COMMERCE





User Guide Version | R3

EPiSERVER

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Introduction	5
About This Documentation	5
Accessing EPiServer Help System	6
Online Community on EPiServer World	
Copyright Notice	
About EPiServer Commerce	
Introduction	
The EPiServer Commerce Sample Site	
Function Overview	
Roles	
Shopping Workflow	
Getting Started	14
Introduction	14
Logging In	14
Access Options	14
Navigation	15
Commerce Manager	16
Dashboard	
Customer Management	
Catalog Management	53
Order Management	
Marketing	
Assets	154
Reporting	
Administration	
Access Rights	
Introduction	
Contacts and Accounts	
Defining User Access	
Globalization	
Language Settings	
Searching	
Introduction	
Accessing Search	
How to Search	231
Displaying Search Results	
Administering and Configuring Search	
Search in EPiServer Commerce	
Sample Site	233
Introduction	
Site Structure	
Sample Pages	234
Page Types	234
Payment Providers	
Payment Providers Available with the Sample Site	270
Faceted Navigation	271
Personalization	
Social Features	
Gadgets	

Tools and Plug-ins	
Scheduled Jobs	
Defining Display Templates	
Sample Catalog Import	
Managing Content	
Introduction	
Editorial Content	
Community Content	

Introduction

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



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

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

About This Documentation

Target Groups

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

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

References

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

be useful for reference purposes:

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

Accessing EPiServer Help System

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

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

Online Community on EPiServer World

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

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About EPiServer Commerce

Introduction

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

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

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

EPiSer	ver Commerce					
Add-Ons Website						
	EPi Friendly URL Pe	Server CMS rsonalization	Glob	alization		
EPiSer	Bu	siness API				
ver On	Catalog Management Markets					
lineCe	Asset Management Reports Order Management Marketing & Promotions			Work		
nter				flows		
	Customer Management Commerce Administration					
EPiServer Framework						

EPiServer Commerce contains the following parts:

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

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

The EPiServer Commerce Sample Site

EPiServer Commerce comes with a sample site including a complete set of page templates containing all the necessary functions for setting up a website with an online store. The purpose with the sample site is to exemplify and illustrate the code behind the templates, and to provide inspiration when building your own e-commerce solution. Refer to the *Sample Site* section for more information.

Function Overview

Introduction

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

(i)

The documentation describes a **sample installation** based on the sample template package of EPiServer Commerce. Please be aware that your specific system may differ from what is described here, since your website is most likely customized and may be integrated with additional systems.

Store Management

Administering and Configuring the Store

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

Administrating Users and Customers

Users and customers are managed by the *Customers* system. Users are internal to your organization and should not be confused with customers, partners and organizations. Generally, only your team of internal users will have access to the administrative parts, and depending on their permissions will have varying access to the systems and menu items within each system.

Catalogs and Product Entries

The *Catalogs* system provides users with the ability to manage catalogs, product categories and products. Products are arranged into a particular catalog. Catalogs are independent from one another and you may create as many catalogs as you need. Catalogs can be structured in a number of ways and organized into Categories, Products, SKUs, Bundles, Packages and Dynamic Packages. The Enoteca sample site includes a sample catalog with products, SKUs, and packages.

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

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

Customer Campaigns, Promotions, and Discounts

The *Marketing* system handles for instance promotions. A promotion is a marketing tool used to increase sales of certain products or product lines. Various incentives such as lowered pricing and other discounts

can be employed as part of a promotion. Either you can create a promotion that is visible prior to checkout or you can configure the promotion to be displayed during the checkout process.

The most powerful aspect of the Marketing system is the workflow engine which allows variable conditions to be applied when creating a promotion. These conditions vary from the number of items, the percentage discount, shipping rates and many others. Marketing teams also have the ability to target specific customer segments by region, individual customers or customer groups.

Assets Management

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

Content Management

Working With Content

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

Administering the Website

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

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

Roles

Introduction

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

Visitor

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

Merchandiser

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

Marketer

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

Store Administrator

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

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

System Administrator

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

Website Administrator

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

Website Editor

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

Website Owner

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

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

Shopping Workflow

Introduction

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

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

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

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

Step-by-Step Process

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

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

Shopping Process



1. Cart created

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

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

2. Start checkout

When the shopper decides to complete the purchase and chose to "proceed to checkout", the first step of the **checkout** procedure is initiated.

3. Add address

In the second step of the checkout procedure, the **shipping and billing address** information is added together with the preferred type of delivery (First class/Express etc). The address information can be entered manually by an "anonymous" shopper, or automatically if the shopper is logged in and has a registered user profile with address information. The system can also be set up so that it is possible to **split shipments** in different parts and to different addresses here.

4. Add payment

In step three of the checkout procedure, the **payment** is added to the "purchase order to be". The system will calculate the total sum including the purchase amount and the **shipping fee**. In this step the shopper selects a payment method, for instance by credit card or PayPal. The payment will be registered and verified. This may happen instantly or after a certain specified time, depending on how the payment process is set up and the type of e-commerce solution (B2C or B2B). In this step it is also possible to **split payments**, if the system is configured for this.

5. Order created

Usually the actual **purchase order** is created in the system when the payment is settled. In the last checkout step, a purchase order number is created, the shopper confirms the purchase, and an order confirmation is sent to the shopper. The shopping cart is now converted to a purchase order which is visible with status "In Progress" under "Purchase Orders" in Orders.

6. Order processing

When the order is created the order processing starts. This consists of steps to check the warehouse and inventory status for the products in the order, and for creating the actual **shipment**. Depending on the inventory status for the products, the order may be split into more than one shipment.

7. **Shipment released** - when the shipment is verified, it will be **released**. The purchase order will now appear in Orders, under "Shipping/Receiving" and "Released for Shipping".

8. Add to picklist

This steps involves the addition of the shipping items to a **picklist**. The picklist is the list that the warehouse will use to create the **physical shipping** of the products in the order. This step will also produce a **packing slip**, which is the paper slip that will be attached to the physical package to be shipped.

9. Order completed/shipped

When the picklists with the different orders and their respective packing slips have been created, the order will be set to **completed**. In the system this involves the creation of a shipment validation number which is associated with **tracking number**. The tracking number can be entered manually or automatically, if such an integration exists. The tracking number connects the physical package with the shipping provider for the delivery, and is used for tracking the package on its way to the delivery address. The purchase order will now appear in Orders under "Purchase Orders" again, with status "Completed".

10. Return/Exchanges

Only completed orders can be subject to **returns/exchanges**. Depending on how the system is set up, returns can be created automatically or manually. Creating a return usually involves replacing a delivered product with another one in **exchange**, and/or a payment **refund**. When the return is created it will appear in Orders under "Shipping/Receiving" and "Returns". Order status can be for instance "Awaiting Exchange".

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

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

Integration with External Systems

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

Examples of such external systems:

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

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

Getting Started

Introduction

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

Logging In

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

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

enoteca	Your Local Store 1 Park Road Rickmanswoth Hertfordshire WD3 1RE +44 (0)1923 432608	Register Log In My Profile wor Your Basket 0 item(s) Totat: \$0.00 Checkout •
Home Win	ne Mixed Cases	Popular searches 🔽 Enter Search Hare
Log in or create an	account	
Registered Custor	ner	* Required Fields
If you have an account	t with us, log in using your username.	
Username * admin		
Password *		
	Forgot your password?	
Use your Facebook ac	count to log in.	
New Customers		
Register on our site a	nd create your personal profile.	
New to Enoteca? Take advantage of Enote registering.	ca's fine wine collections, education resour	res and special events by

Access Options

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

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



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

Navigation

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

Dashboard	CMS	Commerce	Add-ons
Commerce Ma	nager	Settings	

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



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

Commerce Manager

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

	Dashboard
2	Customer Management
	Catalog Management
1	Order Management
	Marketing
8	Asset Management
	Reporting
F	Administration

Dashboard

Introduction

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

Dashboard View

The dashboard is an aggregated view of a site's status. Typically, the dashboard is the first screen seen that a user sees when he/she logs into Commerce Manager. This is the area where a user can get a quick overall snapshot of e-commerce site, including notifications and alerts, an overall summary of products, categories, orders, customers, and promotions, sales performance graphs, customizable news and announcements, and a search field for help.

Customizing the Dashboard

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

Control	Description
Help	Allows users to search for help topics that links directly to the EPiServer Commerce webhelp site. Enter key terms into the Search field and then click on Search Help . Other frequently asked questions (FAQs) are listed underneath the Search field.
Summary	Displays the total number of Products , Categories , Orders , Customers , and Promotions .

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

Adding Controls and Adjusting the Page Template

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



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

To reset the Dashboard back to the default state before any customizations were made, click on **Set to Default**.

On the Page Template tab, you can adjust the Dashboard page layout to a **One column template**, **Two columns template** (first twice bigger than the second), Two columns template (2nd twice bigger than the 1st), and **Two equal columns template**. Click on the layout you want and then click on **Add and close**.

Information			×
Controls Set	Page Template		
	One c	olumn template	
	Two c	olumns template (first twice bigger than the second)	
	Two c	olumns template (2nd twice bigger than the 1st)	
	Two e	qual columns template	
٠			•
🕏 Set to defau	lit 🛛 🙀 Add and (close Cancel	

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

Summary A	×
🐇 Products: 1320 🗀 Categories: 64 📫 Orders: 17 🕹 Customers: 10 🦉 Promotions: 1	
Help	×
Help will appear in a separate window. Find answers to questions about Commerce Manager containing the terms Examples: Campaigns and Promotions A. How do I Create a New Poduct? b. How do I Create a New Poduct? C. Where is the release history?	

Rearranging, Collapsing, and Removing Controls

To rearrange Controls, hover the mouse cursor over the title bar and drag the Control to another space in the Dashboard.

1ERCE	Dashboard Home		Welcome, admin
			🕡 Get Help For This Pag
News & Annot	uncements 👻 X	Performance	× ×
Help	* X	Sales Graph	
Help will appear Find answers to Examples: Cam a. How do i Cri b. How do i Cri c. Where is the	in a separate window. questions about Commerce Manager containing the terms palgns and Promotions ate a Discount Promotion? eate a New Product? release history?	15000	Monthly Sales (this year)
	Summary	5000	
	Products: 1320 Categories: 64 Orders: 17 S C Promotions: 1	ustomers: 10 0-	May USD - Net Sales USD - Gross Sales

To collapse Controls, click on the **Up-arrow** icon. To expand a collapsed Control, click on the **Down-arrow**.



To remove a Control, click on the X icon.

Customer Management

Introduction

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

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

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

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

Working With Customer Management

Planning Organization Hierarchy

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

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

Creating Organizations and Contacts

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

Using Roles and Permissions

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

Organizations

Introduction

Under **Organizations**, Commerce Manager users can create new organizations. Organizations can be categorized into different types such as **organization** or **organization units** (for example regional branches, departments) and also business categories such as "Computer and Electronics" or "Clothing and Accessories".

Organizations can be structured into a tree structure with subunits with different levels of permissions assigned to each. For example, you can set up your company as a parent level organization while your departments such as Sales & Marketing, IT/Development, and operations as organization units. With this scenario, you can allow users in each departments to have access to only relevant systems, screens and functionality within Commerce Manager.

Working With Organizations

The work with organizations includes the following tasks:

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

Browsing and Viewing Organizations

Browsing Organizations

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

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



This will open the Organization List page.

		View:	Primary contact	• 🗹 🗙			
1 I	🖲 New Organization 🗇 Printer Version 🗙 Delete						
	Name	Description	Туре	Business Category	Primary Contact		
	Knudsen inc	temp	Organization	Automotive	Mr Mike Smith		
	Company X West	Company X West	Organization Unit	Food & Dining	Mr Mike Smith		
	Big Bank	A large bank with lots of VIP customers	Organization	Legal & Financial	Mr Mike Smith		
	Company X	Company X	Organization	Food & Dining	Jane Seymour		
	The Wine Cellar	The Wine Cellar	Organization	Industry & Agriculture	Mary Edwards		

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

Field	Description
Name	Name of the organization

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

Viewing Organization Details

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

Name:	Company X West		Parent:	Company X	
Information Information	Info	ormation Organization —			
Contacts Organizations	Na	ame:	Company X West	Туре:	Organization Unit
Addresses Credit Cards	De	escription:	Company X West	Business Cate	egory:Food & Dining
	Pr Ar Lii Ar	imary Contact: mount: mit Debt mount:	Mr Mike Smith		

Searching for Organizations

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

Customizing Views for Browsing Organizations

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

Do the following to create a new organization view:

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

ER	C	Orç	ganization List				
	New C	Organization 🛛 🚑 P	rinter Version X Delete	View: Type	All organia [System Vie All organia [New View	exations ews] exations	•
		Company X East Company X West Company X	Online software application Online software applications Online software applications	Organ Organ Organ	ization ization ization	Computers & Electronics Computers & Electronics Computers & Electronics	W

2. The New View dialog is displayed.

New View				×
General Fields Filters				
Enter Title	for all users		Everything is ready to create a new view for entities list. Please, type view name.	
	Save	Close		

3. The default tab is **General**. Enter a **Title** for the custom view. Click the check-box **Show this view for all users**, if you want other users to see this custom view.

New View					×
General	Fields Filt	ers			
	Professional S	ervices Companies	V	Everything is ready to create a new view for entities list. Please, type view name.	
		Save	Close		

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

New View		×
General Fields Filters		
Available columns: Description Id Modified Modifier Name Parent Parent (ref) Primary Contact Primary Contact (ref) Type	Visible columns:	1
	Save	

To **deselect** a column, click and highlight a column name from the **Visible columns** list and then click on the **Left Arrow** icon. To change the **ordering** of the **Visible columns** list, click and highlight a column name and click on the **Up and Down Arrow** icons on the right of the list to reposition the column.

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

lew View		6
General	Fields Filters	
And		
🕑 Bu	isiness Category Equals Arts & Entertainment	
- 🕓 Or	r	
🕑	Please choose	
(7)	Please choose	
	And	
	Or	
	Business Category	
	Created	
	Description	
	Id	
	Modified	
	Name	
	Parent 15	
	Parent (Reference)	
	Primary Contact	
	Primary Contact (Reference)	
	Туре	
	Save Close	
	Sare	

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

Applying a View

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

View:	Professional Services Companies	∎⁄ X
	[System Views]	
	All organizations	
Na	[User views]	
	Professional Services Companies	
	[New View]	

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

Editing and Deleting Views

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

ERC	E o	rganization L	ist				
			<i></i>	View: Profession	al Services Co	mpanies	×
🊈 New	Organization 🚑	Printer Version	K Delete				Edit
	Creator	Busine	ss Category	Name			

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

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

Customized View Example

In this example we will create a view that only shows organizations matching a business category and organization name. We will create a filter condition that display organizations with a **Business Category** that equals "Business & Professional Services" and an **Organization Name** that equals "Company X."

ERCE Organization List					
	lew O	rganization 🛛 🚑 Pr	inter Version X Delete	View: All organization	15 💌
		Name	Description	Түре	Business Category
		Company X East	Online software application	Organization Unit	Computers & Electronics
		Company X West	Online software applications	Organization Unit	Computers & Electronics
		Company X IT W	Online software application IT s	Divisional Unit	Computers & Electronics
		Company X	Online software applications	Organization	Computers & Electronics

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

- Since we want to add another filter so that the Organization not only matches this "Business Category," but also a specified name, click on the following + icon and then on the drop-down select "Name."
- 3. In the next field, select "Equals" and then on the field that says "Text" enter in the name of the Organization.
- 4. Once done, click Save to save the View.

New View			×
General	Fields	Filters	
And			
🕜 Bu	siness Category	/ Equals	Business & Professional Services
🕜 Na	me Equals	Company)	<u>(</u>
😮		C	

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

1E	R	CE	Organizat	ion List		
Г						
	= Ne	ew O	rganization 🛛 🔿 Printer Vers	ion 🛛 🗙 Delete 🗍	View: Professional Service	es Companies 💽 🖬 🗙
			Business Category	Name	Description	Туре
		-/	Computers & Electronics	Company X	Online software applications	Organization

Printing a List of Organizations

If you want to generate a printer-friendly list of Organizations, click on **Printer Version**. A new window will pop-up and render a simple table suitable for printing. Click on the **Print** button on the upper right corner of the page.

Creating Organizations

Introduction

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

Creating an Organization or Organization Unit

These steps apply to both organizations and organization units.

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

IERCE	Organization	List	
		\sim	View: All organizations
1 New Organization	n 🛛 🎒 Printer Version	X Delete	
Name S	Description	Туре	Business Category

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

MMERCE		New	
out 🕇			
Name:		Company X West	
Description	1:	Western subsidiary	*
Type:		Organization Unit 🔹	
Business Ca	ategory:	Food & Dining 🗸	
Parent:		Company X Parent Organization	•
Primary Contact:	Not Set Customer:0	Drganization_mf_PrimaryContactId_Desc	▼ cription}
Available B	alance: 0.0	0	
Overdraft L	imit: 0.0	0	
ОК	Cancel		

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

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

4. Save the organization by clicking OK. The Organization Info window of the organization appears. From here, you can view Information about the Organization you just created. Out of the box, you can also see associated Contracts, Organizations, Addresses, and Credit Cards. You can further edit the Organization by clicking the Edit button. To go back to the Organization List, click on Organizations on the menu bar next to Edit.

Name:	Company X		Parent:			
Information Information		Information				
Contacts Organizations		Name:	Company X	Type:	Organization	
Addresses		Description:	Company X	Business Cat	egory:Food & Dining	
Credit Cards		Primary Contact:	Jane Seymour			
		Amount:				
		Limit Debt Amount:				

Creating an Organizational Hierarchy

You can create organization hierarchies by assigning a **"parent organization"** to a **"child organization"** and then another organization to the child. Permissions can be set to determine which users can view certain organizations in the hierarchy. In this example, "Company X" is the Parent Organization and "Company X West" is the Organization Unit.

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

RCE Or	rganization Edit
Overview	
Name:	Company X West
Description:	Online software applications
Туре:	Organization Unit 💽
Business Category:	Computers & Electronics 💽 💌
Parent:	Company X 👻
	Not Set
OK Cancel	Company X
	More

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

🖬 Edit 🔁 Organ	nizations				
Name:	Company X We	st	Parent:	Company X	
Information		Information			
Information		- Organization -			
Contacts Organizations		Name:	Company X West	Туре:	Organization Unit
Addresses		Description:	Company X West	Business Catego	ory:Food & Dining
Credit Cards		Primary Contact:	Mr Mike Smith		
		Amount:			
		Limit Debt Amount:			
Edit Car	ncel				

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

Managing Company Accounts

Introduction

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

Adding a Company Account

Do the following to add a company account:

1. In Commerce Manager, go to Customer Management and Organizations. Select New Organization, and add the company information. 2. Under **Primary Contact**, select the user that will be the **administrator** of the company account. The administrator must be registered on the website with an account.

EPiserver <mark>Co</mark> l	MMERC	E	Edit	
Welcome 🔻 Change Language 🛛 Abo	out 🔻			
Customer Management 🛛 🍣				
🗄 🅵 Customer Management	Name:		Company XYZ	
Organizations	Descript	ion-		
Contacts	Descript	1011.	A company in the wine business	
 Gift Cards 	Туре:		[No value]	
	Business	Category:	[No value]	
	Parent:		💿 Not Set 💌	
			Parent Organization	
Dashboard	Primary	Mary Smith	v	
Customer Management	contact.	🛞 Not Set		ion}
Catalog Management	Available	Mary Smith		
	Overdra	Carlos Santana	~0	
Order Management		John Browne		
Marketing	ОК	More Cancel		

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

Name:	Company XYZ	Parent:	
Information Information Contacts Organizations Addresses Credit Cards		Contacts Age Full Name Mary Smith Carlos Santana	
		Page Size: 20 💌	(2 items) Page ∢ 1 ▶

Administering Company Accounts

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

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

Company Profile		
Members admin Member Since: 01 Mar 2012 Quma quma Member Since: 01 Mar 2012	2	EPiServer Business Category: Computers & Electronics Members: 2
Manage Members O	Orders	
Members Latest Comments	No Orders Yet	

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

Delivering to Multiple Addresses

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

Product	Quantity	Address		Shipping Method	
Pulenta, La Flor, Sauvigr 💌	2	1	-	Express delivery (1 day;	
Pulenta Estate, Pinot Gris	1	123	-	First class delivery (1-2	•

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

Split Shipment - Part 1						
Name Pulenta, La Flor, Sauvignon Blanc, Mendoza (Stelvin)			Quantity	Price	Total Discount	Total
			2	£9.45	£0.00	£18.90
Shipping Address 11 1 United States	Shipping Method(s) 1 package via: Express delivery (1 day)		Subtotal Shipping & Hai Taxes	ndling	61 62	8.90 (exc. Tax) 0.00 (exc. Tax) 0.00
Split Shipment - Part 2						
Name			Quantity	Price	Total Discount	Total
Pulenta Estate, Pinot Gris Mendo	oza		1	£9.35	£0.00	£9.35
Chipping Address	Chinging Mathed(a)		Subtotal	Subtotal	6	9.35 (exc. Tax)
Shipping Address	Shipping Method(S)		Shipping & Ha	ndling		
123 123	First class delivery (1-2		-		61	0.00 (exc. Tax)
123 United States	days)		Taxes		60	0.00
			Order Discount		-6	0.00 (exc. Tax)
			Total Order	,	£5	8.25 (exc. Tax)

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

Editing and Deleting Organizations

Editing Organizations

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

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

	View	Primary contact	- 🖉 🗙					
🛅 New Organization 🎒 Prin	📧 New Organization 🔿 Printer Version 🗙 Delete							
Name	Description	Түре	Business Category	Primary Contact				
Knudsen inc	temp	Organization	Automotive	Mr Mike Smith				
Company X West	Company X West	Organization Unit	Food & Dining	Mr Mike Smith				
Big Bank	A large bank with lots of VIP customers	Organization	Legal & Financial	Mr Mike Smith				
Company X	Company X	Organization	Food & Dining	Jane Seymour				
The Wine Cellar	The Wine Cellar	Organization	Industry & Agriculture	Mary Edwards				

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

Name:	Company X West		Parent:	Company X	
Information	1	nformation			
Information		Organization —			
Contacts Organizations		Name:	Company X West	Type:	Organization Unit
Addresses		Description:	Company X West	Business Cat	egory:Food & Dining
Credit Cards		Primary Contact:	Mr Mike Smith		
		Amount:			
		Limit Debt Amount:			

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

MMERCE	Edit
.*	
Name:	Company X Fast
Description:	Company X East
Type:	Organization Unit 🔻 📴
Business Category.	Food & Dining 🔻 📴
Parent:	Company X Y Parent Organization
Primary 💿 Not Set	- •
Contact: {Customer.	Organization_mf_PrimaryContactId_Description}
Available Balance: 0.0	00
Overdraft Limit: 0.0	00
OK Cancel	

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

Deleting Organizations

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

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

🚈 New Organization 🎒 Printer Version 🗙 Delete						
Name Name	Description	Type				
Knudsen inc	temp	Organization				
Company X West	Company X West	Organization Unit				
Big Bank	A large bank with lots of VIP customers	Organization				
Company X East	Company X East	Organization Unit				
Company X	Company X	Organization				
The Wine Cellar	The Wine Cellar	Organization				

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



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

Defining Organization Types and Business Categories

Introduction

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

Creating, Editing and Deleting Organization Types

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

MERCE		Edit	
Name:		Company X	
Description	n:	Company X	*
Type:		Organization	-
Business C	ategory:	Food & Dining	✓ Edit Dictionary
Parent:		Not Set	~
Primary Contact:	Not Set {Customer:	Organization_mf_PrimaryContac	v t/d_Description}
Available Balance: 0.00 Overdraft Limit: 0.00		00	
		00	
ОК	Cancel		

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

Manage List					
s	system Name: OrganizationType	Friendly Name: OrganizationType	Type: Single Value		
Nº	Item Value	Display Value			
1	Organization	Organization	🗹 🗙		
2	Organization Unit	Organization Unit	1 ×		

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

Manage List 🚈 New Item 🛛 🔀 Close					
s	system Name: OrganizationType	Friendly Name: OrganizationType	Type: Single Value		
Nº	Item Value	Display Value			
1	Organization	Organization	1		
2	Organization Unit	Organization Unit	1 ×		
3	▼ Division	4	₽ €		
2					
3	N				

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

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

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

Creating, Editing and Deleting Business Categories

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

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

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

Contacts

Introduction

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

Contacts are individuals with a certain set of personalized information (name, address, email, etc.).

- **Contacts with Accounts** a customer who registers on the public site. If this customer chooses, he/she can login to his/her Account from the public site and access his/her order history and other personalized information. He/she cannot access the Commerce Manager.
- Contacts with User Permissions someone internal to your team who has varying levels of access to the systems within Commerce Manager.

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

Working With Contacts

The work with contacts and accounts includes the following tasks:

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

Browsing and Viewing Contacts

Browsing Contacts

To browse Contacts, go to Customer Management > Contacts.



Viewing Detailed Contact Information

The Contact List page shows a list of existing Contacts.

	1EI	٩C	E List			
1						
				Diew: A	II contacts	•
	83 N	lew C	ontact 🎒 Printer Version 🗙 Dele	ete Selected		
			FullName2	FirstName2	Last Name	Middle Name
			Receiving Manager	Receiving	Manager	
			Order Manager	Order	Manager	
			Jennifer Browne	Jennifer	Browne	
			Mary Smith	Mary	Smith	
			Shipping Manager	Shipping	Manager	
			<u>admin</u>	admin		
		1	Order Supervisor	Order	Supervisor	
		=/	Carlos Nevada	Carlos	Nevada	
		-/	Lisa Prescott	Lisa	Prescott	

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

CE View				Welcome, admin Product Version: 5.2 (build: 361) License: ECF G5 Deployment (EpiServ
ut 🎽				🕝 Get Help For This Page
Edit K Delete Contact	Contacts	New Order		
Full Name: admin		Parent Organ	ization:	
Information	Information			
Information	Contact			
Addresses Credit Cards	Full Name:	admin	Customer Group:	
Security	First Name:	admin	Preferred Currency:	
Roles	Middle Name:		Preferred Language:	
Order History	Last Name:		Registration Source:	
Shopping Lists Wish Lists Shopping Carts	Parent Organizati Preferred Shippin Address: Preferred Billing Address:	on: g	Last Order Date:	
	- Account			ge Password Remove Account –
	User Name:	admin	Is Locked Out:	none
	Description:		Last Activity:	Today, 2:49 PM
	Email:	admin@yourcompany.com	Last Login:	Today, 2:48 PM
			Last Password Changed:	7/7/2011 9:34:48 AM
Edit Cancel				

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


More objects or metadata can be added to the default View Form via Business Foundation.

Searching for Contacts

On the **Contact Info** page, you can use the search form above to search for a particular Contact using key terms. Conduct the search by clicking on the **Search** icon (magnifying glass). Contacts that match the search terms will appear on the list.

visitor					
Sel New Contact Brinter Version X Delete Selected					
		Full Name	First Name		
		EPiServer Commerce Visitor	Visitor		

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

Customizing Views for Browsing Contacts

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

Creating a New View

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

1ERCE	Contact List		
Se New Co	ontact 🔿 Printer Version 🗙 Dele	View:	All contacts [System Views] All contacts
	Full Name	First Name	[New View]
	Mats Hellström	Mats	Hellström
	admin	admin	

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

New View		×
General Fields Filters		
Enter Title Show this view for all users	 Everything is ready to create a new view for entities list. Please, type view name.	

The default tab is **General**. Enter in a **Title** for the custom **View**. Check the box **Show this view for all users** if you want other users to see this custom View.

New View					
General	Fields Filters				
	Center Title Only in Company X Show this view for all users		Everything is ready to create a new view for entities list. Please, type view name.		

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

General Field Availa Code Created	s Filters ble columns:		Visible columns:	
Availa Code Created	ble columns:		Visible columns:	
Code Created				
Creator Customer Group Date Of Birth			First Name Full Name Email	1
ld Last Name Last Order Date Middle Name Modified		→		1
iddle Name odified		~		

To deselect a column, click and highlight a column name from the **Visible columns** list and then click on the **Left Arrow** icon.

To change the ordering of the **Visible column** list, click and highlight a column name and click on the **Up** and **Down Arrows** on the right of the list to reposition the column.

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

New View		×
General Field	ds Filters	
General Field And And Please choo Please choo And Or Code Created Customer O Date Of Birt Email First Name Id Last Name Id Last Name Id Last Order Middle Nam Modified Parent Org; Parent Org; Preferred B Preferred B Preferred C	ds Filters	
Preferred S Preferred S Registratio	ihipping Address Shipping Address (Reference) In Source	

There are a multitude of options available for customization.

Applying and Editing a View

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

IERCI	Contact L	ist		
	ontact A Printer Version Email mats@episerver.com mary.smtih@comopanyx peter.sunna@episerver.com	Delete Selected Full Name Mats Hellström Mary Smith Peter Sunna	View: Only in Company X [System Views] All contacts Fir: [User views] Only in Company X Ma[New View] Mary Peter	

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

To edit an existing View or a View you just created, select the **View** from the drop-down menu and click on the **Edit** icon next to it. The **View Editing** form pops up and you are able to edit all properties.

View: Only in Company X	• <u>*</u> ×
	Edit
First Name	

Printing a List of Contacts

To generate a printer friendly layout of the **Contact List**, click on **Printer** Version from the menu bar on the **Contact List** page.

MERC	E List			
•				
		\sim	View: All o	contacts
Sew Co	ontact 🗐 Printer Version 🗙 Dele	te Selected		
	FullName2	FirstName2		Last Name
	Receiving Manager	Receiving		Manager
	Order Manager	Order		Manager
	Jennifer Browne	Jennifer		Browne
	Mary Smith	Mary		Smith
	Shipping Manager	Shipping		Manager
	<u>admin</u>	admin		
	Order Supervisor	Order		Supervisor
	Carlos Nevada	Carlos		Nevada
	Lisa Prescott	Lisa		Prescott

A new browser window opens showing a printer-friendly version of the Contact List. Click on **Print** on the far right corner of the browser window.

Contact

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

Creating Contacts and Accounts

Creating Contacts

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

IERCE	Contact List	
Sew Contact	🗿 Printer Version 🛛 🗙 Delete S	elected
Full Full	me Fi	rst Name
- ·		

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

- 1. Select a **Parent Organization** from the drop-down menu to associate the contact with a single parent organization.
- Assign the contact to a Customer Group. More Customer Groups can be added by editing the *Customer Group Dictionaries*. Customer Groups become useful when setting specific permissions and targeted *Marketing Campaigns*. (For more information, see "How to Assign a Customer Group Sales Price for a Particular Item" section below.)
- Select a Preferred Currency for the contact. If the contact is in France, you may want to associate the Euro currency. Available currency options are based on settings in Administration > System Settings > Dictionaries > Currencies.
- 4. Select a **Preferred Language** to associate with the contact. Languages are populated based on the languages set under **Administration > System Settings > Dictionaries > Languages**.
- 5. **Preferred Shipping** and **Billing addresses** are related to company accounts, refer to *Manage Company Accounts* for more information.
- 6. The **Registration Source** field is a text field for entering in notes about the contact. For instance, you may want to reference which website the contact is currently registered under.

The **Registration Source** field is automatically filled when a user creates a new account from the public website.

ERCE New	,
Overview	
Full Name:	Mary Smith
First Name:	Mary
Middle Name:	
Last Name:	Smith
Email:	mary.smith@companyx.com
	Contact Email Description
Parent Organization:	Company X 💌
	Contact Organization
Customer Group:	Customer 🗸 💽
Preferred Currency:	US dollar 🔻
Preferred Language:	English (United States) 🗸
Preferred Shipping Address:	[No value]
Preferred Billing Address:	[No value]
Registration Source:	
OK Cancel	

Click **OK** to save the contact. The **Contact Info View Form**, where you can enter in additional information about the contact as well as go back and edit the contact again.



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

ERCE	Contact I	nfo				Welc	ome, admin	
						_	3 Get Help For This Pag	ge 🌲
🛃 Edit 🗙 Delete	Contacts							
Full Name:	Mary Smith			Parent Organization:	Company X			
Information		Information						
Information		- Contact						
Addresses		Full Name:	Mary Smith	Custom	er Group:	Customer		
Orders		First Name:	Mary	Preferre	d Currency:	USD		
Order History		Middle Name:		Preferre	d Language:	en-US		
Shopping Lists		Last Name:	Smith	Registra	tion Source:	companyx		
Shoppin		Parent Organization:	Company X	Last Ord	ler Date:			
		~ Account					Create accour	nt –
		Account not found:						
	-							

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

Creating Accounts

An **Account** can be created with a contact. Once an account has been created, the contact can be assigned permissions using Roles and access the Commerce Manager.



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

To create an account for an existing contact, click on a contact name from the **Contact List**. On the **Contact Info** page, click on **Create Account**.

ERCE	Contact I	nfo			Welcome, admin
					🕜 Get Help For This Page 🌩
🛃 Edit 🗙 Delete	Contacts				
Full Name:	Mary Smith			Parent Organization: Company	x
Information		Information			
Information		- Contact			
Addresses		Full Name:	Mary Smith	Customer Group:	Customer
Credit Cards		First Name:	Mary	Preferred Currency:	USD
Order History		Middle Name:		Preferred Language:	en-US
Shopping Lists		Last Name:	Smith	Registration Source:	companyx
Wish Lists Shopping Carts		Parent Organization:	Company X	Last Order Date:	
		Account Account not found:			Create account

Edit Cancel

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

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

inactive and inaccessible by the user.

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

Create account		
User Name:	Mary	
Password:	•••••	
Description:	mary.smith@companyx.com	
Email:	mary.smtih@companyx.com	
Approved:		
	GK Cancel	

User account information appears under the **Account** section of the **Contact Information** form. **Fields Explained:**

- Last Activity last time the user logged in or made any changes to the site.
- Last Lockout last time a user was locked out due to too many failed login attempts.
- · Last Login last time the user logged into his or her account.
- Last Password Changed last time the user account password changed.

ERCE	Contact I	nfo			Welcome, admin
					🕜 Get Help For This Page
🛃 Edit 🗙 Delete	Contacts				
Full Name:	Mary Smith		Parent	Organization: Company X	
Information		Information - Contact			
Addresses Credit Cards Security		Full Name: First Name:	Mary Smith Mary	Customer Group: Preferred Currency:	Customer USD
Orders Order History Shopping Lists		Middle Name: Last Name: Parent Organization:	Smith Company X	Preferred Language: Registration Source: Last Order Date:	en-US companyx
Wish Lists Shopping Carts		Account User Name: I Description:	Mary mary.smith@companyx.com	Edit Accou Last Activity:	nt Change Password Remove Account 6/1/2010 9:17:44 AM none
		Email:	mary.smtih@companyx.com	Last Login: Last Password Changed:	6/1/2010 9:17:44 AM 6/1/2010 9:17:44 AM
Edit Canc	el				

Editing and Deleting Contacts and Accounts

Editing Contacts and Accounts

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

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



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

Deleting Contacts and Accounts

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

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

Defining Customer Groups

Introduction

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

Creating, Editing and Deleting Customer Groups

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

CE Edit		
Overview		
Full Name:	Mary Smith	
First Name:	Mary	
Middle Name:		
Last Name:	Smith	
Email:	mary.smith@companyx.com	
Parent Organization:	Contact Email Description Company X Contact Organization	~
Customer Group:	Customer	- N
Preferred Currency:	US dollar	Edit Dictionary
Preferred Language:	English (United States)	•
Preferred Shipping Address:	[No value]	•
Preferred Billing Address:	[No value]	•
Registration Source:		
OK Cancel		

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

Ma	Manage List			
	System Name: ContactGroup	Friendly Name: ContactGroup	Type: Single Value	
N₽	Item Value	Display Value		
1	Customer	Customer	🥑 🗙	
2	Partner	Partner	<i>∎</i> / ×	
3	Distributor	Distributor	⊿ ×	

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

Mana	Manage List 🚈 New Item 🔀 Close			
System Name: ContactGroup		Friendly Name: ContactGroup	Type: Single Value	
N₽	Item Value	Display Value		
1	Customer	Customer	🛃 🗙	
2	Partner	Partner	# ×	
3	Distributor	Distributor	Z ×	
4	▼ Subvendor	#	.	
1				
3				
4				

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

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

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

Roles

Introduction

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

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

Users can also create their own roles based on a set of permissions. Roles allow administrators to restrict users from accessing different systems or folders depending on their needs. There is a wealth of

permissions options administrators can set for a role, and each role area has specific areas that may not be applicable to other areas. Generally, permissions such as **View** and **Edit** are commonplace.

Exploring Roles and Permissions

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

EPISERVER COMM	IERCE Role List
Welcome * Change Language About *	
Customer Management 🏻 🍣	🗋 New 🏂 More Actions 🕇
🗄 🕵 Customer Management	Role Name
Organizations	Admins
Contacts	🔲 📷 🗙 Order Managers
Gift Cards	🔲 🛃 🗙 Order Supervisor
	🔲 🛃 🗙 Shipping Manager
	🔲 🛃 🗙 Receiving Manager
	🔲 🛃 🗙 Everyone
	🔲 🛃 🗙 Registered
	🔲 🛃 🗙 Management Users
	🔲 🛃 🗙 Administrators
	🔲 🛃 🗙 WebAdmins
	🔲 🛃 🗙 WebEditors
	🔲 📝 🗙 Expert

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

Overview		
Role Name:	Order Managers	
Permissions:	🗉 🎦 🥅 Administration	*
	🖃 🎦 Order	
	🖃 🎦 🥅 Manage	
	🖃 🍃 🥅 Returns	
	🔍 🔽 Create	
	🔍 📝 Create Exchange	
	🔍 🔲 Receiving	
	🗉 🛅 🔲 Shipment	
	🔍 🔽 View	=
	🔍 📃 Create	
	K V Edit	
	S Delete	
	Send Notifications	
	Self Shimont	
	Credit Payment	
	🔍 🦳 Change Line Item Price	
	🗉 🛅 🥅 Administration	
	🖃 🎦 Customer	
	🗉 🎦 🥅 Roles	-
ОК	Cancel	



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

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



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

Working With Roles

The work with roles and permissions includes the following tasks:

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

Creating, Editing, and Deleting Roles

Introduction

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

Creating a Role

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

EPISERVER COM	MERCE Role List
Welcome 🔨 Change Language About 💙	
Customer Management 😂	New 🖻 More Actions 🔻
🗄 💁 Customer Management	Role Name
Organizations	Admins
Contacts	📄 📷 🗙 Order Managers
🔊 Roles	Crder Supervisor
Gircards	
	Receiving Manager

Click on New to open up the Role Edit page.

ERCE	Role Edit	
Overview		
Role Name:		
Permissions:	🖃 🎦 Asset	*
	🕀 🎦 🥅 Manage	
	🗉 🎦 Administration	
	🖃 🎦 Catalog	
	🗉 🎦 🥅 Catalogs	
	🗉 🎦 🥅 Administration	
	🖃 🎦 Content	E
	🗄 🎦 🥅 Sites	
	🕀 🎦 Administration	
	🖃 🎦 Core	
	😠 🎦 🥅 Management	
	🖬 🛅 🥅 Administration	
	Customer	
	Marketing	
	Campaigns	
	Image: A constructions	

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

Enter a Role Name.

Checkmark the boxes to give Permissions to the Account for this particular function or action. For example, if you want an Account to only **View** and **Edit Assets**, you will need to expand **Assets > Manage** and checkmark **View and Edit**.

IERCE	Role Edit
<u> </u>	
Overview	
Role Name:	Asset View/Edit
Permissions:	🖃 🍗 Asset
	🖃 🎦 🥅 Manage
	🔍 🔽 View
	🔍 🥅 Create
	🔍 🔽 Edit
	الم

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

	$\blacksquare \times$	Customer Managers		
	$\blacksquare \times$	Everyone		
	$\blacksquare \times$	Registered		
	$\blacksquare \times$	Asset View/Edit		
Page Size: 100 💌				

Editing Existing Roles

All existing Roles, including the ones included out of the box with Commerce Manager, can edited and customized. It is also a recommended reference to how each pre-existing Role works.

To edit a Role, click on the Edit icon.

🛃 🗡	Catalog Managers
\mathbb{R}^{\times}	Catalog Schema Managers
$\mathbb{P} \times$	Order Admins
${\scriptstyle \blacksquare} \times$	Order Managers
$\blacksquare \times$	Marketing Viewers
$\swarrow \times$	Customer Viewers

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

Deleting Roles

To delete any Role on the list, there are two ways:

Click on the X button next to the name of the Role to delete one at a time.

	📝 🗙 Cms Viewers
	📝 Xin Cms Editors
	Delete gement Users
	Marketing Admins
_	A 4 4

To delete multiple Roles, checkmark each box and on the menu bar, click on **More Actions > Delete Selected**. Click **OK** when the pop-up appears.

1ERCI	Role List
New	💆 More Actions 🔻
	X Delete Selected
	X Asset Admins
	X Asset Managers
	X Catalog Viewers
Image: A state of the state	X Cms Admins
🔽 🖃	X Cms Managers
🔽 🖃	X Cms Viewers
🔽 🛃	X Cms Editors
	X Management Users

Assigning Roles to Individual Accounts

Introduction

Roles are designed to allow and disallow certain functionality and folders to individual accounts. When a contact logs into his or her account, that account is bound by the roles it was assigned.

Assigning a Role

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

ERCE	Contact I	nfo				Welcome, admin
						🕜 Get Help For This Page 🍦
🛃 Edit 🗙 Delete	Contacts					
Full Name:	Mary Smith		Р	Parent Organiz	ation: Company X	
Information		Information				
Information		- Contact				
Addresses		Full Name:	Mary Smith		Customer Group:	Customer
Security		First Name:	Mary		Preferred Currency:	USD
Roles		Middle Name:			Preferred Language:	en-US
Orde		Last Name:	Smith		Registration Source:	companyx
Shopping Lists		Parent Organization:	Company X		Last Order Date:	
Wish Lists Shopping Carts		- Account			Edit Accou	nt Change Password Remove Account
		User Name:	Mary		Last Activity:	6/1/2010 9:17:44 AM
		Description:	mary.smith@companyx.com		Last Lockout:	none
		Email:	mary.smtih@companyx.com		Last Login:	6/1/2010 9:17:44 AM
					Last Password Changed:	6/1/2010 9:17:44 AM
	-1	1				

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

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

ERCE	Contact I	nfo			Welcome, admin
					🕡 Get Help For This Page 🌲
📝 Edit 🛛 🗙 Delete	Contacts				
Full Name:	Mary Smith		Parent	Organization: Company X	
Information Information Addresses Credit Cards Security Roles		Roles	Organization none none	Inheritance [Undefined] [Undefined]	
Orders Order History Shopping Lists Wish Lists Shopping Carts	k	Page Size: 20 💌			(2 items) Page 4 1 >
Edit Canc	el				

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

Assign Role	×	
Security Role:	Cms Admins	
Organization:	Company X 🗸	
Inheritance:	Inherit From Parent	
	Save Cancel	

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

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

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

ERCE	Contact I	Info			Welcome, admin
					🕜 Get Help For This Page 🌲
🛃 Edit 🗙 Delete	Contacts				
Full Name:	Mary Smith		Parent	Organization: Company X	
Information Information		Roles	Roles		
Credit Cards		Role Name	Organization	Inheritance	
Security Roles		Registered	none none Company X	[Undefined] [Undefined] Overwrite parent	
Order History Shopping Lists		Page Size: 20 💌			(3 items) Page « 1 »
Wish Lists Shopping Carts					
Edit Can	cel				

Gift Card Administration

Introduction

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

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

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

EPISERVER COMMERCE List						
Welcome [*] Change Language About [*]						
Customer Management						
🗄 🕵 Customer Management	New Printer Version X Delete					
Organizations	Gift Card Number					
Contacts						
🗦 Roles	<u>123-456</u>					
Gift Cards	Card123					

Creating a Gift Card

Do the following to create a new gift card:

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

Get Help For This Pag ⁷ −654
7-654
'-6 54
7-654
345678
card security code information
0/2012 4:11PM

Editing a Gift Card

Do the following to edit an existing gift card:

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

Deleting a Gift Card

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

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

Catalog Management

Introduction

The **Catalog Management** system provides full complement of tools and capabilities to create and manage a diverse range of products, variations, pricing strategies, languages, and related website functions. To manage products, you can go to the back-end Commerce Manager and you will notice that products are arranged into one or more catalog(s). Catalogs are independent from one another and you may create as many catalogs as you need. Catalogs can be structured in a number of ways. For example, you may have various brands or product lines. Each brand or product line can have its own catalog. Or, a retailer may have multiple suppliers, in which case, you can segment each supplier into its own catalog. A default B2C Sample Site along with a default electronics catalog (consisting of a Brands catalog + an Everything catalog) is included giving you a running demo site after you run the installer.

EPiServer Commerce allows you to easily and flexibly organize and categorize your products. All products referenced on a front-end site reside in a catalog created in Commerce Manager. Multiple catalogs can be created and assigned to one or more sites. The dates that each catalog will be available to the customer can also be defined. In this way, future revisions to items and pricing can be prepared easily and reviewed in advance of the release date to the site.

Organizing Catalogs and Catalog Entries

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

- Categories a grouping of purchasable products.
- *Products* represents various forms of merchandise that you can display and purchase from the front-end site. Products can be organized into the following:
- Variations/SKUs

A **variation** or **SKU** (Store Keeping Unit) corresponds to a specific type of product with specific characteristics. For example, a product of Shirts will have an individual variation/SKU which includes size, color and sleeve length.

• Bundles

a **bundle** is a collection of Variations and SKUs allowing customers to purchase two or more items at once. All pricing is SKU specific and separate, unlike for a package which is multiple SKUs put together in a single unified price.

Refer to "Mixed Cases" on the EPiServer Commerce sample site, for an example of a product bundle.

• Packages

A **package** is comparable to an individual SKU because the package item must be purchased as a whole (for instance computer system). Multiple SKUs make up the package, but it has its own single unique pricing and SKU.

• Dynamic Packages

A **dynamic package** is similar to the package definition above with the added ability to configure the package during checkout.

Associations

One or more products can be **associated** to a product so that they can be displayed advertised on the public site as product accessories, or outselling/cross-selling item. Associations can be made from any of the individual products.

Meta Classes and Fields for Products

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

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

Working With Catalog Management

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

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

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

Importing and Exporting Catalogs

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

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

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

Importing and Exporting Existing Catalogs

Introduction

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

Accessing Import/Export

- 1. Access the **Catalog List** page in the Catalog Management subsystem. The **Import/Export** menu is located in the upper left corner of the main window.
- 2. For exporting catalogs, click on the check box for the appropriate catalog nodes.
- 3. Click on the **Import/Export** pull-down menu to choose either import or export. The corresponding page will appear in the main window.

MERCE	Catalog List
New Catalog	Mara Actions
	CSV Import Catalog
🔲 🛃 🖄 V	Import Catalog
	Export Catalog

Importing Catalogs

- 1. Click Add New File and browse and select the file to upload.
- 2. Click on the Upload file button. The files uploaded will appear in the list below.
- 3. Click on the **Start Import** button. The progress window will show that the import is taking place.
- 4. When the import is 100% complete, close the progress window.

Import								
It is strongly recomm	It is strongly recommended that you back up your ECF database before performing import.							
To import catalog, pleas	e pick up an existing file from the grid below or u	ipload a new one. T	hen click the button 'Start Im	port' to start importing.				
🛃 Add New File								
Files Available For I	mport:							
Actions	File Name	Size	Created	Last Updated				
Download Delete	CatalogExport_Catalog_Wine_Sample.zip	742.90 KB	Today, 2:35 PM	Today, 2:34 PM				
1				Page 1 of 1 (1 items)				
Start Import								
Starempore								

Exporting Catalogs

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

1. Export everything included in the catalog node that you've selected.

- To do this, click on the Start Export button. The progress window appears and shows the status of the export.
- When the export is 100% complete, click on Close to close the progress window

2. Export only the desired files.

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

1ERCE	Export Catalog		w	elcome, admin
				🕜 Get Help For This Page
Export				
You're about to export a	catalog. Click the button to start.			
Exported Files List:				
Actions	File Name	Size	Created	Last Updated
Download Delete	CatalogExport_Catalog_Wine_Sample.zip	742.90 KB	Today, 10:31 AM	Today, 10:31 AM
1				Page 1 of 1 (1 items)

Importing Catalogs Using CSV Files

Introduction

The CSV catalog import is a feature in the Catalog Management system that enables you to import and manage catalog entries (such as Products, Variations/SKUs, Packages) in bulk using an excel spread-sheet (.csv format). It is an alternative to manually creating catalog entries directly in Commerce Manager, which can be tedious when dealing with a large amount of catalog data.

This feature enables you to accomplish these key tasks:

- Import your .csv spreadsheets and create new catalog entries in Commerce Manager.
- Set your catalog items into a desired category structure of your choosing
- Create entry relations to associate one entry with others (e.g., variation/SKUs will appear within a product or a package)
- Edit or delete existing catalog items..

The CSV catalog import feature can be used for your entire catalog data, or just portions of them.

Import Overview

Here are the basic steps you can take to import and set up a new catalog using the CSV import feature. Before you start, choose an existing catalog folder or create a new one (in the Catalog Management system) to import the CSV files to.

- 1. Create CSV data files (using Excel Spreadsheet, Notepad, etc.) with information about your categories, entries, and entry relations.
- 2. Create necessary meta fields for the new catalog entries (in the Administration system).
- 3. Upload the CSV data files to the CSV Import page.
- 4. Create a mapping file for each CSV file. A mapping file is needed to link each column of data in a CSV file to the correct attributes in Commerce Manager.
- 5. Import the CSV files and their corresponding mapping files into a specific catalog.
- 6. Create entry relations to associate one entry with another (e.g., a Package and a Product, a Product and a Variation/SKU, etc.).

Format for CSV Files

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

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

Note: Please make sure to specify an appropriate command for each line of the CSV files. Entering "Insert" when that data already exist, or "Update" when no data exist will give an error during import and those line of data will not get successfully imported.

- Category Code (by comma): By assigning a category code to an entry, you can specify the category that you want to place your entry in. Also please note this rule:
- SEO URL: By design, this attribute that is present in both categories and entries must be unique for each item in your catalog. Importing files that contain more than one identical url will result in an error.

Mapping Types

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

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

By selecting these options, the Commerce Manager will display different sets of Fields and Attributes for you to manually assign to each data column of your CSV file. Figure 8 and 9 below shows the display of the mapping files with the Category w/ Meta and Entry Relations Data type respectively. The items under **Fields and Attributes** with superscripts 1 and/or 2 are headers that are required attributes that must exist in the CSV files you are importing (1- required field for Insert, 2 – required field for Update).

Example: Importing and Setting up a New Catalog

The example below demonstrates how to use CSV import using the guidelines provided above. Let's say you want to set up a "Baby Stuff" catalog with categories and entries as shown here in Figure 1.



Figure 1

Prerequisite: Create a new catalog

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

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

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

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

The sample files contain the following:

- BabyStuffCategories.csv
- BabyProducts.csv
- BabyPackages.csv
- BabyVariations.csv
- BabyVariationInventoryPricing.csv
- BabyEntryRelations.csv
- BabyAssociations.csv
- BabySalePrice.csv

CSV File Type 1 - Category File

This file specifies data for categories and/or subcategories within a Catalog.

The top line has column headers that will be matched with the Meta fields in the later steps. The headers can also have different names. As you will see in later steps, Category Code in column 1 is important since it specifies where the entry data will be stored. The code entered in under Parent Code in column 2 can be used to create subcategories. If the Parent Code is set to "null" or "root," then that category will be created in the root level of a catalog. In this example, the "Infants" and "Toddlers" category will be created at the root level, while the "Diapering Supplies" category will be located under "Infants" as a subcategory.

	А	В	С	D	E	F	G
1	Action	Category Code	Parent Code	Category Name	Available from	Expires on	Available (True/False
2	Insert	Cat1	null	Infants	1/1/2009	6/1/2009	TRUE
3	Insert	Cat2	null	Toddlers	1/1/2009	6/1/2009	TRUE
4	Insert	Cat10	Cat1	Diapering Supplies	1/1/2009	5/1/2009	TRUE
5							
6							

Figure 2

CSV File Type 2 – Entry Files

These files specifies data for Catalog Entries. The Products, Variation/SKUS, and Packages CSV files for this example are shown in Figure 3, 4, and 5 respectively.

	А	В	С	D	E	F	G	
1	Action	Product Code	Product Name	Entry Type	Category Code	Available from	Expires on	Availa
2	Insert	Prod1	Diapers	Product	Cat10	1/1/2009	6/1/2009	
3	Insert	Prod2	Wipes	Product	Cat10	1/1/2009	5/1/2009	
4	Insert	Prod3	Potty Training Pants	Product	Cat2	1/1/2009	6/1/2009	
5								

Figure 3

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

Figure 4

	А	В	С	D	E	F	G	
1	Action	Package Code	Package Name	Entry Type	Category Code	Available from	Expires on	Availa
2	Insert	Package NB	Newborn Package	Package	Cat10	1/1/2009	12/31/2010	
3	Insert	Package3to6	3 to 6 mo Package	Package	Cat10	1/1/2009	12/31/2010	
4								

Figure 5

CSV File Type 3 – Entry Relations File

This file is used to link one entry to others. In this example, Var1 ~ Var5 (different diaper sizes) are associated to Prod1 "Diapers," Var9 ~ Var11 (different quantity for wipes) are associated with Prod2 "Wipes" and so forth. Also some variations are assigned to packages. Please note that the Prod, Var and Package codes MUST BE the codes from the entry CSV files (Figure 3, 4, and 5). If you include codes that are not defined in the entry CSV files, you will get an error while importing them into Commerce Manager in Step 4.

	А	В	С	D
1	Action	Parent Entry Code	Child Entry Code	
2	Insert	Prod1	Var1	
3	Insert	Prod1	Var2	
4	Insert	Prod1	Var3	
5	Insert	Prod1	Var4	
6	Insert	Prod1	Var5	
7	Insert	Prod2	Var9	
8	Insert	Prod2	Var10	
9	Insert	Prod2	Var11	
10	Insert	Prod3	Var6	
11	Insert	Prod3	Var7	
12	Insert	Prod3	Var8	
13	Insert	Package NB	Var1	
14	Insert	Package NB	Var10	
15	Insert	Package3to6	Var2	
16	Insert	Package3to6	Var10	
17				

Figure 6

CSV file type 4 - Associations file

This file is used to create associations between different entries. In this example, Var 10 is associated to Var 1 as an Accessory, and Var 2 to Var 1 as a cross-sell item.

	А	В	С	D	E	
1	Action	Baby Catalog Association Name	Parent Entry Code	Child Entry Code	Sort Order	4
2	Insert	Accessories	Var1	Var10	1	¢
3	Insert	Customers Who Bought This Item Also Bought	Var1	Var2	2	¢
4						

Figure 7

CSV file type 5 - Pricing/Inventory file

This file is used to specify the information for the Pricing/Inventory tab of each individual entry.

	A	В	С	D	E	F	G	Н	l.	J
					Track Inventory					
1	Action	Entry Code	Price	Tax Category	(True/False)	Warehouse	Weight	Package	Min Quantity	Max Quar
2	Update	Var1	16.99	General Sales	TRUE	Default Warehouse	1	box	1	
3	Update	Var2	17.99	General Sales	TRUE	Default Warehouse	1	box	1	
4	Update	Var3	17.99	General Sales	TRUE	Default Warehouse	1	box	1	
5	Update	Var4	18.99	General Sales	TRUE	Default Warehouse	1	box	1	
6	Update	Var5	18.99	General Sales	TRUE	Default Warehouse	1	box	1	
7	Update	Var6	25.99	General Sales	TRUE	Default Warehouse	1	box	1	
8	Update	Var7	25.99	General Sales	TRUE	Default Warehouse	1	box	1	
9	Update	Var8	25.99	General Sales	TRUE	Default Warehouse	1	box	1	
10	Update	Var9	4.49	General Sales	TRUE	Default Warehouse	1	box	1	
11	Update	Var10	15.99	General Sales	TRUE	Default Warehouse	1	box	1	
12	Update	Var11	25.99	General Sales	TRUE	Default Warehouse	1	box	1	
13										

Figure 8

CSV file type 6 - Sale Price file

This file is used to specify the information for the Pricing section of the Pricing/Inventory page.

	А	В	С	D	E	F	G	Н	1
1	Action	Entry Code	Sale Type	Sale Code	Unit Price	Currency	Start Date	End Date	
2	Insert	Var1		BBV1	16.99	USD	1/1/2009 6:00	10/1/2009 18:00	
3	Insert	Var2		BBV2	17.99	USD	1/1/2009 6:00	10/1/2009 18:00	
4	Insert	Var3		BBV3	17.99	USD	1/1/2009 6:00	10/1/2009 18:00	
5	Insert	Var4		BBV4	18.99	USD	1/1/2009 6:00	10/1/2009 18:00	
6	Insert	Var5		BBV5	18.99	USD	1/1/2009 6:00	10/1/2009 18:00	
7	Insert	Var6		BBV6	25.99	USD	1/2/2009 11:00	6/3/2009 23:00	
8	Insert	Var7		BBV7	25.99	USD	1/2/2009 11:00	6/2/2009 22:00	
9	Insert	Var8		BBV8	25.99	USD	1/2/2009 11:00	6/1/2009 19:00	
10	Insert	Var9		BBV9	4.49	USD	1/2/2009 11:00	6/2/2009 22:00	
11	Insert	Var10		BBV10	15.99	USD	1/2/2009 11:00	6/2/2009 22:00	
12	Insert	Var11		BBV11	25.99	USD	1/2/2009 11:00	6/2/2009 22:00	
13									

Figure 9

Step 2: Create necessary meta fields for the new catalog entries

For this example, no additional meta fields need to be created because the sample spreadsheet uses only the default attributes.

To create new meta fields follow these steps here.

- Go to the Administration system in Commerce Manager.
- Select the "Catalog System" folder and then "Meta Classes" node located in the left navigation frame.
- Select Create New, then New Meta Class from its pull-down menu.
 - Enter in a Name, Friendly Name (e.g., Baby Catalog), and some description (optional) for the meta class, and choose "Catalog Entry" for Entry Type.
 - Click OK to save the new class.

- Next Select Create New, then New Meta Field from its pull-down menu.
 - Enter in a Name, Friendly Name (e.g., Baby Diaper Size), and some optional description.
 - Also Choose the data type for this meta field and other properties by clicking on the checkboxes.
 - Click OK to save the new field.
 - Repeat the steps to create all the necessary fields.
- Associate the new meta fields to the meta class you created.
 - Select to "Meta Classes" node on the left navigation frame again.
 - For "Element" choose "Catalog Entry" in the pull-down menu.
 - Under "Type" choose your meta class (e.g., Baby Catalog) you created earlier.
 - Select the desired meta fields from the list displayed at the bottom of the screen.
 - Select OK to save the new meta class to fields association.
- You are done with setting up your meta fields.

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

Follow these steps to prepare the CSV files for import:

- Select the Catalog Management system.
- In the upper-left detail area, click on Catalogs folder and you will see the Catalog List view in the main area.
- In the action area above the main view, click the Import/Export drop-down button and select CSV Import Catalog.
- You will now see the CSV Import Catalog page in the main screen. The screen contains two tabs 1) CSV Import and 2) Mapping File, which we will be talking about next.

CSV Import Tab

- In the "CSV Import" tab in the main view, click "Add New File."
- Browse for the CSV file you wish to import, then click "Upload File."
- When you get the "Uploaded File:" confirmation, click "Save the file."
- The CSV file you uploaded will be added to the "Files available for import:" list.
- Repeat the previous four steps for each CSV file you wish to upload.

import catalog, please p	ick up an existing file from the grid below or upload a new one. Then cl	ick the button 'Start Import' to s	tart im
Add New File			
iles Available For Imp	port:		
Actions	File Name	Size	С
Download Delete	BabySalePrice.csv	151 bytes	То
Download Delete	BabyAssociations.csv	215 bytes	То
Download Delete	BabyEntryRelations.csv	354 bytes	То
Download Delete	BabyVariationInventoryPricing.csv	1.52 KB	То
Download Delete	BabyVariations.csv	1.20 KB	То
Download Delete	BabyPackages.csv	259 bytes	То
Download Delete	BabyProducts.csv	369 bytes	То
Download Delete	BabyStuffCategories.csv	274 bytes	То
1			
hoose mapping file.			
		Cine.	-

Figure 10

Step 4: Create a mapping file for each CSV file

Now create a mapping file that will specify the data in the CSV file to its corresponding attributes in the Commerce Manager.

Mapping file tab

• Click the "Mapping file" tab in the main view. You will now see the "Mapping file" tab view of the CSV Import Catalog view as shown in Figure 11.

F dik and aking a							
cuit existing mappi	ing ille.						
Load mapping nie.	abyProducts.xml	Load					
MetaClass, Langu	age			Data File And CSV	Adjustment		
Mapping Type:	Category w	/ Meta Data 🛛 👻		Data File:	BabyStuffCa	ategories.csv	*
Meta Class:	Default Cat	alog Node 😽		Delimiter:	1	~	
Language:	English (Unit	ted States)		Text Qualifier:		~	
				Encoding:	Default	*	
Fields and Attaihute		Column handers in the data file		Custom values			
Action (Insert/Update/	Delete or I/U/D)	Column 1 - Action	*	Custom values		-	
Code ^{1,2}		Column 2 - Category Code	*				
Parent Code		Column 3 - Parent Code	*				
Name ¹		Column 4 - Category Name	*				
Available from		Column 5 - Available from	~				
Expires on		<custom value=""></custom>					
Display Template		Column 1 - Action Column 2 - Category Code					
Available (True/False)		Column 3 - Parent Code Column 4 - Category Name Column 5 - Available from					
Sort Order		Column 6 - Expires on Column 7 - Available (True/False)					
SeoTitle (en-us)		Column 8 - Sort Order	~				
SeoUrl (en-us)			*				
SeoDescription (en-us)			*				
SeoKeywords (en-us)			*				
Display Name (en-us)			*				
Primary Image			*				
Description (en-us)			*				
Save mapping file.							
Enter file name.		vml 🗌	Sau	•			

Figure 11

Edit existing mapping file section

• Load mapping file: This section is used to retrieve previously created and saved mapping files. Since there is no existing mapping file in this example, leave this section blank.

Meta Class, Language section

- Mapping Type*: Select "Category w/ Meta Data"
- Meta Class*: Select "Default Catalog Node"
- Language*: English

Data fle and CSV adjustment section

- Data File*: The drop down values presented here are dependent on the different CSV data files you uploaded on the "CSV Import" tab in step 2.
- For this example, first choose "BabyStuffCategory.csv."Leave the rest of the field as default and move on to the next section.

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

The values presented under the "Fields and Attributes" column are representative of the "Meta Class" selected in the "MetaClass, Language" section above (which were either previously imported or created within Commerce Manager).

The values presented in the drop-down menus under the "Column headers in the data file" column are representative of the "Data file" selected in the "Data file and CSV adjustment" section above (which were previously imported above).

• Select the appropriate "Column header" drop-down value to "map" with the MetaClass "Fields and Attributes" to the left; the value selected will be reflected in the "Selected values" column to the right.

Save mapping file section

- Enter a file name for the "Enter file name" textbox. For this example, save the mapping files using the same CSV file names.
- Click the "Save" button. The browser returns to the CSV Import tab, and the mapping file in .XML format will be added to the list in the "Choose mapping file" section.
- Repeat Step 3 to create and save a mapping file for each CSV files you wish to import.
- For CSV Entry files, select the "Entry w/ Meta Data" option under "Mapping Type."
- For CSV Entry Relations file, select "Entry Relation".
- For CSV Associations file, select "Entry Association."
- For CSV Pricing/Inventory file, select "Variation w/ Inventory."
- For CSV Sale Pricing file, select "Sale Price."
- When all the mapping files are saved, your CSV Import tab screen should look something like this.

SV Import Mapping	file			
It is strongly recommen	ded that you back up your ECF database before perfo	rming import.		
To import catalog, please pic	k up an existing file from the grid below or upload a new one.	Then click the button 'Start Import' to st	tart importing.	
Add New File				
Files Available For Imp	ort:			
Actions	File Name	Size	Created	Last Updated
Download Delete	BabySalePrice.csv	138 bytes	Yesterday, 4:35 PM	Yesterday, 5:14 PM
Download Delete	BabyAssociations.csv	215 bytes	Yesterday, 4:33 PM	Yesterday, 4:33 PM
Download Delete	BabyEntryRelations.csv	354 bytes	Yesterday, 4:33 PM	Yesterday, 4:33 PM
Download Delete	BabyVariationInventoryPricing.csv	1.54 KB	Yesterday, 4:23 PM	Yesterday, 4:49 PM
Download Delete	BabyVariations.csv	1.20 KB	Yesterday, 4:23 PM	Yesterday, 4:21 PM
Download Delete	BabyPackages.csv	259 bytes	Yesterday, 4:21 PM	Yesterday, 4:21 PM
Download Delete	BabyProducts.csv	369 bytes	Yesterday, 4:21 PM	Yesterday, 4:21 PM
Download Delete	BabyStuffCategories.csv	274 bytes	Yesterday, 4:21 PM	Yesterday, 4:21 PM
1				Page 1 of 1 (8 items)
Choose mapping file.				
Actions	File Name	Size	Created	Last Updated
Download Delete	BabySalePrice.xml	2.82 KB	Yesterday, 4:43 PM	Yesterday, 4:56 PM
Download Delete	BabyAssociations.xml	2.09 KB	Yesterday, 4:42 PM	Yesterday, 4:42 PM
Download Delete	BabyEntryRelations.xml	1.97 KB	Yesterday, 4:42 PM	Yesterday, 4:42 PM
Download Delete	BabyVariationInventoryPricing.xml	6.22 KB	Yesterday, 4:41 PM	Yesterday, 4:50 PM
Download Delete	BabyVariations.×ml	4.12 KB	Yesterday, 4:40 PM	Yesterday, 4:40 PM
Download Delete	BabyPackages.xml	4.11 KB	Yesterday, 4:38 PM	Yesterday, 4:38 PM
Download Delete	BabyProducts.xml	4.14 KB	Yesterday, 4:38 PM	Yesterday, 4:38 PM
Download Delete	BabyStuffCategory.xml	4.63 KB	Yesterday, 4:37 PM	Yesterday, 4:37 PM
1				Page 1 of 1 (8 items)
Choose catalog for imp	ort.			
Catalogy In L. ey. (2				
BabyStuff	¥			
Start Import				

Figure 12

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

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

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

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

Step 6. Verify Your Import

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

Browsing Catalogs

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



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

- Accessories
- Imported
- Mixed Cases
- Wine Region

ME	RCE	Catalog List		Welcome	, admin
					🕜 Get Help F
🕍 N	ew Catalog	📔 💆 Import/Export 🔨 📄 More A	ctions T		
		Name	Available from	Expires	Available
	1 🐴	Wine	9/12/2011 11:11:00 AM	9/12/2021 11:11:00 AM	True

Clicking on the **Edit** icon, located between the check box and the folder icon, will display more information and settings of the particular catalog in the **Catalog Edit** page.

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

1ERCE	Catalog List		Welcome, admin	
	. @u		🕜 Get Help For Thi	s Page 🌲
Mew Catalo	og 📔 🗹 Import/Export 🍢 🗹 More Actions 🍢			
	Name	Available from	Expires	Available
🔲 🛃 🍳	💁 Wine	9/12/2011 11:11:00 AM	9/12/2021 11:11:00 AM	True

1EF	CE Node List	Welco	ome, admin	
			🕝 Get Help For This Pag	je 🔶
C	reate New 🔻 🛛 🖄 More Actions 🔻			
	Name	ID	Available from	Exp
	a / []			
	🛃 😑 Decanter	Decanter	1/1/2011 1:00:00 AM	1/1
	🛃 😡 Waiters Friend	WaitersFriend	1/1/2011 1:00:00 AM	1/1
	🛃 😡 Wine Glazz	WineGlass	1/1/2011 1:00:00 AM	1/1
	📷 💷 Enoteca Decanter 1000ml	F00146	1/1/2011 1:00:00 AM	1/1
	🛃 🕮 Enoteca Decanter magnum	35373	1/1/2011 1:00:00 AM	1/1
	🛃 颵 Enoteca Waiters' Friend Double Lever Corkscrew Blue	70631	1/1/2011 1:00:00 AM	1/1
	🛃 🕮 Enoteca Waiters' Friend Double Lever Corkscrew Red	70632	1/1/2011 1:00:00 AM	1/1
	📷 🔎 Enoteca Waiters' Friend Double Lever Corkscrew Yellow	70633	1/1/2011 1:00:00 AM	1/1
	📷 🔎 Enoteca Wine Glass Large	35368	1/1/2011 1:00:00 AM	1/1
	🗊 💷 Enoteca Wine Glass Small	35367	1/1/2011 1:00:00 AM	1/1

Searching for Catalog Entries

Introduction

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



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

If you enter keywords inside quotation marks ("white bordeaux"), then search will only fetch entries that have those exact three keywords.

IERCE E	Intry Search	
Search By Keyword(s):	white bordeaux	Search
Additional Filters		45
Filter By Language:	English (United States)	•
Filter By Catalog(s):	Wine	•
Search By Code/Id:		

Catalog Search Filters

To narrow entry search results, there are Additional Filters available. Click search once those filters are set.

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

Search By Keyword(s):		Search	
Additional Filters			13
Filter By Language:	English (United States)	•	
Filter By Catalog(s):	all catalogs	•	
Search By Code/Id:	3958		

Deleting and Cloning Entries

Г

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

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

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

Search By Keyword(s):	white bordeaux	Search	
Additional Filters			
Filter By Language:	English (United States)	•	
Filter By Catalog(s):	Wine	•	
Search By Code/Id:			
More Actions 🔻			
X Delete Selected			Code
Clone Selected	ltr		62012B
🔲 🖑 Chateau d'Yquem			61608B
🔽 🔎 Chateau d'Yquem			33228B
🔽 🔎 Chateau d'Yquem			33470B
🔲 🕅 Chateau d'Yquem			65987B
🔲 🔲 Chateau Suduirau	t		57149H

Paging and Sorting Results

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

۱ 🖄	More Actions ▼					
	Name	Code-	Available from	Expires	Status	
	🕅 J.L Terrier & C. Collovray	00008 Ascending	1/1/2011 1:00:00 AM	1/1/2020 1:00:00 AM	True	
	🕅 J.L Terrier & C. Collovray	00008H	1/1/2011 1:00:00 AM	1/1/2020 1:00:00 AM	True	
	🕅 J.L Terrier & C. Collovray	00009B	1/1/2011 1:00:00 AM	1/1/2020 1:00:00 AM	True	
	颵 Domaine des Deux Roches	00012H	1/1/2011 1:00:00 AM	1/1/2020 1:00:00 AM	True	
	Im Seifried	00042B	1/1/2011 1:00:00 AM	1/1/2020 1:00:00 AM	True	

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

🔲 🎯 Chateau Lafite Rothschild	22851B	1/1/2011 1:00:00 AM	1/1/2020 1:00:00 AM	True	
Charosu Doloper	22954B	1/1/2011 1:00:00 AM	1/1/2020 1:00:00 AM	True	
Cha 20 on-Longueville Baron	23416B	1/1/2011 1:00:00 AM	1/1/2020 1:00:00 AM	True	
50 100					
Page Size: 20				(1548 items)	Page 4 1 <u>2 3 4 5</u>

Creating Catalogs

Introduction

The **Catalog List** page, used to organize and manage catalogs, contains information regarding brands and sales items. These sets of information will either be displayed on the front-end site, or used for other purposes such as for pricing and *Promotions*.

Creating a Catalog

Do the following to create a new catalog:

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

MERCE	Catalog List
道 New Catalog	🖉 Import/Export 🔻 🛛 🌌 More Actions 🔻
	Name
🔲 🛃 🖄	Wine

- 2. Enter the details of the catalog in the Catalog Edit page. The following options are available:
 - Catalog Name this name will appear in the Catalog List Page ("Wine").
 - Catalog Owner designate an existing user as the Catalog owner.
 - Available from enter a date and time you want the catalog to be available and seen publicly.
 - Expires on enter the date and time you want to catalog to be unavailable and not be seen publicly.
 - **Default Currency** this setting will set the Default Currency for the relevant Catalog contents.
 - Default Language this will set the Default Language for the contents.

- **Base Weight** this assigns the weight units for the contents of the Catalog (e.g. pounds or kilograms). More units may be added.
- Other Languages you can also select other available Languages other than your default Language.
- **Sites** this determines the site/sites that the relevant Products will be displayed in, if you have multiple sites.
- **Sort Order** the Sort Order determines the order to which the Catalog appears in the Catalog List page.
- Available select "Yes" to make the Catalog contents appear on the front end site; select "No" to hide the Catalog from the front-end site.
- Once done setting up your catalog attributes, select OK to save the catalog. You will be brought back to the Catalog List with the new catalog. Select Cancel to cancel out of the Catalog Edit page and back to the Catalog List.

1ERCE	Catalog Edit
Overview	
Catalog Name:	Wine
	catalog name description
Catalog owner:	🔘 Not Set 🗸 🗸
Available from:	9/12/2011 11:11 AM
Expires on:	9/12/2021 11:11 AM
Default Currency:	Pound sterling
Default Language:	English (United States) 🔻
Base Weight:	in kilograms 🔻
Other Languages:	English (United States) German (Germany) Spanish (Spain) French (France)
Sites:	
Sort Order:	0
Available:	Yes No No
ОК Са	ancel

Setting the Availability of a Catalog

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

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

Creating Categories

Introduction

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

Creating a Category

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



2. This page will appear when creating a new category or editing an existing one. The **Catalog Node Edit** page will contain information of a **Node** selected from the **Node List** page.

MMER	CE Catalog Node Edit	Welcome, admir
iout 🔻	Cet Help F	For This Page
Overview	SEO Assets	4
Name:	Accessories	
	catalog node name description	
Available from:	9/27/2011 IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	
Expires on:	9/27/2014 12:53 PM	
Display Template:		
Code:	Accessories	
Sort Order:	0	
Available:	⊚Yes ⊘No	
Meta Class:	Region Catalog 💌	
Description (en-us):	B Z Ξ Ξ Styles ▼ ∽ ∽ ■ 💀 🕒 🗅 🐃 📦 🔍 🗷 🕬	IL
	Path:	1.

- 3. For available options, see below. Once done, click **OK** to save your changes.
 - Name enter a name for the product.
 - Available from the date to which the product is activated.
 - Expires on the date on which the product expires; once the expiration date passes, the product will no longer appear on the public site.
 - **Display Template** if applicable, chose a display template used to show the products in the public site from this drop-down box.
 - Code enter a product code here (e.g. Accessories)
 - Sort Order determines the order to which the product is sorted in the Node List page
 - Available select Yes to make the product appear on the public site; select No to hide the product from the public site
 - Meta Class the choice here dictates which of the meta-fields or product attributes will appear on the site.
 - Display Name enter a name the way you like to use on the public site.
 - Primary Image use the browse button to select and upload an image here.
 - **Description** enter a description of a product.
Creating a Subcategory

Creating a subcategory is similar to creating a high-level category.

- 1. Go to **Node List** and click through an existing catalog.
- 2. Click on **Create New** and click on **Category Node**. Specify the information under **Catalog Edit** (refer to Creating a Category) and click **OK** to save changes.

ERC	CE	Node List
Cre	eate New 🍸 🕴 遂	More Actions 🔻
	Name	
	🛃 🚞 Accesso	ries
	🛃 🗀 Importe	
	🛃 🚞 Mixed C	ases
	🛃 🚞 Wine Reg	gion
	~ -	
EKC	L	Node List
Cr	eate New 🕇 📔 💆	More Actions *
	New Category/N	ode fm
Θ	New Product	
. 🞯	New Variation/SI	cu
•	New Package	
#	New Bundle	
₫	New Dynamic Pa	ckage
	🛃 🕅 Enoteca	Decanter 1000ml
	🛃 🕅 Enoteca	Decanter magnum
	🛃 🕅 Enoteca	Waiters' Friend Double Lever Corkscrew Blue
	Enoteca	Waiters' Friend Double Lever Corkscrew Red
	Enoteca	Waiters' Friend Double Lever Corkscrew Yellow
	Enoteca	Wine Glass Large
	🛃 🖑 Enoteca	Wine Glass Small

Cloning, Moving or Linking Categories

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

Move/Link to Folder allows you either to move a category/product to a new location/hierarchy or to link one category/product to another category/product. You can for example create a category called "Featured Products" and link it to items across various other categories.

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

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

ERCE	Node List	
Create New V Name V V Acce Mare Mixe	More Actions Delete Selected Clone Selected Move/Link to folder Clone Selected Cases e Region	
Move/Link to F	older	×
🔘 move or 🔘 🗓	ink to folder Wine/Mixed Cases	•
	OK Close	e

SEO for Categories

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

Assets for Categories

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

Creating Products

Introduction

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

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

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

Creating a Product

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

IERCE Node	e List
Create New 🔻 📔 🍘 More Actio	ons •
 New Category/Node New Product New Variation/Sku New Package New Bundle 	ıns

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

IERCE	Pro	oduct E	dit				
Overview	Variation	ns/SKUs	SEO	Associati	ons	Assets	Relations
Name:							
Available from:		5/3/2012			10:22	AM	
Expires on:		5/3/2022			10:22	AM	
Display Template	:	Wine Temp	late 🔻				
Code:							
Sort Order:	•	0					
Available:	1	© Yes	er for the	category en	itry.		
Meta Class:		Wine SKU		-			
Alcohol (en-us):]			
Closure (en-us):		Alcohol by v	olume me	asurement			
Color (en-us):	1	The closure	mechanis	m of the win	ie –		
color (en-us).	L	The color of	the sku				
Description (en-	us):						

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

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

Enter description here Display Name (en-us): Margin Percentage (en- us): The margin percentage of the SKU
Enter description here Display Name (en-us): Margin Percentage (en- us): The margin percentage of the SKU
Enter description here Display Name (en-us): Margin Percentage (en- us): The margin percentage of the SKU
Enter description here Display Name (en-us): Margin Percentage (en- us): The margin percentage of the SKU
Enter description here Display Name (en-us): Margin Percentage (en- us): The margin percentage of the SKU
Margin Percentage (en- us): The margin percentage of the SKU
Margin Percentage (en- us): The margin percentage of the SKU
I ne margin percentage of the SKU
Maturity (en-us):
Maturity
Organic (en-us):
If the wine adheres to organic production principles.
Primary Image (en-us): Browse
Primary Image
Recommendation Boost
(en-us): An integer that can be used to boost the visibility of products in recommendation lists.
Region (en-us):
Region
Size (en-us):
Style (en-us):
The style of the wine
Taste (en-us):
The taste rating of the wine.
Grape mix (en-us):
The grape varieties in the wine
True In False
Suitable for vegans Venetarians (en-us):
True False
Suitable for vegetarians Vintage (en-us):
Vintage

Adding Variations/SKUs

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

- 1. Select the Variations/SKUs tab
- 2. Within the drop-down menu next to **Find Item**, select from the list variations or SKUs to associate with the product.
- 3. Click on Add Item.

You can add multiple associations to the product and they will appear in a list under the column headers below.

IERCE	Product E	dit							
Overview	Variations/SKUs	SEO	Associations	Assets		Relations			
Find Item:					Ŧ	Add Item			
	Chateau d'Yquem								
Edit Comr	🕅 Chateau d'Yquem					Q	ty Group	Sort Ord	ler
⊿ ∣>	M Chateau d'Yquem					1	default	0	
⊿ >	🕅 Chateau d'Yquem					1	default	0	
1	🕅 Chateau d'Yquem							Page 1 of 1 (2	items)
	M Chateau Suduiraut								
ОК	M Chateau Climens								
	🕅 Bonneau Du Martray								
	M Sylvain Loichet			45					
	M Chandon de Briailles				-				

IERCE	P	Product E	dit						
Overview	Variati	ions/SKUs	SEO	Associations	Assets	Relations			
Find Item: Bo	nneau Di	u Martray				▼ Add I	tem	\$	
Edit Comman	d ID	Name					Qty	Group	Sort Order
∎/ ×	2762	Enoteca Wine	Glass Sma	all			1	default	0
⊿ ×	2763	Enoteca Wine	Glass Larg	ge			1	default	0
1								Pag	e 1 of 1 (2 items)
ОК	Cancel								

SEO for Products

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

Associations for Products

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

Assets for Products

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

Relations for Products

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

Creating Variations (SKUs)

Introduction

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

Creating a Variation/SKU

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

1ERCE	Nod	e List				
	A 14 4	· •				
	More Act	ions *				
📄 New Categor	y/Node					
😑 New Product	O New Product					
New Variation/Sku						
🕀 New Package						
🛔 New Bundle						
🖶 New Dynami	c Package	1000ml				
🔲 🛃 🕅 Enot	teca Decanter	magnum				

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

ERCE	Variation/SKI			dit				
Overview	Pricing/In	ventory	SEO	Association	15	Assets	Relations	
Name:		Enoteca W	ine Glass I	Large				
Available from:		1/1/2011			01:0	00 AM		
Expires on:		1/1/2020			01:0	MA 00		
Display Template	2:	Wine Tem	plate 🔻	·				
Code:		35368						
Sort Order:		0						
Available:		The sort of Yes	rder for th No	ie category er	ntry.			
Meta Class:		Default Ca	atalog Entr	γ -				
Display Name (er	n-us):	Enoteca W	ine Glass I	Large				
Primary Image (e	en-us):						Bro	owse

Primary Image

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

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

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

Adding Pricing/Inventory Details

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

Overview Prie	cing/Inventory	SEO A	Associations	Assets	Relations				
Display Price: (gbp)	8.60						In Stock:	1000	
Min. Quantity:	1.0000						Reserved:	0	
Max. Quantity:	200.0000						Reorder Min. Qty:	0	
Merchant:	select merchant 🔻						Allow Preorder:	O Yes	۲
Weight:	0.75						Preorder Qty:	0	
Package:	select package 🔻						Preorder Avail.:	1/1/2020)
Tax Category:	select tax category	•					Allow Backorder:	Yes	۲
Warehouse:	select warehouse	•					Backorder Qty:	0	
Track Inventory:	Yes No						Backorder Avail.:	1/1/2020)
Inventory Status:	Enabled 🔻								
Pricing Add Item									
Edit Command	Sale Type	Si	ale Code	Current	y Price	Min. Quantity	Start Date	E	nd Da
⊿ ⊥×	All Customers	12	235555	GBP	0.00	0	Today, 2:55 PM	2/	22/20
1									Pa
OK Canc	el								

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

Edit Sale F	Price Information	x
Sale Type:	All Customers 🔹	
Sale Code:		
Unit Price:	0.00	
Currency:	Pound sterling 🔹	
Min. Quantit	Y:0.00	
Start Date:	2/22/2012	02:55 PM
End Date:	2/22/2013	02:55 PM
		Save Changes

Field	Description
Display Price	Enter the price that will be displayed on the public site.
Min Quantity	This sets the minimum quantity the customer is able to purchase the var- iation/SKUs product page.
Max Quantity	This is the maximum allowable number of items that can be purchased at one time (this number gets displayed as the upper range in the drop-down during the checkout process).
Merchant	Optional : if you use many merchants on your site, this provides another way to add more information for a product; this can only be added/edited directly in the database so please contact your site administrator/developer to make any changes.
Weight	Based on your shipping configuration, the weight you enter here will affect the total shipping cost .
Package	This value is based on width/length/height dimensions; the options for this drop-down are configured in the Administration area.
Tax Category	This separation of taxes by category allows you to charge a different rate of taxes depending on what is being purchased; for example, you can have one rate for "General Sales" items and another rate for "Luxury Sales" items.
Warehouse	The details on the available selections are maintained in the Administration system.
Track Inventory	Yes/No. If this is set to "Yes," then the quantity value of In Stock, Preorder, and Backorder fields will be deducted each time a purchase is made. If this is set to "No," then those values will not change.
Inventory Status	Enable/Disable. If this is Enabled , then the number of units of a product being purchased cannot exceed the inventory value. In other words, the check out procedure cannot be completed if you exceed the number in the inventory instead the quantity you can purchase will default to the actual number of remaining units. For instance, if you have Tracking Inventory = Yes, and Inventory Status = Disabled/Ignored, then the available quantity will be monitored, but it will not limit the number of units that can be checked out. If you only have a quantity of 5 and you order 6 items, the checkout will still complete and the inventory number will become -1.
In Stock	You can enter the quantity of a particular product available for sale.
Reserved	The quantity you set here allows you to reserve a specified number of inven- tory "In Stock" and prevent them from being used. So for instance, if you set the In Stock = 10 and Reserved = 5, then the In Stock count will not go below 5.
Reorder Min Qty	If the inventory falls below the value specified here, then this item will appear

Field	Description
	in the "Low Stock Report" in the Dashboard or Reporting system.
Allow Pre- order/Backorder	Yes or No; you need to set Allow Preorder/Backorder status to Yes to turn either of these features On .
Preorder/Backorder Avail	When you turn on either of the two and specify a quantity, the count will begin to decrease after the In Stock count reaches its limit. For example, if you set In Stock = 10, Reserved =3, and Backorder =10, then the Backorder qty will start to decrease after In Stock count reaches 3. So if you place an order for 10 units, then the final count will be In Stock = 3, Reserved =3, and Backorder = 7.
Backorder Qty	The quantity you set here will determine the backorders that can be made by customers even when the item is out of stock.
Pricing	 Sale Type - you can select All Customers, a single Customer or a Customer Price Group (the Customer Price Group gives you the ability to create tiered pricing). Sale Code - This is an optional setting. The Sale Code field is used for assigning a price to a specific group of customers. For instance, when you add a new price and select "Customer Price Group" as the Sale Type, you need to put the name of the customer group in the Sale Code field. The name of the group that you put in the Sale Code field needs to match one of the group names found under Customer Management > Contacts > (Name of Contact). If your entry into the Sale Code field matches one of the Customer Groups, any member of that group will receive the specified price. Unit Price - discounted price per unit *Currency * enter currency using the correct currency code (i.e. GBP); you can create different prices depending on the currency that is selected. Min. Quantity - minimum number of units you must purchase to get the discounted bulk rate.



A SKU can only have one warehouse associated to it.

SEO for Variations/SKUs

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

Associations for Variations/SKUs

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

Assets for Variations/SKUs

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

Relations for Variations/SKUs

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

Creating Packages

Introduction

A **package** is an offering of numerous items, but it is comparable to an individual SKU because the package items must be purchased as a whole. For example, the matching shirt and hat combination is shrink-

wrapped together and sold as a single unit. The package has its own SKU and it is displayed as a single line item in the user's shopping basket.

Creating a Package

- 1. Click on Catalogs. The Catalog List appears in the main window.
- 2. Click on an existing catalog name highlighted in blue. The Node List window appears.
- 3. Click on **Create New** pull-down menu located in the upper left part of the main window.
- 4. On the drop-down menu, select New Product Package. The Product Package Edit page appears.

Enter basic information for the product package:

- Name a name for the Product Package
- Available from the date to which the Product Package is activated
- Expires on the date on which the Product Package expires; once the expiration date passes, the Product Package will no longer appear on the public site
- **Display Template** choose a display template used to show the Product Package in the public site from this drop-down box.
- Code enter a Product Package code here.
- Sort Order determines the order to which the Product Package is sorted in the Node List page.
- Available select Yes to make the Product Package appear on the public site; select No to hide the product from the public site
- Meta Class the choice made here dictates which the meta-fields or Product Package attributes will appear on the public site or Commerce Manager site

Adding Pricing/Inventory Details

- Display Price the price that will be displayed in public site
- **Min Quantity** this forces your customer to purchase a minimum number of items as set here (this number gets displayed as the lower range in the drop-down during the checkout process)
- **Max Quantity** this is the maximum allowable number of items that can be purchased at one time (this number gets displayed as the upper range in the drop-down during the checkout process)
- Merchant (optional) if you use many merchants on your site, this provides another way to add more information for a product; this can only be added/edited directly in the database so please contact your site administrator/developer to make any changes
- Weight based on your shipping configuration, the weight you enter here will affect the total shipping cost
- **Package** this value is based on width/length/height dimensions; the options for this drop-down are configured in the Administration area
- Tax Category this separation of taxes by category allows you to charge a different rate of taxes depending on what is being purchased; for example, you can have one rate for "General Sales" items and another rate for "Luxury Sales" items
- Warehouse the details on the available selections are maintained in the Administration Subsystem
- **Track Inventory** Yes/No. If this is set to "Yes," then the quantity value of In Stock, Preorder, and Backorder fields will be deducted each time a purchase is made. If this is set to "No," then those values will not change.
- Inventory Status Enable/Disable. If this is Enabled, then the number of units of a product being purchased cannot exceed the inventory value. In other words, the check out procedure cannot be

completed if you exceed the number in the inventory -- instead the quantity you can purchase will default to the actual number of remaining units. For instance, if you have Tracking Inventory = Yes, and Inventory Status = Disabled/Ignored, then the available quantity will be monitored, but it will not limit the number of units that can be checked out. If you only have a quantity of 5 and you order 6 items, the checkout will still complete and the inventory number will become -1.

- In Stock you can enter the quantity of a particular product available for sale
- **Reserved** The quantity you set here allows you to reserve a specified number of inventory "In Stock" and prevent them from being used. So for instance, if you set the In Stock = 10 and Reserved = 5, then the In Stock count will not go below 5.
- **Reorder Min Qty** If the inventory falls below the value specified here, then this item will appear in the "Low Stock Report" in the Dashboard or Reporting subsystem.
- Allow Preorder/Backorder Yes or No; you need to set Allow Preorder/Backorder status to Yes to turn either of these features On.
- **Preorder/Backorder Avail** When you turn on either of the two and specify a quantity, the count will begin to decrease after the In Stock count reaches its limit. For example, if you set In Stock = 10, Reserved =3, and Backorder =10, then the Backorder qty will start to decrease after In Stock count reaches 3. So if you place an order for 10 units, then the final count will be In Stock = 3, Reserved =3, and Backorder = 7.
- Backorder Qty The quantity you set here will determine the backorders that can be made by customers even when the item is out of stock.

Pricing .

- **Sale Type** you can select All Customers, a single Customer or a Customer Price Group (the Customer Price Group gives you the ability to create tiered pricing).
- Sale Code (optional) enter code to give special pricing for a group of Customers (for instance Dealers).
- Unit Price discounted price per unit.
- **Currency** enter currency using the correct currency code (for instance USD); you can create different prices depending on the currency that is selected.
- Min. Quantity minimum number of units you must purchase to get the discounted bulk rate.

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

Adding Package Items

In the drop-down, you can search through your entire inventory and select items to add to your package by clicking **Add Item**. Clicking the **Edit** icon beside the item you just added will allow you to specify the **Quantity**, the **Group Name** and the **Sort Order**.

SEO for Packages

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

Associations for Packages

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

Assets for Packages

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

Relations for Packages

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

Creating Bundles

Introduction

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

Creating a Bundle

- 1. Click on Catalogs. The Catalog List appears on the main window.
- 2. Click on an existing catalog name highlighted in blue. The Node List window appears.
- 3. Click on Create New pull-down menu located in the upper left part of the main window.
- 4. On the drop-down menu, select New Bundle. The Bundle Edit page appears.

Enter basic information for the bundle:

- Name a name for the Bundle
- Available from the date to which the Bundle is activated
- Expires on the date on which the Bundle expires; once the expiration date passes, the Bundle will no longer appear on the public site
- **Display Template** choose a display template used to show the Bundle in the public site from this drop-down box.
- Code enter a Bundle code here.
- Sort Order determines the order to which the Bundle is sorted in the Node List page.
- **Available** select Yes to make the Bundle appear on the public site; select No to hide the product from the public site
- Meta Class the choice made here dictates which the meta-fields or Bundle attributes will appear on the public site or Commerce Manager site

Adding Bundle Items

In the drop-down, you can search through your entire inventory and select items to add to your bundle by clicking **Add Item**. Clicking the **Edit** icon beside the item you just added will allow you to specify the **Quantity**, the **Group Name** and the **Sort Order**.

SEO for Bundles

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

Associations for Bundles

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

Assets for Bundles

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

Relations for Bundles

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

Creating Dynamic Packages

Introduction

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

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

Creating a Dynamic Package

- 1. Click on Catalogs. The Catalog List appears on the main window.
- 2. Click on an existing catalog name highlighted in blue. The Node List window appears.
- 3. Click on **Create New** pull-down menu located in the upper left part of the main window.
- 4. On the drop-down menu, select **New Dynamic Package**. The Product Dynamic Package Edit page appears.

Enter basic information for the dynamic package.

- Name a name for the Dynamic Package
- Available from the date to which the Dynamic Package is activated
- Expires on the date on which the Dynamic Package expires; once the expiration date passes, the Product Package will no longer appear on the public site
- **Display Template** choose a display template used to show the Dynamic Package in the public site from this drop-down box.
- Code enter a Dynamic Package code here.
- Sort Order determines the order to which the Dynamic Package is sorted in the Node List page.
- Available select Yes to make the Dynamic Package appear on the public site; select No to hide the product from the public site
- Meta Class the choice made here dictates which the meta-fields or Dynamic Package attributes will appear on the public site or Commerce Manager site

Adding Package Items

In the drop-down, you can search through your entire inventory and select items to add to your dynamic package by clicking **Add Item**. Clicking the **Edit** icon beside the item you just added will allow you to specify the **Quantity**, the **Group Name** and the **Sort Order**.

SEO for Dynamic Packages

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

Associations for Dynamic Packages

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

Assets for Dynamic Packages

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

Relations for Dynamic Packages

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

Managing Catalog Details

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

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

SEO for Catalog Items

Introduction

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

Adding SEO Attributes

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

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

ERCE	Catalog Node Edit				
Overview SE	O Assets				
Title (en-us):	Wine Accessories				
Url (en-us):	Accessories.aspx				
Description (en-us)	Description (en-us): Accessories for the finest selections				
Keywords (en-us):	glass cases	*			
OK Can	icel				

Associations for Catalog Items

Introduction

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

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

Adding a Product Association

Do the following to add a product association:

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

Product Edit				Welcome, admin
				🕜 Get Help For This Page 🗧
Overview Variations/SKUs SEO	Associations	Assets	Relations	
Add an association				
Modify Existing Association:				Celeter Edit Details Modify Association Delete
OK Cancel				

- 2. When the pop-up appears, enter information in the following fields:
 - Name name of the association. This name cannot have spaces (ex: Related Items would be entered as "Related_Items").
 - Description the description to detail what this association is.
 - Sort Order determines in what order this association is displayed in the associations drop-down list.

Edit Asso	ciation Information	x
Name:	cts Enter association name.	
Description		
Sort Order:	Enter association description. I Enter sort order.	
		Save Changes

Once you're done, click on Save Changes.

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

Overview Pricing/Inve	entory SEO	Associations	Assets	Relations			
Add an association							
Modify Existing Association:	СТ5				▼ Edit Details	Modify Association	Delete
OK Cancel							

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

		11.				Welcome, admin	
IERCE	Product E	dit					
						🕜 Get H	elp For This
Overview	Variations/SKUs	SEO Associations	Assets R	elations			
Add ar	n association						
Modify Exi	sting Association: CTS			•	dit Details M	odify Association	Delete
CTS CTS							
Pick Item:	Sylvain Loichet		▼ Add	ltem			
Edit C	ommand Name			Sort Order	Туре		
					Page 1 of 0 (0 items)		
ОК	Cancel						

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

1ERCE	Product	Edit				
Overview	Variations/SKUs	SEO	Associations	Assets	Relations	
Add an	association					
Modify Exis	ting Association:					•
CTS CTS						
Pick Item:	Chateau Climens			•	Add Item	
Edit Co	🕅 Chateau d'Yquem				Sort (Order
	🕅 Chateau d'Yquem				0	
1	🕅 Chateau d'Yquem					
'	🕅 Chateau d'Yquem					
ОК	🕅 Chateau d'Yquem					
	🕅 Chateau Suduiraut					
	Chateau Climens					
	🕅 Bonneau Du Martra	у	13			
	🕅 Sylvain Loichet					
	🕅 Chandon de Briaille	s		-		

6. Once you click on **Add Item**, the item will appear in a list just below. You can have more than one item tied to an association.

C	TS TS				
	Pick Item:	Chateau Cl	imens 🗸 Add	ltem	
	Edit Co	ommand	Name	Sort Order	Туре
	=/	×	Sylvain Loichet	0	OPTIONAL
	=	×	Chateau Climens	0	OPTIONAL
	1				Page 1 of 1 (2 items)
	ОК	Cancel			

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

Assets for Catalog Items

Introduction

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

Adding an Asset to a Product

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

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

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

IER	CE	Product	Edit					
Ove	erview	Variations/SKUs	SEO	Associations	Assets	Relatio	ons	
Find	Assets:					•	Add Asset	
Grou	up Name:	Boot/				-		
		Coot/Video/						
Ec	dit Comma	🗀 Root/Presentatio	ns/				Group	Sort Order
		🛅 Root/Specificatio	ons/		20	=		Page 1 of 0 (0 items)
_		🛱 Root/Software/						
0	K	🛅 Root/Downloads	/					
		🛅 Root/User Guide	s/					
		🛅 Root/Images/						
		🛅 Root/Images/Pa	ckage00/					
		🛱 Root/Images/Pa	ckage00/	72667B/				
		🛱 Root/Images/Pa	ckage00/	72667B/Small/				
		🛱 Root/Images/Pa	ckage00/	72667B/Medium/				
		🛱 Root/Images/Pa	ckage00/	72649B/				
		🛱 Root/Images/Pa	ckage00/	72649B/Small/				
		🛱 Root/Images/Pa	ckage00/	72649B/Medium/				
		🛱 Root/Images/Pa	ckage00/	72644B/				
		🛅 Root/Images/Pa	ckage00/	72644B/Small/				
		🛱 Root/Images/Pa	🗀 Root/Images/Package00/72644B/Medium/					
		🛱 Root/Images/Pa	ckage00/	65990B/				
		Root/Images/Pa	ckage00/	65990B/Small/		-		

3. Enter a Group Name.

By default EPiServer Commerce offers three options with names that will allow the associated assets to be correctly displayed on the product details page of the public site.

- Image (type as "image," all lowercase) thumbnail icon(s) will appear on the product details page.
- Downloads a "Downloads" tab will appear towards the bottom of the details page.
- Specifications a "Specifications" tab will appear towards the bottom of the details page.

Overview	Pricing/In	ventory	SEO	Associations	Assets	Relations			
Find Assets:	Root/Preser	ntations/				▼ Add A	sset		
Group Name:	Group Name: PowerPoint								
Edit Comm	and	ID	Туре	Name		Group	Sort Order		
							Page 1 of 0 (0 items)		
ОК	Cancel								

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

Overview	Pricing/Inventory SEO Associations Assets Relation				ts Relations					
Find Assets:	s: Root/Presentations/Presentation Powerpoint.pptx									
Group Name:	Group Name: default									
Edit Comm	and	ID	Туре	Name	Group	Sort Order				
	×	1	file	Root/Presentati	default	0				
1						Page 1 of 1 (1 items)				
ОК	Cancel									

5. Once done, click **OK** and the new category/node will be created. You will be redirected to the Node List. Otherwise, select **Cancel** to go back to the Node List without saving any changes

Relations for Catalog Items

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

IERCE	Product	Edit				Welcome, ac	imi
						0	G
Overview	Variations/SKUs	SEO	Association	ns Assets	Relations		
ID	Name		C	atalog Full Path			1
× Accesso	ries Accessories		Wi	ne\Accessories			
1						Page 1 of 1 (1 item	5)
ОК	Cancel						

Using Meta Classes and Fields

Introduction

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

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

Adding Meta Fields to a Meta Class

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

Dashboard CMS Commerce Add-ons EPISERVER Image: Text and te										
EPiserver CC	PISERVER COMMERCE Meta Fields Wekome, admin									
Nelcome 🔻 Change Language About 🛪 😯 Cet Help For This Page 🌻										
Administration 🁌	🕸 New Meta	Field								
Administration	ID	Name	Туре	Multi-Language	Compare	Search	History	Friendly Name		
🗄 🦲 System Settings	25	ABV	Decimal	False	True	True	True	Alcohol		
🖃 😋 Catalog System	26	Closure	ShortString	True	True	True	True	Closure		
Warehouses	27	Color	ShortString	True	True	True	True	Color		
Tax Categories	28	Description	LongHtmlString	True	False	True	False	Description		
m Meta Classes	29	DisplayName	ShortString	True	True	True	False	Display Name		
m Mata Eields	30	ExtendedDesription	LongHtmlString	True	False	True	False	Extended Desription		
	31	Margin	Decimal	False	True	False	True	Margin Percentage		
	32	Maturity	ShortString	True	True	True	True	Maturity		
	33	Organic	Boolean	False	True	False	True	Organic		
	34	PrimaryImage	ImageFile	False	False	False	False	Primary Image		
	35	RecommendBoost	Integer	False	False	False	True	Recommendation Boost		
	36	Region	ShortString	True	True	True	True	Region		
Dashboard	37	Size	Float	False	True	True	True	Size		
M Curtania Management	38	Style	ShortString	True	True	True	True	Style		
Customer Management	39	Taste	ShortString	False	True	True	True	Taste		
Catalog Management	40	Type	ShortString	True	True	True	True	Туре		
·····	41	Varieties	ShortString	True	True	True	True	Grape mix		
Crder Management	42	Vegans	Boolean	False	True	False	True	Vegans		
	43	Vegetarians	Boolean	False	True	False	True	Vegetarians		
Marketing	44	Vintage	ShortString	True	True	True	True	Vintage		
Asset Management										
Reporting	•		III					۱.		
Administration	Page Size:	20 💌						(20 items) Page ∢ 1 ⊧		

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

Name:	Maturity
Friendly Name:	Maturity
Description:	Maturity
Туре:	Short String
	Supports Multiple Languages
	 Use in comparing Allow Null Values Save History Use Encryption
Search Properties:	 Allow Search Enable Sorting Search Results Include Values in Search Results Tokenize Include in the Default Search
Call	icei

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

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

Adding Meta Field to a Catalog Meta Class

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

Catalog Batch Update

Introduction

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

Updating Multiple Catalog Entries

Do the following to update multiple catalog entries:

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

EPISERVER COM	MERCE	Batch Updat	e				Welcon			
Welcome [*] Change Language About [*]										
Catalog Management 💦 🍣	Main Adju	stment		Additional Filter	5					
Catalog Management Catalog Entry Search Catalog Batch Update Catalogs Catalogs Catalogs Templates	Entry Type: Meta Class:	Variation/Sku	•	Language: Catalog/Category:	English (United States) all catalogs					
	Field: Entry : Name Keyword(s): Save All									
	Name			Entry : Name						
	Enoteca Wine Glass Small			Enoteca Wine Glass Small						
	🕮 Enoteca W	ine Glass Large		Enoteca Wine Glass L						
	🕅 Enoteca W Blue	Enoteca Waiters' Friend Double Lever Corkscrew			Enoteca Waiters' Friend Double Lever Corkscrew Blue					
	🔎 Enoteca W Red	aiters' Friend Double Lever Cork	screw	Enoteca Waiters' Frie	end Double Lever Corkscrew Red					
	Enoteca W Yellow	aiters' Friend Double Lever Cork	screw	Enoteca Waiters' Frie	end Double Lever Corkscrew Yellow					
	🕅 Enoteca D	ecanter 1000ml		Enoteca Decanter 10	00ml					
	🔲 Enoteca D	ecanter magnum		Enoteca Decanter ma	agnum					

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

once.

CPISERVER COMMERCE Batch Update Welcome, adm										
Welcome 🔻 Change Language 🛛	Welcome 🔻 Change Language About 👻 🕜 Get Help For This Page 🂠									
Catalog Management 🏻 🍣	Main Adjustment	Additional Filters								
Catalog Management	Entry Type: all types	Language: English (United States)								
Catalog Batch Update	Meta Class: Default Catalog Entry	Catalog/Category: all catalogs								
Catalogs	Field: Entry : Name	Keyword(s): Apply Filter								
H in remplates	Save All									
	Name	Entry : Name								
	Enoteca Wine Glass Small	Enoteca Wine Glass Small								
	🕮 Enoteca Wine Glass Large	Enoteca Wine Glass Large								
	Enoteca Waiters' Friend Double Lever Cork	kscrew Enoteca Waiters' Friend Double Lever Corkscrew Blue								
Dashboard	Enoteca Waiters' Friend Double Lever Cork Red	kscrew Enoteca Waiters' Friend Double Lever Corkscrew Red								
Customer Management	Enoteca Waiters' Friend Double Lever Cork Yellow	Enoteca Waiters' Friend Double Lever Corkscrew Yellow								
Catalog Magement	Enoteca Decanter 1000ml	Enoteca Decanter 1000ml								
Drder Management	颵 Enoteca Decanter magnum	Enoteca Decanter magnum								
Marketing	Gass Wine Glass	Wine Glass								
	⊖ Waiters Friend	Waiters Friend								
Asset Management	Decanter	Decanter								
Reporting	•	III. F								
Administration	Page Size: 20 💌	(12 items) Page ∢ 1 ≽								

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

Editing and Deleting Catalogs

Introduction

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

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

Editing a Catalog

Do the following to edit a product catalog:

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

1ERCE	Catalog Edit
Overview	
Catalog Name:	Wine
	catalog name description
Catalog owner:	💿 Not Set 👻
Available from:	9/12/2011 11:11 AM
Expires on:	9/12/2021 III:11 AM
Default Currency:	Pound sterling -
Default Language:	English (United States) 🔻
Base Weight:	in kilograms 🔻
Other Languages:	English (United States) German (Germany) Spanish (Spain) French (France)
Sites:	
Sort Order:	0
Available:	í Yes │ No
OK Ca	incel

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

Deleting a Catalog

Do the following to delete a product catalog:

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

MERCE	Catalog List							
🕍 New Catalog	💆 Import/Export 🔻	More Actions 🔻						
	Name	X Delete Selected						
	wine	U						



Cloning, Moving, Linking and Deleting

Introduction

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

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

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

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



Cloning a Category/Catalog Entry

Do the following to clone a category/catalog entry:

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

Moving a Category/Catalog Entry

Do the following to move a category/catalog entry:

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

Linking a Category/Catalog Entry

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

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

Deleting a Category/Catalog Entry

Do the following to delete a category/catalog entry:

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

Order Management

Introduction

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

Meta Classes and Fields for Products

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

characteristic for wine, for instance "color", "taste", "vintage" and "maturity".

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

Working With Order Management

The work with orders includes the following tasks:

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

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

Browsing Orders

Introduction

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

Using Order Search to Find Existing Purchase Orders

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

EPISERVER COMMERCE Order Search								
Welcome * Change Language About *								
Order Management 🍣	Class Type:	Purchase Order		Return #:				
🖃 🦉 Order Management	Status: [Any]		•	ID:				
- Q Order Search	Date Range:	All	•	Custome	r:			Search
Purchase Orders Today	D ID	Customer			Total		Status	Last Modified
This Week	PO048	5 Mary Smith				\$39.98	In Progress	Today, 11:46 AM
D This Month	PO085	0 Mary Smith				\$59.98	Cancelled	Today, 10:49 AM

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

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

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

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

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

Viewing Purchase Orders by Date or Status

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

COMMERCE Order List							
Welcome 🔻 Change Language About 🔻							
Order Management 🍣	N	lew Order 🗙	Delete Selected				
🖃 💘 Order Management		ID	Customer		Total	Status	Last Modified
Q Order Search		PO0485	Mary Smith		\$39.98	In Progress	Today, 11:46 AM
😑 🛅 Purchase Orders		PO0850	Mary Smith		\$59.98	Cancelled	Today, 10:49 AM
- O Today		PO7657	Hiep Khuc		\$499.98	In Progress	Today, 10:26 AM
Inis week This Month							

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

EPiserver Comm	ERCE	Orders by Sta	tus					
Velcome + I Change Language About *								
Order Management 🍣	New Order	Collete Selected						
🖃 🐙 Order Management	D ID	Customer	Total	Status	Last Modified			
Q Order Search	PO0485	Mary Smith	\$39.98	In Progress	Today, 11:46 AM			
Purchase Orders	PO7657	Hiep Khuc	\$499.98	In Progress	Today, 10:26 AM			
OnHold	PO3851	Hiep Khuc	\$967.44	In Progress	2/18/2011 11:48:36 AM			
PartiallyShipped	PO1537	Hiep Khuc	\$451.99	In Progress	2/18/2011 9:58:27 AM			
- 🗀 InProgress								
Completed								
- 🗀 Cancelled								
AwaitingExchange								

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



Creating Orders

Introduction

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

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

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

Creating an Order from Order List

1. Go to Order Management > Purchase Orders.

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

Dashboard CMS C Commerce Manager Set	ommerce tings	Add-ons			EPISERVER	₹?	💄 admin	Q
EPISERVER CO	OMMER	CE	Order List				Welcome,	admin
Welcome 🔻 Change Language	About 🔻					🕜 Get H	elp For This Pa	ge 🗢
Order Management 🛛 🍣	New Orde	er 🔄 New Payme	nt Plan	o Cart				
🚊 💘 Order Management	D ID		er New Order				×	
🔍 Order Search							<u>^</u>	
🖃 📋 Purchase Orders			Site:	[No sites available]				
Today			Customer	0.000			=	
This Week This Month			customer	Mot Set				
							*	
😠 🧰 Purchase Orders By Stati	L L							
🗉 🧰 Carts				🗸 ок 📐 🗙	Cancel			
😠 🧰 Payment Plans (recurring	ç			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~				
🗄 🧰 Shipping/Receiving								
	3							
Dashboard								
Customer Management								
Catalog Management								
	-							
o o								
Marketing								
Asset Management								
Reporting	1							
Administration	Page Size:	20 💌					(0 items) Pa	ige∢⊧

3. Click $\ensuremath{\text{OK}}$ once your selections are made .

Filling Out the Purchase Order

1. Enter basic order information.

-Basic Order Info	
Customer:	admin
Currency:	US dollar 🗨
Coupon Code:	1234567 🗸 Apply

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

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

🗐 New Item 🗙 Delete					
	ID	Name			
Page Size: 20 💌					

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

New Lir	New Line Item								
bordeau	x Find Advanced Se	arch				-			
Picture	Name	Catalog	Туре	Price	In Stock				
\bigcirc	Mixed Cases	France	Variation	£8,546.05	1000	*			
\bigcirc	Ch. Plantey Canteloup	France	Variation	£6.95	1000				
\bigcirc	Chateau Langoa-Barton	France	Variation	£47.00	1000	Ξ			
\bigcirc	Chateau Bellevue	France	Variation	£43.00	1000				
\bigcirc	Chateau Pichon-Longueville Lalande	France	Variation	£215.00	1000				
Page S	▼ Page Size: 20 ▼ (584 items) Page < 1 2 3 4 5 >								
			Cancel Co	nfigure Selecte	ed Entry				

Advanced Search

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

New Lineltem			
	Find	Advanced Search	
Select catalog	 Select language 	 Select entry type 	-

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

Configuring the Selected Entry

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

New Line Item								×
Selected Entry: Ch	ateau Langoa-Barton							^
Display Price:	£47.00						Â	
Price:	47.00							
Quantity:	1						=	
	In Stock: 1000. Rese	rved: 0.					-	
Discount:	enter descr here Discount description	0 on amou	Percentage Based	•				E
Total:	£47.00							
4							Ŧ	
				Back	Add	l item to the order		

Required Fields

- Price
- Quantity

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

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

🗐 New Item 🗙 Delete					
ID ID	Name	Quantity	List Price	Total	Discount
ELCB000SOVTFS6	Nextware iPhone Screen Protector 2-pk.	1	\$19.99	\$19.99	\$0.00
Page Size: 20 💌					(1 items) I

Completing the Rest of the Purchase Order Form

1. Enter a Billing and a Shipping Address.

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

Billing Address		Shipping Address	
Address:	Add new address	Address:	Add new address
Address: Name: First Name: Last Name: Line 1: Line 2: City:	Add new address	Address: Name: First Name: Last Name: Line 1: Line 2: City:	Add new address
Country Name:	United States	Country Name:	United States
State:	Alabama	State:	Alabama
Postal Code:		Postal Code:	
Day Phone:		Day Phone:	
Evening Phone:		Evening Phone:	
Email:		Email:	
	Add to customer's address book		Add to customer's address book

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

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

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

Shipment Details	
Shipping method: Fi	xed Shipping Rate
	Recalculate
Summary	
Item Subtotal:	\$19.99
Shipping Cost:	\$10.00
Less Shipment Discount:	\$0.00
Total Before Tax:	\$19.99
Item Taxes:	\$0.00
Shipment Total:	\$29.99

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

Creating an Order Within a Contact

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

2. Click on New Order.

Dashboard CMS Co Commerce Manager Setti	ommerce Add-ons			episerver (0 ?	💄 admin	Q
EPiserver CC	OMMERCE Info	rmation				Welcome,	admin
Welcome 🔻 Change Language 🛛 A	bout 🔻				🕜 Get H	Help For This Pag	je 🗢
Customer &	Edit X Delete Contact Con	tacts New Order	Order Parent Organizat	ion:			
Contacts	Information	Information					
a Roles	Information	- Contact					
Gift Cards	Credit Cards	Full Name:	admin	Customer Group:			
	Security	First Name:	admin	Preferred Currency:			
	Orders	Middle Name:		Preferred Language:			
	Order History	Last Name:		Registration Source:			
	Wish Lists	Parent Organization	n:	Last Order Date:			
	Shopping Carts	Preferred Shipping Address:					
		Preferred Billing Address:					=
		- Account	Edit	Account Change Passwo	rd Re	move Account -	
Dashboard		User Name:	admin	Is Locked Out:	none	2	
Customer Management		Description:		Last Activity:	Tod	ay , 1:23 PM	
Catalog Management		Email:	admin@yourcompany.com	Last Login:	Tod	ay , 12:49 PM	
Order Management				Last Password Changed:	Tod	ay , 6:19 AM	
Marketing							
Asset Management	Edit Cancel						
Reporting							
Administration							*

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

Processing Orders

Introduction

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

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

Submitting Payment and Releasing to Shipping

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

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

RCE Order						
Add Note 🗟 Send Notifications 📑 Add Ord	ler Address					
Order No: PO0850 Customer: Mary Smith Order Total: \$59.98 Status: InProgress						
Summary Details	Payments Returns Notes					
Create Payment						
Nam Nam	Transaction Type	Amount	Status			

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

The Order is in Edit Mode. Save changes before exiting. Save Cancel					
🔄 Add Note 🖻 Send Notifications 📑 Add Order Address					
Order No: PO2427 Customer: Mary Smith Order Total: £86.00 Status: InProgress					
Summary Details	Payments	R	eturns	Notes	
Image: Create Payment Image: Name	Transaction Type		Amount	Status	
Pay By Phone			86.00	Pending	
Page Size: 100 V					

Note: When in Edit Mode, you can add more payments to the order. However, once you click **Save**, you finalize the payment. This means that you cannot add or delete any further payments.
6. Once you have finished adding one or more payments, click **Save** to exit Edit Mode and save your changes. The payment gets automatically processed for the amount specified.

CE (Order						
🛛 Add Note 🗟 Sen	d Notifications 📑 Add Orde	er Address					
Order No: PO0850 Customer: Mary Smith							
O	der Total: \$59.98		Stati	us: InProgres	S		
Summary	Details	Payments	R	eturns	Notes		
Name		Transaction Type		Amount	Status		
Pay By P	hone	Sale		59.9800	Processed		
Page Size: 100 💌							

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

Summary	Details	Payments	Returns		Notes			
hipment # 1								
🗹 New Line Item	× Delete							
	D	Name	Quantity	List Price	Placed Price	Total Discount	Discount Description	Total
	B3017B	Chateau Bellevue	2.00	£43.00	£43.00	£0.00		£86.00
Page Size: 100	•							
- Shipping Infe	ormation							
Shipping Add	ess:							
1 First Street, Ho	metown, Alabama, 81818,	United States	Edit Shippi	ng Address]			
Shipping Meth	od:							
Free delivery (2-	3 days)	[Edit Shippi	ing Method]			
– Shipment Su	mmary	Shipm	ent Status -		C R	eturns/Exchang	es	
1	tem Subtotal: £86.00		Status: Aw	aiting Invento	ry	Create	Return	
S	hipping Cost: £0.00		Complete	Shipment				
Sh	ipment Total: £86.00		Release S	hipment				
			Cancel S	hipment	5-			
Promotions								
Type Nam	e	Coupon Code						

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

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

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

Splitting Shipments

Introduction

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

Splitting a Shipment for an Order

Do the following to split a shipment for an order:

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

🔄 Add Note 🗟 Send Notifications 📑 Add Order Address											
Order No: P00663 Order Total: £22600	Customer: Status:	Customer: John Browne Status: InProgress									
Summary Details	Payments	Returns		Notes	-						
Shipment # 1											
New Line Item											
ID I	Name	Quantity	List Price	Placed Price	Total Discount	Discount Description	Total				
🔲 🛃 74521B	Domaine de Montille	2.00	£69.00	£69.00	£0.00		£138.00				
🗖 🛃 74838B	4.00	£22.00	£22.00	£0.00		£88.00					
Page Size: 100 V											

- X Delete 🖃 New Line Item ID Name n 🔂 74521B Domain Maison 74838B Move Page Size: 100
- 3. Select the item you want to move by clicking on the Move icon.

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

Shipment # 1

changes.

Move Line I	tem	×
Guantity to r	nove: 4	
🔘 Move to e	existing shipment 🔍	
Oreate ne	ew shipment	
Address:	123 Sunset Avenue, Suntown, Marshall Islands, 765432, 💌 United States	
Shipping Method:	Free delivery (2-3 days)	
	✓ OK X Cancel	

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

The Order is in Edit Mode. Save changes before exiting. Save X Cancel										
🔄 Add Note 🛛 Send N	lotifications 📑 Add (Order Address								
Order	No: PO0663	Custom	er: John Brow	vne						
Order To	otal: £226.00	Stat	us: InProgres	is .						
Summary	Details	Payments	Return	ns	Notes					
Shipment # 1										
🗐 New Line Item	× Delete									
ID ID		Name		Quantity	List Price	Placed Price	Total Discount	Discount Description	Total	
7452	1B	Domaine de Montille		2.00	£69.00	£69.00	£0.00		£138.00	
Page Size: 100 🔻										
— Shipping Information	ation									
Shipping Address	:									
123 Sunset Avenue, S	Suntown, Marshall Islar	ids, 765432, United Stat	es					Edit Shipping Address		
Shipping Method:										
Erro delivery (2, 2 da								Edit Chipping Mathed	1	
Free delivery (2-3 da	y3)							East Shipping Method]	
- Shipment Summa	ary	Shipme	ent Status —			leturns/Exch	langes			
Item	Subtotal: £138.00	2	Status: Inven	ntory Assign	ed	Cr	eate Return			
Shipp	ing Cost: £0.00		Complete Sh	nipment				_		
Shipme	ent Total: £138.00		Release Shi	pment						
			Cancel Shi	nment						
			ouncer only	princine						

Shipment # 2											
New Line Item New Line Item	Name	Quantity	List Price	Placed Price	Total Discount	Discount Description	Total				
	Name	Quantity	LISTFILLE	Flaceu Flice	Total Discount	Discount Description	Total				
🔲 🛃 74838B	Maison Camille Giroud	4.00	£22.00	£22.00	£0.00		£88.00				
Page Size: 100 🔻											
Shipping Information											
Shipping Address:											
123 Sunset Avenue, Suntown, Marshall Island	123 Sunset Avenue, Suntown, Marshall Islands, 765432, United States Edit Shipping Address										
Shipping Method:											
Free delivery (2-3 days)						Edit Shipping Method					
C Shipment Summary ————————————————————————————————————	Shipment Status —		R	leturns/Exch	anges						
Item Subtotal: £88.00	Status: Inven	tory Assign	ed	Cr	eate Return						
Shipping Cost: £0.00	Complete Sh			C)	cute iterarii						
Shinment Total: £88.00	Complete Sr	lipment									
	Release Shi	pment									
	Cancel Ship	oment									

6. Click Save to save your changes.

Setting up Payment Plans

Introduction

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

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

Creating a Payment Plan

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

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

-Payment Plan Deta	ails
Plan Cycle (en-US):	No cycle Cycles mode is used to define period for recurring payments. Can be day, week, month, year or custom.
Cycle Length (en- US):	Cycle length in units of cycle mode.
Max Cycles (en-US):	Number of maximum cycles to process
Completed Cycles (en–US):	Number of completed cycles
Start Date (en-US):	2/23/2012 02:19 PM Plan start date
End Date (en-US):	2/23/2012 02:19 PM Plan end date
Is Plan Active (en- US):	True False Set to true if plan is active
Last Transaction Date (en-US):	2/23/2012 III 02:19 PM The date of last transaction

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

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

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

Payment Plan Order Detail Page Explained

The payment plan begins once the first purchase order is generated. The purchase order can be created manually (by clicking on Create First Purchase Order) or automatically by the payment plans quartz job. After creating a new payment plan, a new **Order** page appears. This is slightly altered from the original Order detail page that appears after creating a new order. The changes include:

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

Editing and Canceling a Payment Plan

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

Creating a Recurring Payment Plan Using Authorize.Net

Out of the box, EPiServer Commerce supports **Authorize.net** as a recurring payment plan gateway. For more information on how to setup payment methods, refer to the *Payment Gateways* section.

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

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

Class Name: Mediachase.Commerce.Plugins.Payment.Authorize.AuthorizePaymentGateway 💌

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

Overview	Parameters
Configure Au Get an Authoriz	thorize.Net Account e.Net account at www.authorizenet.com.
API UserId: Transaction Key	4y5BfuW7jm
Regular Paymo Processing Url	ents
Payment Optio	ns: Authorization
	Sale
Recurring Pay	ments
Processing Url	https://apitest.authorize.net/xml/v1/request.api
Recurring Met	nod: Internal 🔻
Cancel Status:	OnHold
ОК	Cancel

Editing, Canceling and Deleting Orders

Introduction

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



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

Editing an Order

Do the following to edit an order:

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

Notes.

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

Canceling an Order

Do the following to cancel an order:

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

Order No: PO0850						Customer: Mary Smith				
	Order Total: \$59.98						Status: Cancelled			
	Summary Details			ails	Payments		Returns	Notes		
	lew Item									
		Originated By Date/Time			Note Text					
	5	admir	ı	2/21/201	1 9:49:43 AM	New order placed by admin in ConsoleManager				
	6	admir	ı	2/21/201	1 10:01:16 AM	Ne	w Other payment in th	e amount of \$59.98 ad	ded to order	
	7	admir	n	2/21/201	1 10:08:10 AM	Sh	ipment 10 status chan	ges to Released		
	8	admir	ı	2/21/201	1 10:11:21 AM	Or	der status changed to	Cancelled		
•										
Pag	Page Size: 100									

Deleting an Order

Do the following to completely delete an order:

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

Shipping and Receiving

Introduction

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

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

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

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

Viewing Shipments

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

EPISERVER COMM	ERC	Е	Released S	hipments							
Welcome 🔻 Change Language About *											
Order Management 🍣	Wai	eho	use: Default Warehouse 💌								
😑 💘 Order Management	H R.,	Add !	Shipment to Picklist								
Q Order Search		-	Order Created	Last Modified	#						
🗄 🛅 Purchase Orders			order created	Last Mounicu							
🗄 🦳 Purchase Orders By Status) 2/18/2011 9:58:27 AM	2/18/2011 9:58:27 AM	PO1537-2						
🗄 🧰 Carts) Today , 11:46 AM	Today, 11:46 AM	PO0485-11						
🗄 🦳 Payment Plans (recurring)			~								
🚊 😋 Shipping/Receiving											
ာ Shipments ရက်											
Released for Shipping	111										
Pick Lists	111										
Returns											

Order Created

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

Last Modified

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

Number

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

Customer

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

Shipping Method

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

Address

The Address that the package is being shipped to.

Warehouse

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

Viewing Received Items

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

Creating Picklists

Introduction

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



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

Creating Picklists and Adding Shipments

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

EPISERVER COMME	RCE	Released S	hipments				
Welcome 🔻 Change Language About 🔻	Welcome 🔻 Change Language About 🔻						
Order Management 🍣	Warehouse: De	fault Warehouse 💌					
🖃 💘 Order Management	Radd Shipmer	nt to Picklist					
. Q Order Search	Orde	r Created	Last Modified	#			
🗄 🛅 Purchase Orders		rereated	Last Mounicu	<i>π</i>			
🗄 🧰 Purchase Orders By Status	2/18	/2011 9:58:27 AM	2/18/2011 9:58:27 AM	PO1537-2			
🕀 🧰 Carts	📃 📄 🕦 Toda	y , 11:46 AM	Today, 11:46 AM	PO0485-11			
🗄 🦳 Payment Plans (recurring)							
🔄 📇 Shipping/Receiving							
ခဲ့ 🚰 Shipments 🧄							
Released for Shipping							
Pick Lists							
Returns							

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

EPISERVER COMME	RCE Released SI	E Released Shipments				
Velcome 🔻 Change Language About 🎽						
Order Management 🏻 🍣	Warehouse: Default Warehouse 💌					
😑 💘 Order Management	R Add Shipment to Picklist					
Q Order Search	Order Created	Last Modified #				
🗄 🛅 Purchase Orders		"				
🗄 🚞 Purchase Orders By Status	2/18/2011 9:58:27 AM	2/18/2011 9:58:27 AM PO1537-2				
🗄 🧰 Carts	📝 👔 Today, 11:46 AM	Today, 11:46 AM PO0485-11				
🗄 🧰 Payment Plans (recurring)						
🗄 😋 Shipping/Receiving						
🖃 🎒 Shipments						
Released for Shipping						
Pick Lists						
🖧 Returns						

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

Add Shipmer	ts to Pick List	.0.0.1115	ISSANGE KRAUMA	SUCCE SHOULD FIT	×
© Create Ne	w Pick List				
List Name:	2011-06-16 16:36				
Add to Pi	ck List				
List Name:		•			
		✓ ОК	× Cancel		

5. Click OK to save your changes.

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

Completing Shipments

Introduction

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



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

Completing a Shipment

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

Method 1

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

		Pa	acking Shipments			
🔊 Co	mple	te	🖳 Print Picklist 🆺 Print Packing Sli	p 🗙 Remove from	n Picklist	
			Last Modified	#	Customer	Shipping Method
	0	Ż	6/16/2011 12:09:53 PM	PO4563-4	Carlos Nevada	Fixed Shipping Rate
	0	2	6/16/2011 12:14:41 PM	PO6908-6	Jennifer Browne	Fixed Shipping Rate
V	0	2	Today, 1:40 PM	PO10728-9	Lisa Prescott	Ground Shipping
	Co Co C C C	Complet Comple	Pá	Packing Shipments Complete Print Picklist Complete Print Picklist Last Modified O 6/16/2011 12:09:53 PM O 6/16/2011 12:14:41 PM O O O O Today, 1:40 PM	Packing Shipments Complete Print Picklist Print Packing Slip Remove from Last Modified # 6/16/2011 12:09:53 PM PO4563-4 6/16/2011 12:14:41 PM PO6908-6 6/16/2011 12:14:41 PM PO10728-9	Packing Shipments Complete Print Picklist Print Packing Slip Remove from Picklist Last Modified # Customer 6 6/16/2011 12:09:53 PM PO4563-4 Carlos Nevada 6 6/16/2011 12:14:41 PM PO6908-6 Jennifer Browne 7 6 7 Today, 1:40 PM PO10728-9 Lisa Prescott

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

	Packing Shipm	ients			
nple	ete 🔄 Print Picklist 🚺	Print Packing Slip	Remov	ve from Picklist	
	Last Modified		#	Customer	Shipping Method
0	6/16/2011 12:09:5	Complete ship	ment		
0	6/16/2011 12:14:4				
0	資 Today, 1:40 PM	Shipment #:	9		Validate
				✓	OK. X Cancel

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

Complete shipr	nent	×
Shipment #:	9 Validate	
Customer:	Lisa Prescott	
Shipping Addres	s: 111 Palm Street, Sun City, Florida, 333445, United States	
Shipping Method	I: Ground Shipping	
Tracking Numbe	r: 1234567	
	V OK X Cancel	

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

Method 2

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

Packing Shipments						
Comple	🖉 Complete 🖶 Print Picklist 🎬 Print Packing Slip 🗙 Remove from Picklist					
	Last Modified	#	Customer	Shipping Method		
	資 6/16/2011 12:09:53 PM	PO4563-4	Carlos Nevada	Fixed Shipping Rate		
	6/16/2011 12:14:41 PM	PO6908-6	Jennifer Browne	Fixed Shipping Rate		
	$\mathbf{\nabla}$					

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

Complete shipm	lent	×
Shipment #:	6	
Customer:	Jennifer Browne	
Shipping Address	s: 75 Sun Street, Sunshine Valley, South Wales, 333567, Australia	
Shipping Method:	Fixed Shipping Rate	
Tracking Number	1234566	
	✓ OK X Cancel	

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

Printing Picklists and Printing Packing Slips

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



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

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

	F1 ▷ ▷ 100%	Select a format 🔻 Ex	port 🚑
Shipment Id:	6		
Customer Name	Product Code	Product Name	Qty
Mary Smith	83017B	Chateau Bellevue	2.00
Shipment Id:	9		
Customer Name	Product Code	Product Name	Qty
	715010	B : 1 M 31	

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

Removing Items and Deleting Picklists

Introduction

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

Removing Items from Picklists

Do the following to remove an item from a picklist:

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

Deleting Picklists

Do the following to delete a picklist:

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



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

Shopping Carts

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

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

Creating Shopping Carts

Introduction

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

Functions in the Cart View

The carts view has the following functions and information:

New Order

Allows you to create a new order from here. Creating a new order means that this will not produce a cart to view and will not show up in this view screen. It will appear under **Purchase Orders**. Only use this button on this screen if you actually wish to create a new order from here.

- New Payment Plan Allows you to create payment plans which will appear under "Payment Plans (recurring).
- New Shopping Cart

Creates a new cart assigned to a customer.

• Delete Selected

Allows you to delete carts.

• ID

Each cart has an individual ID which can be viewed from here by clicking the numbers.

Creating a Shopping Cart

Do the following to create a shopping cart manually:

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



Converting Shopping Carts

Introduction

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

Converting a Shopping Cart to a Purchase Order

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



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

Cart View			
🖉 More Actions 🕶			
- Overview			
Edit Information			
Cart #: 14			
Created Date: 6/23/2011 1:27:46 PM			
Cart Total: 418.99			
Currency: USD			
Customer: Carlos			
Customer ID: f3ed5de8-5f95-43f6-a6d2-e4348cca9d2e Open Customer Profile			
Email Address: carlos@somemail.com			
Line Items Notes			
D Name	Quantity	List Price	Total
ELCB000WM2VAI6	1.00	\$19.99	\$19.99
ELCB000JNYWBG6	1.00	\$399.00	\$399.00
Page Size: 100 💌			

An anonymous user Cart View will look like this:

Cart View	,					
Modh Actions -						
- Overview						
	Ec	lit Information				
Cart #:	3					
Created Date:	6/16/2011 10:07	01 AM				
Cart Total:	0.00					
Currency	USD					
Customer	Anonymous					
Email Address:						
Line Items	Notes					
ID ID	Name			Quantity	List Price	Total
ELCB000TGQHAW6				1.00	\$9.99	\$9.99
Page Size: 100 💌						

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

Cart View	
More Actions -	
Convert to Purchase Ord	
Create Payment Plan	
Created Date: 6/23/2011 1:27:46 PM	
Cart Total: 418.99	
Currency: USD	
Customer: Carlos	
Customer ID: f3ed5de8-5f95-43f6-a6d2-e4348cca9d2e	Open Customer Profile
Email Address: carlos@somemail.com	

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

Returns and Exchanges

Introduction

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

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



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

Initiating a Return

Do the following to initiate a return:

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

- Shipment Summary	- Shipment Status	Returns/Exchanges
Item Subtotal: £86.00	Status: Shipped	Create Return
Shipping Cost: £0.00	Complete Shipment	
Shipment Total: £86.00	Release Shipment	
	Cancel Shipment	

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

eate/Edit Return							
C Delete							
ID	Name		Quantity	List Price	Total	Reason	
83017B		Chateau Bellevue	2.00	£43.00	£86.00	Faulty	
age Size: 20 🔻						(1 item	s) Page ∢ 1 ⊧
otal Information			-Ad	ditional Info	mation		
Sub Total:	86.00			Comments	Strange tas	te in batch 12345.	*
Tax Total:	0.00						Ŧ
Shipping Total:	0.00						
Handling Total:	86.00						
Discount Total:	0						
Total Return Amount:	86.00						
						🗸 ОК	X Cancel

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

M	ERCE	Order List			
1	New Order 🔛 N	lew Payment Plan $ imes$ Delete Selected			
	ID	Customer	Total	Status	Last Modified
	PO0663	John Browne	£226.00	Partially Shipped	Today, 11:34 AM
	PO10564	Carlos Santana	£1,290.00	In Progress	Today, 11:30 AM
	PO0791	Carlos Santana	\$180.85	In Progress	Today, 10:27 AM
	PO2427	Mary Smith	£86.00	Completed (Awaiting Return Completion)	Today, 10:23 AM

Return Completing Actions

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

ERCE	Order					Welco	me, admin
							🕜 Get Help For This Page
Add Note 🗟 Send	Notifications 📑 Add C	Order Address					
Order I Order To	No: PO2427 tal: £86.00	Customer: M Status: C	ary Smith ompleted				
Summary	Details	Payments	Returns	Notes			
turn # RMA8980							
Date/Time Initiat Created Stat ReturnTo	ed: Today, 12:50 PM By: admin us: Awaiting Stock Retu tal: £86.00	Notes: Strange taste ir urn	1 batch 12345.	Ack	Edit Retur Cancel Retu Complete Retur	n urn turn eipt Items	Exchange Actions View Exchange Create Exchange
ID	Name			Quantity	List Price	Total	Reason
020170	Chateau Rellevi	Je		2.00	43.00	86.0000	Faulty

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

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

Returns actions	Ex
Edit Return	
Cancel Return	
Complete Return	
Acknowledge Receipt Items	

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

Create Refund		×	0
Amount:	86.0000		
Existing Payments	Pay By Phone (Sale) - £86.00		
	New Credit		
Payment Method:	Pay By Phone 💌		
		✓ OK X Cancel	

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

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

- b. If the customer wants the refund processed and deposited to a different credit card or payment method (such as cash, money order, or electronic transfer), click on the **New Credit** radio button and you can enter their alternate credit card information or other refund payment information.
- 4. Once done, click **OK** to create and process the refund. The status of the purchase order changes to **Completed**.

Order N	o: PO2427	Customer: N	lary Smith				
Order Tota	al : £86.00	Status: C	ompleted				
Summary	Details	Payments	Returns	Notes			
Return # RMA8980							
Date/Time Initia	ated: Today, 12:50 P	M Notes:		Retur	ns Actions		- Exchange Actions -
Created	d By: admin atus: Complete	Imin Strange taste in batch 12345. Edit Return View Exchange				View Exchange	
ReturnT	otal: £86.00				Cancel Ret	eturn	Create Exchange
				Ack	nowledge.Rec	eipt Items	
ID	Name			Quantity	List Price	Total	Reason
83017B	Chateau Bellev	ue		2.00	43.00	86.0000	Faulty
Page Size:							

Initiating an Exchange Order

Do the following to initiate an exchange order:

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

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

New Lir	ne Item					×	<
	Find Advan	ced Search					<u> </u>
licture	Name	Catalog	Туре	Price	In Stock		
\bigcirc	Chandon de Briailles	France	Variation	£55.00	1000	^	
\bigcirc	Louis Jadot	France	Variation	£125.00	1000		dre
\bigcirc	Dujac Fils & Pere	France	Variation	£36.60	1000	-	E
\bigcirc	Domaine Sylvie Esmonin	France	Variation	£72.00	1000		
\bigcirc	Maison Joseph Drouhin	France	Variation	£165.00	1000		
Page S	ize: 20 🔻		(2779 item	s) Page 4 1	2345	+	25
			Cancel Co	nfigure Select	ed Entry		+

lew Line Item		×
Selected Entry: Do	maine Sylvie Esmonin	-
Display Price:	£72.00	Â.
Price:	72.00	
Quantity:	1	
	In Stock: 1000. Reserved: 0.	=
Discount:	enter descr here 0 Percentage Based 🔻	
	Discount description amount	-
Total:	£72.00	
•		

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

6. Click **OK** once done.

Viewing an Exchange

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

	Exchange actions
Irn	View Exchange
turn	Create Exchange
leturn	
Receipt	

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

MERCE Order			
The Order is in Edit Mode. Save changes	s before exiting.	✓ Save	Cancel
Order No: E00335 Order Total: £72.00 Status Summary Details	Carlos Santana AwaitingExchange Payments	Original Order: P	00791 Notes
Create Payment			
Name Name Pay By Phone	Transaction Type	72.00	Pending
Page Size: 100 V			

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

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

IME	ERCE	Order List			
N	lew Order 🔲 N	ew Payment Plan 🗙 Delete Selected			
	ID	Customer	Total	Status	Last Modified
	EO0335	Carlos Santana	£72.00	Awaiting Exchange	Today, 1:22 PM
	PO0663	John Browne	£226.00	Partially Shipped	Today, 11:34 AM
	PO10564	Carlos Santana	£1,290.00	In Progress	Today, 11:30 AM
	PO0791	Carlos Santana	\$180.85	Completed (Awaiting Stock Return)	Today, 10:27 AM
	PO2427	Mary Smith	£86.00	Completed	Today, 10:23 AM

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

Marketing

Introduction

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

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

The Marketing system consists of the following components:

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

Working With Marketing

The work with the marketing system includes the following tasks:

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

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

Promotions

Promotions provide a way to apply various discounts to products, order totals or shipping. A promotion is a marketing tool used to increase sales of certain products or product lines. Various incentives such as lowered pricing and other discounts can be employed as part of a promotion.

Promotions are always tied to *Campaigns*. In addition, promotions can be classified into two types: 1) either you can create a promotion that is visible **prior to checkout** or 2) you can configure the promotion to be displayed **during the checkout**.

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

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

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

You can also build your own custom promotions.

Browsing Promotions

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



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

IMERCE	Promotion List			
, 🗋 New Promotion 💈	More Actions 🔻			
Name		Group	Priority	Starts
Exclusive Glasses	25%	entry	1	Today, 2:41 PM

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

1ERCE Promot	tion Edit
Overview	
Promotion Type:	Catalog Entry: Build Your Own Discount
Promotion Name:	Exclusive Glasses 25%
	enter promotion name
Display Name:	
English (United States)	Exclusive Glasses
German (Germany)	
Spanish (Spain)	
French (France)	
Promotion Properties:	
Campaign:	Graduation Special
Promotion Group:	Catalog Entry
Combination with other promotions:	Combine with other promotions 🔻
	select the degree to which multiple promotions can be combined
Priority:	1
	promotions with higher priority will be evaluated first
Coupon Code:	
	will require code if entered
Status:	Active 🔻
	status of the promotion

Creating an Entry Level Promotion

Introduction

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

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

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

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

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

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

MERCE	Promotion Edit
Overview	
Promotion Type:	Catalog Entry: Build Your Own Discount
Promotion Name:	40% Off Wine Decanter
	enter promotion name
Display Name:	
English (United States)	40% Off Wine Decanter
German (Germany)	
Spanish (Spain)	
French (France)	

Promotion Properties:

- Under the Campaign drop-down, select an existing Campaign created earlier
- **Promotion Group** is grayed out because the Promotion Type is specified
- From the Combination with other promotions drop-down, select the degree to which multiple promotions can be combined. There are three options: "Combine with other promotions", "Exclusive within select groups", and "Exclusive within all groups."
 - Combine with other Promotions The selected promotion will be combined with all other promotion types that may be in use
 - Exclusive within Selected Groups If the selected promotion is applied, no other promotions within that group will be applied (but other promotions in other groups may be applied)
 - Exclusive within all Groups If the selected promotion is applied, no other promotions will be applied.
- Enter a numerical value into the **Priority** field (promotions with a higher priority will be evaluated first)
- Optionally, enter in a **Coupon Code** that customers can redeem from the front-end public site to get receive the discount. Otherwise, leave the field blank.
- Set the **Status** of the Promotion either as "Active", "Inactive," "Suspended," or "Deleted" from the drop-down menu. Select Active to enable the promotion.

Promotion Properties:			
Campaign:	Graduation Special 💌		
Promotion Group:	Catalog Entry		
Combination with other promotions:	Combine with other promotions 🔹		
	select the degree to which multiple promotions can be combined		
Priority:	1		
	promotions with higher priority will be evaluated first		
Coupon Code:	Test		
	will require code if entered		
Status:	Active 💌		
	status of the promotion		

Purchase Condition and Reward:

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

Purchase Condition and Reward:

```
This type of promotion allows you to create your own custom promotion.
```

Use the condition below to restrict how the promotion will be applied. Purchase Condition:

 And			
···· 😢	TargetLineltem.CatalogEntryld	Equals (Text)	F00146
😮			

Use the actions below to assign rewards.

Rewards: And @ get % off item reward 40.00%

Redemption Limits:

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

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

Redemption Limits:		
Max. Total Redemptions:	300	(Redeemed:)
	number of times the p	romotion can be used by all customers, enter 0 for unlimited
Max. Redemptions Per Order:	1	
	number of times the p	romotion can be used in a single order, enter 0 for unlimited
Max. Redemptions Per Customer:	1	
	number of times the p	romotion can be used by a single customer, enter 0 for unlimited

Schedule:

Enter the date and time when the Promotion is **Available** and when it **Expires**. Click **OK** to save the promotion. The promotion will appear in the **Promotion List**.

MERCE	Promotio	n List				Welcome, ad
New Promotion	🔊 More Actions 🕇					0
Name		Group	Priority	Starts	Ends	Sta
40% Off Wine Dec	anten	entry	1	Today, 3:02 PM	3/23/2012 3:02:	00 PM ac
Exclusive Glasse	s 25%	entry	1	Today, 2:41 PM	3/23/2012 2:41:	00 PM ac

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

Buy catalog entry X, get catalog entry Y at a discount

The steps to create this discount are similar to creating a custom discount. The difference is the Purchase Condition and Reward.

- 1. Under the Select catalog entry X drop-down menu, select a specific catalog entry.
- 2. Under the Select catalog entry Y drop-down menu, select another specific catalog entry.
- 3. Enter a value for the **Quantity of "X" needed to qualify for the promotion**. For example, the customer must purchase 2 of Catalog Entry X as a prerequisite for the discount.
- 4. Enter a value for the **Quantity of "Y" needed to quality for the promotion**. For example, the customer must purchase 3 of Catalog Entry Y as a prerequisite for the discount.
- 5. In the Amount field, enter in a number and select from the drop-down to indicate that the Promotion is **Percentage Based or Value Based**. For example, if you enter 40 and select Percentage Based, the Promotion will take off 40%. If Value based, it will be 40 off the total price.

Purchase Condition and Reward:		
This type of promotion makes additional SKUs av amount of the specified SKU	ailable at a percentage discount when an order i	ncludes some required
Select catalog entry X:	Enoteca Wine Glass Large [35368]	•
Select catalog entry Y:	Enoteca Decanter 1000ml [F00146]	•
Quantity of 'X' needed to qualify for the promotion:	4	
Quantity of 'Y' needed to qualify for the promotion:	1	
Amount:	25 Percentage Based ▼	

Buy X Get \$ Off Discount

This type of promotion gives a discount per item by purchasing the minimum quantity specified under these Purchase Conditions.

- 1. Enter a Minimum quantity that the customer needs to purchase in order to receive the discount.
- 2. Enter the Amount of the Promotional discount, whether Percentage Based or Value Based.
- 3. Select any number of **Variations** from the drop-down menu and click on "add variation." Repeat to add more **Variations** to this Promotion. Click on the red **X** button next to the Variation to delete it.

Purchase Condition and Reward:

Minimum quantity:	2		
Amount:	20	Percentage Based 🔻	
Variations:	Chateau Haut-Batailley [81725M] (5) more		

This type of promotion gives \$ off discount per item for the minimum quantity.

Creating an Order Level Promotion

Introduction

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

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

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

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

Buy X, get N quantity of Y at a discount

This type of promotion allows a customer to be eligible to buy a designated number of items at a reduced price.

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

Purchase Condition and Reward:

This type of promotion	n is eligible to buy designated number of item at a reduced price.		
Entry X variation:	Chateau Guiraud [80758H] (2) more 🔲 Exclude		
Select catalog entry Y:	Domaine Sautereau [761518]		
Max quantity Y:	1		
Amount:	20 Percentage Based 🔻		

Order Sub Total Volume Discount

Enter in the **Minimum order amount** into the field. For example, if the order amount was set to \$200, then the customer must have \$200 or more in his shopping cart to qualify for the discount.

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

Purchase Condition and Reward:			
This type of promotion disc	ounts the order subtotal i	f minimum order amount is met.	
Minimum order amount:	0]	
Amount:	0	Percentage Based 💌	

Example: Build Your Own Discount - "20% Off for a Shopping Cart Subtotal of \$100 or More"

Like a custom Catalog Entry discount (add link here), users can create their own custom Order Level discount based on a list of **Purchase Conditions** and **Rewards**. This means that there is a wide range of Order Level discount possibilities.

The follow Condition and Reward example shows how to create a Promotion that gives 20% off for a shopping cart subtotal of \$100 or more.

Purchase Condition and Reward:

This type of promotion allows you to create your own custom promotion.

Use the condition below to restrict how the promotion will be applied. Purchase Condition:



Use the actions below to assign rewards. Rewards:

```
And

get % off whole order reward 20.00%
```

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

Creating a Shipping Level Promotion

Introduction

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

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

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

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

Example: Buy N quantity Get % Off Shipment Discount

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

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

Purchase Condition and Reward:

This type of promotion allows you to create your own custom promotion.

Use the condition below to restrict how the promotion will be applied. Purchase Condition:

```
And

Shipment.ShipmentTotal Equals 5.00
```

Use the actions below to assign rewards. Rewards:

--- And ---- 👩 get % off shipment reward 20.00%

Creating Custom Promotions

Introduction

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

How to Use "Or" When Building Your Own Promotions

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

Building the Discount

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

Purchase Condition and Reward:

This type of promotion allows you to create your own custom promotion.

Use the condition below to restrict how the promotion will be applied. Purchase Condition:

·	And				
	- 0	TargetLineltem	.DisplayNar	ne Contains	Bordeaux
	··· 😢	TargetLineltem	.DisplayNar	ne Contains	Sauternes
	🕞				
Use Rev	the ac vards:	tions below to a	ssign rewar	ds.	

Seeing the Discount Applied

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

Your B	asket - you have 5 item(s) in your basket					
	Barolo, Le Vigne, Az. Agr. Luciano Sandrone, Piedmont		Quantity 5	Price Tota £117.00 £585.0	I R(emove S
	Do you have a promo code?		Enter Code	Apply O		
		£0.00 discount awarded in this basket. 0 loyalty points recieved with this purchase.		Subtotal Order Discount Company Discount Total Order	£585.00 -£0.00 -£0.00 £585.00	(exc. Tax) (exc. Tax) (exc. Tax) (exc. Tax)
Back				Update Basket 🕥	Go to Che	eckout D

Editing, Activating and Deleting Promotions

Editing a Promotion

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

1ERCE Promot	ion Edit		
Overview			
Promotion Type:	Catalog Entry: Build Your Own Discount		
Promotion Name:	Exclusive Glasses 25%		
Display Name:	enter promotion name		
English (United States)	Exclusive Glasses		
German (Germany)			
Spanish (Spain)			
French (France)			
Promotion Properties:			
Campaign:	Graduation Special		
Promotion Group:	Catalog Entry		
Combination with other promotions:	Combine with other promotions 💌		
Priority:	select the degree to which multiple promotions can be combined		
Coupon Code:	will require code if entered		
Status:	Active status of the promotion		

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

Activating and Inactivating Promotions

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

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

RCE	Promotion List			
New Promotion	More Actions *			
Name	X Delete Selected	Priority	Starts	
Spring Offer	Flip Status (active/inactive)	1	Today, 11:24 AM	

Deleting a Promotion

I

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

MERCE Promotion Lis							
New Promotion	New Promotion View Actions						
Name	X Delete Selected		Group	Priority	Starts		
Exclusive Glass	Flip Status (active/inactive)	7	entry	1	Today, 2:41 PM		

Customer Segments

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

For example you can have a customer segment that targets all users from the Los Angeles area. You can create an expression that will include all the customers whose home city is Los Angeles. Thus, when a user registers on the site he or she immediately becomes part of the target customer segment.

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

Browsing Customer Segments

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



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

RC	E Customer Segment List	
N	ew Segment More Actions *	
	Los Angeles Area	
	New York Customers	

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

RCE	Segment Edit
Overview	
Segment Name:	Los Angeles Area
	enter segment name
Display Name:	Los Angeles Area
Description:	Customers in the greater Los Angeles area
	-
Members:	
	Exclude member
	add member
	X Mary Smith
	🗙 Company X
Conditions:	New Condition
	The above conditions will be evaluated in runtime and if any are true, the customer will be part of this segment.
ОК	Cancel

Creating Customer Segments

Introduction

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

Creating a Customer Segment Assigned to Contacts

Go to Marketing > Customer Segments.

Marketing 🍣				
- 2	Campaigns			
	Promotions			
	Customer Segments	0		
😟 🧰	Policies	Ċ		
•	Expressions			

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

1EF	RCE	Customer Segment Li	ist
I N	New Segment	More Actions *	
	Name 🖤		
	Graduation		
	Los Angeles Cu	stomers	

- 1. Enter a Segment Name, such as "Los Angeles Customers."
- 2. Enter in a **Display Name**, which will appear to users when associating this customer segment when *Creating a Marketing Campaign*.
- 3. Enter a **Description**.
- Select from a list of contacts from the Members drop-down to assign them to this customer segment. Select the name from the drop-down and then click add member. You can choose to Exclude member by clicking on the checkbox and then clicking add member.
- 5. Once done, click OK to save the customer segment.

1ERCE	Segment Edit
Overview	
Segment Name:	Los Angeles Customers
	enter segment name
Display Name:	Los Angeles Customers
Description:	Offers targeted to customers in the city of Los Angeles.
	-
Members:	•
	Exclude member
	add member
	Mary Smith
	X John Browne
Conditions:	New Condition
	The above conditions will be evaluated in runtime and if any are true, the customer will be part of this segment.
ОК	Cancel

Creating a Customer Segment With Conditions

Instead of assigning members manually to a customer segment, you can use **Conditions** to apply rules. If a customer satisfies the conditions, then the customer is part of the customer segment.

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

Setup the conditions based on the image below.

Condition Dialog							
Expression Name:	Company X or	Winearts Email					
Expression Xml:	And	Un name					
1	🔤 👩 Emai	Equals (Text)	Company X				
	🕜 Emai	Equals (Text)	Winearts				
-							

Click **OK** to save the Conditions.
Conditions:	New Condition
	🖬 🗙 Company X or Winearts Email
	The above conditions will be evaluated in runtime and if any are true, the customer will be part of this segment.
ОК	Cancel

Editing and Deleting Customer Segments

Editing a Customer Segment

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

RCE	Segment Edit
Overview	
Segment Name:	Los Angeles Area
	enter segment name
Display Name:	Los Angeles Area
Description:	Customers in the greater Los Angeles area
	v
Members:	Ψ
	Exclude member add member
	🗙 Mary Smith
	🗙 Company X
Conditions:	New Condition
	The above conditions will be evaluated in runtime and if any are true, the customer will be part of this segment.
ОК	Cancel

Update the information and click $\ensuremath{\textit{OK}}$ to save your changes.

Deleting a Customer Segment

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

RCE	Customer Segment List
🚨 New Segment	More Actions *
Name	X Delete Selected
Los Angeles Area	
New York Cus	tomers

Campaigns

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

Browsing Campaigns

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

Marketing 🍣		
	Campaigns	m
	Promotions	
	Customer Segments	
÷ 🗀	Policies	
± 🗀	Expressions	

From the Campaign List, you can view existing campaigns.

	RC	E Ca	mpaign List					Weld Prod Lice
1	N	lew Campaign 🆻	More Actions *					
		Name	Starts	Ends	Is Active	Last Modified	Created	
		Wine campaign	10/7/2008 2:00:00 AM	11/7/2020 1:00:00 AM	True		10/8/2008 12:14:13 A	м
		Spring Offer	5/1/2012 1:08:00 PM	6/30/2012 1:08:00 PM	True		Today, 1:09 PM	

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

MERCE	Campaign Edit		
Overview			
Campaign Name:	Graduation Special		
	enter campaign name	_	
Comments:	Special offers for the graduation occassion	*	
		-	
Available from:	2/23/2012 02:31 PM	4	
Expires on:	3/23/2012 02:31 PM	4	
Target Segments:	Graduation		
Active:	⑧ Yes ◎ No		
Archived:	🔘 Yes 🛛 🔘 No		
OK Cancel			

Creating Campaigns

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

MERCE		mpaign List	
New Camp	oaign 🖻 More Ad	ctions *	
Name	< P	Starts	End
Wine ca	mpaign	10/7/2008 2:00:00 AM	11/

- 2. This opens up the Campaign Edit page. Enter a Campaign Name, such as "Graduation Special."
- 3. Enter any **Comments** as notes about the Campaign.
- 4. Enter a date directly (or click on the **Calendar** icon to select a date) and time into the **Available From** field. This will indicate when the Campaign is expected to start.
- 5. Enter a date and time in the **Expires On** field.
- 6. Select the **Target Segments** from the list. Target segments are created under the *Customer Segments* section

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

MERCE	Carr	npaign Eo	lit		
Overview					
Campaign Name:	Graduation Sp	ecial			
	enter campaig	n name			
Comments:	Special offers fo	or the graduation	occas	sion	*
					Ŧ
Available from:	2/23/2012			02:31 PM	
Expires on:	3/23/2012			02:31 PM	
Target Segments:	Graduation				1
Active:	Yes ()) No			
Archived:	🔘 Yes 🛛 🔇	No No			
ОК С	ancel				

Editing and Deleting Campaigns

Editing a Campaign

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

MERCE	Campaign Edit	
Overview		
Campaign Name:	Graduation Special	
	enter campaign name	
Comments:	Special offers for the graduation occassion	*
		-
Available from:	2/23/2012 02:31 PM	
Expires on:	3/23/2012 02:31 PM	
Target Segments:	Graduation	
Active:	Yes No	
Archived:	🔘 Yes 🛛 💿 No	
ок с	ancel	

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

Deleting a Campaign

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

RCE	Campaign List	
New Campaign	More Actions 🔻	
Name	X Delete Selected	Starts
🔲 Wine campaig		10/7/2008 2:00:00 AM
Spring Offer		5/1/2012 1:08:00 PM

Expressions

Introduction

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

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



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

Creating an Expression

Do the following to create an expression:

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



1ERCE Expression List			Welcome, admin
			🕜 Get Help For This Pa
New Expression 🛛 🕏 More Actions 🔭			
Name Name	Description	Modified	Created
EntryCustomDiscount	{MarketingStrings:Promotion_Custom_Descrip	2/23/2012 2:42:50 PM	2/23/2012 2:42:50 PM
EntryCustomDiscount	{MarketingStrings:Promotion_Custom_Descrip	2/23/2012 3:13:48 PM	2/23/2012 3:13:48 PM
BuyXGetYDiscounted	{MarketingStrings:Promotion_Buy_X_Get_Y_A	I	2/23/2012 3:30:24 PM
BuyXGetNofYatReducedPrice	{MarketingStrings:Promotion_Buy_X_Get_N_A	I	2/23/2012 3:40:42 PM
BuyXGetOffDiscount {MarketingStrings:Promotion_Buy_X_Get_Doll			2/23/2012 3:47:33 PM
EntryCustomDiscount	{MarketingStrings:Promotion_Custom_Descrip	Today, 10:10 AM	Today, 10:07 AM

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

1	ERCE	Expression Edit
	Overview	
[Expression Name	
	Description:	enter expression name
		anter expression description
	Expression Xml:	
	Catagory	enter expression xml
	Category.	Promotion Promotion Promotion Protegory
	ок с	Segment a Policy

8. Click OK to save changes.

ERCE	Expression Edit Welcome, admin	_
	🕖 Get Help For This I	Page
Overview		
Expression Name:	EntryCustomDiscount	
	enter expression name	
Description:	{MarketingStrings:Promotion_Custom_Description}	*
		~
	enter expression description	
Expression Xml:	<ruleset <br="" chainingbehavior="None" description="{p1:Null}" name="PromotionCondition-0-CustomerRuleSet">xmlns:p1="http://schemas.microsoft.com/winfx/2006/xaml" xmlns="http://schemas.microsoft.com/winfx/2006/xaml/workflow"> & None" & None (State Set Set Set Set Set Set Set Set Set S</ruleset>	× E
	<rule active="True" description="{p1:Null}" name="0" priority="9999" reevaluationbehavior="Never"> <rule. thenactions=""></rule.></rule>	
	<rulestatementaction></rulestatementaction>	
	<rulestatementaction.codedomstatement></rulestatementaction.codedomstatement>	
	<pre></pre> <pre> <pre></pre> <pre></pre> <pre></pre> <pre></pre> <pre></pre> <pre></pre> <pre></pre> <pre></pre> <pre></pre> <pre> <p< td=""><td></td></p<></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre></pre>	
	<ns0:codeprimitiveexpression></ns0:codeprimitiveexpression>	
	<ns0:codeprimitiveexpression.value></ns0:codeprimitiveexpression.value>	
	<ns1:boolean< td=""><td></td></ns1:boolean<>	
	xmlns:ns1="clr-namespace:System;Assembly=mscorlib, Version=2.0.0.0, Culture=neutral, PublicKeyToken=b77a5c561934e089">true	
		-
	enter expression xml	
OK C	ancel	

Policies

Introduction

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

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

(i)

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

Creating a Policy

Do the following toe create a policy:

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

1ERCE	Policy List
New Policy	🖄 More Actions 🔻
Name	

- 2. Click on New Policy to open the Policy Edit page.
- 3. Enter a Policy Name.
- 4. Enter the Status of the policy.
- 5. Select "Yes" or "No" to set the policy Is Local.
 - a. **Policy Is Local is No** this is the default behavior. This means that this policy is not part of a promotion group and is available for all promotions.
 - b. **Policy Is Local is Yes** this means this policy is part of a promotion group and is applicable only for that promotion group.
- 6. Select an existing **Policy Expression** from the drop-down menu.
- 7. Select from the **Groups** list to place the policy under.
- 8. Click OK when done.

ERCE	Policy Edit
Overview	
Policy Name:	
Status:	enter Policy name
Is Local:	○ Yes
Expression:	select policy expression
Groups:	Order Catalog Entry Shipping
	select policy group, allows you to logically group policies
ОК	Cancel

Policy Status and **Policy Is Local** has not been fully implemented. Therefore, all policies will be global (meaning it cannot be limited to a promotion group) until this feature becomes available in a future release.

Assets

Introduction

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

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

Working With Assets

File and asset management includes the following tasks:

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

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

File Manager

Introduction

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

∓ ☆	
Blocks Catalog	s Files
Folders	Commerce Assets
🚞 Page Files	Path: Commerce Assets
Starting Points	
Global Files Documents	Show Search for files
Commerce Assets	Downloads
My Favorites	Images
Add favorite	Presentations
right-click menu	🛅 Software
for any of the folders on the	Specifications
right	User Guides
	🛅 Video
	🔁 Integrating with EPiServer EN.pdf
Drop files here to upload	

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

Searching for Files

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

Creating Folders

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

Uploading Files

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

Setting Access Rights for Folders

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



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

Renaming Files and Folders

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

Deleting Files and Folders

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

Editing Files

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



Asset Management

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

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

Browsing Assets

Introduction

The **Asset List** page categorizes and manages downloadable Asset files. The default list of Asset folders are: **Video**, **Presentations**, **Specifications**, **Software**, **Downloads**, **User Guides**, and **Images**. These folders can be edited or deleted and are simply placeholders for typical asset folders.

Browsing for Assets

Do the following to access existing assets in the system:

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

Asset Management		2
🖻 🔂 Root	վեռ	
🗀 Video	\Box	
Presentations		
Specifications		
📄 Software		
📄 Downloads		
🗀 User Guides		
🕀 🦲 Images		

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

1EF	RCE Asset Lis	t	
	. 78		
C	reate New 🔨 🗹 More Actions 🏲		
	Name	Size	Created
	🖅 🛄 Video		2/22/2012 4:03:05 AM
	🛒 🛄 Presentations		2/22/2012 4:03:05 AM
	🗐 📮 Specifications		2/22/2012 4:03:05 AM
	🛒 🛄 Software		2/22/2012 4:03:05 AM
	🛃 🧰 Downloads		2/22/2012 4:03:05 AM
	🛒 🛄 User Guides		2/22/2012 4:03:05 AM
	🛒 🦳 Images		2/22/2012 4:03:05 AM

Creating Folders

Creating an Asset Folder

Do the following to create a folder for storing assets:

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

2. Click on Create New > New Folder.



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

New Folder			×
Name	Audio	Create	

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

🗋 Create New 🔹 💆 More Actions 🔻				
		Name	Size	Created
	1	🗀 Video		5/11/2010 3:34:57 PM
	1	C Presentations		5/11/2010 3:34:57 PM
	2	Gpecifications		5/11/2010 3:34:57 PM
	1	Goftware		5/11/2010 3:34:57 PM
	1	🗀 d_nloads		5/11/2010 3:34:57 PM
	1	🗀 User Guides		5/11/2010 3:34:57 PM
	1	🗀 Images		5/11/2010 3:34:57 PM
	1	audio		Today, 3:15 PM

5. To see the folder in the left navigation frame, click on the **Refresh** icon and the new folder"Audio" will appear. You can create additional sub-folders underneath Audio (or any other existing folder).

Asset Management	<u>م</u>
🚊 😋 Root	
🚞 Video	
Presentations	
Specifications	
🗀 Software	
🚞 Downloads	
🚞 User Guides	
🕀 🧰 Images	
🗀 Audio	

Uploading Asset Files

Uploading Individual Files

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

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

1ER (CE	Asset List	
		b)	
Crea	ate New 🏹 📔 🗹	More Actions *	
_ 📸 N	ew Folder		
N	ew File	رسای	
U 🗋 🗌	pload Multiple	Files	
	🚽 🛄 Package	e01	
	🚽 🗀 Package	e02	
	🛃 🚞 Package	e03	
	🚽 🚞 Package	e04	
	🚽 🚞 Package	e05	
	🚽 🔤 LargeW	/ineGlassCrystal.jpg	

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

1ERCE	File Item	Welcome, admin
		🕡 Get Help For This Page 🗢
File Item		
Click Browse a	nd select file, or type file path:	
C:\Transfer\Sm	allWineGlass.jpg	Browse
Upload	, S	
ОК	Cancel	

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

1ERCE	File Item
File Item	
_ ImageFold	lerElement
Name:	SmallWineGlass.jpg
ОК	Cancel

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

1EF	٢C	E Asset List
C	reate	New 🔻 🛛 💆 More Actions 🔻
		Name
	-/	[]
	-1	Package00
	2	Package01
		Package02
		Package03
		Package04
	2	Package05
	2	🚾 LargeWineGlassCrystal.jpg
		🚾 SmallWineGlass.jpg

Uploading Multiple Files at One Time

Do the following to upload multiple files to the system:

1. Click on Create New > Upload Multiple Files.



2. The **Add Files** pop-up window appears. Click on **Browse** to add files. An additional field will appear below, allowing you to add more. You can upload up to five files at one time. One done adding files, click **Upload**.

Browse		
Browse		
Browse		

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

EPISERVER COMI	MERCE Asset List		Welcome, adr
Welcome 🎽 Change Language About 🎽			0
Asset Management 😂	Create New 🔨 🖄 More Actions 🍷		
🖻 😋 Root	Name	Size	Created
🔁 Video			
Presentations	MediumWineClass ing	12.04 KB	Today, 2:51 PM
- Specifications		14 22 KB	Today 2:51 PM
Software	SmallwineGlass.jpg	THEFRO	roddy, 2101 PM
Downloads			
🗄 🦳 Package00			
🗄 🦲 Package01			
🗄 🦲 Package02			
🗄 🧰 Package03			
🗄 🦲 Package04			
🗄 🦲 Package05			
Classes			

Editing and Deleting Folders and Assets

Editing Folder and Assets Names

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

C	🗋 Create New 🔻 📔 🌌 More Actions 🔻				
	Name				
	🛃 🗀 Video				
	🛃 🚞 Presentations				
	🛃 🚞 Specifications				
	🛃 🚞 Software				
	🛃 🚞 Downloads				
	🛃 🗀 User Guides				
	🛒 🗀 Images				

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

1ERCE	Folder Item
Folder Item	
Name Images	
OK Car	ncel

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

1ERCE	File Item
File Item	
	Flement
Name:	LargeWineGlassCrystal.jpg
OK Can	cel

Copying/Moving Folders and Assets

To copy or move an Asset or Folder to another location, place a check mark in the box next to the Folder or Asset name and then click on **More Actions > Move/Copy**.

1EF	RC	E	Asset List				
C	reate	New	More Actions *				
		Name	X Delete Selected				
	-1	[]	Move/Copy				
	-/	🗀 Pack	age00				
	-/	🗀 Pack	age01				
	-1	Deck	age02				
	-/	Deck	age03				
	-/	De Pack	age04				
	1	Deck	age05				
		🚾 Larg	eWineGlassCrystal.jpg				

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

Move/Copy to Folder						
⊚move or ⊚copy to folder: Root/Presentations ▼						
	OK Close					

Deleting a Folder or an Asset

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

1EF	RCE	Asset List				
C	reate New 🔻	More Actions 🕈				
	Name	X Delete Selected				
	_/ []	Move/Copy				
	🛃 🧰 Pack	age00				
	🛃 🚞 Pack	age01				
	🛃 🚞 Pack	age02				
	🛃 🚞 Pack	age03				
	🛃 🚞 Pack	age04				
	🛃 🚞 Pack	age05				
V	🛃 🚾 Larg	eWineGlassCrystal.jpg				

Reporting

Introduction

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

The default reports include:

- Sales Report an overview of the website sales performance over a period of time.
- Shipping Report the shipping method, number of orders and total shipping cost over a period of time.
- Best Sellers Report shows which products are sold the most in terms of quantity and total revenue over a period of time.
- Low Stock Report shows which products are running low in inventory. If a product's inventory is less than its reorder minimum quantity, it will be included in this report.

The *display of these reports can be filtered by date and time*, and the reports can be exported to Excel or PDF format, or printed.

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

Working With Reporting

The work with reports includes the following tasks:

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

About SQL Reporting Services

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

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

Generating and Exporting Reports

Introduction

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

Reporting	2				
🗄 🛄 Reporting					
🖃 📃 Sales					
Sales Report					
Shipping Report					
🖃 📃 Products					
Best Sellers Report					
Low Stock Report					

Generating a Report

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

MMERO	CE	Sales Report						
out 🔻								
Start Date: 5	/7/2010	12:48 P	M End Date: 6/7	/2010		12:48 PM Gr	oup By: Day 🔻	Apply Filter
14 4 1	of 1 👂	▶ 100%	 Select 	a format 🗖	Export	Ø 🎒		
Sales	Report (05/08/20	010 - 06	/07/20	010)			
<u>Period</u>	<u>Num. Of</u> <u>Orders</u>	Items Ordered	<u>Sub Total</u>	<u>Tax</u>	<u>Shipping</u>	Discounts	<u>Total</u>	Invoiced
05/08/2010		0 0	0	0	0	0	0	0
05/09/2010		0 0	0	0	0	0	0	0
05/10/2010		0 0	0	0	0	0	0	0
05/11/2010		0 0	0	0	0	0	0	0
05/12/2010		0 0	0	0	0	0	0	0
05/13/2010		0 0	0	0	0	0	0	0
05/14/2010		0 0	0	0	0	0	0	0

Filtering Report Data

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

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

MMER	CE	Sale	es Report						
out 🔻									
Start Date:	5/1/2010		06:00 AM	End Date: 6/7/2	2010		12:00 PM	Group By: Month 💌	Apply Filter
14 4	1 of 1 🕨		100%	 Select a 	format 💌	Export	2	3	
Sales	Report	(Ma	y, 2010	- June,	2010)				
<u>Period</u>	<u>Num. Of</u> <u>Orders</u>	Ite	ms Ordered	<u>Sub Total</u>	<u>Tax</u>	<u>Shipping</u>	Discounts	<u>Total</u>	Invoiced
May, 2010		0	0	0	0	0	C) 0	0
June, 2010		5	10	41,318.61	0.00 5	2.00	0.00	41,370.61	41,370.61
		5	10	41,318.61	0.00	52.00	0.00	41,370.61	41,370.61

Exporting a Report

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

Administration

Introduction

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

Working With Administration

The work with system administration includes the following tasks:

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

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

System Settings

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

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



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

Dictionaries

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

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

Adding Languages

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

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

Administration	2
🖻 🎹 Administration	
🖨 🔂 System Settings	
🖃 🔂 Dictionaries	
Languages	վեր
Countries	\Box
Return Reasons	
Currencies	

Click New Language and fill in the following:

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

MERCE	Language Edit
•	
Overview	
Code:	en-US
	Language code (for example, en-US)
Friendly Name:	English
Is Default:	🔘 Yes 🛛 💿 No
ОК	Cancel

Click OK to save the language.

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

Adding Countries

To add a new country, login to Commerce Manager and go to Administration > System Settings > Dictionaries > Countries.

Administration 🍣					
Administration					
🖃 😋 System Settings					
🗦 🔂 Dictionaries					
Languages					
Countries					
Return Reasons					
Currencies					

Click on **New Country** and fill in the following displayed in the **Overview** tab:

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

MERCE	Country Edit
•	
Overview	Regions
Country Name	:
Code:	
Sort Order:	0
Visible:	O Yes O No
ОК	Cancel

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

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

Overview Regions	5			
New Region Name	CA	Add		
Regions:				
Edit Command	Name		Ordering	Visible
	CA		0	
OK Cance	1			

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

R	Regions:					
	Edit Command	Name	Ordering	Visible		
	Update Cancel	CA	0	V		

Adding Currencies

To add a new Currency, login to Commerce Manager and go to Administration > System Settings > Dictionaries > Currencies.



Click on **New Currency**. Fill in the following displayed in the **Overview** tab:

- **Currency Name** this name is displayed in the front-end public site currency drop-down and various Commerce Manager administration pages.
- Code currency codes can be obtained from http://en.wikipedia.org/wiki/ISO_4217#Active_codes.

MERCE	Currency Edit	
•		
Overview Rates		
Currency Name:		
Code:		
Modified:		
OK Canc	el	

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

Overview Rates			
Add Rate			
Edit Command Currency Rate	Rate Date	Modified	
OK Cancel			

In the Edit Currency Rate Information dialog enter the following:

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

Click Save Changes.

Edit Currency Ra	ate Information	x
From Currency:	Australian dollar (AUD)	
To Currency:	Canadian dollar 💌	
End Of Day Rate:	0.0000	
Average Rate:	0.0000	
Currency Rate Date	E:5/25/2010 III 11:25 AM	
Modified:	5/25/2010 11:25:12 AM	
		Save Changes

Managing Return Reasons

Introduction

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

Administration 🔶				
Administration				
🖃 😋 System Settings				
🖨 🔂 Dictionaries				
Languages				
Countries				
Return Reasons	Jhn			
🖓 Currencies				

Creating a New Return Reason

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

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

Editing and Deleting a Return Reason

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

Logging

Introduction

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

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

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

System Log

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

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

EPISERVER COMMERCE System Log								
Welcome 🎽 Change Language About 🍷								
Administration 🍣	Filter Setting	s						
Carter Administration	Operation:							
🖃 🚍 System Settings	Object			Created	5/22/2012			
🙂 🦲 Dictionaries	Type:			Before:	11:45 AM		Apply Filter	
🗆 😋 Logs	🐴 Export Log	🕏 More Actions 🕈						
System Log	Operation	Object Key	Object Type	:		User Name	Created	Notes
 Application Log Common Settings 	LOGIN	login.aspx	Commerce	Manager		admin	Today, 11:14 AM	
Business Foundation	LOGIN	login.aspx	Commerce	Manager		admin	Today, 10:18 AM	
Workflow Search Index	ERROR	HandleException	Mediachase	.Cms.CmsHttpM	Iodule		Yesterday, 4:18 PM	Front en Mediach has exp
Left Menu Catalog System	ERROR	HandleAdminExceptio	r Mediachase	.Cms.CmsHttpM	Iodule	admin	Yesterday, 3:34 PM	Backend Mediach key was
🗄 🛄 Order System	LOGIN	login.aspx	Commerce	Manager		admin	Yesterday, 2:04 PM	

Application Log

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

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

EPISERVER COMM	1ERCE	Applicat	ion Log						
icome * Change Language About *									
Administration 👌	Filter Settings								
Administration System Settings	Source Type: Operation:			Object Type: Created Before:	5/22/2012	11:46 AM	Apply Filter		
Constant Con	Export Log 🖉 Mor	re Actions *	Object Key	Object Type			Liser Name	Created	
Application Log Common Settings	catalog	Modified	2769	entry			admin	5/14/201 3:31:04	
 Business Foundation Workflow 	catalog	Modified	2769	entry			admin	5/14/201 3:31:04	
Search Index	catalog	Modified	2769	entry			admin	5/14/201 3:31:02	
Eft Menu	catalog	Modified	2781	entry			admin	4/26/201 2:54:52	
B Catalog System	catalog	Modified	2781	entry			admin	4/26/201 2:54:52	

Configuring Common Settings

Introduction

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

Defining Languages, Currencies and Length/Weight Units

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



Out of the box, you have the following options:

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

MERCE	Common Settings
•	
Overview	
Default Language:	English (United States) Language that will be selected by default in drowdowns, etc.
Default Currency:	US dollar Currency that will be used is cases where currency is needed but not specified
Default Length Unit:	Feet Default unit of length
Default Weight Unit:	Pounds Pounds Default unit of weight
OK Cano	cel

Click OK to save your changes.

Business Foundation

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

EPISERVER COM	iSERVER COMMERCE Configuration			
Welcome * Change Language About *				🕜 Get Help For This Page
Administration	Create New -			
Administration G System Settings	Show: All	•		
🕀 🦲 Dictionaries	System Name	Friendly Name	Plural Name	Туре
🗉 🧰 Logs	💱 Address	Address	Addresses	Info
Common Settings	🔮 Contact	Contact	Contact	Info
Business Foundation	🔮 CreditCard	Credit Card	Credit Cards	Info
 Workflow 	🔧 CustomizationItem	Customization Item	Customization Item	Info
Search Index	dis CustomizationItemArgument	Customization Item Argument	Customization Item Arguments	Info
 Left Menu 	😤 CustomPage	Custom Page	Custom Pages	Info
🗷 🧰 Catalog System	😤 Folder	Folder	Folder	Info
🗄 🦲 Order System	St FolderElement	Folder Element	Folder Element	Info
	Ag GiftCard	Gift Card	Gift Cards	info 📑 🗙
	ImageFolderElement	ImageFolderElement	ImageFolderElement	Card
	🛠 Organization	Organization	Organization	Info
	PdfFolderElement	PdfFolderElement	PdfFolderElement	Card
	State RecentReferenceHistory	User Recent Reference	User Recent References	Info

The form is fully customizable so you can define layout and specify which fields you want to display. You can also work with system fields. Common examples of how users leverage Business Foundation are setting a standard height and width for an image file uploaded to the Asset Management system, or creating a "Gift Card" field within the Customer Management system used to track how much a customer has left on their gift card.



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

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

Creating Business Objects

Introduction

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

Creating a Contract Object

Do the following to add a contract business object:

1. Go to Administration, expand System Settings, and click on Business Foundation to access the Business Foundation Configuration page.

2. Click Create New and select New Business Object. The New Business Object dialog appears.

MMERCE	Configuration			Welcome, admin	
ut 🔻				🕜 Get Hel	Ip For This Page 🔶
New Business Obje	ct				Back To List
Base Info System Name: Friendly Name: Plural Name:	Contract Contract Name Contract Supports Extensions	 &	Field Info System Name: Friendly Name: Maximum Length:	Contract Contract Name 100	##
				✓ Save	🗙 Cancel

Enter information as described below.

Base Info

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

- Plural Name: plural version of the system/friendly name for example inventories.
- **Supports Extensions**: this allows you to extend an existing meta class with extra properties. For example, you can have a download class and you can extend it with "imagedownload" which contains width and height as extra parameters.

Field Info

- System Name: enter a system name.
- Friendly Name: enter a friendly, front-end name.
- Maximum Length: maximum number of characters allowed in this field.

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

Business Object Cust	omization	🚈 New Fiel	d 📷 Edit 🎒 Publish 芛 Back To List
System Name:	🔩 Contract	Friendly Name:	Contract Name
Туре:	Business Object (Public)	Plural Name:	Contract
Fields 1:N Relation	s N:1 Relations N:N Relations	Forms System Views	
System Name	Friendly Name	1	Туре
🗟 Vontract	Contract Nam	e	Text
🗟 Contractid	Id		Guid

Next Steps

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

Customizing Business Objects

Introduction

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

Editing and Deleting Business Objects

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

1ERCE Configuration	Welcom	e, admin				
			🕜 Get Help Fo	r This	Page	e 🗢
Create New 🔻 🛛 🎒 Export/Import 🔻						
Show: Business Object	•					
System Name	Friendly Name	Plural Name	T	уре		
🔮 Address	Address	Addresses	In	fo		
🔮 Contact	Contact	Contact	In	fo		
🔮 CreditCard	Credit Card	Credit Cards	In	ifo		
🔮 CustomizationItem	Customization Item	Customization Item	In	ıfo		
🔮 CustomizationItemArgument	Customization Item Argument	Customization Item Argument	s In	ıfo		
🔮 CustomPage	Custom Page	Custom Pages	In	ifo		
会; Folder	Folder	Folder	In	ifo		
🔮 FolderElement	Folder Element	Folder Element	In	ıfo		
As CiftCard	Gift Card	Gift Cards	In	fo	1	\times
े अyCard	MyCard	MyCard	In	ifo	1	\times
As NewCard	NewCard	NewCards	In	ıfo	1	\times
discontraction description and the second description descripti description description de	Organization	Organization	In	ıfo		
State RecentReferenceHistory	User Recent Reference	User Recent References	In	ıfo		

Editing and Deleting Fields of Business Objects

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

₫ [♥] CreditCardNumber	Card Number	Text	
- CustomerServicePhoneNumber	Customer Service Phone Number	Text	🛒 🗙
age ExpirationMonth	Expiration Month	Integer	Edit
ã [©] ExpirationYear	Expiration Year	Integer	

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

Edit Field			Back
Business Object:	Credit Card	Field Type:	String
Field Name:	CustomerServicePhoneNumber	Format:	Text
Friendly Name:	Customer Service Phone Number	Maximum Length:	100
Description:	Phone # found on back of card		Unique value
	☑ Allow Nulls		Save Cancel

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

Adding Fields to Business Objects

Introduction

Existing Business Foundation objects can be customized to have additional data entry fields. For example, you can add fields to the **New Credit Card** form built into Commerce Manager.

Adding Fields to a Business Object

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

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

IERCE Configur	ation	Welcome, admin		
g			😧 Get Help For This Page 🌻	
Create New 🔹 🛛 🏂 Export/Import 🔹				
Show: All	•			
System Name	Friendly Name	Plural Name	Туре	
🔮 Address	Address	Address	Info	
🔮 Contact	Contact	Contact	Info	
🔮 CreditCard	Credit Card	CreditCard	Info	
🔮 CustomizationItem	Customization Item	Customization Items	Info	
🔮 CustomizationItemArgument	Customization Item Argument	Customization Item Arguments	Info	
🔮 CustomPage	Custom Page	Custom Pages	Info	
🔮 Folder	Folder	Folder	Info	
🔮 FolderElement	FolderElement	FolderElement	Info	
🔩 GiftCard	Gift Card	Gift Cards	Info 📑 🗙	
ImageFolderElement	ImageFolderElement	ImageFolderElement	Card	
🔮 Organization	Organization	Organization	Info	
PdfFolderElement	PdfFolderElement	PdfFolderElement	Card	
😤 RecentReferenceHistory	User Recent Reference	User Recent References	Info	

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

Business Object Custo	omization			🊈 Ne	w Field	📝 Edit 🎒 Publish 🔁 Back To List
System Name:	鎍 CreditCard		Friend	ly Name:	3	Credit Card
Type:	Business Object		Plural	Name:		CreditCard
Fields 1:N Relation	s N:1 Relations	N:N Relations	Forms	System View	s	
System Name		Friendly Name				Туре
💱 Address		Address				Text (ReferencedField)
Jacob AddressId		Address				Reference
₫ [©] CardType		Туре				CreditCardType
lontact		Contact				Text (ReferencedField)
S Contactid		Contact				Reference
³ ♦ Created		Created				DateTime
^ã ♥ Creatorld		Creator				Guid
ड [°] ♦ CreditCardId		ld				Guid
ु® CreditCardNumber		Card Number				Text
🚽 ExpirationMonth		Expiration Mon	nth			Integer
Sector ExpirationYear		Expiration Yea	r			Integer
å LastFourDigits		Last Four Digit	s			Text
^ã ♥ Modified		Modified				DateTime
a ∰ ModifierId		Modifier				Guid
Organization		Organization				Text (ReferencedField)
🚰 OrganizationId		Organization				Reference
SecurityCode		Security Code				Text

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

New Field							🔁 Back
Business Object:	Credit Card			Field Type:	String		•
Field Name:	CustomerServicePhoneNumber			Format:	Text		•
Friendly Name:	CustomerServicePhoneNumber	6	8	Maximum Length:	100		
Description:		*			Unique value		
		-					
	Allow Nulls				✓ Save	🗙 Cancel]
Add Field To:	Edit Form						
	View Form						
	🗵 Short Info Form						

Enter a **Field Name**, which is the system ID or name of the field. The Field Name that is entered auto-populates the Friendly Name field.

Since the **Friendly Name** is auto-populated based on the Field Name, you can either keep the name the same or change it. The Friendly Name is what appears on a form (such as the Credit Card form).

You can optionally enter in a **Description** that appears below the data entry field to explain the field to the user.

Checkmark on or off to Allow Nulls for this field.

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

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

The Format drop down menu and options depend on your Field Type selection. In this example,

Text is selected as the field format, with a **Maximum Length** of 100. **Unique** value is left unchecked.

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

්ම CreditCardId	ld	Guid	
ã♥ CreditCardNumber	Card Number	Text	
CustomerServicePhoneNumber	Customer Service Phone Number	Text	X
ã♥ ExpirationMonth	Expiration Month	Integer	

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

View				
Edit X Delete Contact	Contacts New Or	der		×
Information	Overview	Visa 🗖 🏹		
Addresses Credit Cards Security	Last Four Digits:		Expiration Month:	[No value]
Roles Orders Order History	Card Number: Security Code:		Expiration Year:	[No value]
Shopping Lists Wish Lists Shopping Carts	Customer Service Phone Number:			
			~	OK X Cancel
Edit Cancel				

Customizing Forms

Introduction

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

New Credit Card			\mathbf{x}
- Overview			
Туре:	Visa 💌 🚰		
Last Four Digits:		Expiration Month:	[No value]
Card Number:		Expiration Year:	[No value]
Security Code:			
Customer Service Phone Number:			
			OK 🔁 Cancel

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

Editing Forms

By editing the form, you can change the layout, add new fields and sections, and more.

To edit an existing form, click on a **Business Object** and click on the **Forms** tab to see the list of associated forms.

Business Object Customization						篭 New Field 📝 Edit 🎒 Publis	h 🄁 Back To List
System Name: 🎊 CreditCard				Friendly Name:	Credit Card		
Type:	Bu	siness Object			Plural Name:	CreditCard	
Fields	1:N Relations	N:1 Relations	N:N Relations	Forms	System Views		
Name							
Edit Form							🛒 🍤
Short Info Form							
View Form							1

Click on the **Edit** icon next to the form you want to make changes to. The form customization window pops up.

ommon Tasks				🊈 Recreate Form 📔 🚰 Edit Form 📗 Save
Table:	Credit Card	Form:	Edit Form	
ldd 🔹 🛉 🏠 🦊	🗢 🔿 🔤 Edit 🛛 🗙 Remove			
- Overview				
Туре:				
Last Four Digits:			Expiration Month:	
Card Number:			Expiration Year:	
Security Code:				
Customer Servic Phone Number:	e			

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

Editing the Layout

You can change the layout and the fields that appear on the form.

1. Click on Edit Form.

a. Select a **View Type** (or the layout of the form). You have a choice between a Two Column (1:1, 1:2, 2:1), or Three Column (1:1:1) layout.

b. Enter in a pixel value for the Cell Padding, or spaces between each cell.

2. Click Save to confirm your changes.

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

Common Tasks	1 Re	create Form 📑 Edit Form 🔚 Save
Table: Credit Card	🏉 eCommerceFramework - Windows Intern 🗖 🗖 🔀	<u>40</u>
Add ▼ 🏠 🦆 🖨 🖨 📝 B	http://ecf.episerver.com/Apps/MetaDataBase/MetaUI/Pages/	
- Overview	Edit Form You can edit form.	
Type:		
Last Four Digits:	Table: Credit Card	
Card Number:	Form: Edit Form	
Customer Service	View Type:	
	Two Columns (1:1)	
	Two Columns (1:2)	
	Two Columns (2:1)	
	Three Columns (1:1:1)	
	Cell Padding: 5	
	Save Cancel	
	Internet Protected Mode: On	

Adding Sections and Fields

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

- 1. Click on Add --> Add Section to add a new section. Adding sections allows you to separate and divide groups of fields on a form with their own header and border.
- 2. Enter in a **Title** for the section.
- 3. Checkmark the box next to "Show border line for this section" if you want to show the border around section. Otherwise, uncheck the box to hide the border.
- 4. Checkmark "Show the name of this section on the form" if you want to show the title of the section on the form. Otherwise, uncheck the box to hide the title.
- 5. Select a **View Type** or layout of the section: One Column, Two Columns (1:1), Two Columns (1:2), Two Columns (2:1)
- 6. Enter a numeric pixel value for Cell Padding or amount of space between each cell in the section.
- 7. Click Save to save your changes.
| Common Tasks | Ta Recreate Form | 🛛 🚰 Edit Form 🛛 🔚 Save 🔻 |
|------------------------------------|--|--------------------------|
| Table: Credit Card | 🦉 eCommerceFramework - Windows Intern 🗖 🔲 🗙 | |
| Add 🔻 🏠 🦆 🖨 🔿 📝 Edit 🗙 Remov | http://ecf.episerver.com/Apps/MetaDataBase/MetaUI/Pages/ | |
| Add Section | Add Section
Add a new section to the form. | |
| Last Four Digits: | Title: Credit Card 2 | |
| Card Number: | | |
| Security Code: | Show border line for this section. | |
| Customer Service
Phone Number: | $\boxed{\ensuremath{\mathbb{V}}}$ Show the name of this section on the form. | |
| | View Type: | |
| | One Column | |
| 1
 | Two Columns (1:1) | |
| | Two Columns (1:2) | |
| | Two Columns (2:1) | |
| | Cell Padding: 5 | |
| | Save Cancel | |
| | | |
| | | |
| | 😜 Internet Protected Mode: On 🛛 🖓 🔻 🔍 100% 👻 📑 | |

You can edit a section by clicking on a section and click on Edit.

ommon Tasks					🔚 Recreate Form	n Form	Rave Save
Table:	Credit Card		Form:	Edit Form			
ldd 🕶 🛛 🏠 🦊	⇔ ⇒ 🚮	dit 🛛 🗙 Remove					
– Overview —		0	 				
Type:							
Last Four Digits:			Expira	ation Month:			
Card Number:			Expira	ation Year:			
Security Code:							
Customer Service Phone Number:							
- Credit Card 2							
			 11 11 11				

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

Common Tasks					🚈 Recreate Form 📔 🚰 Edit Form 📗 🔚 Save 🤜
Table:	Credit Card	Form:		Edit Form	
Add 🔹 🛉 🚯	🗢 🔿 📝 Edit 🗙 Remove				
Add Section					
Add Field	nj				
Last Four Digits:		Ex	pirati	ion Month:	
Card Number:		Ex	pirati	ion Year:	
Security Code:					
Customer Servic Phone Number:	e				
- Credit Card 2	2				
Last Four Digits:					
		11 11 11			

Select an existing associated field in the dropdown menu.

a. Checkmark the "Field is Read Only" box if you want the field to be unavailable for edit. When you see the rendered form, the field will be grayed out.

- 1. Select the "Item label showing on the form."
- 2. Hide Label: No label appears next to the text box
 - System Label: Shows the system name next text box
 - Custom Label: Enter in a custom label
- 3. Enter in a Label Width numerical value. Default is 120px.
- 4. Tab Index: enter an index for the tab.
- 5. Select a **View Type**, either a One Column or Two Column. In the dropdown, enter in the number of text box rows, up to 3.
- 6. Click **Save** to add the field to the section.

Common Tasks		🛅 Recreate Form	Edit Form	Save 🔹
Table:	Credit Card	SecommerceFramework - Windows Intern	1	
Add 🔻 🏠 🖣	🖡 👄 🔿 🔂 🔂 Edit 🛛 🗙 Rem	http://ecf.episerver.com/Apps/MetaDataBase/MetaUI/Pages/		
- Overview -		Add Field		
Type:		Add a new form item to the form.		
Last Four Digi	ts:	Field: Organization		
Card Number	:	Field Is Read Only		
Security Code	:			
Customer Ser Phone Numbe	vice er:	İtem label showing on the form. Item label		
Candib Can	4.2	System Label	-	
	d 2	Custom Label		
		Label Width: 120 px		
		Tab Index: 0		
		View Type:		
		One Column		
		Two Column		
		Rows: 1		
		Save Cancel		
		Internet Protected Mode: On 🏤 👻 🔍 100% 👻		

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

ommon Tasks				🔚 Recreate Form	Edit Form	Reve Save
Table:	Credit Card	Form:	Edit Form			
Add 🔹 🗌 🏠	🖡 🗢 🔿 🛛 🔂 Edit 🖌 Remo	/e				
- Overview						
Type:						
Last Four Dig	gits:	Expirati	on Month:			
Card Numbe	r:	Expirati	on Year:			
Security Cod	e:					
Customer Se Phone Numb	ervice er:					
- Credit Ca	rd 2					
Organization	1:					

You can re-arrange fields on a form but using the arrow controls on menu bar. Highlight the field and then click on the directional arrow you want the field to move to.

mmon Tasks				🛅 Recreate Form 📔 🎦 Edit Form 📗 🔚 Save
able:	Credit Card	Form:	Edit Form	
dd 🔻 🏠 📲	🕨 🗢 🔿 🛛 🔂 Edit 🛛 🗙 Remo	ve		
– Overview –				
Type:				
Last Four Digit	5:	Exp	piration Month:	
Card Number:		Exp	piration Year:	
Security Code	n.			
Customer Serv Phone Number	/ vice r:			
- Credit Caro	12			
Organization:				

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

Common Tasks				🛅 Recreate Form 📔 🚰 Edit Form 📗 🔛 Save 🕬
Table:	Credit Card	Form:	Edit Form	
Add 🔻 🏠 🦊	🗧 🚔 🛃 Edit 🗙 P	emove		
– Overview –				
Type:				
Last Four Digit	s:		Expiration Month:	
Card Number:			Expiration Year:	
			Security Code:	
Customer Serv Phone Number	ice :			
- Credit Card	2			
Organization:				

Deleting Sections and Fields

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

mmon Tasks				🔚 Recreate Form 📔 🚰 Edit Form	📕 Sav
able:	Credit Card	Form:	Edit Form		
dd 🔻 🏠 🦊	🗢 🔿 🔤 Edit 🛛 🗙 Remove				
- Overview					
Type:					
Last Four Digits:		Ex	piration Month:		
Card Number:		Ex	piration Year:		
Security Code:					
Customer Servio Phone Number:	:e				
- Credit Card	2				
Organization:					



Recreating a Form

Recreating a form allows a user to create a form from scratch with a single field rather than customize a form with all fields already in place. Click on **Recreate Form** on the upper right corner of the window.

ommon Tasks				🔚 Recreate Form 📔 🚰 Edit Form 📗 Save
Table:	Credit Card	Form:	Edit Form	<u>400</u>
dd 🔻 🏠 🦊	🗧 🔿 📑 Edit 🛛 🗙 Remo	ove		
– Overview –				
Type:				
Last Four Digits	s:		Expiration Month:	
Card Number:			Expiration Year:	
Security Code:				
Customer Serv Phone Number	ice			

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

Common Tasks			🔚 Recreate Form 📔 🚰 Edit Form 📗 🔚 Sav	/e 🔻
Table:	Credit Card	Form:	Edit Form	
Add 🔻 🛉 🔒	🦊 🗢 🔿 🚮 Edit 🗙 Re	emove		
– Credit Car	rd			_
Card Number	r.			
<u> </u>				
 		3		

Saving a Customized Form

Once you are done with your changes, click on **Save** on the upper right corner of the window. To save and close the window at the same time, click the down-arrow next on the Save button and on the drop-down click **Save and close**.

Common Tasks				Kecreate Form	Save
Table:	Credit Card	Form:	Edit Form		Save
- Overview —					
Type:					
Last Four Digits:			Expiration Month:		
Card Number:			Expiration Year:		
Security Code:					
Customer Servic Phone Number:	e				
L					

Once those changes are saved, the form you edited will render based on your configuration. For example, here is the customized Credit Card edit form an end user sees.

New Credit Card				×
- Overview				
Type:	Visa 💌 😭			
Last Four Digits:		Expiration Month:	[No value]	•
Card Number:		Expiration Year:	[No value]	•
Customer Service Phone Number:		Security Code:		
- Credit Card 2 -				
Organization:	{Customer:CreditCard_mf_0	Organization_Descripti	ion}	

Relating Business Objects

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

Relations can be of these types:

- **1** to Many Relationship 1 object can be associated or related with multiple object-related data. For example, one organization can be associated with multiple contracts.
- *Many to 1 Relationship* Multiple object-related data can be associated or related with a single object. For example, multiple *contacts* can be related to a single organization.
- Many to Many Relationship Multiple object-related data can be associated or related with multiple objects. For example, different SKUs can be associated with one or more warehouses for tracking and storage.

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

Adding a 1 to Many Relation

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

In the example below, 1 = Organization and N = related objects such as Address, Contact, CreditCard etc.

To add a 1 to many relationship to a business object, you will need to create a new business object or use an existing one. On the Business Object Customization page, click on **1:N Relations.**

1ERCE	Configuration			Welcome, Manager
,				🕜 Get Help For This Page 😚
Business Object Cus	tomization			🊈 New Field 🛒 Edit 劃 Publish 予 Back To List
System Name:	露 CreditCard		Friendly Name:	Credit Card
Type:	Business Object		Plural Name:	CreditCard
Fields 1:N Relatio	ns N:1 Relations	N:N Relations Forms	System Views	
System Name	400	Friendly Name		Туре
Address		Address		Text (ReferencedField)
💭 Addressid		Address		Reference
₫ [©] CardType		Туре		CreditCardType
🐉 Contact		Contact		Text (ReferencedField)
💭 Contactid		Contact		Reference
₫ [©] Created		Created		DateTime

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

Business Object Cus	tomization				🊈 New Field 📷 Edit	进 Publish 🄁 Back To List
System Name:	鎍 Organization			Friendly Name:	Organization	
Type:	Business Object			Plural Name:	Organization	
Fields 1:N Relati	ions N:1 Relations	N:N Relations	Forms	System Views]	
					ř	New Relation "one to many"
Name		Primary Object		F	lelated Object	<u>4</u>)
Address Address		Organization		4	Address	
Gr Contact		Organization		C	Contact	1
		Organization		(Credit Card	=
ge Organization		Organization		C	Organization	1

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

- 1. Select a Related Object to relate an the Organization object in the dropdown.
- 2. The Object section below General Info will have a different title based on Related Object you selected. For example, if you selected "Address," the title would be "Object 'Address".
- 3. Enter in a **Field Name** and **Friendly Name**. They are auto-populated already using the system name of the business object.

Both names must be unique and not be the same as an existing field. The **Field Name** cannot contact spaces or special characters, only letters, numbers, and underscores.

- 4. Checkmark the box **Allow Nulls** if you do not want this to be a required field the user fill in while editing a form. Otherwise, uncheck the box to make it a required field.
- 5. Under **Add Field To**, checkmark the Forms you want the field to render in, such as the Edit Form (to enter and submit information) or View Form (read information only).
- Under the Object "Name of Primary Object" section, select a Display region in the dropdown box. Additional options such as **Display Text** and **Display Order** will appear based on your dropdown menu selection.
- 7. Once all the relevant information is entered, click on **Save**.

elation 1:N				
General Info				
Primary Object:	Organization			
Related Object:	Address			
Object "Address" —				
Field Name:	Organization			
Friendly Name:	Organization			
	Allow Nulls			
Add Field To:	☑ Edit Form			
	View Form			
	Short Info Form			
Object "Organization"	·			
Display Region:	[Not Set]			

The Related Object will have the Primary Object appear under the opposite relationship (N:1) on its configuration form. For instance, if organization is the Primary Object and the Related Object is Address, the relationship is automatically generated under the **N:1** tab in **Address**.

Configur	ation				Welc	come, admin
						🕜 Get Help For This Page 🔶
Business Object Cust	omization				🎦 New Field 🗊	Edit 🏭 Publish 🛃 Back To List
System Name:	鎍 Address			Friendly Name:	Address	
Type:	Business Object			Plural Name:	Address	
Fields 1:N Relation	N:1 Relations	N:N Relations Forms	System Views			
						🚈 New Relation "one to many"
Name		Primary Object		Related Object		
ge Contact		Address		Contact		_
gr∈ Contact		Address		Contact		
PreditCard		Address		Credit Card		1

Adding a Many to 1 Relation

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

In the example below, N = Organization and 1 = related objects such as Parentld, PrimaryContactld etc. To create **Many to 1 relationships**, click on a business object and click on the **N:1 Relations** tab.

MERCI	Co	onfiguration				Welcome, Manager
•						🕡 Get Help For This Page 🌲
Business	Object Custom	ization				🊈 New Field 📝 Edit 🎒 Publish 予 Back To List
System N	ame: 🔮	Crganization			Friendly Name:	Organization
Type:	В	usiness Object			Plural Name:	Organization
Fields	1:N Relations	N:1 Relations	N:N Relations	Forms	System Views	
System	Name	40	Friendly	Name		Туре
ुं∳ Busine	ssCategory		Busines	s Category		BusinessCategory
🔊 Create	d		Created			DateTime
₫ [©] Creato	rid		Creator			Guid

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

Business Obje	ect Customiza	tion				🊈 New Field 📝 Edit 🎒 Publis	h 🛃 Back To List
System Name:	🔮 C	rganization			Friendly Name:	Organization	
Type:	Busir	ness Object			Plural Name:	Organization	
Fields 1:	N Relations	N:1 Relations	N:N Relations	Forms	System Views		
						1 New Rela	ition "many to one"
System Nam	e	Name			Primary Object	Related Object	4m
🚛 Parentid		Parent			Organization	Organization	-
PrimaryCont	tactid	Primary	Contact		Contact	Organization	=/

The Relation N:1 form is very similar to the Relation 1:N form, except you can select the Primary Object from the dropdown, whereas the Related Object defaults to the name of the Business Object.

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

- 1. Select a **Primary Object** to relate an the Organization object in the dropdown. The Object section below General Info will have a different title based on the Related Object name.
- Enter in a Field Name and Friendly Name. They are auto-populated already using the system name of the business object.
 Both names must be unique and not be the same as an existing field. The Field Name cannot contact spaces or special characters, only letters, numbers, and underscores.
- 3. Checkmark the box **Allow Nulls** if you do not want this to be a required field the user fill in while editing a form. Otherwise, uncheck the box to make it a required field.
- 4. Under **Add Field To**, checkmark the Forms you want the field to render in, such as the Edit Form (to enter and submit information) or View Form (read information only).
- Under the Object "Name of Primary Object" section, select a Display region in the dropdown box. Additional options such as **Display Text** and **Display Order** will appear based on your dropdown menu selection.
- 6. Once all the relevant information is entered, click on Save.

Relation N:1	
- General Info	
Primary Object:	Address
Related Object:	Organization
Object "Organization" -	
Field Name:	Address
Friendly Name:	Address
	Allow Nulls
Add Field To:	🗹 Edit Form
	View Form
	Short Info Form
	System View (All organizations)
Object "Address"	
Display Region:	[Not Set]
	Save X Cancel



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

Adding a Many to Many Relation

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

In the example both Organization and Organization_Contact = N.

To create a **Many to Many relationship**, click on a business object and then click on the **N:N Relations** tab.

Cet Help For This Business Object Customization System Name: System Name: Corganization Friendly Name: Organization	Page 🌲 ck To List
Business Object Customization Herein Publish System Name:	ck To List
System Name: \$ Organization Friendly Name: Organization	
Type: Business Object Plural Name: Organization	
Fields 1:N Relations N:1 Relations N:N Relations	
System Name Friendry Name Type	
BusinessCategory Business Category Business Category	
a Search Created Created DateTime	
📓 Creatorid Creator Guid	
قَ ^{نَّ} Description Description LongText	
هُ Modified Modified DateTime	

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

Business	Object Customiz	ation				🎽 New Field 🛒 Edit 🎒 Put	olish 🛃 Back To List
System N	ame: 🍰	Organization			Friendly Name:	Organization	
Type:	Bu	siness Object			Plural Name:	Organization	
Fields	1:N Relations	N:1 Relations	N:N Relations	Forms	System Views		
						🊈 New Re	lation "many to many"
							4

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

- 1. The Current Object defaults to the name of the Business Object you are editing
- 2. Select a Related Object from the dropdown menu
- 3. The **Relation Name** is auto-populated by (Current Object Name_Related Object Name). Change this name if you wish, but you cannot have spaces or special characters, only letters, numbers, and underscores.
- 4. Enter in a **Friendly Name**, which can have special characters and spaces. Make sure both Relation and Friendly Names are unique do not already exist.
- 5. Under Current Object, select a Display Region where the field will appear.
- 6. Under Related Object, select a Display Region where the field will appear.

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

elation N:N				
General Info				
Current Object:	SKUs			
Related Object:	SKU_Warehouse			
Relation Name:	SKUs_Warehouse			
Friendly Name:	SKUsSKUs Warehouses			
Current Object (SKUs	5)			
Display Region:	Information			
Display Text:	SKUs Warehouses			
Display Order:	10000			
Related Object (SKU_	Warehouse)			
Display Region:	Information			
Disalar Taut	SKUs			
Display Text:				

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

Publishing Business Objects

Introduction

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

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

Setting Permissions and Publishing

Click on Publish on the Business Object Customization page.

MERCI	E Co	onfiguratior	ı			Welcome, Store Manager	
•						🕜 Get Help For T	his Page 🔶
Business	Object Custom	nization			🊈 New Field	। 🛃 Edit 🎒 Publish । 🄁	Back To List
System N	ame: 🔍	ধ Contract		Frien	dly Name:	Contract Name	
Type:	E	Business Object (Pub	lic)	Plura	I Name:	Contract	
Fields	1:N Relations	N:1 Relations	N:N Relations	Forms	System Views		
System	n Name		Friendly Name			Туре	
👼 Contra	ict		Contract Name			Text	
🗟 Contra	ictld		ld			Guid	
🐉 Organi	ization		Organization			Text (ReferencedField)	
🗉 Organi	izationId		Organization			Reference	🗹 🗙

You can set permissions by customizing **Access Permissions**. This string is auto-generated. To change, you can copy and paste string values from other objects.

🚮 Dashboard	0	Display Region:	< nothing is selected >
🕵 Customer Management	40		
Catalog Management	60	Display Text:	Contract
💘 Order Management	80	Display Order:	10000
Marketing	100		
Asset Management	120	Client Script:	CSManagementClient.ChangeBafView('Contract', 'Lis
🔡 Reporting	130	Access	
Administration	200	Permissions:	businessfoundation:contract:list:permission
		Item Icon:	Browee
		item ieom -	Lionoo
			V Publish

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

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

Deleting Business Objects

Once a business object has been published, you can delete all **customized** business object by going to **Administration > System Settings > Business Foundation**.

To remove from the left menu, you have to perform an additional step of going to Administration > System Settings > Left Menu and clicking the Delete icon.

EPiserver <u>com</u>	MERCE Left Menu	Welcome, admin
Welcome * Change Language About *		🕜 Get Help For This Page 🌩
Administration 🍣	Add	
🖻 🍸 Administration	Title	Order
🖃 🔄 System Settings	Dashboard	0
Dictionaries	Home Home	10
Logs	Customer Management	40
Business Foundation	Organizations	30
Workflow	Contacts	40
Search Index	Roles	50
Left Menu	Gift Cards	10000
Catalog System	Catalog Management	60
B 🔄 Order System	Catalog Entry Search	10
	Catalog Batch Update	20
	Catalogs	30
	Templates	40
A Dashboard	📷 🖉 Order Management	80
	Order Search	10
Customer Management	Purchase Orders	20
Catalog Management	Today	10
Crder Management	This Week	20
o o Marketing	This Month	30
	All	40
Asset Management	Purchase Orders By Status	30
Reporting		

Updating the Search Index

Introduction

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

There are two types of indexing: **Build** and **Rebuild**. Use the **Build** option to make a **quick re-indexing** of an existing catalog where you made changes to existing products. Build is faster than a rebuild because it performs a reindexing of only the items that were changed since the last build.

If you are using a brand new catalog or you made structural changes to your existing catalog (i.e. moving categories around, changing a product name, etc.), then you will need to perform a **Rebuild**. Rebuild takes longer because it does a complete indexing.

Building and Rebuilding the Catalog

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

EPISERVER COM	1ERCE Sear	Welcome, admin ch Manager
Welcome 🕈 Change Language About 🕈		🕡 Get Help For This Page
Administration 2	Index	
System Settings Dictionaries Logs Common Settings	Search Configuration Default Search Provider: Lucen Installed Search Providers: Solr! Indexers: catalog (built 2/22/2	eSearchProvider iearchProvider; LuceneSearchProvider; D12 4:08:01 AM);
Business Foundation Workflow Search Index Left Menu	Index Operations Rebuild Index Rebuild to the build the buil	he Search Index. This operation will cause complete index rebuild. Search Index. This operation will build the index for items updated since last build.
🗄 🛄 Catalog System 🗄 🛄 Order System		

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

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

Customizing the Left Menu

Introduction

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

Adding a Left Menu Item from the Left Menu Page

To add a **Left Menu** item, you have two choices. You can either configure the entire menu item first within Business Foundation or you can add an empty container by clicking the **Add** button and then go back to Business Foundation to fill in the page contents (objects).

EPISERVER COM	MERCE Left Menu	Welcome, admin
Welcome * Change Language About *		😨 Get Help For This Page 🌲
Administration 🏻 👌	Aqg	
Administration	Title	Order
🖃 🔂 System Settings	Dashboard	0
🕀 🛄 Dictionaries	Home	10
± Logs	Customer Management	40
Business Foundation	Organizations	30
Workflow	Contacts	40
Search Index	Roles	50
E Left Menu	Gift Cards	10000
Catalog System	Catalog Management	60
	Catalog Entry Search	10
	Catalog Batch Update	20
	Catalogs	30
	Templates	40
	🚽 Order Management	80
	Order Search	10
Customer Management	Purchase Orders	20
Catalog Management	Today	10
👻 Order Management	This Week	20
0 0 Marketing	This Month	30
	- All	40
Asset Management	Purchase Orders By Status	30
Reporting		
Administration	Page Size: 20 🔻	(83 items) Page ∢ 1 <u>2</u> <u>3</u> <u>4</u> <u>5</u> ⊧

A new window will pop up for publication settings.

- Select a **Display Region** from the navigation three on the left. Click on the node you want Contract to be placed under. For example, Contract will be placed on the root level of Customer Management.
- 2. The **Display Text** defaults to the system name of the Business Object. You can choose to keep the name or change it.
- 3. Enter in an **Item Link**, an URL to a page. When the object is clicked, a new window will appear on the right based on the given link.
- 4. The **Display Order** defaults to 10000. You can keep it at that number or change the value to determine the position of the node.
- 5. Access Permissions is auto-populated only when a menu is created through the Business Foundation. When creating a new left menu from scratch, you may leave this field blank or otherwise copy in permissions from other existing menus. If you want to change Access Permissions, refer to the Permissions section.
- 6. An Item Icon can be uploaded to represent the node. Click Browse to upload an icon.
- 7. Once all relevant information is entered, click on **Publish**.

dding				2
🖥 🚮 Dashboard	0	Display Region:	Customer Management	
🗄 🕵 Customer Management	40	Display Text:	Contracts	
🗄 🚞 Catalog Management	60			
🖥 💘 Order Management	80	Item Link:		
🗄 🚰 Marketing	100	Display Order:	10000	
📲 Asset Management	120	bispidy orderi		
🖳 Reporting	130	Access		
Administration	200	Permissions:		
		Item Icon:	Browse	
			✓ Add ★ Close	

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



Editing, Ordering, or Deleting a Left Menu Item

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

Add		
	Title	Order
	Dashboard	0
	Home	10
2	Customer Management	40
2	Organizations	30
2	Contacts	40
2	Roles	50
∦ ×	Contracts	10000
Edit	Catalog Management	60
	Catalog Entry Search	10

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

Editing		×
Display Text:	Contracts	
Item Link:	http://world.episerver.com/contracts	
Display Order:	100	
Access Permissions:		
Item Icon:	Browse	
	OK Cancel	

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

To change the sort order of the left menu item, adjust the numerical value in **Display Order**. The lower the value, the higher the position of the item within the navigation tree relative to items with a higher Display Order value.

Editing	X
Display Text:	Contract
Client Script:	CSManagementClient.ChangeBafView('Contract', 'Lis
Display Order:	10000
Access Permissions:	businessfoundation:contract:list:permission
Item Icon:	Browse
	OK Cancel

To save changes, click **OK**.

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

EPISERVER COM	MERCE Left Menu	Welcome, admin
Welcome 🎽 Change Language About 🔻		🕜 Get Help For This Page 🗢
Administration 🍣	Add	
Administration	Title	Order
🗄 🚍 System Settings	Dashboard	0
Dictionaries	🗐 Home	10
🗄 🔄 Logs	🗐 Customer Management	40
Business Foundation	Organizations	30
Workflow	Contacts	40
Search Index	Roles	50
Left Menu	Gift Cards	10000
Catalog System	Catalog Management	60
🗄 🔜 Order System	Catalog Entry Search	10
	Catalog Batch Update	20
	Catalogs	30
	Templates	40
C Dashboard	🚀 Order Management	80
	🚽 Order Search	10
Customer Management	Purchase Orders	20
Catalog Management	Today	10
\min Order Management	This Week	20
Marketing	🚀 This Month	30
	All	40
Asset Management	Purchase Orders By Status	30
Reporting		

Catalog System Administration

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

The features can be accessed by selecting Catalog System under Administration



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

Warehouses

Introduction

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



A SKU can only have one warehouse associated to it.

Adding a Warehouse

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

Administration			æ
🗄 🧰 System Settings			
😑 😋 Catalog	System		
 Wareł 	nouses	վեր	
Tax C	ategories		
💿 Meta	Classes		
💿 Meta	Fields		

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

IERCE	Warehouse List			Welcome, ad	min
New Warehouse	More Actions *			😧 Ge	t Help For This Pa
Name Name		IsActive	Created	Modified	Sort Order
Default Warehouse		True	5/11/2010 1:25:45 PM	5/11/2010 1:26:31 PM	0

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

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

IERCE	Warehouse Edit
Overview	Address
Name:	New Warehouse
Code:	new warehouse
Sort Order:	10
	The sort order for the category entry.
Available:	● Yes
Is Primary:	💮 Yes 🛛 💿 No
ОК	Cancel

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

Overview A	ddress
First Name:	
Last Name:	
Organization:	
Line 1:	
Line 2:	
City:	
State:	
Country Code:	
Country Name:	
Postal Code:	
Region Code:	
Region Name:	
Day Phone:	
Evening Phone:	
Fax Number:	
Email:	
ОК	Cancel

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

New Warehouse 😨 More Actions 🔻									
Name	IsActive	Created	Modified	Sort Order					
Default Warehouse	True	5/11/2010 1:25:45 PM	5/11/2010 1:26:31 PM	0					
New Warehouse	True	Today, 1:17 PM	Today, 1:17 PM	10					

Deleting a Warehouse

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

N	ew Warehouse	🗳 More Actions 🔻
	Name	X Delete Selected
	Default Warehou	se
V	New Warehouse	

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

Tax Categories

Introduction

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

Configuration section for more detailed information.

Adding a Tax Category

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



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

Deleting a Tax Category

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

Catalog Meta Classes and Fields

Introduction

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

When meta fields and classes have been created in the System Administration part of Commerce Manager, they will be available for usage when working with *product entries in the product catalog*. Refer also to the section *Using Meta Classes and Meta Fields* for catalog attributes.

Creating a Meta Class

Do the following to create a meta class:

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

2. Click Create New and select New Meta Class.

EPISERVER COM	MERC	E	Meta Classes	Welcome, admin				
Welcome * Change Language About *				🕜 Get H				
Administration 😂 🗋 Create New 🛛 🖄 Import/Export 🔨								
Administration Catalog System Catalog System Catalog System Catalog System Catalog System Catagories Catagor	Rev New Name: Friendly N Description	v Meta Clas v Meta Fiel Bra Brar Vame: Brar	a a a a a a a a a a a a a a a a a a a					
🗄 🛄 Tax Configuration								
	Select	Sort	Name					
			Return form number					
			PO Number					
			Expiration Date					
			Parent Order Id					
			Card type					
			Expiration Month					
			Expiration Year					

3. Enter the meta class details.

Name - name of the meta class used in your code, this cannot have any spaces.
 Friendly Name - name of the meta class displayed for practical use in Catalog Management.
 Description - description of the meta class.
 Object Type - select Catalog Node or Catalog Entry.

- 4. Click **OK** to save your changes.
- 5. You will now see that your newly created meta class is available in the drop-down for Type.

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

Creating a Meta Field

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

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

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

EPISERVER COMMERCE Meta Fields							
Welcome * Change Language About * 00 Get Help For This Page							
Administration 🍣							
Administration	in 🖑	Name	Туре	Multi-Language	Compare	Search	
🗉 🧰 System Settings	167	ABV	Decimal	False	True	True	
🖻 🔂 Catalog System	168	Closure	ShortString	True	True	True	
Warehouses	169	Color	ShortString	True	True	True	
Tax Categories	170	Description	LongHtmlString	True	False	True	
Meta Classes	171	DisplayName	ShortString	True	True	True	
Meta Fields	172	ExtendedDesription	LongHtmlString	True	False	True	
Grder System	173	Margin	Decimal	False	True	False	
Meta Classes	174	Maturity	ShortString	True	True	True	
Meta Fields	175	Organic	Boolean	False	True	False	
The Payments	176	PrimaryImage	ImageFile	False	False	False	
Shinning	177	RecommendBoost	Integer	False	False	False	
Tax Configuration	178	Region	ShortString	True	True	True	
	179	Size	Float	False	True	True	

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

1ERCE	Meta Field Edit	Welcome, admin
		🕜 Get
Name:	Wooden	
Friendly Name:	Wooden	
Description:	Wooden	* *
Type:	Short String 🗸	
	V Supports Multiple Languages	
	🕼 Use in comparing	
	Allow Null Values	
	Save History	
	Use Encryption	
Search Properties:	✓ Allow Search	
	Enable Sorting Search Results	
	Include Values in Search Results	
	V Tokenize	
	Include in the Default Search	
OK Can	icel	

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

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

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



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

Applying Meta Fields to a Meta Class

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

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

1ERC	E	Meta Classes				
Creat	e New 🔻 📗	Dimport/Export				
Element: Catalog Entry						
Type: Barrel 🗸						
Name:	Barre	rel				
Friendly	Name: Barre	rel				
Description: Barrel						
			-			
Select	Sort	Name	Ŧ			
Select	Sort	Name	Ŧ			
Select	Sort 1 2	Name Return form number PO Number	Ŧ			
Select	Sort 1 2	Name Return form number PO Number Expiration Date	~			
Select	Sort 1 2 3	Name Return form number PO Number Expiration Date Parent Order Id	Ŧ			
Select	Sort 1 2 3	Name Return form number PO Number Expiration Date Parent Order Id Card type	~			

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

Order System Administration

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

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



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

Payments

Introduction

Payments is an essential part of an e-commerce system. When shopping online customers will be presented with a number of different payment options. When creating and configuring payments in EPiServer Commerce, there are three components that need to be created or re-used as well as configured: **Payment Types**, **Payment Gateways** and **Payment Methods**.

Payment Types – these are **meta classes** which contain the properties of a particular payment type. For example, a credit card payment type contains credit card number, card expiration date and card type. The most common payment types are already built-in to EPiServer Commerce:

- Credit card
- Cash Card
- Gift Card
- Invoice

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

Payment Gateways – these provide an **interface** to the system which provides payment processing. A payment type is passed to the payment gateway and the gateway executes the payment transaction with the payment system (e.g. PayPal). One payment type is associated with each payment gateway.

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

Using Built-In Payment Gateways

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



The Payment Methods window appears.

MERCE Payme		Payment	t Meth	ods		Welcome, admin		
								🕜 Get Help For This Page 🗢
Ne	New 🖄 More Actions 🔻							
			Name	IsActive	IsDefault	Ordering	Created	Last Modified
		\times	Gift Card	True	False	0	2/22/2012 5:08:21 AM	2/22/2012 5:08:21 AM
		\times	Pay By Credit Card	True	False	2	4/20/2010 2:00:00 AM	4/20/2010 2:00:00 AM
		\times	ExchangePayment	False	False	2	4/20/2010 2:00:00 AM	4/20/2010 2:00:00 AM
		\times	Pay By Phone	True	True	2	4/20/2010 2:00:00 AM	4/20/2010 2:00:00 AM
	1	×	Credit on Account	True	False	100	2/22/2012 5:08:21 AM	2/22/2012 5:08:21 AM

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

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

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

MERCE	Payment Method Edit
•	
Overview Parame	ters
ID:	
Name:	
Description:	
System Keyword:	
Language.	
Class Name:	(none)
Sort Order:	0
IsActive:	O Yes O No
IsDefault:	O Yes O No
Supports Recurring:	💮 Yes 💿 No
Restricted Shipping	J Methods
Available Shipping Me	thods Chosen Shipping Methods
Default Shipping Online Download	Add -> Add All ->> < Remove << Remove All
OK Cancel	

Here is an explanation of some of the gateway properties:

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

Restricted Shipping Methods

Available Shipping Methods		Chosen Shipping Methods
Default Shipping Online Download	Add ->	
	<- Remove <<- Remove All	

Restricted Shipping Methods

Available Shipping Methods	(Chosen Shipping Methods
Online Download		Default Shipping
	Add -> Add All ->> <- Remove <<- Remove All ⁹	

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

MERCE	Payment Methods				Welcome	, admin
•					G	Get Help For This Page 🌲
New 🎯 More Action:	;▼					
Name		IsActive	IsDefault	Ordering	Created	Last Modified
🔲 📝 🗙 Money Orde		False	False	0	Today, 10:45 AM	Today, 10:45 AM
Payment by	ard (DIBS)	True	True	0	5/12/2010 6:10:05 AM	5/12/2010 6:10:05 AM
🔲 📑 🗙 Pay By Phon	2	True	True	1	1/1/2006 1:00:00 AM	5/12/2010 6:10:34 AM
🔲 📑 🗙 Pay By Credi	t Card	True	False	2	1/1/2006 1:00:00 AM	1/1/2007 1:00:00 AM

Using nSoftware Provided Payment Gateways

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

- 1. To enable nSoftware supported gateways, create a new payment method.
- 2. Enter in a Name, such as nSoftware or anything else.
- 3. Enter in a **Description**.
- 4. Enter in the System Keyword as "ICharge".
- 5. Select a Language from the drop-down menu.
- 6. Select the Class Name "Mediachase.Commerce.Plugins.Payment.ICharge.IChargeGateway".
- 7. Select "Yes" for IsActive.
- 8. Change the Sort Order, IsDefault, Supports Recurring as needed.
- 9. Click **OK** to save changes.

MERCE	Payment Method Edit
r	
Overview Parame	ters
ID:	
Name:	nSoftware
Description:	nSoftware
System Keyword:	ICharge
Language:	select language
Class Name:	Mediachase.Commerce.Plugins.Payment.ICharge.IChargeGateway
Sort Order:	0
IsActive:	Yes ONO
IsDefault:	Yes ONO
Supports Recurring:	O Yes O No
Restricted Shipping) Methods
Available Shipping Me	thods Chosen Shipping Methods
Default Shipping Online Download	Add -> Add All ->> <- Remove <<- Remove,All
OK Cancel	

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

The **Configure IBiz E-Payment Integrator Component** appears and you can select from the **Gateway** drop-down menu several dozen of the most popular payment gateways will appear. Depending on the gateway you select, such as Authorize.Net, the **Configuration Parameters** will change. Enter in your credentials and other relevant information to activate the gateway and click **OK**.

Overview Parameters			
Configure IBiz E-Payment Integrator Compo	nent		
Gateway: Authorize.Net	Authorize.Net		
Get IBiz E-Payment Integrator from www.nsoftware.c	com. You will find more documentation on how to configure it there also.		
Configuration Parameters			
Payment Options:	Sale		
*Merchant Login:			
Merchant Password:			
Transaction Key:			
Secret Hash:			
Payment Gateway URL (used for testing):			
OK Cancel			

Editing Payment Methods

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

New 🛛 🎒 More Actions 🔻				
		Name		
	${\scriptstyle \blacksquare} \times$	nSoftware		
	\mathbb{K}^{\times}	Money Order		
	Edit	Payment by card (DIBS)		
	$\overline{\checkmark}$	Pay By Phone		
	$\blacksquare \times$	Pay By Credit Card		

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

MERCE	Payment Method Edit	
•		
Overview Parame	leters	
ID:	e0fbbe1d-053f-4adc-b15c-669374639502	
Name:	Money Order	
Description:	۸ ٦	
System Keyword:		
Language:	English (United States)	
Class Name:	EPiServer.Business.Commerce.Payment.DIBS.DIBSPaymentGateway	•
Sort Order:	0	
IsActive:	O Yes O No	
IsDefault:	💿 Yes 💿 No	
Supports Recurring:	🔘 Yes 🛛 💿 No	
Restricted Shipping	ig Methods	
Available Shipping Me	lethods Chosen Shipping Methods	
Online Download	Add -> Add All ->> <- Remove	
OK Cance	el	

Deleting Payment Methods

To delete **Payment Methods**, click on the **X** icon next to the payment method name and click **OK** when the popup appears. To delete multiple payment methods at once, check mark each payment method you want to delete, then click on **More Actions --> Delete** on the drop-down menu. Click **OK** when the popup appears.

Shipping

Introduction

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

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

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

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

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



Shipping Methods

A *shipping method* manages a set of information and rules that determines the shipping cost and displays it on the front-end site while a customer checks out an item from his/her shopping basket. The shipping fee is added to the total price of the purchase. A shipping method is mapped to a shipping provider visible to a back-end administrator in Commerce Manager. This allows the public site to display friendly names such as "Ground Shipping" to the customer and this is mapped to a provider such as UPS. Therefore, when a customer picks "Ground Shipping", UPS will be used by default.

Shipping Providers

A *shipping provider* is the class(es) that interacts directly with one or more actual shipping services such as USPS, UPS, or FedEX. It retrieves shipping price information from the shipping service(s) its associated with. One typical scenario would be to have a provider that represents a particular service (e.g. USPS). A provider can also represent a particular type of shipping situation. One example is that you could have a provider for overnight delivery. The provider could retrieve pricing for that service to determine the lowest price given the location of the customer. A provider could also represent other specific scenarios with one or more services such as price by weight or ground shipping.

Shipping Gateways

A shipping **gateway** is the specific class that you select (Generic Gateway or Weight/Jurisdiction Gateway). You select the shipping gateway in the **Shipping Provider** screen and then configure the actual values for that gateway/provider in the **Shipping Methods** area.

Shipping Jurisdictions

An option which allows you to define values for region-specific shipping rates; this is only used when you select the Weight/Jurisdiction Gateway, for instance for a "county".

Shipping Jurisdiction Groups

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

Shipping Methods

Introduction

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

Customizing Shipping Methods

There are two **Shipping Methods** available out of the box for you to customize: Ground Shipping and Fixed Shipping.

To customize the Shipping Methods, first go to Administration > Order System > Shipping > Shipping Methods > English (United States) or any other languages.

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

Overview Settings	s Parameters
ID:	alcalbca-6fbf-4b6f-b0lf-bbf3df23a02a
Name:	Default Shipping
Friendly Name:	Ground Shipping
Description:	Calculates shipping based on weight and zone.
	-
Provider:	Weight/Jurisdiction Gateway
Language:	English (United States)
Base Price:	2.00
Currency:	US dollar 💌
IsActive:	Yes No
IsDefault:	Yes No
Sort Order:	0
OK Cance	

- ID this is auto-generated after saving the new shipping method
- **Name** enter in a name without spaces or special character; this name will not be displayed in the public site, but is only for end users to manage and organize the shipping methods
- Friendly Name enter a friendly name which can have spaces and special character; the friendly name is the name seen by customers who are purchasing items
- **Description** enter a description (optional)
- **Provider** select an available provider from the drop-down menu; the options displayed here are created in the *Shipping Providers* screen (*Generic Gateway* is for a fixed shipping fee specified below under base price, while *Weight/Jurisdiction Gateway* is used for a shipping fee depended on the weight and shipping location)
- Language select a language of your choice from the drop-down menu

- **Base Price** the base price you specify here will become the fixed shipping fee for the Generic Gateway option, and part of the Weight/Jurisdiction Gateway option.
- IsActive select Yes or No under IsActive to enable is disable it, respectively
- IsDefault select Yes or No if this shipping method is the default one
- Sort Order enter a number for the sort order to determine its position on the list of shipping methods

The **Settings** tab is used to exclude any Countries, Regions, and Payments from a particular shipping method.

To exclude a selection, highlight the items on the **Available** boxes on the left and move them to the **Chosen Countries** boxes by clicking **Add**.

Aestricted Countries Chosen Countries Afghanistan Albania Algeria Add -> Andorra Andd All ->> Angola <-Remove Angola <-Remove Antarctica <-Remove Antarctica <-Remove Antarctica Alabama Alaska Areneina Samoa Arizona Arkansas Armed Forces Africa Armed Forces Americas (except (Armed Forces Canada Armed Forces Middle East Available Payments Pay By Oredit Card	Overview Settings Parameter	s
Available Countries Chosen Countries Afghanistan Algeria Algeria Add -> American Samoa Add All ->> Andorra And All ->> Angoila - Antarctica Antarctica Antarctica - Antasas - Alabama - Alaska - Alaska - Arkansas - Armed Forces Africa - Armed Forces Canada - Armed Forces Canada - Armed Forces Middle East - Restricted Payments - Add -> - Add All ->> - Add All ->> - Aramed Forces Middle East - Pay By Phone -	Restricted Countries	
Afghanistan Albania Algeria American Samoa Andorra Angola Angola Angola Angola Angola Angola Antarctica Antigua and Barbuda Arcentina Restricted Regions Add -> Alabama Alaska American Samoa Arkanasa Armed Forces Africa Armed Forces Canada Armed Forces Siddle East Restricted Payments Chosen Payments Pay By Phone Pay By Credit Card Add -> Add -> Add -> Add -> Add -> Add -> Arkanasa Armed Forces Canada Arguitable Payments Chosen Payments Payment by card (DIBS) nsoftware Pay By Phone Pay By Credit Card Add -> Add -> Add -> Add ->	Available Countries	Chosen Countries
Aestricted Regions Chosen Regions Alabama Alaska Alaska American Samoa Arizona Add -> Arkansas Add All ->> Armed Forces Africa <	Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina	Add -> Add All ->> <- Remove <<- Remove All
Available Regions Chosen Regions Alabama Alaska American Samoa Arizona Arkansas Armed Forces Africa Armed Forces Americas (except (Armed Forces Canada Armed Forces Europe Armed Forces Middle East Add -> Add All ->> Arestricted Payments Chosen Payments Restricted Payments Chosen Payments Payment by card (DIBS) nSoftware Pay By Phone Pay By Credit Card Add -> Add All ->> Add -> Add All ->> Add -> Add All ->> Add -> Add All ->> Add -> Add All ->>	Restricted Regions	
Alabama Alaska American Samoa Arizona Arkansas Armed Forces Africa Armed Forces Canada Armed Forces Canada Armed Forces Curope Armed Forces Middle East	Available Regions	Chosen Regions
Available Payments Chosen Payments Payment by card (DIBS) Add -> Nsoftware Add -> Pay By Phone Add All ->> Pay By Credit Card <- Remove	Alabama Alaska American Samoa Arizona Arkansas Armed Forces Africa Armed Forces Americas (except (Armed Forces Canada Armed Forces Europe Armed Forces Middle East	Add -> Add All ->> <- Remove <<- Remove All
Available Payments Chosen Payments Payment by card (DIBS) Add -> Nsoftware Add -> Pay By Phone Add All ->> Pay By Credit Card < Remove	Available Payments	Chosen Payments
	Payment by card (DIBS) nSoftware Pay By Phone Pay By Credit Card	Add -> Add All ->> <- Remove
OK Cancel	OK Cancel	

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

Jurisdiction Group:	United Stat	es 👻	Group				
Weight:		or more					
Price:							
Start Date:	5/25/2010 III 12:00 AM						
End Date:	5/25/2011		10:55 AM				
Add							
7 toron		Weight	Price	Start Date	End Date	Edit	
Group Name					10/0/2020 12:00:00 414	Madifi	Delete
Group Name United States		0 or more	10	10/8/2008 12:00:00 AM	10/8/2020 12:00:00 AM	Mouny	Delete

- Jurisdiction Group select a jurisdiction group to apply the current Shipping Method using the drop-down menu; the options listed here are set up in the Shipping Jurisdictions and Shipping Jurisdiction Groups screen.
- Weight enter a numerical value for the weight; units for the weight is set in the Common Settings screen
- Price enter a price to be added to the base price (Overview tab) when the weight and jurisdiction group conditions are met.
- Start Date enter a start date and time for the shipping method to take effect
- End Date enter a end date and time for the shipping method to expire

When finish entering the values above, select **Add** to save the condition. The condition will appear on table below. In the above example, if the customer checks out an item that weights anywhere between 0 to 10 weight units (lbs for example), and the customer's shipping address is in the United States, then the total shipping fee will equal \$10 + the base price you enter in the overview screen.

Click **OK** to save changes.

Deleting Shipping Methods

- 1. Check off the box that corresponds to the shipping methods you want to delete.
- 2. Click on the More Actions button on the upper left corner of the main window menu bar, and choose **Delete** from the pull down menu.
- 3. Click OK when prompted. The selected methods will be deleted from the list.

1ERCE			Shipping Methods	\$
N	ew	2	More Actions •	
			Name	Display Name
		\times	Default Shipping	Ground Shipping
	1	严	Online Download	Fixed Shipping Rate
		Ľ	elete	

Shipping Providers

Introduction

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

ages the list of these providers/types. There are two shipping methods available out of the box for you to customize: 1) Generic Gateway and 2) Weight/Jurisdiction Gateway.

A **Generic Gateway** is used for a fixed shipping fee while **Weight/Jurisdiction Gateway** is used for a shipping fee that is calculated based on the weight and shipping location.

Customizing Shipping Providers

Go to Administration > Order System > Shipping > Shipping Providers. Edit one of the two providers listed.

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

The revised shipping provider will appear in the Shipping Providers page.

The **Parameters** and **Packages** tabs are not fully implemented; they serve as a starting point for developers for full implementation of those features.

Deleting Shipping Providers

- 1. Go to the **Shipping Providers** page.
- 2. Check off the box that corresponds to the shipping providers you want to delete.

3. Click on the **More Actions** button on the upper left corner of the main window menu bar, and choose **Delete** from the pull down menu.

4. Click OK when prompted. The selected providers will be deleted from the list.

IER	C	E	Shipping Providers
📄 N	ew	2	More Actions •
			Name
	1	\times	Generic Gateway
	2	杰	Weight/Jurisdiction Gateway
			elete

Tax Configuration

Introduction

Taxes can be configured so that specified rates are calculated and added to the total price during the checkout process. Depending on your configuration, it is also possible to combine and apply multiple taxes (such as federal, state and local tax) to a purchase.

Taxes can be set up and maintained using two methods:

- Creating/editing each tax control manually
- Importing all data using a CSV file.

In the following we will provide a few examples to demonstrate how this works.

Taxes are configured
Configuring Taxes Manually

To set up your taxes manually, you will need to work with the following areas in the **Administration** tab of the Admin Site – **Tax Categories, Tax Jurisdiction Groups, Tax Jurisdictions, and Taxes** – as well as the configuration pages for each of the catalog items.

The steps below summarize the process you need to follow to configure taxes.

- Create and configure Countries and Regions (Go to Administration > System Settings > Dictionaries > Countries): In Countries section create the countries you plan to sell your products in and set the appropriate country codes. For the country codes, it is important that you use the ISO Short code provided at MSDN site Table of Language Culture Name, Codes, and ISO Values Method [C++]. Using the ISO Long code or anything else will not correctly calculate taxes during checkout.
- 2. Create new Tax Categories (Go to Administration > Catalog System): In this step you will create tax categories that will be used later to associate your catalog items with the tax rates you define. For example you may create categories such as "General Sales," "Food," and "Luxury Items" depending on the tax regulations for your item types. The categories you create here will become selectable on the Page Details of your items (i.e., Variations/SKU Edit page) and on the Tax Edit page.
- 3. Create and configure Tax Jurisdictions (Go to Administration > Order system > Tax Configuration): In this step you will specify particular Tax Jurisdictions. You can create different Tax Jurisdictions for a particular region by specifying zip codes, country codes, etc. Tax rates will be applied to whatever level of information you specify for each Jurisdiction. For example, if you specify only the country code as US, all shoppers with a US address (regardless of state, county etc.) will be included in this jurisdiction. Note: Country Code and Region Code you enter in the Jurisdictions Edit page must match the codes you used in step 1.
- Create and configure new Tax Jurisdiction Groups (Go to Administration > Order system > Tax Configuration): New Tax Jurisdiction Groups created here can include multiple Tax Jurisdictions.
- Create and configure Taxes (Go to Administration > Order System > Tax Configuration): Here you will specify tax rates and also associate the Tax Categories and Jurisdiction groups created in Steps 2 and 4.
- Associate Catalogs to the Tax Categories created in Step 2 (Go to Order Management > Catalogs): Now you will switch over to the Catalog Management subsystem and link specific catalog items to the appropriate Tax Categories. This can be done on the Pricing/Inventory page within each Variation/SKU Edit page.

Configuring Taxes Using CSV Import

Using the CSV Tax Import functionality is a convenient way to quickly setup and update tax data in bulk. Creating a CSV tax file with a specified format (see "Example Scenarios" below) will allow you to complete steps 2 through 5 in one shot (above in Method 1). Step 6 of Method 1 can be done manually, but you can also use the CSV import functionality in the Catalog Management subsystem to associate catalogs to tax categories. Click *here* to see how CSV Catalog Import works.

Import your CSV tax file into your Commerce Manager by following the steps:

- 1. Select the Administration tab in the Commerce Manager.
- 2. In the navigation tree drill down to Taxes: Order System > Taxes Configuration > Taxes.
- 3. Click Import Taxes on the menu bar.

- 4. Choose **Add New File** and then **Browse** to select and upload your CSV tax file. The path of your chosen file will appear in the field.
- 5. Click **Upload File** and then **Save The File** icon. The CSV tax file will appear under the **Files Available for Import** section.
- 6. Select and highlight the CSV file and click the "Start Import" button.
- 7. Your import should begin and complete successfully in a pop-up dialog box.
- 8. You will now be able to view your tax setup in the Commerce Manager.

If you want to edit the existing setup, simply repeat steps 1 through 8 with your modified file.

Caution: Re-importing CSV files only edits existing information or adds new data, but nothing gets deleted. If you delete an entire row of data in the CSV file, you must manually delete those entries in the Commerce Manager. If in doubt, you can always delete all the tax data and perform the CSV tax import from scratch.

Sample CSV Files and Scenarios

Example 1: Single Tax Per Catalog Item Based on a Single Jurisdiction

For example, if your variable is State, then you can specify the tax rate on a state-level. So let's say CA is 9% and MA is 6%. If you placed an order from California, then 9% sales tax would be applied during checkout.

Jurisdiction	Jurisdiction Group	Tax Rate	Tax Category
California	CA Tax Group	9%	General Sales
Massachusetts	MA Tax Group	6%	General Sales

A sample tax CSV file called test.csv is available in this directory - [taxcsvsample1.zip].

Example 2: Two or More Taxes Per Catalog Item Based on More Than One Juridiction

For example, if you have a luxury item that requires State and Federal tax to be applied, then you can specify tax rates on a state and federal level. So let's say a luxury item purchased in CA has a 9% state tax rate and a federal tax rate of 3%. Both taxes would be applied during checkout.

Jurisdiction	Jurisdiction Group	Tax Rate	Tax Category
California General	CA GS Tax Group	9%	General Sales
Massachusetts General	MA GS Tax Group	6%	General Sales
California Luxury	CA LX Tax Group	9%	Luxury Sales
Massachusetts Luxury	MA LX Tax Group	6%	Luxury Sales
US Federal Luxury	US LX Tax Group	3%	Luxury Sales

Order Meta Classes and Fields

Introduction

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

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



Default order meta fields used by the ordering process are built into the system and are not available. However, you can add your own meta fields to extend the attributes of your orders.

Creating a Meta Class

Do the following to create a meta class:

- 1. Navigate to Administration, Order System and select Meta Classes. This will open the Meta Classes page.
- 2. Click Create New and select New Meta Class.

EPISERVER COM	MERC	E	Meta Classes
Welcome [*] Change Language About [*]			
Administration 🍣	Creat	e New 🔻 🗌	🕏 Import/Export 🔻
Administration Catalog System Catalog System Catalog System Meta Classes Meta Fields Shipping Tax Configuration	Name: Friendly I Descripti	v Meta Clas v Meta Field Purc Purc Vame: Purc on: Cont	thase Order
	Select	Sort	Name
			Return form number
		0	PO Number
		0	Expiration Date
		0	Parent Order Id

3. Enter the meta class details.

Name - name of the meta class used in your code, this cannot have any spaces.
 Friendly Name - name of the meta class displayed for practical use in Order Management.
 Description - description of the meta class.

Object Type - select Order Group, Order Form, Shipment, Lineltem, Order Group Address or Order Form Payment.

- 4. Click **OK** to save your changes.
- 5. You will now see that your newly created meta class is available in the drop-down for **Type**.

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

Creating a Meta Field

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

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

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

EPISERVER COM	IMERCE	Meta Fields				
Welcome * Change Language About	•					
Administration	New Meta Field					
Administration	ID Wame		Туре	Multi-Language	Compare	Search
🗄 🦲 System Settings			Th	ere are no items avail	able.	
🗉 🧰 Catalog System						
🗟 😋 Order System						
Meta Classes						
Meta Fields						
🗉 🧰 Payments						
🗉 🧰 Shipping						
🗄 🦲 Tax Configuration						

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

3. Enter Meta Fields details.

1ERCE	Meta Field Edit
Name:	VIP
Friendly Name:	VIP
Description:	VIP Customer
Type:	Short String 👻
	✓ Supports Multiple Languages
	✓ Use in comparing
	V Allow Null Values
	Save History
	Use Encryption
Search Properties:	✓ Allow Search
	Enable Sorting Search Results
	☑ Include Values in Search Results
	Tokenize

Field	Description
Name	Enter a system name without spaces or special characters for example "Num- berMegapixels".
Friendly Name	Enter a user-friendly name seen by end-users on the back and front-end.
Description	Enter any additional information about the meta field.
Туре	The drop-down menu shows the field types you can use for the meta field. The types available are: - datetime

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

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

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

Applying Meta Fields to a Meta Class

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

- 1. Navigate to Administration, Order System and select Meta Classes.
- 2. Select **Catalog Entry** from the **Element** drop-down menu, then select the desired meta class from the **Type** drop-down.

3. To apply a meta field to a meta class, check mark the box next to the meta field. If you wish to sort the order that the meta fields appear in, enter a number into the **Sort** field.

M	IERC	E		Meta Classe	s		
1 [• 1 (9 Inc			
		e new	• l	Mimport/Export			
	Element:		Ord	er Form	•]	
	Туре:		Orde	er Group er Form	N		
	Name:		Ship Linel Orde	ment tem er Group Address	3		
	Friendly N	Name:	Orde	r Form Payment			
	Description: Orde		Orde	Form Extended Class			h.
							-
	Select	So	rt			Name	
	V	0		Return form number			
	V	1		PO Number			
4				Expiration Date			
1.0	V	2		Parent Order Id			
				Card type			

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

Access Rights

Introduction

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

Managing users involves both customer contact administration, as well as defining access rights for system users working with *online store administration* in Commerce Manager, and users *working with editorial content*. These may or may not be the same individuals, depending how your organization is set up.

EPiServer Commerce has full support for the standard EPiServer Membership and Role Providers, including Multiplex and Active Directory. This means that users and their access rights are managed in the same way in the system. Refer to the technical documentation for EPiServer CMS for more information on role and membership providers.

Contacts and Accounts

A contact can have an **account** associated with it, which is needed if you want to assign access rights to that contact. Only contacts with associated accounts will appear in the CMS administration interface.



A contact must have an **account** associated with it to in order to be able to apply roles and set access rights in Commerce Manager and the CMS system respectively.

When an online shopper decides to register with the website, a contact with an account is created. However, anonymous shopping is allowed, which means that shoppers are not required to create an account in order to purchase. Contacts can belong to **organizations**. The relationship between organizations, contacts, accounts, roles and user groups, is illustrated below.



Contacts, accounts and organizations are administered from the *Customers system*. This includes managing user accounts and adding roles to users (contacts). Setting access rights for editorial content management in the page tree of the website is done from the CMS administration interface.

The EPiServer Commerce sample site has a number of predefined users, roles and groups both for administering e-commerce tasks as well as managing editorial content. Remember that these users and groups are only examples of how you can set up access rights for your website.

Defining User Access

Introduction

Users can be created either from the **CMS Admin mode**, or from the **Contacts** section under **Customer Management** in Commerce Manager. When a user is created in CMS, the user will appear as a *contact with an account* in Commerce Manager. However, when a user is created in Commerce Manager, it will appear in CMS only when an account has been created for the user in Commerce Manager.

When a user has been created in the system, you can define the desired access rights, depending on whether the user is going to work with *content in the editorial interface of CMS*, or with *store administration in Commerce Manager*.

Store Administrators

The *Customers* system allows for creating users and groups with either pre-configured roles or custom roles which control access to different systems or individual elements within a system.

When you install EPiServer Commerce, you are provided with an **administration account** with the following credentials:

- Username "admin"
- Password "store"

The predefined administration account is given full privileges, meaning it has full access to all systems and all elements within each system. Therefore it is highly recommended that you **change this password after installation**.

Additional accounts used by your internal team to access EPiServer Commerce must have one or more **Roles** assigned to them. A role can be for instance "Catalog Viewers", "Marketing Admins" or "Asset Managers".



EPiServer Commerce users are **internal** to your organization and should not be confused with customers. By default, customers who register from your public site are given the "Everyone" and "Registered" Roles, but these roles do **not** allow access to the administration interface of EPiServer Commerce.

Predefined Roles

A standard installation of the EPiServer Commerce sample site has a number of predefined roles. These roles are based on common e-commerce working procedures and provides a suggestion to how you can work with the system.

EPISERVER COM	MERCE Role List	Welcome, admin
Welcome 🔻 Change Language About	•	🕡 Get Help For This Page 🌲
Customer Management 🛛 🍣	🗋 New 💆 More Actions 🔻	
🗄 🅵 Customer Management	Role Name	
(a) Organizations	Admins	
Contacts	🔲 📷 🗙 Order Managers	
Roles	🔲 📷 🗙 Order Supervisor	
Gircaius	🔲 📷 🗙 Shipping Manager	
	🔲 📷 🗙 Receiving Manager	
	🔲 📝 🗙 Everyone	
	🔲 📝 🗙 Registered	
	🔲 📷 🗙 Management Users	
A Dashboard	🔲 📷 🗙 Administrators	
	🔲 📷 🗙 WebAdmins	
Customer Management	🔲 📷 🗙 WebEditors	
Catalog Management	🔲 📷 🗙 Expert	
💓 Order Management		
Marketing		
Asset Management		
Reporting		
Administration	Page Size: 20 💌	(12 items) Page ∢ 1 ⊧

Each role is associated with a range of permissions on different levels, related to the various parts of EPiServer Commerce.

The following roles are available by default, with a set of permissions for each role:

- Admins default role allowing to fully administer most areas.
- Order Managers this role can create returns and exchanges, view and edit orders, send notifications, process payments and split shipments. You can also allow order managers to manage discounts and/or change the line item price.
- Order Supervisors this role has full permissions for the entire order management procedure, including the entire Order Managers permissions.
- Shipping Manager this role allows for viewing, packing and completing shipments.
- Receiving Manager this role can view shipments and receive returns.
- Everyone assigned when a customer registers an account from the front-end public site.
- Registered assigned when you register from an account from the front-end public site.
- Management Users this role allows users access to EPiServer Commerce.
- Administrators this role has extensive administration rights in areas such as assets, catalogs, core functions, marketing and customer and order management.
- WebAdmins this role is EPiServer CMS specific and provides access to the EPiServer CMS administration interface, needed when administering the content management parts of EPiServer Commerce.
- WebEditors this role is EPiServer CMS specific and provides access to the EPiServer CMS editing interface, needed when working with content on the EPiServer Commerce website.
- Expert this role is used in the EPiServer Commerce sample site for external users that are reviewing products.

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

Content Editors

Access rights for content editors are managed from the **Admin** interface in EPiServer CMS. Here you can view all users and user groups under **Search User/Groups**. Setting access rights for editorial content and

the page tree structure is done from the **Set access rights** section, just as you normally do in EPiServer CMS.

There are the following default roles:

- **Everyone** an anonymous visitor browsing to your website. Can only access the View mode of the website.
- WebAdmins membership in this group provides access to the EPiServer CMS administration interface.
- WebEditors membership in this group provides access to the EPiServer CMS editing interface.

Refer to the EPiServer CMS *user documentation* for more information on how to work with access rights for editorial content.

Dashboard CMS Commerce	Add-ons		episerver 🔇	? 💄 admin 🔍	٤
Edit Admin Reports Visitor Groups					_
Admin Config Page Type Block Type	Search Users/Gro	ups		?	
▼ Access Rights					
Set Access Rights					
Administer Groups	Туре	Groups	•		
Search User/Group	Name				
Create User	Number of hits per page	20			
 Scheduled Jobs 	Number of hits per page	20			
Subscription		🗔 Search			
Publish Delayed Page Versions			Base Alter		
Remove Autosaved Page Drafts	Name		Provider		
Change Log Auto Truncate	Administ	ators	CMSRoleProvider		
Automatic Emptying of Recycle Bin	28 Expert		CMSRoleProvider		
Clear Commerce Cache	20 WebAdm	ins	CMSRoleProvider		
Mirroring Service	- MahEdik		CNODeleBrevider		
Archive Function	. WebEdia	15	CMSRoleFlovidel		
Link Validation	1				
Remove Expired Carts					
Rotate Encryption Keys					
Full Search Index Job					
Subscription Payment Plans Job					
Incremental Search Index Job					
Remove invalid comments					
Remove Permanent Editing					
Serialize Catalog Meta Data Job					
Shipment Release Job					
Tools					
Export Data					
Import Data					
File Management 👻					

As with any EPiServer CMS website, you can work with role and membership providers from Windows or SQL, or both using the multiplexing setting. You can also build your own user and membership provider. Find out more about membership and role provide management in the technical documentation for EPiServer CMS on world.episerver.com.

Globalization

With "globalization" we mean the possibility to **display content** in different languages to website visitor groups with different language preferences. When a visitor to the website selects a language option, the content for that language will be displayed. If content does not exist in a selected language, a fallback procedure may be applied if this has been configured. Another dimension of globalization is the possibility for users to select different language options for the **user interface** inside EPiServer Commerce.

Find out more about globalization and language management in general on a website in the documentation for EPiServer CMS on world.episerver.com. In this section we will describe in more detail how you work with the different language settings in EPiServer Commerce.

Language Settings

Specific Language Settings

In EPiServer CMS there are three different language concepts, two which are defined by ASP.NET (Culture and UI Culture), and one which is the content language. The ASP.NET Culture is referred to as "System Language", and UI Culture as "User Interface Language". A typical culture is "en-US" which defines the language as English (en) with the culturally defined specifics for United States (US).



In EPiServer Commerce, "UI Culture" is used and "English (United States)" is the default language used by the system. This is due to the EPiServer Commerce database which uses "UI culture" in the matching.

Make sure this is set up right from the start to avoid problems later on. It is recommended that only "UI Culture" languages, i.e. "en-US", "en-GB", "nI-BE" etc., are enabled on the website.

Content Language

To display content in the desired language on your website, you may apply the language management options available in EPiServer CMS edit mode, to create pages in different languages. Available content languages are enabled from the EPiServer CMS Admin mode under **Config** and **Manage Website Languages**. For more detailed information on how the language settings work, please refer to the *user doc-umentation for EPiServer CMS*.

Dashboard CMS Commerce Edit Admin Reports Visitor Groups	Add-ons	episerver 🖏 ?	よ admin 🛛 🔍
Admin Config Page Type Block Type System Configuration System Settings Site Information Edit Categories Edit Frames	Manage Website Languages	ile.	(?
Edit Tabs	Move Up Move Down Name	Language Code Enabled System Icon	Template Icon
Manage Website Languages	English	en 🖌 🔤	
Remote Websites	🚹 🦺 English (United Kingdom)	en-GB 🖌 🛃	
Property Configuration	🔒 🤑 English (New Zealand)	en-NZ 🛅	蒂 奇
Edit Custom Property Types	🚹 🦊 English (South Africa)	en-ZA 📔	
Dynamic Properties	🛉 🦺 Deutsch	de 🔳	-
Security	🏠 🦺 français	fr 🚺	
Permissions for Functions	. 🔶 español	es 🔽	5
▼ Tool Settings	A Svenska	sv 🖌 🔚	
Plug-in Manager	A Unorsk	no	12
Change Log Rebuild Name for Web Addresses	🔒 🦺 dansk	da 📒	
Mirroring	🕆 🤑 suomi	fi 🛨	48
Register Web Parts	A Nederlands	ni 🚍	-
Search Configuration	A Nederlands (België)	nl-BE	•
	Português (Brasil)	pt-BR	8
	English (United States)	en-US 🖌 🔛	
	Deutsch (Deutschland)	de-DE 🖌	
	🔒 🕴 Español (España, alfabetización internacion	nal) es-ES 🖌	
	français (France)	fr-FR 🖌	

User Interface Language

To set the user interface language for **EPiServer CMS**, click your **user profile name** in the upper right corner. Select **My Settings** and then the **Display Options** tab. Select the language of your choice in the list, and click **Save**. Note that you may need to refresh the browser window for the changes to apply.

Dashboard CMS Cor	mmerce Add-ons	episerver 🔇 ?	👤 admin 🗸 🔍
 EPiServer CMS My Settings 	My Settings		?
	User Information Display Options Language Settings Personal Language Use system language Dansk English (United States) English Suomi Nederlands Norsk Svenska Deutsch Español Français 日本語(Japanese) Portugués 中文(中华人民共和国) (Chinese (Simplified, PRC))		Save

To set the user interface language for **EPiServer Commerce**, select **Change Language** in the upper menu of the administrative interface. Choose the language of your choice in the list and click **OK** to save you changes.

EPiSERVER COMMERCE Dashboard Home Welcome, admin										
Welcome 🔻 Change Language About	Welcome + Change Language About + 🚱 Get Help For This Page 💠									
Customer Management 🖤	News & Announcements	X Summary								
Customer Management Customer Management Corganizations Contacts Contacts Contacts Contacts Customer C	Start Editing EPIServer 7 content on a mobile device Tue, 06 Nov 2012 20:59:49 GMT Creating a component that searches for content Mon, 05 Nov 2012 15:53:02 GMT EPIServer MVC content rendering – Part 2 Mon, 05 Nov 2012 10:53:73 GMT Partial Routing Mon, 05 Nov 2012 09:12:21 GMT New in EPIServer Find – Unified Search Mon, 05 Nov 2012 11:58:17 GMT New in EPIServer Find – Unified Search Mon, 05 Nov 2012 04:58:17 GMT New in EPIServer Find – Unified Search Mon, 05 Nov 2012 04:58:17 GMT New in EPIServer Find – Unified Search Mon, 05 Nov 2012 13:58:43 GMT	Products: 2779 Categories: 19 Categ								
A Dashboard	Help	× no sales data avail								
Customer Management Catalog Management Catalog Management Catalog Management Marketing Asset Management Reporting Administration	Help will appear in a separate window. Find answers to questions about Commerce Manager containing the terms Examples: Campaigns and Promotions How do I Create a New Product? Where is the release history? Add									

Languages for Catalogs

For products in the product catalog, the language information is set in the product database. EPiServer Commerce will display the product information in the language selected by the website visitor. Languages for the content of a product catalog, are set when you create the product catalog. Find out more about this under *Catalogs*.

Searching

Introduction

The EPiServer platform has a sophisticated search functionality which allows you to search through different types of content on your entire website. You can search for content pages and blocks, document files, community objects and products. The same search function is used in the global search, as well as for sample search page templates and the file manager in EPiServer CMS. The search can be extended to include results from external systems integrated with your website.

The search results will automatically be filtered based on access rights so that users will only see content they have access to. The search service in EPiServer is based on the open source search engine **Lucene**. The service is plug-able which means that Lucene can be replaced by another search indexing provider.

Accessing Search

The underlying search functionality is used by the different EPiServer products, and the description here applies to standard installations of EPiServer products with their respective sample templates. Visitors to the site will usually access the search through a website **search page** with a search field. The search field is also available in the top menu of the website.

From the top global menu, editors and administrators can access the **global search option** in the upper right corner of the page when logged on to the website.

	EPISERVER 🔇 ?	💄 epidemo 🛛 🔍
	Search alloy meet	Search
Blocks	 Alloy Meet teaser - Alloy Meet jumbotro Customer testimonia Alloy Track video Download Alloy Trace Alloy Track teaser - Alloy Plan teaser - Alloy Track jumbotro Alloy Track jumbotro Alloy Track jumbotro Alloy Track jumbotro Customer testimonia 	Alloy Meet on - Some happy p al wide teaser - Sł ck form - Start do. - Alloy Track Alloy Plan on - Alloy Track - Alloy Track Projec al wide teaser - Sł
Pages	Alloy Meet - Alloy n Alloy Meet Campaig Download Alloy Mee Start - Alloy - colla Alloy EU	neetings are easy n et boration, communi

When hovering over a link in the search hit list, information about the page will be displayed, helping you identifying the correct item. Clicking on a link will take you to the item, for instance an web page or a document file.

How to Search

You can search for web pages with a certain name, and you can also search for pages that contain a certain text string. This means that if you cannot remember what the page is called but remember the first lines of the text, then the page can easily be retrieved. It is also possible to search for a page using its ID number, if you know this.

Search Tips

- Enter a sufficient number of search keywords, usually around 6-8 carefully selected words, separated with a space. Start with fewer keywords and if needed narrow your search by extending the number of words. Example: **episerver product project.**
- When searching for specific phrases, you can combine keywords using quotation marks. Example: "episerver search tips".
- The search function is case insensitive, meaning that you can use both upper and lowercase letters. Example: **New York** and **new york** will both return the same result.
- You can restrict the search by placing a plus sign (+) in front of the words that **must** be found to consider the page a match. Example: **+episerver +search +tips**.
- Similarly you can restrict the search by placing a minus sign (-) in front of the words that **must not** occur to consider the page a match, for example **-episerver -search -tips**.
- To match part of a word, place an asterisk(*) at the end of the word. Example: word1* word2 will return content with the words word123 and word2, but not word123 and word234.
- The boolean operators AND and OR can be used. AND means "I only want documents that contain both/all words", OR means "I want documents that contain either word, regardless of which one". Example: **episerver AND search** returns documents with both words, **episerver OR search** returns documents with either **episerver** or **search**.

Displaying Search Results

The items in the search result listing will appear based on the ranking they received from the search algorithm. The display of the search results depends on how this is set up on your website, since this can be customized in many ways. Often some kind of filtering is applied which can be based for instance on categorization of content.

Administering and Configuring Search

The search feature has some administration and configuration options which are managed from the **administration interface** in EPiServer CMS. Refer to the administration part of the *EPiServer CMS user documentation* for more information.

Refer to the *EPiServer Framework SDK* for a technical description of the search functionality, configuration possibilities and the integration interface.

When installing the sample site, Lucene will be the default search provider installed. To find out more about Lucene, refer to the official Lucene website.

Search in EPiServer Commerce

Introduction

The search in EPiServer Commerce is based on the *search functionality in the EPiServer platform*. In an implementation of the EPiServer Commerce sample site, you will notice that, in addition to content pages, blocks and files, products will be included when a search is performed.



The sample site also features *faceted navigation*, a features allowing for advanced filtering of products in the product catalog.

It is possible to replace the Lucene search engine with other search providers. Refer to the *technical doc-umentation* for EPiServer Commerce for more information on how to set up search providers.

Related Information

Refer to the sections listed below for more information on related topics.

- Searching for product catalog entries
- Indexing product catalogs
- Faceted navigation

Sample Site

Introduction

The "Enoteca winestore" sample site is a fully functional B2C and B2B e-commerce solution for a midsize retailer. The templates make use of the built in functionality of the EPiServer platform, and illustrates the many possibilities when creating dynamic e-commerce websites.



Site Structure

When installing the EPiServer Commerce package with a sample site, a number of pages will be created and displayed in a specific structure in the page tree. Some of them will show editorial content. Some pages are used as containers for other pages These will not display any content of their own and will be hidden in navigation menus.

- The home page is built using the **Home** page type. The Home page contains numerous settings affecting the entire website, for instance top menus, search and login. This is also where you define pages to be used for shopping carts, payments and checkout.
- The main menu navigation is built up by the page structure under [Menu]. The products listing is retrieved from the [Resources] section where the **Product Listing** page type which is used for displaying the products, fetching product information from the product catalog.
- The [Functional Pages] section of the site structure holds the display templates for a number of general functions such as Checkout, Login and Create Account. These have their own specific page types linking to functions in the Commerce Manager module.
- Editorial content pages are most often based on the page type **Standard Page**. These are pages where editors can create and edit content the usual way in EPiServer CMS. Examples of editorial content are the pages under the **[Content Pages]** and **[Footer Container]**.

- The [My Profile] section contains display templates for personal settings for online shoppers. Page types used here are for instance My Orders, My Page and Wishlist.
- The [Company Profile] section of the site structure holds display templates related to the B2B part of the sample site. This includes page types such as Company Order Detail, Create Member and Company Page.



Note that some pages will not have a display template for preview, since they are only used as **container pages**. Container pages have a special symbol in the page tree structure. You cannot link to a container page.

Sample Pages

In the following the page templates included in the package are described in more detail, explaining the setup and the possibilities with EPiServer Commerce to both developers and end-users. If you are a developer, you can install Enoteca templates project in your development environment, to explore in more detail how the templates are built.

Page Types

Introduction

Page types contain the **properties** or fields, where editors enter information in a page. Page types will have **content areas** where editors can either type information directly in the area, drag-and-drop pages into the area, or add content **blocks**. When hovering over a content area with existing content, you can see if the content is a block.



Note that this version of the sample site offers only limited possibilities for drag-and-drop of content into content areas. Furthermore, the sample site does not contain any sample block types.

Pages Sites Tasks G Search Root	Home > [Content Pages] > Multiple Deliveries	Changes	s to be published	Publish? ∨ ∷≣	Catalogs Blocks Files G Search Commerce Content R
Home [Menu] [Functional Pa [Footer Contai [My Profile] [Content Pages] Multiple Del Corporate	enoteca Home Wine	This is a Your Local 1 Park Rad Rickmanswoth Herfordshire WD3 IRE • 44 (0)1922 Mixed Cases	terno store. Any orders place Store 3 432603	d through this store will n	Wine Accessories Mixed Cases Mixed Cases Argentina Accessories Argentina
C Terms And Company Pro Company O Create We Edit Member C Members List C Company P	Multiple Deliveries Endeca takes pride in customer s Our locally managed delivery serv change your deliver previourement Most of the time, your local store to you within an absolute maximum of	service vice is fast, convenient and v S. Best of all, you won't have team will be able to get your of 7 days.	ery reliable. And because it's to wait infait day for a courie wine to you within a day or tw	E managed with a human f r. vo of placing your order. I	Chile France Germany Great Britain Greece Hungary Italy
+ ≡- ¢- > Recent	Popular Products O Mixed Cases Fr Red Wines D While Wines O Rose Wines E Top Rated Wines G Our Recommendations	hur Services ree Delivery eleivery And Returns drefing Online mail Newsletter let A Price List	About Us Store Locator Gur Events Contact Us	Support My Account Site Map Accessibility Privacy Policy FAQS Terms And Conditic	Bodegas Mauricio Lorca-2009 [= ^ Bodegas Mauricio Lorca-2010 [F = Finca Filchman-2007 [Finca Filch = Finca Filchman-2008 [Finca Filch = Finca Filchman-2009 [Finca Filch = Finca Filchman-2009 [Finca Filch = = =

Page properties can be edited both through **direct on-page editing** or **forms editing**. However, some properties will only be available for editing through forms editing. Hover over the content area to find out which properties you can edit directly in the page.

The right-hand side pane of the sample site displays the **Product Catalogs**. With this feature it is possible to expand a catalog node to display products, and drag-and-drop a product into the content area of a page.

Note that in this version of the sample site, you can only drag-and-drop products into content areas of the *Home page (start page)* of the site.

Content Editing

The editorial content is mostly added under the **Content** tab in Forms Editing. The specific properties available under the Content tab, will differ depending on the page type. For instance you can have a Main body property providing all the functionality of the EPiServer CMS editor. The **Category** field, used for categorizing the content, is available for all page types.



Sample Page Types

The sample site has a set of page types for specific purposes, with built-in functionality. Available page types on a site can be categorized to make selection easier for editors. Note that not all page types existing on a site may be available for selection in edit mode, and not all page types may be available under a specific node in the page tree. The availability of page types in edit mode can be controlled from the EPiServer CMS administration interface



In the following sections of this documentation we will describe the features and specific properties of the page types included with the sample site. Use these sample pages as inspiration when creating your own pages.

The templates, tabs, fields and functions described in this documentation refers to a "standard installation" of an EPiServer Commerce sample site. The standard functions and fields of EPiServer CMS are not described here. Please refer to the EPiServer CMS documentation for editors and administrators available on world.episerver.com.

Home Page

Introduction

The home page is based on the **Home Page** page type and is normally defined when the website is installed. The page type has no editorial areas, instead most of the content is fetched from other parts of the website. The page type holds a number of settings with references to other pages on the website. The main settings of the home page will most likely not be touched very often after setup of the site. Other parts like special offer advertises and product campaign content may be updated more frequently.

The Home page also has a "carousel" feature where you define a set of images with associated texts and referral links. The *images are selected from the File Manager*, and will replace each other in a continuous slideshow.

Adding Content

Content can be added both through **direct on-page editing** or **forms editing**. However, some properties will only be available for editing through forms editing. When you hover over a content area you can see if it is available for direct editing, and what type of content it is.

Expanding **Catalogs** in the right-hand pane, allows you to drag-and drop specific products into the **Our Favorites** content areas. These can also be *edited through forms editing*.



In the following sections the properties on the various tabs in forms editing will be further described.

Content Tab

Introduction

Below are the properties that can be changed under the Content tab for the Home page in forms editing.

Carousel Feature Properties

The Carousel feature allows you to define a set of four images with associated information.



First/Second/Third/Fourth Carousel Image URL

The link to the carousel image, select an image from the File Manager.

First/Second/Third/Fourth Carousel Tab Name

The text on the tab that will be displayed with each image.

First/Second/Third/Fourth Carousel Caption

The text that will be displayed with each image.

First/Second/Third/Fourth Carousel Promotion Link

The target link when clicking on a carousel image, select a page in the page tree.

First/Second/Third/Fourth Carousel Promotion Link Title

The text for the link to the selected target page.

E + O Q]					
Home				No changes to publish	Options \vee	:=
Name Name in URL Simple address	Home Home Change	Visible to Languages ID, Type	Everyone <u>Manage</u> <u>en-GB</u> , en-US, <u>de-DE</u> , <u>fr-F</u> 5, Home Page	3		~
Display in navigation			Tools 🗸			Ξ
Content Setting	s Favourite Products	External Links	Site Configuration			
Category First Carousel Image	Add one or more categories					
Url First Carousel Tab Name	Mix and match deals					
First Carousel Caption	3 for the price of 2 on all mi					
First Carousel Promotion Link	Mixed Cases 26					
First Carousel Promotion Link Title	See our most popular mixed)				
Second Carousel Image Url	/Global/Images/Carousel/iSt					
Second Carousel Tab Name	20% off select Reds					
Second Carousel Caption	Save on Reds from Merlot to					
Second Carousel Promotion Link	Red Wines 27					
Second Carousel Promotion Link Title	Sample every shade					-

Other Properties

Maximum items in you may also like tab

Set the maximum number of items allowed for the display of "you may also like" items.

About Us age

Provides linking to display content from the About Us page section stored in [Footer Container].

Deliveries Page

Provides linking to display content from the Multiple Deliveries page stored in [Content Pages].

Corporate Page

Provides linking to display content from the Corporate page stored in [Content Pages].

Main Advertise

Provides an editor area for adding editorial content to the main advertisement area at the top of the home page.

Bottom Advertise

Provides an editor area for adding editorial content to the advertisement area at the bottom of the home page

About Us Image

Provides linking to an image to be displayed with the "About Us" section on the home page.



Favorite Products Tab

Introduction

Below are the properties that can be changed under the **Favorite Products** tab for the *Home page* in **forms editing**.

Properties

On this tab you define links to the (four) selected favorite products displayed under "Our Favorites" on the home page. The products are defined using the product link dialog which allows you to chose products from the product catalog. Find out more about this feature in the *Product Picker Property section of the EPiServer Commerce SDK*.

E + ⊙ Q Home]		No changes to publish Options V
Name Name in URL Simple address Display in navigation	Home Home <u>Change</u> Change	Visible to Languages ID, Type	Everyone <u>Manage</u> en-GB, en-US, <u>de-DE, fr-FR</u> 5, Home Page Tools v
Content Setting	s Favourite Products	External Links	Site Configuration
First Favourite Product Second Favourite Product	Click the button to edit		
Third Favourite Product	Click the button to edit		
Forth Favourite Product	Click the button to edit		

External Links Tab

Introduction

Below are the properties that can be changed under the **External Links** tab for the *Home page* in **forms** editing.

Properties

On this tab you define external links to the link selection displayed under "Follow Us" in the footer section at the very bottom of the home page. The links are defined using the ordinary link dialog tool in EPiServer CMS.

te + 💿 🗔			-
Home			No changes to publish Options 🗸 🗎
Name	Home	Visible to	Everyone Manage
Name in URL	Home Change	Languages	<u>en-GB</u> , en-US, <u>de-DE</u> , <u>fr-FR</u>
Simple address Display in navigation	Change	ID, Type	5, Home Page
Content Settings	s Favourite Products Exte	ernal Links	Site Configuration
Facebook Link	http://facebook.com/ .		
RSS Link	http://world.episerver.com/:		
Twitter Link	http://twitter.com/		
YouTube Link	http://youtube.com/		

Site Configuration Tab

Introduction

Below are the properties that can be changed under the **Site Configuration** tab for the *Home page* in **forms editing**. The settings here are common website configuration items that are defined as properties on the start page and will be inherited to the sub-pages. Most often these settings are defined when the website is installed but it may be necessary to update them at some point.

Here you define settings for both a B2C (consumer) and a B2B (company) scenario. Note that the related function pages must be created first before you can define them on the home page.

Open the home page for editing to change the settings for the different properties. For the page links, select the appropriate page in the page tree structure and save and publish the page to update the settings.

Properties

Login Advertise Image

Here you define the image to be displayed to the right in the login page for the site, intended as an advertising space. Select an image in the File Manager.

Link to Login Page

Defines the login page to be used when visitors log in to the website.

Create Account Page Link

This defines the display page for creating an account when a shopper registers to the website.

Product Compare Page

This setting defines the display page to be used when comparing products.

Search Result Page Link

This setting defines the display page for presenting search results on the website.

Shopping Basket Page

This is the page to be used when displaying a shopping basket.

Max. Quantity Of Display Entry

Here you define the maximum number of products to be displayed in a product listing. If you have a large amount of products in specific categories, it might be wise to limit the display number.

My Page Link

This page type displays a snapshot of recent account activities for a customer.

My Wish List Page Link

This setting defines the wish list page to be used when displaying a customers wish list.

Checkout Page

The page to be used when displaying the check out page for a customer.

Order Detail Page

Used for displaying the details for a specific order, when selected from the My Order page.

My Order Page

This page type displays the order history for a specific customer

My Settings Page Link

Here you define the page type to be used for displaying account details for a customer.

Checkout Page for Company User

Used for displaying a checkout page for a company user in the B2B scenario of the sample site.

Company Page

This page type displays a snapshot of recent account activities for a company.

Members List Page

This page type is used for *listing company members*.

Create Members Page

Here you set the display page for *creating a company member*.

Edit Member Page

This page type is used for *editing the settings of a company member*.

Company Order Detail Page

This page type displays the *details of a company order*.

E + • Q]		- -
Home			No changes to publish Options \checkmark 🗮
Name Name in URL Simple address Display in navigation	Home Home <u>Change</u> Change	Visible to Languages ID, Type	Everyone Manage en-GB, en-US, <u>de-DE, fr-FR</u> 5, Home Page Tools V
Content Setting Login Advertise Image	s Favourite Products	External Links	Site Configuration
Link to Login page	Login 17		
Create Account Page Link	Create Account 20		E
Product Compare Page	Product Compariso 😵		
Search Result Page Link	Search Result 22)	
Shopping Basket Page	Shopping Basket 21)	
Max Quantity Of Display Entry	99]	

E + O Q]	•
Home		No changes to publish Options 🗸 🗮
My Page Link	My Page 52 🚳	^
My Wish List Page Link	Wish List 54	
Checkout Page	Checkout 16	
Order detail page	Order Detail 55	
My Order Page	My Orders 51	
My Settings Page Link	My Settings 53	
Checkout page for company user	Company Checkout 😵	
Company Page	Company Page 65	
Members List Page	Members List 64	
Create Member Page	Create Member 62	
Edit Member Page	Edit Member 63	
Company Order Detail Page	Company Order De 🔇	
		-

Each of the page types mentioned here are described in more detail in the following sections of this documentation.

Product Listing

Introduction

The page type **Product Listing** is used for listing product information from the product catalog in Commerce Manager. The listing will be fetched from the selected product category (node) in the product catalog and will display an image of the product together with information about ratings, reviews and social plug-in features.

In the left column of the page it is possible to filter the product display according to a preset product categories. To the right on the page, information related to selected products will be shown. Under the product listing, the recently viewed products are displayed.

The page functionality also includes a product compare option as well as the **Add to basket** button for each product in the list. You can define the number of items to be listed per page, and a pager feature allows for browsing between the listed pages.



Properties

To define a product listing, create a page based on the page type **Product Listing** and select the desired product category (node) in the **Catalog Node name** field. The categories (nodes) available here are retrieved from the [Resources] section in the page tree structure which is set up at installation. This in turn reflects what is defined in the product catalog in Commerce Manager.

In the **Item Per Page** field you can define the number of items to be displayed on each page. The content of the **Bottom Advertise** editor field is displayed at the very left-hand bottom of the product listing page.

E + • Q]	_				
Home > [Menu] > Wine				No changes to publish	Options \lor	:=
Name	Wine	Visible to	Everyone Manage			^
Name in URL	Wine <u>Change</u>	Languages	en-US			
Simple address	Change	ID, Type	7, Product Listing Pag	e		
Display in navigation						
Content Setting	S					
Category	Add one or more categories	+				
Catalog Node	Click the button to edit					
Node Name						
Item Per Page	4					
Bottom Advertise						
	Path:			li.		

Functional Pages

The pages under the **[Functional Pages]** section in the page tree structure of the sample site holds a number of page types with general e-commerce functionality such as login, checkout and search result presentation. These page types are described more in the following sections of this documentation.

Check Out

Introduction

The purpose of the **Check Out** page type is to display the steps of the check out procedure when a customer wants to finalize a purchase. The check out procedure is initiated when the customer selects the **Checkout** option. The checkout procedure may look differently depending on the payment and shipping options defined in the system. On this sample site the checkout procedure has four steps: **Welcome**, **Address**, **Payment** and **Confirmation**.

Step I: Welcome

enoteca	Your Local Store 789 Tincidunt Riliquam erat Yuisque varius Sollicitudin +44 (0)00000789	Register Log in My profile	wbr Your basket 5 item(s) Total: £536.95 Checkout ⊙
Home Wine	Mixed Cases		Popular searches Enter search here
1. Welcome	2. Address 3. Payment	4. Confirmation	
Hello, Have you already got an a register?	uccount with us? Login to use your details. If you	u haven't got an account, why not No thanks, proceed to check-out	

In this first step the customer has the option to either log in or register to the site, or to proceed directly to the next step without registering.

Step	2:	Address

1. Welcome 2.	Address	3. Pay	ment	4. Confirmation
Deliver and Billing Addre	SS			
I. Choose delivery addre	255			
Address Title	Home			
First Name	Mary			
Last Name	Webster			
Company				(Optional)
Email Address	mary@somemail.com			
Phone Number	2345678			
Country	United States			
Postcode	CA 456789			
Address Line 1	111 First Street			
Address Line 2				(Optional)
Town	Sun City			
County				(Optional)
				Edit Address
Choose a delivery op	tion			
Free delivery (2-3 days)		۲	£0.00	
First class delivery (1-2 days)		\bigcirc	£10.00	
Express delivery (1 day)		\odot	£20.00	
2. Choose billing address				
				Different to delivery address 🕟

Here the customer enters name, address and contact details, if these are not already registered in the system. If they are, there will be an option to update the existing information. The available shipping options are selected in this step. It is also possible to chose a different billing address.

Step 3: Payment

1. Welcome 2. Address 3. Payment	4. Confirmation				
Payment					
Amarone della Valpolicella Classico G. Quintarelli, Veneto		Quantity 2	Price £255.35	Total £510.70	
Bardolino Chiaretto DOC, Monte Del Fra		Quantity 3	Price £8.75	Total £26.25	
		Subtotal		£536.9	5 (exc. VAT)
		Shipping cost		£0.0	0 (exc. VAT)
	Order discount			-£0.0	0 (exc. VAT)
		TOTAL	to pay	£536.9	5 (exc. VAT)
Payment Method					
Gift Card		Payment by G	ift Card	(e:	xc. VAT)
		Remain to By one paymer	pay nt method below	(e:	xc. VAT)
			I	Update remain to p	bay O
@ Pay By Phone					
C Pay By Credit Card					
Card number	Name on the card				
Expiry date 1 💌 / 2010 💌	CVV				
Baok					Continue 💽

Here the total order sum is calculated, and the desired payment method is selected. The sample site also has a gift card option where the gift card details are entered and the total sum is recalculated based on this.

Step 4: Confirmation



The final step contains the order confirmation and displays the order number the customer. Also in this step an order confirmation email is sent to the customer.

Properties

The **Check Out** page is created in edit mode and then defined in the *site configuration setting of the start page*. Apart from categories, the page does not have any editable properties.

For more information on different payment providers in EPiServer Commerce, please refer to the *Payment Providers section*.

Login

Introduction

The **Login** page provides a login possibility for both website editors and administrators, as well as registered customers. A user name and password is required. The page has functionality for password recovery. It is also possible to log in to the site using Facebook account credentials.

The Login page is also the entrance for registration of new customers to the site. Clicking on the **Register** option will take the user to the *Create Account* page. To register, a name and email address is needed, together with a user name and a password.

enoteca	Your Local Store 1 Park Road Rickmans worth Hertfordshire WD3 1RE +44 (0)1923 432608	Register Login MyProfile WorYourBasket 0item(s) Total:\$0.00 Checkout •
Home Win	e Mixed Cases	Popular searches 💌 Enter Search Here
Log in or create an Registered Custor If you have an account	account	* Required Fields
Username * Password *	admin Forgot your password?	
Use your Facebook ac	count to log in.	f Connect
New Customers		
Register on our site a New to Enoteca? Take advantage of Enote registering.	nd create your personal profile. ca's fine wine collections, education resources and special e	Register O

Properties

Most of the functionality of the **Login** page is defined in code. However, in edit mode you will find and editor field where it is possible to design a welcome message to new users registering on the site.

Home > [Functional Page: Login	s] >		No changes to publish	Options V
Name Name in URL Simple address Display in navigation	Login Login <u>Change</u> Change	Visible to Languages ID, Type	Everyone <u>Manage</u> en-US 17, Login Page Tools v	
Content Setting Category Invite New Customer	Add one or more categories Add one or more categories Image: Style Image: Style New to Enoteca? Take advantage of Enoteca's fine wine colle Path:	+	special events by registering.	

When created, the Login page must be defined in the site configuration setting of the start page.

Wine Detail

Introduction

The **Wine Detail** page is a "product page", and as such plays a central role on this type of site, since it is used for displaying product details and related information. The page is displayed when a customer selects a specific product, and will display product information from the product catalog of Commerce Manager.

The product information is displayed in the center area, with options for comparing, adding to wish list and buying. Below the product information, any related review or ratings information will be displayed. The rest of the page is built up displaying other information related to the product. The information is selected based on type of product and meta data available in the product catalog.



Properties

The Wine Detail page type is linked to the information stored about the product in the product database. For instance, information such as name, code, catalog image, and display price is collected from the Commerce Manager product catalog. Apart from categories, the page does not have any editable properties.
Compare

Introduction

The **Compare** page type holds functionality for displaying selected products for comparison. For each product you want to compare, you can select the **Compare** option, which will add the product to the Compare page. This page can then be accessed by clicking the **Compare** link/button.

				£11.45
Compare 🚺	Quantity 1	•	Add to Wish list 🚺	Add to basket 🕥

The selected products are listed next to each other together with related product features, for easy overview and comparison. You can compare up to four products at the same time. A product can be removed from the comparison list, or added to the shopping cart or the wish list. The selected products will remain for display on the compared products page until they are removed or a new product selection is done by the user.

Wine SKU		
	Remove 🕲	Remove 🔞
	and the second sec	and the second se
	Barolo, Le Vigne, Az. Agr. Luciano Sandrone, Piedmont	Yarra Yering Dry Red No.2 Shiraz, Yarra Valley, Victoria
	*****	*****
	£117.00	£51.00
	Sandrone's dark ruby-colored 2001 Barolo Le Vigne presents a fantastic nose of flowers, minerais and crushed raspberries followed	Predominantly Shiraz but with smatterings of both Vlognier and Marsanne., both of which imbue a welcome floral note and a touch of
	by generous amounts of very ripe red fruits, mint and eucalyptus	lightness to the meaty, sploy power of the Shiraz. The inclusion of
	Quantity: 1	Quantity: 1
	Add to basket 🜔	Add to basket 🕥
	Add to Wish List 🔘	Add to Wish List 💿
Display Name	Barolo, Le Vigne, Az. Agr. Luciano Sandrone, Piedmont	Yarra Yering Dry Red No.2 Shiraz, Yarra Valley, Victoria
Region		
Margin Percentage	10	10
Color	Red	Red
Style	Italy	Australia
Closure	Cork	Cork
Grape mix	Nebbiolo	Syrah/Shiraz
Alcohol	14	14
Taste	Dry	Dry
Vegetarlans	False	False
Vegana	False	False
Vintage		
SIZe		
Maturity		

Back

Remove all products from comparison 🔞

The **(Product) Compare** page holds no information of its own so it has no editor field. When the product compare page has been created, it must be defined in the *site configuration setting of the start page*.

Create Account

Introduction

The **Create Account** page type provides the possibility to create new customer accounts on the website. Personal and login information such as name, e-mail and password is entered by the user, and there is also an option to sign up for a newsletter.

When the user has agreed to and selected the **Terms and Conditions** option and clicked on **Continue**, a confirmation message will be displayed. The account will be created and the account details are saved in the customer database of Commerce Manager. Later on account details can be updated from the *My Pro-file* option.

Register an account				
Personal details				
Title	Mr	•		
First name	Carlos			
Last name	Santana			
Email address	carlos@somemail.com			
Your login details				
	Onder			
Username	Carlos			
Password	•••••		(min 6 characters)	
Confirm password	•••••			
Newsletter (optional)				
I would like to recieve enot	eca emails 🔽			
Terms and Conditi	ons			
I agree to the enoteca Te⊓	ms and Conditions 🗹			
Back				Continue 🕑

The **Create Account** page holds no information of its own so it has no editor field. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Shopping Basket

Introduction

The purpose of the **Shopping Basket** page type is to display product items that a customer has added to the personal shopping basket. The page can be accessed from several instances, and the **Your basket** view option is always available in the tope menu of the site. The total value is instantly updated when something is added to the basket.



The Shopping Basket page provides functionality for changing the quantity of items as well as removing items from the basket. The **promotion code** option will apply any discount from a selection of related discount options from the system.

Your b	asket - you have 2 item(s) in your basket					
-	Fantasia Torrontes, Bodegas Mauricio Lorca		Quantity 1	Price £10.00	Total I £10.00	Remove
中市	Pulenta, La Flor, Sauvignon Blanc, Mendoza (S	štelvin)	Quantity 1	Price £9.45	Total I £9.45	Remove
	Do you have a promo code?		Enter code	Apply O		
		£0.00 discount awarded in this basket		Subtotal Order discount	£19.45 -£0.00	(exc. VAT) (exc. VAT)
		[x] loyalty points recieved with this purchase. (Log in to use your points)		Company disco	unt -£0.00 £19.45	(exc. VAT) (exc. VAT)
Back				Update basket	Go to cl	neckout 🔘

The "Total" value in the shopping basket display does not include promotions.

When the shopping basket information has been changed, clicking **Update basket** will cause the pricing information to be recalculated based on the new information. Information about loyalty points will also be calculated and displayed on the page. Clicking **Go to checkout** takes the customer to the first step of the shopping completion procedure.

Properties

The **Shopping Basket** page holds no information of its own so it has no editor field. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Search Result

Introduction

The **Search Result page** page type is used for displaying the results of a product search performed on the website. The matching search hits are shown in a listing with product details displayed. From here you have the possibility to add items to the shopping basket, or add items to the wish list. Clicking on an item will display the full product information page.

With the **Refine your search** option in the left column, the search results can be filtered based on categories.



Properties

The **Search Result page** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

For more information on how to search in EPiServer Commerce, refer to the *Search* section of this documentation.

Company Checkout

Introduction

The Company Checkout page is used in the B2B scenario, and is similar to the B2C check out page.

1. Wele	come	2. Address	3. Payment	4. Confirmation
Delive	r and Billing A	ddress		
I. C	hoose delivery	address		
•	Home Line 1			Dispatch to this address
G	United States			Dispatch to this address 🥥
2.0		ldaaa		
2. 0	noose billing ac	laress		Different to delivery address

The **Company Checkout page** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Standard Page

Introduction

The page type **Standard Page** in EPiServer Commerce is used for creating an ordinary information page. On the sample site you will find it for example under the [Content Pages] and [Footer Container] sections of the page tree structure.

Properties

The page type is quite simple and contains a **Heading** and a **Description** field together with an editorial body. The editor toolbar contains the *Product Link tool* for creating links to products.

		-			
Home > [Footer Container Popular Products]	-	No changes to publish (Options 🗸	=
Name Name in URL Simple address Display in navigation	Popular Products Popular-Products <u>Change</u> <u>Change</u>	Visible to Languages ID, Type	Everyone <u>Manage</u> en-US 25, Standard Page Tools v		
Content Setting	S				
Category Heading Description	Add one or more categories Popular Products Donec semper neque quis er) *			Ш
MainBody	Suspendisse ultricles risus eget sem iact velt, vitae hendrerit est ell quie mauris Suspendisse potenti. Vvanuus a odio dui laroreet orci, eget iacuits ligula pretium ao massa loren, vel euismod sem. Vvanuus adipiscing dolor eros sed nulla. Vvanuus semper neque quis erat auctor tempus.	Lis ultricies. Nam imperdiet, nibh ac fr Etiam adipiscing alquam nulla vitae p Donce ultricises errat eu neque viverr I: Donce faucibus aliguam lectus eu v I: conce faucibus aliguam lectus eu v is reugiat, veit vitae tempus consequa iaculis gravida suscipit. Aliquam id pu	ermentum ultrices, sapien ipsum cursu ellenteque. Mauris al placerat augue a ef feugiat ante mollis. In egestas verra. Nulla facilisi. Pellenteque viven (quam turpis accumsan erat. in rus justo, eu aliquet metus. Donec	2	
	Path:			la la	-

For more information on how to work with the editor field, refer to the user documentation for EPiServer CMS.

My Profile Pages

Introduction

In the sample site, the personal user account related information is available from the **My profile** option at the very top of the page when the user is logged in.



The information is contained in a set of pages organized under the My Profile view.



The personal account related pages are stored under the [My Profile] container page in the page tree.

v	Pages	5	Sites	Tasks	
Q :	Searc	h			
	Root				
	🔒 Ho	me			≡•
	H	[Me	enu]		
	H	[Fu	nctional	Pages]	
	•	[Fo	oter Cor	itainer]	
		[My	/ Profile]		
		B	Address	Book	
		Bı	My Orde	rs	
		Bı	My Page		
		Bı	My Setti	ngs	
		BI	Wish List	t	
		Β (Order De	etail	
	•	[Co	ntent Pa	iges]	
	•	[Co	mpany I	Profile]	

These pages are based on specific page types with functionality for extracting personal customer information from the customer management part of Commerce Manager. The page types hold no editorial information of their own. After they have been created, all the pages except Address Book must be defined in the *site configuration setting of the start page*.

Address Book

Introduction

The **Address Book** page holds functionality for adding, displaying and deleting address information for a user account. Multiple addresses can be added, and different shipping and billing addresses can be used. Specific addresses for billing and shipping can be set as default, and will be used in the checkout process.

Address Title	Home	
First Name	Carlos	
Last Name	Santana	
Company		(Optional)
Email Address	carlos@somemail.com	
Phone Number	123456789	
Country	United States	
Postcode	123888	
Address Line 1	1 Main Street	
Address Line 2		(Optional)
Town	Sun City	
County		(Optional)
	Use as my Default Billing Address	
	Use as my Default Shipping Address	
	Save D Cancel O	

The address information is displayed as part of the information under My Profile for the user account.

My Profile			
Address Book My Orders My Page My Settings	Address Book Add new Address		
Wish List	Default Billing Address Carlos Santana I Main Street 123888 Sun City United States 123456789	Default Shipping Address Carlos Santana 1 Main Street 123888 Sun City United States 123456789	
	My Addresses		
	 Carlos Santana, 1 Main Street, Sun Carlos Santana, 1445 Sun Beach La 	City ine, Harbour City	Edit Address 📀 Delete Address 🕄

Properties

The Address Book page holds no editable information of its own.

My Orders

Introduction

The purpose of the **My Orders** page is to display the order history for a user account. The order information is collected from the customer management part of Commerce Manager, and is displayed as part of the information under *My Profile* for the user account.

The Order History overview displays the order ID number, creation date, receiver, and total order amount and status.

Clicking **View Order** will display further order details for the selected order. The options here are described in the *Order Detail* section. Clicking **Reorder** in the Order history view will initiate the creation of the exact same order.

Address Book	Order History					
My Page	Order ID	Created	Ship to	Total	Status	
My Settings Wish List	PO89491	February 15, 2012	Carlos Santana	£1,439.45	InProgress	View Order 🔿 Reorder 🔇

The **My Orders** page holds no editable information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

My Page

Introduction

The **My Page** page provides an overview of the personal account information, with user data and product reviews added by the user. The My Page information is displayed as part of the information under *My Pro-file* for the user account.

My Profile	
My Profile Address Book My Orders My Settings Wish List	Carlos Santana Full Name: Carlos Santana Email: carlos@somemail.com Catlestings • Reviews Avoid this! Wednesday 15 February 2012 This should be avoided, particularly this batch, something went wrong here. Posted in: France Wonderfull Wednesday 15 February 2012 This is a great wine, strongly recommended.
	View all reviews •

Clicking **Edit settings** allows for editing of the account information. The settings here are described further in the *My Settings* section of this documentation.

Edit Account Inform	ation		
Account details			
Title	Mr 💌		
First Name	Carlos		
Last Name	Santana		
Email Address	carlos@somemail.com		
Change Password			
Profile details			
✓ I would like to receive newsletter and offers from Enoteca.com			
Please e-mail me off	ers from third party companies		
Sa	ave 💿 Cancel 🔇		

The **My Page** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

My Settings

Introduction

From the **My Settings** page a customer can update the user name, e-mail address and password for the account. From here it is also possible to sign up for newsletters and third-party information.

Edit Account Information				
Account details				
Title	Mr 💌			
First Name	Carlos			
Last Name	Santana			
Email Address	carlos@somemail.com			
Change Password				
Profile details				
I would like to receiv	e newsletter and offers from Enoteca.com			
Please e-mail me off	fers from third party companies			
Sa	ave 🔿 Cancel 🔇			

The **My Settings** page holds no information of its own. After creation the **My Settings** page must be defined in the *site configuration setting of the start page*.

Wish List

Introduction

The **Wish List** page functionality displays product items in a personal wish list for a customer. The items are added to the list when the customer clicks on the **Wish List** option for a product.

				£11.45
Compare D	Quantity	1 🔻	Add to Wish list 🚺	Add to basket D

The wish list itself is accessed when from the *My Profile* option at the very top of the page.

My Profile					
Address Book My Orders	Wish List				
My Page My Settings Wish List	the second se	Masseto, Tenuta di Ornellaia Marchese Ludovico Antinori The estate's 2007 Masseto is fabulous. Loads of black cherry, blackberry and cassis are intermingled with minerals, violets and French oak. This is an especially sensual Masseto that impresses	Quantity: 1	£394.00 Add to basket	Remove 😵
	Refer to the second	L'Ermita, Alvaro Palacios	Quantity: 1 💌	£427.90 Add to basket	Remove 🔞

Properties

The **Wish List** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Order Detail

Introduction

The **Order Detail** page displays order details for a selected order. The page is displayed when clicking **View Order** from the order history overview on the **My Orders** page under *My Profile*.

The information displayed includes contact details, address and payment information, shipping address and methods, product quantity and price, as well as the total order sum including taxes and any discounts. All of this is retrieved from Commerce Manager, and can only be viewed.

Company Profile

Introduction

In the B2B scenario of the sample site, the **Company Profile** pages are used for displaying account information for a company with associated users. Through a company account, companies can add their employees as users, and deliveries can be shipped to multiple addresses.

As for users in a B2C scenario, the company account related information is available from the **My profile** option at the very top of the page for the company account **administrator** when this user is logged in.

Welcome, Carlos	Log Out My Profile
🖶 Your Basket	
0 item(s) Total: \$0.00	Checkout 💿

The company information is displayed using the *Company Page* page type. Refer to the *Managing Company Accounts* section for more information on how to set up company accounts.

The company account related pages are stored under the **[Company Profile]** container page in the page tree.



Properties

These pages are based on specific page types with functionality for extracting company account information from the customer management part of Commerce Manager. The page types are only used for display and hold no editorial information of their own. After they have been created, all pages must be defined in the *site configuration setting of the start page*.

Company Order Detail

Introduction

The **Company Order Detail** page displays order details for a selected order. The page is accessed when selecting an order in the **Orders** list of the *Company Profile overview page*.

Company Profile							
Order Details - PO15533							
Order Number: P015533 Order Date: 3/19/2012 9:59:50 AM Order Email: mary@somemail.com Status: InProgress							
Billing Address Mary Smith Company XYZ 1 First Street 81818 Hometown United States	Payment Information Method(s): Pay By Phone (Processed)						
Split Shipment - Part 1							
Name		Qty	Pri	ice I	Total Discount	Total	
Ch. Suduiraut, Sauternes						2 £28.00 £0.00 £58.00	

The information here is read-only, it is not possible to update any order information from here.

Properties

The **Company Order Detail** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Create Member

Introduction

The **Create Member** page provides a possibility for the company account administrator to **add members** to be associated with the company account. The Create Member page can be accessed by the company account administrator by selecting the **Create a Member** option in the *Members List page*.

Company Profile		
Create Members		
Title	Ms 🔻	
First Name	Lisa	
Last Name	Jones	
Email Address	lisa@somemail.com	
Username	Lisa	
	•••••	(min 6 characters)
Password		
Commin Password		
	Save O Cancel O	

Enter information in all fields and click **Save** when done. The member will be added to the company account, and will be able to log in with the credentials provided.

Properties

The **Create Member** page holds no editorial information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Edit Member

Introduction

The **Edit Member** page provides a possibility for the company account administrator to edit the settings for an **individual member** of the company account. The Edit Member page can be accessed by selecting the **Edit** option in the *Members List page*.

Company Profile							
Edit Members							All fields are required
				Address Book			
Title	Ms	•		Add New Address			
First Name	Lisa						
Last Name	Jones			Default Billing Add	ress	Default Shipping	Address
Email Address	lisa.jones@mail.c	com		Lisa Jones		Lisa Jones	
Change Password				45 Main Street 681234 Shiptown		45 Main Street 681234 Shiptown	
	Save 🕑	Cancel 💿		123456788		123456788	
					Edit 🔿		Edit 🔿
			1	My Addresses			
				🕀 Lisa Jones, 45 M	ain Street, Shiptown	Edit Address 🚭	Delete Address 🔇

The following information can be edited from here:

- Personal information for the company account member name, e-mail address and resetting of the password. Click Save to update the changes.
- **Default billing and shipping addresses** used by the account member. Addresses can be edited and deleted, and the same information can also be updated by the individual member from the *User Profile pages*.

Properties

The **Edit Member** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Members List

Introduction

The **Members List** page provides an **overview of members** associated with the company account. The list is displayed when the company account administrator selects the **Manage Members** option in the left column of the *Company Profile overview page*.



From the **Members List**, the company account administrator can *create new members* associated with the account, *edit information for existing members*, and **delete** existing members from the account.

Member List			
Create a Member			
	First Name	l ast Name	
	Thist name	Last Name	
Carlos Santana	Carlos	Santana	Edit 🗢 Delete 🔇
Lisa Jones	Lisa	Jones	Edit 🔾 Delete 🔇
Mary Smith	Mary	Smith	Edit 🔾

The company account administrator cannot be deleted from here, this information must be changed by an administrator in Commerce Manager.

Properties

The **Members List** page holds no editorial information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Company Page

Introduction

The **Company Page** provides an overview of information related to a specific company. The page can be accessed by the company account **administrator** when logging in and selecting the **My Profile** option at the top of the page. If the user is a company account administrator, the Company Page will be displayed by default.

Company Profile		
Members		Company XYZ
Mary Smith Member Since: 23 Feb 2012		Business Category: Food & Dining Members: 3
Carlos Santana Member Since: 23 Feb 2012		Edit Settings O
Lisa Jones Member Since: 19 Mar 2012	Orders	
Manage Members O	Monday 19 March 2012 PO28678	0270.00
		2378.00
Members Latest Comments	Monday 19 March 2012 PO26407	
than it actually says on teh bottle, be aware!		£122.25
Carlos Posted In: Italy Monday 19 March 2012	Monday 19 March 2012 PO15533	
GGtry this out Carlos Posted In: Argentina		£233.38
Wednesday 29 February 2012	Monday 27 February 2012	
View All Reviews 🕥	PO17865	£338.89

The page is built up of several sections. On the upper left side, a list of all **members** associated with the company account will be displayed. Selecting **Manage Members** here will display the *Member List page*, from where members and member information can be managed. In the lower left part, product **comments** and reviews added by members are listed.

The top main section displays company account information. Here, the **Edit Settings** option provides a possibility for the company account administrator to edit the account settings.

Edit Company Det	ails	
Company Name	Company XYZ	
Business Category	Food & Dining [No Value] Arts & Entertainment Automotive Business & Professional Services Clothing & Accessories Community & Government	-
Orders	Computers & Electronics Construction & Contractors Education Enod & Dining	
Monday 19 March 2012 PO28678	Health & Medicine Home & Garden Industry & Agriculture Legal & Financial Media & Communications Personal Care & Services	1
Monday 19 March 2012 PO26407	Real Estate Shopping Sports & Recreation Travel & Transportation	

Settings that can be edited are the **Company Name** and the **Business Category** that it belongs to. Select **Save** to save the changes.

The middle part of the page displays a listing of **recent orders** for the company account. The order date, number, and total order sum is shown. Clicking an order number will display further order details using the *Company Order Detail page*.

The **Company Page** page holds no information of its own. When the page has been created, it must be defined in the *site configuration setting of the start page*.

Payment Providers

Introduction

EPiServer Commerce is a flexible platform allowing you to use many of the most popular payment providers within e-commerce. There are a number of payment solutions for different markets available "outof-the-box" for EPiServer Commerce. Some are installed automatically with the EPiServer Commerce sample site, and some are available as separate modules.

Payment Method			
Gift Card			
		Payment by Gift Card	(exc. Tax)
		Remains to Pay	(exc. Tax) by payment method below
			Update "Remains to Pay" 🕥
Pay By Credit Card			
Masterican VISA MARRICAN CORRESS			
Card Number	Name on Card		
Expiry Date 1 V 2010 V	CVV		
Pay By Phone			
O			
Credit on Account			

Payment Providers Available with the Sample Site

When you install the EPiServer Commerce sample site, the payment provider options listed below will be included by default:

- Pay with Gift Card- payment using gift card of certain values and types.
- Pay by Credit Card payment using the most common credit cards.
- Pay by Phone payment method where payment is done by phone.
- Credit on Account credit payment option for a company account.

The following sections of this documentation briefly describes the user functionality for the various payment methods available. Refer to the *EPiServer Commerce SDK* for more information on how to configure and customize the different payment methods.

Gift Card

The **Gift Card** payment provider is available by default in a standard installation of the EPiServer Commerce sample site. This option allows for purchases using gift cards with certain values. When the **Gift** **Card** option is checked, the customer can enter the card number and security code for the gift card to be used.

Payment	Method	
Gift Card		
	Card number	123444555
	Security code	159

The associated gift card value will be calculated, and when clicking Update remain to pay, the total remaining order sum will be calculated.

Gift cards are defined in Commerce Manager under Customer Management. Refer to the *Gift Card Administration* section for more information. Refer to the EPiServer Commerce developer documentation for more information on how to configure the different payment providers available.

Pay by Credit Card

The **Pay by Credit Card** payment provider is available by default in a standard installation of the EPiServer Commerce sample site.

This widely used payment option is used for managing payments for the major credit card providers. The customer enters credit card details such as card number, expiration date, card name and CVV (Card Verification Value) number. The system verifies the card information, and the payment transaction is carried out.

Refer to the EPiServer Commerce developer documentation for more information on how to configure the different payment providers available.

Pay by Phone

The **Pay by Phone** payment provider is available by default in a standard installation of the EPiServer Commerce sample site. This payment method makes it possible to manage payments over telephone. Refer to the *EPiServer Commerce SDK* for more information on how to configure the different payment providers available.

Credit on Account

The EPiServer Commerce sample site has functionality for adding company accounts in a B2B scenario. The checkout procedure for company accounts includes by default the **Credit on Account** payment method, where businesses can pay using company account credit. Refer to the *EPiServer Commerce SDK* for more information on how to configure the different payment providers available.

Faceted Navigation

Faceted navigation is a feature allowing user to quickly navigate through many kinds of filters in product listing, for instance color, price range or taste. The faceted navigation feature is available on the EPiS-erver Commerce sample site when selecting "Wine" or "Mixed cases" in the main menu.



The product listing in the main area will be filtered based on the selections done by the user in the left menu. This offers a powerful way of guiding the user to the desired products in the product catalog. The faceted navigation can be easily customized through configuration, refer to the EPiServer Commerce Developer Guide for more information.

Personalization

Introduction

The personalization feature in EPiServer CMS allows you to create adapted content that will be displayed to targeted **Visitor Groups**. Based on user information collected when visitors access your website, different content will be shown to different visitor groups of your choice. You can for instance display different content to first time visitors and returning visitors on your website. The personalization feature is described in detail in the *user documentation for EPiServer CMS*.

Personalization Criteria for EPiServer Commerce

The EPiServer Commerce sample site features a number of predefined visitor group criteria customized for an e-commerce site where you want to adapt content based on products and order information. Visitor groups can be applied to the various content on your EPiServer Commerce site, thus creating a personalized website visitor experience. The visitor groups and their associated personalization criteria can be accessed by clicking **CMS** in the global menu, and then selecting **Visitor Groups** in the submenu displayed. Or, you can right-click in View mode and select **Visitor Groups** in the EPiServer CMS right-click menu.

The personalization criteria for EPiServer Commerce are available under **Commerce Criteria** when you click **Add** to define visitor groups for your site. The various criteria can then be dropped into the configuration area.

Edit Admin Reports Visitor Groups Create Visitor Group Adapt content on your website by first creating visitor groups and then using the groups to target the content on pages. Criteria Commerce Criteria Match All Commerce Criteria	?
Create Visitor Group Adapt content on your website by first creating visitor groups and then using the groups to target the content on pages. Criteria Criteria Match All Commerce Criteria Contented Reconstruction	?
Adapt content on your website by first creating visitor groups and then using the groups to target the content on pages. Criteria Match All Customer Properties	
Criteria Commerce Criteria	
Drop new criterion here Order Frequency	
Total Spent Product in Cart or Wish Recent Orders	List
Other Information Total Spent Name	
Notes A	
Security role Make this visitor group available when setting access rights for pages and files.	
Statistics 📝 Enable statistics for this visitor group Site Criteria	
Time and Place Criteria	
URL Criteria	
Visitor Groups	
*	

The predefined **personalization criteria** for **EPiServer Commerce** are described in more detail in the following.

Customer Properties Criteria

With the **Customer Properties** criteria you can personalize content based on for instance age and geographic location.

Personalize content based on the following information (select from drop-down list):

- Date of Birth define an age range by entering a from/to date. Select a date in the calendar or enter a date directly in the field (default format mm/dd/yyyy).
- Customer group select one of the existing groups Customer, Partner or Distributor.
- Registration source enter the source of registration in free text format.
- Country select a country from the list.
- Region code select a region code based on the address region in addresses.
- Address postal code based on state selected, select a postal code from the list.
- State select a state from the list.

Only one property type with a related value can be selected for a criterion, but several Customer Properties criteria can be defined for a Visitor Group.

Order Frequency Criteria

With the **Recent Orders** criteria you can identify customers that have placed an order in the store" X" times in the last "Y" days.

Personalize content based on the following information:

- Order times select the number of times an order has been placed.
- Number of days select the number of days.

Product in Cart or Wish List Criteria

With the **Products in Cart or Wish List** criteria you can identify shoppers that have placed a product of a certain type or brand in their cart or on their wish list.

Personalize content based on the following information:

- Specified product code enter the desired product code in free text format.
- Product from a specified category select the desired product category from the list.
- Product has a specified property and value enter the desired product property and value, for instance "brand" and "Sony".

Only one property type with a related value can be selected for a criterion. However, you can add several criteria of the type "Products in Cart or Wish List" to a Visitor group.

Recent Orders Criteria

With the **Recent Orders** criteria you can personalize content for visitors that have placed an order on the site in the last "X" days.

Personalize content based on the following information:

• Number of days - select the number of days.

Total Spent Criteria

With the **Total Spent** criteria you can personalize content for visitors that have spent "X" amount of money (in a specified currency) on the site in the last "Y" days.

Personalize content based on the following information:

- Spent at least select amount and currency.
- Select number of days.

Social Features

Facebook Integration

The EPiServer Commerce sample site has a built-in Facebook integration, allowing users to share "likings" of any product in the product catalog. This is a powerful way to promote the marketing of products in one of the largest social community networks.

	Berrys' St Er	https://www.faceboo	k.com/?api_key=1277600872376108	&ski
- CHURLON	****	f Facebook		
	£ Like			
	Good St Emilic			
	hints of berry	Log in to Face	book to personalize your experience	erience with
	finish with mo	uns social più	ym.	
		Email:		
		Password:		
	Compare		📝 Keep me logged in	
			Forgot your password?	
			5.7.1	
	_			
	Ch. L'Evangi			

A AND COM				
Stand /	V LIKE			
	In 2005 L'Evai	Sign up for Facebook		Log In Cancel
	gorgeous per			
	black cherry a			

Reviewing and Commenting

Customers that are logged on to the EPiServer Commerce sample site have the possibility to add **prod-uct reviews** by providing comments and rate the products. The resulting reviews are displayed for instance in the right-hand section of the page, as well as for each product.

Rece	nt Reviews
And Safe	Chablis, Bougros 'Cote Bouguerots' Grand Cru, Domaine William Fevre This should be avoided, particularly this batch, something went wrong here.
Rader Rader Color	Ch. d'Yquem, Sauternes This is a great wine, strongly recommended. ★★★★★ Read more ●
A Carlos	Barolo, Le Vigne, Az. Agr. Luciano Sandrone, Piedmont Fantastic taste, very versatile. It's AWESOME!

The reviews will be displayed to all visitors to the site regardless of whether they are logged on or not. Only the three latest reviews will be displayed at the same time, with the possibility to see all reviews if desired.

Adding Comments

When selecting a product, there will be an **Add a review** option available where a comment can be added as well as a rating (1-5). A user can rate a product, but only once. The average score of the ratings will be displayed as the rating for that product.

Add a review		
14/24		
write your review		
Try this out!		
This was a great suprise, bought this as a gift to a friend and it turned out to ha wonderful boquet.	ve þa	*
Wine rating (Click on the star to rate the wine) Rating ★★★★	Cancel	0

Logged on users can remove their own comments using the Remove option.

Reviews	Features In
Totally agree! Mary, February 2	2012
Found the same year?	thing, a very strange taste or is it just because of the dry summer this
*****	Remove 🔕
Avoid this! Carlos, Februar	y 2012
This should be a	voided, particularly this batch, something went wrong here.
*****	Report as Inappropriate 🚭
View all reviews C	Add a review 🕥

Approving comments

The sample site is configured so that comments added will receive status "pending" and must be approved by the site administrator before they are made visible to others on the site. The approval is done from the dashboard using the *Approval Gadget*. Commerce Manager administrators can see the status for each comment, and remove all comments, from the display for each product.

Abuse reporting of comments

When logged on to the website, you can abuse report comments that others have posted for a product. This is done using the Report as Inappropriate option on the review section for a product. Site administrators can then monitor inappropriate content using the *Abuse Gadget* on the dashboard. When a comment is reported as inappropriate, it will generate an item in the list of abuse reports for the site administrator to manage.

Experts

The EPiServer Commerce sample site includes functionality for **assigning experts** to be involved in rating and reviewing of products. An expert is someone with thorough product knowledge and trusted by the community. From the Admin mode in EPiServer CMS, website administrators can assign the "Expert" role to registered users on the site. Expert's reviews will be highlighted and will appear in the top of review list.

Dashboard CMS Commerce Edit Admin Reports Visitor Group	Ad	d-ons				EPiserver	۲	?	よ admin	Q	
Admin Config Page Type Block Type	<u> </u>	Edit User	Diaplay Options						?)	*
Administer Groups Search User/Group Create User		Username	Carlos							-	
Scheduled Jobs Subscription Publish Delayed Page Versions Remove Autosaved Page Drafts		Confirm password	Change Password								
Change Log Auto Truncate Automatic Emptying of Recycle Bin Clear Commerce Cache Mirroring Service	E		Active Account locked (too many fa	ailed logon a	attempts)					:	E
Archive Function Link Validation Remove Expired Carts Rotate Encryption Keys		Provider Created date Last login date	CMSMembershipProvider 11/8/2012 2:10:39 PM 11/8/2012 2:16:09 PM								
Full Search Index Job Subscription Payment Plans Job Incremental Search Index Job Remove invalid comments		Bescription			A Member of						
Remove Permanent Editing Serialize Catalog Meta Data Job Shipment Release Job		Administrators WebAdmins WebEditors			Expert	L,	3				
Tools Export Data Import Data	-			 ➡ 							
Product licensed to Dung Le EPiServer AB											÷

Gadgets

A **gadget** is a small application available from the **Dashboard** in EPiServer OnlineCenter and the Assets Pane and Navigation Pane in EPiServer CMS. A number of gadgets are shipped out-of-the-box with each EPiServer product, see the product-specific user documentation.

You can use some of the gadgets with other devices, such as iPhone and iPad.

You can also develop and customize your own gadgets to suit your needs, see *EPiServer Framework SDK*.

Gadgets that are specific for EPiServer Commerce are described in the following.

Commerce Orders Gadget

The **Commerce Orders** gadget displays orders statistics in the form of a sales graph and a list of purchase orders in a time interval of your choice.

Do the following to add and configure the Commerce Orders gadget:

- 1. Log on to EPiServer Commerce and select **Dashboard** in the right-click menu.
- 2. Select the **Dashboard** tab under which you want the gadget to appear.
- 3. Select **Add Gadgets** in top left corner of the dashboard, and then select the **Commerce Orders** gadget by clicking on it in the list. The gadget will be displayed on the dashboard. By default, it will be updated to display new data every 30 seconds.
- 4. To update the refresh interval, select **Edit** in the drop-down menu of the gadget, and enter a new time interval. Click **OK** to save you changes.

When the Commerce Orders gadget has been added to your dashboard, you will be able to easily monitor sales activities for your EPiServer Commerce website.

Commerce Overview Gadget

The **Commerce Overview** gadget shows sales data from the e-commerce system. The data is grouped by products, categories, orders, customers and promotions.

Do the following to add and configure the Commerce Overview gadget:

- 1. Log on to EPiServer Commerce and select **Dashboard** in the right-click menu.
- 2. Select the Dashboard tab under which you want the gadget to appear.
- 3. Select **Add Gadgets** in top left corner of the dashboard, and then select the **Commerce Overview** gadget by clicking on it in the list. The gadget will be displayed on the dashboard. By default, it will be updated to display new data every 30 seconds.
- 4. To update the refresh interval, select **Edit** in the drop-down menu of the gadget, and enter a new time interval. Click **OK** to save you changes.

When the Commerce Overview gadget has been added to your dashboard, you will be able to easily monitor sales data from your EPiServer Commerce website.

Comment Approval Gadget

Users logged on to the sample site can add **comments (reviews)** to products on the site. The **Comment Approval** gadget makes it possible for EPiServer Commerce administrators and editors to manage comments that are left by website visitors. This gadget provides an overview of the commenting status, and you can view, approve or delete comments from here.

Do the following to add and configure the Comment Approval gadget:

- 1. Log on to EPiServer Commerce and select **Dashboard** in the right-click menu.
- 2. Select the Dashboard tab under which you want the gadget to appear.
- 3. Select **Add Gadgets** in top left corner of the dashboard, and then select the **Comment Approval** gadget by clicking on it in the list. The gadget will be displayed on the dashboard.
- 4. By selecting **Edit** in the drop-down menu of the gadget, you can set the number of approval items to display, as well as the length of the description.
- 5. Click OK to save you changes. The gadget will be displayed on your dashboard.

Do the following to use the Comment Approval gadget:

- 1. Log on to EPiServer Commerce and select **Dashboard** in the right-click menu and select the Dashboard tab under which the **Approval** gadget is located.
- 2. You can chose to view all comments, or filter them according to their status **Approved**, **Pending** or **Deleted**. Click **Refresh** to update the list if needed.
- 3. Select one or more comments for which you want to update the status, by clicking the checkbox to the left of each comment. Click the top left checkbox to select all comments displayed in the list.
- 4. Select the status you want to apply **Approve**, **Mark Pending** or **Delete**. For instance, select **Approve** to approve the selected comments.

Comment Abuse Report Gadget

The **Comment Abuse Report** gadget makes it possible for EPiServer Commerce administrators and editors to manage comment abuse reports that have been created by website visitors. This gadget provides an overview of abuse reports, and you can remove selected comments from here.

Do the following to add and configure the Comment Abuse Report gadget:

- 1. Log on to EPiServer Commerce and select **Dashboard** in the right-click menu.
- 2. Select the Dashboard tab under which you want the gadget to appear.
- 3. Select **Add Gadgets** in top left corner of the dashboard, and then select the **Comment Abuse Report** gadget by clicking on it in the list. The gadget will be displayed on the dashboard.
- 4. By selecting **Edit** in the drop-down menu of the gadget, you can set the number of items to display, as well as the number of abuse reports to be displayed for each comment.
- 5. Click **OK** to save you changes. The gadget will be displayed on your dashboard.

Do the following to use the Comment Abuse Report gadget:

- 1. Log on to EPiServer Commerce and select **Dashboard** in the right-click menu and select the Dashboard tab under which the **Comment Abuse Report** gadget is located.
- 2. Select the comments you want to manage by clicking the checkbox to the left of each comment. Click the top left checkbox to select all comments displayed in the list.
- 3. Click **Remove Comment** to remove the comment. Select **Ignore** to leave the comment without any actions.

Commerce Settings for CMO Gadget

Introduction

With **EPiServer Campaign Monitor and Optimization (CMO)** you can measure and monitor campaigns on your website and optimize your landing pages. EPiServer CMO provides a simple way to analyze campaigns and landing pages, rather than whole sites. Find out more about EPiServer CMO in the user documentation on world.episerver.com.

EPiServer CMO can also be used for monitoring activities on an EPiServer Commerce site. You can for instance monitor the number of views or orders for a specific product or product category. The logging of Commerce KPI data is supported using the **Generic KPI** function in CMO. The number of orders is an example of a generic KPI. This allows for external applications such as Commerce to send notifications using a specific application key. The application names and keys are defined in EPiServer CMO, which will then listen for incoming notifications with these specific key values, and collect and store the data.

The following procedure applies when setting up the integration between CMO and Commerce:

- Set up the web services to be used by EPiServer CMO and the corresponding URL to be used.
- Define the external applications, their application names and keys, in EPiServer CMO.
- Define the product views and/or product orders you want to monitor, using the EPiServer Commerce Settings for CMO gadget. Here you will need the application keys and the URL for the CMO Web Services.
- In EPiServer CMO, create a campaign and add the generic KPI for EPiServer Commerce.
- EPiServer Commerce will update the KPI value using web services.
- The monitoring result will be displayed on the campaign report page in CMO, or by using the **CMO KPI Summary** gadget for EPiServer Commerce on the site that has the EPiServer CMO service installed.

Dashboard CMS CMO Overview A/B Tests Campaig	Add-ons		EPiserver	₿?	L epidemo	Q
Settings General	External Applications @					
Data Aggregation Security Page Thumbnails	Save Cancel					
Live Monitor	Application name	Application key	Is used	Edit	Delete	
External Applications	Web Shop Orders	234567		ð	×	
•						

The collected data for EPiServer Commerce is defined in the EPiServer OnlineCenter using the **Commerce settings for CMO gadget**, as described in the following.



To use this gadget you need to have both EPiServer CMO and EPiServer Commerce installed on your website.

Adding the Commerce Settings for CMO Gadget

When you add and configure this gadget, you can choose to monitor activities for a selection of product(s) or order(s).

Do the following to add and configure the CMO gadget for EPiServer Commerce:

- 1. Open the EPiServer OnlineCenter for your website(s) and select Add Gadgets.
- 2. Click on the **Commerce setting for CMO** gadget to add it to your dashboard.
- 3. Click Add to define the monitoring parameters.
- 4. Select Type, choose either Product View or Product Order. The Product View will define views of a product or all products under a specific category (node). The Product Order will define orders for one selected product or all orders of products under a specific category (node).
- 5. In the Product/Category field, choose a product or a category by selecting an option in the tree structure on the left hand, and click Search in the area to the right. Select a product in the search list and click Select. Or, you can select an entire category (node). You can also search directly for a product name or ID. Click Select to add your selection.
- 6. In the Application Key field, enter the application ID (defined in EPiServer CMO).
- In the URL for CMO Web Service field, enter the URL to be used by CMO for the web service (defined in EPiServer CMO).

Editing Commerce Settings for the CMO Gadget

Do the following to edit a set of settings for the CMO Gadget:

- Open the EPiServer OnlineCenter Dashboard, and navigate to the Commerce settings for CMO gadget.
- 2. Click the Edit icon for the settings you want to edit.
- Update the settings information, please refer to the section about adding the Commerce settings for CMO gadget.
- 4. Click **OK** to save your changes.

Deleting Commerce Settings for the CMO Gadget

Do the following to delete the settings for the CMO Gadget:

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

Tools and Plug-ins

In this section we describe a number of tools and plug-ins for EPiServer Commerce. These are for example a plug-in for the EPiServer CMS editor making it possible to select product details directly from the product catalog. The plug-ins described here are all included by default in the EPiServer Commerce sample site.

Product Link Tool

Introduction

The **Product Link Tool** is a plug-in to the EPiServer TinyMCE editor. The tool adds a new function to the toolbar allowing an editor to link content to products in the product catalog in Commerce Manager. When the link is clicked on, the visitor will be transferred to the product page "view mode" for that product.

Adding a Product Link

You can add product links to text, files or images in an EPiServer CMS page or a block.

- 1. In the editor, select the text, files or images where you want to add a link to a product page in the product catalog.
- 2. Select the Insert/edit Product Link tool in the toolbar of the editor.
- 3. When clicking the button in the Select Product field, the product picker dialog will open. When you expand the catalog tree on the left, related products will be displayed. You can browse the structure and select products. The product display can be sorted by clicking on product ID or Name. You can also search for a product by entering free text or product ID. Select a product in the list and click Select.
- 4. In the **Language** field you can choose to select the desired language version for the product page, or let the system decide by selecting **Automatically**.
- 5. Enter the details for the link such as title and target frame, just as you would for any link in EPiServer CMS. Click **OK**.
- 6. The product link will be displayed in the editor.

Home > [Footer Container] > Autosaved 3:04 PM Undo? Changes to be published Publish? Image: Change to be published Publish? Image: Change to be published Publish? Image: Change to be published Publish? Image: Change: Change to be published	t= + • Q]	-	-
Name Our Services Visible to Everyone Manage Name in URL Our-Services Change Languages en-US Simple address Change JD, Type 32, Standard Page Display in navigation Image Image Image Content Settings Image Image Image Category Add one or more categories + Image Ima	Home > [Footer Container Our Services] > Autosaved	3:04 PM <u>Undo?</u>	Changes to be published Publish? V
Content Settings Category Add one or more categories + Heading Our Services Description Ut tellus arcu, bibendum at · MainBody Image: Category Categ	Name Name in URL Simple address Display in navigation	Our Services Visible to Our-Services change Languages Change ID, Type	Everyone <u>Manage</u> en-US 32, Standard Page Tools 🗸	
MainBody MainBody MainBody Language	Content Setting Category Heading Description	S Add one or more categories + Our Services Ut tellus arcu, bibendum at ·	• NOT FOR COMMERCIAL U Product Link Information Link title Oput Target frame Op Link target Select product	ISE - Windows Internet Explorer
pelientesque tempus. Nuiti atorius. Lorem paum doior sit amet, conseq a scelerisque et préum at metus Vivamus sit at met bibliondum igual a neque utificies in. Ut tellus arcu, bibendum at volutpat a, utifices vel odio. Our Best Offer	MainBody	Path: p	Language Au	

EPiServer Commerce supports permanent links, meaning that when a product is renamed the URL will be remembered and will not be broken.

Editing a Product Link

- Select the link and choose the Insert/edit Product Link tool in the toolbar. This will open the Product Link dialog.
- 2. Edit the link options as desired and click **OK** to save your changes.

Removing a Product Link

Select the link and click the **Unlink** tool in the editor toolbar. This will remove the link from the selected text.

The tool buttons in the editor toolbar can be customized, for instance you can change the grouping and orders of the buttons. This is done from the EPiServer CMS administration interface and is described in the *Configuring the HTML Editor section of the EPiServer CMS user documentation*.

Product Dynamic Content

Introduction

The **Product Picker Dynamic Content** function is used for displaying products as dynamic content. In edit view in EPiServer CMS, the editor can use the function to display product information from the product catalog. This adds to the many possibilities with dynamic content, where you can reuse and display content in multiple places on the website, but will only need to update the information in one location.

Adding Product Information as Dynamic Content

Do the following to add product information as dynamic content to a page:

- 1. Open the page for editing in edit view and place the cursor in the editor where you want to add the information.
- 2. Select the Dynamic Content tool in the toolbar.
- 3. Select **Product picker** in the **Select plug-in** field. The product picker fields will appear in the **Settings** section.
- In the Select product field, click the button to select a product from the Commerce Manager product catalog.

The product picker dialog will appear, and you can select a product or a product category by expanding the product category tree, or searching in the search field. Select the desired product and click **Select**.

- 5. The product display template is defined in the **Select display path** (can be changed here if needed).
- 6. Click **OK**. A dynamic content box will appear in the editor. Save your changes and view the result in preview or view mode.

€ + ⊙ Q						
Home > [Footer Container] Our Services	1>	Autosav	ved 3:09 PM Undo?	Changes to be published	Publish? 🗸	:=
Name	Our Services	Visible to	Everyone Manage			^
Name in URL	Our-Services Change	Dynamic Content - Win	ndows Internet Explorer		- • ×	ן
Simple address	Change	Dynamic Content			^	
Display in navigation		Type Description	Product picker Inserts the content of a specified p	▼ product.		
Content Setting	5	Settings				
Category	Add one or more catego	Select product	(The			
Heading	Our Services	Select display path	• •			
Description	Ut tellus arcu, bibendum	Personalization Set	ttings			Ξ
MainBody	😤 🔅 🖃 🗹 🖷 🖸 🔝	No group selected			+	
	B I = 1 Styles	Personalization group groups.	ps are used to group personalized o	content for different visitor groups, or	r no visitor	
	Suspendisse libero odio, sollicitur lacus. Morbi iaculis lectus ipsum, nisl malesuada venenatis. Quisqu Integer dictum yuma ac metus pre-	🔲 Include in a	personalization group			
	sapien euismod pulvinar. Vivamu pellentesque tempus. Nulla facilis a scelerisque et, pretium at metu	As an option, you	can display fallback content to visito	rs not matching a visitor group. To do	0 50.	
	neque ultricies in. Ut tellus arcu, li Our Best Offer	include the fallbac	k content in a personalization group	but leave the visitor group field emp	ity.	
	-					
				ОК	Cancel ?	
	Path: p			ll.		
L		-				-

You can also personalize dynamic content, and display customized information to different visitor groups. Find out more under the *Personalization* section.

Editing Dynamic Content for a Product

Do the following to edit dynamic content for a product:

- 1. Open the page for editing in edit view and place the cursor in the editor where you want to add the information.
- 2. In the dynamic content box, select the Edit option. The product picker dialog will appear, and you

can selected another product or product category. Click **OK** when done.

3. Save your changes and view the result in preview or view mode.

Removing Dynamic Content for a Product

Do the following to remove dynamic content for a product:

- 1. Open the page for editing in edit view.
- 2. Select the dynamic content box and press Delete on your keyboard.
- 3. Save your changes to the page.

Scheduled Jobs

Introduction

A **scheduled job** is a service performing a specific task that can be executed repeatedly at a given time interval or when an administrator manually executes it. When installing EPiServer Commerce there will be a few scheduled jobs added to your website, that are specifically needed for Commerce functions. These scheduled jobs are administered from the EPiServer CMS administration interface. For more information on how to use the EPiServer CMS administration interface, refer to the user documentation for EPiServer CMS.

Administering Scheduled Jobs

Do the following to manage a scheduled job:

- 1. Login as an administrator and navigate to the EPiServer CMS Admin mode.
- 2. Select the desired schedule job under the Scheduled Jobs section of the Admin tab
- 3. Check the Activate check box to activate the scheduled job.
- 4. If you want to run the scheduled job manually, click Start Manually and the job will be executed.
- 5. If you want the scheduled job to be run automatically, set the desired time interval in the **Scheduled job interval** field.
- 6. The time when the scheduled job will be run the next time will be displayed in the **Next scheduled date** field.
- 7. Click Save to save your changes.

Dashboard CMS Commerce Edit Admin Reports Visitor Green	e A	dd-ons	EPiserver	3	?	よ admin	Q
Admin Config Page Type Block Type Access Rights Set Access Rights Administer Groups Search User/Group Create User V Scheduled Jobs Subscription Publish Delayed Page Versions Remove Autosaved Page Drafts Change Log Auto Truncate Automatic Emptying of Recycle Bin Clear Commerce Cache Mirroring Service Archive Function Link Validation Remove Expired Carts Rotate Encryption Reys Full Search Index Job Subscription Payment Plans Job Incremental Search Index Job Remove Permanent Editing Serialize Catalog Meta Data Job Shipment Release Job Shipment Release Job Shipment Release Job		Clear Commerce Cache A scheduled job for clearing EPiServer Commece cache data. Settings History Active Scheduled job interval Next scheduled date 2012-11-08 00:00] day V	 Sa	ve	Start Manu	ally

Under the **History** tab, you can monitor the status and results when the scheduled job has been executed.

Clear Commerce Cache					
A scheduled job for clearing EPiServer Commece cache data.					
Settings History					
Date	Status	Message			
9/10/2012 12:56:21 PM	OK	Cleared Commerce cache data successfully.			

Refer to the section *Default Scheduled Jobs* for more information about scheduled jobs included with EPiServer Commerce.

Default Scheduled Jobs

Introduction

In a sample installation of EPiServer Commerce, a number of **scheduled jobs** will be added to the administration interface of EPiServer CMS. In this section we describe the jobs that are included by default with EPiServer Commerce. Refer to the *Scheduled Jobs* section for more information on how to administer scheduled jobs.

Available Scheduled Jobs

Clear Commerce Cache

When importing or deleting a product catalog, it will be necessary to clean the runtime cache in order to make the website up to date. This is done using the **Clear Commerce Cache** scheduled job. This job can be executed repeatedly at given time intervals, or manually. After the job has been executed, in order to verify that the cache has been cleared, you need to **refresh** the catalog display pages.

Remove Invalid Comments

In EPiServer Commerce it is possible for customers to review a product and add comments about it. When a product is deleted and no longer available in the system, it is also recommended to remove comments associated with the deleted product in order to maintain system accuracy. This is done by the **Remove Invalid Comments** scheduled job. The scheduled job can be executed repeatedly at given time intervals, or manually.

Remove Expired Carts

Shopping carts are created by shoppers from the front-end site, and then converted to a purchase order during the checkout process. Carts that are "abandoned" and not converted into an order, will be stored in the system for a certain time before they expire. The **Remove Expired Carts** job will remove expired carts when executed.

Rotate Encryption Keys

Encryption keys are used for securing sensitive customer data and is set on meta fields. The **Rotate Encryption Keys** job will rotate the encryption keys used by the system. Refer to the *EPiServer Commerce SDK* for more information on encryption.

Full Search Index

The Full Search Index job will perform a full search indexing.

Subscription Payment Plans

Payment plans are used for generate recurring payments, for example for magazine or grocery subscriptions. The **Subscription Payment Plan** job will ensure that these recurring payments are regularly generated as a background process.

Incremental Search Index

The Incremental Search Index job will perform an incremental search indexing.

Serialize Catalog Metadata

The **Serialize Catalog Metadata** job is used for serializing catalog data to speed up the meta data retrieval when searching catalogs.

Shipment Release

The **Shipment Release** job searches for releasable shipments in active orders. If the difference between current time and shipment creation time is greater than the configured time span, the shipment status for the order will be changed to "released".

Defining Display Templates

Introduction

To be able to display different products on the e-commerce site you need to define the display templates to be used. These can be different for different language groups on the site. On the EPiServer Commerce sample site, the display templates will automatically be imported and configured during the installation procedure. However, when new templates have been created you may want to define their use in the system, or modify the use of existing ones. This is done in Commerce Manager in the **Catalog Management** sub-system under **Templates**.

EPISERVER COM	MERCE T	emplates List	Welcome, admin				
Welcome 🔻 Change Language About	e 🔻 Change Language 🛛 About 👻						
Catalog Management 🏻 🍣	New 🎱 More Actions	,					
😑 🛅 Catalog Management	Name Name	Туре	Path				
- 🔍 Catalog Entry Search	Wine Template	entry	~/Templates/Enoteca/DisplayTemplates/WineDetailTemplate.ascx				
Catalog Batch Update	Bundle Template	entry	~/Templates/Enoteca/DisplayTemplates/BundleDetailTemplate.ascx				
🕀 🦳 Catalogs							
🚊 😋 Templates							
English (United States)							
🗀 German (Germany)							
Spanish (Spain)							
French (France)							
Dashboard							
Customer Management							
Catalog Management							
Order Management							
Marketing							
Asset Management							
Reporting	•		III •				
Administration	Page Size: 20 💌		(2 items) Page ∢ 1 ⊧				

Adding a display template

- 1. Under Catalog Management, select Templates and click New.
- 2. In the Name field, enter the name of the display template, for instance "WineTemplate".
- 3. In the Friendly Name field, enter the display name for the template, for instance "Wine Template".
- 4. In the Type field, enter the type of display template, for instance "entry".
- 5. In the **Path** field, add the path to the display template, for instance: ~/Templates/WineStore/DisplayTemplates/WineDetailTemplate.ascx.
- 6. Click **OK** to save your changes.

Updating an existing display template

- 1. Under **Catalog Management**, select **Templates** and the language version and template that you want to update.
- 2. In the Name field, enter the name of the display template.
- 3. In the Friendly Name field, enter the display name of the display template.
- 4. In the Type field, enter the type of display template.
- 5. In the **Path** field, add the path to the display template.
- 6. Click **OK** to save your changes.

Sample Catalog Import

Introduction

The product catalog contains information regarding brands and sales items. This information will either be displayed in the public site, or used for pricing and promotions. Product catalogs needs to be imported into EPiServer Commerce. This will normally be done automatically during the installation procedure for the EPiServer Commerce sample site.

However, there may be occasions where you need to import a product catalog, and the procedure is therefore described in the following. There are different ways of doing this, and in this example we describe how you manually import the sample catalog for the sample site, using the import/export function in Commerce Manager. When product catalogs have been imported, they also need to be **indexed**, in order for the product search function to incorporate any changes.

Additional information on how to import product catalogs can be found in the *Catalog Management* section.

EPISERVER COM	MERCE	Catalog List			Welcome, admin
Welcome 🔻 Change Language About 👻 😧 Get Help F					
Catalog Management 🏻 🍣	🕍 New Catalog 🖉 In	nport/Export 🔹 📓 More Actions 🔹			
😑 🚞 Catalog Management	Name			Available from	Expires
Catalog Entry Search	🔲 🛃 🆄 Wine			9/12/2011 11:11:00 AM	9/12/2021 11:
🗄 🦳 Wine					
🗄 🦳 Templates					
Dashboard					
Customer Management					
Catalog Management					
Order Management					
Marketing					
Asset Management					
Reporting	•	III			F
Administration	Page Size: 20 💌			(1 iten	ns) Page∢1 ⊧

Importing the Sample Catalog

The sample site includes two product catalogs providing the "everything" and the "brand" view.

- 1. In Commerce Manager, select Catalog Management and then Catalogs.
- 2. Click on Import/Export and then Import Catalog, this takes you to the Import Catalog screen.
- Select the catalog zip file, in this case "CatalogExport_Catalog_Wine_Sample.zip" and click Start Import.
- 4. When the import has completed, click Close Window.
- 5. Select "CatalogExport_Catalog_Wine_Sample.zip" and click Start Import.
- 6. When the import has completed, click Close Window.

Import								
lt is strongly recommended that you back up your ECF database before performing import.								
To import catalog, please pick up an existing file from the grid below or upload a new one. Then click the button 'Start Import' to start importing.								
a Add New File								
Files Available For Import:								
Actions		File Name	Size	Created	Last Updated			
Download	Delete	CatalogExport_Catalog_Wine_Sample.zip	742.90 KB	Today, 2:35 PM	Today, 2:34 PM			
1					Page 1 of 1 (1 items)			
Start Imn	ort							
Start imp	ort							
Indexing the Sample Catalog

After importing a product catalog, this also needs to be indexed.

- 1. In Commerce Manager, select Administration, System Settings and then Search Index.
- 2. Click **Rebuild Index** to index the catalog for the first time. The **Build Index** option is used for future updates when you import the same catalog again and only want to index the changes.

EPISERVER COM	MERCE Search Manager Welco	ome, admin
Welcome 🔻 Change Language About	 Get Help For Thi 	s Page 🔶
Administration 🍣	Index	
Administration Administration Common Settings Common	Search Configuration Default Search Provider: LuceneSearchProvider Installed Search Provider: SolrSearchProvider; Solr3SsearchProvider; LuceneSearchProvider; Indexers: catalog (built 11/8/2012 6:27:08 AM); Index Operations Rebuild Index Rebuild the Search Index. This operation will cause complete index rebuild. Build Index Build the Search Index. This operation will build the index for items updated since last build.	E
Dashboard		
Customer Management		
Order Management		
Marketing		
Asset Management		
Reporting		
Administration		-

Managing Content

Introduction

Content on a website can originate from different **sources**, depending on where on the site and by whom it has been created. Content can be created and updated by internal or external editors and marketers, by e-commerce administrators, or by the "shopping community" on the website. On the EPiServer Commerce sample site for instance, shoppers can rate and add comments to products.

Editorial Content

On the EPiServer Commerce sample site, certain parts of the content is editorial, meaning that it will be created and updated by editors or marketers from inside EPiServer CMS. Typically this type of content builds the basic structure of the website and describes the products, the e-commerce company and the services delivered, support and contact information. There can also be newsletters and articles related to products and services delivered.

From the edit view you can work with content, create campaigns and add product information using the *Product Link Tool*, or you can *add product information as Dynamic Content*.

<u></u> = + ⊙ Q						∓ ☆	
Home > [Content Pages] >			Changes to be published	Publish?	~ =	V Catalogs Blocks Files	
Fall Campaign		Di Undo		·	_	Q Search	$\sum_{i=1}^{n}$
Autosaved 3:32 PM Undo?						Commerce Content Root	Â
Name	Fall Campaign	Visible to	Everyone Manag	e		Wine .	- 1
	Fair Campaign	Languages	en-US			Accessories	- 1
Name in URL	Fall-Campaign Change	ID Type	67 Standard P			Mixed Cases	E
Simple address	Change	ib, type	07, Standard Pa	ige		Wine Region	- 1
Display in navigation		- NOT FOR COMMER	CIAL USE - Windows Internet Expl	orer 💷 🗉	3 22	Argentina	
		Product Link				Australia =	
Content Setting	s	Information				Austria	
Category		Link title	Additional This Fall			Chile	
5,	Add one or more categori	Target frame	Open the link in a new wind	ow 🔻		France	=
Heading	Our Best Fall Offers	Link target				Germany	
Description		Select product			<u>n</u>	Great Britain	-
Description	Take advantage of great	Language	Automatically	•	<)	Craiglee Vineyard-2007 [Craiglee Vi =	
MainBody	😤 🚎 🖃 🖬 🕕 🔝 🖣					Craiglee Vineyard-2008 [Craiglee Vi	11
	B I ⋮Ξ ⋮Ξ Styles					Craiglee Vineyard-2009 [Craiglee Vi	E
	Com Deet Offere This		C	K Delete Ca	ancel	Dean Hewitson-2007 [Hewitson Ma	
	Our Best Offers This					Dean Hewitson-2008 [Hewitson Old	
	Product picker					🗧 Dean Hewitson-2009 [Hewitson Mis	
						Dean Hewitson-2009 [Hewitson Ned	
	Additional Offerings					Elderton-2006 [Elderton Command	
						Elderton-2008 [Elderton, Botrytis S	
						Elderton-2009 [E Series, Shiraz/Cab	
	Dealer a					Elderton-2010 [Enoteca's Australian	
	ram, p			1		Elderton-NV [Enoteca's Australian C	
						Frankland Estate-2005 [Frankland E	

Community Content

The EPiServer Commerce sample site offers some interactivity allowing shoppers to review, comment and rate product items. This content which will also be displayed as part of the entire website content, and as a website owner you may like to monitor and approve information created from this source. In EPiServer Commerce this can be done through the *Comment Approval* and *Comment Abuse Report* gadgets.