select the type of shipping the upgrade applies to.

See also

Free - Flat Fee - $ or Percentage Off
Item Shipped Free or Flat Fee

Home > Site Manager by the Section > Experiences > Awards > Award Properties Tabs

Award Properties Tabs

Each Award item that is added to an experience has a number of properties associated with it. Those properties appear on tabbed panes at the bottom of the page. Information on each tabbed pane is included in this section.

Articles in this section

Timeframe Tab

Related Award Properties Tab

Rank Tab

Single Use Tab

See also

Item Level Awards
Order Level Awards
Shipping Awards

Timeframe Tab

Enter a start and/or end date for the award. If no start or end date is specified, the start date will be immediate and end date will be indefinite.

Start and end dates cannot precede or exceed those scheduled for the experience. Adjust the experience timeframe if you would like to schedule this timeframe for this award outside of the start and end date scheduled for the experience.

See also

Related Award Properties Tab
Rank Tab
Single Use Tab

Related Award Properties Tab

All awards of the same type (item, order, or shipping) originating from the same option in the body are listed. If there is more than one award, a radio button appears to set whether all awards should be applied or only the first one. Adjust the order of current and competing content as desired.

Check the checkbox to select to not apply any other awards in this or other experiences once any of the ones listed here have been applied.

See also

Timeframe Tab
Rank Tab
Single Use Tab

Rank Tab

The rank tab shows how experiences with this same award are ordered in relation to this experience. Higher ordered awards are awarded first if a user qualifies for more than one award. The award in the current experience will be displayed in the list with a different color for the font. The current award may be selected and moved up or down in the ordering. The other awards listed can only be selected and moved from within their own experience. To move one of those, open the experience it is in, select the award, and adjust its order in its Rank tab.

See also

Timeframe Tab
Related Award Properties Tab
Single Use Tab

Home > Site Manager by the Section > Experiences > Awards > Award Properties Tabs > Single Use Tab

Single Use Tab

The Single Use tab indicates whether this award can be used more than once by a user. Select the checkbox to limit it to one time use, deselect it to allow a user to use it multiple times. If set for one time use, a user will not be allowed to use the award more than once. Information indicating that the award has been used will be recorded with each user that uses the award, which prevents the user from being eligible to use the award again.

See also

Timeframe Tab
Related Award Properties Tab
Rank Tab

Home > Site Manager by the Section > Experiences > Email Templates

Email Templates

Various email templates are provided as a starting point for you to edit. To edit the templates, enter different text and tokens for HTML and text versions of each email. Tokens are tags that indicate dynamically populated content such as the user's name or contents of their Shopping Cart.

Email Templates in the body of an experience have three options for connection points: email sent, email opened (only works for HTML emails), and email clicked (the user clicked a link in the email back to the Web site).

To add an email template to an experience:

1. Select an existing template and drag it into the experience.
2. Modify the "Email Information", "HTML Body Contents", "Text Body Contents", and "Recurrence Pattern" tabs as desired.
3. Select "Save" to save your changes.

To preview an email template in an experience:

1. Select the email template in the experience that you wish to preview.
2. Select the "Preview" tab in the properties pane to see a preview of the email. A window will pop up with a preview of the email.
3. Select "HTML Version" or "Text Version" to see the HTML and text versions of the email.

To change the working status of an email template in an experience:

1. Select the email template in the experience that you wish to change.
2. Select the drop-down box near the top of the properties pane. Change the status to the appropriate status. Note that setting the status to "Approved" will also activate the email template.

To activate an email template in an experience:

1. Follow the steps above to change the working status to "Approved", or select the "Activate" button.

To deactivate an email template in an experience:

1. Follow the steps above to change the working status to "Declined", or select the "Deactivate" button.

Articles in this section

Email Templates Properties Tabs

See also

All Experiences
User Groups
Targeted Content
Awards

Home > Site Manager by the Section > Experiences > Email Templates > Email Templates Properties Tabs

Email Templates Properties Tabs

Each Email Template item that is added to an experience has a number of properties associated with it. Those properties appear on tabbed panes at the bottom of the page. Information on each tabbed pane is included in this section.

Articles in this section

Email Information Properties Tab

The email name (for internal reference) and subject line are included by default based on the name of the email template. Change these as desired and enter a from email address.

The from email address and subject line will appear in the email.

See also

HTML Body Contents Properties Tab
Text Body Contents Properties Tab
Recurrence Pattern Properties Tab

HTML Body Contents Properties Tab

Adjust the HTML for the HTML version of the email. Click the 'Preview' button above to see what the HTML will look like to the recipient.

Insert tokens in the email to personalize it for the recipient. A few are listed below for reference. A full list and instructions for insertion can be found here.

- $!{first_name} = user's first name
- ${home_page_link} = link to Web site home page
- ${item.name} = name of an item in the user's Shopping Cart
- ${item.image_src} = image of item in user's Shopping Cart
- ${item.price.currency} = price of item in user's Shopping Cart
- $(wish_list_link) = link to Wish List

See also

Email Information Properties Tab
Text Body Contents Properties Tab
Recurrence Pattern Properties Tab

Text Body Contents Properties Tab

Adjust the HTML for the text version of the email. Click the 'Preview' button above to see what the HTML will look like to the recipient.

Insert tokens in the email to personalize it for the recipient. A few are listed below for reference. A full list and instructions for insertion can be found here.

- $!{first_name} = user's first name
- ${home_page_link} = link to Web site home page
- ${item.name} = name of an item in the user's Shopping Cart
- ${item.image_src} = image of item in user's Shopping Cart
- ${item.price.currency} = price of item in user's Shopping Cart
- $(wish_list_link) = link to Wish List

See also

Email Information Properties Tab
HTML Body Contents Properties Tab
Recurrence Pattern Properties Tab

Recurrence Pattern Properties Tab

Enter a start on date and end on date. End on date is optional.

Optionally select a recurrence pattern of every specified number of days or hours or daily, weekly, or monthly. Also select days of the week to exclude. All days cannot be excluded.

Selecting daily, weekly, monthly will follow the start on date. Daily is 24 hours based on start on time, weekly is every 7 days, and monthly every 30 days. Monthly means that the schedule will be repeated on the same day as the start on date every month (e.g. March 5 is selected as a start on date so the reoccurrence process will run on the 5th of every month). If the start on date for monthly is not present in a given month (e.g. 31st) the process will not run for those months with fewer than 31 days.

Select to send this email to users multiple times with each recurrence. By default all users will only receive this email once.

See also

Email Information Properties Tab
HTML Body Contents Properties Tab
Text Body Contents Properties Tab

Home > Site Manager by the Section > Search

Search

The Search section of the Site Manager allows you to manage the operations involved with the search engine for the web site. You can build a new search index, manage synonyms, and manage page redirects.

Articles in this section

Build Index Thesaurus Redirects XML Sitemap

See also

Product Catalog
Content
Experiences
Customer Service
Reporting
Users and Roles
System Tools

Home > Site Manager by the Section > Search > Build Index

Build Index

Use this page to create new search indexes and swap them into use. Search indexes are built separately from the active index. To generate and use a new index, you need to build it and then swap it into place.

To create a new search index:

1. Select the "Build Index" checkbox.
2. Select "Go".

To swap a newly created index into use:

1. Select the "Switch Index" checkbox.
2. Select "Go". The new index will be swapped for the active one and will become the one that is used for searches.

See also

Thesaurus
Redirects
XML Sitemap

Home > Site Manager by the Section > Search > Thesaurus

Thesaurus

Use this page to find existing thesaurus entries or to create new entries.

To find an existing entry:

1. Select the "Find An Entry" tab.
2. Enter the term you are searching for in the entry box.
3. Select "Find".

To see all the entries presently in the Thesaurus:

1. Select the "Find An Entry" tab.
2. Select "View All Entries".

To enter a new term:

1. Select the "Create An Entry" tab.
2. Decide on a one-way or two-way entry and select the appropriate radio button. See the note below for more information on the different types of entries.
3. For a one-way entry, enter the main term name. You may follow the main term with the list of synonyms for that term, separated by commas, or you may enter the synonyms on the next screen. For a two-way entry, enter any of the term names. You may follow the term name with the list of synonyms for it, separated by commas, or you may enter the synonyms on the next screen.
4. Select "Create Entry".
5. On the next page you will be able to add more synonyms for your new term. Enter one or more synonyms, separated by commas, then select "Add Term".
6. To return to the main Thesaurus page, select "Return to Thesaurus".

To edit an entry:

1. Find the entry you wish to edit.
2. Select the "Edit" icon.
3. To add additional synonyms for the term, enter the term or a comma separated list of terms and select "Add Term".
4. To delete the term, select the "Delete" icon.
5. To return to the main Thesaurus page, select "Return to Thesaurus".

To delete an entry:

1. Find the entry you wish to delete
2. Select the "Delete" icon.
3. Select "Yes" in the confirmation dialog box that comes up.

Note: Additional information on how one-way and two-way search terms function.

One-Way: (iPod -> MP3, Music)

- If a user searches on 'MP3' all products that contain the word 'iPod' will also be returned along with 'MP3' products.
- If a user searches on 'iPod' only products labeled as 'iPod' will be returned, but not any 'MP3' or 'Music' products.

Two-Way: (Cyan <-> Blue)

- All searches for 'Cyan' or 'Blue' return the same results since these two terms are two-way synonyms.

Articles in this section

Find an Entry

Create an Entry

See also

Build Index
Redirects
XML Sitemap

Find an Entry

The Find an Entry tab allows you to find an entry in the thesaurus, or view all the thesaurus entries. For general information on working with the thesaurus, see the Thesaurus page.

Text Box: Enter the word you are searching for in the thesaurus.

Find: Select this button to search the thesaurus for the word in the text box. The search results will appear beneath the Find an Entry tab.

View All Entries: Select this button to view all the entries in the thesaurus. The entries will appear beneath the Find an Entry tab.

See also

Create an Entry

Home > Site Manager by the Section > Search > Thesaurus > Create an Entry

Create an Entry

The Create an Entry tab allows you to add a new entry to the thesaurus. For general information on working with the thesaurus, see the Thesaurus page.

Text Box: For a one-way entry, enter the main term name. You may follow the main term with the list of synonyms for that term, separated by commas, or you may enter the synonyms on the next screen. For a two-way entry, enter any of the term names. You may follow the term name with the list of synonyms for it, separated by commas, or you may enter the synonyms on the next screen.

One-Way: Select this radio button to create a one-way thesaurus entry. A one-way entry is an entry where one term is a synonyms for others, but the others are not a synonym for the first. Additional information on one-way thesaurus entries is here.

Two-Way: Select this radio button to create a two-way thesaurus entry. A two-way entry is an entry where all terms are synonyms for each other. Additional information on two-way search terms is here.

Create Entry: Select this button to create the new thesaurus entry. The entry will be created and the page will redraw. You will be able to add additional terms to your entry. Additional information on creating thesaurus entries is here.

See also

Find an Entry

Home > Site Manager by the Section > Search > Redirects

Redirects

Use this page to create and edit search redirects.

Redirect Information: Use the fields in this box to create or edit a search redirect.

- **Search Terms**: Enter the search terms for the search redirect in this field. If multiple search terms will apply to the redirect, separate the search terms with commas.
- **URL**: Enter the redirect URL in this field.
  - **Context-Relative**: Select/deselect this checkbox to indicate whether or not the URL is context-relative or is a full path.
  - **Always-Redirect**: Select/deselect this checkbox to indicate whether or not the site visitor should always be redirected to the URL when they search with the specified search terms. If selected, the site visitor will be redirected regardless any other information that matches the search term(s).
- **Display Name**: Enter a display name for the redirect in this field. The display name will be displayed as the link to the URL when the results of the search are shown.
- **Description**: Enter a description for the redirect in this field. The description may be displayed along with the display name in the search results.
- **OK**: Select this button to save the information entered in the fields.
- **Cancel**: Select this button to cancel creating a new redirect or editing an existing redirect. No information will saved.

Search Redirect List: This list contains the list of all of the defined search redirects.

- **Search Terms**: This column contains the search term(s) for the redirect.
- **URL**: This column contains the URL for the redirect.
- **Context-Relative**: This column indicates whether or not the redirect URL is context-relative.
- **Always Redirect**: This column indicates whether or not the site visitor will always be redirect to the redirect URL when they perform a search using the search terms.
- **Edit**: Select this icon to edit the search redirect. The "Redirect Information" box will be populated with the values of the search redirect. Modify the fields as necessary, then select the "OK" button to save your changes.
- **Delete**: Select this icon to delete the search redirect.

See also

Build Index
Thesaurus
XML Sitemap

Home > Site Manager by the Section > Search > XML Sitemap

XML Sitemap

Use this page to begin the execution of the sitemap generation process.

Generate XML Sitemap: Select this button to being the process of creating a new sitemap for the site.

Sitemap building activity: This table contains the status of and statistics for previous executions of the sitemap generation process.

See also

Build Index
Thesaurus
Redirects

Customer Service

The Customer Service section of the Site Manager allows you to manage the customers, orders, and vendors for the web site.

Articles in this section

Customers
Search Orders
Stores
Mobile App Notifications
Shipping Carriers
Promotions
Gift Card/Certificate Balance
Business Partner Accounts

See also

Product Catalog
Content
Experiences
Search
Reporting
Users and Roles
System Tools

Home > Site Manager by the Section > Customer Service > Customers

Customers

In the Customers portion of Customer Service you can manage details associated with the customers of your site.

Articles in this section

Customers

Email Signup

Registration Requests

See also

Search Orders
Stores
Mobile App Notifications
Shipping Carriers
Promotions
Gift Card/Certificate Balance
Business Partner Accounts

Customers

Use this page to manage the customers of the site.

If you are working with a multiple-site configuration, use the "Change Site" drop-down list box at the top of the screen to select the site you are working with. Only the customers for the selected site will be available. If you are working with a single-site configuration, the "Change Site" drop-down list box is not available and no site selection is required.

If you are working with an international site, use the "Select Locale" drop-down list box at the top of the screen to select the locale you are working with. Only the customers for the selected locale will be available. If your site is not an international site, the "Select Locale" drop-down list box will not be available.

To create a new customer:

1. Select the "Create a Customer" tab.
2. Enter the first name of the customer in the "First Name" text box.
3. Enter the last name of the customer in the "Last Name" text box.
4. Enter the email address of the customer in the "Email Address" text box.
5. Select "Create Customer". The page will refresh.
6. Fill in the information for the customer on the "Profile" tab. Select "Update Profile" to save your changes.
7. If the customer is associated with a B2B site and you wish to assign them to one or more business partner accounts, select the "Business Partner Account" tab. Select "Choose BPA", then search for and select the business partner account(s) the customer should be associated with.
8. To add addresses for the customer, select the "Address Book" tab. Enter information for each address and select "Add" to save it.
9. Select "Back to Find a Customer" to return to the previous page.

To find a customer:

1. In the "Find a Customer" tab box, enter your search criteria for the customer in the various text boxes.
2. Select "Find". The page will refresh and a list of all customers matching your search criteria will be displayed.

To edit a customer's profile:

1. Follow the instructions to find a customer.
2. Select the "Edit Profile" icon to the right of the customer's name. A new page will display with tabs for "Profile", "Business Partner Accounts" (if the customer is associated with a B2B site), "Orders", and "Address Book".
3. Select the "Profile" tab.
4. Make your changes to the profile.
5. Select "Update Profile" to save your changes.
6. Select "Back to Find a Customer" to return to the previous page.

To edit or view a customer's address book:

1. Follow the instructions to find a customer.
2. Select the "Edit Profile" icon to the right of the customer's name. A new page will display with tabs for "Profile", "Business Partner Accounts" (if the customer is associated with a B2B site), "Orders", and "Address Book".
3. Select the "Address Book" tab. You will see a list of all of the customer's addresses.
4. Create a new address by entering information in the fields and selecting "Add".
5. Edit an existing address by selecting the "Edit" icon to the right of it. Make your changes and select "Update" to save them.
6. Select "Back to Find a Customer" to return to the previous page.

To assign a customer associated with a B2B site to a business partner account:

1. Follow the instructions to find a customer.
2. Select the "Edit Profile" icon to the right of the customer's name. A new page will display with tabs for "Profile", "Business Partner Accounts", "Orders", and "Address Book".
3. Select the "Business Partner Accounts" tab. You will see a list of all of the business partner accounts the customer is currently associated with.
4. Select "Choose BPA". A pop-up dialog box will appear.
5. In the dialog box, search for the business partner account(s) the customer should be associated with.
6. Select the "Select" icon to the right of each account the customer will be associated with.
7. Dismiss the dialog box. The new accounts will appear in the list on the "Business Partner Accounts" tab.

Articles in this section

Find a Customer

Create a Customer

Profile

Business Partner Accounts

Orders

Address Book

Rewards

See also

Email Signup
Registration Requests

Home > Site Manager by the Section > Customer Service > Customers > Customers > Find a Customer

Find a Customer

The Find a Customer tab allows you to find a customer. You may search for a customer on any combination of specifics, based on which of the entry fields you fill in. The entry fields available will vary depending on whether you are search for customers associated with a B2C site or customers associated with a B2B site. For general information on working with customers, see the Customers page.

First Name: Enter the first name you are searching for in this text field.

Last Name: Enter the last name you are searching for in this text field.

Email Address: Enter the email address you are searching for in this text field.

Phone Number: Enter the phone number you are searching for in this text field. This field is available only when searching for customers associated with a B2C site.

Rewards Number: Enter the rewards number you are searching for in this text field. This field is available only when searching for customers associated with a B2C site.

Billing Information: Select this option if you wish to search for a customer based on their billing address.

Shipping Information: Select this option if you wish to search for a customer based on their shipping address.

Address 1: Enter the first line of the customer's street address.

Address 2: Enter the second line of the customer's street address.

Apartment: Enter the apartment number of the customer's street address.

City: Enter the city of the customer's street address.

State/Province: Enter the state/province of the customer's street address.

Zip/Postal Code: Enter the zip/postal code you are searching for in this text field. This field is available only when searching for customers associated with a B2C site.

Company: Enter the name of the company the customer works for in this text field. This field is available only when searching for customers associated with a B2B site.

Business Partner Account ID: Enter the ID of the business partner account the customer is associated with in this text field. This field is available only when searching for customers associated with a B2B site.

Business Partner Account Name: Enter the name of the businnes partner account the customer is associated with in this text field. This field is available only when searching for customers associated with a B2B site.

Find: Select this button to search for customers that match the search criteria you entered. Search results will be displayed below the Find a Customer tab.

See also

Create a Customer
Profile
Business Partner Accounts
Orders
Address Book
Rewards

Home > Site Manager by the Section > Customer Service > Customers > Customers > Create a Customer

Create a Customer

The Create a Customer tab allows you to create a new customer. For general information on working with customers, see the Customers page.

First Name: Enter the first name of the new customer.

Last Name: Enter the last name of the new customer.

Email Address: Enter the email address of the new customer.

Create Customer: Select this button to create the new customer. The page will redraw and tabs for "Profile", "Business Partner Accounts" (if the customer is associated with a B2B site), "Orders", and "Address Book" will appear. Enter the appropriate information in each of the tabs.

See also

Find a Customer
Profile
Business Partner Accounts
Orders
Address Book
Rewards

Profile

The Profile tab allows you to manage the contact information for the current customer.

Country: This text entry field contains the country of the customer and is available only on international sites. This is a required field when present.

First Name: This text entry field contains the first name of the customer. This is a required field.

Last Name: This text entry field contains the last name of the customer. This is a required field.

Company Name: This text entry field contains the name of the company the customer is employed by.

Address 1: This text entry field contains the first address line for the customer. This is a required field.

Address 2: This text entry field contains the second address line for the customer.

Apartment: This text entry field contains the apartment number of the customer.

City: This text entry field contains the city customer lives in. This is a required field.

State/Province: This drop-down list box contains the state or province the customer lives in. This is a required field.

Zip/Postal Code: This text entry field contains the zip or postal code of the customer's address. This is a required field.

Phone Number: This text entry field contains the primary phone number for the customer. This is a required field.

Additional Phone Number: This text entry field contains the secondary phone number for the customer.

Birth Month: This drop-down list box contains the months of the year. Select the customer's month of birth. This is an optional field.

Birth Date: This drop-down list box contains the dates in the selected birth month. Select the date the customer was born on. This is an optional field.

Email Address: This text entry field contains the email address for the customer. This is a required field.

Password: This text entry field contains the password for the customer's account. This is a required field.

Verify Password: This text entry field contains a duplicate of the password for the customer's account. This contents of this field must match the contents of the "Password" field.

Email Preference: These radio buttons indicate whether or not the customer has signed up to receive emails from the website. Select "Subscribed" if the customer wishes to receive emails, and "Not Subscribed" if the customer does not.

Email Format: The radio buttons indicate the format that emails sent to them should be in. Select "HTML" if they prefer HTML emails, and "Text" if they prefer text.

Mobile Alerts: The radio buttons indicate whether or not the customer has agreed to receive alerts on their mobile phone. If they have agreed to receive alerts, their mobile phone number will be entered in the box underneath the radio buttons.

Update Profile: This button saves the modifications on this page when selected. No modifications will be saved until this button is selected.

See also

Find a Customer
Create a Customer
Business Partner Accounts
Orders
Address Book
Rewards

Home > Site Manager by the Section > Customer Service > Customers > Customers > Business Partner Accounts

Business Partner Accounts

The Business Partner Accounts tab allows you to manage the business partner accounts the customer is associated with. This tab is only available when working with a customer associated with a B2B account.

Choose BPA: Select this button to add a business partner account association to the user. A pop-up dialog box will appear. Use the dialog box to search for the appropriate business partner account, then select the "Select" box to the right of the account to add it to this customer. Dismiss the dialog when complete.

Business Partner List: The list of all of the business partner accounts this customer is associated with. Select the "Remove" icon to the right of an account to remove the association between the customer and that account.

See also

Find a Customer
Create a Customer
Profile
Orders
Address Book
Rewards

Orders

This tab allows you to review the orders placed by the current customer.

Order List: This is the list of orders the user has placed. Selecting the "Order #" for any order will open a new tab that contains the order.

See also

Find a Customer
Create a Customer
Profile
Business Partner Accounts
Address Book
Rewards

Home > Site Manager by the Section > Customer Service > Customers > Customers > Address Book

Address Book

The Address Book tab allows you to manage the address book for the current customer. These addresses would be in addition to the primary address associated with the customer, which is maintained on the Profile tab.

Country: This text entry field is available only on international site. It contains the country of the addressee. This is a required field when present.

First Name: This text entry field contains the first name of the addressee. This is a required field.

Last Name: This text entry field contains the last name of the addressee. This is a required field.

Company Name: This text entry field contains the name of the company the addressee is employed by.

Address 1: This text entry field contains the first address line for the addressee. This is a required field.

Address 2: This text entry field contains the second address line for the addressee.

Apartment: This text entry field contains the apartment number for the addressee.

City: This text entry field contains the city the addressee lives in. This is a required field.

State/Province: This drop-down list box contains the state or province the addressee lives in. This is a required field.

Zip/Postal Code: This text entry field contains the zip or postal code of the addressee. This is a required field.

Phone Number: This text entry field contains the primary phone number for the addressee. This is a required field.

Additional Phone Number: This text entry field contains the secondary phone number for the addressee.

Add: Selecting this button creates a new address book entry for the current customer.

Cancel: Selecting this button clears any text entered in the text fields. No address book entry is created.

Address List: This list box contains the list of the address book entries that have been created for the current customer. Select the "Edit" icon to make changes to any entry. Select the "Delete" icon to remove an entry.

See also

Find a Customer
Create a Customer
Profile
Business Partner Accounts
Orders
Rewards

Home > Site Manager by the Section > Customer Service > Customers > Customers > Rewards

Rewards

The Rewards tab allows you to sign a customer up for the rewards program and view information on their rewards account. This tab is not available if the website is not integrated with the Relate Loyalty application.

Sign Up: This button is available only if the customer is not a member of the rewards program. Select this button to enroll the customer in the program.

Points: This summary box appears only if the customer is entrolled in the rewards program. It contains information on the customer's loyalty/rewards account.

- **Loyalty Card Number**: The number of the customer's loyalty account.
- **Level**: The reward level the customer has attained.
- **Current Points**: The number of points currently available in the customer's account.
- **Points Earned This Year**: The total number of points earned in the year.
- **Total Points Earned**: The lifetime total of points the customer has earned.

Rewards Found: This list only appears if the customer is enrolled in the rewards program. This list contains all of the rewards that the customer has earned.

- **Certificate Number**: The number of the reward certificate.
- **Reward Balance**: The amount not yet redeemed on the reward certificate.
- **Expiration Date**: The date the reward certificate expires.

See also

Find a Customer
Create a Customer
Profile
Business Partner Accounts
Orders
Address Book

Home > Site Manager by the Section > Customer Service > Customers > Email Signup

Email Signup

Use this page to manage the users who have signed up to receive email from the site.

If you are working with a multiple-site configuration, use the "Change Site" drop-down list box at the top of the screen to select the site you are working with. Only the users for the selected site will be available. If you are working with a single-site configuration, the "Change Site" drop-down list box is not available and no site selection is required.

If you are working with an international site, use the "Select Locale" drop-down list box at the top of the screen to select the locale you are working with. Only the users for the selected locale will be available. If your site is not an international site, the "Select Locale" drop-down list box will not be available.

To find a user:

1. Enter the user's email address in the "Email Address:" text box.
2. Select "Find". The page refreshes and contains a list of all matching email addresses that were found.

To find all users:

1. Select "View All Emails." The page refreshes and contains a list of all email addresses in the site.

To change a user's email preference:

1. Follow the instructions to find a user.
2. Check the "Preference" checkbox to have the user receive emails from the site. Uncheck the "Preference" checkbox to prevent the user from receiving emails from the site.

To change a user's email format:

1. Follow the instructions to find a user.
2. In the "Format" drop down list, choose the email format the user will receive.

See also

Customers
Registration Requests

Home > Site Manager by the Section > Customer Service > Customers > Registration Requests

Registration Requests

Use this page to manage the requests that have been created to create new accounts on the site. This page is only available when working with a B2B site.

If you are working with a multiple-site configuration, use the "Change Site" drop-down list box at the top of the screen to select the site you are working with. Only the registration requests for the selected site will be available. If you are working with a single-site configuration, the "Change Site" drop-down list box is not available and no site selection is required.

If you are working with an international site, use the "Select Locale" drop-down list box at the top of the screen to select the locale you are working with. Only the registration requests for the selected locale will be available. If your site is not an international site, the "Select Locale" drop-down list box will not be available.

To view the details of a registration request:

1. In the list of registration requests, select the "View" icon to the right of the registration you wish to review the details for. The page will redraw and you will see the details associated with the request.

To remove a registration request:

1. In the list of registration requests, select the "Remove" icon to the right of the registration you with to remove. The registration will be removed from the list.

To create a customer from a registration request (closed registration sites only):

1. In the list of registration requests, select the "View" icon to the right of the registration you wish to review the details for. The page will redraw and you will see the details associated with the request.
2. Select "Create Customer". The customer will be created, and the "Profile" tab of the customer will appear.
3. Make any necessary modifications on the "Profile" tab. Select "Update Profile" to save the modifications. See the "Customers" page for additional information on customers.

See also

Customers
Email Signup

Home > Site Manager by the Section > Customer Service > Search Orders

Search Orders

Use this page to search for orders that have already been placed. This page is available only when working with a B2C site, and only users with the "order.view" privilege will be able to use this page.

If you are working with a multiple-site configuration, use the "Change Site" drop-down list box at the top of the screen to select the site you are working with. Only the orders for the selected site will be available. If you are working with a single-site configuration, the "Change Site" drop-down list box is not available and no site selection is required.

If you are working with an international site, use the "Select Locale" drop-down list box at the top of the screen to select the locale you are working with. Only the orders for the selected locale will be available. If your site is not an international site, the "Select Locale" drop-down list box will not be available.

To find an order:

1. Enter your search criteria in the "Search Order" tab. See Search Criteria for more information on the available search criteria options.
2. Select "Find". The page refreshes with a list of orders that match the search criteria.
3. Select the order number of the order you want to view. The order will appear in a new tab.

Articles in this section

Search Criteria and Results

Review Order

See also

Customers
Stores
Mobile App Notifications
Shipping Carriers
Promotions
Gift Card/Certificate Balance
Business Partner Accounts

Home > Site Manager by the Section > Customer Service > Search Orders > Search Criteria and Results

Search Criteria and Results

The search criteria for searching orders provides multiple ways to find orders. Any combination of search criteria can be entered, but at least one item needs to be entered prior to searching. Search results appear at the bottom of the screen.

- **Start Date**: Enter the beginning date for the time period you are searching in. You can also use the calendar icon to select the date.
- **End Date**: Enter the end date for the time period you are searching in. You can also use the calendar icon to select the date.
- **Order Number**: Enter the order number of the order you are searching for.
- Order Placed In: Select the locale of the order you are searching for. This field is used on international sites.
- **Rewards ID Number**: Enter the loyalty rewards number of the customer whose orders you are searching for. This field is available only when the site is using the Relate loyalty awards functionality.
- **Email Address**: Enter the email address of the customer whose orders you are searching for.
- **Billing Information**: This section contains search criteria related to the billing address of the customer.
  - **First Name**: Enter the first name of the customer whose orders you are searching for.
  - **Last Name**: Enter the last name of the customer whose orders you are searching for.
  - **Address 1**: Enter the first address line of the customer whose orders you are searching for. This should correspond to either the shipping or billing address, depending on the button selected above.
  - **Address 2**: Enter the second address line of the customer whose orders you are searching for. This should correspond to either the shipping or billing address, depending on the button selected above.
  - **Apartment**: Enter the apartment number, if applicable, of the customer whose orders you are searching for. This should correspond to either the shipping or billing address, depending on the button selected above.
  - **City**: Enter the city of the customer whose orders you are searching for. This should correspond to either the shipping or billing address, depending on the button selected above.
  - **State/Province**: Enter the state/province of the customer whose orders you are searching for. This should correspond to either the shipping or billing address, depending on the button selected above.
  - **Zip/Postal Code**: Enter the zip/postal code of the customer whose orders you are searching for. This should correspond to either the shipping or billing address, depending on the button selected above.
- **Find**: Select this to search for orders that match the criteria entered above. If the total number of orders that match the criteria is greater than the number that can be displayed, a message will be displayed at the top of the page. You will need to add additional search criteria in order to narrow your search results.

<#> Results Found: This table contains the orders that were found that match the search criteria.

- **Billing Name**: The name the order was billed to.
- **Order UUID**: The Universally Unique IDentifier for the order.
- **Order #**: The site order number for the order. Selecting the order number will open the order.
- **Order Date**: The date the order was placed.
- **Order Total**: The total amount of the order.

See also

Review Order

Home > Site Manager by the Section > Customer Service > Search Orders > Review Order

Review Order

This page allows you to view the information available for the order. The information that is displayed varies based on the status of the order, so the fields described below may not be visible with every order. This page is only available for users that have the "order.view" privilege.

Header area: The header area shows various pieces of information about the order, including the date it was placed, its status, and the total of the order.

- **Order #**: The order number that is being reviewed.
- **Xstore Order #**: If the order was generated in the Xstore system, the Xstore order number will be displayed. This field will not be available if the order was not generated in Xstore.
- **Locate Order #**: If the order was generated in the Locate system, the Locate order number will be displayed. This field will not be available if the order does not have a Locate order number.
- **Date**: The date the order was created.
- **Channel**: The source of the order is displayed in this field. If the order was placed on the web, the channel will be displayed as "Online". If the order was placed by the order management system, the channel "Call Center" will be displayed. If the order was place in a store, the channel "Store" will be displayed, along with the store's number, name, and phone number.
- **Total Merchandise**: This field displays the current merchandise total for the order.
- **Tax**: This field contains the amount of tax on the order.
- **Estimated Shipping**: This field contains the shipping costs.
- **Discount**: This field contains the monetary amount of any discounts applied to the order.
- **Gift Card/Certificate Total**: This field contains the monetary amount of any gift cards and/or gift certificates used to pay for the order. This field appears only if gift cards and/or gift certificates were used in payment of the order.
- **Rewards**: This field contains the monetary amount of any rewards used in payment of the order. This field appears only if rewards were used in payment of the order.
- **Grand Total**: This field contains the grand total of the order.

Order Summary: This area lists the items that were purchased in the order.

- **Style #**: This column lists the internal style number of the item.
- **Name**: This column lists the name of the item.
- **Price**: This column lists the price of the item.
- **Quantity**: This column lists how many of the items were purchased.
- **Discount**: This column contains the amount of any discount applied to the item.
- **Total**: This column is the total amount charged for the item, which is price times the number of items purchased, minus any discounts applied.
- **Detail**: Selecting the icon in this column will display a new window, which will contain a summary of the item purchased.
- **Gift Wrap**: This column indicates whether or not gift wrapping was purchased for the item.

Promotion Code, Coupon Code, or Source Code: This section lists any promotions, coupons, or source codes used with the order.

Billing & Shipping: This section lists the billing and shipping addresses for the order. Any gift messages included in the order will also be listed.

Payment Information: This section summarizes the payment information used for the order, including any gift certificates or rewards redeemed.

See also

Search Criteria and Results

Home > Site Manager by the Section > Customer Service > Stores

Stores

Use this page to manage the stores defined for the site. This page is available only when working with a B2C site.

If you are working with a multiple-site configuration, use the "Change Site" drop-down list box at the top of the screen to select the site you are working with. Only stores for the selected site will be available. If you are working with a single-site configuration, the "Change Site" drop-down list box is not available and no site selection is required.

If you are working with an international site, use the "Select Locale" drop-down list box at the top of the screen to select the locale you are working with. Only stores for the selected locale will be available. If your site is not an international site, the "Select Locale" drop-down list box will not be available.

To find a store:

1. Select the "Find a Store" tab.
2. Select the search method you wish to use in the "Search By" drop-down field.
3. Enter the search criteria in the "Search Term" field.
4. Select the "Find" button. The page will refresh and the stores matching the search options will appear in the list at the bottom of the page.

To create a store:

1. Select the "Create a Store" tab.
2. Enter the name of the store in the "Store Name:" text box.
3. Select "Create Store".
4. Enter the details for the store in "Store Information" tab that appears.
    - Enter the latitude and longitude for the store, or select "Calculate Latitude & Longitude".
    - Select "Update Store".
5. To enter events for the store, select the "Events" tab.
    - Enter a title and description for each event.
    - Select "Ok" to save each event.

To edit a store:

1. Locate the store you want to edit.
2. Select the edit icon for the store.
3. If you are changing store details, select the "Store Information" tab and make your changes. Select "Update Store" to save your changes.
4. If you are modifying events for the store, select the "Events" tab.
    - If you are changing an existing event, select the "Edit" icon for the event, make your changes and select "Ok" to save them.
    - If you are adding a new event, enter your event information and select "Ok" to save it.

Articles in this section

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Home > Site Manager by the Section > Customer Service > Stores > Find a Store

Find a Store

The Find a Store tab allows you to search for a particular store or stores. This page is only available on B2C sites.

Search By: Use this drop-down list to select the type of search to be performed.

Search Term: Enter the information being searched for.

Find: Select the find button to search for the stores that match the search criteria that has been entered.

Store list: The store list contains all the stores that match the search criteria.

- **Store Name**: This column contains the name of the store.
- **Store Number**: This column contains the internal number of the store.
- **Address**: This column contains the street address of the store.
- **City**: This column contains the city the store is located in.
- **State/Province**: This columns contains the state or province the store is located in.
- **Zip/Postal Code**: This column contains the zip or postal code of the store.
- **Country**: This column contains the country the store is located in.
- **Phone**: This column contains the phone number of the store.
- **Active**: Select this column to activate or deactivate the store. Inactive stores will not be available for use on the website.
- **Edit**: Select this column to edit the store.
- **Delete**: Select this column to delete the store.

See also

Create Store
Store Information
Images
Events
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SEO

Home > Site Manager by the Section > Customer Service > Stores > Create Store

Create Store

The Create a Store tab is used to create a new store. This page is only available on B2C sites.

Store Name: This field contains the name of the new store.

Create Store: Select this button to create the new store.

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Store Information
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SEO

Home > Site Manager by the Section > Customer Service > Stores > Store Information

Store Information

The Store Information tab allows you to manage the location and hours for the current store. This tab is available only when working with a B2C site.

Active: This checkbox indicates whether or not the store is active. Inactive stores will not be available on the store list on the website. Select this checkbox to make the store active, deselect it to deactivate the store.

Allow Store Pick Up: Select this checkbox to enable in-store pickups at this store.

Store Address: This summary box contains the address of the store.

- **Country**: This drop-down list box contains the country the store is located in. This is a required field.
- **Store Name**: This text entry field contains the name for the store. This is the name the store will be referred to within the Site Manager and on the website. This is a required field.
- **Store Number**: This text entry field contains the store number.
- **Address 1**: This text entry field contains the first address line for the store. This is required field.
- **Address 2**: This text entry field contains the second address line for the store.
- **City**: This text entry field contains the city the store is located in. This is required field.
- **State/Province**: This drop-down list box contains the state the store is located in. This is required field.
- **Zip/Postal Code**: This text entry field contains the zip code for the store. This is required field.
- **Phone**: This text entry field contains the phone number of the store. This is required field.
- **Latitude**: This text entry field contains the latitude of the store. The latitude can be entered manually, or the "Calculate Latitude & Longitude" button can be selected and the latititude will be calculated based on the street address of the store.
- **Longitude**: This text entry field contains the longitude of the store. The longitude can be entered manually, or the "Calculate Latitude & Longitude" button can be selected and the longititude will be calculated based on the street address of the store.
- **Calculate Latitude & Longitude**: Select this button to have the latitude and longitude of the store calculated from the street address of the store. The "Latitude" and "Longitude" text entry fields will be populated with the calculated result.

Regular Store Hours: This summary box contains the regular hours for the store.

- **Store Hours Display**: Enter the text that should appear for the hours of the store on the store's detail page on the web site.

Special Store Hours: This summary box contains special store hours information.

- **Special Store Hours Advanced Notification**: This summary box contains a notification that will be displayed on the store's detail page about special hours for the store.
  - **Clear Notification**: Select this button to clear any information in the "Notification Start Date", "Notification End Date", or "Notification Text" fields.
  - **Notification Start Date**: Enter the start date for when the notification should appear, or use the calendar icon to select the start date.
  - **Notification End Date**: Enter the end date for when the notification should stop appearing, or use the calendar icon to select the end date.
  - **Notification Text**: Enter the notification text that should appear regarding the special hours.

- **Special Store Hours Display**: This summary box contains the special hours for the store that will appear on the store's detail page on the web site.
  - **Clear Special Hours**: Select this button to clear any information in the "Display Start Date", "Display End Date", or "Special Store Hours Display" fields.
  - **Display Start Date**: Enter the start date for when the special hours should appear, or use the calendar icon to select the start date.
  - **Display End Date**: Enter the end date for when the special hours should stop appearing, or use the calendar icon to select the end date.
  - **Special Store Hours Display**: Enter the text that should display for the special store hours.

Update Store: This button saves the modifications made on this tab. No modifications are saved until this button is selected.

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Home > Site Manager by the Section > Customer Service > Stores > Images

Images

The Images tab allows you to manage the image(s) for the current store. These images will be displayed on the website on the store's detail page.

Add Image: This summary box allows you to add an image to the store.

- **Image File Name**: Enter the name of an image file in this field. The following characters are not permitted in image file names: \ ; / ? : @ & = + $, * " < > | ' { } % as well as spaces.
- **Look Up**: Select this button to search for the image. If the image is found, it will appear next to the Image File Name field.
- **Add Image**: Select this button to add an image to the product. The "Look Up" button must have been used to find an image prior to this button being selected.

Define Alternate Name: This summary box contains the information to define the alternate image name for the store. The alternate name is used by assistive screen readers and search engine spiders and should indicate what the image represents. Although a store may have multiple images, only one alternate image name is necessary per store.

- **ALT Name**: This text entry field contains the alternate image name for the product. Modify this as necessary.
- **Update**: Selecting this button will save any modifications to the alternate image name. No modifications will be saved until this button is selected.
- **Restore Original**: Selecting this link will restore the alternate image name to its default value, which is " at ". Select "Update" after selecting this link to save the default name as the alternate image name.

Current Store Images: This summary box contains all the images currently associated with the store. Select "Primary Image" under the image that should be the primary image for the store. Activate and deactivate images by selecting and deselecting the "Active" checkbox underneath each image. Inactive images will not appear on the website. Remove an image by selecting the "Delete" icon beneath it.

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Events

The Events tab allows you to manage the list of store events for the current store. This tab is available only when working with a B2C site. Store events may be displayed on the website in order to advertise these to customers.

Title: This text entry field contains the title of the event.

Description: This text editting field contains the description of the event. The description may be formatted as desired using the controls of the text editor.

Add: This buttons saves the event. The event will appear in the list of store events in the lower portion of the page.

Cancel: This buttons clears the contents of the "Title" and "Description" fields. No store event information will be saved.

Events List: This list box contains the list of events that have been defined for the store. Select or deselect the "Active" checkbox to activate or deactivate an event. Inactive events will not be displayed on the website. Select the "Edit" icon to edit an event. The page will refresh and the details of the selected event will be displayed. Select the "Delete" icon to remove a store event.

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Home > Site Manager by the Section > Customer Service > Stores > Mobile App Notifications

Mobile App Notifications

Use this page to create and manage the notifications that are defined for the store. Store notifications are sent to customer's mobile phone when the customer comes within a defined geographic distance of the store. The notification can contain text and coupon specials to encourage the customer to visit the store. All customers using the mobile application will receive notifications unless they have opted out on their phone.

Create a Mobile App Notification: Select this link to create a new notification for the store. The Mobile App Notifications tab will appear. Create the notification in that tab. Once it is created and linked to this store, it will appear at the bottom of this tab.

Notifications list: This list contains all of the notifications that are associated with the store. If there are no notifications associated with the store, the list will not appear.

- **Title**: The title of the notification.
- **In-App Notification**: The text that will be delivered to the mobile app with the notification.
- **Start Date**: The first date the notification will be available.
- **End Date**: The last date the notification will be available.
- **Stores**: This column will indicate how many stores the notification is associated with.
- **Sequence**: This column indicates the order in which the notification will be delivered to the mobile app in comparison to other notifications.
- **Active**: Select this icon to activate/deactivate the notification.
- **Edit**: Select this icon to edit the notification. The Mobile App Notification Detail page will appear.
- **Delete**: Select this icon to remove this notification's association with the store.

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SEO

Use the SEO tab to set Search Engine Optimization tags for the store's detail page on the site.

Exclude from XML Sitemap: Select this checkbox to exclude the store detail page from the sitemap that is generated for SEO.

Change Frequency: Select a value from this drop-down to indicate how frequently the store detail page is updated. This will be included in the generated sitemap for the site.

Priority: Select a value from this drop-down to indicate how important the store detail page is in comparison to other pages on the site. The higher the number chosen, the higher the importance of the store detail page. This will be included in the generated sitemap for the site.

Title: Enter the text that should be used as the title of the store's detail page in this field.

Meta Description: Enter the description that should be used for the store's detail page in this field.

Meta Keywords: Enter the keywords that should be used for the store's detail page in this field. If entering multiple keywords, separate them by commas. Meta keywords will appear in the source of the store's page.

Save: Select this button to save your changes.

See also

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Mobile App Notifications

Mobile App Notifications

Use this page to manage the mobile app notifications defined for the site. Notifications are sent to customer's mobile phone when the customer comes within a defined geographic distance of a store. The notification can contain text and coupon specials to encourage the customer to visit the store. All customers using the mobile application will receive notifications unless they have opted out on their phone.

This page is available only when the mobile app is being used with the site.

If you are working with a multiple-site configuration, use the "Change Site" drop-down list box at the top of the screen to select the site you are working with. Only notifications for the selected site will be available. If you are working with a single-site configuration, the "Change Site" drop-down list box is not available and no site selection is required.

If you are working with an international site, use the "Select Locale" drop-down list box at the top of the screen to select the locale you are working with. Only notifications for the selected locale will be available. If your site is not an international site, the "Select Locale" drop-down list box will not be available.

To create a mobile app notification:

1. Enter a title for the notification in the "Notification Title" text field.
2. Select "Create Notification".
3. Fill in the information in the Mobile App Notification Details screen.

To activate/deactivate a mobile app notification:

1. Locate in the Notifications list the notification you wish to activate/deactivate,
2. Select/deselect the "Active" checkbox to activate/deactivate the notification.

To edit a mobile app notification:

1. Locate in the Notifications list the notification you wish to edit.
2. Select the "Edit" icon for the notification.
3. In the Mobile App Notification Details page that appears, update the notification information as desired.
4. Select "Update" to save the modifications.

To remove a mobile app notification:

1. Locate in the Notifications list the notification you wish to edit.
2. Select the "Delete" icon for the notification.

Notifications list: The notification list contains the list of all of the currently defined notifications.

- **Title**: The title of the notification.
- **In-App Notification**: The notification text.
- **Start Date**: The start date of the notification. Notifications are not available for use prior to the start date.
- **End Date**: The end date of the notification. Notifications are not available for use after the end date has passed.
- **Stores**: The number of stores the notification is associated with.
- **Sequence**: The sequence is the order in which the notifications will be displayed on the mobile app.
- **Active**: If the checkbox is selected, the notification is active and available for use. If it is deselected, the notification is inactive and not available for use.
- **Edit**: Select this icon to edit the notification.
- **Delete**: Select this icon to delete the notification.

Articles in this section

Create a Mobile App Notification

Mobile App Notification Details

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Home > Site Manager by the Section > Customer Service > Mobile App Notifications > Create a Mobile App Notification

Create a Mobile App Notification

This area is used to create new mobile app notifications.

Notification Title: Enter the title for the new notification.
Create Notification: Select this button to create the notification. The Mobile App Notification Details page will appear. Enter additional details for the notification on that page.

See also

Mobile App Notification Details

Home > Site Manager by the Section > Customer Service > Mobile App Notifications > Mobile App Notification Details

Mobile App Notification Details

Mobile App Notification Details: This area on the screen contains the configuration options for the mobile app notification.

- **Active**: Select or deselect this checkbox to activate or deactivate the notification. An inactive notification is not available for use on the mobile app.
- **Start Date**: This field contains the first date the notification is active. The notification will be unavailable on dates prior to this one. If a start date is not set, the notification is immediately available. If a start date is not set, a start time should not be set.
- **Start Time**: This field contains the time on the start date at which point the notification will be active. The notification will be unavailable prior to this time. If a start time is not set but a start date is, the notification will be available at 12:00am on the start date. If neither a start date or a start time is set, the notification will be available immediately.
- **End Date**: This field contains the last date the notification will be active. After this date the notification will be unavailable for use on the mobile app. If an end date is not set, the notification will be available until it is manually deactivated or deleted. If an end date is not entered, an end time should not be entered.
- **End Time**: This field contains the last time on the last date that the notification will be active. After this time the notification will be unavailable for use on the mobile app. An end time should not be entered if an end date is not entered.
- **Send Passbook expiration push notification ___ days prior to coupon expiration**: Select this checkbox to send an expiration notice to the passbook prior to the coupon expiring. If the checkbox is checked, a number should also be entered for the number of days prior to the expiration that the notice should be sent.
- **Coupon Code Type**: Select the type of coupon that will be used with the notification.
- **Coupon Code**: Enter the coupon code for the notification.
- **In-App Notification**: This field contains the text that will be delivered with the notification.
- **Title**: This field contains the title of the notification. This is a required field.
- **Message**: This field contains the message that will be delivered with the notification.
- **More Information**: This field contains the information that will be available under the "More Information" link with the notification.
- **Terms and Conditions**: This field contains the information that will be available under the "Terms and Conditions" link with the notification.
- **Update**: Select this button to save any modifications.
- **Cancel**: Select this button to clear and modifications.

Associated Store: This area of the page is used to manage the stores associated with the notification.

- **Choose Stores**: Select this button to select a store(s) to associate with the notification. A pop-up window will appear. The notification can be associated with all stores, or you may search for specific stores.

Store List: This list contains the list of all of the stores the notification is associated with.

- **ID**: The internal identifier of the store.
- **Store Name**: The name of the store.
- **Store Number**: The number of the store.
- **Address**: The street address of the store.
- **Remove**: Select this icon to remove the store from the notification.

See also

Create a Mobile App Notification

Home > Site Manager by the Section > Customer Service > Shipping Carriers

Shipping Carriers

Use this page to manage shipping carriers and shipping fees.

If you are working with a multiple-site configuration, use the "Change Site" drop-down list box at the top of the screen to select the site you are working with. Only the shipping methods for the selected site will be available. If you are working with a single-site configuration, the "Change Site" drop-down list box is not available and no site selection is required.

If you are working with an international site, use the "Select Locale" drop-down list box at the top of the screen to select the locale you are working with. Only the shipping methods for the selected locale will be available. If your site is not an international site, the "Select Locale" drop-down list box will not be available.

To create a new shipping carrier:

1. Enter a code for the new shipping carrier in the "Shipping Carrier Code" text entry field.
2. Use the "Country" drop-down list box to select the country of the shipper.
3. Select "Create Shipping Carrier". The page will redraw and you will see two tabbed pages to enter additional information in.
4. On the "Shipping Carrier Information" tab:
    - Select the "Active" checkbox if the shipping carrier should be immediately available.
    - Enter the name of the shipping carrier in the "Shipping Carrier Name" text entry field.
    - Enter list of states the shipper will ship to in the "State List" text entry field.
    - Select the "Default" checkbox if this shipping carrier will be default for the site.
    - Enter the URL of the site to track shipments in the "Tracking URL" text entry field.
    - Select "Update Shipping Carrier" to save your changes.
5. On the "Fees" tab:
    - Enter the minumum order value the fee will apply to in the "Minimum Order Value" text entry field.
    - Enter the maximum order value the fee will apply to in the "Maximum Order Value" text entry field.
    - Enter the charge for the shipping fee in the "Shipping Charge" text entry field.
    - Select "Add New Shipping Fee" to save the shipping fee.
    - Repeat the above steps for any additional shipping fees.

To edit a shipping carrier:

1. Locate the shipping carrier you wish to edit in the list of the shipping carriers.
2. Select the "Edit" icon to the right of the shipping carrier entry. The page will redraw and you will see two tabbed pages where information can be modified.
3. Make changes on the "Shipping Carrier Information" tab as necessary. Select "Update Shipping Carrier" to save your changes.
4. Make changes on the "Fees" tab as necessary.

To update the fees for a shipping carrier:

1. In the list of shipping carriers, locate the carrier whose fees will be updated.
2. Select the "Edit" icon to the right of the shipping carrier. The page will redraw and you will see two tabbed pages with additional information on the shipping carrier.
3. Select the "Fees" tab.
4. Modify the fees as necessary.

To remove a shipping carrier:

1. In the list of shipping carriers, locate the shipping carrier that will be removed.
2. Select the "Delete" icon to the right of the shipping carrier. A confirmation box will pop-up.
3. Select "Yes" in the confirmation box.

To activate/deactivate a shipping carrier:

1. In the list of shipping carriers, locate the carrier to be activated/deactivated.
2. To activate the shipping carrier, select the "Active" checkbox to the right of the shipping carrier. Active carriers are available for use on the website.
3. To deactivate the shipping carrier, deselect the "Active" checkbox to the right of the shipping carrier. Inactive shipping carriers are not availabe for use on the website.

Articles in this section

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Home > Site Manager by the Section > Customer Service > Shipping Carriers > Shipping Carrier Information

Shipping Carrier Information

The Shipping Carrier Information tab allows you to manage the attributes of the current shipping carrier.

Active: This checkbox indicates whether or not the current shipping carrier is active. Select or deselect the checkbox to activate or deactivate the carrier. Inactive shipping carriers will not be available on the website.

Shipping Carrier Name: This text entry field contains the name of the shipping carrier. This is the name the carrier will be referred to within Site Manager as well as on the website. This is a required field.

Carrier Code: This text entry entry field contains the code for the shipping carrier. This is a required field.

State List: This text entry field contains the list of states the shipping carrier will ship to.

Default: This check box indicates whether or not this shipping carrier is the default shipping carrier for the site.

Country: This read-only field contains the country the shipping carrier is located in.

Tracking URL: This text entry field contains the URL of the web site where packages can be tracked.

Update Shipping Carrier: This button save the modifications on this tab. No modifications will be saved until this button is selected.

See also

Fees

Home > Site Manager by the Section > Customer Service > Shipping Carriers > Fees

Fees

The Fees tab allows you to manage the shipping fees for the current shipping carrier. Fees are based on the order total amount.
Create a Shipping Fee: This summary box allows you to create a new shipping fee.

- **Minimum Order Value**: This text entry field contains the minimum order value that is required for this shipping fee.
- **Maximum Order Value**: This text entry field contains the maximum order value that is required for this shipping fee.
- **Shipping Charge**: This text entry field contains the amount that will be charged for shipping for this shipping fee.
- **Add New Shipping Fee**: This button saves the new shipping fee. The shipping fee will be add to the shipping list in the lower portion of the page.

Shipping Fee List: This list contains a list of all of the shipping fees defined for the site. To edit a shipping fee, select the "Edit" icon. To remove a shipping fee, select the "Delete" icon.

See also

Shipping Carrier Information

Home > Site Manager by the Section > Customer Service > Promotions

Promotions

Use this page to view the promotions that are currently defined within the system. This page is available only when working with a B2C site. Modifications to promotions cannot be made through this page and should instead be made through the Experiences section.

If you are working with a multiple-site configuration, use the "Change Site" drop-down list box at the top of the screen to select the site you are working with. Only the promotions for the selected site will be available. If you are working with a single-site configuration, the "Change Site" drop-down list box is not available and no site selection is required.

If you are working with an international site, use the "Select Locale" drop-down list box at the top of the screen to select the locale you are working with. Only the promotions for the selected locale will be available. If your site is not an international site, the "Select Locale" drop-down list box will not be available.

Name: The name of the experience that the promotion is defined within.

Group Type: The type of the promotion.

Active: Indicates whether or not the promotion is active.

Start: The start date and time of the promotion. "Immediate" indicates the promotion began as soon as it was created.

End: The end date and time of the promotion. "Indefinite" indicates the promotion will continue until it is canceled by hand.

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Gift Card/Certificate Balance

Use this page to view the balance on a gift card or a gift certificate. This page is available only when working with a B2C site. Modifications to the balance may not be made through this screen.

If you are working with a multiple-site configuration, use the "Change Site" drop-down list box at the top of the screen to select the site you are working with. Only the gift cards and gift certificates for the selected site will be available. If you are working with a single-site configuration, the "Change Site" drop-down list box is not available and no site selection is required.

If you are working with an international site, use the "Select Locale" drop-down list box at the top of the screen to select the locale you are working with. Only the gift cards and gift certificates for the selected locale will be available. If your site is not an international site, the "Select Locale" drop-down list box will not be available.

Gift Card/Certificate Number: The number of the gift card or the gift certificate.

PIN Number: The PIN number of the gift card or the gift certificate.

Get Balance: Select this button to retrieve the balance on the gift card or gift certificate. Balance information will appear beneath this button.

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Home > Site Manager by the Section > Customer Service > Business Partner Accounts

Business Partner Accounts

In the Business Partner Accounts portion of the Customer Service section you can manage the accounts of your business partners. This section is only available when working with a B2B site.

If you are working with a multiple-site configuration, use the "Change Site" drop-down list box at the top of the screen to select the site you are working with. Only the business partner accounts for the selected site will be available. If you are working with a single-site configuration, the "Change Site" drop-down list box is not available and no site selection is required.

If you are working with an international site, use the "Select Locale" drop-down list box at the top of the screen to select the locale you are working with. Only the business partner accounts for the selected locale will be available. If your site is not an international site, the "Select Locale" drop-down list box will not be available.

To find a business partner account:

1. In the "Find a BPA" tab box, enter your search criteria for the business partner account in the various text boxes.
2. Select "Find". The page will refresh and a list of all of the business partner accounts matching your search criteria will be displayed.

To edit a business partner account:

1. Follow the rules above to find the business partner account you wish to change.
2. In the list of search results, select either the "Account ID" or the "Edit" icon of the business partner account you wish to change. The page will refresh with tabs for "Profile", "Ship-to Addresses", "Purchasing", and "Associations".
3. On the "Profile" tab, make all the changes that are necessary. Select "Update Profile" to save your modifiations.
4. Select the "Ship-to Addresses" tab and make all necessary changes on that tab.
5. Select the "Purchasing" tab and make all necessary changes on that tab. Select "Update Purchasing" to save your modifications.
6. Select the "Associations" tab and make all necessary changes on that tab.

To create a new business partner account:

1. Select the "Create a BPA" tab. Enter the required information on that tab, then select "Create BPA". The page will refresh with tabs for "Profile", "Ship-to Addresses", "Purchasing", and "Associations".
2. On the "Profile" tab, enter all the information necessary about the business partner account. Select "Update Profile" to save your modifications.
3. On the "Ship-to Addresses" tab, enter all the ship-to addresses for the business partner account.
4. On the "Purchasing" tab, enter all the purchasing requirements for the business partner account. Select "Update Purchasing" to save your modifications.
5. On the "Associations" tab, add all the customer associations necessary for the business partner account.

To activate a business partner account:

1. Follow the instructions to find a business partner account.
2. In the list of search results, select the "Active" icon for the business partner account you wish to activate.

To deactivate a business partner account:

1. Follow the instructions to find a business partner account.
2. In the list of search results, deselect the "Active" icon for the business partner account you wish to deactivate. Inactive accounts will not be available on the website.

To change the contact information for a business partner account:

1. Follow the instructions to find a business partner account.
2. In the list of search results, select either the account number or the "Edit" icon of the business partner account you wish to modify.
3. On the "Profile" tab, modify the contact information for the account.
4. Select "Update Profile" to save your modifications.

To change the billing address for a business partner account:

1. Follow the instructions to find a business partner account.
2. In the list of search results, select either the account number or the "Edit" icon of the business partner account you wish to modify.
3. On the "Profile" tab, modify the billing address for the account.
4. Select "Update Profile" to save your modifications.

To change the shipping addresses for a business partner account:

1. Follow the instructions to find a business partner account.
2. In the list of search results, select either the account number or the "Edit" icon of the business partner account you wish to modify.

3. Select the "Ship-to Addresses" tab.
4. Make the necessary changes to the shipping addresses.

To change a business partner account's payment methods:

1. Follow the instructions to find a business partner account.
2. In the list of search results, select either the account number or the "Edit" icon of the business partner account you wish to modify.
3. Select the "Purchasing" tab.
4. Make the necessary modifications to the purchasing fields.
5. Select "Update Purchasing" to change your modifications.

To associate a customer with a business partner account:

1. Follow the instructions to find a business partner account.
2. In the list of search results, select either the account number or the "Edit" icon of the business partner account you wish to modify.
3. Select the "Associations" tab.
4. Select "Choose Customer". A pop-up dialog box will appear. Use the search fields in that box to search for the customer you wish to add to the account. In the search results list, select the "Select" checkbox to add a customer to the account. Dismiss the dialog box once you have added all the customers.

Articles in this section

Find a BPA   Create a BPA   Profile   Ship-to Addresses   Purchasing   Associations

See also

Customers
Search Orders
Stores
Mobile App Notifications
Shipping Carriers
Promotions
Gift Card/Certificate Balance

Legal Notices

Home > Site Manager by the Section > Customer Service > Business Partner Accounts > Find a BPA

Find a BPA

The Find a BPA tab allows you to find a business partner account. This tab is only available if you are working with a B2B site. You may search for an account on any combination of specifics, based on which of the entry fields you fill in. If you leave all the search specifics fields blank, all business partner accounts will be returned as the search results. For general information on working with business partner accounts, see the Business Partner Accounts page.

Account ID: Enter the identification number of the account you are searching for in this field.

Account Name: Enter the name of the account you are searching for in this field.

Admin Contact First Name: Enter the first name of the administrative contact of the account you are searching for in this field.

Admin Contact Last Name: Enter the last name of the administrative contact of the account you are searching for in this field.

City: Enter the city of the business partner you are searching for in this field.

State: Select the state of the business partner you are searching for in this field.

Account Status: Select the status of the business partner account you are searching for. The available options are:

- **Active & Inactive**: Select this option if you are interested in accounts that are both active and inactive.
- **Active**: Select this option if you are only interested in accounts that are active.
- **Inactive**: Select this option if you are only interested in accounts that are inactive.

Find: Select this button to search for business partner accounts that match your search specifics. If you left all fields blank, all business partner accounts will be returned. Matching business partner accounts will be displayed beneath the "Find a BPA" tab.

See also

Create a BPA
Profile
Ship-to Addresses
Purchasing
Associations

Create a BPA

The Create a BPA tab allows you to create a new business partner account. This tab is only available if you are working with a B2B site. For general information on working with accounts, see the Business Partner Accounts page.

Account Name: Enter the name that the business partner account should have. This is a required field.

Admin Contact First Name: Enter the first name of the administrative contact for the account.

Admin Contact Last Name: Enter the last name of the administrative contact for the account.

Create BPA: Select this to create the business partner account. The page will redraw and tabs for "Profile", "Ship-to Addresses", "Purchasing", and "Associations" will appear. Enter the appropriate information in each of the tabs.

See also

Find a BPA
Profile
Ship-to Addresses
Purchasing
Associations

Home > Site Manager by the Section > Customer Service > Business Partner Accounts > Profile

Profile

The Profile tab allows you to manage the corporate information of the business partner account. This tab is only available if you are working with a B2B site.

BPA Information: This summary box contains information about the business partner account.

- **Account Status**: These radio buttons indicate whether or not the account is active. This is a required field.
  - **Active**: This selection indicates that the account is active.
  - **Inactive**: This selection indicates that the acount is inactive. Inactive accounts will not be available for use within the site.
- **Account Name**: This field indicates the name of the account. This is a required field.
- **Admin Contact First Name**: This field indicates the first name of the administrative contact of the account.
- **Admin Contact Last Name**: This field indicates the last name of the administrative contact of the account.
- **Admin Contact Email Address**: This field indicates the email address of the administrative contact of the account.
- **Admin Contact Phone Number**: This field indicates the phone number of the administrative contact of the account.
- **Reference Customer Account ID**: This field indicates the account number used in an external system for the account.

BPA Billing Information: This summary box contains the billing address of the business partner account.

- **Company Name**: This field contains the name of the company. This is a required field.
- **First Name**: This field contains the first name of the person receiving email. This is a required field.
- **Last Name**: This field contains the last name of the person receiving email. This is a required field.
- **Address 1**: This field indicates the first line of the street address of the account. This is a required field.
- **Address 2**: This field indicates the second line of the street address of the account.
- **City**: This field indicates the city of the account. This is a required field.
- **State**: This field indicates the state of the account. This is a required field.
- **Zip Code**: This field indicates the zip code of the account. This is a required field.
- **Phone Number**: This field indicates the primary phone number of the account. This is a required field.
- **Additional Phone Nu**mber: This field indicates a secondary phone number for the account.

Company Information: This summary box contains information on the company associated with the business partner account.

- **Revenue (per year)**: This field indicates the yearly revenue of the company.
- **Number of Employees**: This field indicates the number of employees at the company.
- **Type of Business**: This field indicates the type of business for the company. This is a required field.
- **DUNS Number**: This field indicates the DUNS number for the company. This is a required field.
- **Tax Status**: These radio buttons indicate the tax exempt status of the company. This is a required field.
  - **Not Tax Exempt**: This field indicates the company is not tax exempt.
  - **Tax Exempt**: This field indicates the company is tax exempt. If this field is selected, a tax ID number must also be provided.
  - **Tax ID Number**: This field indicates the tax id number of a tax exempt company. This number is required for all tax exempt companies.
- **Year Established**: This field indicates the year the company was established.

BPA Logo: This summary box contains logo associated with the business partner account. Select "Add Image" to add an image to the account.

Update: This button updates the database with the modifications made on this page. No modifications will be saved until this button is selected.

See also

Find a BPA
Create a BPA
Ship-to Addresses
Purchasing
Associations

Ship-to Addresses

The Ship-to Addresses tab allows you to maintain the shipping addresses for the business partner account. This tab is only available if you are working with a B2B site.

Lock Ship-to Addresses (Users can only ship to the addresses listed here): This checkbox indicates whether or not items can be shipped to addresses not listed as a ship-to address. If the checkbox is selected, items may only be shipped to one of the addresses entered here.

First Name: This field indicates the first name of the person receiving the items. This is a required field.

Last Name: This field indicates the last name of the person receiving the items. This is a required field.

Company Name: This field indicates the name of the company receiving the items. This is a required field.

Address 1: This field indicates the first address line of the company receiving the items. This is a required field.

Address 2: This field indicates the second address line of the company receiving the items. This is an optional field.

City: This field indicates the city of the company receiving the items. This is a required field.

State: This field indicates the state of the company receiving the items. This is a required field.

Zip Code: This field indicates the zip code of the company receiving the items. This is a required field.

Phone Number: This field indicates the phone number of the person/company receiving the items. This is a required field.

Additional Phone Number: This field indicates a second phone number for the person/company receiving the items. This is an optional field.

Add: This button stores the modifications made to the shipping address to the database. No modifications are saved until this button is selected.

Cancel: This button cancels the modifications made to the shipping address.

Address List: This is a list of all the shipping addresses currently defined for the business partner account. Select the "Edit" icon to make changes to a shipping address in the list, or select "Delete" to remove a shipping address from a business partner account.

See also

Find a BPA
Create a BPA
Profile
Purchasing
Associations

Purchasing

The Purchasing tab allows you to maintain the purchasing options for the business partner account. This tab is only available if you are working with a B2B site.

Price List: This drop-down list box indicates the price list available for use with the business partner account. This is a required field.

Allowed Payment Methods: This set of radio buttons indicates the ways in which the business partner account may pay for their order. This is a required field.

- **Credit Cards Only**: This radio button indicates the business partner account must use a credit card to pay for their order.
- **Invoices Only (entry of PO# for order will be mandatory)**: This radio button indicates the business partner account must use an invoice to pay for their order. A purchase order number will be required for the order to be placed.
- **Credit Cards and Invoices (entry of PO# will be mandatory)**: This radio button indicates the business partner account may use either a credit card or an invoice to pay for their order. If paying with an invoice, a purchase order number will be required for the order to be placed.

Optional Entry of Purchase Order Number: This set of radio buttons indicates where purchase order numbers may be entered on an order. This is a required field.

- **For Order Only**: This radio button indicates that purchase order numbers can only be associated with an entire order.
- **For Each Item in Order Only**: This radio button indicates the purchase order numbers must be associated with each item in the order.
- **For Both Order and Each Item**: This radio button indicates that purchase order numbers can be associated with each item in an order, as well as with the entire order.

Order Minimum Value: This set of radio buttons indicate whether or not orders must meet minimum purchase requirements. This is a required field.

- **No Minimum**: This radio button indicates that there is no minimum purchase requirement for the business partner account. Orders may be placed with any total amount.
- **Minimum of**: This radio button indicates that orders must meet a minimum purchase requirement. Orders cannot be placed until the minimum purchase amount has been reached. The minimum amount is entered in the text box following this radio button.

Free Shipping Based on Order Value: This set of radio buttons indicate whether or not free shipping is available for the business partner account. This is a required field.

- **No Free Shipping Based on Order Value**: This radio button indicates that free shipping is never offered for this business partner account.
- **Minimum Order Value of**: This radio button indicates that free shipping is available for the business partner account once a minimum order amount has been reached. The minimum amount is entered in the text field after this radio button.

Update Purchasing: This button saves the modifications made on this tab to the database. No modifications are saved until this button is selected.

See also

Find a BPA
Create a BPA
Profile
Ship-to Addresses
Associations

Associations

The Associations tab allows you manage the customers associated with the business partner account. This tab is only available if you are working with a B2B site.

Choose Customer: This button generates a pop-up box that allows you to search for and select customers to associate with this business partner account. Each customer selected on the pop-up will be added to the customer list on this tab.

Customer List: This list contains all the customers associated with this business partner account.

- **Name**: This field indicates the first and last name of the customer.
- **Company**: This field indicates the company name of the customer.
- **Email**: This field indicates the email address of the customer.
- **Remove**: Select this icon to remove the customer from the list of customers associated with this business partner account.

See also

Find a BPA
Create a BPA
Profile
Ship-to Addresses
Purchasing

Home > Site Manager by the Section > Reporting

Reporting

The Reporting section of the Site Manager allows you to run reports to monitor various activities on the site.

Articles in this section

Customers

Experiences

Orders

Products

Site Activity

Site Administration

Gigya Reports

See also

Product Catalog
Content
Experiences
Search
Customer Service
Users and Roles
System Tools

Customers

In the Customers portion of Reporting you can execute reports that contain information on the customers visiting the site.

Articles in this section

Largest Wish Lists

Most Prolific Customers

See also

Experiences
Orders
Products
Site Activity
Site Administration
Gigya Reports

Home > Site Manager by the Section > Reporting > Customers > Largest Wish Lists

Largest Wish Lists

This report lists the customers who have the greatest number of items in their wish lists.

- **Results to Show**: Use this drop-down list box to select the number of customers with large wish lists to include in the report.
- **Show Categories**: Use this drop-down list box to select whether or not to show the categories the items in the wish lists are in.
- **Format**: Use this drop-down list box to select the format the report should be prepared in.
- **Country**: Use this drop-down list box to select which country to show wish lists for. This field is available only on international sites.
- **OK**: Select this to begin the generation of the report. The report will appear in the bottom portion of the screen.

See also

Most Prolific Customers

Home > Site Manager by the Section > Reporting > Customers > Most Prolific Customers

Most Prolific Customers

This report contains a list of the customers who have purchased the greatest monetary amount of goods on the site.

- **Start Date**: Use this calendar control to enter the start date of the time period the report will cover.
- **End Date**: Use this calendar control to enter the end date of the time period the report will cover.
- **Results to Show**: Use this drop-down list box to select the number of entries to list in the report.
- **Show Categories**: Use this drop-down list box to select whether or not to include the categories the customer's purchased items from in the report.
- **Format**: Use this drop-down list box to select the format to generate the report in.
- **Country**: Use this drop-down list box to select the country to select customers from. This field is available only on international sites.
- **OK**: Select this icon to begin the generation of the report. The report will appear in the lower portion of the screen.

See also

Largest Wish Lists

Home > Site Manager by the Section > Reporting > Experiences

Experiences

In the Experiences portion of Reporting you may run reports that show the performance of the experiences set up for the site.

Articles in this section

Experience Performance

See also

Customers
Orders
Products
Site Activity
Site Administration
Gigya Reports

Home > Site Manager by the Section > Reporting > Experiences > Experience Performance

Experience Performance

The Experience Performance report provides statistics on how much revenue an experience has generated.

- **Start Date**: Use this calendar control to select the beginning date for the time interval of the report.
- **End Date**: Use this calendar control to select the end date of the time interval of the report.
- **Interval**: Use this drop-down list box to select the interval to use in the creation of the data in the report. The report entries will be listed by interval unit.
- **Experience**: Use this drop-down list box to select the experience the report will cover.
- **Branch**: Use this drop-down list box to select which branch of the selected experience the report will cover.
- **Format**: Use this drop-down list box to select the format the report will be generated in.
- **OK**: Select this to begin execution of the report. The report will appear in the lower portion of the screen.

Orders

In the Orders portion of Reporting you may run reports that show information about the orders placed on the site.

Articles in this section

Orders Placed

Orders Placed (Graph)

See also

Customers
Experiences
Products
Site Activity
Site Administration
Gigya Reports

Orders Placed

The Orders Placed report provides information on the orders that have been placed on the site during the selected timeframe.

- **Start Date**: Use this calendar control to enter the start date of the time period the report will cover.
- **End Date**: Use this calendar control to enter the end date of the time period the report will cover.
- **Interval**: Use this drop-down list box to select the interval to group the report information over.
- **Format**: Use this drop-down list box to select the format to generate the report in.
- **Country**: Use this drop-down list box to select the country to select customers from. This field is available only on international sites.
- **OK**: Select this icon to begin the generation of the report. The report will appear in the lower portion of the screen.

See also

Orders Placed (Graph)

Orders Placed (Graph)

The Orders Placed graph report provides graphical information on the orders that have been placed on the site during the selected timeframe.

- **Start Date**: Use this calendar control to enter the start date of the time period the report will cover.
- **End Date**: Use this calendar control to enter the end date of the time period the report will cover.
- **Interval**: Use this drop-down list box to select the interval to group the report information over.
- **Format**: Use this drop-down list box to select the format to generate the report in.
- **Country**: Use this drop-down list box to select the country to select customers from. This field is available only on international sites.
- **OK**: Select this icon to begin the generation of the report. The report will appear in the lower portion of the screen.

See also

Orders Placed

Products

In the Products section of Reporting you can run reports that provide information on the products in the product catalog.

Articles in this section

Products Not in an Active Category

Products Without an Active Variant

Products Without an Image

Variants out of Stock in DC

See also

Customers
Experiences
Orders
Site Activity
Site Administration
Gigya Reports

Products Not in an Active Category

The Products Not in an Active Category report provides information on the products that are not in an active category. This products will not appear on the web site.

- **Format**: Use this drop-down list box to select the format to generate the report in.
- **Country**: Use this drop-down list box to select the country to select customers from. This field is available only on international sites.
- **OK**: Select this icon to begin the generation of the report. The report will appear in the lower portion of the screen.

See also

Products Without an Active Variant
Products Without an Image
Variants out of Stock in DC

Home > Site Manager by the Section > Reporting > Products > Products Without an Active Variant

Products Without an Active Variant

The Products Without an Active Variant report provides information on the products that have no active variants. Without an active variant, a product cannot be sold on the web site.

- **Format**: Use this drop-down list box to select the format to generate the report in.
- **Country**: Use this drop-down list box to select the country to select customers from. This field is available only on international sites.
- **OK**: Select this icon to begin the generation of the report. The report will appear in the lower portion of the screen.

See also

Products Not in an Active Category
Products Without an Image
Variants out of Stock in DC

Home > Site Manager by the Section > Reporting > Products > Products Without an Image

Products Without an Image

The Products Without an Active Image report provides a list of the products that do not have an active image.

- **Format**: Use this drop-down list box to select the format to generate the report in.
- **Country**: Use this drop-down list box to select the country to select customers from. This field is available only on international sites.
- **OK**: Select this icon to begin the generation of the report. The report will appear in the lower portion of the screen.

See also

Products Not in an Active Category
Products Without an Active Variant
Variants out of Stock in DC

Home > Site Manager by the Section > Reporting > Products > Variants out of Stock in DC

Variants out of Stock in DC

The Variants out of Stock in DC report provides information on the product variants that are currently out of stock.

- **Format**: Use this drop-down list box to select the format to generate the report in.
- **Country**: Use this drop-down list box to select the country to select customers from. This field is available only on international sites.
- **OK**: Select this icon to begin the generation of the report. The report will appear in the lower portion of the screen.

See also

Products Not in an Active Category
Products Without an Active Variant
Products Without an Image

Home > Site Manager by the Section > Reporting > Site Activity

Site Activity

In the Site Activity section of Reporting you can run reports that provide information on various activities that can take place on the site.

Articles in this section

Address Book Entries Added
Email Sign Ups
New Member Registrations
User Sessions Created
Wish List Items Added
Zero Search Results

See also

Customers
Experiences
Orders
Products
Site Administration
Gigya Reports

Address Book Entries Added

The Address Book Entries Added report provides a graph showing the number of additions to the address books of members during the selected timeframe.

- **Start Date**: Use this calendar control to select the beginning date for the time interval of the report.
- **End Date**: Use this calendar control to select the end date of the time interval of the report.
- **Interval**: Use this drop-down list box to select the interval to use in the creation of the data in the report. The report entries will be listed by interval unit.
- **Format**: Use this drop-down list box to select the format the report will be generated in.
- **OK**: Select this to begin execution of the report. The report will appear in the lower portion of the screen.

See also

Email Sign Ups
New Member Registrations
User Sessions Created
Wish List Items Added
Zero Search Results

Home > Site Manager by the Section > Reporting > Site Activity > Email Sign Ups

Email Sign Ups

The Email Sign-Ups report provides a graph showing the number of email sign-ups during the selected timeframe.

- **Start Date**: Use this calendar control to select the beginning date for the time interval of the report.
- **End Date**: Use this calendar control to select the end date of the time interval of the report.
- **Interval**: Use this drop-down list box to select the interval to use in the creation of the data in the report. The report entries will be listed by interval unit.
- **Format**: Use this drop-down list box to select the format the report will be generated in.
- **OK**: Select this to begin execution of the report. The report will appear in the lower portion of the screen.

See also

Address Book Entries Added
New Member Registrations
User Sessions Created
Wish List Items Added
Zero Search Results

Home > Site Manager by the Section > Reporting > Site Activity > New Member Registrations

New Member Registrations

The New Member Registrations report provides a graph showing the number of new members added to the site during the selected timeframe.

- **Start Date**: Use this calendar control to select the beginning date for the time interval of the report.
- **End Date**: Use this calendar control to select the end date of the time interval of the report.
- **Interval**: Use this drop-down list box to select the interval to use in the creation of the data in the report. The report entries will be listed by interval unit.
- **Format**: Use this drop-down list box to select the format the report will be generated in.
- **OK**: Select this to begin execution of the report. The report will appear in the lower portion of the screen.

See also

Address Book Entries Added
Email Sign Ups
User Sessions Created
Wish List Items Added
Zero Search Results

Home > Site Manager by the Section > Reporting > Site Activity > User Sessions Created

User Sessions Created

The User Sessions Created report provides a graph showing the number of visits to the web site during the selected timeframe.

- **Start Date**: Use this calendar control to select the beginning date for the time interval of the report.
- **End Date**: Use this calendar control to select the end date of the time interval of the report.
- **Interval**: Use this drop-down list box to select the interval to use in the creation of the data in the report. The report entries will be listed by interval unit.
- **Format**: Use this drop-down list box to select the format the report will be generated in.
- **OK**: Select this to begin execution of the report. The report will appear in the lower portion of the screen.

See also

Address Book Entries Added
Email Sign Ups
New Member Registrations
Wish List Items Added
Zero Search Results

Wish List Items Added

The Wish List Items Added report provides a graph showing the number of items added to wish lists of members during the selected timeframe.

- **Start Date**: Use this calendar control to select the beginning date for the time interval of the report.
- **End Date**: Use this calendar control to select the end date of the time interval of the report.
- **Interval**: Use this drop-down list box to select the interval to use in the creation of the data in the report. The report entries will be listed by interval unit.
- **Format**: Use this drop-down list box to select the format the report will be generated in.
- **OK**: Select this to begin execution of the report. The report will appear in the lower portion of the screen.

See also

Address Book Entries Added
Email Sign Ups
New Member Registrations
User Sessions Created
Zero Search Results

Zero Search Results

The Zero Search Results report provides a list of the search terms that have been used on the site and did not provide a matching search result.

- **Start Date**: Use this calendar control to select the beginning date for the time interval of the report.
- **End Date**: Use this calendar control to select the end date of the time interval of the report.
- **Results to Show**: Use this drop-down list box to select the number of search results to show in the report.
- **Format**: Use this drop-down list box to select the format the report will be generated in.
- **OK**: Select this to begin execution of the report. The report will appear in the lower portion of the screen.

See also

Address Book Entries Added
Email Sign Ups
New Member Registrations
User Sessions Created
Wish List Items Added

Home > Site Manager by the Section > Reporting > Site Administration

Site Administration

In the Site Administration section of Reporting you can run reports that provide information on .administrative changes that have occurred on the site.

Articles in this section

Audit Records

See also

Customers
Experiences
Orders
Products
Site Activity
Gigya Reports

Audit Records

The Audit Records report provides a list of activities performed in the Site Manager by the selected Site Manager user(s).

- **Start Date**: Use this calendar control to select the beginning date for the time interval of the report.
- **End Date**: Use this calendar control to select the end date of the time interval of the report.
- **Record Type**: Use this drop-down list box to select the type of activity to include in the report.
- **User Name**: Use this drop-down list box to select the name of the user to include in the report.
- **Entity ID**: Enter the internal identifier of the object to be included in the report. If this field is left blank, all entities will be included.
- **Format**: Use this drop-down list box to select the format the report will be generated in.
- **OK**: Select this to begin execution of the report. The report will appear in the lower portion of the screen.

Home > Site Manager by the Section > Reporting > Gigya Reports

Gigya Reports

The Gigya Records report section provides a number of different reports that use the information gathered from the site's use of the Gigya social product.

- **Start Date**: Use this calendar control to select the beginning date for the time interval of the report.
- **End Date**: Use this calendar control to select the end date of the time interval of the report.
- **Report**: Use this drop-down list box to select the report to run.
- **OK**: Select this to begin execution of the report. The report will appear in the lower portion of the screen.

See also

Customers
Experiences
Orders
Products
Site Activity
Site Administration

Users and Roles

The Users and Roles section of the Site Manager allows you to manage the administrative users who will use the Site Manager, their roles, and their privileges. You may add and remove users, assign roles to them, and modify their priveleges.

Articles in this section

Users

Roles

Role Groups

Privileges

See also

Product Catalog
Content
Experiences
Search
Customer Service
Reporting
System Tools

Home > Site Manager by the Section > Users and Roles > Users

Users

Use this page to manage the users that have access to the system. You may add and delete users and change their permissions.

To create a new user:

1. In the "Create A User" box, enter a username for the user in the "User Nname" text box.
2. Enter a password for the user in the "Password" text box.
3. Select "Create User". A new page will appear with tabs for "Details", "Roles", and "Groups".
4. To create the details of the user:
   - Select the "Details" tab. (See Details for additional information.)
   - Enter a username in the "User Name:" text box.
   - Enter a password in the "Password:" text box. Follow the password creation guidelines in the "To change a user's password" section below.
   - Enter the user's first and last name in the "First Name:" and "Last Name" text boxes.
   - Enter an email address in the "Email Address" text box.
   - Activate the user by checking the "Active" checkbox.
   - Select "Update User Info" to save your changes.
5. To assign some roles to the user:
   - Select the "Roles" tab. (See Roles for additional information.)
   - Select a role in the "Not Assigned" list box. Select the "Add" button to move that role into the "Assigned Roles" list box and assign the role to the user.
6. To assign the user to some groups:
   - Select the "Groups" tab. (See Groups for additional information.)
   - Select a group in the "Not Assigned" list box. Select the "Add" button to move that group to the "Assigned Groups" list box and assign the user to the group.
7. Select "Back to Users List" to return to the previous page.

To deactivate a user:

1. Un-check the "Active" checkbox to the right of the user's name.

To activate a user:

1. Check the "Active" checkbox to the right of the user's name.

To remove a user:

1. Select the "Delete" icon to the right of the user's name.
2. Select "Yes" in the confirmation box that pops up.

To change a user's password:

1. Select the user's username from the list or select the "Edit" icon to the right of their name. A new page will appear with tabs for "Details", "Roles", and "Groups".
2. Select the "Details" tab. (See Details for additional information.)
3. Enter the new password in the "Password" text field. The password must meet the following criteria:
   - It must be at least 8 characters long.
   - It must contain one alphabetic character [a-zA-Z]
   - It must contain one numeric character [0-9]
   - It must contain one special character from this set: ` ! @ $ % ^ & * ( ) - _ = + [ ] ; : ' " , < . > / ?
   - It must not contain spaces.
   - It must not being with an exclamation point or a question mark.
   - The first three letters cannot be the same.
   - The new password cannot be the same as your last four passwords.
4. Select "Update User Info" to save the new password.
5. Select "Back to Users List" to return to the previous page.

To modify a user's details:

1. Select the user's username from the list or select the "Edit" icon to the right of their name. A new page will appear with tabs for "Details", "Roles", and "Groups".
2. Select the "Details" tab. (See Details for additional information.)
3. To modify their username, enter a new username in the "User Name" text box.
4. To modify their password, enter a new password in the "Password" text box. Follow the password creation guidelines in the "To change a user's password" section above.
5. To modify their first or last name, enter the new information in the "First Name" or "Last Name" text box.
6. To modify their email adddress, enter a new email address in the "Email Address" text box.

7. To activate the user, check the "Active" checkbox.
8. To make the user inactive, un-check the "Active" checkbox. Inactive users may not log into the system.
9. Select "Update User Info" to save your changes.
10. Select "Back to Users List" to return to the previous page.

To modify the roles and/or groups assigned to a user:

1. Select the user's username from the list or select the "Edit" icon to the right of their name. A new page will appear with tabs for "Details", "Roles", and Groups".
2. Select the "Roles" tab.   (See Roles for additional information.)
    - To assign a new role to the user, select the role in the "Not Assigned" list box. Select the "Add" button to move that role into the "Assigned Roles" list box and assign the role to the user.
    - To remove a role from a user, select the role in the "Assigned Roles" listbox. Select the "Remove" button to move that role to the "Not Assigned" list box and remove that role from the user.
3. Select the "Groups" tab.   (See Groups for additional information.)
    - To add the user to a group, select the group in the "Not Assigned" list box. Select the "Add" button to move that group to the "Assigned Groups" list box and assign the user to the group.
    - To remove the user from a group, select the group in the "Assigned Groups" list box. Select the "Remove" button to move that group to the "Not Assigned" list box and remove the user from that group.
4. Select "Back to User List" to return to the previous page.

Articles in this section

Details   Roles   Groups

See also

Roles
Role Groups
Privileges

Home > Site Manager by the Section > Users and Roles > Users > Details

Details

The Details tab provides name and contact information for the Site Manager user.

Active: Select or deselect this checkbox to activate or inactivate the user's login account. Users with inactive accounts will not be able to log in.

User Name: This text box contains the login name the user will use.

Password: This text box contains the password the user will use. The characters for the password will be replaced by dots in this field. New passwords can be set by deleting the dots and typing the appropriate characters. Passwords must meet the following restrictions:

- They must be at least 8 characters long.<
- They must contain one alphabetic character [a-zA-Z]
- They must contain one numeric character [0-9]
- They must contain one special character from this set: ` ! @ $ % ^ & * ( ) - _ = + [ ] ; : ' " , < . > / ?
- They must not contain spaces.
- They must not being with an exclamation point or a question mark.
- The first three letters cannot be the same.
- The new password cannot be the same as your last four passwords.

First Name: This text box contains the first name of the user.

Last Name: This text box contains the last name of the user.

Email Address: This text box contains the email address of the user.

Update User Info: This button saves any changes to the user. Changes to the user's information will not be saved unless this button is selected.

See also

Roles
Groups

Home > Site Manager by the Section > Users and Roles > Users > Roles

Roles

The Roles tab lists the user privelege roles that can be assigned to Site Manager user. These roles are tailored for your website and contain all the priveleges necessary to complete the tasks a user in each role needs to be able to do. Changes to the roles assigned to a user are effective immediately.

Assigned Roles: This list box contains a list of all of the roles currently assigned to the user.

Not Assigned: This list box contains a list of all of the roles not currently assigned to the user.

Add: Selecting this button will move a role from the "Not Assigned" list to the "Assigned Roles" list. Select the role to be moved, then select this button.

Remove: Selecting this button will move a role from the "Assigned Roles" list to the "Not Assigned" list. Select the role to be moved, then select this button.

See also

Details
Groups

Groups

The Groups tab contains the list of all of the Role Groups that can be assigned to a Site Manager user. The Role Groups have been customized for your site and contain the individual roles and privileges that are necessary to do the tasks associated with each role group. Changes to the role groups assigned to a user are effective immediately.

Assigned Groups: This list box contains a list of all of the role groups currently assigned to the user.

Not Assigned: This list box contains a list of all of the role groups not currently assigned to the user.

Add: Selecting this button will move a role group from the "Not Assigned" list to the "Assigned Groups" list. Select the role group to be moved, then select this button.

Remove: Selecting this button will move a role group from the "Assigned Groups" list to the "Not Assigned" list. Select the role group to be moved, then select this button.

See also

Details
Roles

Roles

Use this page to manage the roles that are defined in the system. You can add, delete, and modify roles. You can assign or remove users from those roles. You can also assign or remove privileges for each role.

To create a role:

1. In the "Create A Role" tab box, enter the name of the new role in the "Role Name" text box.
2. Select "Create Role". A new page will appear with tabs for "Details", "Users", and "Privileges".
3. To enter the details for the role:
   - Select the "Details" tab. (See Details for additional information.)
   - Enter a name in the "Role Name" text box.
   - Enter a description in the "Description" text box.
   - Select "Save Details" to save your changes.
4. To assign users to the role:
   - Select the "Users" tab. (See Users for additional information.)
   - Select a user in the "Not Assigned" list box and select the "Add" button to move them to the "Assigned Users" list box. Repeat for each user that should be assigned to this role.
5. To assign privileges to the role:
   - Select the "Privileges" tab. (See Privileges for additional information.)
   - Select a privilege in the "Not Assigned" list box and select the "Add" button to move it to the "Assigned Privileges" list box. Repeat for each privilege that should be assigned to this role.
6. Select "Back to Role List" to return to the previous page.

To delete a role:

1. Select the "Delete" box to the right of the role.

To edit a role:

1. Select the name of the role or select the "Edit" box to the right of the name of the role. A new page will appear with tabs for "Details", "Users", and "Privileges".
2. To change the role's details, follow the instructions below for "To change a role's details".
3. To change the users assigned to the role, follow the instructions below for "To change the users assigned to the role:".
4. To change the privileges assigned to the role, follow the instructions below for "To change the privileges assigned to a role:".
5. Select "Back to Role List" to return to the previous page.

To change a role's details:

1. Select the name of the role or the "Edit" box to the right of the role you want to change. A new page will appear with tabs for "Details", "Users", and "Privileges".
2. Select the "Details" tab. (See Details for additional information.)
3. To change the name of the role, enter a new name in the "Role Name" text box.
4. To change the description of the role, enter a new description in the "Description" text box.
5. Select "Save Details" to save your changes.
6. Select "Back to Role List" to return to the previous page.

To change the users assigned to a role:

1. Select the name of the role or the "Edit" box to the right of the role you want to change. A new page will appear with tabs for "Details", "Users", and "Privileges".
2. Select the "Users" tab. (See Users for additional information.)
3. To assign a new user to the role, select the user in the "Not Assigned" list box and select the "Add" button to move the user to the "Assigned Users" list box.
4. To remove a user from the role, select the user in the "Assigned Users" list box and select the "Remove" button to move the user to the "Not Assigned" list box.
5. Select "Back to Role List" to return to the previous page.

To change the privileges assigned to a role:

1. Select the name of the role or the "Edit" box to the right of the role you want to change. A new page will appear with tabs for "Details", "Users", and "Privileges".
2. Select the "Privileges" tab. (See Privileges for additional information.)
3. To add a privilege to the role, select a privilege in the "Not Assigned" list box and select the "Add" button to move it to the "Assigned Privileges" list box.
4. To remove a privilege from the role, select a privilege in the "Assigned Privileges" list box and select the "Remove" button to move it to the "Not Assigned" list box.
5. Select "Back to Role List" to return to the previous page.

Articles in this section

Details Users Privileges

See also

Users
Role Groups
Privileges

Home > Site Manager by the Section > Users and Roles > Roles > Details

Details

The Details tab provides some of the details for the role.

Role Name: This text field contains the name of the role. This is how the role will be referred to throughout the Site Manager. This is a required field.

Description: This text field contains a description of the role. The description should include information on the privileges assorted with the role and the tasks that someone assigned this role will be able to do.

Save Details: Select this button to save the changes made on this tab to the database. Changes will not be saved unless this button is selected.

See also

Users
Privileges

Users

The Users tab shows a list of all of the Site Manager users, and which users have been assigned to this role. Changes to the users assigned to the role are effective immediately.

Assigned Users: This list box contains a list of all of the users currently assigned to the role.

Not Assigned: This list box contains a list of all of the users not currently assigned to the role.

Add: Selecting this button will move a user from the "Not Assigned" list to the "Assigned Users" list. Select the user to be moved, then select this button. The user moved will now have all the privileges associated with the role.

Remove: Selecting this button will move a user from the "Assigned Users" list to the "Not Assigned" list. Select the user to be moved, then select this button. The user moved will no longer have the privileges associated with the role.

See also

Details
Privileges

Privileges

The Privileges tab lists the priviliges defined for your site, and shows which privileges are associated with the role. Changes to the privileges assigned to the role are effective immediately.

Assigned Privileges: This list box contains a list of all of the privileges currently assigned to the role.

Not Assigned: This list box contains a list of all of the privileges not currently assigned to the role.

Add: Selecting this button will move a privilege from the "Not Assigned" list to the "Assigned Privileges" list. Select the privilege to be moved, then select this button.

Remove: Selecting this button will move a privilege from the "Assigned Privileges" list to the "Not Assigned" list. Select the privilege to be moved, then select this button.

See also

Details
Users

Home > Site Manager by the Section > Users and Roles > Role Groups

Role Groups

Use this page to manage the role groups for the site. Role groups are combinations of roles that are applicable for the site. You may edit, delete, and create new role groups.

To delete a role group:

1. Select the "Delete" icon to the right of the name of the group you wish to delete.
2. Select "Yes" in the confirmation box that comes up.

To activate a role group:

1. Select the checkbox in the "Active" column of the role group.

To deactivate a role group:

1. Deselect the checkbox in the "Active" column of the role group.

To create a new role group:

1. In the "Create a Group" tab box, enter the name of the new role group in the text box.
2. Select "Create Group". The page refreshes with tabs for "Details", "Roles", and "Users".
3. To enter the details for the role group:
   - Select the "Details" tab. (See Details for additional information.)
   - Select the "Active" checkbox to activate the group.
   - Enter a name for the group in the "Group Name" text box.
   - Enter a description for the group in the "Description" text box.
   - Select "Save Details" to save your changes.
4. To assign roles to the role group:
   - Select the "Roles" tab. (See Roles for additional information.)
   - Select a role in the "Not Assigned" list box. Select the "Add" button to move that role into the "Assigned Roles" list box and assign the role to the role group. Repeat for each role that should be assigned to the role group.
5. To assign users to the role group:
   - Select the "Users" tab. (See Users for additional information.)
   - Select a user in the "Not Assigned Users" list box. Select the "Add" button to move that user into the "Assigned Users" list box and assign the user to the role group. Repeat for each user that should be assigned to the role group.
6. Select "Back to Role Groups List" to return to the previous page.

To edit a role group:

1. Select the "Group Name" of the role group you wish to modify, or select the "Edit" icon to the right of the group name. The page refreshes with tabs for "Details", "Roles", and "Users".
2. To make changes to the details of the group, follow the instructions below for "To change a role groups details:".
3. To make changes to the roles assigned to the group, follow the instructions below for "To change the roles assigned to a role group:".
4. To make changes to the users assigned to the group, follow the instructions below for "To change the users assigned to a role group:".
5. Select "Back to Role Groups List" to return to the previous page.

To change a role group's details:

1. Select the "Group Name" or select the "Edit" icon to the right of the group name. The page refreshes with tabs for "Details", "Roles", and "Users".
2. Select the "Details" tab. (See Details for additional information.)
3. Select the "Active" checkbox to activate the group. Deselect the "Active" checkbox to deactivate the group.
4. To change the name of the group, enter text in the "Group Name" text box.
5. To change the description of the group, enter text in the "Description" text box.
6. Select "Save Details" to save your changes.
7. Select "Back to Role Groups List" to return to the previous page.

To change the roles assigned to a role group:

1. Select the "Group Name" or select the "Edit" icon to the right of the group name. The page refreshes with tabs for "Details", "Roles", and "Users".
2. Select the "Roles" tab. (See Roles for additional information.)
3. To assign a new role to the role group, select the role in the "Not Assigned" list box. Select the "Add" button to move that role into the "Assigned Roles" list box and assign the role to the role group.

4. To remove a role from a role group, select the role in the "Assigned Roles" listbox. Select the "Remove" button to move that role to the "Not Assigned" list box and remove that role from the role group.
5. Select "Back to Role Groups List" to return to the previous page.

To change the users assigned to a role group:

1. Select the "Group Name" or select the "Edit" icon to the right of the group name. The page refreshes with tabs for "Details", "Roles", and "Users".
2. Select the "Users" tab. (See Users for additional information.)
3. To assign a new user to the role group, select the user in the "Not Assigned Users" list box. Select the "Add" button to move that user into the "Assigned Users" list box and assign the user to the role group.
4. To remove a user from a role group, select the user in the "Assigned Users" listbox. Select the "Remove" button to move that user to the "Not Assigned Users" list box and remove that user from the role group.
5. Select "Back to Role Groups List" to return to the previous page.

Articles in this section

Details
Roles
Users

See also

Users
Roles
Privileges

Home > Site Manager by the Section > Users and Roles > Role Groups > Details

Details

The Details tab provides some of the details for the role group.

Active: Select and deselect this checkbox to activate or deactivate the role group. Users assigned to a deactive role group will not have access to the privileges in that group.

Group Name: This text field contains the name of the role group. This is how the role group will be referred to throughout the Site Manager. This is a required field.

Description: This text field contains a description of the role group. The description should include information on the roles assorted with the role group and the tasks that someone assigned this role will be able to do.

Save Details: Select this button to save the changes made on this tab to the database. Changes will not be saved unless this button is selected.

See also

Roles
Users

Home > Site Manager by the Section > Users and Roles > Role Groups > Roles

Roles

The Roles tab shows a list of all of the roles defined for the Site Manager, and which roles have been assigned to this role group. Changes to the roles assigned to the role group are effective immediately.

Assigned Roles: This list box contains a list of all of the roles currently assigned to the role group.

Not Assigned: This list box contains a list of all of the roles not currently assigned to the role group.

Add: Selecting this button will move a role from the "Not Assigned" list to the "Assigned Roles" list. Select the role to be moved, then select this button. The role moved will now be part of the role group.

Remove: Selecting this button will move a role from the "Assigned Roles" list to the "Not Assigned" list. Select the role to be moved, then select this button. The role moved will no longer be part of the role group.

See also

Details
Users

Users

The Users tab shows a list of all of the Site Manager users, and which users have been assigned to this role group. Changes to the users assigned to the role group are effective immediately.

Assigned Users: This list box contains a list of all of the users currently assigned to the role group.

Not Assigned Users: This list box contains a list of all of the users not currently assigned to the role group.

Add: Selecting this button will move a user from the "Not Assigned Users" list to the "Assigned Users" list. Select the user to be moved, then select this button. The user moved will now have all the privileges associated with the role group.

Remove: Selecting this button will move a user from the "Assigned Users" list to the "Not Assigned Users" list. Select the user to be moved, then select this button. The user moved will no longer have the privileges associated with the role group.

See also

Details
Roles

Home > Site Manager by the Section > Users and Roles > Privileges

Privileges

Use this page to manage the privilege groups defined in the site. Privilege groups are combinations of privileges. You may add, delete, and edit privilege groups.

To create a new privilege group:

1. In the "Create a Privilege Group" tab box, enter the name of the new group in the text box.
2. Select "Create Privilege Group". A new page appears with tabs for "Privileges" and "Details".
3. To add privileges to the group:
   - Select the "Privileges" tab. See Privileges for additional information.
   - In the "Create a New Privilege" tab box, enter a name for the privilege in the "Privilege Name" text box.
   - Enter a description for the privilege in the "Description" text box.
   - Select "Create "Privilege".
   - Repeat for each privilege that should be added to the privilege group.
4. To add the details for the privilege:
   - Select the "Details" tab. See Details for additional information.
   - Enter a name for the privilege group in the "Privilege Group Name" text box.
   - Enter a description for the privilege group in the "Description" text box.
   - Select "Save Details" to save your changes.
5. Select "Back to Privilege Group List" to return to the previous page.

To edit a privilege group:

1. Select the "Privilege Name" of the privilege you wish to change, or select the "Edit" icon to the right of the name. A new page appears with tabs for "Privileges" and "Details".
2. To change the privileges assigned to the privilege group, follow the instructions below for "To change the privileges assigned to a privilege group:".
3. To change the details of the privilege group, follow the instructions below for "To change a privilege group's details:".
4. Select "Back to Privilege Group List" to return to the previous page.

To change the privileges assigned to a privilege group:

1. Select the "Privilege Name" of the privilege group you wish to change, or select the "Edit" icon to the right of the name. A new page appears with tabs for "Privileges" and "Details".
2. Select the "Privileges" tab. See Privileges for additional information.
3. To add a privilege to the privilege group, follow the instructions below for "To add a new privilege:".
4. To activate a privilege, check the "Active" checkbox.
5. To deactivate a privilege, uncheck the "Active" checkbox.
6. To remove a privilege from the privilege group, select the "Delete" icon to the right of the privilege name.
7. Select "Back to Privilege Group List" to return to the previous page.

To add a new privilege:

1. Select the "Privilege Name" of the privilege group you want the new privilege to belong to, or select the "Edit" icon to the right of the name. A new page appears with tabs for "Privileges" and "Details".
2. Select the "Privileges" tab. See Privileges for additional information.
3. In the "Create a New Privilege" tab box, enter a name for the privilege in the "Privilege Name" text box.
4. Enter a description for the privilege in the "Description" text box.
5. Select "Create "Privilege".
6. Select "Back to Privilege Group List" to return to the previous page.

To change a privilege group's details:

1. Select the "Privilege Name" of the privilege you wish to change, or select the "Edit" icon to the right of the name. A new page appears with tabs for "Privileges" and "Details".
2. Select the "Details" tab. See Details for additional information.
3. To change the name of the privilege group, enter a name in the "Privilege Group Name" text box.
4. To change the description of the privilege group, enter a new description in the "Description" text box.
5. Select "Save Details" to save your changes.
6. Select "Back to Privilege Group List" to return to the previous page.

To delete a privilege group:

1. Select the "Delete" icon to the right of the privilege group you wish to delete.

Articles in this section


Privileges


Details

See also

Users
Roles
Role Groups

Home > Site Manager by the Section > Users and Roles > Privileges > Privileges

Privileges

The Privileges tab displays the individual privileges in the privilege group. You may also create a new privilege on this tab, although engineering time will be required to hook that privilege into the Site Manager.

Create a New Privilege: This summary box allows you to create a new privilege. Enter the name of the privilege in "Privilege Name" and a description for it in "Description". Select "Create Privilege" to create the privilege. The new priviIige will appear in the list of privileges at the bottom of the page and will be part of the current privilege group.

Privilege list box: This list box contains the list of all of the privileges that are part of the privilege group. Select and deselect the "Active" checkbox to enable and disable any privilege. Select "Delete" to remove any privilege. Any changes made are effective immediately.

See also

Details

Details

The Details tab provides some of the details for the privilege group.

Privilege Group Name: This text field contains the name of the privilege group. This is how the privilege group will be referred to throughout the Site Manager. This is a required field.

Description: This text field contains a description of the privilege group. The description should include information on the privileges assorted with the privilege group and the tasks that someone assigned to this privilege group will be able to do.

Save Details: Select this button to save the changes made on this tab to the database. Changes will not be saved unless this button is selected.

See also

Privileges

System Tools

The System Tools section of the Site Manager provides a variety of tools to monitor the internal performance of the system, as well as import information into and out of the web site.

Articles in this section

Commands   Forms   Pipelines   Job Monitor   Cache Stats   Profiling

Asset Loaders   Import/Export   Logging Settings

See also

Product Catalog
Content
Experiences
Search
Customer Service
Reporting
Users and Roles

Home > Site Manager by the Section > System Tools > Commands

Commands

Use this page to view all of the commands that are configured and active within the command engine. You can also view the number of objects within each command pool for each command.

To get more information on any command:

1. Choose the command you are interested in.
2. Select the "Request Path" of the command. The data for the command will be displayed when the screen refreshes. See Details for additional information on the data that will be displayed.
3. To return to the list of commands, select "Back to Command List".

Articles in this section

Details

See also

Forms
Pipelines
Job Monitor
Cache Stats
Profiling
Asset Loaders
Import/Export
Logging Settings

Details

The Details tab provides additionals details on the Command.

Back to Command List: Use this link to return to the page that lists all the commands defined for the site.

Command Configuration: This summary box contains configuration information for the command.

- **Class Name**: The fully qualified Java class name of the class that implements this command.
- **Request Path**: The request path that should be used to invoked this command.
- **Input Page**: The name of the input page associated with this command.
- **Form Name**: The name of the form used in association with this command.
- **Validating**: Indicates whether or not the form will be validating the user data on the input page.

Pool Statistics: This summary box contains information about the command pool used for this command. The pool is used to hold instances of the command.

- **Current Pool Size**: The number of commands in the pool, plust the number of commands currently in use.
- **Highest Capacity**: The largest number of commands that were ever in the pool.
- **Current Waiters**: The current number of threads that are waiting to retrieve a command from the pool.
- **Highest Waiters**: The largest number of threads that were ever waiting to retrieve a command from the pool.
- **Highest Wait Milliseconds**: The longest amount of time in milliseconds that a thread had to wait to retrieve a command from the pool.

Pool Configurations: This summary box contains the configuration information that was set for the command pool.

- **Maximum Capacity**: The maximum number of commands that will be maintained in the pool.
- **Minimum Capacity**: The minimum number of commands that will be maintained in the pool.
- **Capacity Increment**: The number of commands that should be created in the pool each time the capacity of the pool is increased.
- **Max Wait Time Milliseconds**: The maximum amount of time in milliseconds that a thread will wait for a command from the pool. After waiting this amount of time, the thread makes a second attempt at retrieving a command from the pool.

Initialization Parameters: If the command was configured with any initialization parameters, they will be listed at the bottom of the page.

- **Command Parameter**: The name of the initialization command.
- **Parameter Value**: The value of the initialization command.

Forms

Use this page to view the command forms that are configured and active within the command engine.

See also

Commands
Pipelines
Job Monitor
Cache Stats
Profiling
Asset Loaders
Import/Export
Logging Settings

Home > Site Manager by the Section > System Tools > Pipelines

Pipelines

Use this page to view all of the pipeline sources that are configured and currently active. The number of objects within each pipeline pool is also displayed for each source.

To get more information on any pipeline:

1. Choose the pipeline you are interested in.
2. Select the "Pipeline Source Name" of the pipeline or select the "View Details" icon. Detailed information about the pipeline will be displayed when the page refreshes. See Details for a description of the information available.
3. To return to the list of pipelines, select "Back to Pipeline List".

Articles in this section

Details

See also

Commands
Forms
Job Monitor
Cache Stats
Profiling
Asset Loaders
Import/Export
Logging Settings

Home > Site Manager by the Section > System Tools > Pipelines > Details

Details

The Details page provides details on the pipeline, how it is configured, and how it is invoked.

Back to Pipeline List: Select this link to return the list of all of the pipelines defined for the site.

Source Name: The name of the source configuration file used for the pipeline.

JNDI Name: The name of the Java Naming and Directory Interface used for the pipeline.

Pool Statistics: This summary box contains information about the pipeline pool used for this pipeline. The pool is used to hold instances of the pipeline.

- **Current Pool Size**: The number of pipelines in the pool, plus the number of pipelines currently in use.
- **Highest Capacity**: The largest number of pipelines that were ever in the pool.
- **Current Waiters**: The current number of threads that are waiting to retrieve a pipeline from the pool.
- **Highest Waiters**: The largest number of threads that were ever waiting to retrieve a pipeline from the pool.
- **Highest Wait Milliseconds**: The longest amount of time in milliseconds that a thread had to wait to retrieve a pipeline from the pool.

Pool Configurations: This summary box contains the configuration information that was set for the pipeline pool.

- **Maximum Capacity**: The maximum number of pipelines that will be maintained in the pool.
- **Minimum Capacity**: The minimum number of pipelines that will be maintained in the pool.
- **Capacity Increment**: The number of pipelines that should be created in the pool each time the capacity of the pool is increased.
- **Max Wait Time Milliseconds**: The maximum amount of time in milliseconds that a thread will wait for a pipeline from the pool. After waiting this amount of time, the thread makes a second attempt at retrieving a pipeline from the pool.

Pipeline Parameters: This summary box lists the configuration parameters that were defined for the pipeline.

- **Pipeline Parameter**: This column contains the names of each pipeline parameter in the pipeline configuration.
- **Parameter Value**: This column contains the values of each pipeline parameter in the pipeline configuration.

Pipeline Stages:

- **Stage #**: There is one Stage section for each Stage defined in the pipeline. Each Stage section will contain a number which indicates which Stage it is. A Stage is a group of components that will be executed before the next stage begins execution. It is common for pipelines to contain only one stage.
- **Components**: Within each Stage section is a series of summary boxes, one for each component in the stage.
  - **Component**: The name of the component.
  - **Class Name**: The fully qualified Java class name of the class that implements the component.
  - **Initialization Parameters**: At the end of each component summary box is a series of rows. The rows contain information on the initialization parameters that are configured for the component.
    - **Initialization Parameter Name**: The first column in the row contains the name of each initialization parameter.
    - **Initialization Parameter Value**: The second column in the row contains the value of each initialization parameter.

Home > Site Manager by the Section > System Tools > Job Monitor

Job Monitor

Use this page to view all of the jobs currently configured and available in the monitoring system.

To view the details of any job:

1. Choose the job you are interested in.
2. Select the "Job Name" or the "View Details" icon. The job details will appear when the page refreshes. See *Details* for a description of the fields on that page.
3. To return to the list of jobs, select "Back to Job List".

To view the messages produced by any job:

1. Choose the job you are interested in.
2. Select the "Job Name" or the "View Details" icon. The job details will appear when the page refreshes.
3. If you wish to view the messages by date, select a start and end date. Select "Display Messages by Date".
4. If you wish to view the messages produced by the last run of the job, select "Display Last Run Messages".
5. To return to the list of jobs, select "Back to Job List".

Articles in this section

Details

See also

Commands
Forms
Pipelines
Cache Stats
Profiling
Asset Loaders
Import/Export
Logging Settings

Details

The Details page provides information on the job and the messages generated by it during execution.

Back to Job List: Select this link to return to the page listing all of the jobs.

Job Details: This summary box contains information on the status of the job.

- **Current Status**: The current status of the job. Status may be one of the following: Activated, Running, Completed, Completed with Warnings, Failed, or Cancelled.
- **Last Updated**: The last time the job status was updated.
- **Job Name**: The name of the job.
- **Job Description**: The description of the job.

View Messages by Date Range: This summary box allows you to select parameters that will be used to select messages generated by the job during execution.

- **Message Start Date**: The start date to use to select messages. Enter the date in the entry field or use the calendar control to select the date. This field does not need to be set if only displaying the messages from the last execution of the job.
- **Message End Date**: The end date to use to select messages. Enter the date in the entry field or use the calendar control to select the date. This field does not need to be set if only displaying the messages from the last execution of the job.
- **Display Messages by Date**: Select this button to display all the message generated by the job between the specified start date and the specified end date.
- **Display Last Run Messages**: Select this button to display all the messages generated the last time the job executed.

Display Previous Run Messages: This button is available only when "Display Last Run Messages" has been selected. Selecting this button will display the messages generated by the job during the execution previous to the one currently displayed.

Job Messages: This list box contains all of the job messages generated by the job according to the selections made in the "View Messages by Date Range" summary box.

- **Entry Date**: The date the message was generated.
- **Message Type**: The type of the message. The type may be one of the following: Debug, Error, Info, Status Activated, Status Cancelled, Status Completed, Status Completed with Warnings, Status Failed, Status Running, System Info, or Warning.
- **Message Text**: The text of the message.

Home > Site Manager by the Section > System Tools > Cache Stats

Cache Stats

Use this page to view the overall statistics of the caching engine, along with the statistics associated with each individual cache record. If you have the appropriate privileges you will also be able to clear and/or disable the cache.

To view the records associated with each individual cache:

1. Select "Show Records".
2. Select "Hide Cache Records" to hide the records.

To show aggregates for the cache:

1. Select "Show Cache Aggregates".
2. To flush a cache key, select the key and then select "Flush Cache Keys".
3. Select "Hide Cache Aggregates" to hide the aggregates.

To clear the cache:

1. Select "Clear Cache".

To disable the cache:

1. If your site is a multi-site implementation, select the site to clear the cache for.
2. If your site is an international site, select the country to clear the cache for.
3. If your site is an international site, select the language to clear the cache for.
4. Select "Disable Cache".

To enable the cache:

1. Select "Enable Cache."

See also

Commands
Forms
Pipelines
Job Monitor
Profiling
Asset Loaders
Import/Export
Logging Settings

Profiling

Use this page to manage the system's profiling engine and view the information produced by it. The profiling engine tracks important performance statistics such as executions/second, min/max/average time in any code section, and the number of application server threads active in an area of the application at any given point in time.

To select routines to be profiled:

1. Choose the routines to be profiled from the list on the page.
2. For each routine to be profiled, check the box to the far right of the routine.

To start the profiling engine:

1. Select "Enable Profiling Engine". Statistics will be gathered for all routines that have been selected to be profiled.

To view the profiling statistics for profiled routines:

1. Select the 'plus' sign to the left of the routine you want to view. The routine will expand and the statistics will be displayed beneath it.
2. Select the 'minus' sign to the left of the routine to collapse the statistics area.

To set a filter for profiling:

1. Enable the profiling engine.
2. Enter the name of a profiling group in the "Filter:" text box.
3. Select "Enable".
4. The profiling group will be enabled and profiling information will be logged for it.

To clear a filter:

1. Enter the name of a profiling group you want to disable in the "Filter:" text box.
2. Select "Disable".
3. The profiling group will be disable and profiling information will no longer be logged for it.

To clear the profiling statistics:

1. Select "Reset Counters". The page will redraw and the statistics for each profiled routine will be reset to zero.

To disable the profiling engine:

1. Select "Disable Profiling Engine".

See also

Commands
Forms
Pipelines
Job Monitor
Cache Stats
Asset Loaders
Import/Export
Logging Settings

Home > Site Manager by the Section > System Tools > Asset Loaders

Asset Loaders

Use this page to view the asset loader pools that are configured and active within the CMS engine. You may also view the number of objects within each pool for each loader type.

See also

Commands
Forms
Pipelines
Job Monitor
Cache Stats
Profiling
Import/Export
Logging Settings

Home > Site Manager by the Section > System Tools > Import/Export

Import/Export

Use this page to perform bulk imports or exports for the site. Each report has an online help page that describes the fields in the report.

To perform an import:

1. Select "Import" as the action.
2. Select a dataset.
3. Select a filename.
4. Select a worksheet.
5. Select the "Import" button.

To perform an export:

1. Select "Export" as the action.
2. Select a dataset.
3. Select the "Export" button.

Action: Select "Import" from this drop-down list box if you are importing a file. Select "Export" if you are exporting a file.

Site: Select the site that you are importing or exporting information to.

Dataset: Select the type of information you are importing or exporting.

Filename: This field is available only when importing information. Select the file you are importing, or use the "Upload File" fields to upload a file. Only files with the .csv extension can be imported.

Worksheet: This field is available only when importing. Select the worksheet of the file that you are importing that you wish to import.

Import: Select this button to begin the import. This buton is available only when an import is being performed.

Export: Select this button to begin the export. This button is available only when an export is being performed.

Upload File: The Upload File portion of the page is available only when doing an import and only after the site and dataset have been selected. This area is used to select a local data file for importing instead of a data file on the server.

- **Browse**: Select this button to choose a local file to import. A pop-up window will appear which will let you select the file. Once the file is selected, it will be uploaded and will become available in the "Filename" drop-down list box.

Articles in this section

See also

Commands
Forms
Pipelines
Job Monitor
Cache Stats
Profiling
Asset Loaders

Logging Settings

Category Metadata File Format

Field	Data Type	Notes	Cannot be Null
Category Identifier	long	Used as primary key	
Category Name	string	255 characters maximum.	X
Category Keyword	string		
Meta Keywords	string		
Meta Description	string		
Category Description	string		
Sitemaps Priority	string	Valid priority values are 0.1 to 1.0, in 0.1 increments.	
Sitemaps Change Frequency	string	Valid values are "Always", "Daily", "Weekly", "Monthly", and "Yearly".	
Url Name Override	string		
Page Title Override	string		
Exclude from XML Sitemap Flag	string	Value should be either "Y" or "N".	
Updated Date	datetime	Defaults to the current date.	X

See also

Category To Product File Format
Content Metadata File Format
Product Metadata File Format
Product Variant Prices File Format
Product Variants File Format
Products File Format
Store Notifications File Format
Stores File Format

Home > Site Manager by the Section > System Tools > Import/Export > Category To Product File Format

Category To Product File Format

Field	Data Type	Notes	Cannot be Null	Value required	Values Will be Ignored
Category Identifier	integer	Used as the primary key in the database	X	X	
Product Identifier	integer	Used as the primary key in the database.	X	X	
Category Name	string				X
Product Name	string				X
Product Style	string				X
Sequence Number	integer	The order of the product in relation to the other products in the category. Defaults to 1	X	X	
Active Flag	String	1 character maximum. Value should be either "Y" or "N", "Y" is the default.			
Updated Date	datetime	Defaults to the current date.	X		

See also

Category Metadata File Format
Content Metadata File Format
Product Metadata File Format
Product Variant Prices File Format
Product Variants File Format
Products File Format
Store Notifications File Format
Stores File Format

Home > Site Manager by the Section > System Tools > Import/Export > Content Metadata File Format

Content Metadata File Format

Field	Data Type	Notes	Cannot be Null
Page Identifier	long	Used as the primary key in the database.	
Page Name	string	255 characters maximum.	X
Page Keywords	string		
Meta Keywords	string		
Meta Description	string		
Sitemaps Priority	string	Valid priority values are 0.1 to 1.0, in 0.1 increments.	
Sitemaps Change Frequency	string	Valid values are "Always", "Daily", "Weekly", "Monthly", and "Yearly".	
Exclude from Sitemaps Flag	string	Value should be either "Y" or "N".	
Updated Date	datetime	Defaults to the current date.	

See also

Category Metadata File Format
Category To Product File Format
Product Metadata File Format
Product Variant Prices File Format
Product Variants File Format
Products File Format
Store Notifications File Format
Stores File Format

Home > Site Manager by the Section > System Tools > Import/Export > Product Metadata File Format

Product Metadata File Format

Field	Data Type	Notes	Cannot be Null
Product Identifier	long	Used as a primary key in the database table.	
Product Name	string	255 characters maximum.	X
Product Keyword	string		
Meta Keywords	string		
Meta Description	string		
Product Description	string		
Sitemaps Priority	string	Valid priority values are 0.1 to 1.0, in 0.1 increments.	
Sitemaps Change Frequency	String	Valid values are “Always”, “Daily”, “Weekly”, “Monthly”, and “Yearly”.	
Url Name Override	string		
Page Title Override	string		
Exclude from XML Sitemaps Flag	string	Value should be either “Y” or “N”.	
Updated Date	datetime	Defaults to the current date.	X

See also

Category Metadata File Format
Category To Product File Format
Content Metadata File Format
Product Variant Prices File Format
Product Variants File Format
Products File Format
Store Notifications File Format
Stores File Format

Product Variant Prices File Format

Field	Data Type	Notes	Value Required	Cannot be Null	Can Override Existing Data	Values Will be Ignored
Product Variant Price Identifier	integer	Used as primary key.	X	X		
SKU	string	SKU provides a reference that can be used to obtain a PRODUCT_VARIANT_ID.	X			
Product Variant Identifier	integer	Will be used as a foreign key.	X	X		
Quantity	integer	defaults to 1	X	X		
Source Identifier	integer	defaults to 1	X	X		
Price	double		X	X	Y	
Start Date	datetime				Y	
End Date	datetime				Y	
Updated Date	datetime	Defaults to the current date.	X	X		
Active Flag	string	Value should be either "Y" or "N".		X	Y	
Source Name	string					X
Source Code	string					X
Product Identifier	integer					X
Product Name	string					X
Style	string					X
Color Name	string					X
Size Name	string					X
Site Name	string					X
Workflow Flag	string	Value should be either "Y" or "N", defaults to "N". 1 character maximum.	X	X		
Original Price	double				Y	

See also

Category Metadata File Format
Category To Product File Format
Content Metadata File Format
Product Metadata File Format
Product Variants File Format
Products File Format
Store Notifications File Format
Stores File Format

Product Variants File Format

Field	Data Type	Notes	Value Required	Cannot be Null
Product Variant Identifier	integer	Will be used as a primary key.		
Style	string	This provides a reference that can be used to obtain the product ID. 100 characters maximum.	X	X
Product Identifier	integer	Will be used as a foreign key.		
SKU	string	255 characters maximum.	X	X
Color Name	string	255 characters maximum.		
Size Name	string	255 characters maximum.		
Sequence Number	integer	defaults to 0	X	X
Updated Date	datetime	Defaults to the current date.		X
Back-orderable Flag	string	Value should be either "Y" or "N", defaults to "Y", 1 character maximum.		
Back-order Date	datetime			
UPC	string	14 characters maximum.		
Inventory Level	integer			
Color Code	string	255 characters maximum.		
Size Code	string	255 characters maximum.		
Taxable Flag	string	Value should be either "Y" or "N", defaults to "N". 1 character maximum.	X	X
Variant Promo Group Code	string	255 characters maximum.		
Pricing Group Code	string	255 characters maximum.		
Start Date	datetime			
End Date	datetime			
Active Flag	string	Value should be either "Y" or "N", defaults to "N". 1 character maximum.	X	X
Workflow Flag	string	Value should be either "Y" or "N", defaults to "N". 1 character maximum.		X
Never Out Of Stock Flag	string	Value should be either "Y" or "N", defaults to "N". 1 character maximum.		X
Pre-orderable Flag	string	Value should be either "Y" or "N", defaults to "N". 1 character maximum.		X
Pre-order Date	datetime			
Original Price	double			
Store Pickup Available Flag	string	Value should be either "Y" or "N", defaults to "N". 1 character maximum.		X
In-store Inventory Level	integer			

See also

Category Metadata File Format
Category To Product File Format
Content Metadata File Format

Product Metadata File Format
Product Variant Prices File Format
Products File Format
Store Notifications File Format
Stores File Format

Home > Site Manager by the Section > System Tools > Import/Export > Products File Format

Products File Format

Field	Data Type	Notes	Value Required	Cannot be Null	Values Will be Ignored
Product identifier	integer	Will be used as a primary key.	X	X	
Product Type Identifier	integer				
Product Style	string	100 characters maximum.	X	X	
Product Name	string	150 characters maximum.	X	X	
Product Attribute Group Identifier	integer				
Product Description	string				
Updated Date	datetime	Defaults to the current date.		X	
Created Date	date	Defaults to the current date.		X	
Active Flag	string	Value should be either “Y” or “N”, defaults to “N”. 1 character maximum.		X	
Image Filename	string				
Full Path of Image File	string				X
Promo Group Code	string	255 characters maximum.			
Start Date	date				
End Date	date				
Url Name Override	string				
Page Title Override	string				
Meta Description	string				
Meta Keywords	string				
Product Keyword	string				
Site Identifier	integer		X		
First Alternate Image Filename	string				
Second Alternate Image Filename	string				
Third Alternate Image Filename	string				
Fourth Alternate Image Filename	string				
Fifth Alternate Image Filename	string				
Sixth Alternate Image Filename	string				

See also

Category Metadata File Format
Category To Product File Format
Content Metadata File Format
Product Metadata File Format

Product Variant Prices File Format
Product Variants File Format
Store Notifications File Format
Stores File Format

Home > Site Manager by the Section > System Tools > Import/Export > Store Notifications File Format

Store Notifications File Format

Field	Data Type	Notes	Value Required	Cannot be Null	Can Override Existing Data
Store Notification Identifier	integer	Will be used as a primary key.	Y	X	
Store Identifiers	string				
Notification Title	string	255 characters maximum.	Y		
Notification Description	string				
Coupon Code	string				
Coupon Code Type	string				
Sequence Number	integer		N		
Updated Date	datetime	Defaults to the current date.		X	
Start Date	date				
End Date	date				
Active Flag	string	Value should be either "Y" or "N", defaults to "N". 1 character maximum.		X	X
In-app Notification Flag	string	Value should be either "Y" or "N".			
Applied To	string				
Send Notice of Expiration Flag	string	Value should be either "Y" or "N", defaults to "N". 1 character maximum.		X	X
Number of Days Prior to Expiration to Send Notice	integer				
More Information	string				
Terms and Conditions	string				

See also

Category Metadata File Format
Category To Product File Format
Content Metadata File Format
Product Metadata File Format
Product Variant Prices File Format
Product Variants File Format
Products File Format
Stores File Format

Home > Site Manager by the Section > System Tools > Import/Export > Stores File Format

Stores File Format

Field	Data Type	Notes	Value Required	Cannot be Null
Store Identifier	integer	Will be used as a primary key.	X	X
Store Name	string	255 characters maximum.	X	
First Address Line	string	255 characters maximum.	X	
Second Address Line	string	255 characters maximum.	X	
City	string	500 characters maximum.	X	
State	string	50 characters maximum.	X	
Zip Code	string	10 characters maximum.	X	
Phone	string	20 characters maximum.	X	
Country Code	string	4 characters maximum.	X	
Latitude	string	255 characters maximum.	X	
Longitude	string	255 characters maximum.	X	
Store Number	string	100 characters maximum.	X	
Hours	string		X	
Updated Date	datetime	Defaults to the current date.		X
Active Flag	string	Value should be either "Y" or "N", defaults to "N". 1 character maximum.		X
Site Identifier	integer		X	
External Store Code	string	55 characters maximum.	X	
Store Type Identifier	integer		X	
Store Pickup Availability Flag	string	Value should be either "Y" or "N". 1 character maximum.	X	
Title	string			
Image File	string	255 characters maximum.	X	
Image File Alternate Text	string	255 characters maximum.	X	
Meta Keywords	string			
Meta Description	string			
Sitemaps Priority	string	Valid values are 0.1 to 1.0, in 0.1 increments.		
Sitemaps Change Frequency	string	Valid values are "Always", "Daily", "Weekly", "Monthly", and "Yearly".		
Meta Keywords	string			
Exclude from XML Sitemaps Flag	string	Value should be either "Y" or "N". 1 character maximum.		
Notification Start Date	date			
Notification End Date	date			
Notification Radius	integer			
Special Hours Notification	string			

Field	Data Type	Notes	Value Required	Cannot be Null
Notification Display Start Date	date			
Notification Display End Date	date			
Special Hours	string			

See also

Category Metadata File Format
Category To Product File Format
Content Metadata File Format
Product Metadata File Format
Product Variant Prices File Format
Product Variants File Format
Products File Format
Store Notifications File Format

Logging Settings

Use this page to change the settings for the logging information that is generated. Modifications made on this page will remain in effect until the website is restarted, at which time the settings will revert back to those set in the configuration files for the site. Logging options are grouped according to the type of information they log. Each group is represented by a separate tab in the right-hand work pane. Within each tab is the list of logging options for that group, as well as whether or not logging information is being generated for each option.
To locate a logging option:

1. Select the tab in the right-hand work pane that corresponds to the type of information the logging option controls.
2. Locate the option in the list of options that appear on the tab.

To activate a logging option:

1. Follow the instructions above to locate the option you are interested in.
2. Select the value in the "Active" column for the logging option. The value will change from "false" to "true" and information for the option will begin to be logged.

To deactivate a logging option:

1. Follow the instructions above to locate the option you are interested in.
2. Select the value in the "Active" column for the logging option. The value will change from "true" to "false" and information for the option will no longer be logged.

See also

Commands
Forms
Pipelines
Job Monitor
Cache Stats
Profiling
Asset Loaders
Import/Export

Tutorials

This section contains step-by-step instructions on how to accomplish common tasks within the Site Manager.

Articles in this section

- Adding Products To Categories
- Adding Synonyms to the Thesaurus
- Creating an Experience for a Promotion
- Creating an Experience for an A/B Test
- Creating Dynamic Attributes
- Creating New Products
- Modifying Content
- Working With Stores

See also

Oracle Legal Notices
Welcome
Getting Started
Site Manager by the Section

Adding Products To Categories

This tutorial describes how to add products to a category in the product catalog. If you have added a new product to the web site, you should add the product to a category so that it will be displayed when visitors are browsing categories. You can also use the instructions in this tutorial to add ensembles to a category and to reorder the appearance order of both products and ensembles in a category.

Conventions Used in this Tutorial

SMALL CAPS: Items that appear in small caps refer to text items on the application. If you are viewing the application, you should see a label, menu, or button with the same text on it.

⇒: Arrows appear at the beginning of areas that contain a task you should perform. When you see the arrow, you should perform the described task.

: Pink outline boxes are used to highlight areas of screenshots that are being referred to in the text. These are used to call attention to a particular area of the screen, but you will not see those boxes on your screen when you are using the application.

Articles in this section

See also

Adding Synonyms to the Thesaurus
Creating an Experience for a Promotion
Creating an Experience for an A/B Test
Creating Dynamic Attributes
Creating New Products
Modifying Content
Working With Stores

Before You Begin

Products are added to categories using the Site Manager. Before you begin assigning products to categories, you should:

- Know how to access the Site Manager;
- Have a valid Site Manager log in that has been granted the categories.edit.product_ensemble privilege;
- Know how to navigate the Site Manager and find various sections in it;
- Be logged in to the Site Manager;
- Know the product(s) you are adding;
- Know the date(s) the product(s) will become active, if they are not currently active;
- Know the category you are adding the product(s) to.

See also

The Example Used
Optional - View the Category Before Adding the Product
Locating the Category
Changing Catalogs
Adding the Product
Optional - Viewing the Category After Addition
Modifying the Order of Products in a Category
Optional - Viewing the Category After Reordering

The Example Used

In this tutorial we will be adding a product that is already part of the product catalog to a category. We also want the product to be the second product displayed when the category is being browsed, so it may be necessary to reorder the product listing for the category after the product has been added.

See also

Before You Begin
Optional - View the Category Before Adding the Product
Locating the Category
Changing Catalogs
Adding the Product
Optional - Viewing the Category After Addition
Modifying the Order of Products in a Category
Optional - Viewing the Category After Reordering

Home > Tutorials > Adding Products To Categories > Optional - View the Category Before Adding the Product

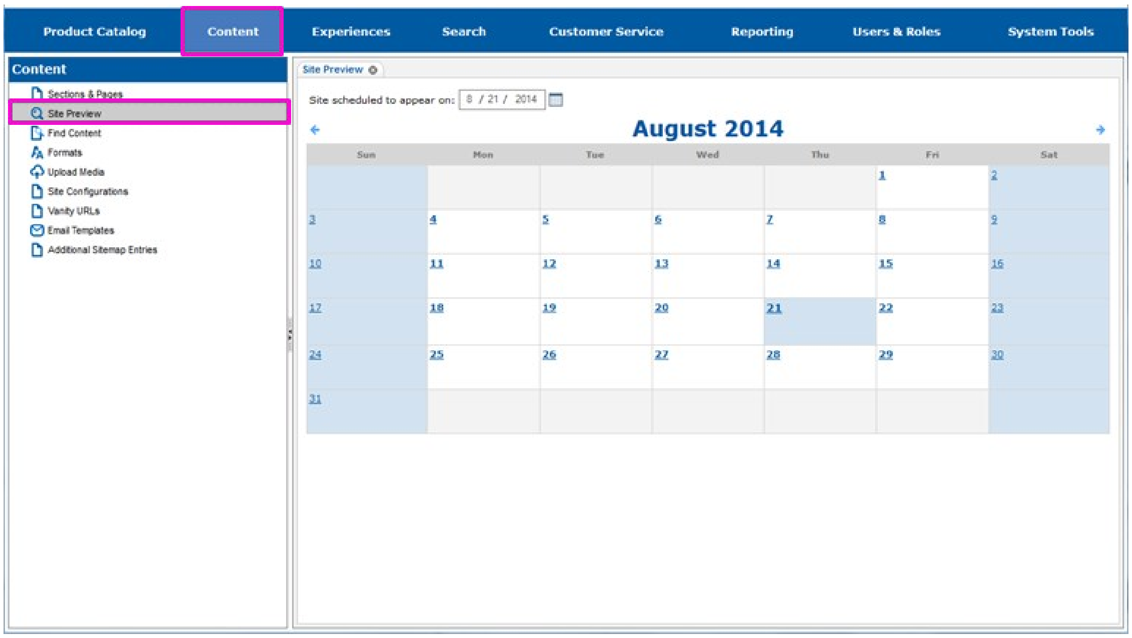
Optional - View the Category Before Adding the Product

You can view the contents of the category you are adding the product to with the Site Preview portion of the Site Manager. Site Preview allows you to view the website and see how it will appear on any selected date in the future or the past. We will be using the Site Preview functionality in this tutorial because many products are scheduled for future release when they are added to a website, and site preview will allow us to view into the future. If your product(s) are currently active, you may also view the category by navigating to the category on the website. We will use a sample website throughout this tutorial - your website will appear different than our sample.

The site preview functionality is in the CONTENT portion of the Site Manager.

⇒ In the Site Manager, select CONTENT.

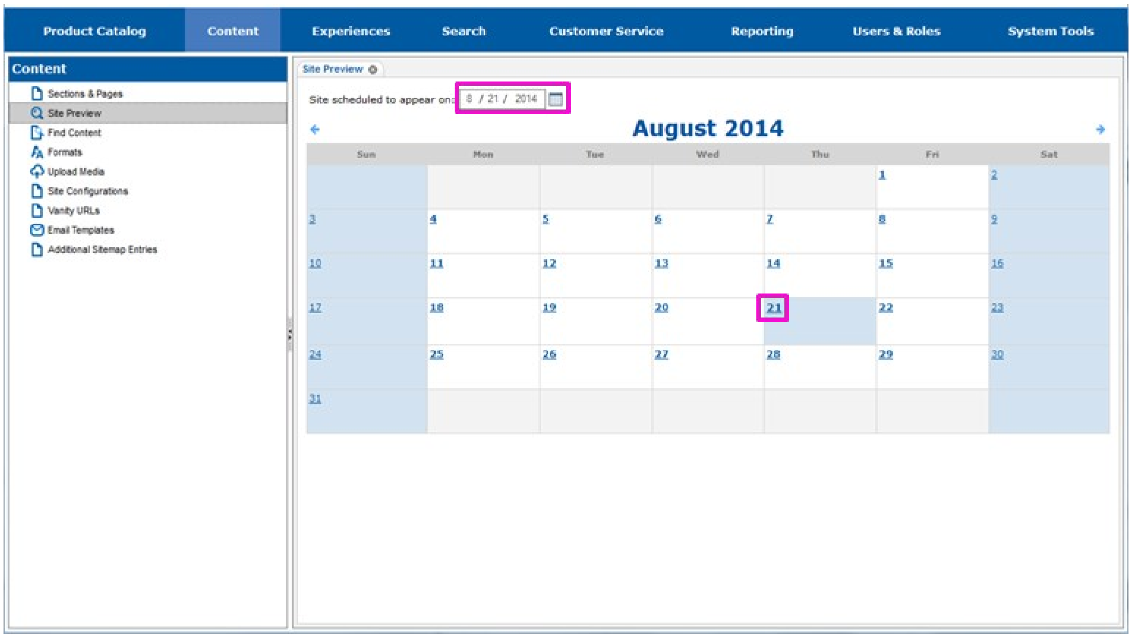
⇒ Select SITE PREVIEW from the left-hand pane.



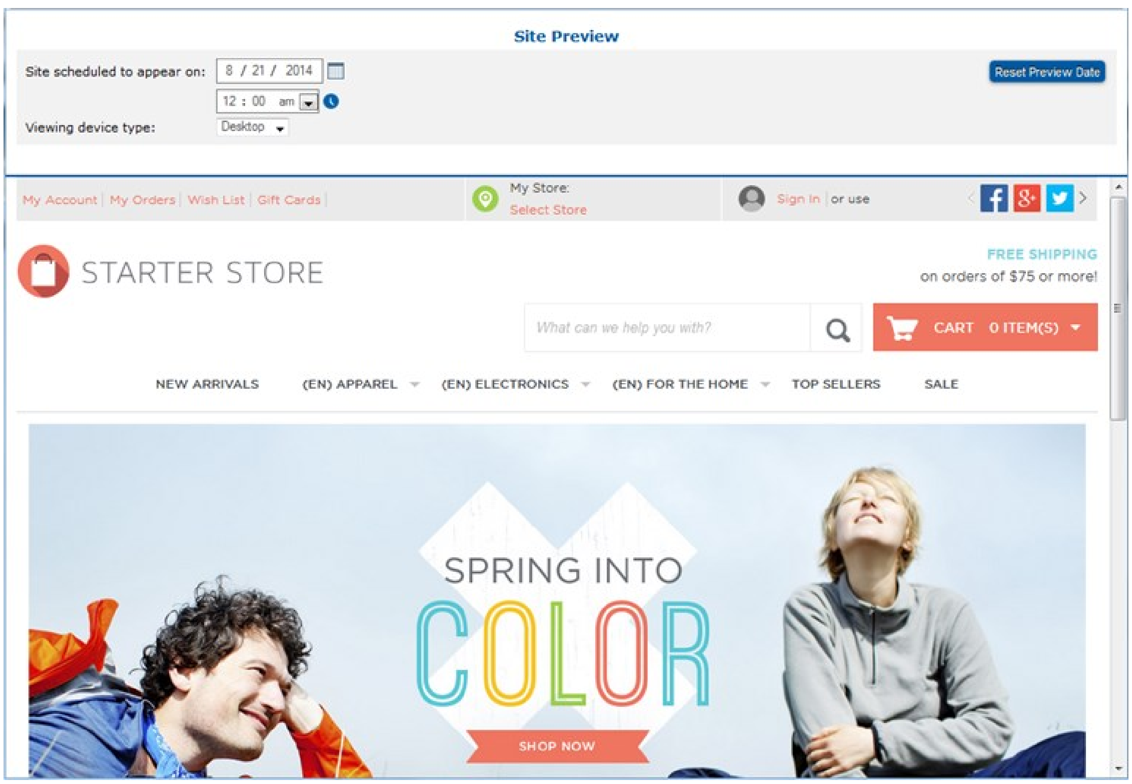
You will see a calendar of the current month and year.

⇒ If your product becomes active on a date in different month, select the calendar icon at the top of the page to move to the correct month.

⇒ Select the date in the month that the product becomes active on.

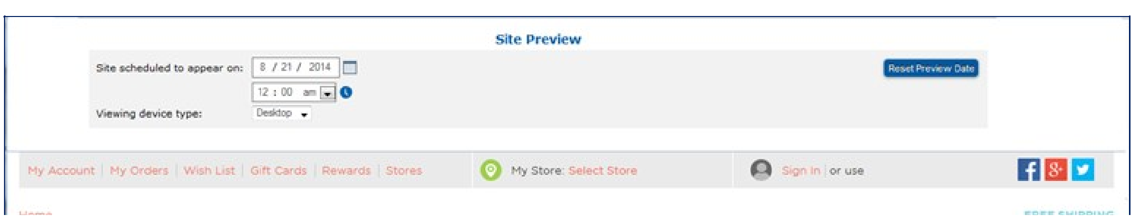


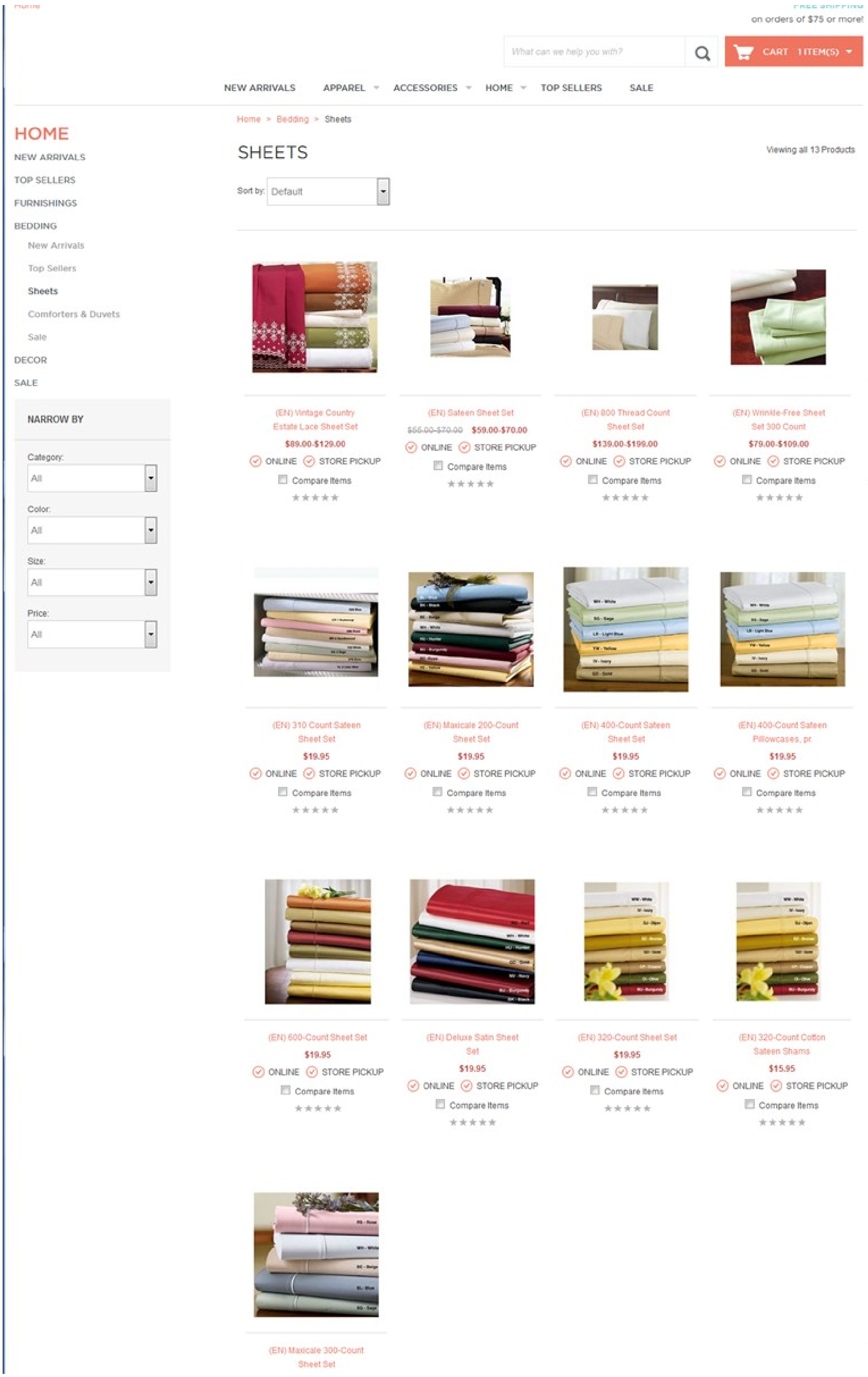
A new window will appear that contains a preview of the home page as it is currently scheduled to look on the date you selected.



⇨ Navigate to the category you will be adding the product to.

You will not see the product in the category.




on orders of $75 or more!
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ACCESSORIES
HOME
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SALE
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HOME
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TOP SELLERS
FURNISHINGS
BEDDING
New Arrivals
Top Sellers
Sheets
Comforters & Duvets
Sale
DECOR
SALE
NARROW BY
Category:
All
Color:
All
Size:
All
Price:
All
SHEETS
Viewing all 13 Products
Sort by: Default
(EN) Vintage Country Estate Lace Sheet Set
$89.00-$129.00
ONLINE STORE PICKUP
Compare Items
(EN) Sateen Sheet Set
$55.00-$70.00 $59.00-$70.00
ONLINE STORE PICKUP
Compare Items
(EN) 800 Thread Count Sheet Set
$139.00-$199.00
ONLINE STORE PICKUP
Compare Items
(EN) Wrinkle-Free Sheet Set 300 Count
$79.00-$109.00
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Compare Items
(EN) 310 Count Sateen Sheet Set
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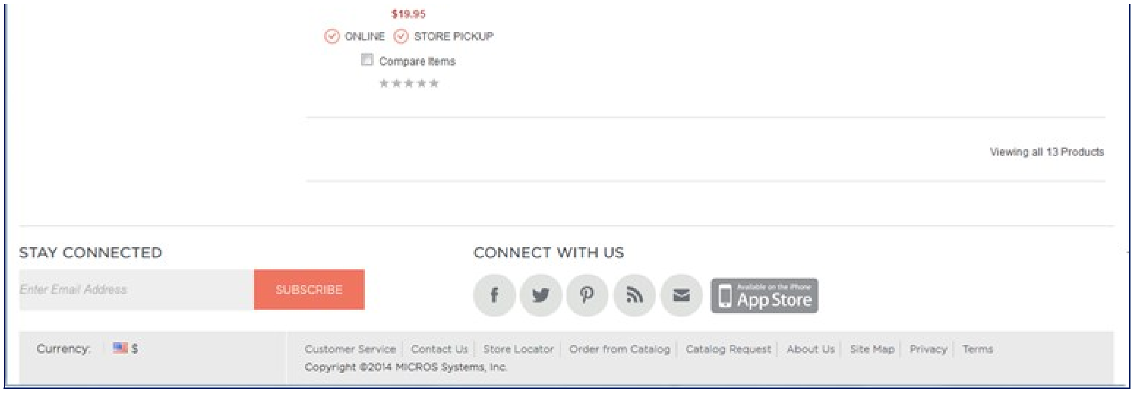
ONLINE STORE PICKUP
Compare Items
(EN) Maxicale 200-Count Sheet Set
$19.95
ONLINE STORE PICKUP
Compare Items
(EN) 400-Count Sateen Sheet Set
$19.95
ONLINE STORE PICKUP
Compare Items
(EN) 400-Count Sateen Pillowcases, pr.
$19.95
ONLINE STORE PICKUP
Compare Items
(EN) 600-Count Sheet Set
$19.95
ONLINE STORE PICKUP
Compare Items
(EN) Deluxe Satin Sheet Set
$19.95
ONLINE STORE PICKUP
Compare Items
(EN) 320-Count Sheet Set
$19.95
ONLINE STORE PICKUP
Compare Items
(EN) 320-Count Cotton Sateen Shams
$15.95
ONLINE STORE PICKUP
Compare Items
(EN) Maxicale 300-Count Sheet Set



See also

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Locating the Category
Changing Catalogs
Adding the Product
Optional - Viewing the Category After Addition
Modifying the Order of Products in a Category
Optional - Viewing the Category After Reordering

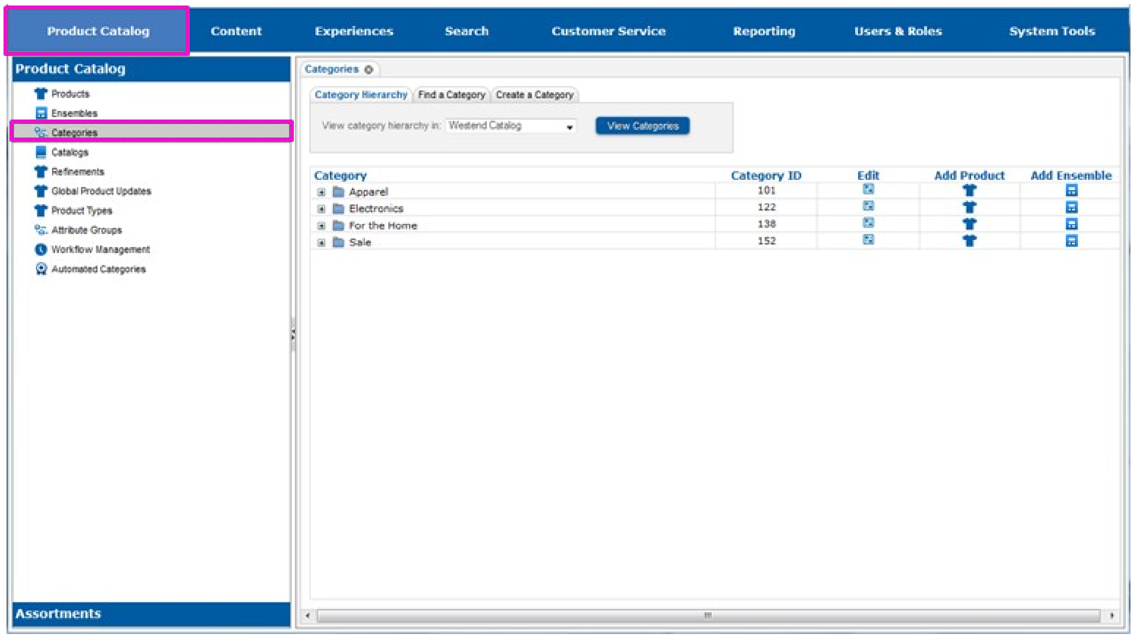
Home > Tutorials > Adding Products To Categories > Locating the Category

Locating the Category

Products are added to categories through the PRODUCT CATALOG portion of the Site Manager.

⇒ In the Site Manager, select PRODUCT CATALOG.

⇒ Select CATEGORIES from the left-hand pane.



The categories that will be displayed belong to the catalog that is currently configured as the default catalog. If you want to add the product(s) to a category that belongs to a different catalog, you will need to change to that catalog. Follow the steps in section ***Changing Catalogs*** to change to a different catalog. Proceed to section ***Adding the Product*** if you do not need to change catalogs.

See also

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Changing Catalogs
Adding the Product
Optional - Viewing the Category After Addition
Modifying the Order of Products in a Category
Optional - Viewing the Category After Reordering

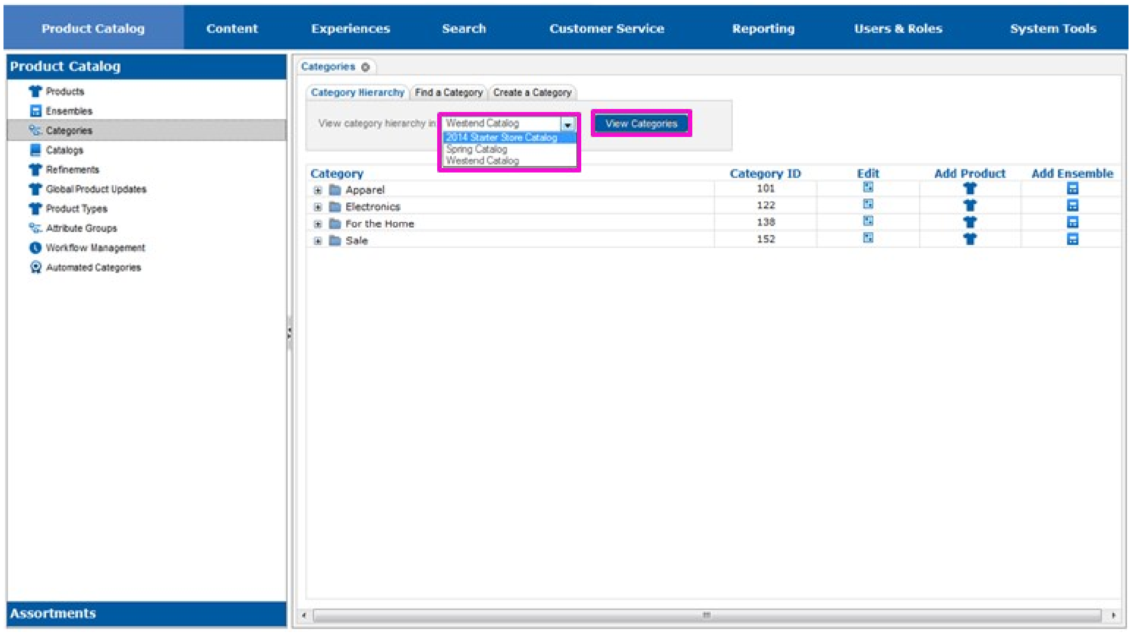
Home > Tutorials > Adding Products To Categories > Changing Catalogs

Changing Catalogs

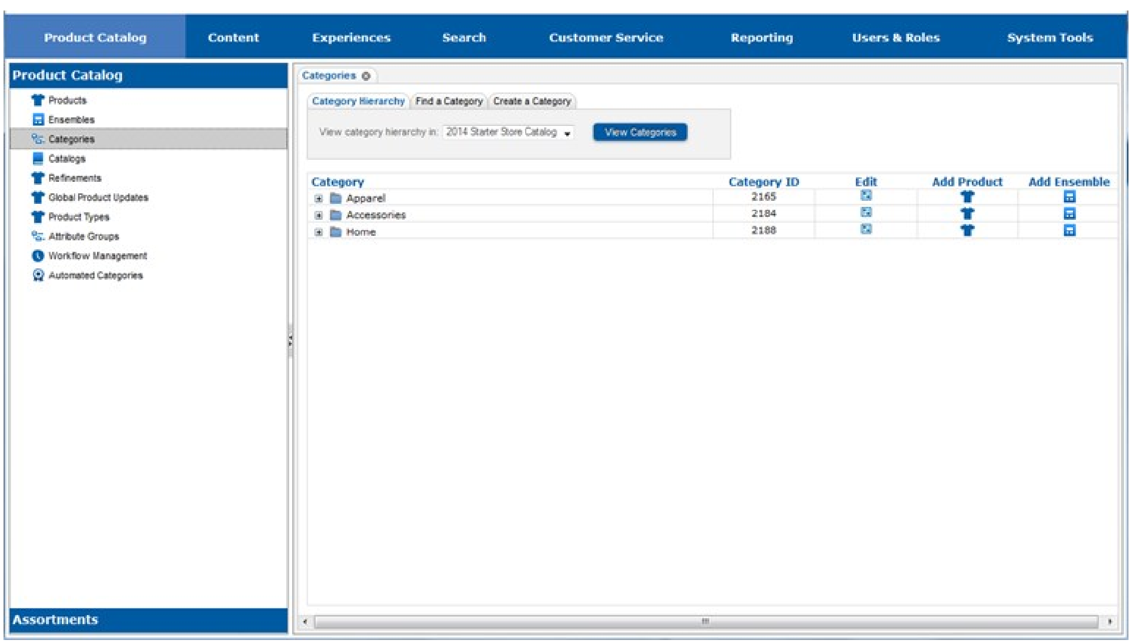
⇒ Select the drop-down button for the VIEW CATEGORY HIERARCHY drop-down.

⇒ Select the catalog you want to use.

⇒ Select VIEW CATEGORIES.



The page will redraw and you will see the categories from the new catalog you chose.



See also

Before You Begin
The Example Used
Optional - View the Category Before Adding the Product
Locating the Category

Home > Tutorials > Adding Products To Categories > Adding the Product

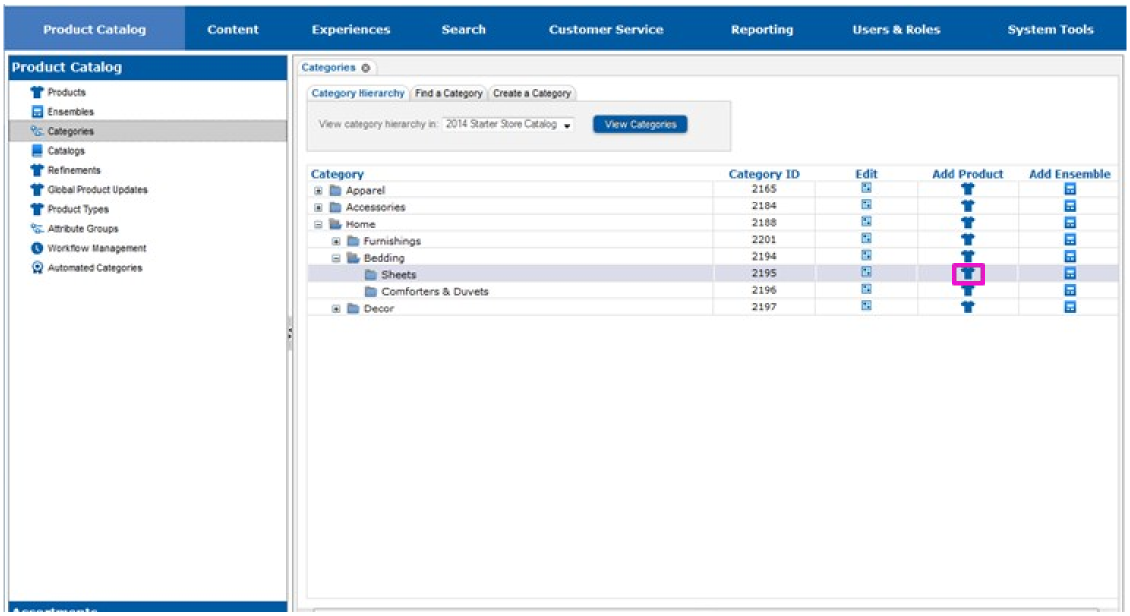
Adding the Product

If the category you want to add the product to is not visible, you can expand the category hierarchy until it is.

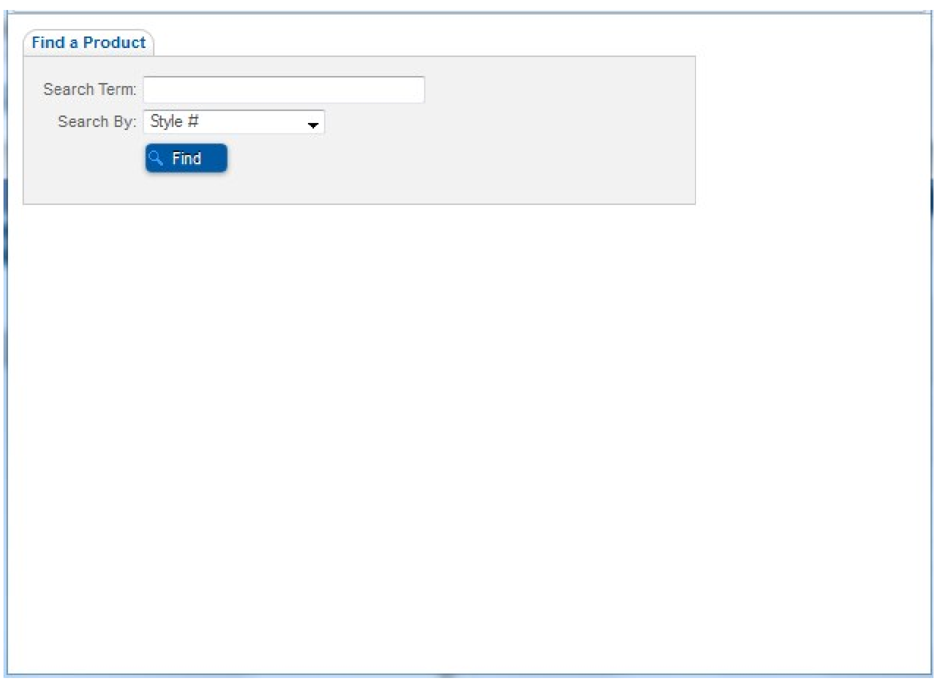
⇨ Select the '+' to the left of a category to expand it. Continue to drill down into the hierarchy by selecting the '+' at the left of each category until you see the category you are going to place the product in.

Products can be added to the category by editing the category or selecting the ADD PRODUCT or ADD ENSEMBLE icon. We will be adding the product by selecting the ADD PRODUCT icon.

⇨ Select the ADD PRODUCT icon that is to the right of the category the product will be added to.



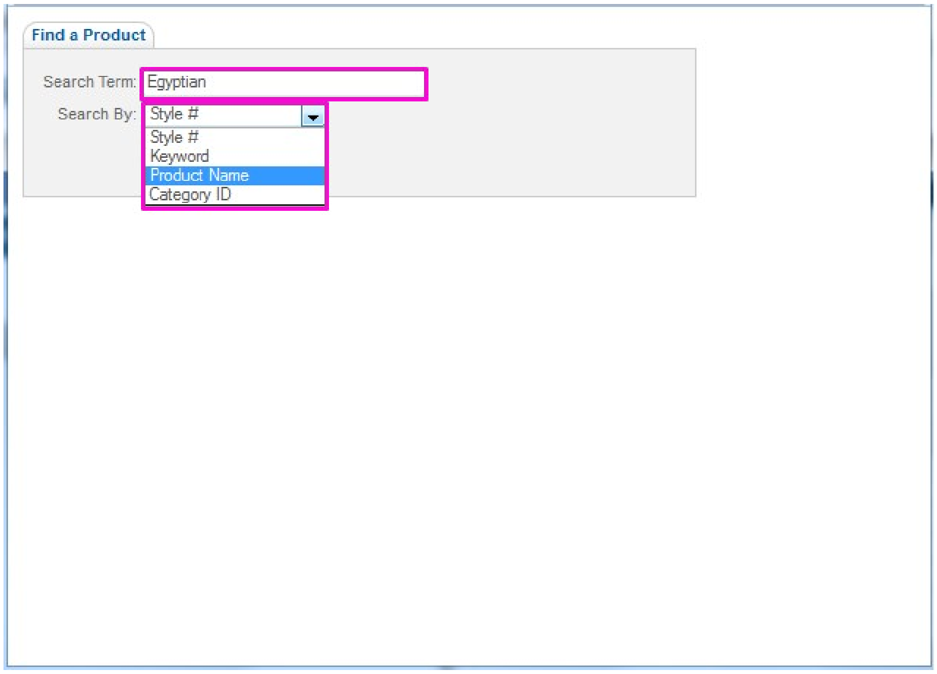
A new window will pop up. This window is the product selection window. This window allows you to locate products in the database and when you select them, automatically add them to the category.



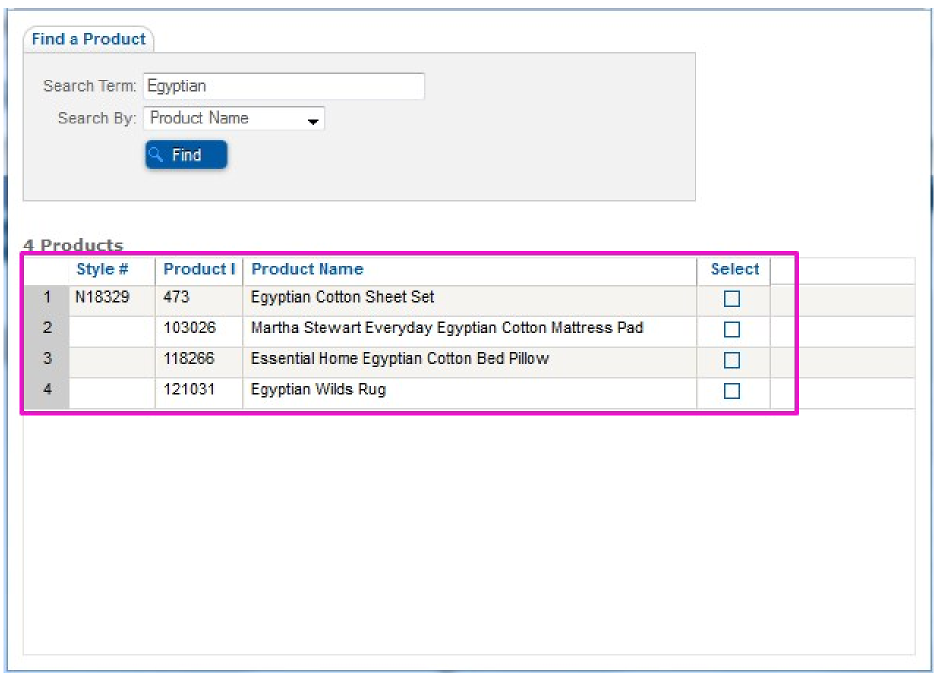
⇒ Enter your search information in the text box.

⇒ In the SEARCH BY drop-down list box, select STYLE #, KEYWORD, PRODUCT NAME, or CATEGORY ID to indicate how the search should be performed.

⇒ Select FIND.



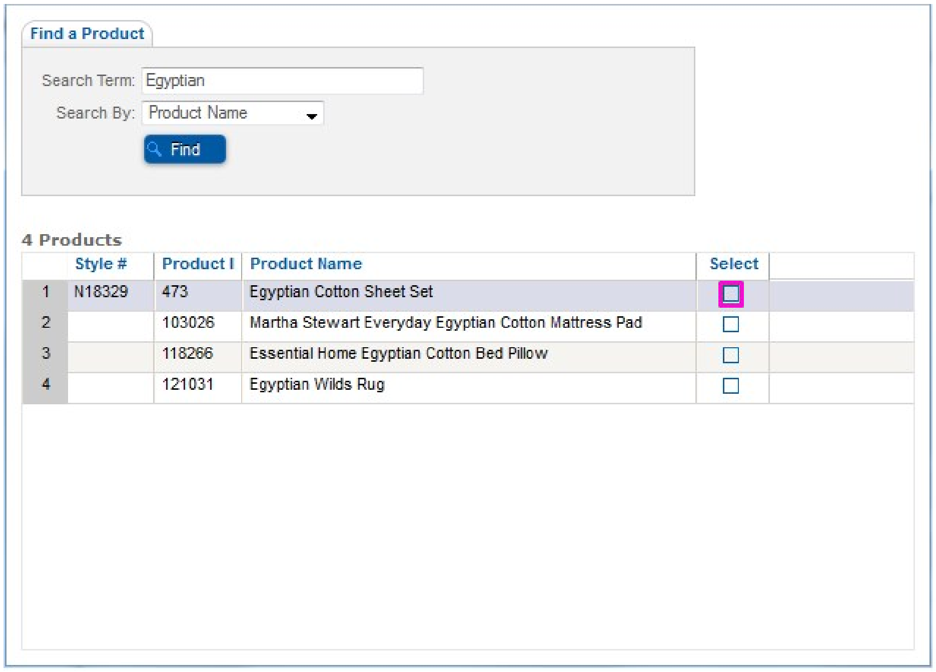
A list of products that match your search criteria will be displayed in the window. Each product will have a selection box to the right of it.



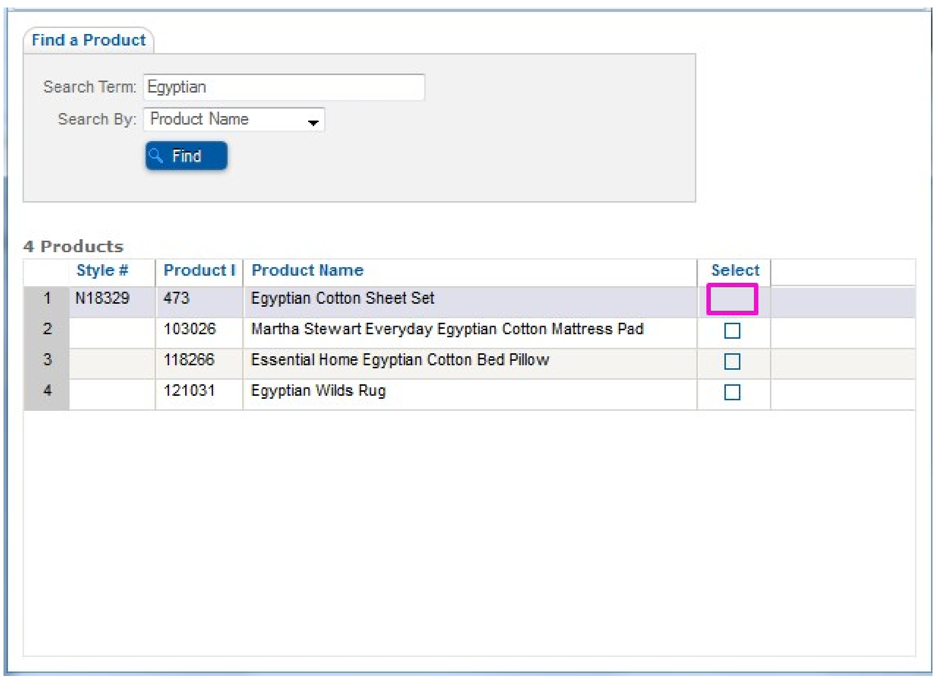
Selecting the SELECT box will automatically add that product to the category.

⇒ Locate in the list the product you are adding.

⇒ Select the SELECT box to the right of the product.

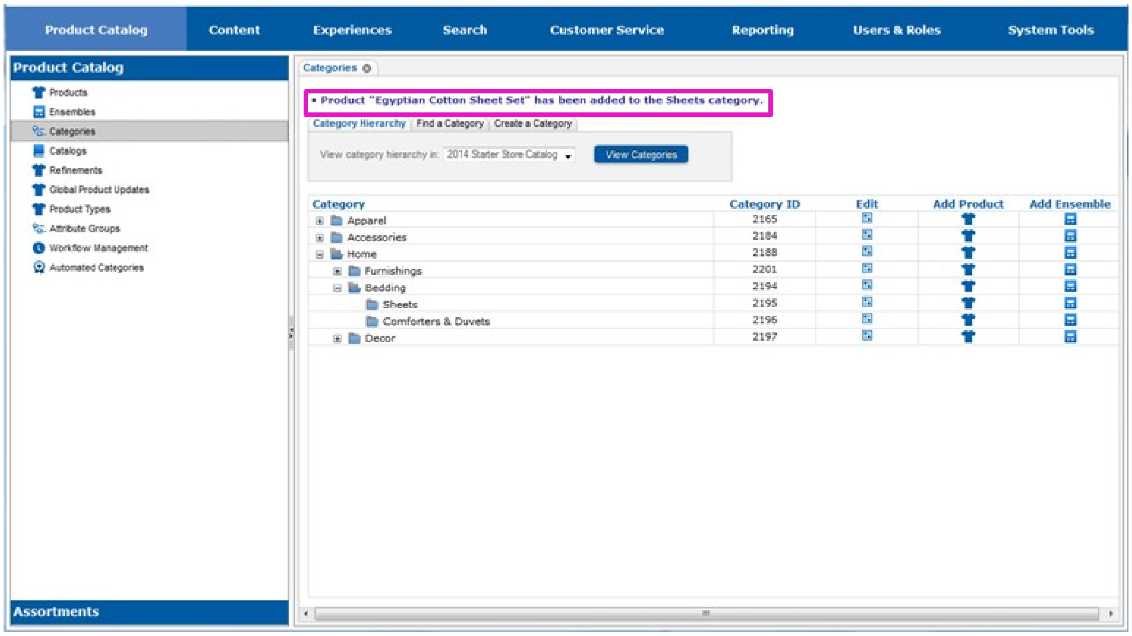


Your product will be added to the category and you will see that the select icon for the product has been removed.



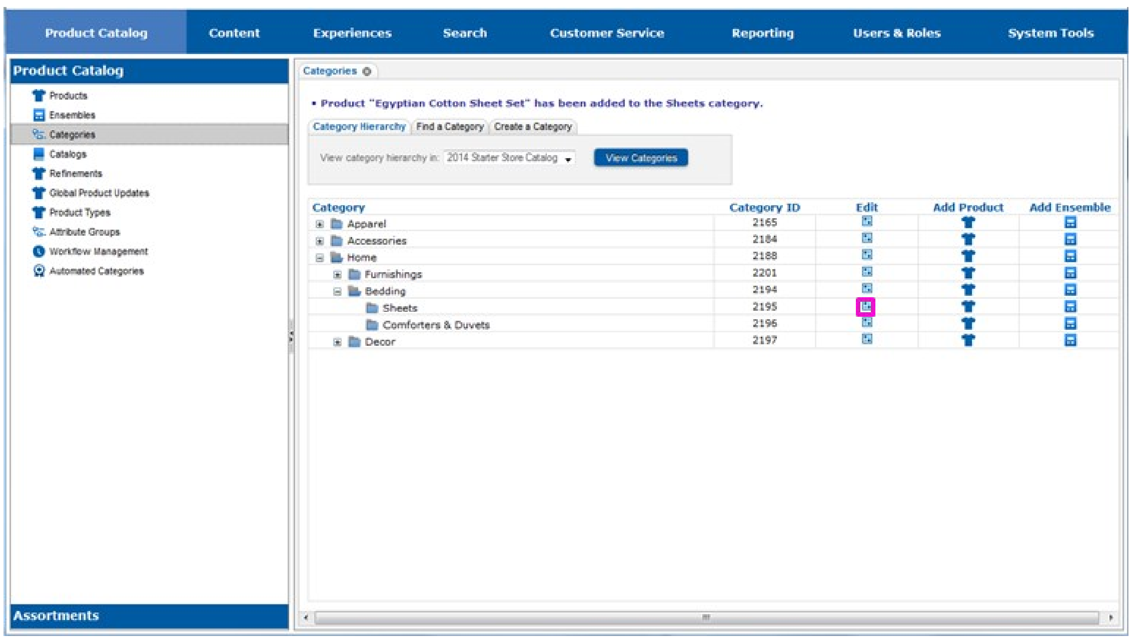
⇒ Close the product selection window.

On the main Site Manager screen you will see a message on the category page that indicates that the product has been added to the category.



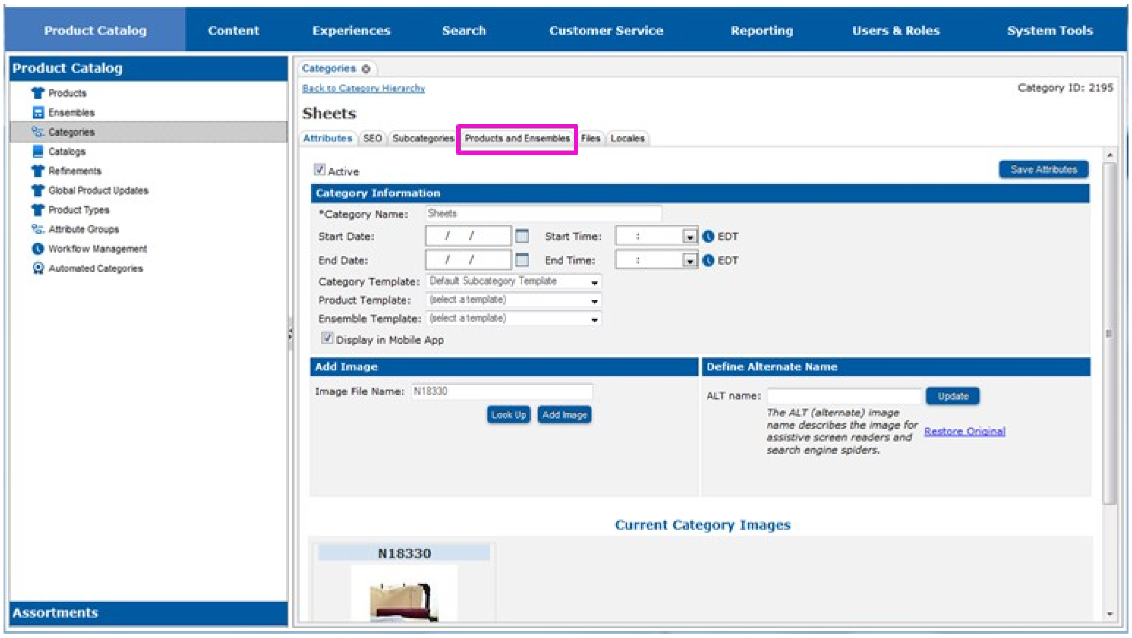
Your product has been added to the category, but it is not yet active in that category. Inactive products are not shown on the site when a visitor browses to a category. To activate the product, you need to edit the category.

⇒ Select the EDIT icon to the right of the category.

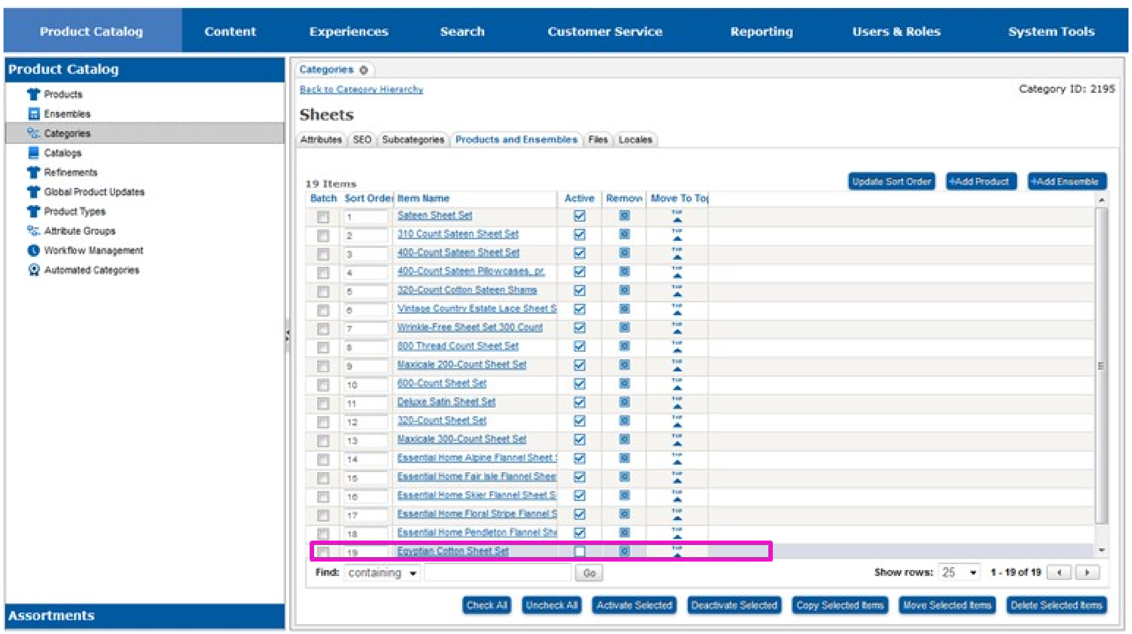


The page will refresh and you will see a number of different tabbed pages, all of which are specific to this category. To activate the product, go to the PRODUCTS AND ENSEMBLES TAB

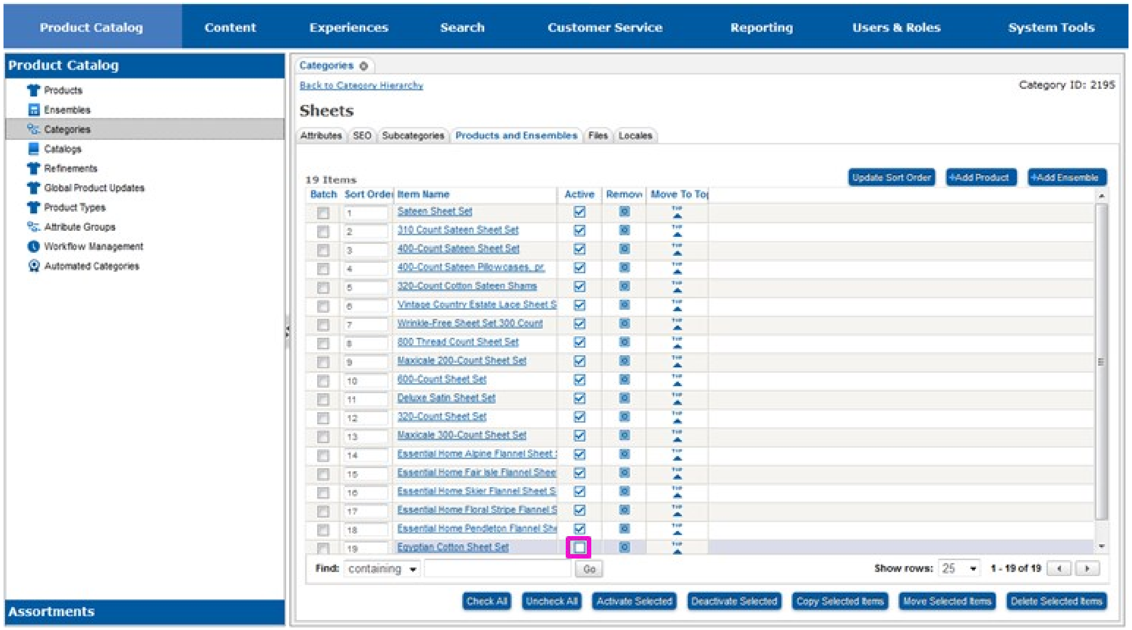
⇒ Select the PRODUCTS AND ENSEMBLES tab.



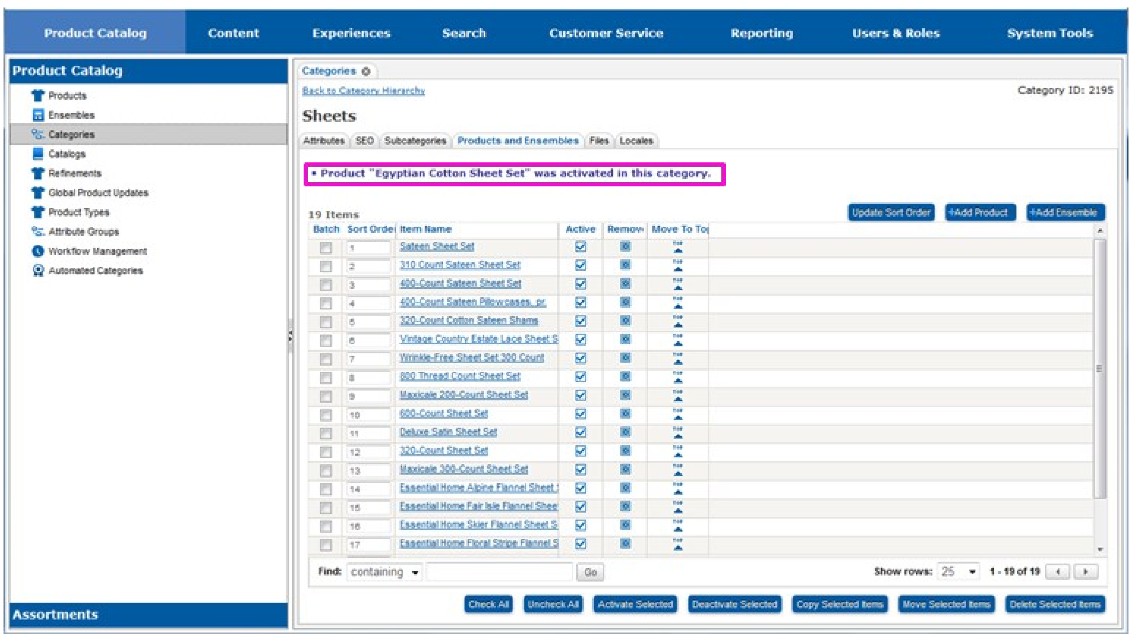
You will see a list of all of the products that are currently included in the category. The newly added product will be included in the list.



⇒ Select the ACTIVATE checkbox to the right of the newly added product.



The page will refresh and you will see a message indicating that the product is now active in the category.



See also

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Optional - View the Category Before Adding the Product
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Changing Catalogs
Optional - Viewing the Category After Addition
Modifying the Order of Products in a Category
Optional - Viewing the Category After Reordering

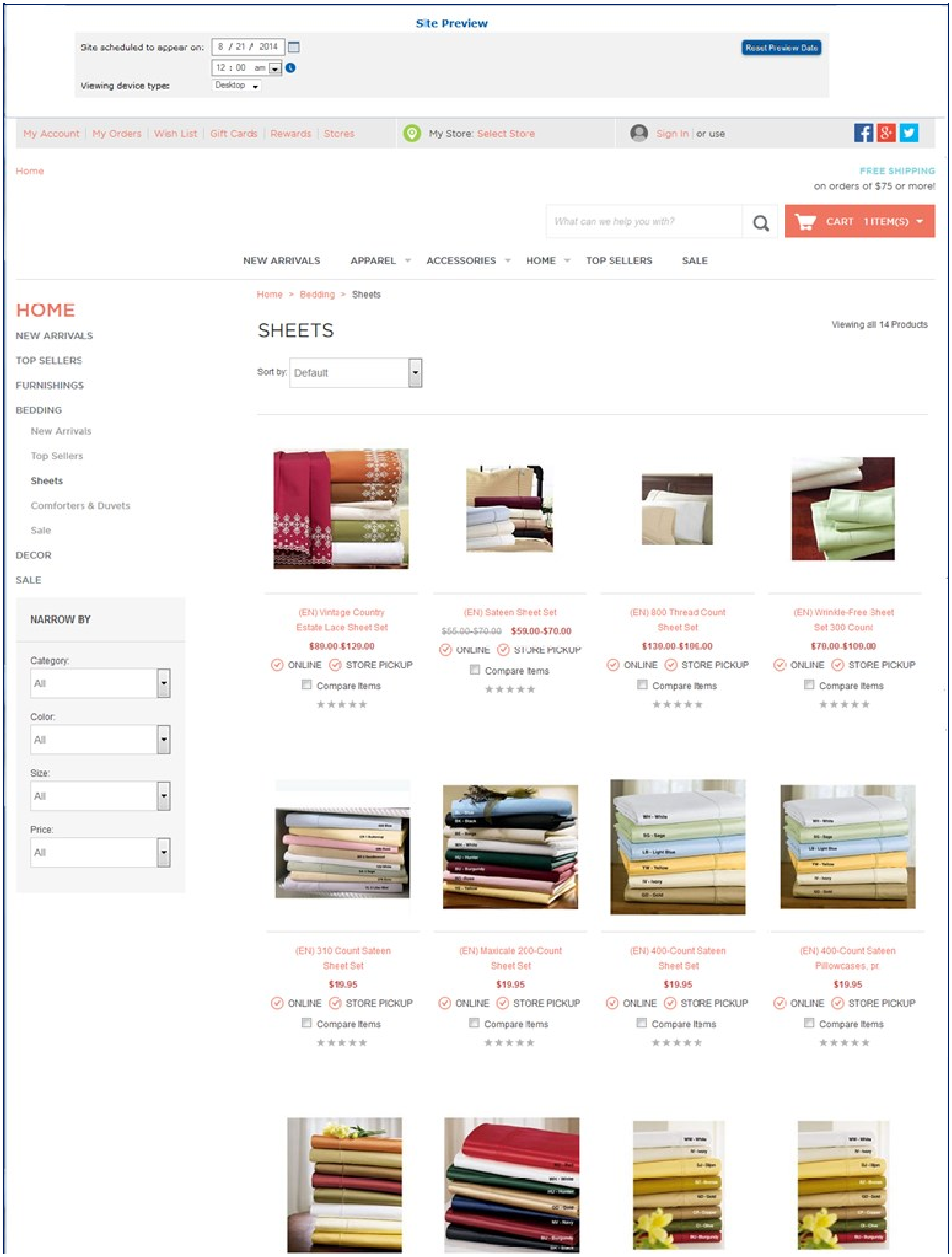
Home > Tutorials > Adding Products To Categories > Optional - Viewing the Category After Addition

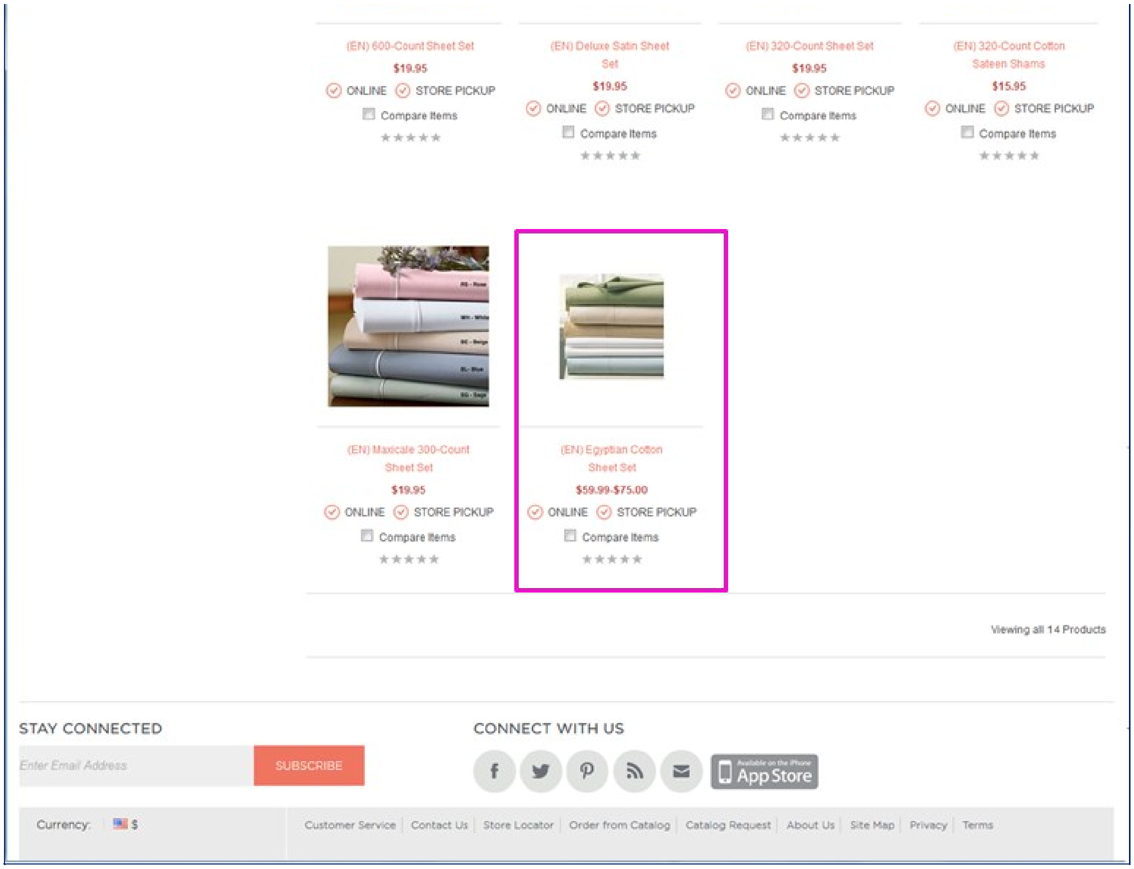
Optional - Viewing the Category After Addition

You may want to view the category on the website now that the product has been added to it.

⇒ Repeat the steps in section ***Optional - View the Category before Adding the Product*** to access the preview of the site.

You will see the product listed in the category.





See also

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Changing Catalogs
Adding the Product
Modifying the Order of Products in a Category
Optional - Viewing the Category After Reordering

Home > Tutorials > Adding Products To Categories > Modifying the Order of Products in a Category

Modifying the Order of Products in a Category

You can modify the order of the product in the category, which affects the order the product is displayed in when the category is browsed. There are a variety of ways to do this. If you are moving the product to the middle of the list, you may either move it by dragging or move it by modifying the sort order.

Articles in this section

Reordering by Dragging

Reordering by Modifying the Sort Order

See also

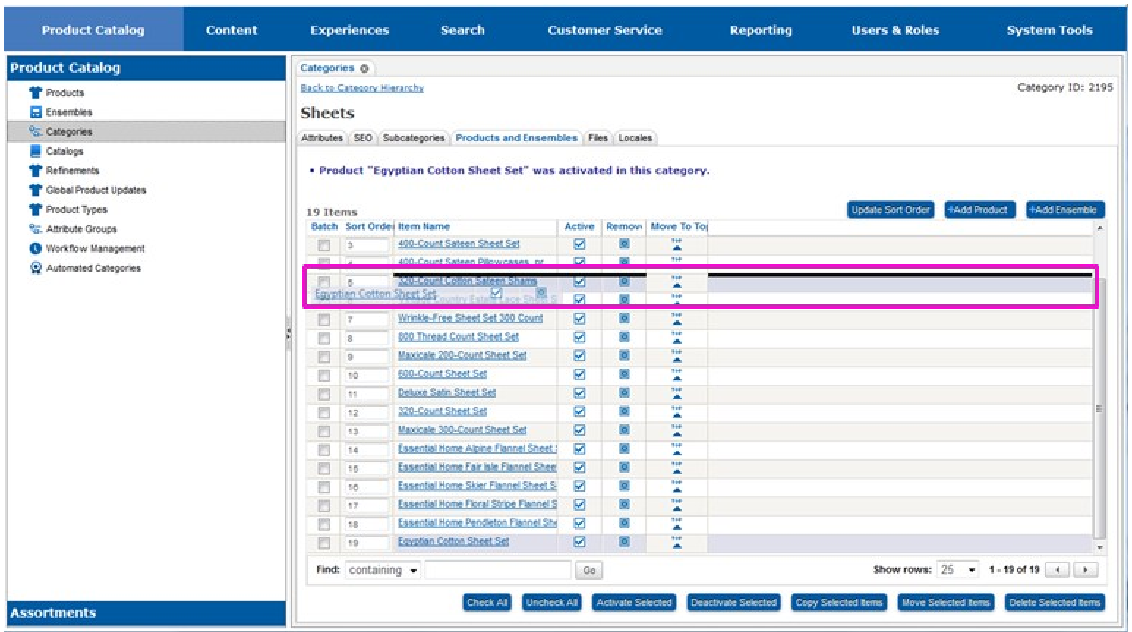
Before You Begin
The Example Used
Optional - View the Category Before Adding the Product
Locating the Category
Changing Catalogs
Adding the Product
Optional - Viewing the Category After Addition
Optional - Viewing the Category After Reordering

Home > Tutorials > Adding Products To Categories > Modifying the Order of Products in a Category > Reordering by Dragging

Reordering by Dragging

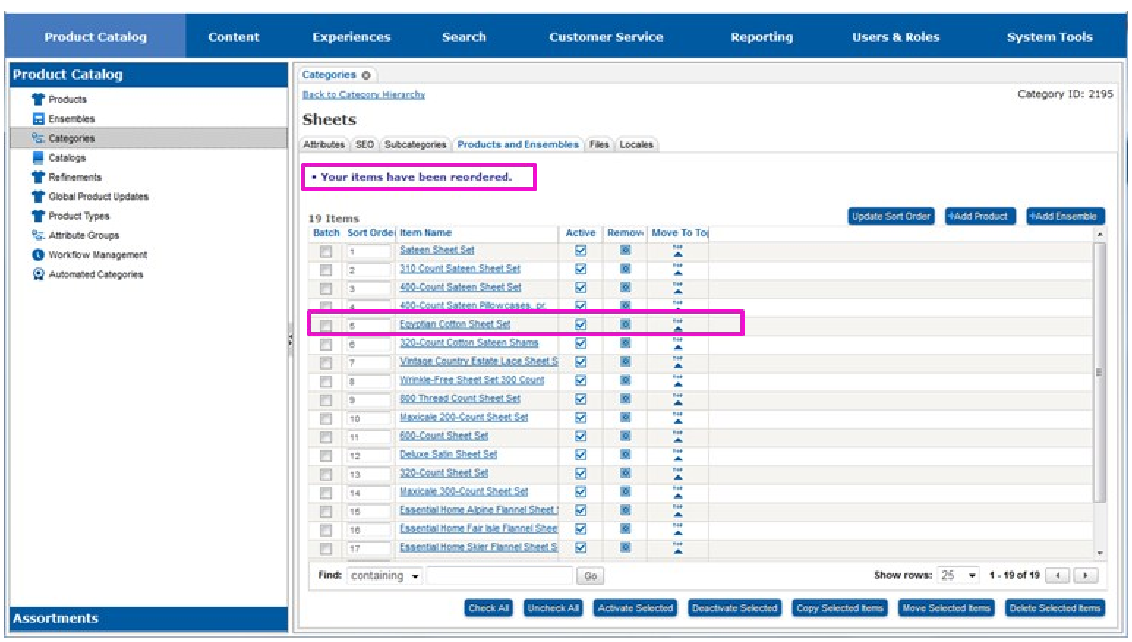
⇒ Select the product you added. Do not lift up on the mouse key.

⇒ While holding down the mouse key, drag the product to the point you want it to appear in the list. You will see a solid black line that moves up and down as you move the mouse. The black line indicates where the product will be placed in the list.



⇒ Lift up on the mouse key when the black line is in the area where you want the product placed.

The list will redraw and the product will appear in the new place in the list.



See also

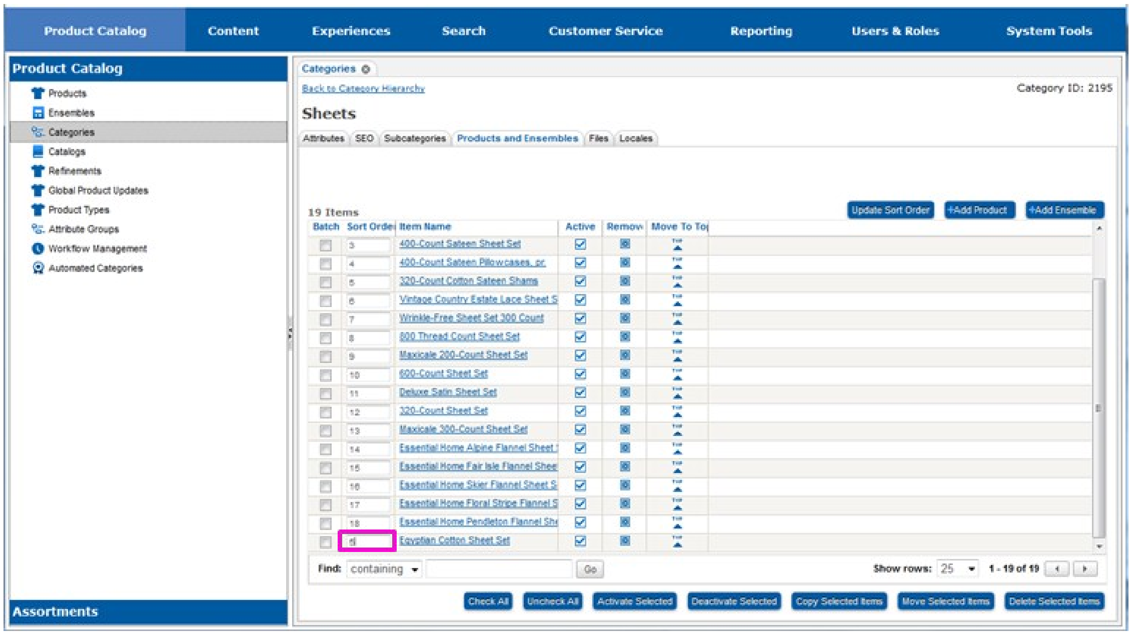
Reordering by Modifying the Sort Order

Home > Tutorials > Adding Products To Categories > Modifying the Order of Products in a Category > Reordering by Modifying the Sort Order

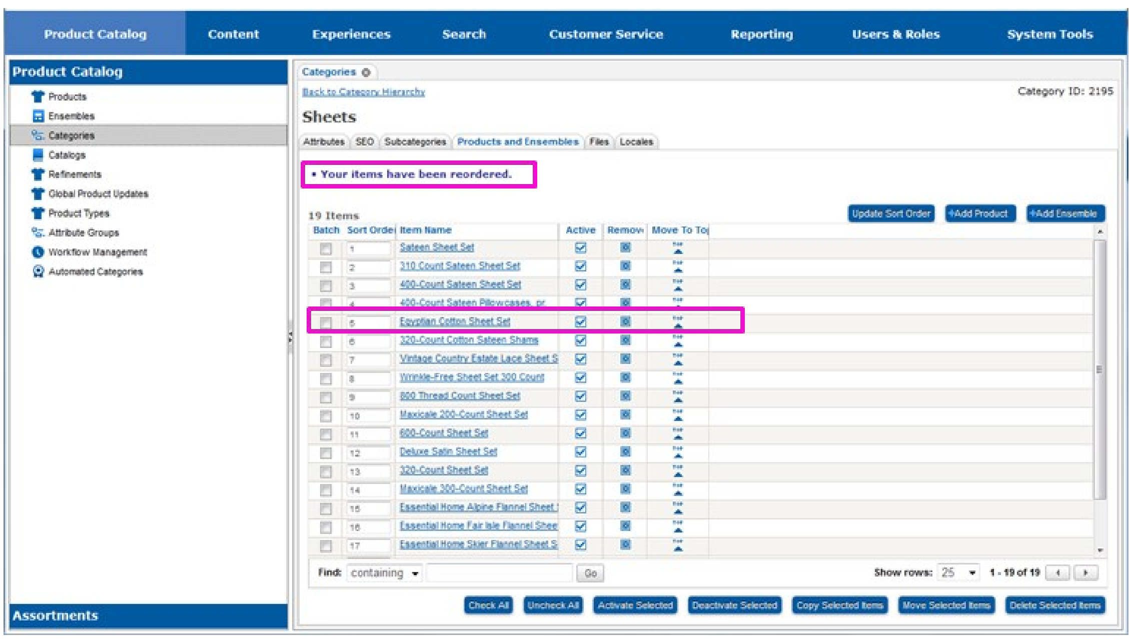
Reordering by Modifying the Sort Order

⇒ Enter a number that corresponds to the product's desired sort position in the Sort Order column.

⇒ Select UPDATE SORT ORDER.



The list will redraw and you will see that the product has been moved to the position you specified.



See also

Reordering by Dragging

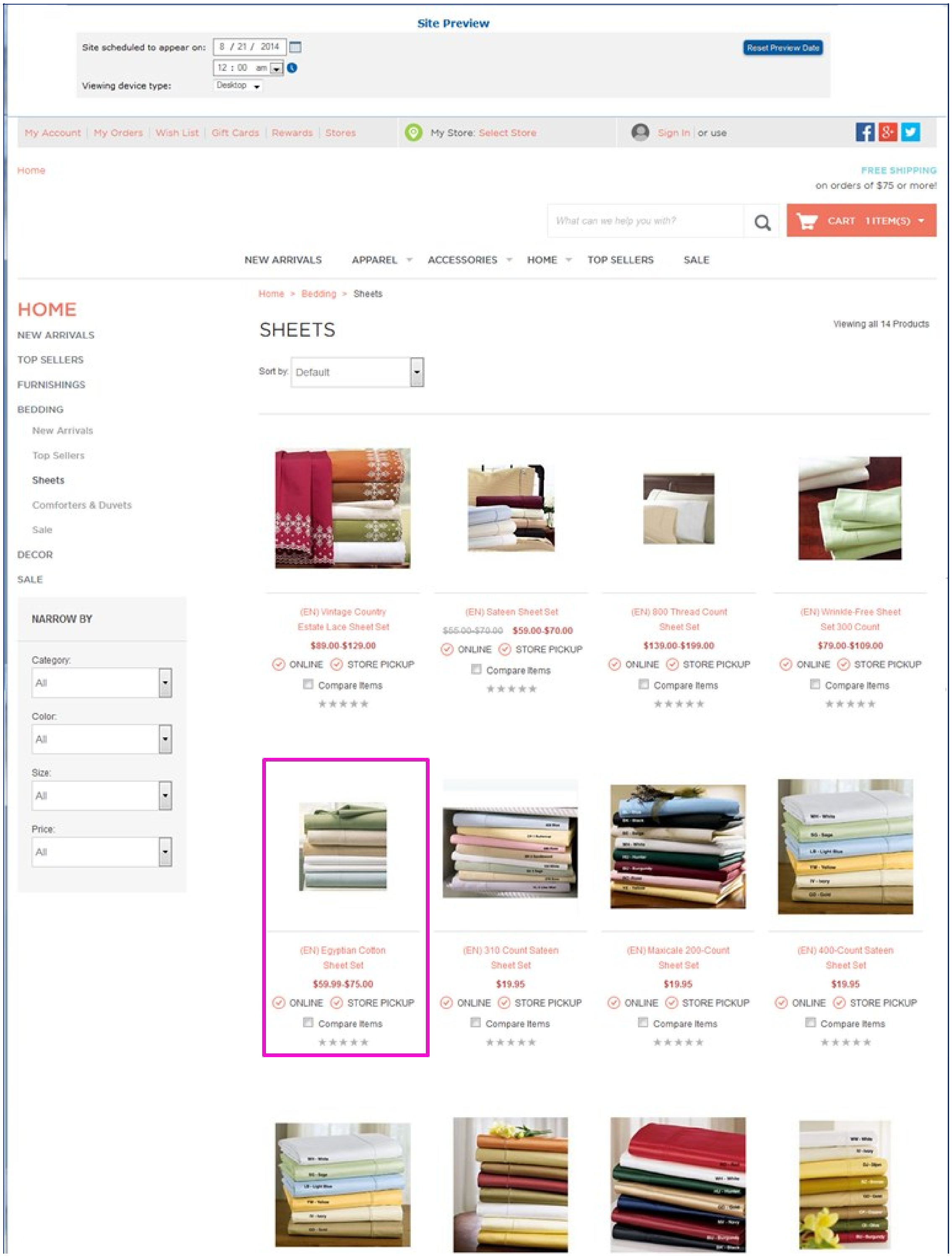
Home > Tutorials > Adding Products To Categories > Optional - Viewing the Category After Reordering

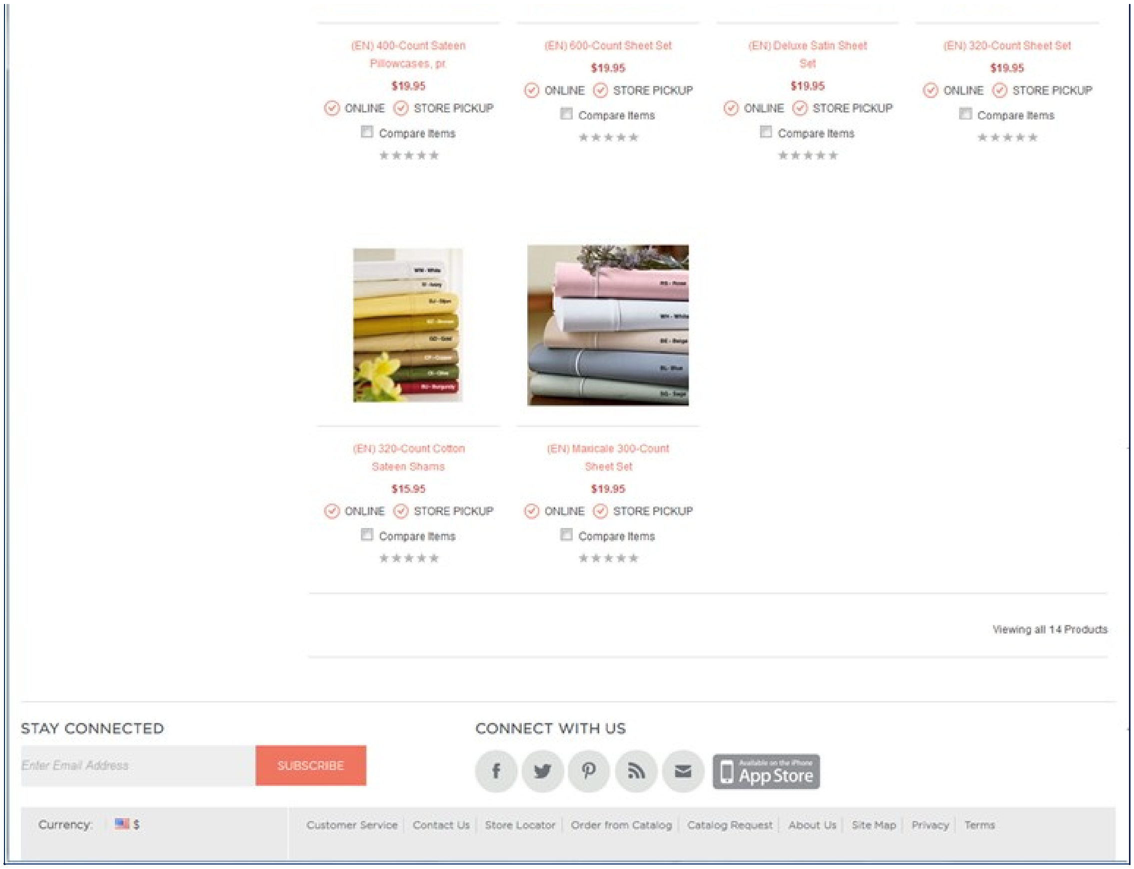
Optional - Viewing the Category After Reordering

You may want to view the category after you have reordered the products in it.

⇒ Repeat the steps in section ***Optional - View the Category before Adding the Product*** to access the preview of the site.

You will see the product has changed position within the category.





See also

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Modifying the Order of Products in a Category

Home > Tutorials > Adding Synonyms to the Thesaurus

Adding Synonyms to the Thesaurus

This tutorial describes how to add synonyms to the thesaurus in the Site Manager. When a visitor to the site searches on a word, the thesaurus is used to expand the search results and increase the chance that the search will return results that are meaningful to the visitor. Having a rich set of synonyms in the thesaurus improves the chances that the visitor will be satisfied with the search results.

Conventions Used in this Tutorial

SMALL CAPS: Items that appear in small caps refer to text items on the application. If you are viewing the application, you should see a label, menu, or button with the same text on it.

⇒: Arrows appear at the beginning of areas that contain a task you should perform. When you see the arrow, you should perform the described task.

: Pink outline boxes are used to highlight areas of screenshots that are being referred to in the text. These are used to call attention to a particular area of the screen, but you will not see those boxes on your screen when you are using the application.

Articles in this section

Before You Begin

The Examples Used

Add Synonyms

Multi-relationship Example

See also

Adding Products To Categories
Creating an Experience for a Promotion
Creating an Experience for an A/B Test
Creating Dynamic Attributes
Creating New Products
Modifying Content
Working With Stores

Legal Notices

Home > Tutorials > Adding Synonyms to the Thesaurus > Before You Begin

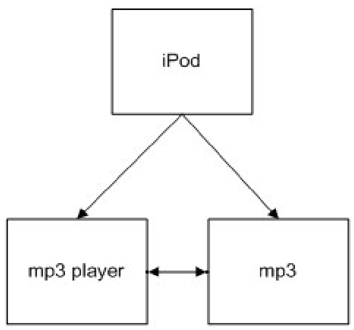
Before You Begin

Synonyms are added to the thesaurus using the Site Manager. Before you begin adding synonyms, you should:

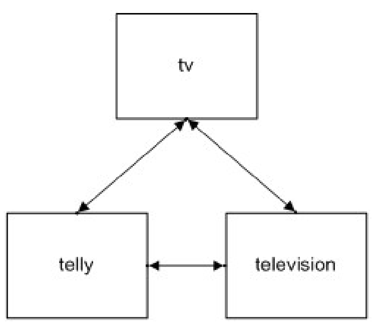
- Have a valid Site Manager log in and know how to access the Site Manager;
- Know how to navigate the Site Manager and find various sections in it;
- Be logged in to the Site Manager;
- Know which synonyms you want to add and which terms to associate them with;
- Know the relationships between the synonyms and the terms.

The Site Manager defines two different relationships that can be used with synonyms: one-way and two-way:

- In a one-way relationship (➔) one primary term is established as a synonym for a collection of words. For example, assume you want to set up a relationship among the words "ipod", "mp3 player", and "mp3" where if "mp3 player" or "mp3" is searched for, you'd also like to have matches for "ipod" returned with the search results. But if "ipod" is searched for, you do not want matches for "mp3 player" or "mp3" returned. (The assumption here is that the customer who searches for "ipod" wants a specific kind of digital music player, whereas "mp3" and "mp3 player" will return broader results.) This means that "ipod" is a synonym for both "mp3" and "mp3 player", but "mp3" and "mp3 player" are not synonyms for "ipod". This scenario describes a one-way relationship where "ipod" is the primary term. In a one-way relationship, the primary term is a synonym for the other terms, but other terms are not synonyms for the primary term.



- A two-way relationship (⟺) is a relationship where there is no primary term and all the terms are synonyms for each other. An example of this would be "tv" , "television" and "telly" where no matter which term was searched on, you want to return search results that contained matches for all the terms.



Synonyms sometimes have one-way relationships with some terms and two-way relationships with other terms. See ***Multi-relationship Example*** for an example of this.

See also

The Examples Used
Add Synonyms
Multi-relationship Example

The Examples Used

There are two examples that are used in this document to illustrate the two different types of synonym relationships. The first example uses the terms "iPod", "mp3", and "mp3 player" and illustrates the one-way relationship, where the terms are not all synonyms for each other. The second example uses the terms "tv", "television", and "telly" and illustrates the two-way relationship, where the terms are all synonyms for each other.

See also

Before You Begin
Add Synonyms
Multi-relationship Example

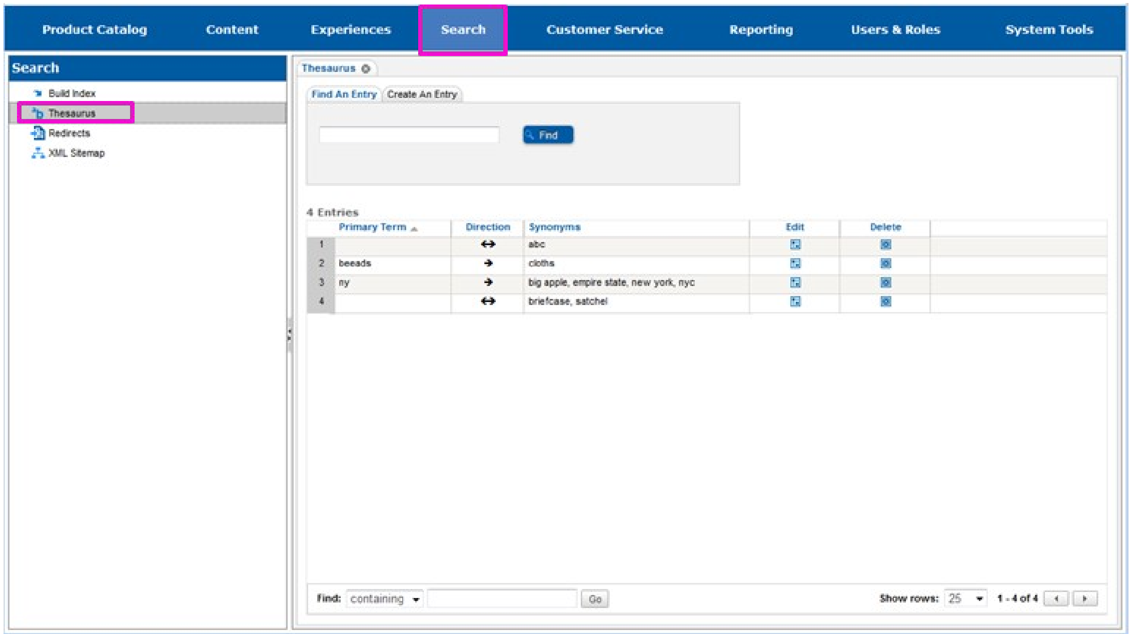
Home > Tutorials > Adding Synonyms to the Thesaurus > Add Synonyms

Add Synonyms

The thesaurus is located in the SEARCH portion of the Site Manager.

⇒ Select SEARCH.

⇒ Select THESAURUS from the left-hand pane.



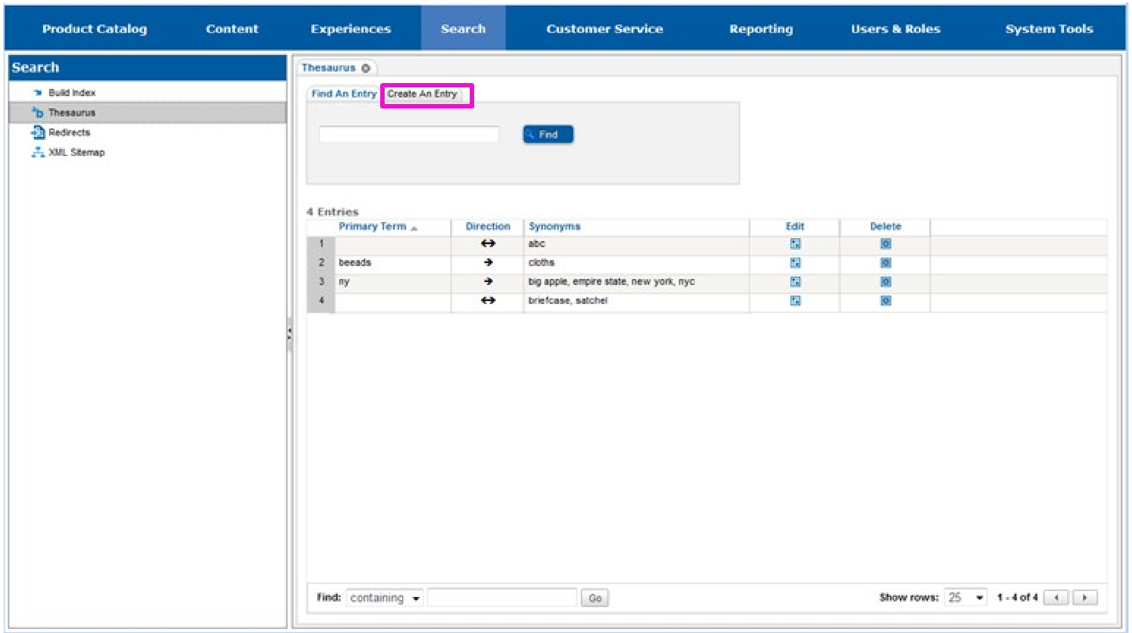
From here you can:

⇒ Find a thesaurus entry

⇒ Create a new thesaurus entry

For this example we will assume the synonyms should not be added to an existing entry and we will describe creating a new entry.

⇒ Select CREATE AN ENTRY.



In the CREATE AN ENTRY tab, you will do things differently depending upon whether your synonyms have a one-way or a two-way relationship. If you are creating synonyms with a one-way relationship, follow the steps in section ***Create Synonyms with One-Way Relationships***. If you are creating synonyms with a two-way relationship, follow the steps in section ***Create Synonyms with Two-Way Relationships*** .

Articles in this section

Create Synonyms With One-Way Relationships

Create Synonyms with Two-Way Relationships

View the Results

See also

Before You Begin
The Examples Used
Multi-relationship Example

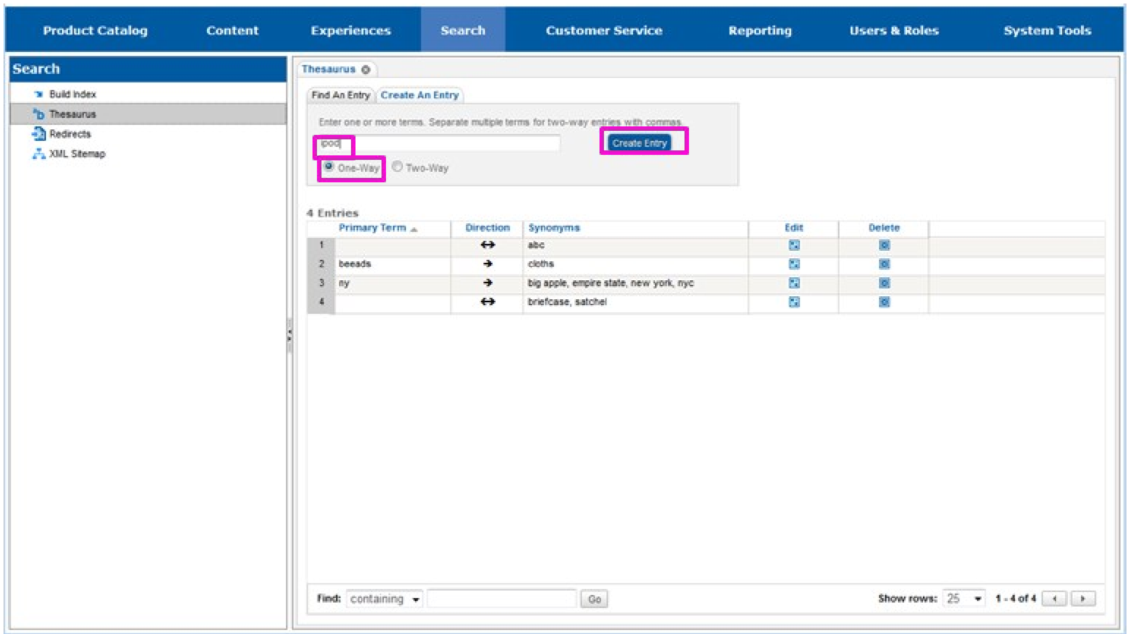
Create Synonyms With One-Way Relationships

When creating synonyms with one-way relationships, enter the primary term first and then enter the rest of the synonyms.

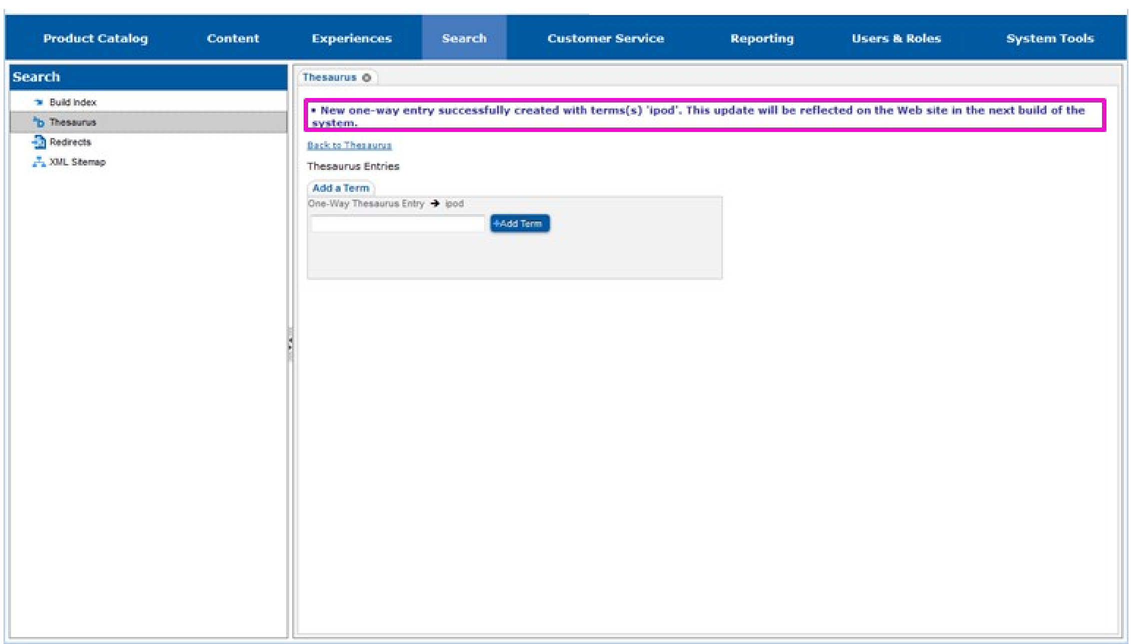
⇒ Select ONE-WAY.

⇒ Enter the primary term in the text box.

⇒ Select CREATE ENTRY.



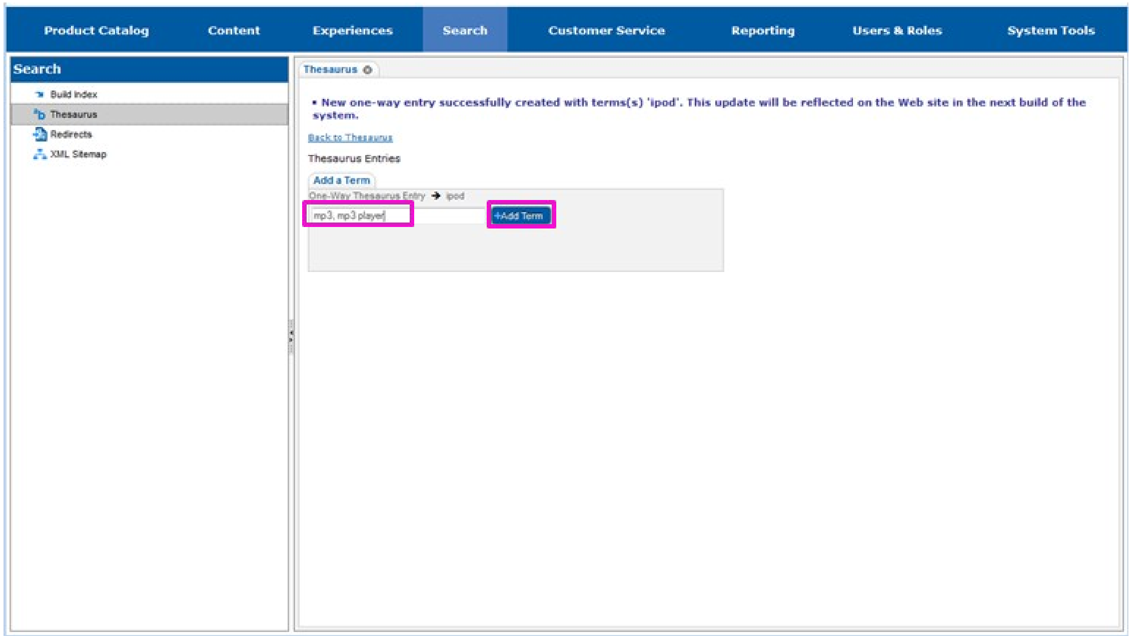
After CREATE ENTRY is selected, the page will refresh and you will see a message saying the synonym has been added.



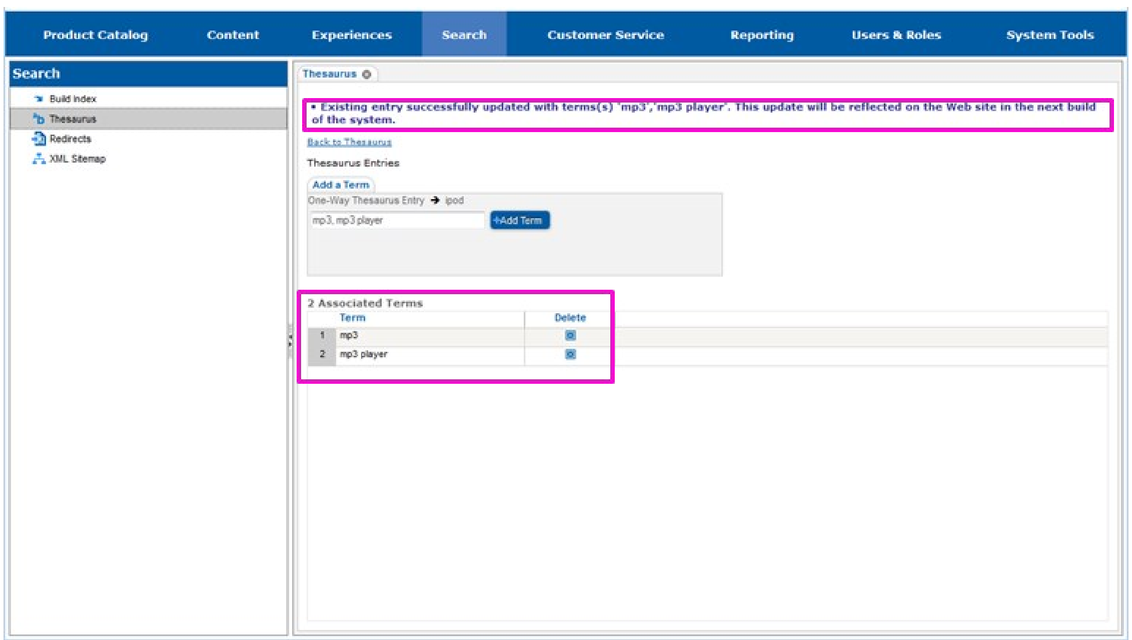
The synonyms for the primary term now need to be added. These are added in the Add a Term tab area. They can be added one at a time, but it is more efficient to add them at the same time.

⇒ Enter the synonyms for the primary term in the text box. Use commas to separate the terms.

⇒ Select ADD TERM.



After ADD TERM is selected, the page will refresh and you will see a message indicating the terms have been added You will also see a list of the terms under the ADD A TERM box.



Continue on to section ***View the Results*** .

See also

Create Synonyms with Two-Way Relationships
View the Results

Home > Tutorials > Adding Synonyms to the Thesaurus > Add Synonyms > Create Synonyms with Two-Way Relationships

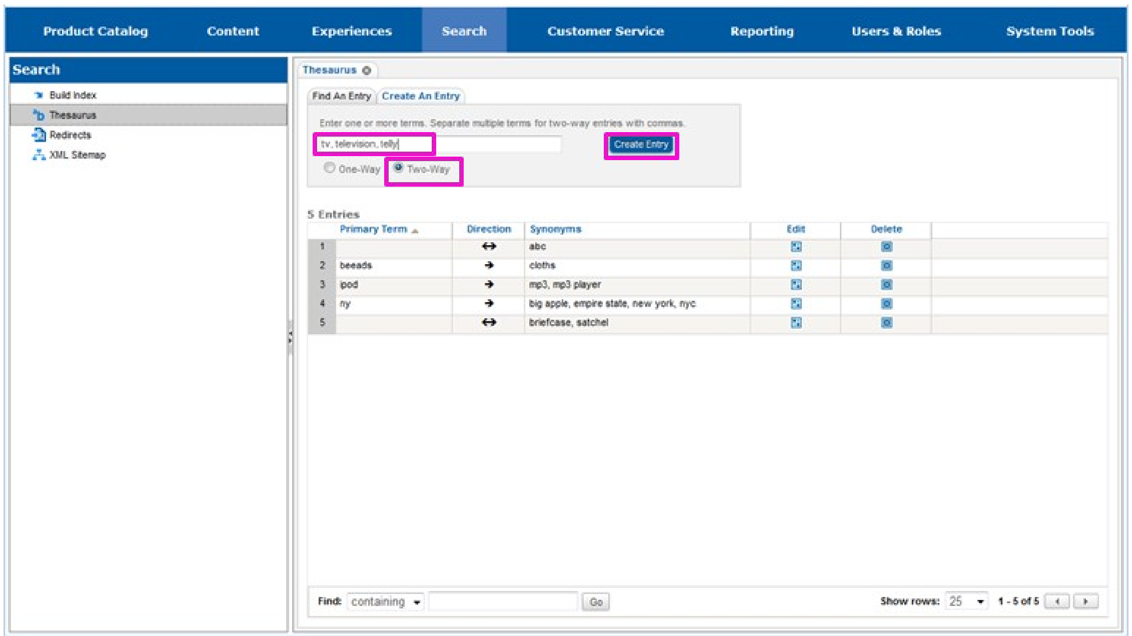
Create Synonyms with Two-Way Relationships

When creating synonyms with two-way relationships, all the synonyms are entered at the same time.

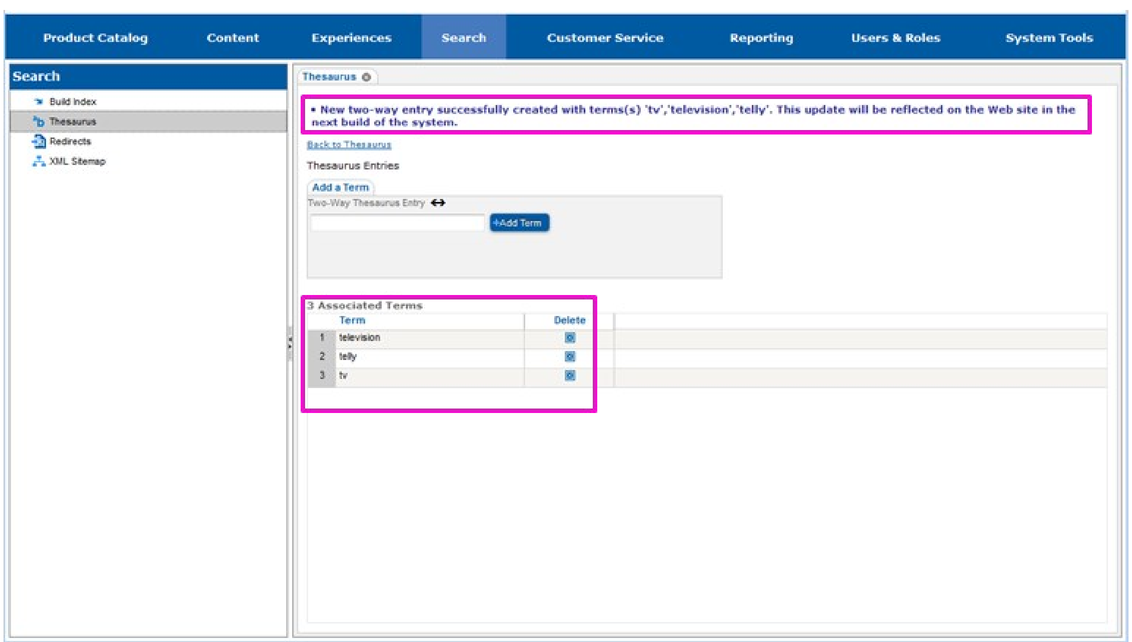
⇒ Select TWO-WAY.

⇒ Enter all the synonyms in the text box. Use commas to separate them.

⇒ Select CREATE ENTRY.



The page will refresh and you will see a message indicating your synonyms have been entered.



Continue on to section ***View the Results*** .

See also

Create Synonyms With One-Way Relationships
View the Results

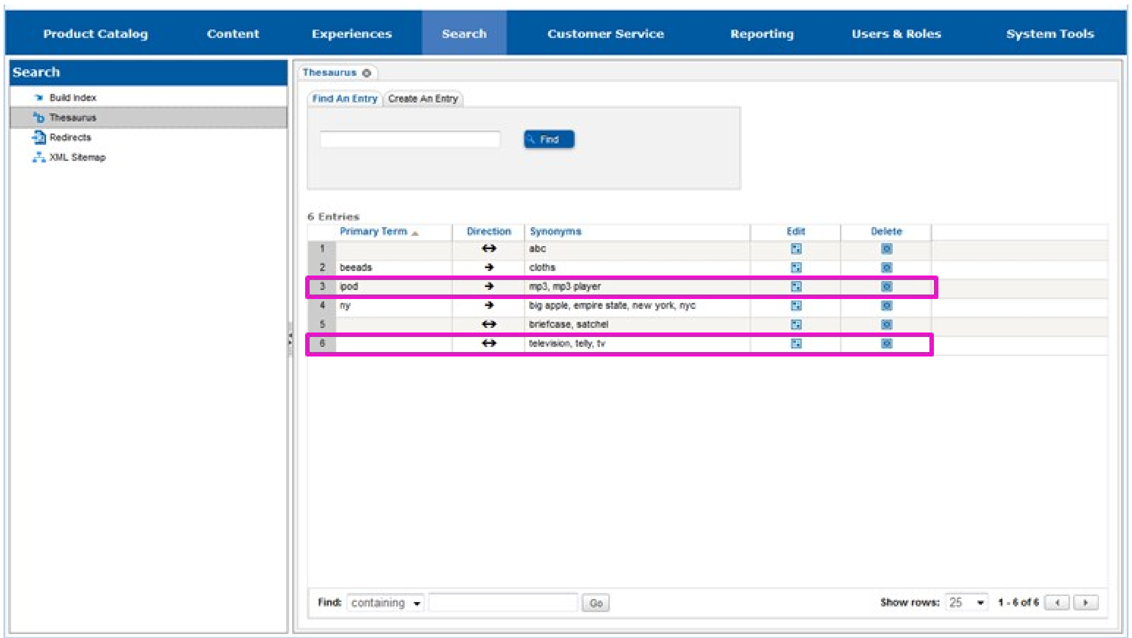
View the Results

Once you have entered your synonyms, you can see them included in the list of all synonyms.

⇒ Select BACK TO THESAURUS.

⇒ Select VIEW ALL ENTRIES.

You will see your synonyms included in the list of all of the synonyms defined in the thesaurus.



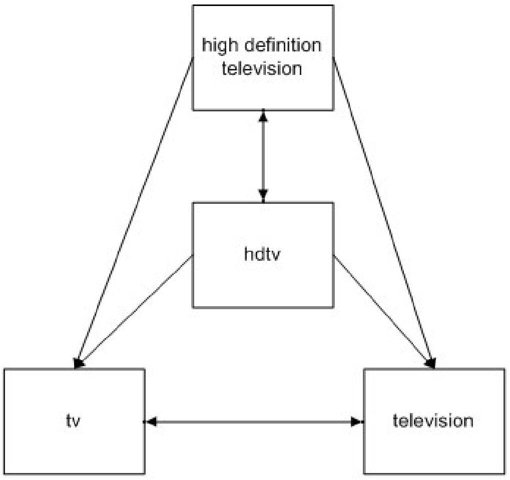
See also

Create Synonyms With One-Way Relationships
Create Synonyms with Two-Way Relationships

Home > Tutorials > Adding Synonyms to the Thesaurus > Multi-relationship Example

Multi-relationship Example

Synonyms will sometimes have different relationships with different terms. An example of one such relationship is shown below:



In this example there are four different synonym relationships:

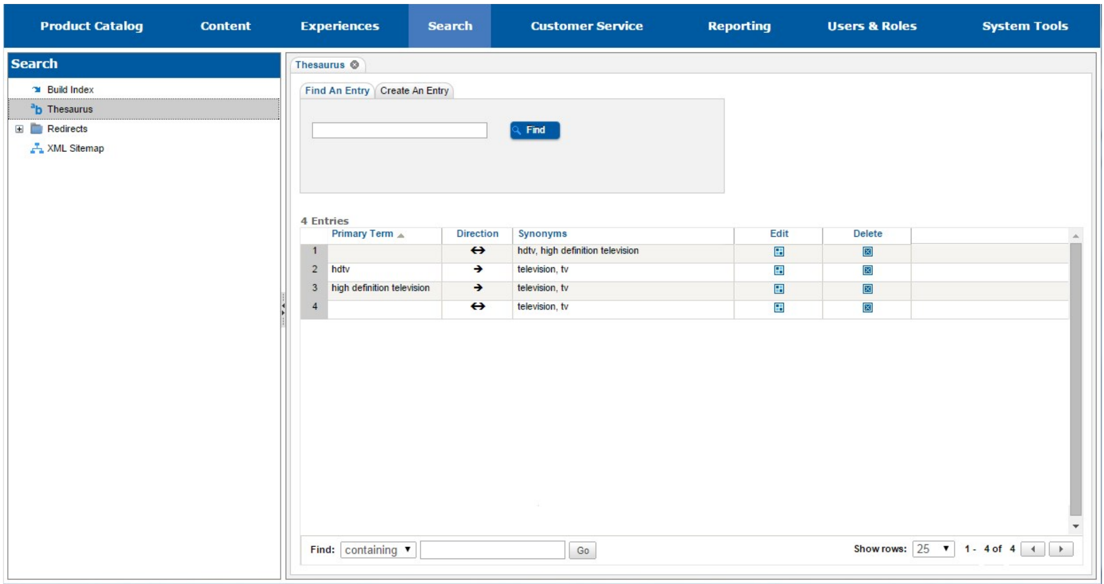
1. "high definition television" has a one-way relationship with "tv" and "television".
2. "high definition television" has a two-way relationship with "hdtv".
3. "hdtv" has a one way relationship with "tv" and "television".
4. "tv" has a two way relationship with "television".

"high definition television" and "hdtv" both have one-way and two-way relationships with other keywords. When these words are used as search terms, "high definition television" will return the same result set as "hdtv"."tv" will return the same result set as "television". Search results for "tv" or "television" will include matches for "high definition television" and "hdtv". But search results for "high definition television" or "hdtv" will not include matches for "tv" or "television".

To enter these synonyms into the thesaurus correctly, you create a list of the relationships (as above) and enter each relationship separately. To enter the above relationships, you would:

1. Follow the instructions in ***Create Synonyms with One-Way Relationships*** to enter a one-way relationship with "high definition television" as the primary term and "tv" and "television" as the terms related to it.
2. Follow the instructions in ***Create Synonyms with One-Way Relationships*** to enter a one-way relationship with "hdtv" as the primary term and "tv" and "television" as the terms related to it.
3. Follow the instructions in ***Create Synonyms with Two-Way Relationships***to enter a two-way relationship between "high definition television" and "hdtv".
4. Follow the instructions in ***Create Synonyms with Two-Way Relationships***to enter a two-way relationship between "tv" and "television".

You will see the following four entries in the thesaurus when you are done.



See also

Before You Begin
The Examples Used
Add Synonyms

Home > Tutorials > Creating an Experience for a Promotion

Creating an Experience for a Promotion

This tutorial describes how to create an experience that will provide a promotion for visitors to the site. The experience includes an email, a user group, a targeted content, and an award node.

Conventions Used in this Tutorial

SMALL CAPS: Items that appear in small caps refer to text items on the application. If you are viewing the application, you should see a label, menu, or button with the same text on it.

⇒: Arrows appear at the beginning of areas that contain a task you should perform. When you see the arrow, you should perform the described task.

: Pink outline boxes are used to highlight areas of screenshots that are being referred to in the text. These are used to call attention to a particular area of the screen, but you will not see those boxes on your screen when you are using the application.

Articles in this section

Before You Begin
The Example Used
Create an Experience
Add an Email
Add a User Group
Add Targeted Content
Add an Award
Set the Time Frame
Result: the Entire Experience
Optional: Testing the Experience

See also

Adding Products To Categories
Adding Synonyms to the Thesaurus
Creating an Experience for an A/B Test
Creating Dynamic Attributes
Creating New Products
Modifying Content
Working With Stores

Home > Tutorials > Creating an Experience for a Promotion > Before You Begin

Before You Begin

Promotions are manually added to a website by adding experiences in Site Manager. Before you begin creating an experience, you should:

- Have a valid Site Manager log in and know how to access the Site Manager;
- Know how to navigate the Site Manager and find various sections in it;
- Be logged in to the Site Manager;
- Know the details of the promotion you will be creating.

See also

The Example Used
Create an Experience
Add an Email
Add a User Group
Add Targeted Content
Add an Award
Set the Time Frame
Result: the Entire Experience
Optional: Testing the Experience

The Example Used

For this document we will be creating a sample experience to illustrate many of the steps you use when working with experiences. Our example shows how to create an experience for a promotion that is communicated via email to site users. If the user clicks on the link in the email or types the url into their browser, then they will see special targeted content on the site. They will also automatically receive 10% off their entire order.

You will be able to create similar experiences for promotions after working through this document.

See also

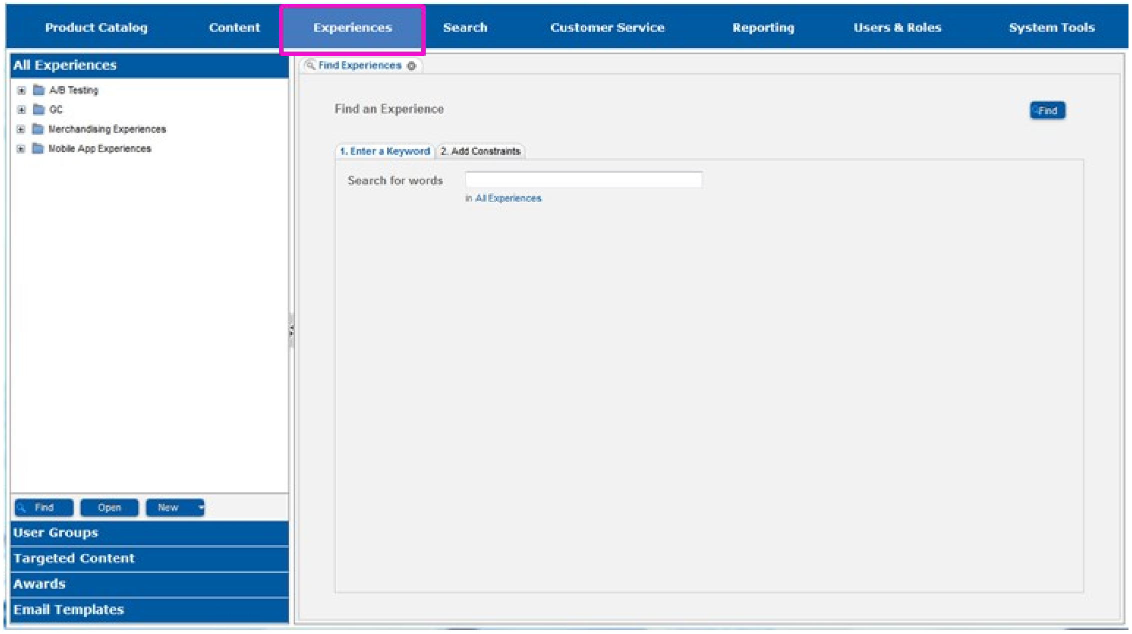
Before You Begin
Create an Experience
Add an Email
Add a User Group
Add Targeted Content
Add an Award
Set the Time Frame
Result: the Entire Experience
Optional: Testing the Experience

Home > Tutorials > Creating an Experience for a Promotion > Create an Experience

Create an Experience

Experiences are added in the EXPERIENCES section of the Site Manager.

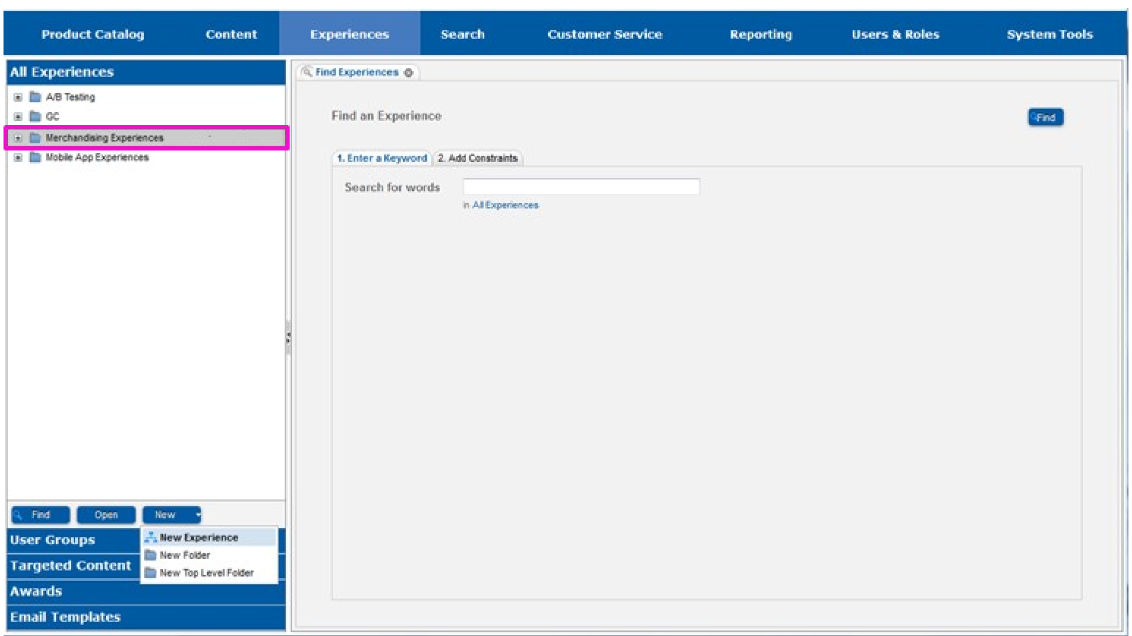
⇒ Select EXPERIENCES.



Experiences are created in the ALL EXPERIENCES pane of the left-hand menu.

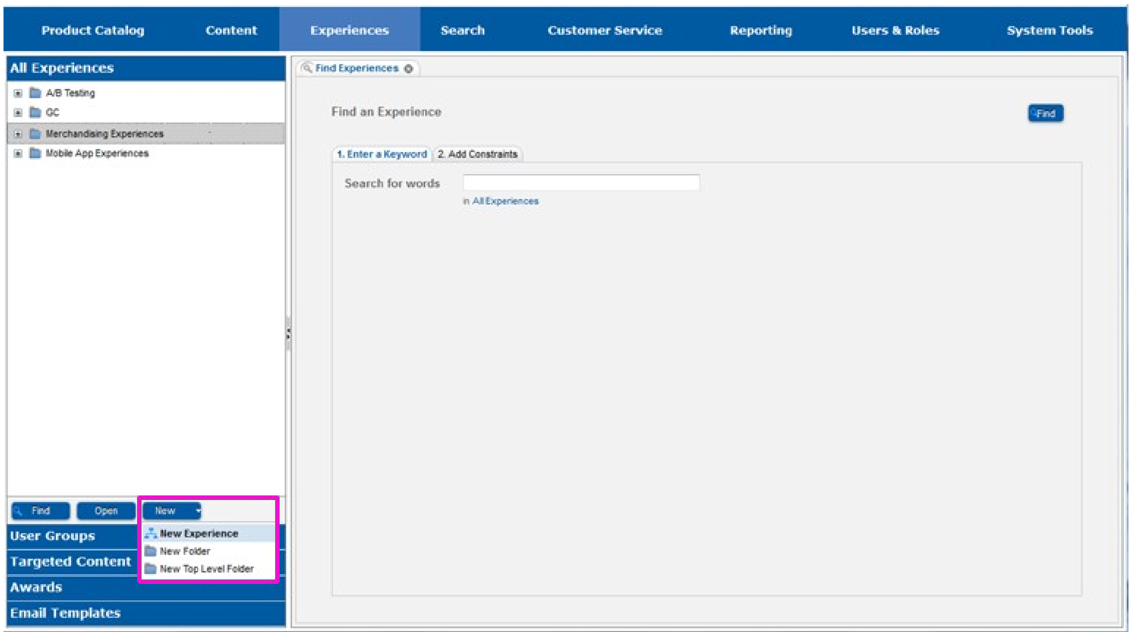
⇒ If the folder you would like the new experience to be in is not visible, select the plus sign (+) to the left of each folder until it is.

⇒ Select the folder you would like the experience to be in.

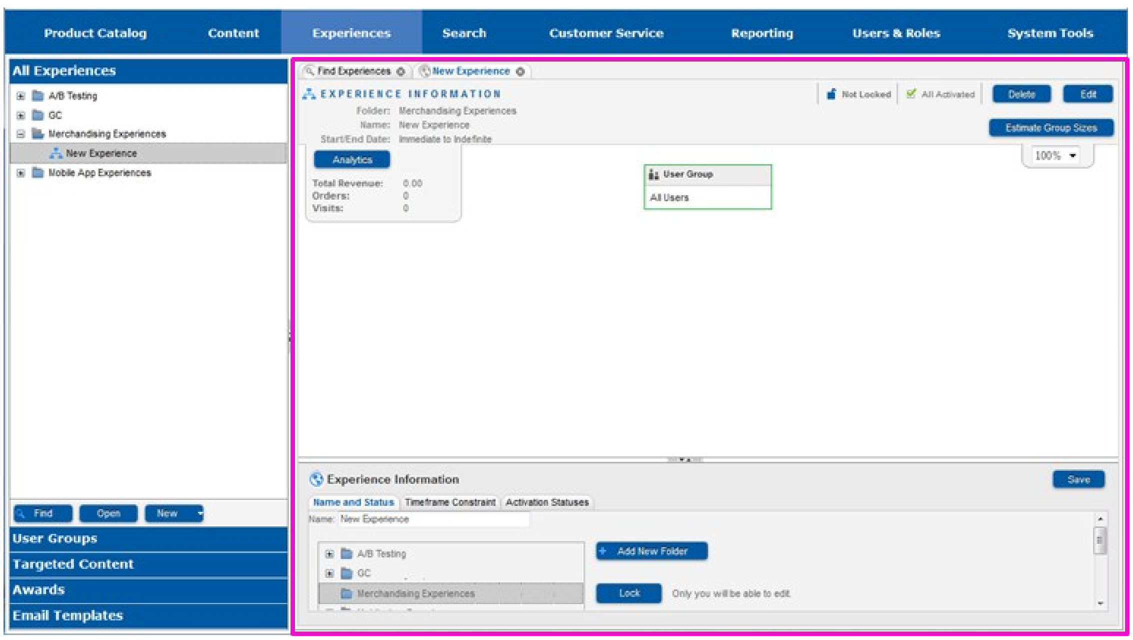


⇒ Select the arrow to the right of the NEW button.

⇒ In the drop-down menu that appears, select NEW EXPERIENCE.

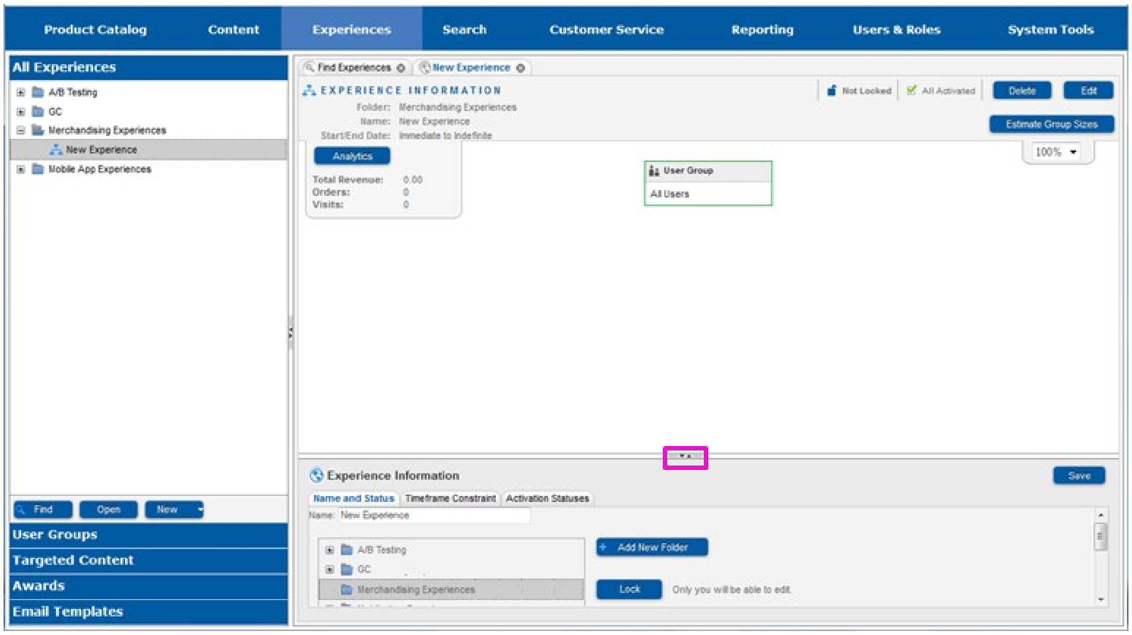


You will see the new experience open in the right hand working pane.

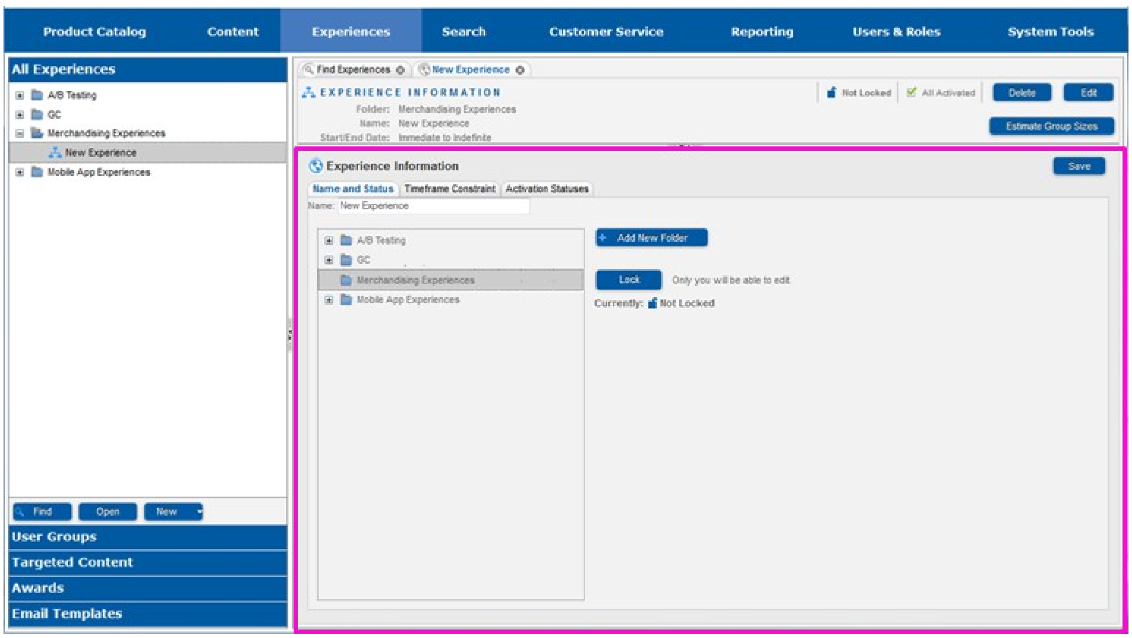


The bottom half of the working pane contains global information for the experience. You will need to modify some of that information.

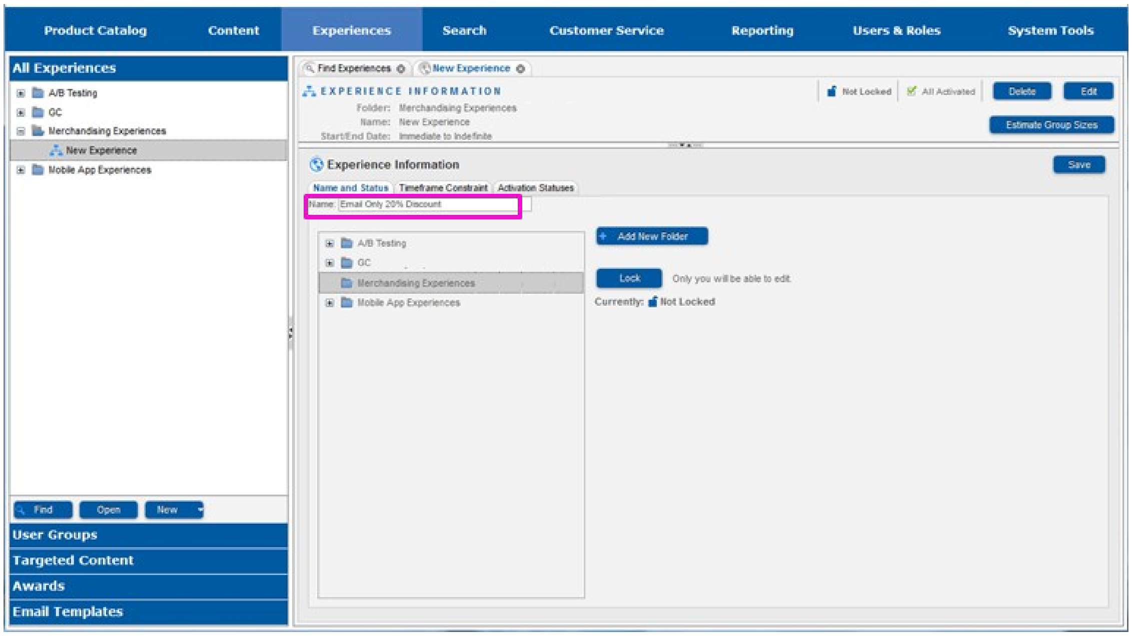
⇒ Select the arrow pointing up on the divider between the top and bottom halves of the right-hand work pane.



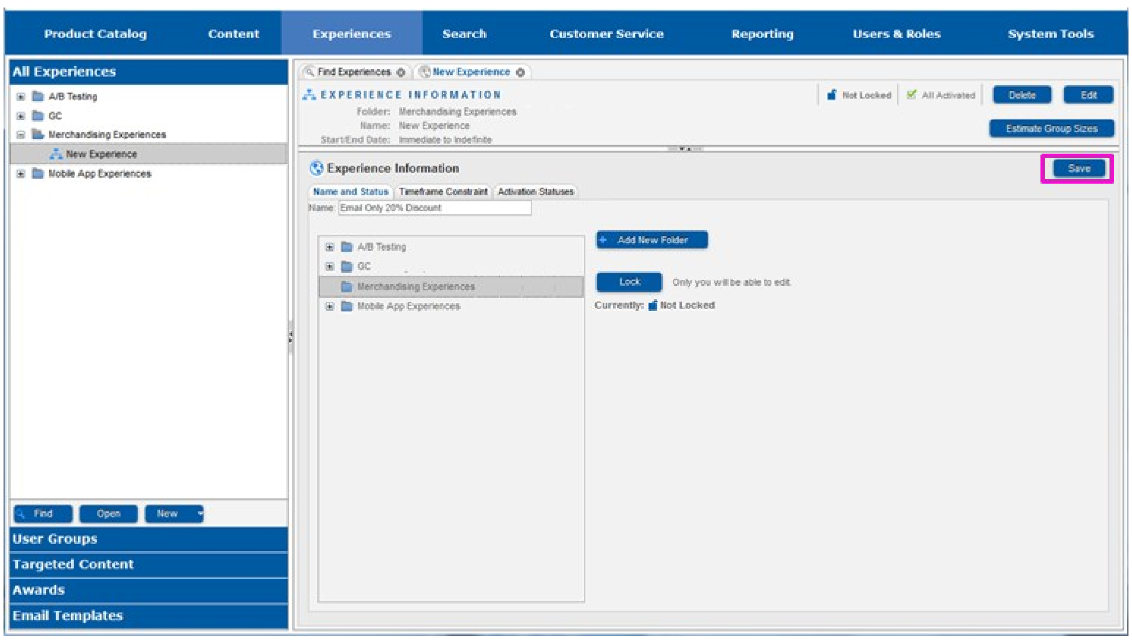
The properties pane will expand and fill the working pane.



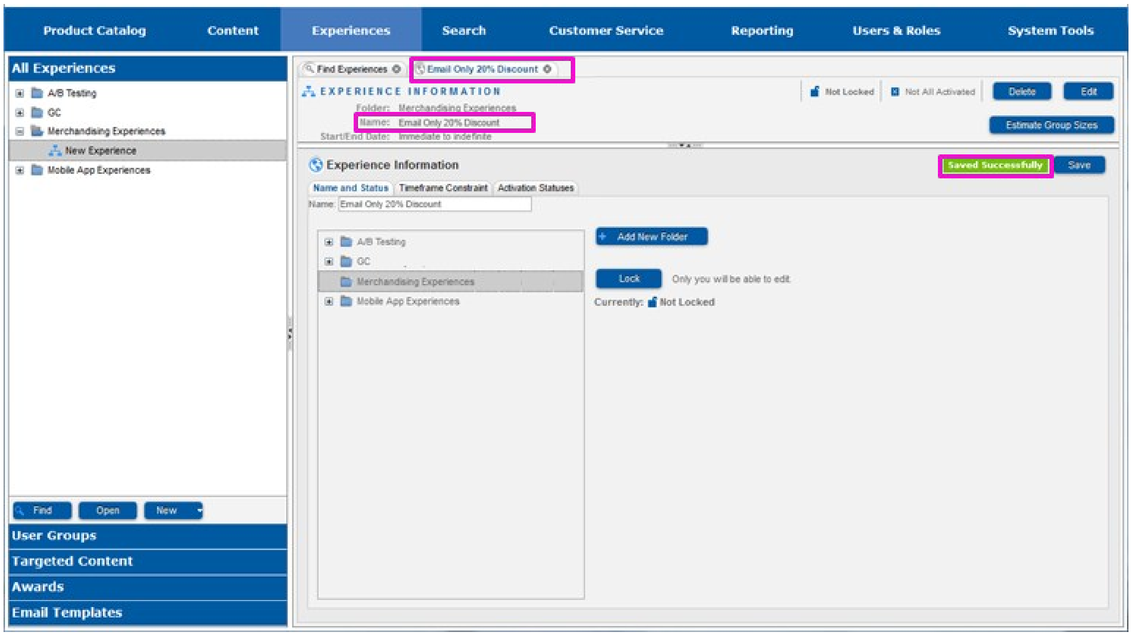
⇒ Enter a name for the experience in the NAME text box.



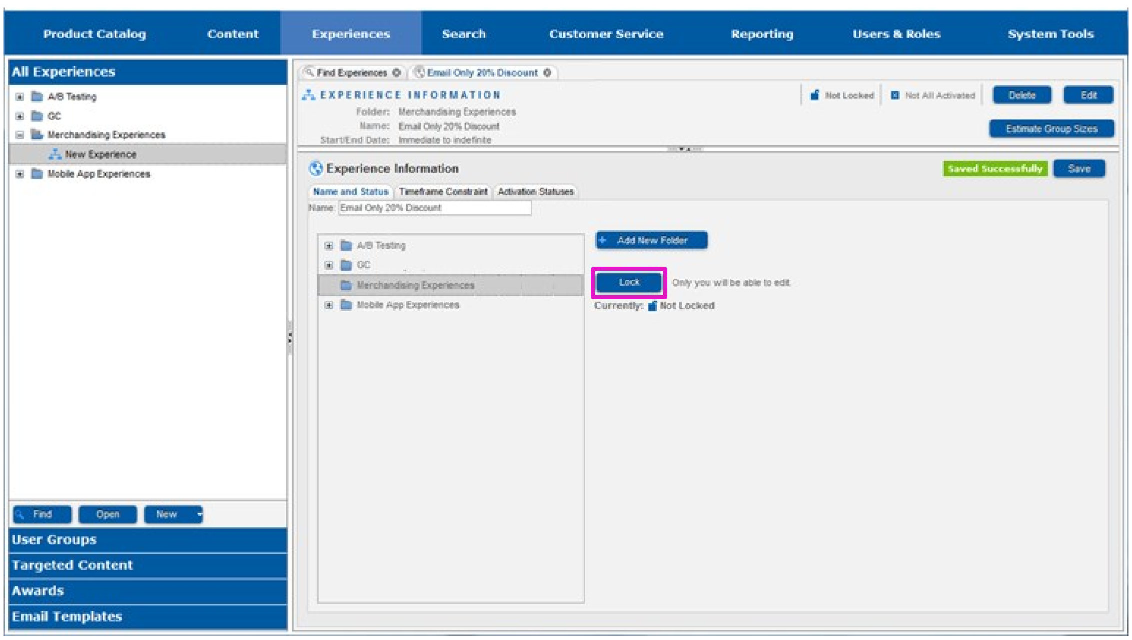
⇒ Select SAVE.



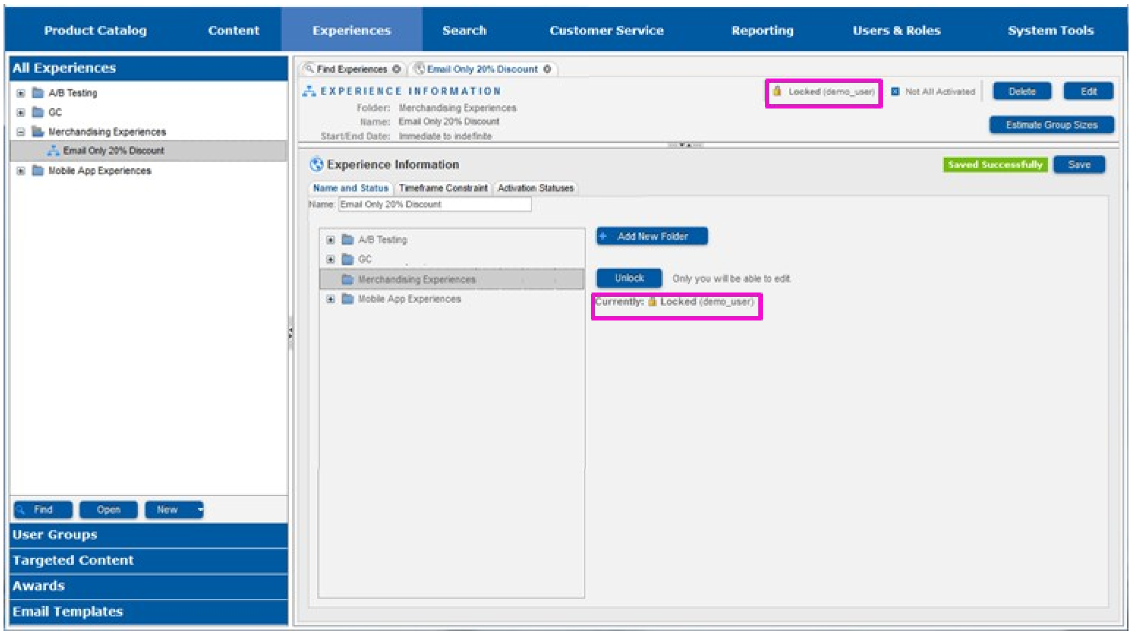
The screen will refresh and you will see a message that the save was successful. You will also see the new name of the experience in the tab header and the experience header pane.



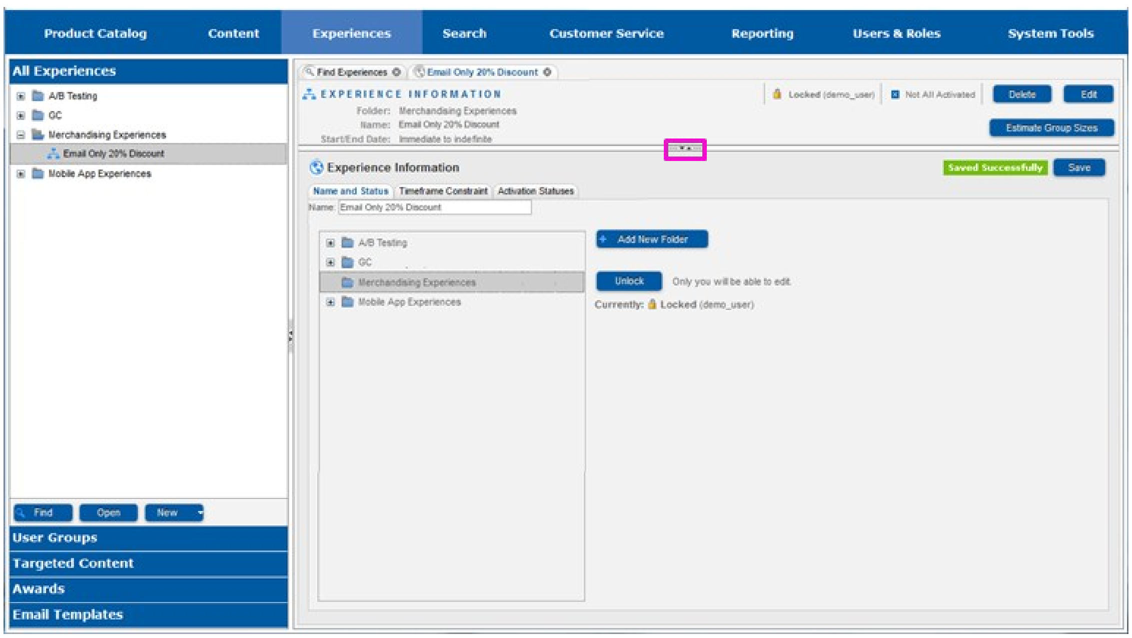
⇨ Select LOCK so that no one else can edit the experience.



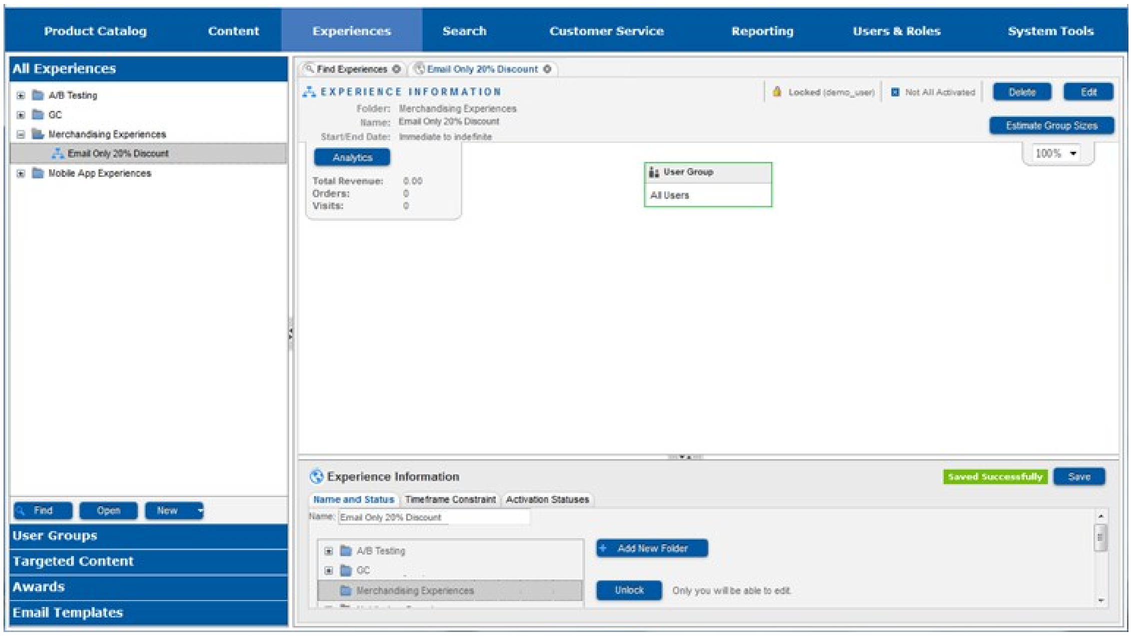
You will see that locked status of the experience will change from NOT LOCKED to LOCKED.



⇒ Select the arrow pointing down in the divider between the properties pane and the working pane..



The properties pane collapses and shows the rest of the working pane.



See also

[Before You Begin](#)
[The Example Used](#)
[Add an Email](#)
[Add a User Group](#)
[Add Targeted Content](#)
[Add an Award](#)
[Set the Time Frame](#)
[Result: the Entire Experience](#)
[Optional: Testing the Experience](#)

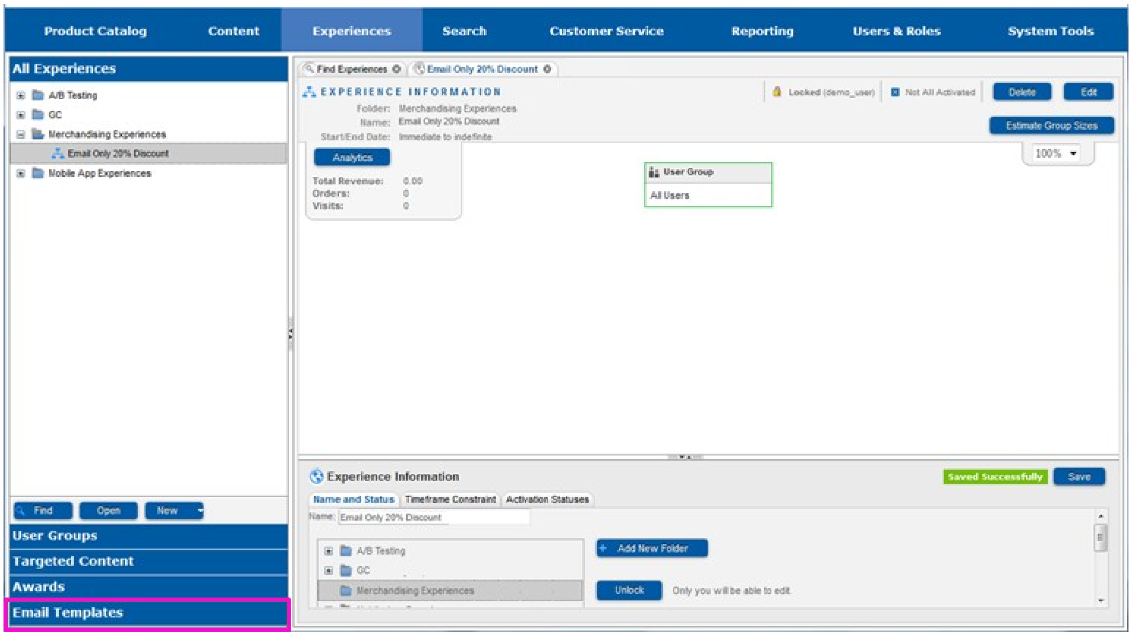
Home > Tutorials > Creating an Experience for a Promotion > Add an Email

Add an Email

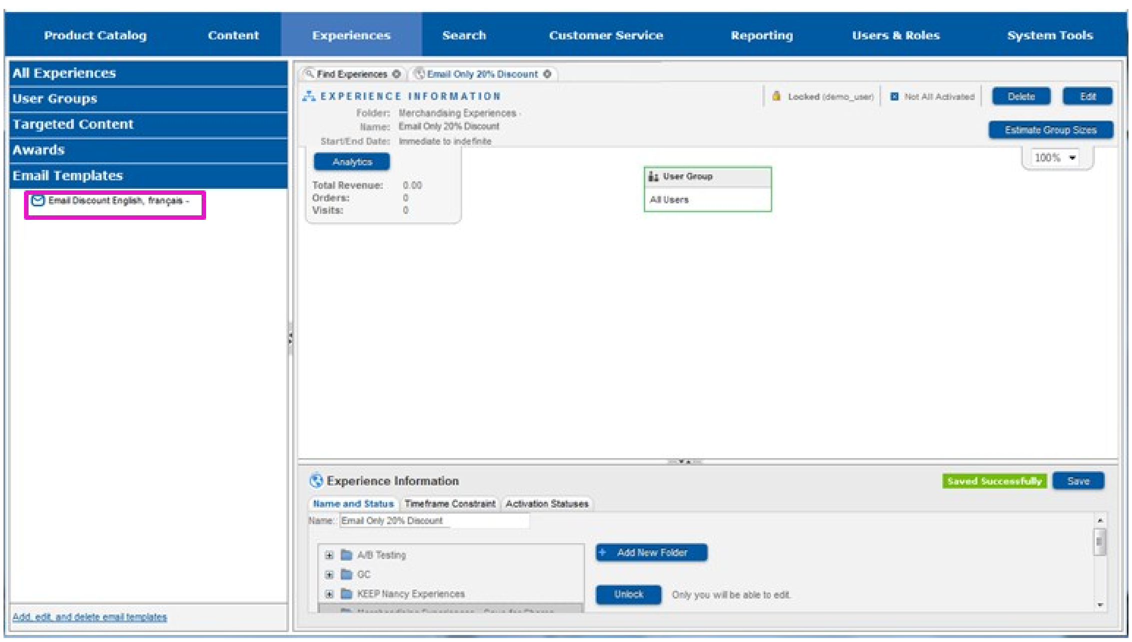
When experiences need the ability to send out emails, they do so through an email template. An email template is a starting point for the final email that is sent. Templates are meant to be customized after they are added to experiences.

The email created for this example will go to all users who have signed up to receive emails from the site. Emails are never sent to users who have opted out of email communications or have not registered their email addresses on the site.

⇒ Select the EMAIL TEMPLATES pane in the left-hand menu.



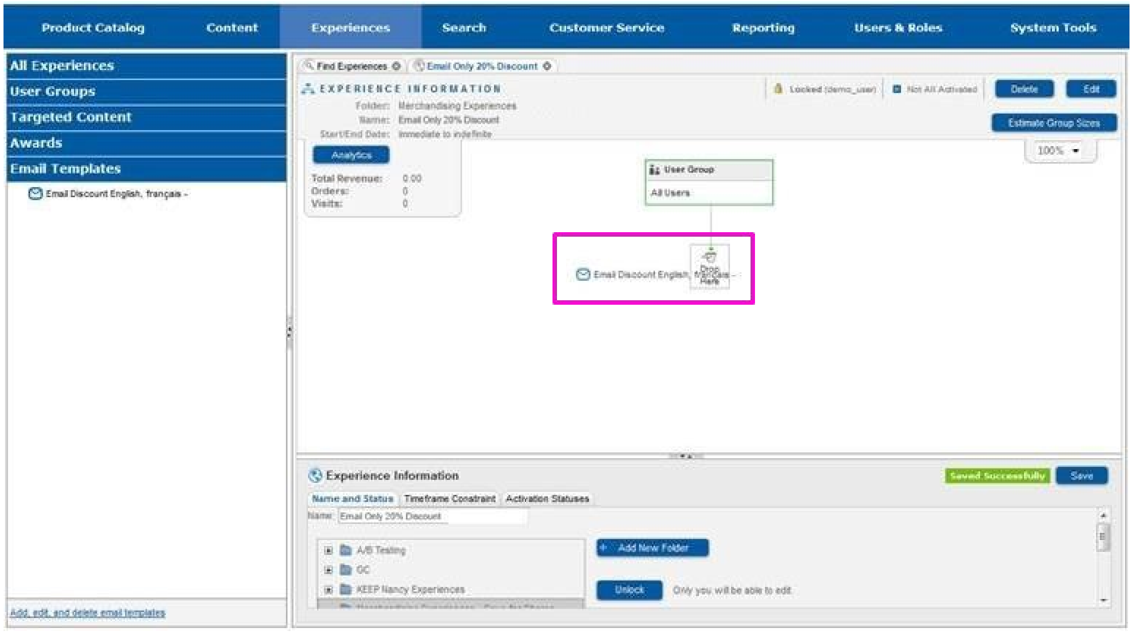
You will see the list of email templates that have been defined for the website.



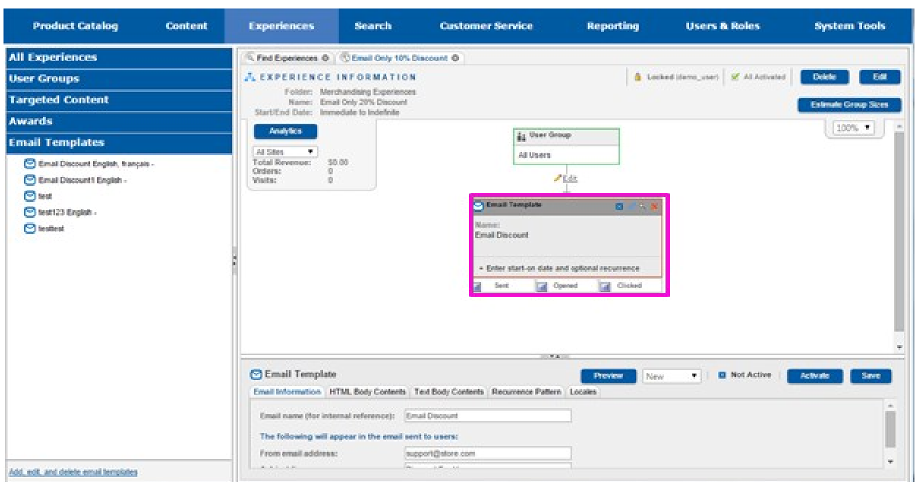
You will need to choose the email template that most closely matches the email you wish to send out.

⇒ Select the email template you will use and drag it into the right hand working pane. Do not lift the mouse key.

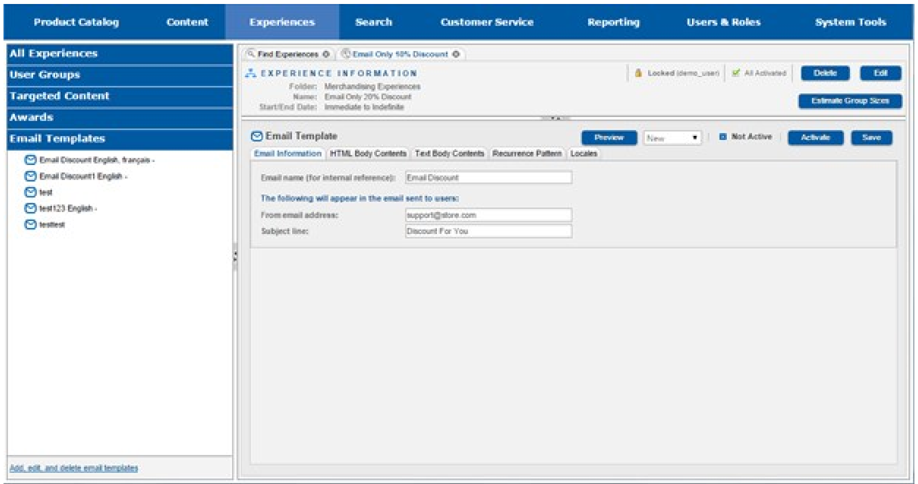
⇒ Lift the mouse key when the email template is on the DROP HERE box under the ALL USERS user group.



You will see a new box appear on the right hand work pane that represents the email template. The bottom of the right hand work pane will be filled in with the information that needs to be set for this template.

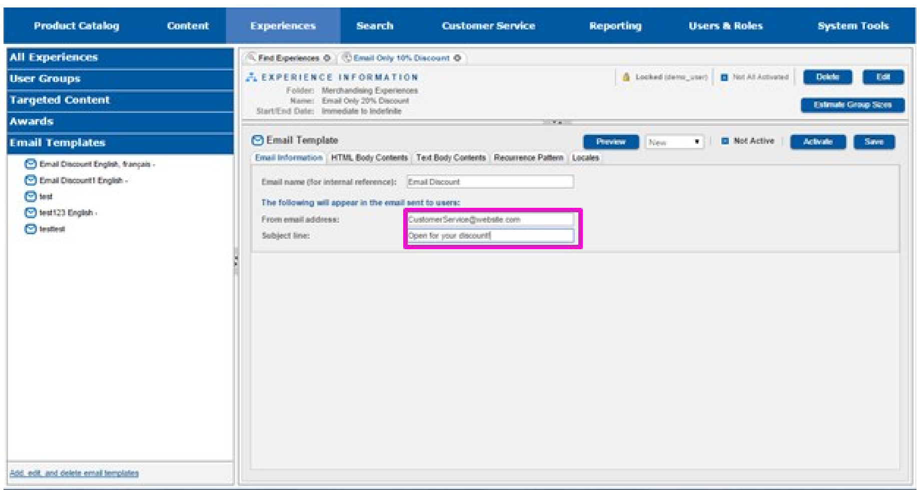


⇒ Select the divider between the top and bottom panes and move it up so that you can see the entire bottom portion of the pane.

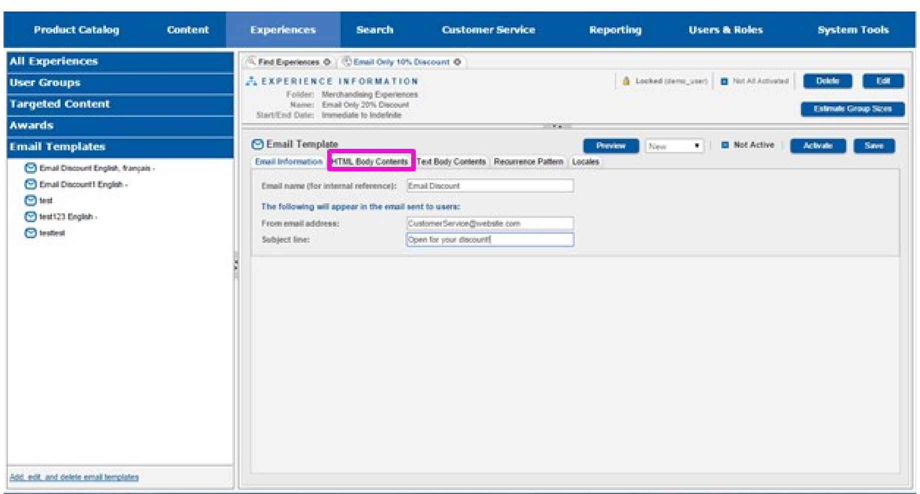


⇨ Enter the email address the email should be from in the FROM EMAIL ADDRESS text box.

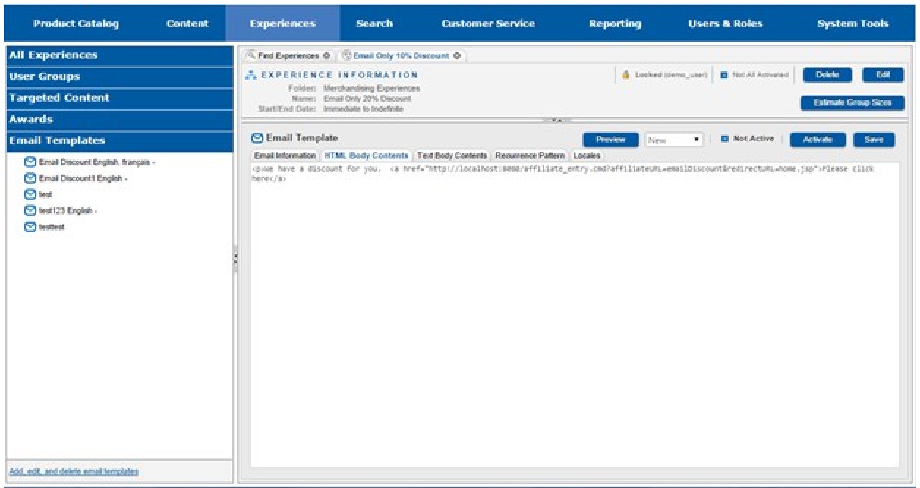
⇨ Enter the subject you want used for the email in the SUBJECT LINE text box.



⇨ Select the HTML BODY CONTENTS tab.

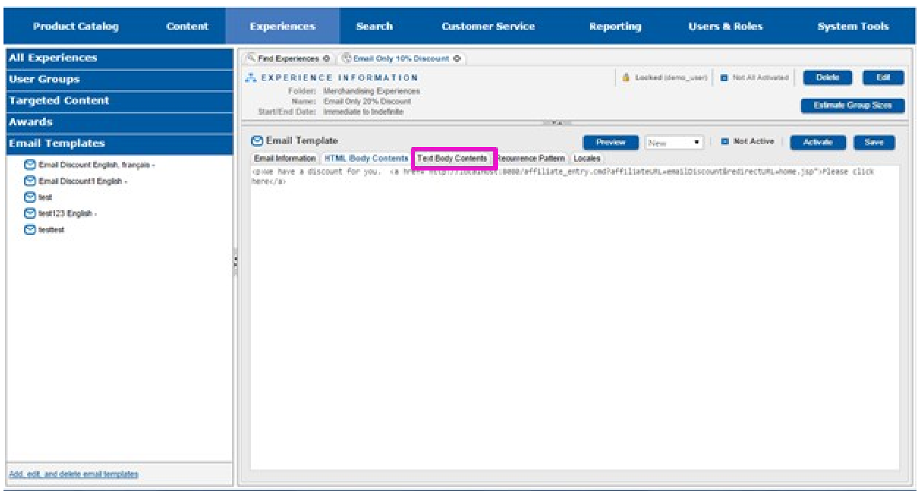


You will see the HTML version of the email body that is defined for the email template.

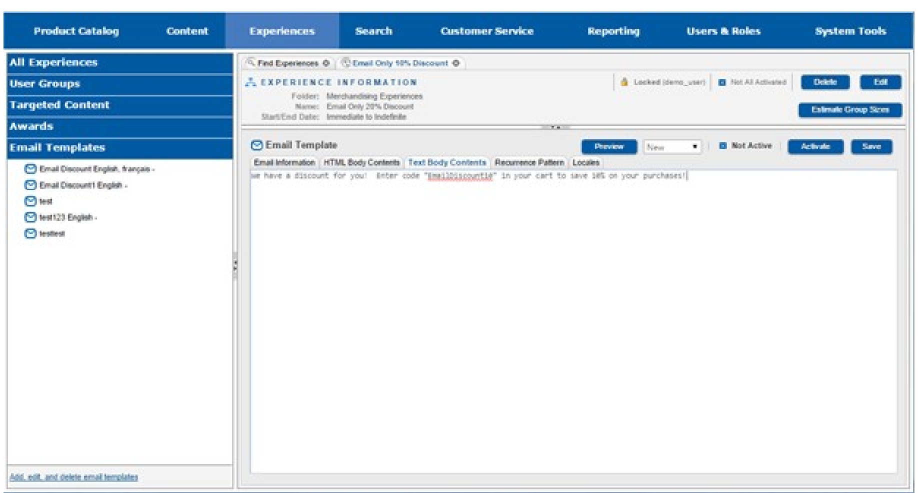


⇒ Modify the email body as necessary for your email.

⇒ Select the TEXT BODY CONTENTS tab.

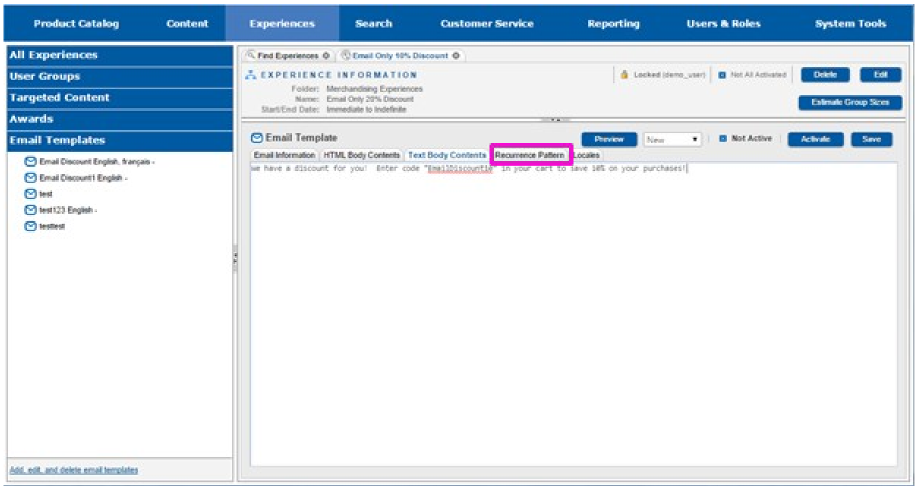


You will see the text version of the email body that is defined for the template.

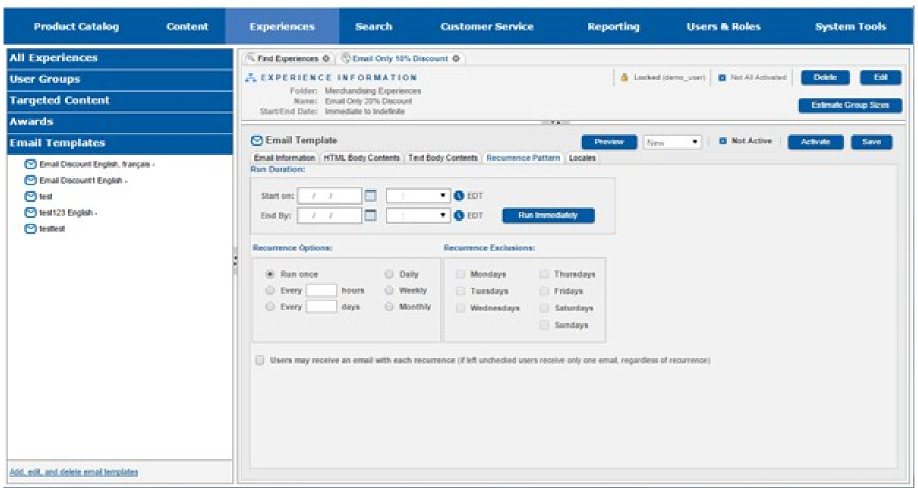


⇒ Modify the text version as necessary for your email. Remember that HTML tags are not allowed in the text version.

⇒ Select the RECURRENCE PATTERN tab.



You will see information that determines how frequently the email should be sent.



Emails should always have a start date assigned to them.

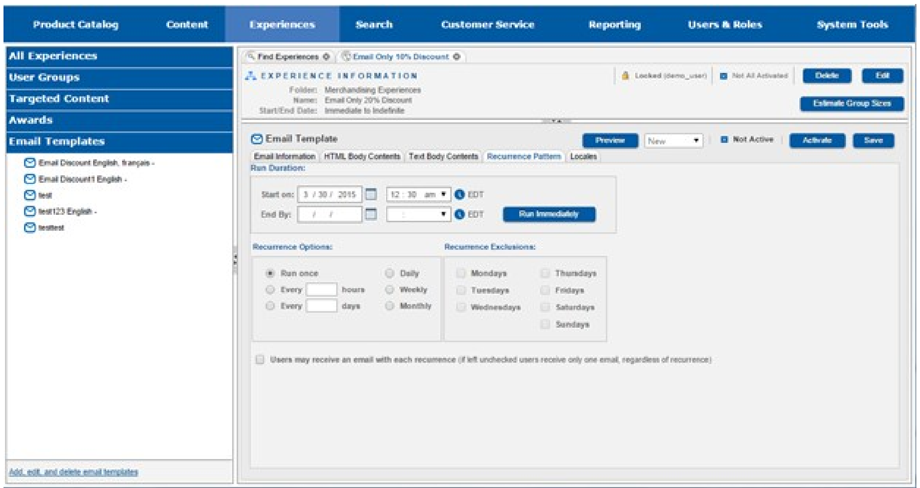
⇨ Enter the first date the email should be sent in the START ON field, or use the calendar icon to select a date.

⇨ If the email should not be sent after a particular date, enter an end date for sending it in the END BY field or use the calendar icon to select an end date.

⇨ Enter information in the RECURRENCE OPTIONS area that defines how often the email may be sent.

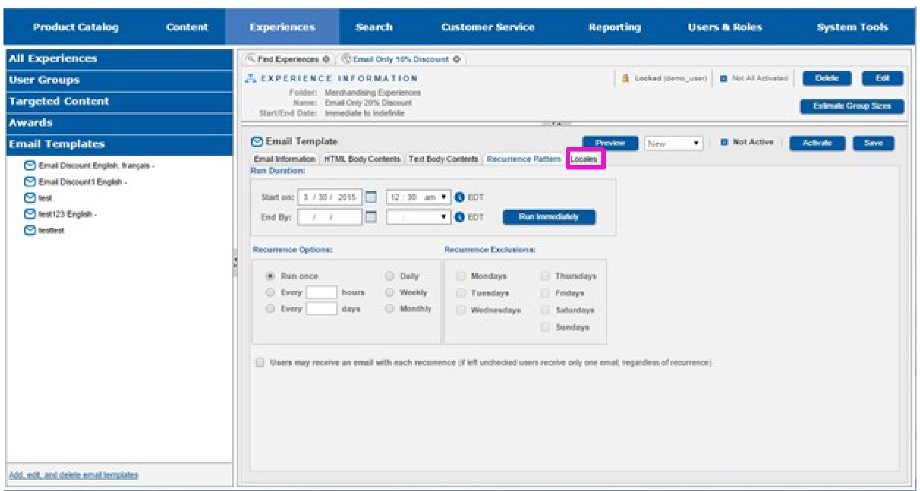
⇨ Select any days that the email may not be sent in the RECURRENCE EXCLUSIONS area.

⇨ Check the USERS MAY RECEIVE AN EMAIL WITH EACH RECURRENCE checkbox if you want users to be able to receive the email more than once.



If your site is an international site, you will see a "Locales" tab where you can set the locales the email template is valid for.

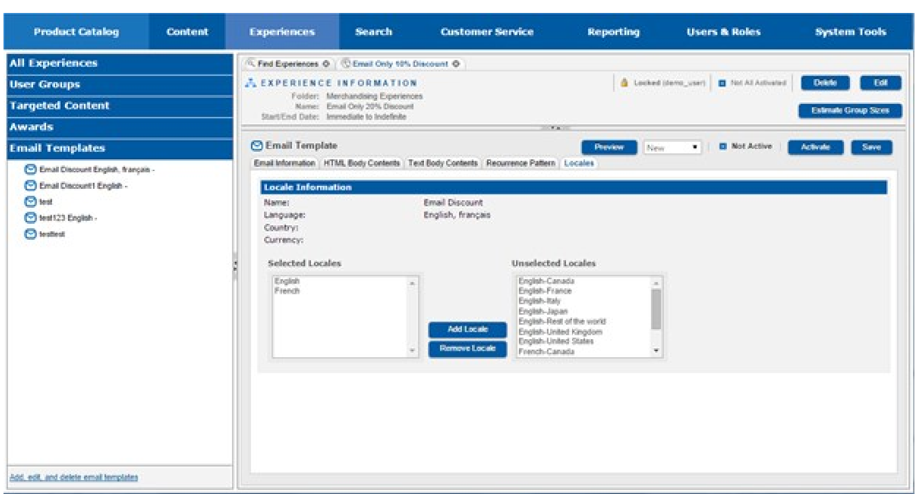
⇒ Select the LOCALES tab.



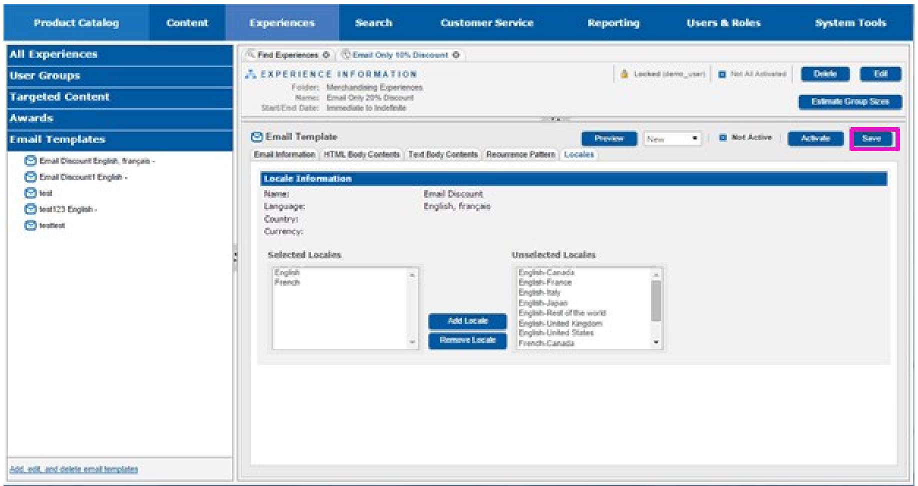
You will see information that defines which locales the email template is valid in.

⇒ Select a locale in the SELECTED LOCALES text box, then select REMOVE LOCALE to invalidate the email template in that locale..

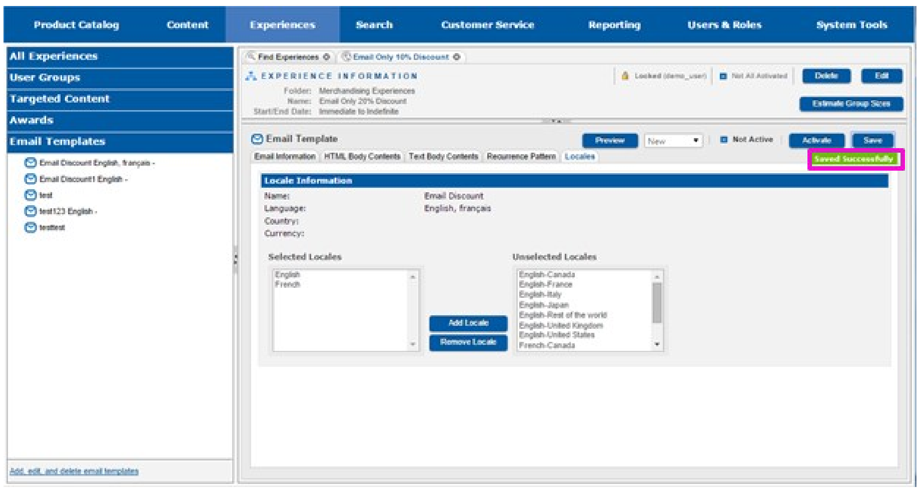
⇒ Select a locale in the UNSELECTED LOCALES text box, then select ADD LOCALE to make the email template valid in that locale..



⇒ Select SAVE.

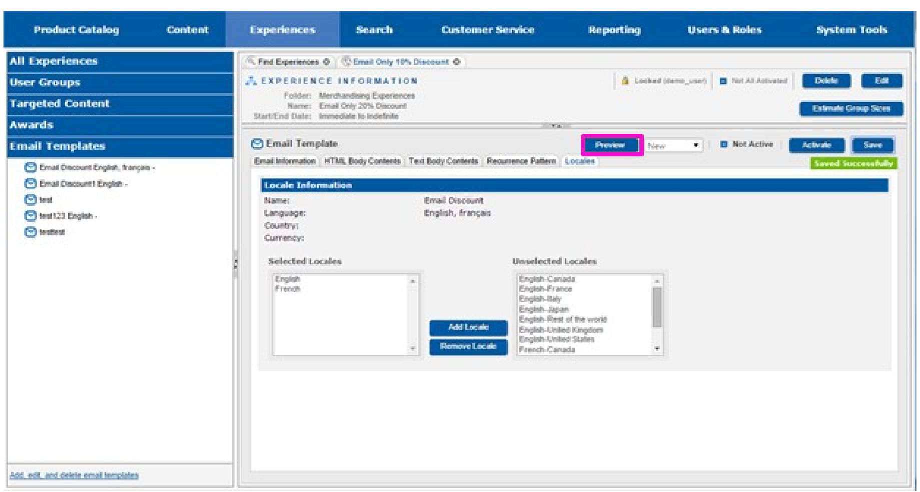


You will see a message that the save completed successfully.

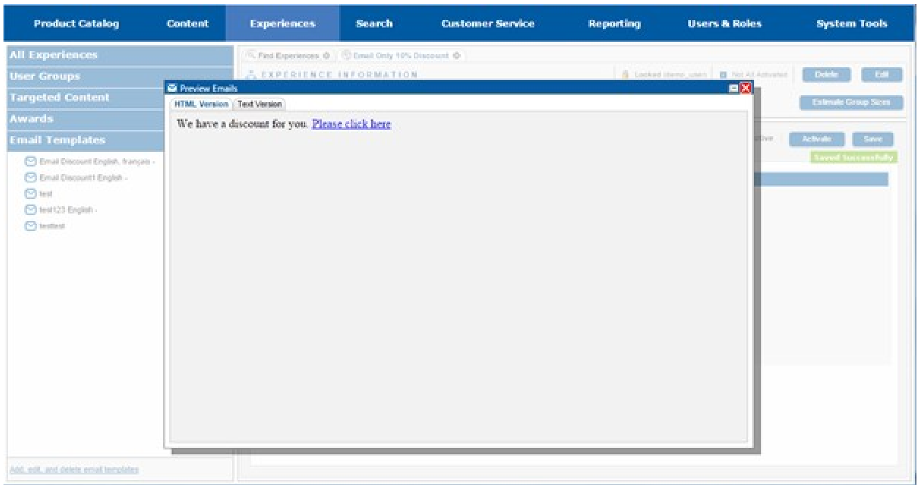


Once your changes have been saved, you should preview the email bodies to make sure they are as you desire.

⇨ Select PREVIEW.

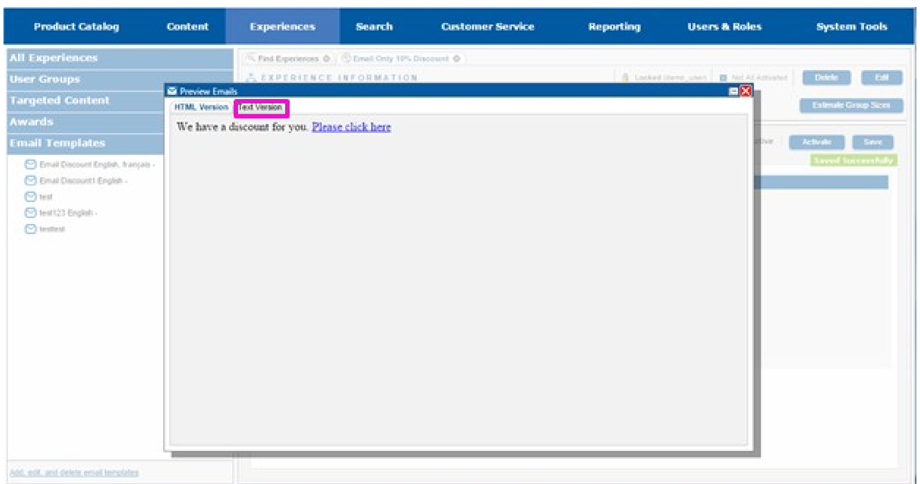


A new window will appear with two different tabs, one for the HTML version of the email body and one for the text version of the email body.

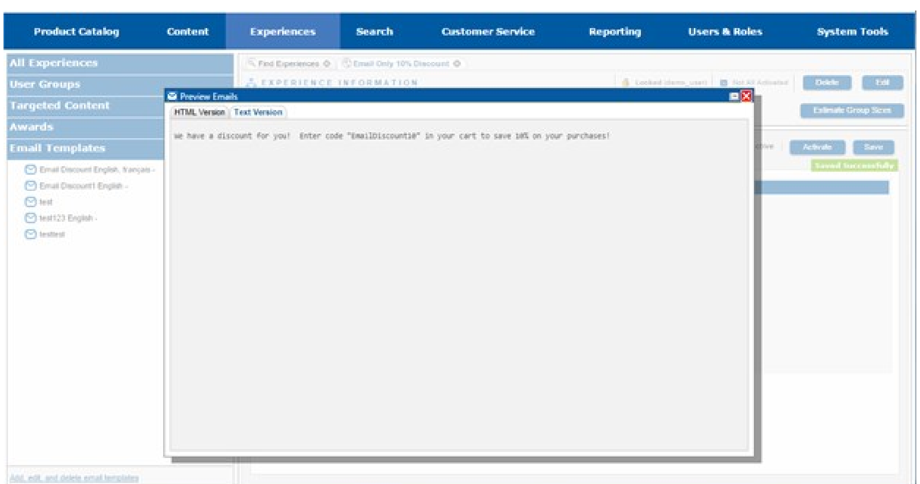


⇨ Preview the HTML version, making notes of any changes you want to make.

⇨ Select TEXT VERSION.



You will see the text version of the email body.



⇨ Preview the text version, making notes of any changes you want to make.

⇨ Select the close icon to dismiss the window.

⇨ Make any desired changes to the HTML version of the email body.

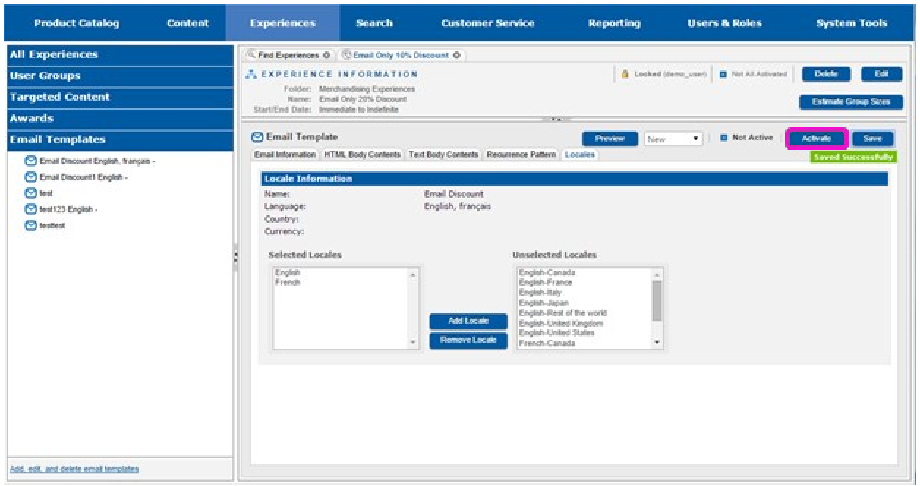
⇒ Make any desired changes to the text version of the email body.

⇒ Select SAVE to save your changes.

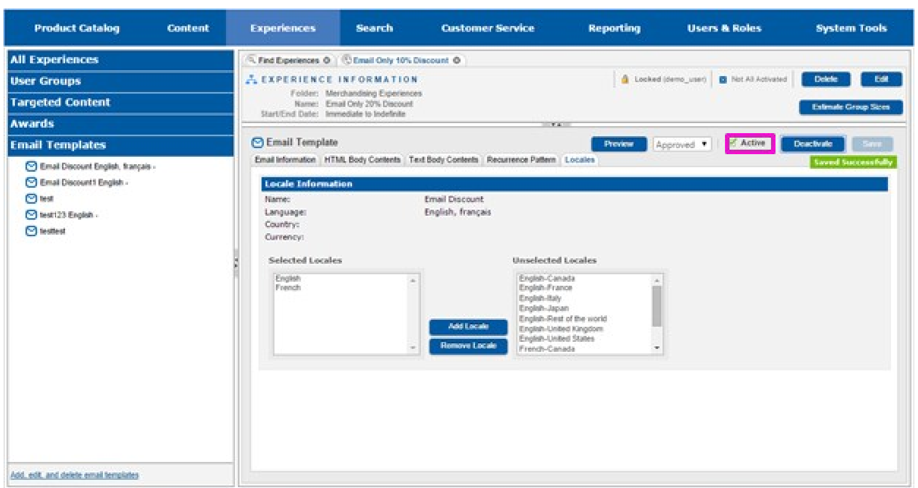
⇒ Select PREVIEW to preview your changes.

⇒ Repeat these steps until you are satisfied with the bodies of the email.

⇒ Select ACTIVATE to activate the email.

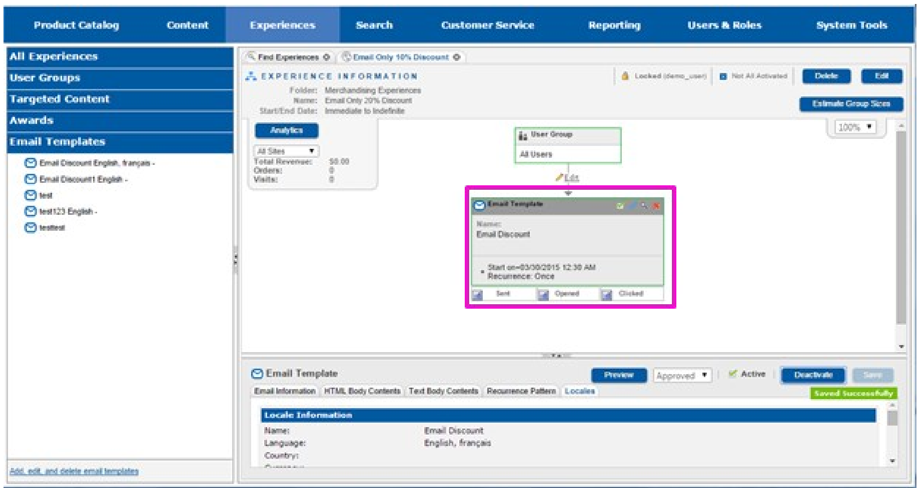


You will see that the activation status of the email changes from NOT ACTIVE to ACTIVE.



⇒ Slide the divider back down so that you can see the top portion of the right-hand work pane.

You will see that the outline for the email template box has turned green. This indicates that the email template was successfully modified and saved. The email is now considered active in the experience.



You will see three rectangles labeled SENT, OPENED, and CLICKED at the bottom of the email template box. These are connection points for additional components in the experience. If you want additional actions to occur once the email is sent, you connect components to the SENT connector. If you want additional actions to occur once the email is opened, you connect components to the OPENED connector. If you want additional actions to occur once a link in the email has been clicked, you connect components to the CLICKED connector. It is not necessary to have components connected to each connection.

See also

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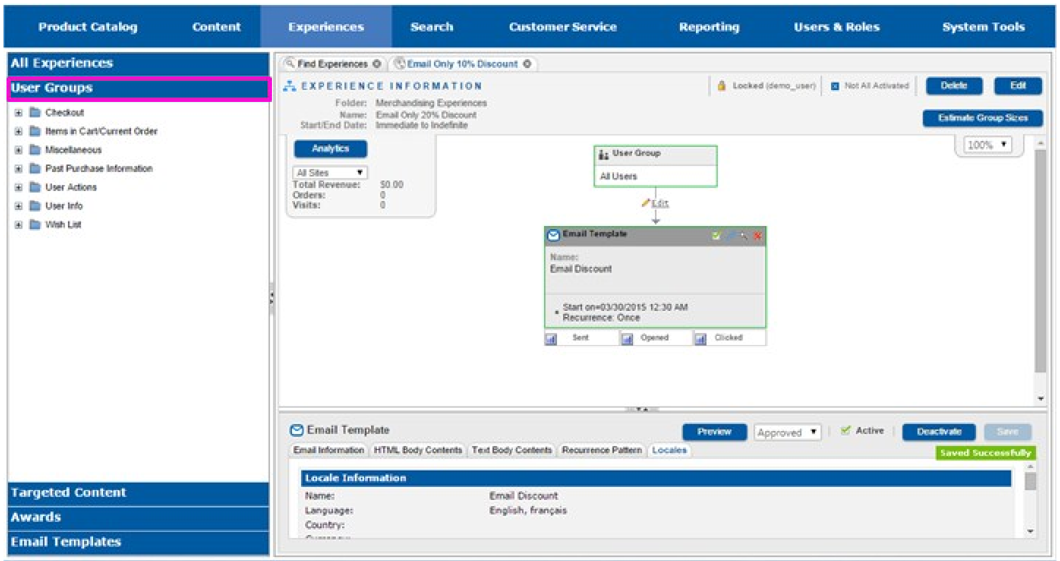
Add a User Group

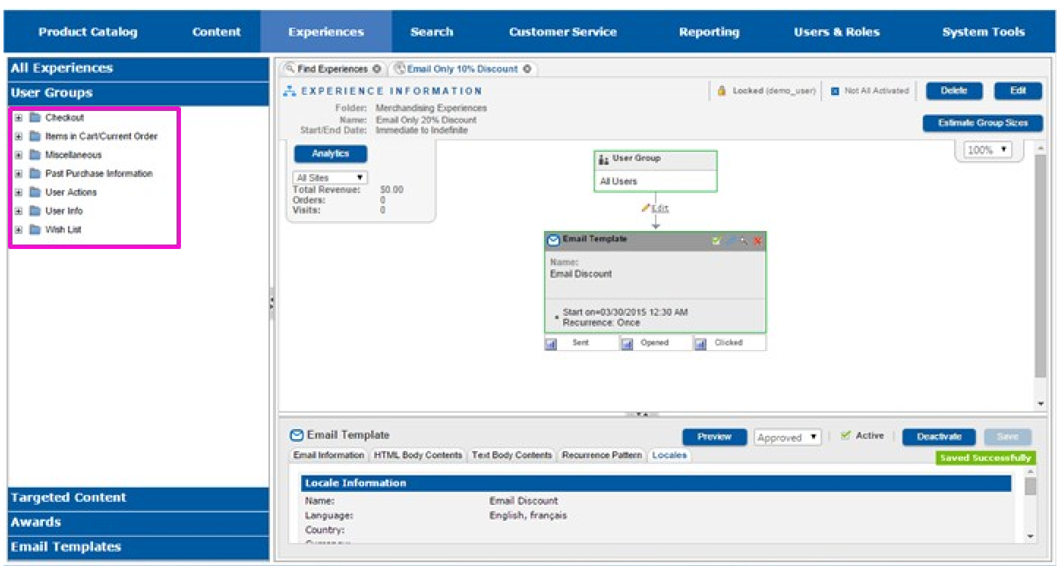
User groups are used to define which part of the group of visitors to a site the experience will apply to. A user group specifies a set of rules or activities that a visitor must meet before they can qualify for the rest of the experience. Each user group has different information that needs to be set for it; the information set below will not match the information needed for any other user group.

For this example, we will create a user group that segments visitors based on how they arrived at the site. If they arrived by clicking on the url included in their email or pasting into their browser, they will meet the requirements for the user group.

⇒ Select the USER GROUPS pane in the left-hand menu.

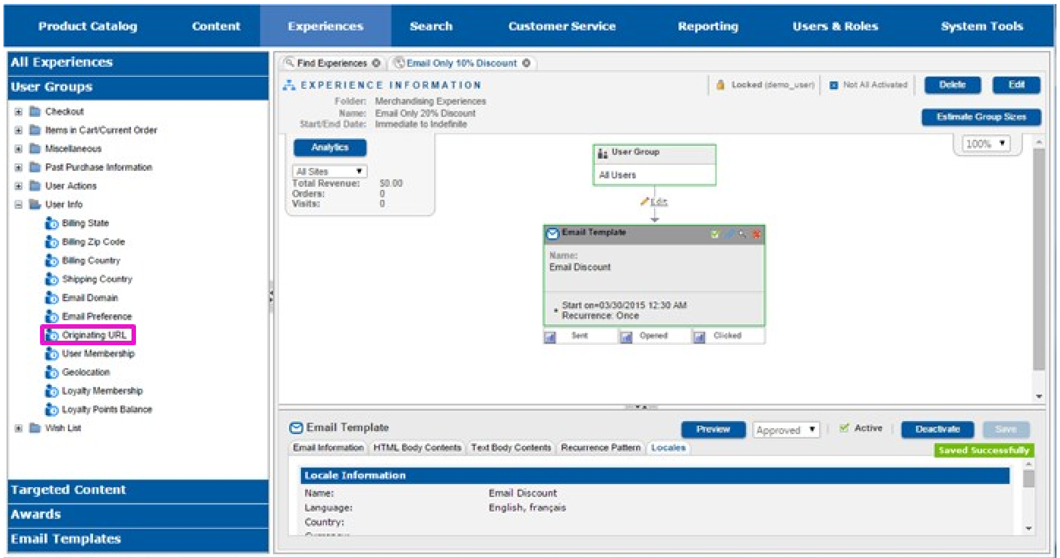


You will see a list of all of the folders containing user groups.



You will need to find the user group you want to use.

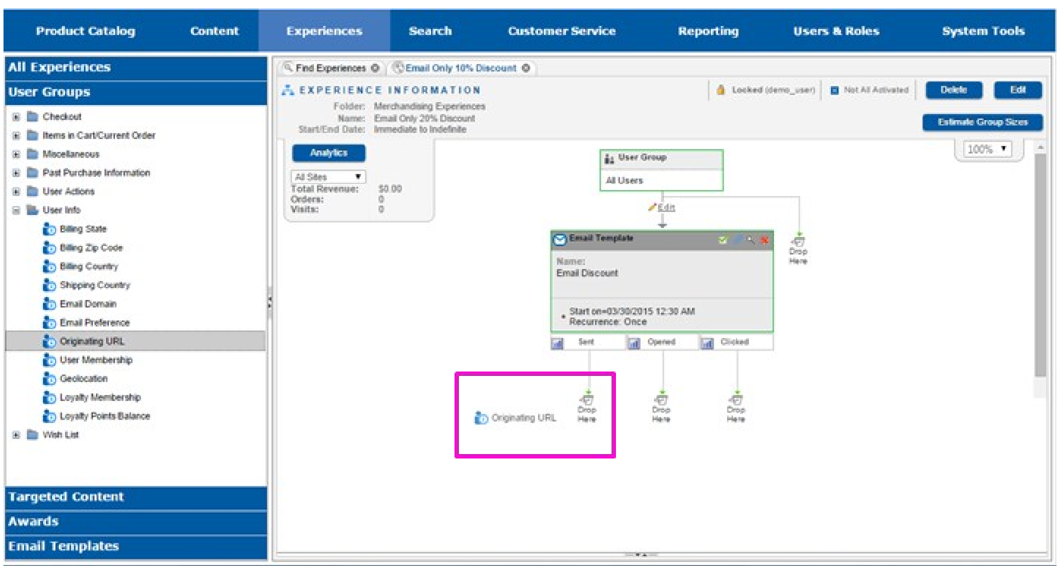
⇒ Select the plus (+) sign to the left of each group of user group, until you locate the user group you will use.



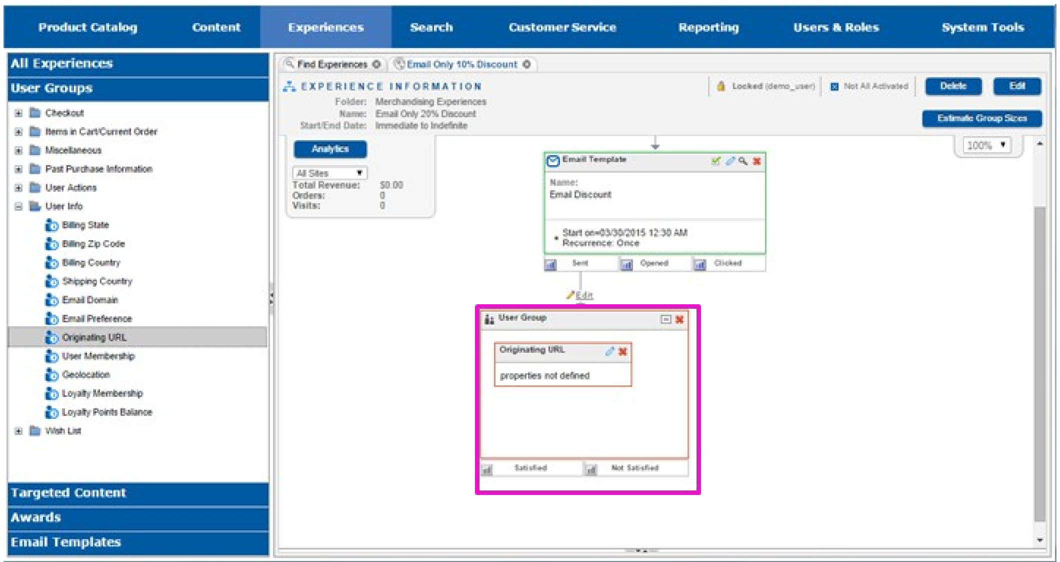
⇒ If necessary, move the divider so that there is space under the email template. You will need space to put the user group under it.

⇒ Select the user group and drag it into the right hand working pane. Do not lift the mouse key.

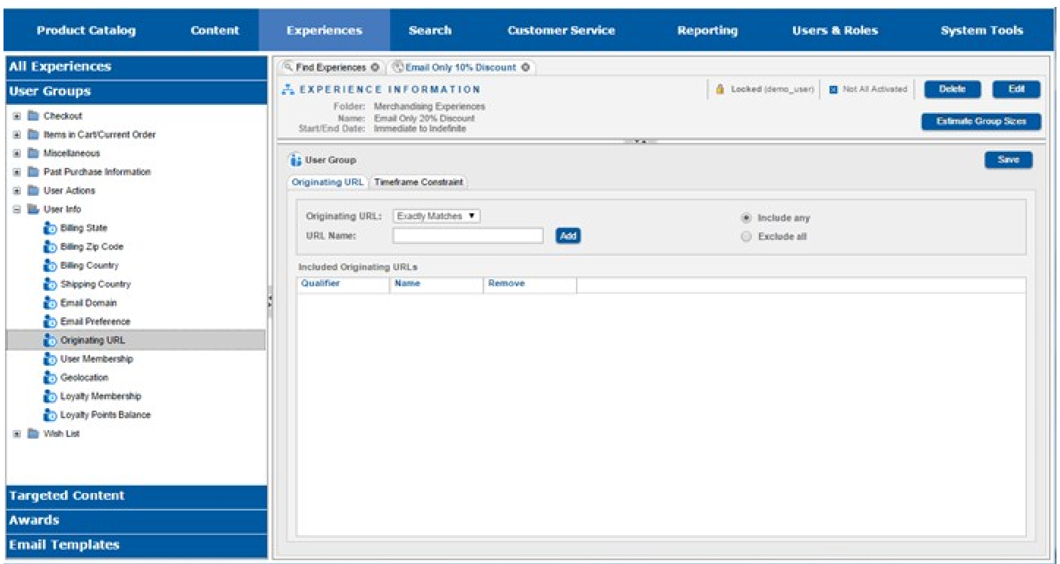
⇒ Lift the mouse key when the user group is on the DROP HERE box under the SENT connector of the email group.



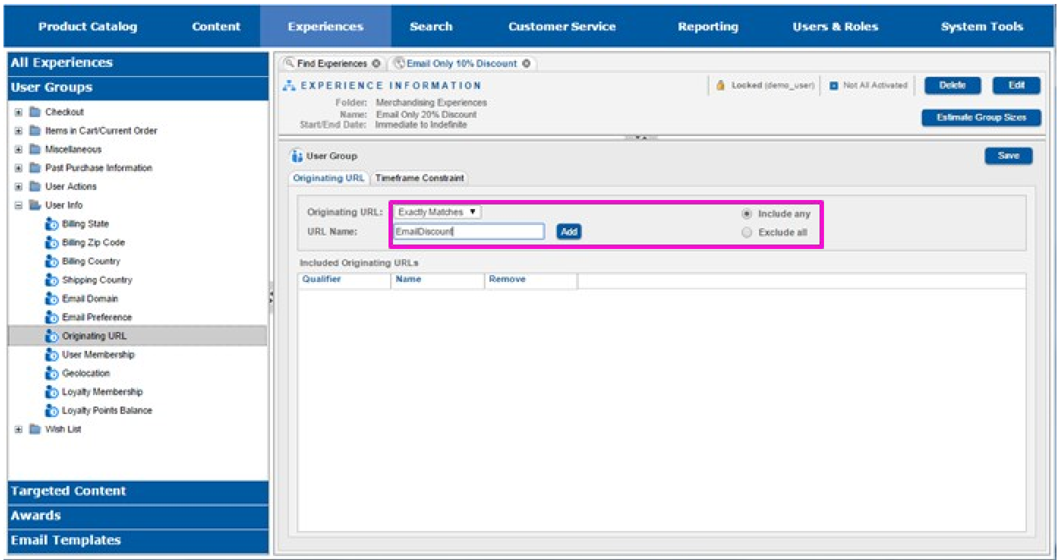
You will see a new box appear on the right hand work pane that represents the user group. The bottom of the right hand work pane will be filled in with the information that needs to be set for this user group.

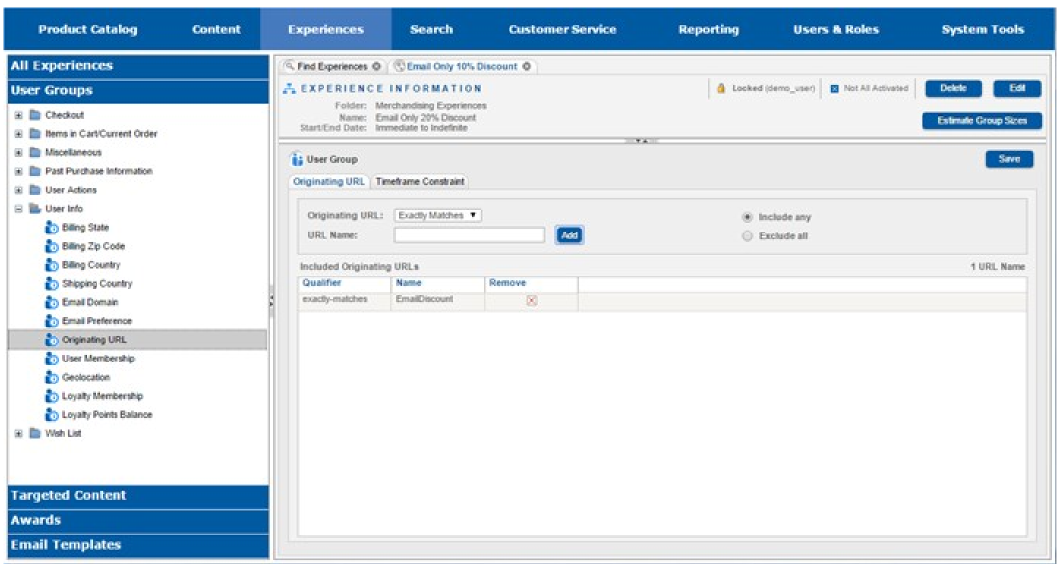


⇨ Select the divider between the top and bottom panes and move it up so that you can see the entire bottom portion of the pane.

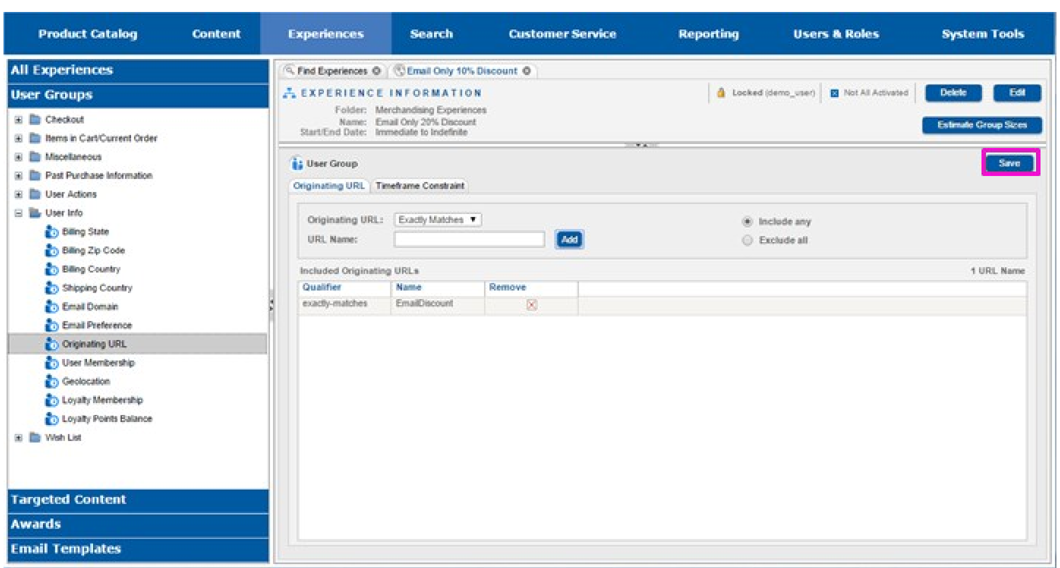


⇨ Enter the information needed to complete the user group. This will vary by user group.

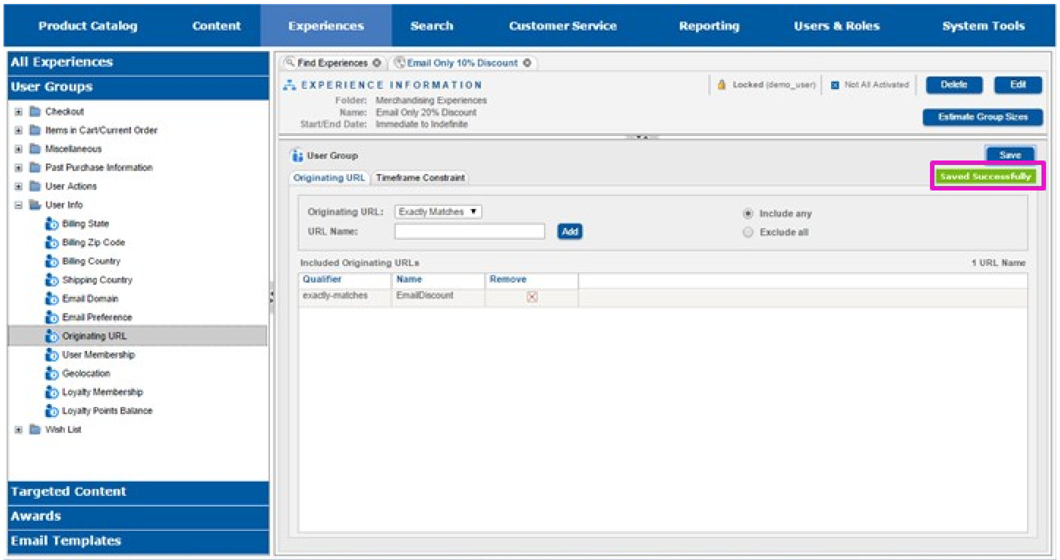




⇒ Select SAVE when you have entered all the information.

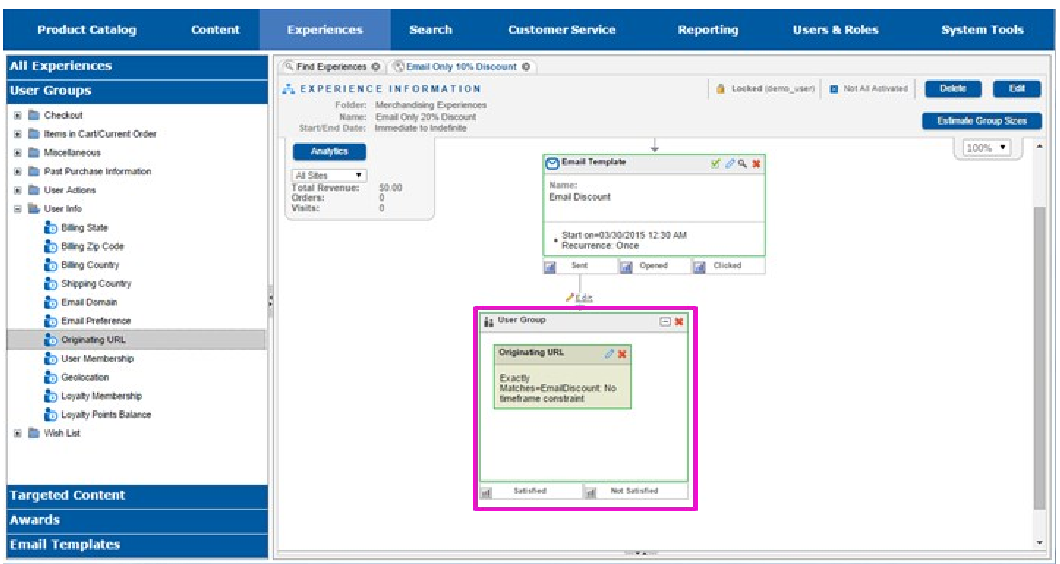


You will see a message that the save completed successfully.

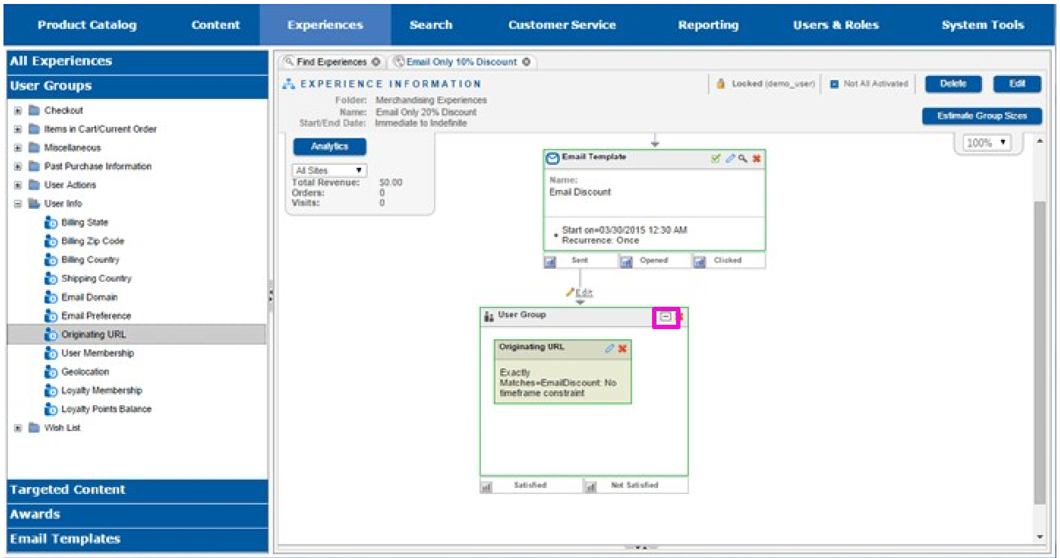


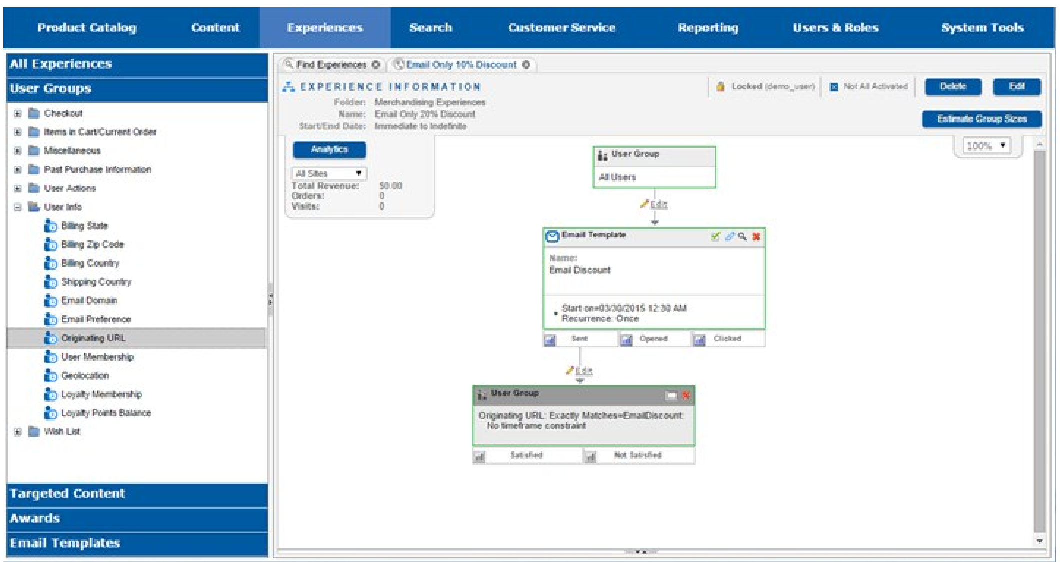
⇨ Slide the divider back down so you can see the top portion of the right-hand work pane.

You will see that the outline of the user group box has turned green. That means the user group was successfully filled in with information and saved. This user group is now considered active in the experience.



⇨ Select the collapse icon in the upper right corner of the user group box to collapse the user group and create more space on the screen.





You will see two rectangles labeled SATISFIED and NOT SATISFIED at the bottom of the user group box. These are connection points for additional components in the experience. If a visitor to the site fulfills the requirements of the user group, they will be eligible for whatever action is connected to the SATISFIED connection. If they do not satisfy the requirements, they will be eligible for whatever action is connected to the NOT SATISFIED connection. It is not necessary to have components connected to each connection. If, for example, nothing should happen if the visitor does not meet the requirements of the user group, then nothing needs to be connected to the NOT SATISFIED connection.

See also

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Add an Email
Add Targeted Content
Add an Award
Set the Time Frame
Result: the Entire Experience
Optional: Testing the Experience

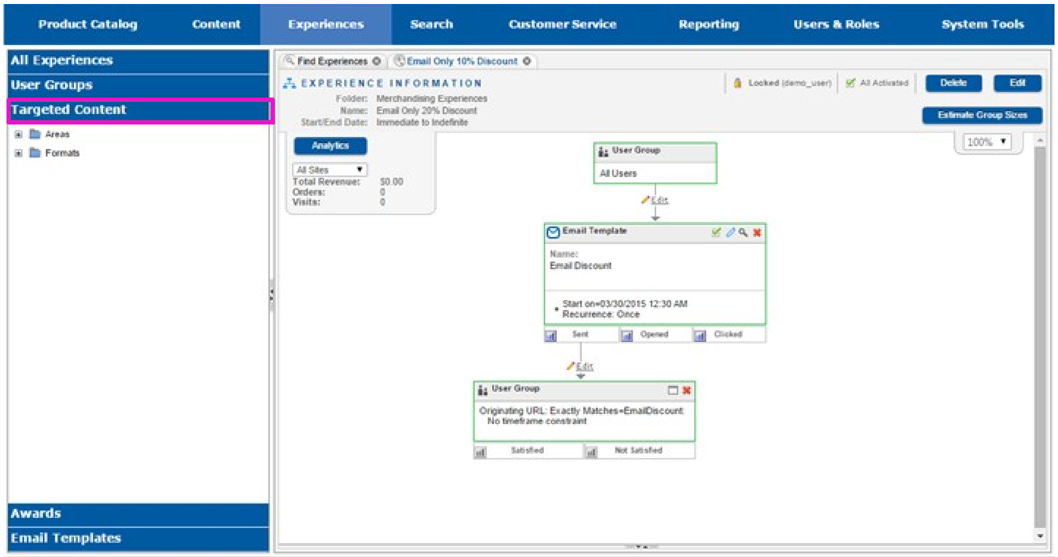
Home > Tutorials > Creating an Experience for a Promotion > Add Targeted Content

Add Targeted Content

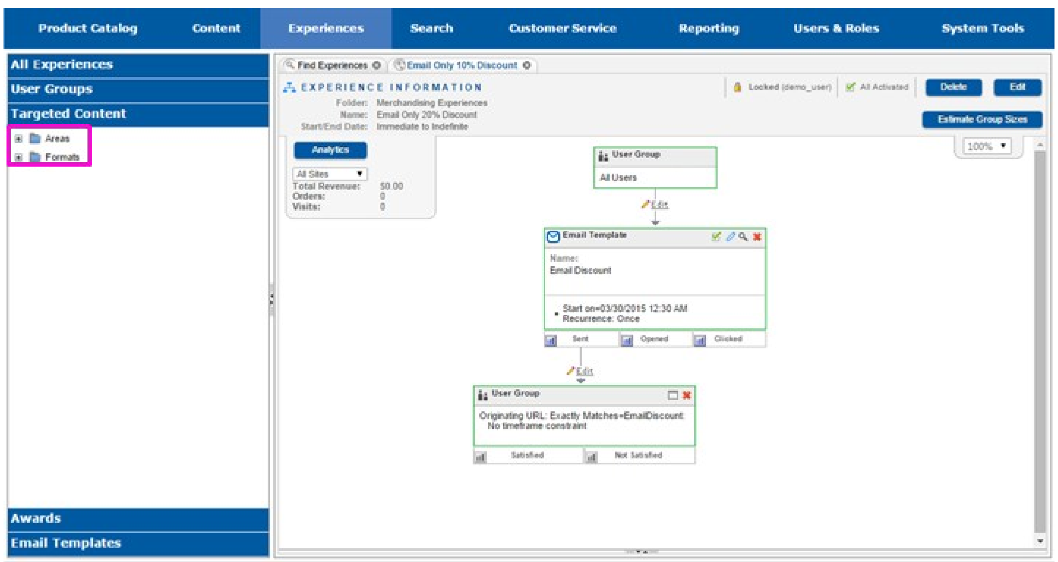
Targeted content is content that is intended to be different for different visitors to the site. Targeted content can only appear on areas of pages that have been defined to contain target content.

For this example, special content will appear on the home page if the visitors have come to the site from the url in the email message.

⇨ Select the TARGETED CONTENT pane in the left-hand menu.



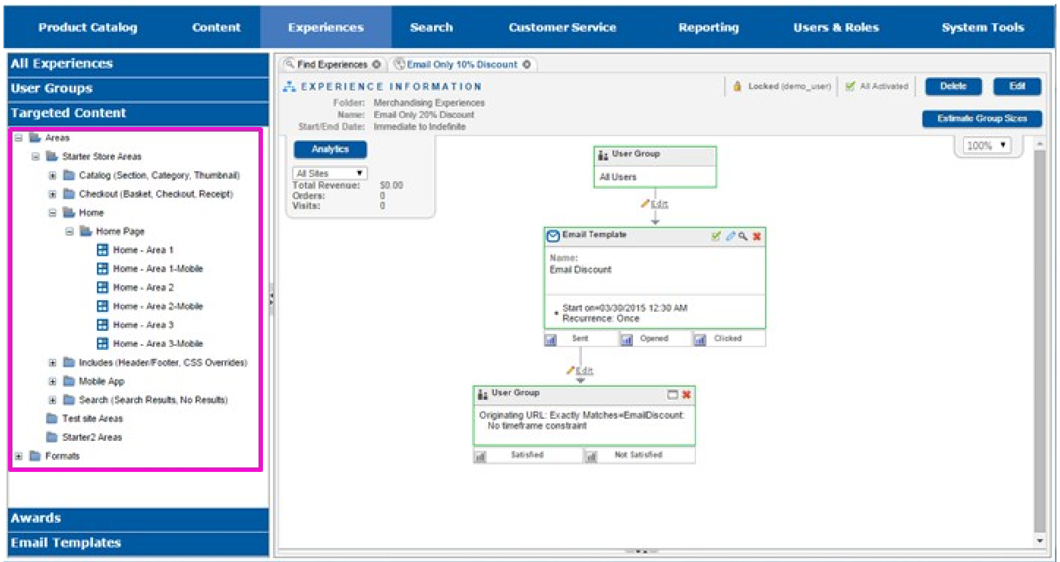
You will see a folder that contains a list of the areas that have been defined to allow targeted content, and a folder with a list of formats that can be used for content.



You can create targeted content by selecting an item under either folder. Both the area and the format need to be specified for targeted content, but you can start with whichever list you prefer. For this example, we will begin by picking the area the targeted content should appear in.

⇨ Select the plus (+) sign to the left of the AREAS entry.

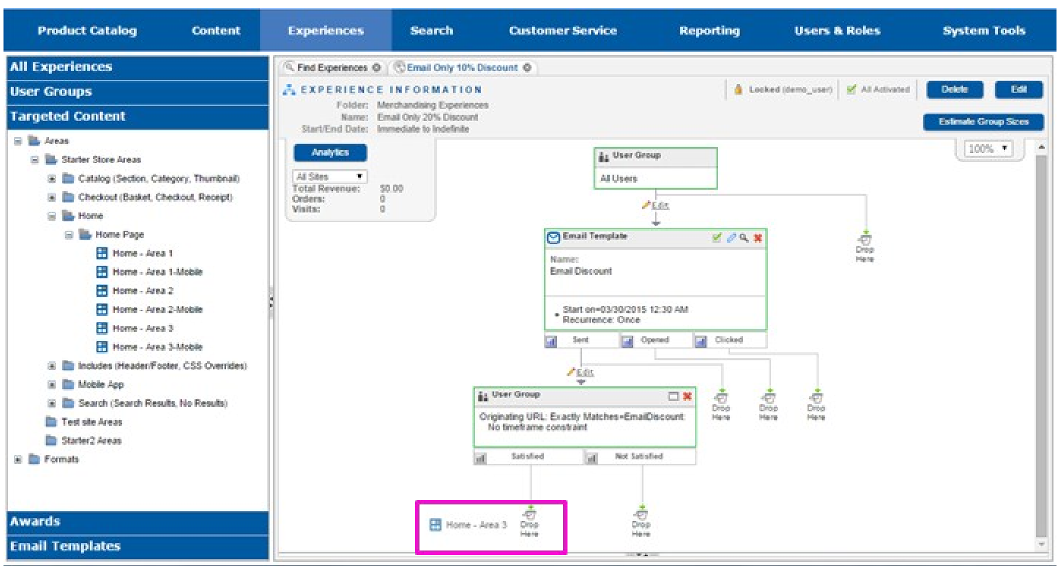
⇨ Continue clicking on the plus sign until you can see the page and area you want the targeted content to appear in.



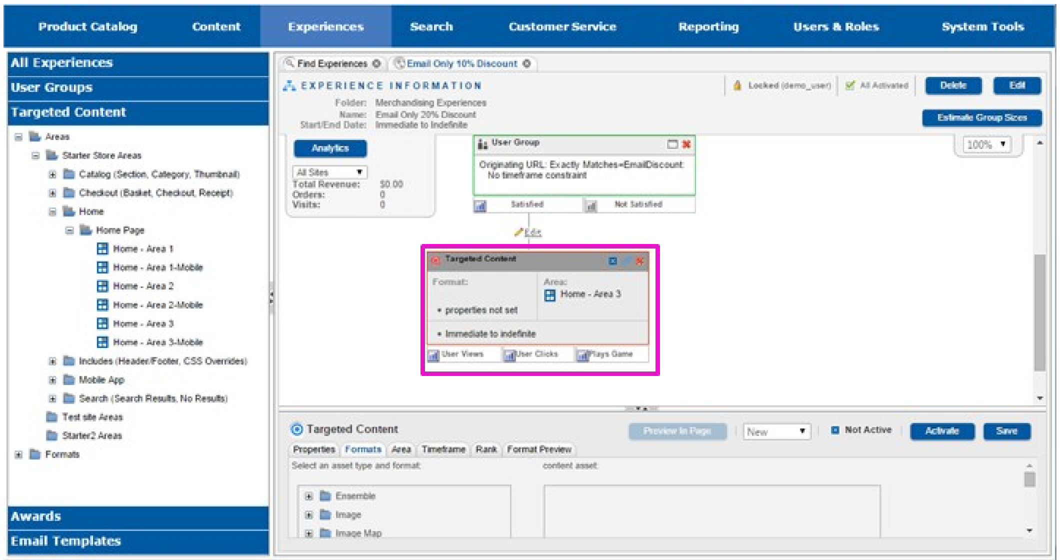
⇒ If necessary, move the divider so that there is space under the user group. You will need space to place the targeted content under it.

⇒ Select the area for the targeted content and drag it into the right hand work pane. Do not lift up the mouse key.

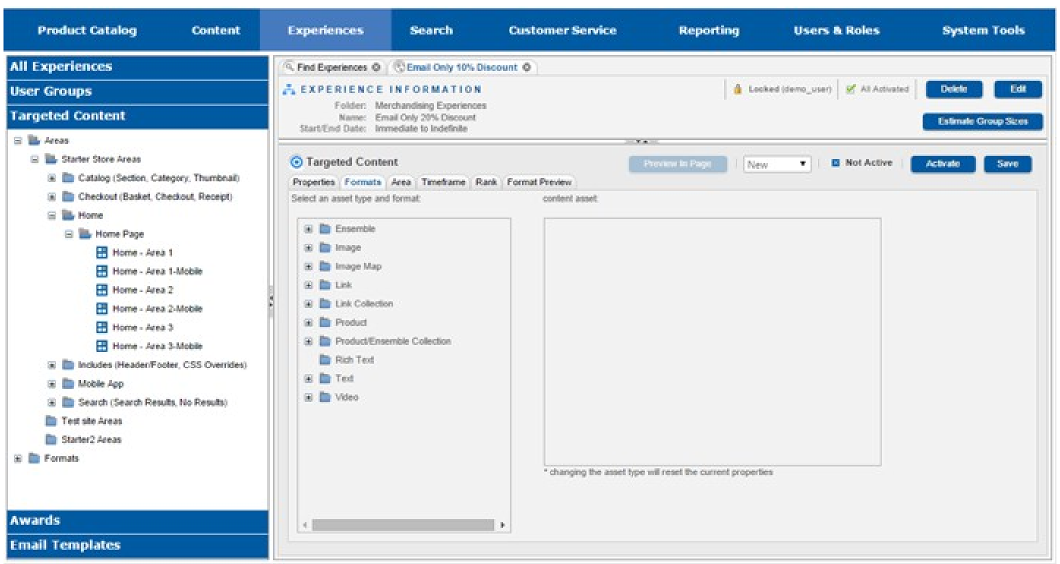
⇒ Lift up on the mouse key when the area is on the DROP HERE box under the SATISFIED connection point of the user group.



You will see a new box appear on the right hand work pane that represents the targeted content. The bottom of the right hand work pane will be filled in with information that needs to be set for this targeted content.



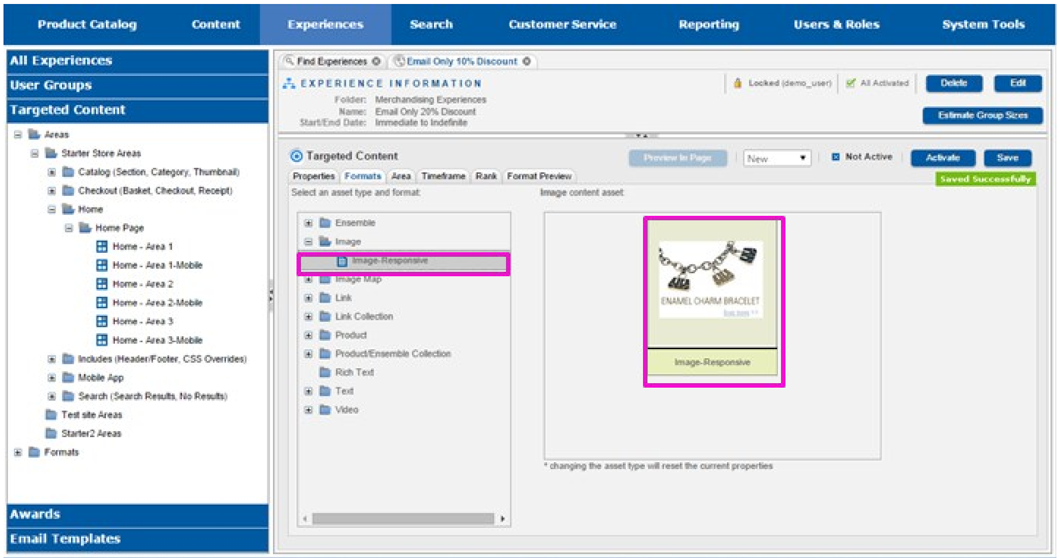
⇒ Drag the divider up so that you can see the entire bottom work pane.



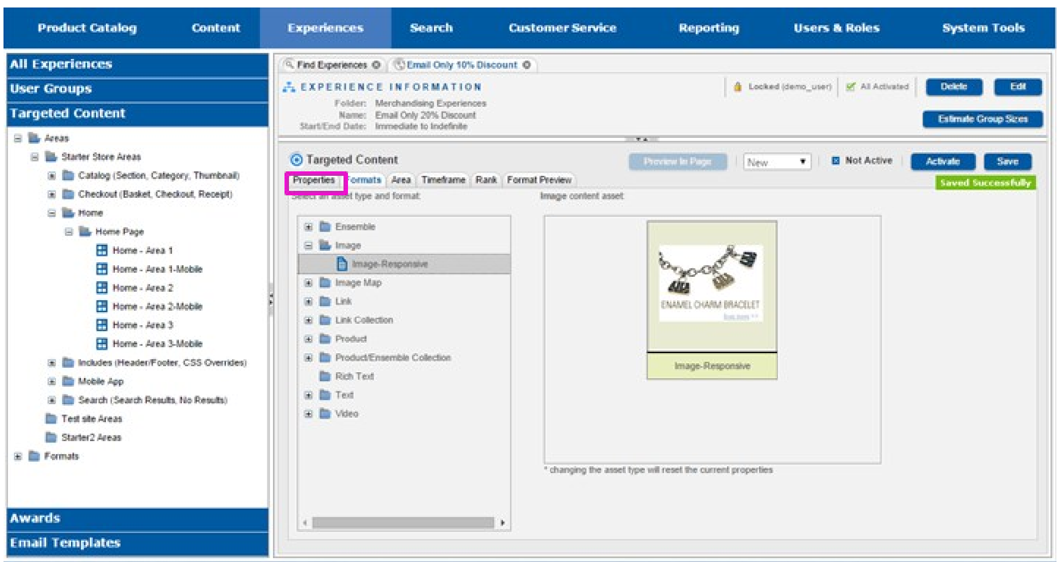
⇒ Click on the plus (+) signs in the SELECT AN ASSET TYPE AND FORMAT list box until you can see the asset type and format you want to use for the target content.

⇒ Select the asset type and format you will be using.

You will see a sample asset using the format you selected in the right hand preview window.



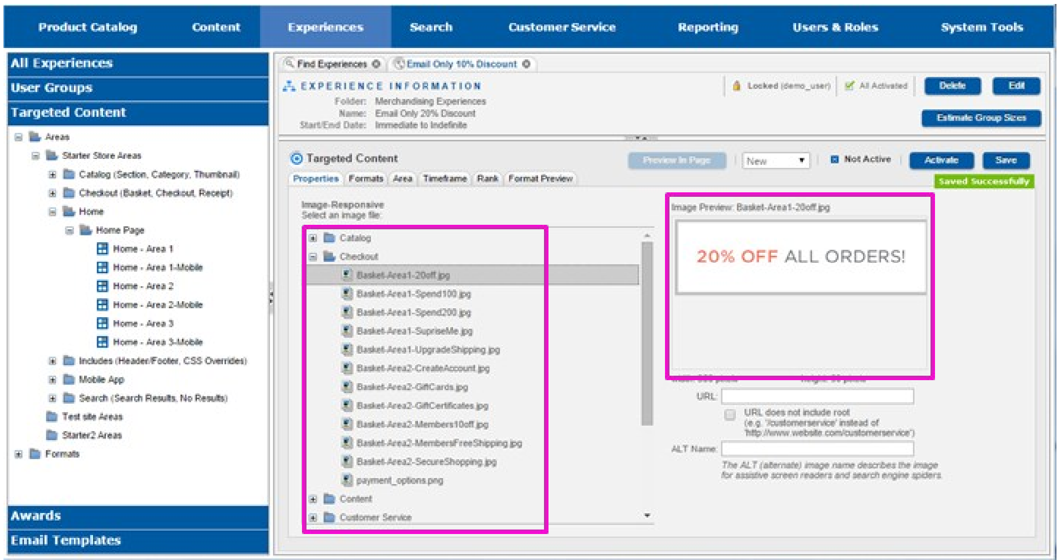
⇨ Select the PROPERTIES tab.



⇨ Click on the plus (+) signs in the left hand selection box until you can see the asset you want to use.

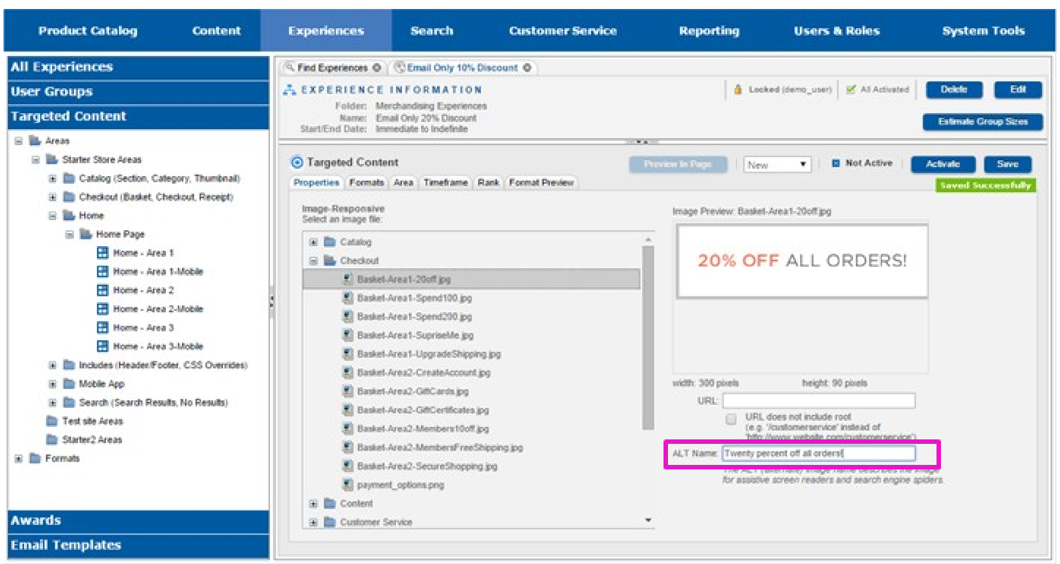
⇨ Select the asset you will be using.

You will see a preview of the asset on the right hand side.

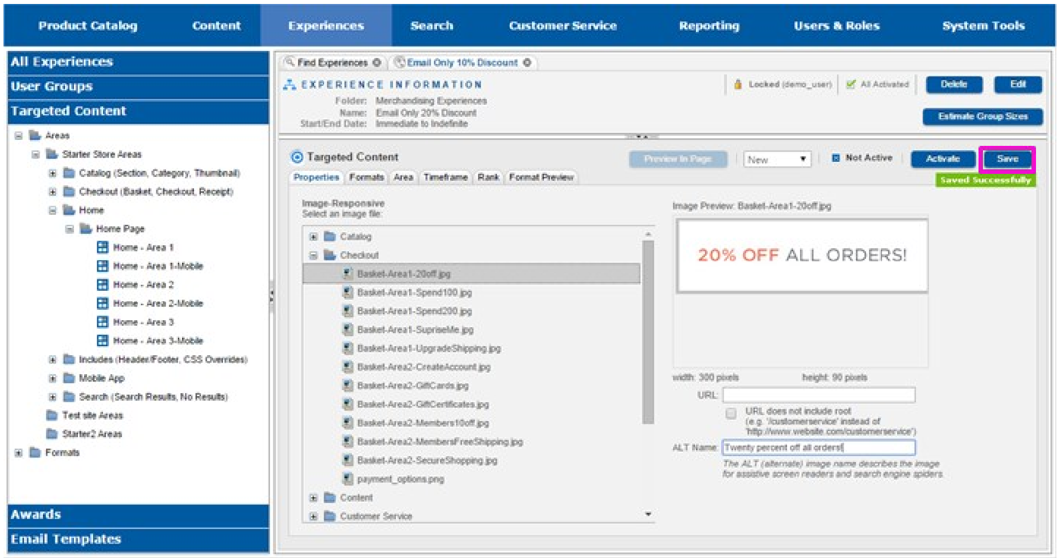


For some assets, alternate names need to be added. Alternate names are used for assistive screen readers and should contain text that describes the asset.

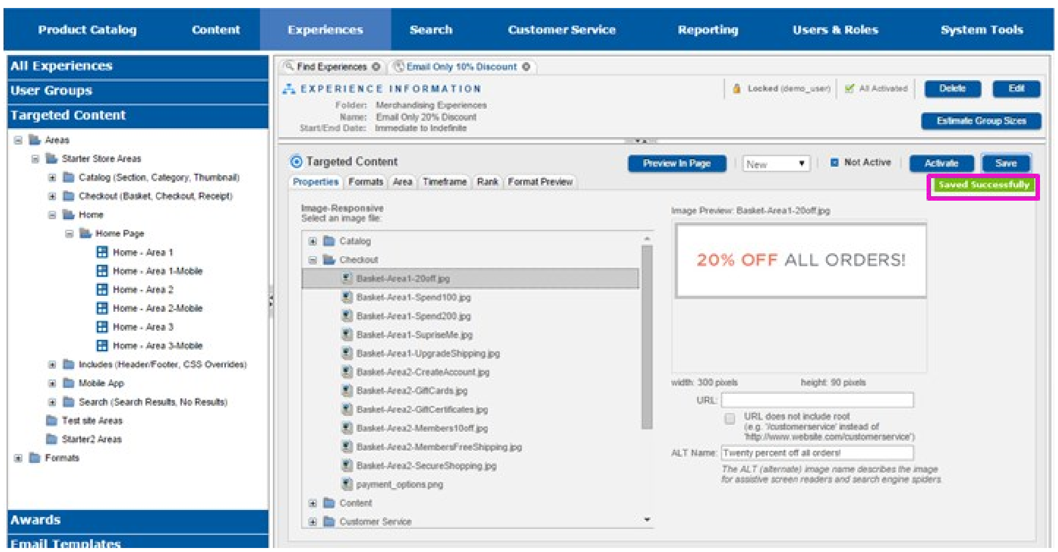
⇒ If necessary, enter an alternate name for the asset.



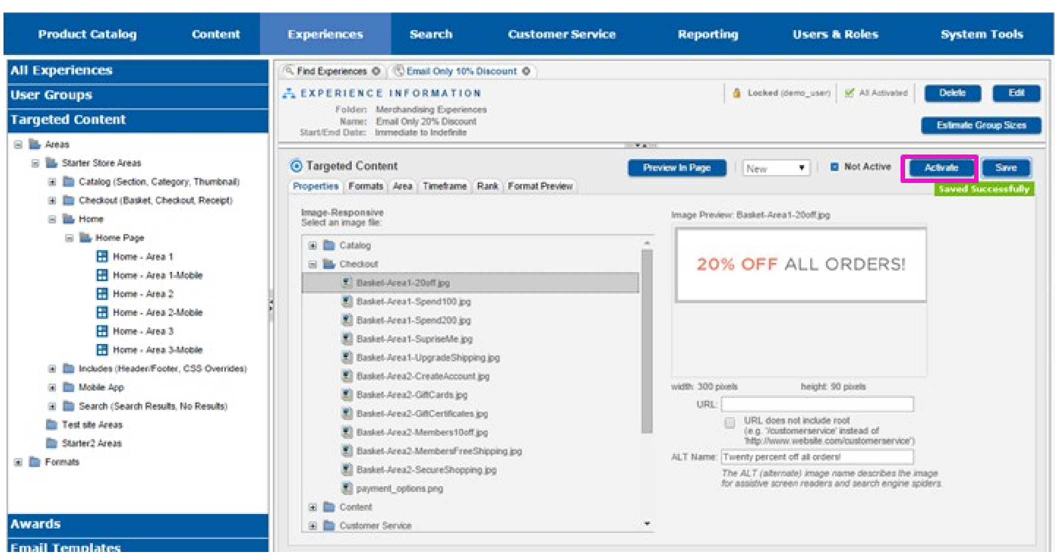
⇒ Select SAVE to save your choices.



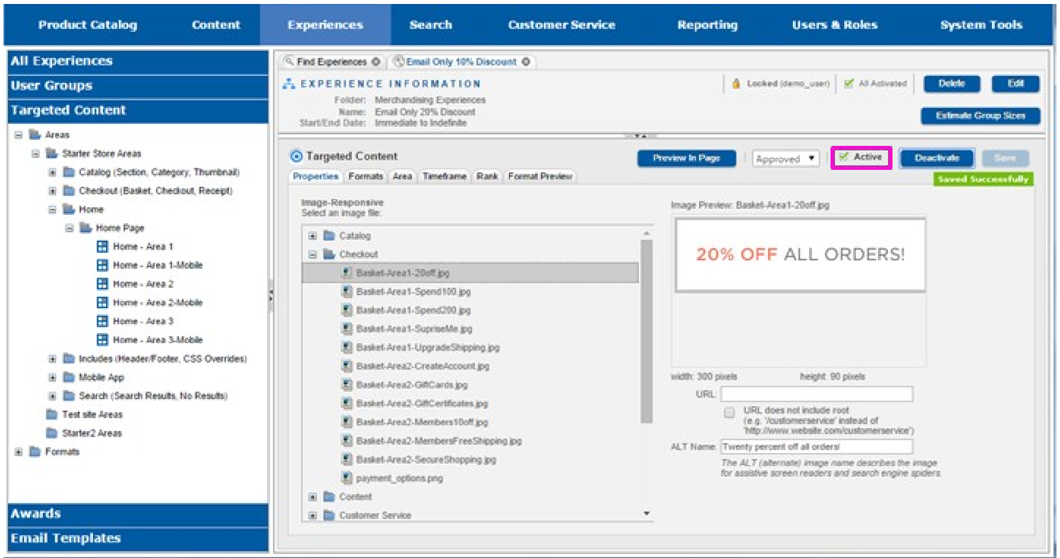
You will see a message indicating your save was successful.



⇒ Select ACTIVATE to activate the targeted content.

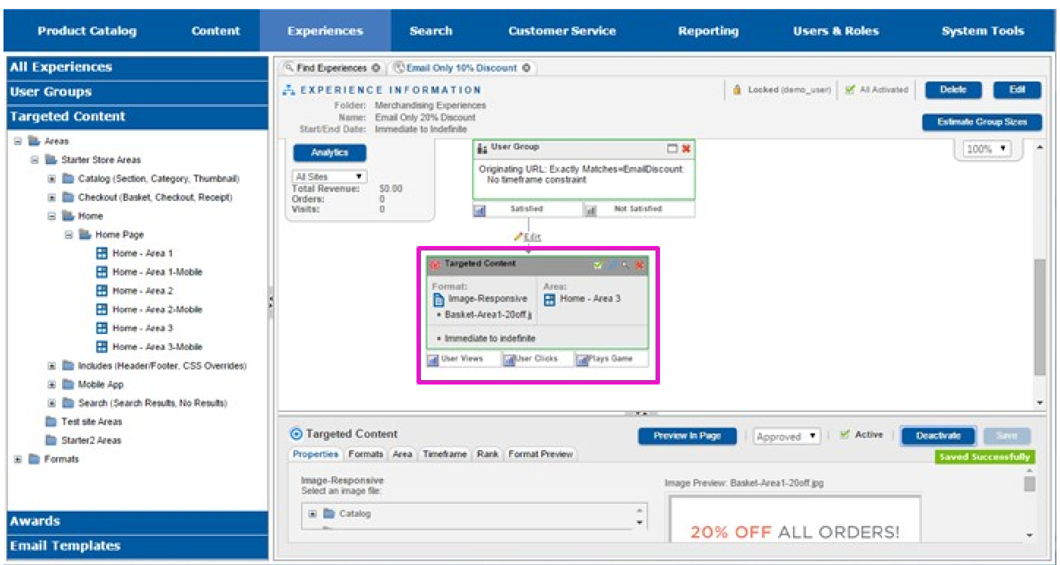


You will see that the active status of the targeted content has gone from NOT ACTIVE to ACTIVE.



⇨ Move the divider down so you can see more of the top half of the pane.

You will see that the outline of the box for the targeted content has turned green. This means the targeted content has been completely defined, and saved. The targeted content is considered active in the experience.



Under the targeted content component you will see two rectangles, USER VIEWS and USER CLICKS. These are connection points for additional components in the experience. If you want additional actions occur if the targeted content is displayed, you connect components to the USER VIEWS connector. If you want to additional actions to occur if a link in the targeted content is selected, you connect components to the USER CLICKS connector.

See also

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Add an Award
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Result: the Entire Experience
Optional: Testing the Experience

Legal Notices

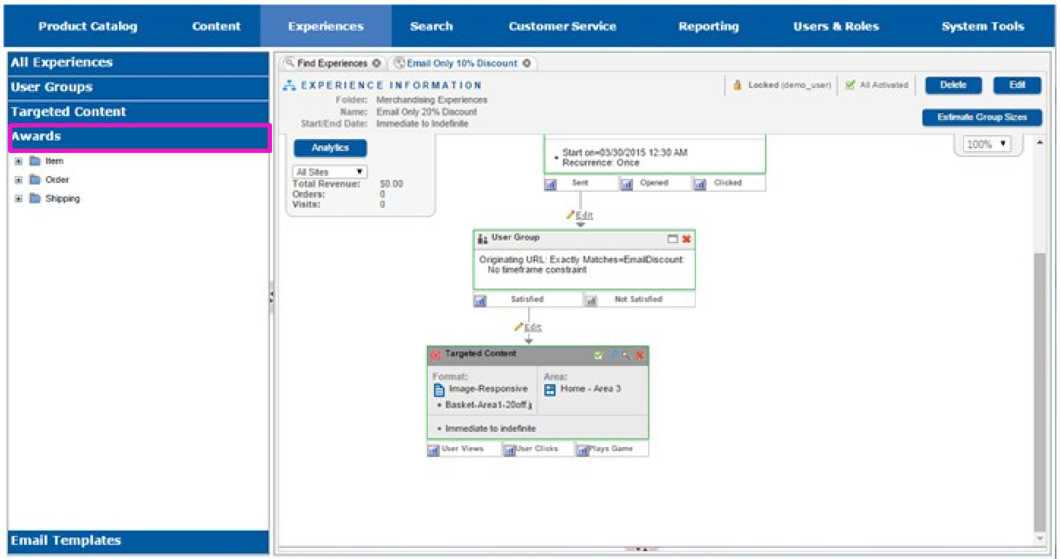
Home > Tutorials > Creating an Experience for a Promotion > Add an Award

Add an Award

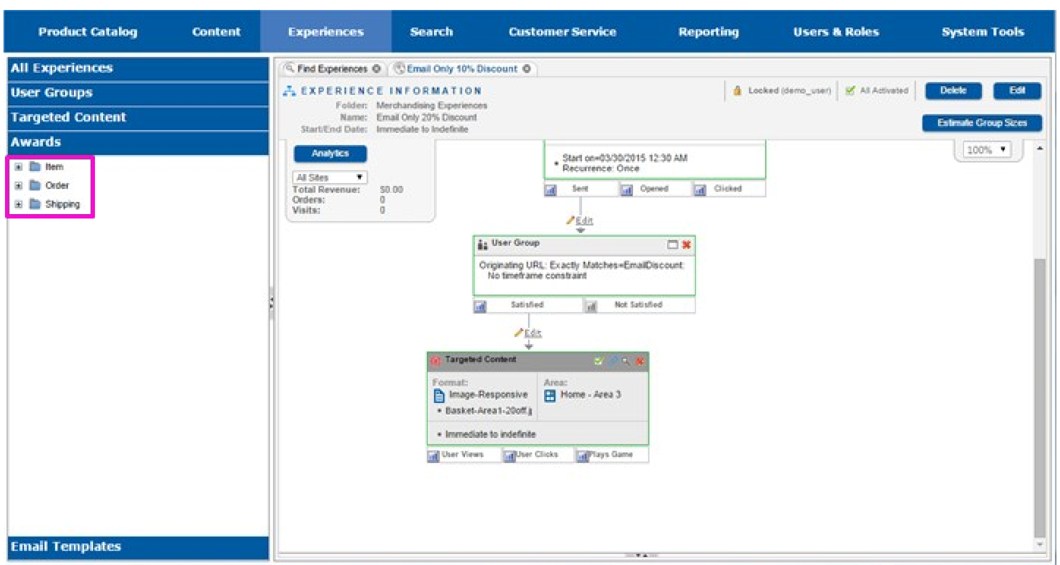
An award is a component that allows you to give a visitor a discount or other benefit.

For our example, we will be providing visitors who satisfy the user group with an automatic discount in their basket. The award will be connected to the SATISFIED connector of the user group.

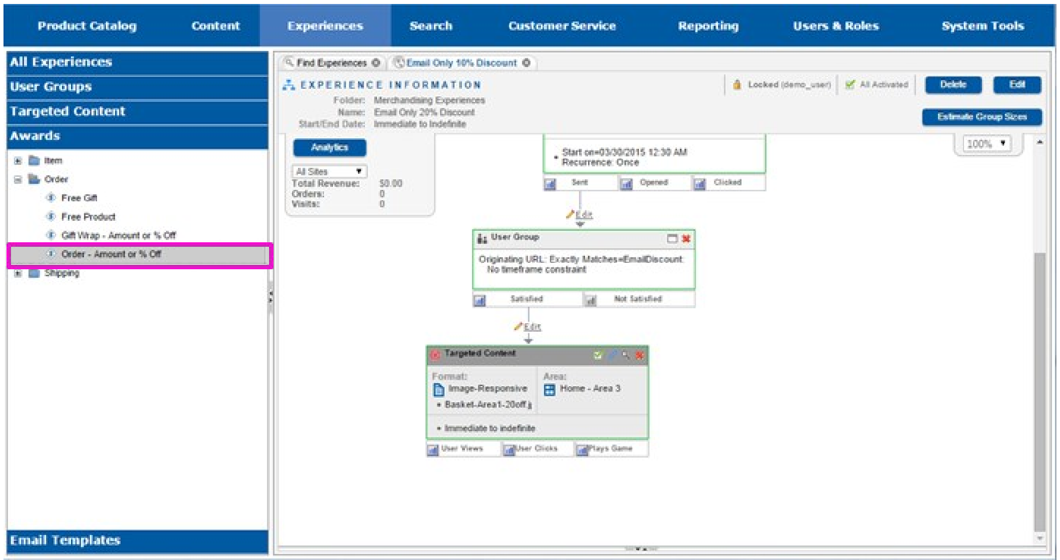
⇒ Select the AWARDS pane in the left-hand menu.



You will see that awards are grouped by the type of discount they offer.



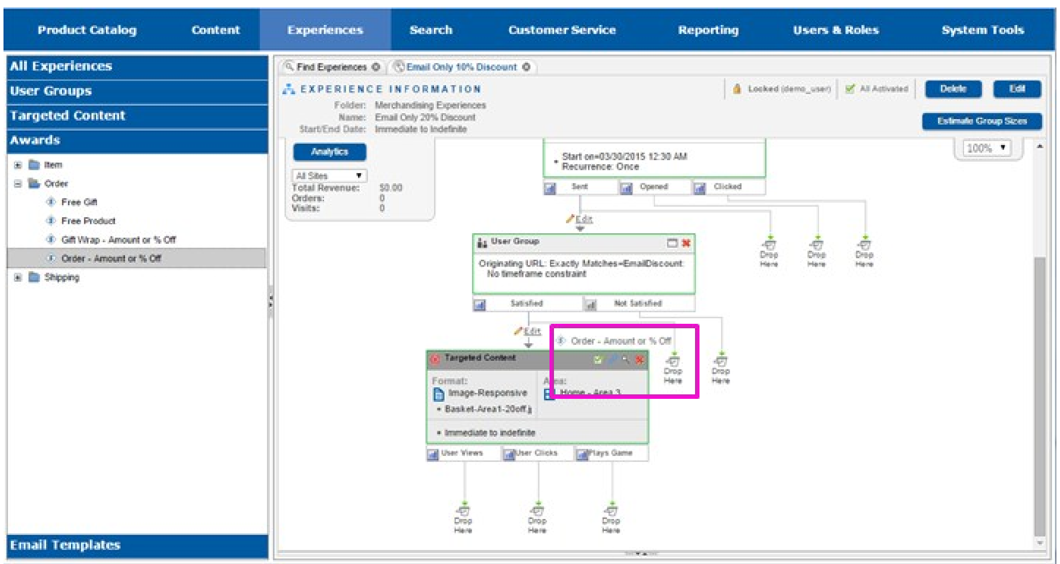
⇒ Select the plus (+) sign next to the type of discount your award will offer.



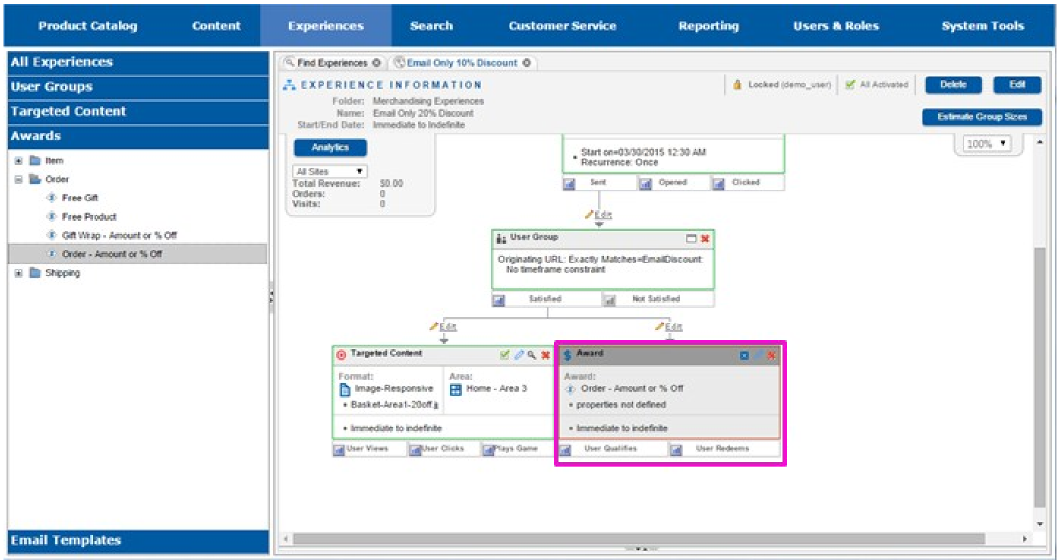
⇨ If necessary, adjust the size of the top half of the right-hand work pane so that you can see the bottom of the user group box. You will need room under it to place the award.

⇨ Select the award you are going to apply and drag it on to the right hand work pane. Do not lift up the mouse key.

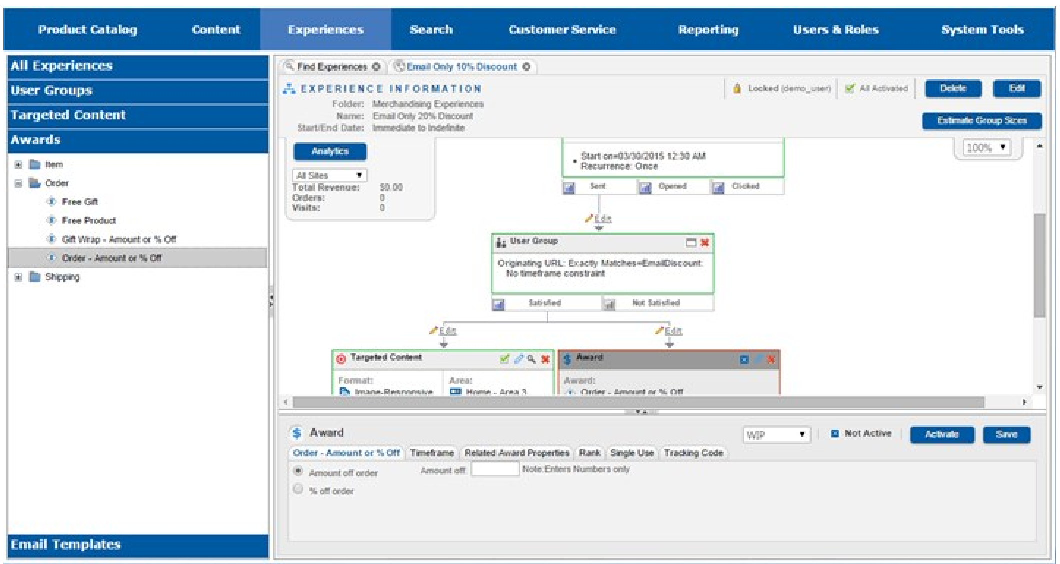
⇨ Lift up the mouse key when the award is on the DROP HERE box under the SATISFIED connection point of the user group.



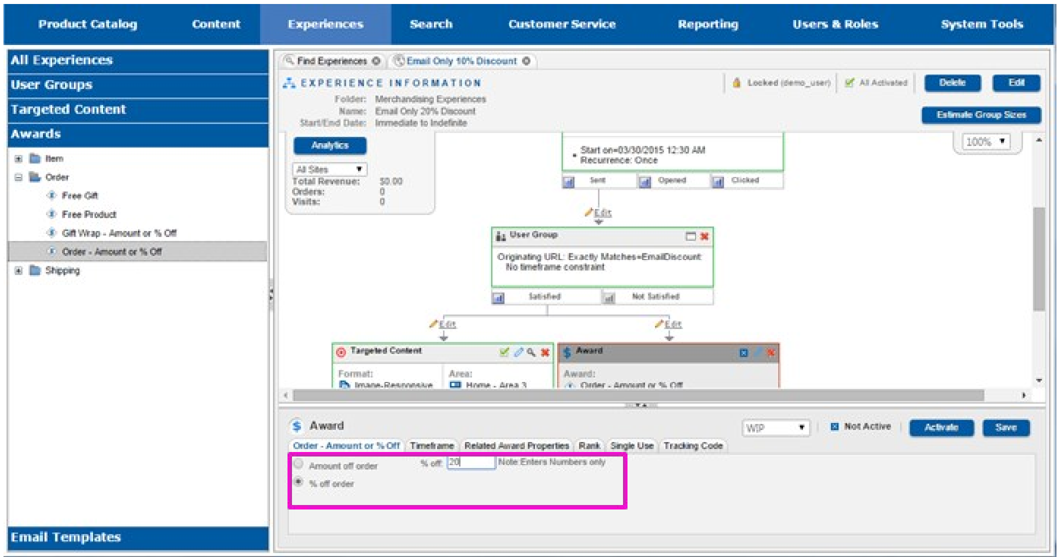
You will see a box that represents the award appear underneath the user group box and next to the targeted content box. You will also see the bottom of the right-hand pane fill in with information specific to the award you selected.



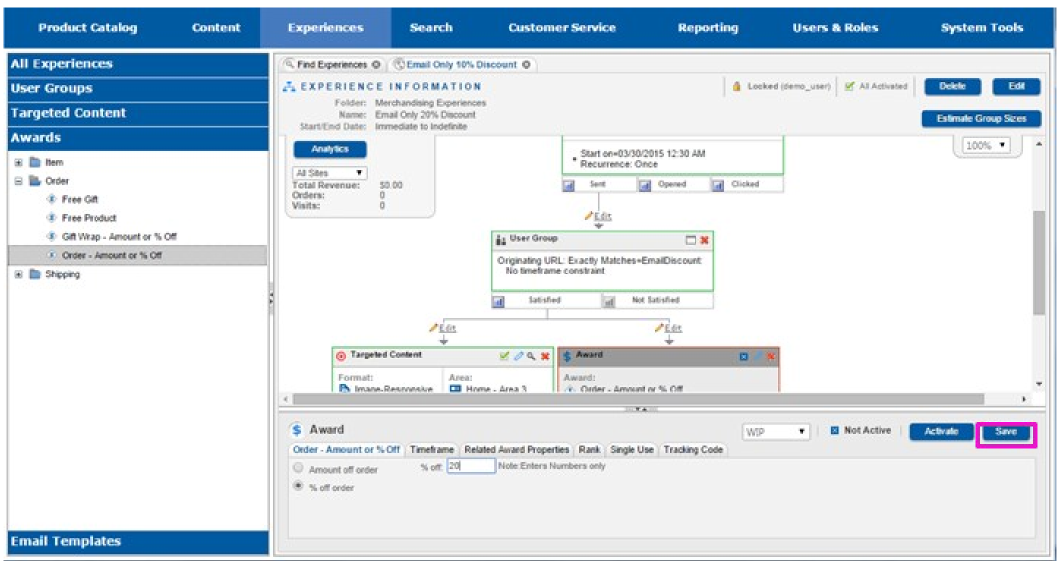
⇒ Slide the divider pane up so you can see all of the information in the bottom pane.



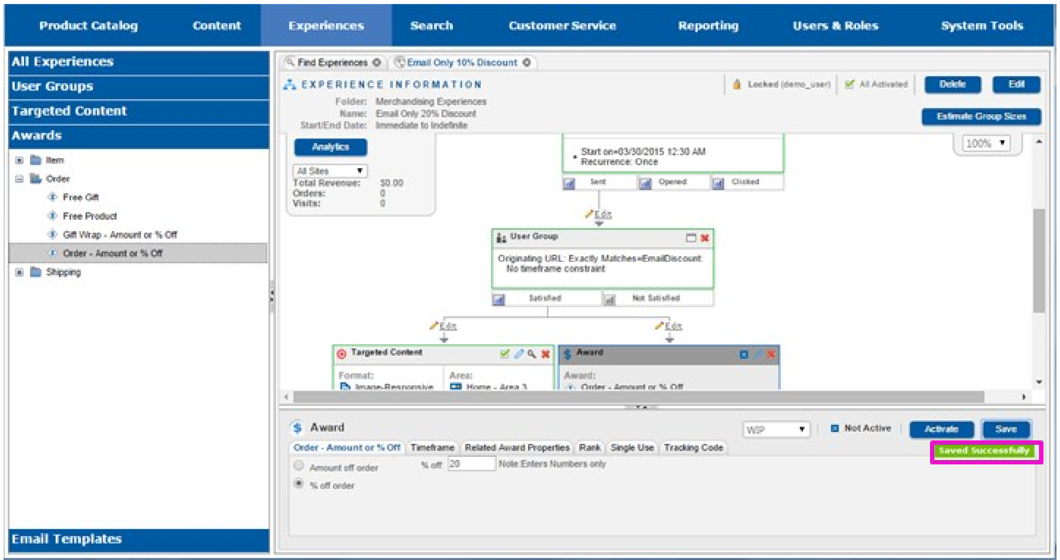
⇒ Fill in the information according to the requirements for your award.



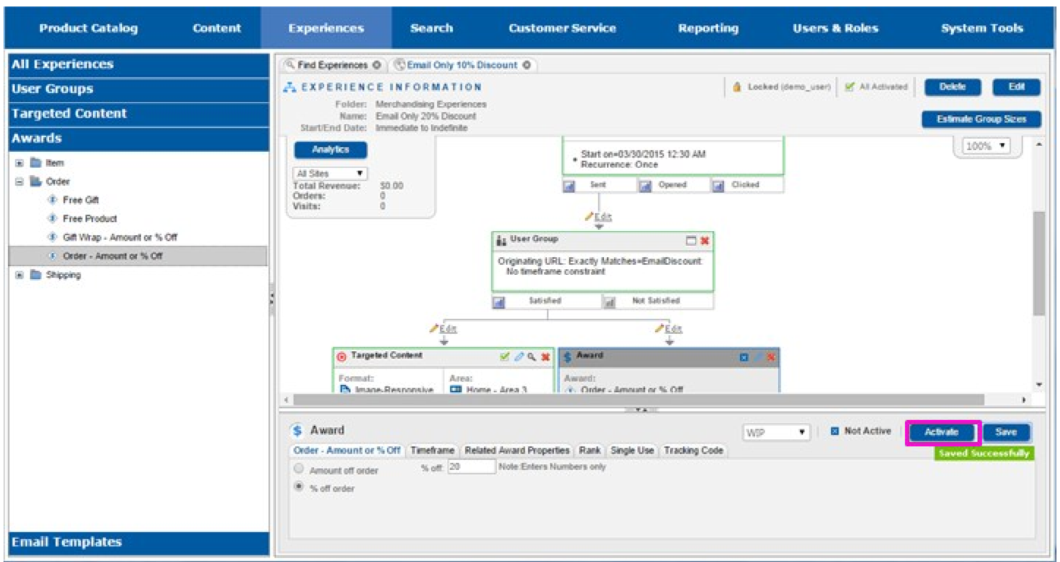
⇨ Select SAVE.



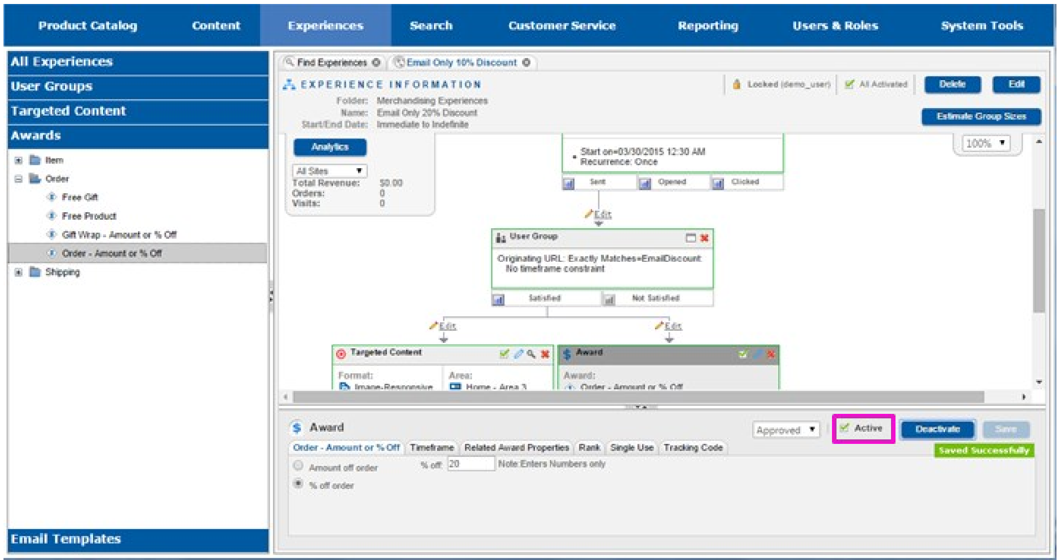
You will see a message indicating the award was successfully saved.



⇨ Select ACTIVATE.

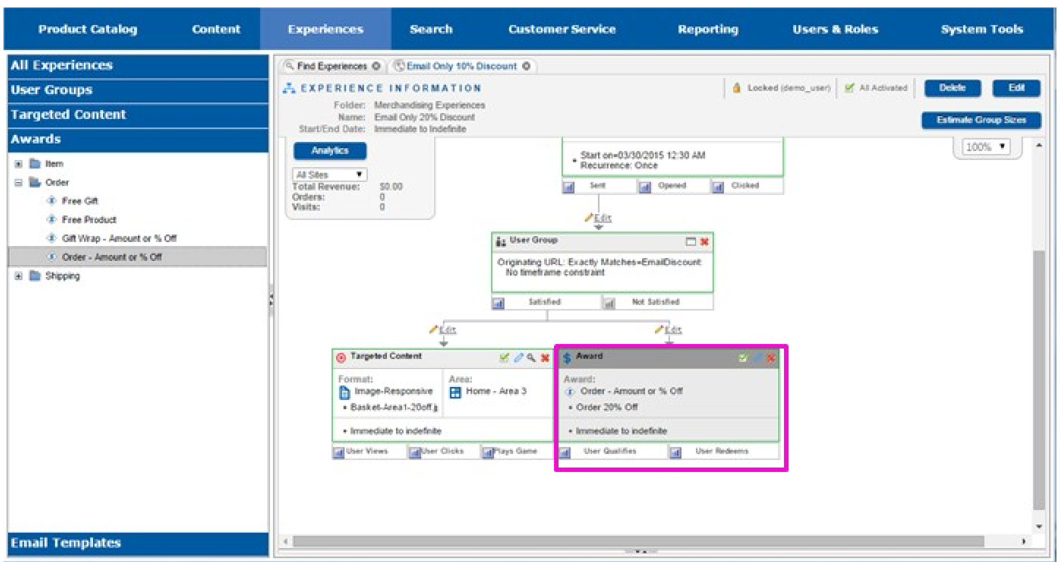


You will see that the active status of the award has gone from NOT ACTIVE to ACTIVE.



⇒ Move the divider so that you can see more of the top half of the pane.

You will see that the outline of the box for the award has turned green. This means the award has been saved, activated, and is ready for use.



At the bottom of the award you will see two rectangular boxes. These boxes are connectors for additional components in the experience. If you want an action to occur because a user has qualified for the award, attach the component to the USER QUALIFIES connector. If you want an action to occur because a user has redeemed an award, attach the component to the USER REDEEMS connector.

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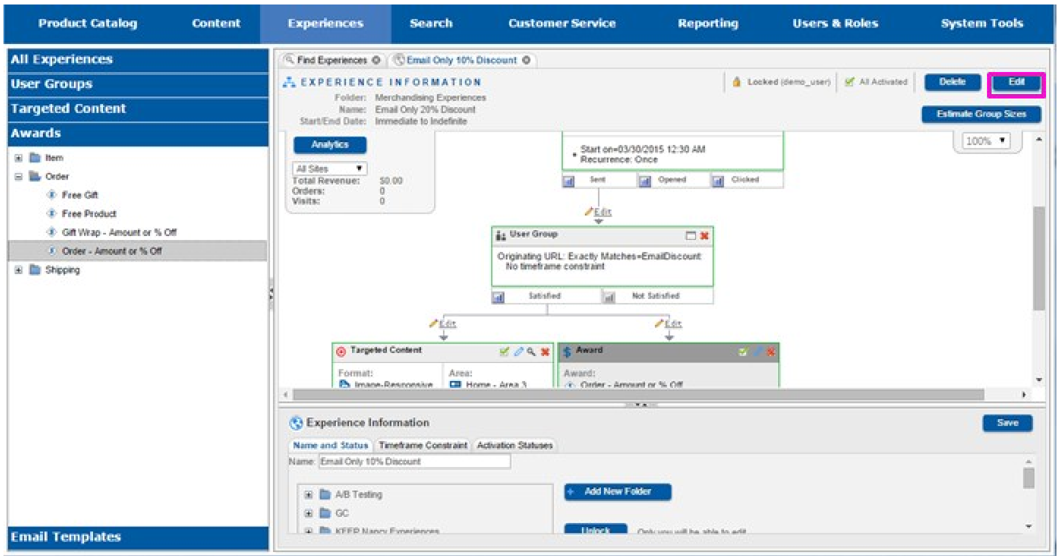
Home > Tutorials > Creating an Experience for a Promotion > Set the Time Frame

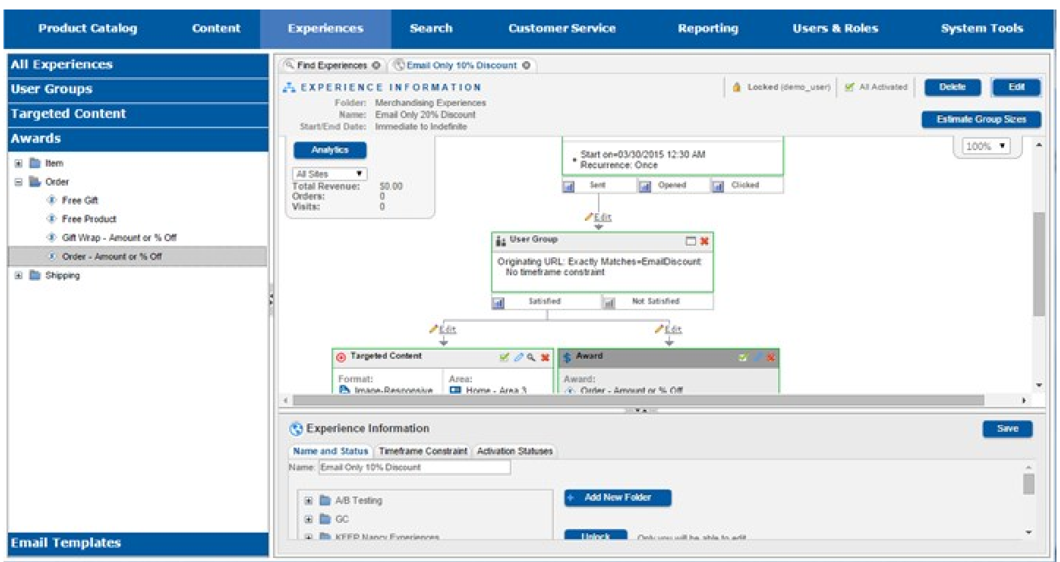
Set the Time Frame

Experiences can have time frames associated with them that specify the date they can start and/or must end. If a start date is not given, then an experience starts immediately. If an end date is not given, then the experience runs indefinitely and must be canceled by hand if it is to end. Time frames are defined for the entire experience, so you edit the experience information.

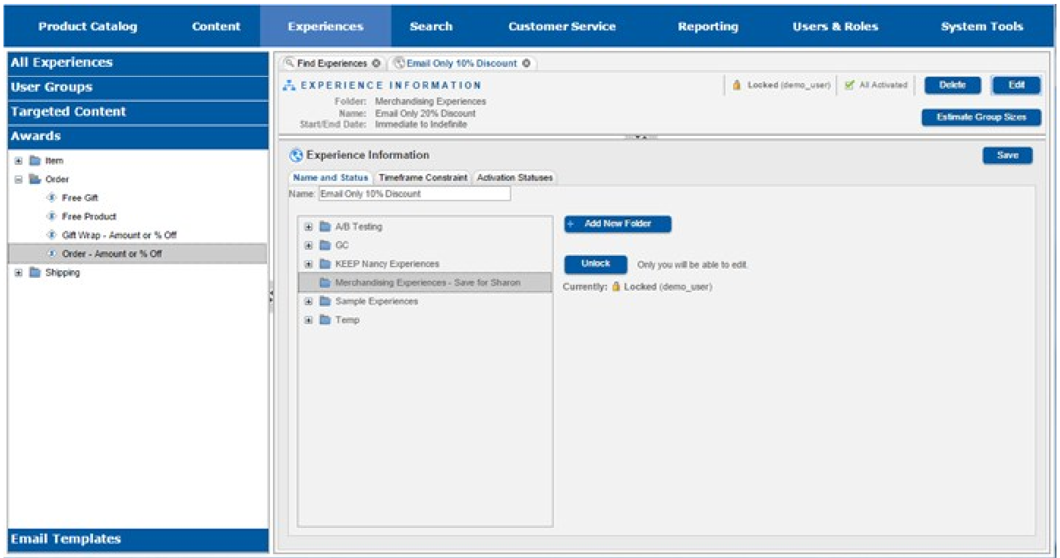
⇒ Select EDIT.



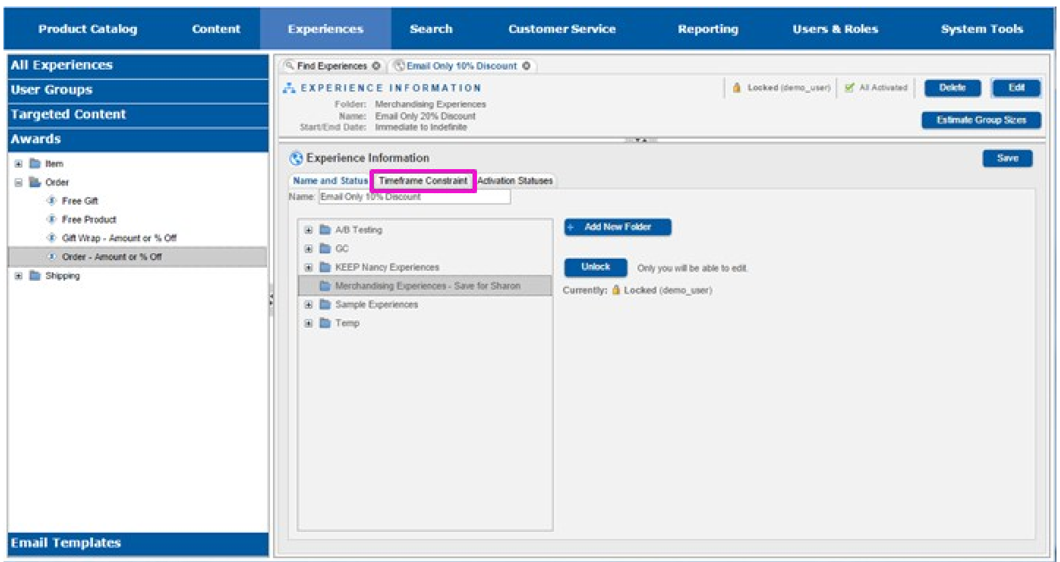
You will see the bottom of the right-hand working pane fill in with information for the entire experience.



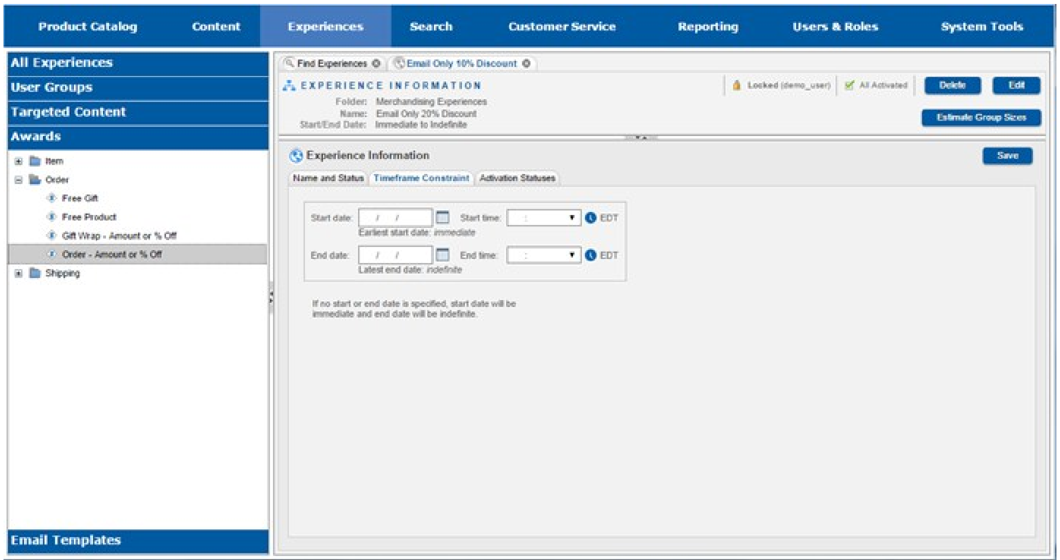
⇒ Slide the divider up so that you can see the entire bottom pane.



⇨ Select the TIMEFRAME CONSTRAINT tab.



You will see the fields for entering a start and/or stop date for the experience.

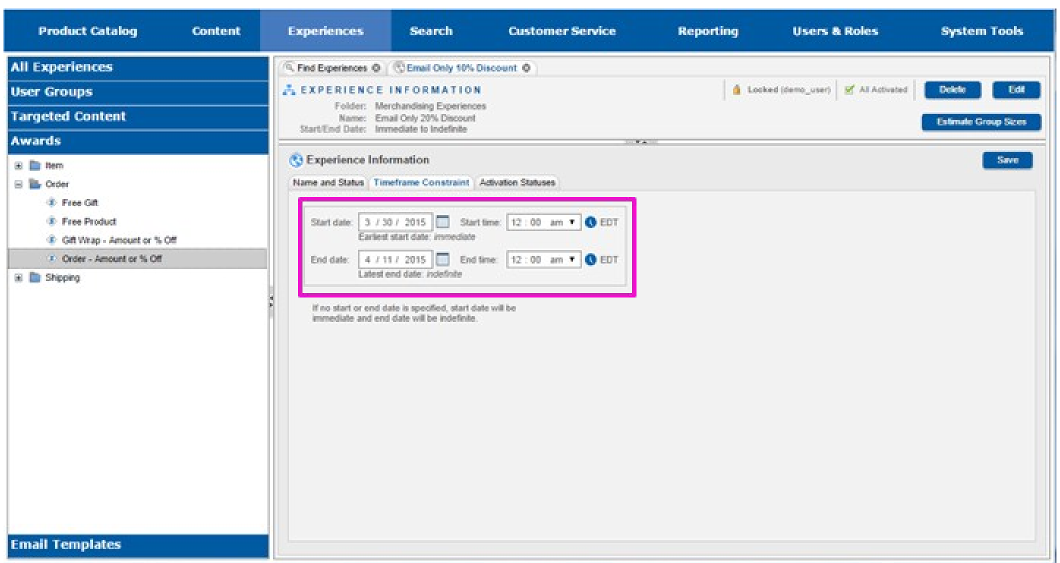


⇒ Enter a start date for the experience or use the calendar control to select one.

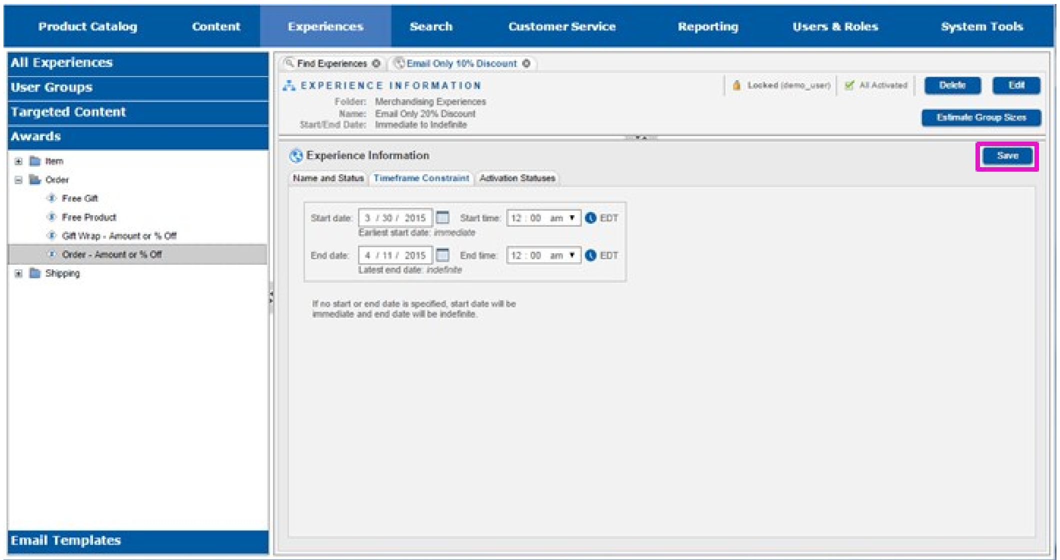
⇒ Enter a start time for the experience.

⇒ Enter an end date for the experience or use the calendar control to select one.

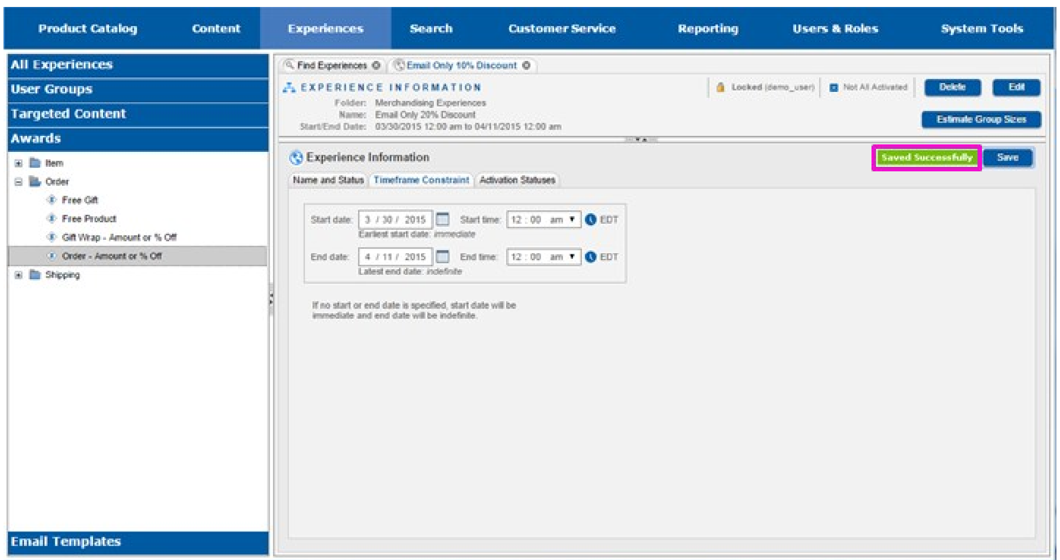
⇒ Enter an end time for the experience.



⇒ Select SAVE.

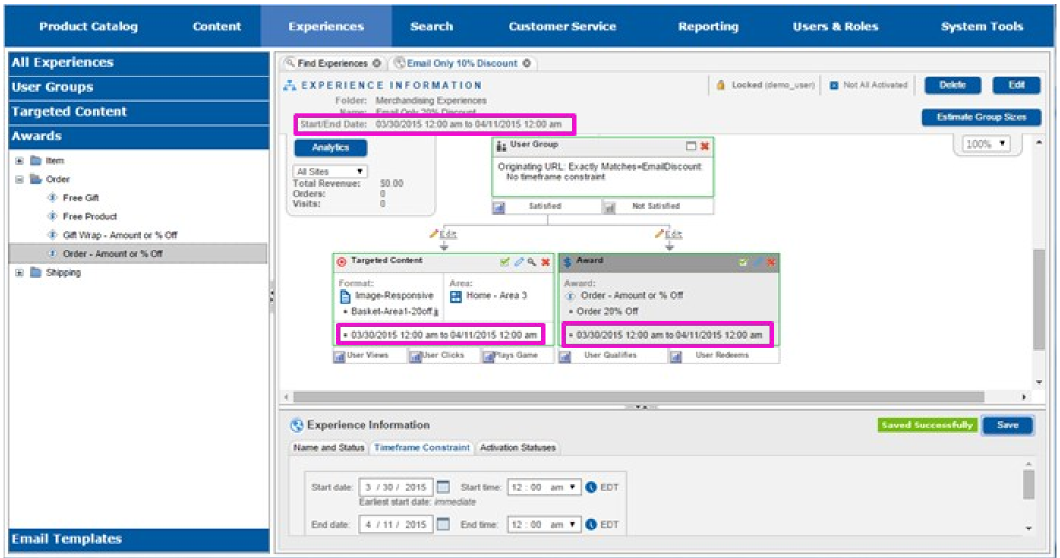


You will see a message indicating the save was successful.



⇒ Slide the divider pane down so that you can see the components in the experience.

You will see that the timeframes for them have been set to match the timeframes for the experience. No component can run for a period that is greater than the experience's.



See also

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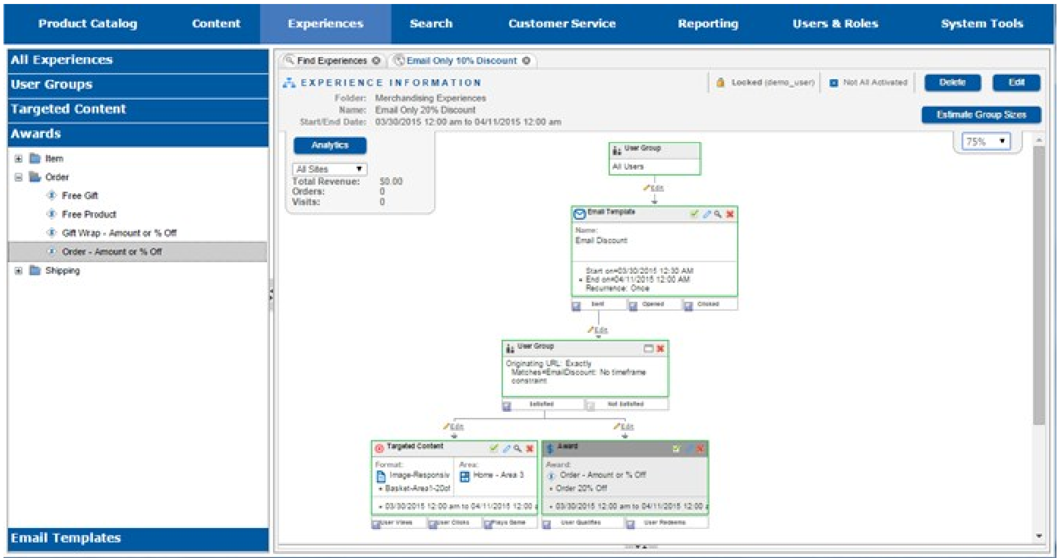
Result: the Entire Experience

The screenshot below shows the entire experience that was built.



See also

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[The Example Used](#)
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[Add Targeted Content](#)
[Add an Award](#)
[Set the Time Frame](#)
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Optional: Testing the Experience

To test an experience, you need to first ensure that you are within the time frame that the experience will be active in. If necessary, you can temporarily reset the experience's time frame to an earlier date.

You then need to follow the components in the experience and exercise each portion of it. As you meet the requirements of each component, you should be able to progress to the next component.

If you set the time frame to any earlier start date, remember to reset the start date when you are done testing.

See also

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Home > Tutorials > Creating an Experience for an A/B Test

Creating an Experience for an A/B Test

This tutorial describes how to create an experience that can be used for A/B testing on a site. The experience created segments visitors to the site into two groups, one of which sees targeted content and are offered free shipping, and the other that sees nothing other than the regular site. This tutorial divides the site's visitors into equal 50% groups, but segments can be created with different percentages if desired.

Follow the steps in this tutorial in the order they are presented.

Conventions Used in this Tutorial

SMALL CAPS: Items that appear in small caps refer to text items on the application. If you are viewing the application, you should see a label, menu, or button with the same text on it.

⇨: Arrows appear at the beginning of areas that contain a task you should perform. When you see the arrow, you should perform the described task.

: Pink outline boxes are used to highlight areas of screenshots that are being referred to in the text. These are used to call attention to a particular area of the screen, but you will not see those boxes on your screen when you are using the application.

Articles in this section

See also

Adding Products To Categories
Adding Synonyms to the Thesaurus
Creating an Experience for a Promotion
Creating Dynamic Attributes
Creating New Products
Modifying Content
Working With Stores

Before You Begin

Experiences are created in the Site Manager. Before you begin creating an experience, you should:

- Have a valid Site Manager log in and know how to access the Site Manager;
- Know how to navigate the Site Manager and find various sections in it;
- Be logged in to the Site Manager;
- Know the details of the A/B test you will be creating.

See also

The Example Used
Create the Experience
Add a Targeted Content Node
Segment the Users
Complete the Targeted Content Node
Add an Award Node
Result: The Entire Experience

The Example Used

This tutorial describes the creation of an experience that segments the visitors to the site so that the site can test the effectiveness of offering free shipping. Half of the visitors will see targeted content that describes the free shipping offer, and will receive free shipping when they check out. The other half of the visitors will receive nothing other than what they would normally see on the site.

See also

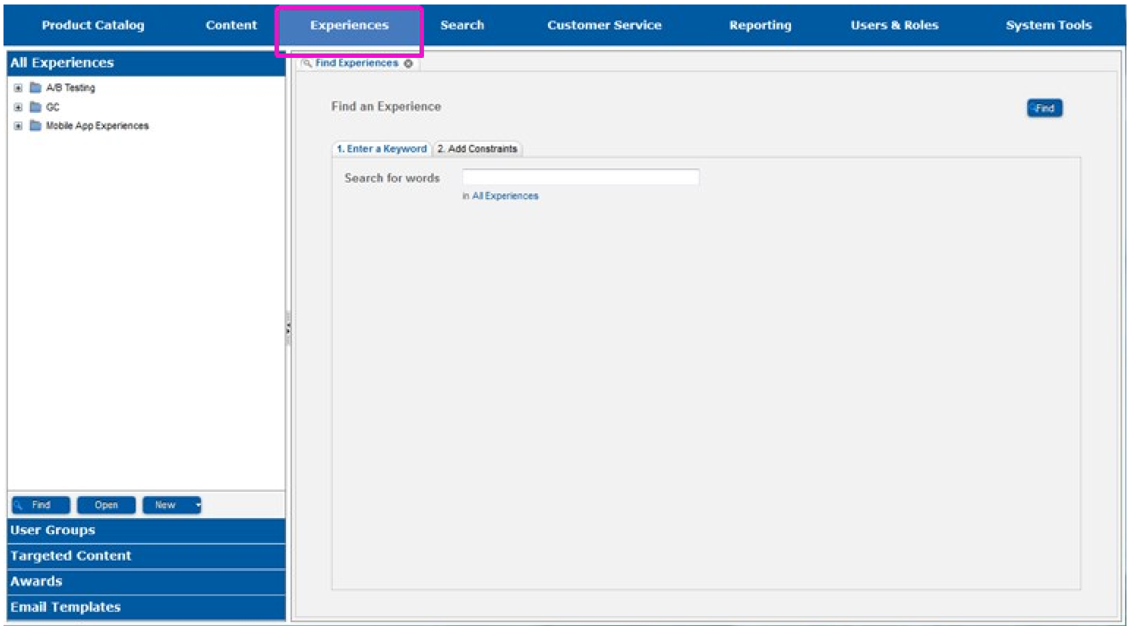
Before You Begin
Create the Experience
Add a Targeted Content Node
Segment the Users
Complete the Targeted Content Node
Add an Award Node
Result: The Entire Experience

Home > Tutorials > Creating an Experience for an A/B Test > Create the Experience

Create the Experience

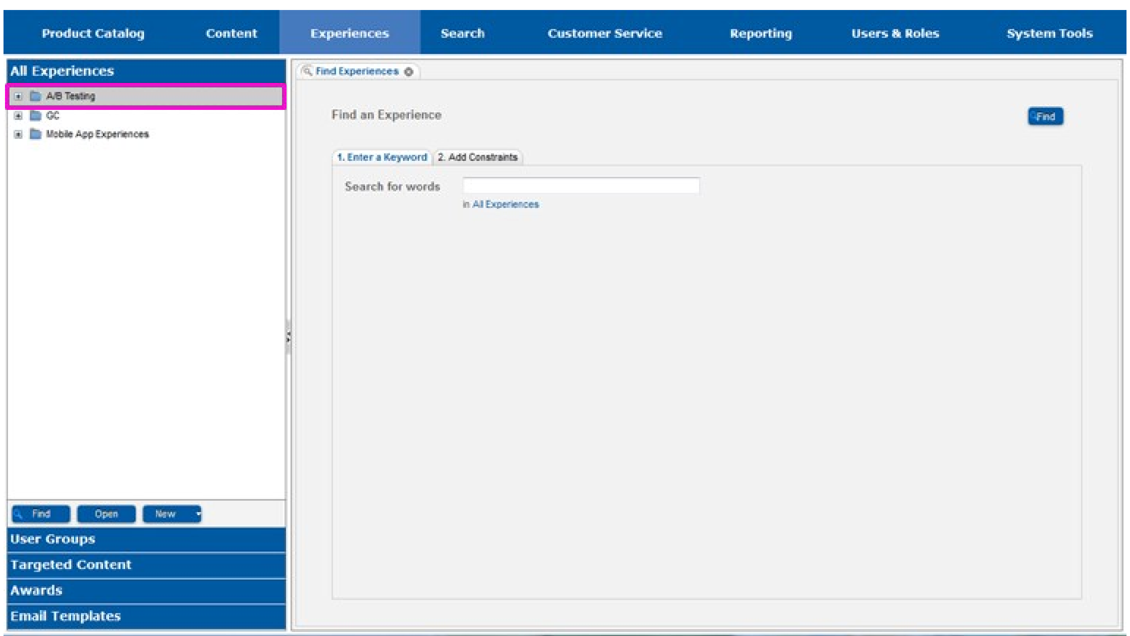
Experiences are added in the EXPERIENCES section of the Site Manager.

⇒ Select EXPERIENCES.

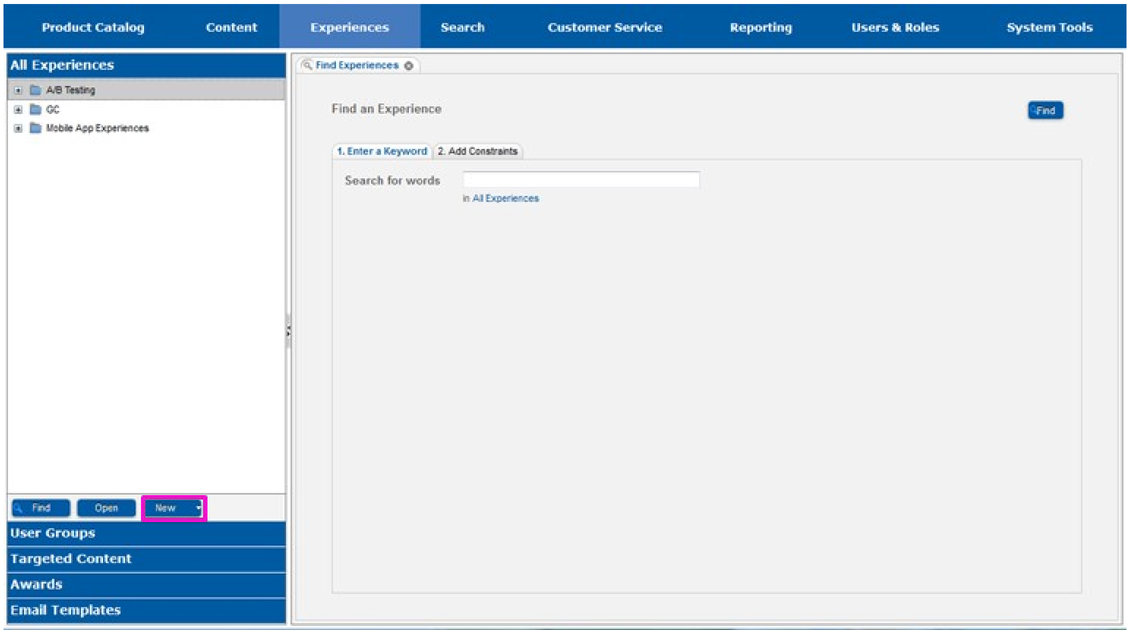


On the left hand side of the screen you will a navigation tree for all of the existing experiences. You will create your new experience within that navigation tree.

⇒ Select the folder you wish to add your new experience to.

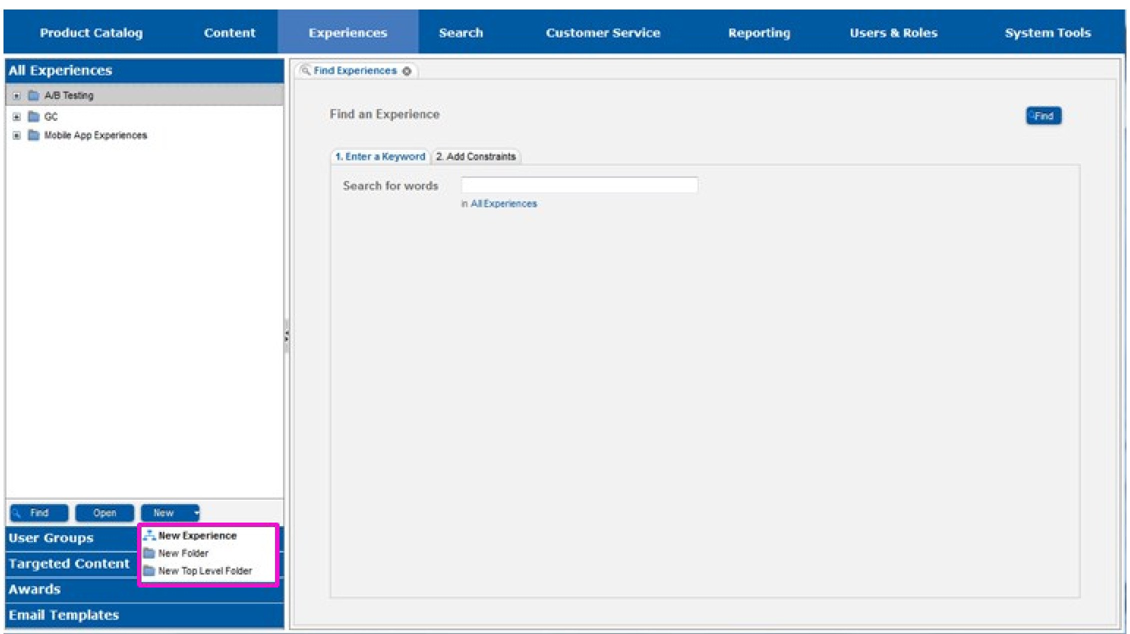


⇒ Select the down arrow to the right of the NEW button.

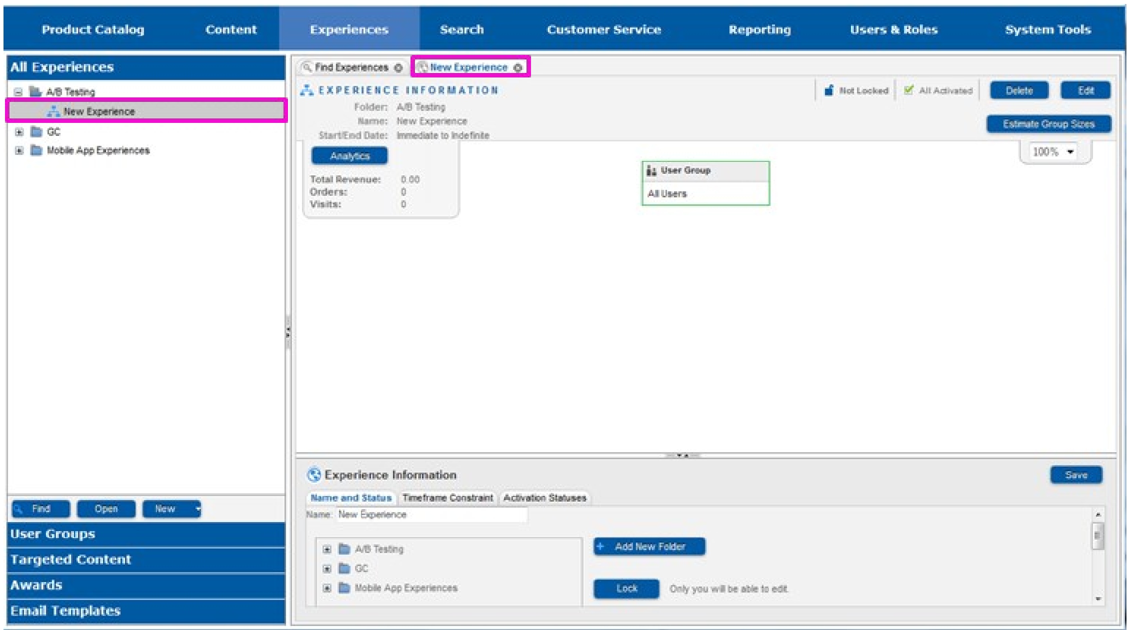


A drop-down menu will appear.

⇨ Select NEW EXPERIENCE.

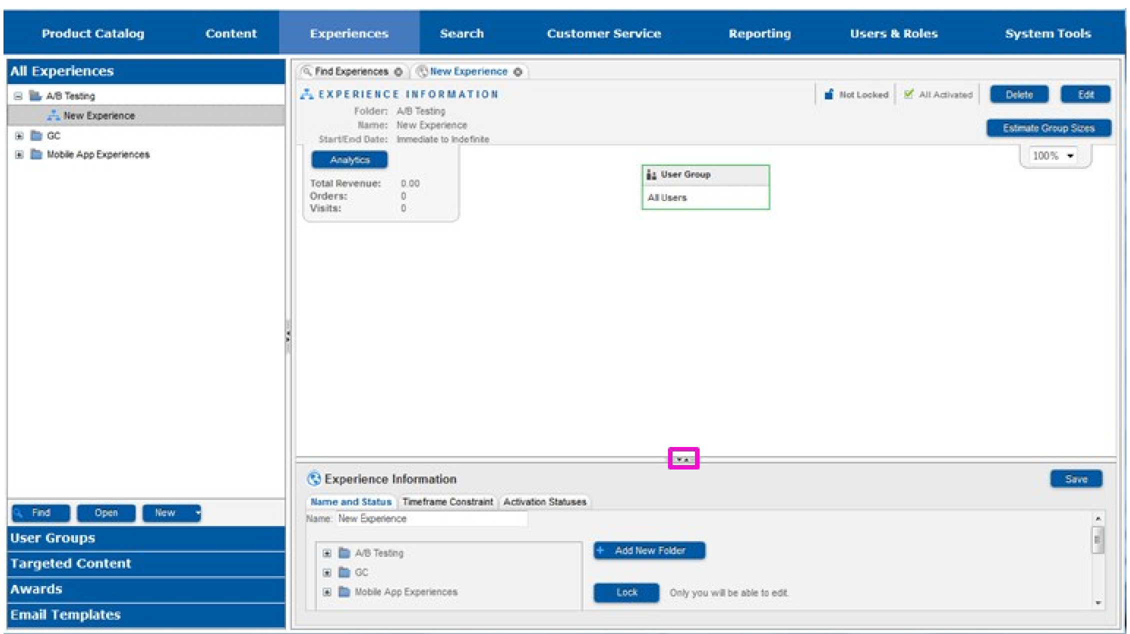


A new experience will appear in the folder you selected. A new tab will also open in the right hand working area. This new tab is where you will create the content of the experience.

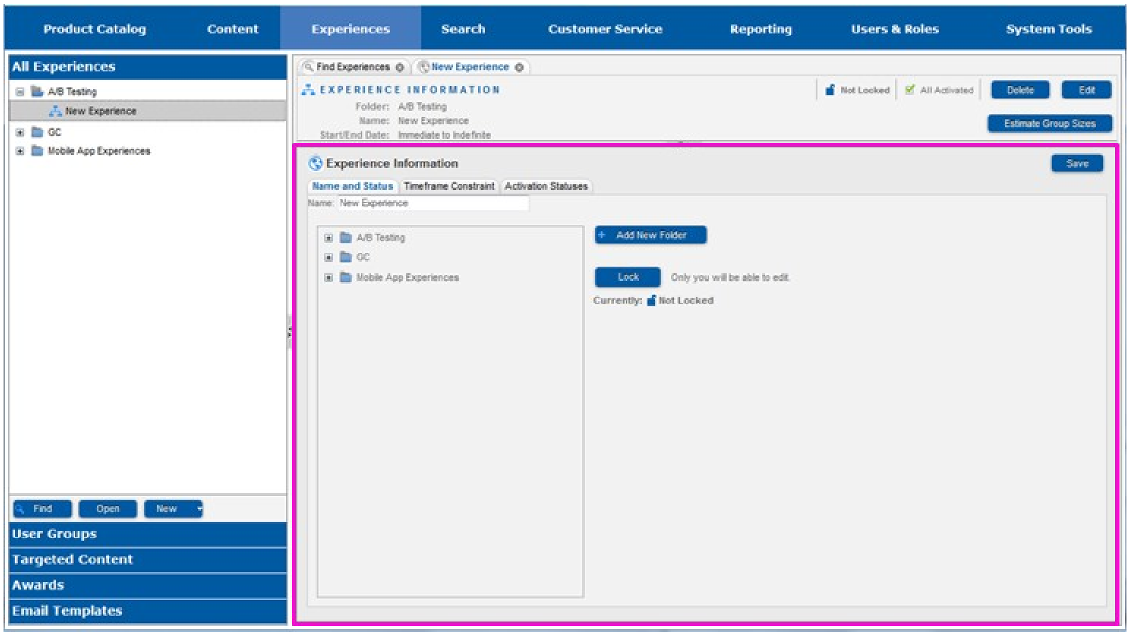


The experience needs to be named. It is easiest to work with the properties of the experience if the properties pane is maximized.

⇒ Select the arrow pointing up on the divider between the top working pane and the bottom properties pane.

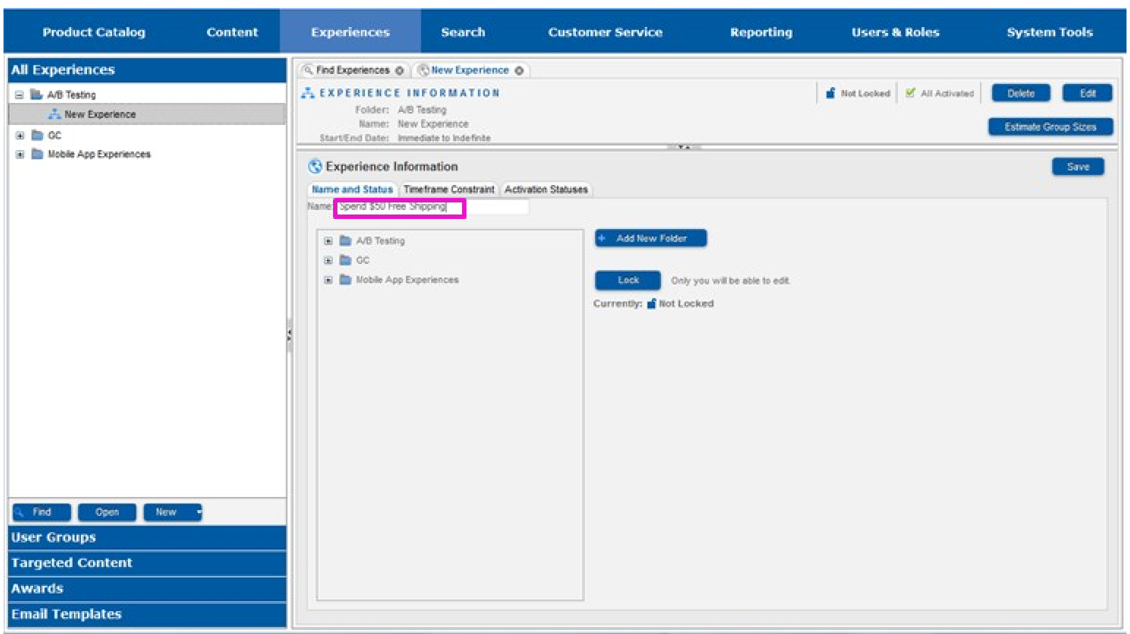


The properties pane will expand and fill the right hand portion of the screen.

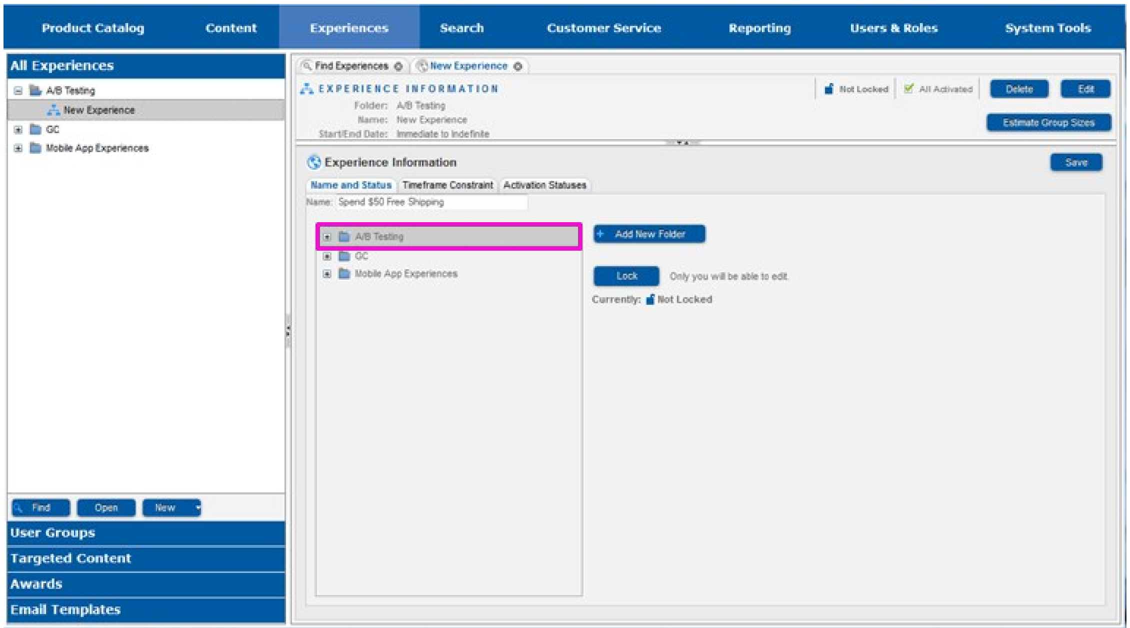


The experience should be renamed to a meaningful name, and then locked so that other users cannot make edits to it while you are.

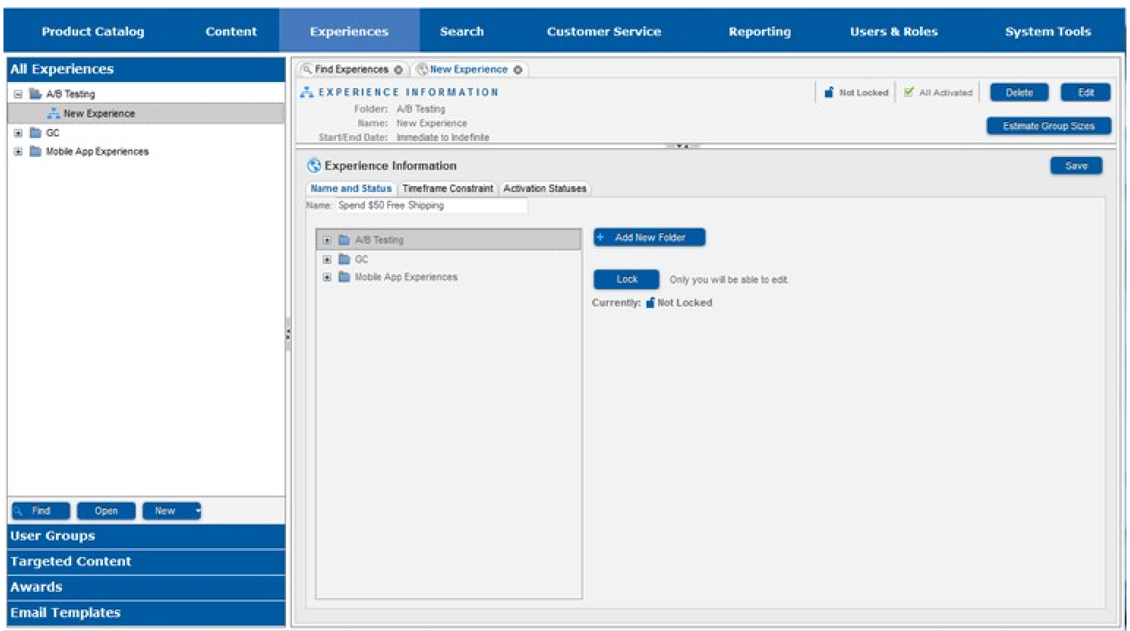
⇒ Enter a new name for the experience in the NAME text field.



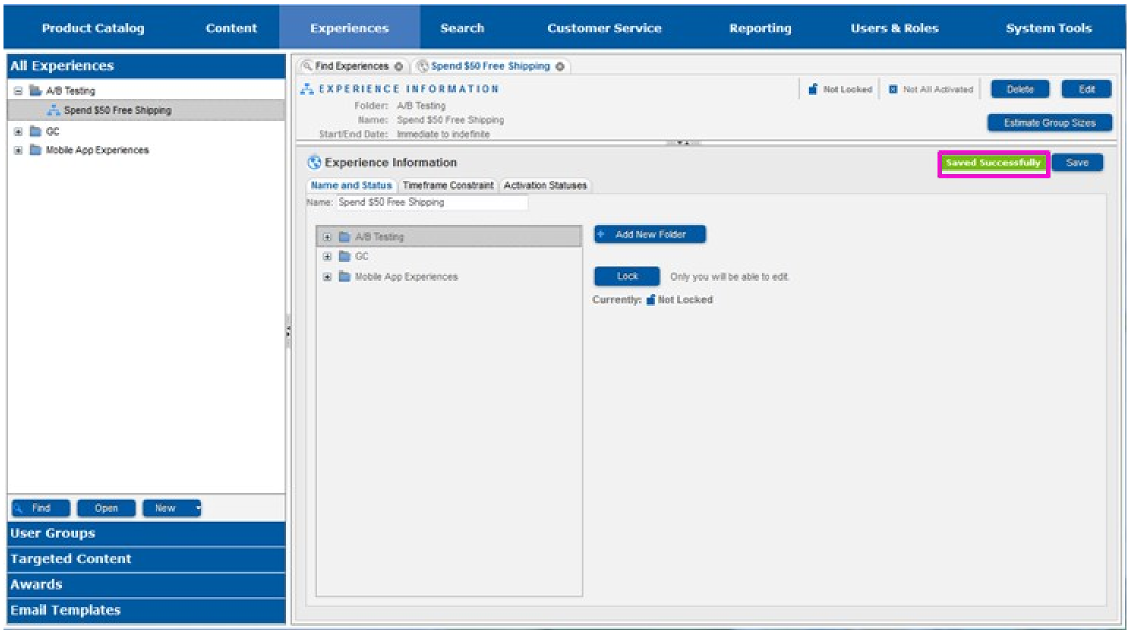
⇒ Select the folder in the folder tree that the experience is in.



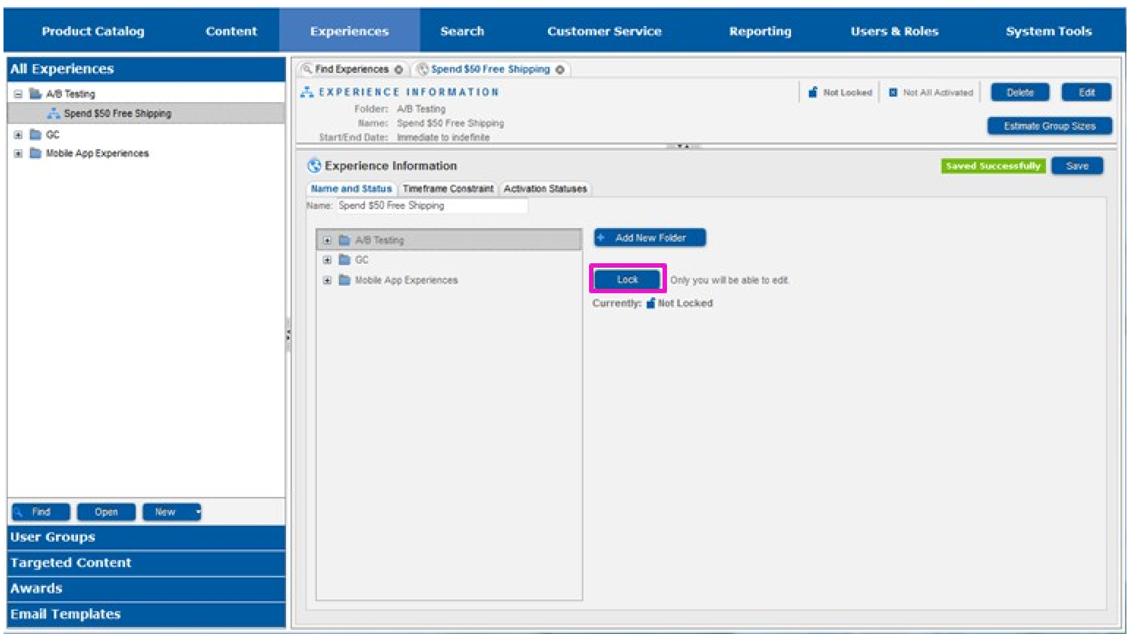
⇒ Select the SAVE button.



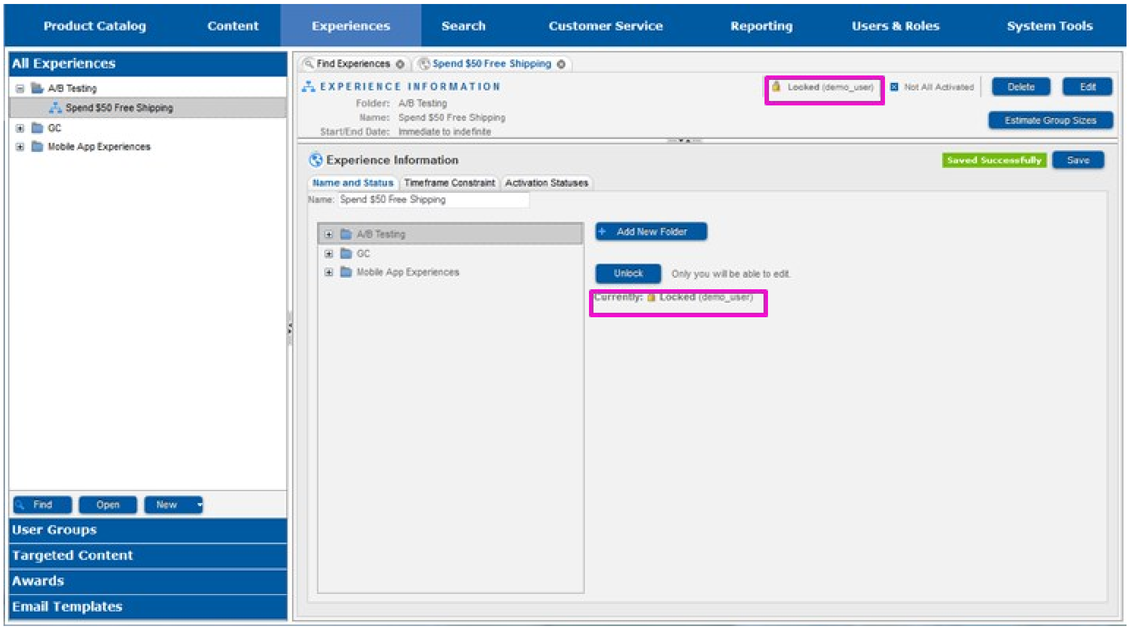
You will see a message saying the experience was saved.



⇒ Select the LOCK button.

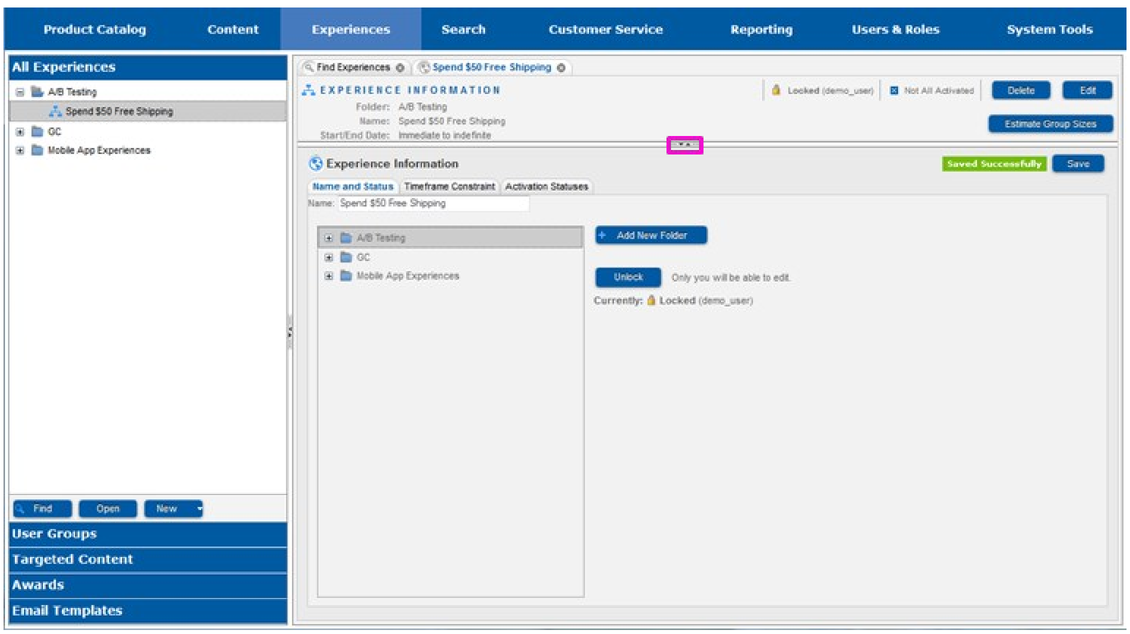


The experience will be locked. You will see that indicated at the top portion of the work pane, as well as near the lock button.

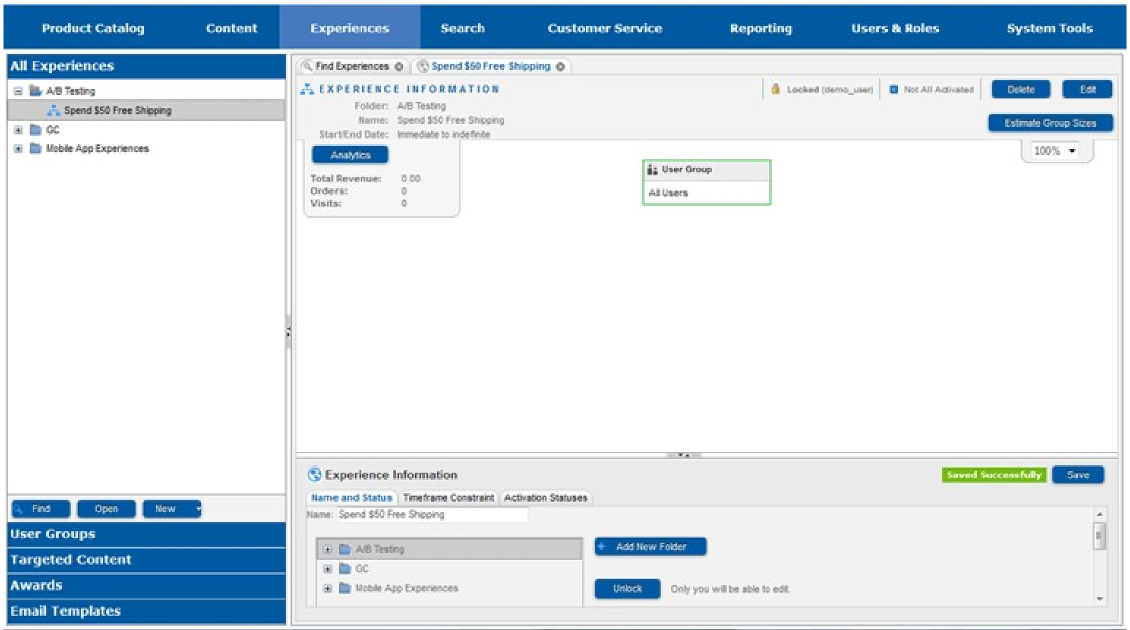


The properties pane should be returned to its default size.

⇒ Select the arrow pointing down on the divider between the top working pane and the bottom properties pane.



The properties pane will return to its default size.



See also

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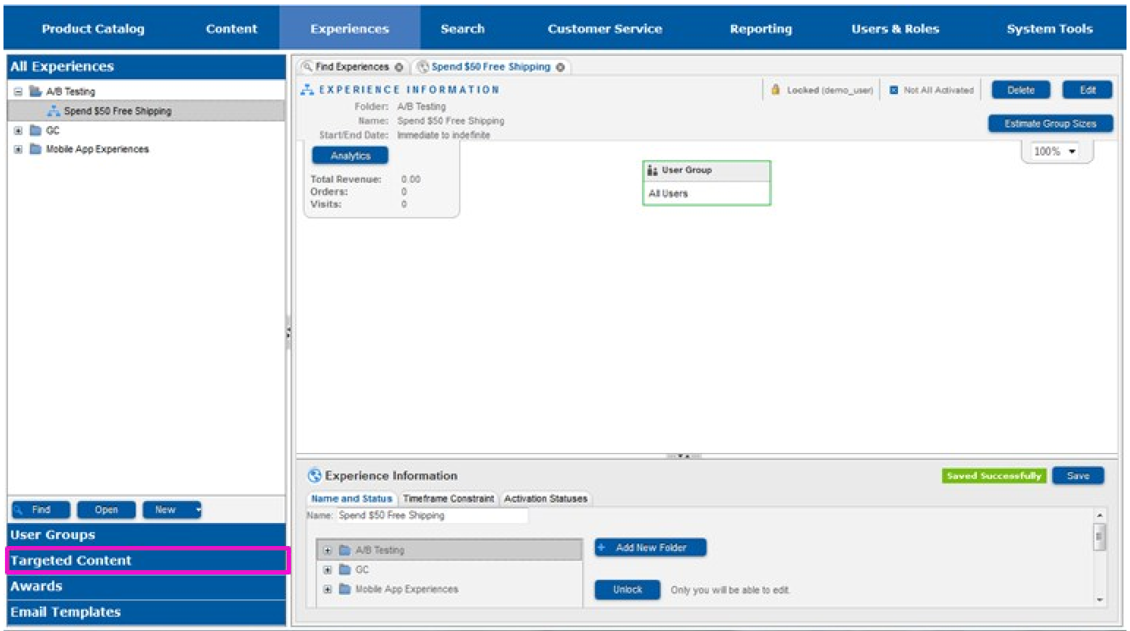
The Example Used
Add a Targeted Content Node
Segment the Users
Complete the Targeted Content Node
Add an Award Node
Result: The Entire Experience

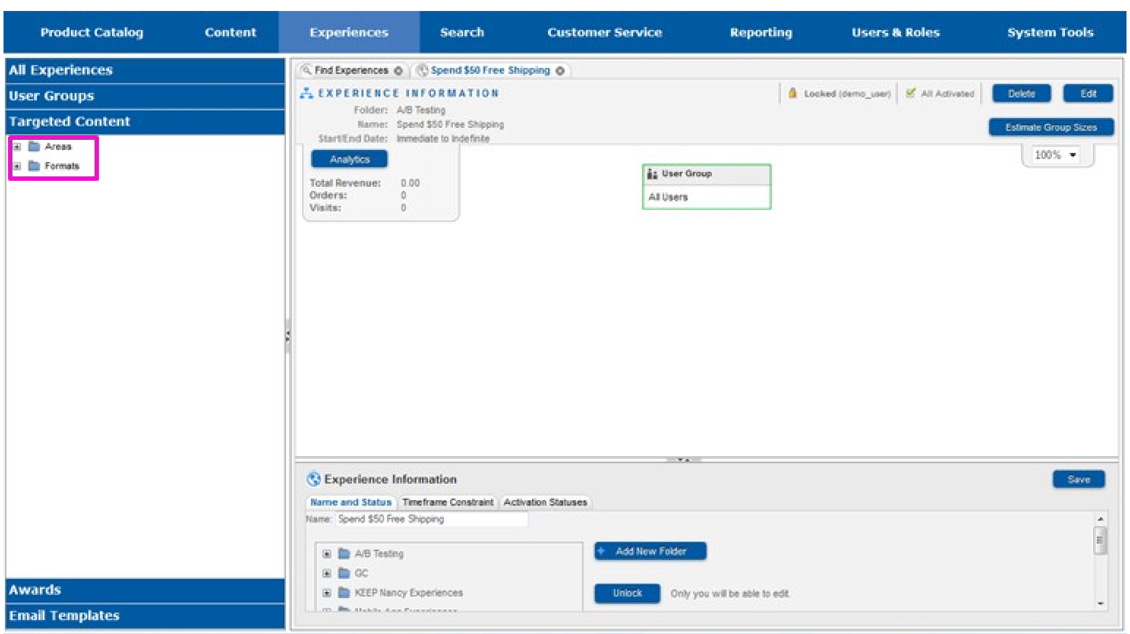
Add a Targeted Content Node

The first node that will be added to the experience is a targeted content node. The targeted content will only be seen by the group of visitors who are going to be offered free shipping. Once this node is added, we will be able to segment the experience into two halves.

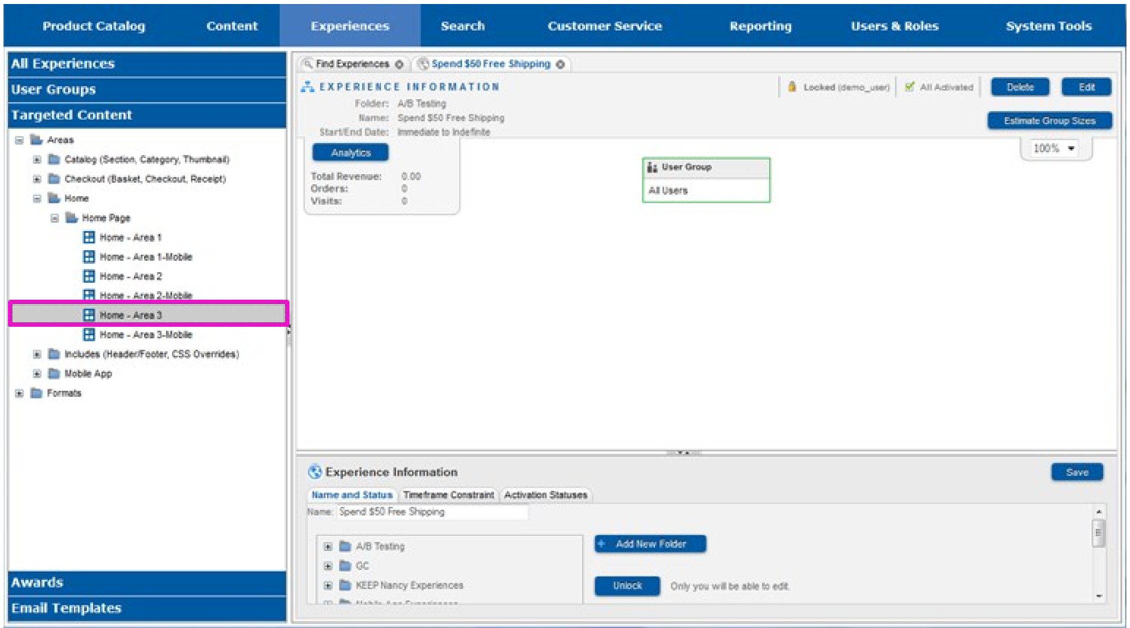
⇒ Select the TARGETED CONTENT sliding header in the left navigation pane.



The targeted content portion of the navigation pane will expand and you will see the selections available.

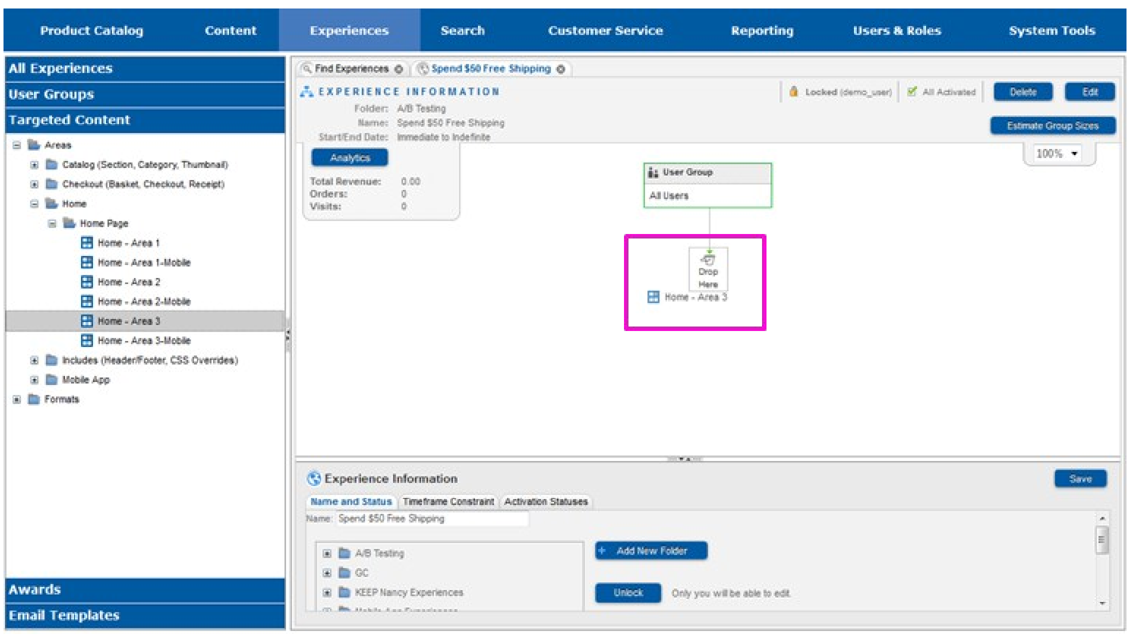


⇒ Expand the targeted content folder tree until you locate the location you want to add the targeted content to.



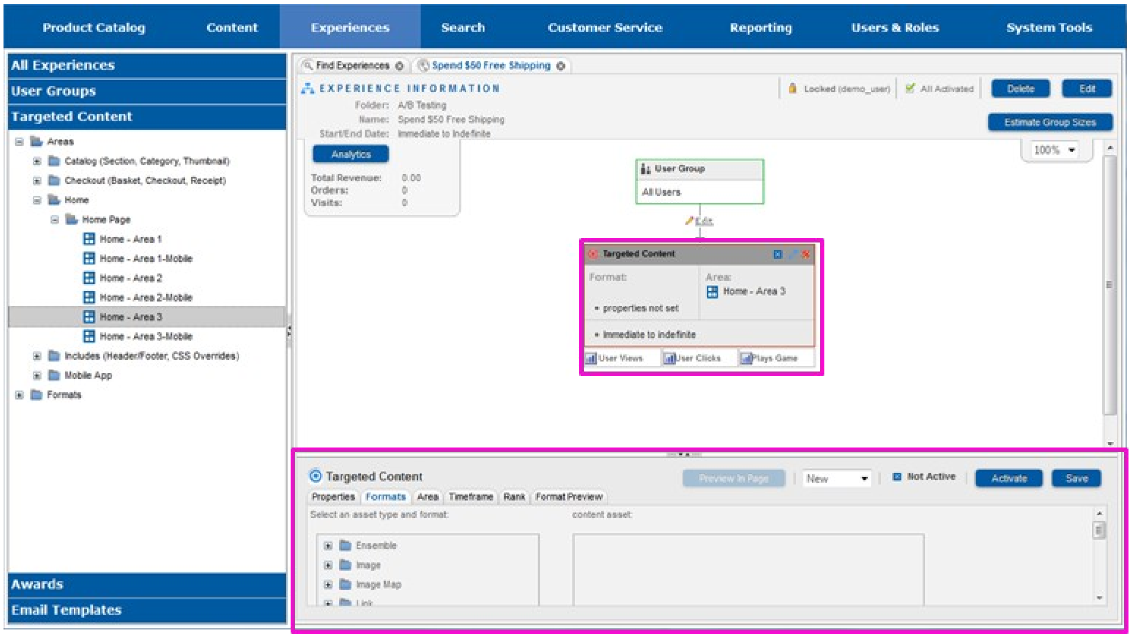
⇒ Select the area you adding the content to, then drag it into the working pane on the right.

Drop points will appear on the working pane.



⇒ Drag the area over the top of the drop point, then release the mouse button.

A new node will appear on the working pane, and the properties pane will fill in with information specific to the targeted content area.



See also

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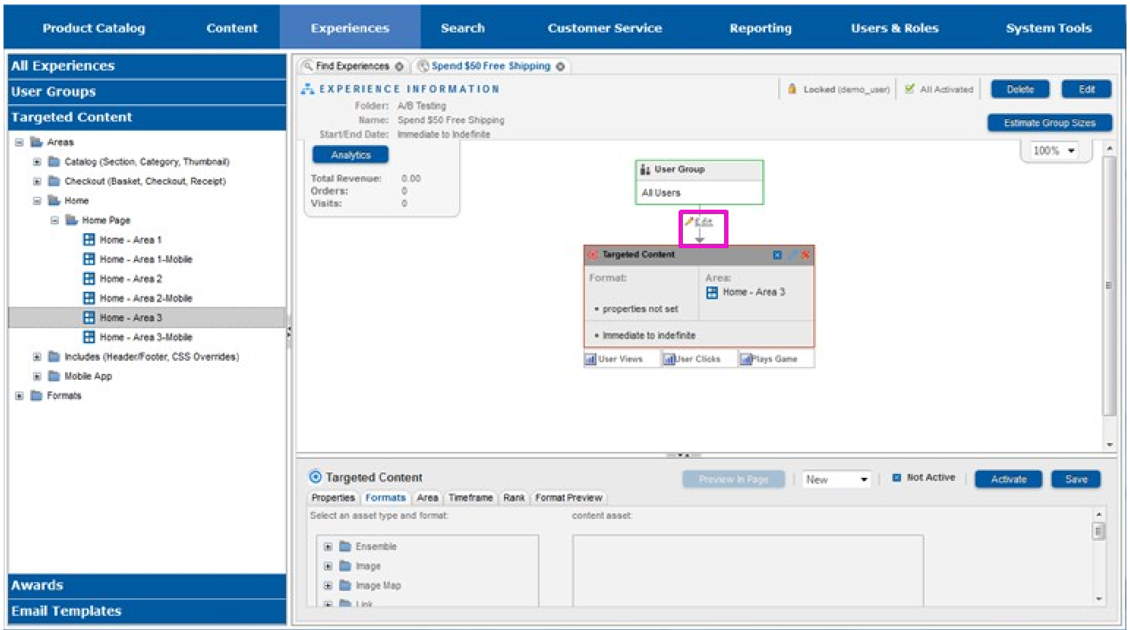
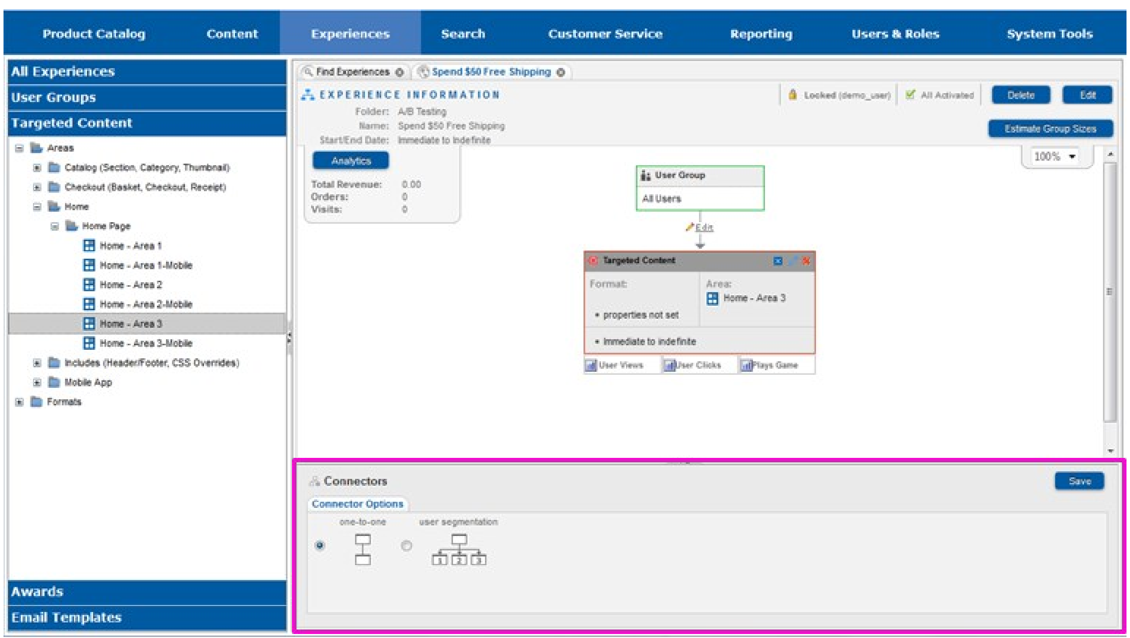
Segment the Users

Once a node has been added to the experience, the connector link to that node can be edited and divided into segments.

⇒ Select the EDIT link on the connector at the top of the targeted content node.

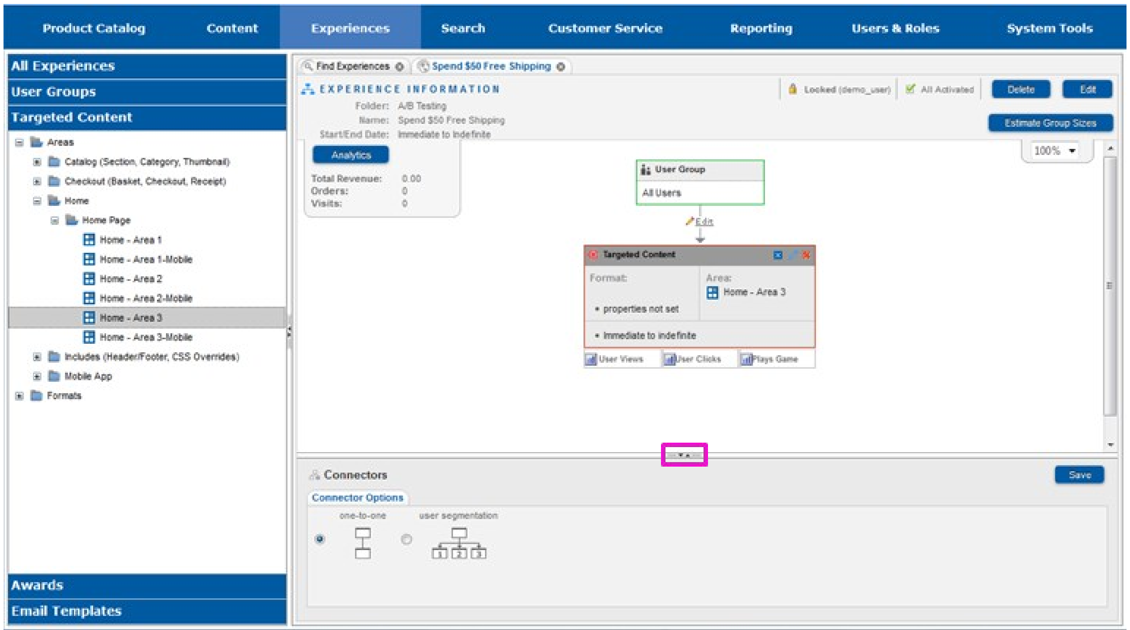


The properties pane will redraw and you will see information on the connector link.



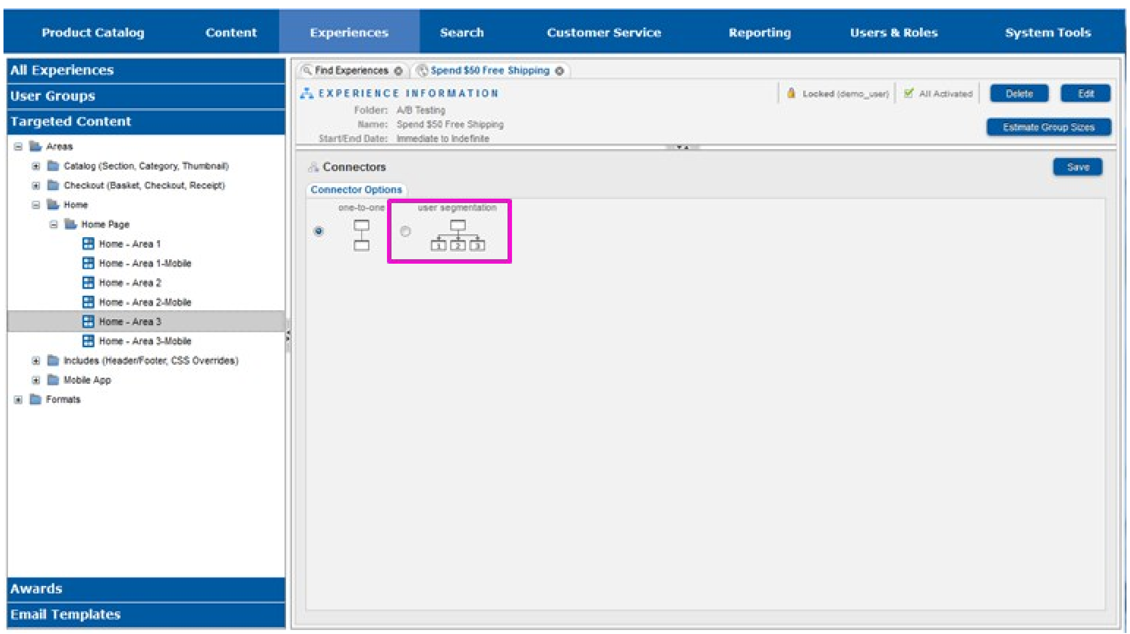
The properties pane should be maximized for easiest use.

⇒ Select the up arrow on the divider between the work pane and the properties pane.

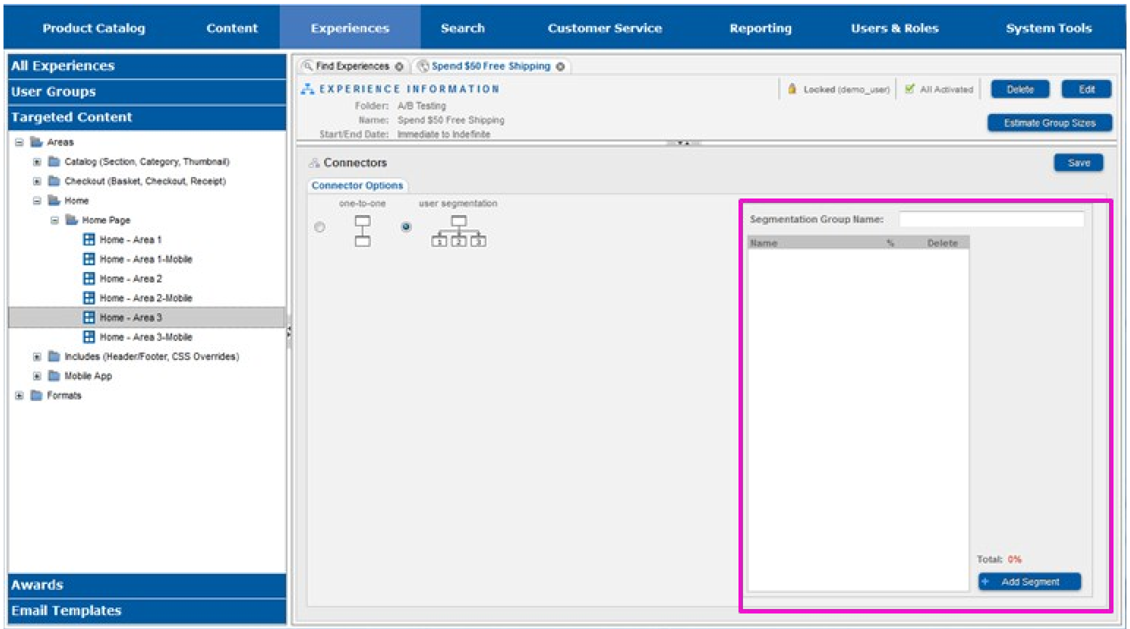


The properties pane will fill the screen and you will see the entire information in it.

⇒ Select USER SEGMENTATION.

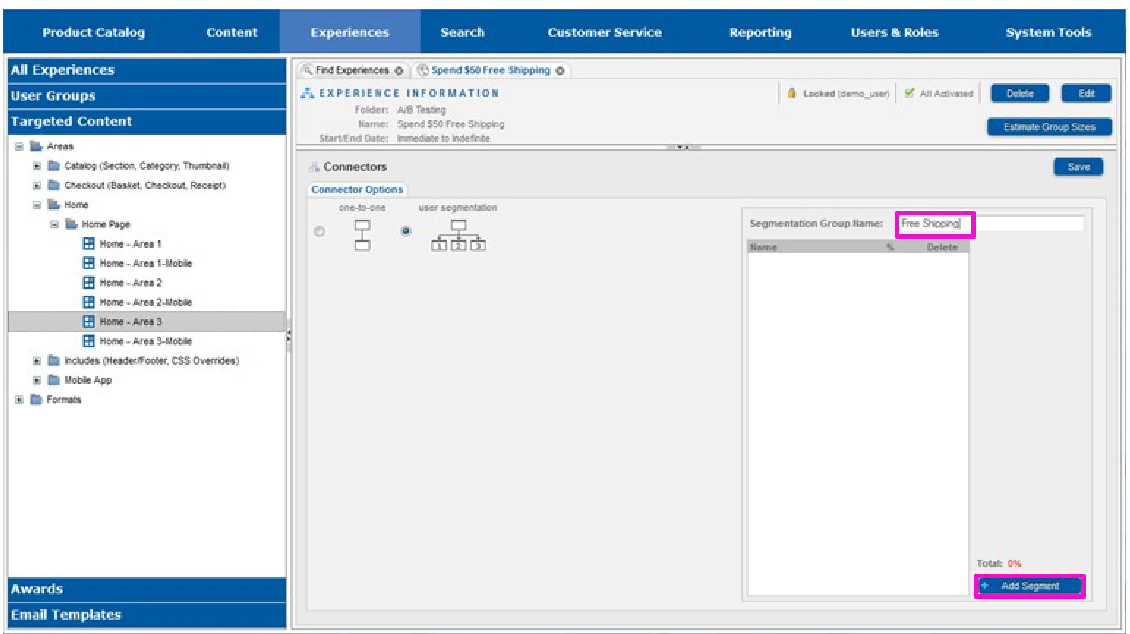


A segmentation list box will appear on the right.

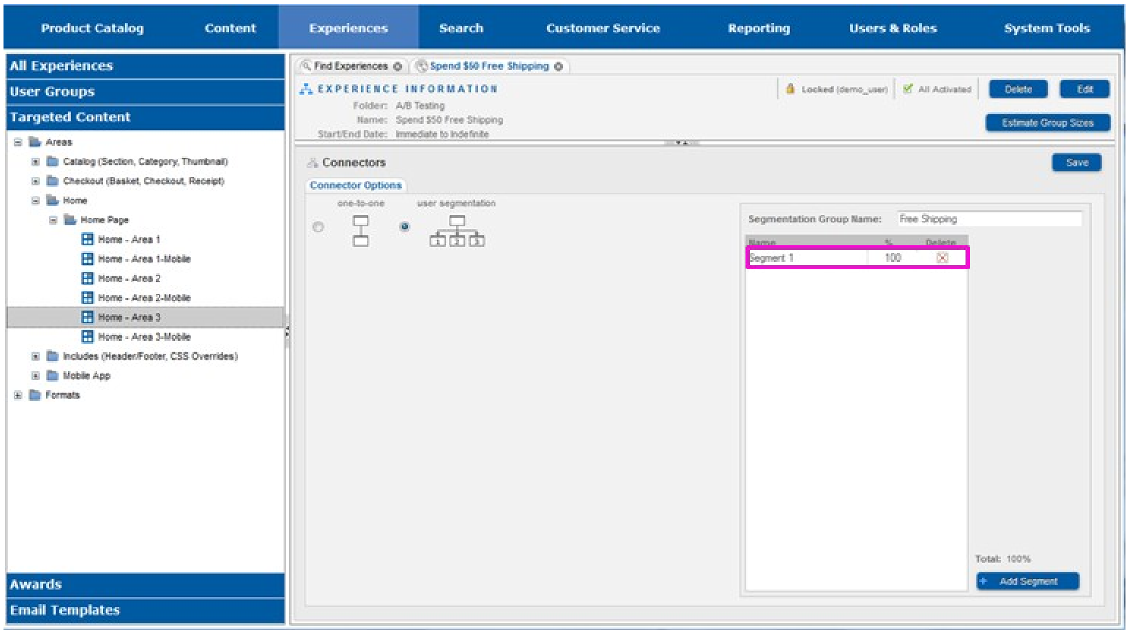


⇒ Enter a name for the segmentation in the SEGMENTATION GROUP NAME entry field.

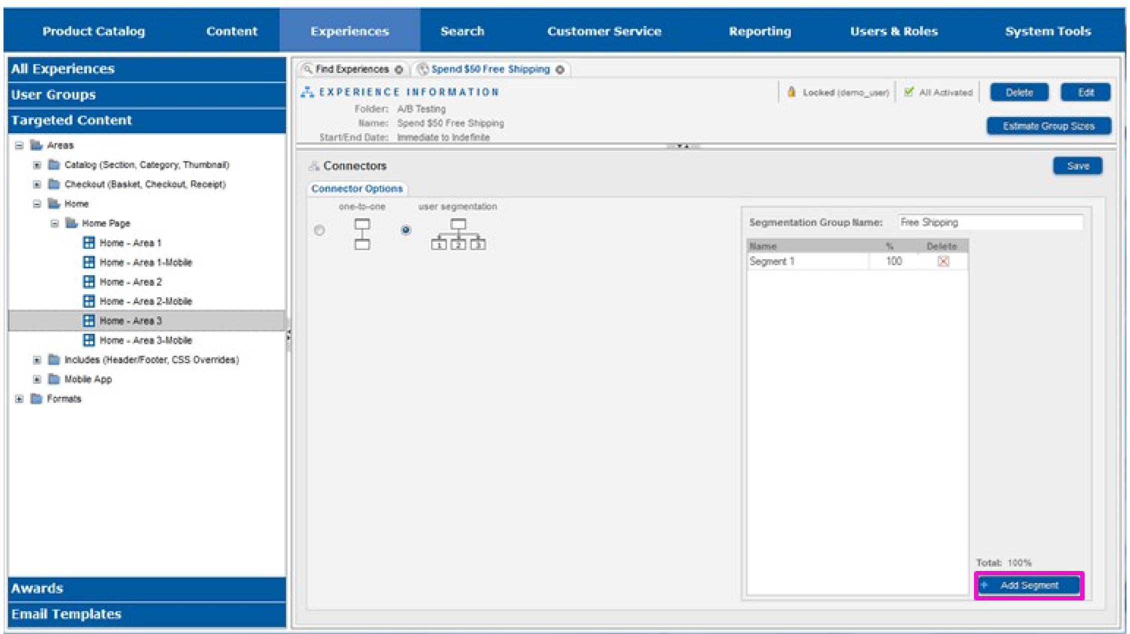
⇒ Select ADD SEGMENT.



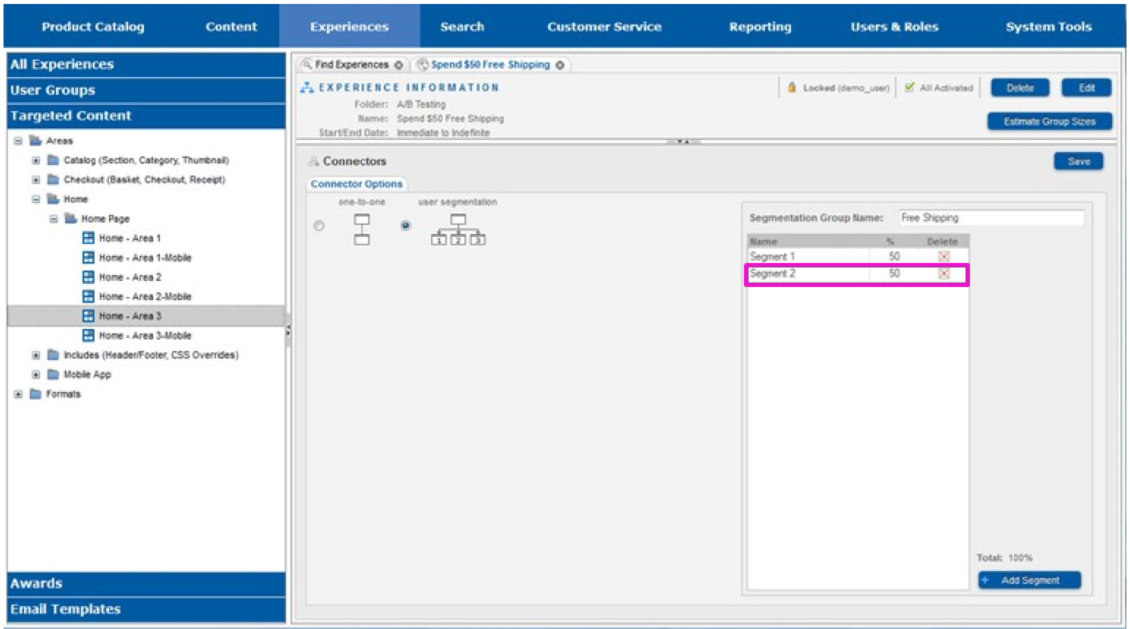
An entry for the segment will appear in the box.



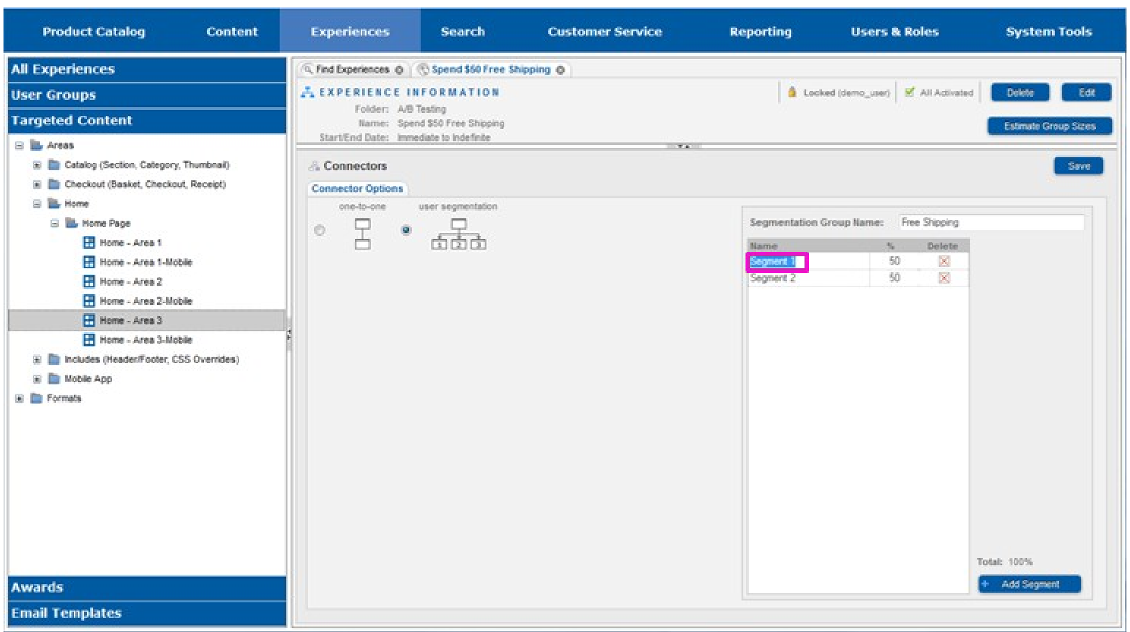
⇒ Select ADD SEGMENT again.



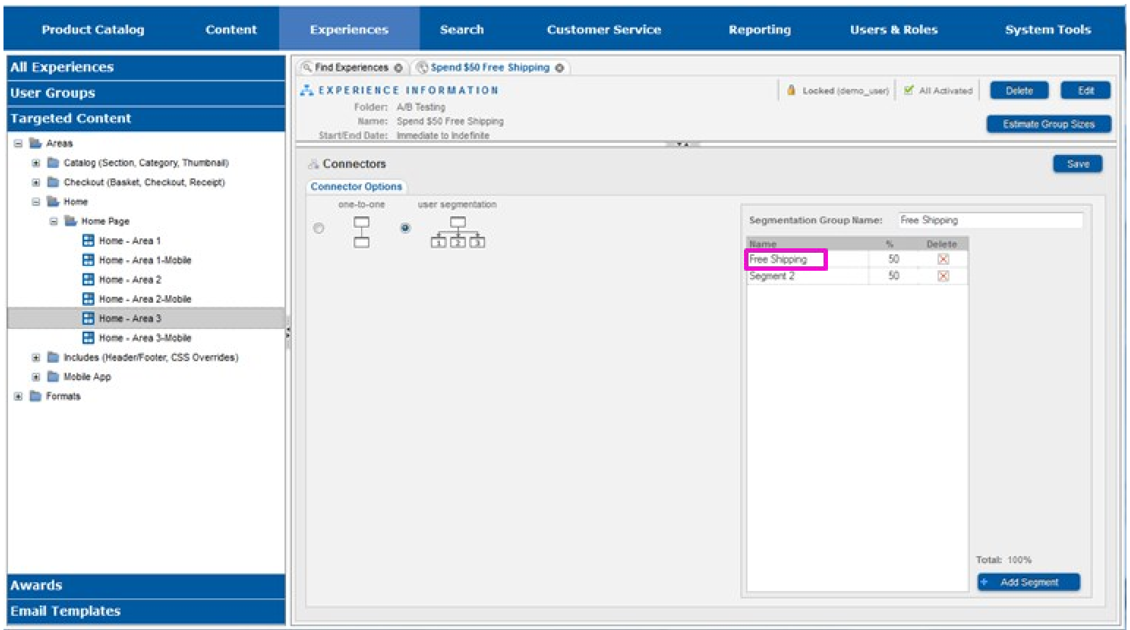
An entry for the second segment will appear in the box.



⇨ Select the name of the first segment.

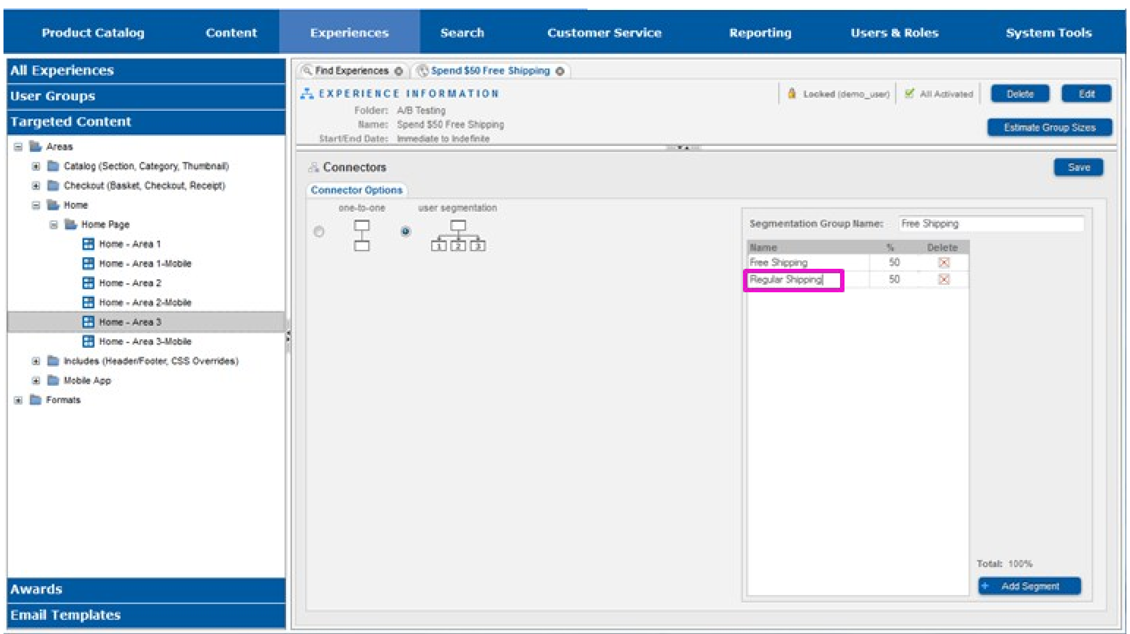


⇨ Enter a descriptive name for the first segment.

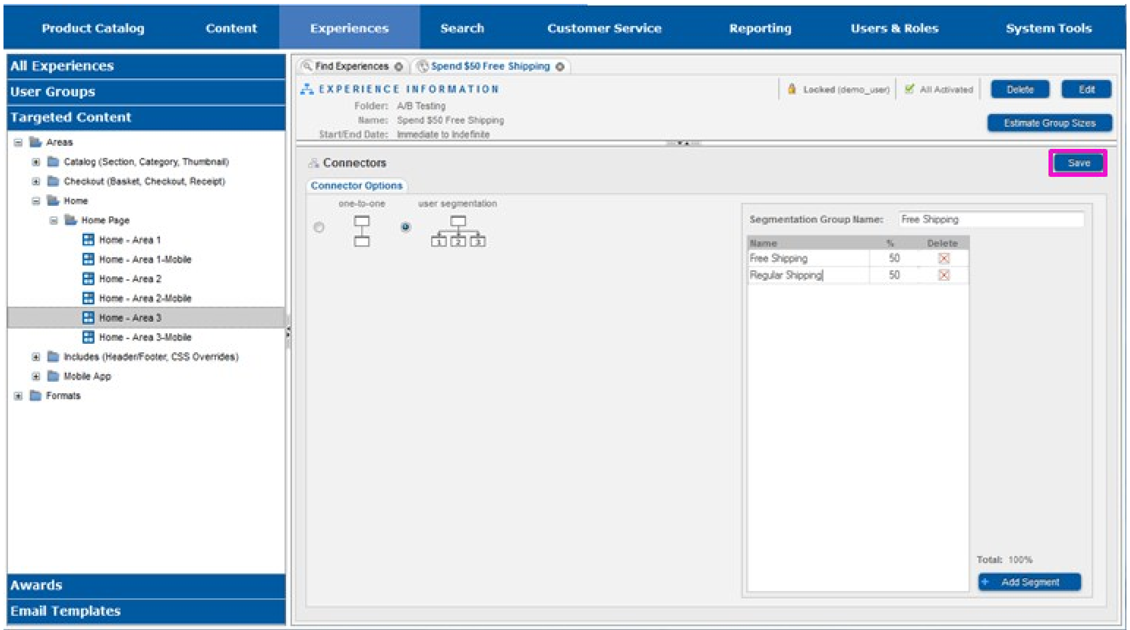


⇒ Select the name of the second segment.

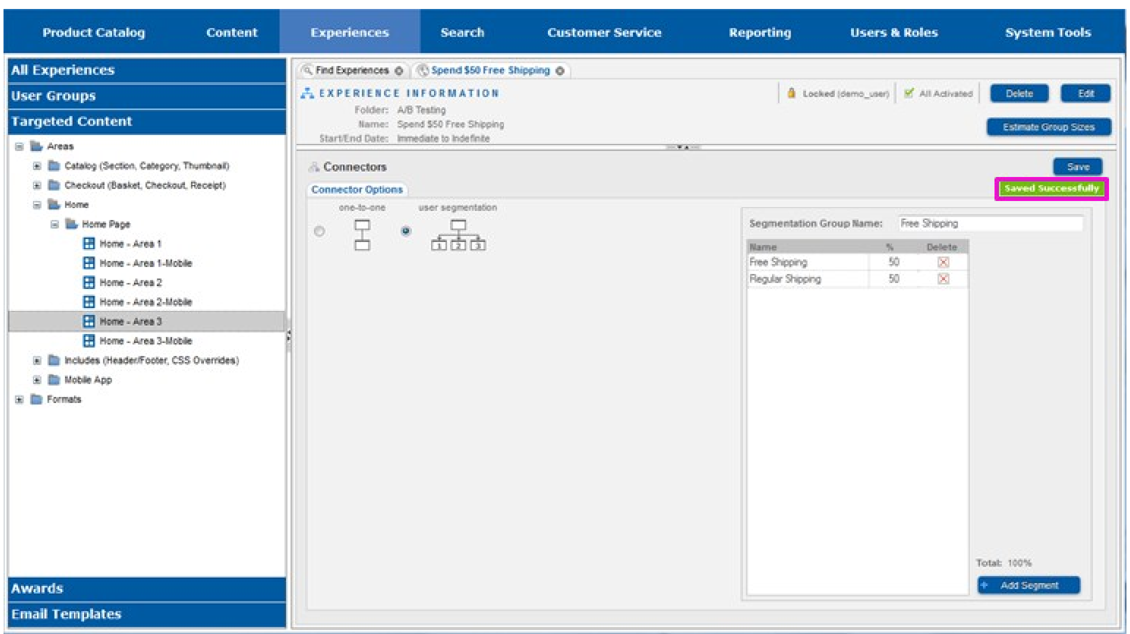
⇒ Enter a descriptive name for the second segment.



⇒ Select SAVE.

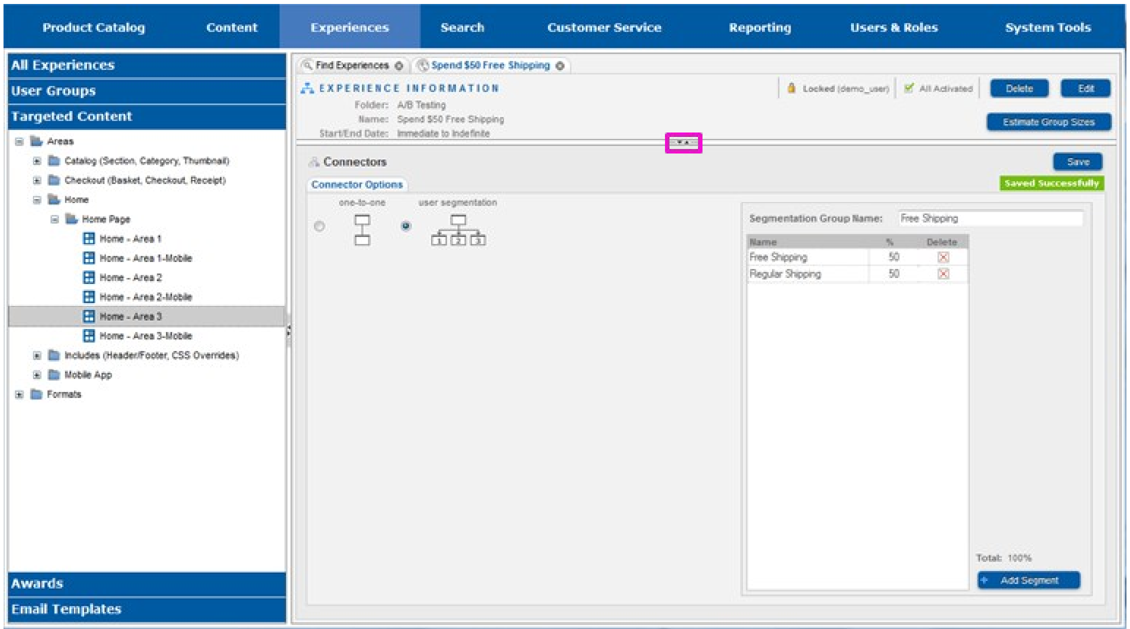


You will see a message indicating the save was successful.

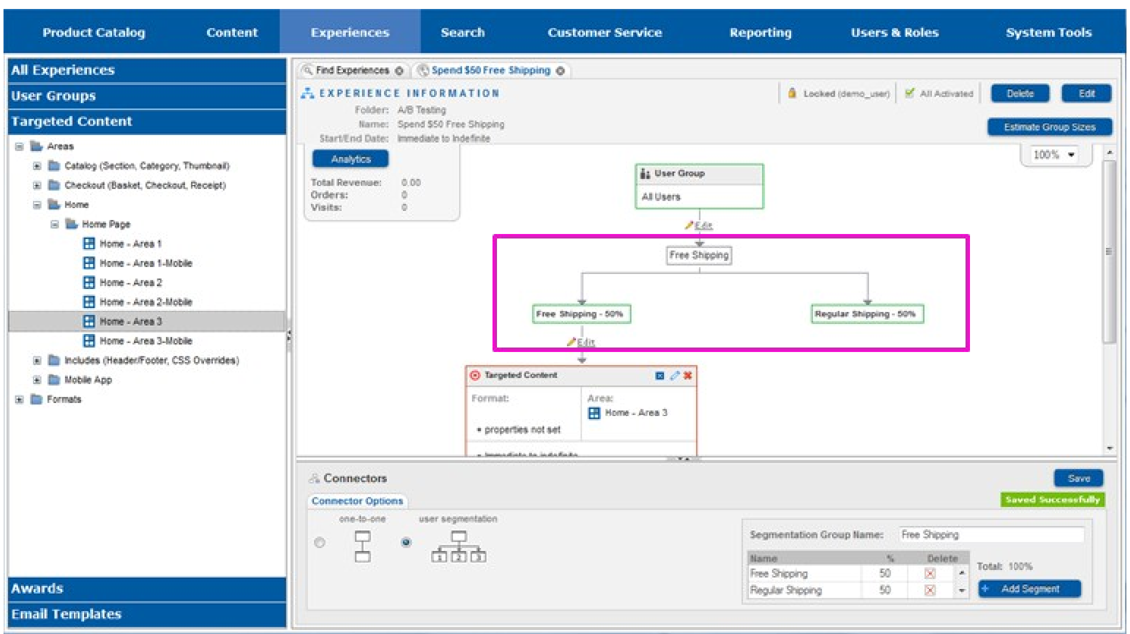


The properties pane can now be returned to its default size.

⇒ Select the down arrow on the divider between the work pane and the properties pane.



The properties pane will return to its default size, and you will see the connector with its two segments. The segment on the left is the portion of the visitors that will be offered free shipping, while the segment on the right is the portion that will not.



See also

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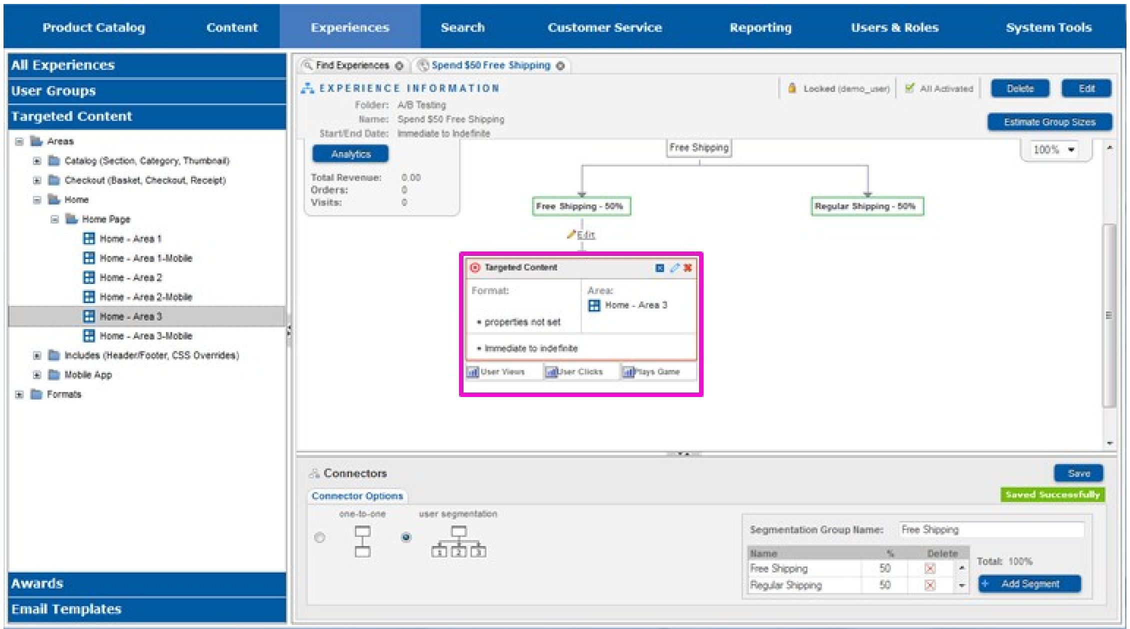
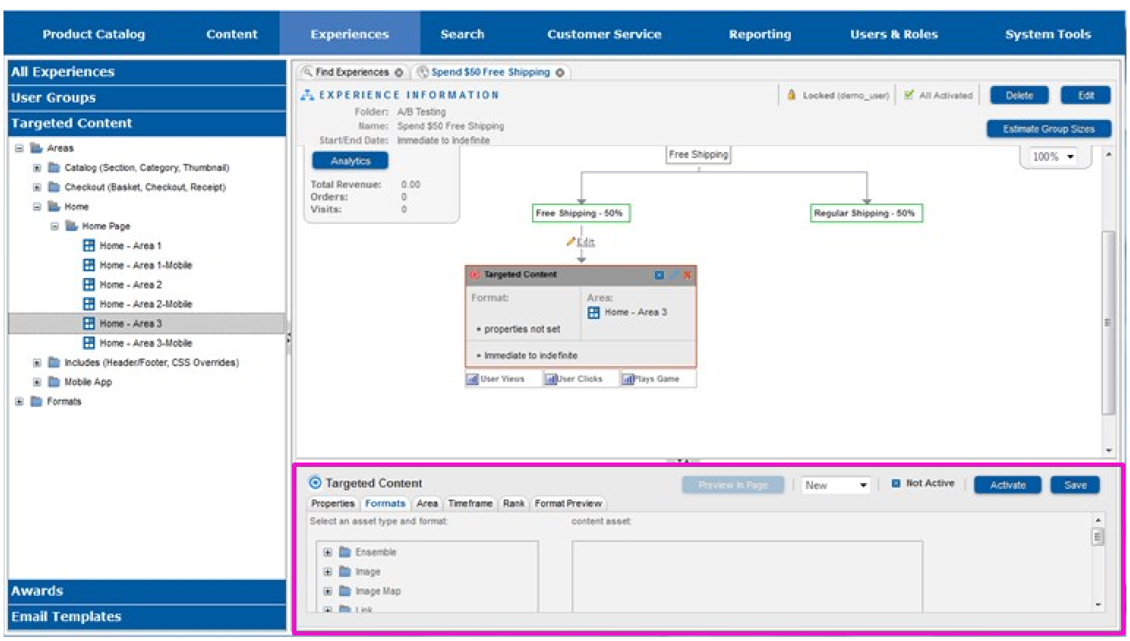
Complete the Targeted Content Node

The targeted content node that was added in section Add a Targeted Content Node should now be visible in the work pane. If it is not visible, scroll the work pane until it is. We will be completing the set up of that node.

⇨ Select the targeted content node.

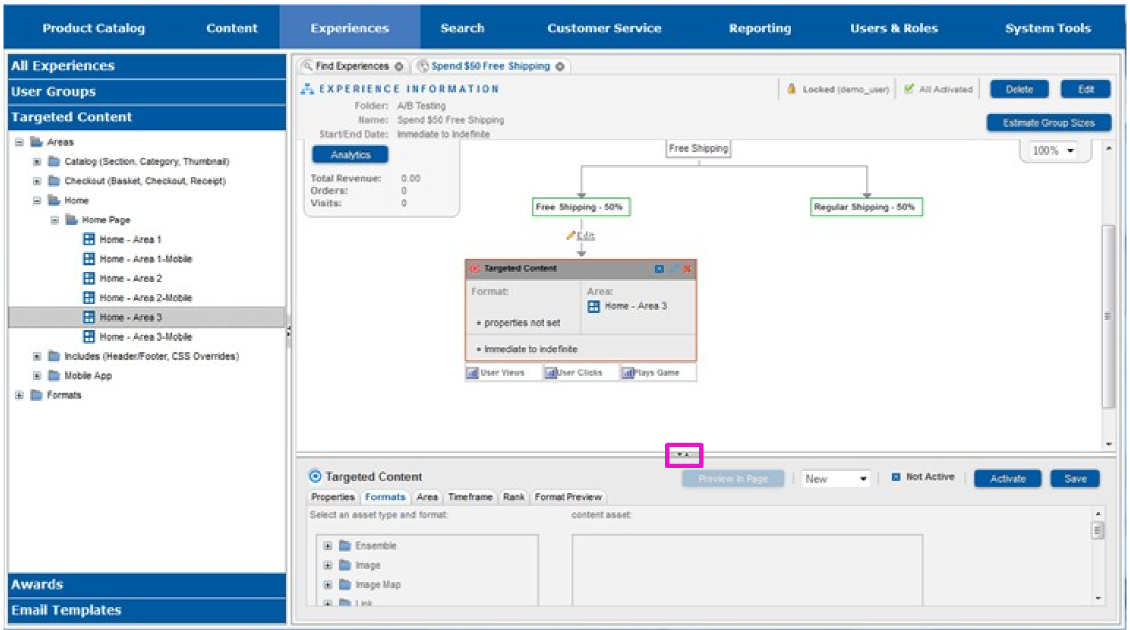


The properties pane will fill with the information for the targeted content node.

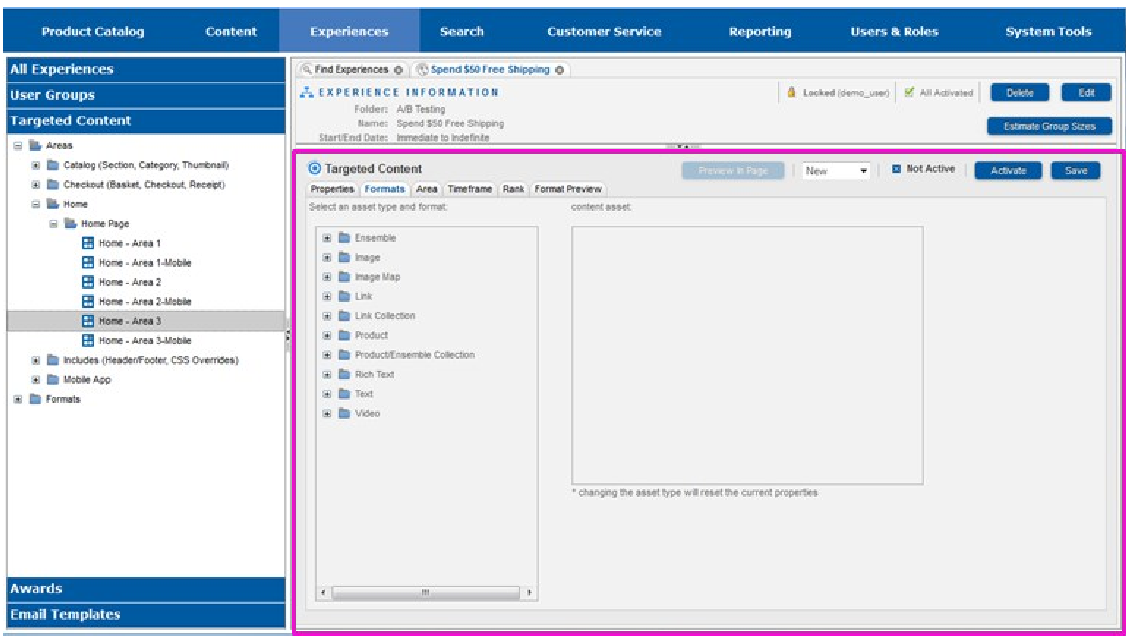


The properties pane should be maximized for easiest use.

⇨ Select the up arrow on the divider between the work pane and the properties pane.



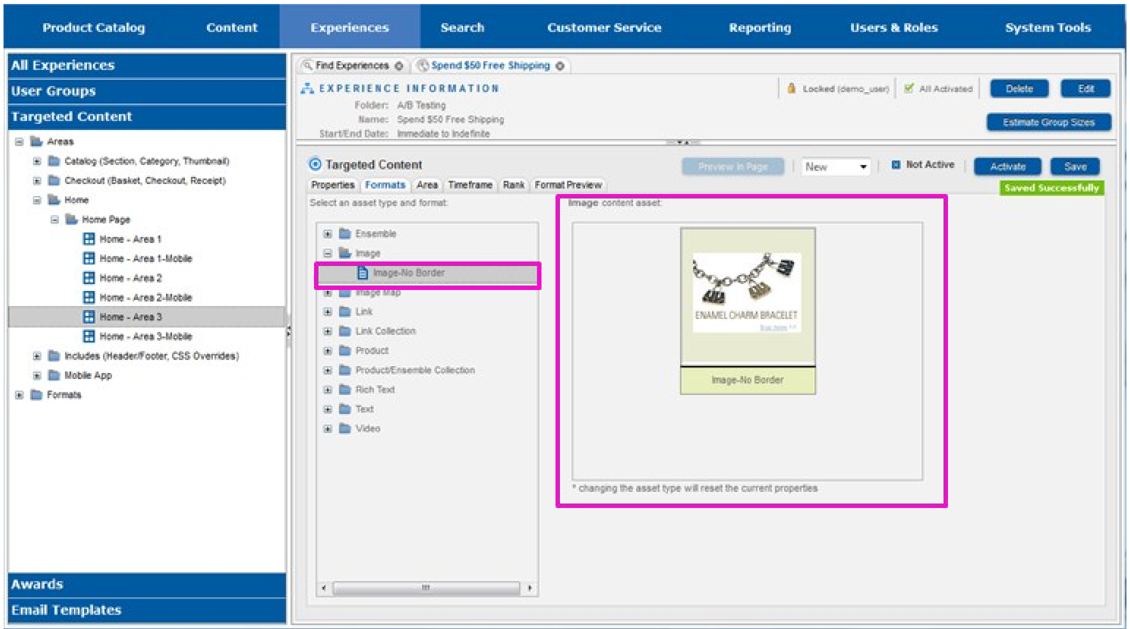
The properties pane will fill the screen and you will see the entire information in it.



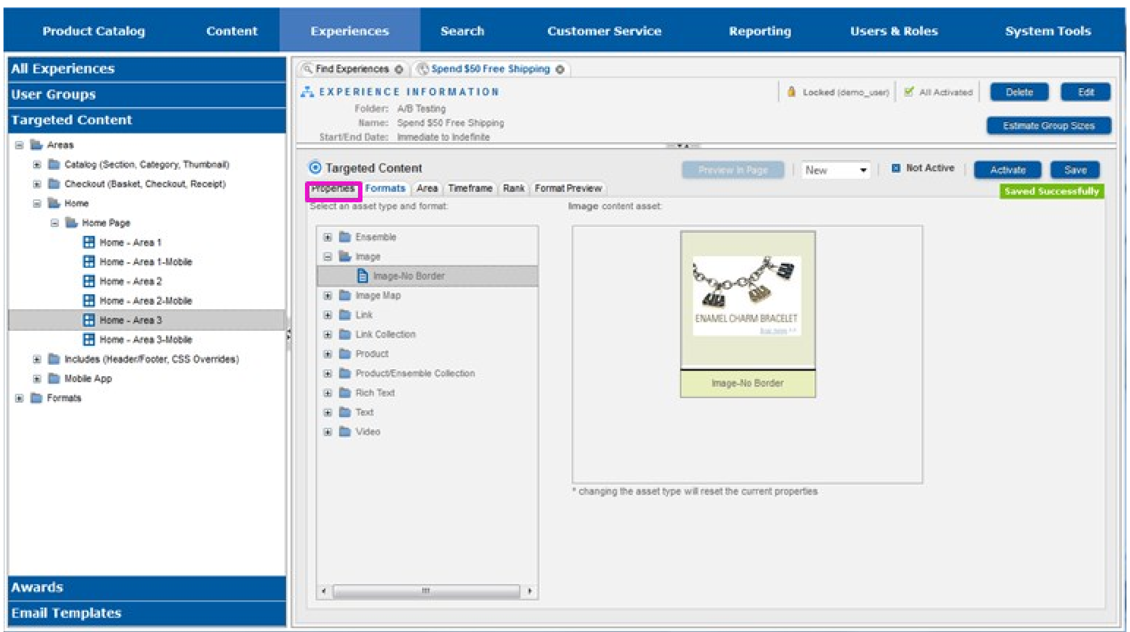
⇒ Expand the ASSET TYPE AND FORMAT navigation tree until you reach the asset type and format you want to use.

⇒ Select the asset type and format.

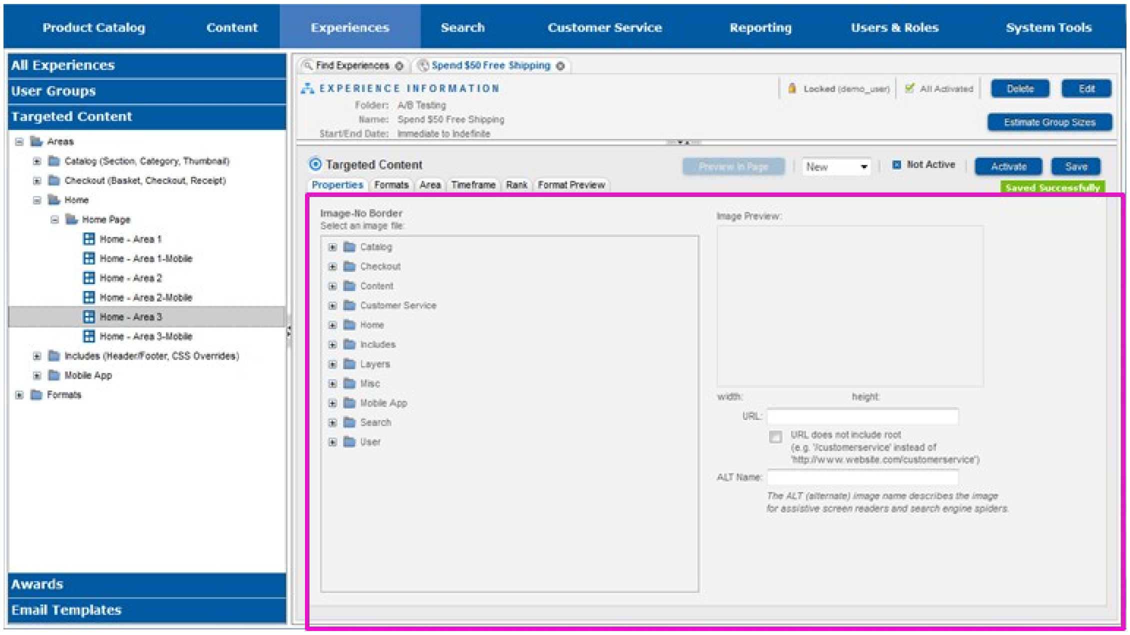
A sample of the asset, using that format, will appear on the right. This sample only shows how the asset looks using the selected format and is not the content you will be displaying on the site.



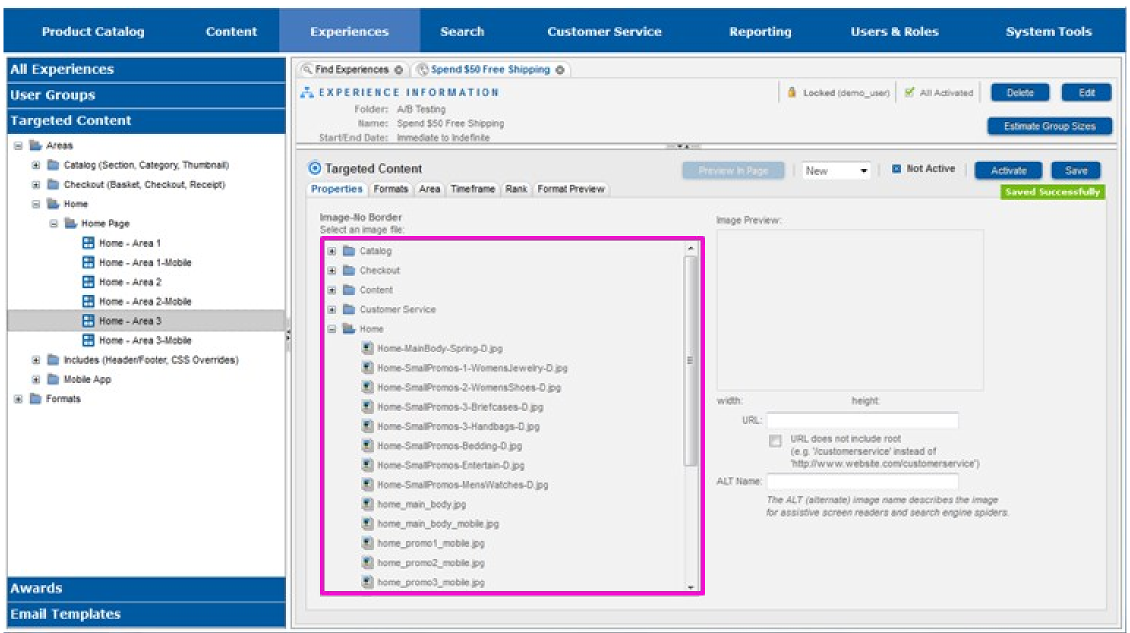
⇨ Select the PROPERTIES tab.



The content of the properties tab fills the pane. In this tab you will select the specific content that you want to display.

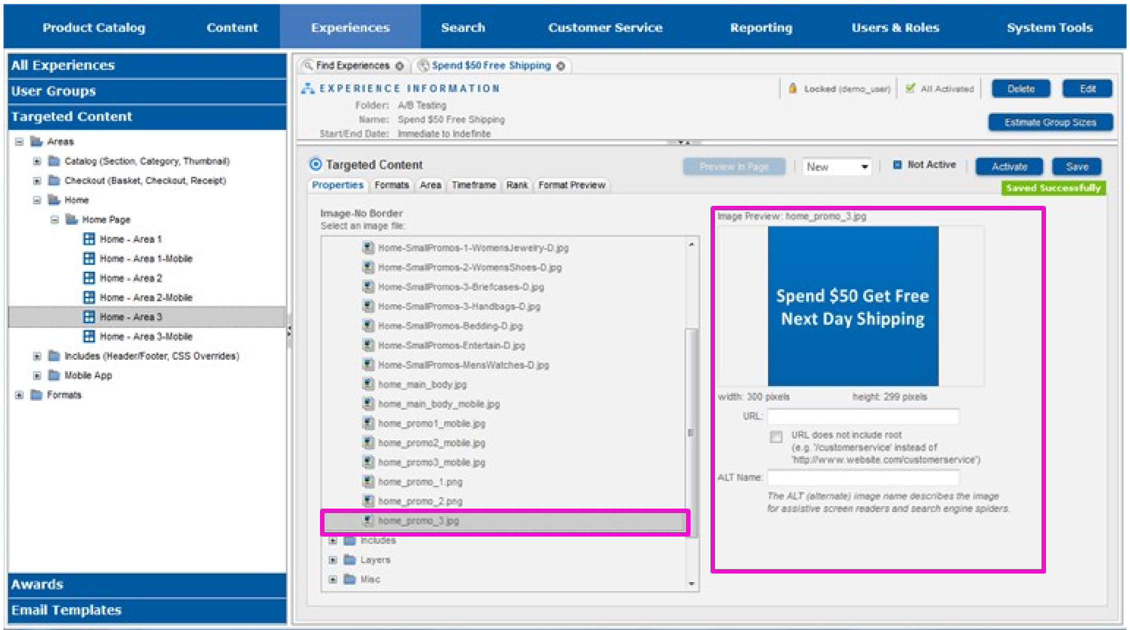


⇒ Expand the tree on the left until you locate the content you want to display.



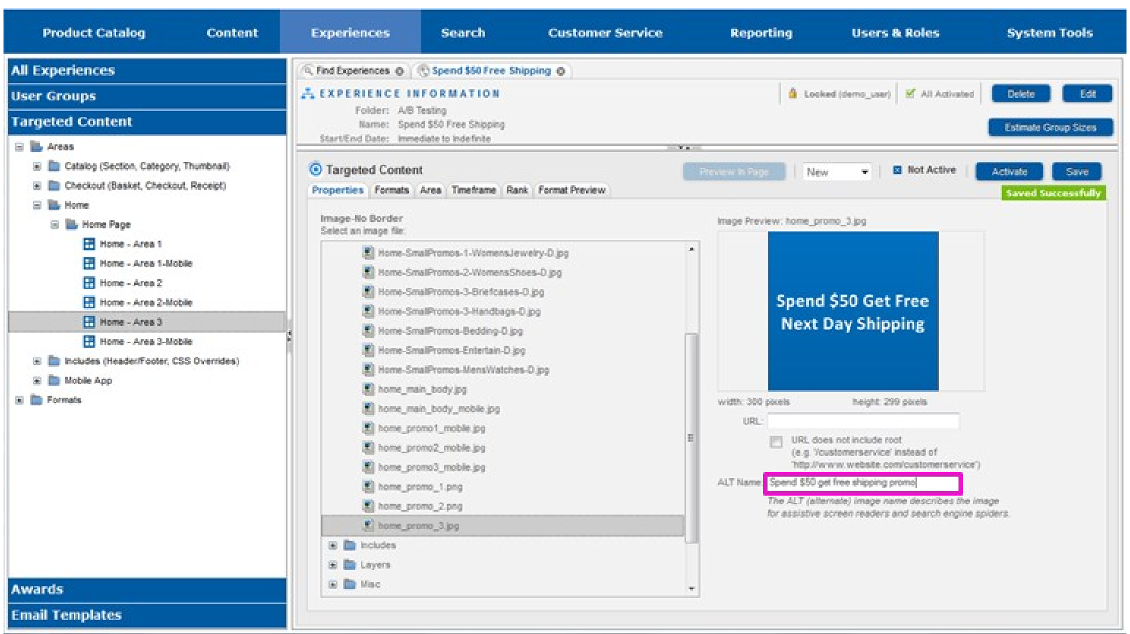
⇒ Select the content.

A preview of the content will appear on the right.

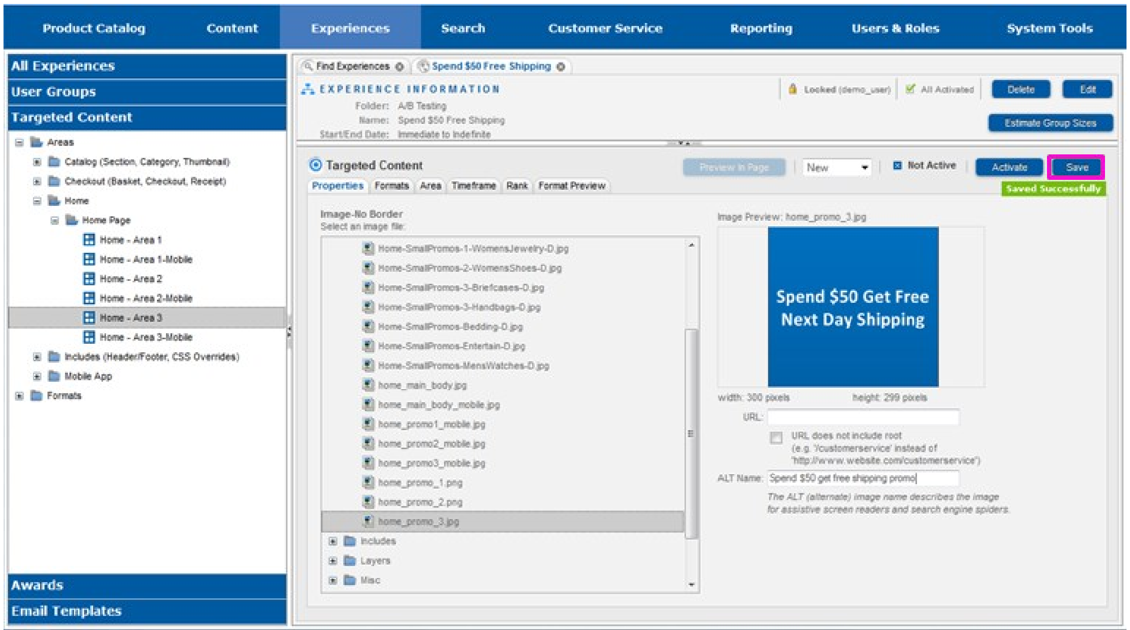


Alternate text must be entered for all image files.

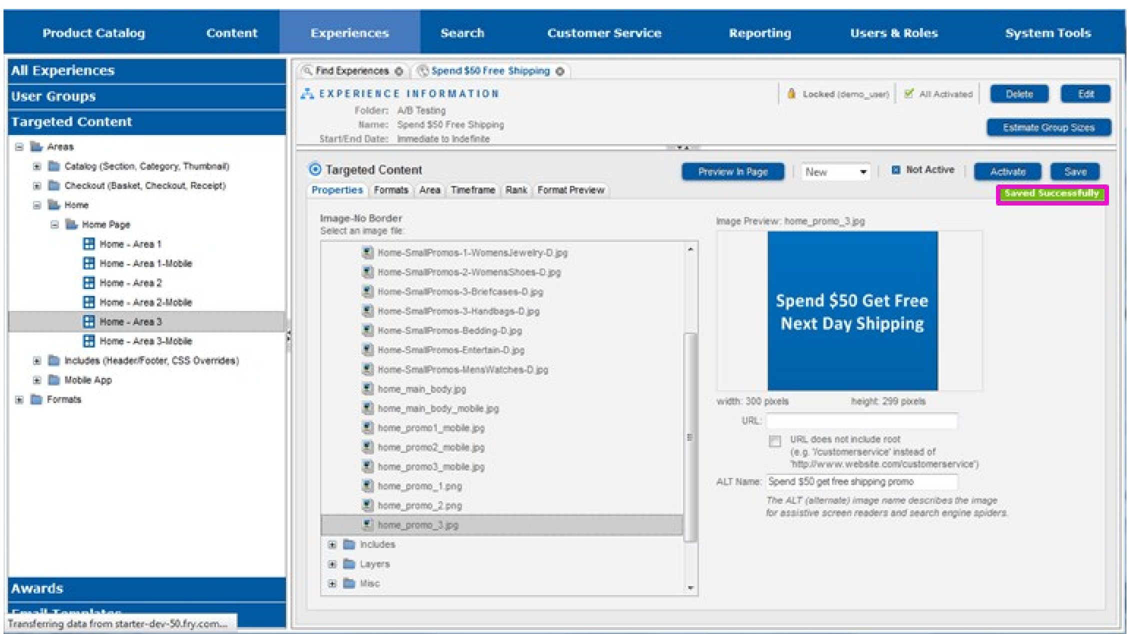
⇨ Enter alternate text for the image in the ALT NAME text field.



⇨ Select SAVE.

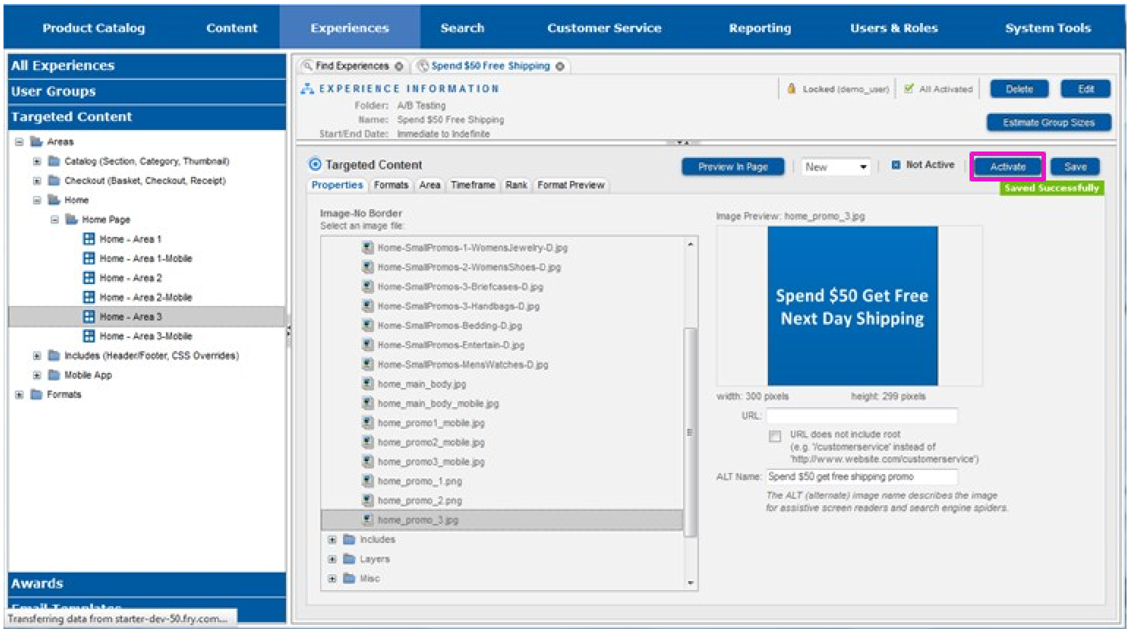


The content will be saved and a message indicating the save was successful will be displayed.

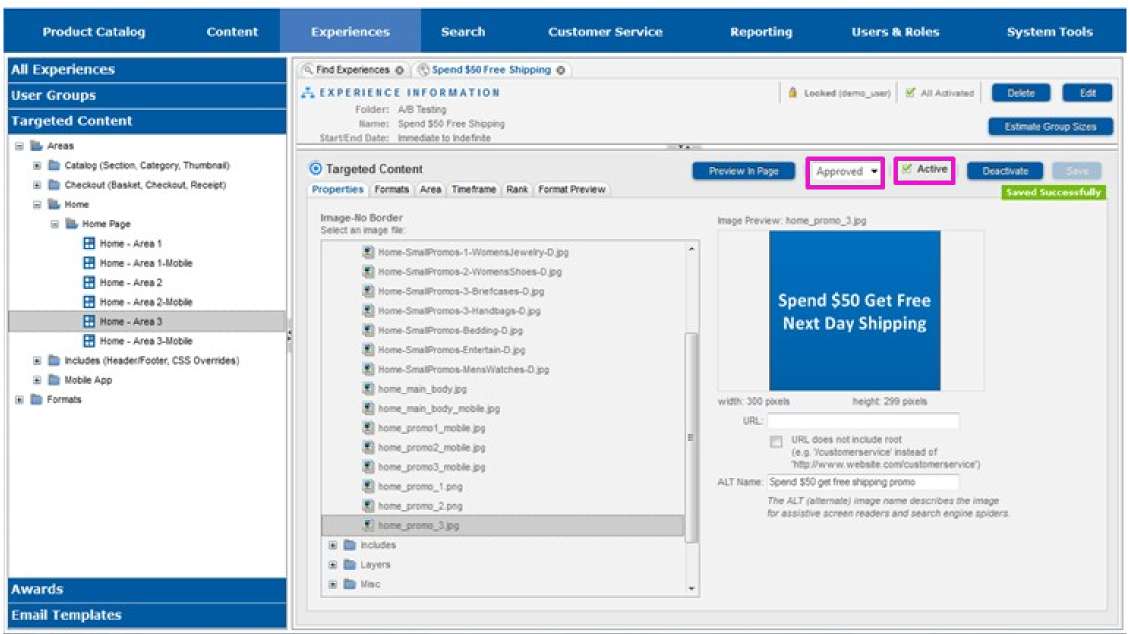


Although saved, the content is still inactive and will not be displayed until activated.

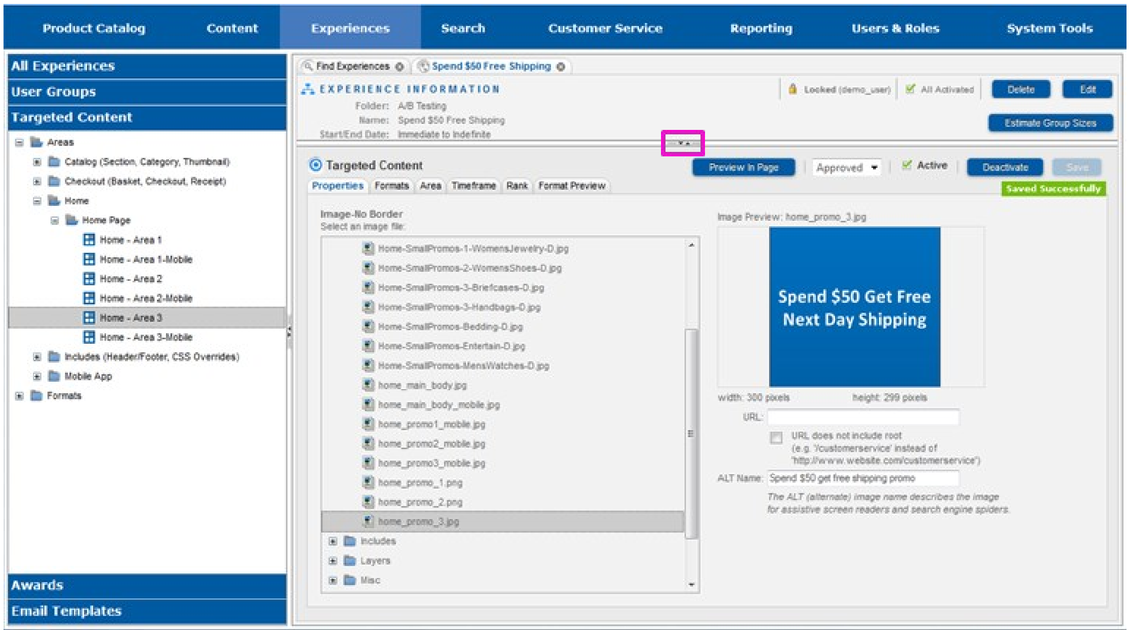
⇒ Select ACTIVATE.



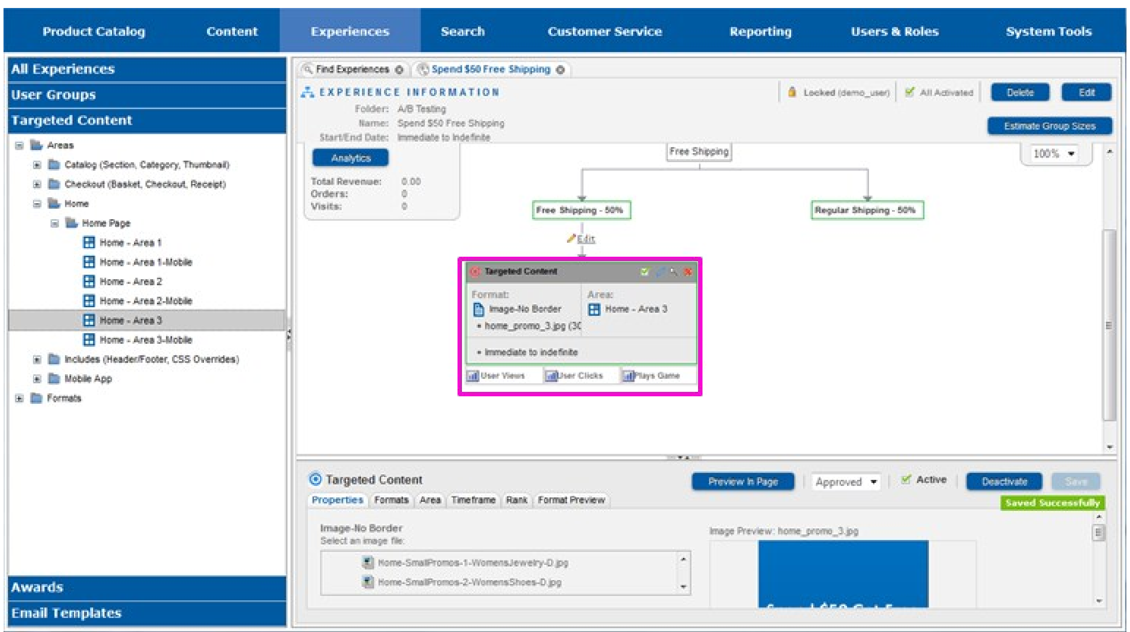
The pane will refresh and you will see that the status is changed to ACTIVE and the workflow is changed to APPROVED.



⇨ Select the down arrow on the divider between the work pane and the properties pane.



The properties pane will return to its default size and you will see the activated targeted content node.



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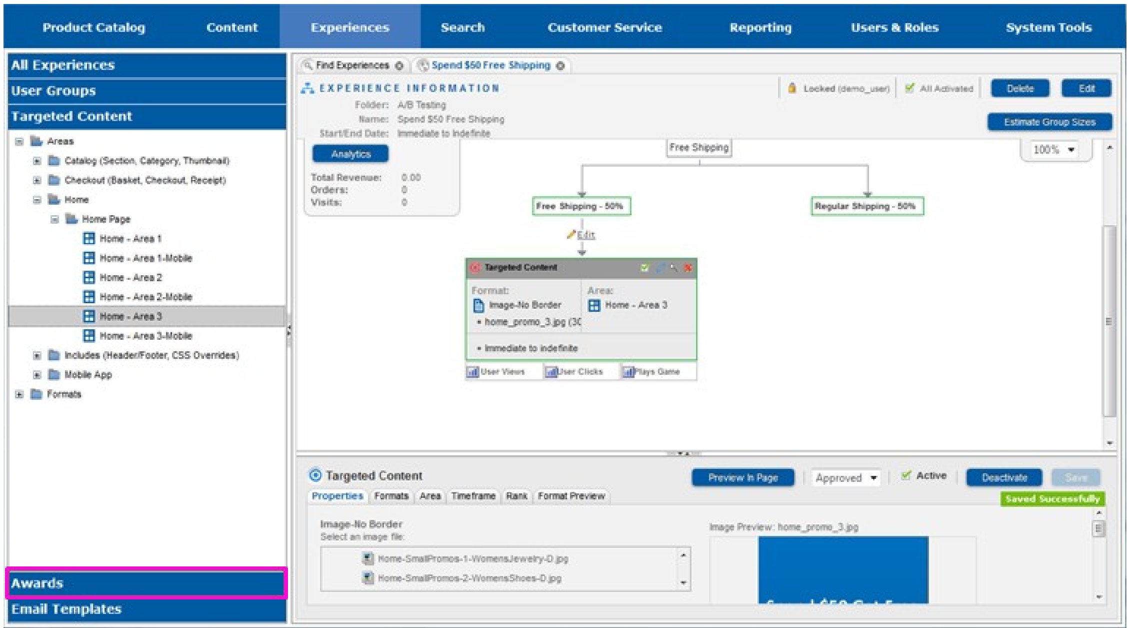
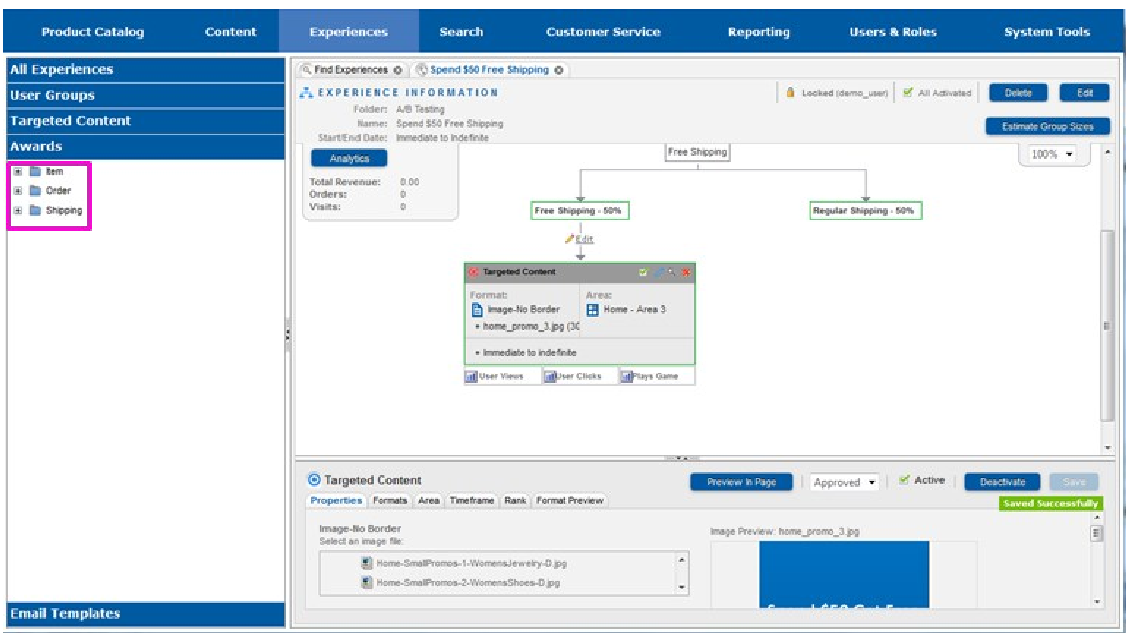
Add an Award Node

The targeted content node that was added in the last section should be visible in the work pane. If it is not, scroll the work pane until it is.

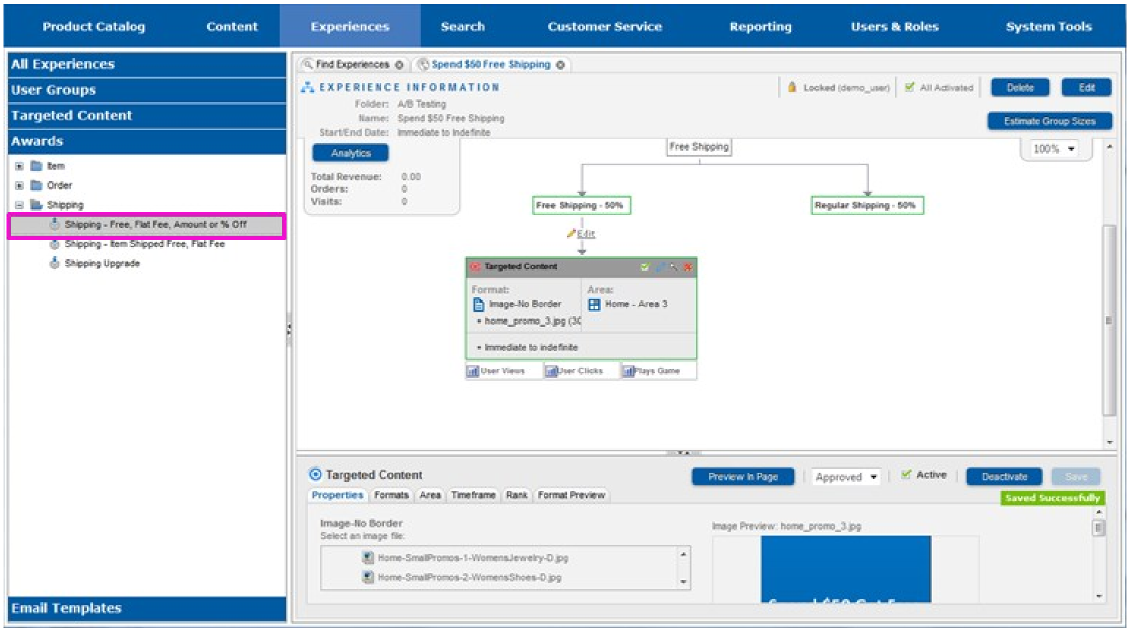
⇒ Select the AWARDS sliding header in the left hand navigation pane.



The awards header will move up and you will see a folder tree of available awards.



⇒ Expand the list of awards until you see the one you want to add to the experience.



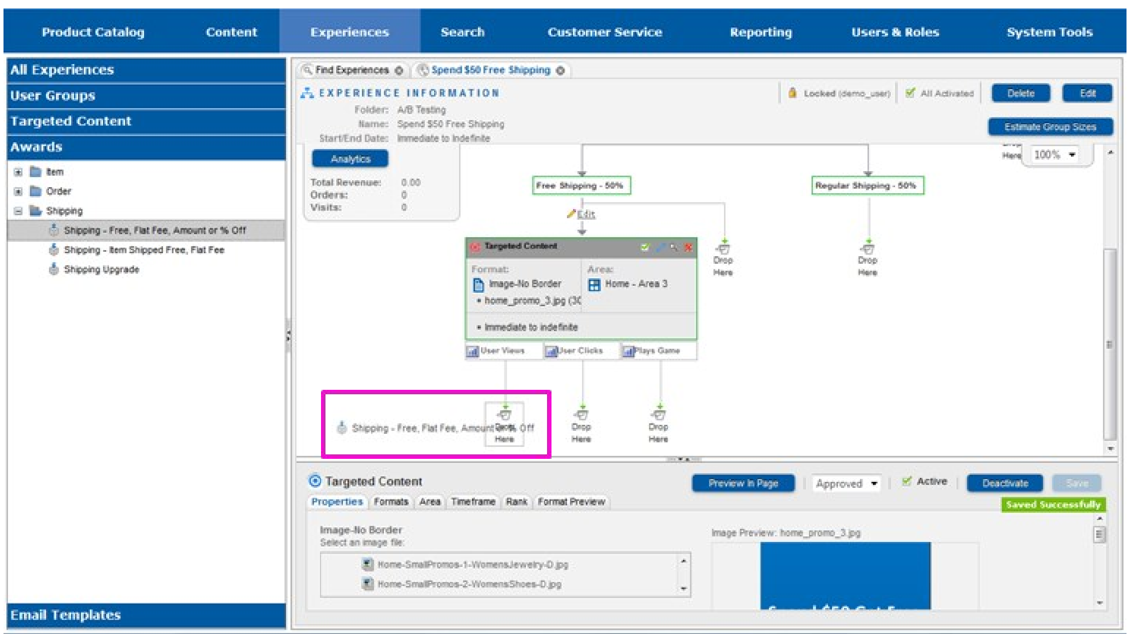
⇒ Select the award you want to add.

⇒ Drag the award into the working pane.

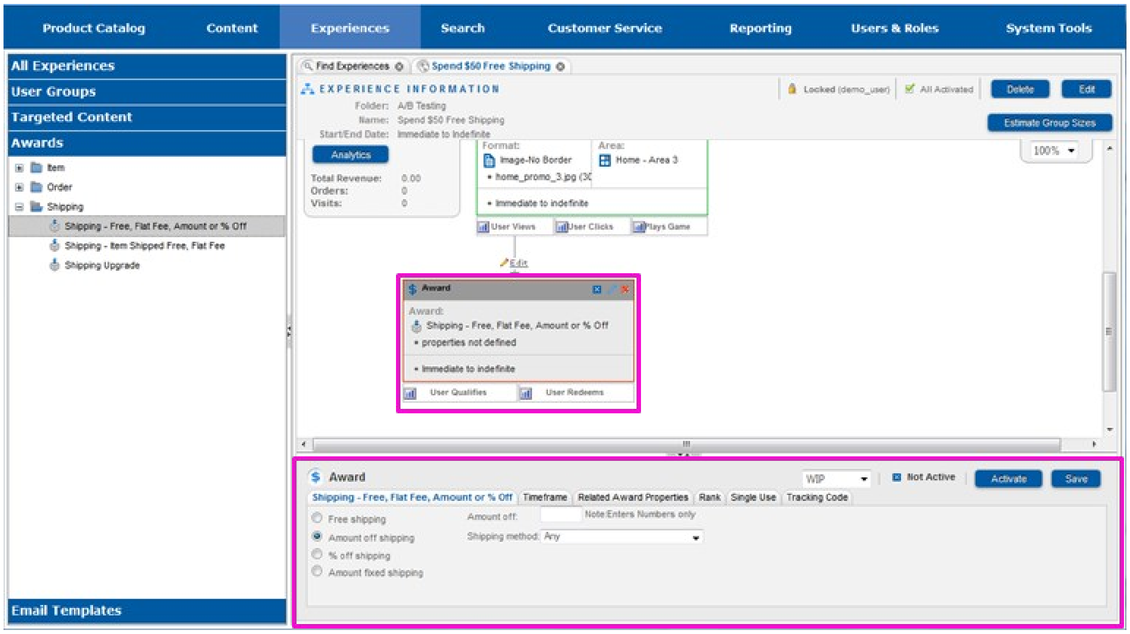
Drop points will appear in the working pane.

⇒ Position your mouse over the drop point under the USER VIEWS connector of the targeted content node.

⇒ Release the mouse button.

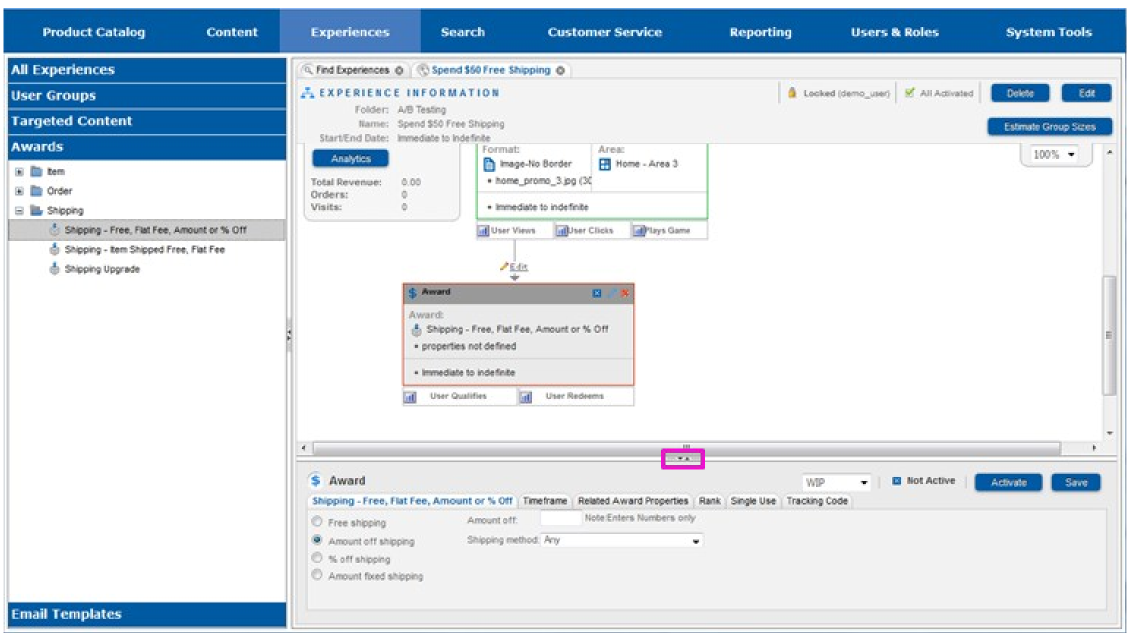


An award node will appear in the working pane, and properties pane will fill in with the properties for the award.

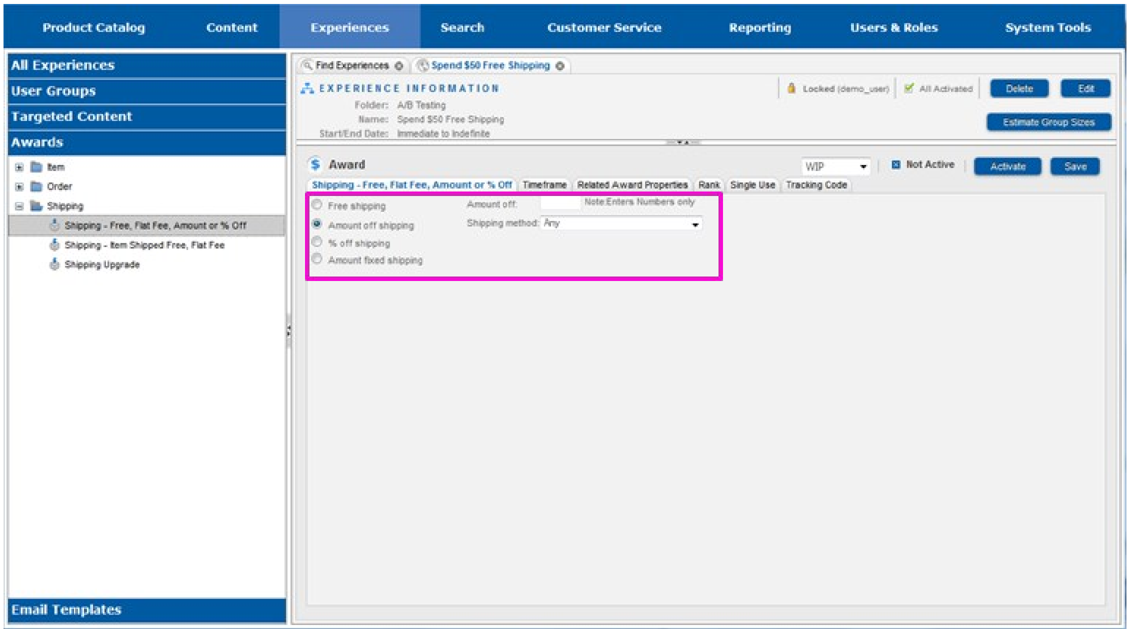


The properties pane should be expanded for easiest use.

⇒ Select the up arrow on the divider between the work pane and the properties pane.

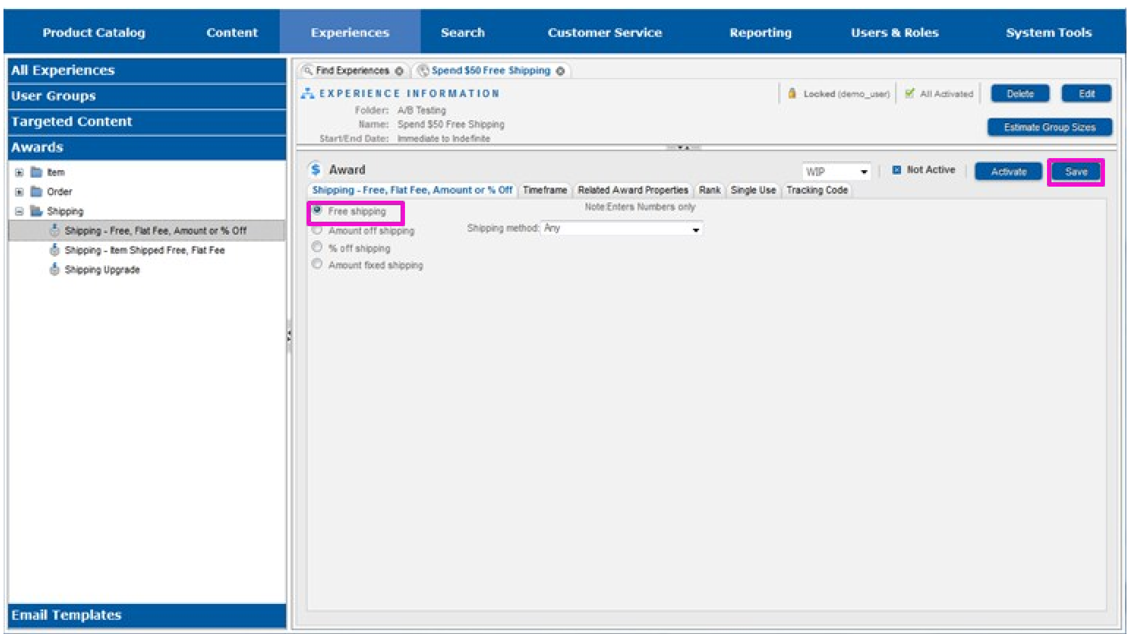


The properties pane expands, and you can see all the properties for the award.

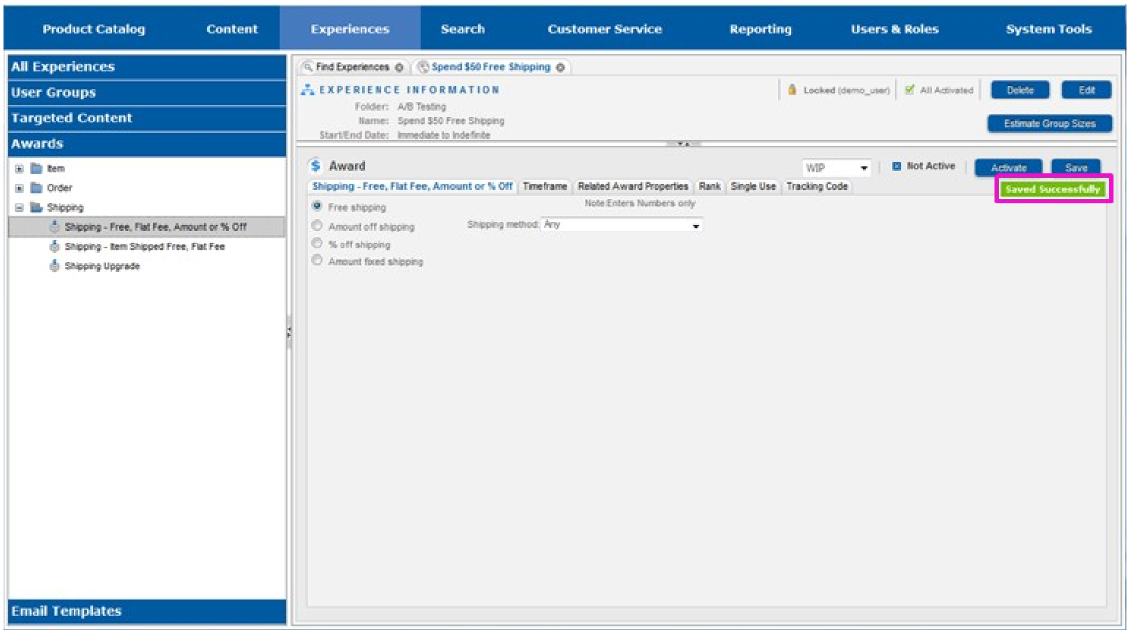


⇒ Select FREE SHIPPING.

⇒ Select SAVE.

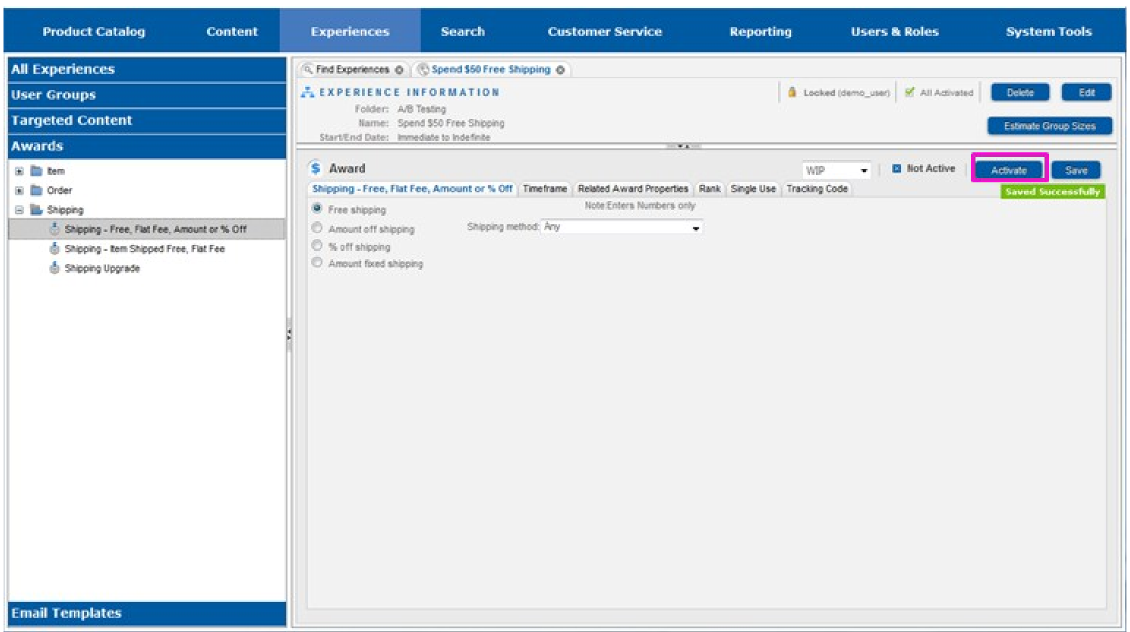


The award will be saved and you will see a message indicating that.

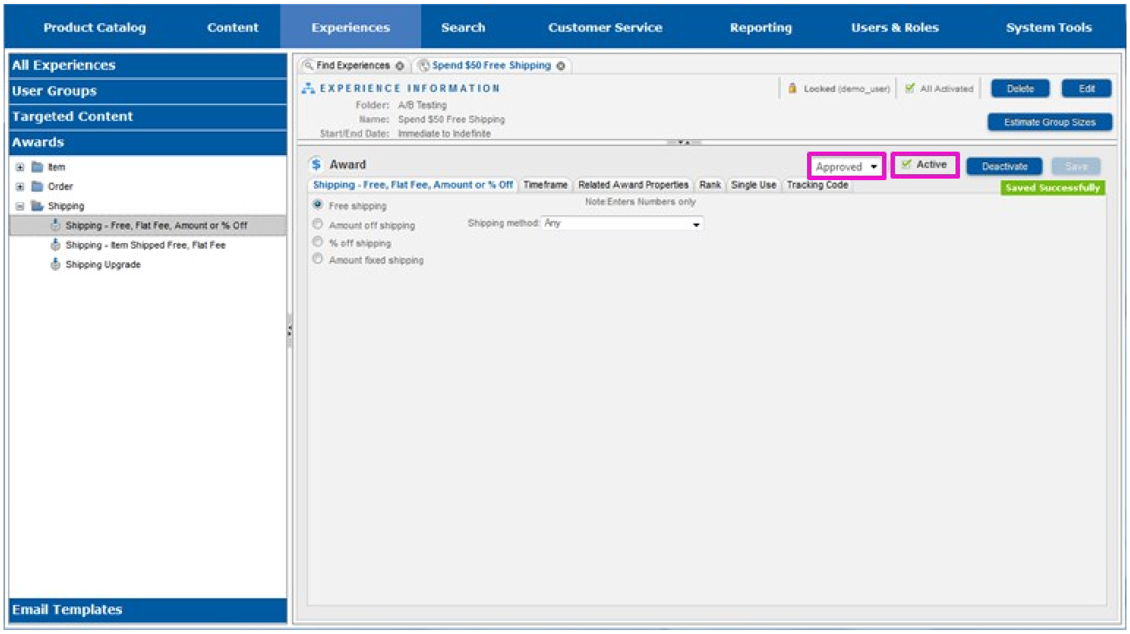


Although the award is saved, it is still inactive. Inactive awards will not be available on the site.

⇒ Select ACTIVATE.

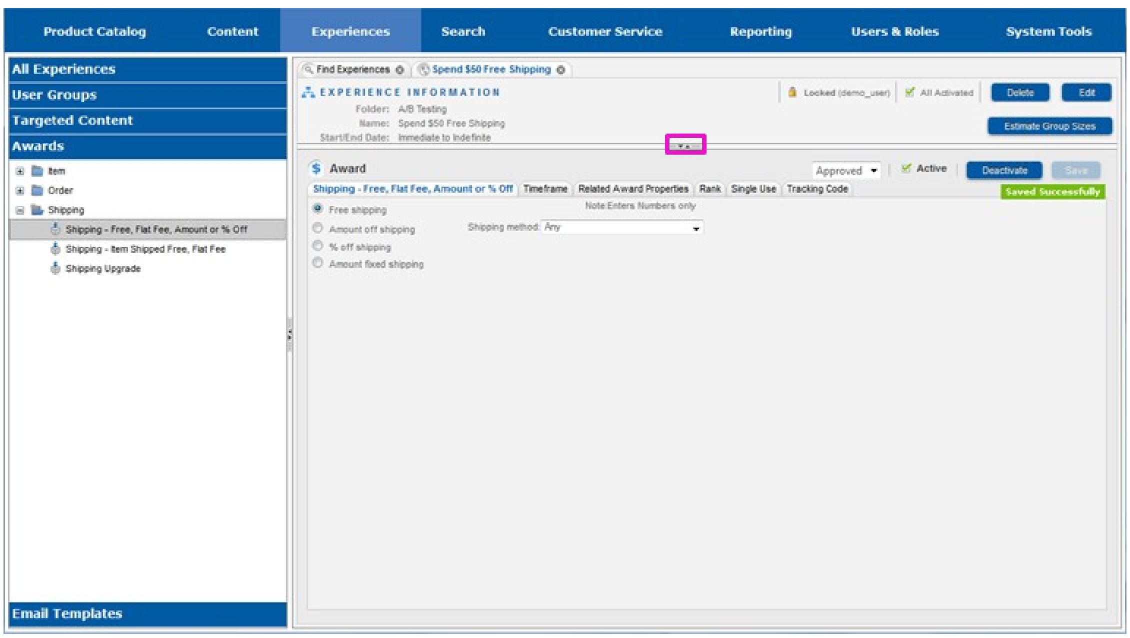


The properties pane will refresh and you will see that the status has changed to ACTIVE and the workflow has changed to APPROVED.

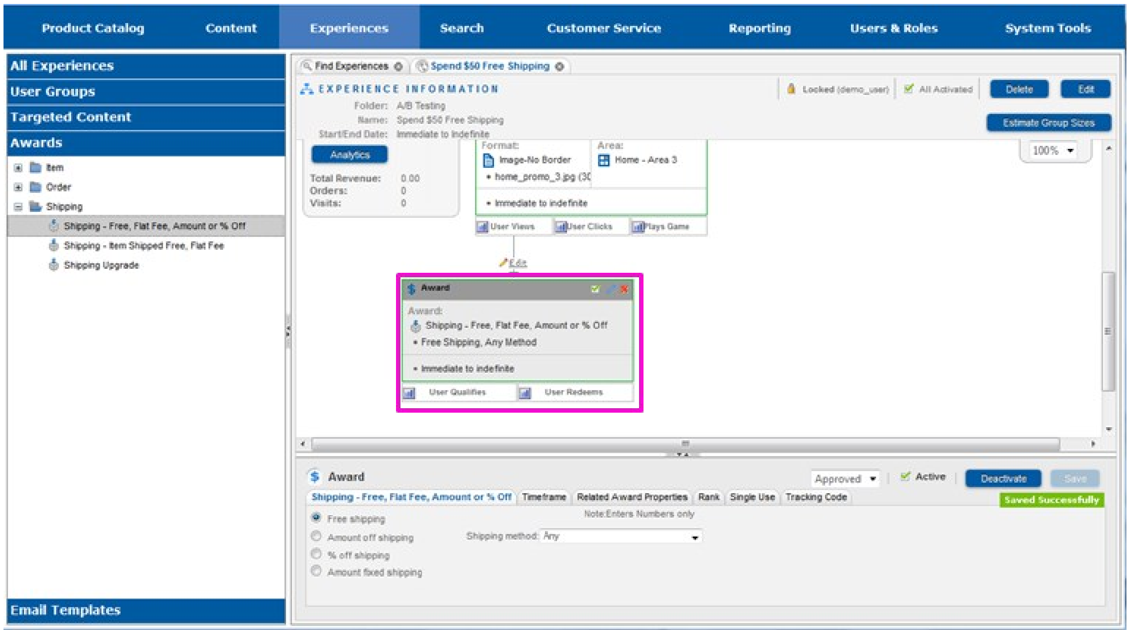


The properties pane can now be returned to its default height.

⇒ Select the down arrow on the divider between the work pane and the properties pane.



The properties pane resizes to its default height and you can see the award node. The working pane can be scrolled if desired, in order to view the entire awards node.



See also

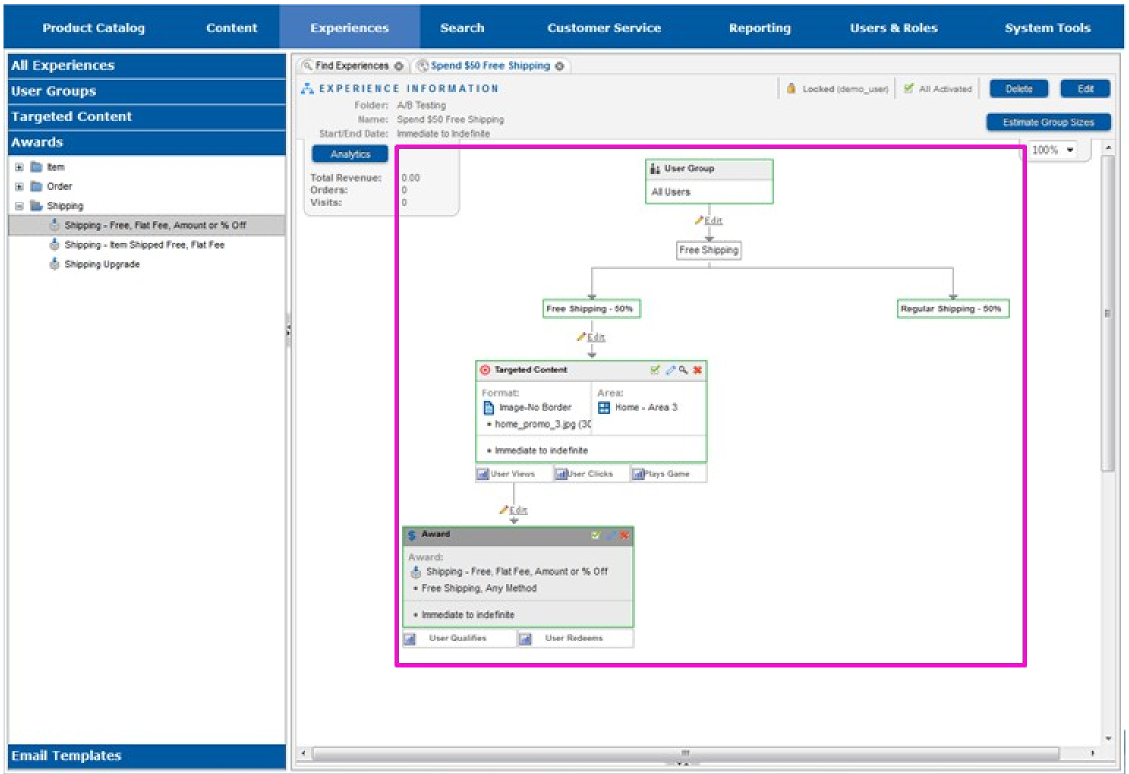
Before You Begin
The Example Used
Create the Experience
Add a Targeted Content Node
Segment the Users
Complete the Targeted Content Node
Result: The Entire Experience

Home > Tutorials > Creating an Experience for an A/B Test > Result: The Entire Experience

Result: The Entire Experience

The screenshot below shows the entire experience that was created.

The branch near the top of the experience shows that half the visitors to the site will be directed along the FREE SHIPPING connection, and half will be directed along the REGULAR SHIPPING connector. Those who are directed along the FREE SHIPPING connection will see targeted content on the home page, and will be awarded free shipping. Those who are directed along the REGULAR SHIPPING connector will not see any changes from the regular site. (Note that they may qualify for other experiences that may modify what they experience on the site, but this experience will not modify anything for them.)



See also

Before You Begin
The Example Used
Create the Experience
Add a Targeted Content Node
Segment the Users
Complete the Targeted Content Node
Add an Award Node

Creating Dynamic Attributes

This tutorial describes how to create new dynamic attributes for use with the products on the site. Dynamic attributes are attributes that can be associated with products as needed, but products are not required to have them. Dynamic atttributes are grouped into attribute groups, which are then associated with product types. If a product is assigned a product type, then the product has access to the dynamic attributes in each attribute group associated with the product type.

How you progress through this tutorial depends upon the number of items you need to create, versus using existing items. The simplest case is adding a new dynamic attribute to an existing attribute group that is already associated with a product type. The most complex case is creating a new attribute group for a new dynamic attribute and creating a new product type for the attribute group to be associated with. Select which sections of this tutorial to follow based upon which items you need to create.

Conventions Used in this Tutorial

SMALL CAPS: Items that appear in small caps refer to text items on the application. If you are viewing the application, you should see a label, menu, or button with the same text on it.

⇒: Arrows appear at the beginning of areas that contain a task you should perform. When you see the arrow, you should perform the described task.

: Pink outline boxes are used to highlight areas of screenshots that are being referred to in the text. These are used to call attention to a particular area of the screen, but you will not see those boxes on your screen when you are using the application.

Articles in this section

See also

Adding Products To Categories
Adding Synonyms to the Thesaurus
Creating an Experience for a Promotion
Creating an Experience for an A/B Test
Creating New Products
Modifying Content
Working With Stores

Before You Begin

Dynamic attributes are created by using the Site Manager. Before you begin creating dynamic attributes, you should:

- Have a valid Site Manager log in and know how to access the Site Manager;
- Know how to navigate the Site Manager and find various sections in it;
- Be logged in to the Site Manager;
- Know the dynamic attribute(s) you wish to add;
- Know if you are adding the dynamic attribute to an existing attribute group, or if you are creating a new attribute group. If you are adding the attribute to an existing attribute group, you will need to know the name of that attribute group. If you are creating a new attribute group, you will need to know the details for that group so that you can create it;
- Know which product type to associate your new attribute with. If the product type already exists, you will need to know if the attribute group is already associated with the product type. If the product type does not exist, you will need to know the details of it so that you can create it.

See also

The Example Used
Determining the Attribute Group
Adding a Dynamic Atttribute to An Attribute Group
Optional - Adding an Attribute Group to a Product Type
Assigning Dynamic Attributes to a Product
Optional - Viewing the Product

The Example Used

The example used for this tutorial shows the creation of multiple dynamic attributes. The attributes created are all product level attributes and are associated with a product as a whole, instead of a specific variant (or SKU).

Steps are included to associate these dynamic attributes with an existing attribute group, or to create a new attribute group for them. The attribute group can then either be associated with an existing product type, or a new product type can be created for it. Steps are also included that describe how to set values for the new attributes for a product and then view the attributes on the web site.

See also

Before You Begin
Determining the Attribute Group
Adding a Dynamic Atttribute to An Attribute Group
Optional - Adding an Attribute Group to a Product Type
Assigning Dynamic Attributes to a Product
Optional - Viewing the Product

Determining the Attribute Group

Dynamic attributes are created through the attribute group they are associated with. The first step in creating dynamic attributes is locating the attribute group.

If the dynamic attribute you are adding will be associated with an existing attribute group, follow the steps in section Locating an Existing Attribute Group.

If a new attribute group is needed for the new dynamic attribute, follow the steps in section Creating an Attribute Group.

Once you have located your attribute group, continue on to section Adding a Dynamic Atttribute to An Attribute Group.

Articles in this section

Creating an Attribute Group

Locating an Existing Attribute Group

See also

Before You Begin
The Example Used
Adding a Dynamic Atttribute to An Attribute Group
Optional - Adding an Attribute Group to a Product Type
Assigning Dynamic Attributes to a Product
Optional - Viewing the Product

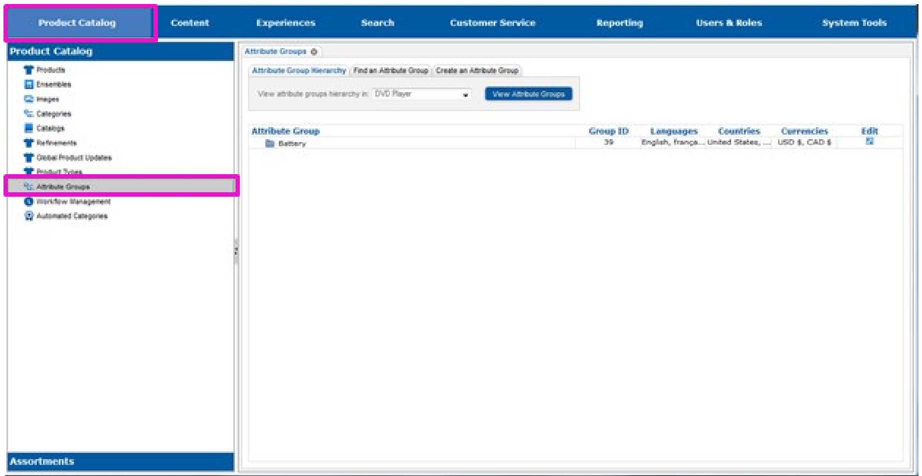
Home > Tutorials > Creating Dynamic Attributes > Determining the Attribute Group > Creating an Attribute Group

Creating an Attribute Group

Attrbute groups are created in the PRODUCT CATALOG portion of the Site Manager.

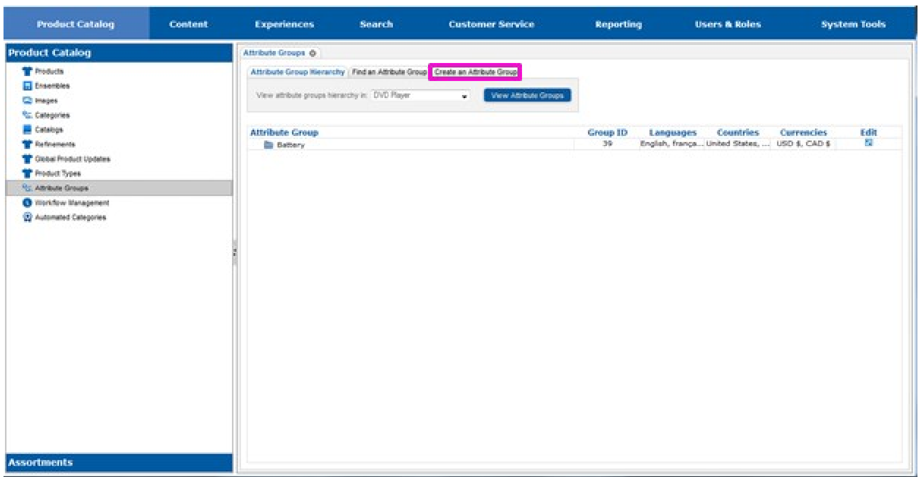
⇒ Select PRODUCT CATALOG.

⇒ Select ATTRIBUTE GROUPS from the left-hand pane.

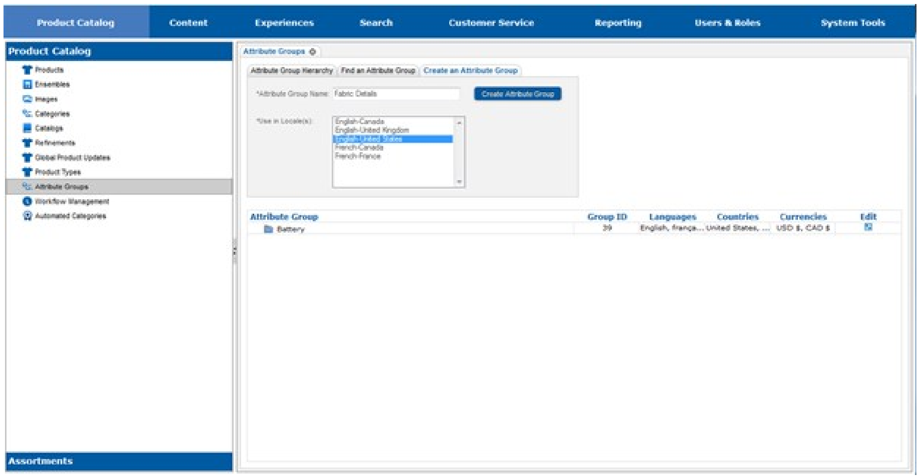


You will have a choice of viewing attribute groups hierachically, finding an attribute group, or creating an attribute group. We will be creating an attribute group.

⇒ Select the CREATE AN ATTRIBUTE GROUP tab.



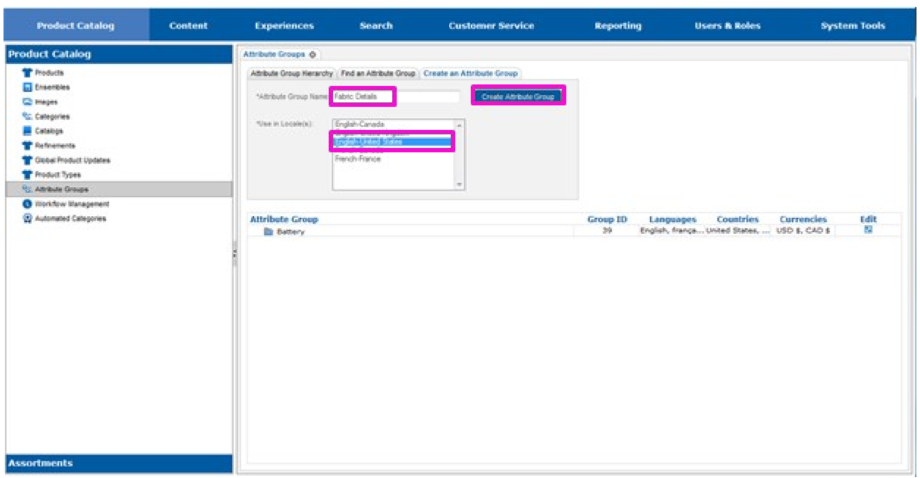
The page will refresh and you will see fields for entering an attribute group name.



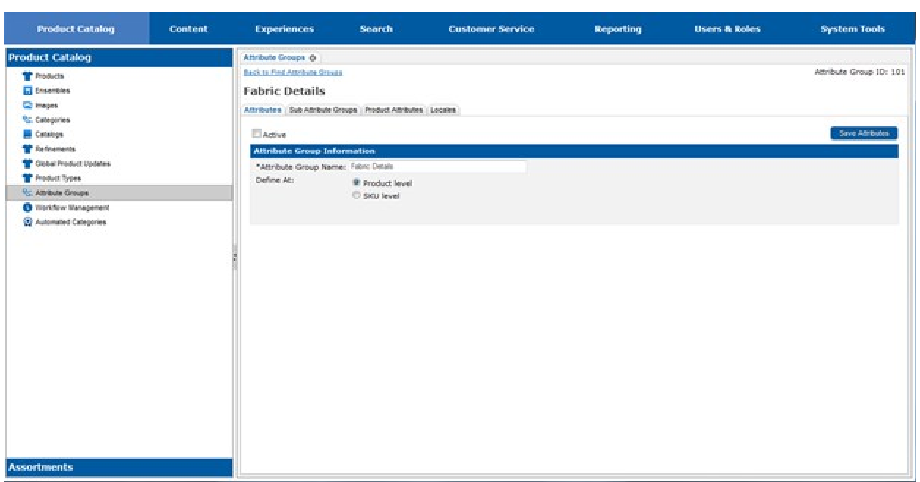
⇒ In the text entry field, enter the name of the new attribute group.

⇒ Select the CREATE ATTRIBUTE GROUP button.

⇒ Select the locale(s) from the USE IN LOCALE(S) list that the attribute group will be available for (international sites only).



The page will refresh and you will see multiple tabs for the new attribute group.

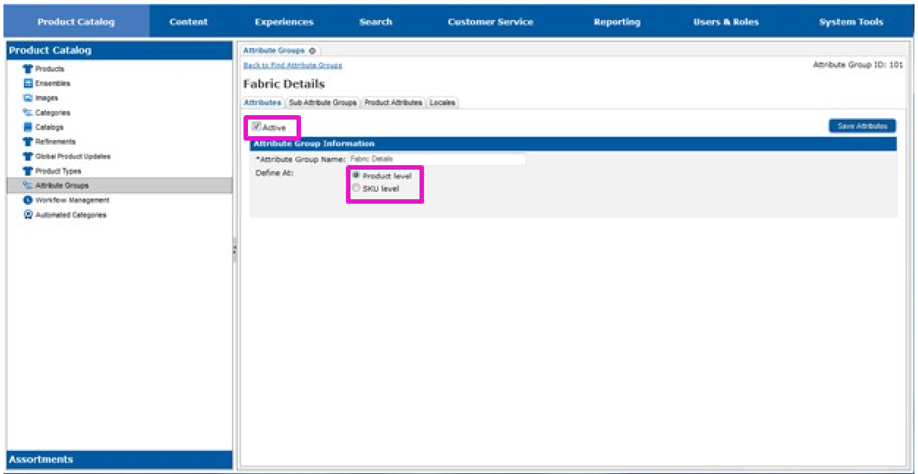


The new attribute group has been created, but it is inactive, meaning it cannot be used. It must be activated in order to use it.

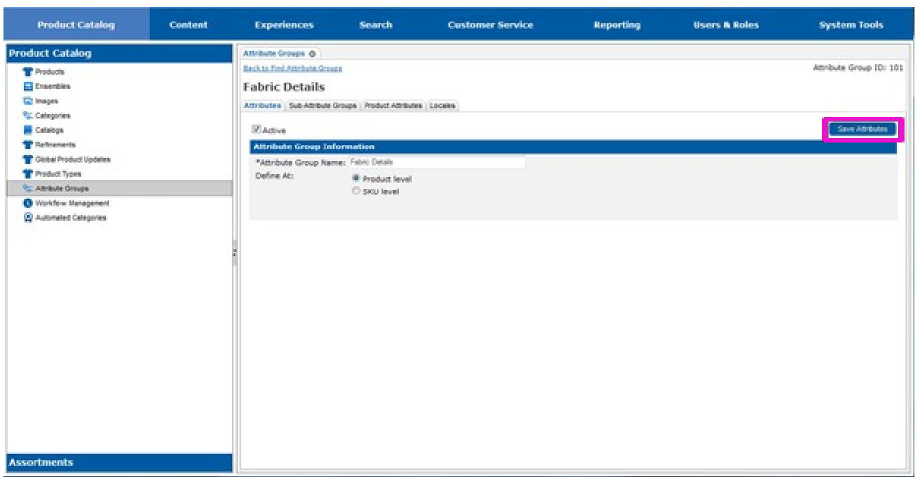
⇒ Select the ACTIVE checkbox.

The DEFINE AT fields specify the level at which this attribute will be available. Select the level that corresponds to your attribute. For this example, we are creating product level attributes.

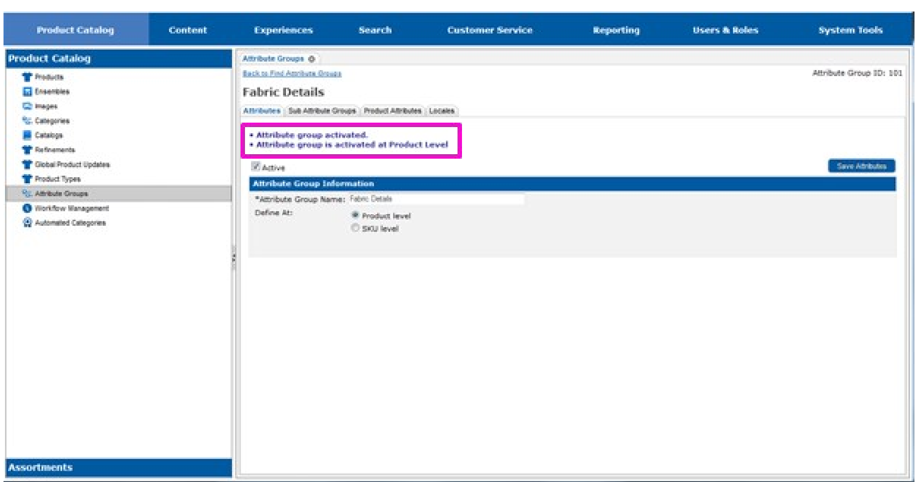
⇒ Select the PRODUCT LEVEL radio button.



⇒ Select the SAVE ATTRIBUTES button.



The page will refresh and you will see a message indicating the attribute group has been activated.



⇒ Continue on to section Adding a Dynamic Atttribute to An Attribute Group to add your new attribute to this attribute group.

See also

Locating an Existing Attribute Group

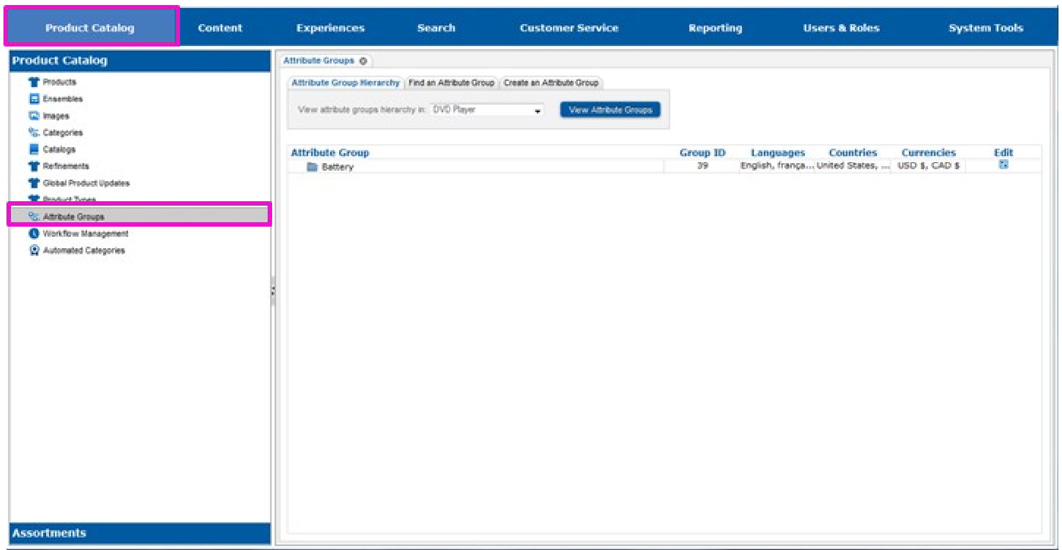
Home > Tutorials > Creating Dynamic Attributes > Determining the Attribute Group > Locating an Existing Attribute Group

Locating an Existing Attribute Group

Attrbute groups are managed in the PRODUCT CATALOG portion of the Site Manager.

⇒ Select PRODUCT CATALOG.

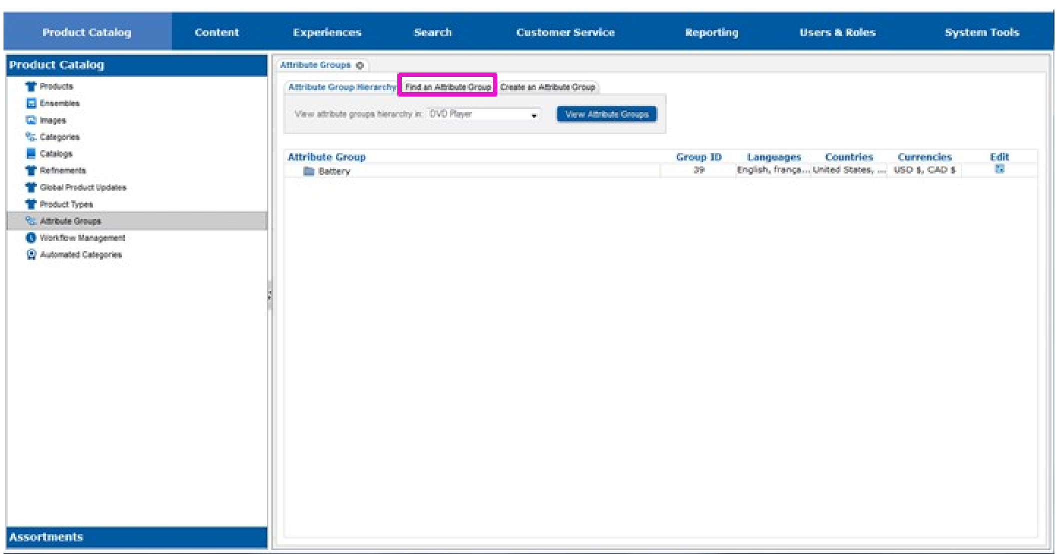
⇒ Select ATTRIBUTE GROUPS from the left-hand pane.



You will have a choice of viewing attribute groups hierachically, finding an attribute group, or creating an attribute group. We will be finding an attribute group.

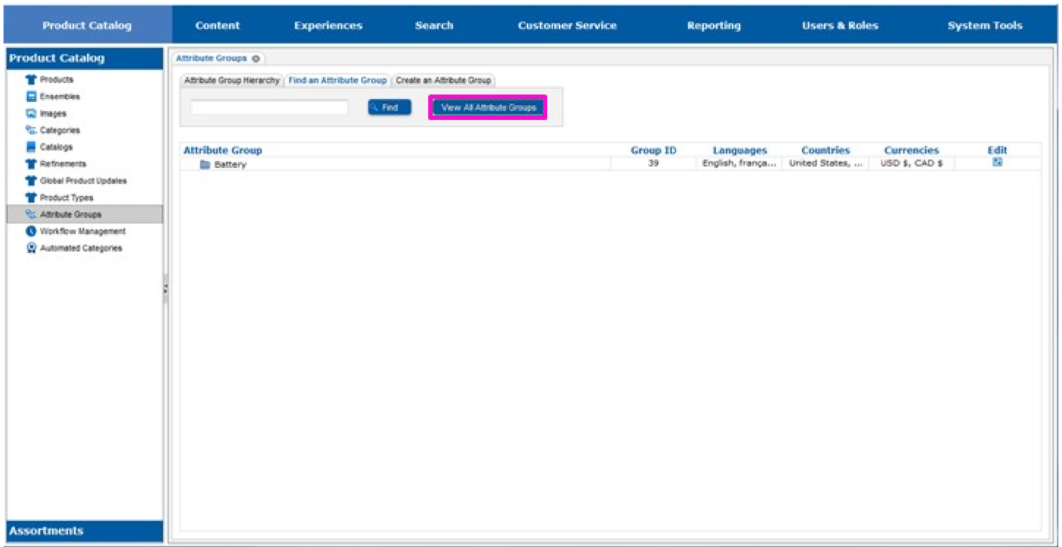
⇒ Select the FIND A ATTRIBUTE GROUP tab.

The page will refresh and you will see fields for finding an attribute group.

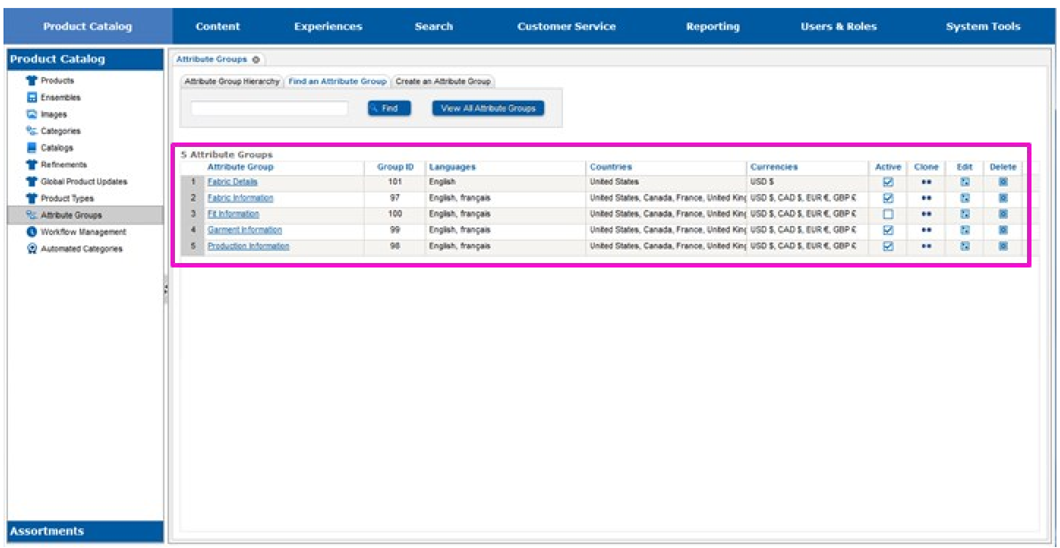


You can locate an attribute group by searching for it by name or by viewing all of the attribute groups. For this tutorial, we will view all the attribute groups.

⇒ Select VIEW ALL ATTRIBUTE GROUPS.

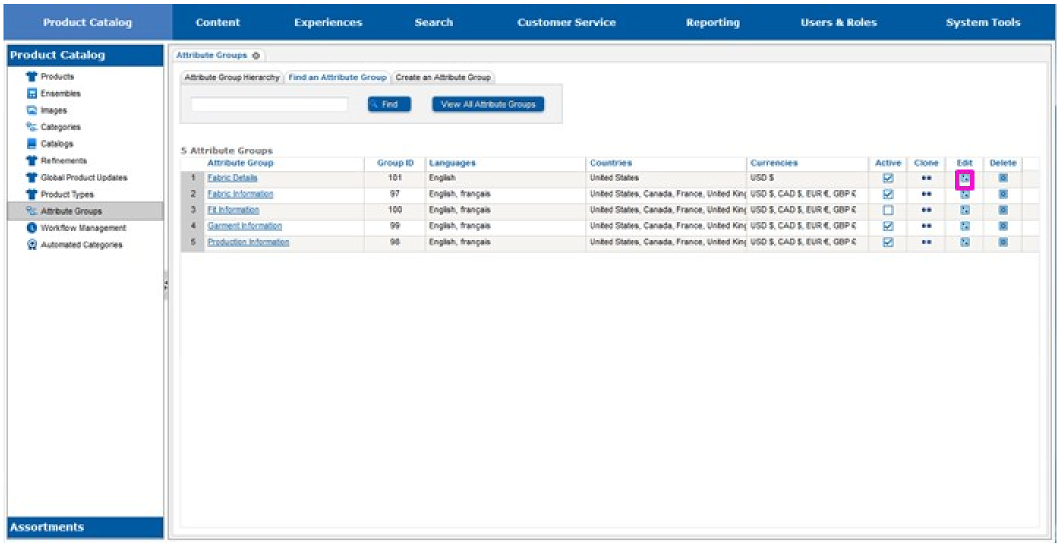


The screen will refresh and you will see a list of all of the attribute groups displayed in the middle of the tab.



⇒ Locate the attribute group you wish to add the new attribute to.

⇒ Select the EDIT icon to the right of the attribute group in the list.



The page will refresh and you will see tabs for ATTRIBUTES, SUB ATTRIBUTE GROUPS, AND PRODUCT ATTRIBUTES.

⇒ Continue on to section ***Adding a Dynamic Atttribute to An Attribute Group*** to add your new attribute to this attribute group.

See also

Creating an Attribute Group

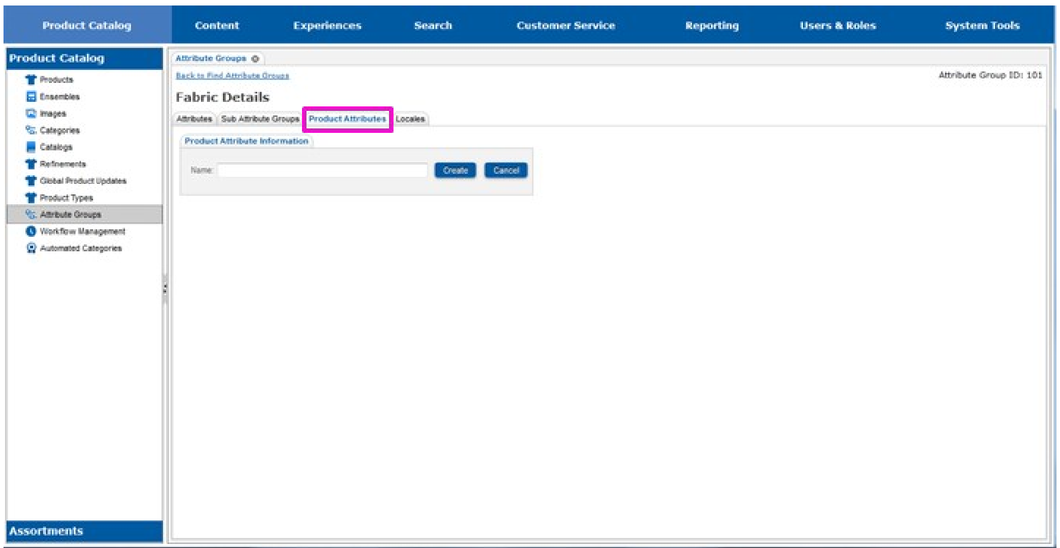
Home > Tutorials > Creating Dynamic Attributes > Adding a Dynamic Atttribute to An Attribute Group

Adding a Dynamic Atttribute to An Attribute Group

Dynamic attributes are added through the PRODUCT ATTRIBUTES tab of an attribute group. For this step you should have an attribute group open in Site Manager, with tabs for ATTRIBUTES, SUB ATTRIBUTE GROUPS, and PRODUCT ATTRIBUTES showing. If you do not, return to step ***Determining the Attribute Group***.

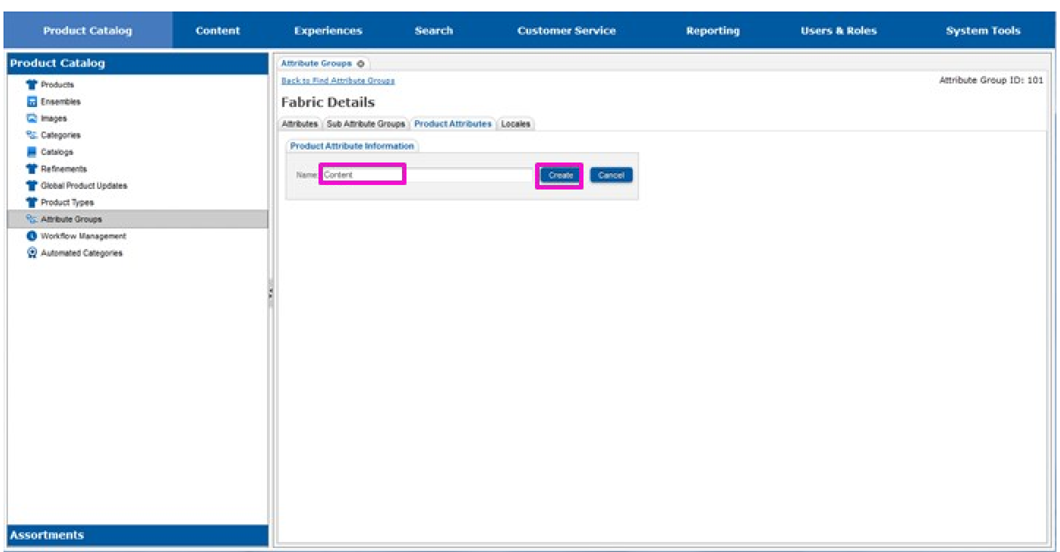
⇒ Select PRODUCT ATTRIBUTES.

The page will redraw and you will see fields to create new product attributes. You may also see a list of existing product attributes if your attribute group already contains some.

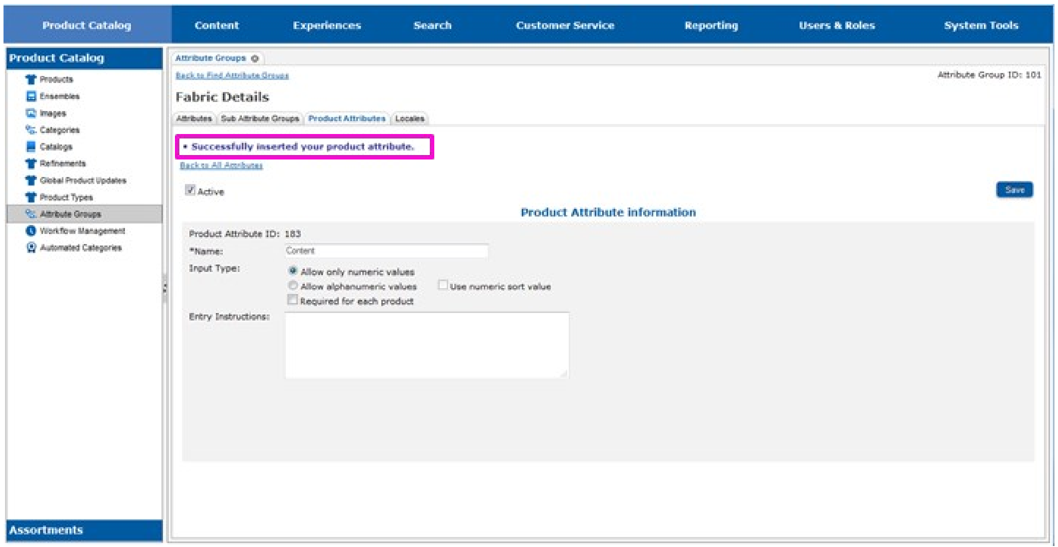


⇒ Enter the name of the new product attribute in the NAME text field.

⇒ Select the CREATE button.



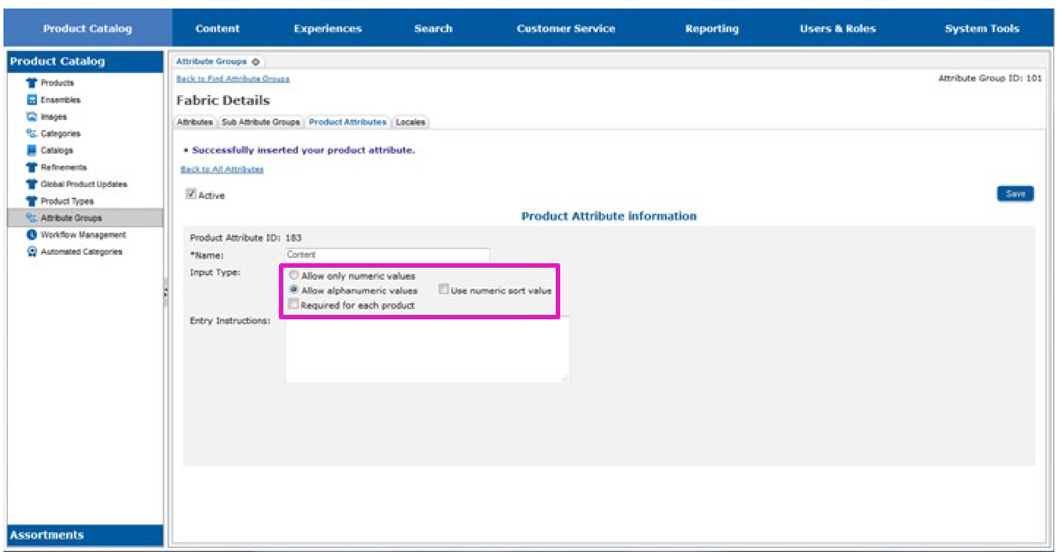
The page will refresh and you will see a message that your product attribute was created, along with additional fields to fill in for the attribute.



The INPUT TYPE fields define the type of data that can be entered as values for this attribute. Select the field that corresponds to the type of data that your attribute allows for values. For this example, we are allowing alphunumeric data for the value.

⇨ Select the ALPHANUMERIC radio button.

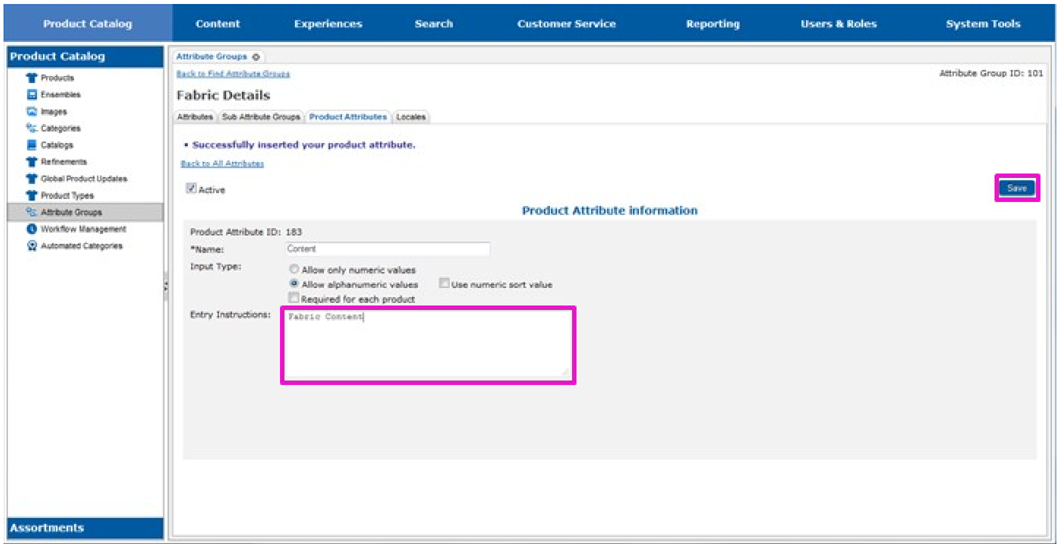
⇨ Select the REQUIRED FOR EACH PRODUCT checkbox if values for this attribute are always required.



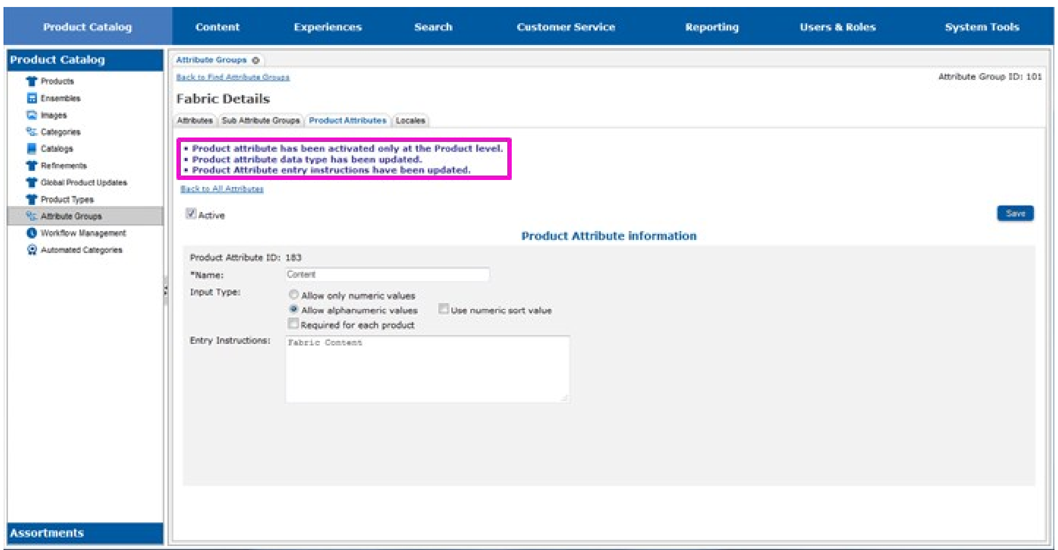
The ENTER INSTRUCTIONS field contains text that will be displayed with the attribute when values are assigned to it. The field should contain text that will assist the users that are assigning the values for this attribute.

⇨ Enter instructions in the ENTER INSTRUCTIONS field that will assist the users assigning values to the attribute.

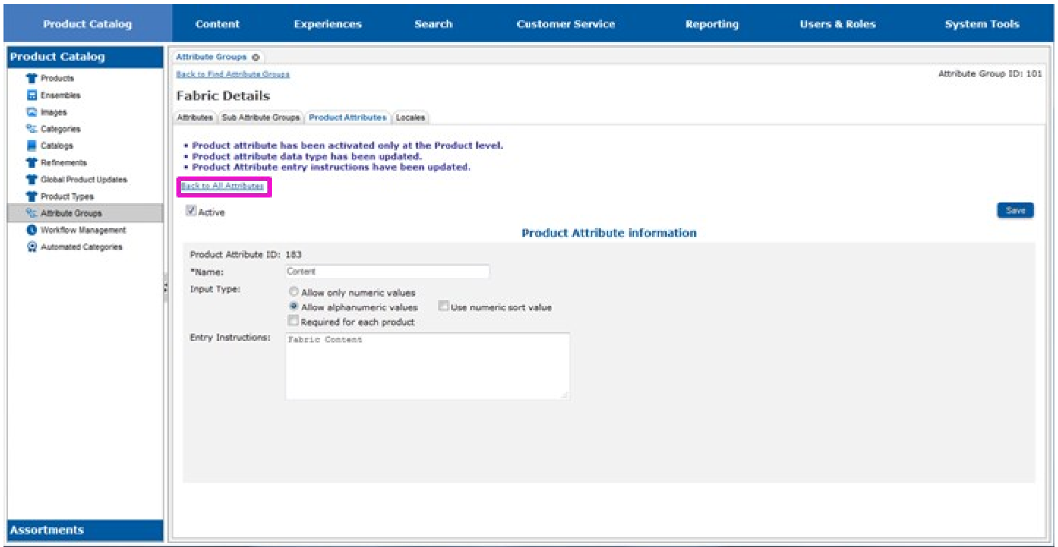
⇨ Select the SAVE button.



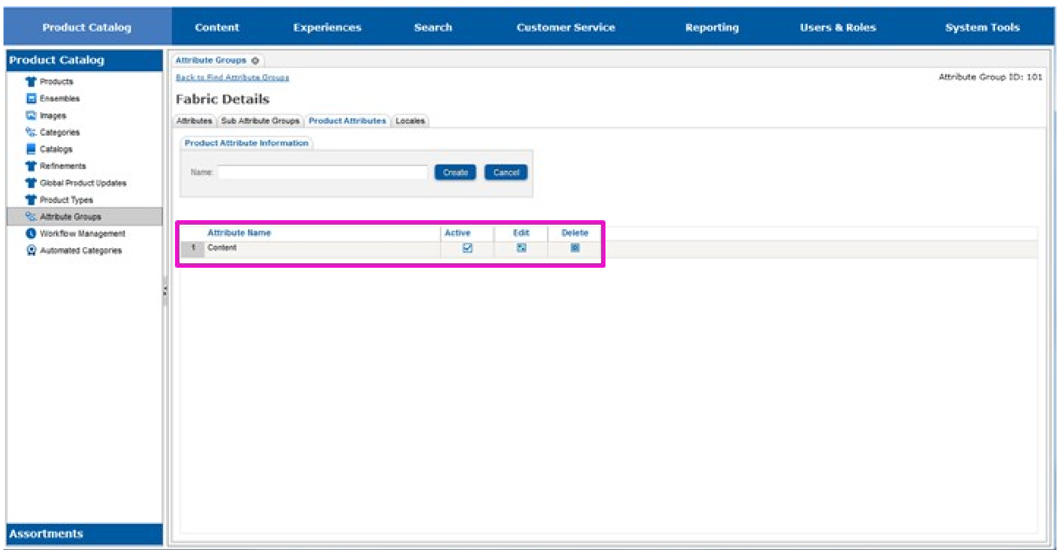
The screen will redraw and you will see messages indicating your modifications have been saved.



⇨ Select the BACK TO ALL ATTRIBUTES breadcrumb to return to the page showing all the attributes defined for the attribute group.



The page will redraw and you will see the initial PRODUCT ATTRIBUTES tab. The new attribute you created will be shown in the list in the middle of the tab.



⇨ Repeat the steps in this section as needed to add additional attributes to the group.

When you have completed adding all your attributes, follow one of the two steps below:

⇨ If this attribute group needs to be associated with a product type, continue on to section ***Optional - Adding an Attribute Group to a Product Type***.

or

⇨ If the attribute group is already associated with a product type, continue on to section ***Assigning Dynamic Attributes to a Product*** to use the new attribute.

See also

Before You Begin
The Example Used
Determining the Attribute Group
Optional - Adding an Attribute Group to a Product Type
Assigning Dynamic Attributes to a Product
Optional - Viewing the Product

Optional - Adding an Attribute Group to a Product Type

An attribute group needs to be associated with a product type before it will be available to products.

If the attribute group you are working with is already associated with a product type, this step is not needed. Continue on to section ***Assigning Dynamic Attributes to a Product*.**

If the attribute group you are working with is not currently assigned to a product type, continue on to section ***Determining the Product Type*.**

Articles in this section

Determining the Product Type

Adding the Attribute Group to the Product Type

See also

Before You Begin
The Example Used
Determining the Attribute Group
Adding a Dynamic Atttribute to An Attribute Group
Assigning Dynamic Attributes to a Product
Optional - Viewing the Product

Home > Tutorials > Creating Dynamic Attributes > Optional - Adding an Attribute Group to a Product Type > Determining the Product Type

Determining the Product Type

When associating an attribute group to a product type, you can use an existing product type or create a new product type.

If you want to create a new product type, follow the instructions in section Creating a Product Type.

If you want to use an existing product type, follow the instructions in section Locating an Existing Product Type.

Once you have completed the steps in either of those sections, continue on to section Adding the Attribute Group to the Product Type.

Articles in this section

See also

Adding the Attribute Group to the Product Type

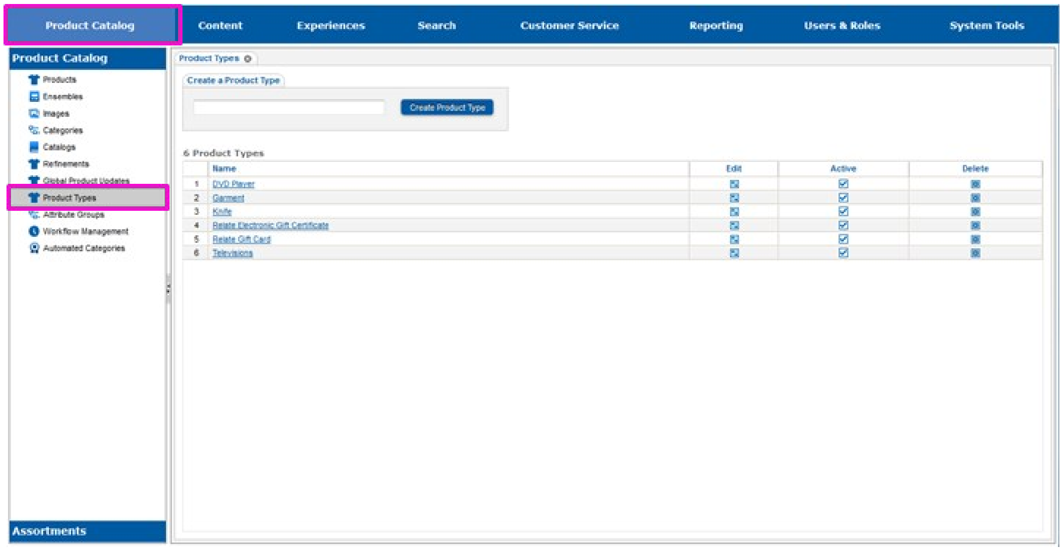
Home > Tutorials > Creating Dynamic Attributes > Optional - Adding an Attribute Group to a Product Type > Determining the Product Type > Creating a Product Type

Creating a Product Type

Product types are created in the PRODUCT CATALOG portion of the Site Manager.

⇒ Select PRODUCT CATALOG.

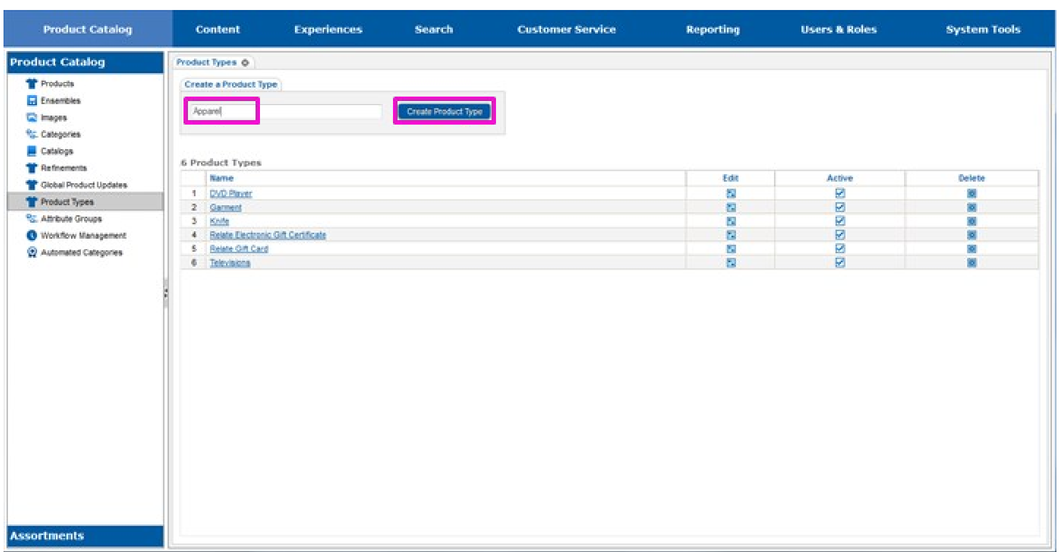
⇒ Select PRODUCT TYPES from the left-hand navigation pane.



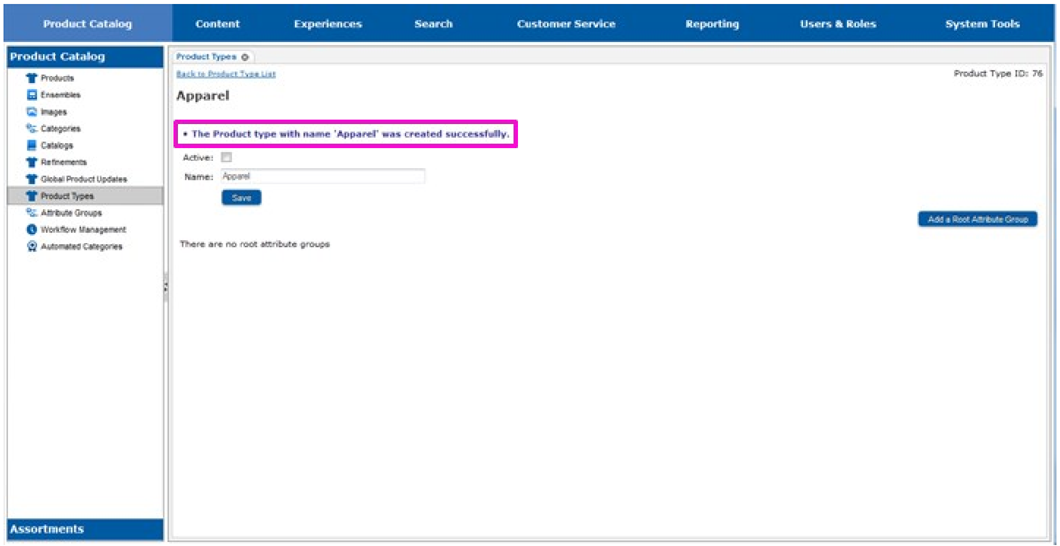
The screen will show a tab for creating new product types, along with a list of all of the existing product types.

⇒ In the CREATE A PRODUCT TYPE tab, enter the name of your new product type in the text field.

⇒ Select the CREATE PRODUCT TYPE button.



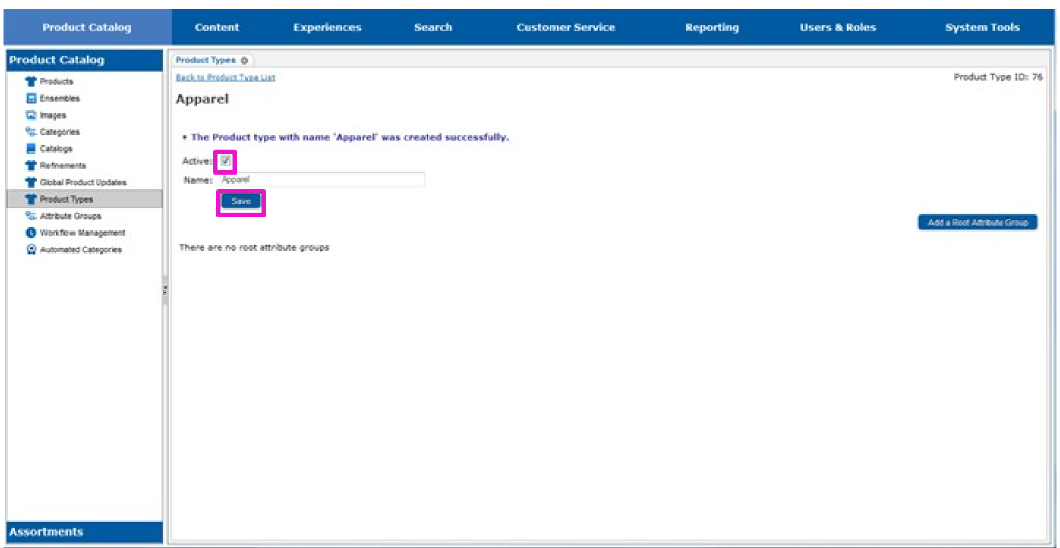
The page will redraw and you will see a screen with detailed fields for the product type, along with a message indicating your new product type has been created.



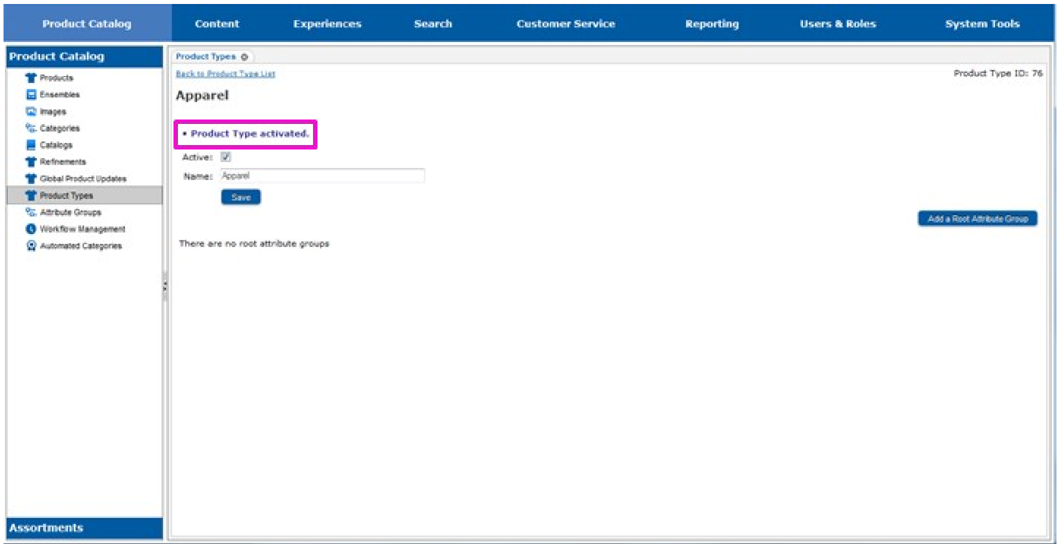
Product types are created in an inactive state. In order to have the product type available for selection when editing a product, the product type must be activated.

⇒ Select the ACTIVE checkbox.

⇒ Select the SAVE button.



The screen will redraw and you will see a message indicating your product type has been activated.



You can now associate an attribute group with the new product type.

⇒ Continue on to the steps in section Adding the Attribute Group to the Product Type.

See also

Locating an Existing Product Type

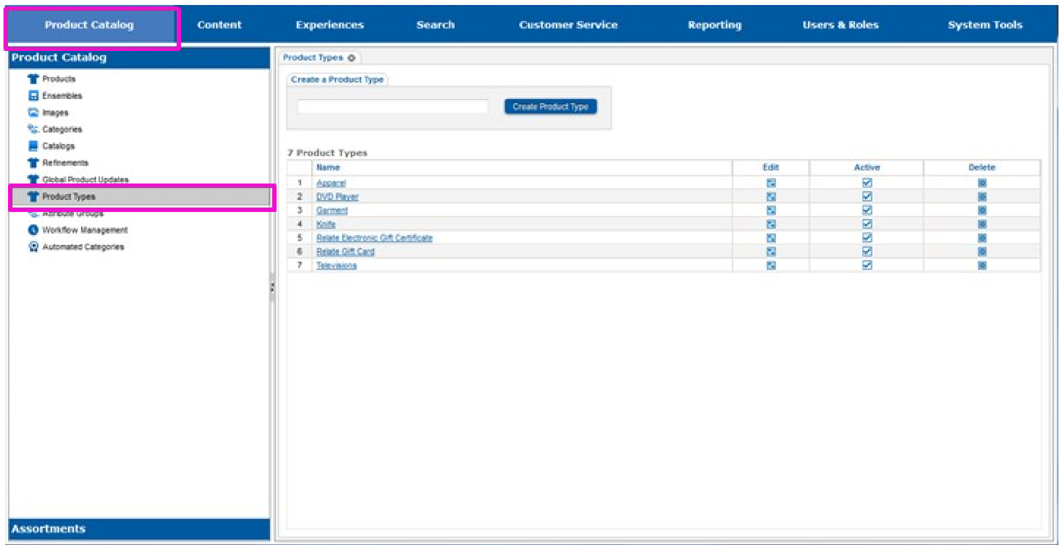
Home > Tutorials > Creating Dynamic Attributes > Optional - Adding an Attribute Group to a Product Type > Determining the Product Type > Locating an Existing Product Type

Locating an Existing Product Type

Product types are located in the PRODUCT CATALOG portion of the Site Manager.

⇒ Select PRODUCT CATALOG.

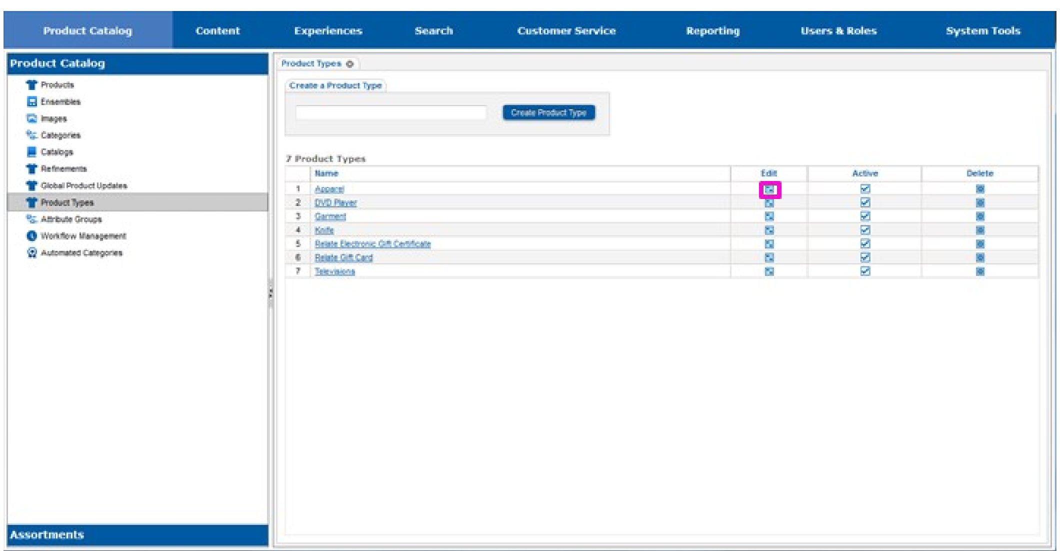
⇒ Select PRODUCT TYPES from the left-hand pane.



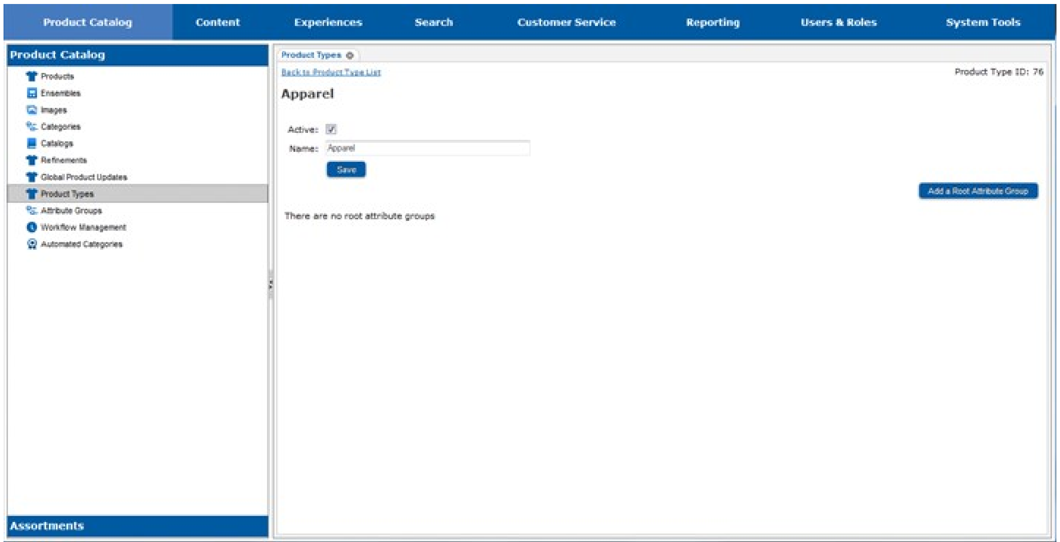
You will see a list of all of the product types that are currently defined for the site.

⇒ Locate the product type you wish to associated the attribute group with.

⇒ Select the EDIT icon to the right of the product type.



The page will refresh and you will see the details of the product type you selected.



You can now associate an attribute group with the selected product type.

⇒ Continue on to the steps in section ***Adding the Attribute Group to the Product Type***.

See also

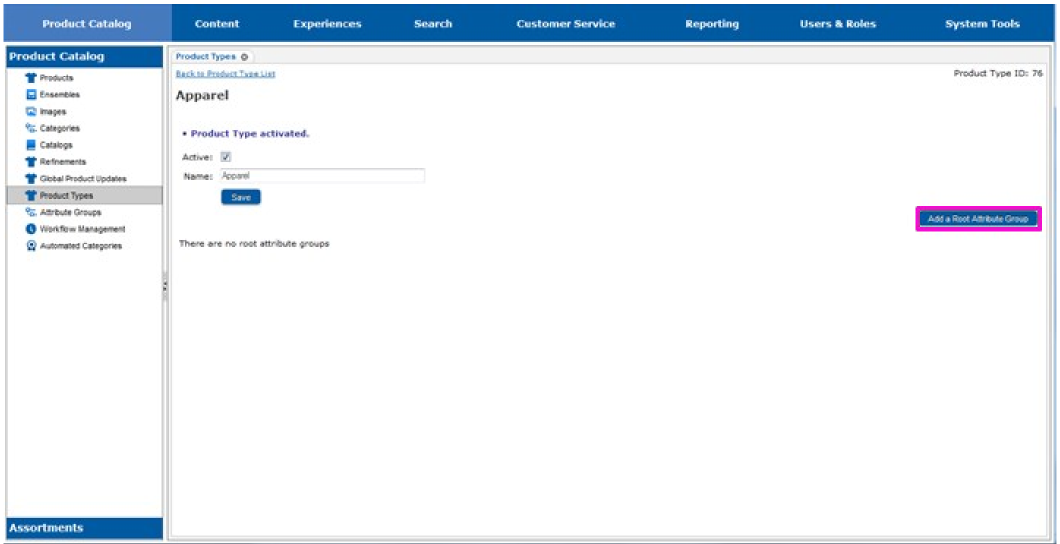
Creating a Product Type

Home > Tutorials > Creating Dynamic Attributes > Optional - Adding an Attribute Group to a Product Type > Adding the Attribute Group to the Product Type

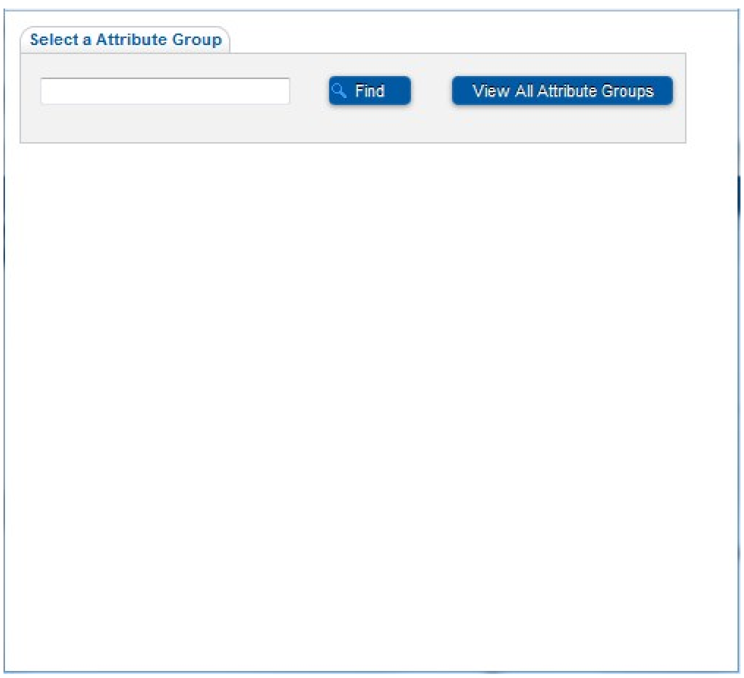
Adding the Attribute Group to the Product Type

Attribute groups are associated with product types through the product type detail page in the Site Manager. For this step you should have the detail page of a product type open. If you do not, return to section ***Determining the Product Type***.

⇨ Select the ADD A ROOT ATTRIBUTE GROUP button.

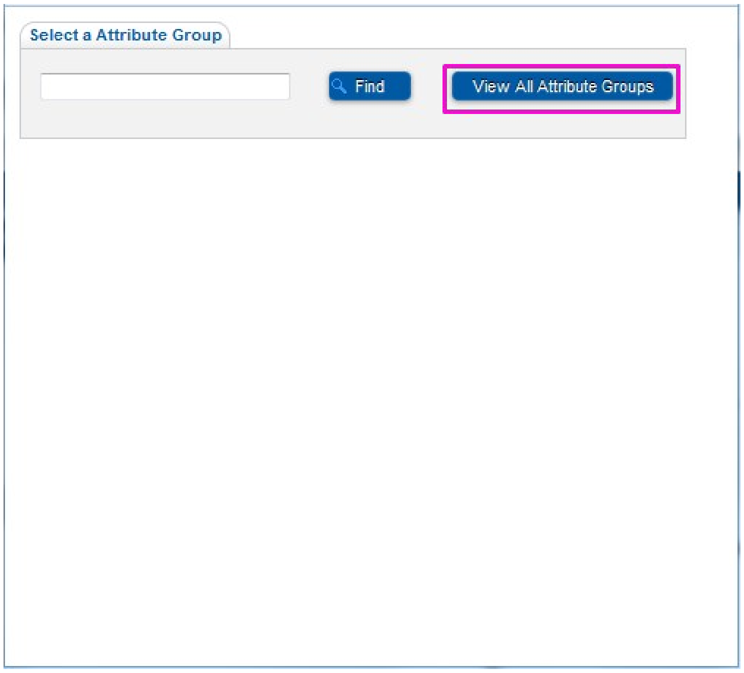


A pop-up dialog box will appear that will allow you to locate the attribute group you want to add to the product type.

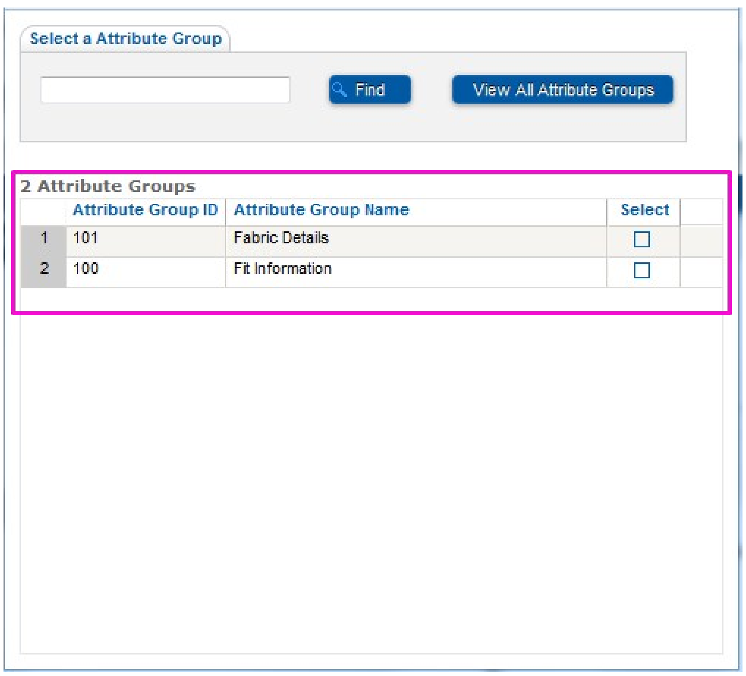


You can search for an attribute either by name or you can view all the attribute groups for the site. For this tutorial, we will be viewing all of the attribute groups.

⇨ Select the VIEW ALL ATTRIBUTE GROUPS button.

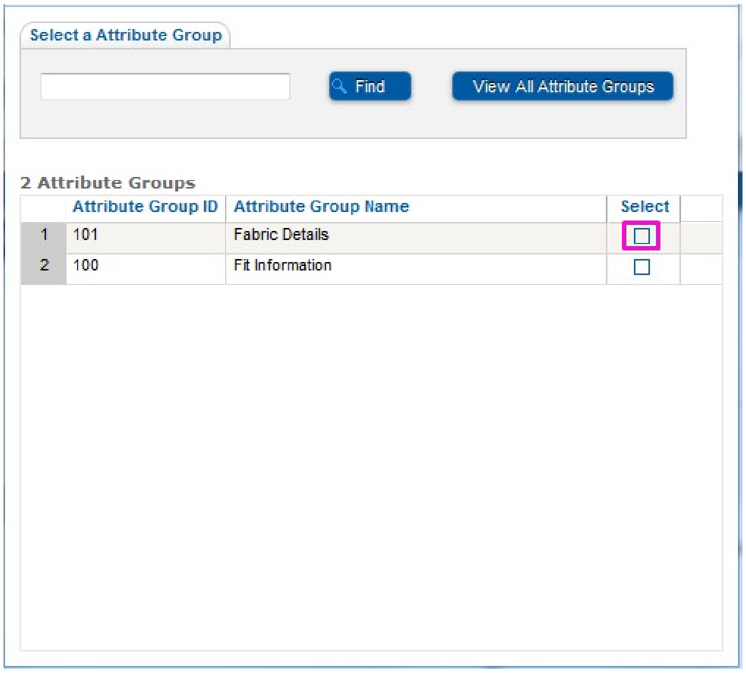


A list of all of the attribute groups will appear in the middle of the dialog box.

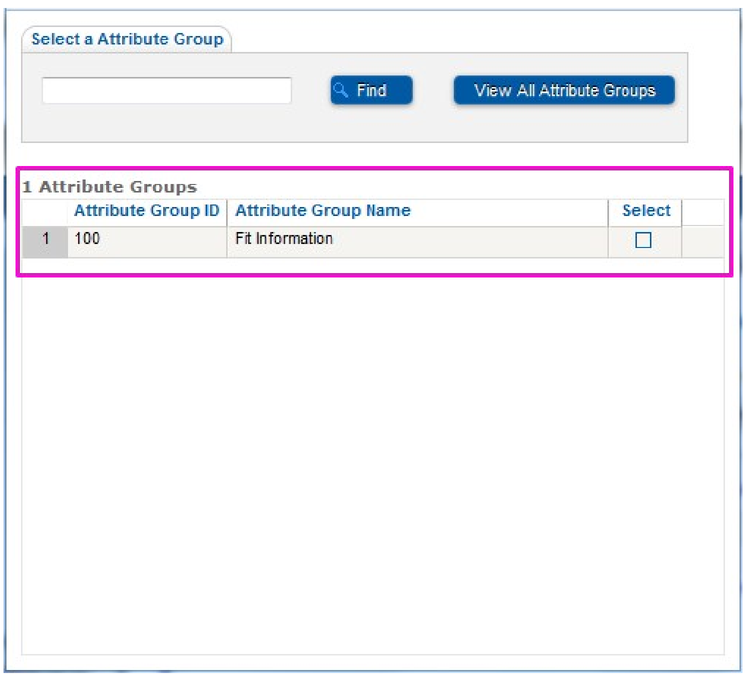


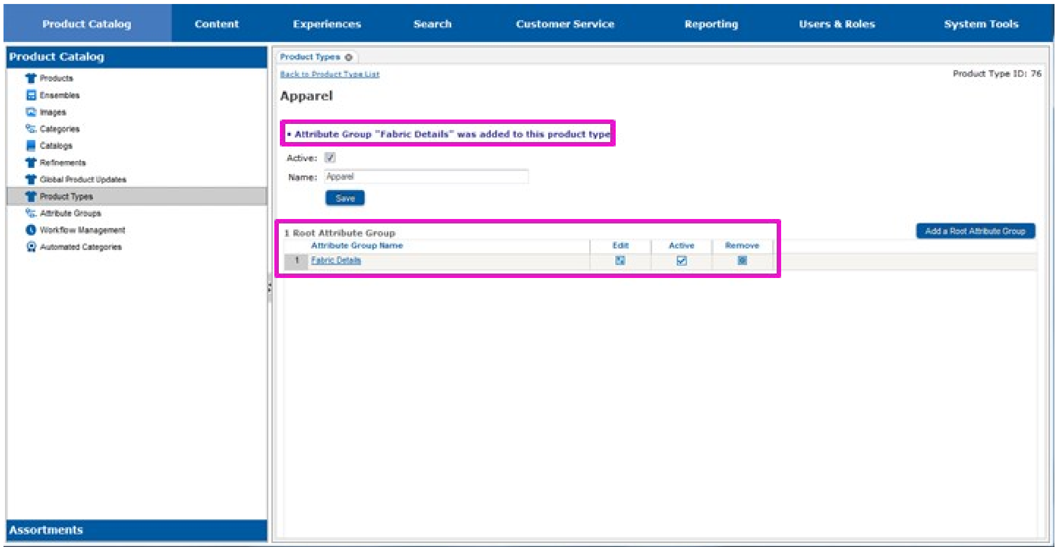
⇒ Locate the attribute group you want to add to the product type.

⇒ Select the SELECT checkbox to the right of the attribute group.



The dialog box will refresh and the attribute group you selected will be removed from the list. It will be added to the list of attribute groups on the product type detail page.





You can now use the new attribute group with a product.

⇒ Continue on to section ***Assigning Dynamic Attributes to a Product***.

See also

Determining the Product Type

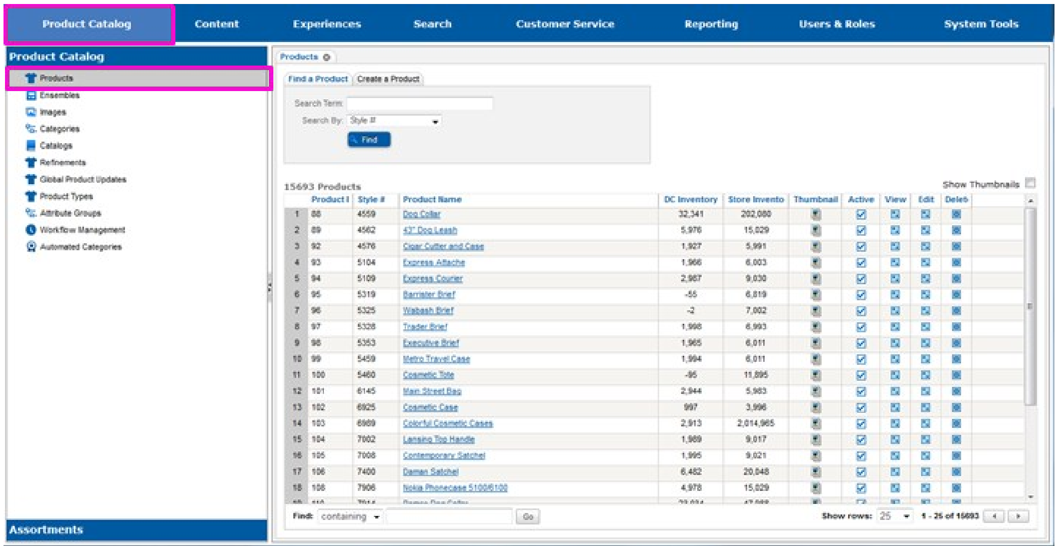
Home > Tutorials > Creating Dynamic Attributes > Assigning Dynamic Attributes to a Product

Assigning Dynamic Attributes to a Product

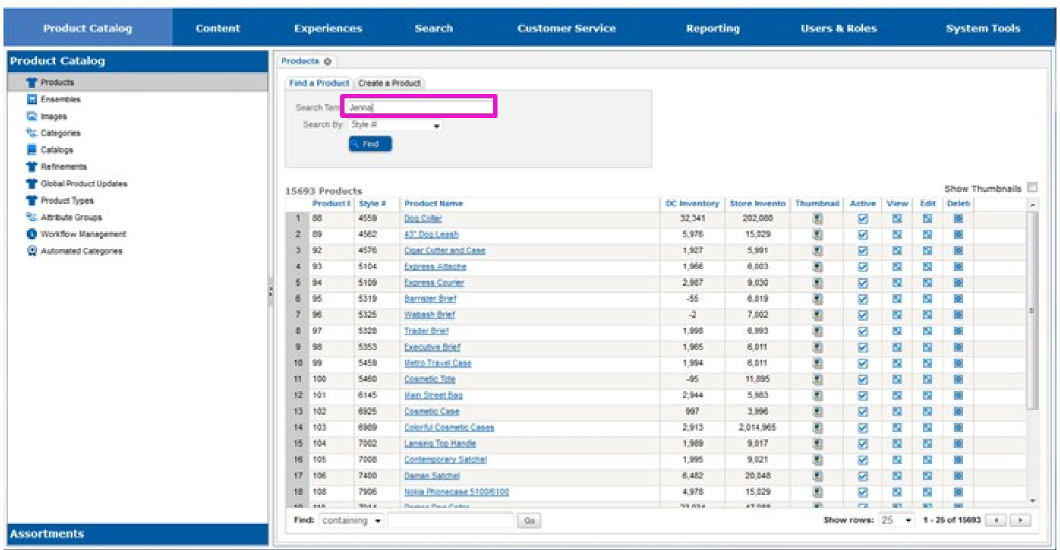
Dynamic attributes are assigned to products through the PRODUCT CATALOG portion of the Site Manager.

⇒ Select PRODUCT CATALOG.

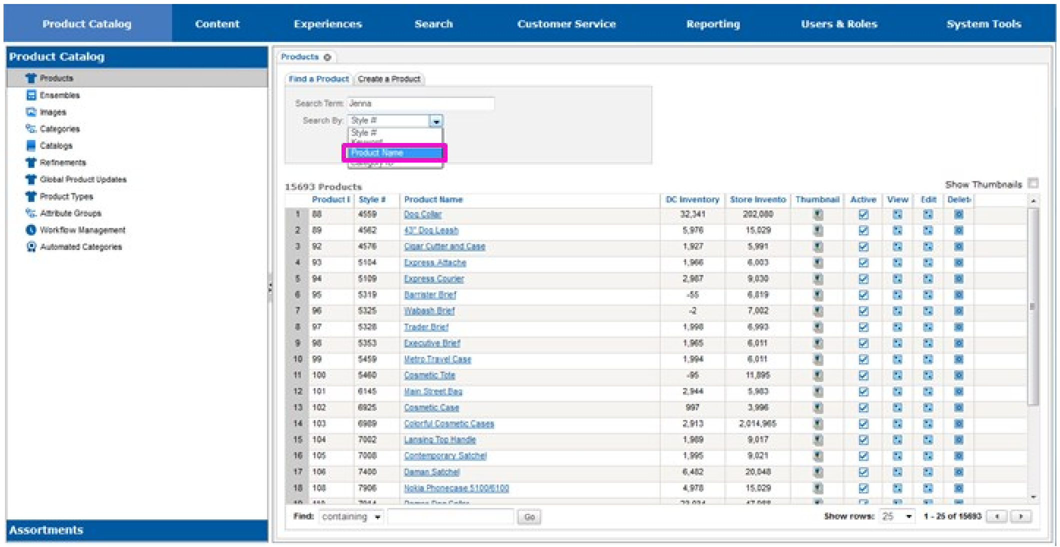
⇒ Select PRODUCTS from the left-hand pane.



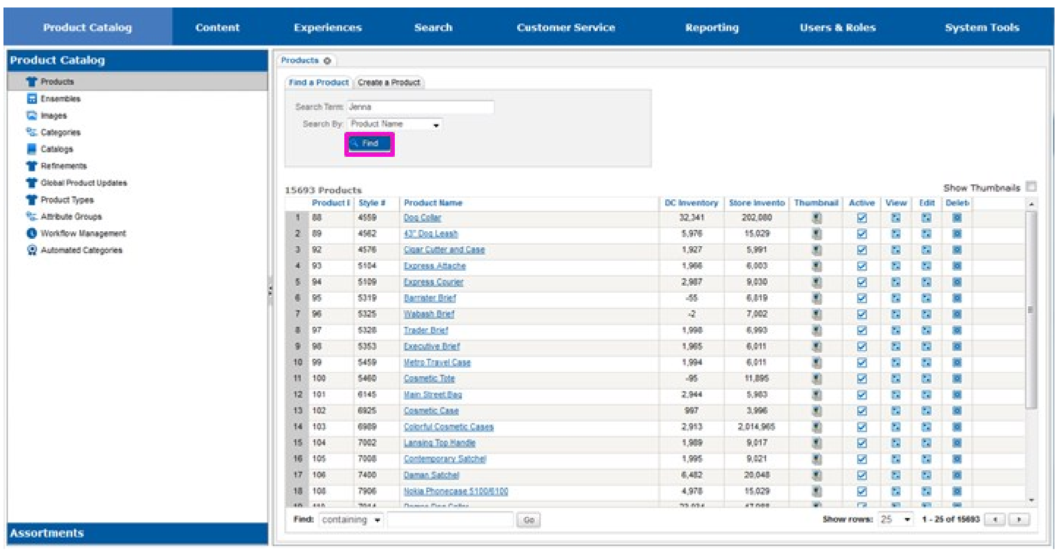
⇒ Enter a search term for the product you are looking for in the SEARCH TERM entry field.



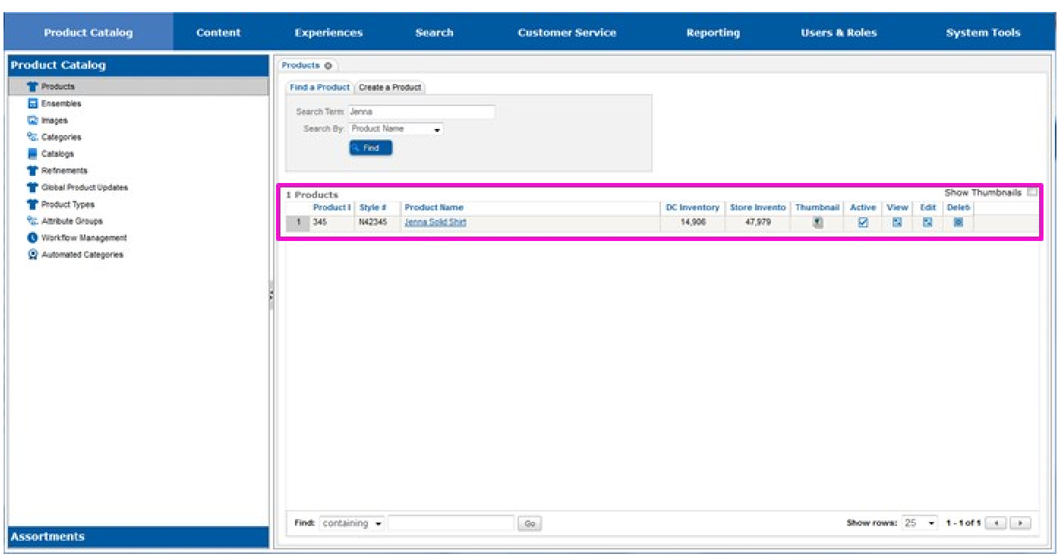
⇒ Use the SEARCH BY drop-down list box to select the type of search to perform.



⇨ Select the FIND button.

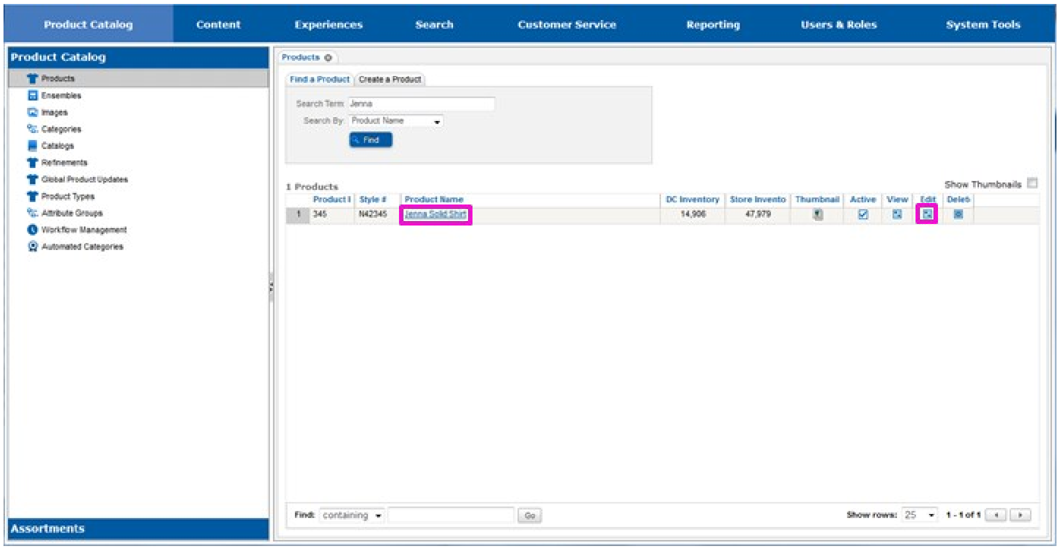


The screen will refresh and you will see a list of all of the products that matched your search term.



⇒ Locate the product you are going to use dynamic attributes with in the search results list.

⇒ Select either the name of the product or the EDIT icon to the right of the product.



The screen will refresh and you will see multiple sub-tabs on the page.

⇒ Continue on to section ***Optional - Assigning Dynamic Attributes*** to set values for the product. This section is part of the ***Creating New Products*** tutorial, but the steps are the same for existing products.

See also

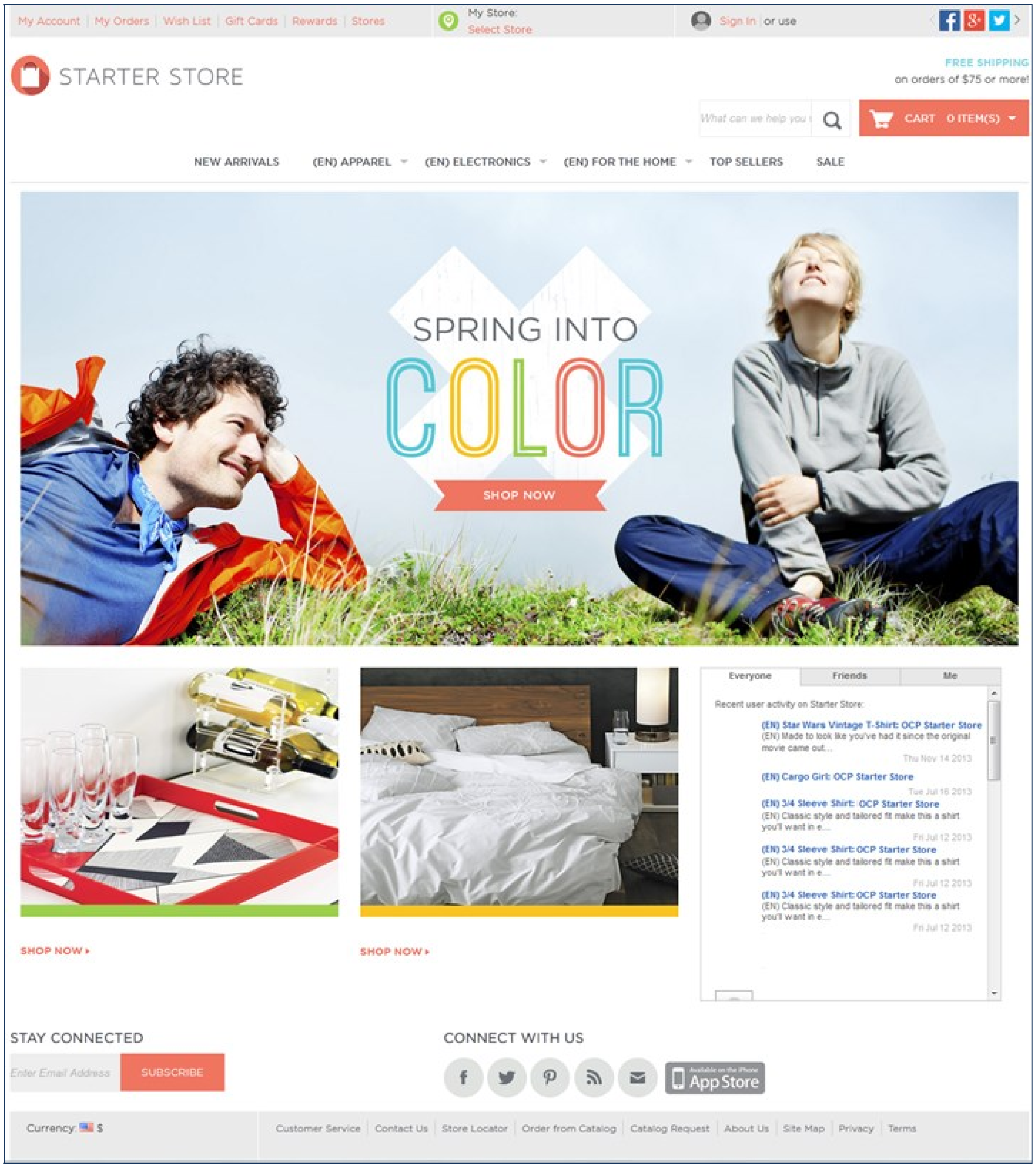
Before You Begin
The Example Used
Determining the Attribute Group
Adding a Dynamic Atttribute to An Attribute Group
Optional - Adding an Attribute Group to a Product Type
Optional - Viewing the Product

Home > Tutorials > Creating Dynamic Attributes > Optional - Viewing the Product

Optional - Viewing the Product

To view the attributes that have been added to the product, you need to visit the product's page on the web site.

⇒ Access the home page of your web site.

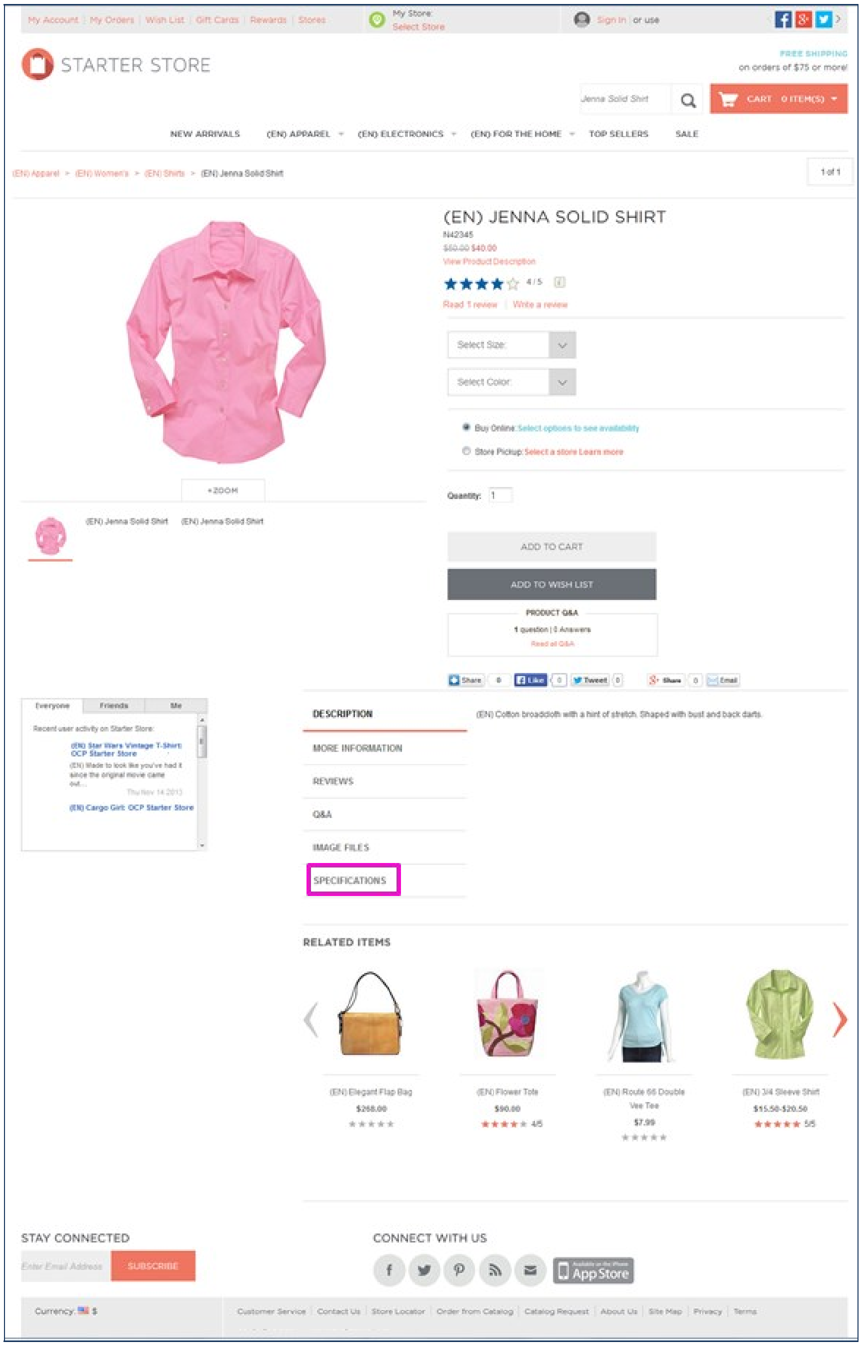


⇒ Enter the name of the product in the SEARCH text field.

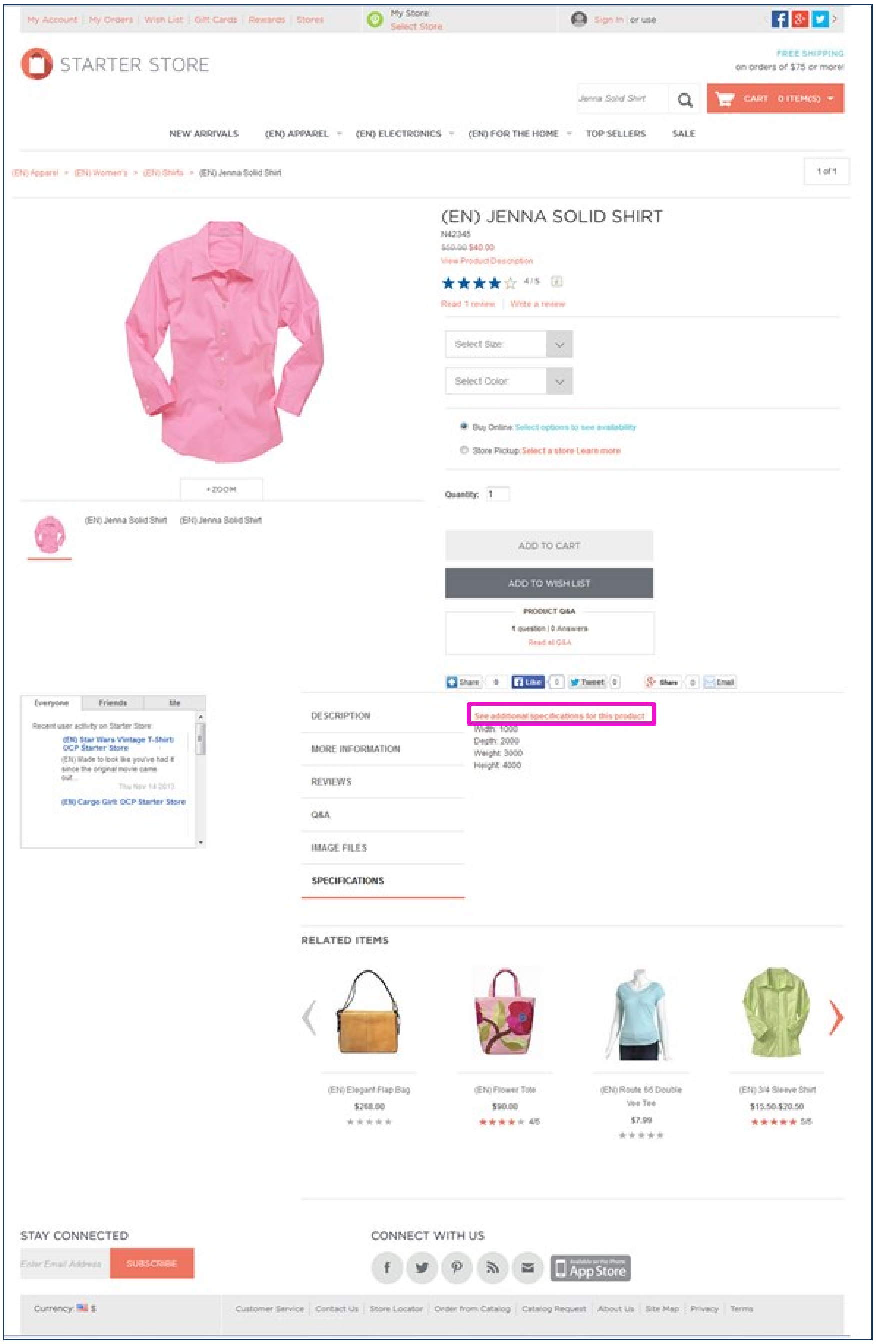
⇒ Select the SEARCH button.

The page will redraw and you will see the page for the product.

⇒ Select the SPECIFICATIONS tab near the bottom of the page.



The page will redraw and you will see the attribute values you entered.



See also

Before You Begin
The Example Used
Determining the Attribute Group
Adding a Dynamic Atttribute to An Attribute Group
Optional - Adding an Attribute Group to a Product Type
Assigning Dynamic Attributes to a Product

Creating New Products

This tutorial describes how to add a new product to the website. There is a variety of information that can be included with the product and different products will require different information. This document describes adding each type of information that is possible, but your product may not need all the types. However, products with a richer set of information are more likely to answer all the questions potential buyers may have, and therefore are more likely to be purchased.

Follow the instructions in the different sections of this document based on what information you need to add with your product. It is not necessary to follow the steps in the order they are listed.

Conventions Used in this Tutorial

SMALL CAPS: Items that appear in small caps refer to text items on the application. If you are viewing the application, you should see a label, menu, or button with the same text on it.

⇒: Arrows appear at the beginning of areas that contain a task you should perform. When you see the arrow, you should perform the described task.

: Pink outline boxes are used to highlight areas of screenshots that are being referred to in the text. These are used to call attention to a particular area of the screen, but you will not see those boxes on your screen when you are using the application.

Articles in this section

- Before You Begin
- The Example Used
- Create a New Product
- Setting the Workflow Status
- Assigning Attributes
- Assigning Images and Alternate Text
- Assigning Search Engine Data and Search Keywords
- Assigning Cross Sells and Up Sells
- Assigning Variants
- Assigning Files
- Optional - Assigning the Product to a
- Optional - Customizing for Locales
- Optional - Previewing the Product

See also

Adding Products To Categories
Adding Synonyms to the Thesaurus
Creating an Experience for a Promotion
Creating an Experience for an A/B Test
Creating Dynamic Attributes
Modifying Content
Working With Stores

Home > Tutorials > Creating New Products > Before You Begin

Before You Begin

Products are manually added to a website using the Site Manager. Before you begin adding a product, you should:

- Have a valid Site Manager log in and know how to access the Site Manager;
- Know how to navigate the Site Manager and find various sections in it;
- Be logged in to the Site Manager;
- Know the product(s) you are adding;
- Know the details of the product, such as price and description;
- Know the image(s) that will be used for the product;
- Know the terms to be used for searches on the website and for external search engines;
- Know which items should be related to the product for cross sells and up sells;
- Know if there are any supporting files that should be associated with the product;
- Know if there are any dynamic attributes for the product.

See also

The Example Used
Create a New Product
Setting the Workflow Status
Assigning Attributes
Assigning Images and Alternate Text
Assigning Search Engine Data and Search Keywords
Assigning Cross Sells and Up Sells
Assigning Variants
Assigning Files
Optional - Assigning the Product to a Category
Optional - Customizing for Locales
Optional - Previewing the Product

The Example Used

For this document, we will be adding a clothing item. The product is available immediately, which allows it to be viewed on the website as soon as it has been entered. The product does not contain values for all of the pieces of information available for products, so you may fill in different information for your product.

See also

Before You Begin
Create a New Product
Setting the Workflow Status
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Assigning Images and Alternate Text
Assigning Search Engine Data and Search Keywords
Assigning Cross Sells and Up Sells
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Optional - Customizing for Locales
Optional - Previewing the Product

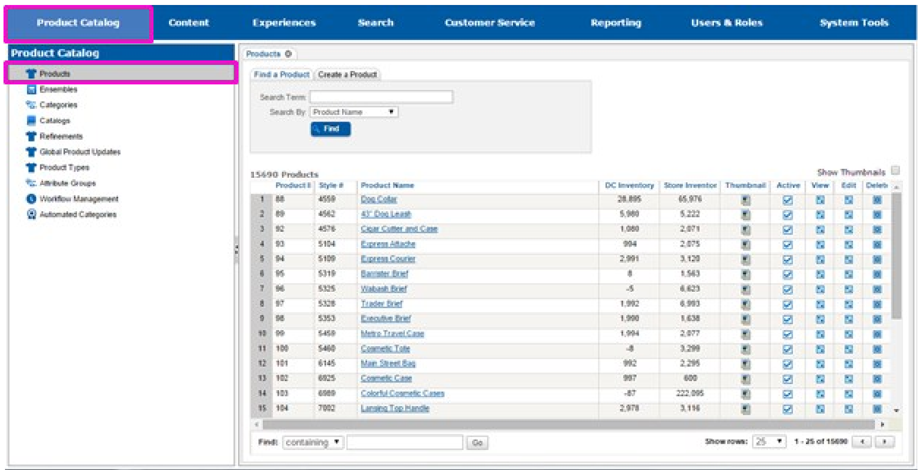
Home > Tutorials > Creating New Products > Create a New Product

Create a New Product

Products are created in the PRODUCT CATALOG portion of the Site Manager.

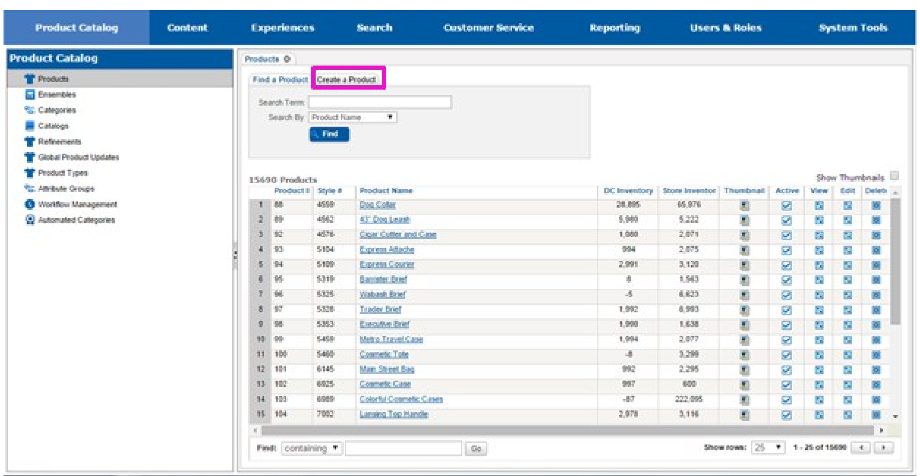
⇒ Select PRODUCT CATALOG.

⇒ Select PRODUCTS from the left-hand pane.

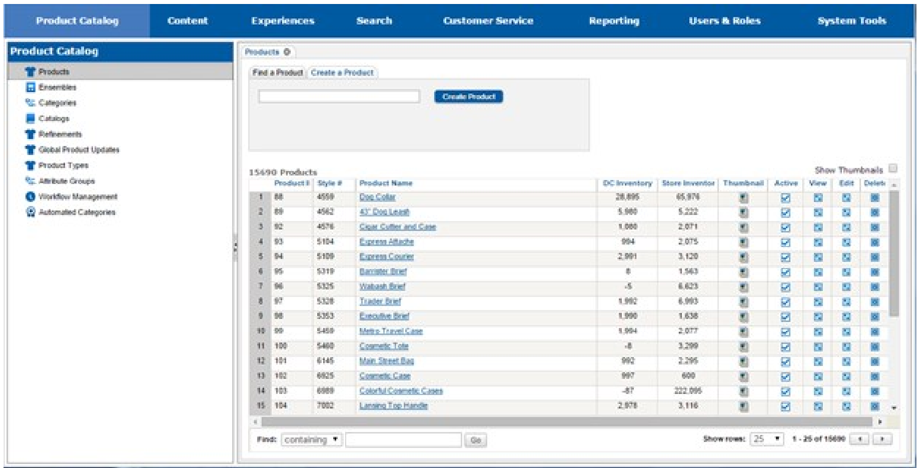


You will have a choice of finding a product or creating a product. We will be creating a new product.

⇒ Select CREATE A PRODUCT.

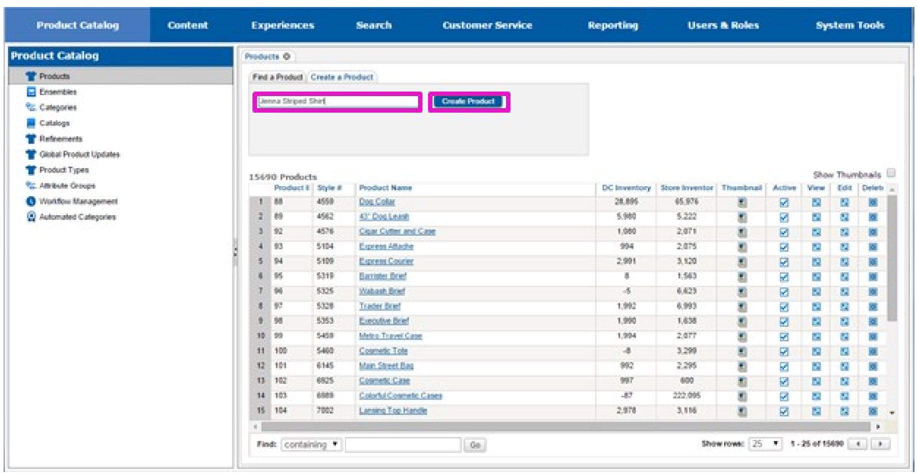


The page will refresh and you will see fields for entering a product name.

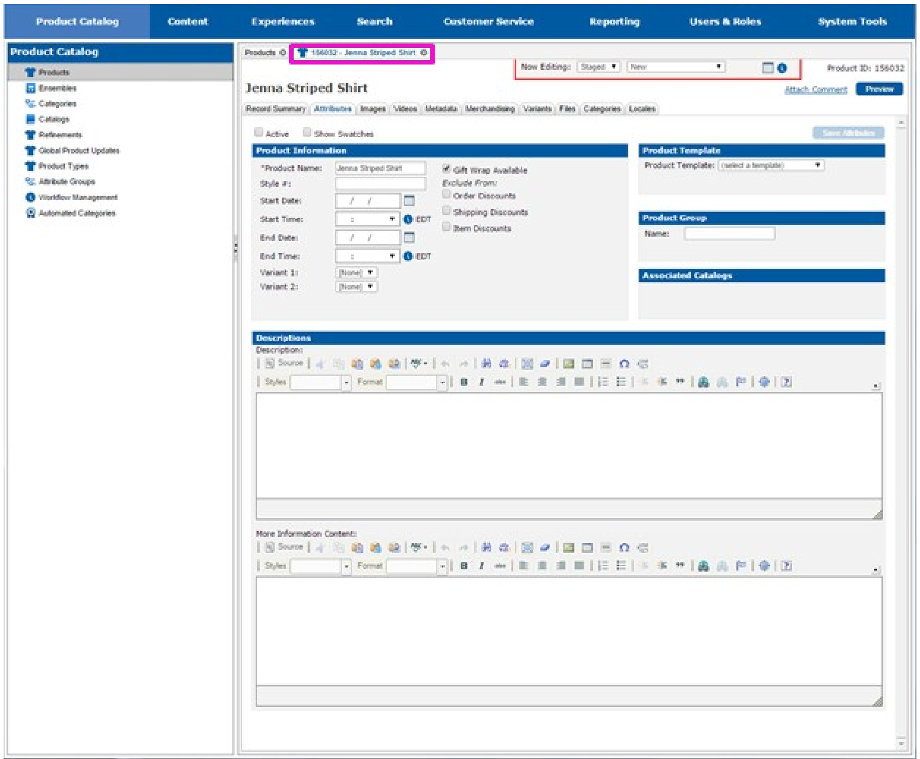


⇒ In the text box, enter the name of the product.

⇒ Select CREATE PRODUCT.



A new tab will appear that contains a number of individually tabbed panes. The header of the new tab contains the product number and name of the new product.



Each pane presents a different type of information that you can enter for the product. Each of the following sections will walk you through entering information in a particular pane. If any pane is not pertinent to your product, you may skip the information in that pane and move on to the next pane.

See also

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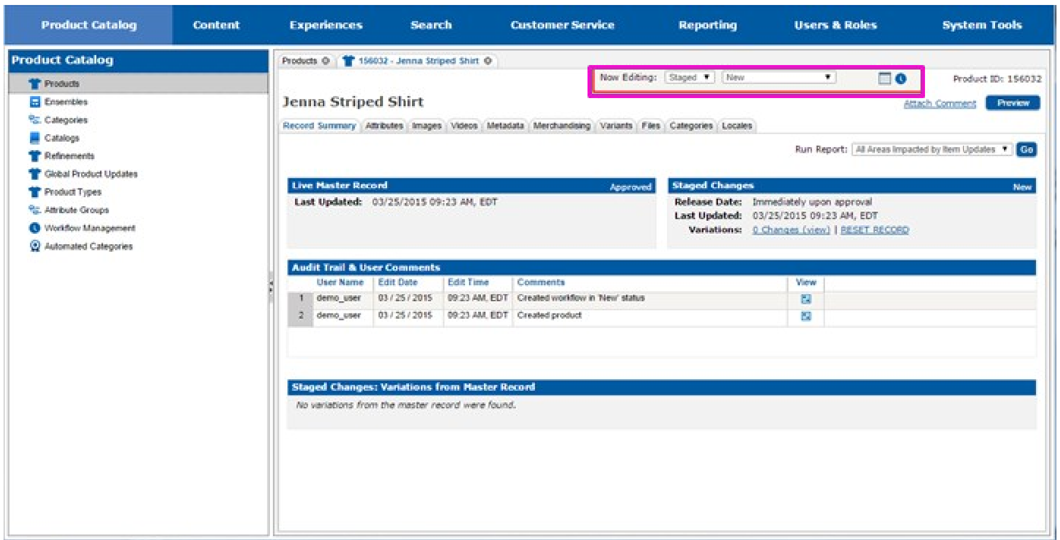
Home > Tutorials > Creating New Products > Setting the Workflow Status

Setting the Workflow Status

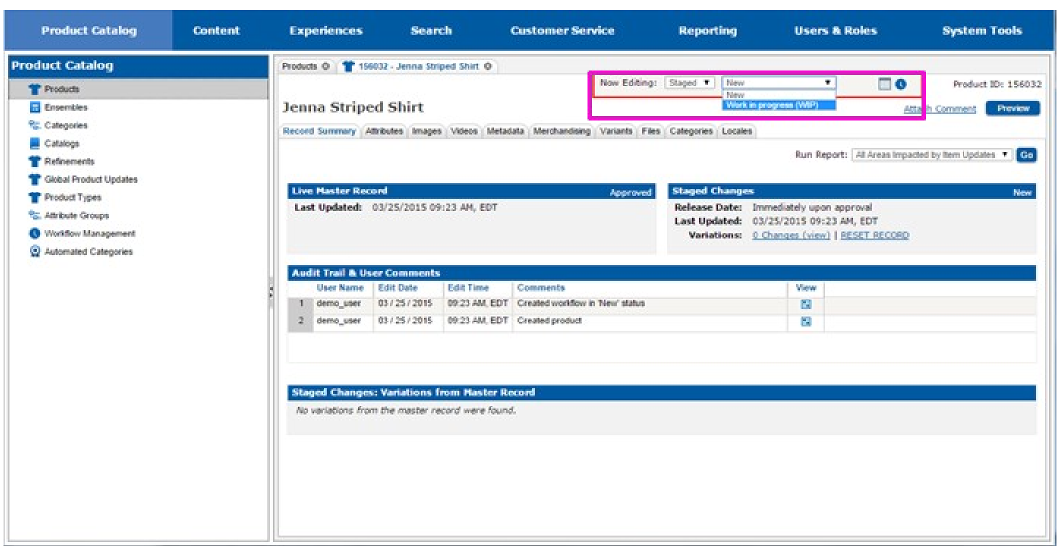
The RECORD SUMMARY pane shows the changes that have occurred to the version of the product you working with. At any point in time, there are at most two versions of a product: the "master" version, which is the version that is live on the site, and the "staged" version, which is the version that is not live and is potentially undergoing changes. A product only has a staged version if there are changes actively underway for it. A new product will have a staged version, as changes are in progress for it, but no master version, because there is no version of it currently live on the site.

When a product is created, a staged version with the status of NEW is created. Staged versions with a status of NEW, however, cannot be edited until the workflow status has been changed to indicate that the version is being worked on. You will need to change the status to WORK IN PROGRESS (WIP) before you can continue entering information for the product.

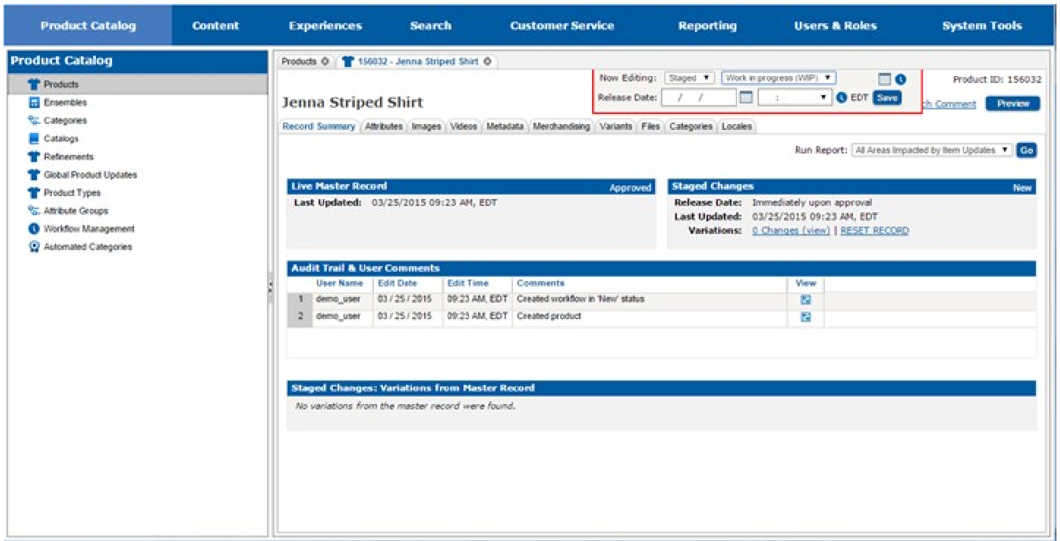


⇒ Select the workflow status drop-down list box.

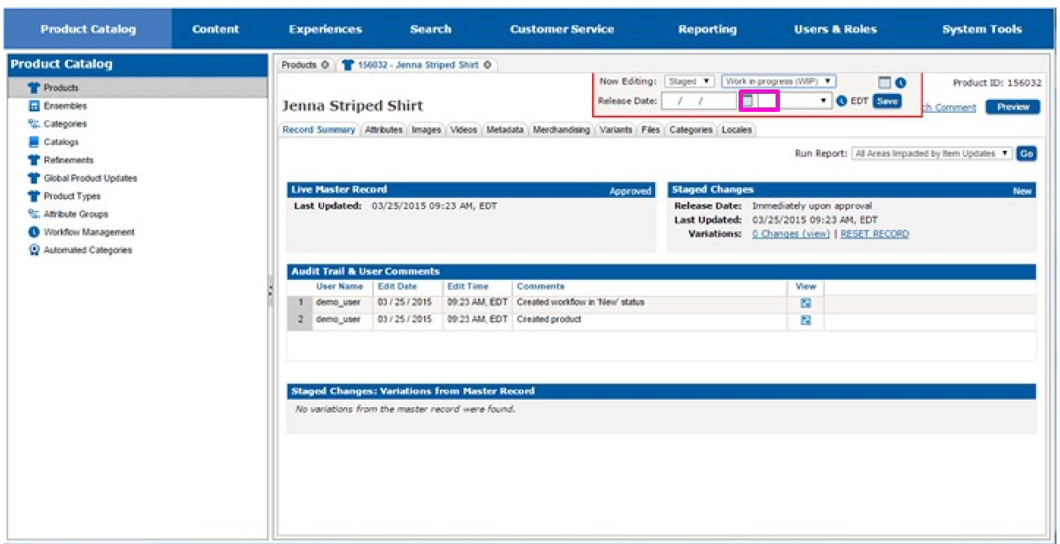
⇒ Select WORK IN PROGRESS (WIP).



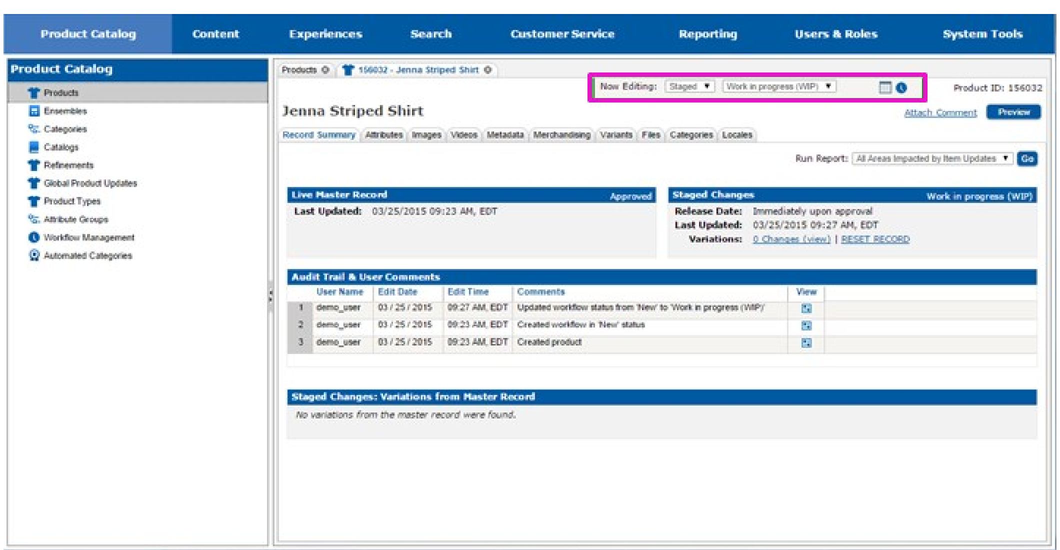
The page will redraw and you will see the workflow status area has expanded.



⇒ Select SAVE to save the change in workflow status.



The page will redraw and you will see the status has been updated.



See also

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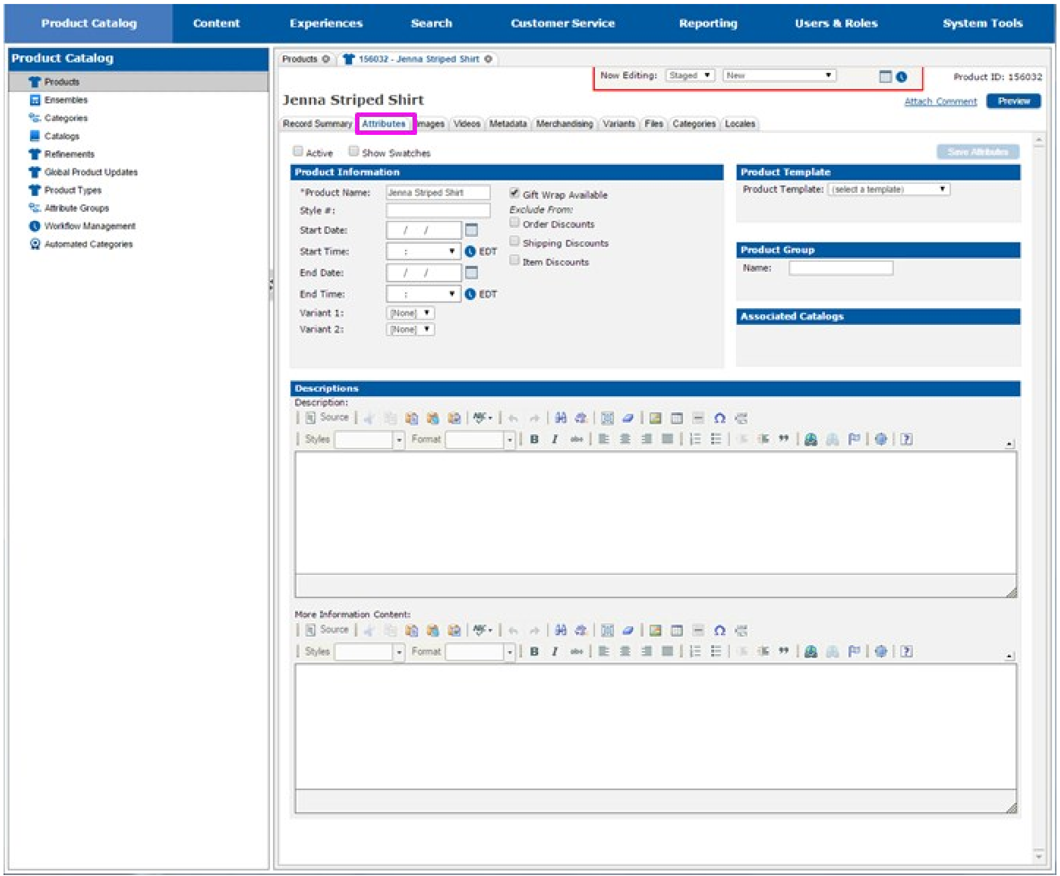
Home > Tutorials > Creating New Products > Assigning Attributes

Assigning Attributes

The ATTRIBUTES pane contains entry fields for most of the information that is displayed when the product is shown on the website. This information gathered in this pane affects the appearance of the product on the website more than any of the other panes.

⇒ Select the ATTRIBUTES tab.



PRODUCT NAME will already be filled in for you. Fill in the rest of the fields as follows:

⇒ If the product should be considered active immediately, select the ACTIVE checkbox. Inactive products will not appear on the website.

⇒ If color swatches should appear on the product page, select the SHOW SWATCHES checkbox.

⇒ Enter your style number for the product in the STYLE # field. Style number is an optional field.

⇒ If there is a brand name for the product, enter it in the BRAND NAME field.

⇒ If your product should not become active until a particular date, select the calendar icon for START DATE to choose a start date for the product. Products with blank start dates will be considered available to start immediately.

⇒ If you do not want your product to become active until a particular time on the start date of your product, select the clock icon for START TIME to choose the time. You may also enter the time directly into the text field.

⇒ If your product has a specific date when it will no longer be available, select the calendar icon for END DATE to choose an end date for the product. Products with blank end dates will be considered available forever and will need to be manually deactivated if they become unavailable.

⇒ If you want your product to remain active until a particular time on the end date of your product, select the clock icon for the END TIME to choose the time. You may also enter the time directly into the text field.

⇒ If the product will have variants, use the VARIANT 1 list box to select the first variant for the product. This determines what the first choice or option will be when the product is being purchased.

⇒ If the product will have a second variant, use the VARIANT 2 list box to select the second variant for the product. This determines what the second choice or option will be when the product is being purchased.

⇨ If the product can be gift wrapped, select the GIFT WRAP AVAILABLE checkbox. If gift wrapping is unavailable for the product, do not select the checkbox.

⇨ If the product cannot be included in discounts that apply to an order, select the ORDER DISCOUNTS checkbox.

⇨ If the product cannot be included in shipping discounts, select the SHIPPING DISCOUNTS checkbox.

⇨ If the product cannot be discounted, select the ITEM DISCOUNTS checkbox.

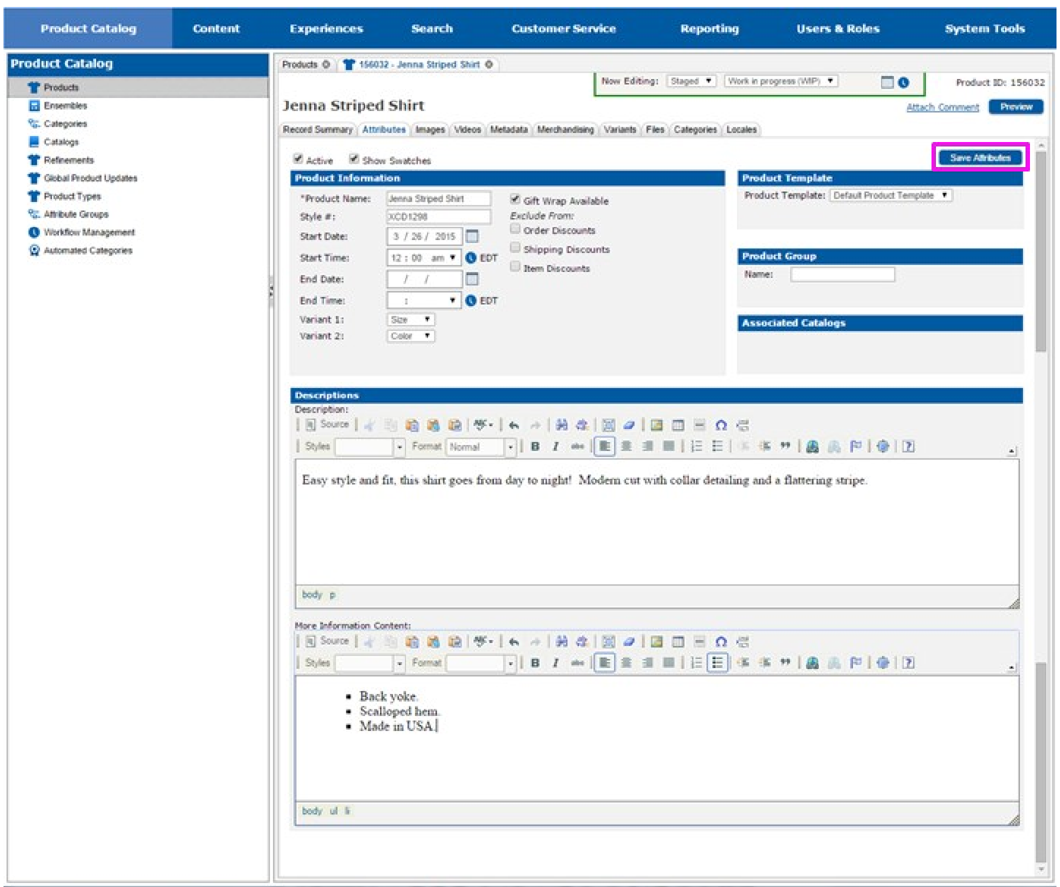
⇨ Use the PRODUCT TEMPLATE drop-down list box to alter the way the details page of the product will appear on the site. If a template is selected, the product details page will be rendered according to the page layout defined in the template. If a template is not selected, the product details page will be rendered according to the page layout defined for the category the product will be included in, or according to the page layout defined for the site, if the category does not have its own layout.

⇨ If the product will be part of a product group, enter the name of the group in the NAME text field. Product groups can be used in Experience Management for experiences that take into consideration the product(s) a visitor to the website interacts with.

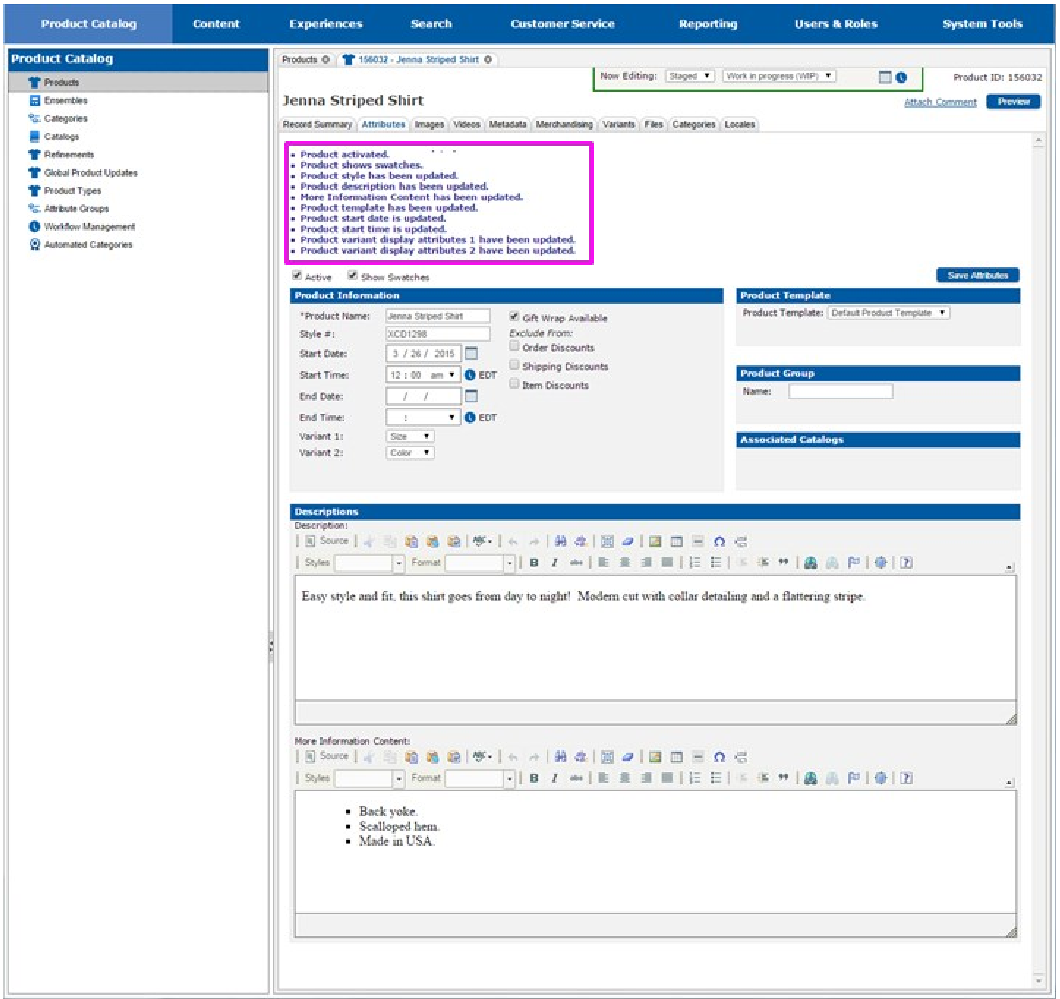
⇨ Enter a description for the product in the DESCRIPTION entry field. The description is the text that will appear when the product is displayed on the website. Use the formatting options to format the description as desired.

⇨ Enter any additional information for the product in the MORE INFORMATION CONTENT entry field. This text will be displayed separately from the product description text when the product is displayed on the website. This text is generally used for additional product detail that supplements the product description. Use the formatting options to format the additional information as desired.

⇨ Select SAVE ATTRIBUTES when you have entered all the information that is pertinent to your product.



The information you entered will be saved with the product. The page will redraw and you will see messages indicating what was saved. The messages you see may be different than the messages displayed below.



See also

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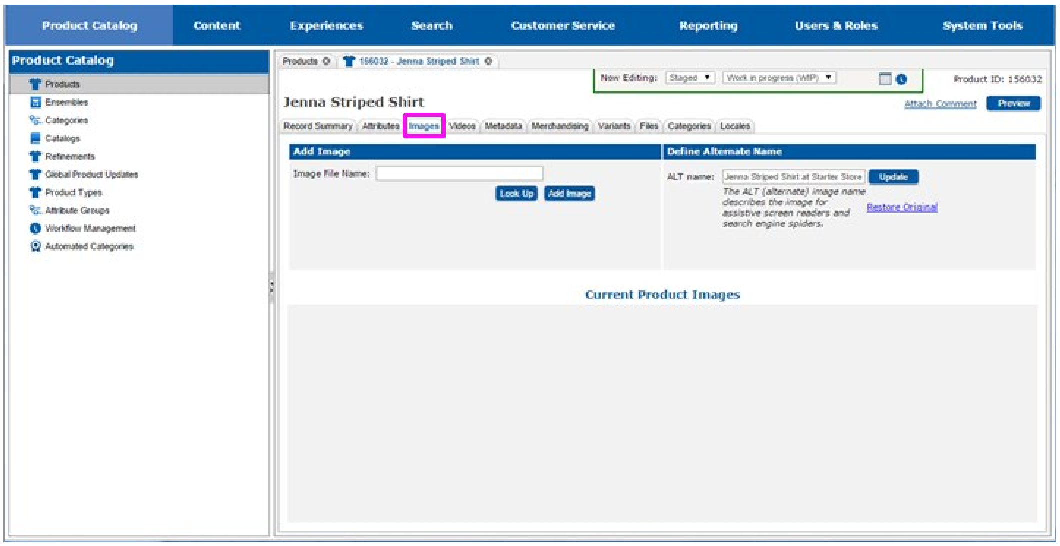
Home > Tutorials > Creating New Products > Assigning Images and Alternate Text

Assigning Images and Alternate Text

The information gathered on the IMAGES tab defines the images that are available for display for the product. The alternate text for the product is also defined on this tab. The alternate text is the text that will appear if the image is unavailable and it is also read by screen reader programs, which assist visually challenged visitors to the site.

⇒ Select the IMAGES tab.

The page will redraw and you will see the fields to enter the images for the product.



On this tab you will upload all of the images that can be used for this product. You can also modify the alternative name for the product. There is only one alternative name for the product and it is associated with each image, regardless of how many images are associated with the product.

To enter images for the product, follow the steps in section Entering Images. To modify the alternate name for the product, follow the steps in section Modifying Alternate Text.

See also

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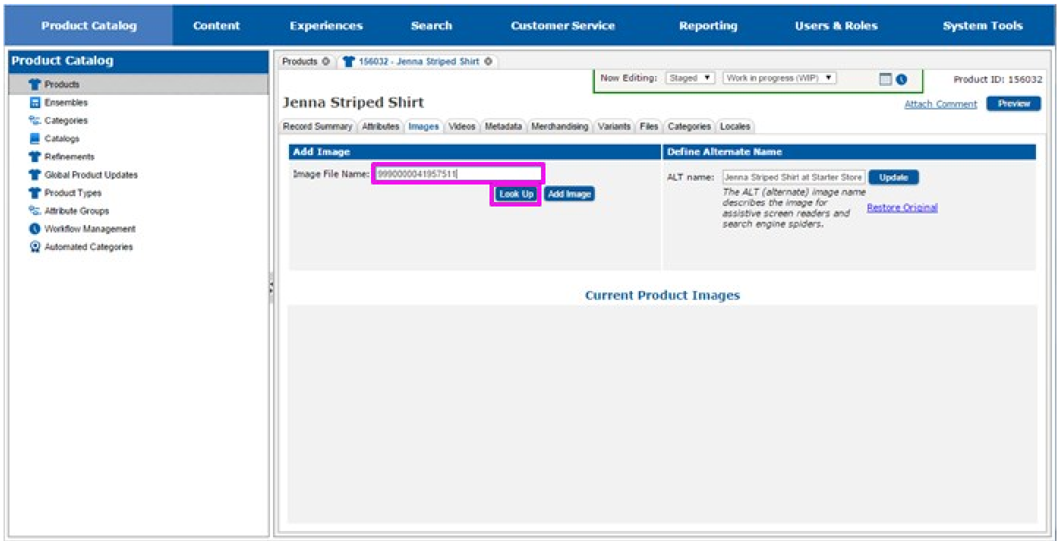
Home > Tutorials > Creating New Products > Assigning Images and Alternate Text > Entering Images

Entering Images

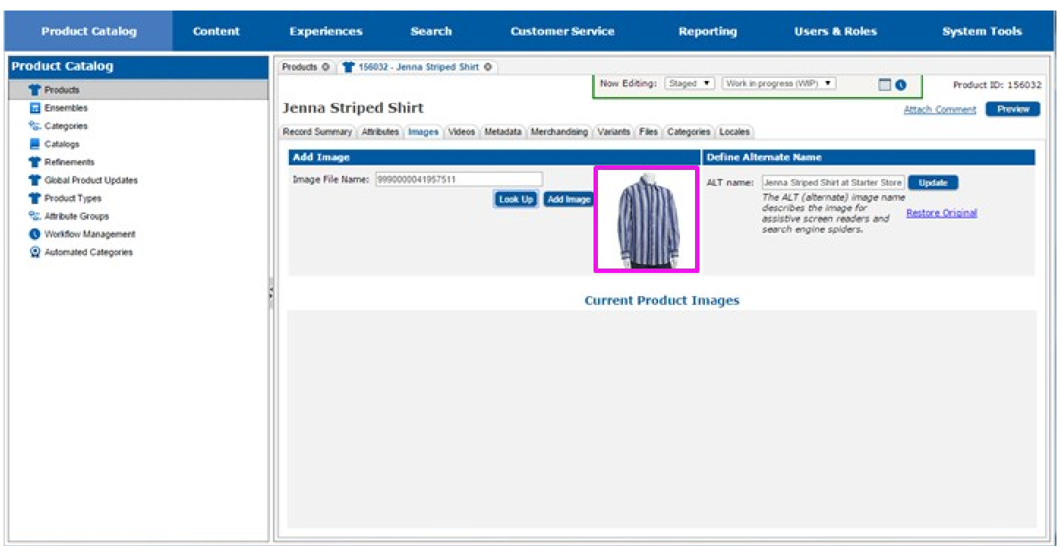
Image files are added singly for each product. In the base implementation, images files are loaded into the image server outside of the Site Manager, and then linked to products within the Site Manager. Image file names are entered in the Site Manager, and then used locate the image in the image server.

⇒ Enter the name of the image's file in the IMAGE FILE NAME text field.

⇒ Select the LOOK UP button.

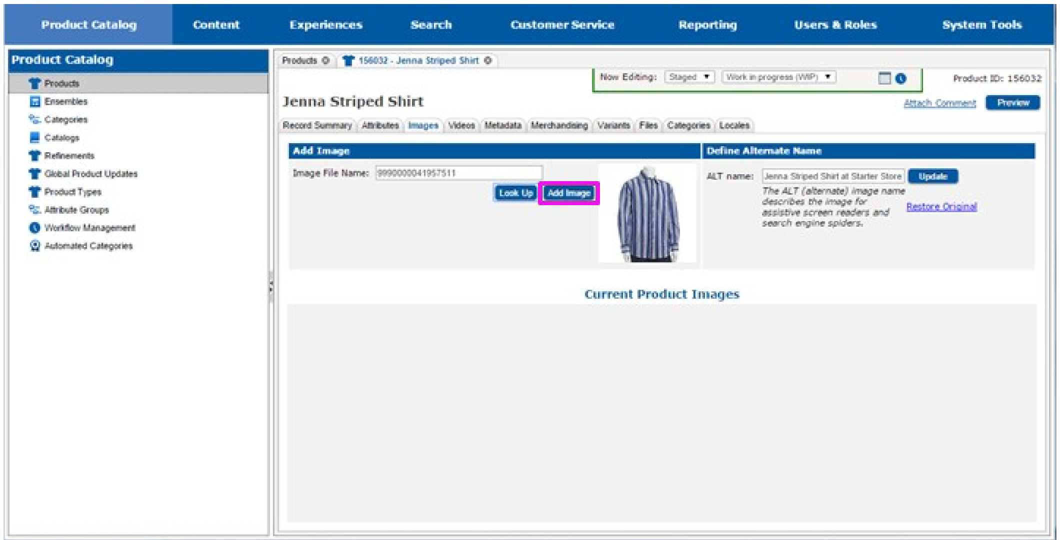


If an image file with a matching name is found on the image server, a thumbnail of the image will be displayed. If no matching image is found, an error message will be displayed.

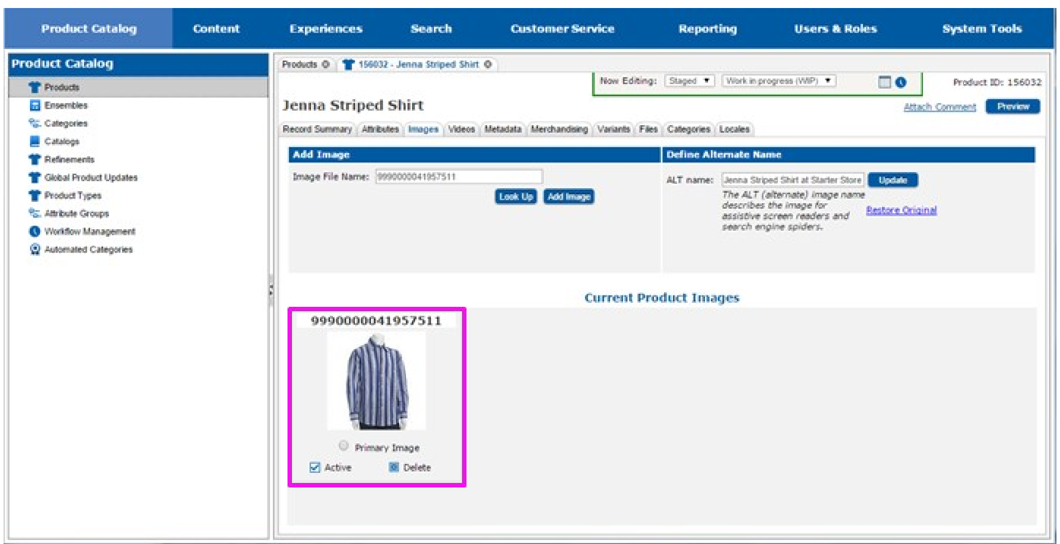


If the thumbnail displayed is not that of the image you wish to add to the product, repeat the steps above of entering the image file name and searching the image server for a matching image file. If thumbnail is of the image you wish to add to the product, continue on in this procedure to add it.

⇒ Select the ADD IMAGE button.

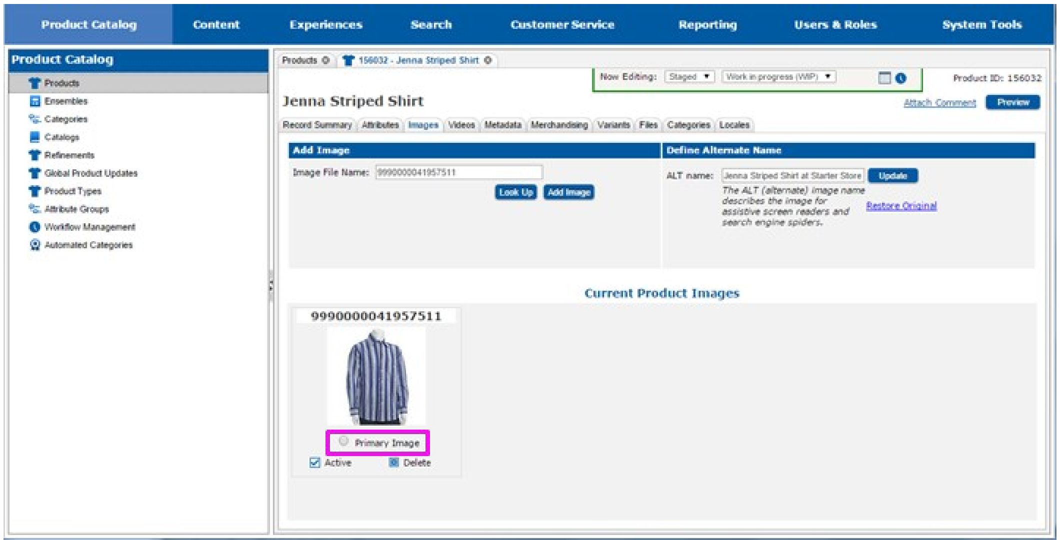


The image will be added to the CURRENT PRODUCT IMAGES section of the page.



Repeat the steps above for each image associated with the product.

⇒ Select PRIMARY IMAGE under the image that is the main image for the product.



See also

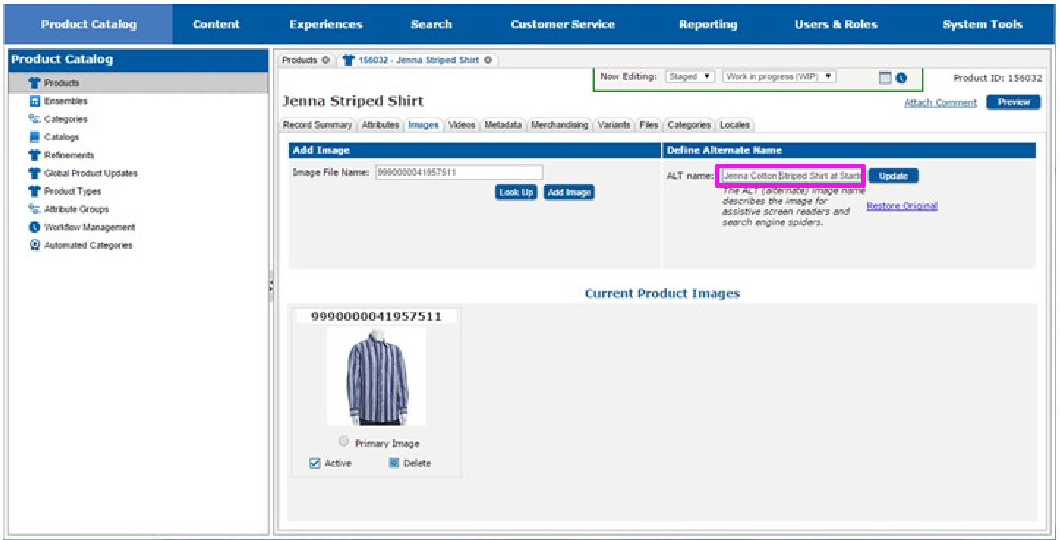
Modifying Alternate Text

Home > Tutorials > Creating New Products > Assigning Images and Alternate Text > Modifying Alternate Text

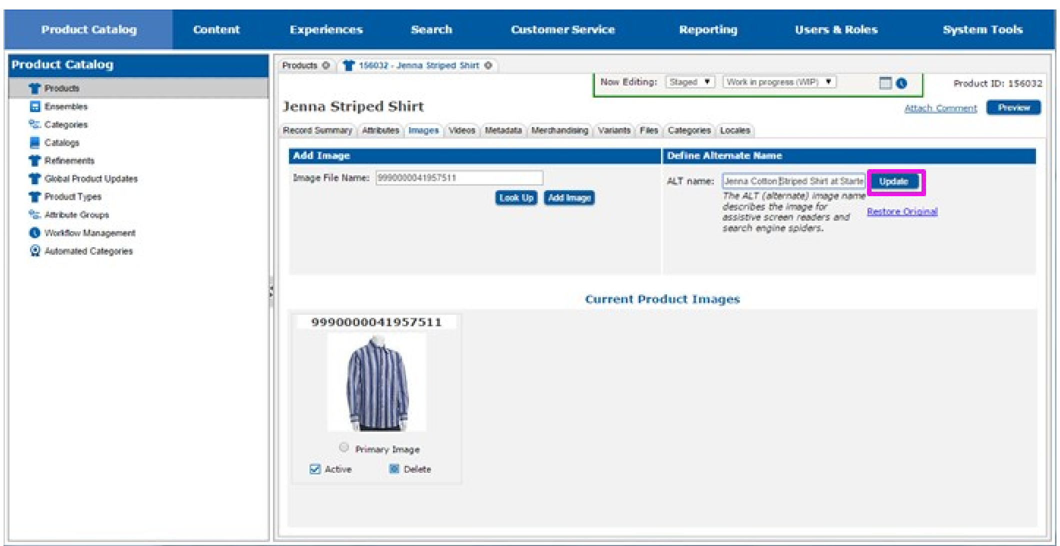
Modifying Alternate Text

When a product is added to the product catalog, a value is created for the alternate text for all of the images associated with the product. The value of the alternate text can be modified if different text is desired.

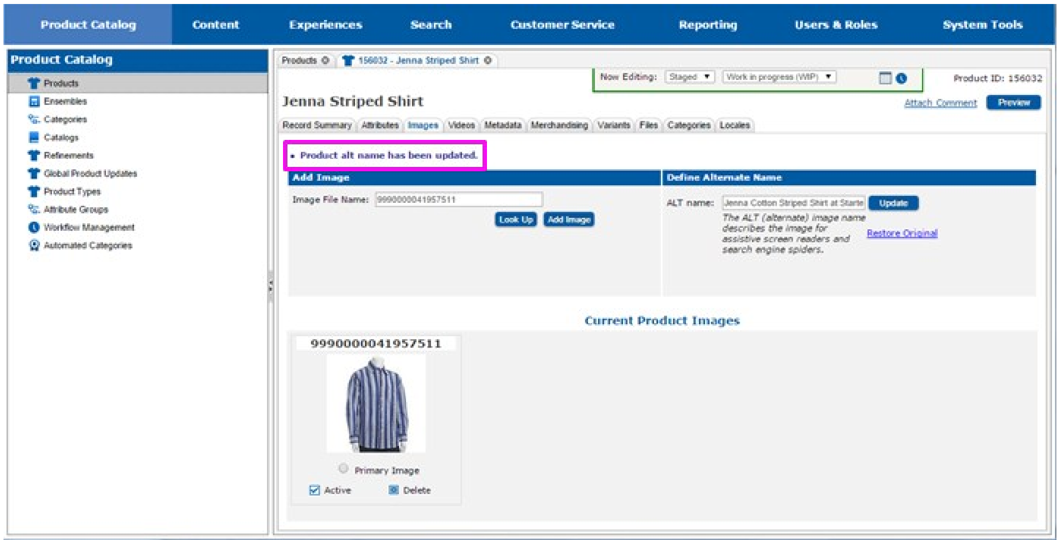
⇒ Enter the alternate text for the product in the ALT NAME text field.



⇒ Select UPDATE.



The page will redraw and you will see a message indicating the alternate text has been updated.



See also

[Entering Images](#)

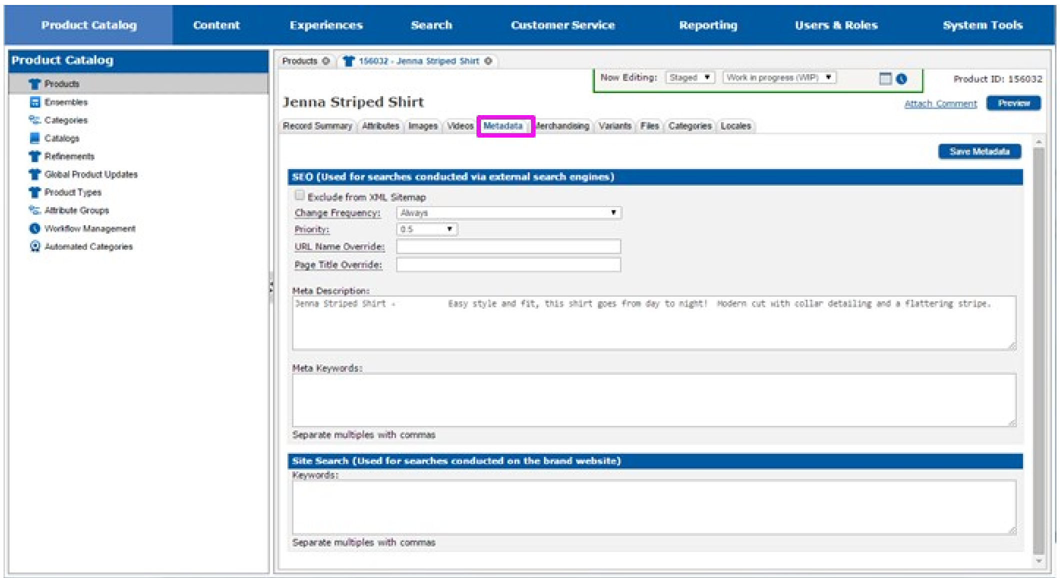
Home > Tutorials > Creating New Products > Assigning Search Engine Data and Search Keywords

Assigning Search Engine Data and Search Keywords

The METADATA tab allows you to enter search related items for the product. Information for external search engines is entered in the SEO portion of the page. This information includes the search terms that the product will be considered a match for. It also includes a description that can be used by the external search engine to describe the product.

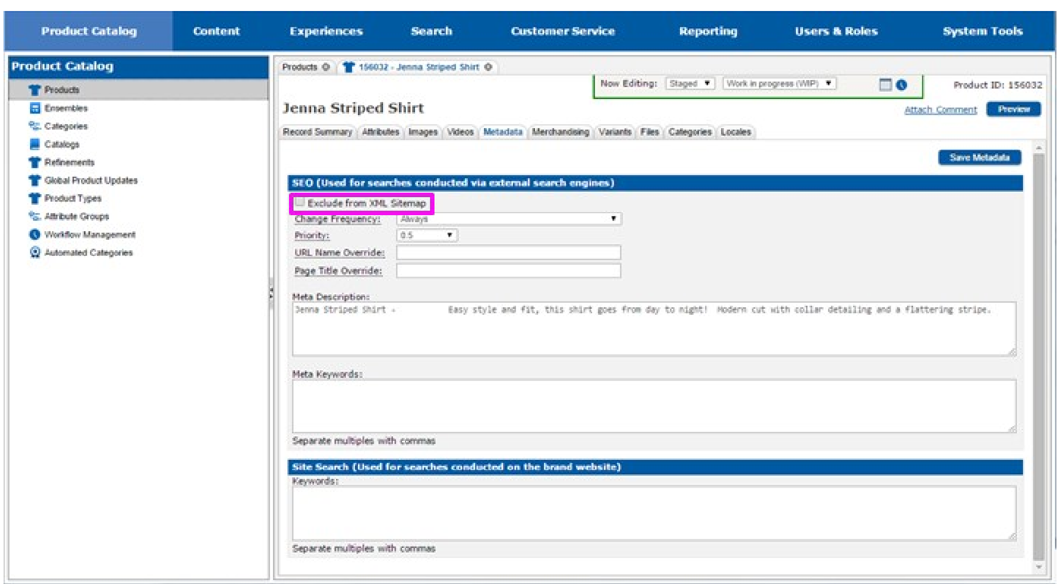
Search engine keywords are entered in the SITE SEARCH portion of the page. It is important to assign search keywords to your product so that the product will be easy to find on the website. The product will be returned in the search results each time one of the keywords is used in a search.

⇨ Select the METADATA tab.

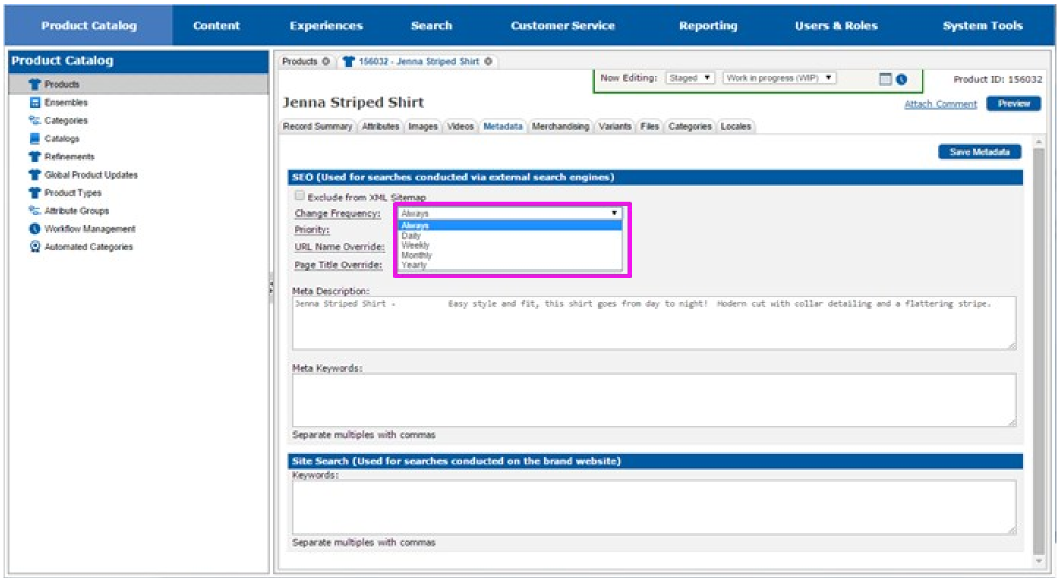


The page will redraw and you will see the fields to enter the search engine data and search keywords for the product.

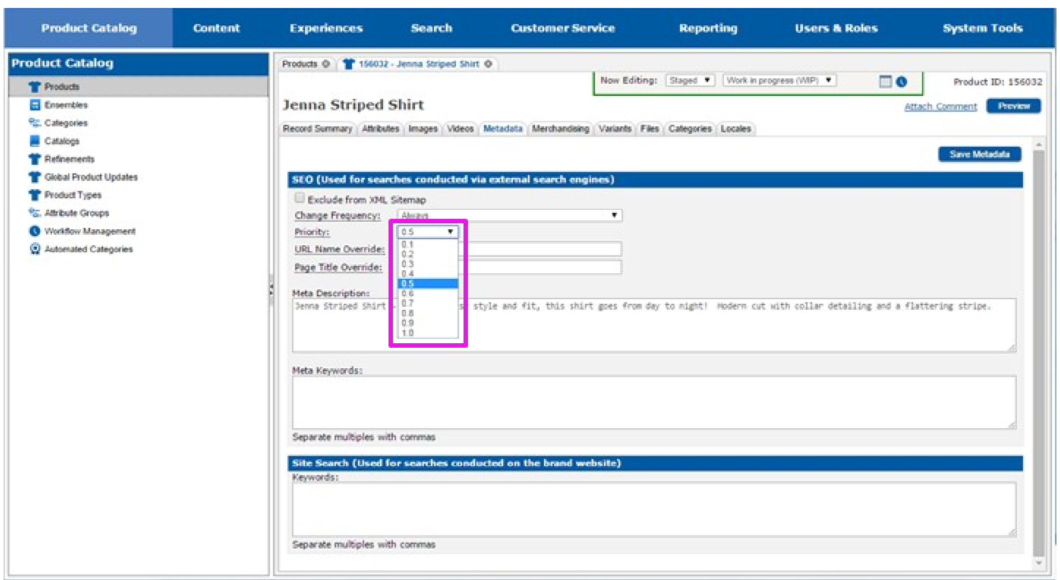
⇨ Select the EXCLUDE FROM XML SITEMAP checkbox if you want the detail page for the product to be excluded from the sitemap for the site.



⇨ Select a CHANGE FREQUENCY for the product detail page. This will be included in the sitemap for the site, and indicates how frequently the detail page for the product changes.

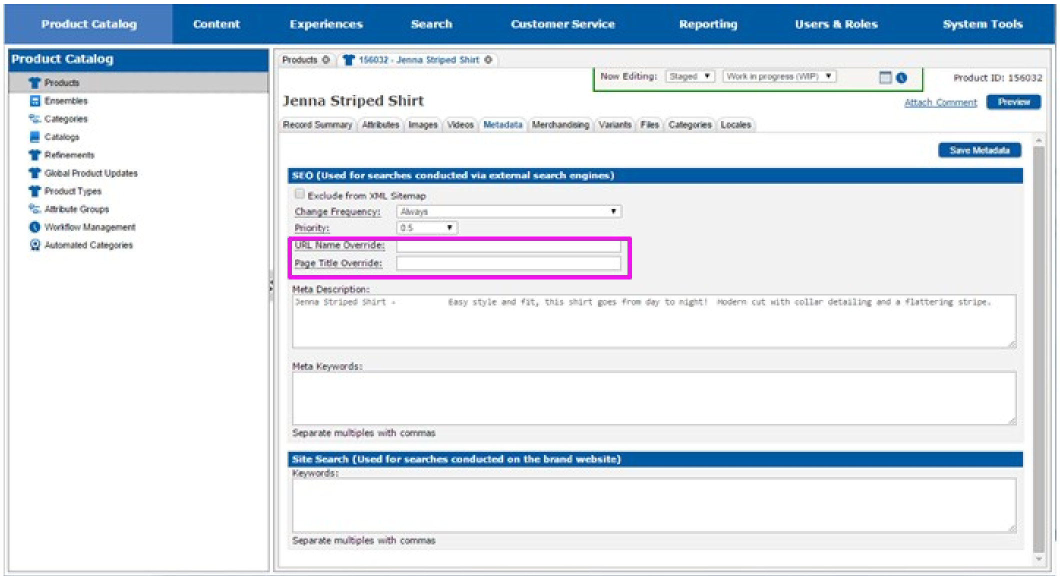


⇨ Select a PRIORITY for the product detail page. The priority indicates how important the product's detail page is in relationship to the other pages on the site. The higher the priority, the higher the importance. The priority is included in the sitemap for the site.



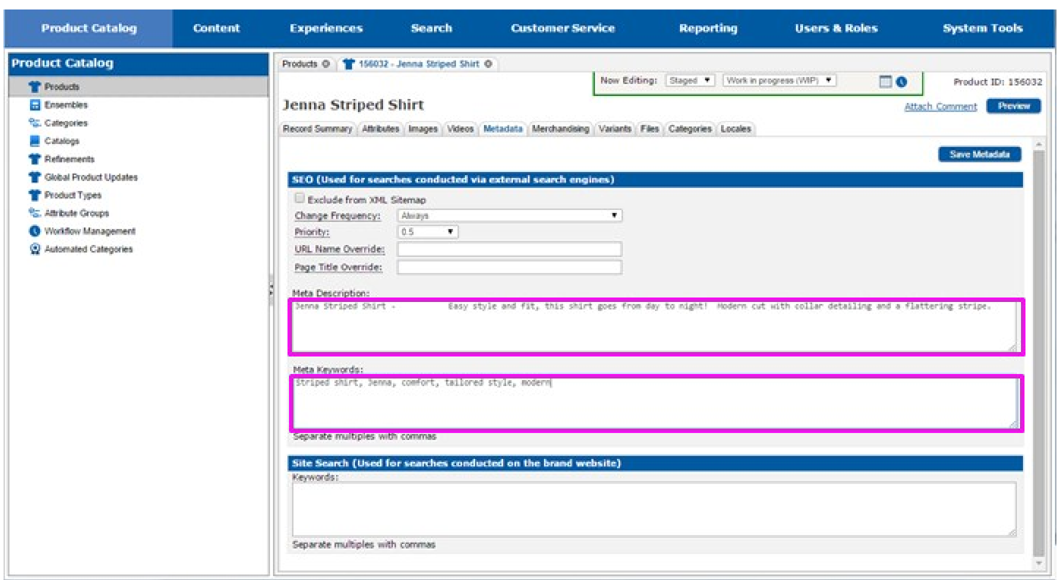
⇨ Enter a URL NAME OVERRIDE if you wish to override the name of the product in the URL for the product's detail page.

⇨ Enter a PAGE TITLE OVERRIDE if you wish to override the HTML title of the product's detail page. The default page title is the name of the product, followed by the name of the site.

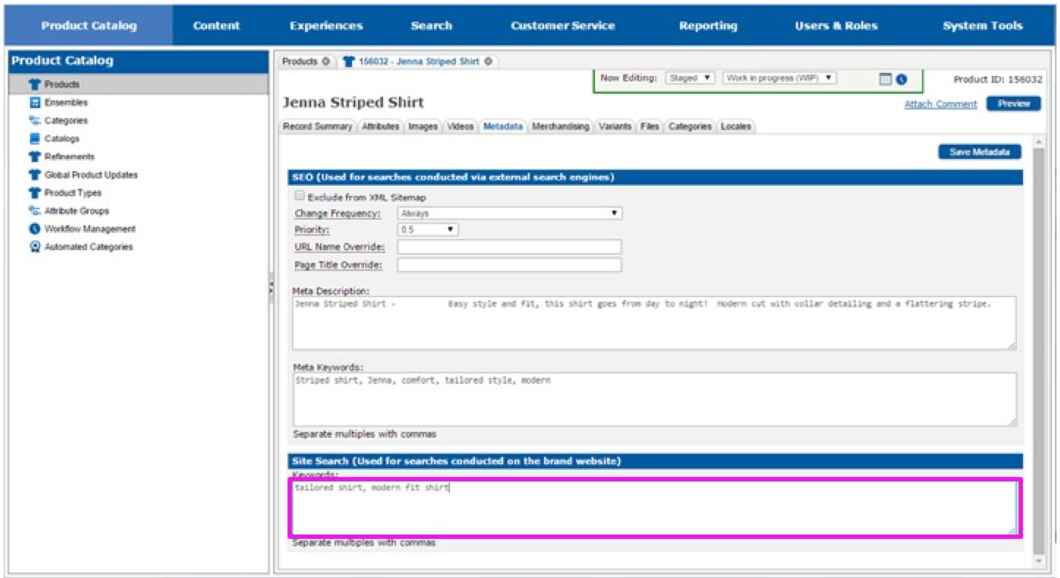


⇨ Enter the description that you want external search engines to use when they find this product in the META DESCRIPTION text field. This field will be pre-filled with the description of the product.

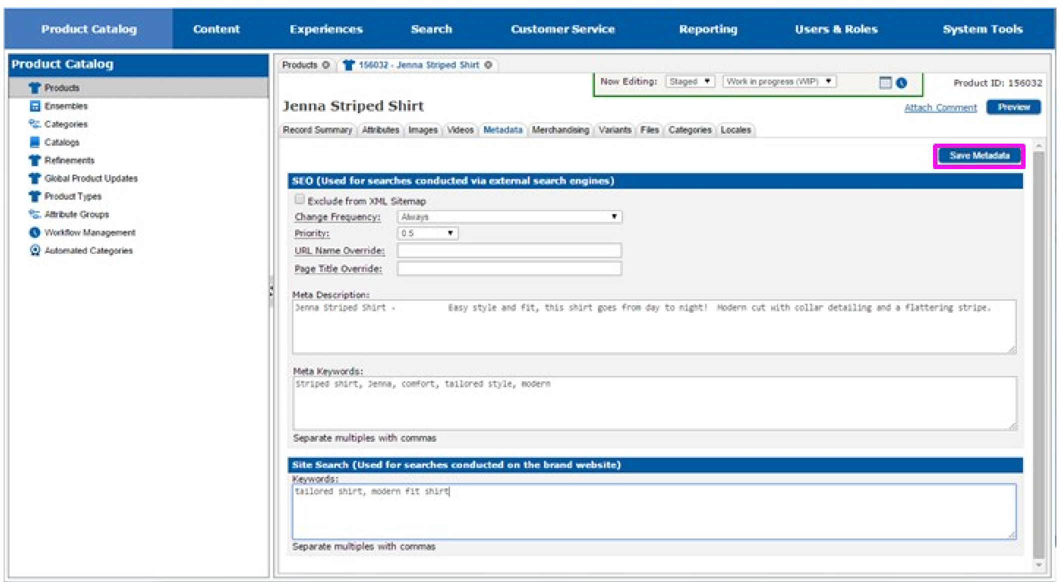
⇨ Enter all of the external search engine keywords this product should be considered a match for in the META KEYWORDS text field. If you are entering more than one keyword, separate them with commas.. Meta keywords will appear in the source of any page they appear on. (Note that the use of meta keywords by external search engines is declining.)



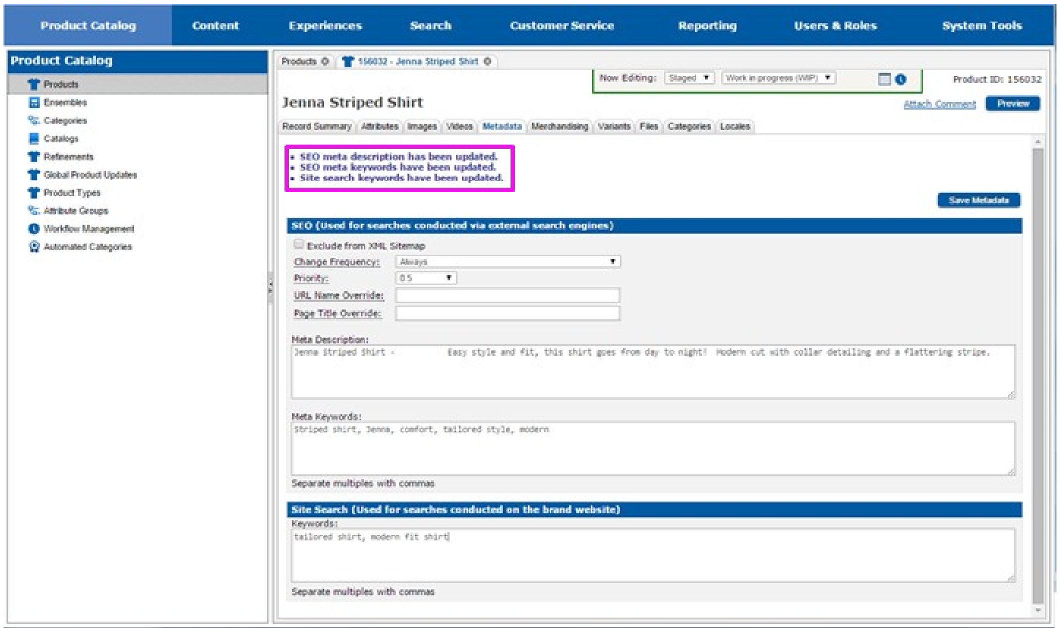
⇨ Enter all of the site search keywords for the product in the KEYWORDS text field. If you are entering more than one keyword, separate them with commas.



⇨ Select SAVE METADATA when you have entered all the information.



The page will redraw and you will see a message indicating the new information has been saved.



See also

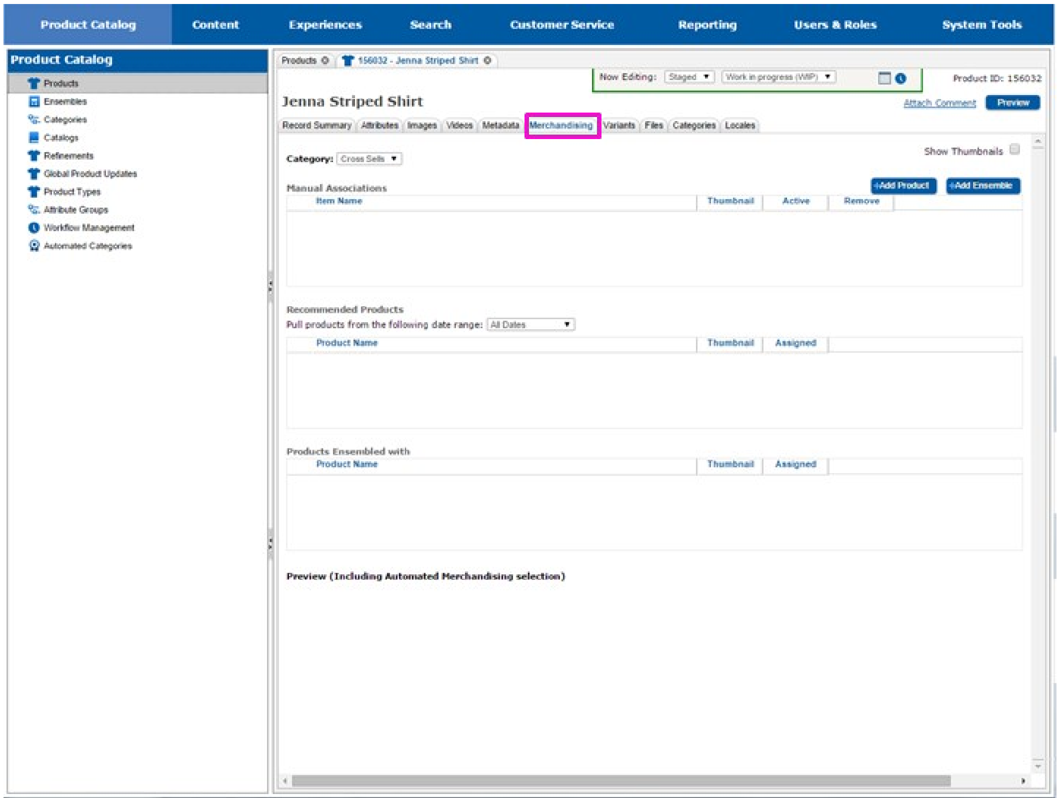
Before You Begin
The Example Used
Create a New Product
Setting the Workflow Status
Assigning Attributes
Assigning Images and Alternate Text
Assigning Cross Sells and Up Sells
Assigning Variants
Assigning Files
Optional - Assigning the Product to a Category
Optional - Customizing for Locales
Optional - Previewing the Product

Home > Tutorials > Creating New Products > Assigning Cross Sells and Up Sells

Assigning Cross Sells and Up Sells

Cross sells and up sells may be assigned to the product. The cross sells and up sells will be displayed with the product and while the visitor is purchasing the product. Cross sells and up sells are added on the MERCHANDISING tab.

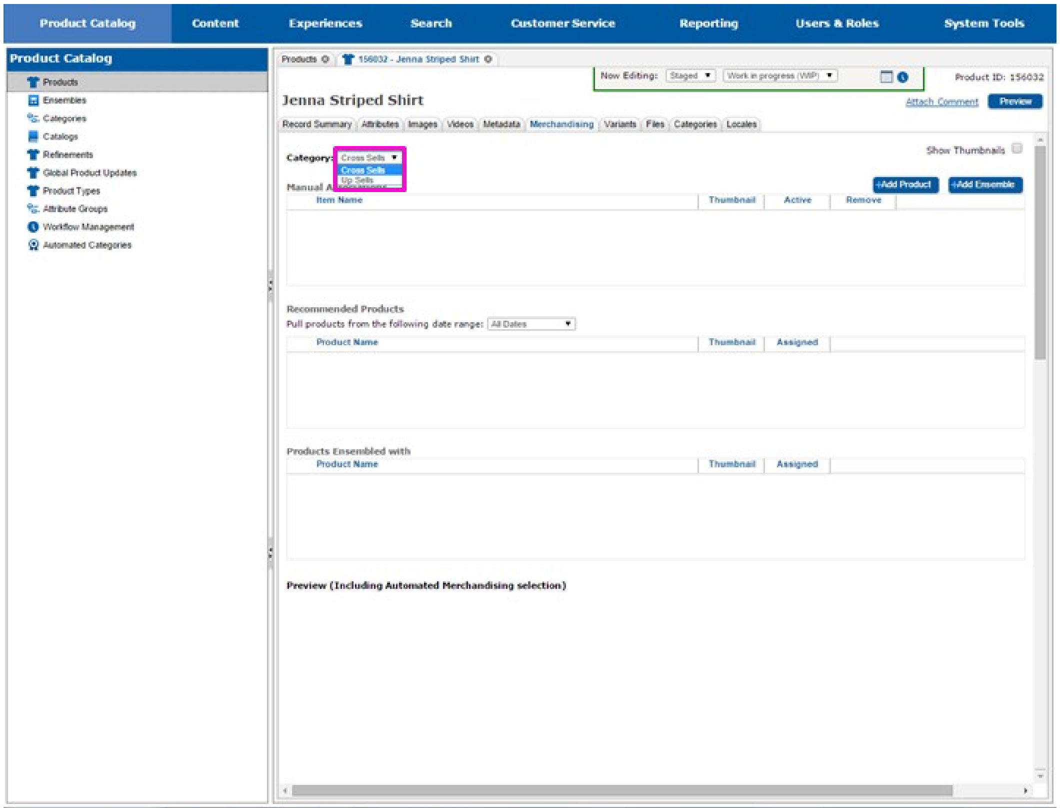
⇨ Select the MERCHANDISING tab.



There are three list boxes on this page: MANUAL ASSOCIATIONS, PRODUCTS PURCHASED WITH, and PRODUCTS ENSEMBLED WITH. You will be working with the first list box, MANUAL ASSOCIATIONS. Once the product is active on the site, PRODUCTS PURCHASED WITH and PRODUCTS ENSEMBLED WITH will contain lists of the products that were purchased with the new product and/or ensembled with the new product. Cross sells and up sells may be created using the products in these lists, but for new products the lists are empty.

The process to enter cross sells is the same as the process to enter up sells. The selection in the CATEGORY field indicates whether you are working with cross sells or up sells. You may need to change this selection if it does not match the relationship you want to work with.

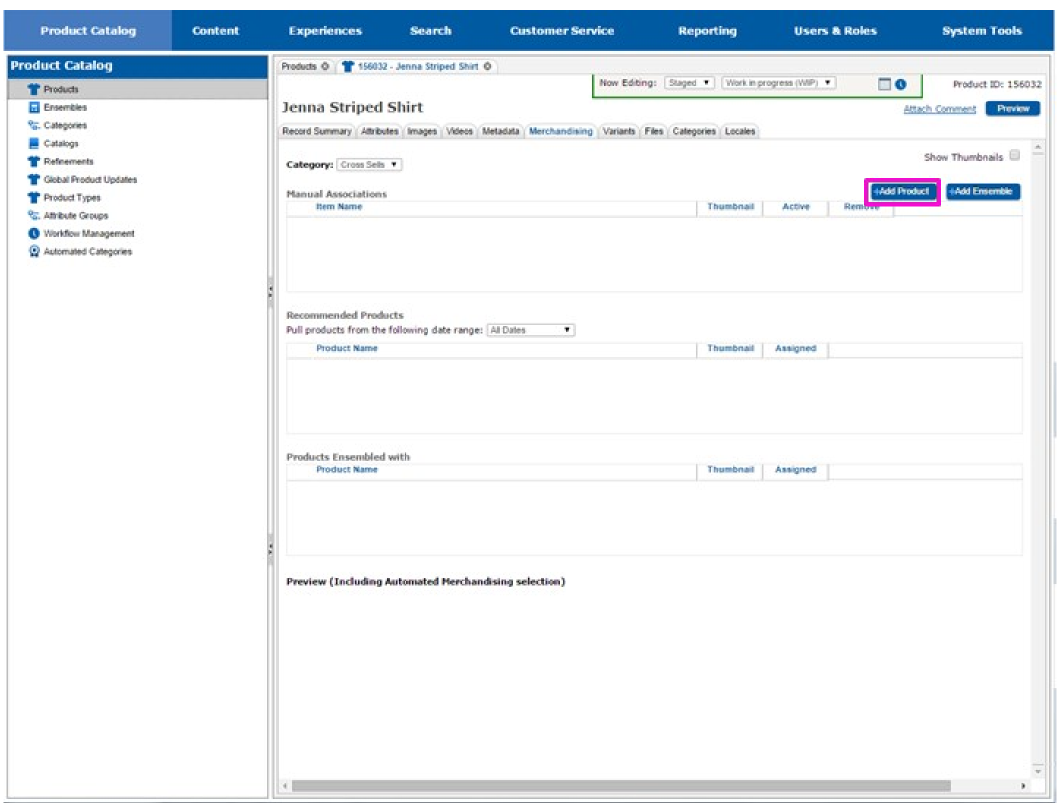
⇨ Select the CATEGORY drop-down list.



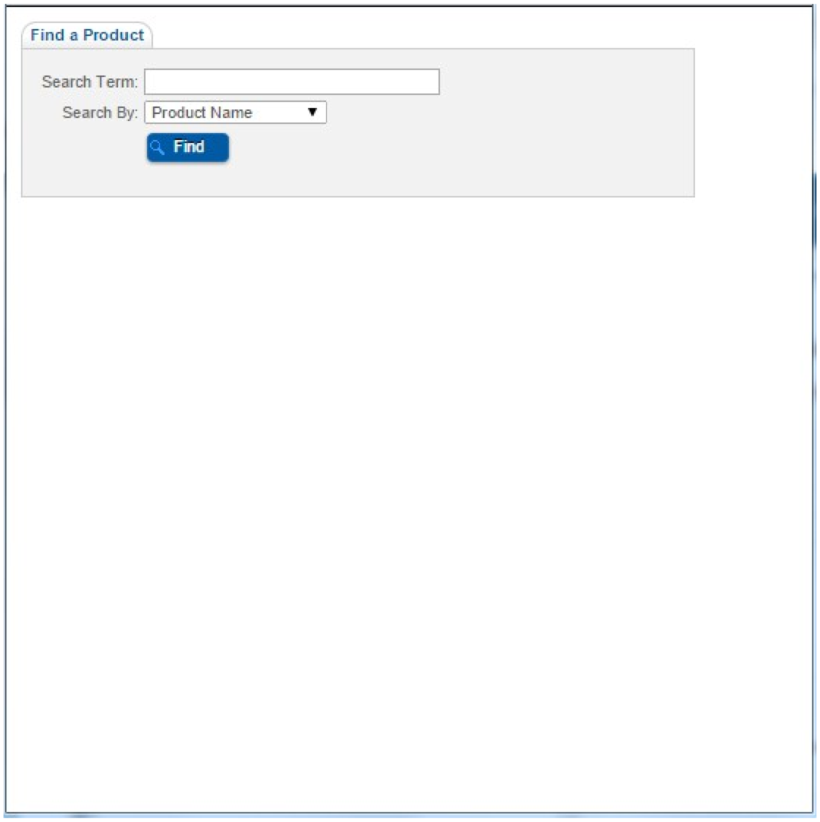
⇒ Select the type of relationship you want applied to the products you will be selecting.

For our example, we will add cross sells.

⇒ Select ADD PRODUCT. You may select ADD ENSEMBLE if you are adding an ensemble instead of a product.

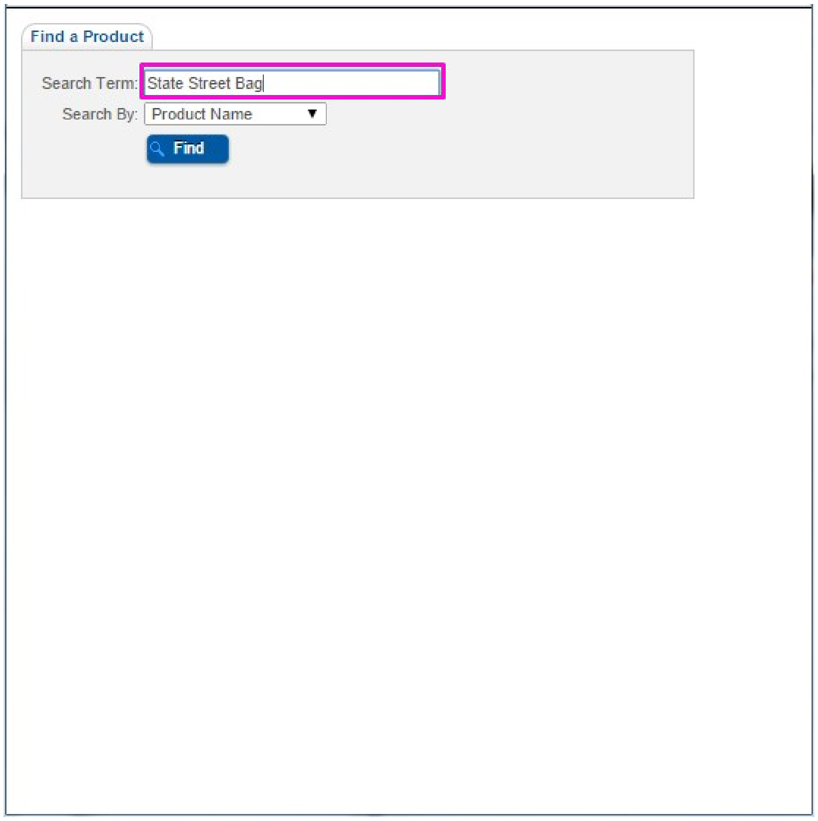


A new window will appear.

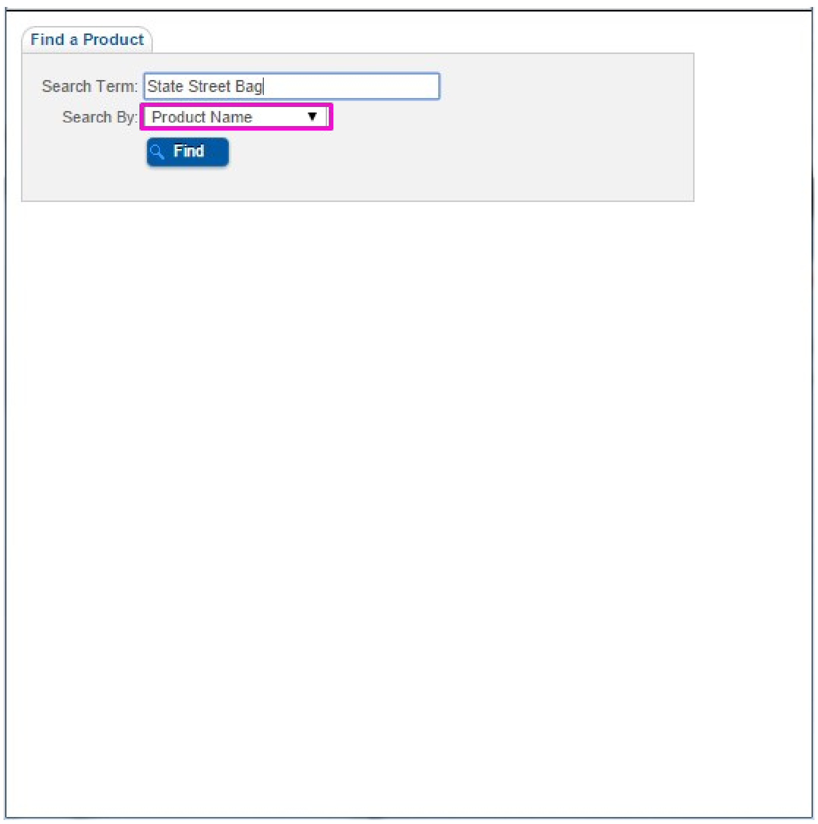


This product selection window is used to select the product(s) that should be added as cross sells to your product.

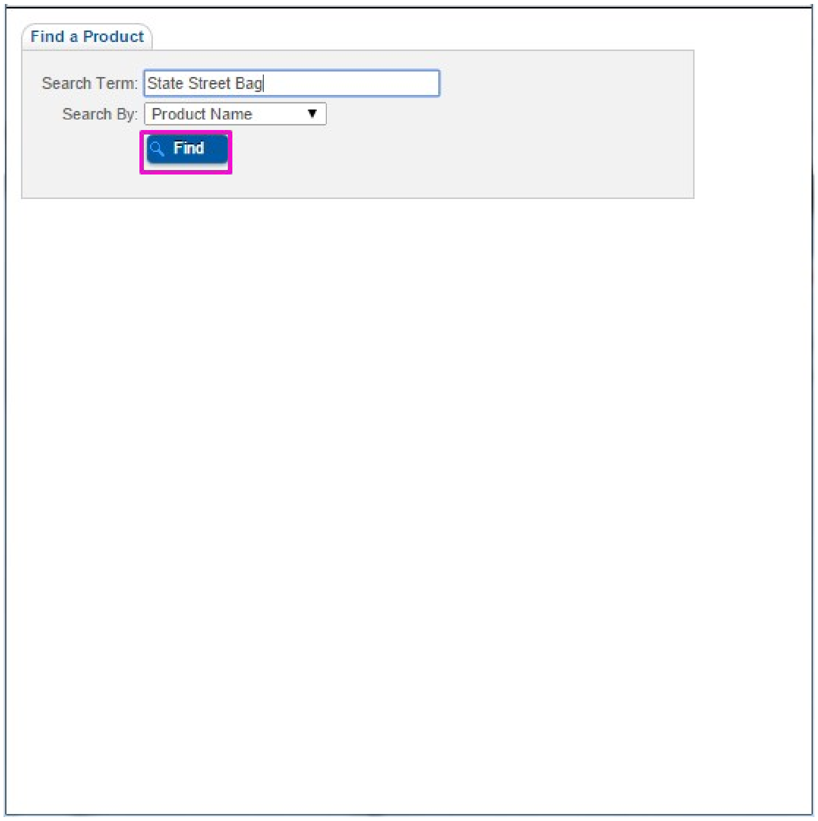
⇒ Enter the search criteria you are going to use to locate the product(s) in the text field.



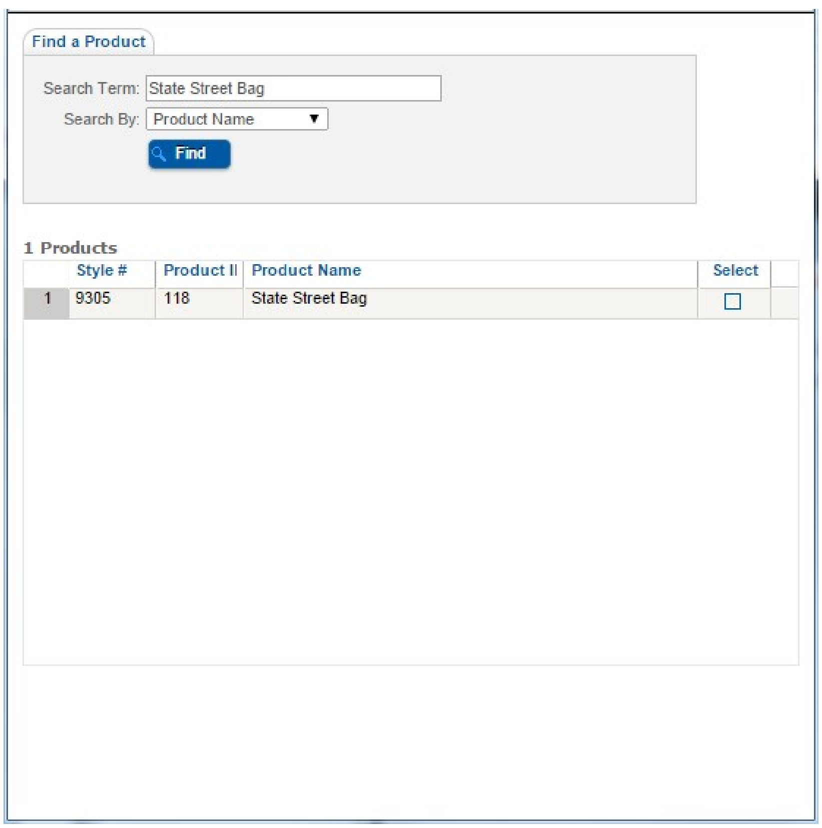
⇨ In the SEARCH BY drop-down list box, select STYLE #, KEYWORD, PRODUCT NAME, or CATEGORY ID to indicate how the search should be performed.



⇨ Select FIND.

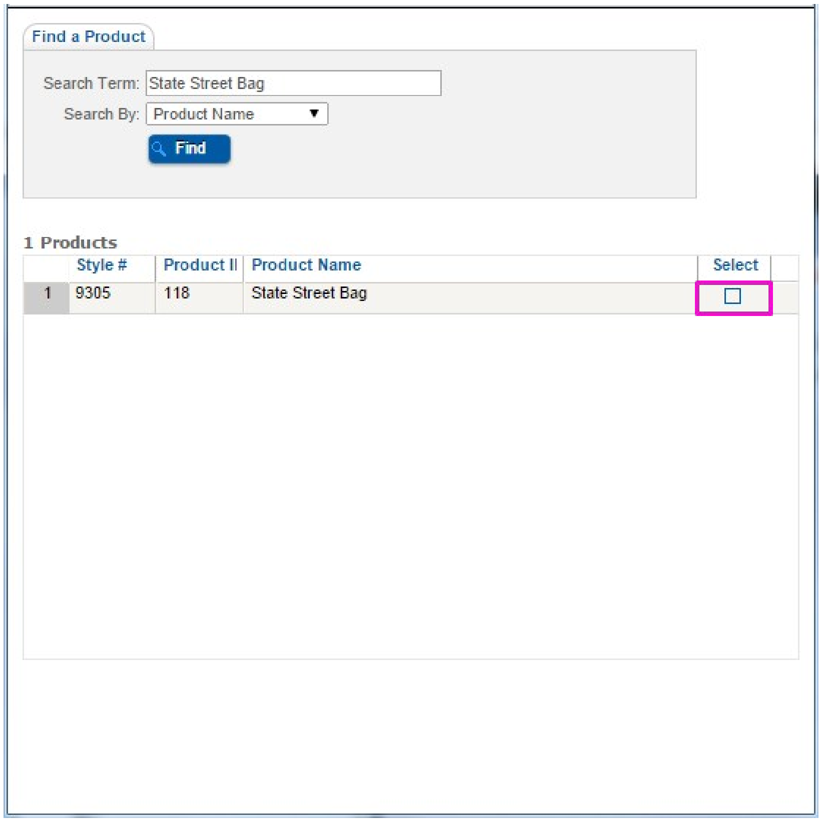


The window will redraw and you will see a list of all of the products that matched your search criteria.

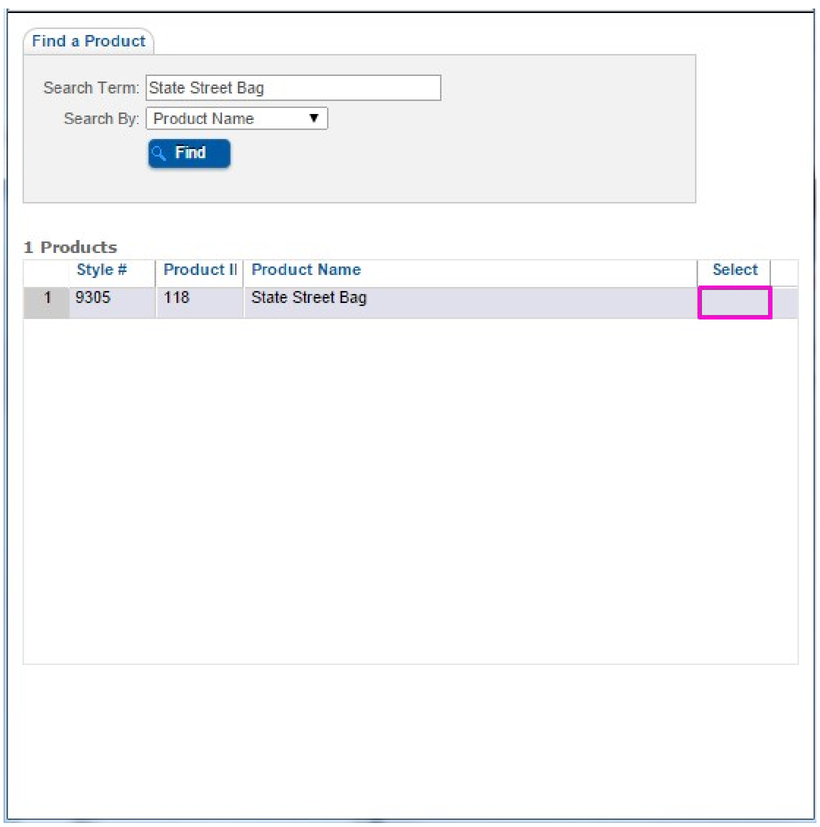


Each product in the list has a select box to the right of it. Selecting this box will add the product as a cross sell to your product.

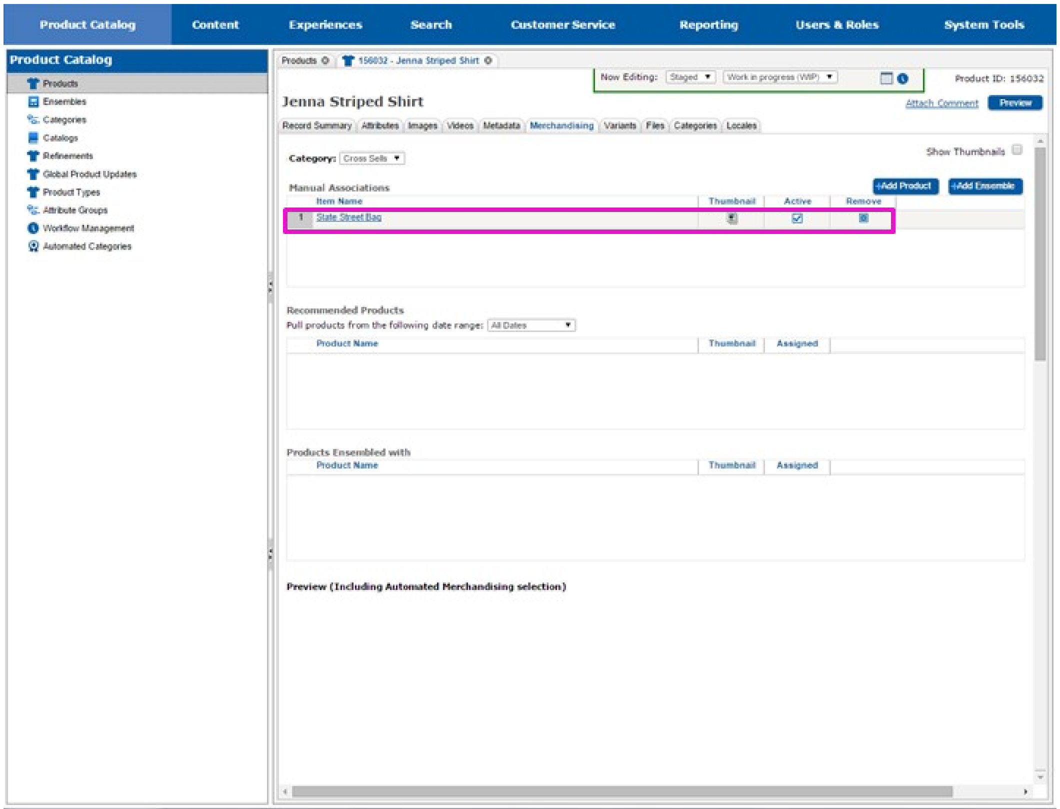
⇨ Select the SELECT checkbox for the product(s) that should be a cross sell for your product.



The window will redraw and you will see that your selection no longer has a checkbox to the right of it.



On the MERCHANDISING tab, you will see the product included in the MANUAL ASSOCIATIONS list.



⇒ Continue selecting products from the product selection window until you have selected all of the products that will be cross sells.

⇒ Close the product selection window.

The cross sells have now been added to the product.

⇒ Repeat the steps in this section if you want to add up sells.

See also

Before You Begin
The Example Used
Create a New Product
Setting the Workflow Status
Assigning Attributes
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Assigning Search Engine Data and Search Keywords
Assigning Variants
Assigning Files
Optional - Assigning the Product to a Category
Optional - Customizing for Locales
Optional - Previewing the Product

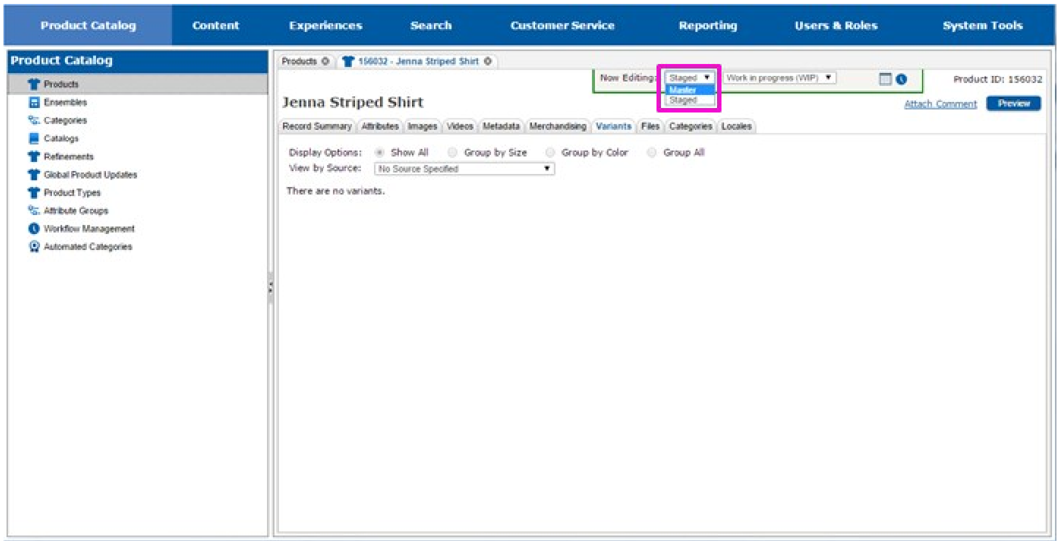
Home > Tutorials > Creating New Products > Assigning Variants

Assigning Variants

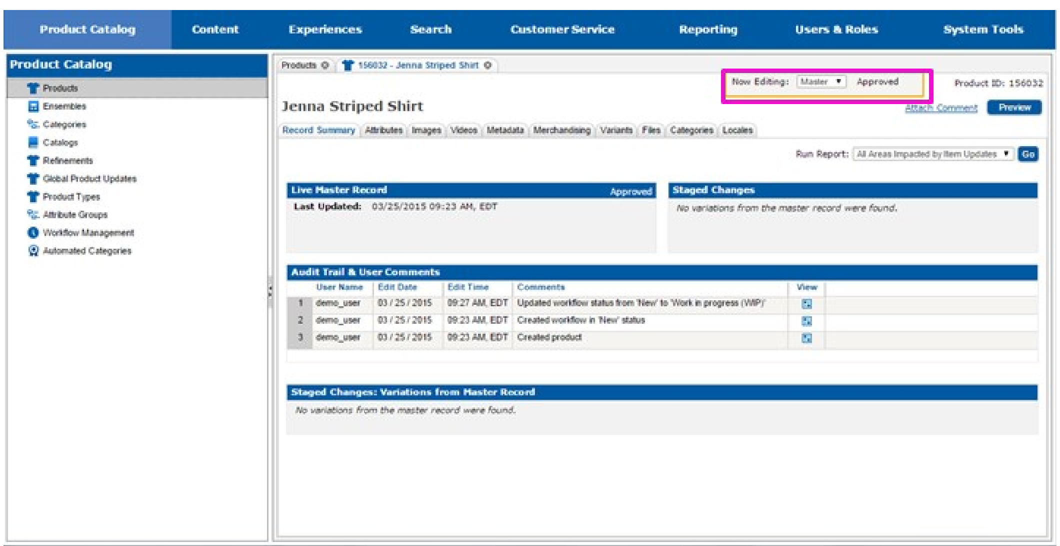
Variants are used when a product has a number of different variations that differ in only one or two ways. If your product has variants, it is important that you enter them so that a visitor may choose between them when purchasing the product. Variants are entered on the VARIANTS tab and may only be entered when editing the MASTER version of a product.

⇨ At the top of the page, select the version drop-down list next to NOW EDITING label.

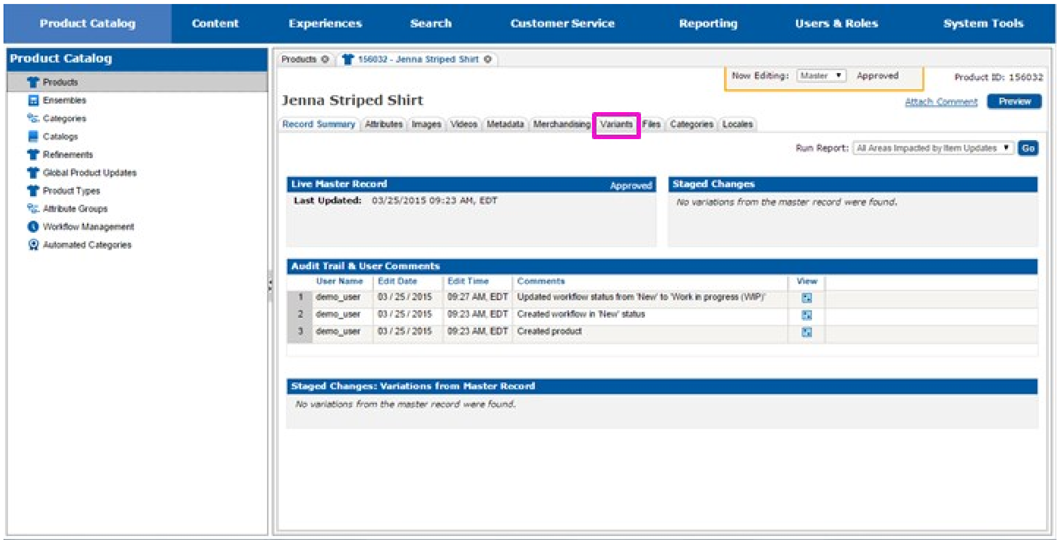
⇨ Select the MASTER version.



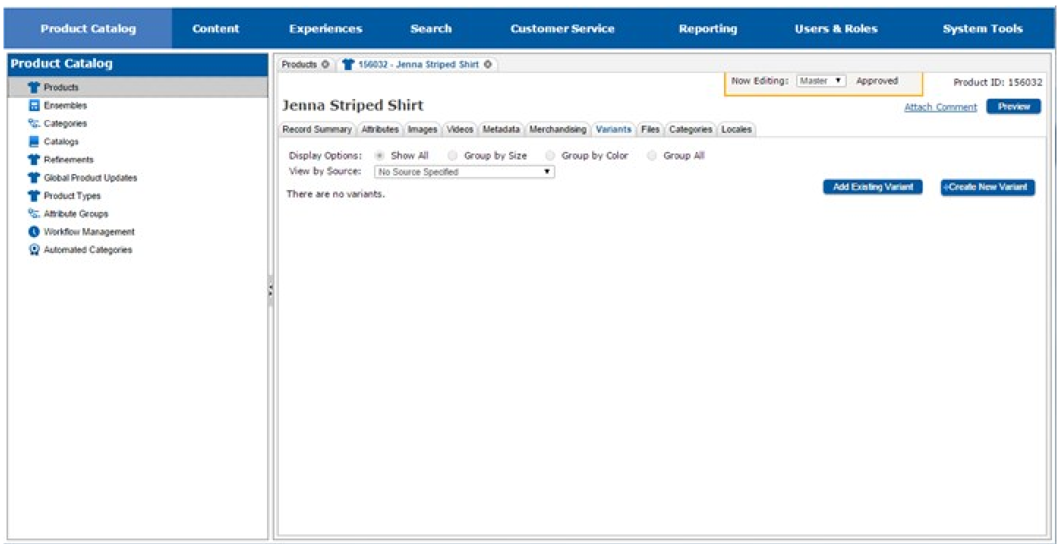
The page will redraw and you will see the RECORD SUMMARY tab. You will also see that the workflow status area at the top of the page has been updated to reflect that you are editing the MASTER version.



⇨ Select the VARIANTS tab.

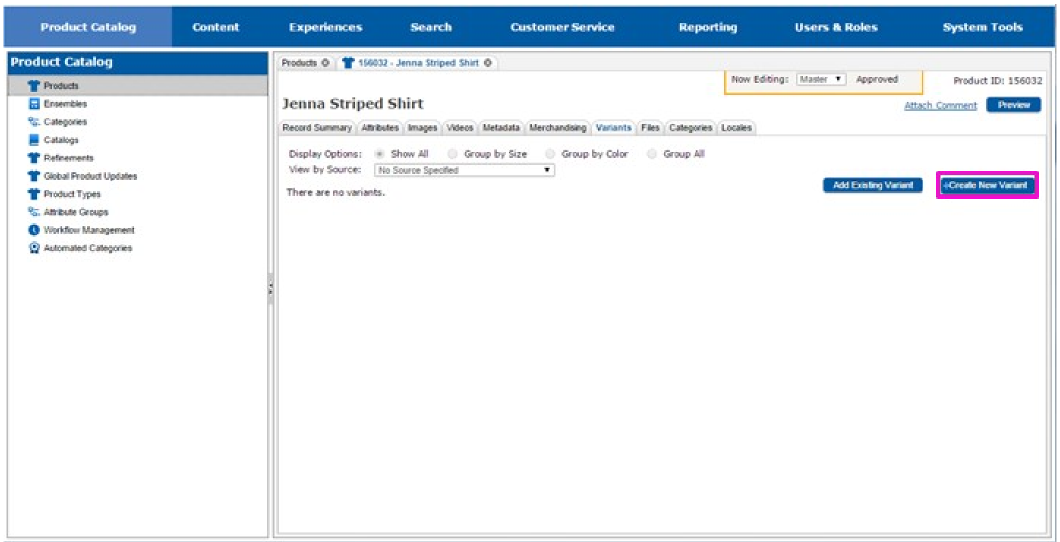


The screen will redraw and you will see the VARIANTS tab.

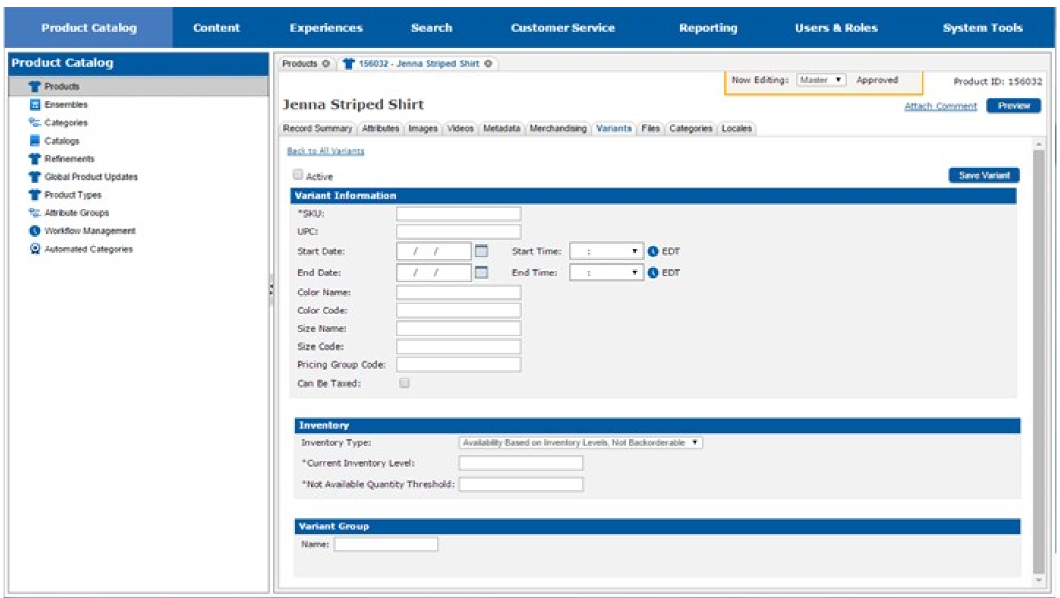


You can create new variants for the product or associate existing variants with it. For our example we will create new variants.

⇒ Select CREATE NEW VARIANT.



The page will refresh and you will see the fields for creating new variants.



Most of the fields in the page are optional, but as many should be filled in as are applicable to your product.

⇒ Select the ACTIVE checkbox to make the variant active. Inactive variants will not be available as options for the product.

⇒ Enter the variant's SKU in the SKU text field.

⇒ Enter the variant's UPC code in the UPC field.

⇒ If the variant has a specific date when it becomes available, select the calendar icon for the START DATE to choose that date. Variants without start dates are assumed to be immediately available.

⇒ If the variant has a specific time on the start date when it becomes available, select the clock icon for the START TIME to choose that time, or enter the time directly in the text field.

⇒ If the variant has a specific date beyond which it is no longer available, select the calendar icon for the END DATE to choose that date. Variants without end dates are assumed to be always available and will need to be manually inactivated when they no longer are available.

⇒ If the variant has a specific time on the end date beyond which it is no longer available, select the clock icon for the END TIME to choose that time, or enter the time directly in the text field.

⇒ Enter a color name in the COLOR NAME text field if the variant is a color variant.

⇒ Enter a color code in the COLOR CODE text field if the variant has a color code.

⇒ Enter a size name in the SIZE NAME text field if the variant is a size variant.

⇒ Enter a size code in the SIZE CODE text field if the variant has a size code.

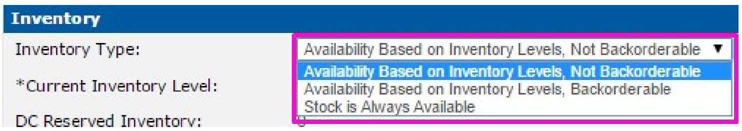
⇒ Enter a pricing group code in the PRICING GROUP CODE text field if the variant has a pricing group code.

⇒ Select the CAN BE TAXED check box if the variant can be taxed.

There are multiple options for how inventory of the variant can be handled. The INVENTORY TYPE field is used to select from those options.

- Option 1: Availability based on inventory levels and not backorderable.

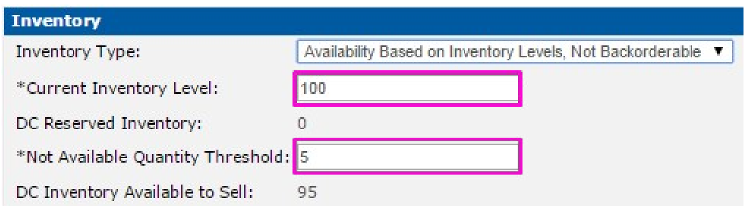
  ⇒ Select "Availability Based on Inventory Levels, Not Backorderable" as the INVENTORY TYPE.



The page will refresh and you will be able to set the inventory level of the variant.

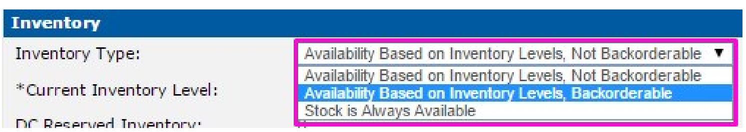
⇒ Enter the CURRENT INVENTORY LEVEL.

⇒ Enter the NOT AVAILABLE QUANTITY THRESHOLD. When inventory falls below this number, a "Not Available" message will be displayed for the variant and the variant will not be available for purchase.



- Option 2: Availability based on inventory levels and can be backordered.

  ⇒ Select "Availability Based on Inventory Level, Backorderable" as the INVENTORY TYPE.



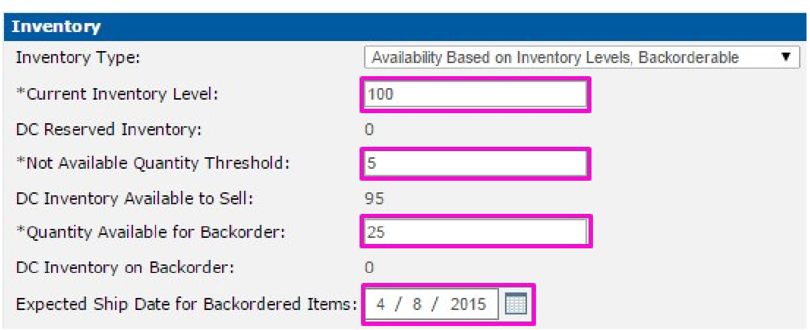
The page will refresh and you will be able to set the inventory level for the variant.

⇒ Enter the CURRENT INVENTORY LEVEL.

⇒ Enter the NOT AVAILABLE QUANTITY THRESHOLD. When inventory falls below this number, a "Not Available" message will be displayed for the variant and the variant will not be available for purchase.

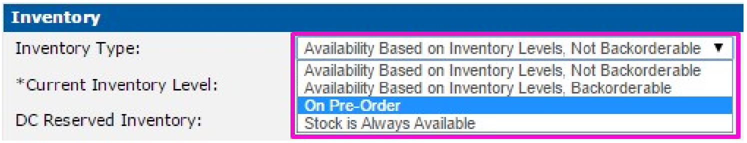
⇒ Enter the QUANTITY AVAILABLE FOR BACKORDER (the maximum quantity that can be backordered).

⇒ Enter the EXPECTED SHIP DATE FOR BACKORDERED ITEMS, or use the calendar icon to select the date.



- Option 3: Available only for pre-order.

  ⇒ Select "On Pre-Order" as the INVENTORY TYPE.



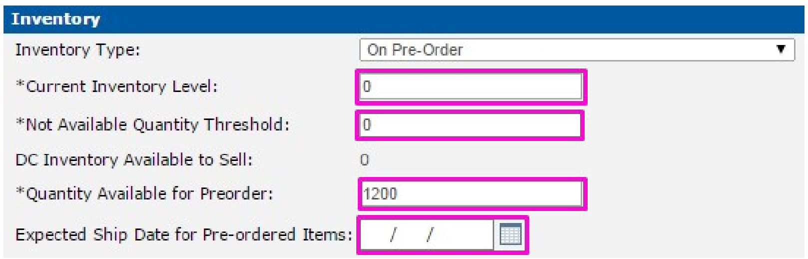
The page will refresh and you will be able to set the pre-order values for the variant.

⇨ Enter the CURRENT INVENTORY LEVEL.

⇨ Enter the NOT AVAILABLE QUANTITY THRESHOLD. When inventory falls below this number, a "Not Available" message will be displayed for the variant and the variant will not be available for pre-order purchase.

⇨ Enter the QUANTITY AVAILABLE FOR PREORDER (the maximum number that can be placed on pre-order).

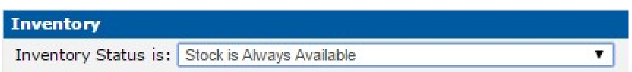
⇨ Enter the EXPECTED SHIP DATE FOR PRE-ORDERED ITEMS, or use the calendar icon to select the date.



- Option 4: Always available.

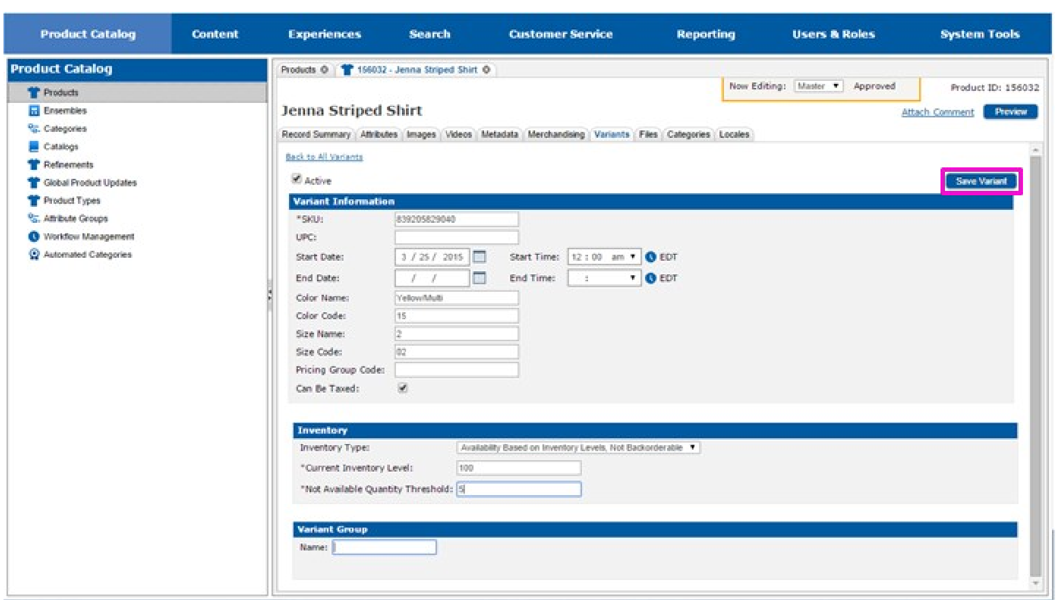
⇨ Select "Stock is Always Available" as the INVENTORY TYPE.

The page will refresh. There is no additional inventory information that needs to be entered for a variant with this inventory type.

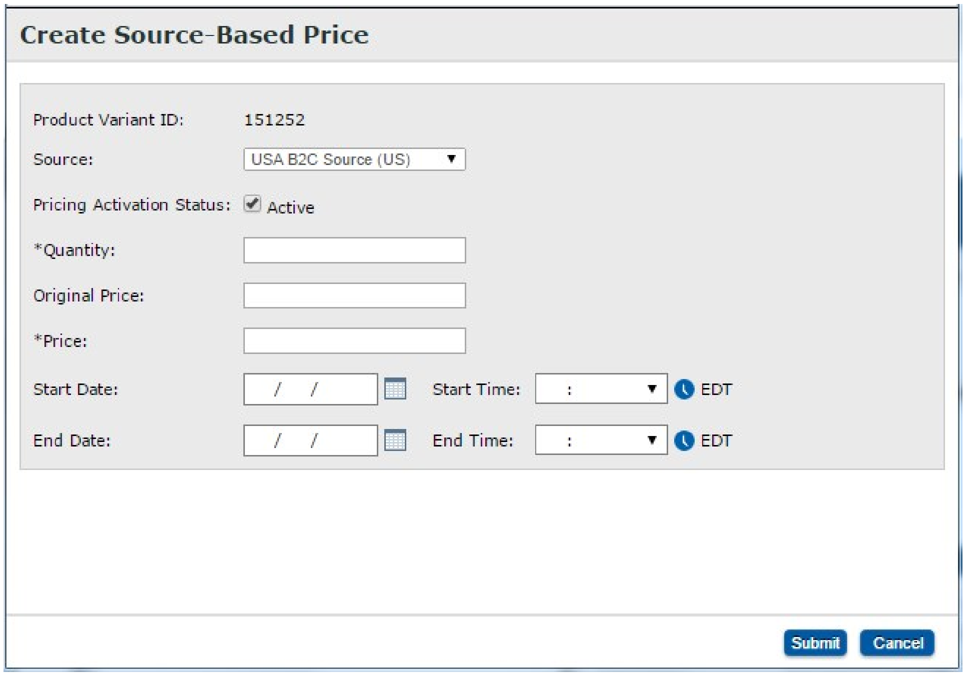


⇨ If the variant belongs to a variant group, enter the name of the group in the NAME text field. Product variant groups can be used in Experience Management for experiences that take into consideration the product variant(s) a visitor to the website interacts with.

⇨ Select SAVE VARIANT when all of the variant information has been entered.



A pop-up window will appear where you will set the pricing for the variant.



⇨ Select a SOURCE for this price. Prices may vary based on the source they are associated with.

⇨ Select the ACTIVE checkbox activate the pricing source. Inactive pricing sources will not be used on the website.

⇨ Enter a QUANTITY for this price. This indicates the amount of the variant that can be sold at this price.

⇨ Enter the ORIGINAL PRICE for the source. The original price is compared to the price to determine if the variant is being discounted.

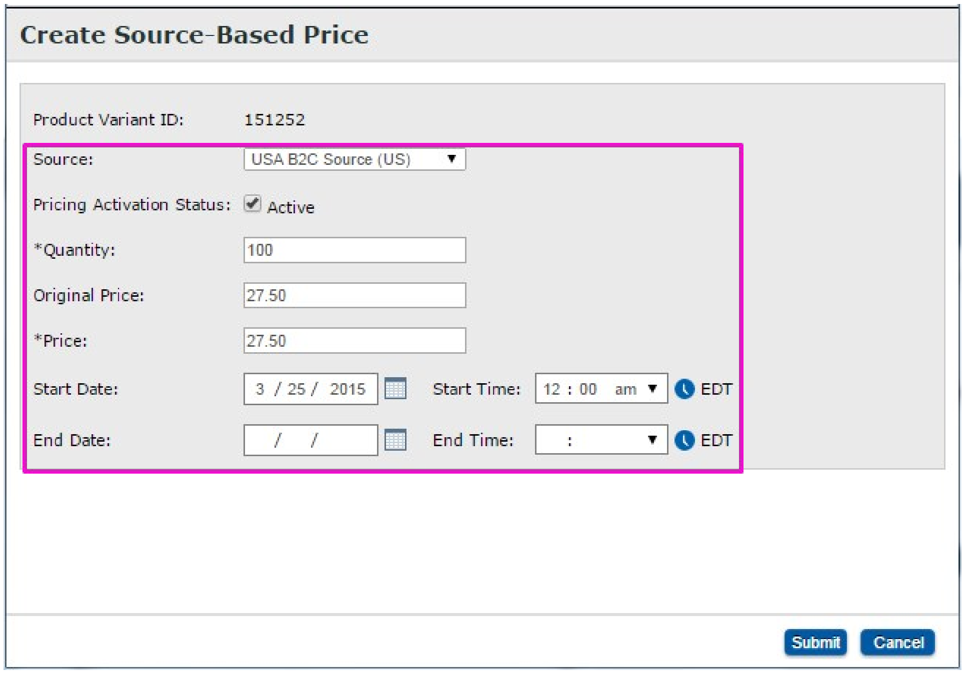
⇨ Enter the current PRICE for the variant. This is the current purchase price of the variant.

⇨ Enter a START DATE for the price to become valid for the variant. Prior to this date, the price will not be available. If no date is entered, the price is immediately available.

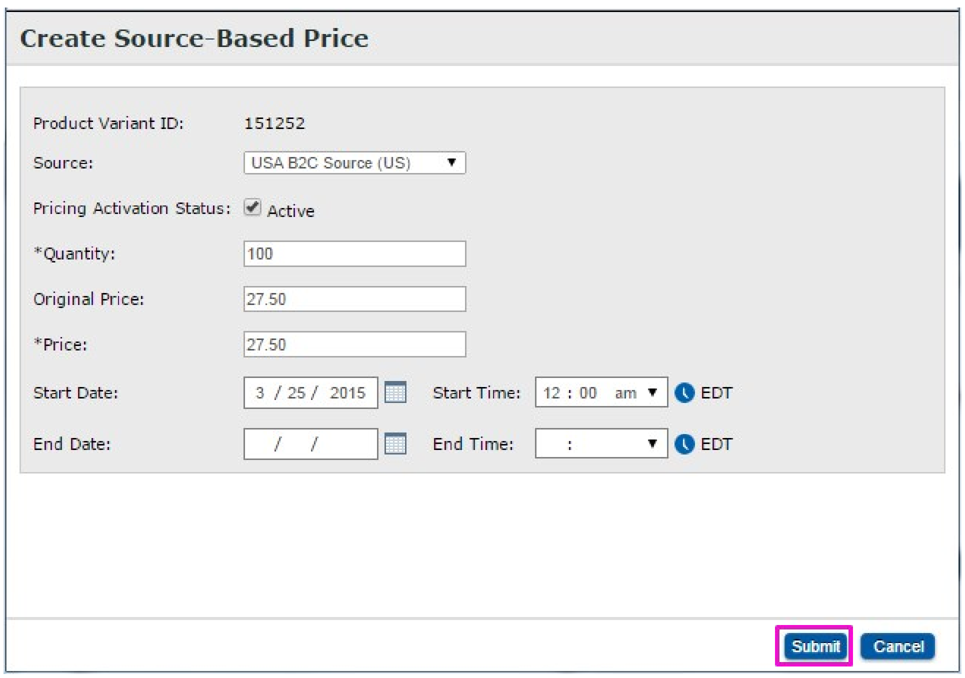
⇨ Enter a START TIME on the start date when the price will become available for the product. Prior to the start time on the start, the price will not ve available. If not time is entered, the price will be available at midnight on the start date.

⇨ Enter an END DATE after which the price is no longer valid for the variant. If no date is entered, the price will be available until it is explicitly deactivated.

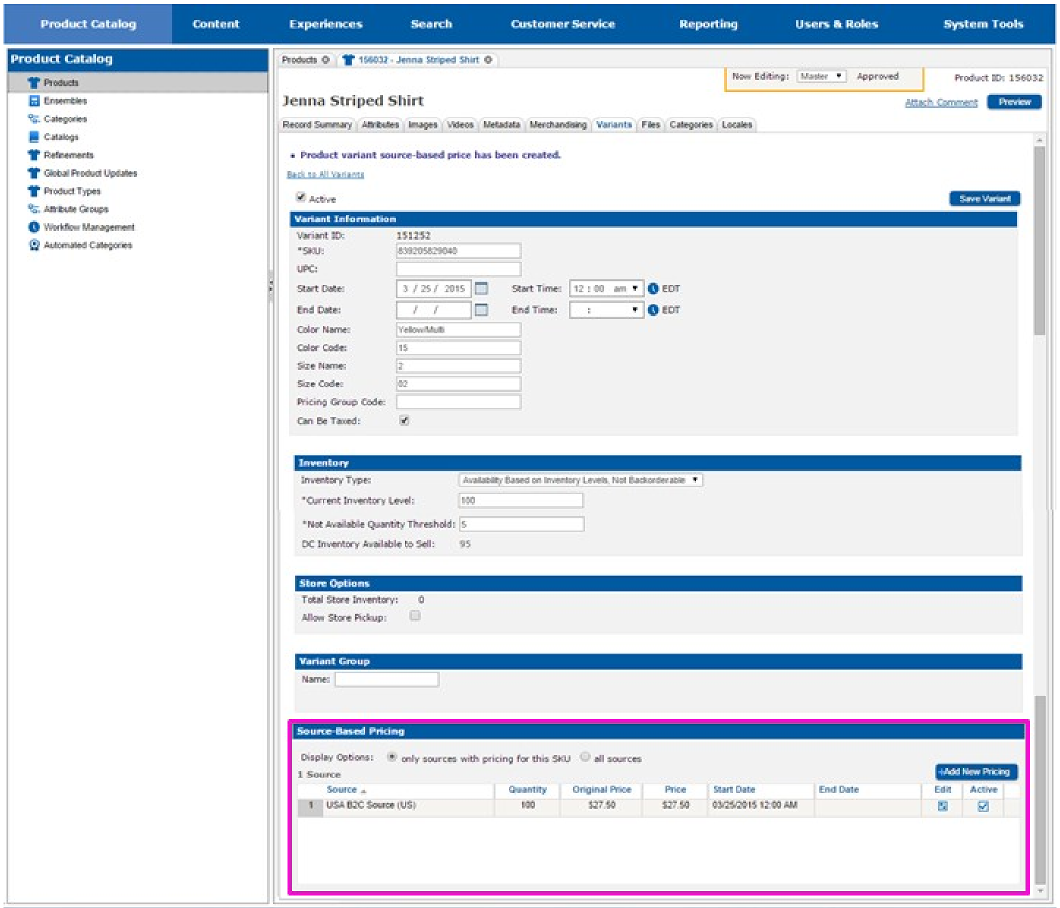
⇨ Enter an END TIME on the end date after which the price is no longer valid for the variant. If no end time is entered but an end date is entered, the price will not be valid after 11:59PM on the end date.



⇒ Select SUBMIT to save your changes.

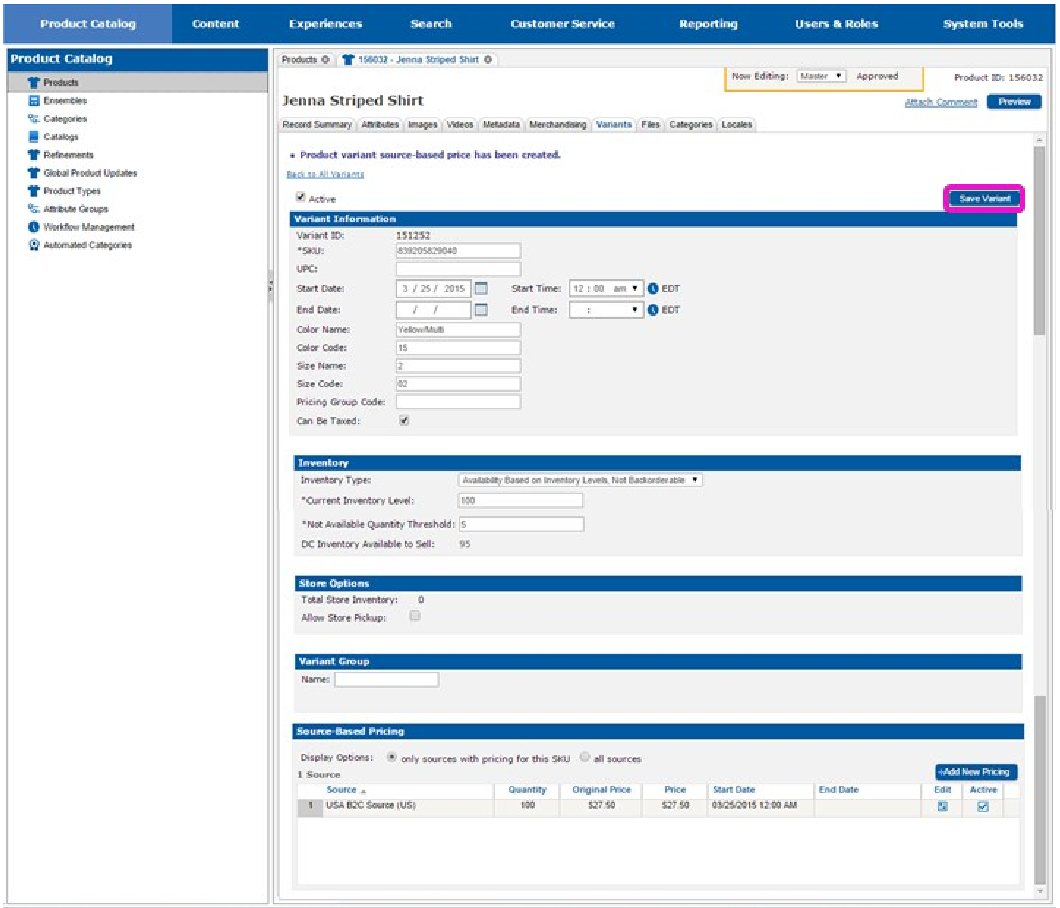


The pop-up window will dismiss and you will be returned to the main Site Manager screen. You will see a new section added to the bottom of the page with the information you entered in the pricing pop-up.



⇨ Select ADD NEW PRICING if additional pricing sources need to be created for the variant. Repeat the steps above for each pricing source.

⇨ Select SAVE VARIANT to save the variant.

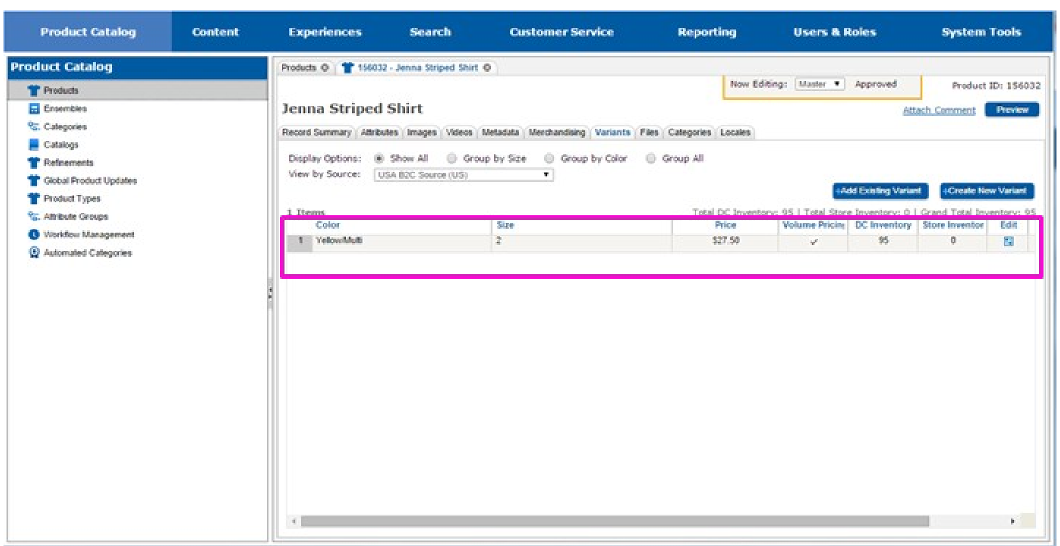


⇒ Repeat the steps in this section to add additional variants to the product.

When you are done adding variants, you need to return to the main variant page.

⇒ Select BACK TO ALL VARIANTS.

The page will redraw and you will see the main variant page. You will see the variant(s) you added in the list of variants.



See also

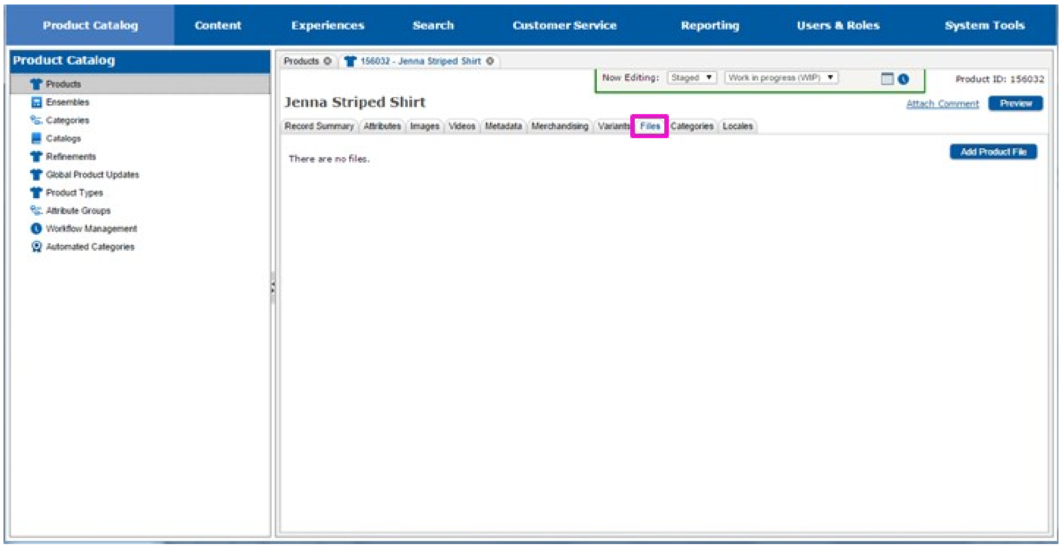
Before You Begin
The Example Used

Home > Tutorials > Creating New Products > Assigning Files

Assigning Files

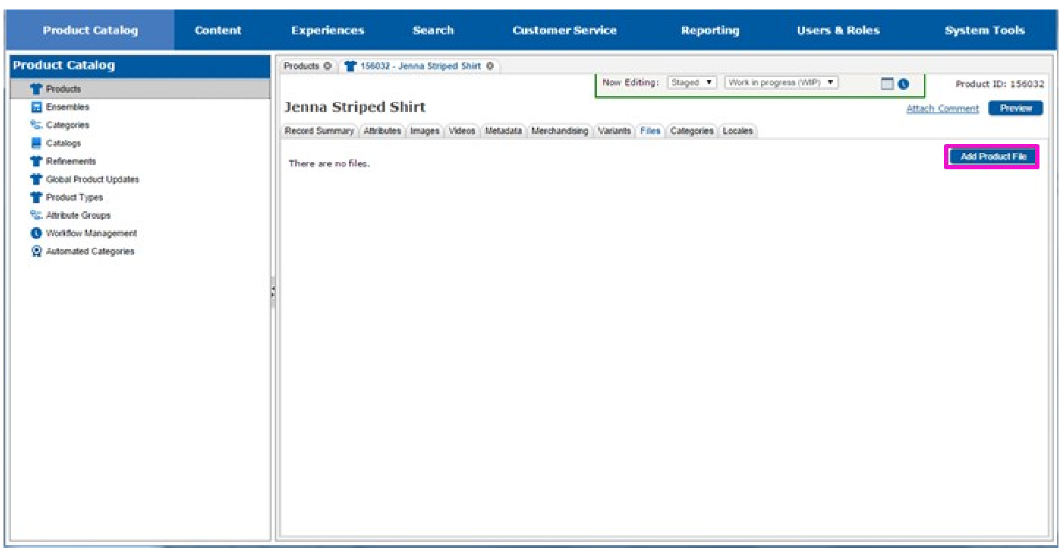
You can attach files to your product if you have product information that is too big to be displayed on the product's page on the website. Instruction booklets, diagrams, and detailed warranty information are common items that are attached by file. Files are added to a product with the FILES tab.

⇒ Select the FILES tab.

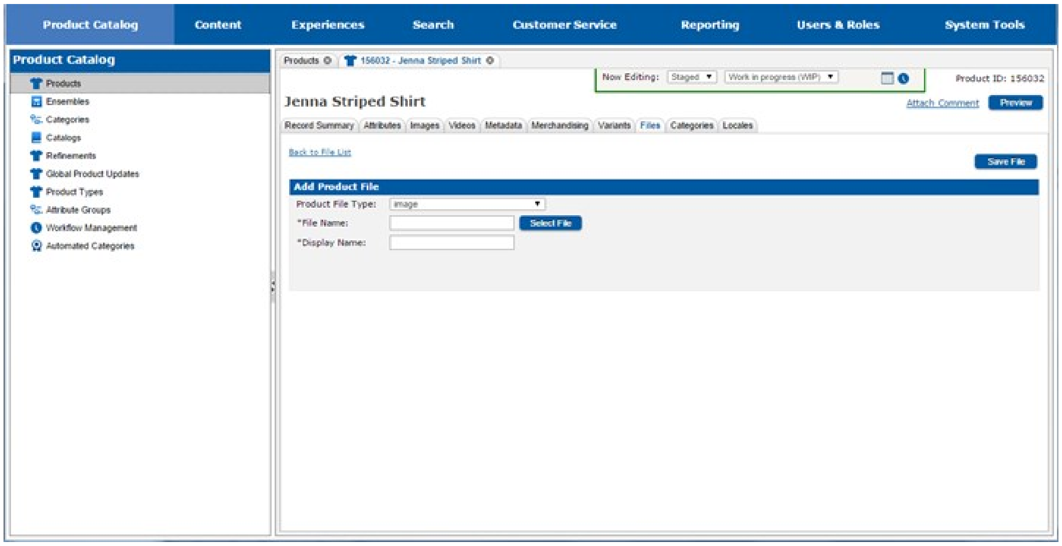


The page will redraw and you will see the page for attaching a file to the product.

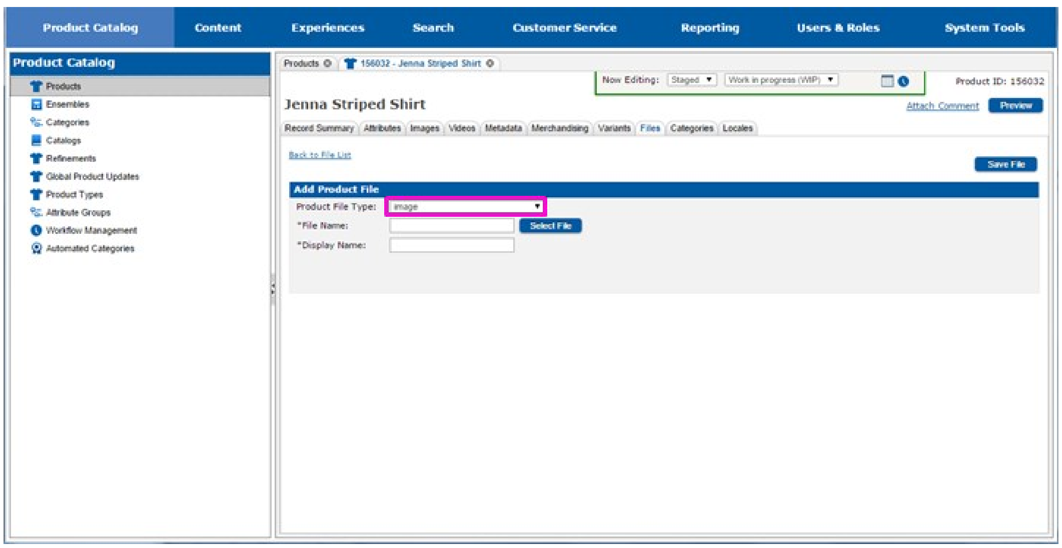
⇒ Select ADD PRODUCT FILE.



The page will redraw and you will see the fields for adding a file.

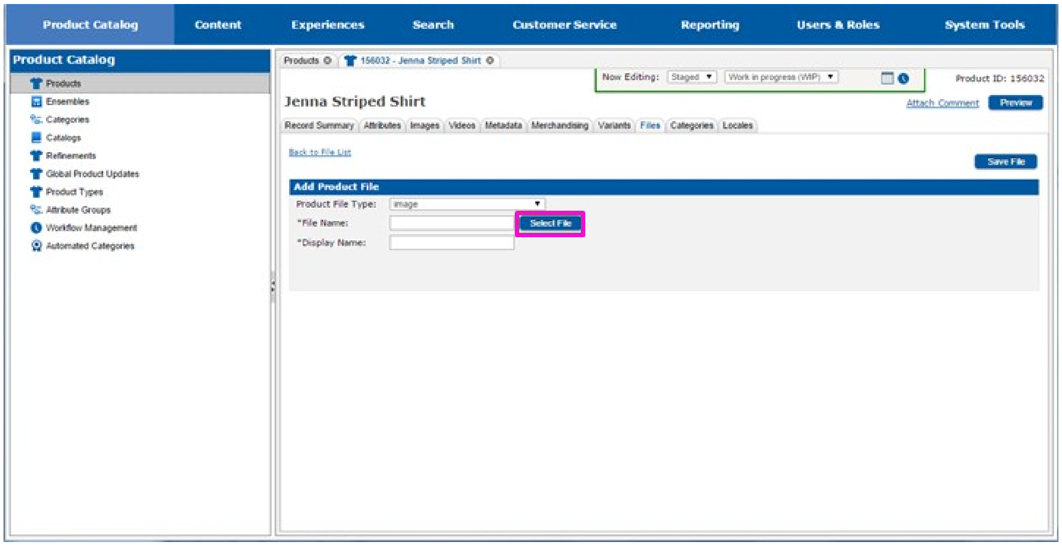


⇨ Select the type of file you will be adding in the PRODUCT FILE TYPE drop-down list.

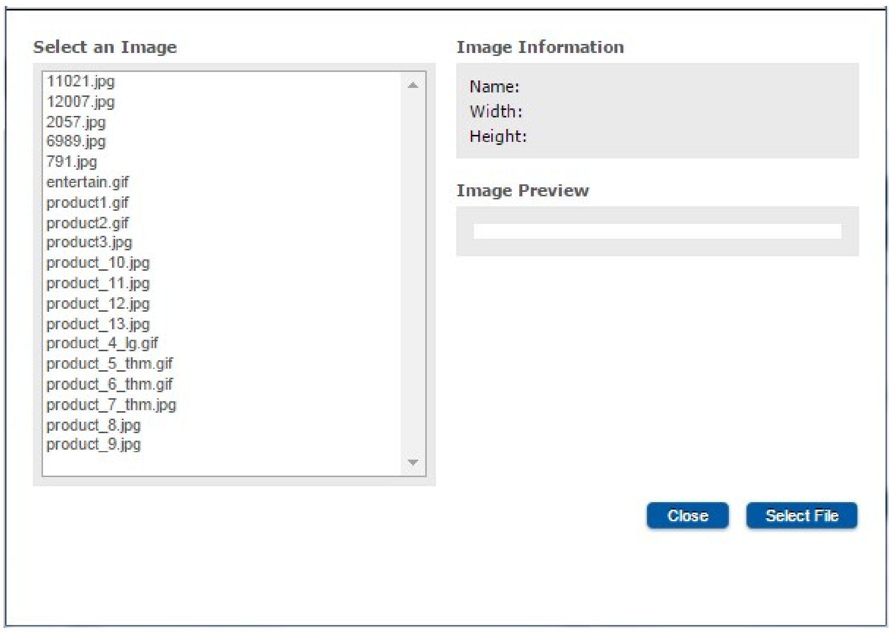


If you know the name of the file you are attaching, you can enter it in the FILE NAME text field. You can also view all of the available files and select the one you want. For our example, we will view all the available files.

⇨ Select SELECT FILE.

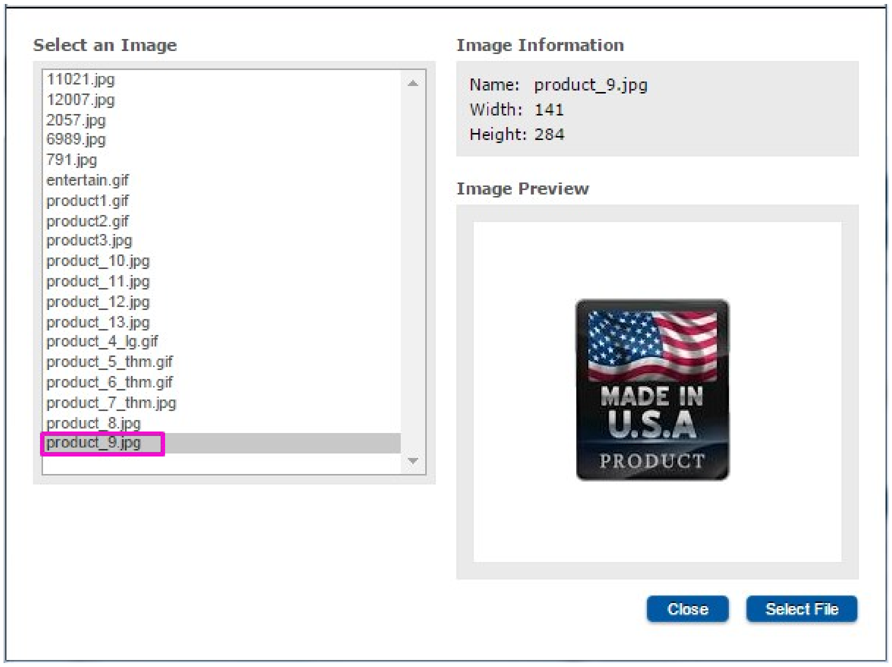


A file selection window will appear.

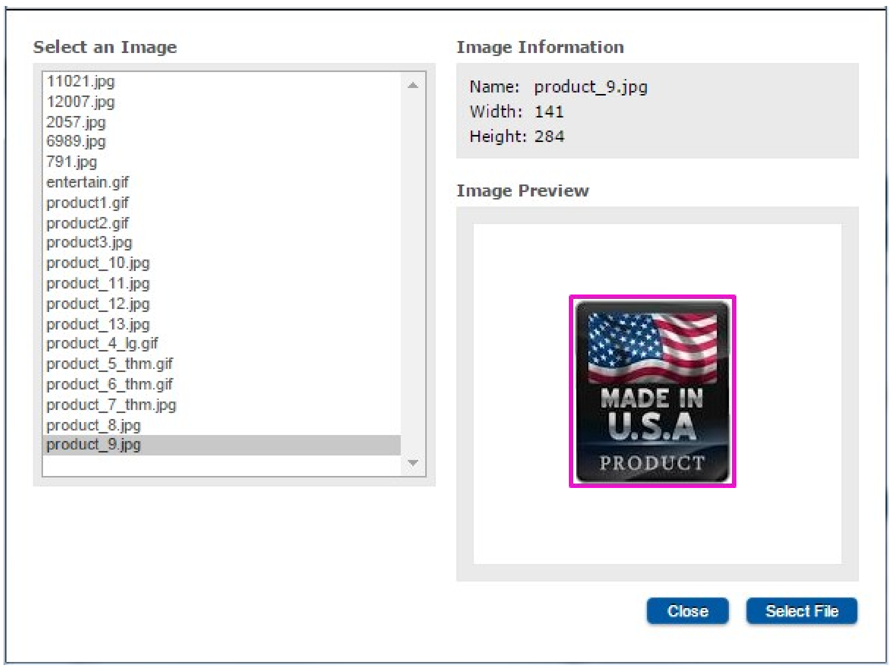


The file selection window is used to select the file that will be attached to the product. A list of all of the files that are available for the chosen file type will be displayed.

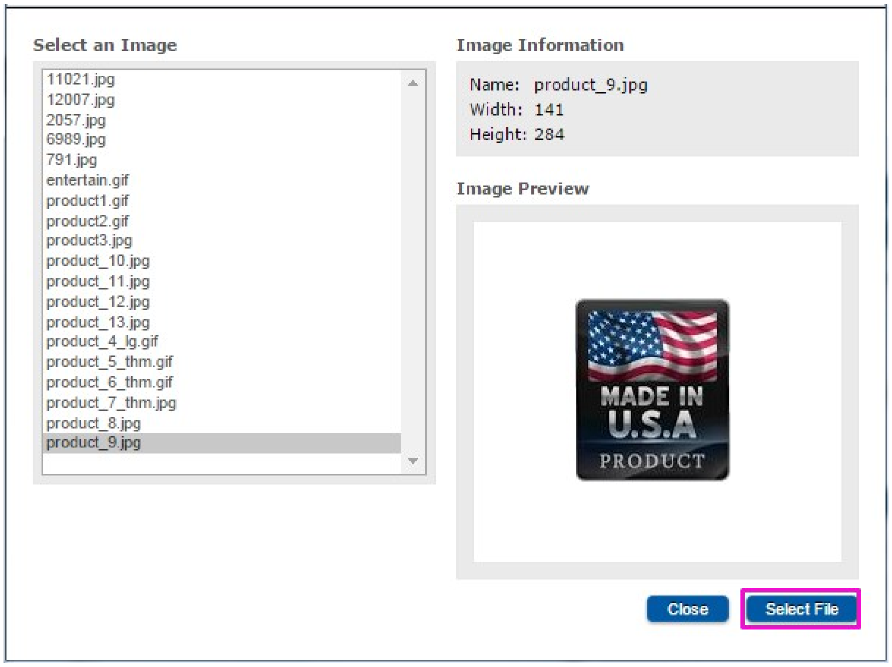
⇒ Select the file from the list that you want to attach to the product.



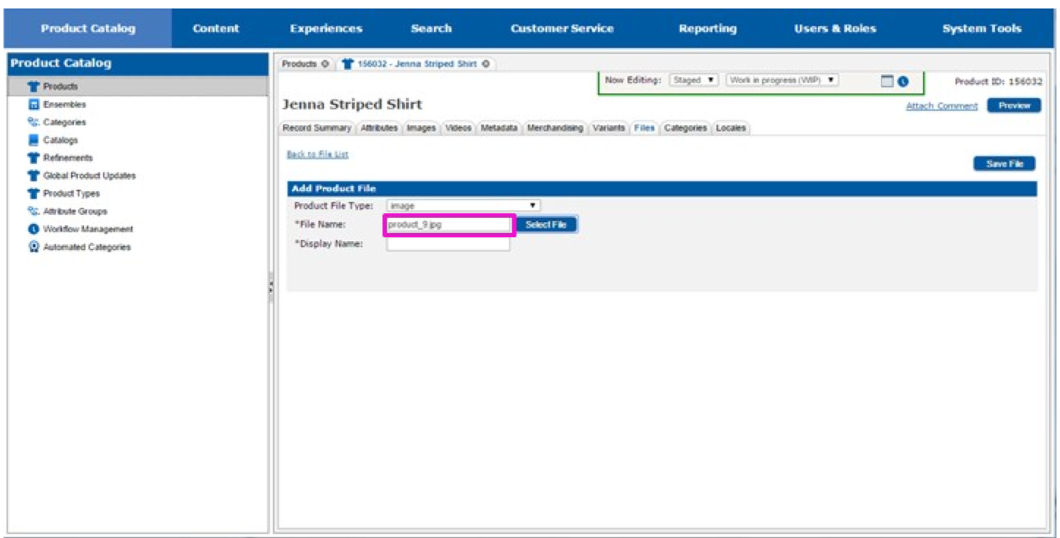
If the file is an image file, a preview of the image will be displayed in IMAGE PREVIEW area and details of the file will be displayed in the IMAGE INFORMATION area. If the file is not an image, you may see a message indicating how you can preview the file.



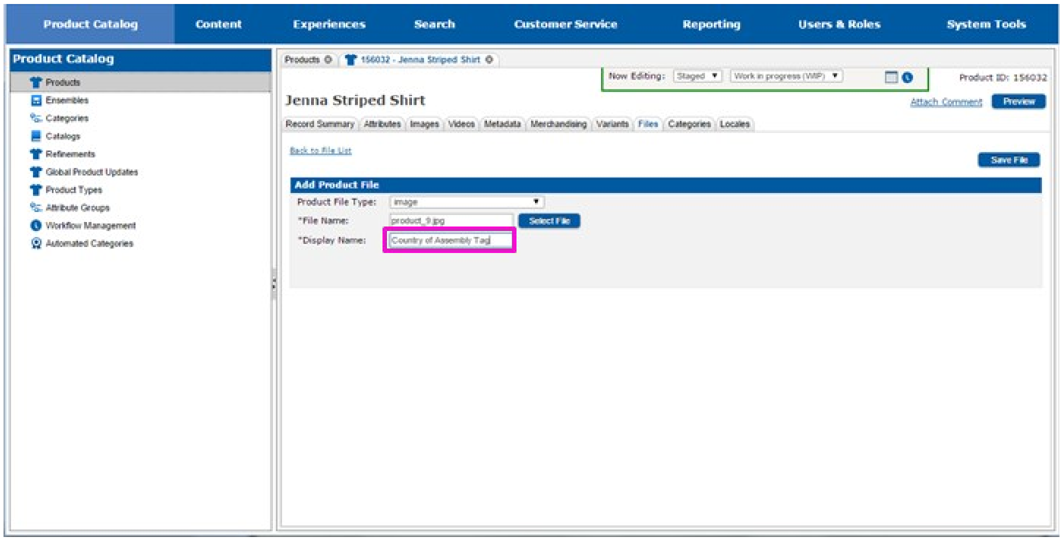
⇒ Select SELECT FILE to select the file.



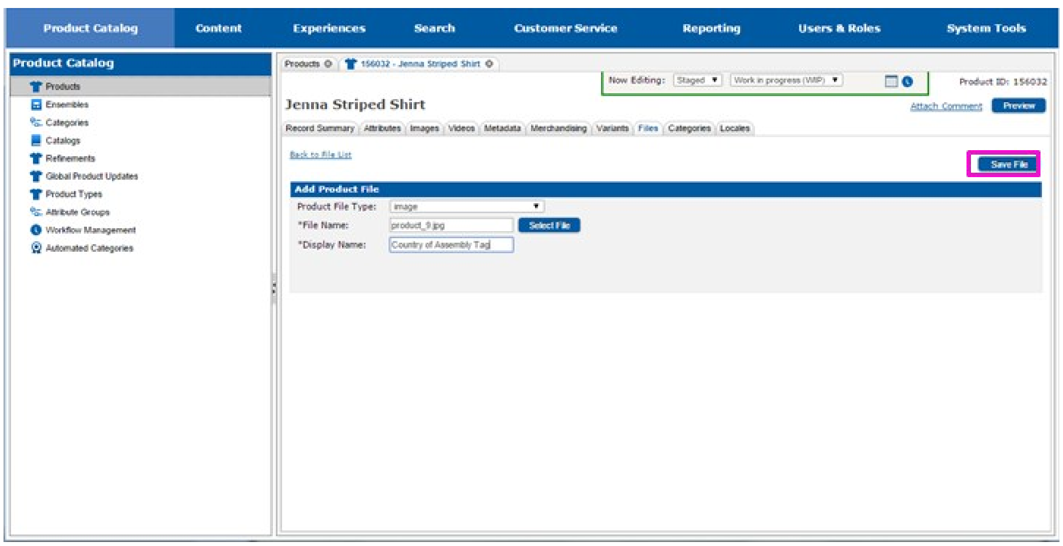
The file selection window will close and you will see the name of the file in the FILE NAME text area.



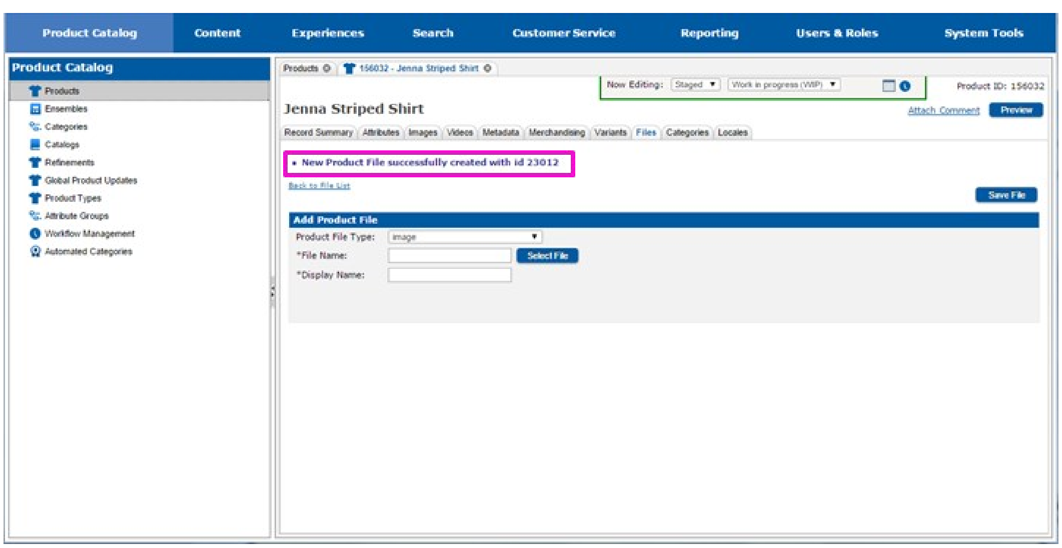
⇨ Enter the name that should be used to reference the file on the product's page on the website in the DISPLAY NAME text field.



⇒ Select SAVE FILE.

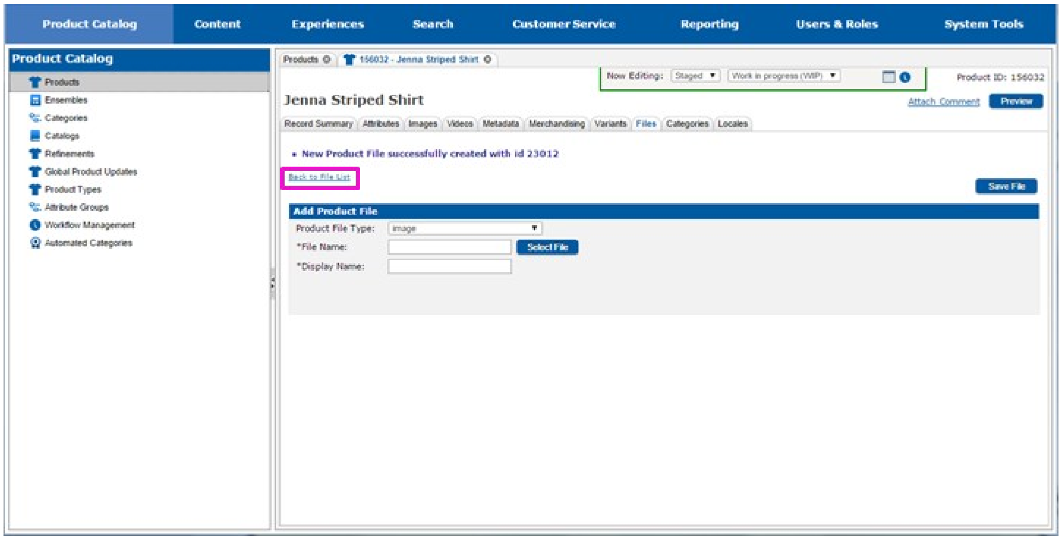


The page will redraw and you will see a message indicating that the file has been saved with the product.

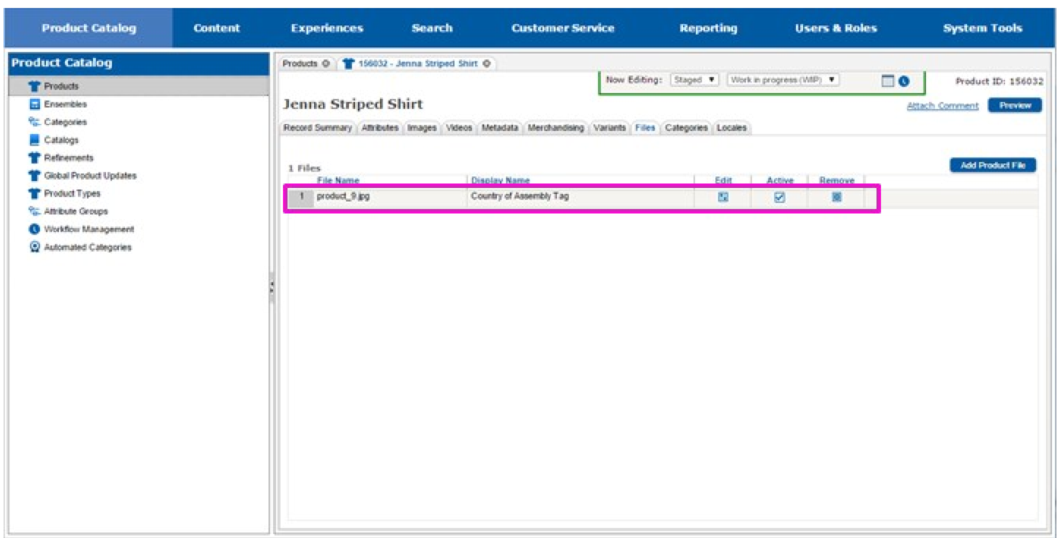


⇒ Repeat the steps in this section to add additional files to the product.

⇒ Select BACK TO FILE LIST.



The page will redraw and you will see the main file tab. You will see the file(s) you added in the list of files associated with the product.



See also

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Optional - Assigning the Product to a Category
Optional - Customizing for Locales
Optional - Previewing the Product

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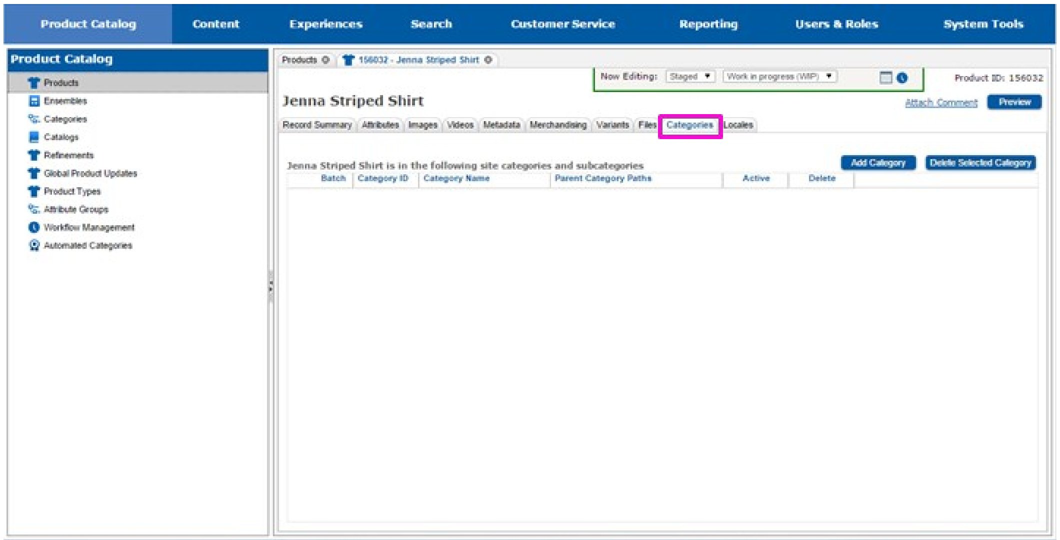
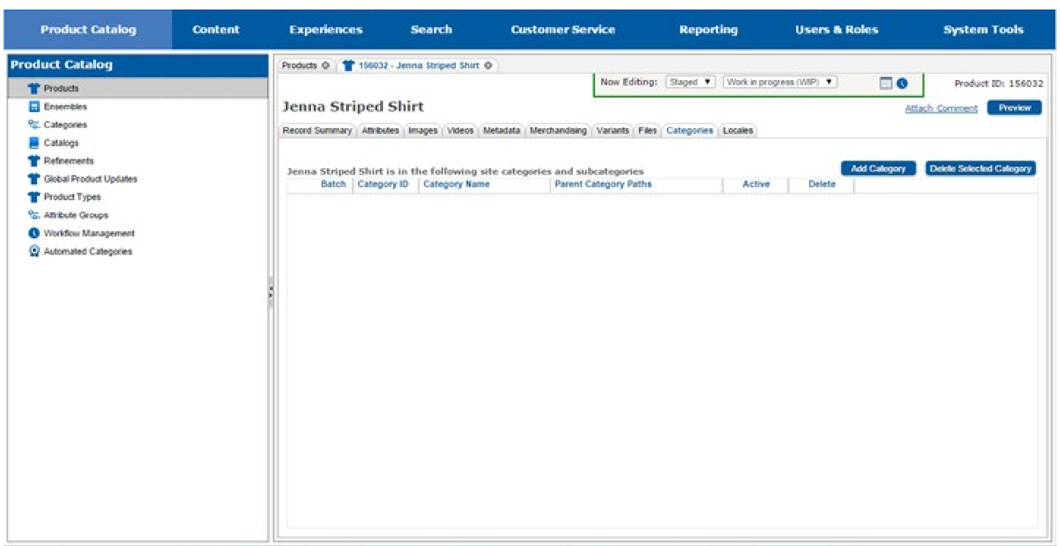
Optional - Assigning the Product to a Category

If the category or categories the new product will appear in are known, the product may be assigned to them through the CATEGORIES tab. If the category or categories is not currently known, this section may be skipped and returned to at a later time.

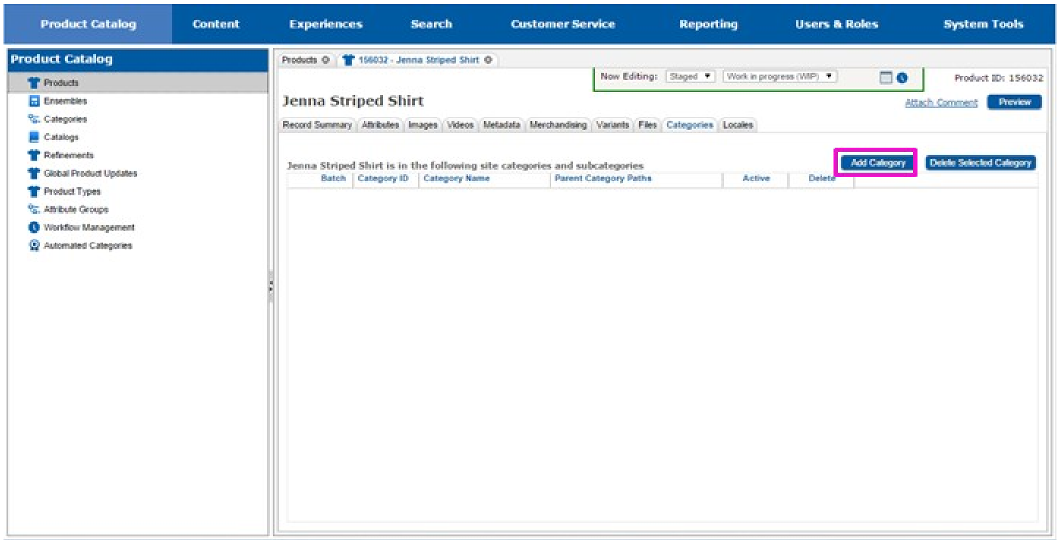
⇒ Select CATEGORIES.



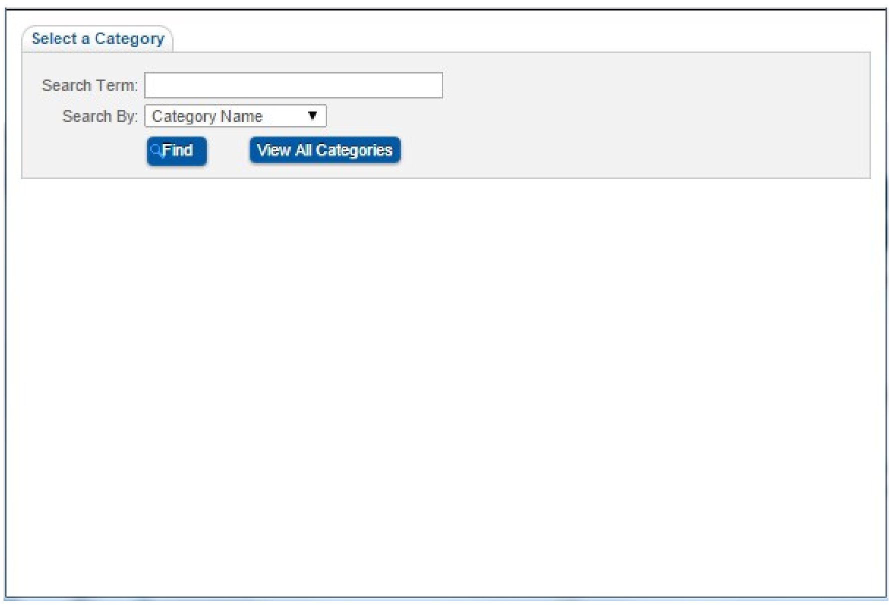
The page will redraw and you will see the page for assigning products to categories.



⇒ Select ADD CATEGORY.

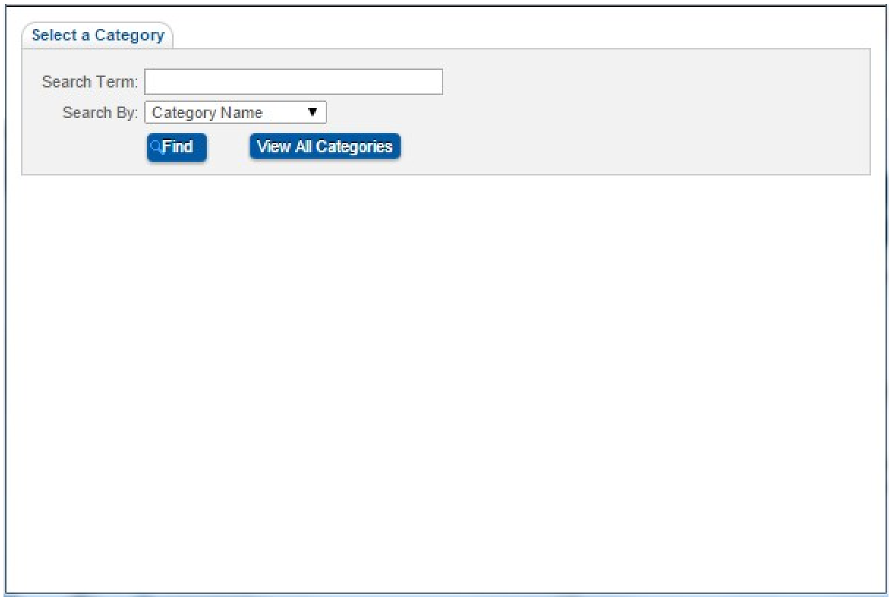


A SELECT A CATEGORY window will appear. You will use this window to select the category or categories the product should appear in.



There are two ways to locate a category in this window. If you want to view all the categories:

⇨ Select VIEW ALL CATEGORIES to view all the available categories.



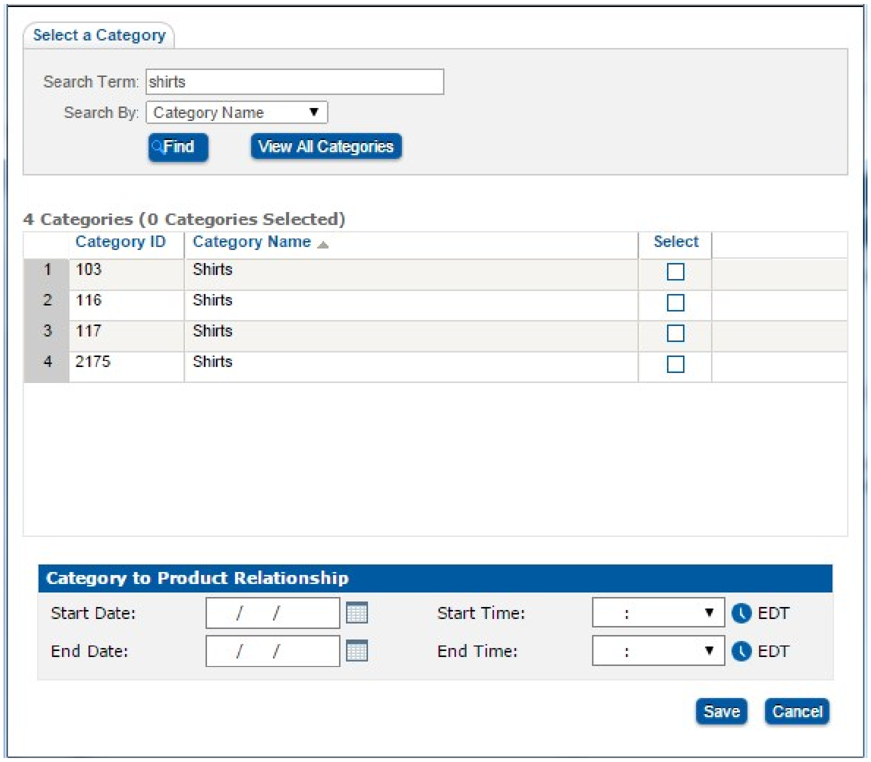
If you want to search for a particular category:

⇨ Enter a search term in the SEARCH TERM field.

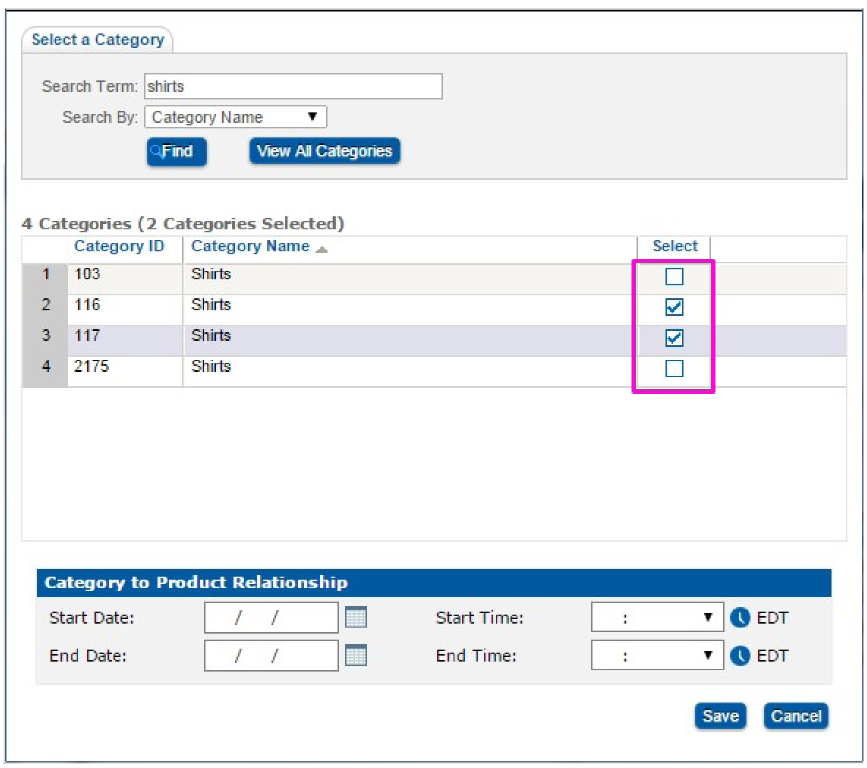
⇨ Select a field to search against in the SEARCH BY field.

⇨ Select FIND.

The lower portion of the page will redraw and will display the categories you asked for.



⇒ Select the SELECT checkboxes to the right of the categories you wish to add the product to.

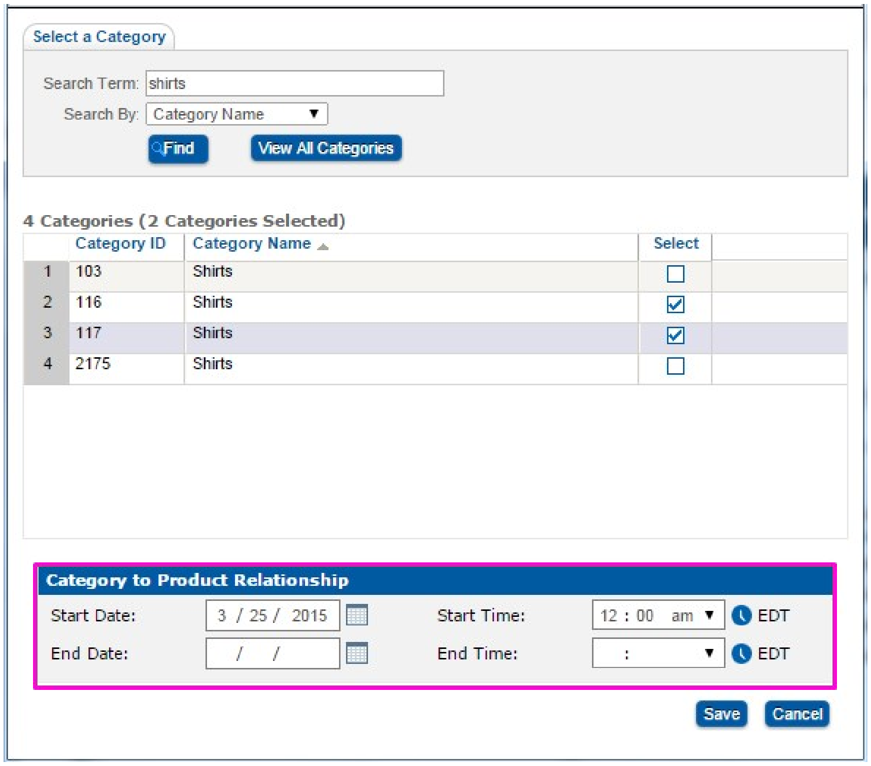


⇒ Enter a START DATE when the product will become available in the category. If no start date is entered, the product is immediately available in the category.

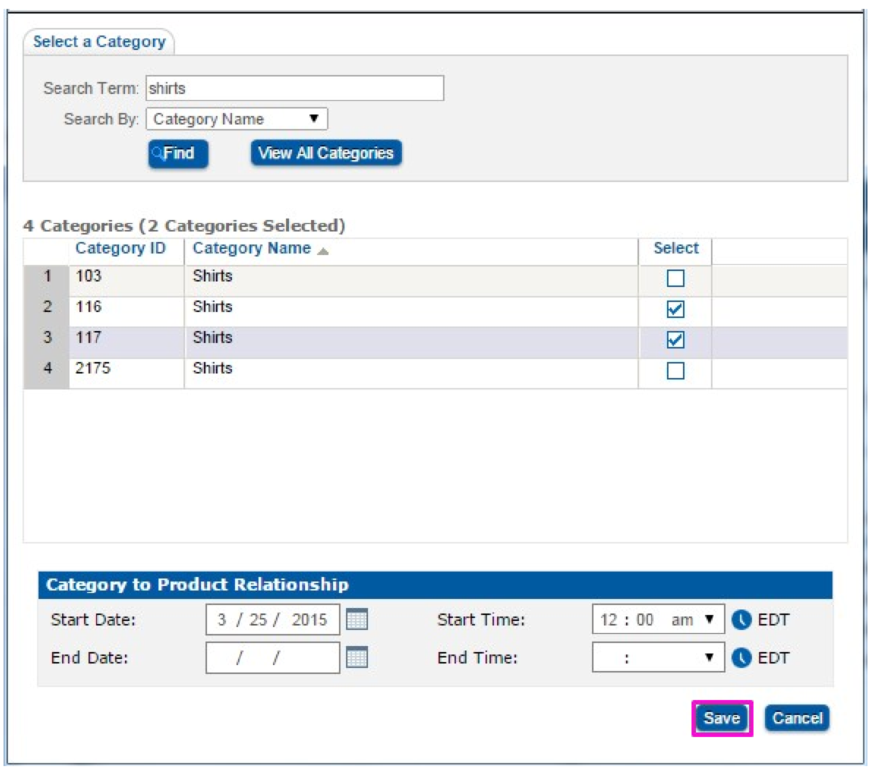
⇒ Enter a START TIME on the start day when the product will be available in the category. If no time is entered, the product becomes available at midnight on the start day.

⇒ Enter an END DATE after which the product is no longer available in the category. If no end date is entered, the product will be available in the category until manually removed.

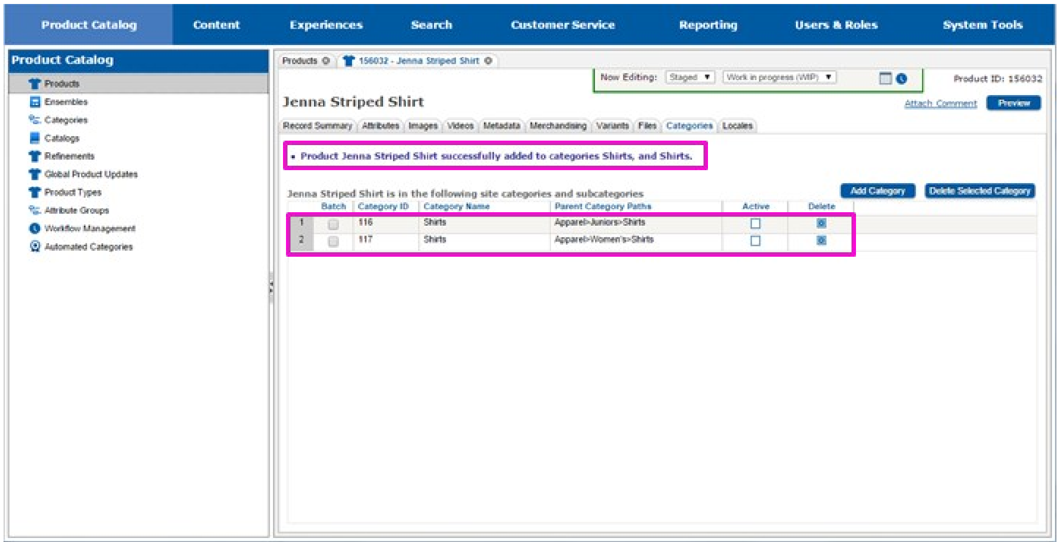
⇨ Enter an END TIME con the end date after which the product will no longer be available in the category. If no end time is entered, the product will no longer be available in the category after 11:59 pm on the end date.



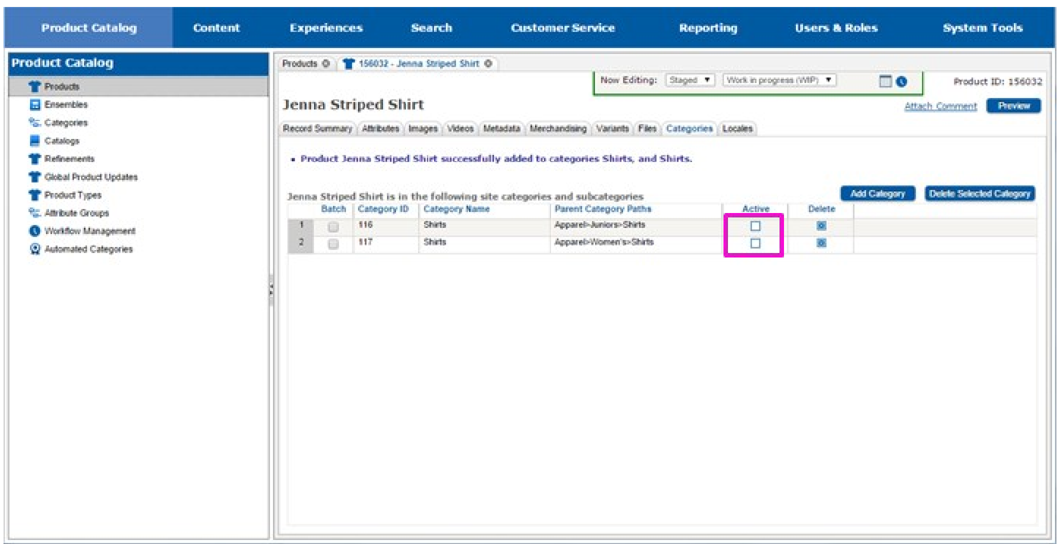
⇨ Select SAVE to save your changes.



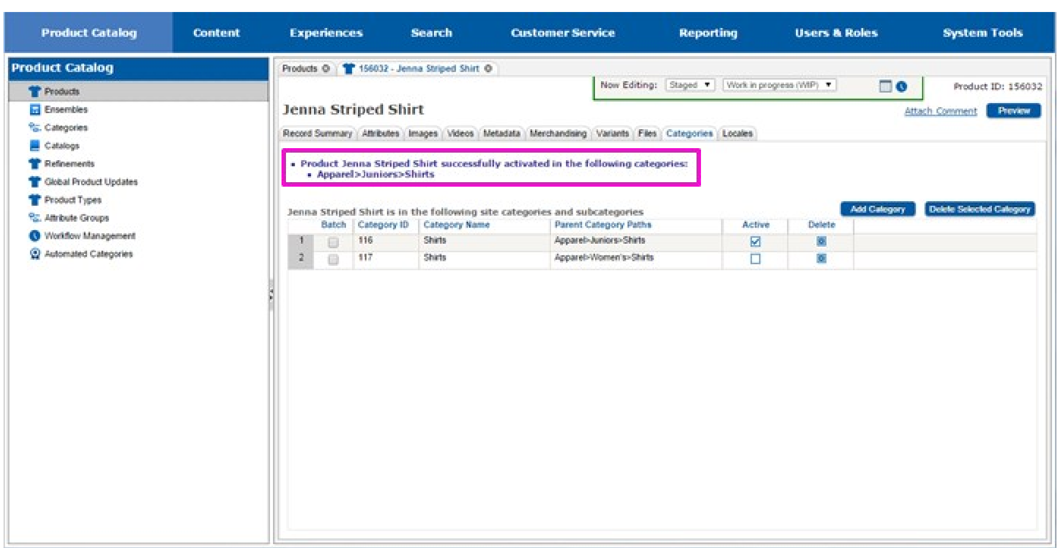
The pop-window will close and you will be returned to the main page on the Site Manager. You will see a message indicating the product has been added to the category you selected, and the category will be added to the list of categories the product is in.



⇒ Select the ACTIVE checkbox for any category that you want the product to be immediately active in.



A message will appear for each category indicating the relationship is now active.



See also

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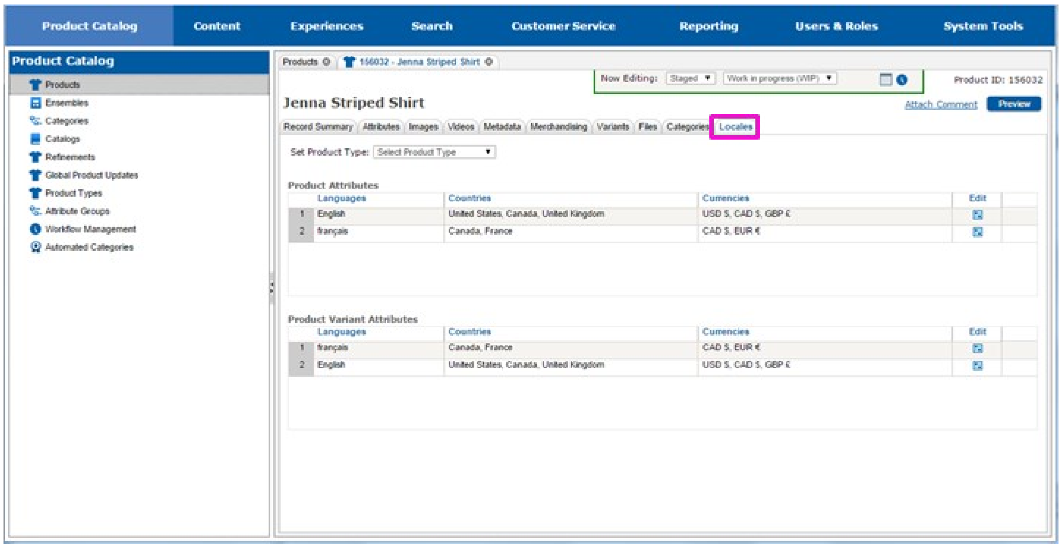
Optional - Customizing for Locales

If your site is an international site and supports multiple locales, you can customize the product for your locales. This functionality is available only for international sites.

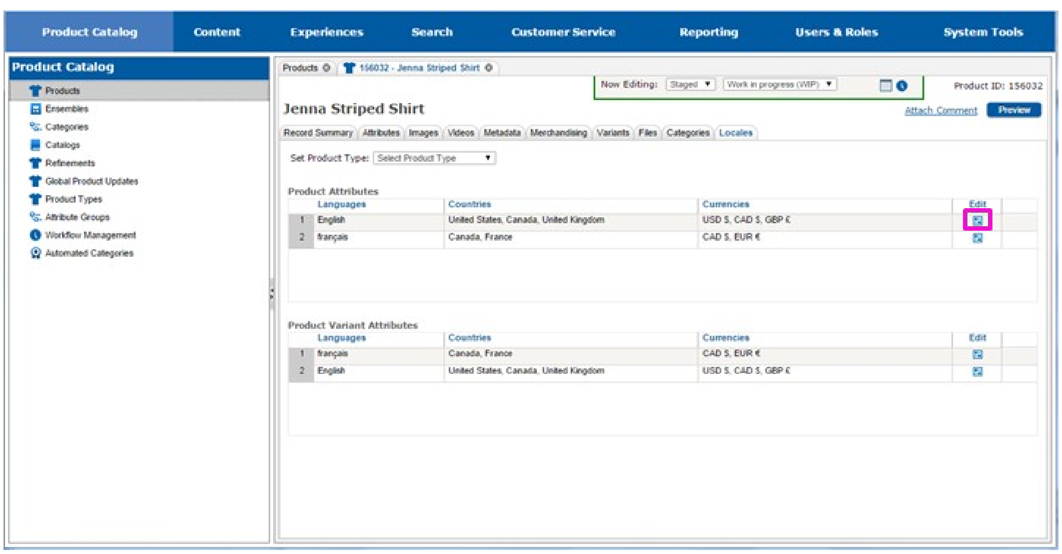
⇒ Select LOCALES.

The page will redraw and you will see the page for assigning customizing products for locales.

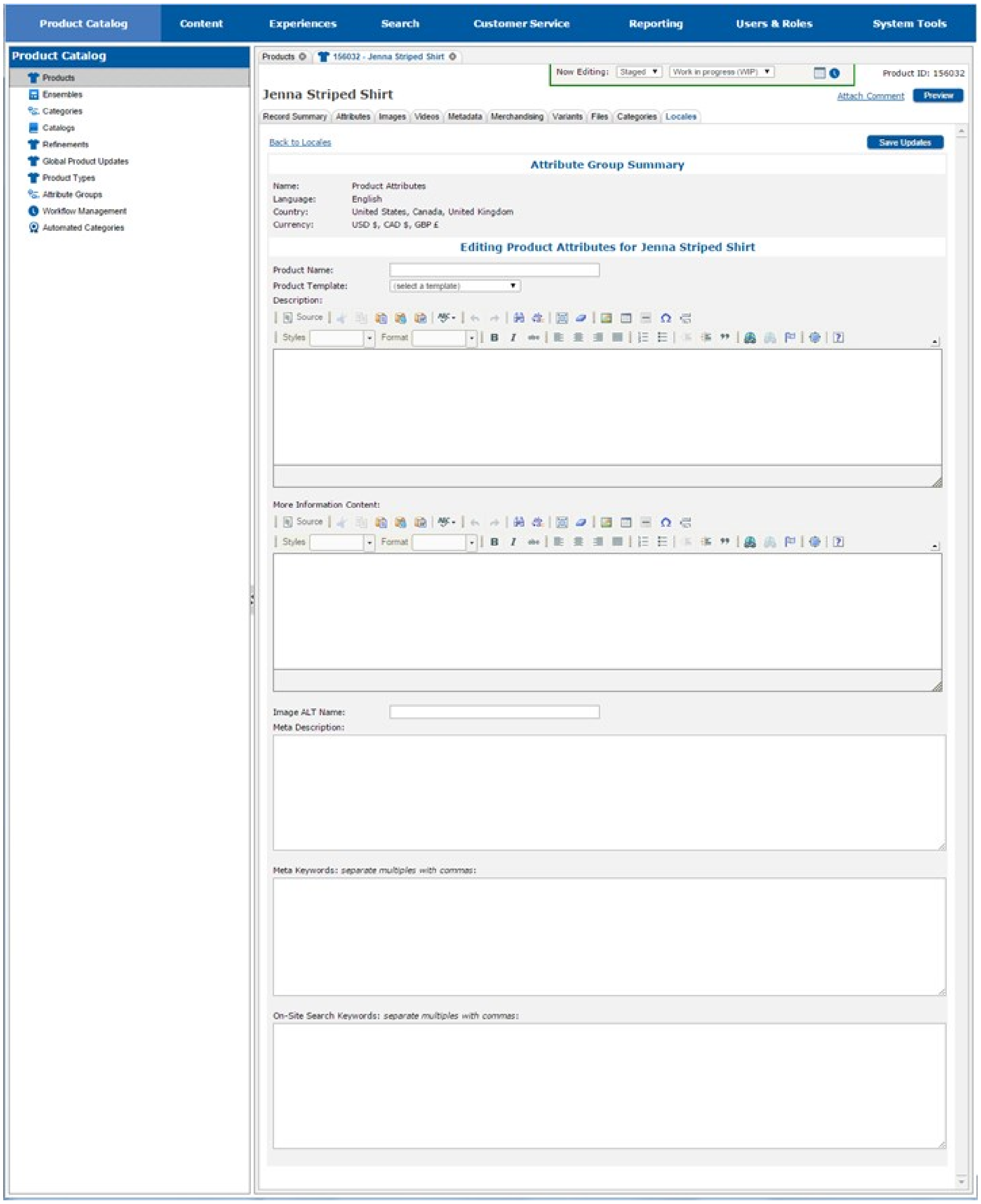


There are three things that can be customized by locale for a product: product attributes, product variant attributes, and dynamic attributes. Customizations are done by determining the category of changes you want to make, and then selecting the locale(s) in the appropriate list for the category. We will first make product attribute changes.

⇒ Select the EDIT icon to the right of the locale in the PRODUCT ATTRIBUTES list that you wish to make modifications for.



The page will redraw and you will see the product attributes that can be customized for the locale.



⇨ Enter a localized name for the PRODUCT NAME.

⇨ Select a PRODUCT TEMPLATE to be used as the product page on the web site.

⇨ Enter a localized DESCRIPTION for the product.

⇨ Enter localized text for MORE INFORMATION CONTENT.

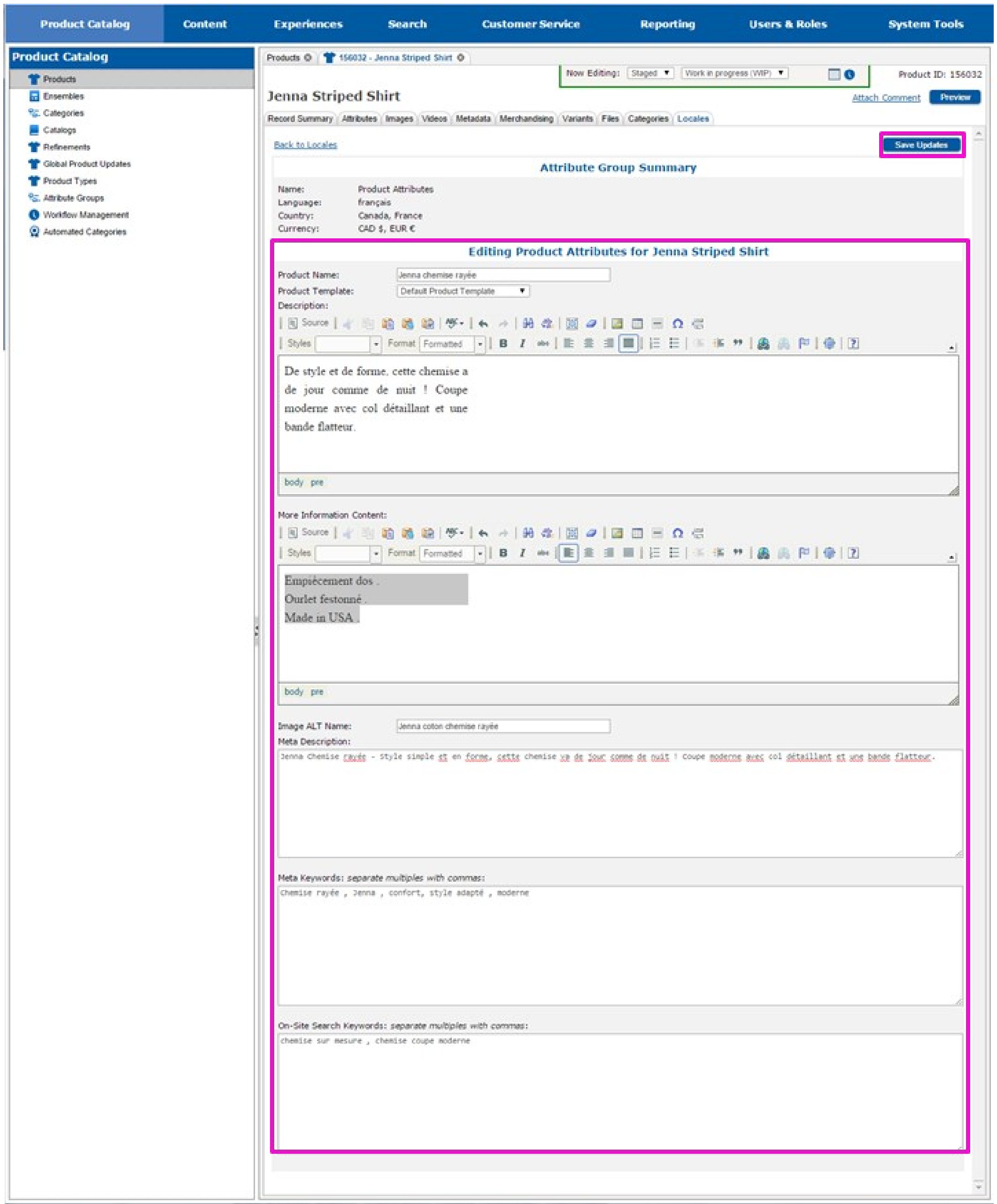
⇨ Enter localized text for the IMAGE ALT NAME. This is the text that appears if the product image is unavailable.

⇨ Enter a localized META DESCRIPTION. This is the description that is made available to external search engines.

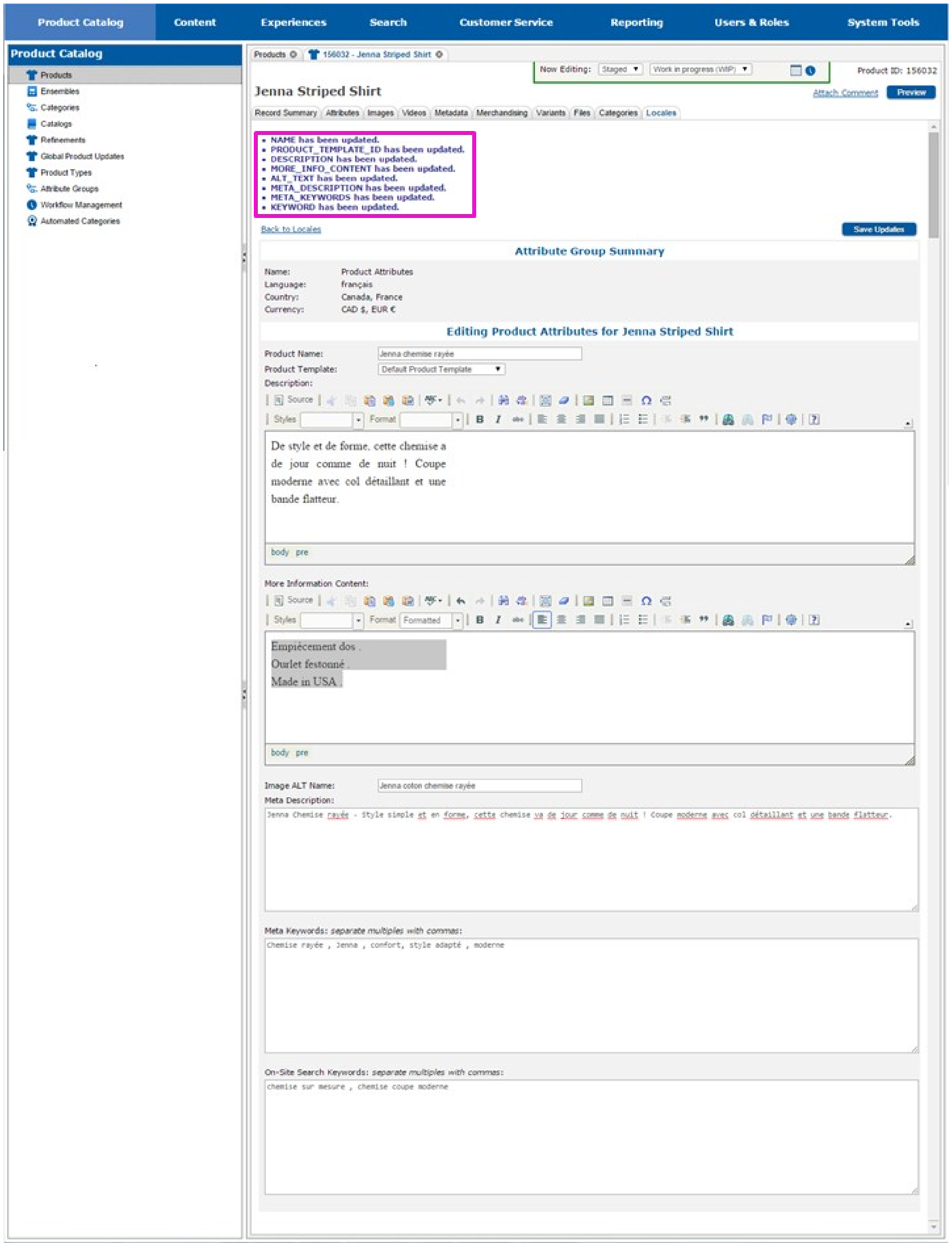
⇨ Enter a localized list of META KEYWORDS. These keywords are made available to external search engines.

⇨ Enter a localized list of ON-SITE SEARCH KEYWORDS. These keywords are used for searches performed on the site.

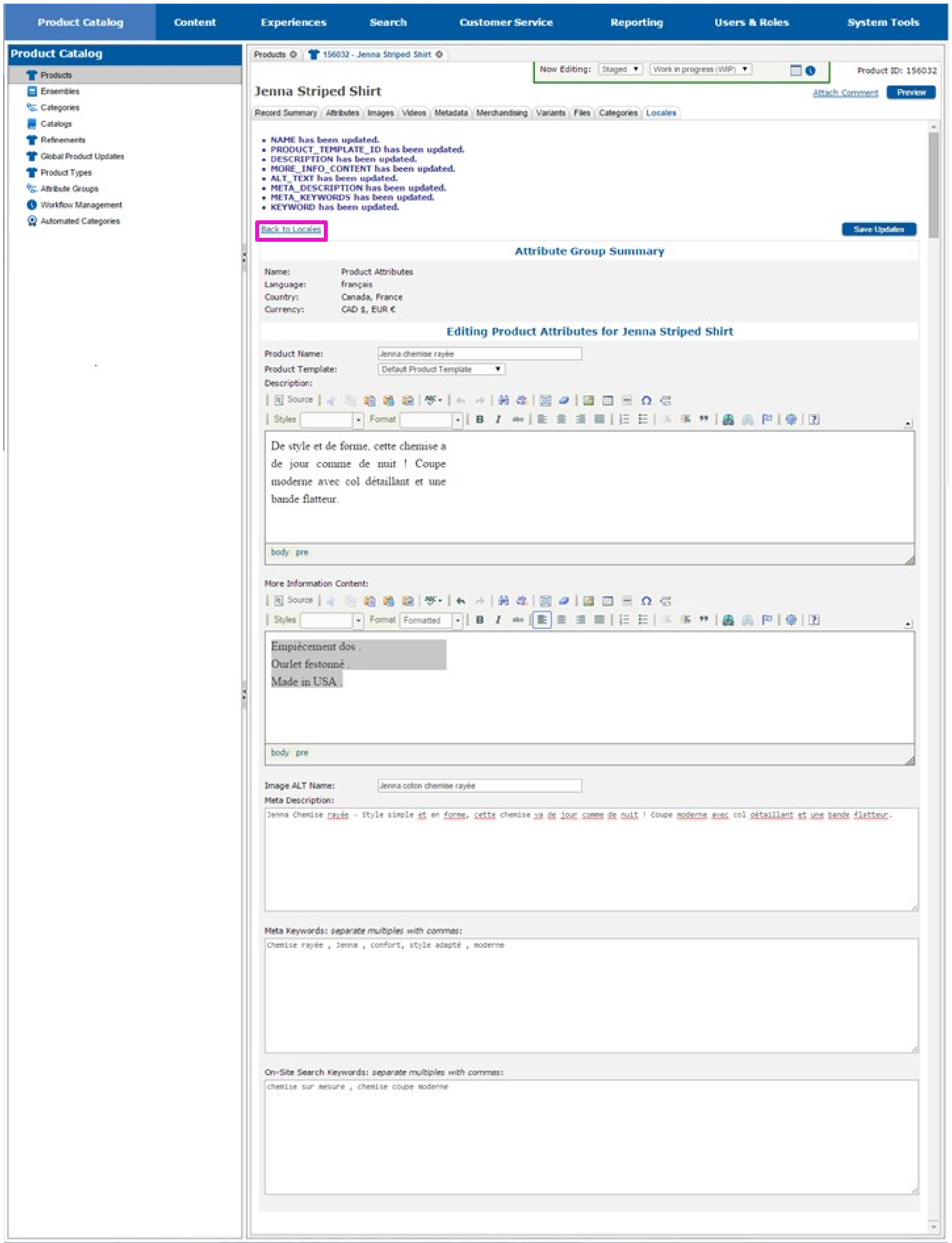
⇨ Select SAVE UPDATES.



The page will redraw and you will see messages at the top of page showing which attributes were modified.



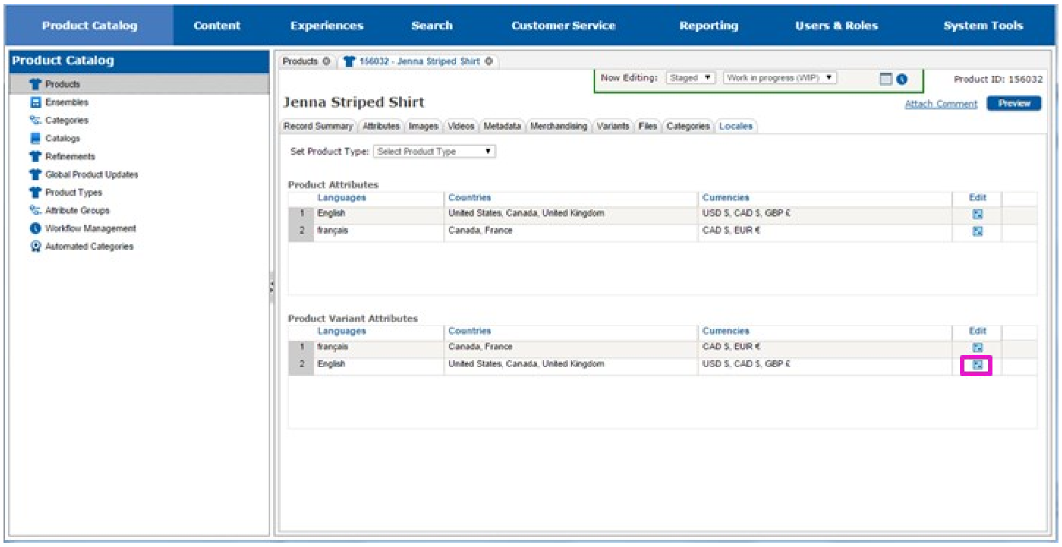
⇒ Select BACK TO LOCALES to return to the main LOCALES tab.



The page will redraw and you will be returned to the main LOCALES tab. Repeat editing the product attributes for each locale that you want to make customizations for.

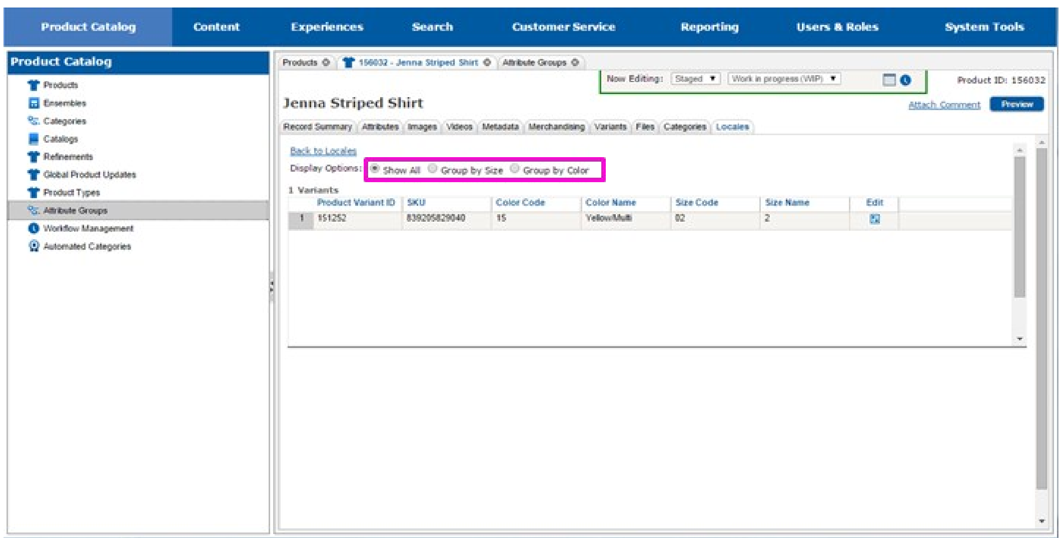
You will modify the product's variant attributes for each locale next.

⇒ Select the EDIT icon to the right of the locale in the PRODUCT VARIANT ATTRIBUTES list that you wish to make modifications for.

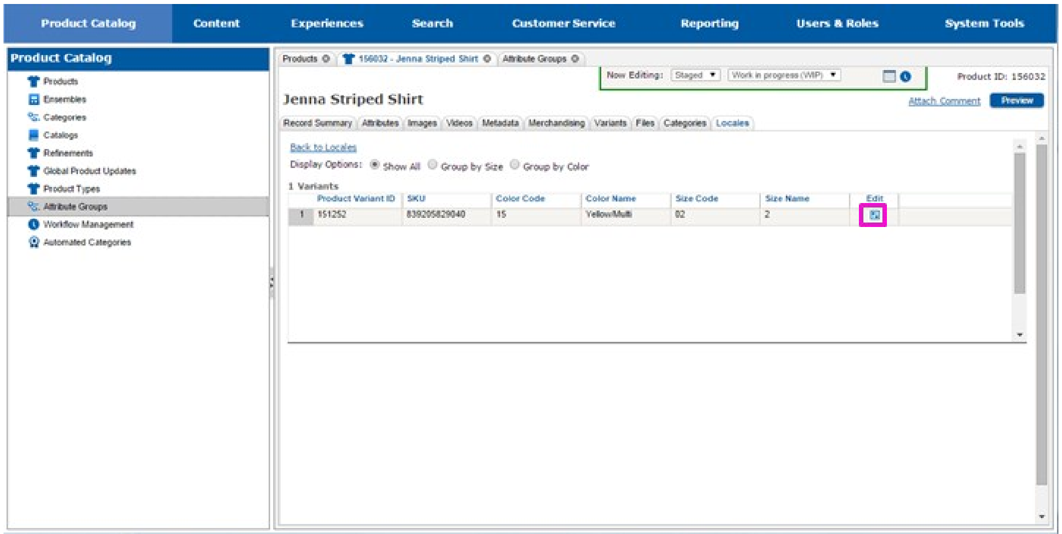


The page will redraw and you will see the page for editing variant attributes.

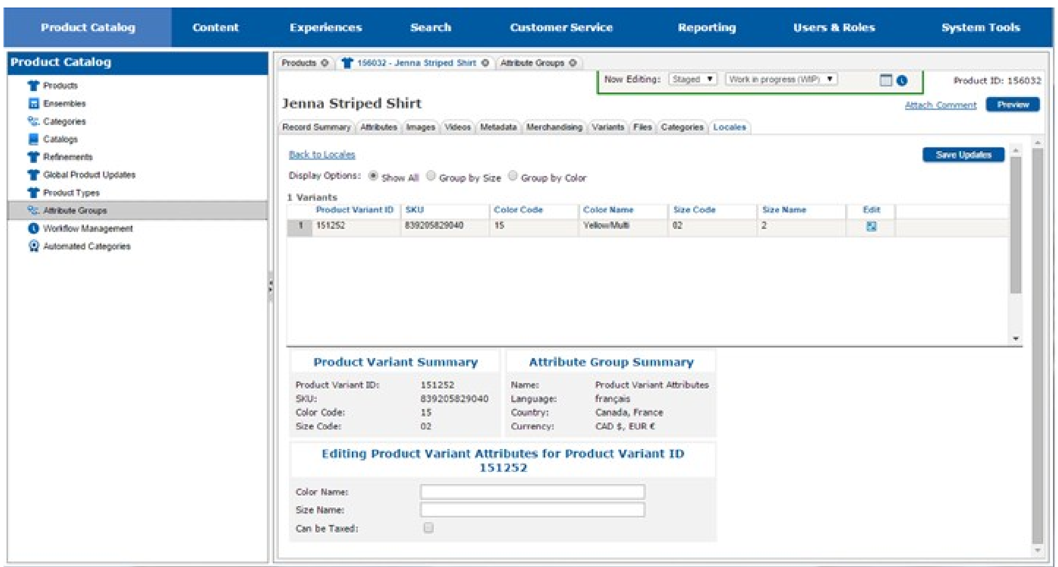
⇒ Use the DISPLAY OPTIONS to tailor the view of the variants.



⇒ Select the EDIT icon to the right of the variant you want to modify.



The page will redraw and you will see the variant attributes that can be modified.

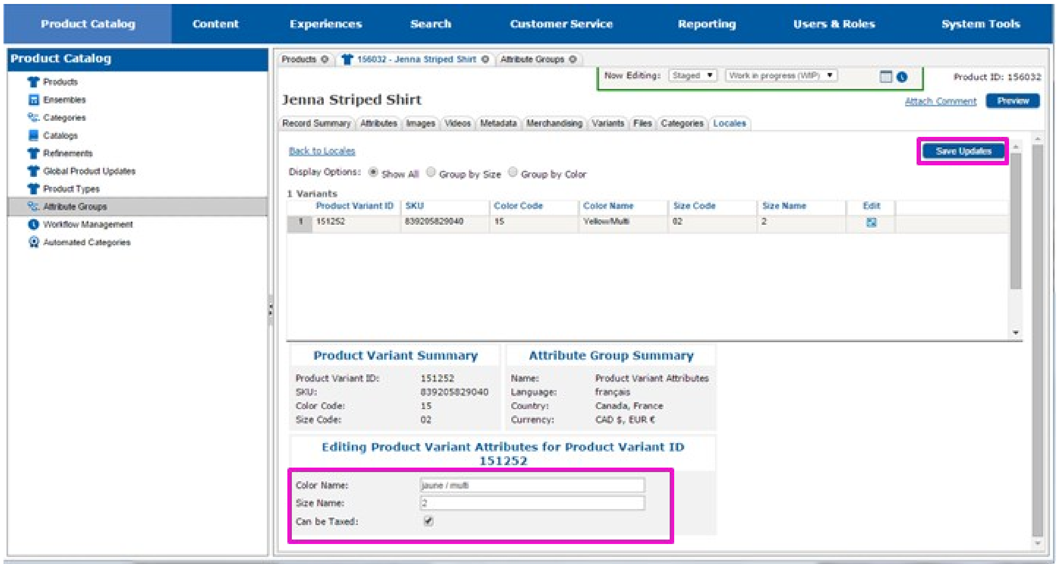


⇒ Enter localized text for the variant's COLOR NAME.

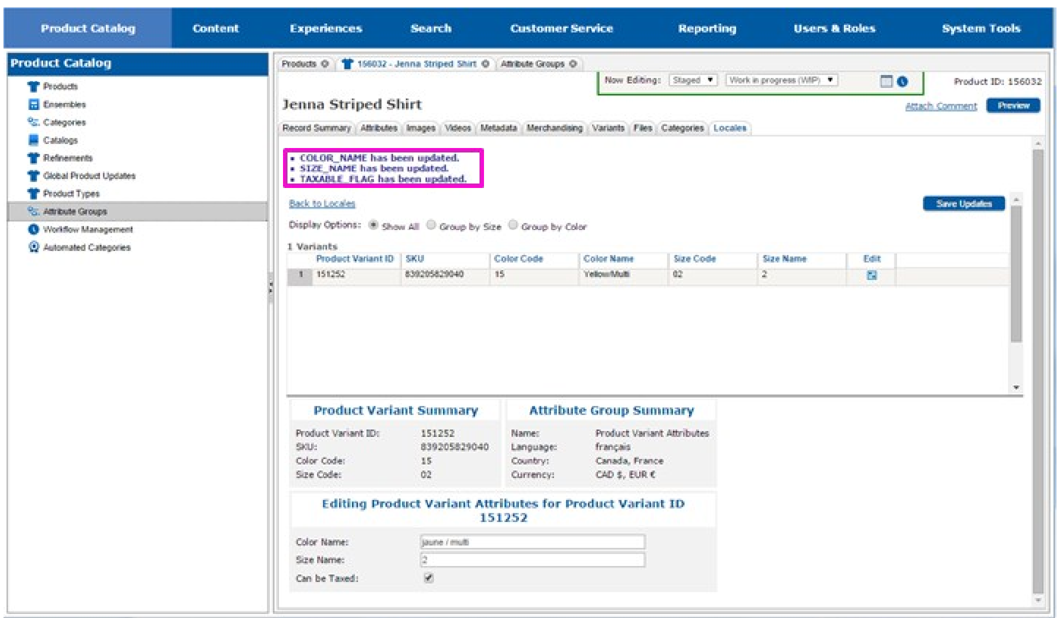
⇒ Enter localized text for the variant's SIZE NAME.

⇒ Select or deselect the CAN BE TAXED checkbox to indicate if the variant can be taxed in the locale.

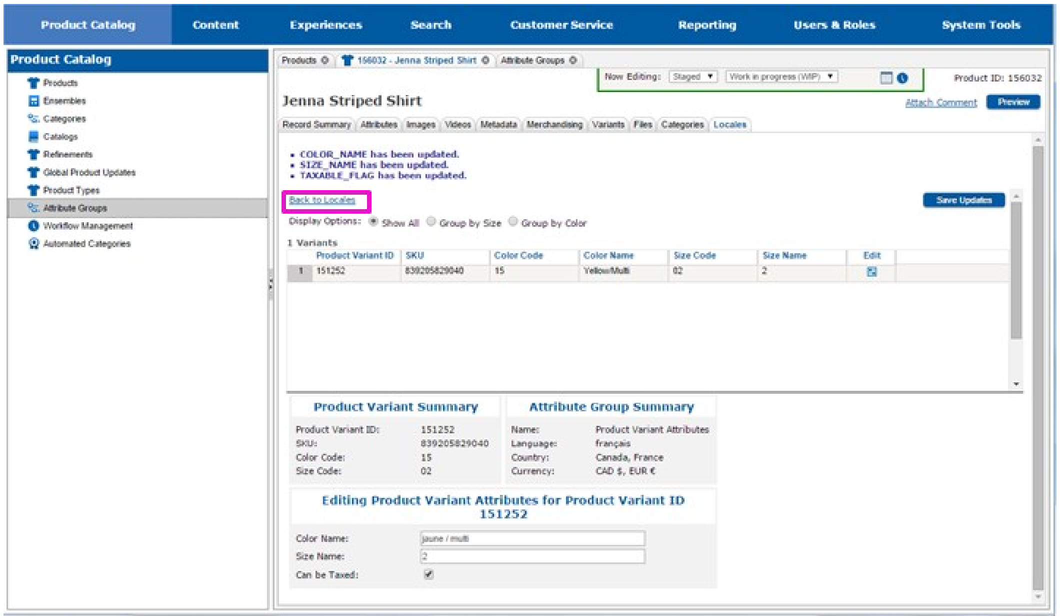
⇒ Select SAVE UPDATES.



The page will redraw and you will see messages at the top of the page indicating which attributes were saved.



⇒ Select BACK TO LOCALES to return to the main LOCALES tab.



The page will redraw and you will be returned to the main LOCALES tab. Repeat editing the product variant attributes for each locale that you want to make customizations for.

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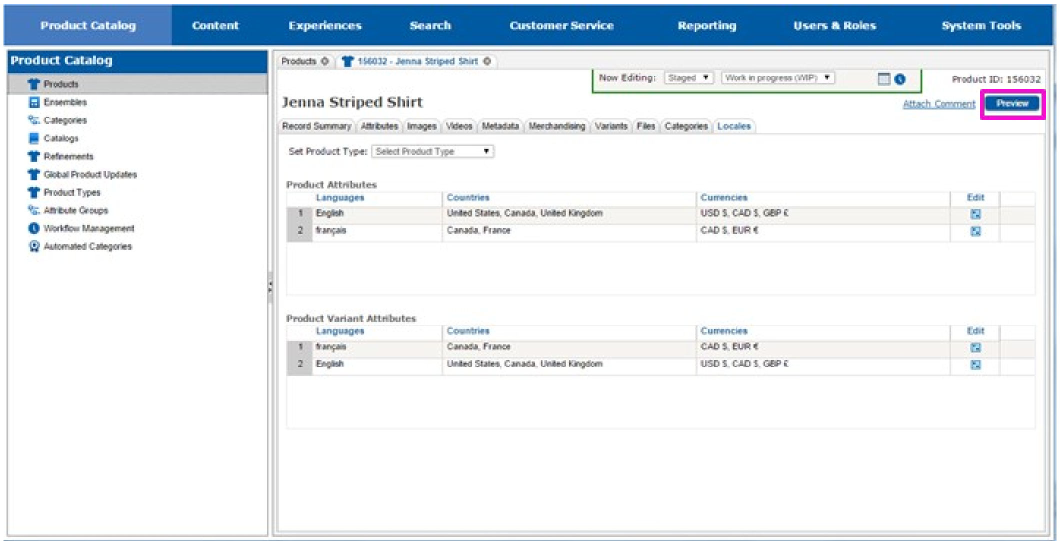
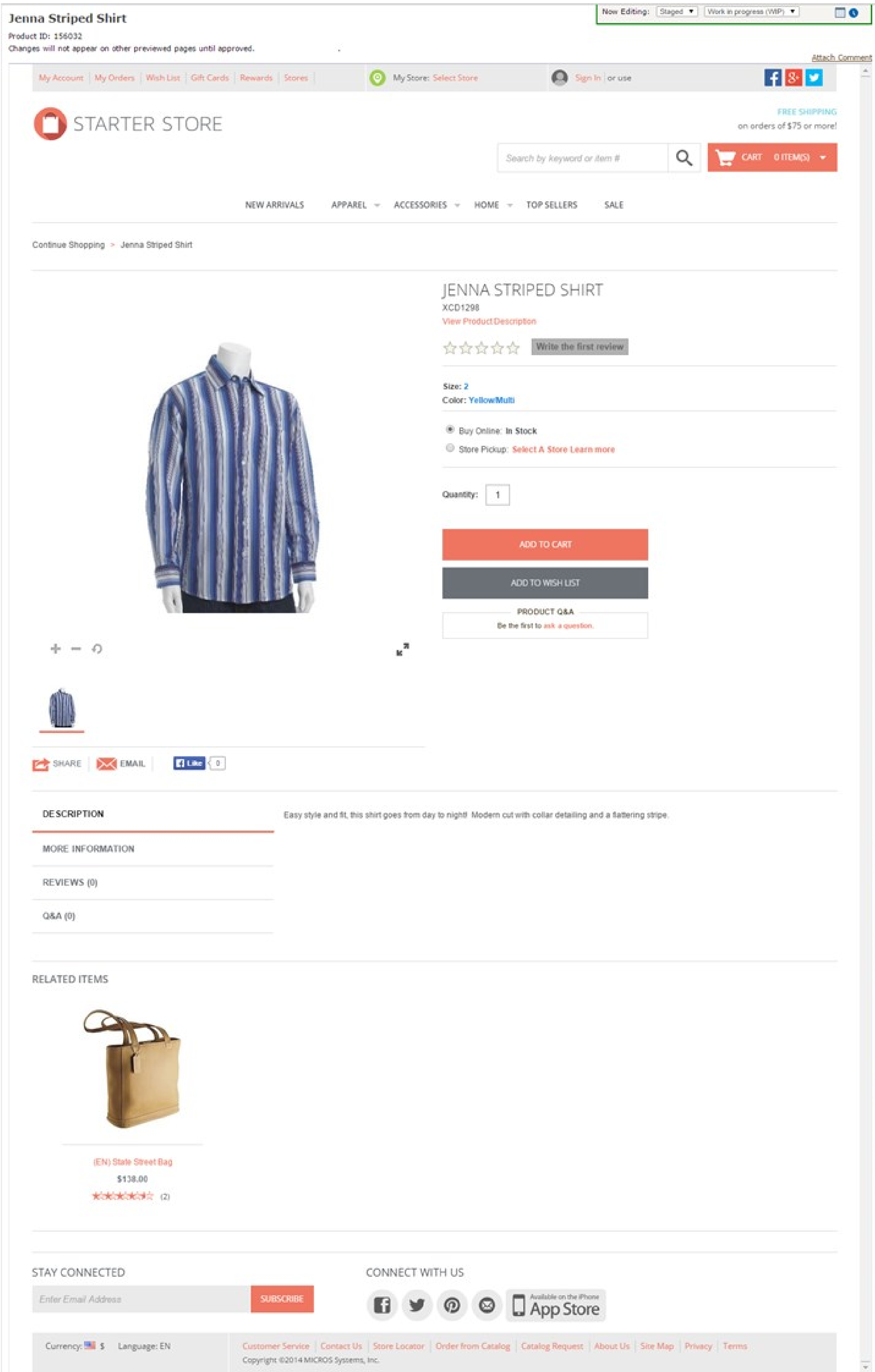
Optional - Previewing the Product

You may preview the product at any time while you are entering information for it. The preview shows you what the product's page on the website will look like, given the information that is currently defined for it. Although the sample image shows the current tab page as the LOCALES tab, you can preview the page while you are on any of the tab pages.

⇒ Select PREVIEW.



A new window will appear. The window will contain the product's website page, as it would look with the information currently defined for it.



See also

Before You Begin

Home > Tutorials > Modifying Content

Modifying Content

This tutorial describes how to schedule content changes for areas on pages that have been reserved for content changes. Every website has pages that have areas reserved for content that is meant to change occasionally. These areas are frequently used to advertise promotions, news, or special products or features of the website. Examples include the home page and other landing pages, where areas are frequently used to bring new information to the attention of the visitor. The areas that can change are administered by the Site Manager utility, which allows you to schedule content changes for the areas.

You may use this tutorial in two ways:

1. To add new content and approve it for publishing, follow the instructions in each section in the order the sections appear. This will walk you through all the necessary steps to add and publish new content.
2. To perform a specific task(s), follow the instructions in the specific section(s) for that task(s). Each section will tell you if there are any sections that need to be completed before the section can be started. This will allow you to perform one or more of the tasks needed to add and publish new content without doing all of the tasks.

Conventions Used in this Tutorial

SMALL CAPS: Items that appear in small caps refer to text items on the application. If you are viewing the application, you should see a label, menu, or button with the same text on it.

⇒: Arrows appear at the beginning of areas that contain a task you should perform. When you see the arrow, you should perform the described task.

: Pink outline boxes are used to highlight areas of screenshots that are being referred to in the text. These are used to call attention to a particular area of the screen, but you will not see those boxes on your screen when you are using the application.

Articles in this section

Before You Begin
The Example Used
Working with Content
Upload New Media
Locate the Page and Area for New Content
Schedule New Content
Preview New Content
Edit New Content
Mark Content Ready for Approval
Approve or Decline Content
View Released Content
Locate Content by Date or Status
Locate Content by Section and Page
Content Statuses

See also

Adding Products To Categories
Adding Synonyms to the Thesaurus
Creating an Experience for a Promotion
Creating an Experience for an A/B Test
Creating Dynamic Attributes
Creating New Products
Working With Stores

Before You Begin

Before you begin modifying content, you should:

- Have a valid Site Manager log in and know how to access the Site Manager;
- Know how to navigate the Site Manager and find various sections in it;
- Be logged in to the Site Manager;
- Know the page(s) and area(s) on the page(s) that contains the content you want to modify;
- Know the content you want to place on the page(s);
- Know the date when the new content should begin appearing.

See also

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Home > Tutorials > Modifying Content > The Example Used

The Example Used

The example used in this document illustrates adding a new image to the home page of a website. The image has been created, but needs to be uploaded to the media area on the server where media files are stored.

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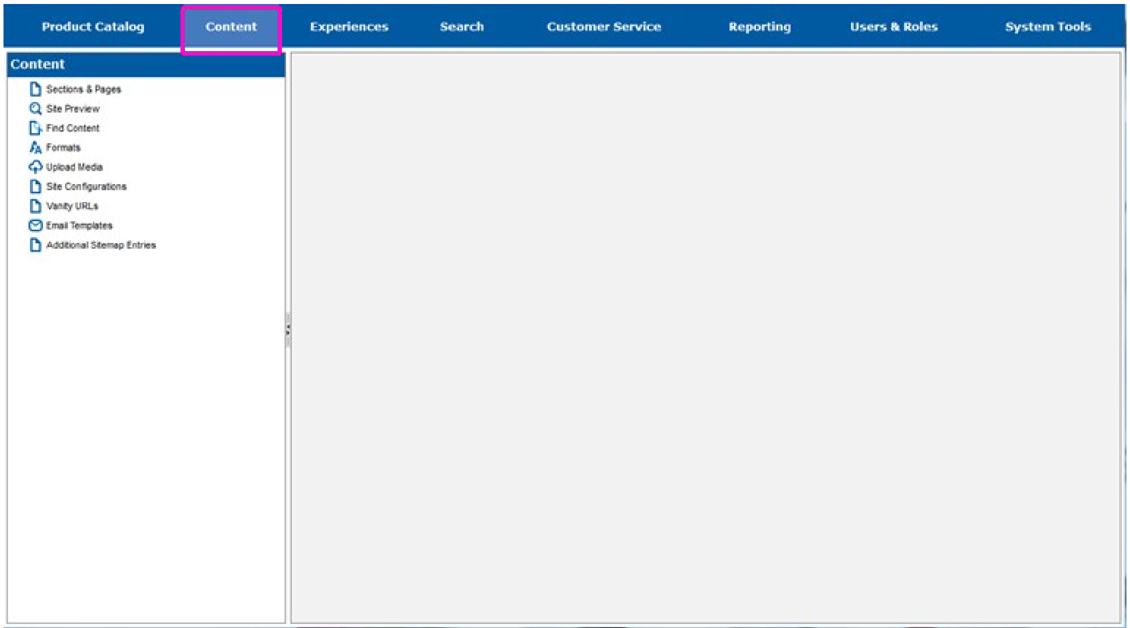
Home > Tutorials > Modifying Content > Working with Content

Working with Content

Content is managed in the CONTENT portion of the Site Manager. You will be working in the CONTENT portion for all of the sections in this document.

⇨ Select CONTENT.



If the content you are adding is a media file and is not presently on the media area of the server where the media is stored, you will need to follow the directions in section Upload New Media to upload the new content. If your new content is not a media file, or is a media file and is already on the media area of the server, you should continue on to section Locate the Page and Area for New Content.

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Locate Content by Section and Page
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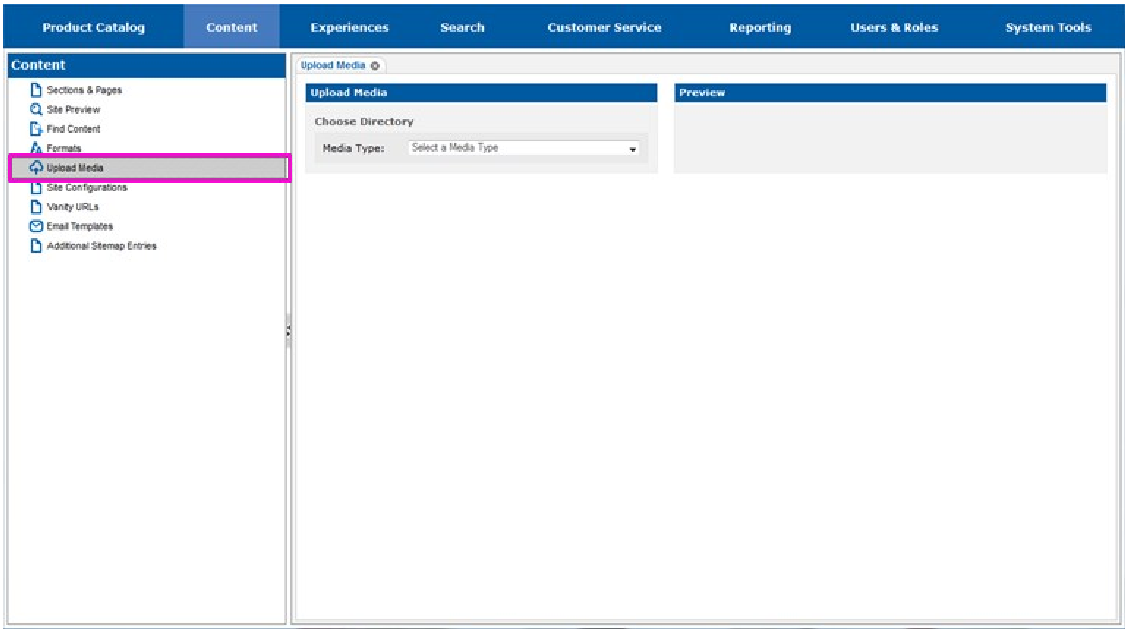
Home > Tutorials > Modifying Content > Upload New Media

Upload New Media

Media is added to the site in the UPLOAD MEDIA section.

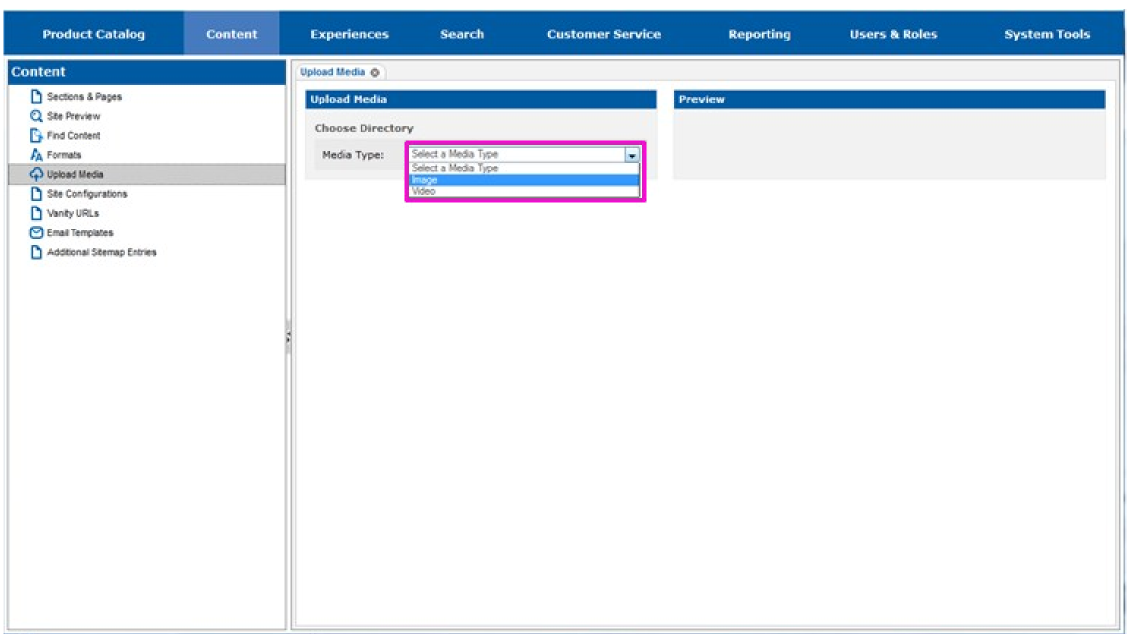
⇒ Select UPLOAD MEDIA.

The right-hand portion of the page will fill in with fields for uploading new media files.



⇒ Select the MEDIA TYPE drop-down list.

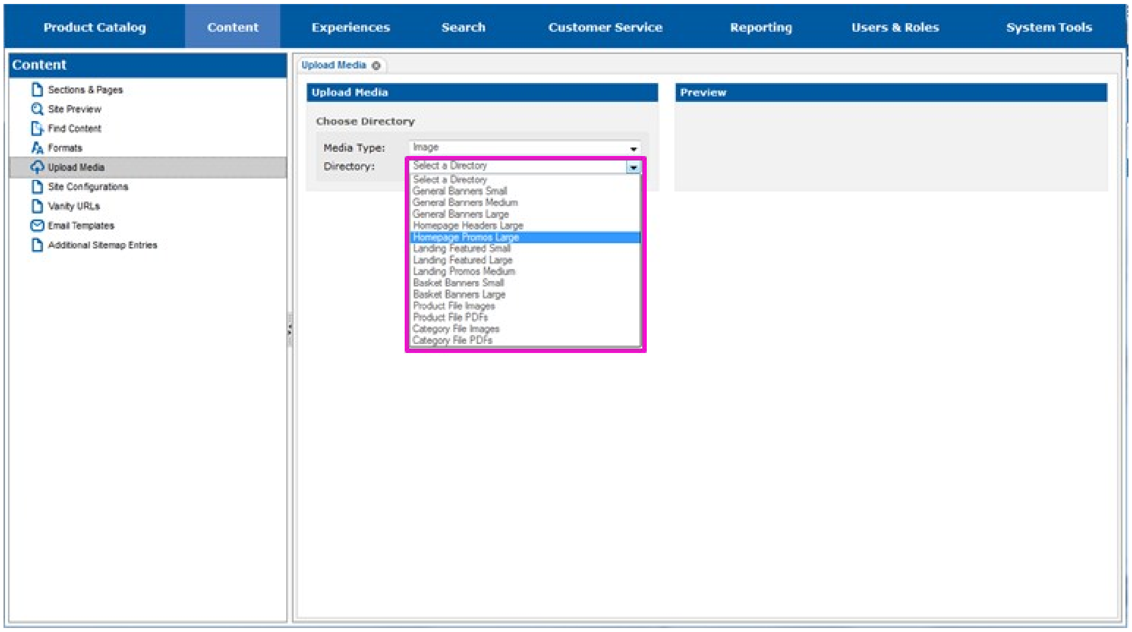
⇒ Select the type of media you want to upload.



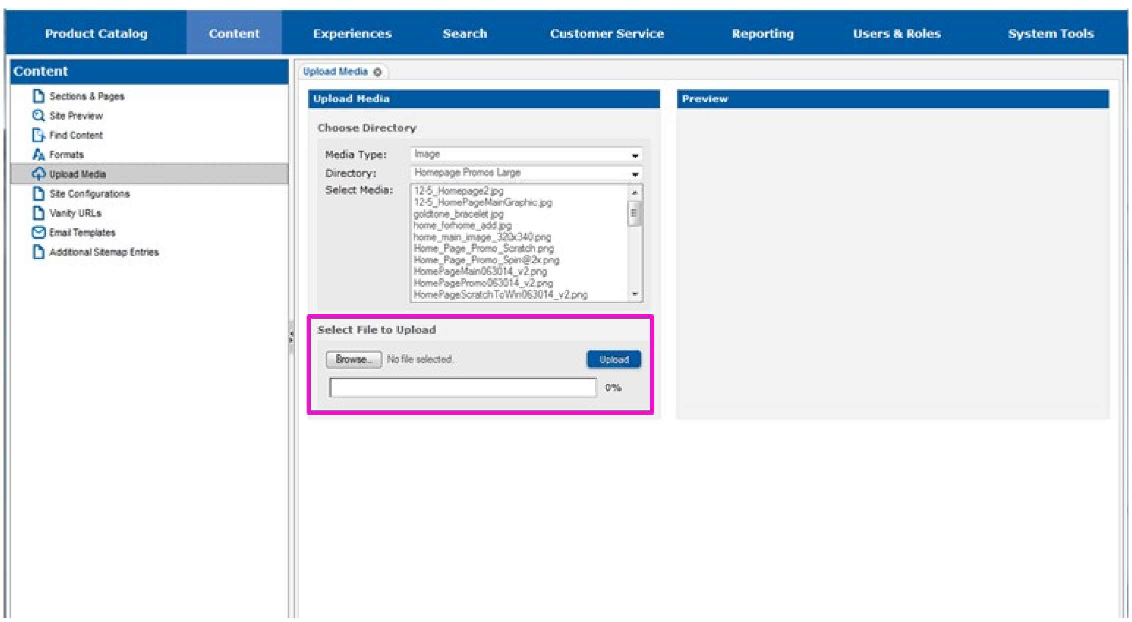
The page will redraw and you will see a drop-down box listing directories the new media can be placed in.

⇒ Select the DIRECTORY drop-down list.

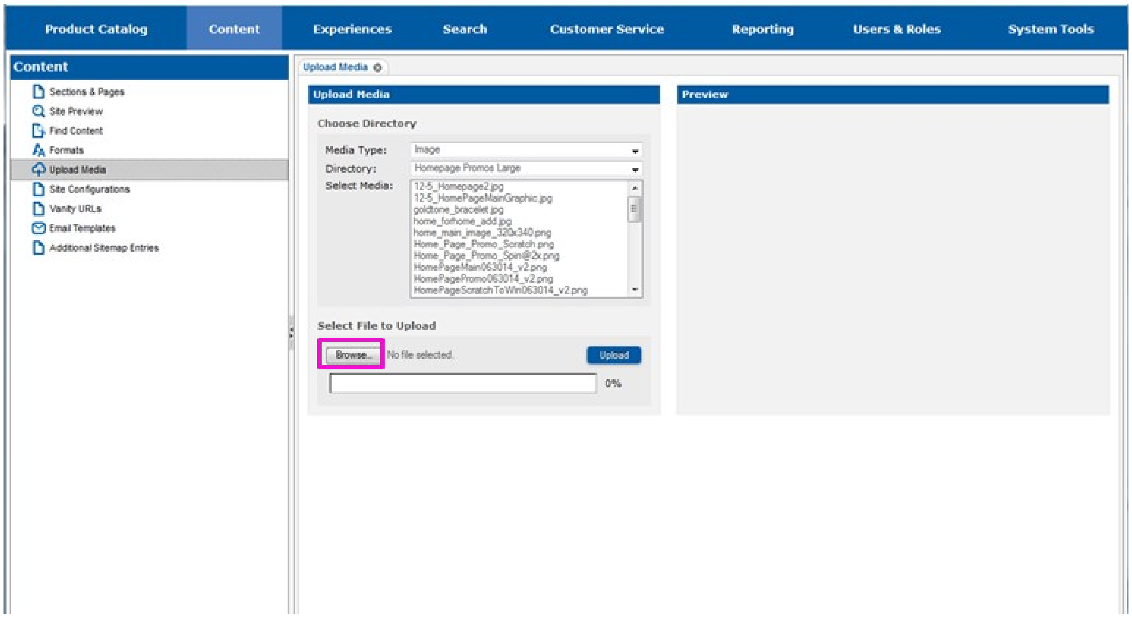
⇒ Select the directory the new media should be placed in.



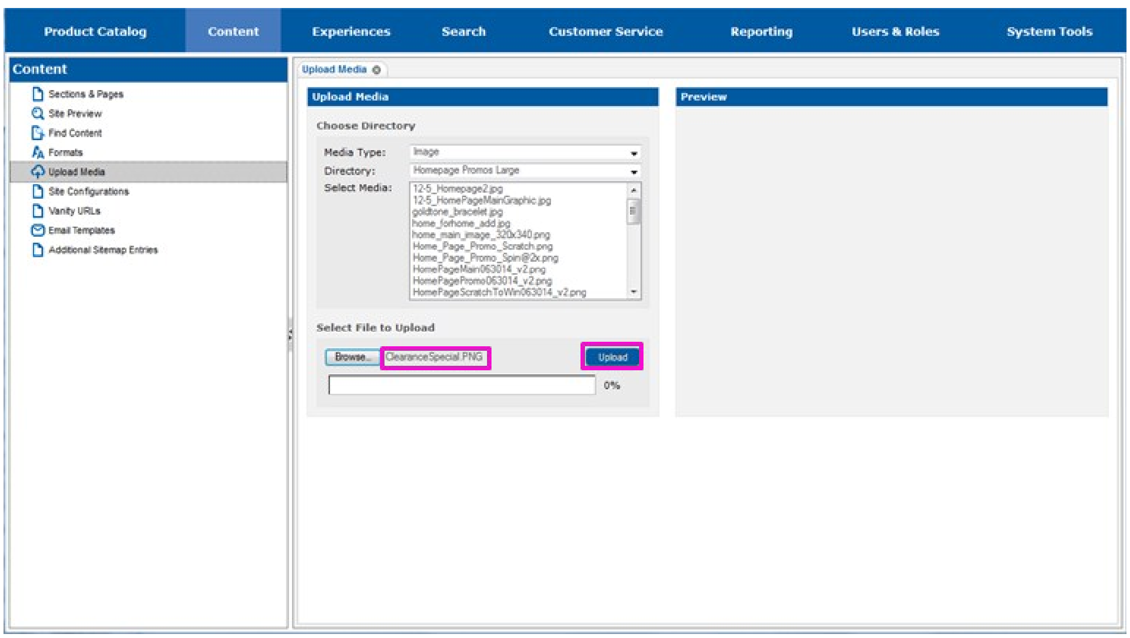
The page will redraw and you will see a list box that contains all the files currently in the directory you chose. You will also see a section where you specify the new file that you want to upload.



⇨ In the SELECT FILE TO UPLOAD area, select the BROWSE button and browse for the file.

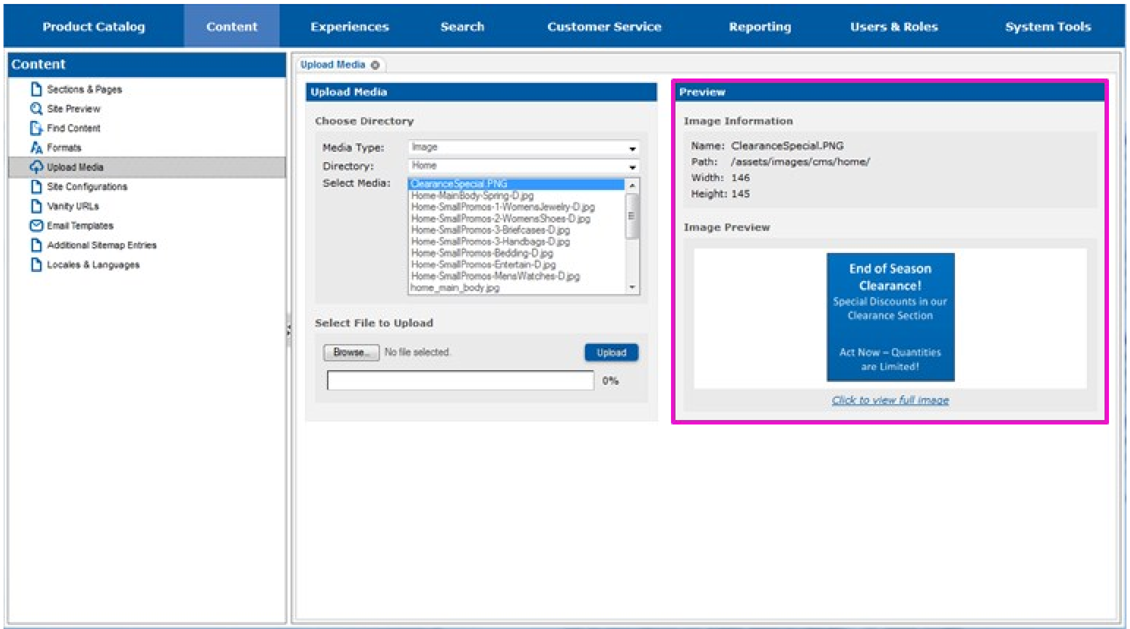


⇨ Select UPLOAD to begin uploading the file.



The progress of the upload will be displayed in the progress status bar just beneath the file name.

When the file has completely uploaded, the page will redraw. You will see your file listed in the SELECT MEDIA list box. The PREVIEW area of the page will contain information about the file, along with a preview of it, if possible.



Your new media is now ready for use on the website. To add it to a page on the website, continue on to section Locate the Page and Area for New Content.

See also

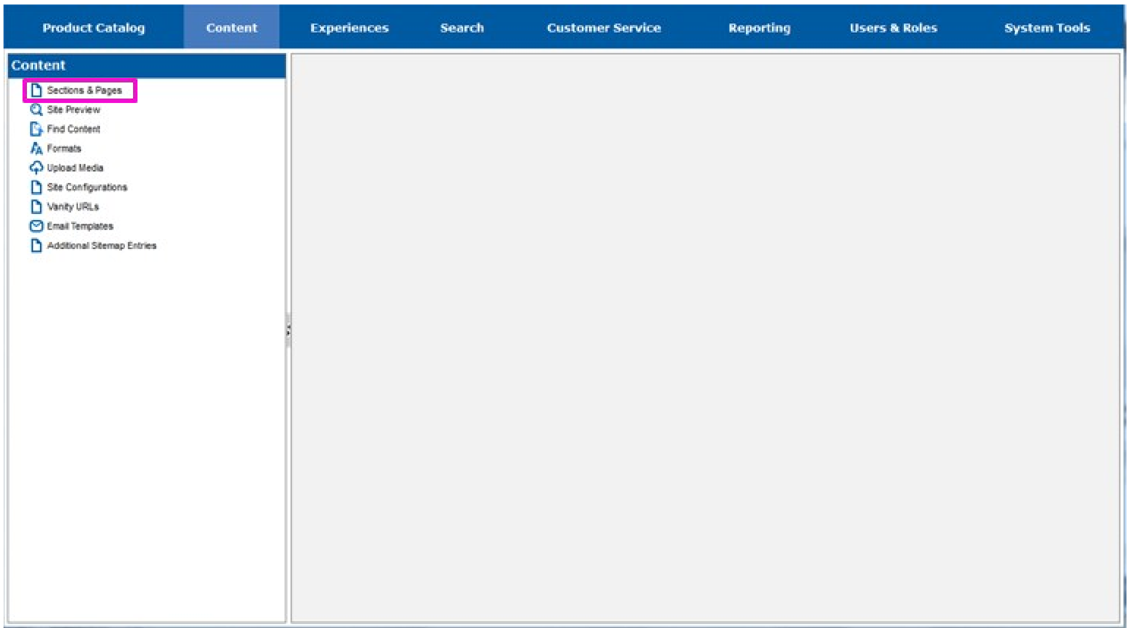
Before You Begin
The Example Used
Working with Content
Locate the Page and Area for New Content
Schedule New Content
Preview New Content
Edit New Content
Mark Content Ready for Approval
Approve or Decline Content
View Released Content
Locate Content by Date or Status
Locate Content by Section and Page
Content Statuses

Home > Tutorials > Modifying Content > Locate the Page and Area for New Content

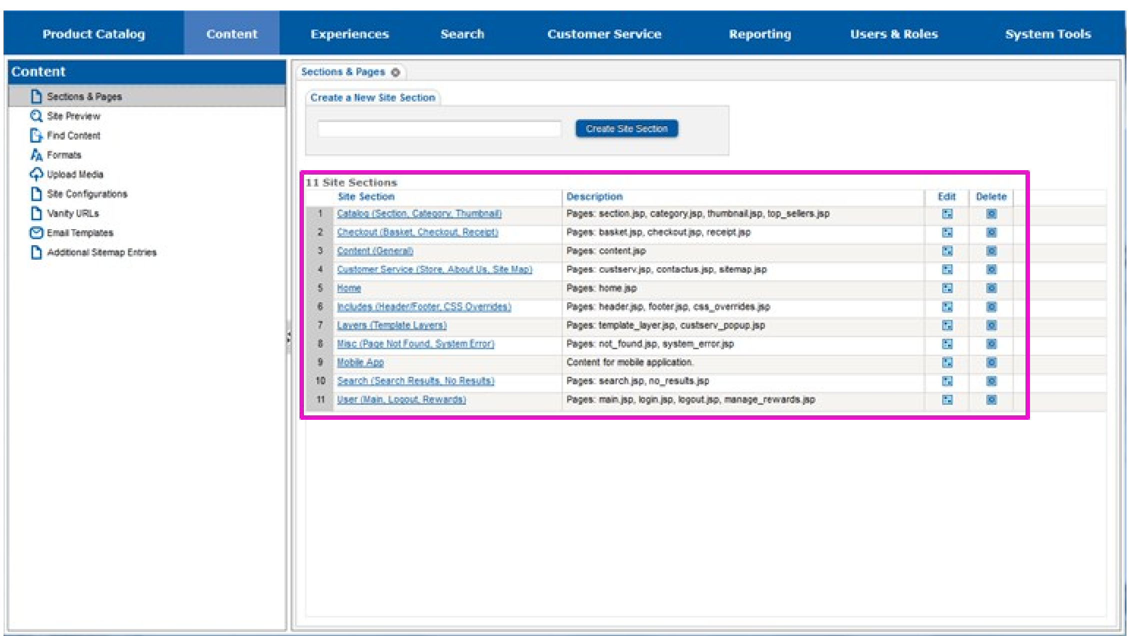
Locate the Page and Area for New Content

New content is added to a page on the website in the SECTIONS & PAGES section.

⇨ Select SECTIONS & PAGES.

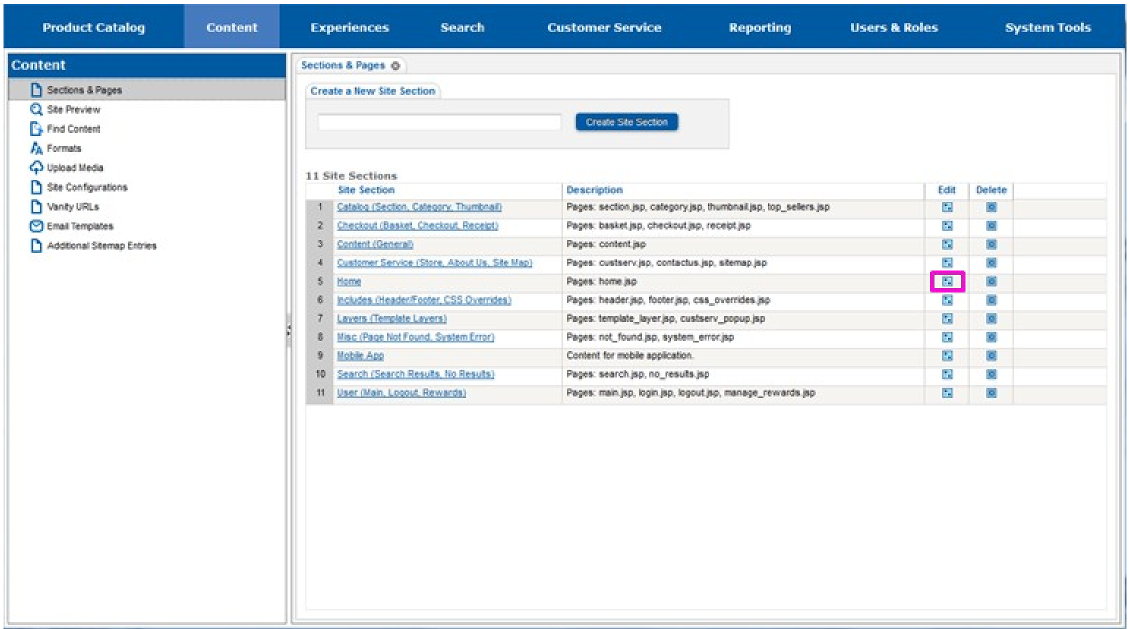


The page will redraw and you will see a list of all of the sections defined for the website. Sections are groups of pages that are similar in purpose or content. Grouping pages into sections makes the site easier to administer.



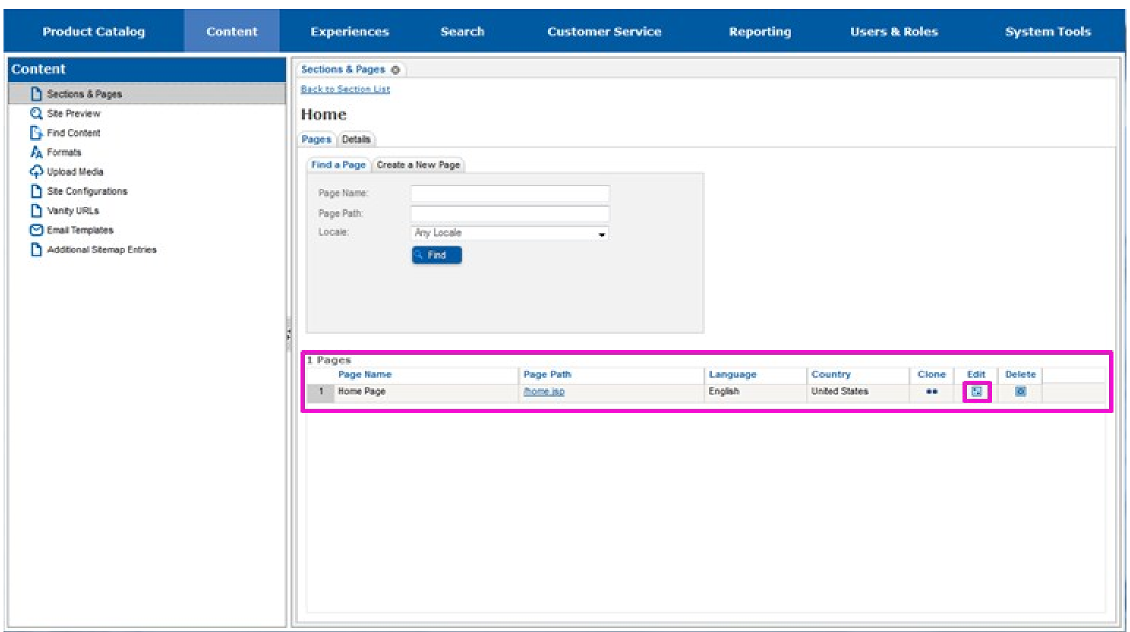
You will edit the section that contains the page you wish to modify.

⇨ Select the EDIT icon to the right of the section containing the page you want to modify.

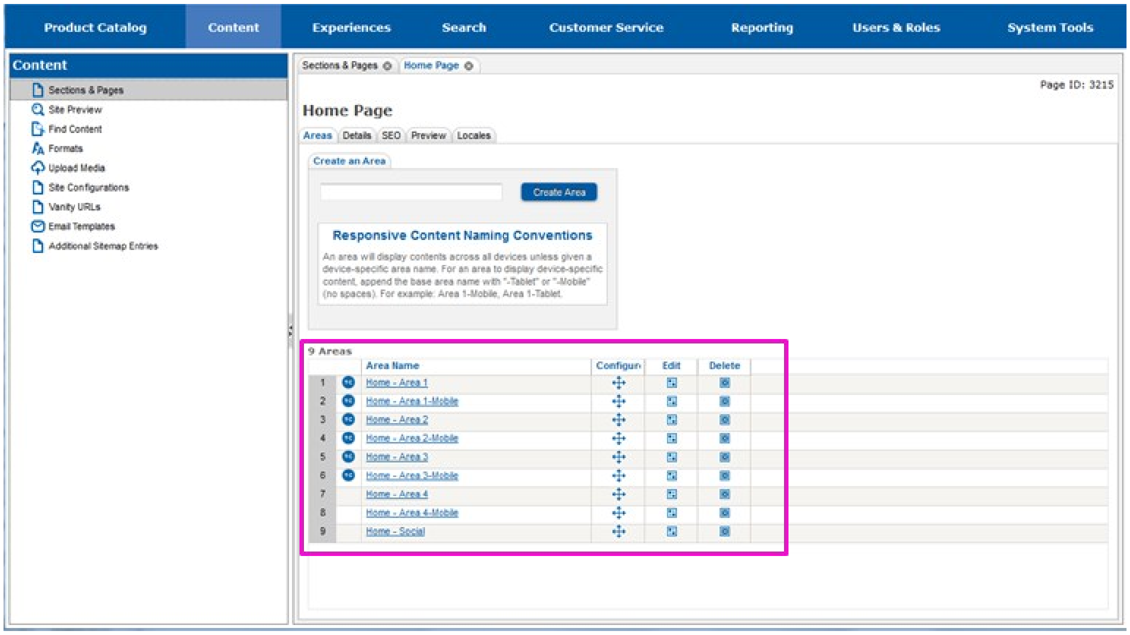


The page will redraw and you will see the list of pages in the section will at the bottom of the page. You will edit the page that you want to place the new content on.

⇒ Select the EDIT icon to the right of the page you want to modify.

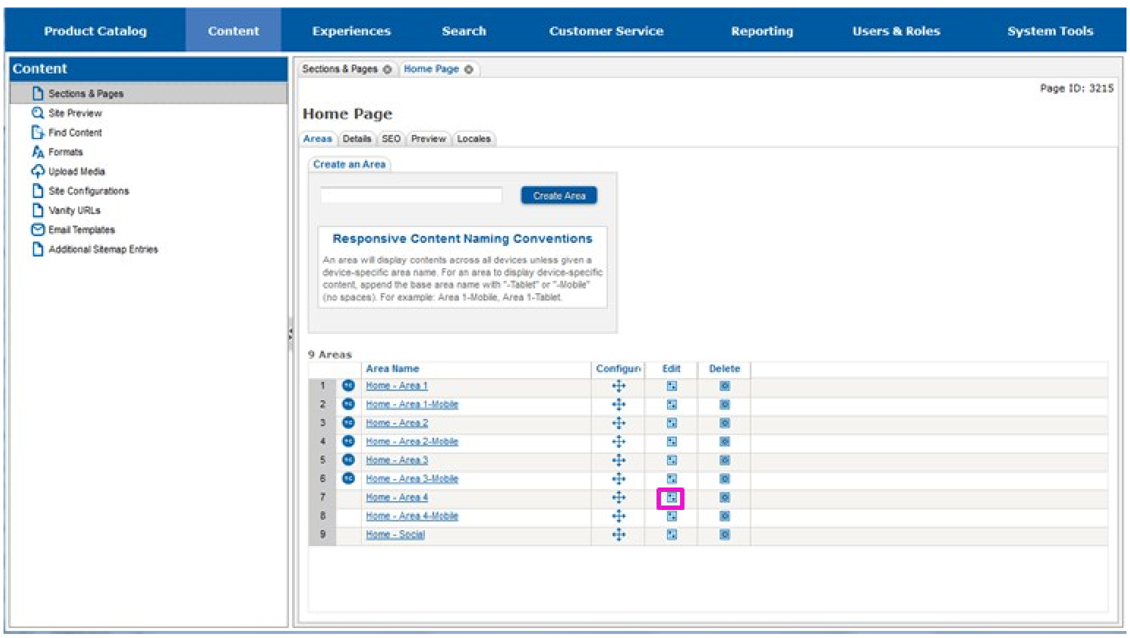


A new tab opens for the page you are editing. You will see the name of your page as the title of the tab. The tab contains a listing of the areas on the page. This shows how the page has been broken down into different areas, with the intention that content may change in one area without necessarily affecting the content in the other areas.

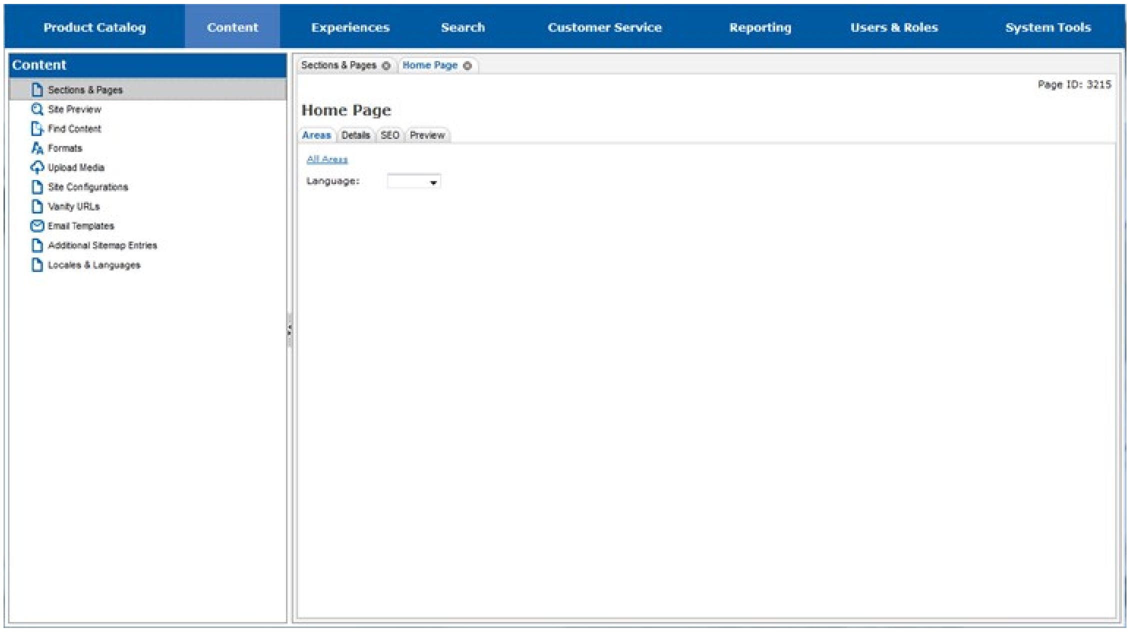


You will edit the area that you want to place the new content in.

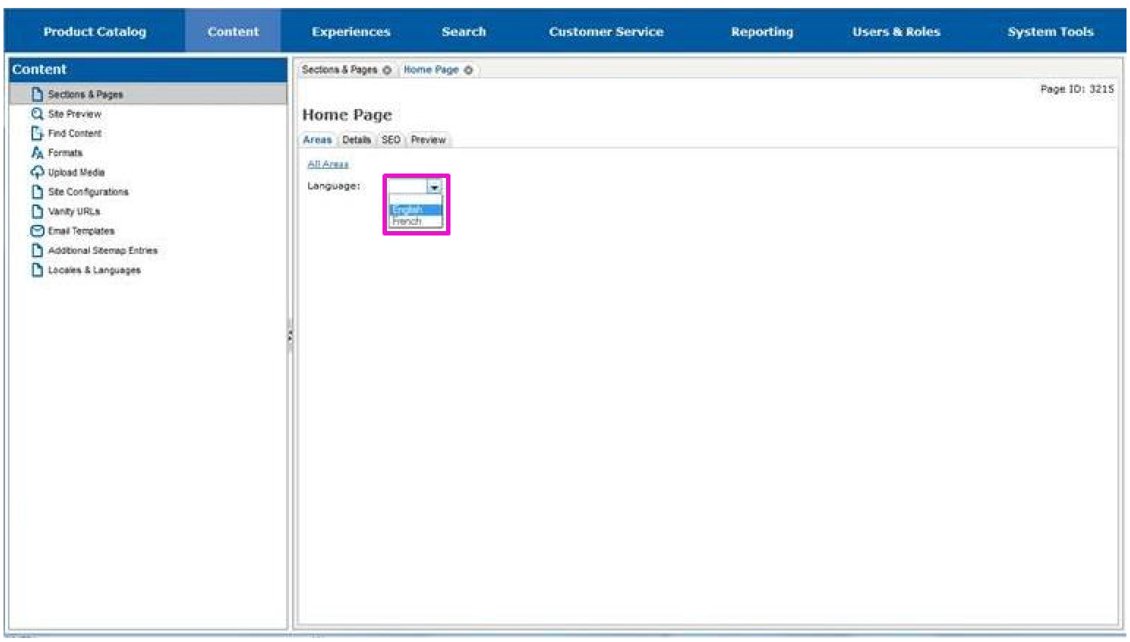
⇒ Select the EDIT icon to the right of the area that you want to place the new content in.



The page will redraw. If you have an international site, you will see a drop-down box to select the language that the new content applies to. You will need to select a language and a country for the new content.

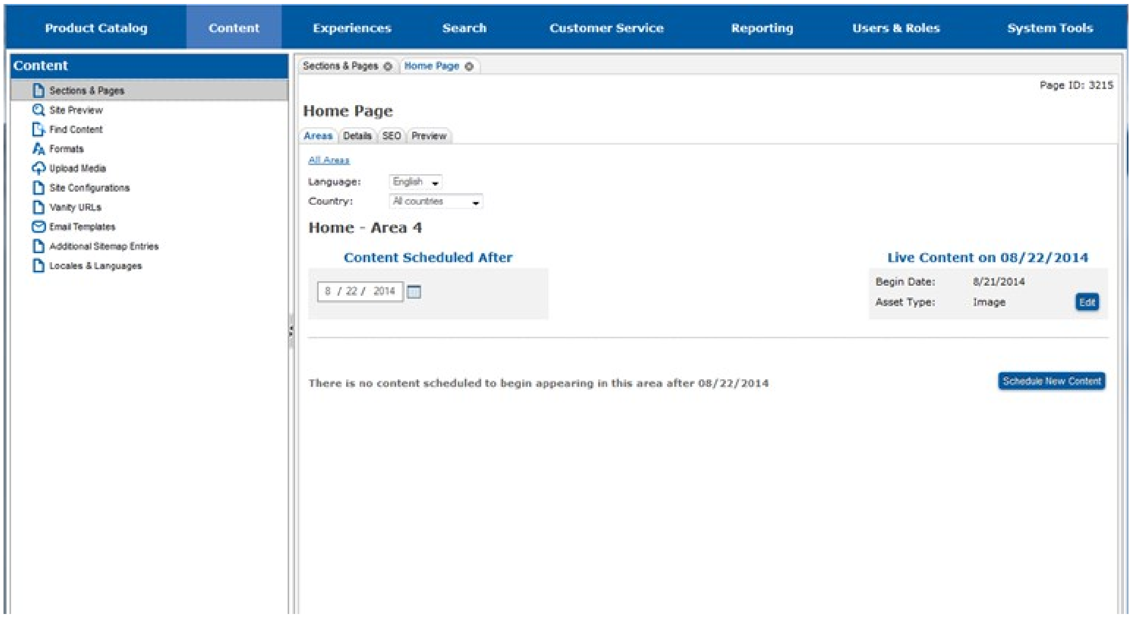


⇨ Select the LANGUAGE of the new content.



The page will redraw and the country selection box will appear. You will also see the content scheduled for the default country.

⇨ Select the COUNTRY the new content applies to.



You will see the content currently scheduled for your language and country selection. Continue on to section Schedule New Content to add your new content.

See also

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The Example Used
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Edit New Content
Mark Content Ready for Approval
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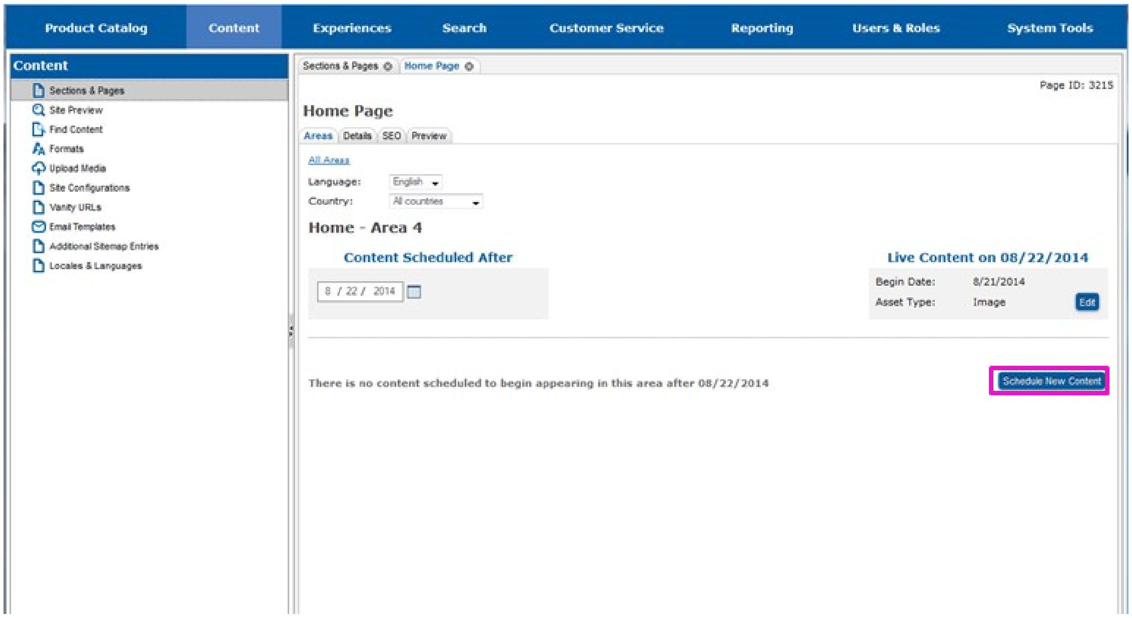
View Released Content
Locate Content by Date or Status
Locate Content by Section and Page
Content Statuses

Home > Tutorials > Modifying Content > Schedule New Content

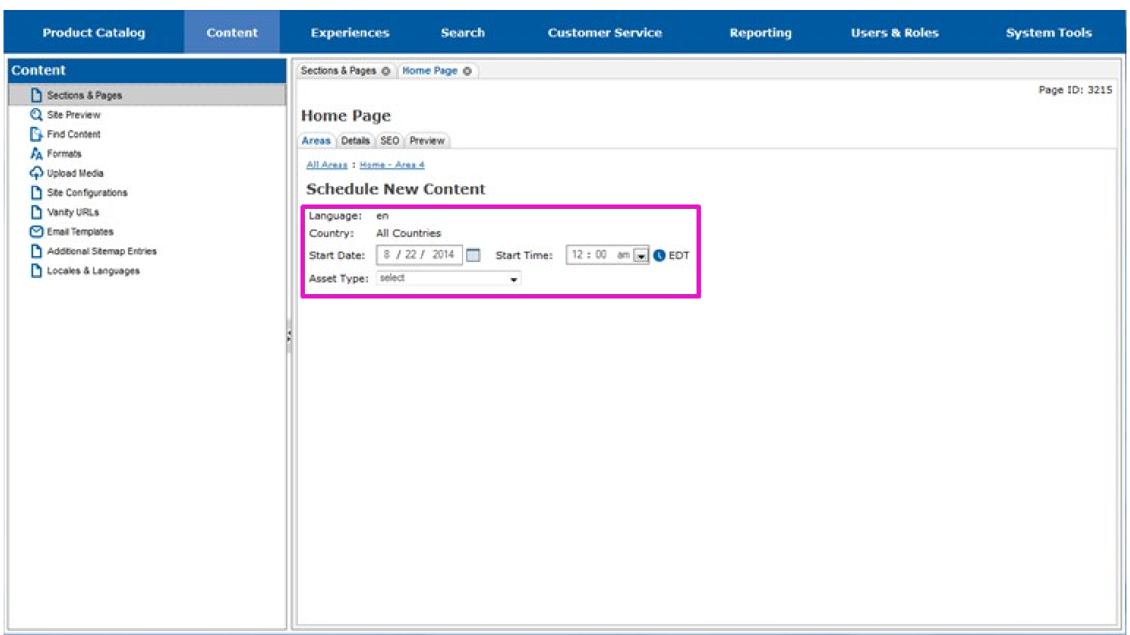
Schedule New Content

New content is scheduled from the AREAS tab for the specific area on the page you want the content to appear on. If you are not currently on this tab in Site Manager, follow the steps in section ***Locate the Page and Area for New Content*** before proceeding with this section.

⇒ Select SCHEDULE NEW CONTENT.

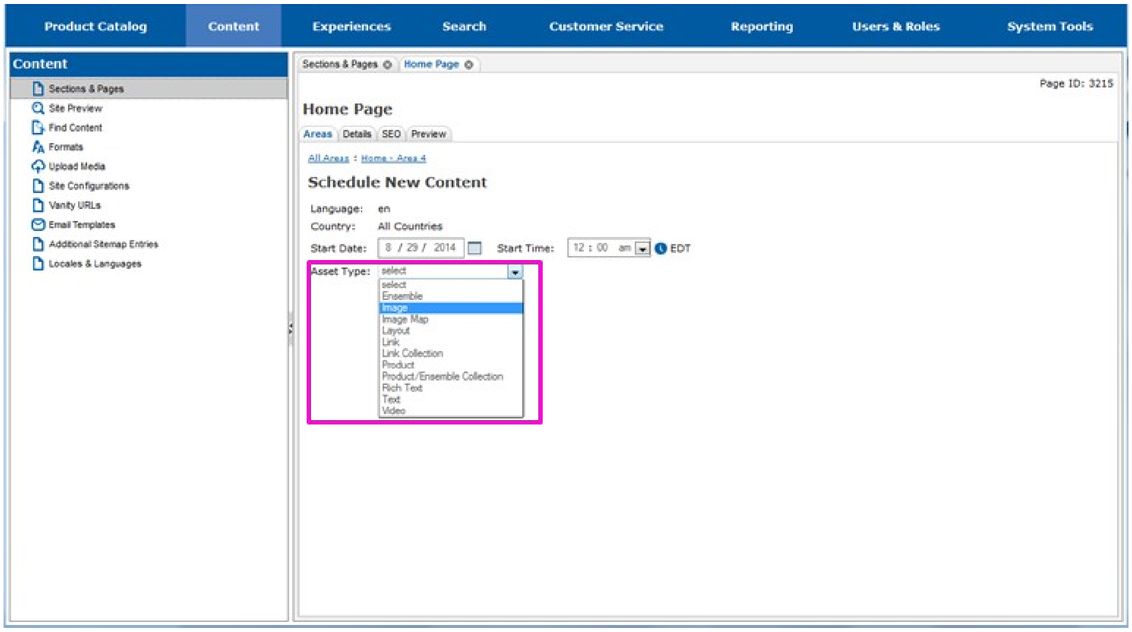


That page will redraw and you will see fields that allow you to schedule your new content.

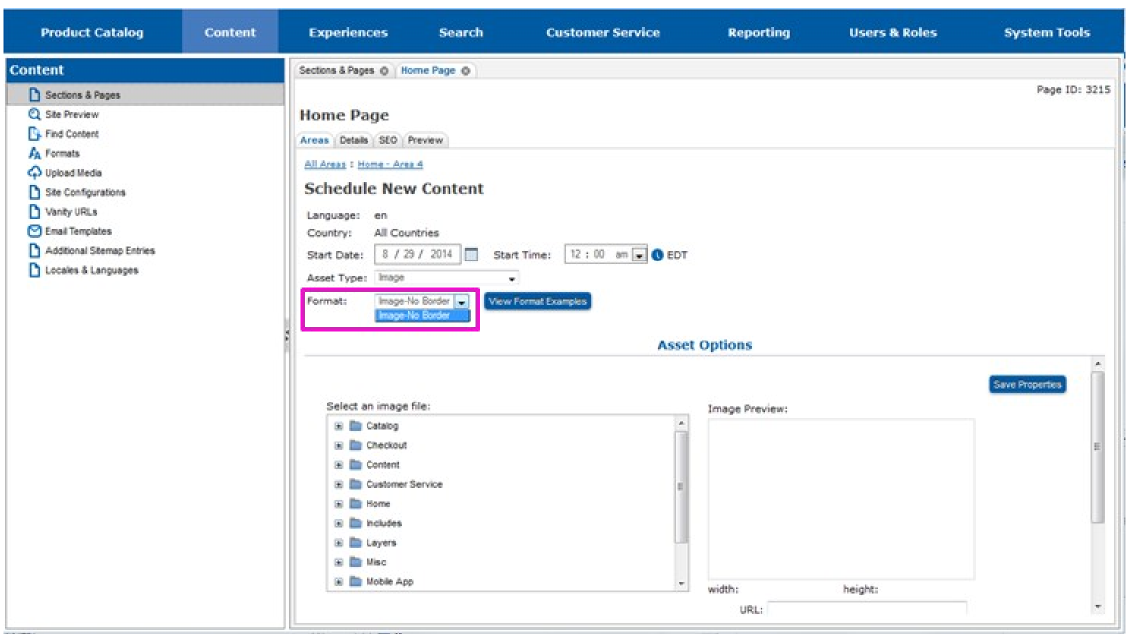


⇒ In the START DATE field, enter the date the new content should first appear on. You may also select the date using the calendar icon.

⇒ Select the type of content you are adding in the ASSET TYPE drop-down list.

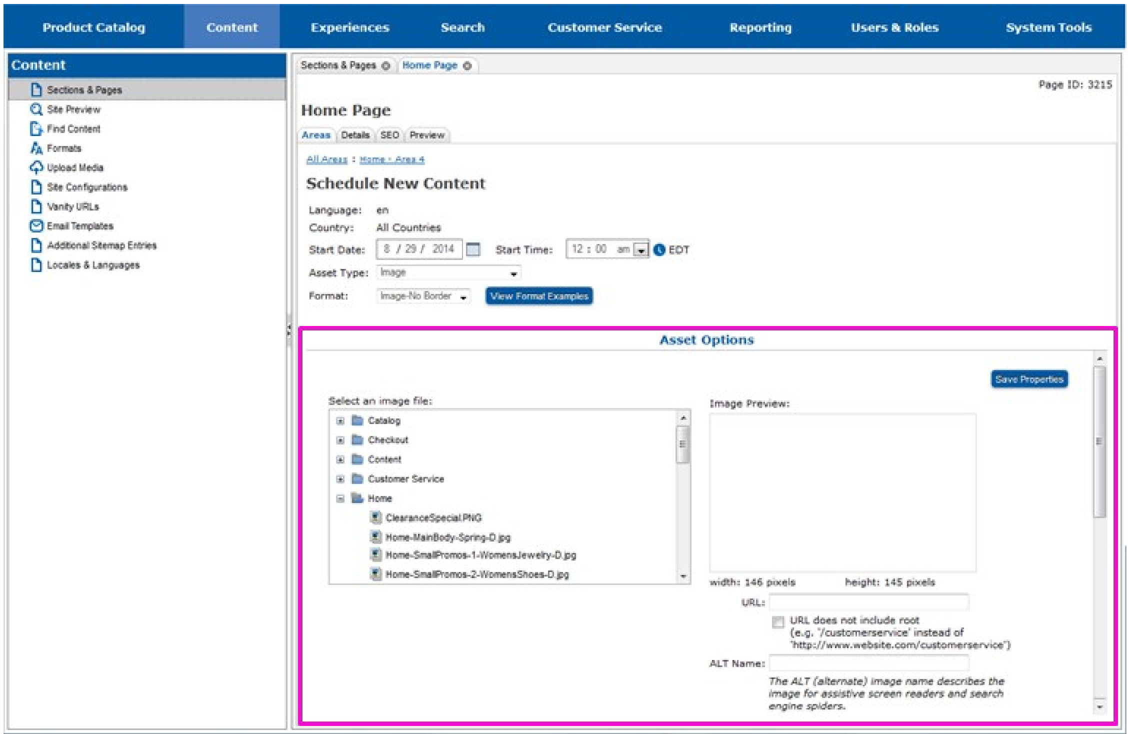


The screen will redraw, and you may see additional selection fields, based on the type of content you chose. Each type of content (or asset) requires different information before it can be scheduled to appear on the website. The information you need to fill in for your content may be different than the information shown in the example.

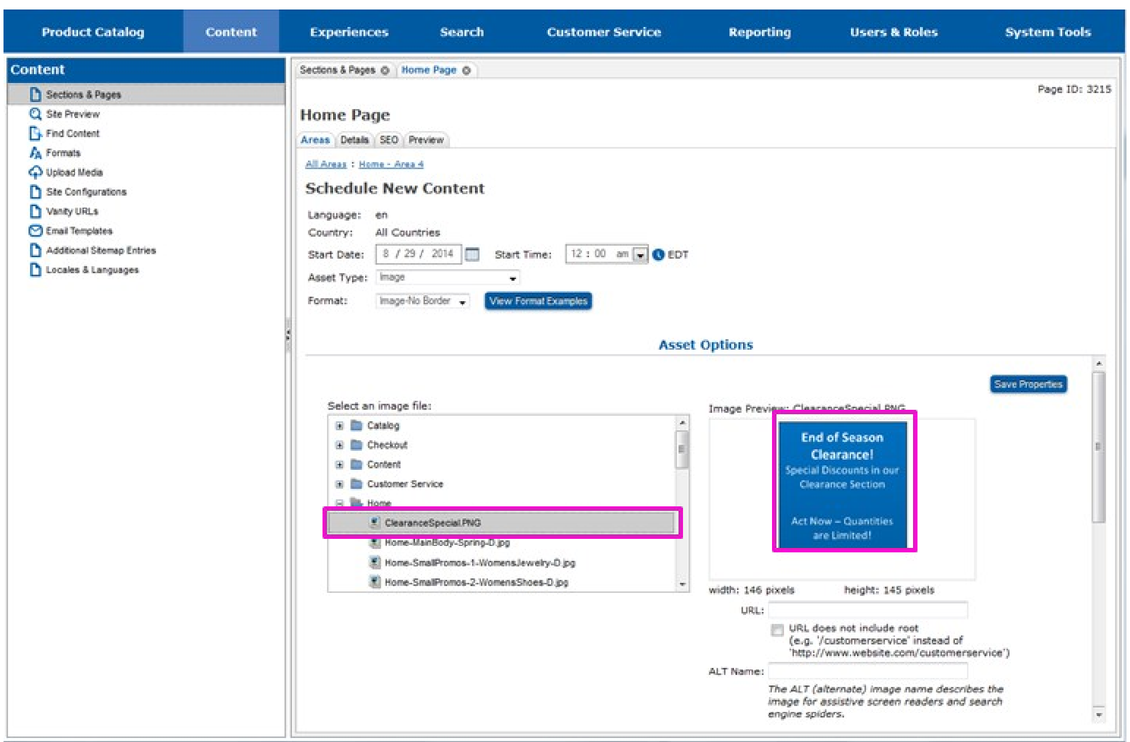


⇒ Make selections in any additional fields for the content you are adding.

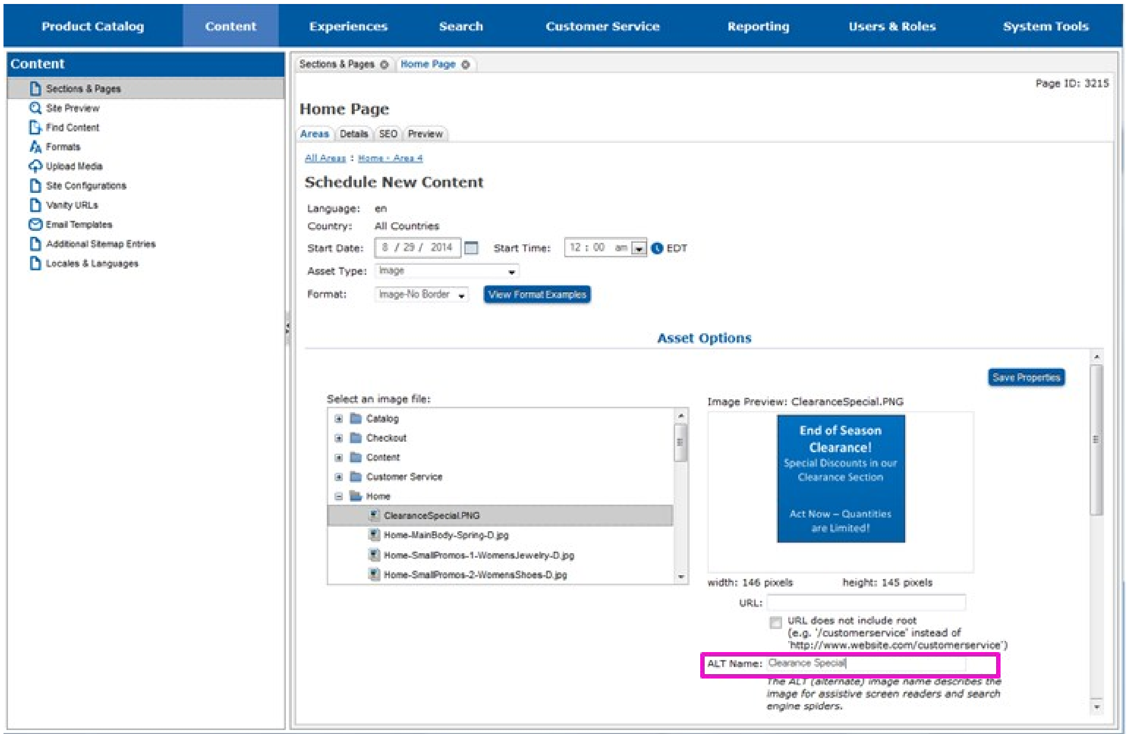
When you have made all your selections, the ASSET OPTIONS area will fill in with information that will allow you to select the specific piece of content that you want to add. The way content is selected may vary by asset type and what you see may look different than the example.



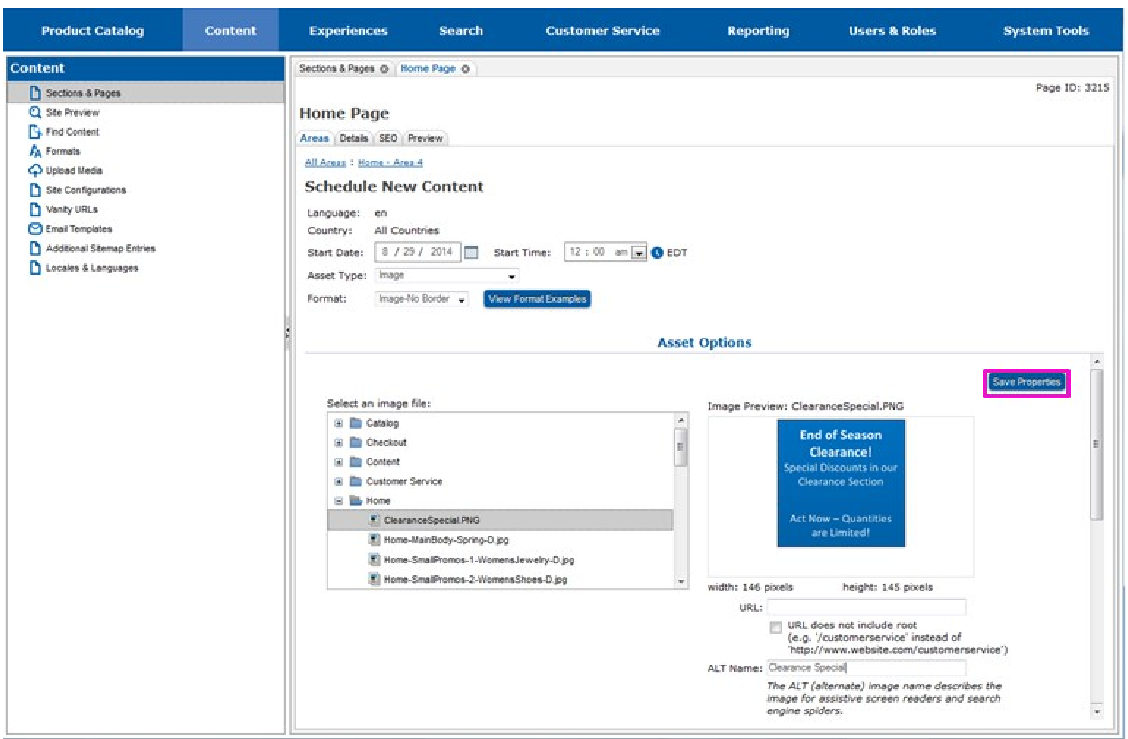
⇒ Using the fields in the ASSET OPTIONS area, select the content you want to add.



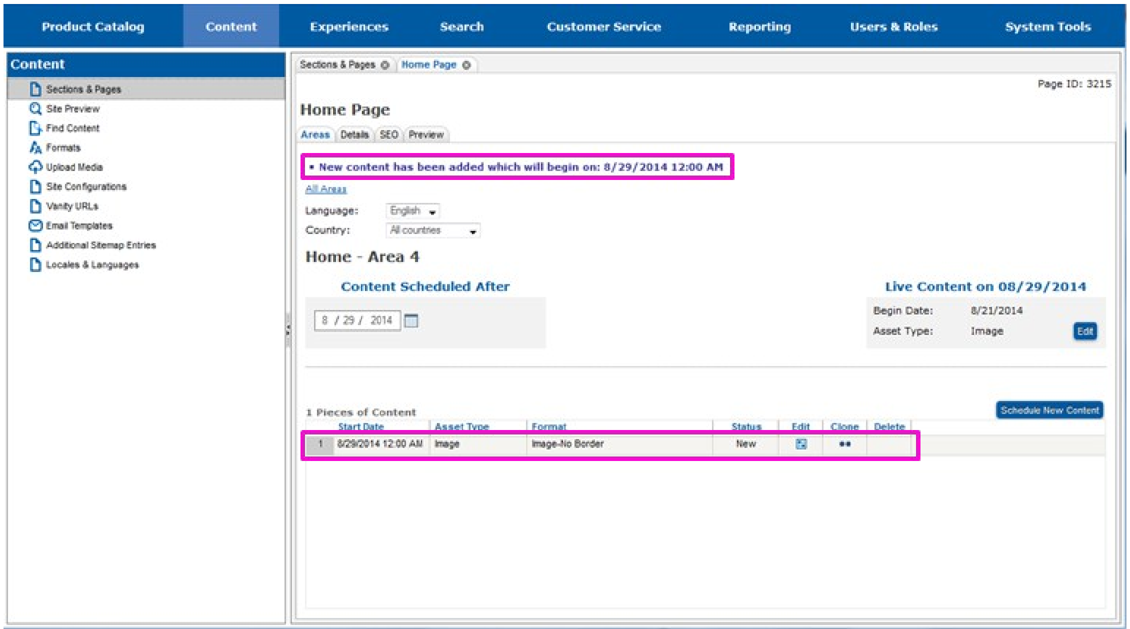
⇒ If there are properties or additional fields that need to be set for the content, enter information for those.



⇨ Select SAVE PROPERTIES when all the information for the content has been entered.



Your content will be saved and the page will redraw. You will see a listing of all of the content that is scheduled to start after the date your new content is scheduled to start. Your content will be included in that list. You will also see a message indicating that your new content has been added.



The content that has been added has a status of NEW. NEW content does not appear on the website until its status has been changed to APPROVED. You can, however, preview the page as it will appear if the content is approved. This will allow you to see if there are any modifications that should be made to the new content and/or the page it will appear on. Continue on to section Preview New Content to preview the content.

See also

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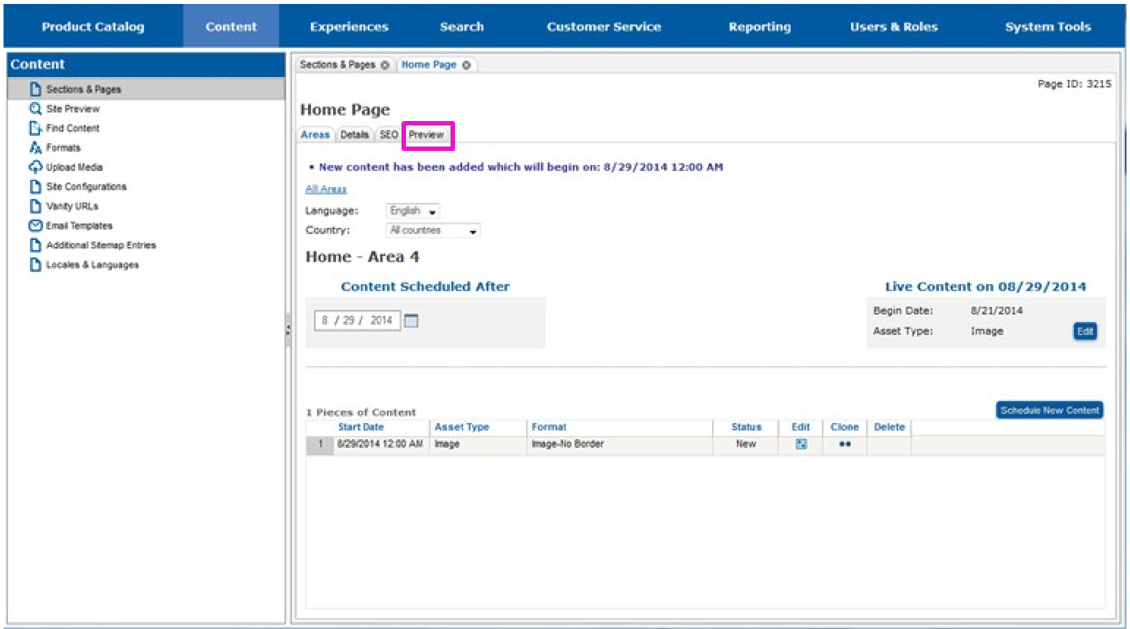
Mark Content Ready for Approval
Approve or Decline Content
View Released Content
Locate Content by Date or Status
Locate Content by Section and Page
Content Statuses

Home > Tutorials > Modifying Content > Preview New Content

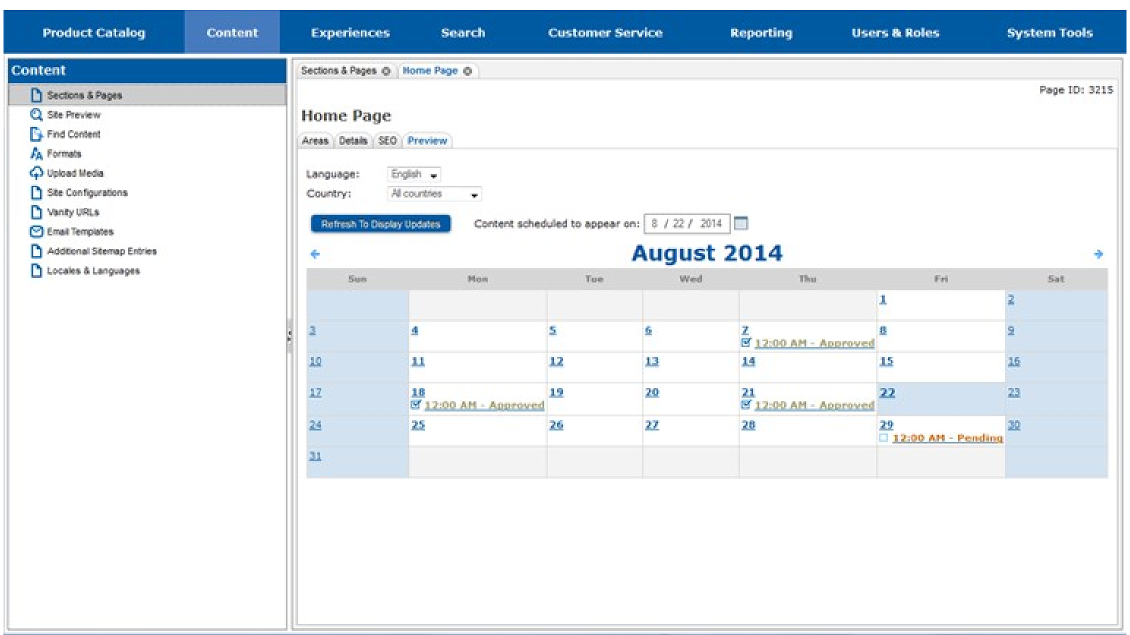
Preview New Content

New content is previewed from the PREVIEW tab for the page the content appears on. If you do not have the page opened and ready for editing, follow the steps in section Locate the Page and Area for New Content before proceeding with this step.

⇨ Select the PREVIEW tab.

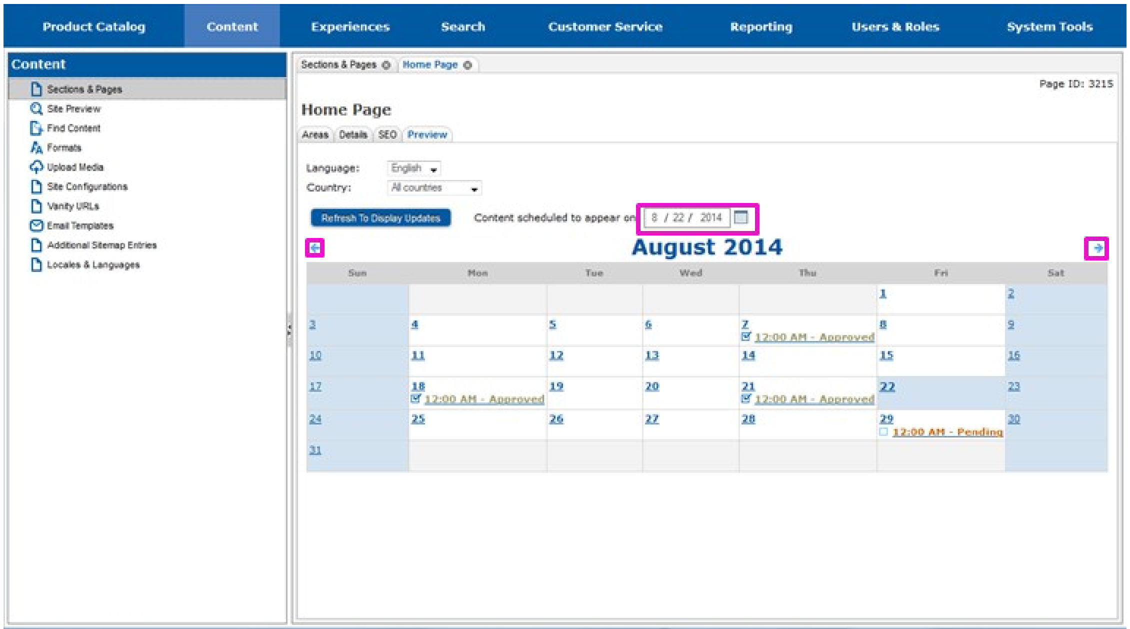


You will see a calendar that shows the days in the current month.



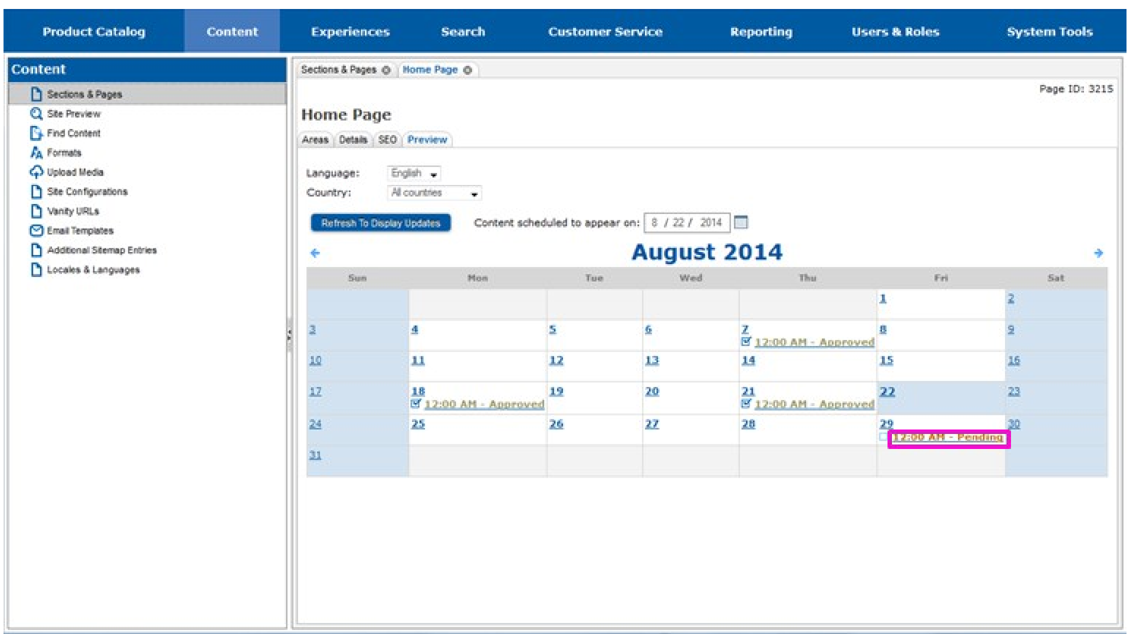
If your new content is not scheduled to appear in the current month, you will need to advance to the month it will appear in.

⇨ Use the calendar controls to advance to the month the content will appear in.

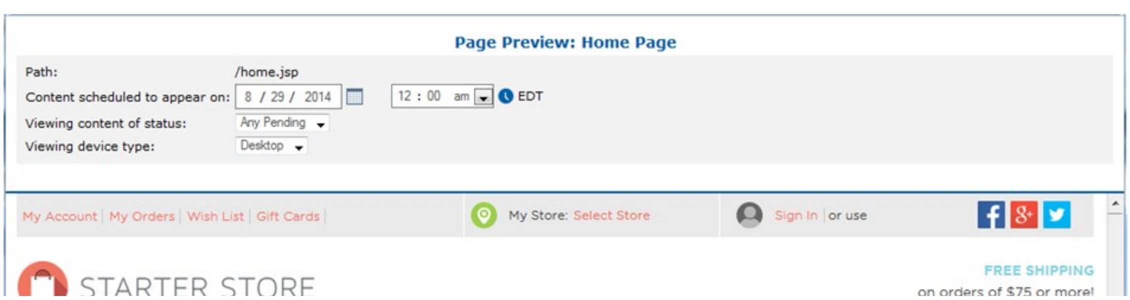


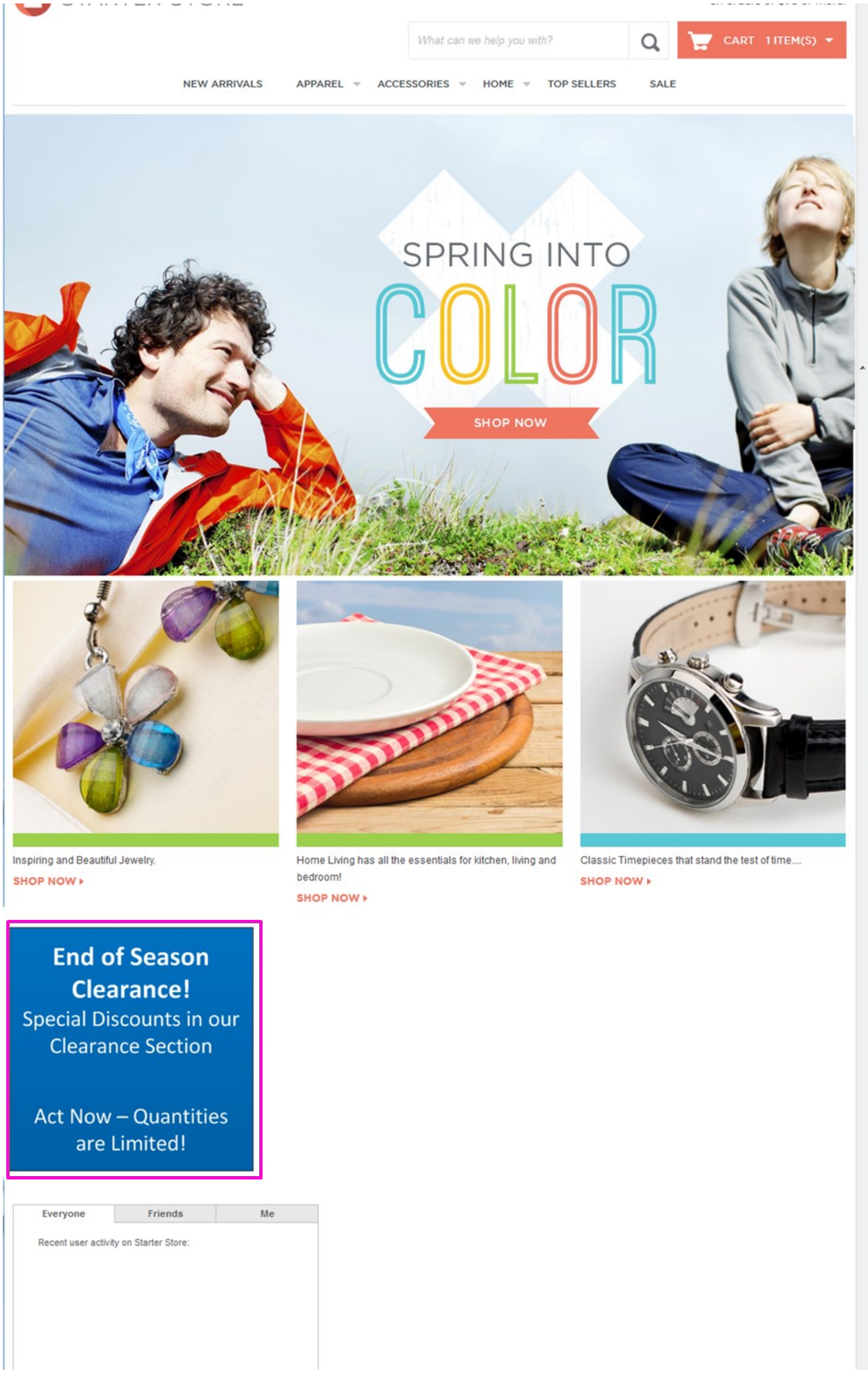
You will see the month your content is scheduled to appear in. On the date it is scheduled to appear, you should see the word PENDING on the calendar. This indicates that there is new content that has been scheduled but not year approved for that date.

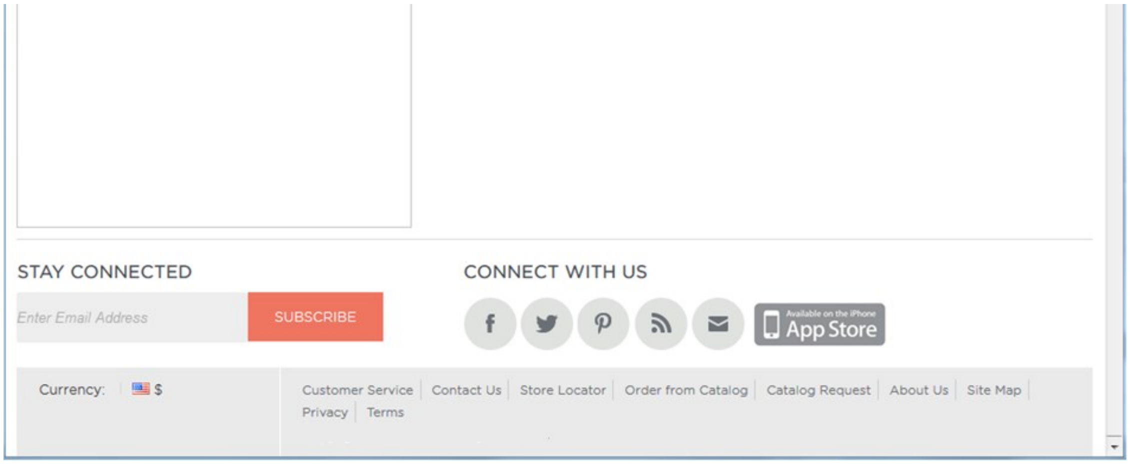
⇨ Select PENDING.



A new window will appear that contains a preview of the page that pending content is scheduled to appear on. You will see all the pending content that is scheduled to appear on the date you selected, so you may see pending content in areas other than the one you scheduled content in.




What can we help you with?
CART 1 ITEM(S)
NEW ARRIVALS
APPAREL
ACCESSORIES
HOME
TOP SELLERS
SALE
SPRING INTO
COLOR
SHOP NOW
Inspiring and Beautiful Jewelry.
SHOP NOW
Home Living has all the essentials for kitchen, living and bedroom!
SHOP NOW
Classic Timepieces that stand the test of time....
SHOP NOW
End of Season Clearance!
Special Discounts in our Clearance Section
Act Now – Quantities are Limited!
Everyone
Friends
Me
Recent user activity on Starter Store:



From this window you can also select a different date to preview, or preview content with a different status.

⇨ Make note of any changes you would like to make to the new content.

⇨ Close the window when you are done viewing the content.

To make changes to the content, continue on to section Edit New Content. If the content is complete and ready for approval, continue on to section Mark Content Ready for Approval.

See also

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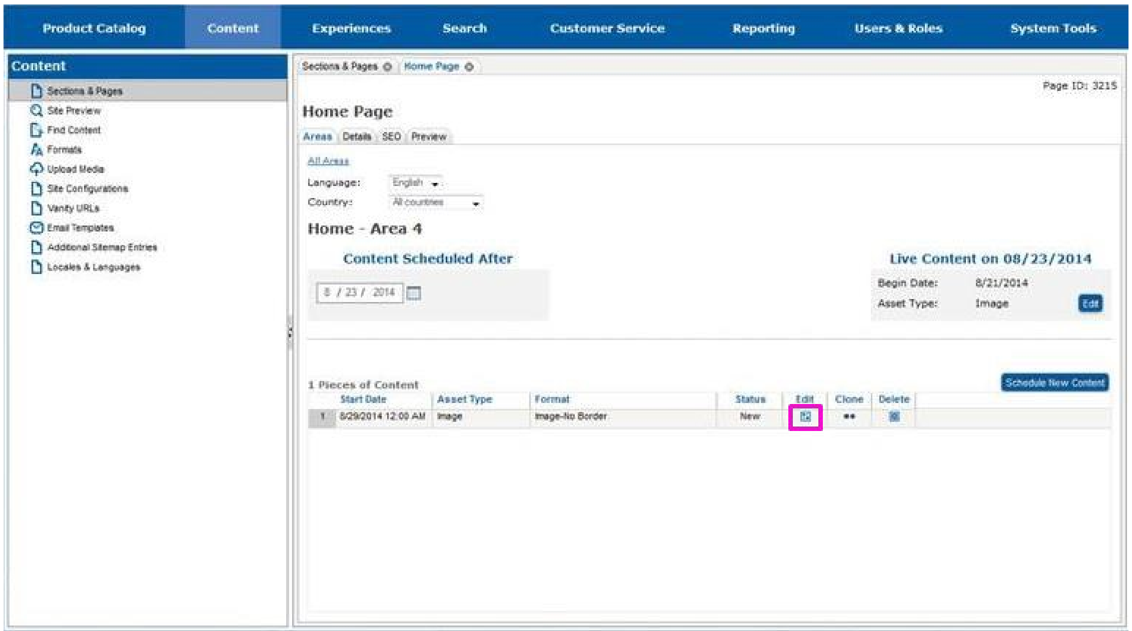
Locate Content by Section and Page
Content Statuses

Home > Tutorials > Modifying Content > Edit New Content

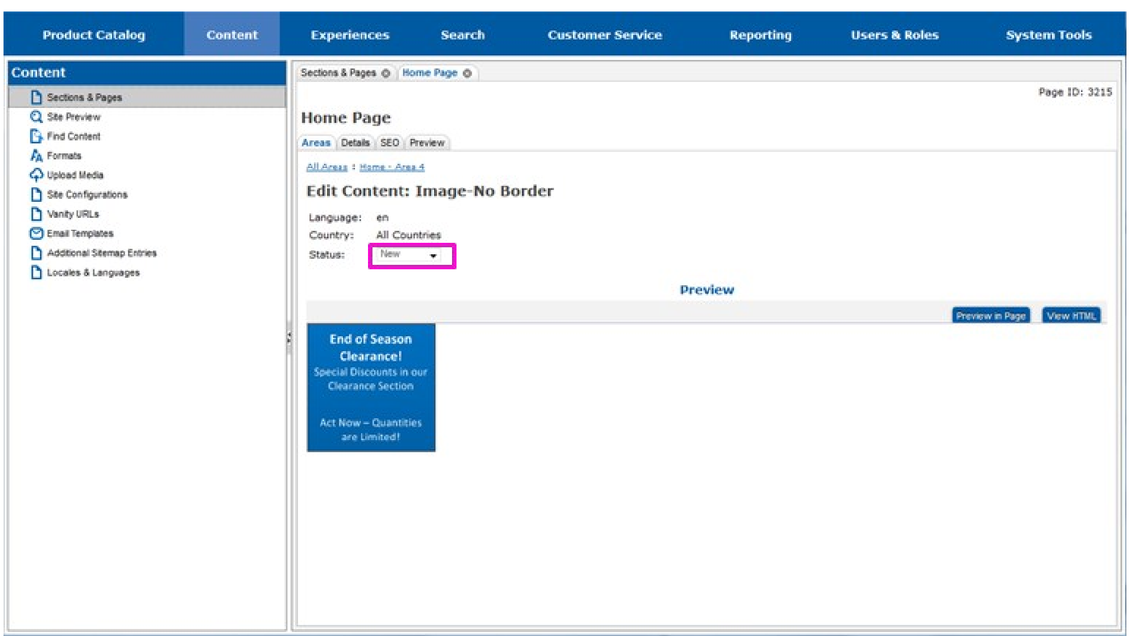
Edit New Content

If you have changes you would like to make to the content, you can make those changes from the AREAS tab for the specific page and area the content appears in. If you are not on the AREAS tab, follow the steps in section Locate the Page and Area for New Content before proceeding with this step.

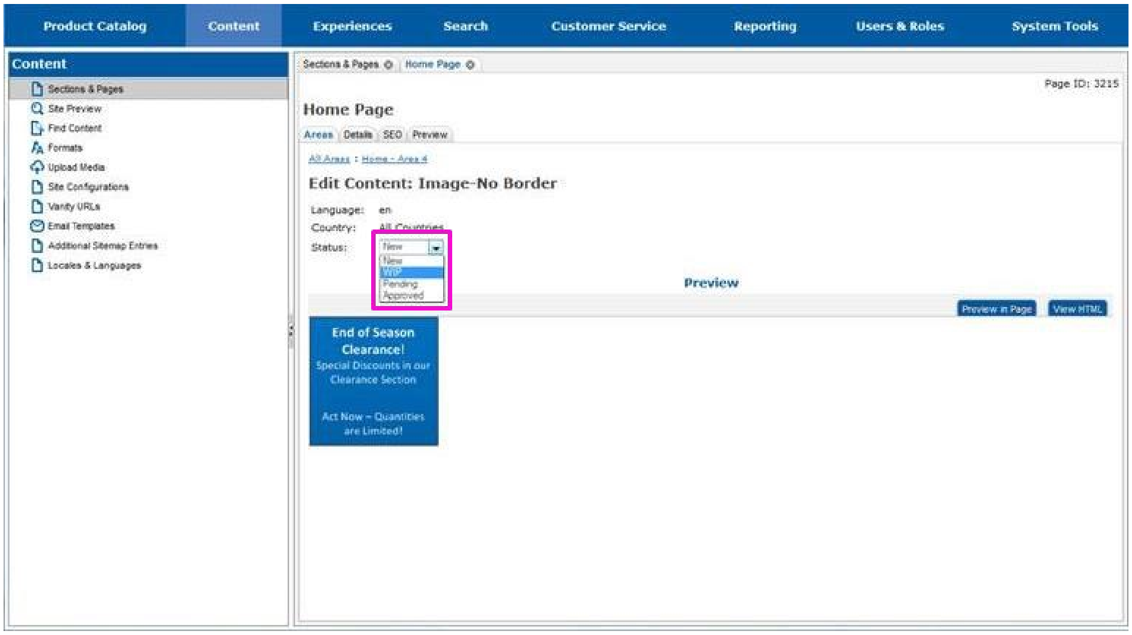
⇨ Select the EDIT icon to the right of the content you are changing.



The page will redraw and you will see the content you added. The content will have a status of NEW. NEW content cannot be edited, so the content must be changed to the WIP (Work In Progress) status. This will indicate to others that you have reserved this content for editing.



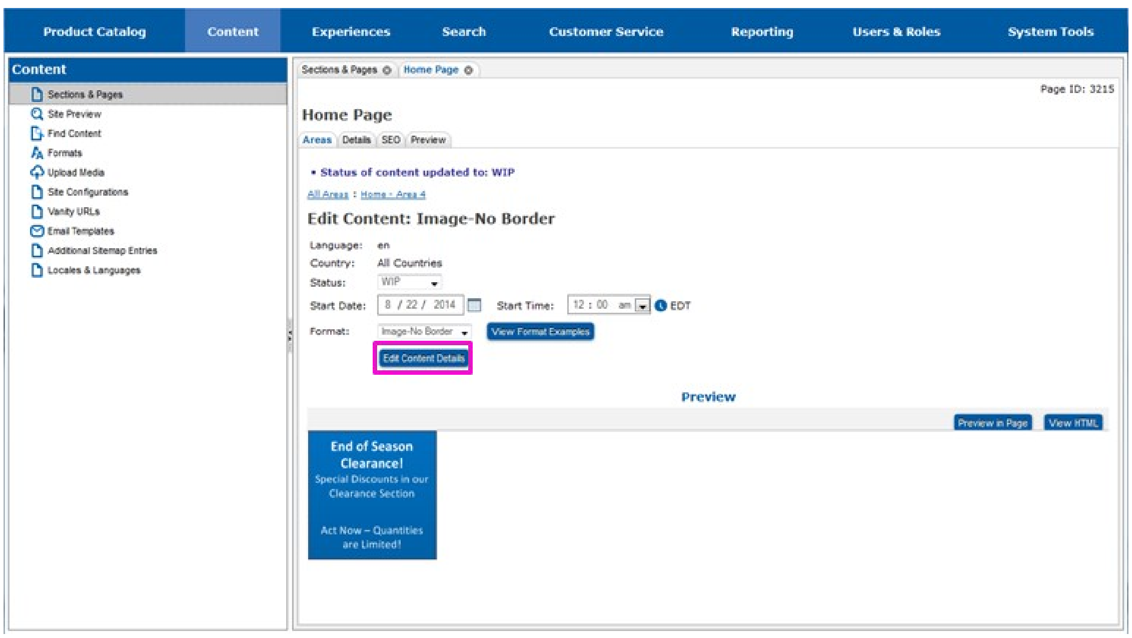
⇨ Using the STATUS drop-down list box, change the status to WIP.



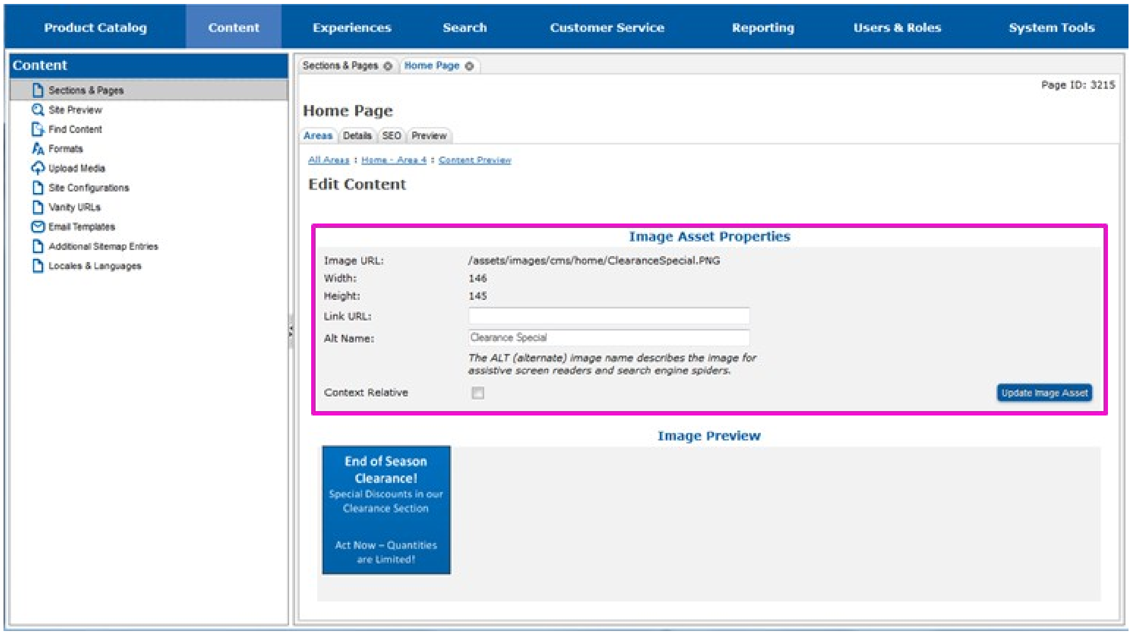
The page will redraw and you will see additional fields that can be used to change the format of your content. These fields will vary, based on the type of content you are adding.

⇒ Use the fields as appropriate to change your content.

⇒ Select EDIT CONTENT DETAILS to make additional changes.

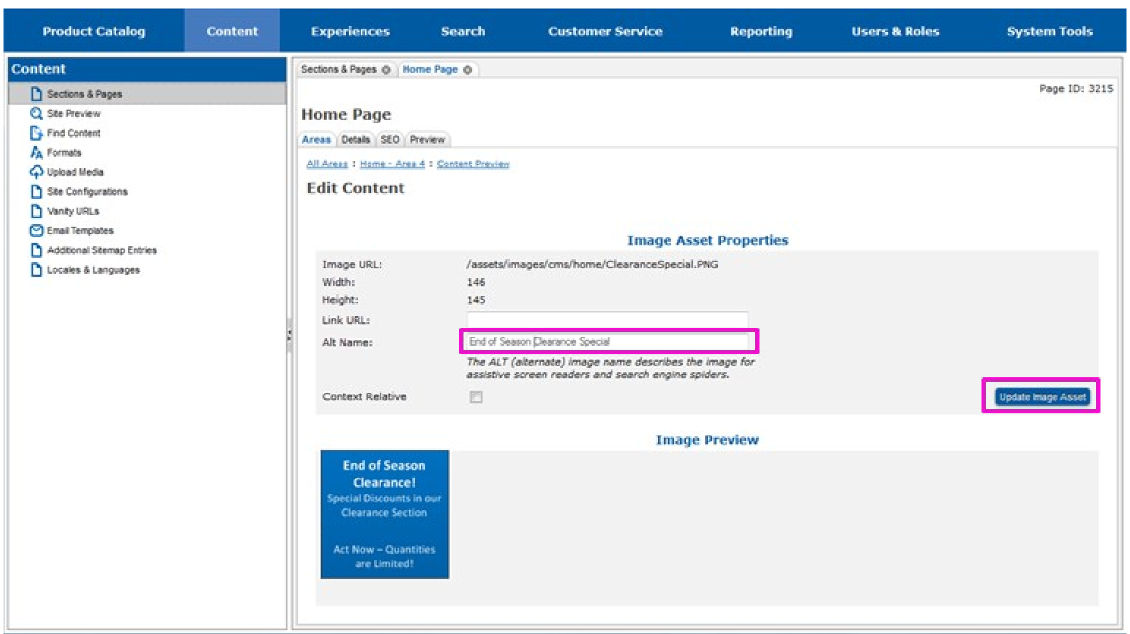


The page will redraw and you will see detailed fields for your content. These fields will vary depending upon the type of content you are editing.

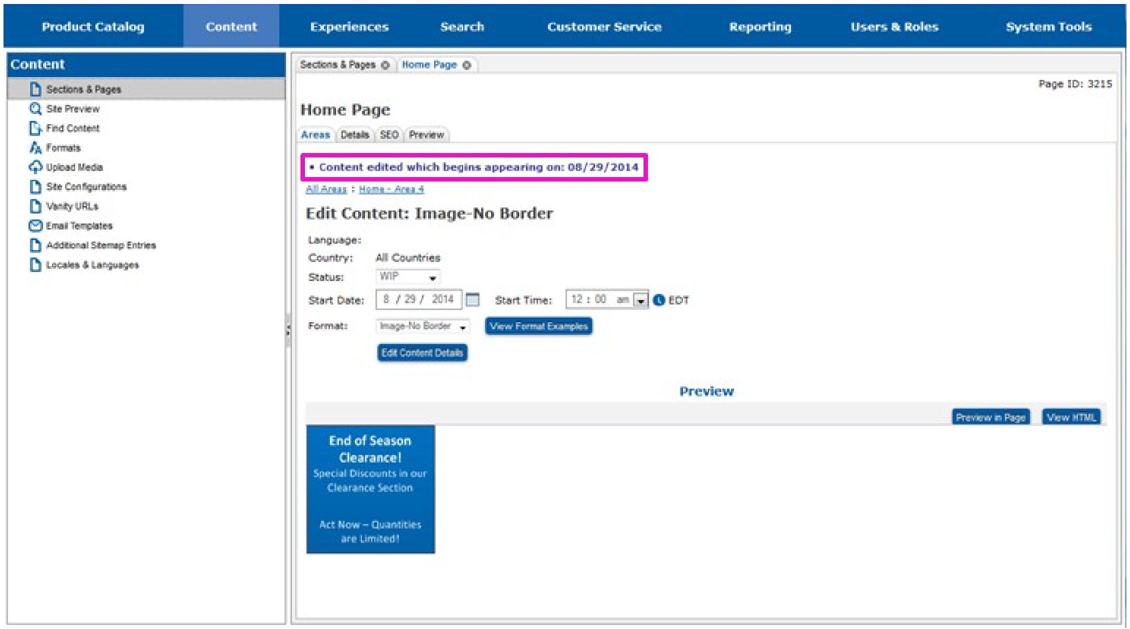


⇒ Use the fields to make changes to your content.

⇒ If available, select the UPDATE or SAVE button to save your changes.



The page will redraw and you will be returned to previous page. You will see a message indicating that your content was edited.



Follow the steps in section Preview New Content to preview your changes. Continue previewing and editing your content until you are satisfied with it. When all the changes to it are complete, continue on to section Mark Content Ready for Approval to mark it ready for approval.

See also

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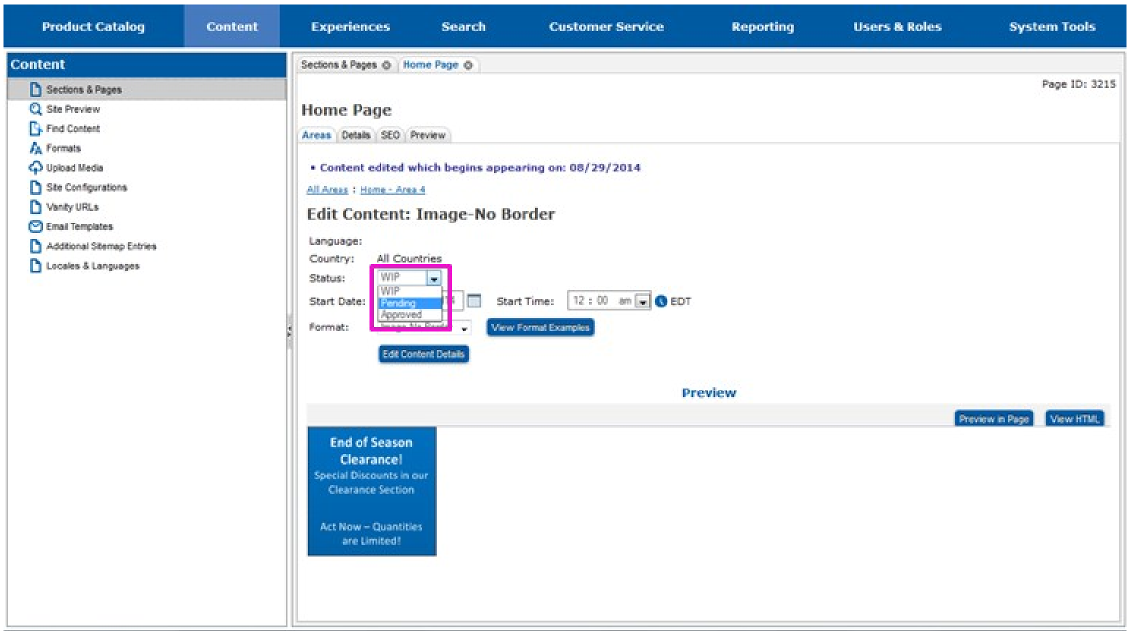
Locate Content by Section and Page
Content Statuses

Home > Tutorials > Modifying Content > Mark Content Ready for Approval

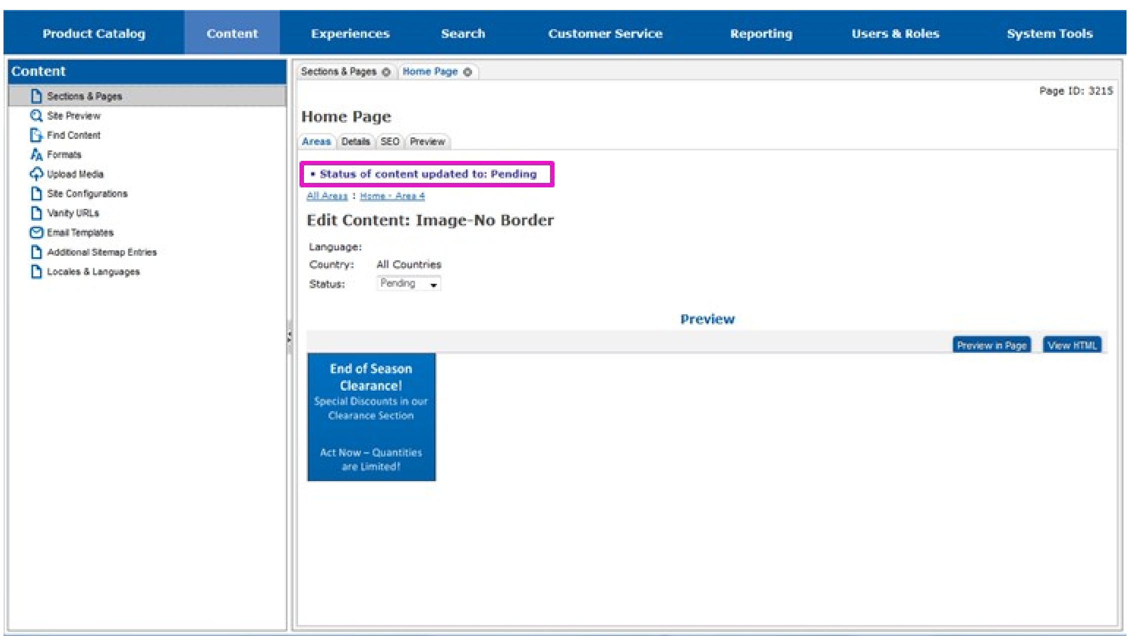
Mark Content Ready for Approval

When you are satisfied with your content, you need to set its status to PENDING to indicate that it is complete and ready for approval to be released. Setting the status is done by editing the content you have entered. If you do not have the content opened and ready for editing, follow the steps in Locate Content by Date or Status or Locate Content by Section and Page to locate and open the content. Once the content is opened for editing, the steps to mark the content as ready for approval are the same regardless of the method you used to locate the content. The example shown here assumes you located the content by following the steps in Locate Content by Section and Page. If you followed the steps in Locate Content by Date and Status, your screen may look slightly different.

⇒ Using the STATUS drop-down, select PENDING.



The page will redraw and you will see a message stating the status is changed to PENDING.



The content is now ready to be approved for publication on the website, or declined for further modifications.

See also

Legal Notices

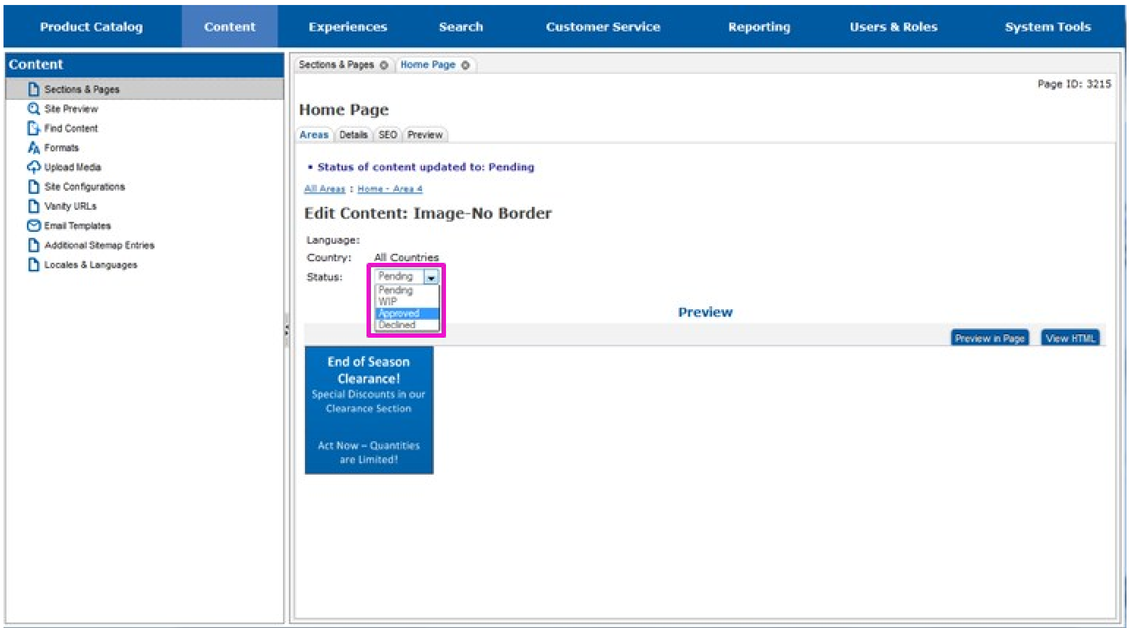
Home > Tutorials > Modifying Content > Approve or Decline Content

Approve or Decline Content

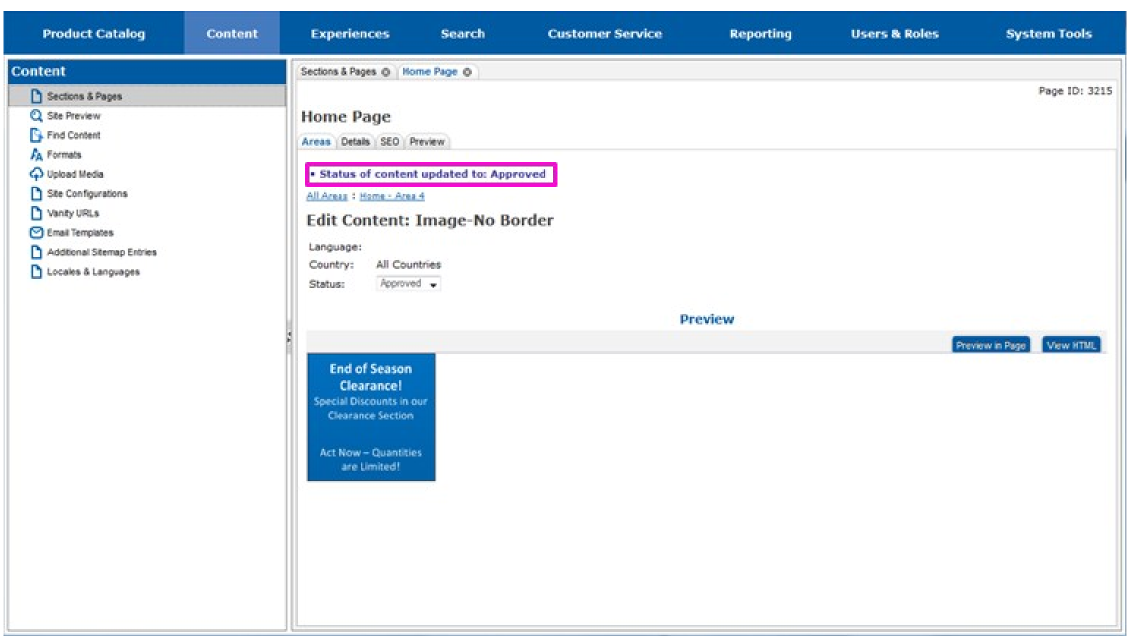
In order to approve or decline content, you must open the content for editing. If you are not currently on a page that shows the content and has a drop-down list for STATUS, follow the steps in Locate Content by Date or Status or Locate Content by Section and Page to locate and open the content for editing. Once the content is opened for editing, the steps to change the status are the same regardless of the method you used to locate the content. The example shown here assumes you located the content by following the steps in section Locate Content by Date or Status. If you followed the steps in section Locate Content by Section and Page, your screen may look slightly different.

Our example will illustrate changing the status of content from PENDING to APPROVED.

⇒ Using the STATUS drop-down list box, change the status to the new status.



The page will redraw and the current status will be the status you chose. You will see a message indicating the status was changed. Depending on the status you selected, you may see additional fields that allow you to edit that content.



See also

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Locate Content by Section and Page
Content Statuses

Home > Tutorials > Modifying Content > View Released Content

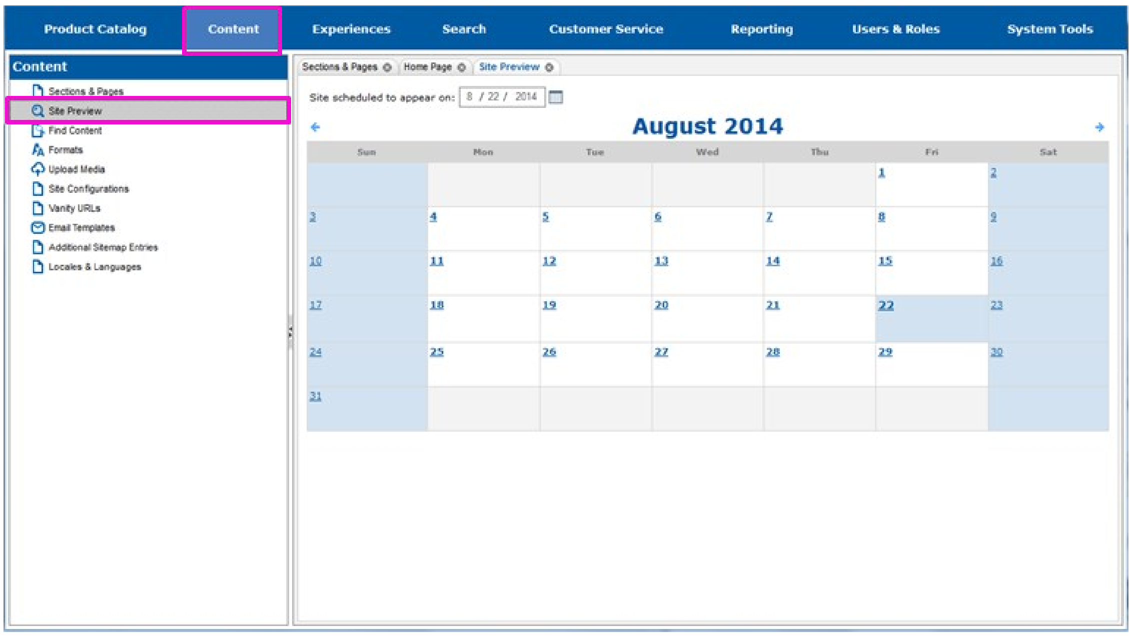
View Released Content

Released content may be viewed at any time through the Site Preview portion of Site Manager.

⇒ Select CONTENT.

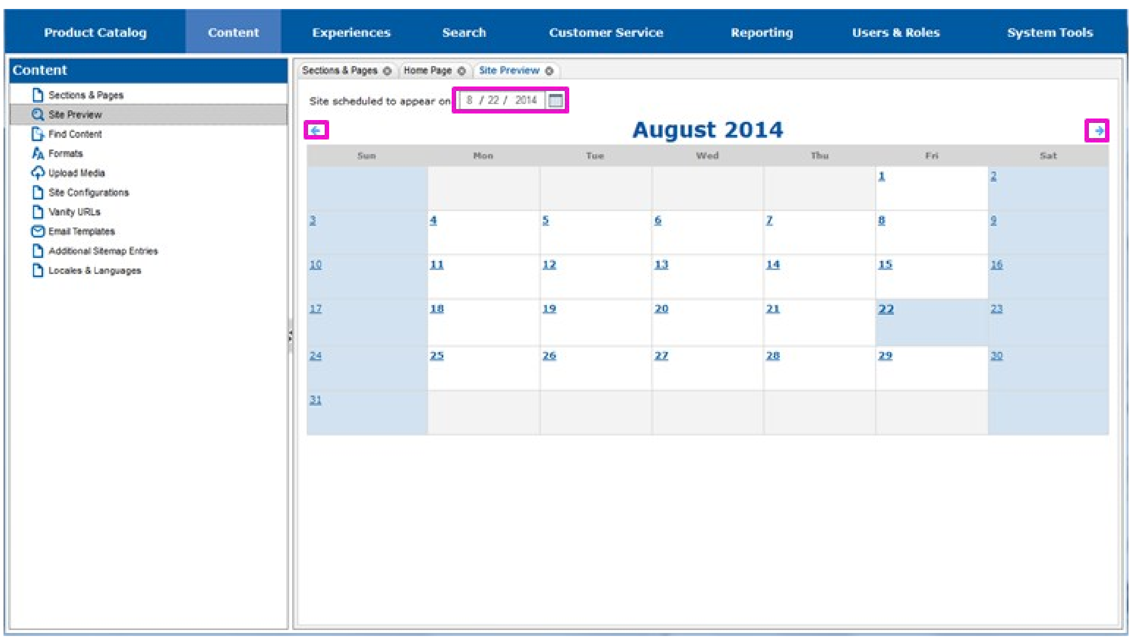
⇒ Select SITE PREVIEW.

You will see a calendar for the current month.



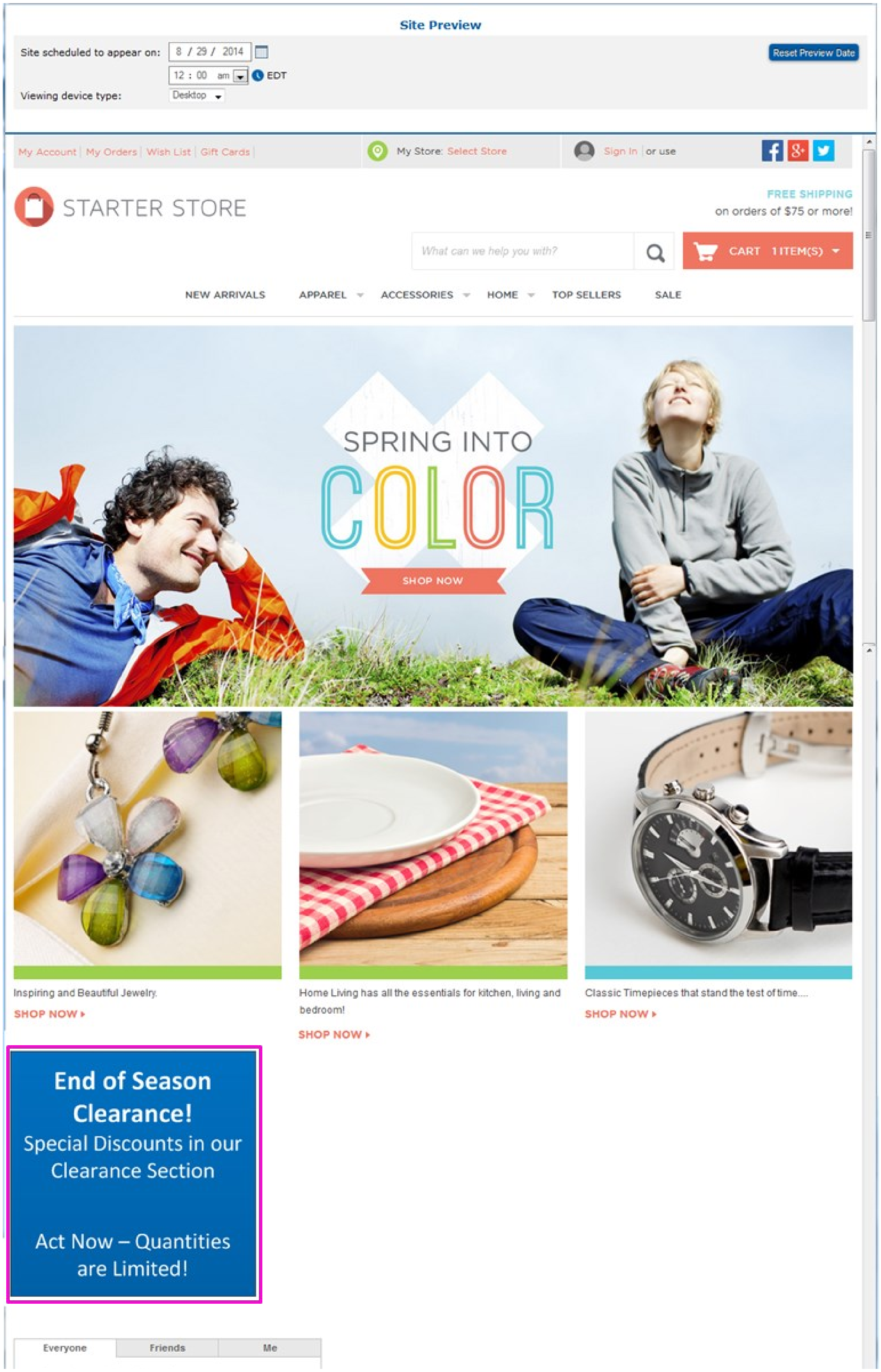
If you wish to view the site as it will appear in a different month, you need to change to that month.

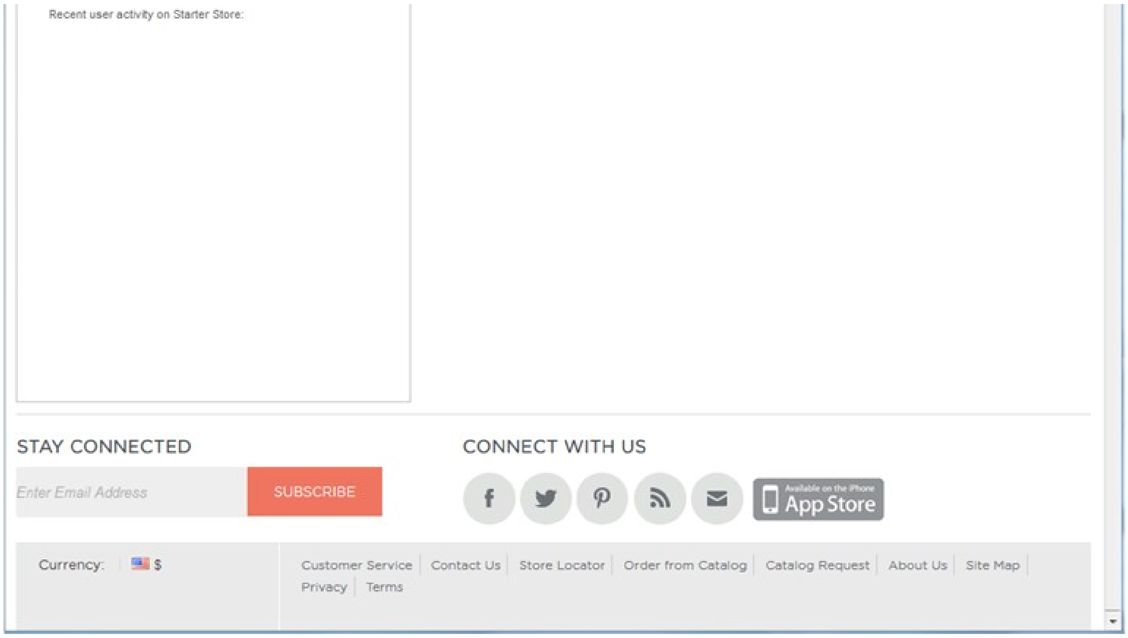
⇒ Use the calendar controls to change to the month you want to preview.



⇒ Select the date you wish to preview.

A new window will appear that shows the website as it is currently scheduled to appear on that date.


Site Preview
Site scheduled to appear on: 8 / 29 / 2014
12 : 00 am EDT
Viewing device type: Desktop
Reset Preview Date
My Account | My Orders | Wish List | Gift Cards
My Store: Select Store
Sign In | or use
STARTER STORE
FREE SHIPPING
on orders of $75 or more!
What can we help you with?
CART 1 ITEM(S)
NEW ARRIVALS
APPAREL
ACCESSORIES
HOME
TOP SELLERS
SALE
SPRING INTO
COLOR
SHOP NOW
Inspiring and Beautiful Jewelry.
SHOP NOW
Home Living has all the essentials for kitchen, living and bedroom!
SHOP NOW
Classic Timepieces that stand the test of time....
SHOP NOW
End of Season Clearance!
Special Discounts in our Clearance Section
Act Now – Quantities are Limited!
Everyone
Friends
Me



You may select items and interact with the site in the same manner that you do with the live site.

See also

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Locate Content by Date or Status
Locate Content by Section and Page
Content Statuses

Home > Tutorials > Modifying Content > Locate Content by Date or Status

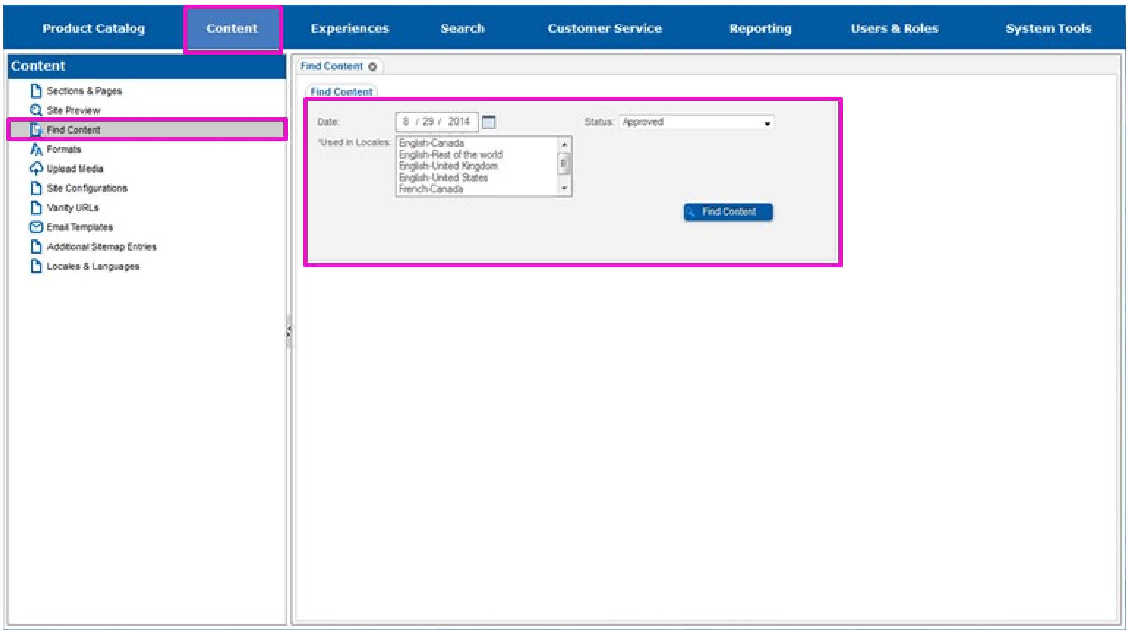
Locate Content by Date or Status

Content may be located by the date it is scheduled to start on or its current status by using the FIND CONTENT portion of Site Manager.

⇒ Select CONTENT.

⇒ Select FIND CONTENT.

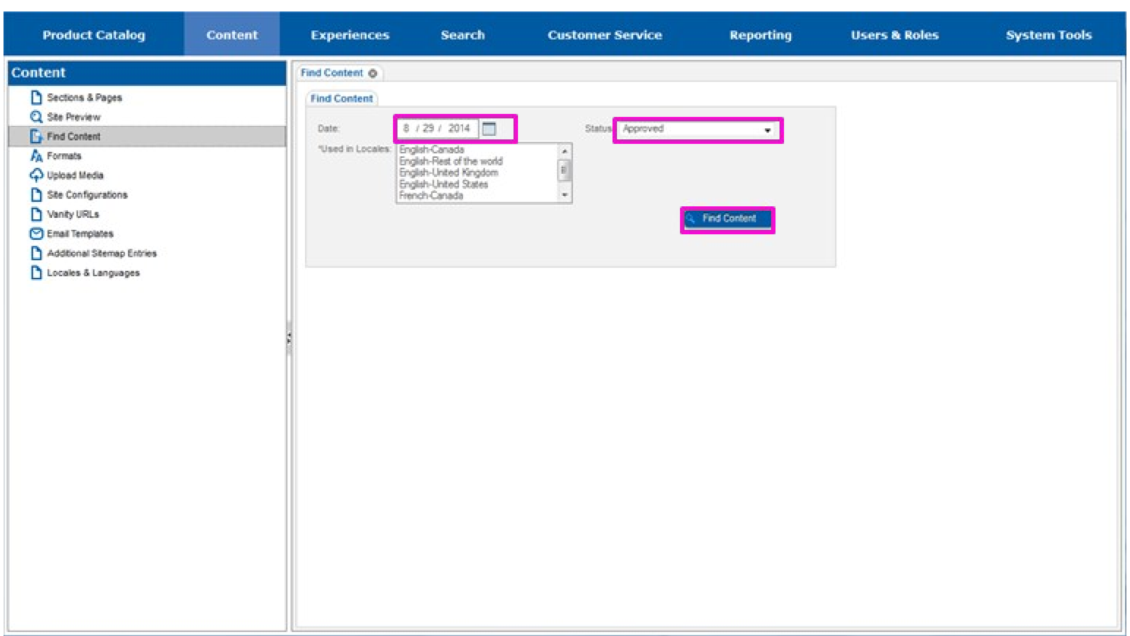
You will see fields that allow you to find content based on the date it starts on, based on its current status, or both.



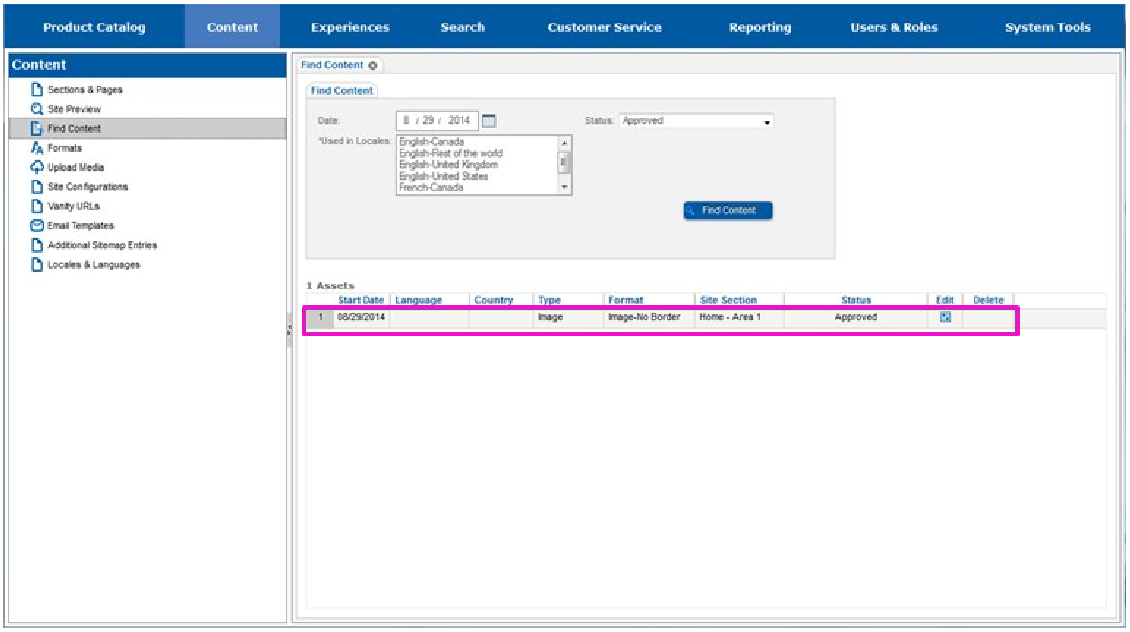
⇒ If you know the date the content will start on, enter the date in the Date field or use the calendar icon to select the date.

⇒ If you know the current status of the content, select the status in the Status drop-down list box.

⇒ Select FIND CONTENT.

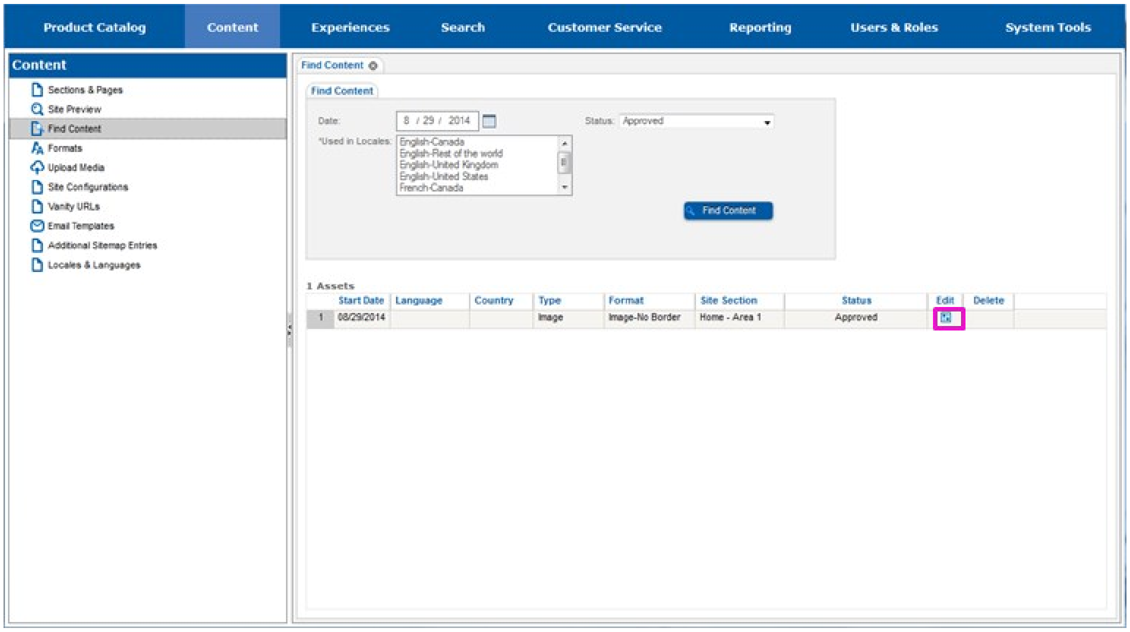


The page will redraw and you will see a list of all of the content that matched the search criteria you entered.



You can edit content from this page.

⇒ Select the EDIT icon to the right of the content you want to edit.



The page will redraw and you will be able to edit the content.

See also

Before You Begin
The Example Used
Working with Content
Upload New Media
Locate the Page and Area for New Content
Schedule New Content
Preview New Content
Edit New Content
Mark Content Ready for Approval
Approve or Decline Content

View Released Content
Locate Content by Section and Page
Content Statuses

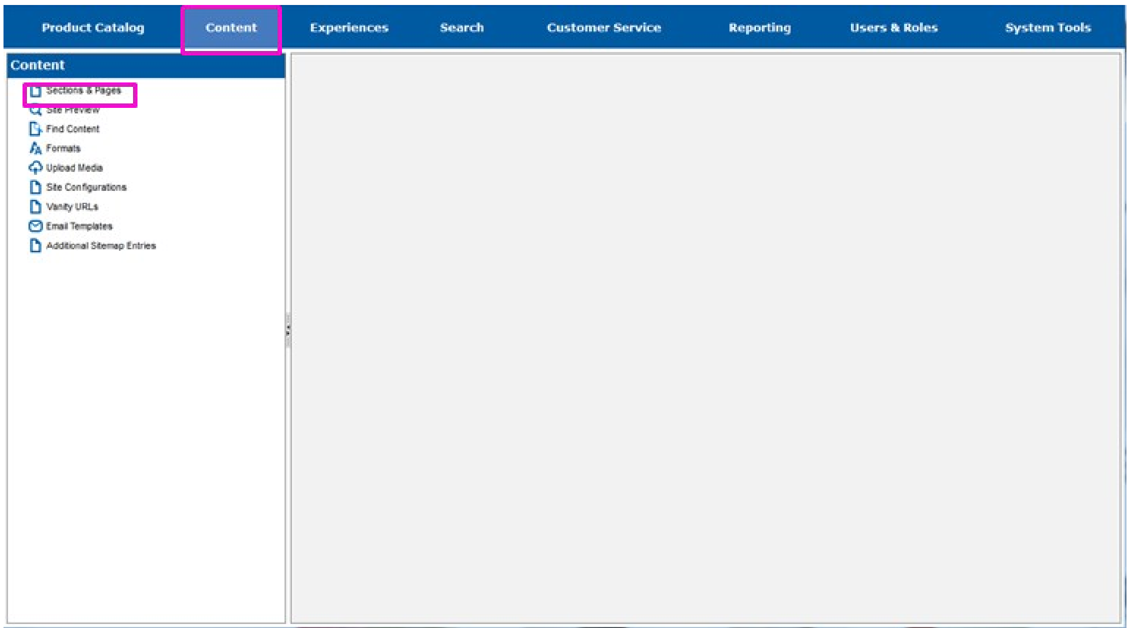
Home > Tutorials > Modifying Content > Locate Content by Section and Page

Locate Content by Section and Page

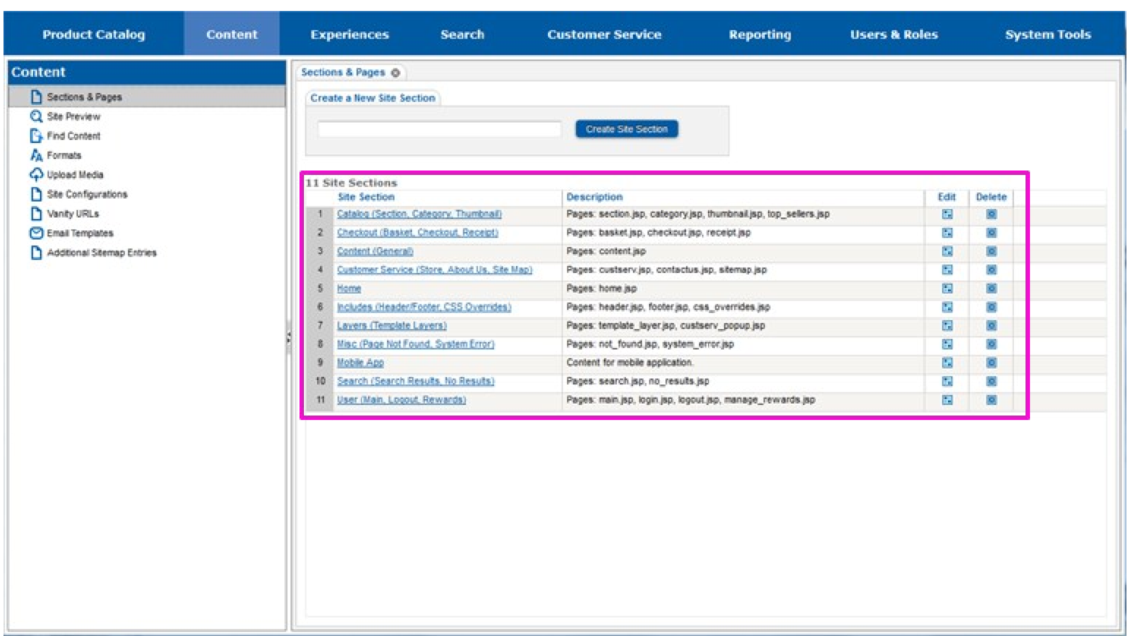
Content can be located by the page and section it appears on by using the SECTIONS & PAGES portion of the Site Manager.

⇨ Select CONTENT.

⇨ Select SECTIONS & PAGES.

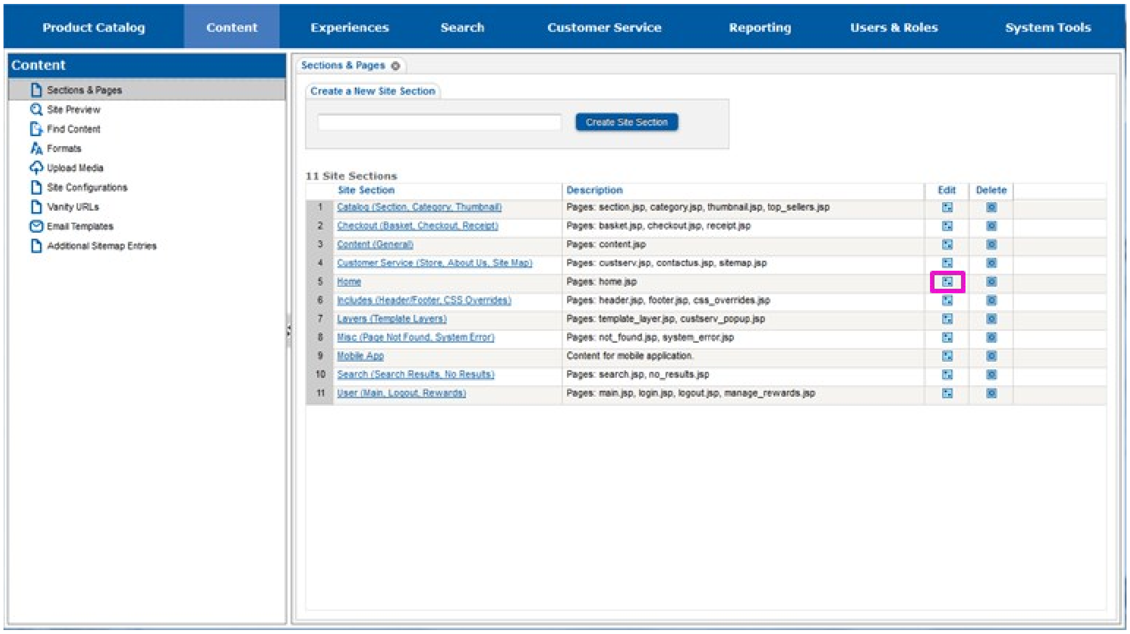


The page will redraw and you will see a list of all of the sections defined for the website.



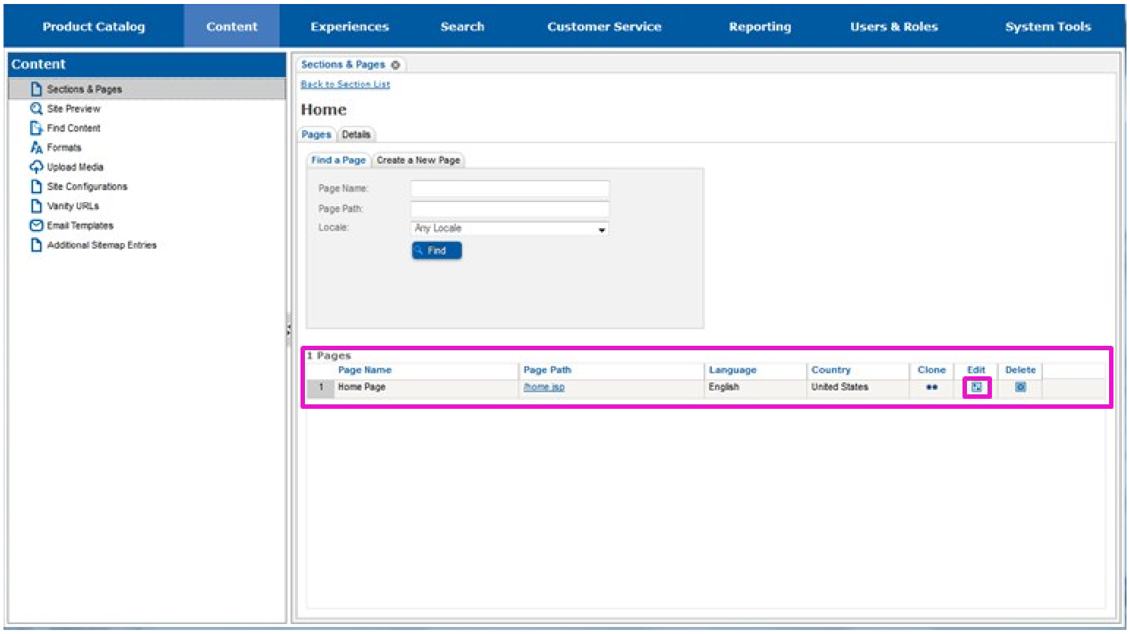
You will edit the section that contains the page that you wish to find content on.

⇨ Select the EDIT icon to the right of the section containing the page you wish to find content on.

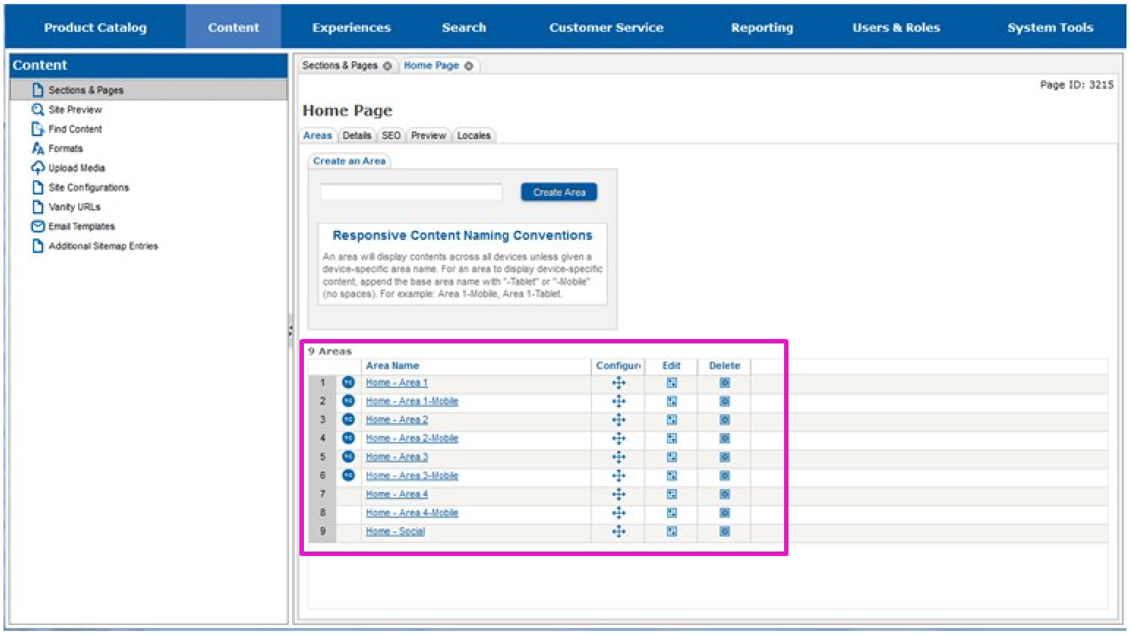


The page will redraw and you will see the list of pages in the section at the bottom of the page. You will edit the page that you want to find content on.

⇨ Select the EDIT icon to the right of the page that you want to find content on.

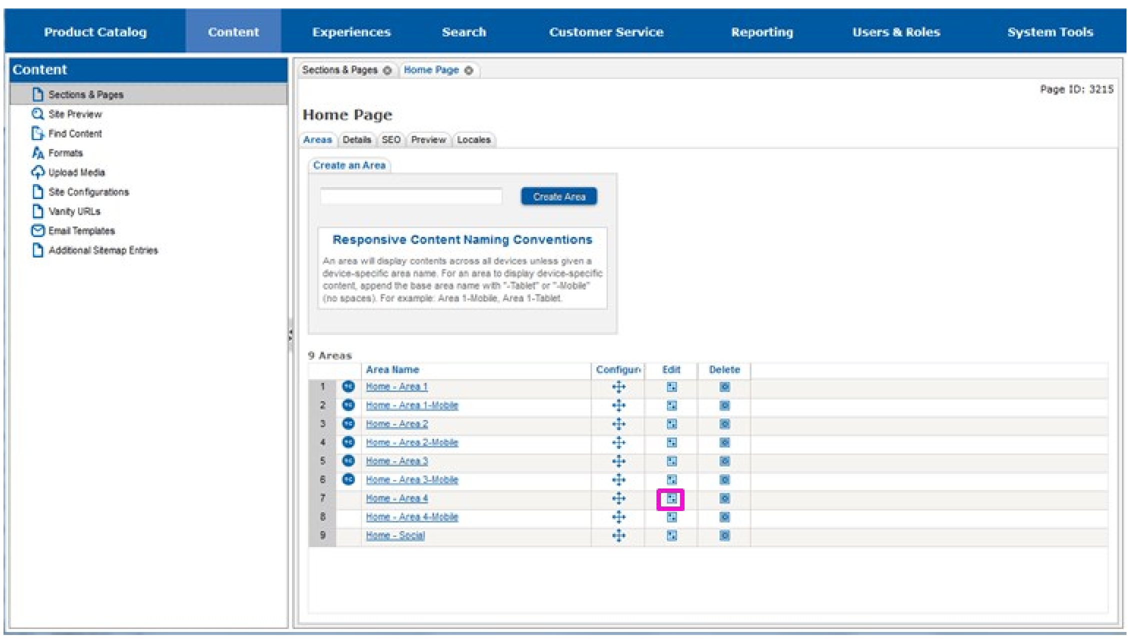


A new tab opens for the page you are editing. You will see the name of your page as the title of the tab. The tab contains a listing of the areas on the page.

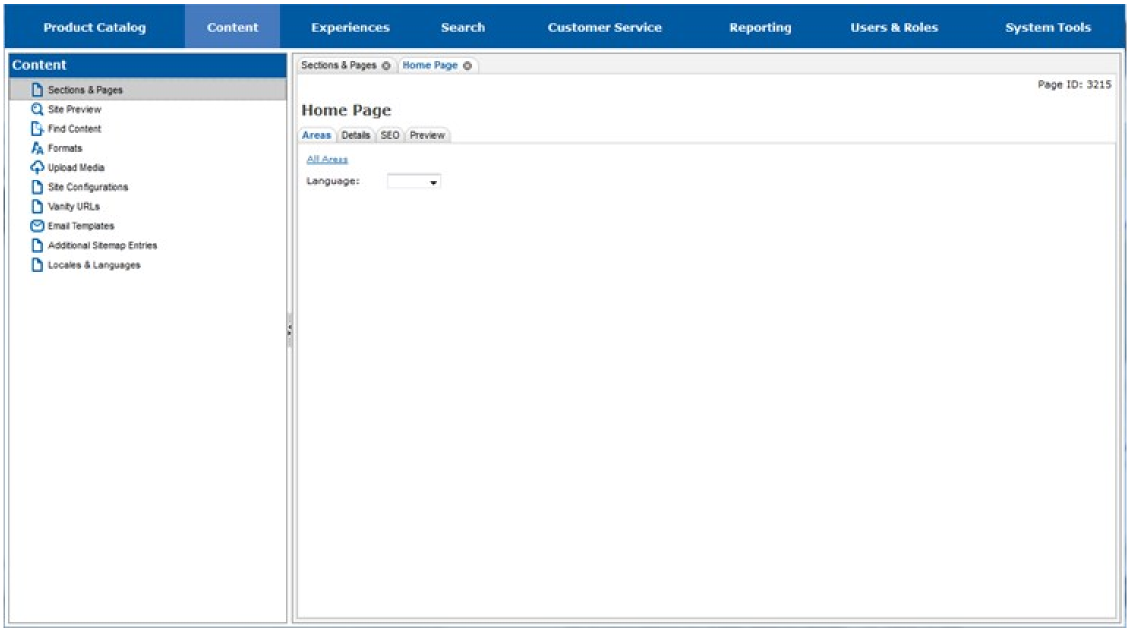


You will edit the area that you want to find content on.

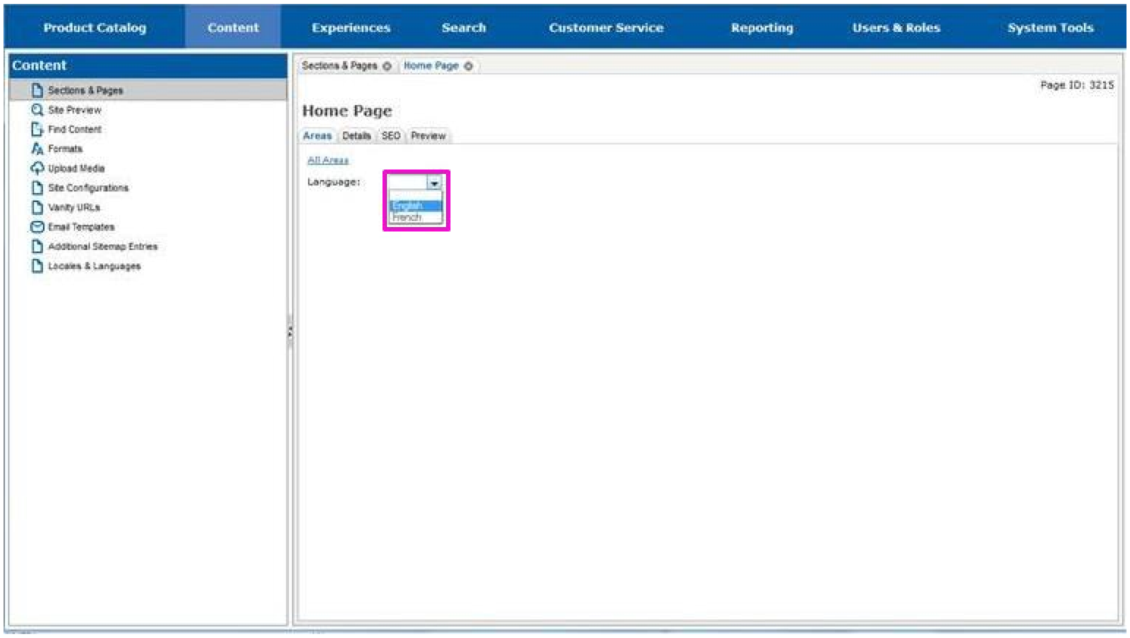
⇒ Select the EDIT icon to the right of the area that you want to find content on.



The page will redraw. If you have an international site, you will see a drop-down box to select the language that the new content applies to. You will need to select a language and a country for the new content.



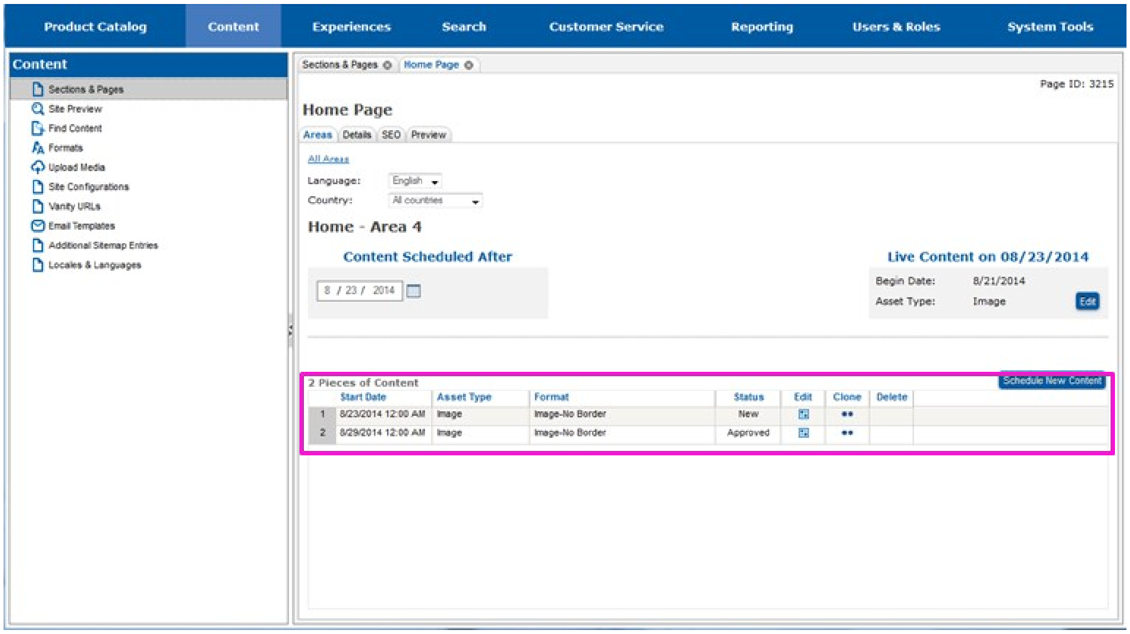
⇨ Select the LANGUAGE of the new content.



The page will redraw and the country selection box will appear. You will also see the content scheduled for the default country.

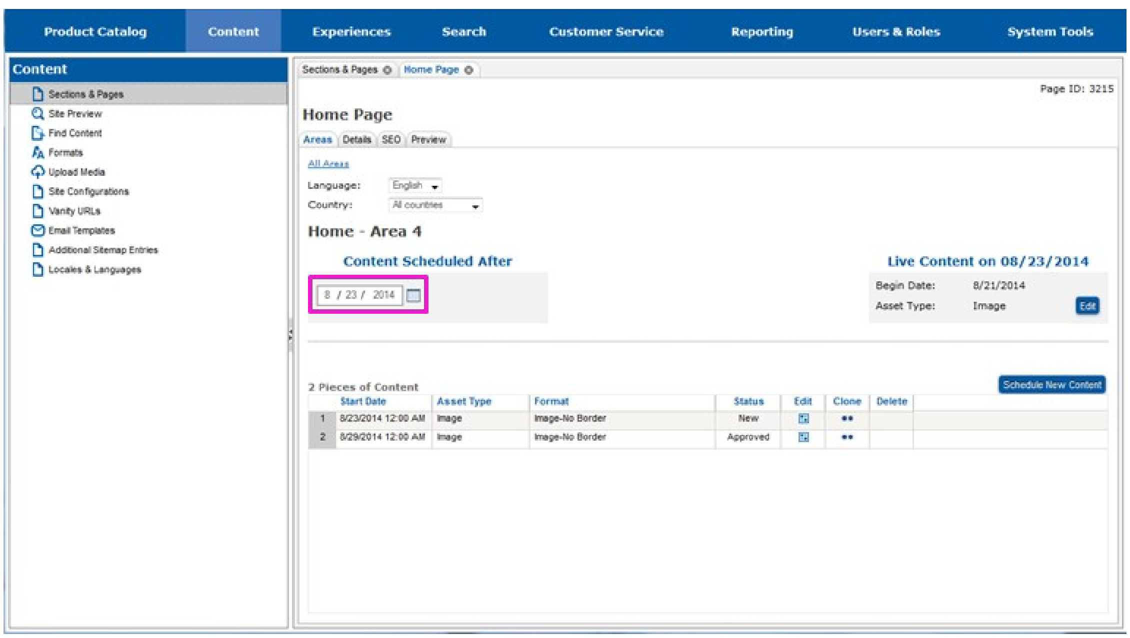
⇨ Select the COUNTRY the new content applies to.

The page will redraw and you will see a list of all of the content scheduled to start after the current date.



If you do not see the content you are looking for, use the CONTENT SCHEDULED AFTER date to enter an earlier date.

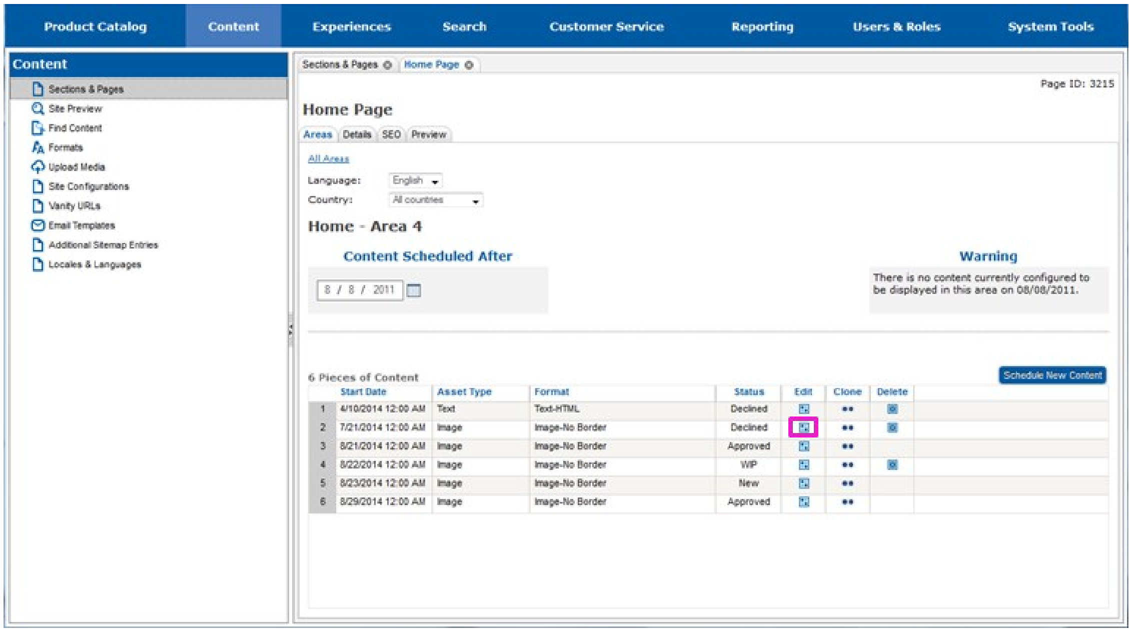
⇒ Enter a date in the CONTENT SCHEDULED AFTER field, or use the calendar icon to select a date.



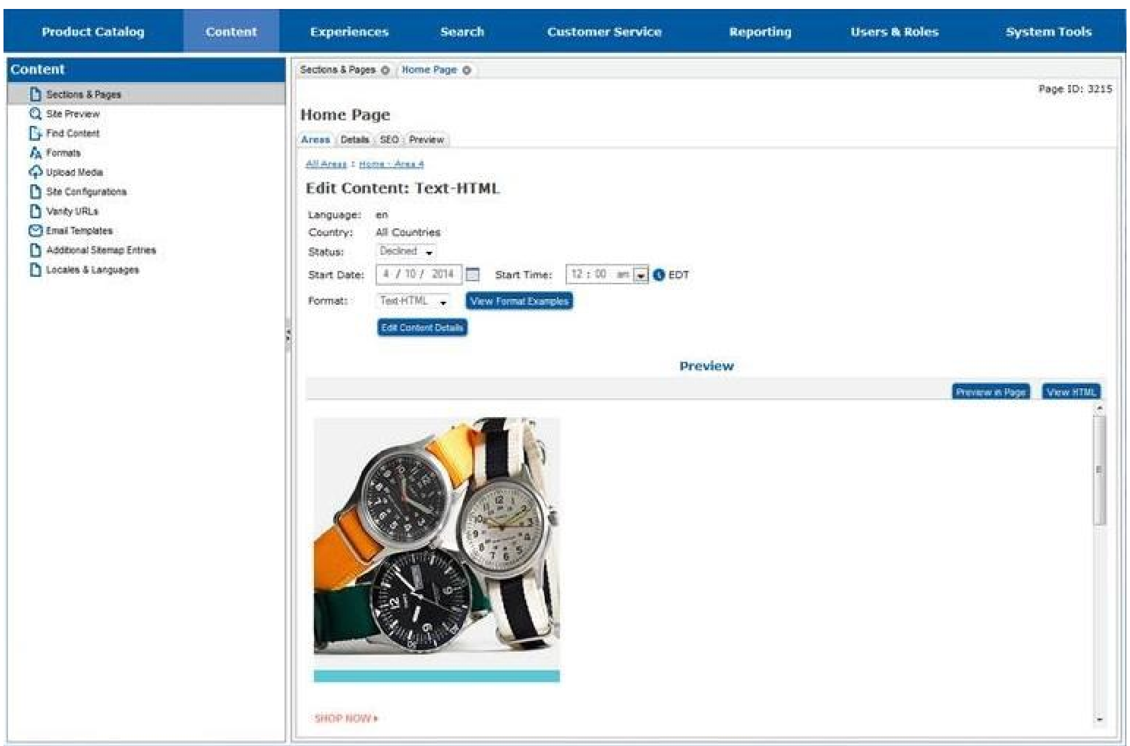
The page will redraw and you will see a list of all of the content that is scheduled to start after the date you entered.

You can edit content from this page.

⇒ Select the EDIT icon to the right of the content you want to edit.



The page will redraw and you will be able to edit the content.



See also

[Before You Begin](#)
[The Example Used](#)
[Working with Content](#)
[Upload New Media](#)
[Locate the Page and Area for New Content](#)
[Schedule New Content](#)
[Preview New Content](#)
[Edit New Content](#)
[Mark Content Ready for Approval](#)
[Approve or Decline Content](#)
[View Released Content](#)

Locate Content by Date or Status
Content Statuses

Legal Notices

Content Statuses

Current Status	Possible New Status
NEW	• WIP - indicates that someone has reserved this piece of content to work on. • PENDING - indicates the content has been put on hold for approval.
WORK IN PROGRESS ("WIP")	• PENDING - indicates the content has been put on hold for approval. • APPROVED - allows the content to be added to the Web site.
PENDING (AWAITING APPROVAL)	• WIP - indicates that someone has reserved this piece of content to work on. • APPROVED - allows the content to be added to the Web site. • DECLINED - indicates the content needs to have further work done prior to approval. Changing the status to Declined does not delete the content.
APPROVED	• DECLINED - Changing the status to Declined does not delete the content, but does remove it from the Web site if it is live.
DECLINED	• WIP - indicates the content needs to have further work done prior to approval. • PENDING- indicates the content has been put on hold for approval.

See also

Before You Begin
The Example Used
Working with Content
Upload New Media
Locate the Page and Area for New Content
Schedule New Content
Preview New Content
Edit New Content
Mark Content Ready for Approval
Approve or Decline Content
View Released Content
Locate Content by Date or Status
Locate Content by Section and Page

Home > Tutorials > Working With Stores

Working With Stores

This tutorial describes how to add a new store and a new store event to a website.

Stores are added so that they can be displayed in store locator maps so that customers may find them. Adding new stores to store locator maps helps increase the customer traffic at those stores.

Store events are special activities or sales that will be taking place in a store. Highlighting and publicizing those events help increase the number of customers visiting the store.

Conventions Used in this Tutorial

SMALL CAPS: Items that appear in small caps refer to text items on the application. If you are viewing the application, you should see a label, menu, or button with the same text on it.

⇒: Arrows appear at the beginning of areas that contain a task you should perform. When you see the arrow, you should perform the described task.

: Pink outline boxes are used to highlight areas of screenshots that are being referred to in the text. These are used to call attention to a particular area of the screen, but you will not see those boxes on your screen when you are using the application.

Articles in this section

- Before You Begin
- The Examples Used
- Work With a Store
- Add a Store
- Add a Store Event
- Add a Store Image
- Add a Store Notification
- Modify SEO Data
- View New Items on a Store Detail Page

See also

Adding Products To Categories
Adding Synonyms to the Thesaurus
Creating an Experience for a Promotion
Creating an Experience for an A/B Test
Creating Dynamic Attributes
Creating New Products
Modifying Content

Legal Notices

Before You Begin

New stores and store events are added using the Site Manager. Before you begin adding stores or store events, you should:

- Have a valid Site Manager log in and know how to access the Site Manager;
- Know how to navigate the Site Manager and find various sections in it;
- Be logged in to the Site Manager;
- If you are adding a store, know the name of the store you want to add;
- If you are adding a store, know the address of the store you want to add;
- If you are adding a store, know if the store should be activated immediately;
- Optional - If you are adding a store, know the hours of the store you want to add.
- If you are adding a store event, know the store(s) you will be adding the event to;
- If you are adding a store event, know the description of the store event and how you would like to format it.

See also

The Examples Used
Work With a Store
Add a Store
Add a Store Event
Add a Store Image
Add a Store Notification
Modify SEO Data
View New Items on a Store Detail Page

The Examples Used

The examples used in this tutorial illustrate adding a new store to the list of stores for a website, and adding a new event to one of the stores. The address of the store is known, but not its latitude and longitude. Those will be calculated so that the store can be added to the map of stores. The store should be immediately available on the website. For the event, the description of the event contains some simple formatting and the event is also to appear on the website immediately.

See also

Before You Begin
Work With a Store
Add a Store
Add a Store Event
Add a Store Image
Add a Store Notification
Modify SEO Data
View New Items on a Store Detail Page

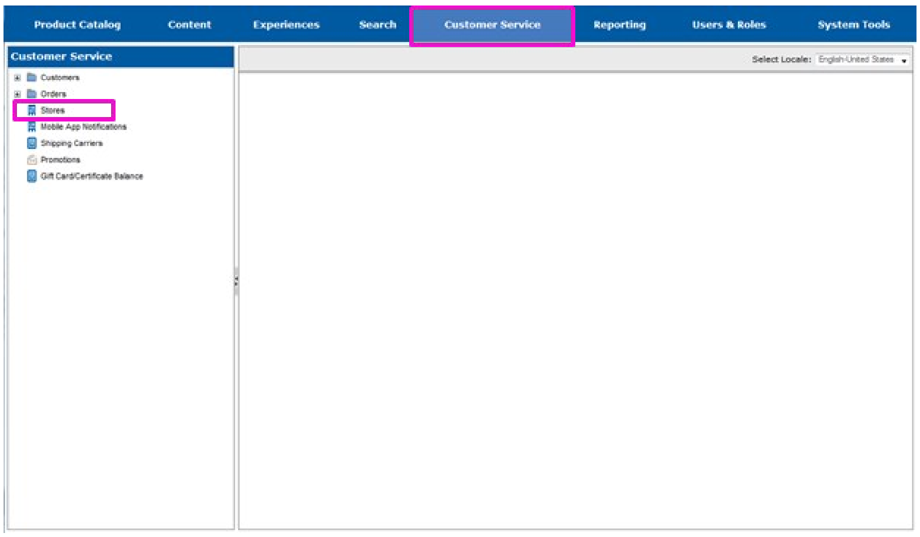
Home > Tutorials > Working With Stores > Work With a Store

Work With a Store

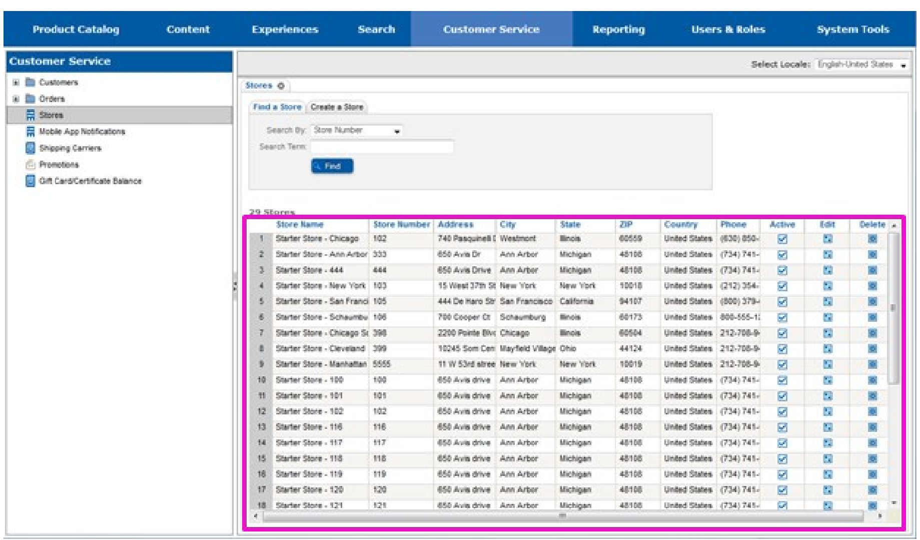
Stores and store events are managed in the CUSTOMER SERVICE portion of the Site Manager. You will be working in the CUSTOMER SERVICE portion for all of the sections in this tutorial.

⇒ Select CUSTOMER SERVICE.

⇒ Select STORES.



The right-hand portion of the page will redraw and you will see a list of all the stores currently defined for the site.



If you are adding a new store, proceed to section ***Add a Store*** . If you are adding a store event, proceed to section ***Add a Store Event***.

See also

Before You Begin
The Examples Used
Add a Store
Add a Store Event
Add a Store Image
Add a Store Notification
Modify SEO Data
View New Items on a Store Detail Page

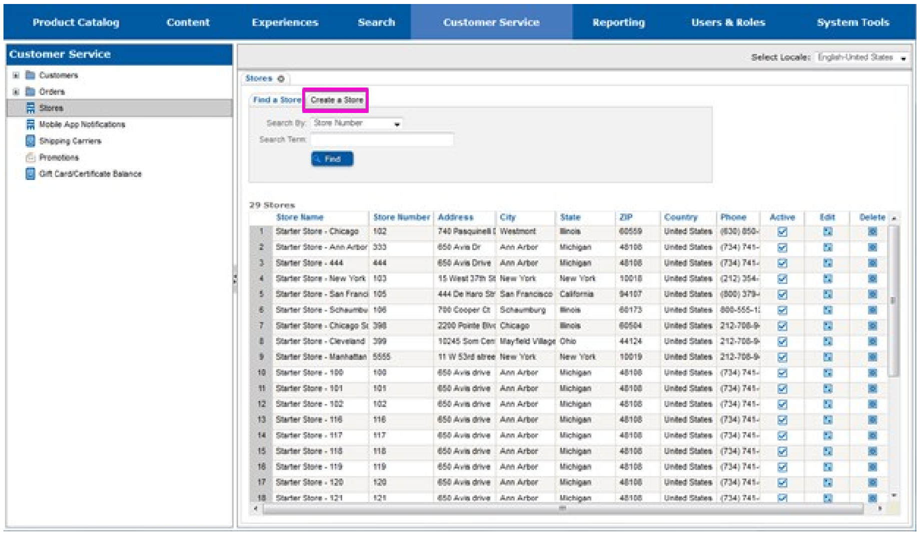
Home > Tutorials > Working With Stores > Add a Store

Add a Store

To complete these steps, you will need to be in the CUSTOMER SERVICE -> STORES portion of the Site Manager. If you are unsure where that section is, see ***Work With a Store***.

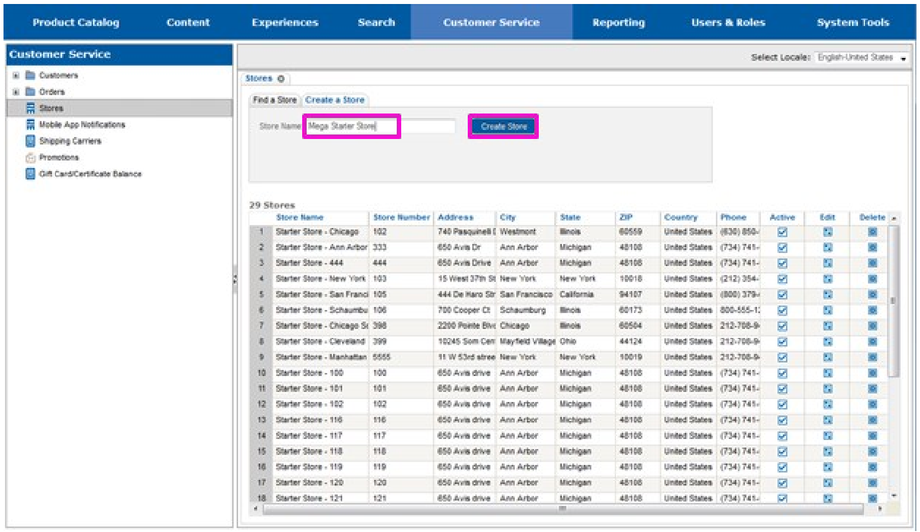
At the top of the page is a tab labeled CREATE A STORE.

⇨ Select the CREATE A STORE tab.

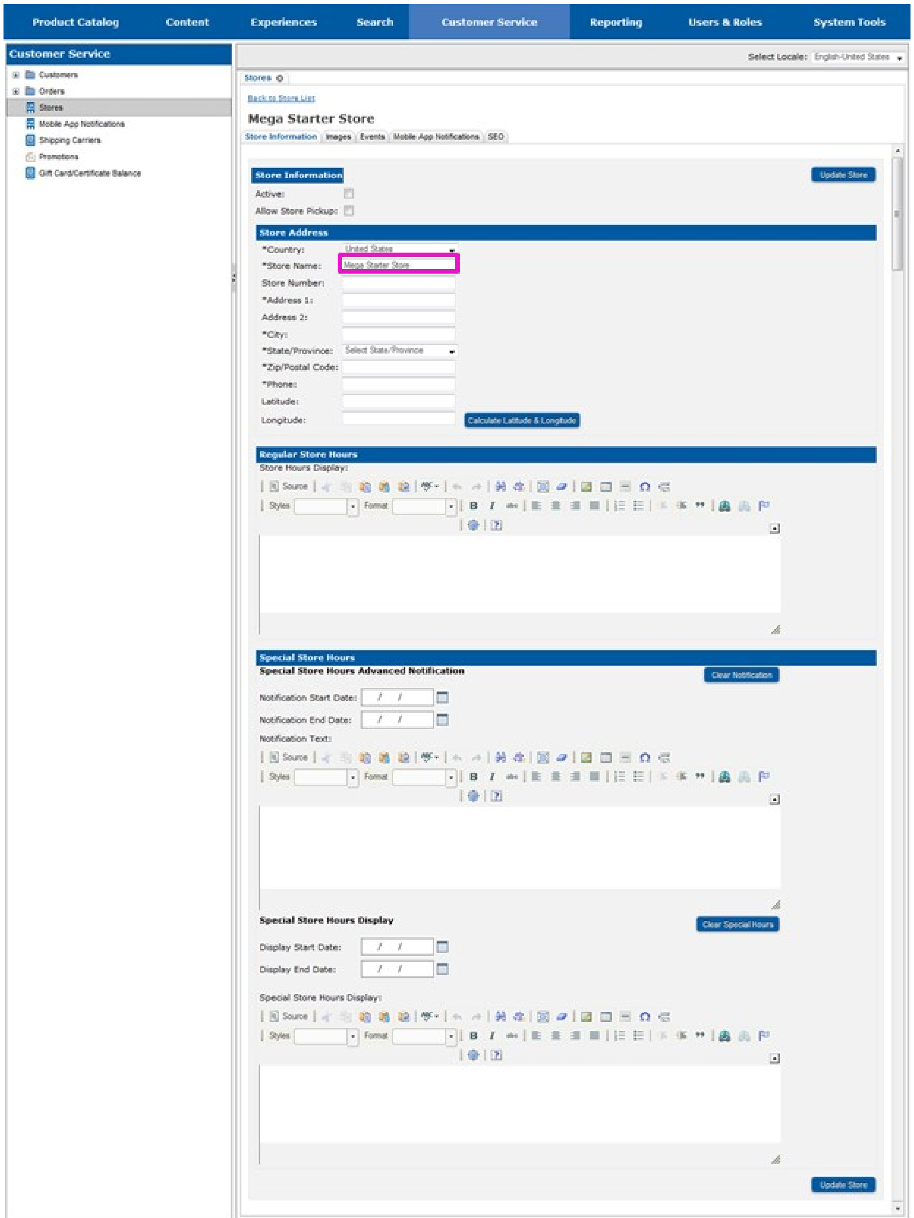


⇨ Enter the name of your store in STORE NAME.

⇨ Select CREATE STORE.



The page will redraw and you will see a number of fields for entering specific information about your store. The store name you entered will be in the STORE NAME field.



⇒ Select the ACTIVE checkbox if the store is to be immediately available on the web site.

⇒ Select ALLOW STORE PICKUPS if the store supports in-store pickup of items. (This field is available only when the site is integrated with Locate.)

⇒ Select the country where the store is located with the COUNTRY drop-down list box.

⇒ If the store has a number associated with it, enter it in STORE NUMBER.

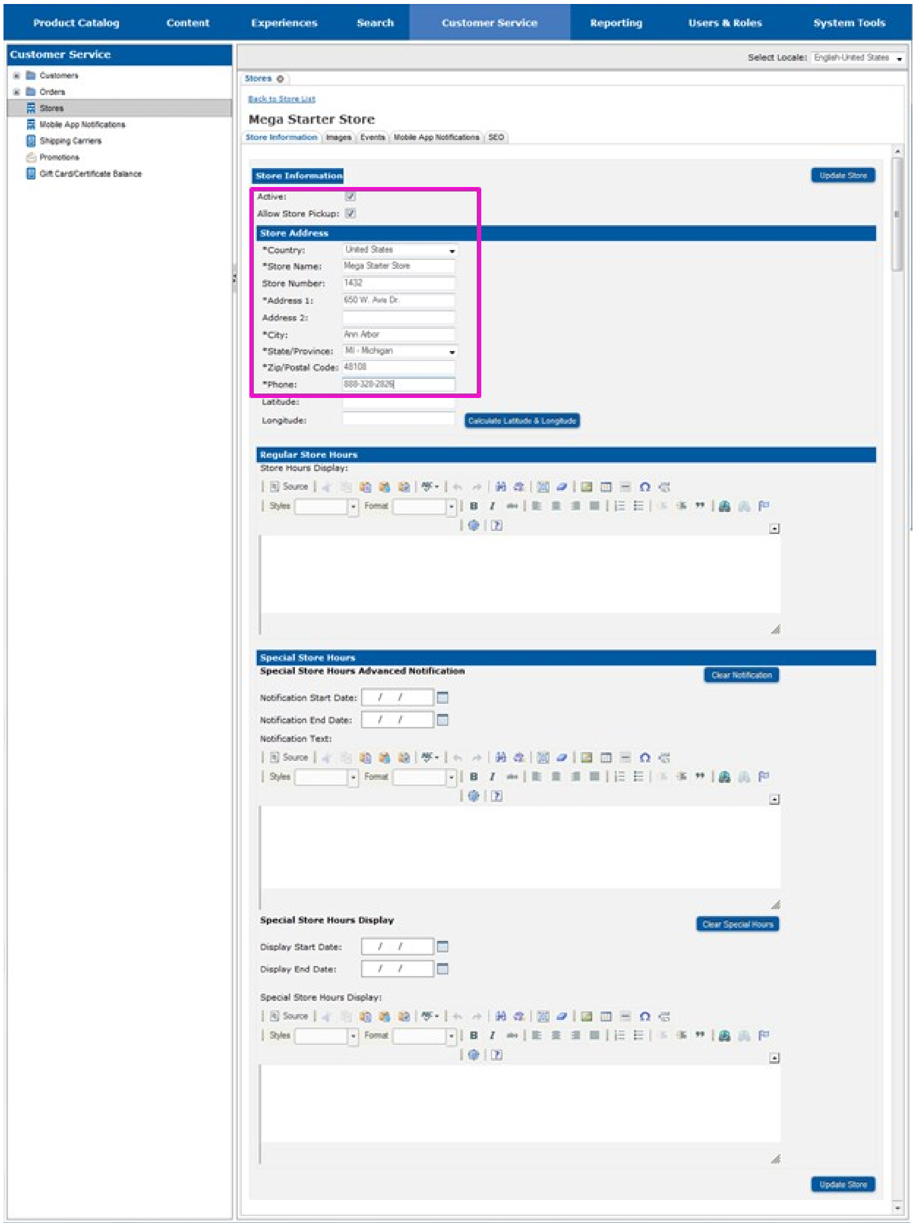
⇒ Enter the street address of the store in ADDRESS 1 and ADDRESS 2.

⇒ Enter the city the store is in in CITY.

⇒ Select the state or province the store is in in STATE/PROVINCE.

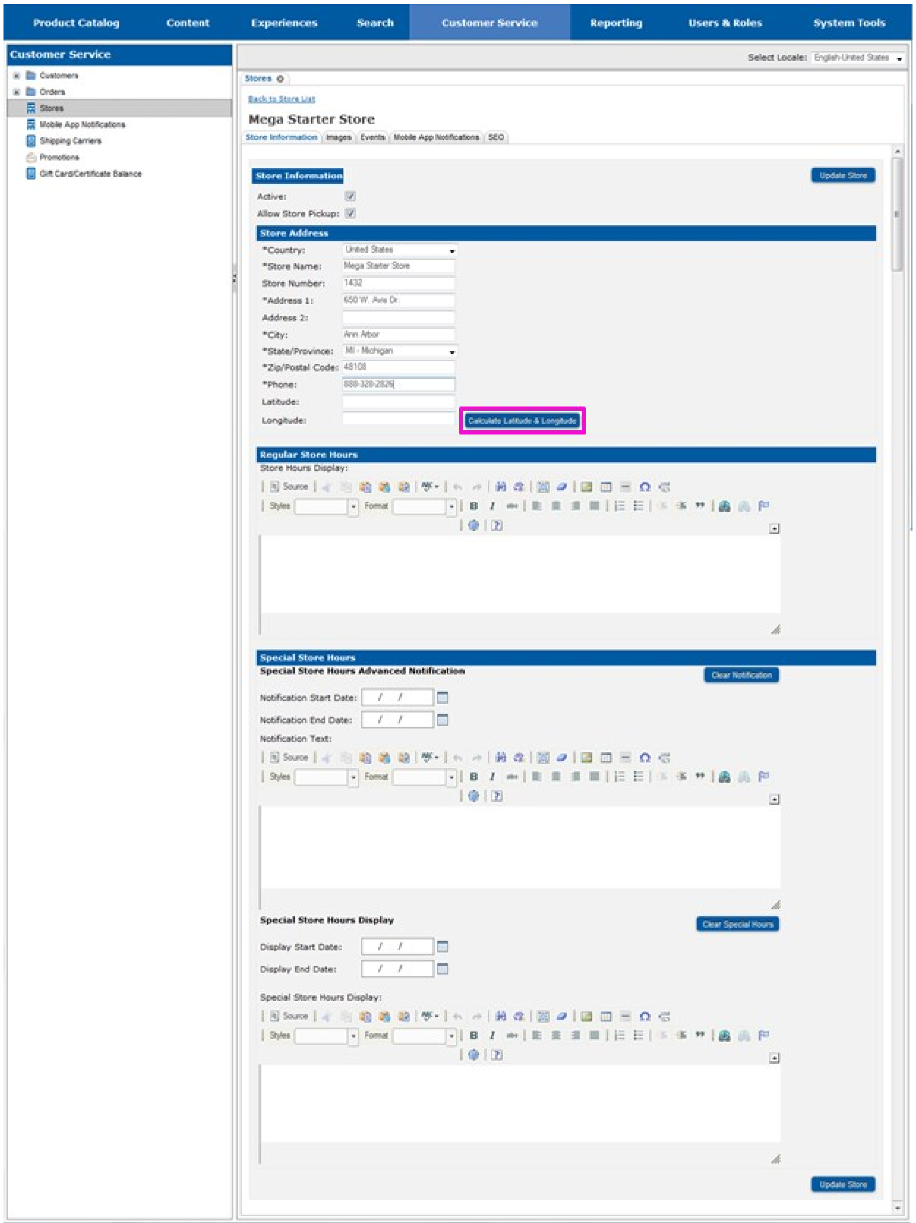
⇒ Enter the zip or postal code of the store in ZIP/POSTAL CODE.

⇒ Enter the phone number of the store in PHONE.

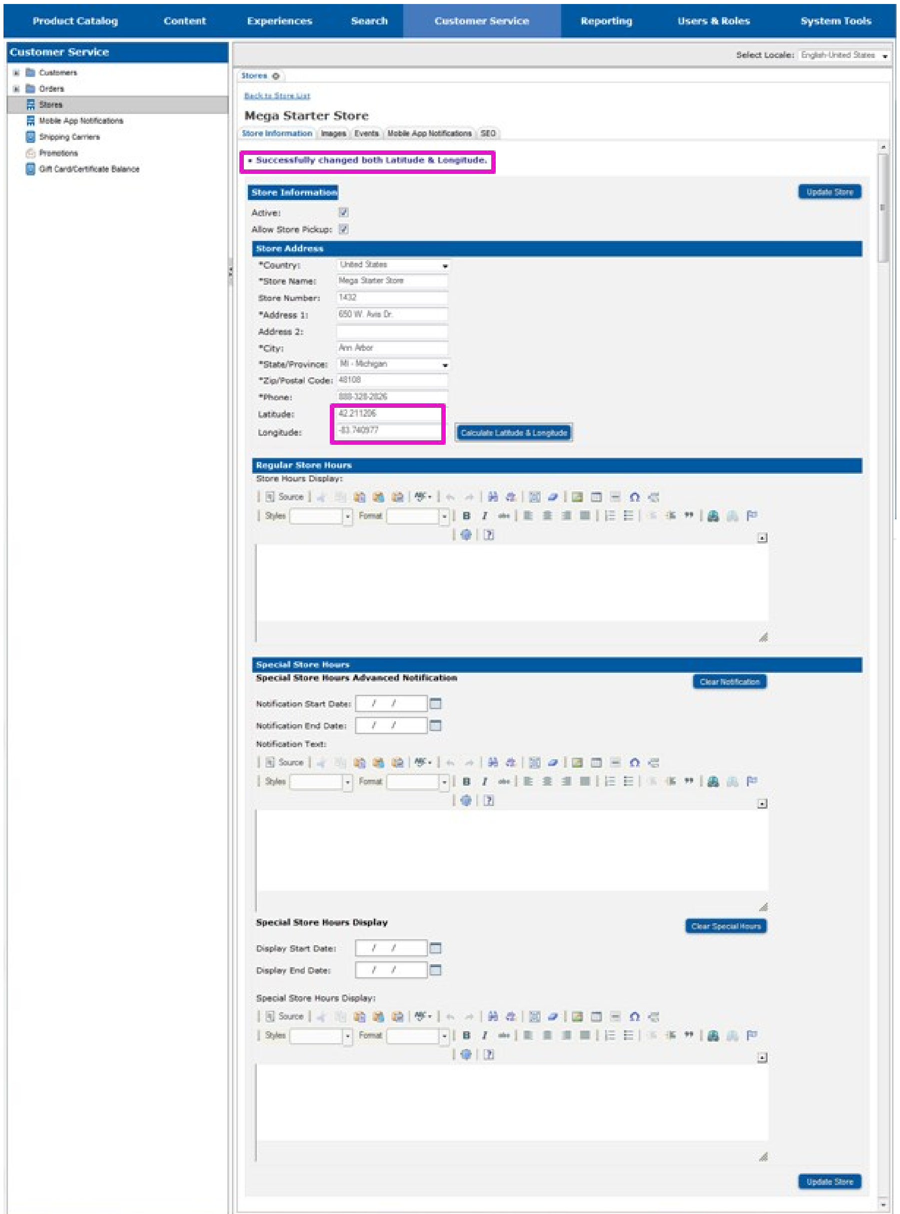


In order for the store to be placed on a store locator map, the latitude and longitude numbers for the store must also be entered. If you know those numbers, you may enter them directly into those fields. If you do not know them, you can have the Site Manager calculate them for you.

⇒ Select CALCULATE LATITUDE & LONGITUDE.



The page will redraw and you will see that the LATITUDE and LONGITUDE fields will be filled in. You will also see a message indicating that they have been updated.



Enter any store hours information that you wish. You can enter regular hours and also special hours for dates when the store hours are not standard. You can also enter a message that will appear on the store details message that notifies customers of the special hours.

⇒ Enter the standard hours for the store in the STORE HOURS DISPLAY text field.

⇒ If you wish to create a message notifying customers of special hours, enter a start date for the message in the NOTIFICATION START DATE field.

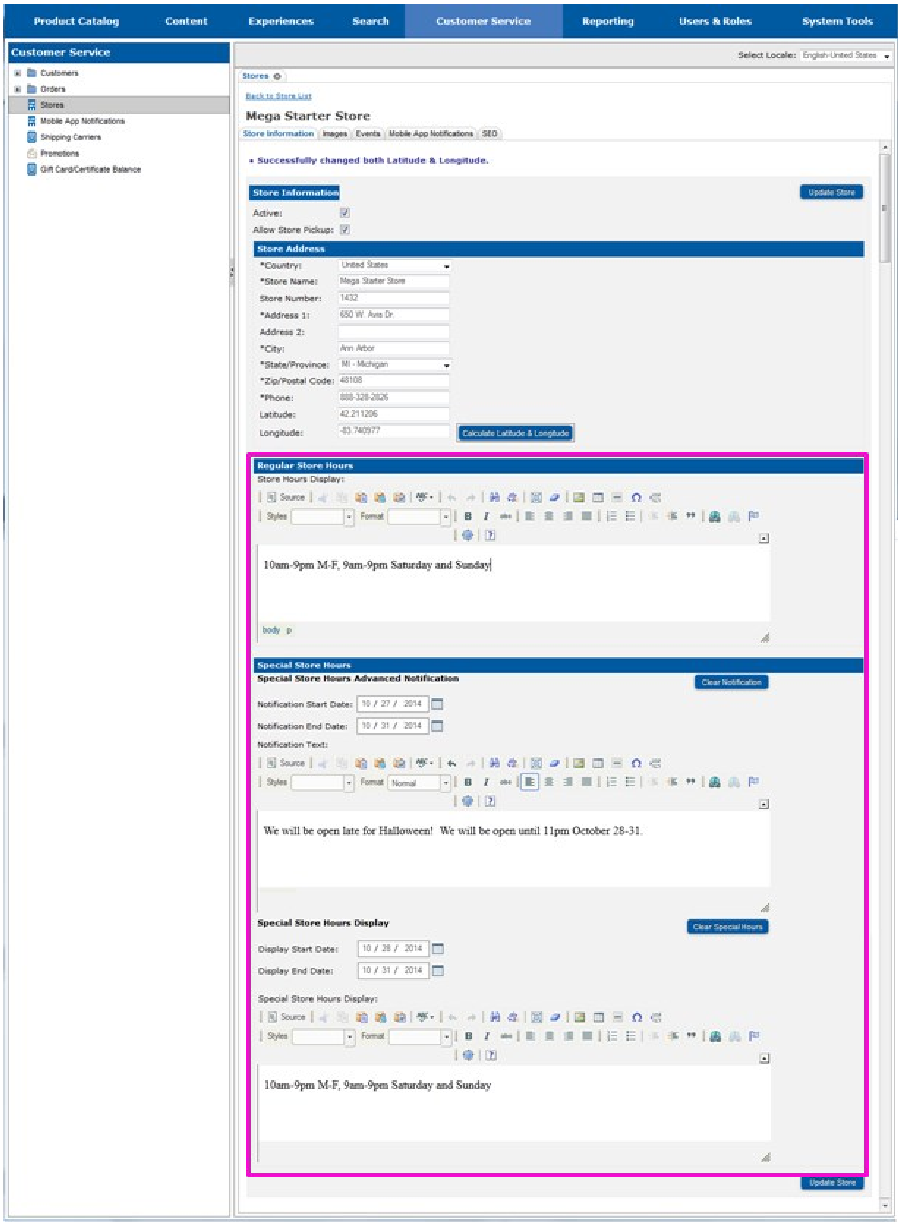
⇒ If you wish to create a message notifying customers of special hours, enter an end date for the message in the NOTIFICATION END DATE field.

⇒ If you wish to create a message notifying customers of special store hours, enter the text for the message in the NOTIFICATION TEXT entry field.

⇒ If you wish to show special store hours on the store's detail page, enter the date to start showing the special hours in the DISPLAY START DATE field.

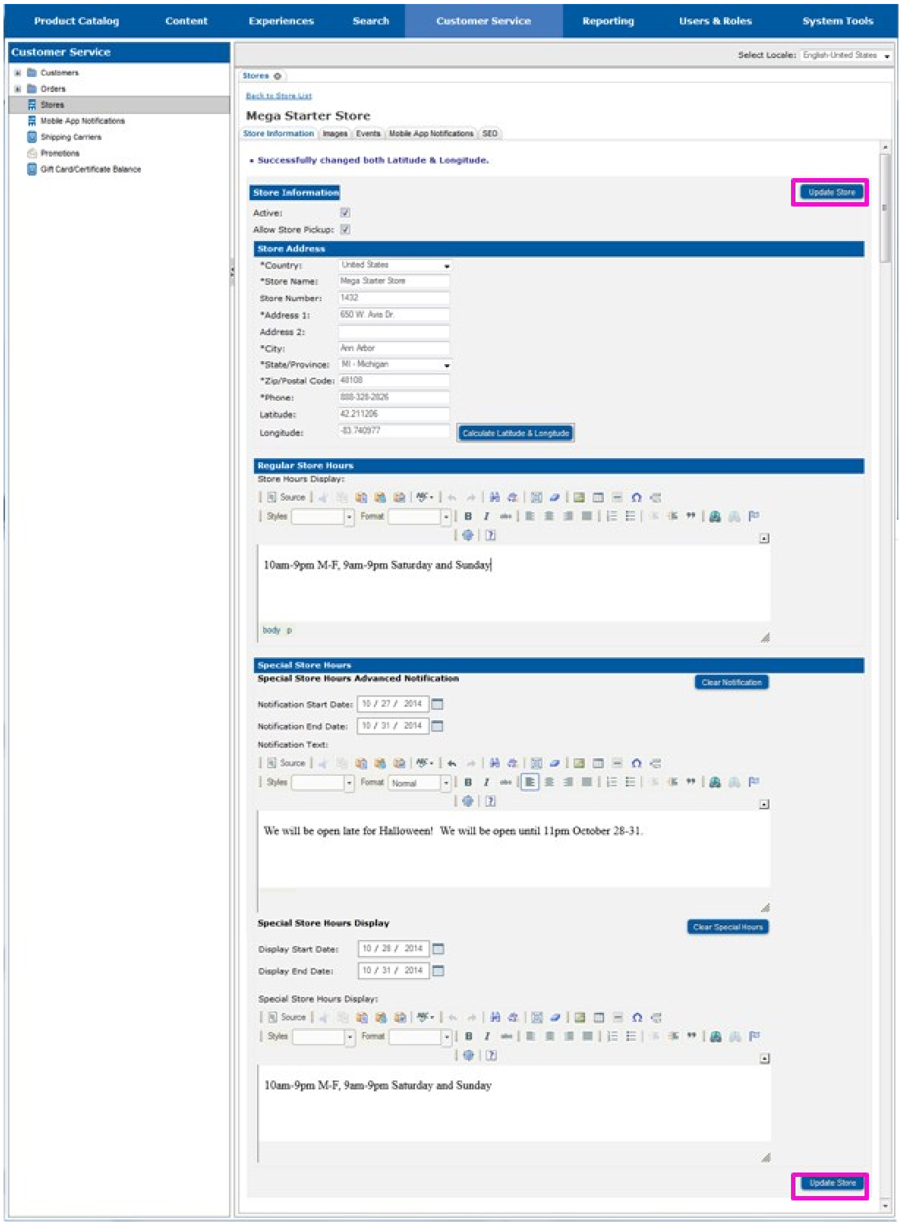
⇒ If you wish to show special store hours on the store's detail page, enter the date to stop showing the special hours in the DISPLAY END DATE field.

⇒ If you wish to show special store hours on the store's detail page, enter the hours in the SPECIAL STORE HOURS DISPLAY text field.

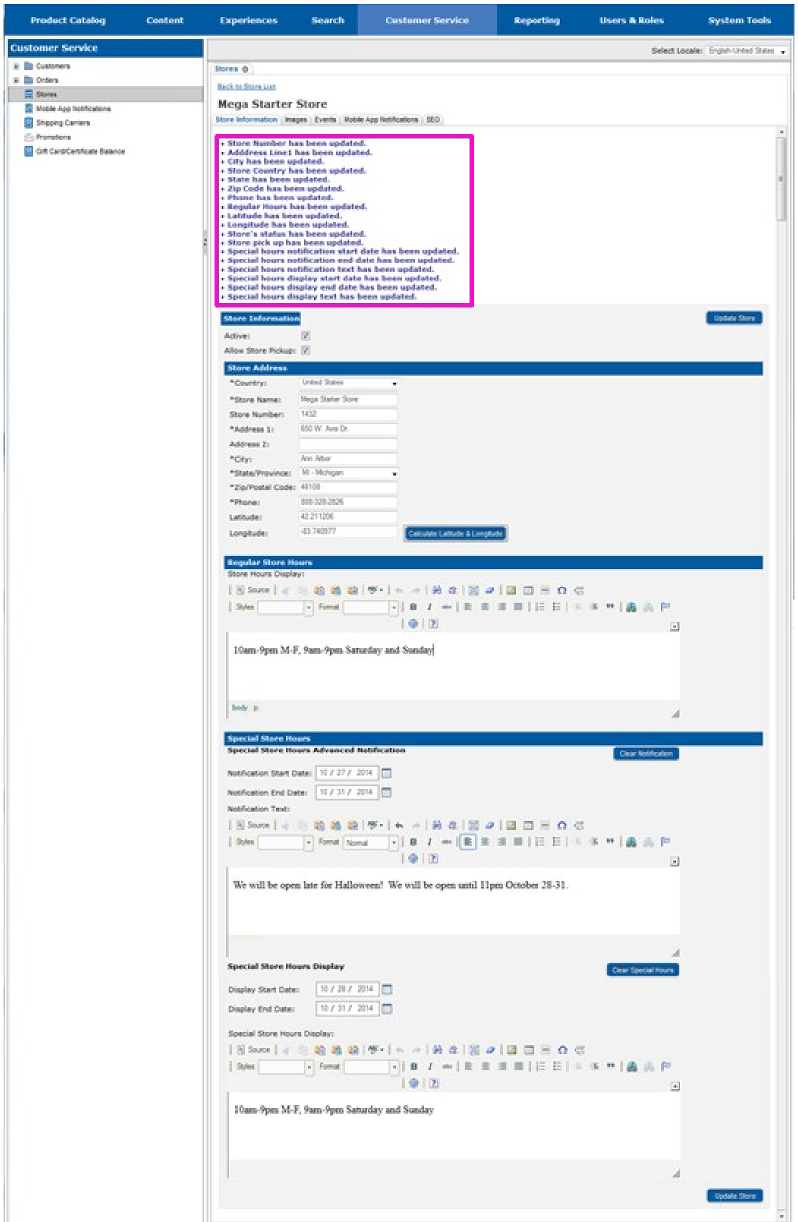


You will need to save the information you have entered.

⇒ Select UPDATE STORE.



The page will redraw and you will see messages indicating that each piece of information you entered has been saved.



The store has now been added and is available on a store locator map. Proceed to section ***View New Items on a Store Locator Page*** if you want to view the store on a map.

See also

Before You Begin
The Examples Used
Work With a Store
Add a Store Event
Add a Store Image
Add a Store Notification
Modify SEO Data
View New Items on a Store Detail Page

Home > Tutorials > Working With Stores > Add a Store Event

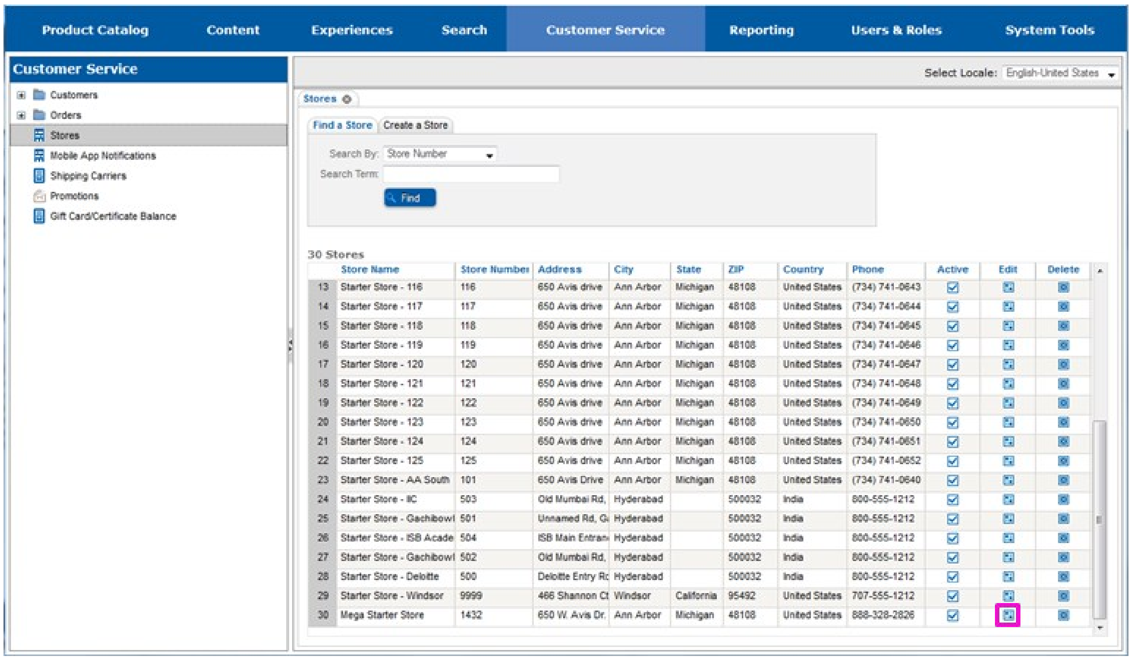
Add a Store Event

To complete these steps, you will need to be in the CUSTOMER SERVICE -> STORES portion of the Site Manager. If you are unsure where that section is, see ***Work With a Store***.

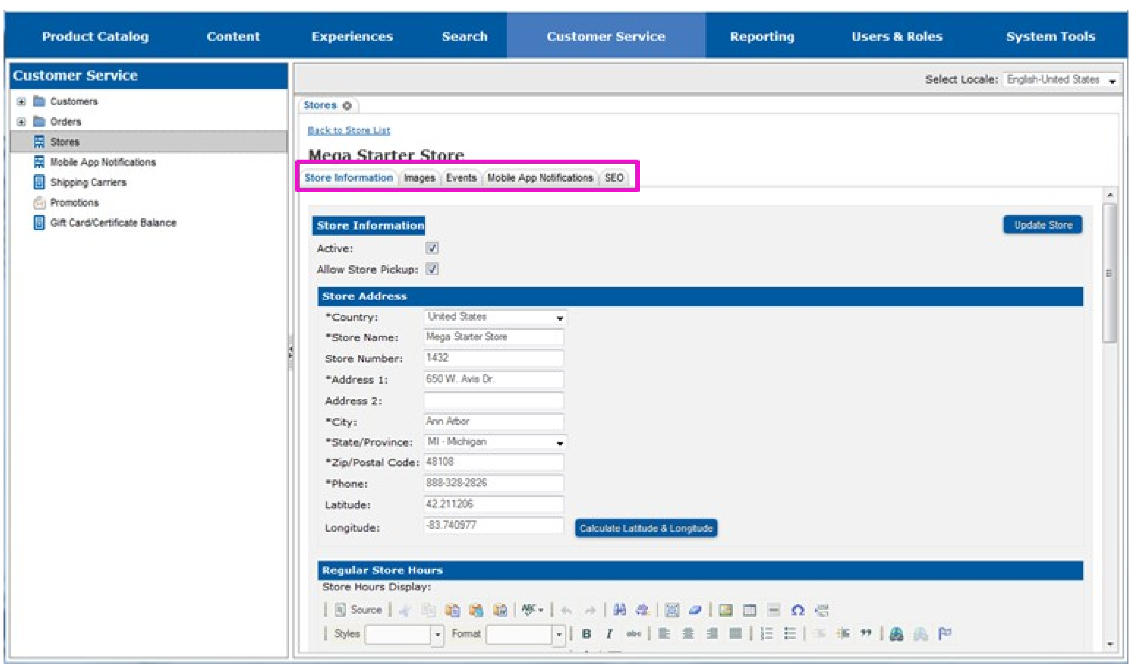
You will edit the store that you are adding the event to.

⇒ Locate the store you will be adding the event to.

⇒ Select the EDIT button for the store.

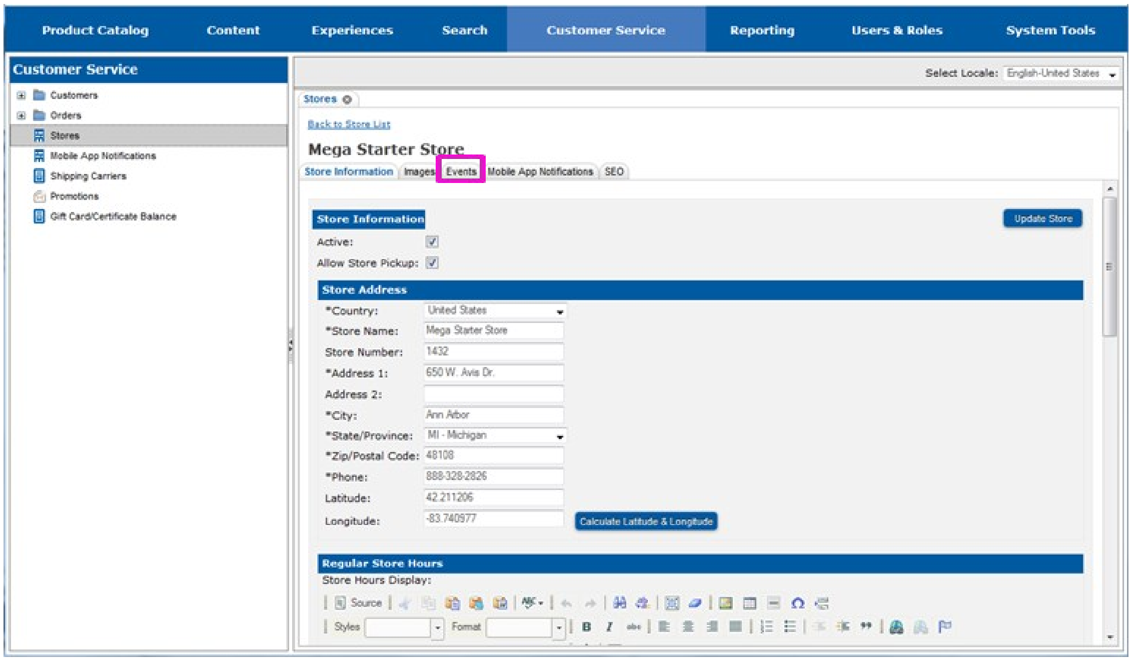


The page will redraw and you will see multiple tabs for the store.

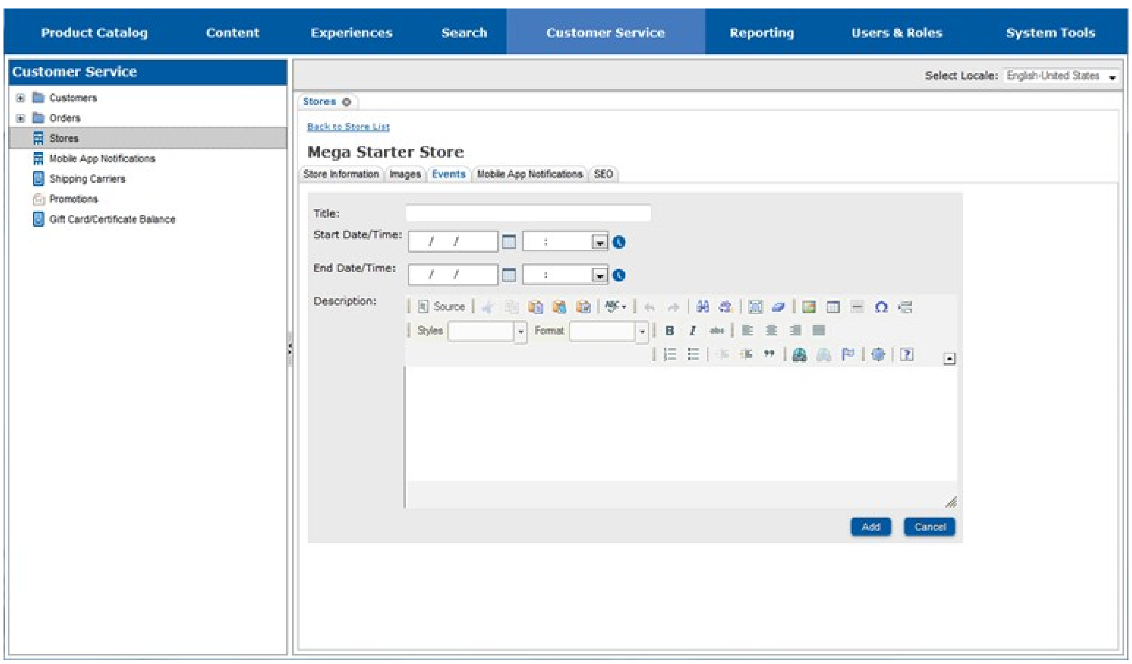


You will be working in the EVENTS tab.

⇨ Select the EVENTS tab.



The page will redraw and you will see fields to define events for the store, along with a list of any events currently defined for the store.



⇨ Enter a title for the event in the TITLE entry box.

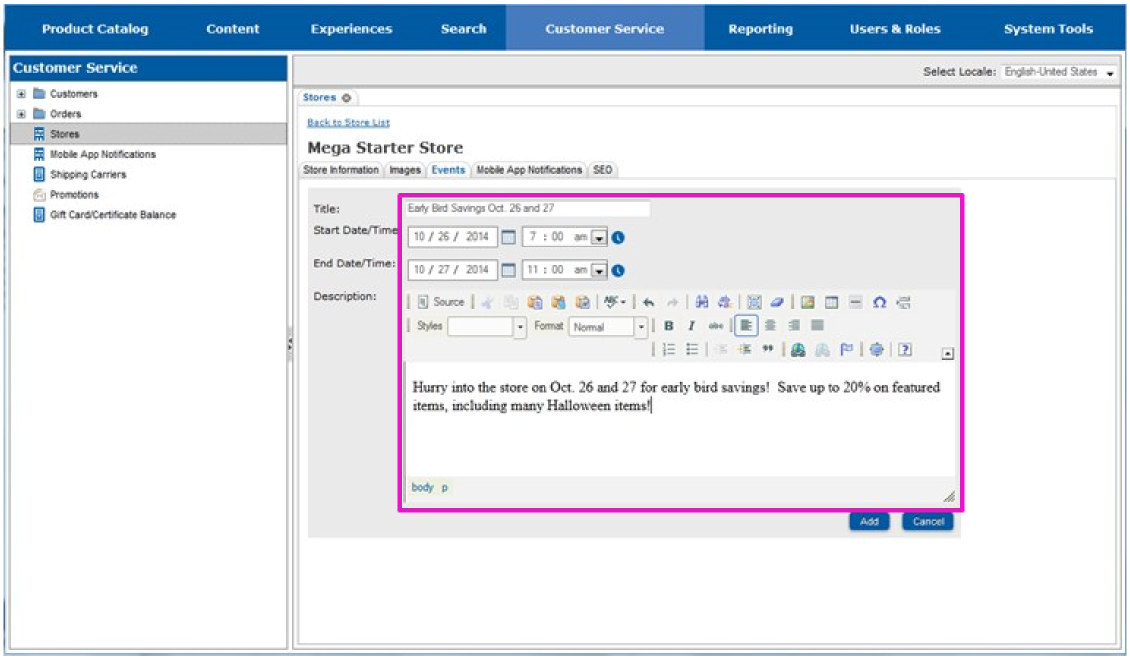
⇨ Enter the date the event should start appearing on the web site in the START DATE field. You can also use the calendar icon to select the date.

⇨ In the START TIME field, enter the time on the start date when the event should appear on the web site. You can also use the clock icon to select a time.

⇨ Enter the date the event should stop appearing on the web site in the END DATE field. You can also use the calendar icon to select the date.

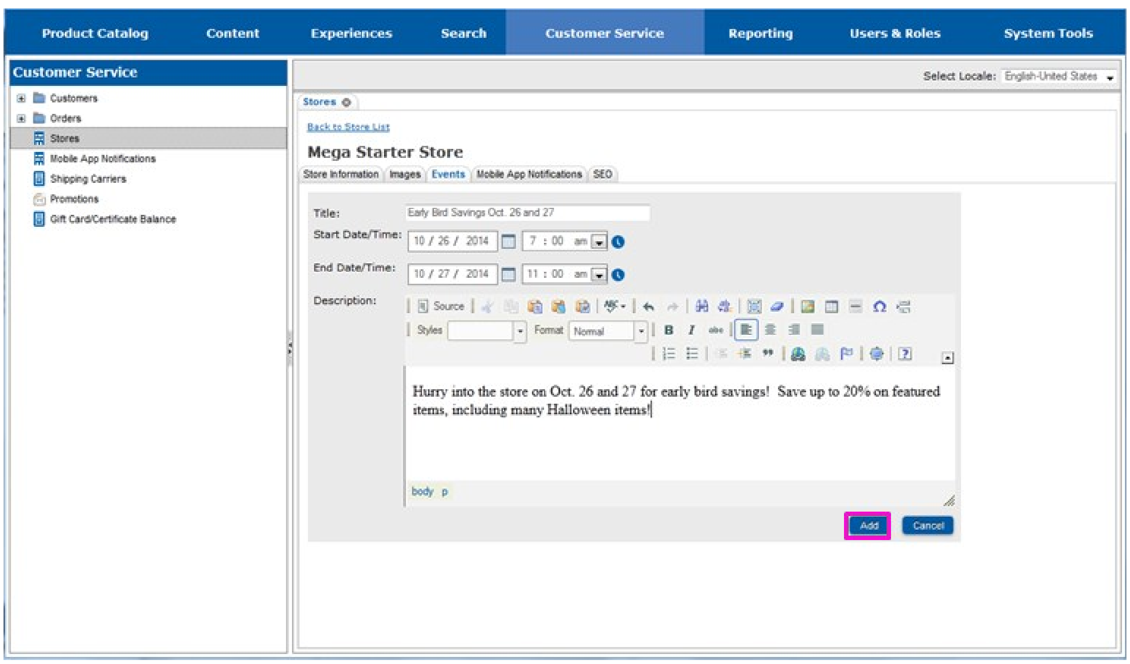
⇨ In the END TIME field, enter the time on the end date when the event should stop appearing on the web site. You can also use the calendar icon to select the time.

⇨ Enter a description for the event in the DESCRIPTION edit box. Use the edit controls to format the description as you like.

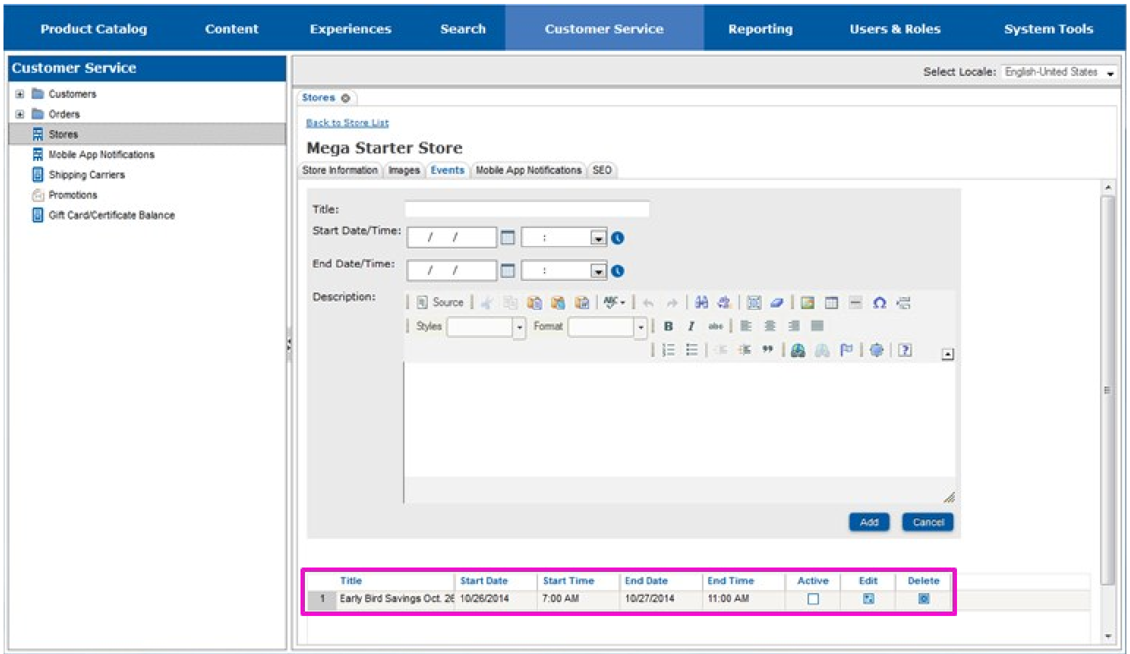


When you have completed adding the title and description for the event, the event should be saved.

⇨ Select ADD.

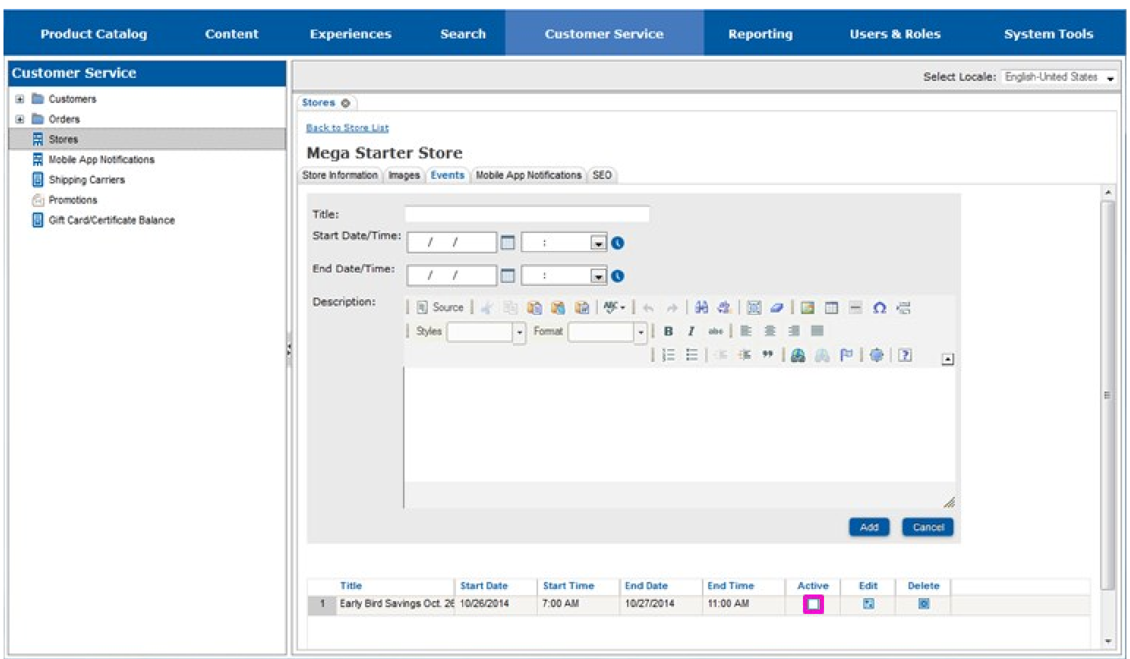


The page will redraw and you will see your event added the list of events defined for the store.

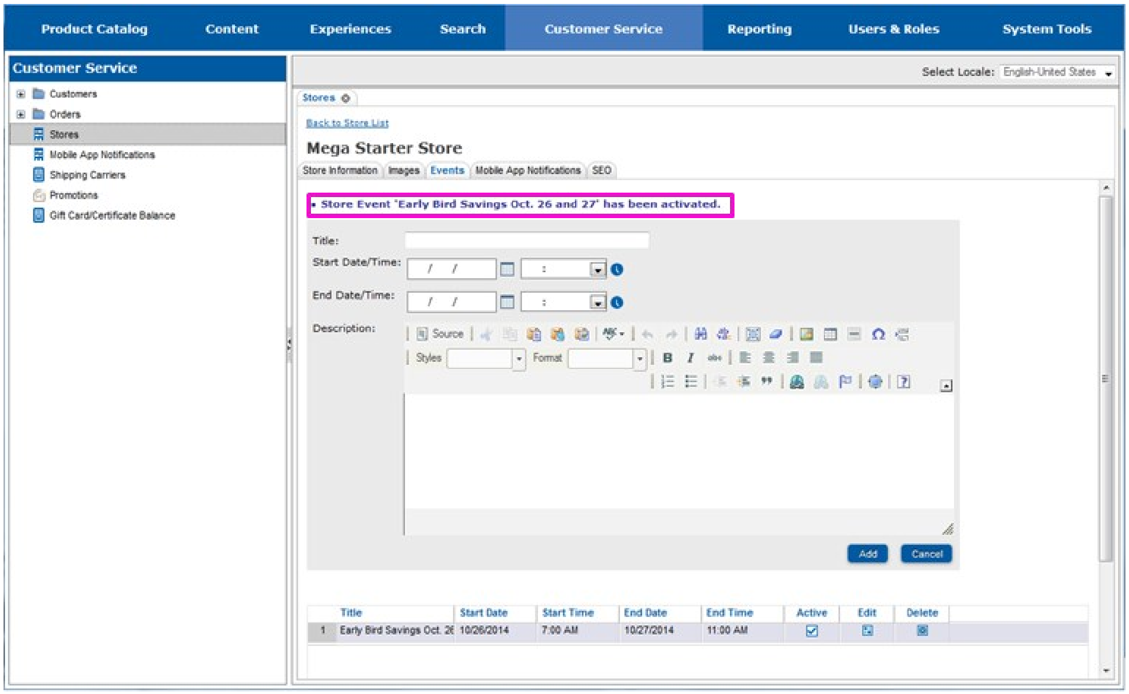


Newly added events are not active and will not be shown on the store locator page until they are activated.

⇒ Select the ACTIVE checkbox to the right of the store event.



The page will redraw and you will see a message indicating the event has been activated.



The event is now available for display on the store locator page on the website. Continue on to section ***View New Items on a Store Locator Page*** if you want to view the new event on the store locator page.

See also

Before You Begin
The Examples Used
Work With a Store
Add a Store
Add a Store Image
Add a Store Notification
Modify SEO Data
View New Items on a Store Detail Page

Home > Tutorials > Working With Stores > Add a Store Image

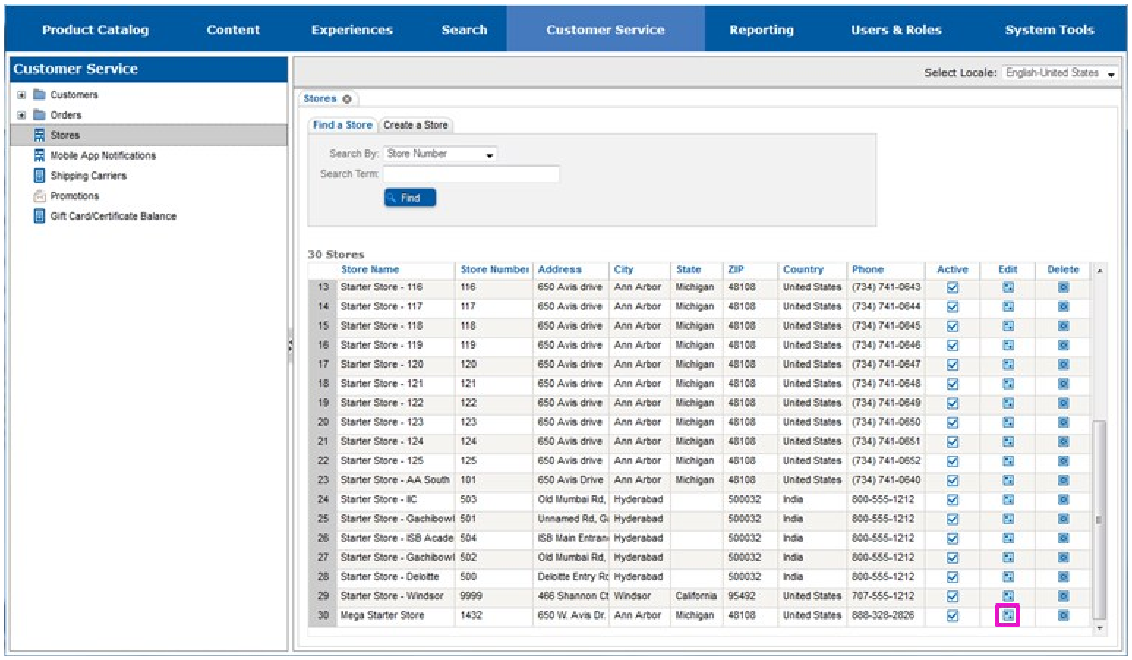
Add a Store Image

To complete these steps, you will need to be in the CUSTOMER SERVICE -> STORES portion of the Site Manager. If you are unsure where that section is, see ***Work With a Store***.

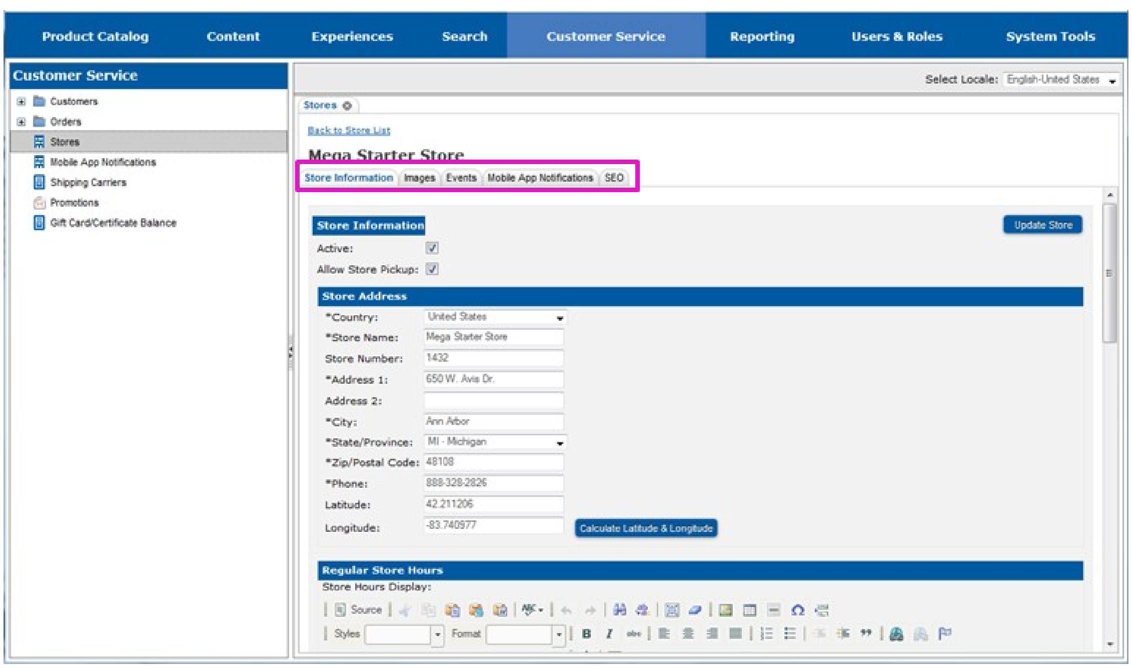
You will edit the store that you are adding the image to.

⇒ Locate the store you will be adding the image to.

⇒ Select the EDIT button for the store.

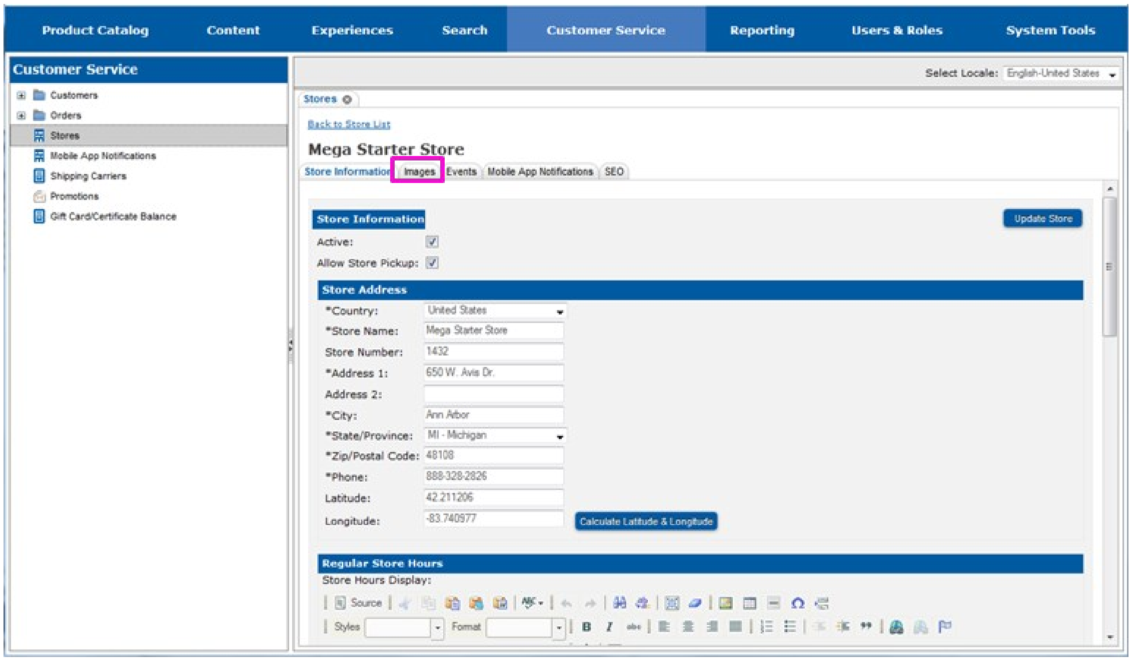


The page will redraw and you will see multiple tabs for the store.

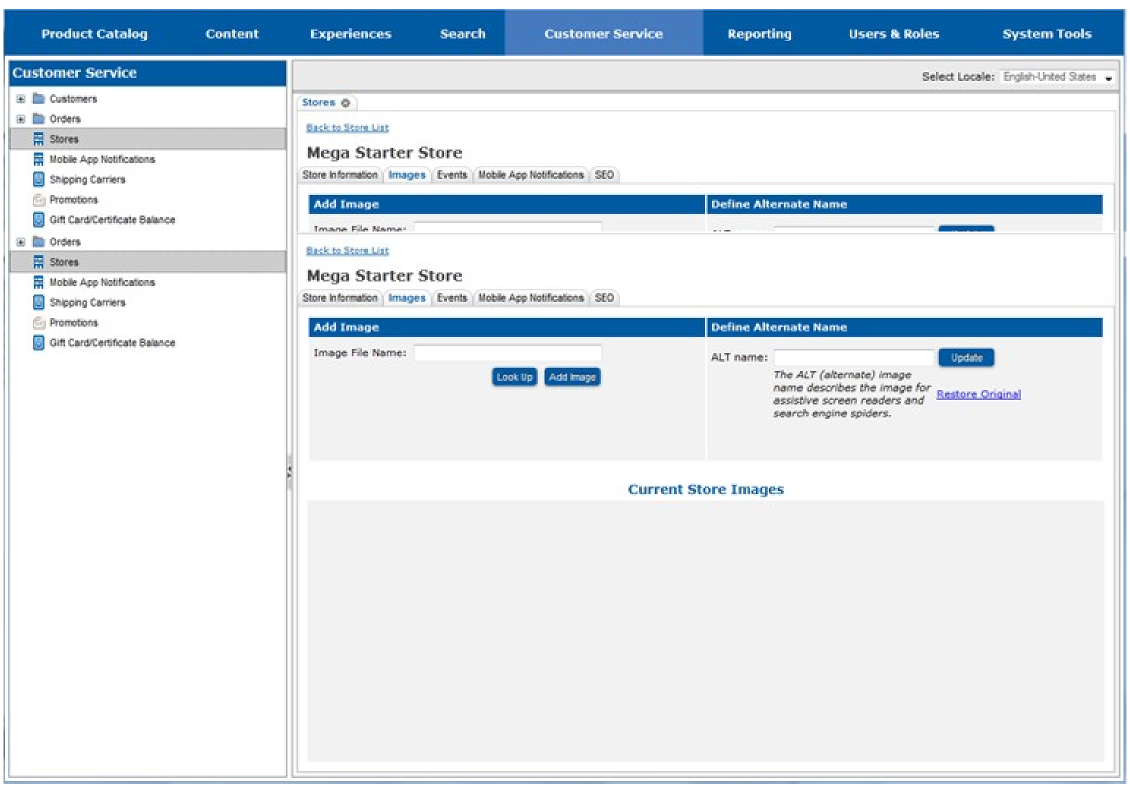


You will be working in the IMAGES tab.

⇨ Select the IMAGES tab.



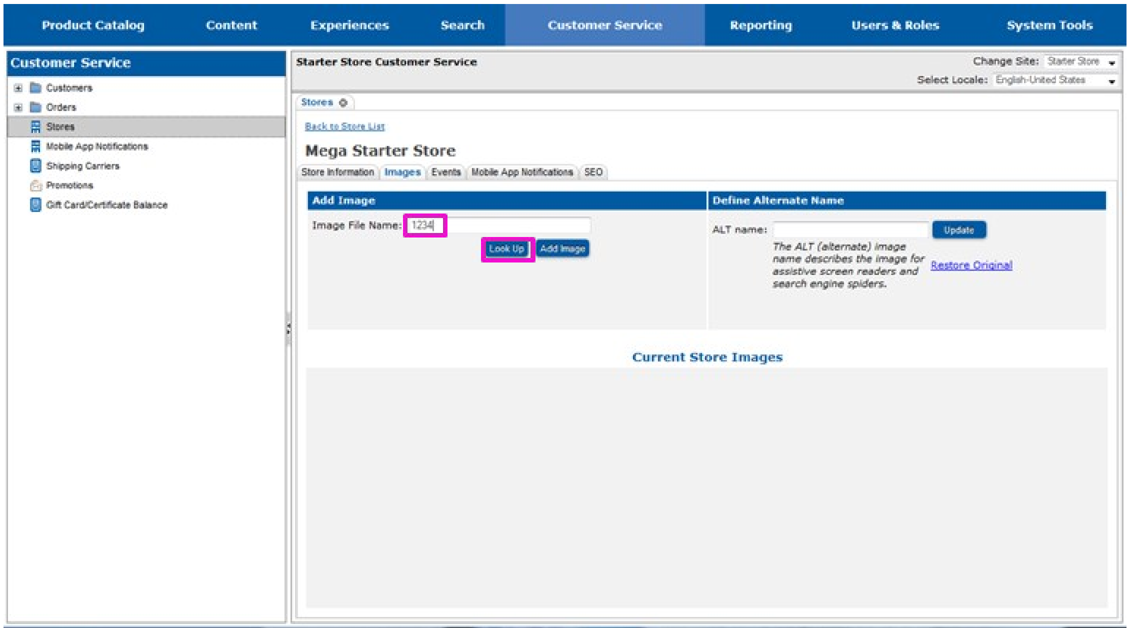
The page will redraw and you will see fields to add an image for the store, along with any images previously defined for the store.



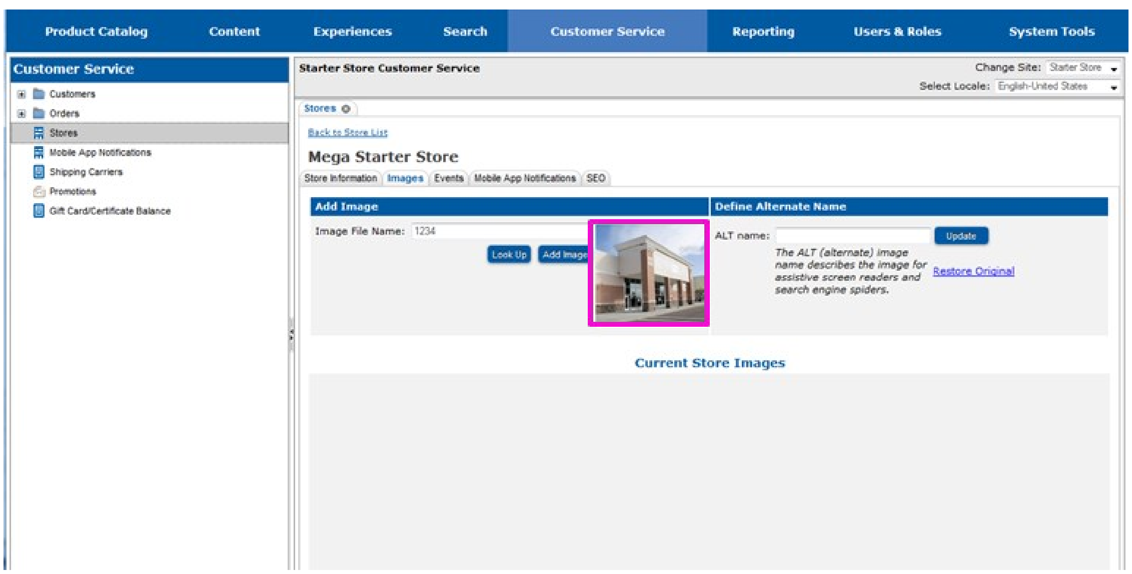
You can add as many images as you want for the store.

⇒ Enter the name of an image file in the IMAGE FILE NAME field.

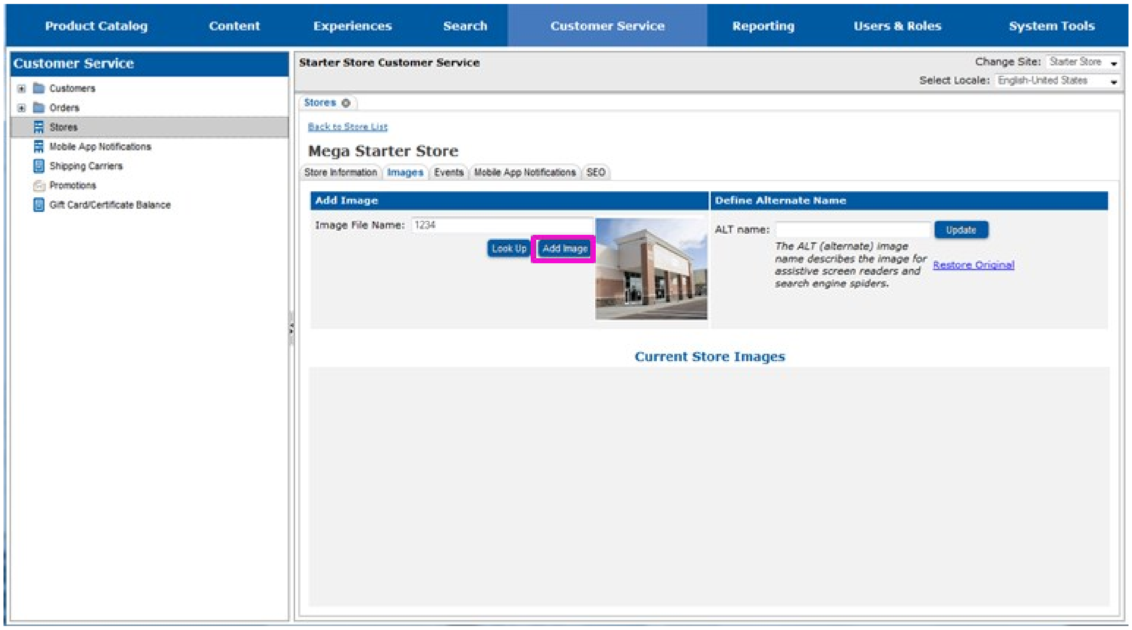
⇒ Select LOOK UP to find the image in the image server.



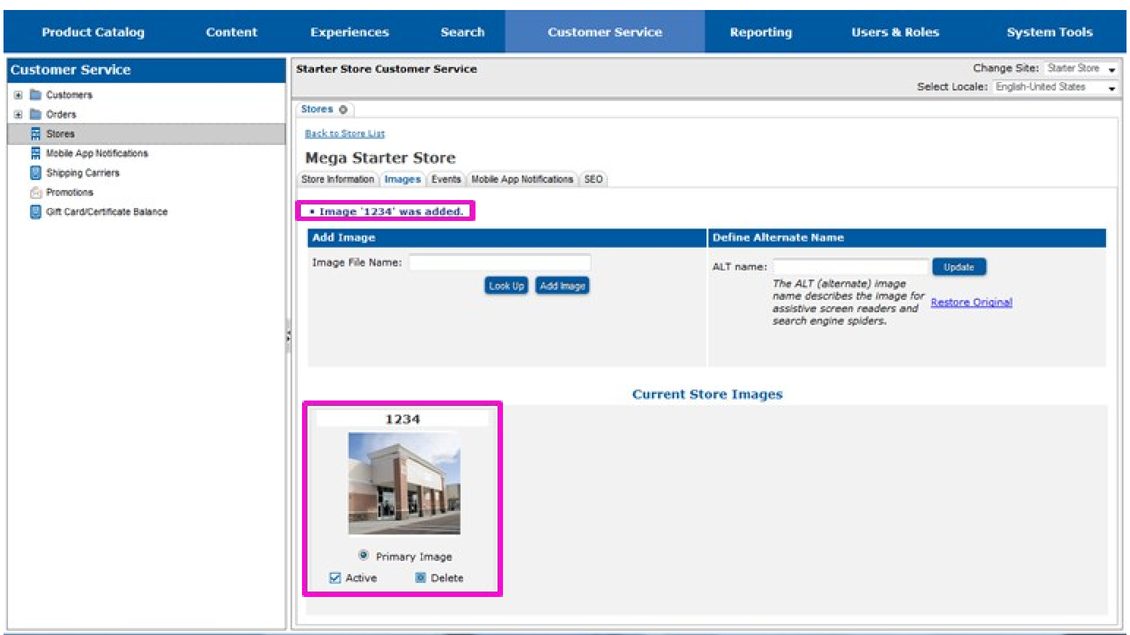
A thumbnail of the image will appear to the right of the IMAGE FILE NAME.



⇒ Select the ADD IMAGE button to add the image to the list of store images.

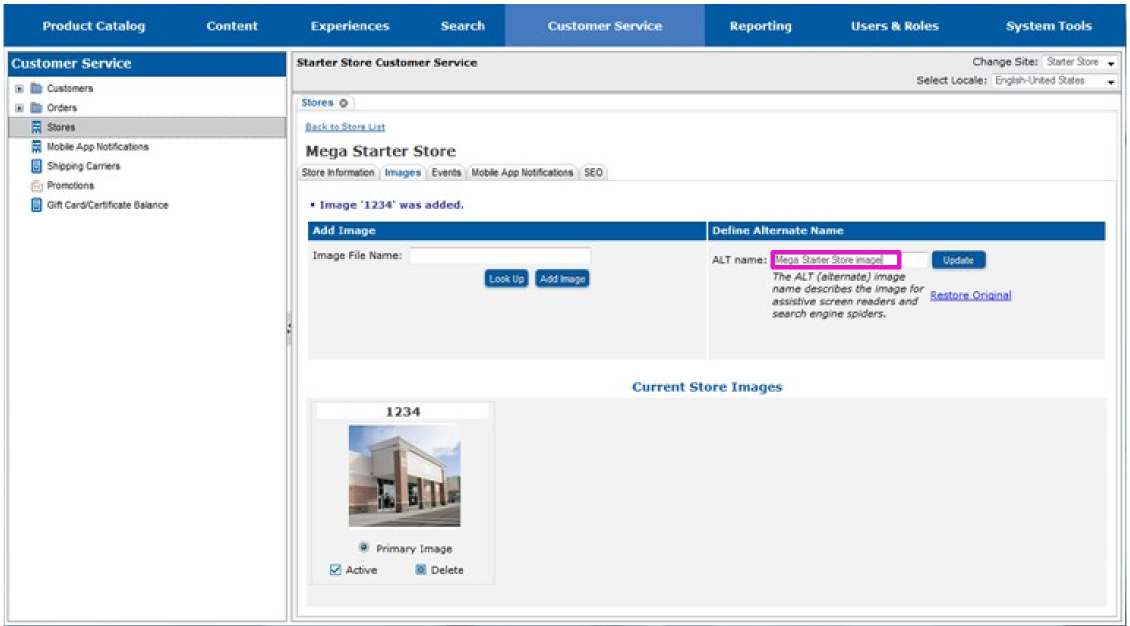


The image will appear in the CURRENT STORE IMAGES section of the page. The image will automatically be selected as the primary image for the store.

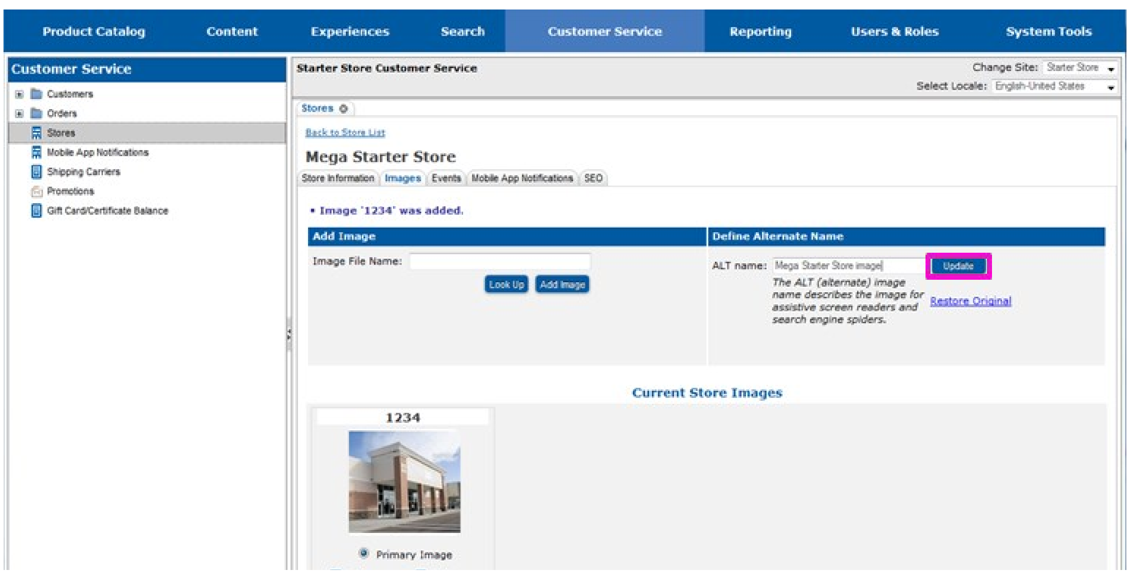


Each image should have alternate text set up for it. Alternate text is used by assistive screen readers and also used in place of the image if for some reason the graphic becomes unavailable. Alternate text for store images defaults to the name of the store. You can update the alternate text if you would prefer different text.

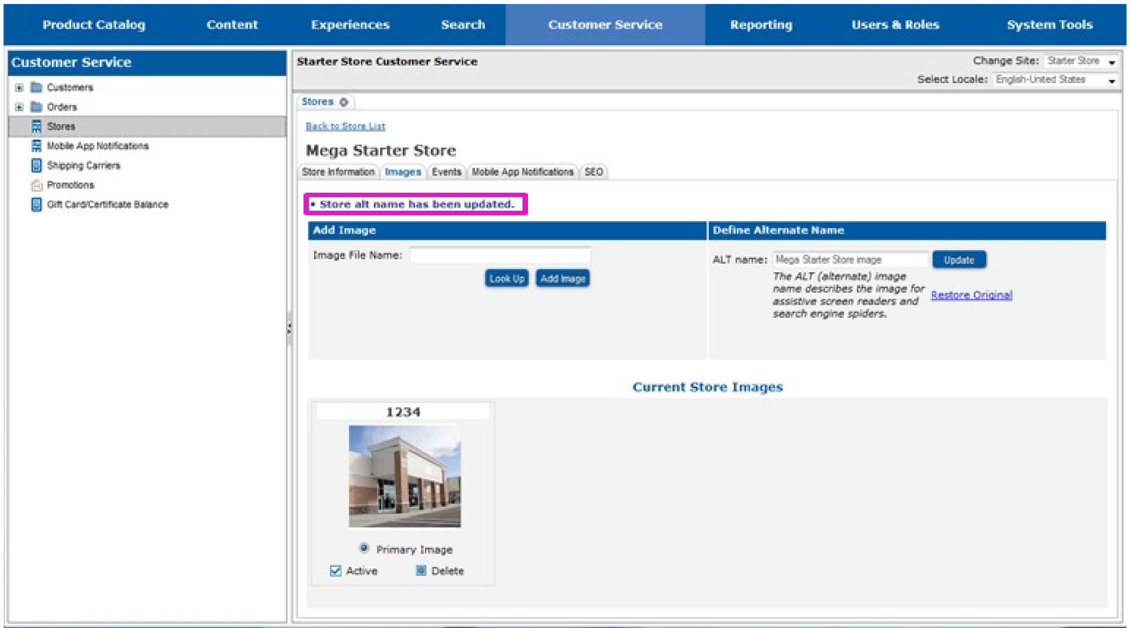
⇒ Enter new alternate text in ALT NAME.



⇒ Select the UPDATE button.



You will see a message indicating that the alternate name has been updated.



The image is now available for display on the store locator page on the website. Continue on to section ***View New Items on a Store Locator Page*** if you want to view the new image on the store locator page.

See also

Before You Begin
The Examples Used
Work With a Store
Add a Store
Add a Store Event
Add a Store Notification
Modify SEO Data
View New Items on a Store Detail Page

Home > Tutorials > Working With Stores > Add a Store Notification

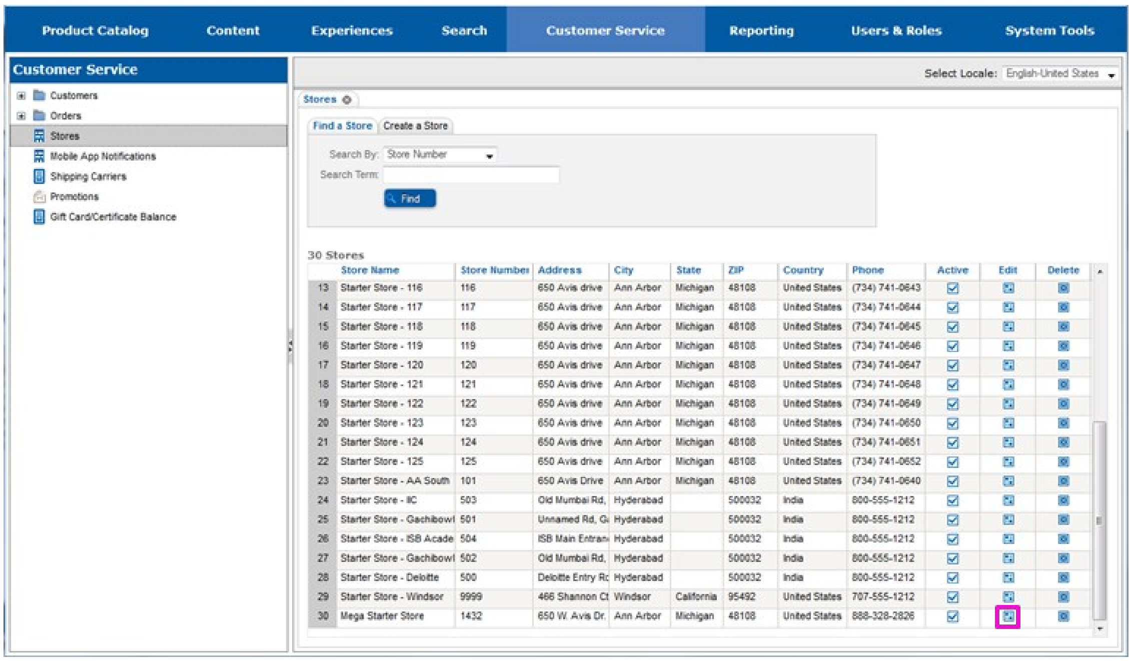
Add a Store Notification

To complete these steps, you will need to be in the CUSTOMER SERVICE -> STORES portion of the Site Manager. If you are unsure where that section is, see ***Work With a Store***.

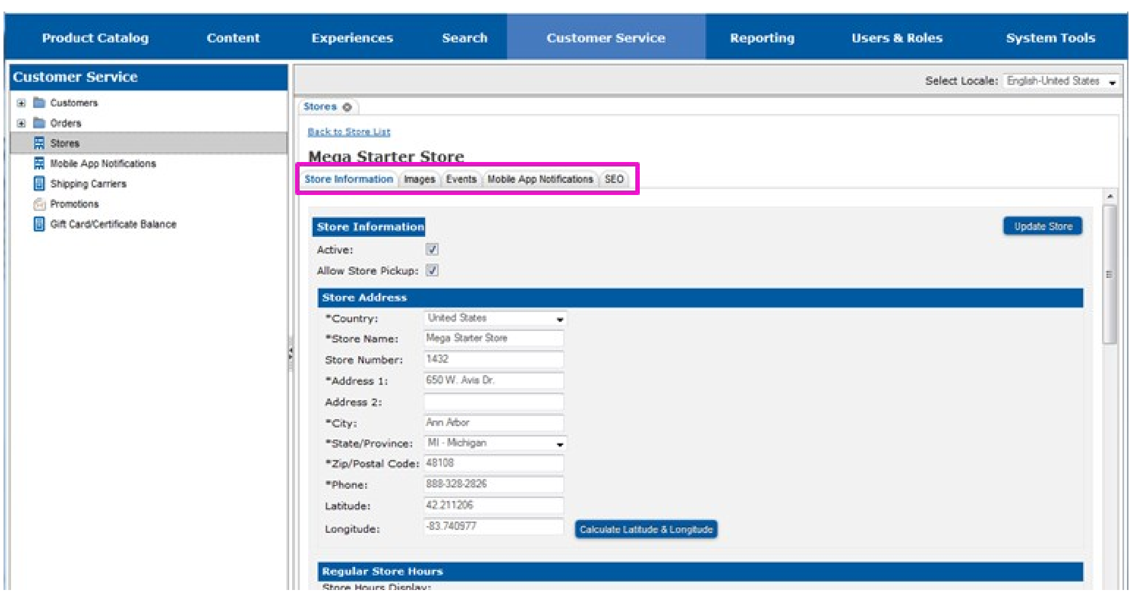
You will edit the store that you are adding the notification to.

⇨ Locate the store you will be adding the notification to.

⇨ Select the EDIT button for the store.

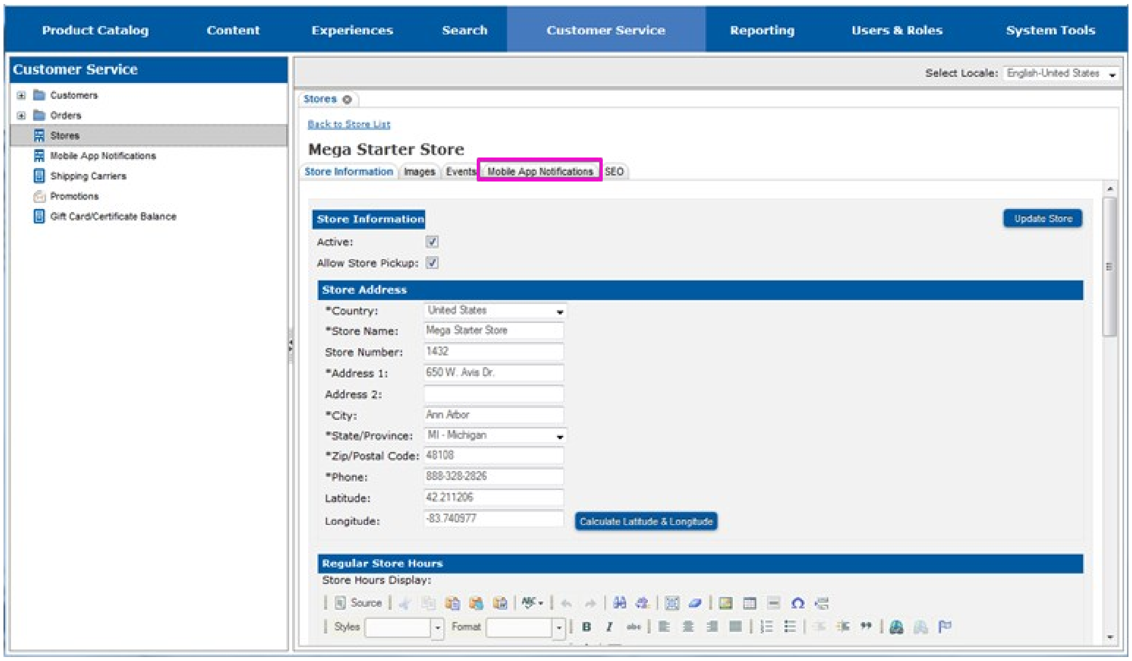


The page will redraw and you will see multiple tabs for the store.

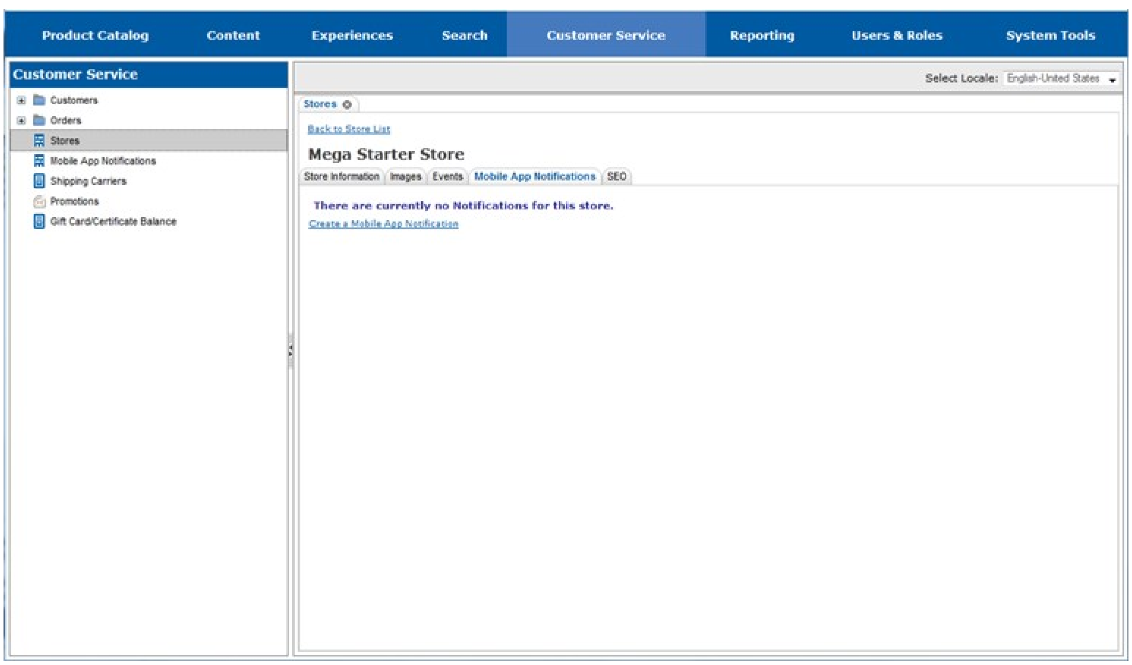


You will be working in the MOBILE APP NOTIFICATIONS tab.

⇨ Select the MOBILE APP NOTIFICATIONS tab.

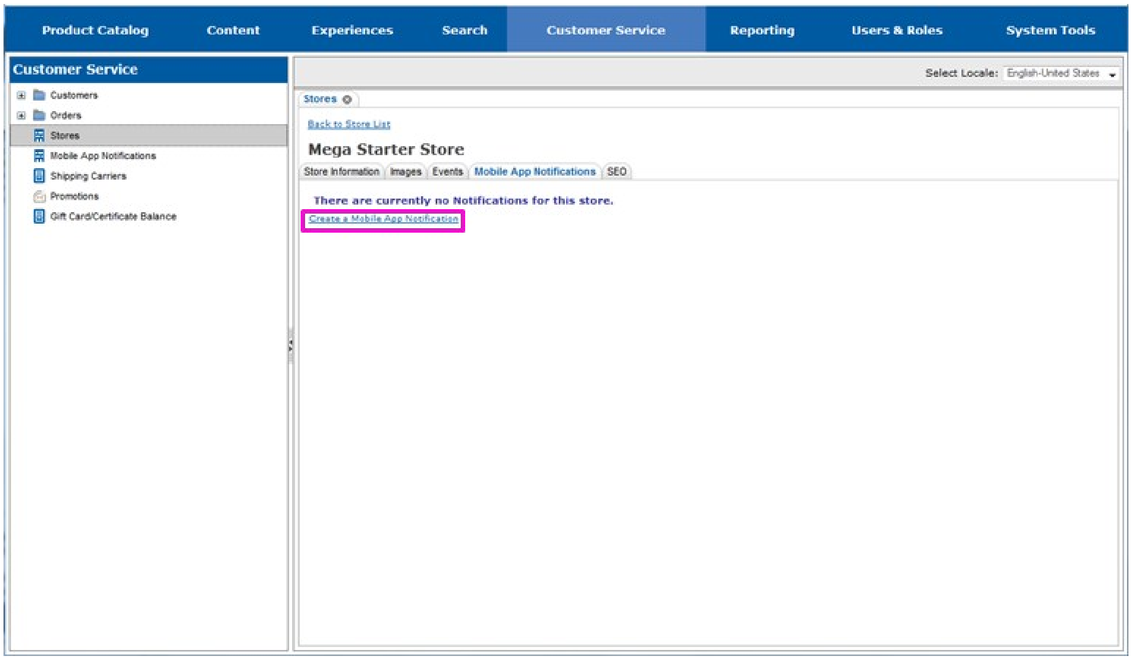


The page will redraw and you will see fields to define notifications for the store, along with a list of any notifications currently defined for the store.

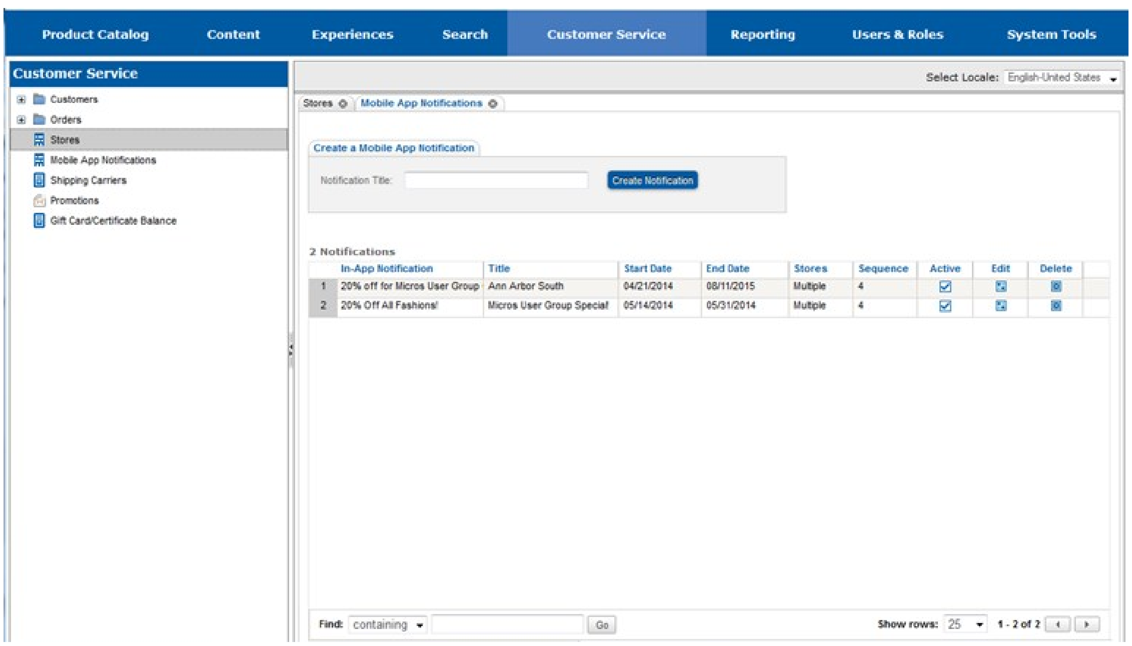


New notifications are created in the Customer Service -> Mobile App Notifications portion of the Site Manager. You can access that section by selecting the CREATE A MOBILE APP NOTIFICATIONS link.

⇒ Select the CREATE A MOBILE APP NOTIFICATION link.

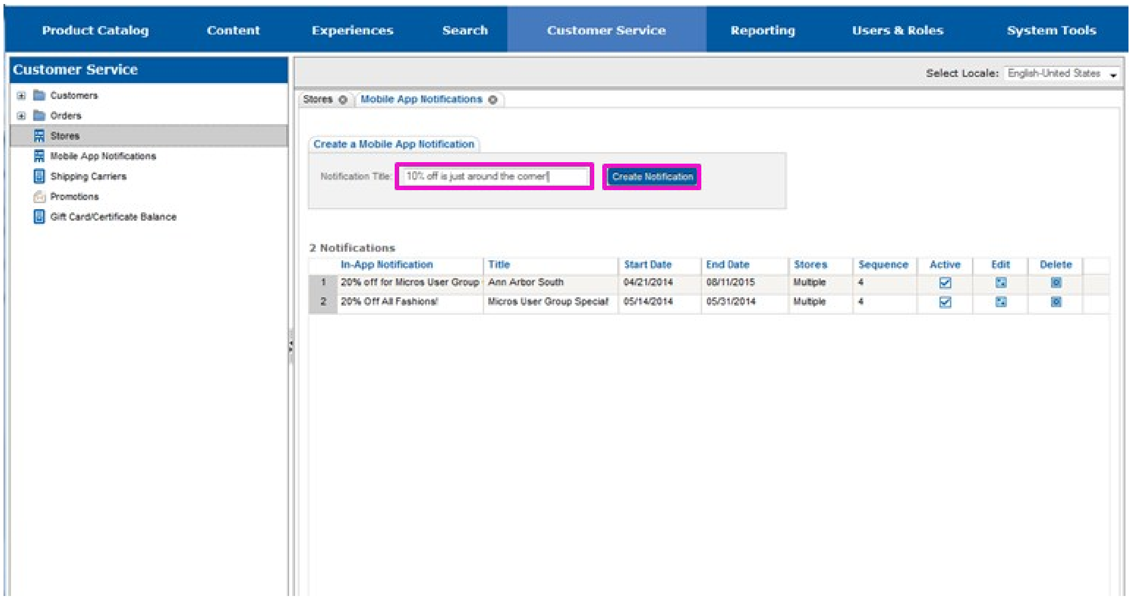


The page will redraw and a new MOBILE APP NOTIFICATIONS tab will appear.

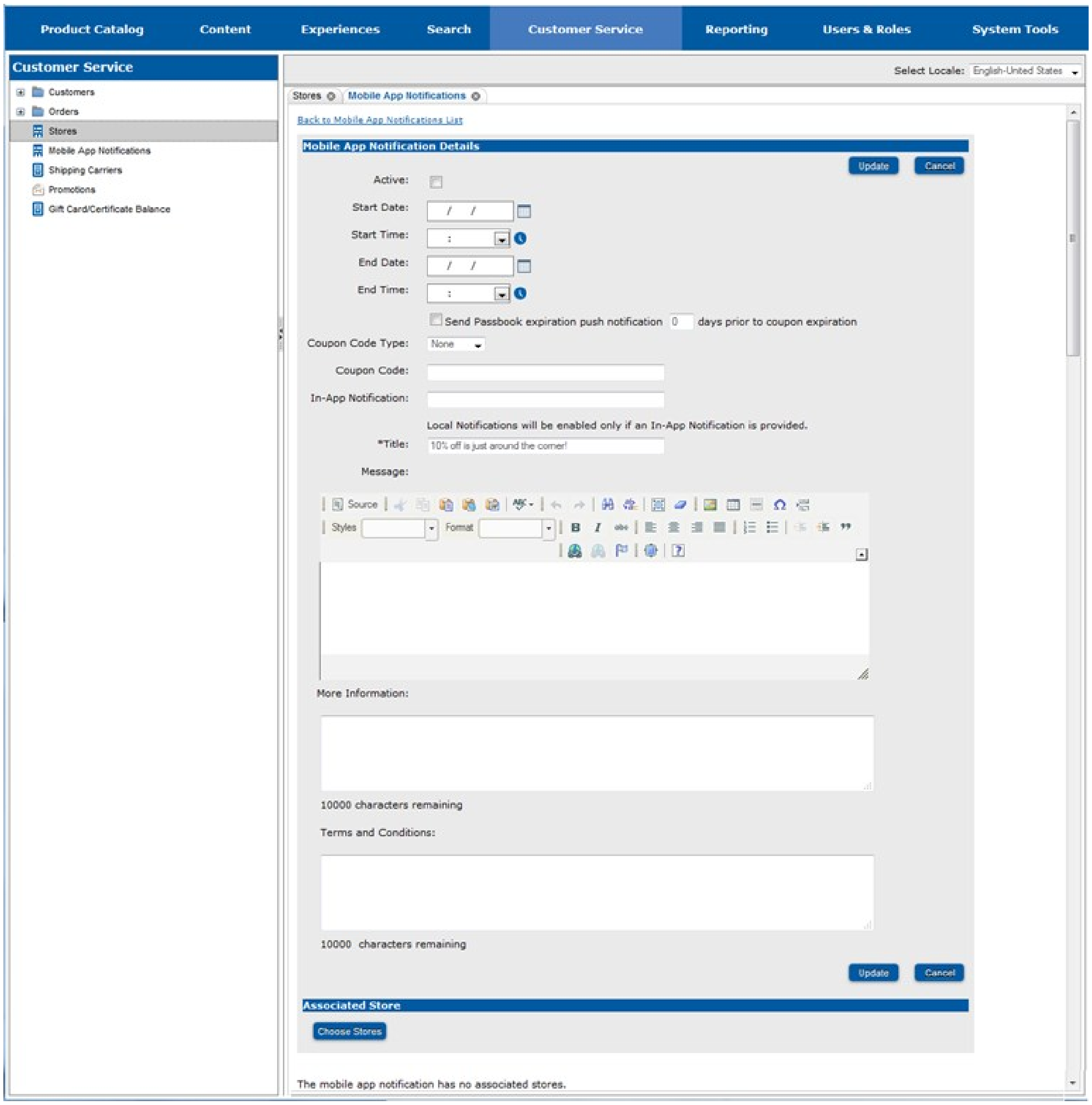


⇨ Enter a title for the notification in the NOTIFICATION TITLE link.

⇨ Select the CREATE NOTIFICATION button.



The page will redraw and a screen with fields to fill in for the notification will appear.



⇨ Select the ACTIVE checkbox if you wish the notification to be active immediately upon creation.

⇨ Enter the first date the notification can be used in the START DATE field. You can use the calendar to select the date or enter it by hand.

⇨ Enter the time on start date that the notification can first be used in the START TIME field. You can use the clock to select the time or enter it by hand.

⇨ Enter the last date the notification can be used in the END DATE field. You can use the calendar to select the date or enter it by hand.

⇨ Enter the time on the end date that the notification should stop being used in the END TIME field. You can use the clock to select the date or enter it by hand.

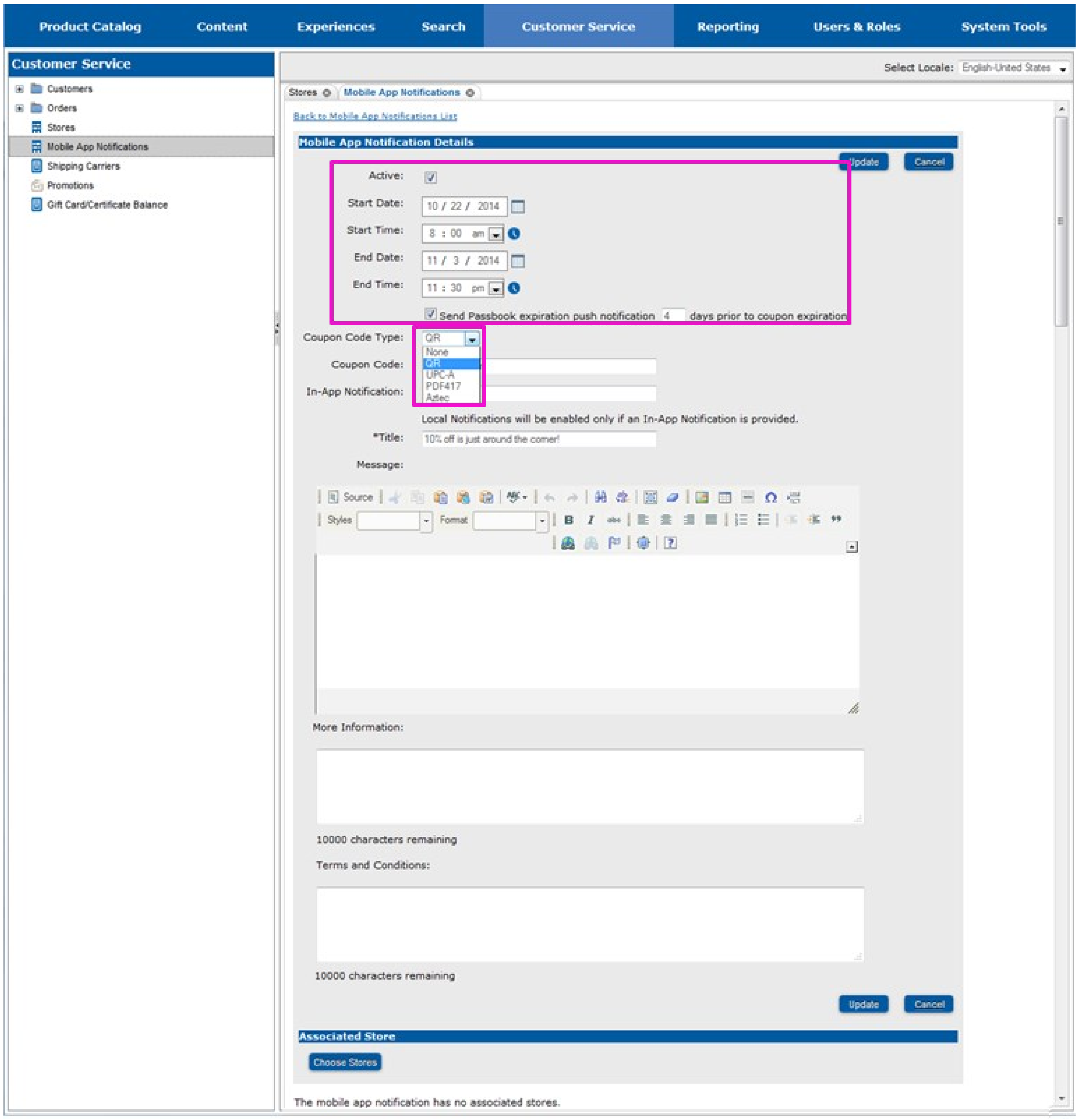
A notification can be sent to the customer prior to the expiration of the Passbook.

⇨ Select the SEND PASSBOOK EXPIRATION NOTICE checkbox to send an expiration notice.

⇨ Enter the number of days prior to the passbook expiration to send the notice in the DAYS PRIOR TO COUPON EXPIRATION field.

The COUPON CODE TYPE field is used to determine the type of coupon to send to the customer.

⇨ Select the type of coupon to create in the COUPON CODE TYPE field.



⇨ Enter a coupon code for the notification in the COUPON CODE field.

Each notification should have text for when the notification appears in the app.

⇨ Enter the text for the in-app notification in the IN-APP NOTIFICATION field.

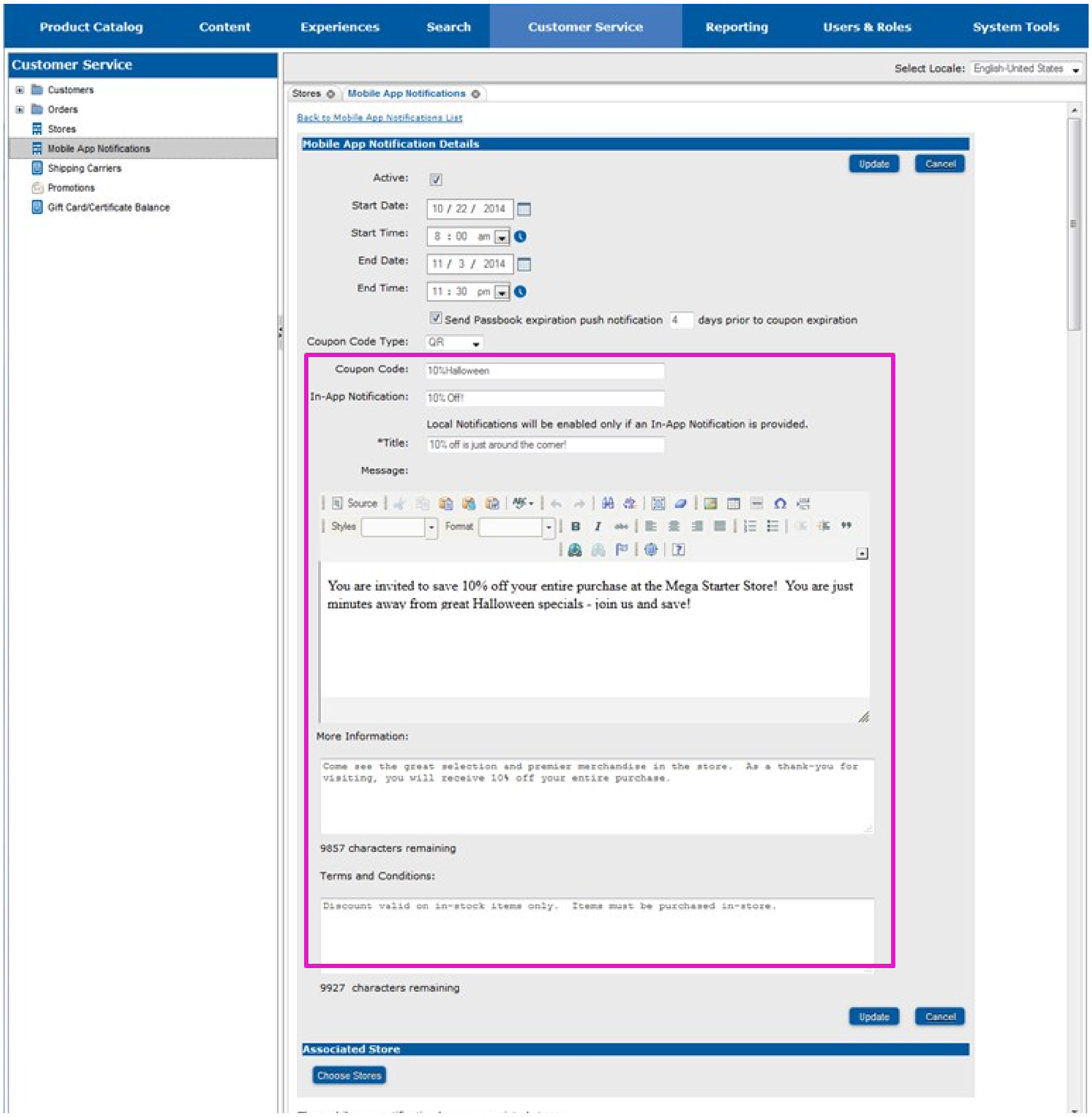
A detailed message should be entered for the notification. The message describes the notification and why the customer should visit the store.

⇨ Enter the notification message in the MESSAGE field.

Addtional information on the notification, as well as terms and conditions, should be entered for it.

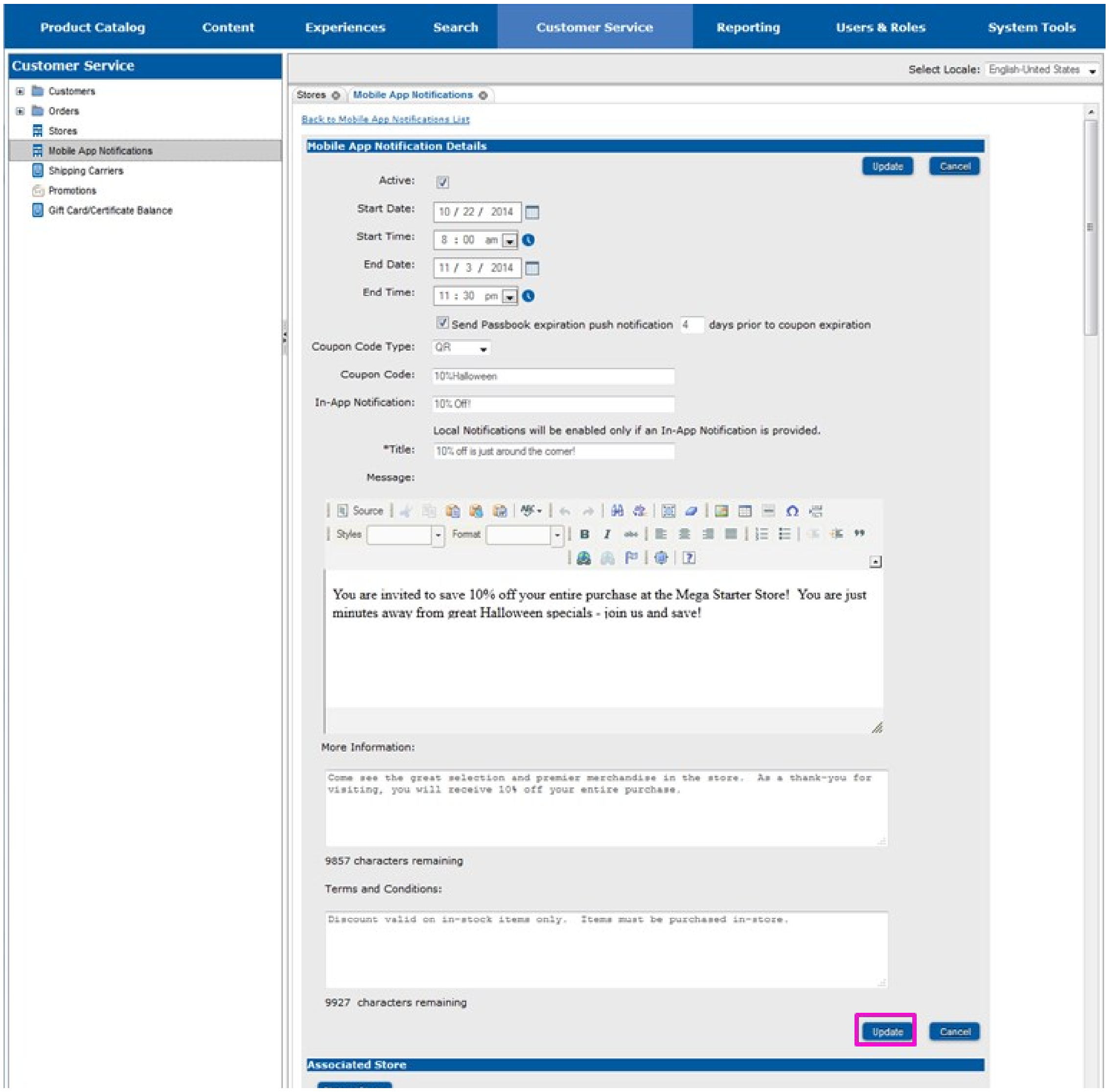
⇒ Enter additional information for the notification in the MORE INFORMATION field.

⇒ Enter the notification's terms and conditions in the TERMS AND CONDITIONS field.

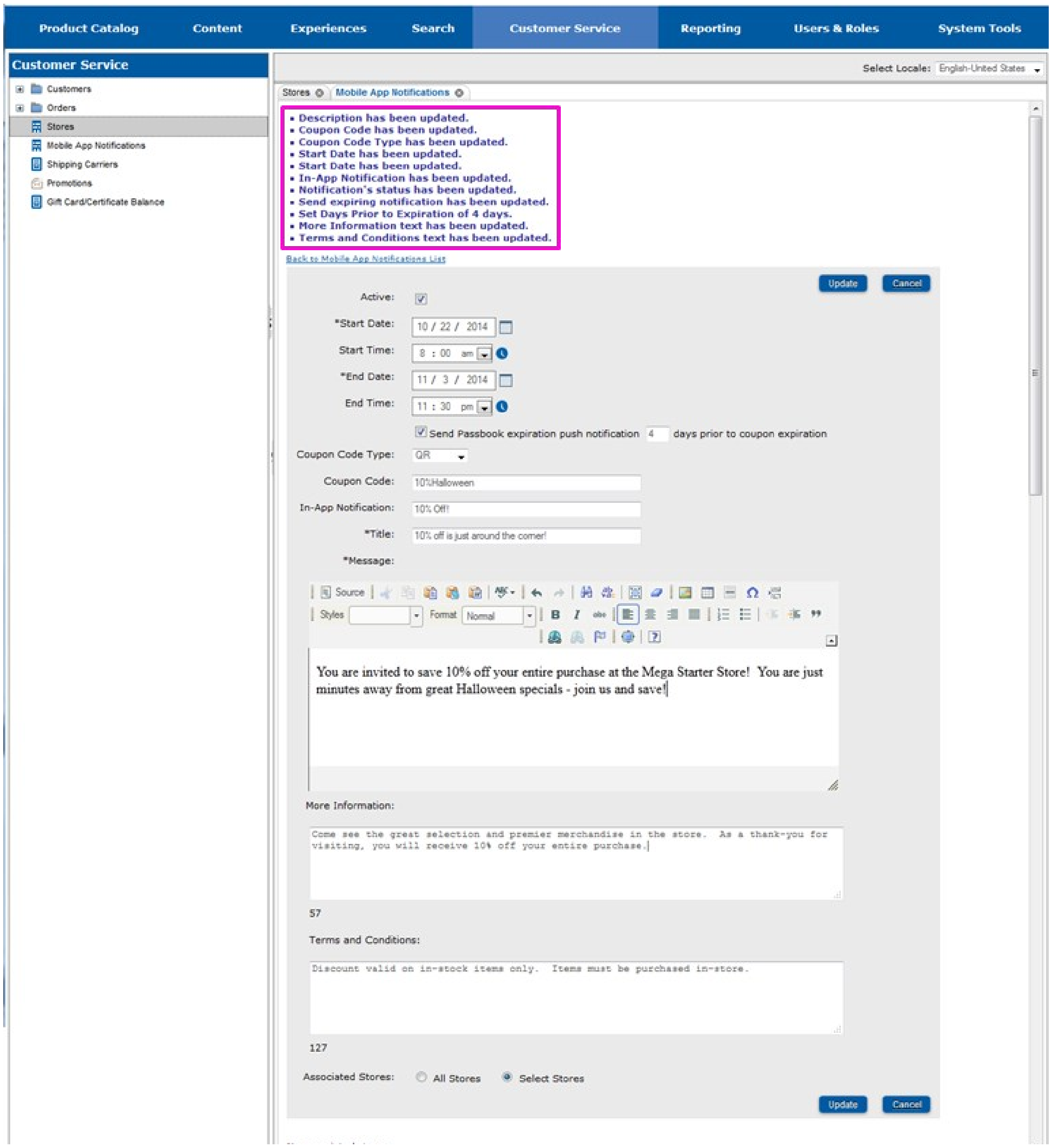


The information that has been entered should be saved.

⇨ Select the UPDATE button.

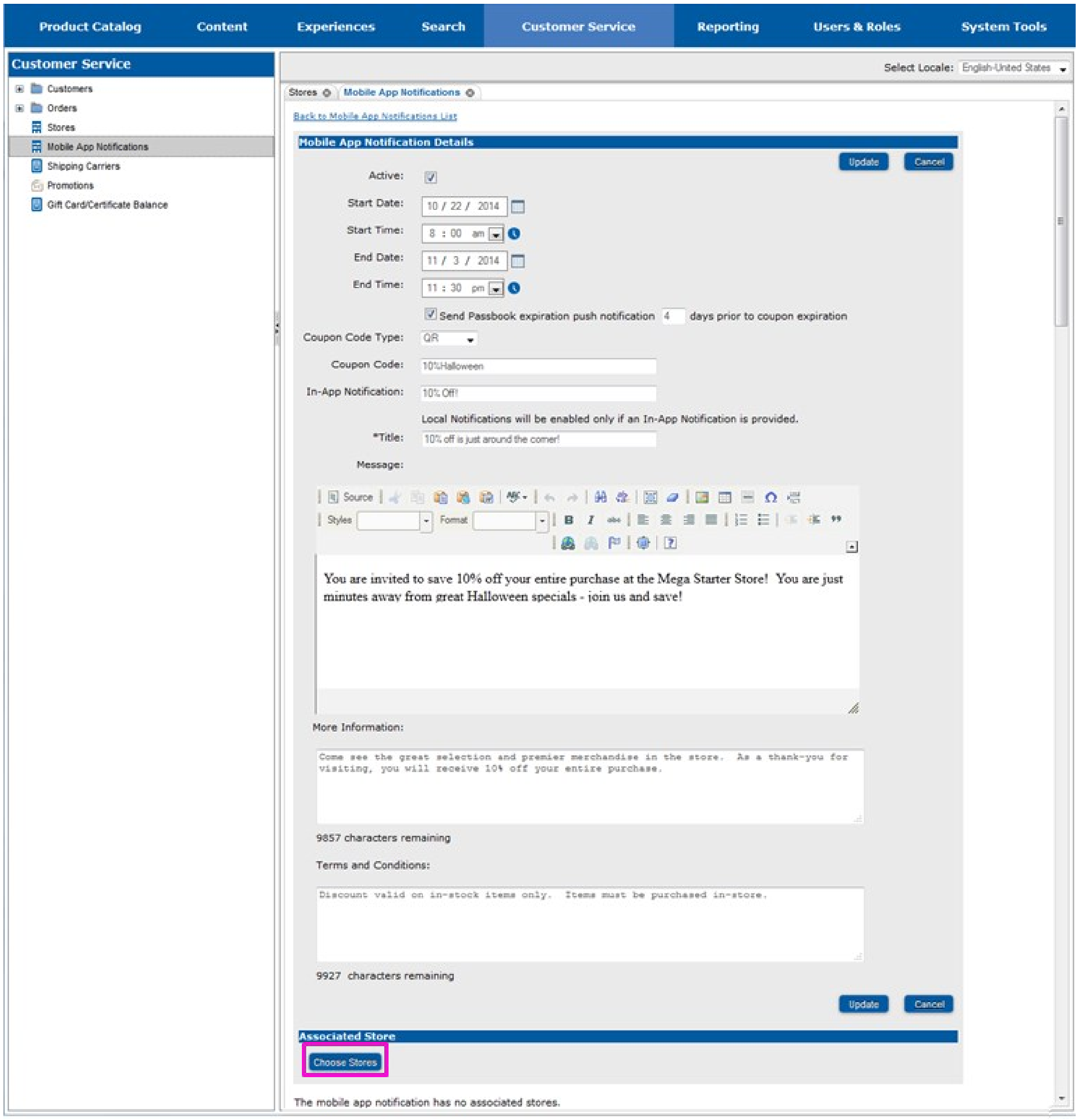


The screen will redraw and messages will appear that indicate that the information has been saved.



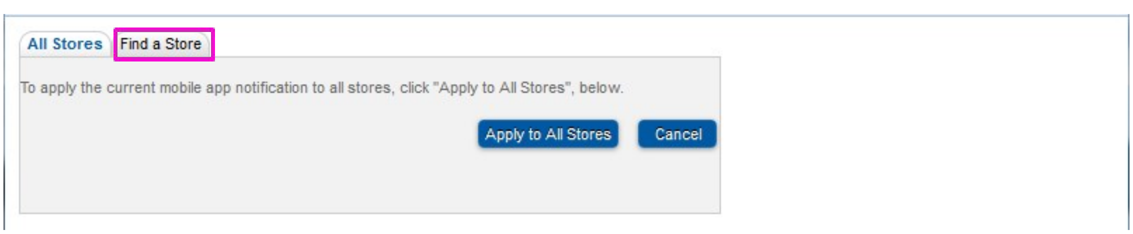
The notification needs to be associated with the store.

⇒ Select the CHOOSE STORES radio button.



A pop-up window will appear which will allow you to select a store or stores.

⇒ Select the FIND A STORE tab.

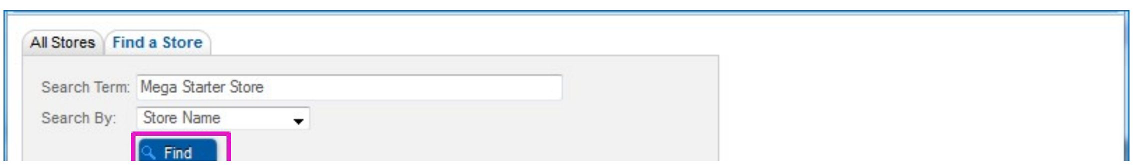


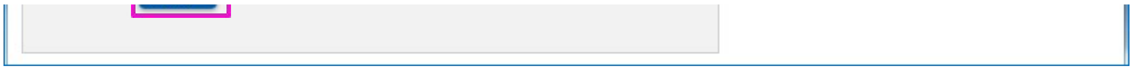
Fields to search for stores will appear.

⇒ Enter the name of the store as the SEARCH TERM .

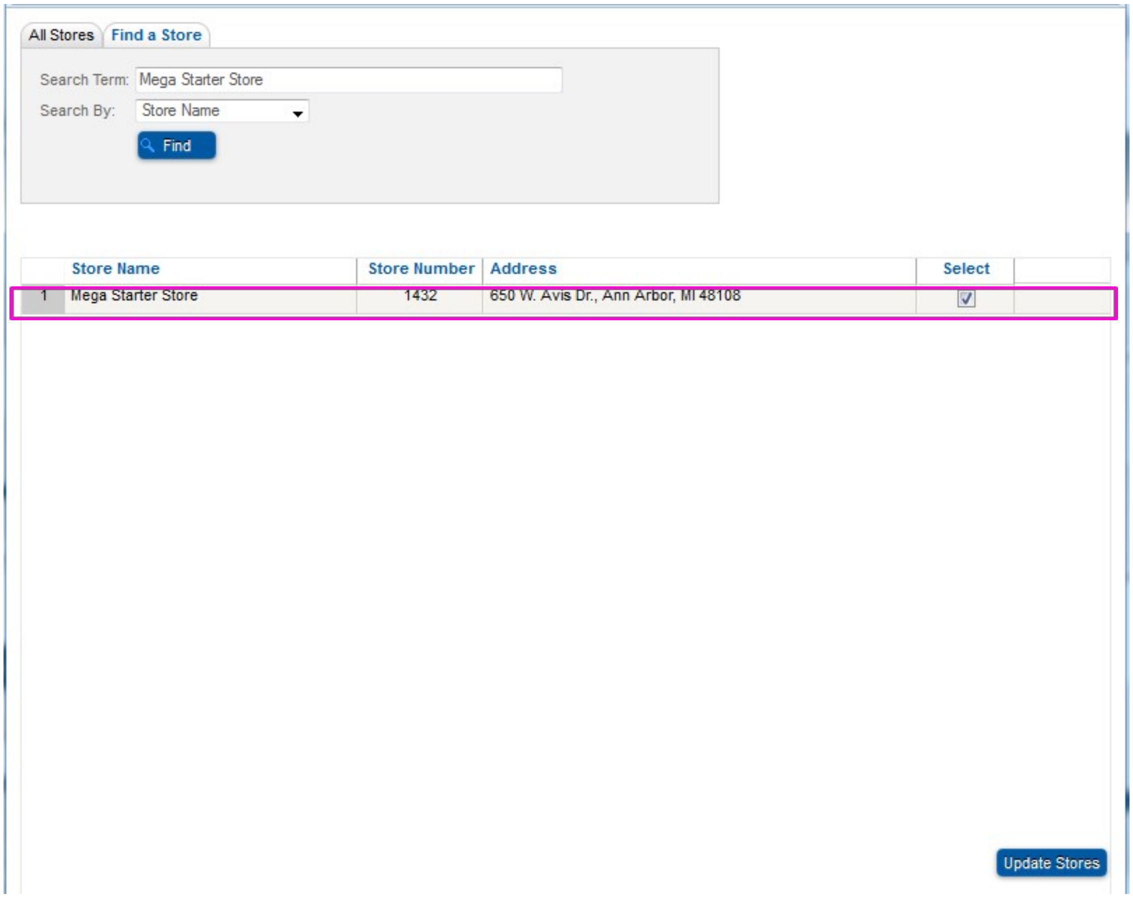
⇒ Select STORE NAME as the SEARCH BY method.

⇒ Select the FIND button.



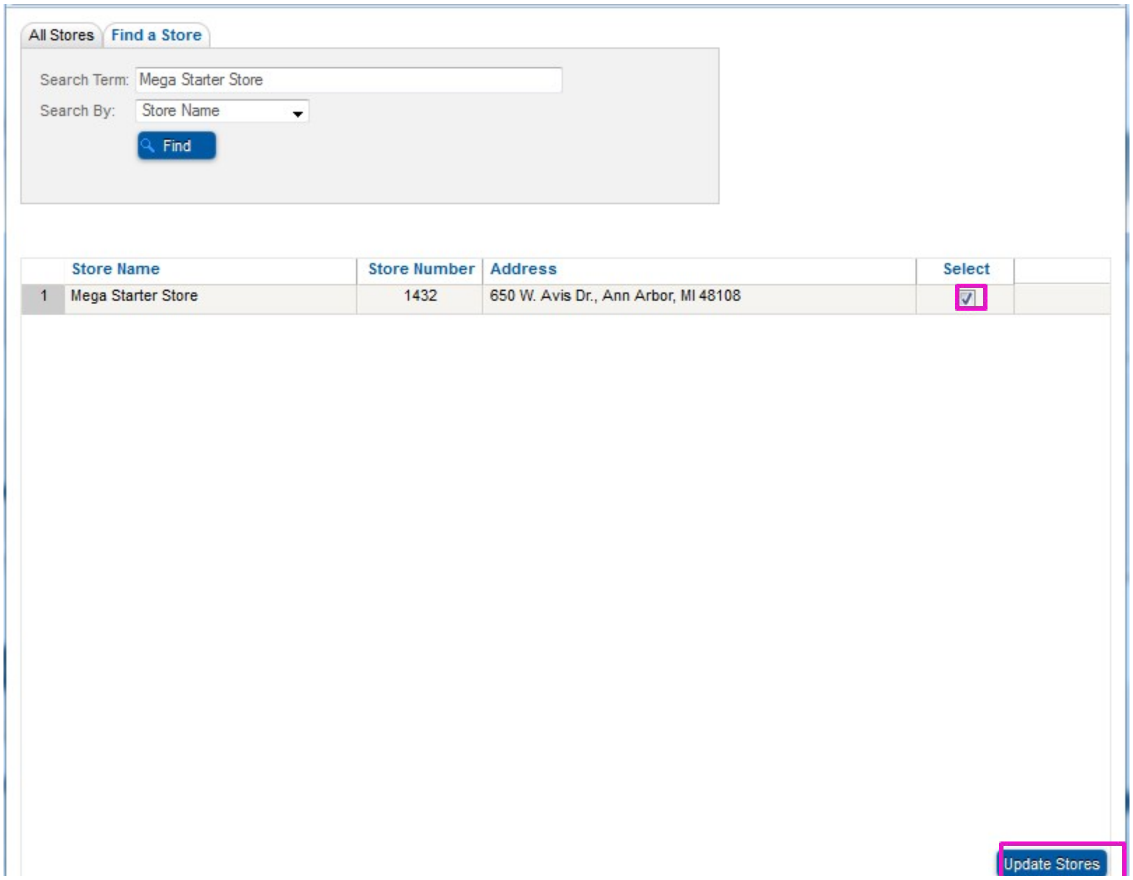


The window will refresh and the name(s) of matching stores will appear at the bottom of the window.

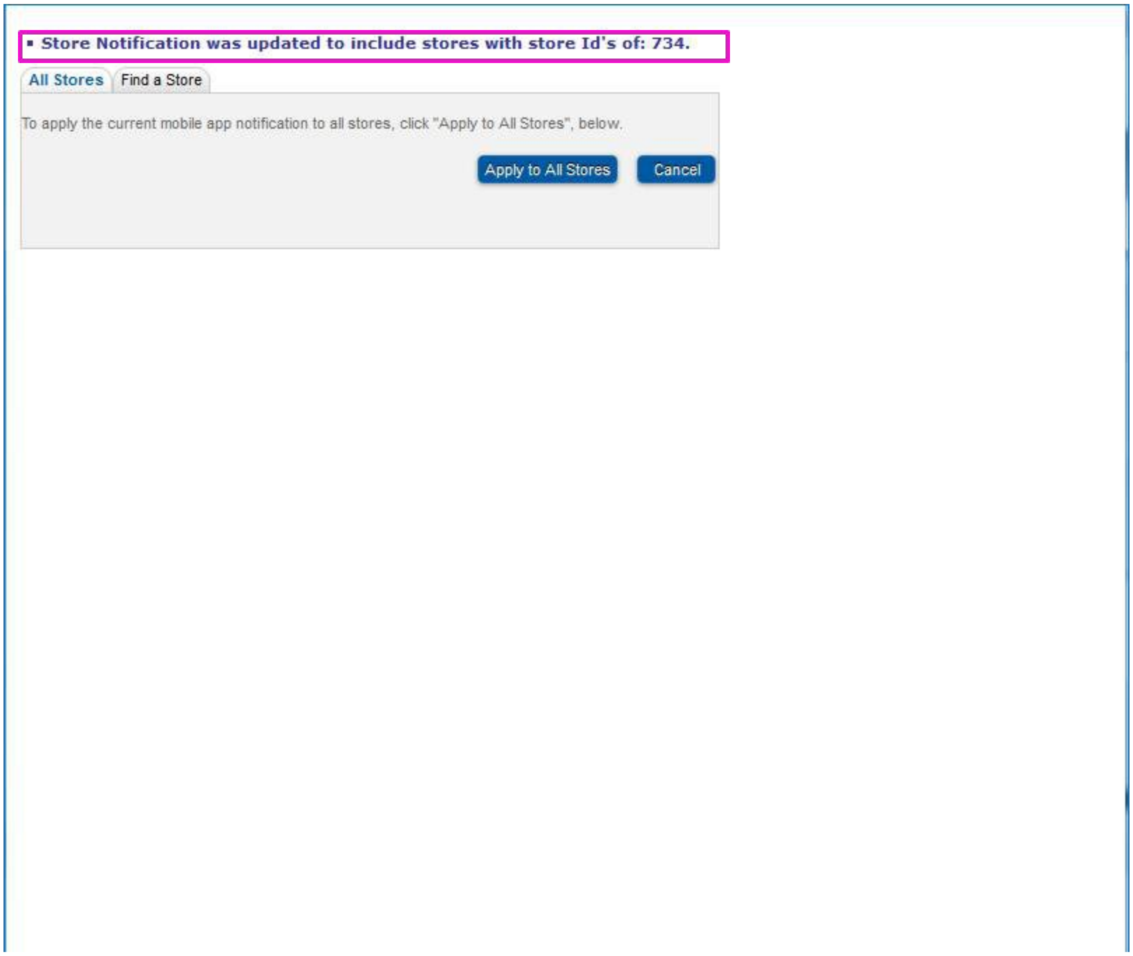


⇒ Select the SELECT icon for every store that you wish to associate the notification with.

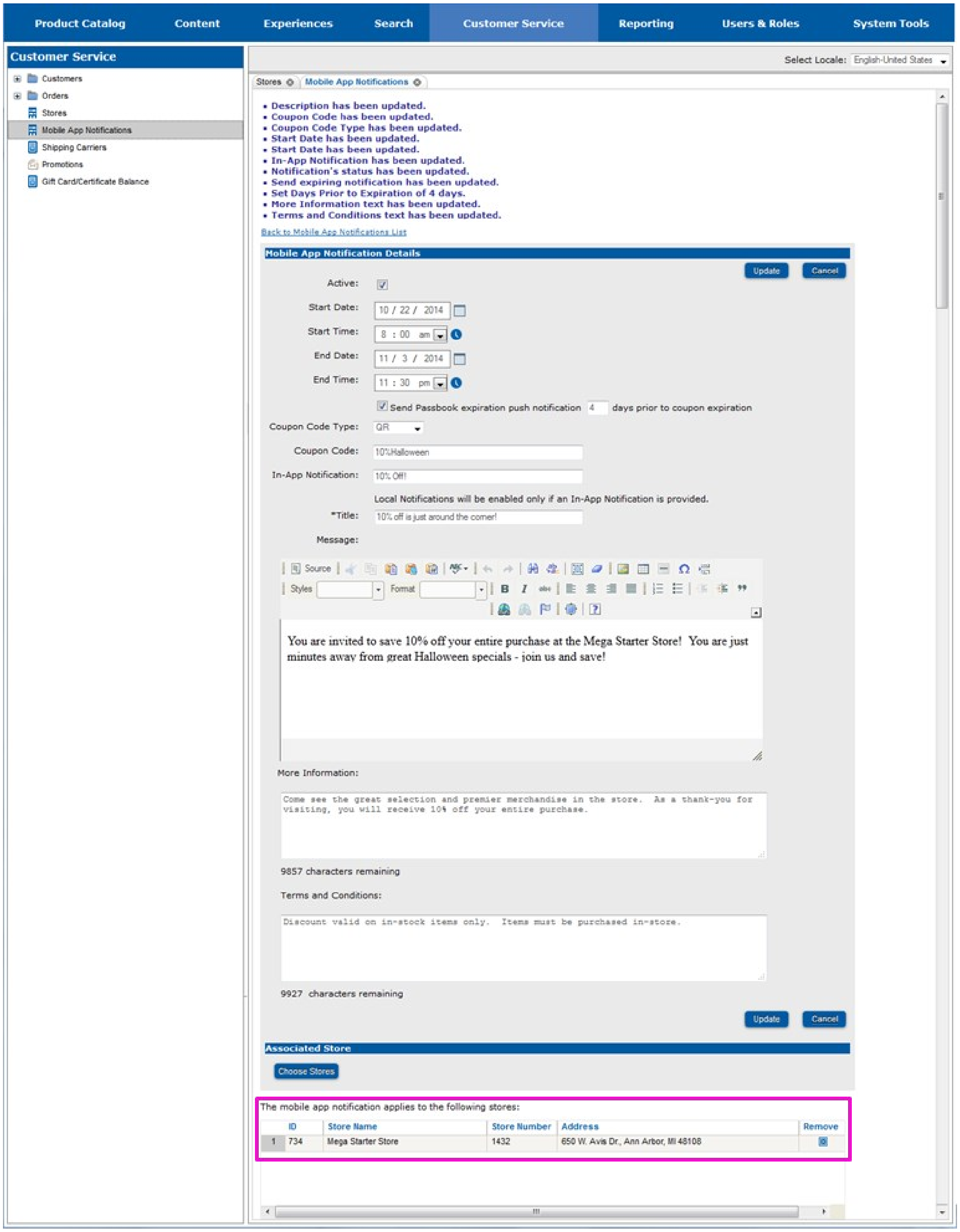
⇒ Select the UPDATE STORE button.



A brief message will appear on the pop-up window indicating that the store notification has been updated to include the selected store(s).



The pop-up window will dismiss, and a message will appear on the main screen showing that the notification has been associated with the store.



Continue on to section ***View New Items on a Store Locator Page*** if you want to view the store on the store locator page.

See also

Before You Begin
The Examples Used
Work With a Store

Add a Store
Add a Store Event
Add a Store Image
Modify SEO Data
View New Items on a Store Detail Page

Modify SEO Data

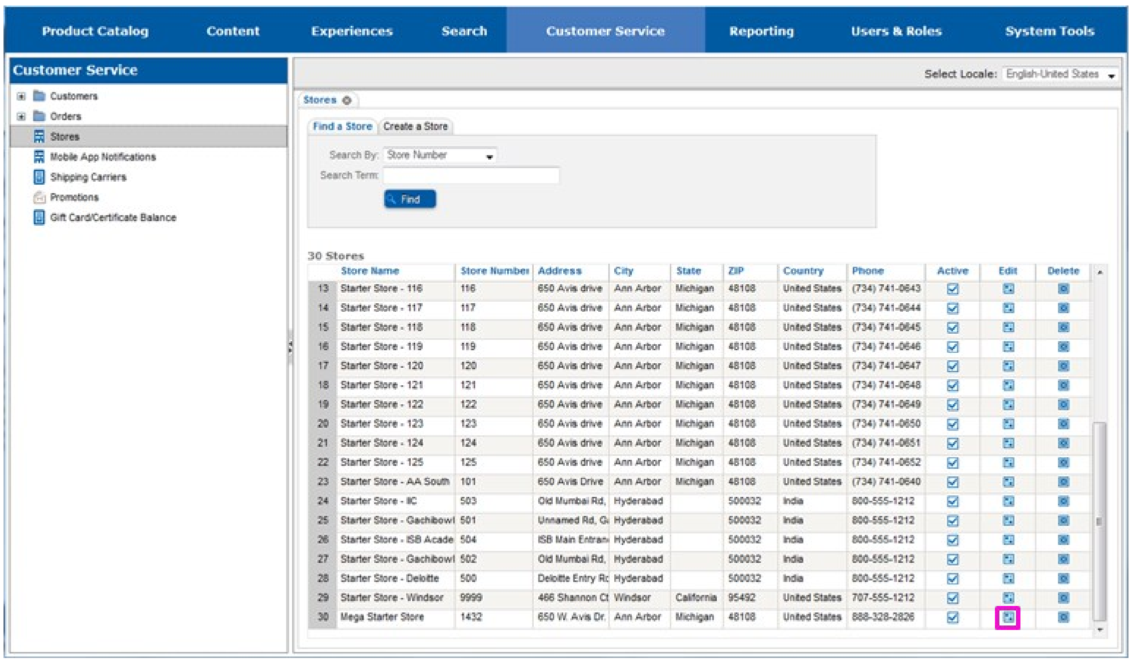
Setting SEO values for the store will help maximize the number of times the store will be found during internet searches.

To complete these steps, you will need to be in the CUSTOMER SERVICE -> STORES portion of the Site Manager. If you are unsure where that section is, see ***Work With a Store***.

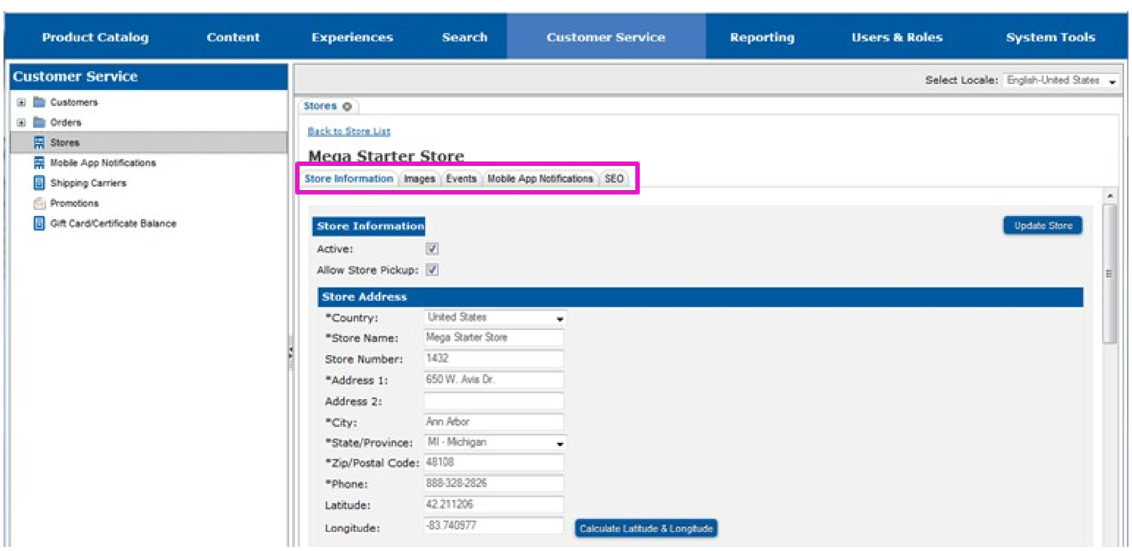
You will edit the store that you are modifying the SEO data for.

⇨ Locate the store you will be changing SEO data for.

⇨ Select the EDIT button for the store.

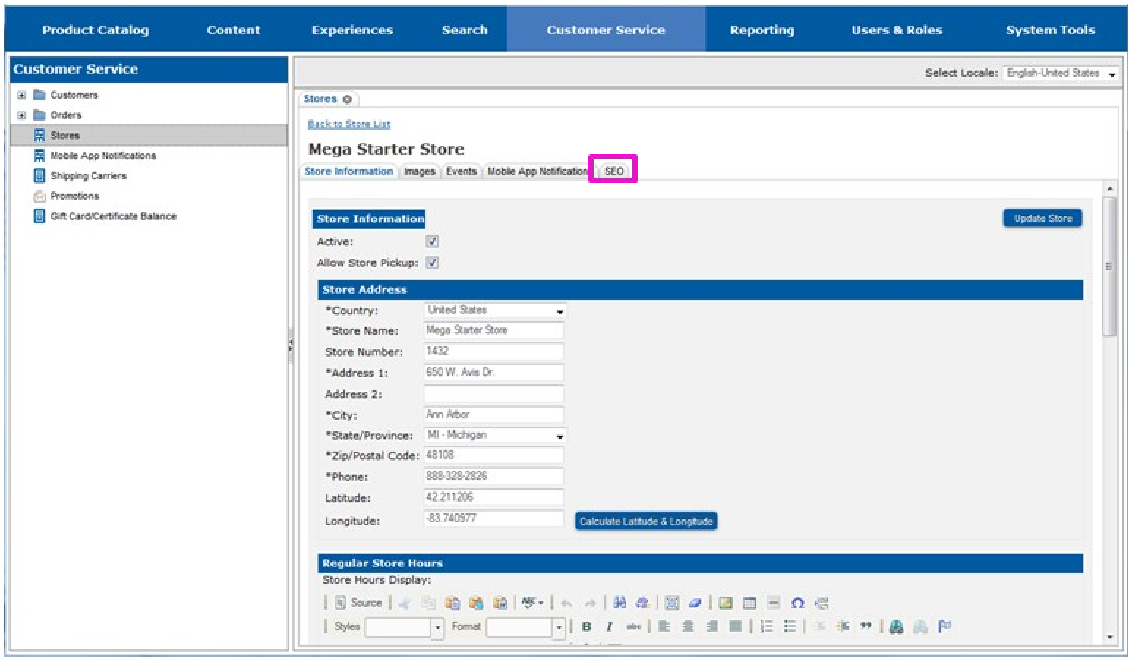


The page will redraw and you will see multiple tabs for the store.

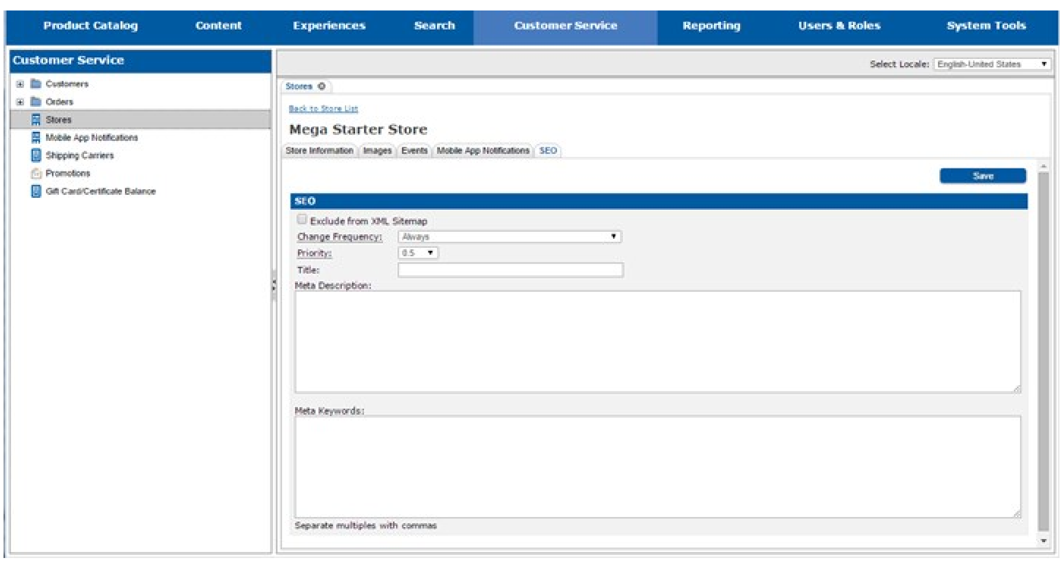


You will be working in the SEO tab.

⇒ Select the SEO tab.

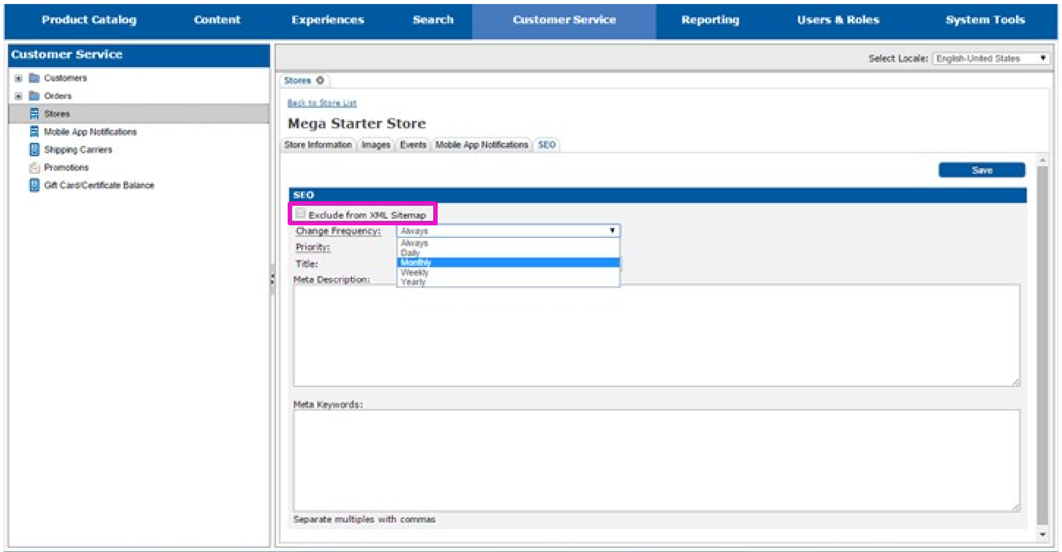


The page will redraw and you will see fields for the SEO data for the store.



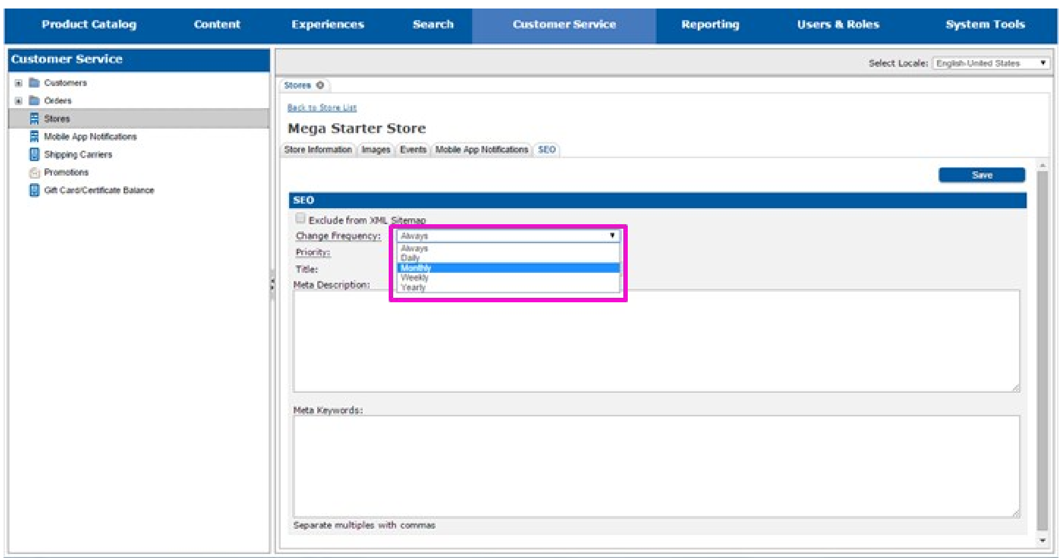
Store detail pages are included in the sitemap that is generate for the store. If you do not want the page included in the sitemap, you can specify to have it excluded.

⇨ Select the EXCLUDE FROM XML SITEMAP checkbox to remove the store's detail page from the sitemap.



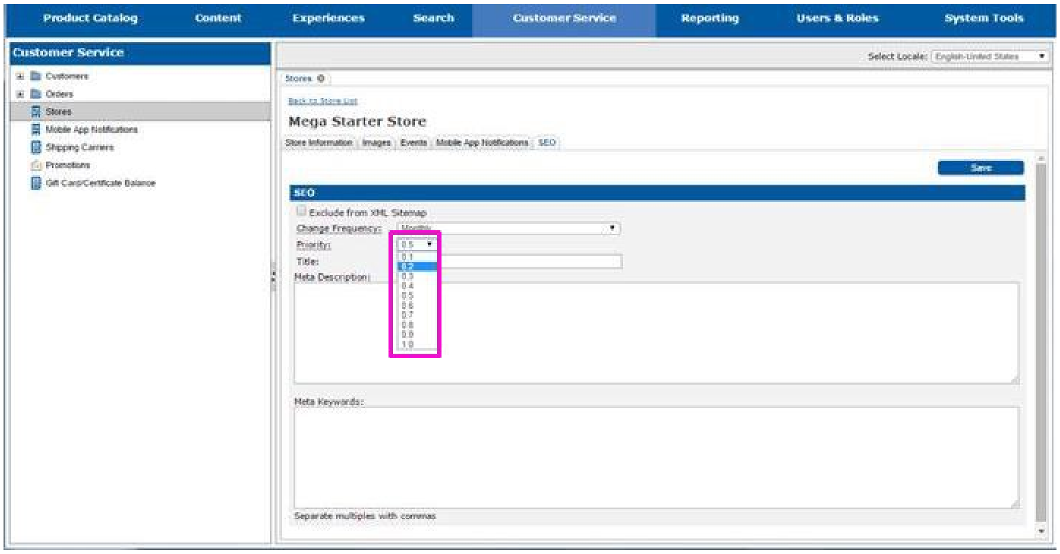
Each page that is included in the site's sitemap includes a frequency field, which indicates how often the page is modified.

⇨ Select the change frequency of the page in the CHANGE FREQUENCY drop-down.



Each page that is included in the site's sitemap includes a priority field, which indicates how important the page is compared to the rest of the pages from the site that are included in the sitemap. The higher the priority, the greater the importance of the page.

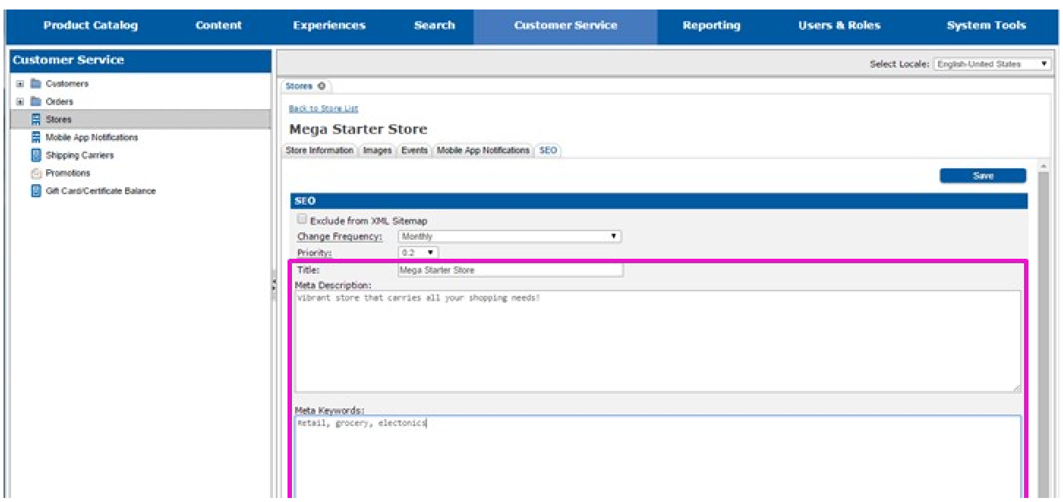
⇒ Select the priority of the page in the PRIORITY drop-down.



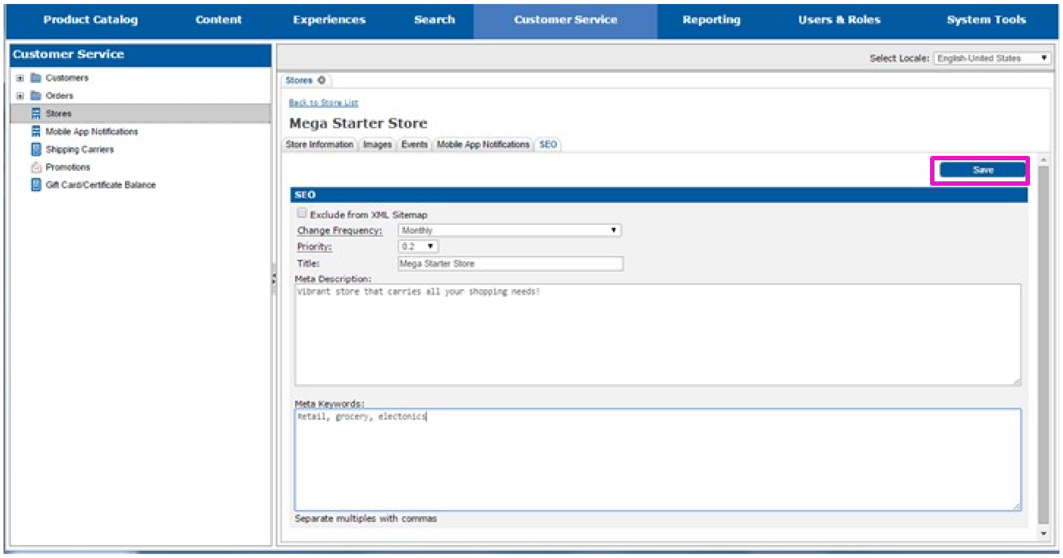
⇒ Enter a new SEO title for the store in the TITLE field.

⇒ Enter an SEO description for the store in the META DESCRIPTION field.

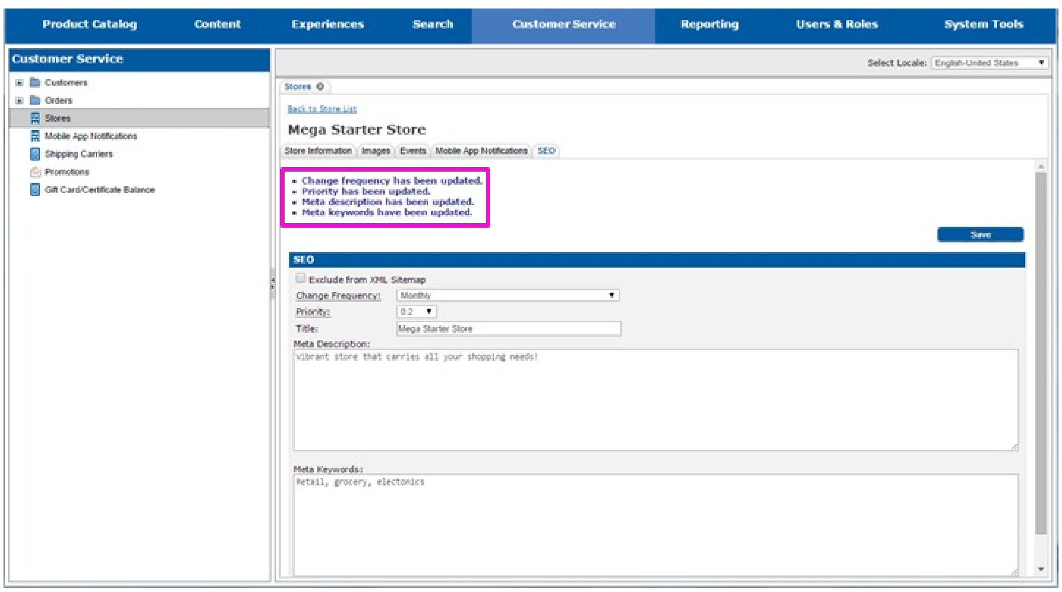
⇒ Enter additional meta keywords for the store in the META KEYWORDS field. Separate the keywords with a comma.



⇨ Select SAVE to save your changes.



The screen will redraw and you will see a message that indicates your modifications have been saved.



The SEO values are now set for the store. Continue on to section ***View New Items on a Store Locator Page*** if you want to view the new store on the store locator page.

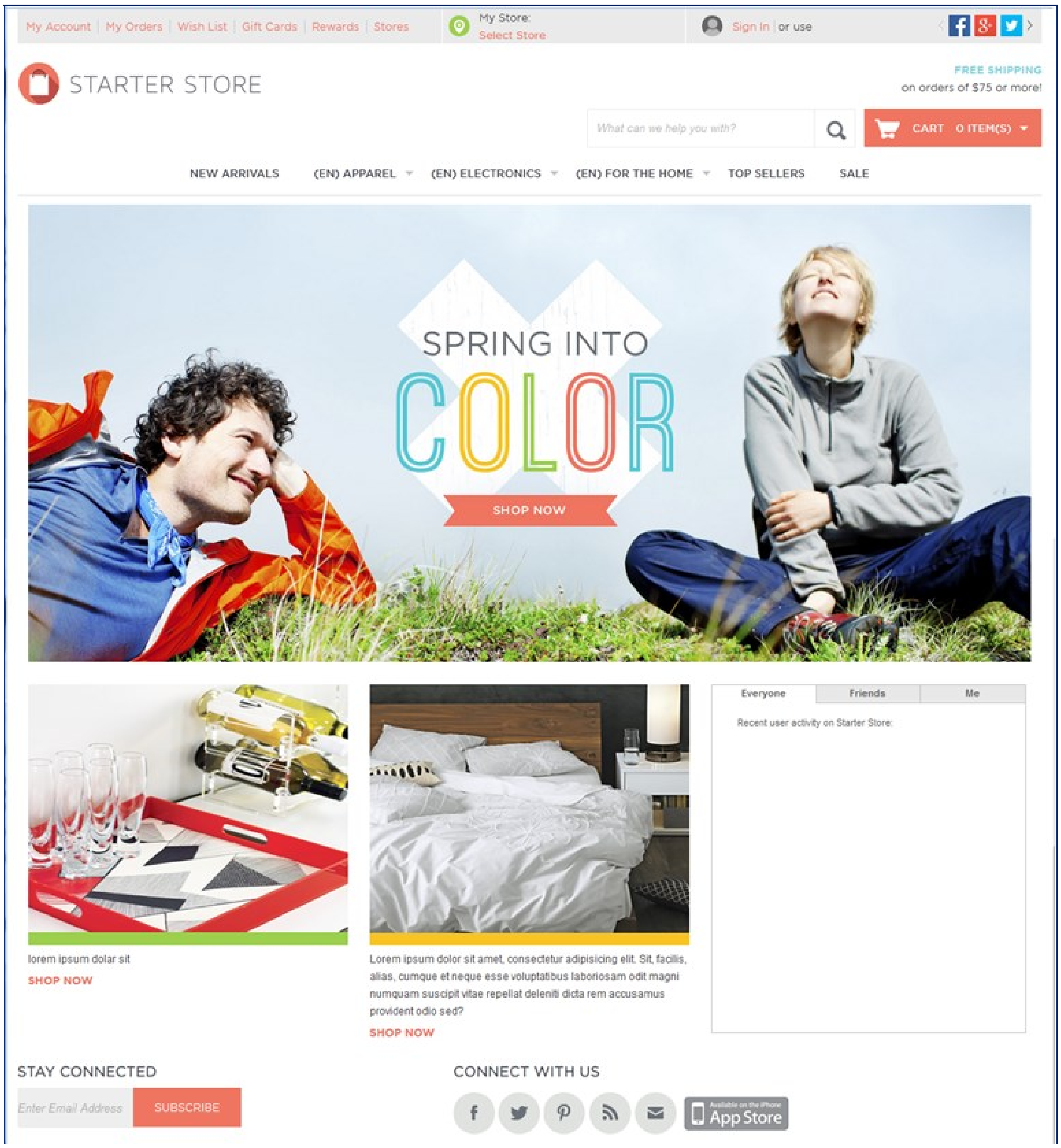
See also

Before You Begin
The Examples Used
Work With a Store
Add a Store
Add a Store Event
Add a Store Image
Add a Store Notification
View New Items on a Store Detail Page

View New Items on a Store Detail Page

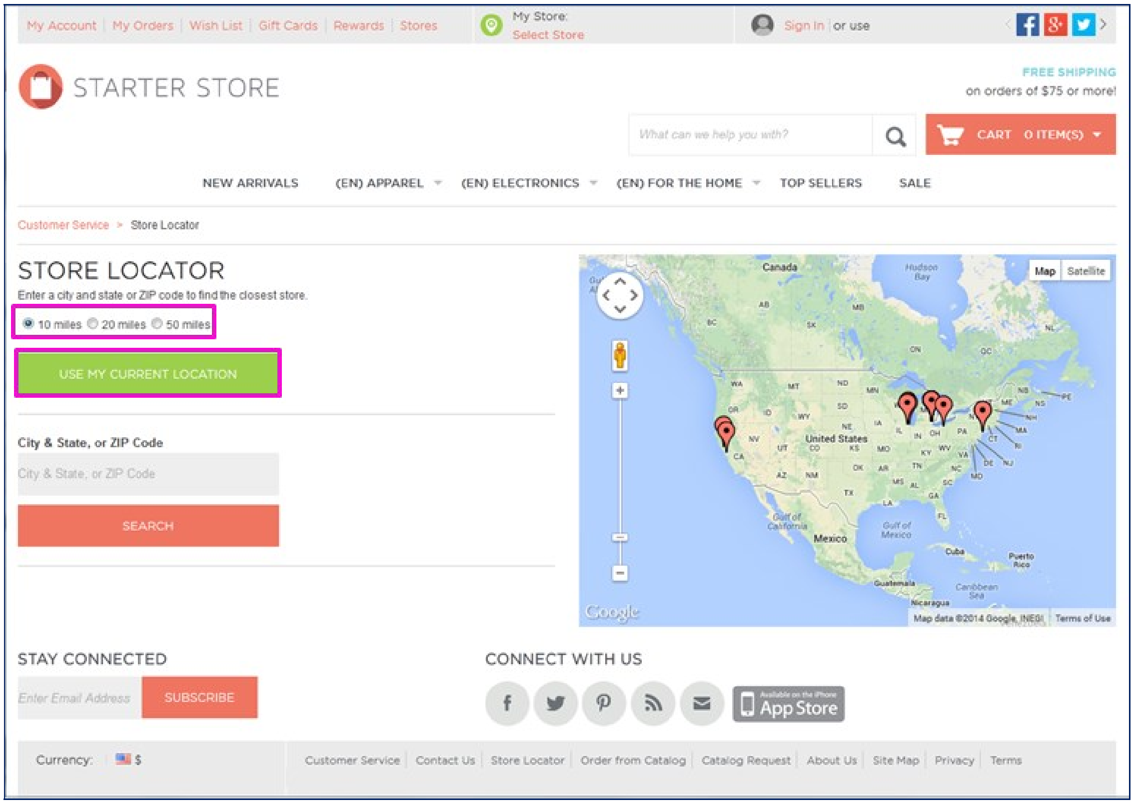
Newly added stores and store events are immediately available on store detail pages. To view them on the page, you need to navigate to the page on your website. The following instructions and screenshots are particular to a specific website. You may need to follow different instructions for your website and your store detail page may look different.

⇒ In a browser, navigate to your website.



⇒ Select the link that will take you to your store locator page.

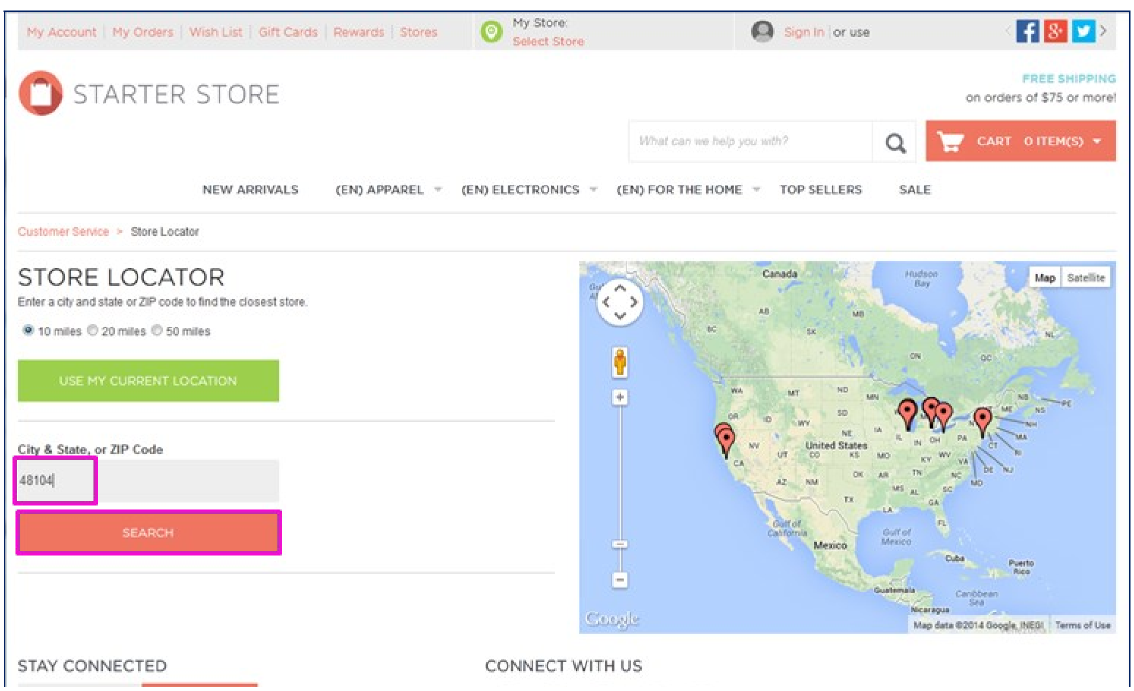
That page will redraw. What you see is dependent upon your site. You may see a default map, with locations indicated, or you may need to enter or select information before seeing a map.

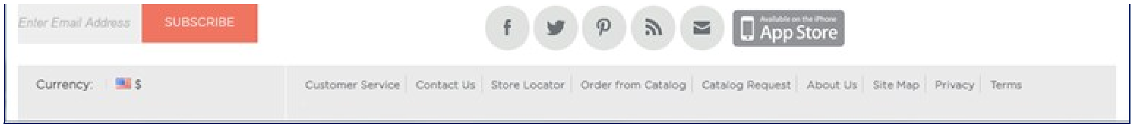


You will need to enter information appropriate to the new store or the store you added the new information to in order to zoom in on that store on the map.

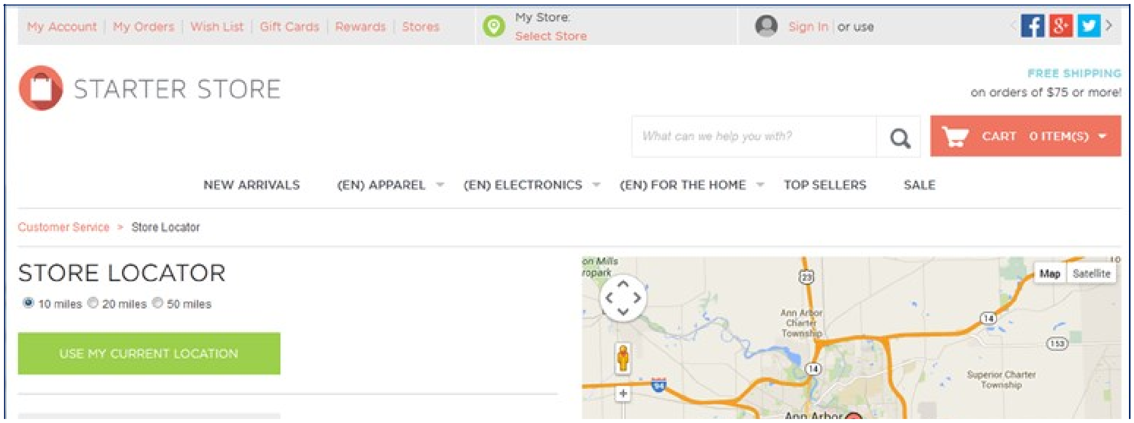
⇒ Enter address information for the store.

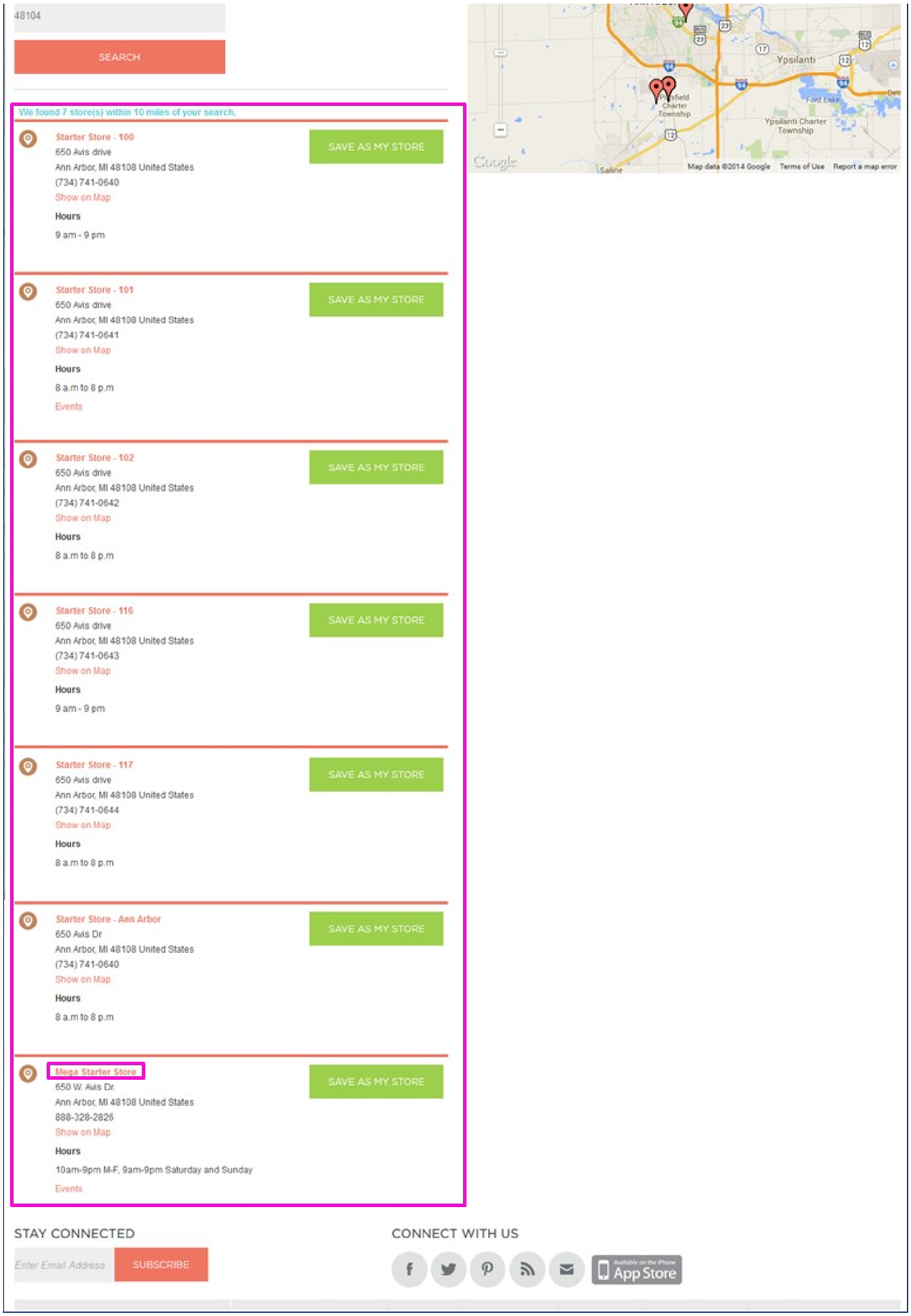
⇒ Select SEARCH.





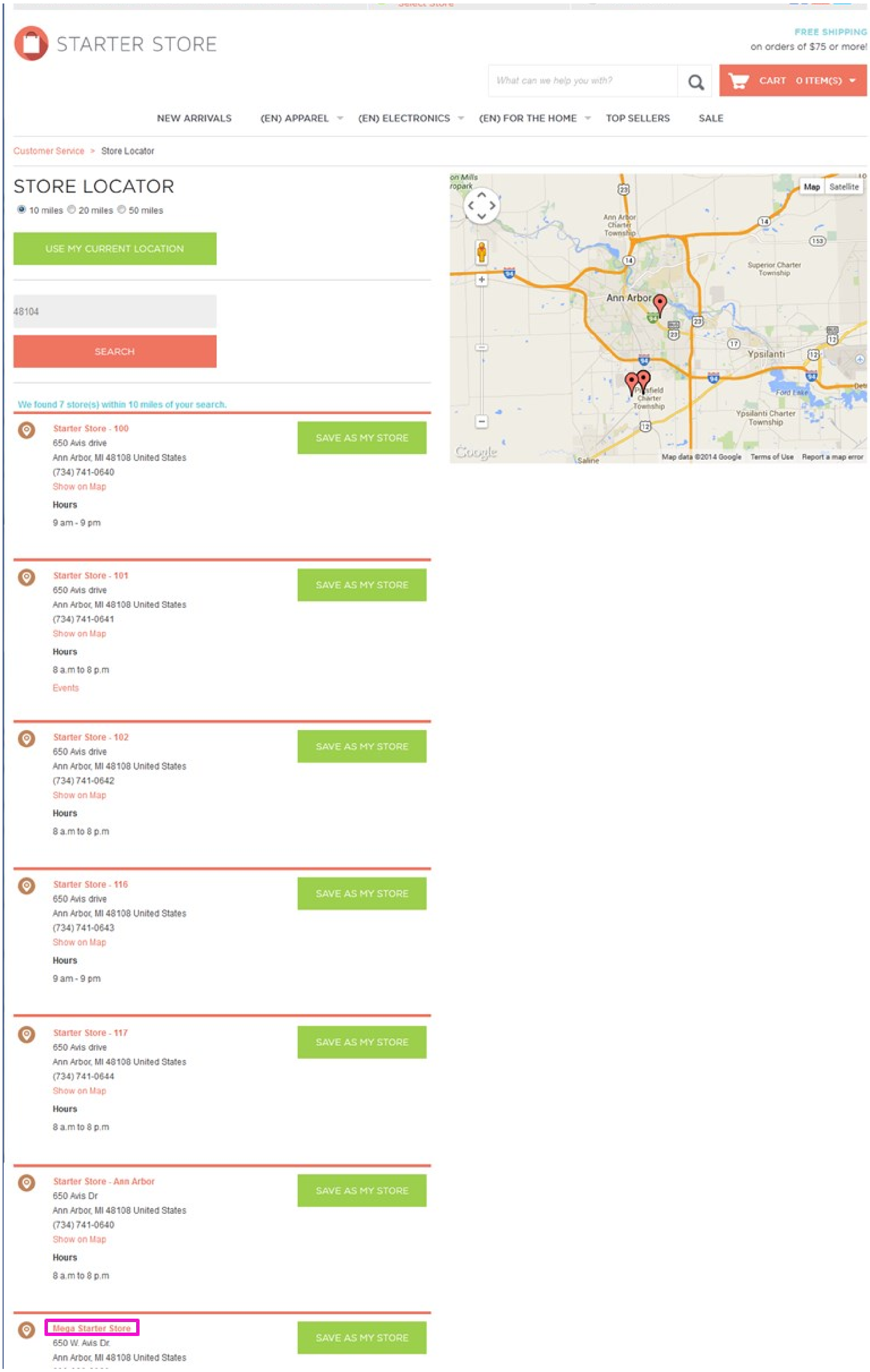
The page will redraw and you will see the search results page. On the search results page you will see the stores that matched your search criteria. Locate the store you modified. If you are searching on a date that is within the dates for the special hours notification, you will see the notification text. If you are outside of the dates of the special store hours, or you didn't enter any special store hours, you will see the regular store hours.

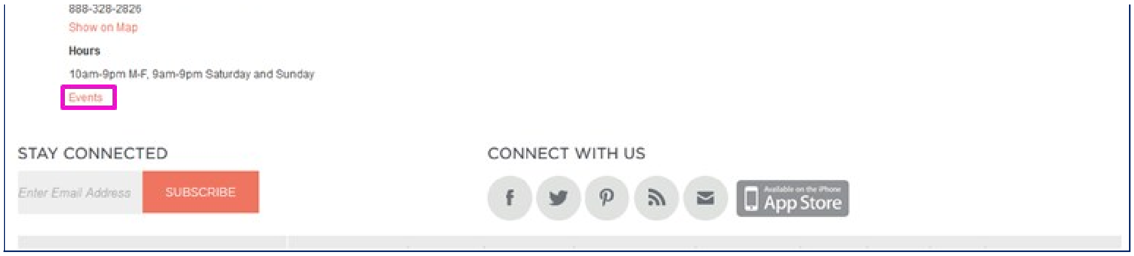




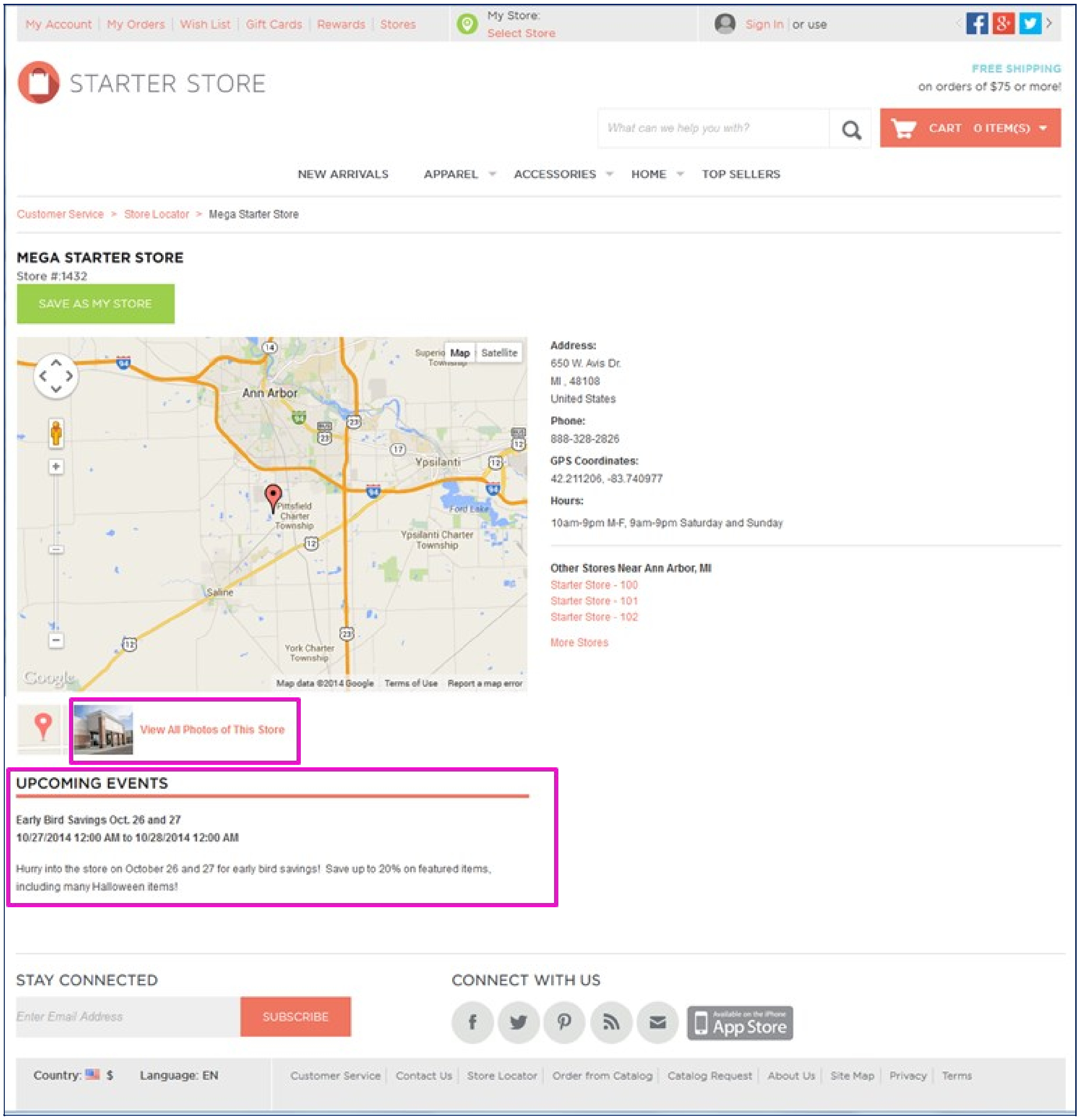
If you entered special store hours and you are within the time frame for the special store hours, you will see the special store hours.

⇨ Select the store name to go to the store's detail page.


STARTER STORE
FREE SHIPPING
on orders of $75 or more!
What can we help you with?
CART 0 ITEM(S)
NEW ARRIVALS
(EN) APPAREL
(EN) ELECTRONICS
(EN) FOR THE HOME
TOP SELLERS
SALE
Customer Service > Store Locator
STORE LOCATOR
10 miles
20 miles
50 miles
USE MY CURRENT LOCATION
48104
SEARCH
We found 7 store(s) within 10 miles of your search.
Starter Store - 100
650 Avis drive
Ann Arbor, MI 48108 United States
(734) 741-0640
Show on Map
Hours
9 am - 9 pm
SAVE AS MY STORE
Starter Store - 101
650 Avis drive
Ann Arbor, MI 48108 United States
(734) 741-0641
Show on Map
Hours
8 a.m to 8 p.m
Events
SAVE AS MY STORE
Starter Store - 102
650 Avis drive
Ann Arbor, MI 48108 United States
(734) 741-0642
Show on Map
Hours
8 a.m to 8 p.m
SAVE AS MY STORE
Starter Store - 116
650 Avis drive
Ann Arbor, MI 48108 United States
(734) 741-0643
Show on Map
Hours
9 am - 9 pm
SAVE AS MY STORE
Starter Store - 117
650 Avis drive
Ann Arbor, MI 48108 United States
(734) 741-0644
Show on Map
Hours
8 a.m to 8 p.m
SAVE AS MY STORE
Starter Store - Ann Arbor
650 Avis Dr
Ann Arbor, MI 48108 United States
(734) 741-0640
Show on Map
Hours
8 a.m to 8 p.m
SAVE AS MY STORE
Mega Starter Store
650 W. Avis Dr.
Ann Arbor, MI 48108 United States
SAVE AS MY STORE
Map
Satellite
Ann Arbor
Ypsilanti
Superior Charter Township
Ann Arbor Charter Township
Pittsfield Charter Township
Ypsilanti Charter Township
Ford Lake
Saline
Map data ©2014 Google
Terms of Use
Report a map error



The page will redraw and you will see the detail page for the store. The detail page will have the store hours, the store photo, and the store events. If you entered notification text for special store hours and you are within the time frame to display it, the notification text will be displayed.



See also

Before You Begin
The Examples Used
Work With a Store
Add a Store
Add a Store Event
Add a Store Image
Add a Store Notification

Modify SEO Data

Legal Notices