
Comergent eBusiness System

Release 7.0.2

Tutorial Guide

Sterling Commerce
An IBM Company

Comergent eBusiness System Tutorial Guide

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Preface

Welcome to the Comergent eBusiness System. This Tutorial Guide and the associated documentation provides all the information required for you to manage the Comergent eBusiness System at your site.

This Tutorial Guide provides step-by-step lessons in administering the Comergent eBusiness System. Before reading this guide, you should verify that the system is up and running, and that the system has passed the basic connectivity tests outlined in the *Comergent eBusiness System Implementation Guide*.

Audience

This guide presupposes a reasonable level of information systems knowledge and familiarity with basic network and database concepts. Channel administrators, user administrators, and partner administrators reading this should have a basic understanding of the Comergent eBusiness System before starting their tasks.

Comments

We welcome your feedback. Our aim is to provide our customers with the best quality documentation possible. Let us know about any inaccuracies or missing information in our documentation. We also welcome suggestions for enhancements to our documentation. Our email address is:

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Introduction

The *Comergent eBusiness System Tutorial Guide* is designed as a hands-on introduction to the Comergent eBusiness System. You should also review the following manuals for more information about the Comergent eBusiness System:

- The *Comergent eBusiness System Overview Guide* provides a high-level understanding of the end-user e-commerce experience using Comergent as well as how that end-use experience is achieved.
- The *Comergent eBusiness System Administration Guide* provides you with a more detailed description of the concepts involved in administering the Comergent eBusiness System as well as step-by-step descriptions of each task involved.

The *Comergent eBusiness System Tutorial Guide* is designed to provide you with a practical, hands-on approach to administering the system. The guide takes you from starting with a minimally populated Knowledgebase, through the creation of a product catalog and price lists, to the creation of several partners and their partner users. In the final lesson, you will log in as these partner users to experience how all these entities work together to achieve the end-user experience.

What this Guide Contains

This Tutorial Guide concerns a fictional company called **Matrix Products** which makes primarily computer products and accessories. In general, you will be the

enterprise administrator for this company and will create the business infrastructure which enables **Matrix Products** to do business in the world. You will create the products and set manufacturer's prices for the products. You will create the partners with whom you do business: the distributors, resellers, the retailers, and the OEMs. Occasionally, to do some administration, you will become a partner administrator. Occasionally, you will log in as one of the partner users, created by the partner administrators, to participate in the Comergent eBusiness System end-user experience.

LESSON 1, "Enterprise Users and Their Functions"

In this lesson, you will create the enterprise users who can administer the enterprise site. By assigning various roles to the users you create you will visibly see how you can grant access to the various applications within the Comergent eBusiness System.

LESSON 2, "Creating Simple Products"

You will learn the concept of a root category, as well as how you create a product catalog structure of product categories and nested product categories beneath this root. You will create simple products within this structure.

LESSON 3, "Setting Prices for Products"

Once you have created the products, you will learn how you use price lists to set prices for these products. You will also learn that price lists are the link between partners and the products.

LESSON 4, "Creating Partners, Partner Administrators, and Partner Users"

In this lesson, you will create profiles for your partners. You will experience the importance of creating a partner administrator. You will log in as a partner administrator so that you can create the partner users for each partner.

LESSON 5, "Bringing Partners and Products Together"

In this lesson, you will experience how all the entities you have created until now come together. You will see how a product catalog is nothing until the products are assigned to a price list, how the product catalog is still nothing until the price lists containing the products are assigned to partners.

LESSON 7, "The End User Experience"

In this lesson, you will experience what your end-users experience based on everything you have done so far. You will log in as one of the partner users you

created in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users". You will add a product to a product inquiry list, then when you process the list, you will place an order as an end-user does.

Requirements for Running This Tutorial

To run this tutorial, you must do the following:

- Install a non-customized copy of the Comergent eBusiness System for the specific purpose of running this tutorial.
- Populate the knowledgebase with the minimal data set.

For information about installing Comergent and populating the Knowledgebase, refer to the *Comergent eBusiness System Implementation Guide*.

You must know the URL used to access the Comergent eBusiness System. It will be something like:

<http://commerce.company.com/Comergent/en/US/enterpriseMgr/matrix>

However, the first part of the URL will depend on your network environment. When we give examples of URLs in this *Tutorial Guide* be sure to modify them to suit your environment.

What You Need to Know

This tutorial is designed to give you hands-on experience of the tasks and concepts described in the *Comergent eBusiness System Administration Guide*. You should read and understand the concepts described in the following chapters in the *Comergent eBusiness System Administration Guide*:

- Chapter 1, "Introduction"
Read the following sections:
 - "Users, Roles, and Functions"
 - "Managing the Sales Channel"
 - "Setting Prices for Products"
- Chapter 2, "Introduction to Product Administration"

Read the first section, "Administering the Product Catalog".

In the first lesson, you will create a series of enterprise users and assign various functions to each. You will see how the functions assigned to users determine the tasks and objects to which the users have access.

Creating an Enterprise User

1. Point your browser to the URL where the copy of the Comergent eBusiness System is installed for this tutorial. Determine from your system administrator the correct URL for this tutorial. It will be something like:

`http://commerce.company.com/Comergent/en/US/enterpriseMgr/matrix`

In a typical, out-of-the-box installation, the browser displays the Matrix home page as shown in Figure 1 on page 6. In this case, you would click **Administration**.



FIGURE 1. Matrix Home Page

2. Log in to the Comergent eBusiness System as the **admin** user (password: **admin**).

FIGURE 2. Logging In as the admin User

When you load minimal data, one enterprise user, the **admin** user, is created in the Knowledgebase. Initially, this user has access to only a limited part of the system; however by assigning additional functions to the user, you can add all the functionality that you will need for this tutorial. By logging in as this user, you can add the enterprise users you will need and assign them the necessary roles.

When you log in as the **admin** user, the Enterprise Home Page appears (Figure 3 on page 7). Each link represents access to a particular part of the Comergent eBusiness System.

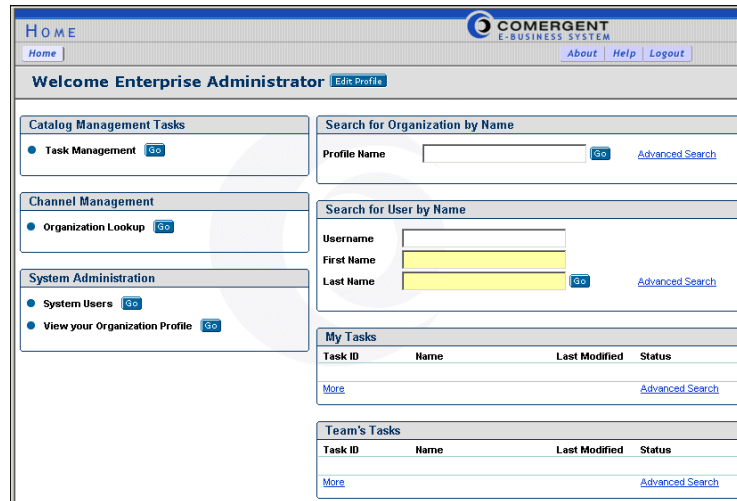


FIGURE 3. Enterprise Home Page as seen by the admin User

3. Click **Go** next to System Users.



FIGURE 4. User List Page

Notice that there are only two users: the **admin** user and the **ERPAdmin** user. The **ERPAdmin** user will not be used for this tutorial. In the Functions column for the Admin user, the function assigned is Profile Administration.

4. Click **Create User** to display the User Detail page.

FIGURE 5. User Detail Page

5. Create a user using the following information:

TABLE 1. User Information

Field	Value
Username	ajones
Password	ajones
First name	Alison
Last name	Jones
Email	<i>Enter your email address</i>
Functions	<i>Leave all unchecked</i>

FIGURE 6. User Detail Page

Use **ajones** as both the Username and Password. Notice that no functions are selected. In this case, do not select any functions for the time being. See the *Comergent eBusiness System Administration Guide* for a description of the other required field.

6. Click **Save**.
7. Click **Logout**.
8. Log in as **ajones** (password: **ajones**).

The administration home page appears as in Figure 7 on page 10. Compare this home page with the enterprise home page that appeared when you logged in as the **admin** user (Figure 3 on page 7). Notice that you do not have the Team's Tasks panel: this is because ajones is not a manager.

Access some of the applications by clicking on the links. You will notice a user with no extra functions can perform only limited actions, and in most cases is limited to a read-only environment.

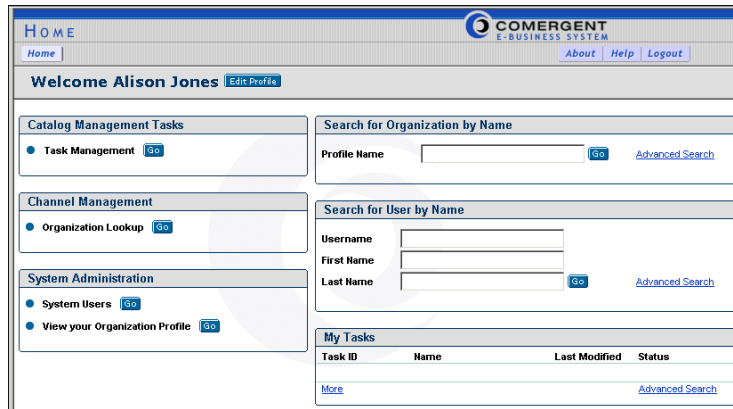


FIGURE 7. Enterprise Home Page as seen by the ajones User.

Assigning Additional Functions

You want **ajones** to act as an enterprise administrator for **Matrix Products**. That is, you want Alison Jones to be able to create users and, in general, to have all the privileges of the **admin** user.

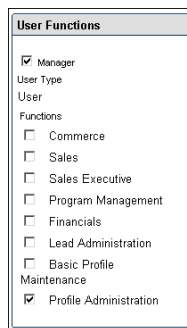
1. Click **Logout**.
2. Log in again as the **admin** user (password: **admin**).
3. Click **Go** next to System Users.
4. Click the link for **ajones**.

Now give **ajones** the same functions as the **admin** user (Figure 8 on page 11):

- Profile Administration

Check the Manager check box

From here on, you will use **ajones** to create the enterprise users you need.



User Functions	
<input checked="" type="checkbox"/>	Manager
User Type	
User	
Functions	
<input type="checkbox"/>	Commerce
<input type="checkbox"/>	Sales
<input type="checkbox"/>	Sales Executive
<input type="checkbox"/>	Program Management
<input type="checkbox"/>	Financials
<input type="checkbox"/>	Lead Administration
<input type="checkbox"/>	Basic Profile Maintenance
<input checked="" type="checkbox"/>	Profile Administration

FIGURE 8. User Detail Page: Adding Functions

5. Click **Save**.
6. Click **Logout**.
7. Log in again as the **ajones** user (password: **ajones**).

Notice that the access for **ajones** has changed. **ajones** now has access to the same applications as in Figure 3 on page 7.

Creating Additional Enterprise Users

Still logged in as **ajones**, you will create two enterprise users:

- Dinah Morris
Dinah Morris needs to monitor orders and returns, so she must have access to the right applications to do these things.
 - Brent Willow
Mr. Willow is in charge of modifying business rules.
1. Click **Go** next to System Users.
 2. Click **Create User** to display the detail page.

3. Enter the information for Dinah Morris:

TABLE 2. Dinah Morris User Information

Field	Value
Username	dmorris
Password	dmorris
First name	Dinah
Last name	Morris
Email	<i>Enter your email address</i>
Functions	<i>Check Commerce</i>

4.

Home About Logout Help

Create New User

Info

Belongs to: Enterprise Cancel Save

NOTE: (*) Items are required.

User Information

Username* dmorris

Password* dmorris

Confirm Password*

Title Ms.

First name* Dinah

Last name* Morris

Job Title

User Locale

Preferred Locale United States

Note: changes to Preferred Locale will take effect on the next login.

Away

User Functions

☐ Manager

User Type User

Functions

☒ Commerce

☐ Sales

☐ Sales Executive

☐ Program Management

☐ Financials

☐ Lead Administration

☐ Basic Profile Maintenance

☐ Profile Administration

FIGURE 9. User Detail Page: Dinah Morris

5. Click **Save**.
6. Click **Logout**, then login again as Dinah Morris (username **dmorris**, password: **dmorris**).

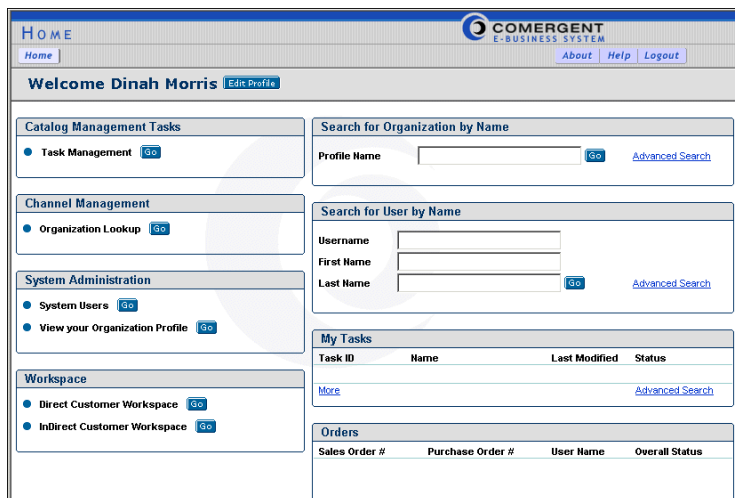


FIGURE 10. Enterprise Home Page as seen by Dinah Morris

Notice that the enterprise home page appears nearly the same as when you logged in as **ajones** with only the User role assigned (Figure 7 on page 10). The difference is that now there are links to two workspaces, and new panels for some basic commerce objects: Orders, Returns, Quotes, and Requests for Quotes.

7. Click **Logout**, then login again as Alison Jones (username **ajones**, password: **ajones**).
8. Click **Go** next to System Users.
9. Click **Create User** to display the detail page.
10. Enter the information for Brent Willow:

TABLE 3. Brent Willow User Information

Field	Value
Username	bwillow
Password	bwillow
First Name	Brent
Last Name	Willow
Job Title	Business Rules Manager

TABLE 3. Brent Willow User Information

Field	Value
Email	bwillow@matrix.com
Department name	Information Systems
Department description	Information Systems
Business Phones	(408) 555-1214
Functions	Check Program Management

11. Click **Save**.
12. Click **Logout**, then log in again as Brent Willow (username **bwillow**, password: **bwillow**).

FIGURE 11. Enterprise Home Page as seen by Brent Willow

Notice that the Enterprise Home Page for Brent Willow gives him access to most of the links Alison Jones has access to. By accessing these applications, you also notice that, because you assigned him the Program Management function, he can also perform actions in other components of the Comergent eBusiness System. In addition, Brent has access to the Business Rules and System Services: together these components determine how the Comergent eBusiness System is configured.

13. Click **Logout**.

Exercises

- Log in as the various users you created in this lesson. See the kind of privileges the various functions give them.
- Log in as Alison Jones again. This time, see what entitlements the other functions provide, the functions not assigned in this lesson. For example, assign one of the users only the Program Management function, then see what capabilities this assignment gives the user.

Creating Simple Products

Now that you have created a number of enterprise users with the appropriate functions to perform their tasks, you can begin creating the products that will form the product catalog. For the purposes of the current tutorial, you will create some simple products.

Creating Product Categories

As described in the *Comergent eBusiness System Administration Guide*, a product catalog comprises multiple product categories, each of which contains one or more individual products. The first step in creating a product is to find the product category in which you want to locate the product. If the category does not exist, then you must create the category.

In this part of the lesson, you will create five categories:

- **Computers** (which comprises two nested categories: **Desktops** and **Workstations**)
- **Software**
- **Monitors**
- **Accessories**
- **Memory**

For the purposes of this *Tutorial Guide*, you will create products only in the **Desktops** and **Workstations** categories.

1. Log in to the Comergent eBusiness System administration page as the **bwillow** user (password: **bwillow**) you created in LESSON 1, "Enterprise Users and Their Functions".

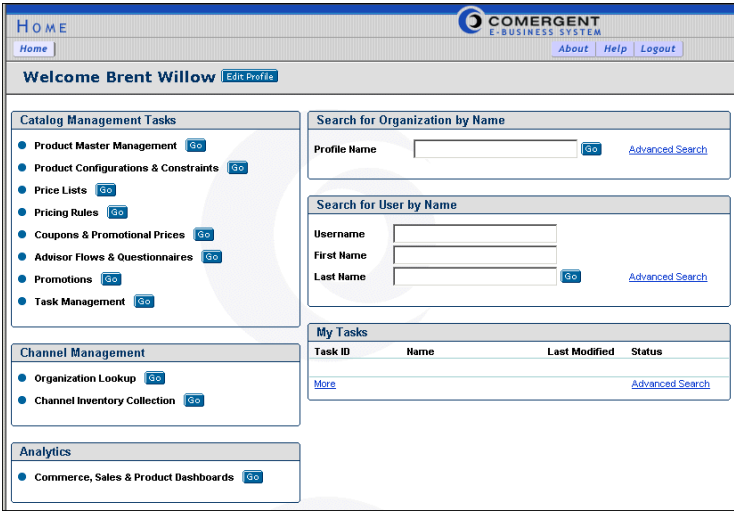


FIGURE 12. Enterprise Home Page

2. Click the **Go** next to Product Master Management.

The Product Manager page appears (Figure 13 on page 19), displaying the Catalog Management tab. You will use this tab to create your product categories.

Notice the left-hand, "Product Category" frame, with its root product category. Normally, when creating a product category, you would navigate the product category structure to find the location where you want to create the category. However, in this tutorial, you will create the first category as a child of the root category. Later, you will create nested categories within the category you create.

Notice also that the Child Product Categories list box in the right-hand frame currently displays no children.

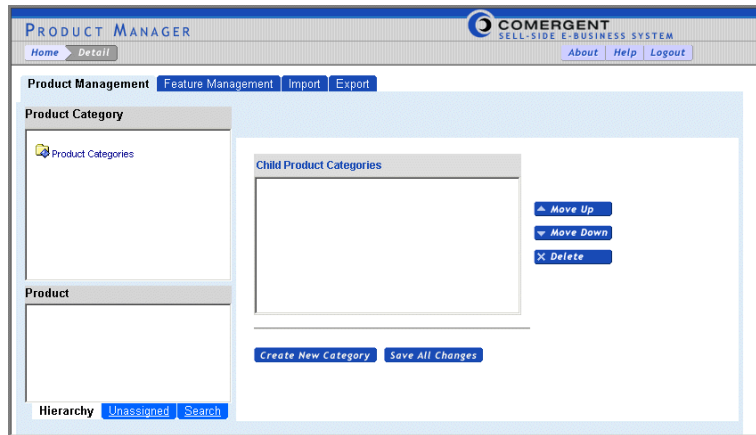


FIGURE 13. Product Manager Page

3. Click **Create New Category**.

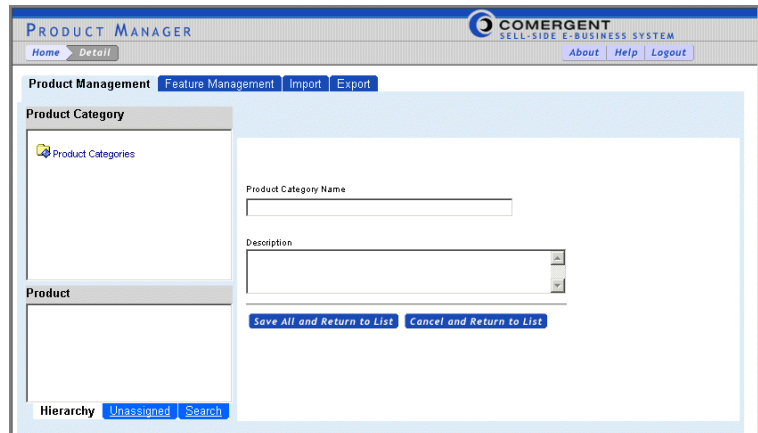


FIGURE 14. Creating a New Category

4. In the Product Category Name field, enter the name of the product category: Computers.
5. In the Description field, type a short description.

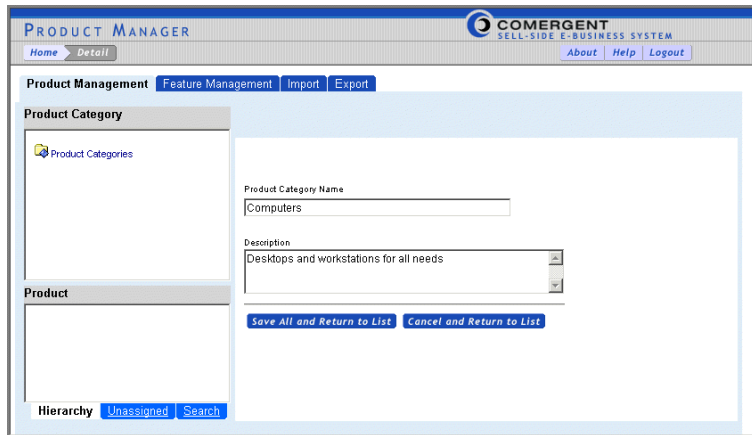


FIGURE 15. Name and Description

6. Click **Save All and Return to List**.

The **Catalog Management** tab is re-displayed (Figure 16 on page 20). Notice that the Child Product Categories list box shows a new child category: Computers. In the left-hand, Product Category frame, notice also that a new category, Computers, is displayed below the root category.

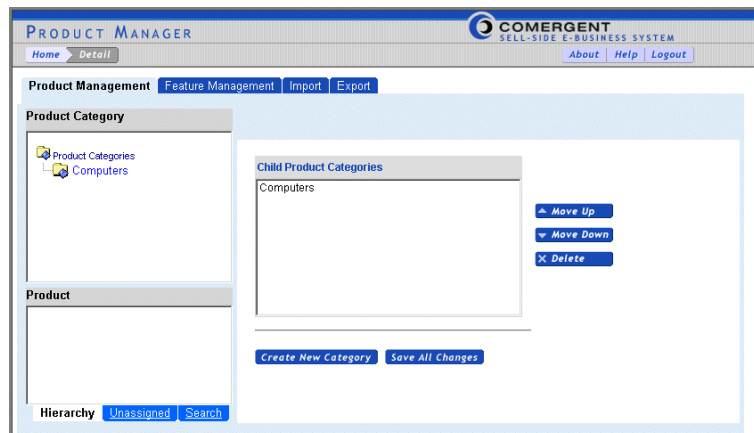


FIGURE 16. New Child Product Category

7. Click **Create New Category**.

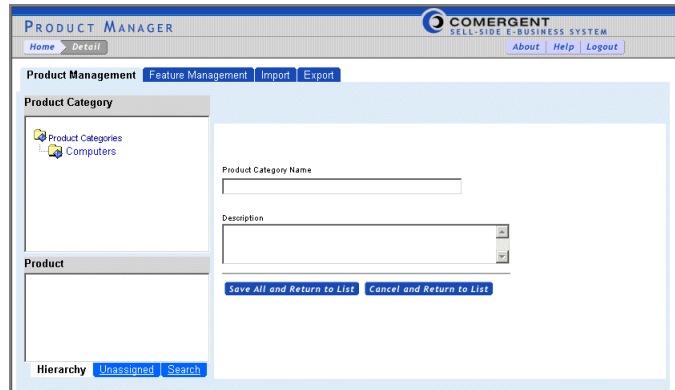


FIGURE 17. Product Management Tab For New Category

8. Enter the name (Software) and a short description.

9. Click **Save and return to list**.

The Catalog Management tab is re-displayed (Figure 18 on page 21) showing a new child (Software) in the Child Product Category list box as well as in the Product Category frame. Notice that, in the Product Category frame, the new category is under the root category.

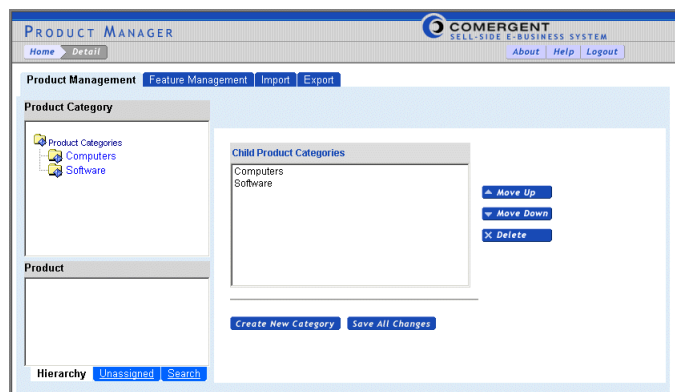


FIGURE 18. Product Management Tab Showing New Category

Creating Nested Categories

In the next steps, you will create two categories, Desktops and Workstations, as children of the Computers category. To create categories within another category, you must first find the category in the left-hand, Product Category frame, then select it.

1. Find and click the Computers category in the left-hand, Product Category frame.

In Figure 19 on page 22, notice how the tabs in the right-hand frame have changed. The General tab displays the name and description you gave to the new category.

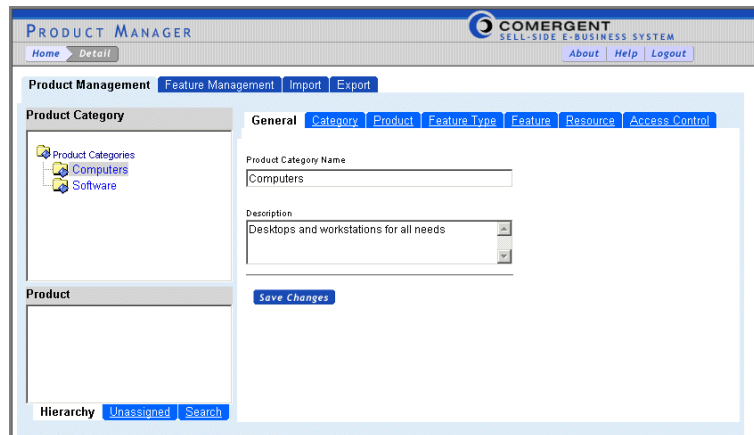


FIGURE 19. Computers Category Selected in the Product Category Frame

2. Click the **Category** tab.

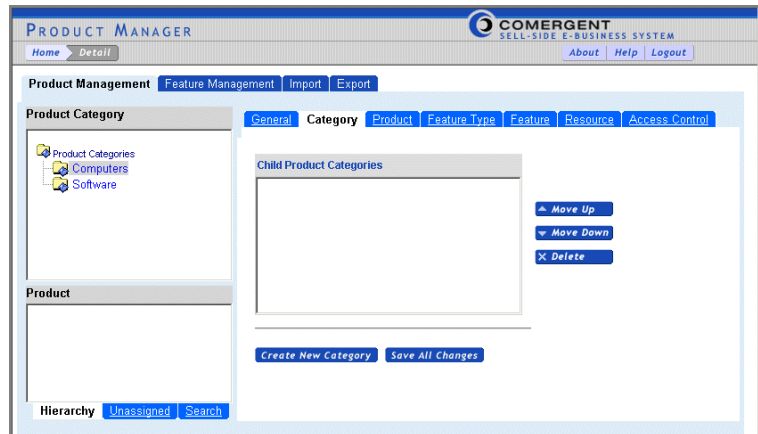


FIGURE 20. Category Tab

This tab resembles the tab displayed for the root category (Figure 14 on page 19). Notice the empty Child Product Categories list box.

3. Click **Create New Category**.

The Category tab is re-displayed with the fields for creating a new category.

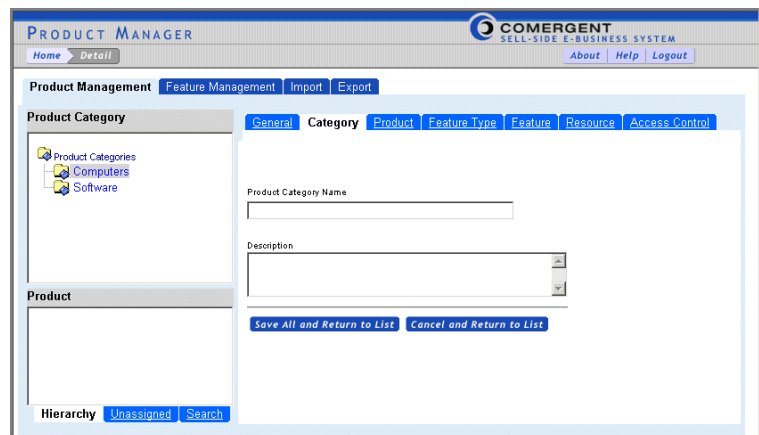


FIGURE 21. Category Tab for a New Category

4. Enter the product category name (Desktops) and a short description.

5. Click **Save All and Return to List**.

The Category tab is re-displayed (Figure 22 on page 24) showing a child (Desktops) in the Child Product Category list box. Notice that there is a plus (+) next to the Computers category in the left-hand frame.

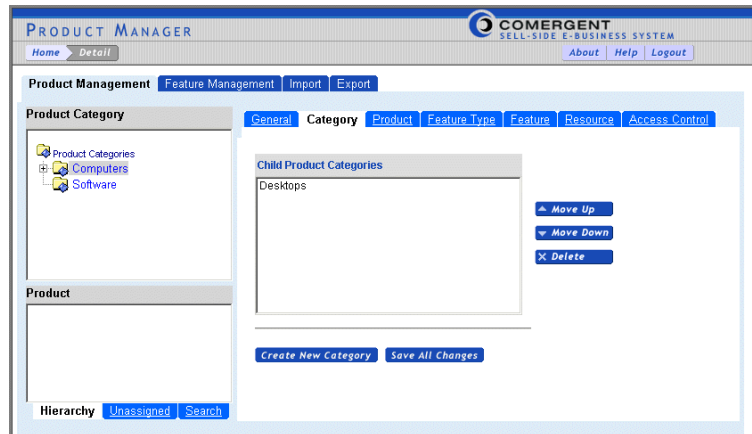


FIGURE 22. The Category Tab Showing a New Child Category

6. Repeat Step 3 through Step 5 to create and save the second nested category. For the product category name, type Workstations; for the description, type Workstation Computers.

Once you have saved the new category, the Category tab is re-displayed. Notice there is a new child (Workstations) in the Child Product Categories list box.



FIGURE 23. The Category Tab Showing a New Child Category

7. Click the plus (+) next to the Computers product category in the left-hand Product Category frame. Notice that there are now two nested categories within the Computers category.

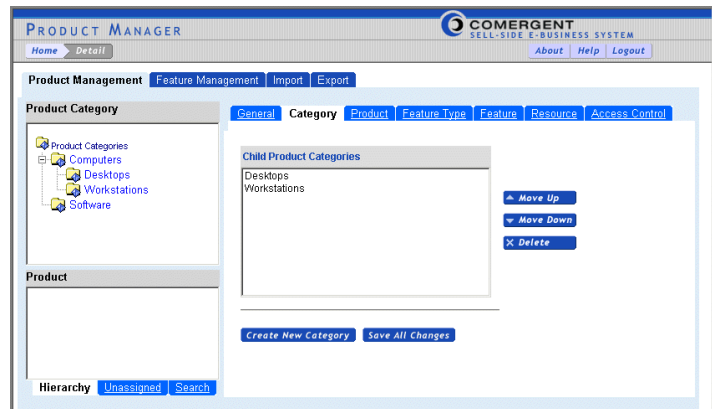


FIGURE 24. Product Category Frame Showing New Nested Categories

Notice also the position of the other categories. Computers is aligned under the root category while Desktops and Workstations are indented under Computers, showing that they are children of the Computers category.

Exercises

- Create three more categories (Monitors, Accessories, and Memory) as children of the root category. When you have completed this task, the Product Manager page appears as in the following figure.

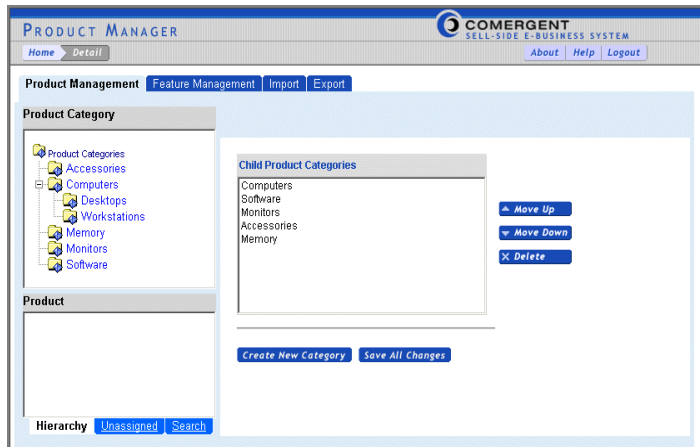


FIGURE 25. Product Management Tab

- Click on one of the new product categories. Then click on each of the tabs (**Category**, **Product**, etc.) and familiarize yourself with their content. Their use will be explained in later lessons. See the *Comergent eBusiness System Administration Guide* for a detailed explanation of these tabs.

Creating The Desktop Products

After you complete the steps in "Creating Product Categories" on page 17, you will have the product category structure you need for the rest of the lesson. In this section, you will create the products that will populate the Desktops category:

- Matrix7490 Desktop
- Matrix7510 Desktop
- Matrix7520 Desktop
- Matrix7540 Desktop

- Matrix7600 Desktop
- 1. Log in to the Comergent eBusiness System administration page as the bwillow user (password: bwillow) you created in LESSON 1, "Enterprise Users and Their Functions".
- 2. Click the **Go** next to Product Master Management.

This displays the Product Manager page showing the root category, along with the categories you created in the last section.

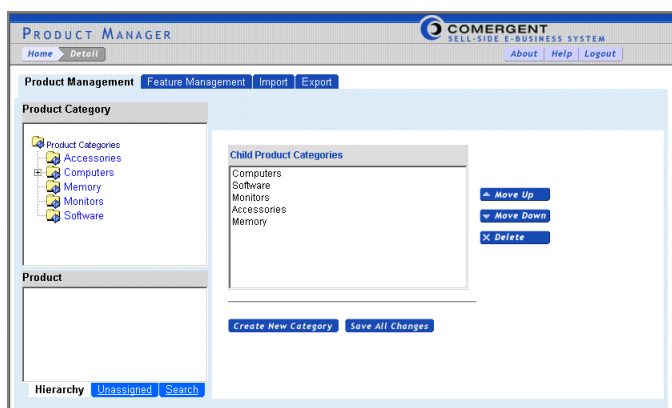


FIGURE 26. The Product Management Tab

You must either select a category within which to create the product, or you must create an unassigned product, that is, a product that is not assigned to any category. For the moment, the products you create will be assigned to a selected category.

The first product you will create is for a desktop computer product, so you want to find the Desktops category. As you remember from "Creating Product Categories" on page 17, this is one of the nested categories you created within Computers.

- 3. In the left-hand Product Category frame, click the node next to Computers.
This displays the nested categories you created in the previous section.
- 4. Click the node next to Computers to expand the list of categories belonging to this category.
- 5. In the Product Category frame, click on Desktops.
This displays the tabs for the nested category, Desktops.

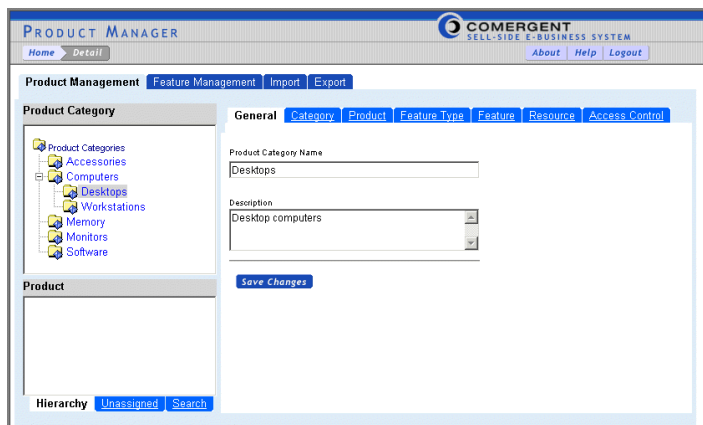


FIGURE 27. The Product Management Tab with Tabs for Desktop Category

6. Click the **Product** tab.

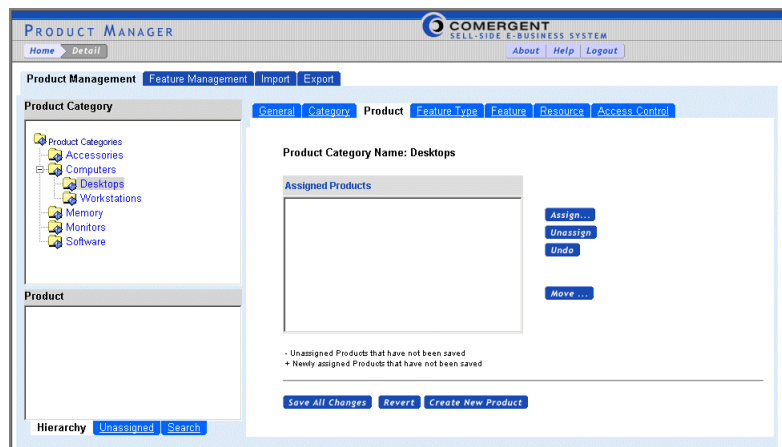


FIGURE 28. The Product Management Tab with Product Tab

7. Click **Create New Product**.

The **Product** tab is re-displayed with the fields for creating a new product.

FIGURE 29. The Product Tab with New Product Fields

8. Enter a Product ID, Product Name, and Description for the new product, as shown in the following table.

TABLE 4. Matrix 7490 Desktop

Product ID	Product Name	Description
MXDS-7490	Matrix 7490 Desktop	The Matrix 7490 Desktop comes standard with an Intel Pentium III Processor 866MHz, 192MB RAM, 10GB hard drive, 40X CD-ROM drive, 16MB nVidia TNT2 M64 graphics card, and a 15" Monitor.

The Product ID, the Product Name, and the Description that you enter here are displayed to end-users when they browse your product catalog. In addition, the Product ID uniquely identifies the product throughout the Comergent eBusiness System.

9. Select the Component Type as Normal.

Comergent has three component types: Normal, Configurable, and Assembly. Normal is the simplest product you can create.

10. Enter a Start Date (the current date) and an End Date (a date five years from the current date).
11. Select Released from the **Status** drop-down list.
12. Click **Save and Return**.
13. Click the **Sales** tab.
14. Enter the Unit of Measure (**Each**), the Quantity Per Unit (**1.0**), and the Lead Time in days (**30**).
15. Enter an Image URL (**../images/desktop1.jpg**).

This URL points to the location of a file that displays an image of the product. The end-user can see this image when they browse the catalog.

The Datasheet URL field is optional, like the Image URL field. You can, however, enter a URL which points to a file that displays a data sheet. We will not enter Datasheet URLs for these products.

16. Click **Save Changes**.

When you have entered the information, the Product frame is displayed as follows.

The screenshot shows the 'Sales' tab of the Product Frame. The form contains the following fields and controls:

- General Tab:** Product ID: MXDS-7490, Product Name: Matrix 7490 Desktop
- Sales Tab:**
 - Unit of Measure: Each (dropdown)
 - Quantity Per Unit: 1.0
 - Minimum Order Quantity: 1
 - Lead Time in days: 30
 - ☐ Cannot be Sold Separately
 - ☐ Service Type
 - Supplier: Enterprise
 - Image URL: ../images/desktop1.jpg (with Upload and Browse Content Manager... buttons)
 - Datasheet URL: (with Upload and Browse Content Manager... buttons)

FIGURE 30. Product Frame: Sales Tab

Notice the lower-left Product frame in Figure 31 on page 31. There is a new product. In the Product Category frame, notice that the category Desktops is still selected, but notice also that, in the Product tab, the new product is displayed as a child of this category.

Click on MXDS-7490 in the lower-left Product frame. Notice that the tabs for the product appear in the content frame to the right.

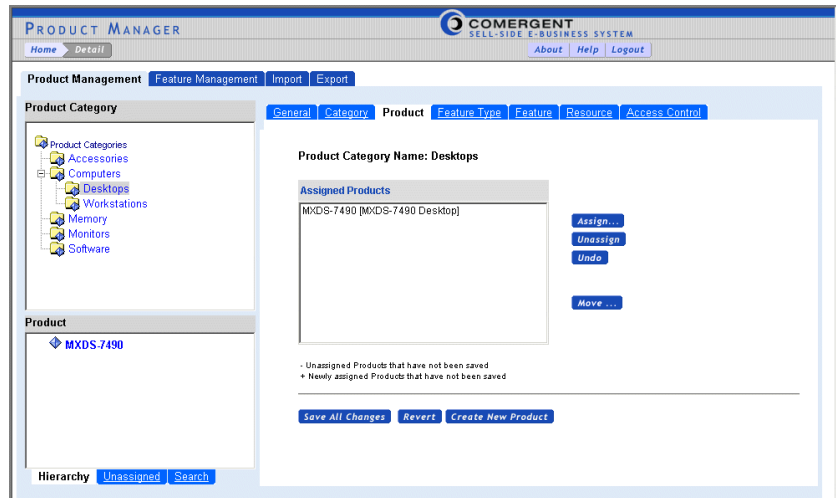


FIGURE 31. Product Frame with New Product

Exercises

- Create the remaining products in the Desktops category. Use the information as shown in Table 5 on page 32.

Select Normal for Component Type and select Release for the Status. Enter the current date for all Start Dates and a date five years from the current date for all End Dates. Enter a Unit of Measure (Each), Quantity Per Unit (1.0), and Lead Time in days (30). Enter the Image URL as shown in the table.

TABLE 5. Products to be Created

Product ID	Product Name	Description	Image URL
MXDS-7510	Matrix 7510 Desktop	The Matrix 7510 Desktop comes standard with an Intel Pentium III Processor 866MHz, 192MB RAM, 20GB hard drive, 16X CD-ROM drive, 32MB nVidia TNT2 M64 graphics card, and a 19" Monitor.	../images/desktop3.jpg
MXDS-7520	Matrix 7520 Desktop	The Matrix 7520 Desktop comes standard with an Intel Pentium III Processor 866MHz, 192MB RAM, 40GB hard drive, 40X CD-ROM drive, 32MB nVidia TNT2 M64 graphics card, and a 19" Monitor.	../images/desktop1.jpg
MXDS-7550	Matrix 7550 Desktop	The Matrix 7550 Desktop comes standard with an Intel Pentium III Processor 850MHz, 256MB RAM, 75GB hard drive, DVD/CD-ROM drive, 32MB nVidia TNT2 M64 graphics card, and a 17" Monitor.	../images/desktop3.jpg

TABLE 5. Products to be Created (Continued)

Product ID	Product Name	Description	Image URL
MXDS-7600	Matrix 7600 Desktop	The Matrix 7600 Desktop comes standard with an Intel Pentium III Processor 1.0GHz, 256MB RAM, 150GB hard drive, DVD/CD-ROM drive, 64MB nVidia TNT2 M64 graphics card, and a 18" Flat Panel Monitor.	../images/desktop3.jpg

When you complete this exercise, the Product frame for the Desktops category appears as in Figure 32 on page 33.

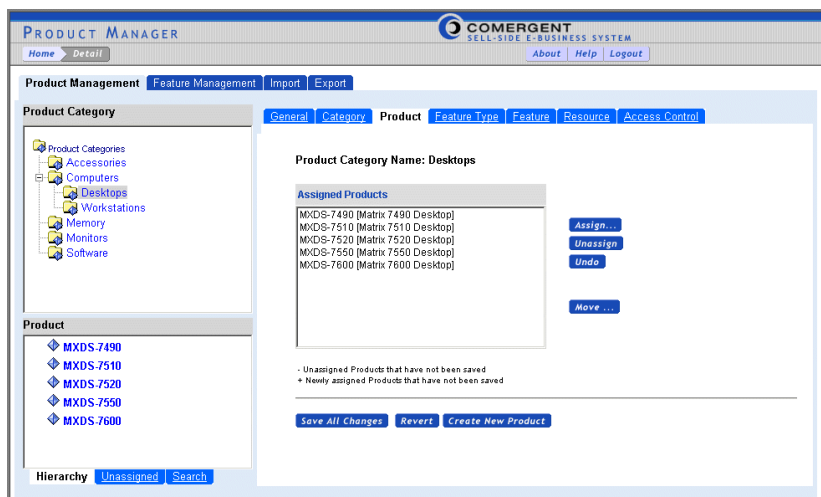


FIGURE 32. Desktops Category with Desktop Products

Creating the Workstation Products

In this section, you will create the products for the Workstations category:

- Matrix 7510 Workstation
 - Matrix 7530 Workstation
1. In the Product Category frame, click on Workstations.
The Product frame appears empty as before. The **Product Management** tab displays the tabs for the Workstations category.
 2. Click the **Product** tab.



FIGURE 33. Product Tab

3. Click **Create New Product**.

The **Product** tab is re-displayed with the fields for creating a new product.

The screenshot shows the 'PRODUCT MANAGER' web application interface. The top navigation bar includes 'Home', 'Detail', 'About', 'Help', and 'Logout'. Below this, there are tabs for 'Product Management', 'Feature Management', 'Import', and 'Export'. The 'Product Management' tab is active, and within it, the 'Product' sub-tab is selected. On the left, a 'Product Category' tree shows a hierarchy: Product Categories > Computers > Desktops > Workstations. The main form area contains the following fields and controls:

- Product ID:** A text input field.
- Product Name:** A text input field.
- Description:** A text area with a scroll bar.
- Component Type:** A dropdown menu set to 'Normal' and a checkbox labeled 'Cannot be Sold Separately'.
- Model:** A dropdown menu.
- Start Date (MM/DD/YYYY):** A date input field.
- End Date (MM/DD/YYYY):** A date input field.
- Unit of Measure:** A dropdown menu set to 'Each'.
- Quantity Per Unit:** A text input field with the value '1.0'.
- Lead Time in days:** A text input field with the value '0'.
- Image URL:** A text input field.
- Datasheet URL:** A text input field.

At the bottom of the form, there are two buttons: 'Save All and Return to List' and 'Cancel and Return to List'. At the bottom left of the application, there are links for 'Hierarchy', 'Unassigned', and 'Search'.

FIGURE 34. Product Tab with Fields for New Product

4. Enter a Product ID, Product Name, and Description for the new product, as shown in the following table.

TABLE 6. Matrix 7510 Workstation

Product ID	Product Name	Description
MXWS-7510	Matrix 7510 Workstation	The Matrix 7510 Workstation comes standard with an Intel Pentium III Processor 866MHz, 128MB RAM, 10GB hard drive, 16X CD-ROM drive, 16MB nVidia TNT2 M64 graphics card, and a 15" Monitor.

Again, the Description that you enter here is displayed to end-users when they browse your product catalog.

5. Select the Component Type as Normal.

6. Enter a Start Date (the current date) and an End Date (a date five years from the current date).
7. Select Released from the **Status** drop-down list.
8. Click **Save and Return**.
9. Click the Sales tab.
10. Enter the Unit of Measure (Each), the Quantity Per Unit (1.0), and the Lead Time in days (30).
11. Enter an Image URL (../images/workstation.jpg).
The end-user can see this image of the product when they browse the catalog.
12. Leave the Datasheet URL field blank.
13. Click **Save Changes**.

Notice the lower-left Product Frame in Figure 35 on page 36. There is a new product. Notice also that there is a new child product in the list for the category.

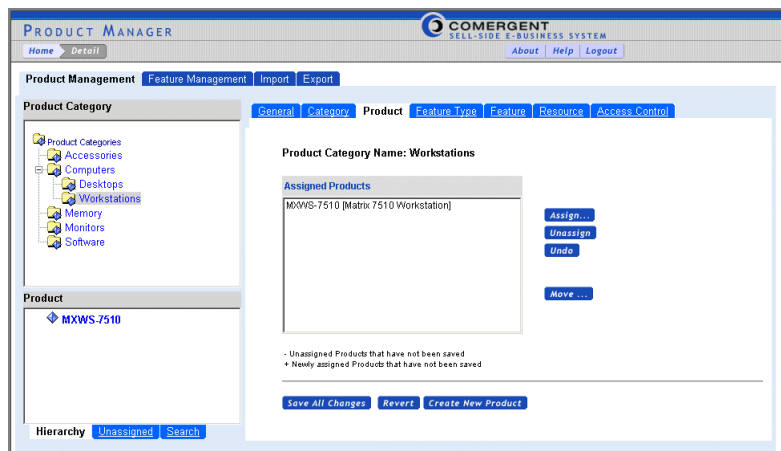


FIGURE 35. Product Frame with New Product

14. Create the remaining product in the Workstations category. Use the information in Table 7 on page 37.

Select Normal for the Component Type. Enter the current date for the Start Date and a date five years from the current date for the End Date. Enter a Unit of Measure (Each), Quantity Per Unit (1.0), and Lead Time in days (30). Enter the Image URL as shown in the table.

TABLE 7. Workstation Product to be Created

Product ID	Product Name	Description	Image URL
MXWS-7530	Matrix 7530 Workstation	The Matrix 7530 Workstation comes standard with an Intel Pentium III Processor 866MHz, 192MB RAM, 20GB hard drive, 16X CD-ROM drive, 16MB nVidia TNT2 M64 graphics card, and a 17" Monitor.	../images/workstation.jpg

Setting Prices for Products

Once you have added your products to the product catalog, you need to define prices for the products and make the products accessible to your customers. Of course, you need to add customers. We will do this, however, in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users". In this lesson, you will create the price lists which comprise the products. In LESSON 5, "Bringing Partners and Products Together", you will assign one or more of these price lists to the partners.

Creating a Price List for a Category of Products

In this part of the lesson, you will create a price list using all the products in a category.

1. Click **Administration** on the Matrix Home page.
2. Log in to the Comergent eBusiness System as the **bwillow** user (password: **bwillow**) you created in LESSON 1, "Enterprise Users and Their Functions".

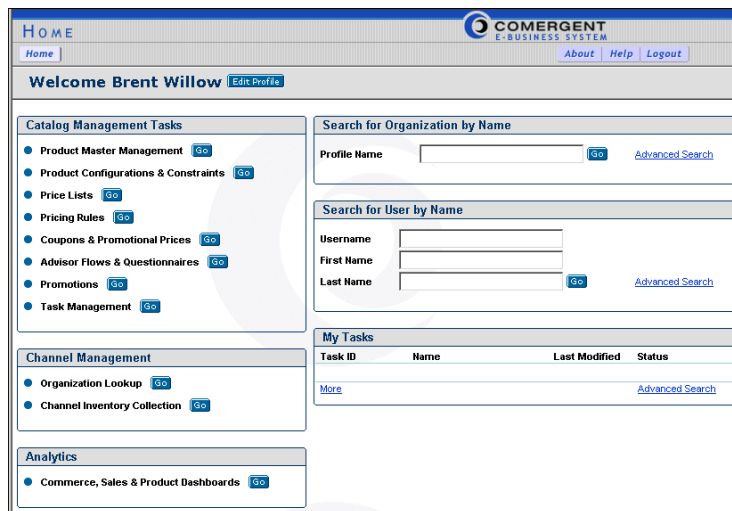


FIGURE 36. Enterprise Home Page

3. Click **Go** next to Price Lists.

The Price Lists page appears.

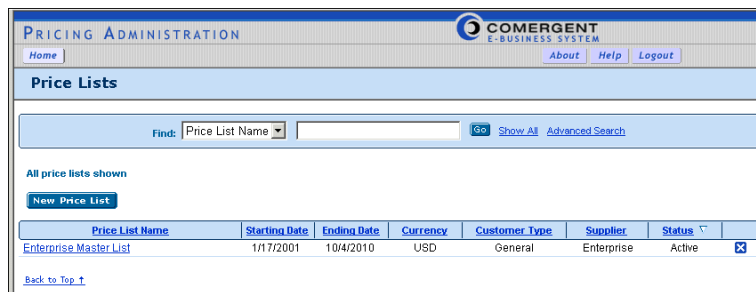


FIGURE 37. Price Lists Page

4. Click **New Price List**.

This displays the Price List Detail page (Figure 38 on page 41). Notice the product categories (created in the previous lesson) in the left-hand navigation frames.

The screenshot shows the 'New Price List' form in the Comergent E-Business System. The form is titled 'PRICING ADMINISTRATION' and 'COMERGENT E-BUSINESS SYSTEM'. It includes a 'New Price List' header and a 'Price List Header' section. The form contains fields for Name, Description, Currency, Customer Type, Supplier, Starting Date, and Ending Date. There are also 'Create' and 'Cancel' buttons.

FIGURE 38. Price List Detail Page

5. Enter the basic information about the price list.
Enter the information shown in Table 8 on page 41.

TABLE 8. Entries for General Information

Field	Information
Name	Commercial_One
Description	Commercial Price List
Currency	USD
Customer Type	General
Starting Date	<i>Enter the current date</i>
Ending Date	<i>Enter a date five years from the current date</i>

6. Click the **Active** check box.

At this point, the new price list should appear as in Figure 39 on page 42.

PRICING ADMINISTRATION **COMERGENT**
E-BUSINESS SYSTEM

Home > List > Detail About Help Logout

New Price List [Go to Price Lists](#)

Edit Header

Enter data and click on Create button to create price list

[Create](#) [Cancel](#)

Price List Header

* Name:

Description:

* Currency:

* Customer Type:

* Supplier: (Enterprise)

* Starting Date (M/D/YYYY):

* Ending Date (M/D/YYYY):

Active: ☒

FIGURE 39. Price List Detail Page

7. Click **Create**.
8. For this price list, we want to assign all the products we have created so far.
9. Click on **Assign Products**.

PRICING ADMINISTRATION **COMERGENT**
E-BUSINESS SYSTEM

Home > List > Detail About Help Logout

Commercial_One [Go to Price Lists](#)

Edit Header Edit Items Assign Products Mass Update View Organization Assignments

Find: ☒ View Unassigned Only

Select appropriate search criteria to find products you want to add to this price list. Partial entries for searches by Product ID are supported. Search by Product Category displays products belonging to specified product category. Use Assign button to add selected products with corresponding prices to the current price list.

[Assign](#)

Product ID	Product Name	Start Date	End Date	List Price	+/- in %	+/- in Abs.	Price
------------	--------------	------------	----------	------------	----------	-------------	-------

FIGURE 40. Price List Detail Page: Assign Products Tab

10. Select Product ID from the Find drop-down list and enter “*” in the Search field.
11. Click **Go**.

PRICING ADMINISTRATION **COMERGENT E-BUSINESS SYSTEM**

Home > List > Detail About Help Logout

Commercial_One Go to Price Lists

Edit Header Edit Items Assign Products Mass Update View Organization Assignments

Find: Product ID * View Unassigned Only Go

Select appropriate search criteria to find products you want to add to this price list. Partial entries for searches by Product ID are supported. Search by Product Category displays products belonging to specified product category. Use Assign button to add selected products with corresponding prices to the current price list.

Assign

Select All Deselect All

Product ID	Product Name	Start Date	End Date	List Price	+/- In %	+/- In Abs.	Price
<input type="checkbox"/> MXDS-7490	Matrix 7490 Desktop			1000.00			1000.00
<input type="checkbox"/> MXDS-7510	Matrix 7510 Desktop						
<input type="checkbox"/> MXDS-7520	Matrix 7520 Desktop						
<input type="checkbox"/> MXDS-7550	Matrix 7550 Desktop						
<input type="checkbox"/> MXDS-7600	Matrix 7600 Desktop						
<input type="checkbox"/> MXWS-7510	Matrix 7510 Workstation						
<input type="checkbox"/> MXWS-7530	Matrix 7530 Workstation						

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FIGURE 41. Price List Detail Page: Assign Products Tab

12. On each line, enter 1999.00 in the List Price field.
13. Click **Select All**.
14. Click **Assign**.

PRICING ADMINISTRATION **COMERGENT E-BUSINESS SYSTEM**

Home > List > Detail About Help Logout

Commercial_One Go to Price Lists

Edit Header Edit Items Assign Products Mass Update View Organization Assignments

Find: Product ID * View Unassigned Only Go

Select appropriate search criteria to find products you want to add to this price list. Partial entries for searches by Product ID are supported. Search by Product Category displays products belonging to specified product category. Use Assign button to add selected products with corresponding prices to the current price list.

Assign

Select All Deselect All

Product ID	Product Name	Start Date	End Date	List Price	+/- In %	+/- In Abs.	Price
<input type="checkbox"/> MXDS-7490	Matrix 7490 Desktop			1999.00			1,999.00
<input type="checkbox"/> MXDS-7510	Matrix 7510 Desktop			1999.00			1,999.00
<input type="checkbox"/> MXDS-7520	Matrix 7520 Desktop			1999.00			1,999.00
<input type="checkbox"/> MXDS-7550	Matrix 7550 Desktop			1999.00			1,999.00
<input type="checkbox"/> MXDS-7600	Matrix 7600 Desktop			1999.00			1,999.00
<input type="checkbox"/> MXWS-7510	Matrix 7510 Workstation			1999.00			1,999.00
<input type="checkbox"/> MXWS-7530	Matrix 7530 Workstation			1999.00			1,999.00

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FIGURE 42. Price List Detail Page: Prices Added

Provided that this price list is assigned to their partner, the end-user sees these prices as they browse the product catalog.

You can change prices for one or more of the products as follow:

15. Click **Edit Items**.

PRICING ADMINISTRATION **COMERGENT E-BUSINESS SYSTEM**

Home > List > Detail About Help Logout

Commercial_One Go to Price Lists

Edit Header Edit Items Assign Products Mass Update View Organization Assignments

Find: Category [] [Go]

Select appropriate search criteria to find price list items. Partial entries for searches by Product ID are supported. Search by Product Category displays all price list items belonging to specified product category. Use Delete button to delete selected products from the price list. After changing prices save changes using the Save button

Delete Save

Select All Deselect All

<input type="checkbox"/>	Product ID	Product Name	Start Date	End Date	List Price	+/- in %	+/- in Abs.	Price	
<input type="checkbox"/>	MXDS-7490	Matrix 7490 Desktop			1999.0000			1,999.00	
<input type="checkbox"/>	MXDS-7510	Matrix 7510 Desktop			1999.0000			1,999.00	
<input type="checkbox"/>	MXDS-7520	Matrix 7520 Desktop			1999.0000			1,999.00	
<input type="checkbox"/>	MXDS-7550	Matrix 7550 Desktop			1999.0000			1,999.00	
<input type="checkbox"/>	MXDS-7600	Matrix 7600 Desktop			1999.0000			1,999.00	
<input type="checkbox"/>	MXWS-7510	Matrix 7510 Workstation			1999.0000			1,999.00	
<input type="checkbox"/>	MXWS-7530	Matrix 7530 Workstation			1999.0000			1,999.00	

Back to Top ↑ Save

FIGURE 43. Price List Detail Page: Edit Items Tab

16. Modify the prices of the following products.

TABLE 9. Entries for Prices

Product	List Price	+/- in %	+/- in Abs.
MXDS-7490	1999	-5	
MXDS-7510	1999	-10	
MXWS-7510	2999		-10

+/- in % defines a percentage of the amount in the List Price column that is either discounted from (-) or added to (+) the amount. In the example above, in the first line you entered **-5**, thus discounting the price by 5%. If you had entered **+5**, then you would have *added* 5% to the list price amount.

+/- in Abs. defines an absolute amount that is to be subtracted from or added to the amount in the List Price column. If you enter 5, for example, then you are adding that amount in the selected currency. If you enter -5, then you are subtracting that amount.

As you make each change and click in the next row, notice that the price in the right-hand Price column changes.

17. Click **Save**.
18. Click **List** to return to the Price Lists page.

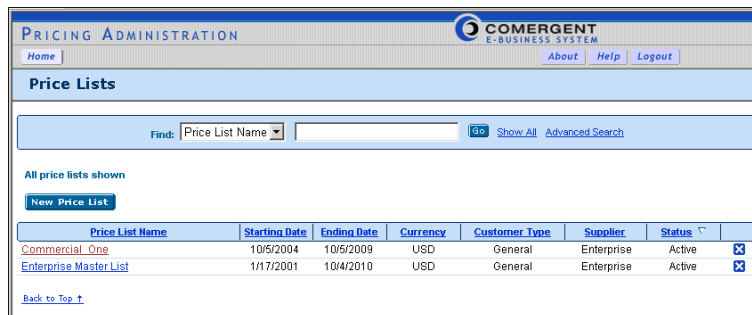


FIGURE 44. Price Lists Page Showing New List

Notice that there is another list there, the Enterprise Master List. This list comes installed with the Comergent eBusiness System. You will modify this list later in the lesson.

Creating a Price List for Selected Products

In this part of the lesson, you create another price list that will contain a subset of the products in the price list you just created.

At the end of the last part of the lesson, the Price Lists page appears as in Figure 44 on page 45.

1. Click **New Price List**.

This displays the Price List Detail page (Figure 45 on page 46).

PRICING ADMINISTRATION **COMERGENT**
E-BUSINESS SYSTEM

Home > List > Detail About Help Logout

New Price List [Go to Price Lists](#)

Edit Header

Enter data and click on Create button to create price list

[Create](#) [Cancel](#)

* Required Fields

Price List Header

* Name:

Description:

* Currency:

* Customer Type:

* Supplier: (Enterprise)

* Starting Date (M/D/YYYY):

* Ending Date (M/D/YYYY):

Active: ☐

FIGURE 45. Price List Detail Page

2. Enter the basic information about the list.

Enter the information shown in Table 8 on page 41.

TABLE 10. Entries for General Information

Field	Information
Name	7510 Computers in US Dollars
Description	Desktops and/or Workstations with Special Prices
Currency	USD
Customer Type	Commercial
Starting Date	(Enter the current date, including hour/minute.)
Ending Date	(Enter a date three months from the current date, including hour/minute.)

3. Click the **Active** check box.
4. Click **Create**.

At this point, the new price list should appear as in Figure 39 on page 42.

The screenshot displays the 'PRICING ADMINISTRATION' interface for the 'COMERGENT E-BUSINESS SYSTEM'. The main title is '7510 Computers in US Dollars'. Below the title, there are tabs for 'Edit Header', 'Edit Items', 'Assign Products', 'Mass Update', and 'View Organization Assignments'. A 'Go to Price List' link is also present. A paragraph of instructions explains the functionality of the 'Copy', 'Download', 'Assign All', 'Unassign All', and 'Save' buttons. The 'Price List Header' section contains the following fields: 'Name' (7510 Computers in US Dollars), 'Description' (Desktops and/or Workstations with Special Prices), 'Currency' (USD), 'Customer Type' (Commercial), 'Supplier' (1), 'Starting Date' (10/5/2004), 'Ending Date' (1/5/2005), and time selectors for both dates. A '*Required Fields' note is located at the top right of the form area.

FIGURE 46. Price List Detail Page

For this price list, we want to assign only the Matrix 7510 Desktop and the Matrix 7510 Workstation.

5. Click the Assign Products tab.
6. Select Product ID from the Find drop-down list and enter “*7510*” in the Search field.
7. Click **Go**.

PRICING ADMINISTRATION **COMERGENT**
E-BUSINESS SYSTEM

Home > List > Detail About Help Logout

7510 Computers in US Dollars [Go to Price List](#)

Edit Header Edit Items Assign Products Mass Update View Organization Assignments

Find: Product ID 7510* ☒ View Unassigned Only

Select appropriate search criteria to find products you want to add to this price list. Partial entries for searches by Product ID are supported. Search by Product Category displays products belonging to specified product category. Use Assign button to add selected products with corresponding prices to the current price list.

[Select All](#) [Deselect All](#)

Product ID	Product Name	Start Date	End Date	List Price	+/- in %	+/- in Abs.	Price
<input type="checkbox"/> MXDS-7510	Matrix 7510 Desktop						
<input type="checkbox"/> MXWS-7510	Matrix 7510 Workstation						

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FIGURE 47. Price List Detail Page

You can now see both products that you added to the price list (Figure 47 on page 48).

8. On each line, enter 1999.00 in the List Price field.
9. Click **Select All**.
10. Click **Assign**.

The price is propagated through the two products on the list.

11. Click **Edit Items**.
12. Modify the Prices as shown in the following table.

TABLE 11. Entries for Prices

Product	List Price	+/- in %	+/- in Abs.
MXDS-7510	1299		-10
MXWS-7510	1999	-10	

As you make each change and click in the next row, notice that the price in the right-hand Price column changes.

13. Click **Save**.
14. Click **List** to return to the Price Lists page.

Modifying the Enterprise Master List

The Enterprise Master List is a price list that is installed with the Comergent eBusiness System. See the *Comergent eBusiness System Administration Guide* for an explanation of the Enterprise Master List.

For the second half of this lesson, we will modify this list so as to add all the products to this list. This will be the master list, in US dollars, that you will assign to customers so they have access to all the products.

1. In the Search Results page, click on **Enterprise Master List**.

This displays the Price List Detail page for this list. In Figure 48 on page 49, examine the Assign Products tab. Notice that there are no products on this “master list” as yet.

FIGURE 48. Enterprise Master List: Assign Products Tab

2. Select Product ID from the Find drop-down list and enter “*7510*” in the Search field.
3. Click **Go**.
4. Enter the prices for the products as shown in the following table.

TABLE 12. Entries for Prices

Product	List Price	+/- in %	+/- in Abs.
MXDS-7490	1299.00	-5	
MXDS-7510	1299.00	-10	
MXDS-7520	1299.00		-10
MXDS-7550	1299.00		-10

TABLE 12. Entries for Prices (Continued)

Product	List Price	+/- in %	+/- in Abs.
MXDS-7600	1299.00	-10	
MXWS-7510	1299.00	-10	
MXWS-7530	1299.00	-5	

5. For MXWS-7510, click **Edit**.

This displays the Conditional List page. Here you can set prices for particular conditions.

6. Click **Edit Conditional Rules**.
7. Select Profile Type from the First Option column, and select Profile Membership Level from the Second Option column.
8. Find the line with **Retailer** in the first column, and **Platinum** in the second column.

PRICING ADMINISTRATION **COMERGENT**
E-BUSINESS SYSTEM

Home > List > Detail About Help Logout

Enterprise Master List: MXWS-7510 Return

Edit Quantity Tiers Edit Conditional Rules

Make changes to quantity tiers and/or conditional rules and save changes by clicking on 'Save' or return back to price list lines by clicking on 'Return'

Save

Profile Type	Profile Membership Level	+/- in %	+/- in Abs.
Distributor	Platinum		
Distributor	Gold		
Distributor	Silver		
Distributor	Tin		
Distributor	Not Applicable		
OEM	Platinum		
OEM	Gold		
OEM	Silver		
OEM	Tin		
OEM	Not Applicable		
Reseller	Platinum		
Reseller	Gold		
Reseller	Silver		
Reseller	Tin		
Reseller	Not Applicable		
Retailer	Platinum		

FIGURE 49. Conditional Price List Page

9. Enter **-10** for +/- in %.
10. Click **Save**.
11. Click **Return**.

12. Observe that on the list of products, the Conditional Rules button now indicates that there is a conditional rule for the MXWS-7510 product.

Exercises

- Create some more price lists, experimenting with various ways of adding products.
- Display the Price List detail page for one of the lists. Click the icon in the Edit column for one of the products and examine the Conditional Price List page. This page enables you to set prices for particular conditions. For example, you can set a price based on a customer who is a distributor and who has a platinum membership level. Examine the various options you can select from the drop down lists. Select some and see what happens.

Creating a Storefront Price List

Later on this *Comergent eBusiness System Tutorial Guide* we show how a partner user can obtain price and availability information from a storefront partner. To do this, we need to:

- Create a storefront price list
- Assign the storefront price list to the partner

Creating a Storefront Price List

1. Point your browser to the enterprise login page, and log in as pkelley (the profile administrator for Anderel).
2. The enterprise home page for storefront partners is displayed. This gives storefront administrators access to the program management functions they need.



FIGURE 50. Enterprise Home Page for Storefront Administrators

3. Click **Go** next to Price Lists.
4. Click **New Price List**.
5. Call the price list: Anderel Price List and repeat the steps to assign products to the price list that you did in "Creating a Price List for a Category of Products" on page 39, and assign the price of \$899.00 to each product.
6. Log out when you have finished creating the price list.

Assigning the Storefront Price List to the Partner

1. Point your browser to the enterprise login page, and log in as bwillow (an enterprise administrator).
2. Enter "Aff*" into the Profile Name field in Search for Organization by Name panel and click **Go**.
3. On the Profile List page, click the link to AffinityNet.
4. On the Organization Profile page, click the Pricelists tab.
5. Check the Anderel Price List check box and click **Save**.
6. Log out.

The storefront price list is now assigned to the AffinityNet partner. This means that when AffinityNet users request prices from the Anderel distributor, then the prices they see are taken from this price list, and not from enterprise price lists assigned to their partner.

Creating Partners, Partner Administrators, and Partner Users

You have created enterprise users and, by assigning them particular functions, you have given them the appropriate permissions for accessing the Comergent eBusiness System. You have created products for the product catalog and you have set prices for those products.

Now is the time to create your channel partners and, for each partner, a partner administrator. Each partner administrator will create the partner users for their company. These partner users are the end-users who will buy the products you created in LESSON 2, "Creating Simple Products".

Matrix Products has five partners through which it sells its products:

TABLE 13. Matrix Products Partners

Partner Name	Partner Type	Description
Anderel	Distributor	Buys Matrix products directly from Matrix.
AffinityNet	Reseller	Buys Matrix products directly from Matrix.
DataMatrix	Reseller	Buys Matrix products directly from Matrix.
FirstCommerce	Retailer	Buys Matrix products directly from Matrix.
CompCom	OEM	Buys Matrix products directly from Matrix.

In this lesson, we will create the partner profiles for these partners. Then we will create a partner administrator for each partner. Finally, we will log in as each partner administrator and create the partner users who can log in for each partner.

Creating a Partner

For the purposes of this tutorial, we will set up Anderel as a *storefront*: that is, a partner whose storefront is hosted as part of the enterprise Comergent eBusiness System.

1. Login to the Comergent eBusiness System Administration page as the bwillow user (password: bwillow) you created in LESSON 1, "Enterprise Users and Their Functions".

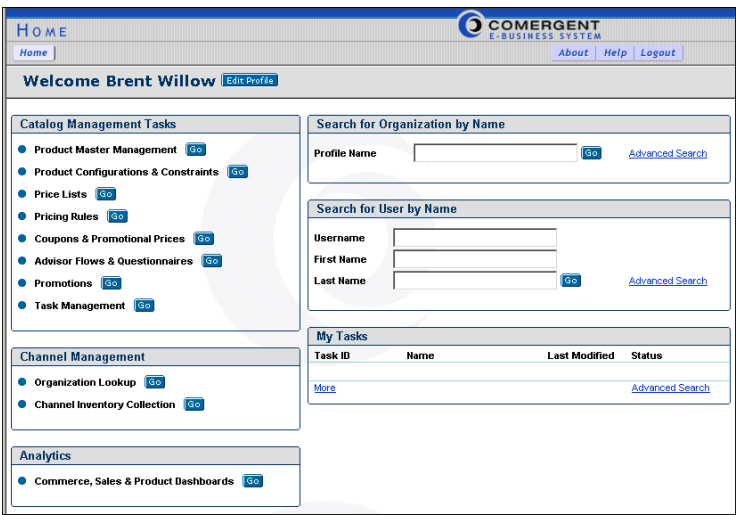


FIGURE 51. Enterprise Home Page

2. Click **Go** in the Search for Organization by Name panel.
The Profile List page appears.

The screenshot shows the 'ORGANIZATION PROFILE' page with the 'COMERGENT E-BUSINESS SYSTEM' logo. The 'Profile List' section includes a search bar with 'Find records that contain:' and a dropdown for 'Profile Name'. Below the search bar are buttons for 'Export List', 'Create Indirect Profile', and 'Create Direct Profile'. A table below these buttons has columns for 'Name', 'Root Profile Name', 'Type', 'Level', and 'Commerce Category'. The table contains one row with 'Enterprise' in the 'Name' column, 'Enterprise' in the 'Type' column, 'Enterprise' in the 'Level' column, and 'Indirect' in the 'Commerce Category' column.

FIGURE 52. Profile List Page

3. Click **Create Direct Profile**.

This displays the Organization Profile page.

The screenshot shows the 'Organization Profile: New Profile' page. The 'Create' section has a 'Save' button and a 'Cancel' button. Below the buttons is a note: 'Please enter Mandatory Profile Information. Once this profile has been saved, you will be allowed to enter more information. NOTE: (*) items are required.' The form is divided into two main sections: 'Enter Organization ID' and 'Enter Organization ID'. The 'Enter Organization ID' section has fields for 'Profile name' (with a dropdown), 'Organization website address', 'Main telephone', 'Main facsimile', 'Distributors' (with a dropdown), and 'Custom Field #1', 'Custom Field #2', and 'Custom Field #3'. The 'Enter Organization ID' section has fields for 'Organization ID', 'Address line 1', 'Address line 2', 'City', 'State/Province and Postal code', and 'Country' (with a dropdown). There is also a 'Remove' button in the 'Distributors' section.

FIGURE 53. Organization Profile Page

4. Enter the following partner information:

- Profile name: Anderel
- Profile type: Distributor
- Profile level: Silver

-
- Organization ID: ANDRL-1000

In addition to these fields, since Anderel is a distributor, you must enter:

- an XML Message Version: dXML 4.0
- Message URL: <http://commerce.company.com/Comergent/msg/anderel>

When partner users want to place orders to the Anderel storefront, then the communication between Matrix and Anderel will use this message format and make use of this URL.

The remaining fields are optional. For this lesson, we will leave those fields blank.

5. Enter the following address information:

- Address line 1: 601 Emerald Bay Lane
- Address line 2: First Floor
- City: Springfield
- State/Province and Postal Code: CT 26595
- Country: USA

6. Click **Use as Sold To Address**.

A new check box appears: Set As Default Sold To Address. Check this box.

Notice the fields marked with an asterisk (*). These indicate required fields, so that only Address line 1 and Country are required for this tab.

7. Click **Save**.

The basic profile information is now saved. Now you can add profile administration using the profile administration tabs.

8. Click **Addresses**.

COMERGENT
E-BUSINESS SYSTEM

Home About Logout Help

Organization Profile: Anderel

Info Addresses Detail Business Hierarchy Logo Commerce Assigned To Pricelists Notes

View Users Save

Addresses

NOTE: (*) items are required.
[New](#) [Delete](#) [Duplicate](#) [Previous](#) 1 out of 1 [Next](#)

***Address line 1**
 601 Emerald Bay Lane

***Address line 2**
 First Floor

***City**
 Springfield

***State/Province and Postal code**
 CT 26595

***Country**
 USA

☒ Use as Sold To Address
☒ Set As Default Sold To Address

☒ Use as Ship To Address
☐ Set As Default Ship To Address

☒ Use as Bill To Address
☒ Set As Default Bill To Address

FIGURE 54. Addresses Tab With Entries

9. Click **New** at the top of the tab.
10. Enter the following information:
 - Address line 1: 603 Emerald Bay Lane
 - City: Springfield
 - State/Province and Postal Code: CT 26595
 - Country: USA
11. Click **Use as Ship To Address**.

A new check box appears: Set As Default Ship To Address. Do not click this box. Leave the box unchecked.

12. Click **Save**.

When you have completed the information, the Organization Profile Addresses tab should appear as in Figure 54 on page 57. Notice that the tab shows "2 of 2". Click the **Previous** link and notice that the first address reappears.

Home About Logout Help

Organization Profile: Anderel

Info Addresses Detail Business Hierarchy Logo Commerce Assigned To Pricelists Notes

View Users Save

Addresses

NOTE: (*) items are required.
[New](#) [Delete](#) [Duplicate](#) [Previous](#) 2 out of 2 [Next](#)

*Address line 1 803 Emerald Bay Lane	Address line 2
*City Springfield	State/Province and Postal code CT 06595
*Country USA	

☐ Use as Sold To Address ☒ Use as Ship To Address ☐ Use as Bill To Address
☐ Set As Default Ship To Address

FIGURE 55. Addresses Tab With Second Address

13. Click the **Detail** tab.

Home About Logout Help

Organization Profile: Anderel

Info Addresses Detail Business Hierarchy Logo Commerce Assigned To Pricelists Notes

View Users Save

Detail

NOTE: (*) items are required.

*Organization ID Anderel	Founded 	Current FY revenue 0.0
Dun & Bradstreet ID 	Total # of employees 0	Next FY revenue 0.0
Fiscal year end month January		

Services Skills

[Delete](#) [Duplicate](#) [Previous](#) 1 out of 1 [Next](#)

Service name Asset Mgmt	Service level
Service description Asset Management	

FIGURE 56. Detail Tab

14. Enter the Company ID: M00212G.

15. Click **Save**.

Notice the two tabs at the bottom of the **Detail** tab. The **Services** tab provides information about the services offered by the partner; the **Skills** tab provides information about the skills and skill levels assessed for this partner. These are optional. You can leave the current selections.

16. Click the **Business** tab.

The **Business** tab provides information about the business relationship between Matrix Products and the partner.

The screenshot shows the 'Business' tab of the 'Organization Profile: Anderel' page. The page has a blue header with the 'COMERGENT E-BUSINESS SYSTEM' logo and navigation links like 'Home', 'About', 'Logout', and 'Help'. Below the header is a tabbed interface with 'Info', 'Addresses', 'Detail', 'Business' (selected), 'Hierarchy', 'Logo', 'Commerce', 'Assigned To', 'Pricelists', and 'Notes'. The 'Business' tab contains three sections: 'Product Categories', 'Territories', and 'Customer types', each with a 'Select to add' dropdown and a 'Delete' button. Below these is a 'Commerce Category' section showing 'Direct'. At the bottom is a 'Contracts' section with 'Delete' and 'Duplicate' links, a pagination indicator 'Previous 1 out of 1 Next', a note '(*) Items are required when creating a contract.', and a table with columns 'Name', 'Active date (MM/YYYY)', and 'Volume commitment (YR)'. The table has one empty row.

FIGURE 57. **Business Tab**

17. In the upper part of the tab, select **North America** from the Territories drop-down list.

18. Select the following types from the **Customer types** drop-down list:

- General
- Government
- Commercial
- Pharmaceutical

- Telecommunications
- High Technology
- Education

Notice the **Contracts** sub-tab. In this tab, you will enter information about business agreements between Matrix Products and this partner.

19. In the Contracts sub-tab, enter the Name (PRS-RG03013) and Type code (MS-PN002871).

The remaining fields are optional.

20. Click **Duplicate** to create a second contract.
21. Modify the Name (PRS2-RG03013) and Type code (MS2-PN002871).

When you have entered this information, the Business tab should appear as in Figure 58 on page 60.

The screenshot displays the 'Business' tab interface for the organization 'Anderel'. At the top, there's a navigation bar with links like Home, About, Logout, and Help. Below this is a sub-tab bar with options: Info, Addresses, Detail, Business (selected), Hierarchy, Logo, Commerce, Assigned To, Pricelists, and Notes. The main content area is divided into several sections: 'Product Categories' with a 'Select to add' dropdown and a 'Delete' button; 'Territories' with a 'Select to add' dropdown showing 'North America' and a 'Delete' button; 'Customer types' with a 'Select to add' dropdown showing 'General', 'Government', 'Commercial', and 'Pharmaceutical', and a 'Delete' button; and 'Commerce Category' set to 'Direct'. Below these is the 'Contracts' sub-tab, which contains a table with one entry. The table has columns for 'Name', 'Active date (M/D/YYYY)', and 'Volume commitment (YR)'. The entry has the name 'PRS2-RG03013', an empty active date field, and a volume commitment of '0'. There are 'Delete' and 'Duplicate' links for the contract entry, and a 'Previous 2 out of 2 text' link. A note at the bottom states: 'NOTE: (*) Items are required when creating a contract.'

FIGURE 58. Business Tab with Entries

22. Click **Save**.
23. Click the **Commerce** tab. This is the page on which we set up the storefront characteristics for the storefront. Enter the following values:
 - Check the following check boxes:

- Account
 - Credit Card
 - Visa
 - MasterCard
 - UPS
 - Enable for Partner.com
 - Enable as Storefront
 - Enter the following for the Profile name: anderel
24. Click **Save**.

The Organization Profile page reappears and the information is saved.

Creating a Partner Administrator for a Direct Commerce Partner

Once you have created a partner, you will need to create a partner administrator. The partner administrator is, typically, an employee of the partner with the authority to create partner users who will be able to log into the enterprise site and buy products from the product catalog.

In the first part of this lesson, we created a direct commerce partner named Anderel. By the end of the last section, the Organization Profile page should appear as in Figure 58 on page 60.

1. Click **View Users**.

This displays the User List page.

USER ADMINISTRATION HOME

Home About Help Logout

User List: Anderel

Find records that contain: Username [Show All](#) [Advanced Search](#)

Anderel: All users shown

Username	Full Name	Functions	Manager	Profile	Business Phone	Email Address
No Records						

[Back to Top](#)

FIGURE 59. User List Page

- Click **Create User** to display the User Detail page.

COMERGENT E-BUSINESS SYSTEM

Home About Logout

Create New User

Info

Belongs to: [Anderel](#)

NOTE: (*) Items are required.

User Information

Username*

Password*

Confirm Password*

Title

First name*

Last name*

Job Title

User Locale

Preferred Locale

Note: changes to Preferred Locale will take effect on the next login.

☐ Away

User Functions

☐ Manager

User Type

Functions

☐ Commerce

☐ Commerce Executive

☐ Sales

☐ Sales Executive

☐ Financials

☐ Program Management

☐ Basic Profile Maintenance

☐ Profile Administration

User Spending Limits & Approver Info

Feature requires both Spending Limit and Approver.

Spending Limit

Approver

Proxy for Approvers

FIGURE 60. User Detail Page

- Enter the following information about the user:
 - Username: pkelley
 - Password: pkelley
 - Confirm Password: pkelley

- Title: Mr
- First name: Pat
- Last name: Kelley
- Email: pkelley@anderel.com

The remaining fields are optional.

4. Among the Functions, click the **Profile Administration** and **Program Management** check boxes.
5. Click **Save**.

This displays the User Detail page, showing the new user details (Figure 61 on page 63).

The screenshot shows the 'User Detail for Pat Kelley' page in the Comergent eBusiness System. The page has a navigation bar with 'Home', 'About', and 'Logout' links. Below the navigation bar, there are tabs for 'Info', 'Addresses', and 'Notes'. The 'Info' tab is selected. The page displays the following information:

- Belongs to:** Anderel
- NOTE:** (*) Items are required.
- User Information:**
 - Username*: pkelley
 - Password*: [masked]
 - Confirm Password*: [masked]
 - Title: Mr.
 - First name*: Pat
 - Last name*: Kelley
 - Job Title: [empty]
- User Locale:**
 - Preferred Locale: United States
 - Note: changes to Preferred Locale will take effect on the next login.
 - ☐ Away
- User Functions:**
 - ☐ Manager
 - ☐ User Type
 - ☐ User
 - ☐ Functions
 - ☐ Commerce
 - ☐ Commerce Executive
 - ☐ Sales
 - ☐ Sales Executive
 - ☐ Financials
 - ☐ Program Management
 - ☐ Basic Profile
 - ☐ Maintenance
 - ☒ Profile Administration
- Status:**
 - Please enter a reason when changing the status.
 - Parent Status: Open
 - Status: Open
 - Comment: [empty]
- User Spending Limits & Approver Info:**
 - Feature requires both Spending Limit and Approver.

FIGURE 61. User Detail Page

6. Click **View Users**.



FIGURE 62. User List Page

7. Click **Logout**.

Creating the Partner Users for the Direct Commerce Partner

So far, you have created a direct commerce partner who is a distributor, and you have created a partner administrator for this distributor. In this section, as the partner administrator, you will create two partner users for the **Anderel** distributor.

1. Point your browser to the URL for end-users to log in to the Comergent eBusiness System. This will look something like this:

```
http://commerce.company.com/Comergent/Comergent/en/US/adirect/matrix?cmd=OnlineOrderingPageDisplay
```

As discussed in LESSON 1, "Enterprise Users and Their Functions", the out-of-the-box installation contains a link, called **Products**, for end-users to log in. However, your installation might have customized links.

This displays the Partner Users Home page.

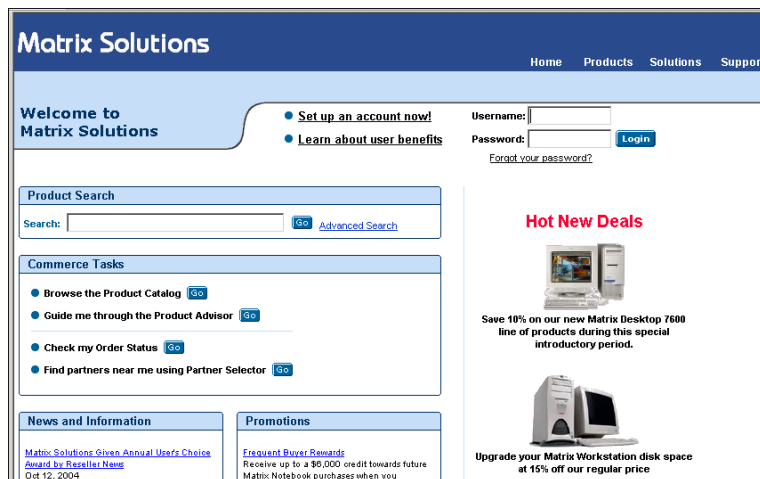


FIGURE 63. Partner User Home Page

2. Log in as the pkelley user (password: pkelley) that you have just created.
3. Click **Go** next to Update User Accounts.

This displays the Partner User List page.

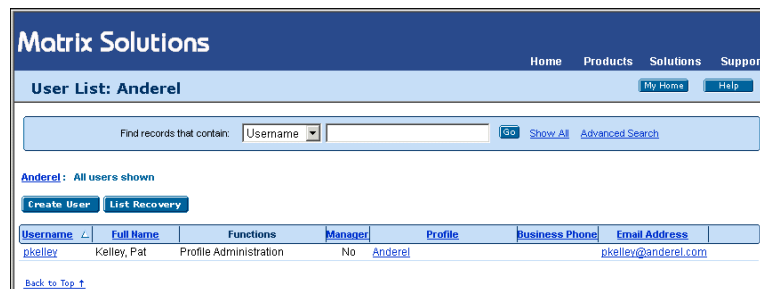


FIGURE 64. Partner User List Page

4. Click **Create User**.

This displays the Partner User Detail page.

Matrix Solutions

Home Products Solutions Support

Create New User [My Home](#) [Help](#)

Info

Belongs to: [Anderel](#) [Cancel](#) [Save](#)

NOTE: (*) Items are required.

User Information

Username*

Password*

Confirm Password*

Title

First name*

Last name*

Job Title

User Locale

Preferred Locale

Note: changes to Preferred Locale will take effect on the next login.

☐ Away

User Functions

☐ Manager

User Type

Functions

☐ Commerce

☐ Commerce Executive

☐ Sales

☐ Sales Executive

☐ Financials

☐ Program Management

☐ Basic Profile Maintenance

☐ Profile Administration

Payment Options

Please enter the default payment information

Payment Type

Credit Card Type

Payment Expiration Date

Payment Number/Account Number

Credit Card Holder

User Spending Limits & Approver Info

FIGURE 65. Partner User Detail Page

5. Enter the following information:

- Username: cjones
- Password: cjones
- Confirm Password: cjones
- Title: Mr
- First Name: Chuck
- Last Name: Jones
- Email: cjones@anderel.com

Notice also the field called **Preferred Locale**. Do not change this field for this tutorial. This enables you to change the language in which the screens appear. The change will take place when the partner user logs in.

6. Check the **Commerce** function check box.
7. Click **Save**.
8. Click **View Users**.

Notice that there is a new user on the Partner User List page.

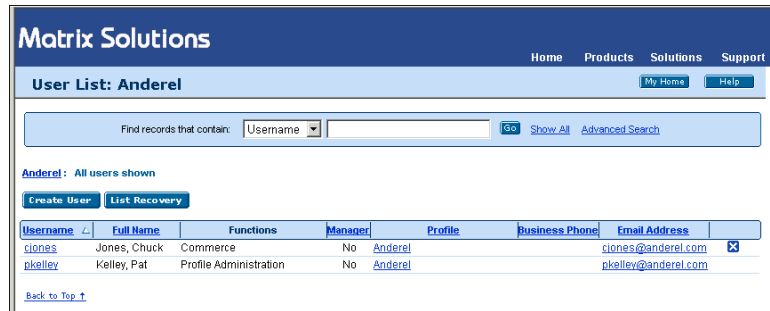


FIGURE 66. Partner User List Page

Exercises

- Create another partner user for Anderel using the steps in "Creating the Partner Users for the Direct Commerce Partner" on page 64. Use the following information.
 - Username: fbencroft
 - Password: fbencroft
 - Confirm Password: fbencroft
 - Title: Mr
 - First Name: Frank
 - Last Name: Bencroft
 - Email: fbencroft@anderel.com
- Create another direct commerce partner using the steps in "Creating a Partner" on page 54. Use the following information:
 - Partner Information:

TABLE 14. Partner Information

Partner Name	Partner Type	Partner Level
FirstCommerce	Retailer	Platinum

Since this partner is NOT a distributor, you do not have to enter a Message URL or specify an XML Message Version.

- Partner Addresses:

TABLE 15. Partner Addresses

Address Line 1	Address Line 2	City	State/Province and Postal Code	Country
234 Advent Drive	Suite 405	Palo Alto	CA 94304	USA

After you enter this information, click **Use as Sold-to Address**. A new box is displayed: Set as Default Sold To Address. Do not click this box.

- Partner Detail:
 - Company ID (M00515V)
- Business

TABLE 16. Partner Detail

Territories	Customer types	Contracts	
		Name	Type Code
North America	General Government Commercial Pharmaceutical Telecommunications High Technology Education	PRS-TG02111	MS-PN003981

- Create a partner administrator for the FirstCommerce partner, using the steps in "Creating a Partner Administrator for a Direct Commerce Partner" on page 61. Use the following information:
 - Username: mpoyser
 - Password: mpoyser
 - Confirm Password: mpoyser
 - Title: Mr
 - First name: Martin
 - Last name: Poyser
 - Email: mpoyser@firstcommerce.com
 - Functions: Profile Administration

- Create a partner user for the FirstCommerce partner, using the steps in "Creating the Partner Users for the Direct Commerce Partner" on page 64. Use the following information:
 - Username: jspencer
 - Password: jspencer
 - Confirm Password: jspencer
 - Title: Ms
 - First Name: Jane
 - Last Name: Spencer
 - Email: jspencer@firstcommerce.com
 - Functions: Commerce
- Create another direct commerce partner using the steps in "Creating a Partner" on page 54. Use the following information:
 - Partner Information:

TABLE 17. Partner Information

Partner Name	Partner Type	Partner Level
CompCom	OEM	Platinum

Since this partner is NOT a distributor, you do not have to enter a Message URL or specify an XML Message Version.

- Partner Addresses:

TABLE 18. Partner Addresses

Address Line 1	Address Line 2	City	State/Province and Postal Code	Country
25 Flashman Road	Suite 304	Palo Alto	CA 94304	USA

After you enter this information, click **Use as Sold-to Address**. A new box is displayed: Set as Default Sold To Address. Do not click this box.

- Partner Detail:
 - Company ID (M14512V)

- Business

TABLE 19. Partner Detail

Territories	Customer types	Contracts	
		Name	Type Code
North America	General Government Commercial Pharmaceutical Telecommunications High Technology Education	PRS-SS05444	MS-PN138551

- Create a partner administrator for the CompCom partner, using the steps in "Creating a Partner Administrator for a Direct Commerce Partner" on page 61. Use the following information:
 - Username: dirwine
 - Password: dirwine
 - Confirm Password: dirwine
 - Title: Mr
 - First name: David
 - Last name: Irwine
 - Email: dirwine@compcom.com
 - Functions: Profile Administration
- Create a partner user for the CompCom partner, using the steps in "Creating the Partner Users for the Direct Commerce Partner" on page 64. Use the following information:
 - Username: adonnithorne
 - Password: adonnithorne
 - Confirm Password: adonnithorne
 - Title: Mr
 - First Name: Arthur
 - Last Name: Donnithorne

- Email: adonnithorne@compcom.com
- Functions: Commerce

Creating another Partner

Now that you have created your storefront partners, you can create another partner, their partner administrator, and their users.

1. Login to the Comergent eBusiness System as the bwillow user (password: bwillow) you created in LESSON 1, "Enterprise Users and Their Functions".

The screenshot displays the 'Enterprise Home Page' of the Comergent eBusiness System. At the top, there is a header with 'HOME' and 'COMERGENT E-BUSINESS SYSTEM' logos, along with links for 'Home', 'About', 'Help', and 'Logout'. Below the header, a welcome message reads 'Welcome Brent Willow' with an 'Edit Profile' link. The main content area is divided into several panels:

- Catalog Management Tasks:** A list of tasks with 'Go' buttons: Product Master Management, Product Configurations & Constraints, Price Lists, Pricing Rules, Coupons & Promotional Prices, Advisor Flows & Questionnaires, Promotions, and Task Management.
- Channel Management:** A list of tasks with 'Go' buttons: Organization Lookup and Channel Inventory Collection.
- Analytics:** A list of tasks with 'Go' buttons: Commerce, Sales & Product Dashboards.
- Search for Organization by Name:** A search form with a 'Profile Name' input field, a 'Go' button, and an 'Advanced Search' link.
- Search for User by Name:** A search form with 'Username', 'First Name', and 'Last Name' input fields, a 'Go' button, and an 'Advanced Search' link.
- My Tasks:** A table with columns 'Task ID', 'Name', 'Last Modified', and 'Status'. It includes a 'More' link and an 'Advanced Search' link.

FIGURE 67. Enterprise Home Page

2. Click **Go** in the Search for Organization by Name panel.
The Profile List page appears.

ORGANIZATION PROFILE

Home About Logout

Profile List

Find records that contain: Profile Name [Show All](#) [Advanced Search](#)

[Select All](#) [Deselect All](#)

	Name	Root Profile Name	Type	Level	Commerce Category
<input type="checkbox"/>	Enterprise		Enterprise	Enterprise	Indirect

FIGURE 68. Partner Search Page

3. Click **Create Profile**.

This displays the Organization Profile page.

4. Enter the following partner information:

- Partner name: DataMatrix
- Partner type: Reseller
- Partner level: Gold
- Distributors: Anderel
- Organization ID: M00512A

Notice that you do not have to specify a distributor.

5. Enter the following address information:

- Address line 1: 2632 Leidway Lane
- Address line 2: First Floor
- City: Seattle
- State/Province and Postal Code: WA 98201
- Country: USA

Notice the fields marked with an asterisk (*). These indicate required fields, so that only Address line 1 and Country are required for this address.

6. Click **Save**.

The screenshot shows the 'Organization Profile: DataMatrix' page in the Comergent eBusiness System. The page has a navigation bar with tabs: Info, Addresses, Detail, Business, Hierarchy, Logo, Commerce, Assigned To, Pricelists, and Notes. The 'Business' tab is selected. The main content area is divided into two columns. The left column, titled 'Enter Organization ID', contains fields for 'Profile name' (DataMatrix), 'Main telephone' (N/A), 'Main facsimile' (N/A), 'Organization website address', 'Organization Email', 'Distributors' (a dropdown menu with 'Anderel' selected), and 'Profile type' (Reseller). The right column, titled 'Profile Status', contains a 'Status' dropdown menu (Open) and a 'Reason' text area. Below these is the 'Account Limits' section, which shows 'Currency' (USD), 'Credit Limit' (\$0.00), and 'Available Credit' (\$0.00). There are 'View Users' and 'Save' buttons at the top right of the main content area.

FIGURE 69. Organization Profile Detail Page

7. Click the **Business** tab (Figure 70 on page 74).

The **Business** tab provides information about the business relationship between Matrix Products and the partner.

8. In the upper part of the tab, select North America from the Territories drop-down list.
9. Select the following types from the Customer types drop-down list:
 - General
 - Government
 - Commercial
 - Pharmaceutical
 - Telecommunications
 - High Technology
 - Education

FIGURE 70. Organization Profile: Business Tab

Notice the **Contracts** sub-tab. In this tab, you will enter information about business agreements between Matrix Products and this partner.

10. In the Contracts sub-tab, enter the Name (PRS-RG03013) and Type code (MS-PN002871).

The remaining fields are optional.

11. Click **Duplicate** to create a second contract.
12. Modify the Name (PRS5-RG53018) and Type code (MS5-PN007891).
13. Click **Save**.

The Organization Profile page reappears and the information is saved.

Creating a Partner Administrator for the Partner

As with the previous partners, once you have created the new partner, you will need to create a partner administrator for this partner. The partner administrator has the authority to create partner users who will be able to log into the enterprise site and buy products from the product catalog.

In the last section, we created another partner named DataMatrix. By the end of the last section, the Partner Profile page should appear as in Figure 69 on page 73.

1. Click **View Users**.

This displays the Partner User List page.

2. Click **Create User** to display the User Detail page.

COMERGENT
e-BUSINESS SYSTEM

Home About Logout

Create New User Help

Info

Belongs to: [DataMatrix](#) Cancel Save

NOTE: (*) items are required.

User Information

Username*
Password*
Confirm Password*
Title
Mr.
First name*
Last name*

User Functions

User Locale
Preferred Locale
United States
Note: changes to Preferred Locale will take effect on the next login.
☐ Away

☐ Manager
User Type
User
Functions
☐ Commerce
☐ Sales
☐ Sales Executive
☐ Program Management
☐ Basic Profile Maintenance
☐ Profile Administration

FIGURE 71. Partner User Detail Page

3. Enter the following information about the user:

- Username: acharlton
- Password: acharlton
- Confirm Password: acharlton
- Title: Ms
- First name: Amy
- Last name: Charlton
- Email: acharlton@dm.com

The remaining fields are optional.

4. Among the Functions, click the check box next to **Profile Administration**.

5. Click **Save**.

6. Click **View Users**.

This displays the Partner User List page, showing the new partner administrator.

7. Click **Logout**.

Creating the Partner Users for the Partner

In the last two sections, you have created a partner, and you have created a partner administrator for this partner. In this section, as the partner administrator, you will create two partner users for the DataMatrix partner.

1. Click the **Partner Portal** link on the Comergent eBusiness System home page.
2. Log in as the acharlton user (password: acharlton).

This displays the Partner User Home page.

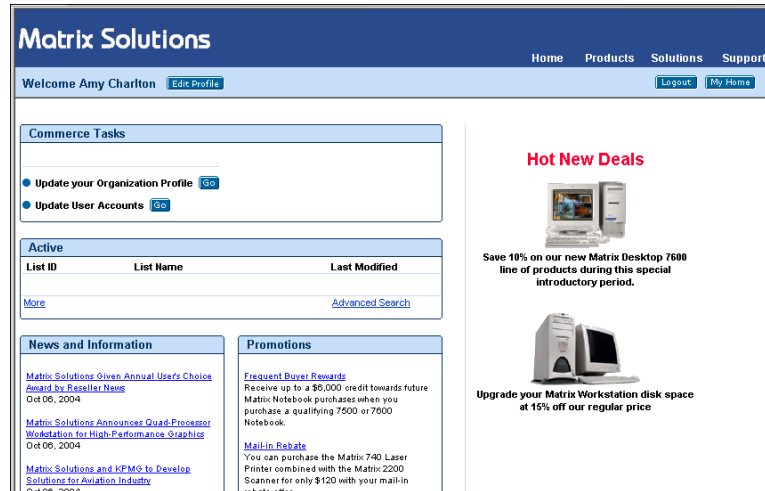


FIGURE 72. Partner Home Page

3. Click **Go** next to Update User Accounts.

This displays the Partner User List page.

4. Click **Create User**.

This displays the Partner User Detail page.

5. Enter the following information:
 - Username: rlasterman
 - Password: rlasterman
 - Confirm: Password: rlasterman

- Title: Mr
 - First Name: Ronald
 - Last Name: Lasterman
 - Email: rlasterman@dm.com
6. Check the Commerce function check box.
 7. Click **Save**.
 8. Click **View Users**.

Notice that there is a new user on the Partner User List page.

Exercises

- Create another partner user for DataMatrix using the steps in "Creating the Partner Users for the Partner" on page 76. Use the following information.
 - Username: rpatel
 - Password: rpatel
 - Confirm Password: rpatel
 - Title: Mr
 - First Name: Raj
 - Last Name: Patel
 - Email: rpatel@dm.com
- Create one more partner using the steps in "Creating another Partner" on page 71. Use the following information:
 - Partner Information:

TABLE 20. Partner Information

Partner Name	Partner Type	Partner Level	Distributor
AffinityNet	Reseller	Platinum	Anderel

- Partner Addresses:

TABLE 21. Partner Addresses

Address Line 1	Address Line 2	City	State/Province and Postal Code	Country
1523 Altura Way		Kansas City	KS 67214	USA

After you enter this information, click **Use as Sold-to Address**. A new box is displayed: Set as Default Sold To Address. Do not click this box.

- Partner Detail:
 - Company ID: MD00488
- Business

TABLE 22. Partner Detail

Territories	Customer types	Contracts	
		Name	Type Code
North America	General Government Commercial Pharmaceutical Telecommunications High Technology Education	PRS-TG02333	MS-PN003981

- Create a partner administrator for the AffinityNet partner, using the steps in "Creating a Partner Administrator for the Partner" on page 74. Use the following information:
 - Username: jcade
 - Password: jcade
 - Confirm Password: jcade
 - Title: Mr
 - First name: John
 - Last name: Cade
 - Email: jcade@affinitynet.com
 - Function: Profile Administration

- Create a partner user for the AffinityNet partner, using the steps in "Creating the Partner Users for the Partner" on page 76. Use the following information:
 - Username: jdark
 - Password: jdark
 - Confirm Password: jdark
 - Title: Ms
 - First Name: Jean
 - Last Name: Darc
 - Email: jdark@affinitynet.com

When you have completed the exercises, you are ready to move on to LESSON 5, "Bringing Partners and Products Together".

Bringing Partners and Products Together

At this point, we have:

- Created an enterprise administrator and several enterprise users.
- Created products for a product catalog.
- Created price lists, added products to those price lists, and set the prices for the products.
- Created partners.
- Created partner administrators and partner users for these partners.

The following table summarizes the partners to this point:

TABLE 23. Summary of Partners

Partner	Type	Users	Purpose
Matrix	Enterprise	admin, ajones, dmorris, bwillow	admin is the user that comes with the installation, ajones, dmorris, and bwillow are enterprise users created by ajones.

TABLE 23. Summary of Partners (Continued)

Partner	Type	Users	Purpose
Anonymous			This partner is used to allow customers to browse the product catalog. At some point in the order process, they register and become a registered user.
Registered		Users who register themselves	These users can buy directly but do not belong to any of the channel partners.
Anderel	Direct	pkelley, cjones, fbencroft	pkelley is a partner administrator; cjones and fbencroft are partner users.
AffinityNet	Direct	jcade, jdarc	jcade is a partner administrator; jdarc is the partner user.
DataMatrix	Direct	acharlton, rlasterman, rpatel	acharlton is a partner administrator; rlasterman and rpatel are partner users.
FirstCommerce	Direct	mpoyser, jspencer	mpoyser is a partner administrator; jspencer is a partner user.
CompCom	Direct	dirwine, adonnithorne	dirwine is a partner administrator; adonnithorne is a partner user.

Browsing the Product Catalog

For this part of the lesson, we will log in as the jspencer (password: jspencer) we created as a partner user for FirstCommerce.

1. Click **Products** at the Matrix Home Page, then log in as jspencer (password: jspencer).
2. Find Browse the Product Catalog, then click **Go**.

If you have done everything right, then you should see the screen appears as it is displayed in Figure 73 on page 83.

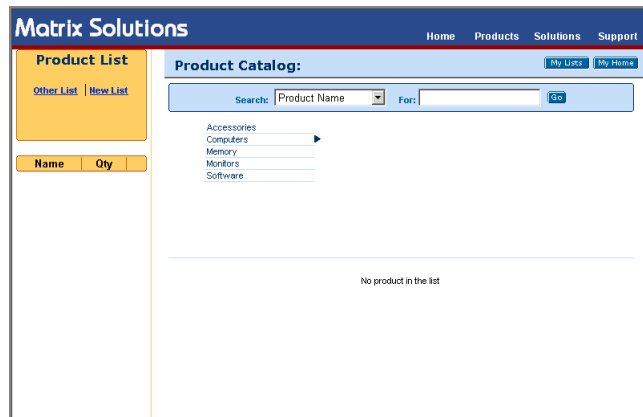


FIGURE 73. Browsing the Product Catalog

Notice the categories that are displayed. These are the categories you created in LESSON 2, "Creating Simple Products". Move the cursor over the categories. Notice the “flyout” menus. Click on one of the categories that has products in it (**Desktops**). The Comergent eBusiness System loads the catalog. Notice the screen now appears as in Figure 73 on page 83.

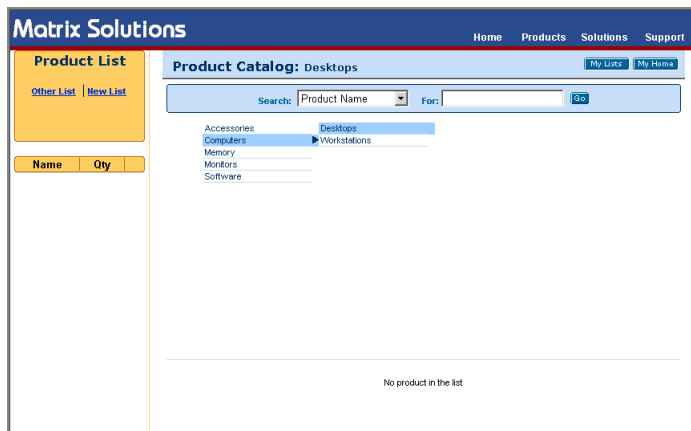


FIGURE 74. Browsing the Product Catalog

Notice that no products are being displayed.

Since price lists (with products assigned to them) are the means by which end-users see products, when the end-user sees no products, it is the result of one the following reasons:

- There are no products.
You created products in LESSON 2, "Creating Simple Products".
- The current date is out of the effectivity date ranges of the products.
In LESSON 2, "Creating Simple Products", when you created products, you assigned effectivity dates for each product. The dates could be incorrect. However, if you followed the instructions in that lesson, then the current date is within the range.
- There are no price lists.
We know there are price lists because we created them in LESSON 3, "Setting Prices for Products".
- The price lists contain no products.
Again, we added products to the price lists in LESSON 3, "Setting Prices for Products".
- The price lists are not active.
When you create a price list, you usually check the **Active** check box. If this check box is not checked, then the price list (and its products) is not active. However, for all the price lists in LESSON 3, "Setting Prices for Products", this check box was checked.
- The current date is out of the effectivity date ranges of the price lists.
The dates we set should mean that we are currently within the range for any price lists.
- This particular partner has not been assigned any price lists.
This is the missing step. We created price lists, and we created partners, but we have not yet made the link between the price lists (and their products) and the partners.

Assigning Price Lists to Partners

In this lesson, we will assign price lists to the partners we created in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users".

1. If you are still logged in as jspencer, then log out.
2. Log in to the Comergent eBusiness System administration as the bwilow user (password: bwilow) you created in LESSON 1, "Enterprise Users and Their Functions".
3. Click **Go** next to Organization Lookup to display the Profile Search page.

The screenshot shows the 'PARTNER PROFILE' section of the Comergent eBusiness System. At the top, there's a navigation bar with 'Home', 'About', 'Help', and 'Logout' links. Below this is the 'Profile Search:' heading, followed by the instruction 'Enter data and click on search button to search'. To the right of this instruction are three buttons: 'Search' (yellow), 'Reset' (blue), and 'Cancel' (blue). The main search area is divided into three sections: 'Search by Profile Name', 'Search by Profile Type', and 'Search by Profile Level'. The 'Search by Profile Name' section has a text input field labeled 'Profile Name:'. The 'Search by Profile Type' section has a list of checkboxes: Distributor, OEM, Reseller, Retailer, Systems Integrator, SystemPartner, and Not Applicable. The 'Search by Profile Level' section has a list of checkboxes: Platinum, Gold, Silver, Tin, and Not Applicable. The 'Search by Product Category' section is currently empty.

FIGURE 75. Profile Search Page

4. Click **Search** to display all the partners you created in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users".

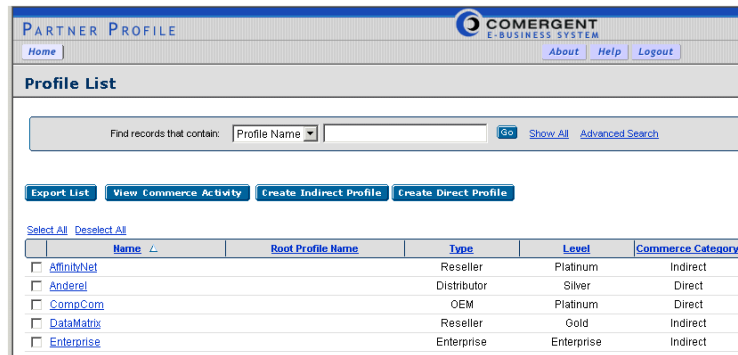


FIGURE 76. Profile Search Results Page

Notice that the list contains three standard partners:

- AnonymousUserPartner

This is a system-generated partner that enables anonymous users to browse the product catalog and purchase products from the catalog. Once the anonymous user has filled a product inquiry list, before they can complete an order, they will be required to register. From then on, they become a registered user.

- RegisteredUserPartner

This is a system-generated partner that enables registered users to log in and purchase products from Matrix Solutions.

- EnterprisePartner

This partner is system-generated. The Enterprise Master List is automatically assigned to it. This is the partner to whom admin, as well as any enterprise users you create, belong.

The first stage is to assign price lists to the system-generated partners.

5. Click the AnonymousUserPartner link.
6. Click the **Price Lists** tab.

The Partner Price Lists page is displayed with the list of price lists you created in LESSON 3, "Setting Prices for Products".

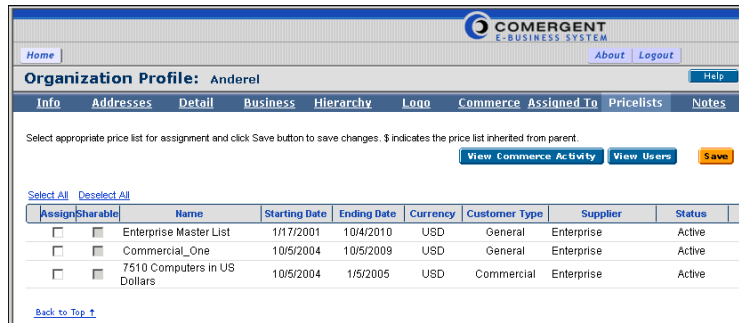


FIGURE 77. Partner Price Lists Page

7. Check the check box next to the Enterprise Master List.
8. Click **Save**.

The Organization Price Lists page is re-displayed. The price list is assigned to the partner.

9. Click **Home**.
10. Click **Go** next to Organization Lookup to display the Profile Search page.
11. Click **Search** to display the full list of profiles.



FIGURE 78. Profile Search Results Page

12. Click the RegisteredUserPartner link.

This displays the Partner Profile page for the RegisteredUserPartner.

13. Click the **Pricelists** tab.

The Profile Detail page is displayed with the list of price lists you created in LESSON 3, "Setting Prices for Products".

The screenshot shows the 'Organization Profile: Anderel' page in the Comergent e-Business System. The 'Pricelists' tab is selected. The page displays a table of price lists for assignment. The table has columns for 'Assign', 'Shareable', 'Name', 'Starting Date', 'Ending Date', 'Currency', 'Customer Type', 'Supplier', and 'Status'. There are three price lists listed: 'Enterprise Master List', 'Commercial_One', and '7510 Computers in US Dollars'. The 'Enterprise Master List' and '7510 Computers in US Dollars' have checkboxes in the 'Assign' column that are currently unchecked. The 'Commercial_One' has a checked checkbox. The 'Shareable' column has checkboxes for each row, all of which are checked. The 'Status' column shows 'Active' for all three price lists. There are buttons for 'View Commerce Activity', 'View Users', and 'Save' at the bottom right of the table. A 'Back to Top' link is at the bottom left.

Assign	Shareable	Name	Starting Date	Ending Date	Currency	Customer Type	Supplier	Status
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Enterprise Master List	1/17/2001	10/4/2010	USD	General	Enterprise	Active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Commercial_One	10/5/2004	10/5/2009	USD	General	Enterprise	Active
<input type="checkbox"/>	<input checked="" type="checkbox"/>	7510 Computers in US Dollars	10/5/2004	1/5/2005	USD	Commercial	Enterprise	Active

FIGURE 79. Partner Profile Page: Price Lists Tab

14. Check the box next to the Enterprise Master List.

In general, the RegisteredUserPartner should always be assigned any price lists that are assigned to the AnonymousUserPartner. This is because, before anonymous users can complete an order, they must become registered users. If an anonymous user selects a product that is not on any price list assigned to the RegisteredUserPartner, then the price will show as N/A after they have registered.

15. Check the box next to the 7510 Computers in US Dollars list.

Typically, in addition to assigning the same price lists as those assigned to the AnonymousUserPartner, you would also assign additional price lists only to the RegisteredUserPartner. In this way, users could get special prices by being registered.

16. Click **Save**.

Exercises

Use the procedures in "Assigning Price Lists to Partners" on page 84 to make the following assignments:

TABLE 24. Assigning Price Lists

Price List	Assign To
Enterprise Master List	AffinityNet, FirstCommerce, CompCom, Anderel
Commercial_One	Anderel, DataMatrix

Browsing the Product Catalog with Price Lists

If you have followed the steps and have done the exercises, then the partner users should be ready to log in and browse the product catalog.

1. Log in as the direct commerce end-user adonnithorne (password: adonnithorne) from the partner CompCom.

This displays the end-user home page.

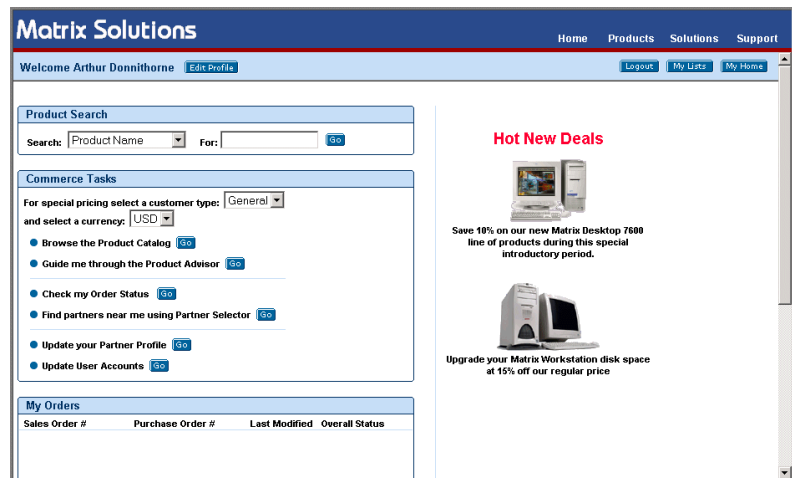


FIGURE 80. End-User Home Page

Notice the Customer Type and Currency Code settings. When end-users browse the product catalog, the catalog displays products from price lists whose Customer

Type and Currency Code match these settings. If the drop-down list contains more than one selection, then you can select different settings to browse from other products and prices from price lists that match the selected settings.

If you select settings that match more than one price list, then the products on the lists will be concatenated when you browse. If the multiple price lists have the same products, then the lowest price will be displayed for each product.

2. Click **Go** next to Browse the Product Catalog.
3. Move the cursor over the flyout menus at the top of the page.
4. Click Workstations.

In Figure 81 on page 90, notice the products (two workstations) are displayed. This coincides with the two workstations that are on the Enterprise Master List assigned to the FirstCommerce partner. Notice the prices. These are prices from the Enterprise Master List.

The screenshot shows the 'Matrix Solutions' website. The top navigation bar includes 'Home', 'Products', 'Solutions', and 'Support'. Below this, the 'Product List' sidebar on the left has links for 'Other List' and 'New List', and a table with columns 'Name' and 'Qty'. The main content area is titled 'Product Catalog: Workstations' and features a search bar with a 'Go' button. A flyout menu is open, showing 'Computers' selected, with 'Workstations' highlighted. Below the menu, a table lists two workstation products with their descriptions, unit prices, and quantities. Each product has an 'Add to List' button. At the bottom, there is a 'Compare' button and a 'Show Product Images' checkbox.

Product Name	Product ID	Description	Unit Price	Qty	
<input type="checkbox"/> Matrix 7510 Workstation	MOWS-7510	The Matrix 7510 Workstation comes standard with an Intel Pentium III Processor 866MHz, 128MB RAM, 10GB hard drive, 16X CD-ROM drive, 16MB nVidia TNT2 M64 graphics card, and a 15" Monitor.	\$2,699.10	<input type="text" value="1"/>	Add to List
<input type="checkbox"/> Matrix 7530 Workstation	MOWS-7530	The Matrix 7530 Workstation comes standard with an Intel Pentium III Processor 866MHz, 192MB RAM, 20GB hard drive, 16X CD-ROM drive, 16MB nVidia TNT2 M64 graphics card, and a 17" Monitor.	\$2,849.05	<input type="text" value="1"/>	Add to List

FIGURE 81. Browsing the Product Catalog

5. Return to the End-User Home page and log out.

Now let us see what happens when we log in as another end-user.

6. Log in as the direct commerce end-user jspencer (password: jspencer) from the partner FirstCommerce.
7. Click **Go** next to Browse the Product Catalog.
8. Move the cursor over the flyout menus at the top of the page.
9. Click **Workstations**.

Compare the prices for MXWS-7510: notice the difference in prices between that seen by jspencer (\$1,052.19) and adonnithorne (\$1,169.10). Remember that, in "Modifying the Enterprise Master List" on page 49, you set a special price (a conditional price) for this product for partners whose partner type was Retailer and whose partner level was Platinum. CompCom, is an OEM and Platinum, whereas FirstCommerce, is a Retailer and Platinum. Therefore, the end-user for FirstCommerce, jspencer, gets the conditional price.

Exercises

- Now that you have seen how price lists affect the products and prices that end-users see, experiment with the concept. Create some new products, then create a new price list and add the new products to the new list. Now see if you can make them appear for one partner user exclusively. Now make them appear for another partner user exclusively.
- Using the procedures in LESSON 3, "Setting Prices for Products", create some more conditional prices that will apply to one of the partners created so far. Log in as a partner user of that partner and find the conditional price as you browse the product catalog.

Creating Product Models

In previous lessons, you have learnt how to create products in the Comergent eBusiness System. The products have been simple products and they are not configurable: customers cannot customize the product by selecting choices that the product offers to ensure that the product precisely meets their needs. The Visual Modeler application enables you to create configurable products. In this lesson, we create a configurable product: this comprises the following steps:

1. Create the product
2. Create the product model
3. Test the product configuration experience

Once we have created and tested the basic model, the lesson continues by demonstrating the use of more advanced configuration options and UI controls that help you manage the customer's experience as they configure the product. These topics are:

- "Properties" on page 99
- "Rules" on page 100
 - "Creating a Rule" on page 101
 - "Using Rules to Control Display of Option Items" on page 102
- "UI Controls" on page 107

- "Display Properties" on page 107
- "Tabular Displays" on page 108
- "Calculated Property Values" on page 109
- "User-Entered Values" on page 112
- "Images" on page 116

Create a Configurable Product

In this section, we create the product.

1. Log in as the admin user.
2. Navigate to the **Computers -> Workstations** product category.
3. Click **Create New Product**.
4. Enter the following:

TABLE 25. Product Data

Product ID	Product name	Description
MXWS-7700	Matrix Graphics Workstation	This highly configurable workstation is designed to meet your performance needs.

5. Select Configurable from the Component Type drop-down list.
6. For the moment, ignore the Model drop-down list.
7. Select Released from Status drop-down list.
8. Click **Save and Return**.
9. Click **Home** to return to the enterprise home page.

Create the Model

1. Click **Go** next to Product Configurations & Constraints.
The Visual Modeler administration page is displayed.
2. Click **New Model Group**.
3. Enter Computers in the Name and Description fields and click **Save**.

4. In the model group hierarchy tree, select the Computers node.
5. Click **New Model Group**.
6. Enter Workstations in the Name and Description fields and click **Save**.

Note that we are creating hierarchy of model groups that mirror the hierarchy of product categories. This is not necessary, but can often help to maintain the organization of models and the products to which they correspond.

7. In the model group hierarchy tree, select the Workstations node.
8. Click **New Model**.
9. Click **Browse....**
10. In the product picker window that opens up, navigate to the Computers -> Workstations product category and select the MXWS-7700 product.
11. Click **Done**.

Notice that the Assigned Product ID field now reads MXWS-7700 and the Name and Description fields are populated with the name and description of the MXWS-7700 product.

12. Click **Save**.

The new model, MXWS-7700, is displayed in the model panel.

13. Select the MXWS-7700 model and click **Edit** on the Visual Modeler toolbar.
14. The Model Detail page is now displayed.



FIGURE 82. Visual Modeler Model Detail Page: General Info Tab

To begin our modelling, we will create an option class and two option items in the option class: this will enable customers to choose between two different monitors to go with their workstation.

15. Click **New Option Class**.

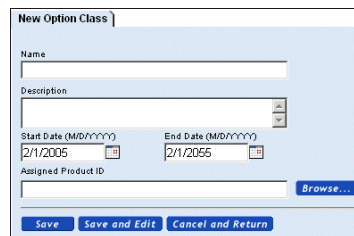


FIGURE 83. Visual Modeler Model Detail Page: New Option Class Tab

16. Enter Monitors in the Name field and enter “Please select a monitor.” in the Description field.

17. Click **Save**.

The option class is created and added to the model tree in the Model navigation panel. Now we will create two option items in this option class: these will represent the selectable items that user may select.

18. Select the Monitors option class in the model tree.

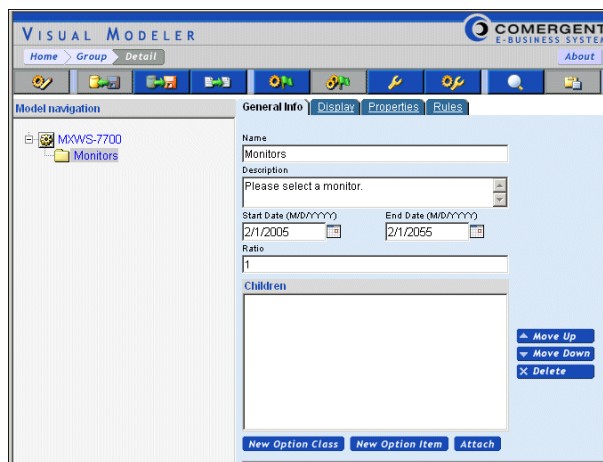


FIGURE 84. Visual Modeler Option Class Page: General Info Tab

19. Click **New Option Item**.

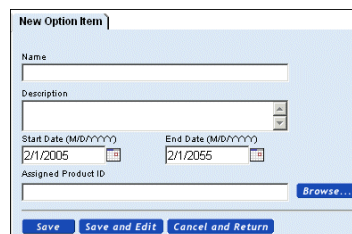


FIGURE 85. Visual Modeler Model Detail Page: New Option Item Tab

20. Enter Optquest Q95 in the Name and Description fields.

21. Click **Save**.

22. The New Option Item tab is re-displayed. This time, enter Optiquest Q115 in the Name and Description field.
23. Click **Save**.
24. If you examine the Model navigation tree, you see that the model is now displayed with one option class and two option items.

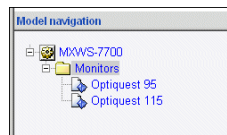


FIGURE 86. Model Navigation Tree

Now we are ready to compile and test this simple model.

25. Click **Compile**.

Behind the scenes, an XML file is generated that holds the structure of this model. Each time we make changes to the model, we must re-compile the model so that our changes will become part of the customer's configuration experience.

26. Click **Test**.

A second browser window is displayed: this is the configuration experience that customers will have when they configure the MXWS-7700 product.

A screenshot of a web application titled 'Matrix Graphics Workstation'. At the top right, it says 'Errors: 0 Warnings: 0 Suggestions: 0'. Below this is a message box that says 'No errors'. A status bar shows 'Price as configured: \$0.00' and 'Lead Time: 0.0 day(s)'. There are several buttons: 'Set Defaults', 'Show Trace Log', 'Show Messages', 'Clear', 'Update', 'Summary', and 'Add to List'. The main content area is titled 'Please select a monitor.' and contains three radio button options: 'None \$0.00', 'Optiquest 95 \$0.00', and 'Optiquest 115 \$0.00'. The 'None' option is selected.

FIGURE 87. Visual Modeler Test Model Page

As you can see, this page provides a UI in which customers can select either of the two monitors (or neither), and the text displayed on the page is the descriptions that we provided for the option class and option items.

27. Close this window.

This completes the creation of the basic model. Next we must hook it up to the product.

28. Click **Home** to return to the Enterprise Home page.

29. In the Product manager, navigate to the Product Detail page for the MXWS-7700 product.

30. In the Model drop-down list, select “Computers/Workstations/MXWS-7700”.

31. Click **Save Changes**.

You have completed the basic setup of this configurable product. If a customer selects the MXWS-7700 product and adds it to their inquiry list, then they will be able to configure it by choosing between the two monitor models provided.

The following sections will provide an in-depth tutorial of the various advanced features of the Visual Modeler. They cover:

- "Properties" on page 99
- "UI Controls" on page 107

Properties

Most of the customer’s experience of configuring a product is determined by properties: these are attributes of the model, its option classes, and option items, and they are used to determine how rules fire, the behavior of the UI, and information that can be displayed to the user.

Use the *Comergent eBusiness System Administration Guide* to understand how to attach properties to a model. This section describes their use to control how the model behaves when it is configured.

For the sections on rules and UI controls below, please create and attach the following properties to the MXWS-7700 model:

TABLE 26. MXWS-7700 Properties

Property	Definition	Definition Location	Attach Location with Value
Monitor Size	Number	MXWS-7700	Optiquest Q95: 19
			Optiquest Q115: 21

TABLE 26. MXWS-7700 Properties

Property	Definition	Definition Location	Attach Location with Value
Maximum Resolution	String	MXWS-7700	Optiquest Q95: 1024 x 768
			Optiquest Q115: 1280 x 1024
Monitor Weight	Number	MXWS-7700	Optiquest Q95: 8.3
			Optiquest Q115: 7.2
Maximum Weight	Number	MXWS-7700	MXWS-7700: 0
RequiresXVGA	Number	MXWS-7700	Do not attach

Rules

The Visual Modeler provides you with the ability to precisely control the customer's selections so that the selections that they make are compatible with each other and that as user's make selections, they see selections that are related.

For example, suppose that you want to ensure that customers pick a good graphics card to go with their monitor. You can create a rule based on their monitor selection that displays an graphics card option class that displays only compatible graphics cards. Alternatively, you can create a constraint table that specifies which monitor can be selected with which graphics card.

Before continuing this section, create a new option class and two option items as follows:

TABLE 27. Graphics Card Option Class

Option Class	Property Definition	Option Item	Property Value
Graphics Cards	Resolution	GC-1000	Resolution: VGA
		GC-2000	Resolution: XVGA
		GC-3000	Resolution: XVGA

On the Display tab, set the option class Option Class Display property to Invisible by selecting it from the drop-down list.

On the Monitors, create a new property as follows:

TABLE 28.

Option Class	Property Definition	Option Item	Property Value
Monitors	IsPicked	Optiquest Q95	1
		Optiquest Q115	1

Creating a Rule

The first rule we make is to show the Graphics Card option class if a user selects one of the monitor option items.

1. Navigate to the model MXWS-7700.
2. Click the Rules tab.
3. Click the Define sub-tab.
4. Click **New...**

FIGURE 88. Model Detail Page: New Rule Tab

5. Enter the following information:
 - a. Name: Display Graphics Card
 - b. Description: Display the Graphics Card option class if a monitor is selected.
6. Click **Save**.

7. Select Rule Triggered on: Success.

8. Click **New Fragment**.

9. Specify the fragment as:

```
value(IsPicked) >= 1 in any location
```

10. If not specified: Rule is false.

11. Click **Save and Return**.

We want the rule to assign the `_isVisibleable` property to the Graphics Cards option class if the rule is true, so define the assignment action like this:

12. In the Assignment Actions panel, select `_isVisibleable` property from the drop-down list.

13. Enter 1 for the Value.

14. Click the ... button next to the Assign To field, and in the pop-up window, navigate to the Graphics Card option class. Select it and click **Done**.

The Assign To field is populated with the value `“*.Graphics Cards”`.

15. Click **Add Item**.

16. Click **Save**.

Having defined the rule, now we must attach it to the model.

17. Select the Model MXWS-7700 from the navigation panel, and click the Rules tab.

18. On the Attach sub-tab, select the Display Graphics Card rule from the drop-down list, and click **Attach**.

19. Click **Save All Changes**.

Now compile and test the model. You see that the Graphics Card option class is hidden until you select a monitor, and then it is displayed so that a graphics card can be selected.

Using Rules to Control Display of Option Items

You can use assignment actions to control the display of option items: this gives you the ability to ensure that customers only make valid selections. In "Creating a Constraint Table" on page 105 we demonstrate an alternate approach using constraint tables. In this section, we use a rule with an assignment action to ensure that a customer will only pick valid combinations of graphics cards and monitors.

For the purposes of this example, our rule will say that if you select a monitor whose maximum resolution is 1280 x 1024, then you must select a graphics card that supports X VGA.

1. Navigate to the model MXWS-7700.
2. Click the Rules tab.
3. Click the Define sub-tab.
4. Click **New...**
5. Enter the following information:
 - a. Name: Display Compatible Graphics Cards
 - b. Description: This rule ensures that only graphics cards that support each monitor are displayed.
6. Click **Save**.
7. Select Rule Triggered on: Success.
8. Click **New Fragment**.
9. Specify the fragment as:

```
value(Maximum Resolution) = literal(1280 x 1024)
```

10. Click **Save and Return**.

If the rule is true, then we want the rule to assign the RequiresXVGA property to the model, and then have a rule that ensures that only compatible graphics cards option items are displayed, so define the assignment action like this:

11. In the Assignment Actions panel, select the RequiresXVGA property from the drop-down list.
12. Enter 1 for the Value.
13. Click the ... button next to the Assign To field, and in the pop-up window, navigate to the MXWS-7700 model. Select it and click **Done**.

The Assign To field is populated with the value “MXWS-7700”.

14. Click **Save**.
15. Now attach this rule to the model.

So far, we have created a rule that tells the model that if certain monitors are selected, then the graphics card that is selected must support X VGA. Now we

create a rule that can be attached to each graphics card option item that determines whether it can be displayed.

1. Navigate to the model MXWS-7700.
2. Click the Rules tab.
3. Click the Define sub-tab.
4. Click **New...**
5. Enter the following information:
 - a. Name: Display if Support X VGA
 - b. Description: Display this card if X VGA support is required and the card supports X VGA.
6. Click **Save**.
7. Select Rule Triggered on: Failure.
8. Click **New Fragment**.
9. Specify the fragment as:

```
value(RequiresXVGA) = literal(1) in relative location
```

10. Set **If not specified** to Rule is true.

In effect, this says that if the RequiresXVGA property is not set, then assume that all graphics cards are valid selections.

11. Click **Save**.
12. Click **New Fragment**.
13. Specify the fragment as:

```
propval(Resolution) = literal(XVGA) in any location
```

Note that we have to use the propval function here rather than value: this is because the option item will not have been picked at the time the rule fires.

14. Click **Save**.
15. In the Assignment Actions panel, select `_isViewable` property from the drop-down list.
16. Enter 0 for the Value.
17. Leave the Assign To field value blank. This is to indicate that the property is at the node at which the rule is attached.

18. Click **Save**.
19. Now attach this rule to the each graphics card.

Before compiling our model, the last thing we have to do is to manage the order in which the rules fire. We want to ensure that the rule that tests to see if XVGA is required fires before the rules that determine if each graphics card option item is compatible.

20. Navigate to the Model node.
21. Click the Rules tab.
22. Click the Firing Sequence sub-tab.
23. Change the Priority value of the Display Compatible Graphics Cards rule to 10.

This ensures that this rule will fire first.

Now compile and test the model. You see that the Graphics Card option class is hidden until you select a monitor, and then it is displayed so that a graphics card can be selected. If you select the Optquest Q115 monitor, then the GC-1000 graphics card is not displayed.

Creating a Constraint Table

Not all of the graphics cards may be compatible with all of the monitors, and so you want to specify what combinations of monitors and graphics cards are acceptable. In this section, we create a constraint table to express this.

Assume that the following combinations of Graphics Card and Monitor are compatible:

TABLE 29. Compatible Selections From Graphics Cards and Monitors

Compatible?	Optquest Q95	Optquest Q115
GC-1000	Yes	No
GC-2000	Yes	Yes
GC-3000	Yes	Yes

You can express constraint tables either by specifying what option items can be selected together or which cannot. In this example, it is easier to specify that GC-1000 and Optquest Q115 cannot be selected together: the other selections are assumed to be compatible.

1. Navigate to the model MXWS-7700.

2. Click the Tables tab.
3. Click **New...**
4. Enter the following information:
 - a. Name: Graphics
 - b. Description: Constrains the selection of graphics cards and monitors.
 - c. Message: You cannot select this combination of graphics card and monitor.
5. Click **Save Changes**.
6. Click the Records tab.
7. Select Monitors from the Table Column Name drop-down list and click **Add**.
8. Select Graphics Cards from the Table Column Name drop-down list and click **Add**.

The screenshot displays the 'Model Detail Page' with the 'Tables' tab selected. The 'Name' field is set to 'Graphics'. Below this, the 'Records' sub-tab is active. The 'Table column name' is set to 'Monitor Weight'. There are buttons for 'New Constraint' and 'Reorder'. A table lists columns: 'Monitors' and 'Graphics Cards'. The 'Column Order' is set to 1 for 'Monitors' and 2 for 'Graphics Cards'.

Seq	Action	Valid	Monitors	Graphics Cards
Column Order:			1	2

FIGURE 89. Model Detail Page: Tables Tab and Records Sub-Tab

9. Click **New Constraint**.
10. Click **Edit**.

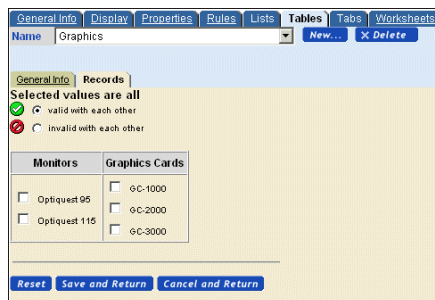


FIGURE 90. Model Detail Page: Tables Tab and Records Sub-Tab

11. Select the **invalid with each other** radio button, and check the Optiquet Q115 and GC-1000 check boxes.
12. Click **Save and Return**.

Now compile and test the model. You see that the Graphics Card option class is hidden until you select the Optiquet Q115 monitor, and then it is displayed so that a graphics card can be selected. You see that the GC-1000 option item is displayed with a clickable icon that indicates that it should not be selected. If you do select it, then an error message is displayed. You can click the icon to ask the Comergent eBusiness System to help resolve the conflict: in this case, it will suggest an alternate selection of monitor.

UI Controls

The Visual Modeler provides a rich set of controls that can provide a flexible and attractive UI to help customers make their selections. This section describes how to use them. It covers:

- "Display Properties" on page 107
- "Tabular Displays" on page 108
- "User-Entered Values" on page 112
- "Images" on page 116

Display Properties

Each model, option class, and option item has a set of properties that determine how the configurable product will be displayed to the customer: these are known as

display properties. A complete description of the display properties are provided in the *Comergent eBusiness System Administration Guide*. Every display property corresponds to a UI property as indicated below.

Pre-Pick Guiding Text

Suppose that you want to provide some text to help customers make a selection, but to remove the text once the customer has done so.

1. Navigate to the Monitors option class.
2. Enter the following in the Pre-Pick Guiding Text field: “The larger the monitor, the easier it is to manage multiple displays on it.”
3. Click **Save**.

If you now compile and test the model, then you will see that this text is displayed when you first display the model. However, if you select one of the monitors, then when the page is re-displayed, you can see that the text is now removed.

This display property corresponds to the UI: PRE_PICK GUIDING TEXT property.

Ignore in Quote

By default, option classes and option items are displayed in the customer’s inquiry list when they completed their product configuration and put their configured product in their inquiry list. If you do not want an option class to be displayed in the customer’s cart, then do this:

1. Navigate to the Monitors option class.
2. Check the Ignore In Quote check box.
3. Click **Save**.

If you now compile and test the model, then you will see that the monitor class is displayed. However, if you click the Summary button, then the Monitors option class is not displayed on the Summary page (though any option items picked are).

This display property corresponds to the UI: IGNORE IN QUOTE property.

Tabular Displays

Suppose that you would like to display the monitor option items with some of their properties to help users choose between them. You can do this in the form of a table as follows.

1. Navigate to the Monitors option class.
2. Select Tabular Display from the UI control drop-down list.
3. Click **Save All Changes**.
4. In the Tabular Display Control Settings section of this page, enter:
 - a. Column Headings: Size;Resolution
 - b. Column Properties: Monitor Size;Maximum Resolution
 - c. Column Alignment: Left;Left
5. Click **Save All Changes**.
6. Click **Compile and Test**.

The screenshot shows a web-based interface titled "Graphics workstation". At the top right, it displays "Errors: 0 Warnings: 0 Suggestions: 0". Below the title bar, there is a message area that says "No errors". A status bar shows "Price as configured: \$0.00" and "Lead Time: 0.0 day(s)". To the right of the status bar are buttons: "Set Defaults", "Show Trace Log", "Show Messages", "Clear", "Update", "Summary", and "Add to List". The main content area is titled "Please choose a monitor" and contains a table with the following data:

Name	Size	Resolution
Optquest G95	19.0	1280 x 1024
Optquest G75	17.0	1024 x 768

FIGURE 91. Tabular Display of Properties

Note that the option items are not selectable in this display. You probably want to add a second option class that makes them selectable.

Calculated Property Values

The Visual Modeler provides a simple, yet powerful, means to use property values to calculate other property values. In this section, we show how use this mechanism to display extra information to customers. Suppose that you know that for each monitor, you know the diagonal linear dimension (d) of the monitor, but you want to present to the customer the total area (A) of the monitor screen. This can be approximately calculated as $A = d^2/2$. You can do this along these lines:

1. Navigate to the Monitors option class.
2. Define a numeric property called Monitor Area.
3. Attach this property to the two monitors.

4. Click the Display tab.
5. Change the column properties as follows:
 - a. Column Headings: Size;Area;Resolution
 - b. Column Properties: Monitor Size;Monitor Area;Maximum Resolution
 - c. Column Alignment: Left;Left;Left
6. Navigate to the model node and create a worksheet as follows:
7. Click the Worksheets tab.
8. Click **New...**
9. Enter the following information:
 - a. Name: Calculate Area
 - b. Click **Create**.
10. Click **Add Column** and add first Monitor Size and then Monitor Area.
11. Click Add Row and, using the entity picker, add the monitor option items.
12. In the first row and Monitor Area column, click the Edit Property Value button.

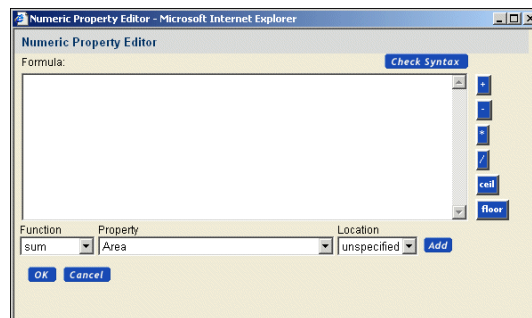


FIGURE 92. Numeric Property Editor Window

13. Enter “=” as the first character in the text area.
14. In the Numeric Property Editor window, select the value Function, Monitor Size Property, and the unspecified Location and click **Add**.
15. Click * from the mathematical symbols along the side.

16. In the Numeric Property Editor window, select the value Function, Monitor Size Property, and the unspecified Location and click **Add**.
17. Click / from the mathematical symbols along the side.
18. Enter 2.

You should see the following in the text area:

```
value("Monitor Size")*value("Monitor Size")/2
```

19. Click **OK**.
20. In the second row and Monitor Area column, click the Edit Property Value button and repeat the steps above for this monitor.
21. Click **Save All Changes**.

If you now compile and test the model, then you will see that the Monitors option class is displayed as a three-column table, and the Area column is calculated from the Size column.

You can also use Java classes in the Numeric and String Editor windows. For example, suppose, that the monitors are circular, and the Monitor Size (d) property is the radius of the monitor. Then the area (A) should be calculated as $\pi * d * d$.

You can modify the Monitor Area property formula to read:

```
=java.lang.Math.PI*value("Monitor Size")*value("Monitor Size")
```

To make this more readable, you can use a string-formatting expression to define a more readable property as follows.

1. Navigate to the Monitors option class.
2. Define a new String property called Monitor Area String.
3. Navigate to the MXWS-7700 model and click the Worksheet tab.
4. Add a new column to the worksheet by adding the Monitor Area String property.
5. In the first row and Monitor Area String column, click the Edit Property Value button.

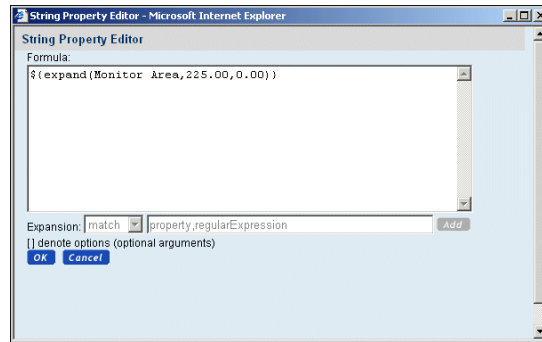


FIGURE 93. String Property Editor Window

6. Enter “\${expand(Monitor Area,225.00,0.00 inches)}” in the text area.
7. Click **OK**.
8. Now navigate to the Column Properties field on the Monitors class Display tab, and change it to:
Monitor Size;Monitor Area String;Maximum Resolution

If you now compile and test the model, then you will see that the Monitors option class is displayed as a three-column table, and the Area column is calculated from the Size column and displayed in the form 1134.11 inches.

User-Entered Values

You may want to permit customers to enter values for properties: these can be used to check user requirements against rules that determine whether option items match the requirements. To do so, you must specify that the relevant option class UI Control is a User Entered Value, and then at the option item level, specify how the user-entered value is bound to a property. Typically, you want to bind the value to a property that can be used in a model rule.

For example, suppose that you want enable users to specify a maximum weight for their computer monitor. You can do this as follows:

1. Create an option class called Monitor Weight.
2. On its Display tab, select User Entered Values from the UI Control drop-down list.
3. Set the Number of Columns display property to 2.

4. Click **Save All Changes**.
5. Create a single option item below this option class: call it Weight.
6. On the Display tab, in the User Entered Value Settings section, enter:
 - a. For the User Entered Value Type, select Numeric
 - b. Assign Value to Property: *.Maximum Weight
This references the Maximum Weight property which is attached at the model level.
 - c. Text before Entry Field: Enter the maximum weight for the monitor in kg.
7. Click **Save All Changes**.

If you compile and test this model, you will see the following option class section:

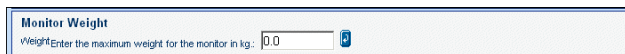


FIGURE 94. User Entered Value Option Class

To show how the user-entered value can be used:

8. Create the following rule:
 - Name: Maximum Weight at Model
 - Triggered on: Failure
 - Fragment: In Function1, select value, Monitor Weight, any from the drop-down lists and in Function2, select value, Maximum Weight, MXWS-7700, so that the rule reads:
`value(Monitor Weight) <= value(MXWS-7700.Maximum Weight)`
 - Error message: The selected monitor exceeds your specified maximum weight.
9. Save this rule.
10. Attach this rule at the MXWS-7700 node.

When you compile and test this model, you will see that depending on your choice of monitor and the value you enter for the maximum weight of the monitor, an error message is displayed when the monitor weight exceeds the maximum weight.

What happens here is that when a customer specifies a value in the Weight text field and updates the model, is that the value they enter is assigned to the MXWS-7700.Maximum Weight property, and then the rule compares this value to the value of the Monitor Weight property defined anywhere in the model. In this case, the only place where Monitor Weight has been attached to the nodes is at the two monitor option items, and so the value of the Monitor Weight property at the selected monitor node is used.

An alternative approach to writing this rule is to specify that the Monitor Weight property should be retrieved from the point where the rule is attached and then attach this version of the rule to each of the monitor option items. try this as follows:

11. Detach the rule Maximum Weight at Model rule from the model, so that it does not participate in the rule firing process.
12. Create the following rule:
 - Name: Maximum Weight at Monitor
 - Triggered on: Failure
 - Fragment: In Function1, select value, Monitor Weight, relative from the drop-down lists and in Function2, select value, Maximum Weight, MXWS-7700, so that the rule reads:

value(.Monitor Weight) <= value(MXWS-7700.Maximum Weight)
 - Error message: The selected monitor exceeds your specified maximum weight.
13. Save this rule.
14. Attach this rule at the monitor option item nodes.

When you compile and test this model, you will see that depending on your choice of monitor and the value you enter for the maximum weight of the monitor, an error message is displayed when the monitor weight exceeds the maximum weight.

What happens in this case is that when a customer specifies a value in the Weight text field and updates the model, is that the value they enter is assigned to the MXWS-7700.Maximum Weight property, and then the rule compares this value to the value of the Monitor Weight property defined at the node where this rule is attached. In this case, the only place where Monitor Weight has been attached to the nodes is at the two monitor option items, and so the value of the Monitor Weight property at the selected monitor node is used.

Restricting User Entered Values

Some of the time you may want to restrict the possible values that a customer can enter in a user-entered value field. You can do this using the Allowed Values display property.

1. Navigate to the Weight option item of the Monitor Weight option class and click the Display tab.
2. In the Allowed Values display property field, enter: 0-20.

When you compile and test this model, you see that the Weight text field is now a drop-down list which is populated by integer values from 0.0. to 20.0. A customer can only select one of these values, and when they do, their selection is automatically submitted to the server.

As another example, suppose that you want another user-entered value field for a customer's color preference, and again you want to indicate that the customer must select only from a choice of colors. Do the following:

1. Create an option class called Color.
2. On its Display tab, select User Entered Values from the UI Control drop-down list.
3. Click **Save All Changes**.
4. Create a single option item below this option class: call it Color Choice.
5. On the Display tab, in the User Entered Value Settings section, enter:
 - a. For the User Entered Value Type, select String
 - b. Enter Black,Blue,Green,Red,White in the Allowed Values field.
 - c. Assign Value to Property: *.Color
This references the Color property which you can define and attach at the model level.
 - d. Text before Entry Field: Select your preferred color.
6. On the Properties tab, select the UI: SUPPRESS UEV NONE VALUE property and enter yes for its value, and click **Attach**.
7. Click **Save All Changes**.

When you compile and test this model, you see the new Color option class, and a drop-down list of values from which the customer can make their selection. Note that None is not a selectable item.

Images

You can associate images with a model, option class, or option item simply by specifying the Image display property: this takes as values relative URLs or absolute URLs:

- If you begin the URL with “http://”, then the URL is assumed to be absolute;
- If you begin the URL with “/”, then the URL is interpreted relative to the servlet container;
- If you begin the URL without either, then the URL is interpreted relative to the current URL.

TABLE 30.

Image Value	URL
http://webserver:port/images/4Stars.gif	http://webserver:port/images/4Stars.gif
/images/4Stars.gif	http://server:port/images/4Stars.gif
4Stars.gif	http://server:port/en/US/images/4Stars.gif

At the model or option class level, the Image display property corresponds to the UI: ICON GRAPHIC property. At the option item level, the Image display property corresponds to the UI: ITEM IMAGE NAME property. Note that if you define an Image display property at the option item level, then you must also set the UI: SHOW ITEM IMAGES property to be true at the option class level.

Layout Management

You can use UI properties to manage the basic layout of a configurable product. By specifying the numbers of rows and columns each option class occupies, and by specifying the number of columns on the page, you can fine-tune the look-and-feel of your page without touching the underlying JSP page.

In this section, we will add another option class, and then manage the page layout so that the Monitors option class occupies all of the first row and the other two option classes occupy the second row.

First, create new option classes as follows:

TABLE 31. Processors Option Class

Option Item Name	Description
Pentium 4 2 GHz	Pentium 4 2.8 GHz
Pentium 4 2A GHz	Pentium 4 2.8A GHz
Pentium 4 2C GHz	Pentium 4 2.8C GHz

TABLE 32. RAM Option Class

Option Item Name	Description
SDRAM 256MB	SDRAM 256MB
DDR 256MB	DDR 256MB
RDRAM 256MB	RDRAM 256MB

TABLE 33. Keyboards Option Class

Option Item Name	Description
Logitech 967300	Logitech 967300
Gyration GP170	Gyration GP170
Adesso 595	Adesso 595

Now manage the layout of the configurable product as follows:

1. Navigate to the MXWS-7700 model.
2. On the Display tab, set the Number of Columns property to 3. This is equivalent to setting the UI: NUMBER OF COLUMNS property to 3.
3. Navigate to the Monitors option class.
4. On the Display tab, set the Number of Columns property to 3. This is equivalent to setting the UI: NUMBER OF COLUMNS property to 3.
5. Navigate to the Graphics Cards option class.
6. On the Display tab, set the Number of Columns property to 1.
7. Navigate to the Processors option class.
8. On the Display tab, set the Number of Columns property to 1.
9. Navigate to the RAM option class.

10. On the Display tab, set the Number of Columns property to 1.
11. Navigate to the Keyboards option class.
12. On the Display tab, set the Number of Columns property to 1.

When you compile and test this model, and then select a monitor, then the page is laid out as illustrated below.

The screenshot shows a configuration window titled "MXWS-7700" with a status bar indicating "Errors: 0 Warnings: 0 Suggestions: 0". Below the title bar, there's a section for "Price as configured: \$899.00" and "Lead Time: 0.0 day(s)", followed by buttons for "Set Defaults", "Show Trace Log", "Show Messages", "Clear", "Update", "Summary", and "Add to List".

The main content area is divided into four sections:

- Monitors:** Contains three radio button options: "None" (\$0.00), "Optquest G95" (\$0.00), and "Optquest G115" (\$0.00). An "Update" button is located below these options.
- Graphics Cards:** Contains four radio button options: "None" (\$0.00), "GC-1000" (\$0.00), "GC-2000" (\$0.00), and "GC-3000" (\$0.00).
- Processors:** Contains four radio button options: "None" (\$0.00), "Pentium 4 2.8 GHz" (\$0.00), "Pentium 4 2.8A GHz" (\$0.00), and "Pentium 4 2.8C GHz" (\$0.00).
- RAM:** Contains four radio button options: "None" (\$0.00), "SDRAM 256MB" (\$0.00), "DDR 256MB" (\$0.00), and "RDRAM 256MB" (\$0.00).

Below the Graphics Cards section, there is a **Keyboards** section with four radio button options: "None" (\$0.00), "Logitech 967300" (\$0.00), "Gyratron GP170" (\$0.00), and "Adesso 595" (\$0.00).

FIGURE 95. Three-Column Layout

Suppose instead that you want the Graphics Cards option class to be displayed in two rows and one column, and then have the Processors class take up two columns. Then do this:

13. Navigate to the Graphics Cards option class.
14. On the Display tab, set the Number of Rows property to 2. This is equivalent to setting the UI: ROW SPAN property to 2.
15. Navigate to the Processors option class.
16. On the Display tab, set the Number of Columns property to 2.

When you compile and test this model, and then select a monitor, then the page is laid out as illustrated below.

MXWS-7700		Errors: 0 Warnings: 0 Suggestions: 0	
No errors			
Price as configured: \$899.00 Lead Time: 0.0 day(s)		Set Defaults Show Trace Log Show Messages Clear Update Summary Add to List	
<div>Monitors</div> <div> <input checked="" type="radio"/> None \$0.00 <input type="radio"/> Optquest G95 \$0.00 <input type="radio"/> Optquest G115 \$0.00 </div> <div>Update</div>			
<div>Graphics Cards</div> <div> <input checked="" type="radio"/> None \$0.00 <input type="radio"/> GC-1000 \$0.00 <input type="radio"/> GC-2000 \$0.00 <input type="radio"/> GC-3000 \$0.00 </div>		<div>Processors</div> <div> <input checked="" type="radio"/> None \$0.00 <input type="radio"/> Pentium 4 2.8 GHz \$0.00 <input type="radio"/> Pentium 4 2.8A GHz \$0.00 <input type="radio"/> Pentium 4 2.8C GHz \$0.00 </div>	
		<div>RAM</div> <div> <input checked="" type="radio"/> None \$0.00 <input type="radio"/> SDRAM 256MB \$0.00 <input type="radio"/> DDR 256MB \$0.00 <input type="radio"/> RDRAM 256MB \$0.00 </div>	<div>Keyboards</div> <div> <input checked="" type="radio"/> None \$0.00 <input type="radio"/> Logitech 967300 \$0.00 <input type="radio"/> Gyratation GP170 \$0.00 <input type="radio"/> Adesso 595 \$0.00 </div>

FIGURE 96. Revised Three-Column Layout

Finally, add one more option class. This is a user-entered value class called Case with one option item called Color. Set up the option item as a String-valued property that can take a value from this list: Black,Blue,Green,Red,White.

When you compile and test this model you see that the layout is skewed by the Case option class sticking out on the third row. To correct this, you need to specify that the RAM option class must skip a column: this accounts for the fact that the Graphics Cards option class takes up two rows.

17. Navigate to the RAM option class.
18. On the Display tab, set the Number of Columns to Skip property to 1. This is equivalent to setting the UI: SKIP COLUMNS property to 1.

When you compile and test the model, you now see that the rows and columns are again what you expect.

MXWS-7700
Errors: 0 Warnings: 0 Suggestions: 0

No errors

Price as configured: \$899.00 Lead Time: 0.0 day(s)
[Set Defaults](#)
[Show Trace Log](#)
[Show Messages](#)
[Clear](#)
[Update](#)
[Summary](#)
[Add to List](#)

Monitors

☒ None \$0.00
☐ Optquest Q95 \$0.00
☐ Optquest Q115 \$0.00

Update

Graphics Cards

☒ None \$0.00
☐ GC-1000 \$0.00
☐ GC-2000 \$0.00
☐ GC-3000 \$0.00

Processors

☒ None \$0.00
☐ Pentium 4 2.8 GHz \$0.00
☐ Pentium 4 2.8A GHz \$0.00
☐ Pentium 4 2.8C GHz \$0.00

RAM

☒ None \$0.00
☐ SDRAM 256MB \$0.00
☐ DDR 256MB \$0.00
☐ RDRAM 256MB \$0.00

Keyboards

☒ None \$0.00
☐ Logitech 967300 \$0.00
☐ Gyration GP170 \$0.00
☐ Adesso 595 \$0.00

Case
Please enter a color:

FIGURE 97. Revised Three-Column Layout with Skipped Column

The End User Experience

In this lesson, we will bring together the results of all the lessons so far. In this lesson, you will cover

- Direct Commerce End-User Experience

Direct Commerce End-User Experience

In LESSON 4, "Creating Partners, Partner Administrators, and Partner Users", you created two direct commerce partners, CompCom and FirstCommerce. In addition, you created the distributor, Anderel, as a direct commerce partner. The direct commerce partner users log in to the enterprise server and order directly from the enterprise, in this case, Matrix Products. They do not select distributors, so partner users of direct commerce partners cannot make price-and-availability requests or transfer product inquiry lists.

1. Log in as the direct commerce end-user jspencer (password: jspencer) from the partner FirstCommerce.

This displays the end-user home page.

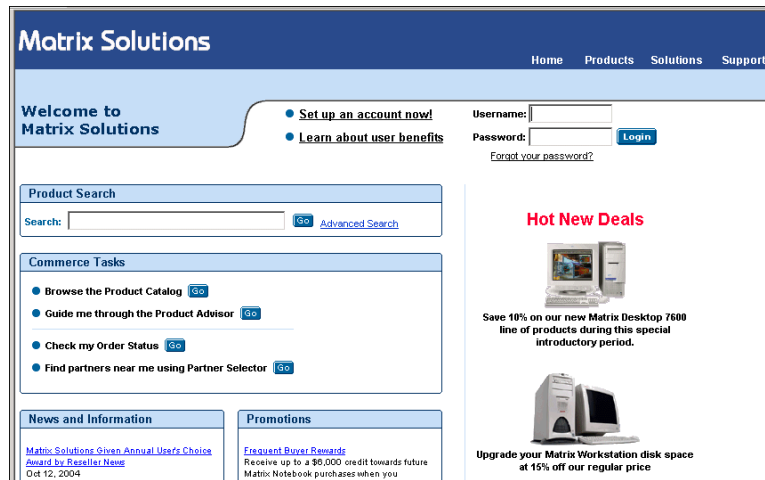


FIGURE 98. Direct End-User Home Page

2. Browse the product catalog.

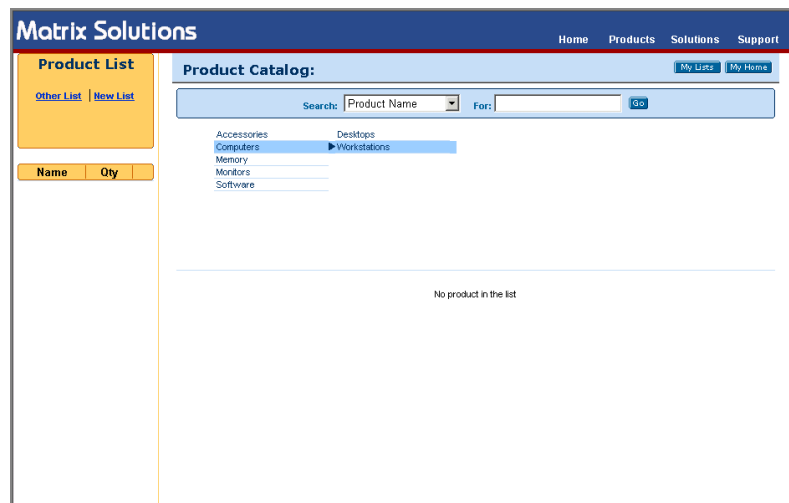


FIGURE 99. Browsing the Product Catalog

3. In the fly-out menu, find and click **Workstations**.

This displays, in the lower part of the frame, the products in this category that are part of the price list assigned to FirstCommerce.

Matrix Solutions Home Products Solutions Support

Product List
Other List New List

Product Catalog: Workstations My List My Home

Search: Product Name For: Go

Accessories Desktops
Computers ► Workstations
Memory Monitors Software

Name Qty

Specify the quantity and click "Add to List" to include the product in your list. The included product will appear in your list in the left side of the screen. You can also select multiple products and click "Compare" to view a side-by-side feature comparison.

Compare

	Product Name	Product ID	Description	Unit Price	Qty	
<input type="checkbox"/>	Matrix 7510 Workstation	MXWS-7510	The Matrix 7510 Workstation comes standard with an Intel Pentium III Processor 866MHz, 128MB RAM, 10GB hard drive, 16X CD-ROM drive, 16MB nVidia TNT2 M64 graphics card, and a 15" Monitor.	\$2,250.00	1	Add to List
<input type="checkbox"/>	Matrix 7530 Workstation	MXWS-7530	The Matrix 7530 Workstation comes standard with an Intel Pentium III Processor 866MHz, 192MB RAM, 20GB hard drive, 16X CD-ROM drive, 16MB nVidia TNT2 M64 graphics card, and a 17" Monitor.	\$2,849.05	1	Add to List

Compare
[Back to Top ↑](#) ☐ Show Product Images

FIGURE 100. Browsing the Product Catalog

Notice the prices. The price for the MXWS-7510 is different from the price in the previous scenario just completed. This is because the partner, FirstCommerce, has been assigned a price list which contains a “conditional” price for this product. You set this “conditional” price when you created the price list in "Modifying the Enterprise Master List" on page 49. The “conditional” price goes to any partner who is partner type “retailer” and partner membership level “platinum”. FirstCommerce meets these criteria so it qualifies for this price.

In the direct commerce scenario, the prices the end-user sees here are the prices the customer pays.

4. Find MXWS-7510.

5. Click **Add to List**.

The product appears in the product inquiry list at left.

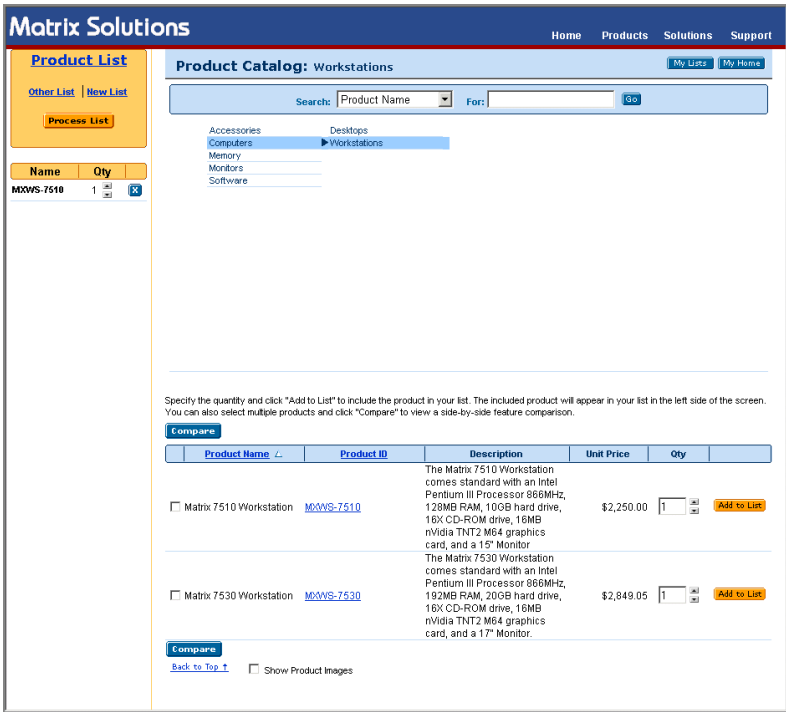


FIGURE 101. Adding a Product to the Product List

6. Click **Process List**.

Matrix Solutions Home Products Solutions Support

Build Product List: My Lists My Home

List Name: **Product List** Customer Type: **General** Currency: **USD**
 Last Modified: **Jun 24, 2002** Items: **1** [Edit](#)

1 **Build Product List** 2 Prepare Order Header 3 Review and Place Order

← BACK NEXT →

You are currently on step 1 of 3 in processing this list.
 Review the list below, add or remove products. Once your list is complete click "Next" to prepare the order header information.

Add Products [Add from Catalog](#) [Help Me Find Products](#) [Enter Product ID's](#)

After changing quantities, click "Update"

[Compare](#) [Move to List](#) [Copy to List](#) [Remove](#) [Update](#) [Save as Quote](#) [Request for Quote](#)

	Name	Product ID	Price	Qty	Ext. Price	Status
<input type="checkbox"/>	Matrix 7510 Workstation	MWVS-7510	\$2,250.00	1 all del	\$2,250.00	

[Back to Top ↑](#) [Route This List](#) [Go](#)

FIGURE 102. Processing the Product List: Direct Commerce

In the out-of-the-box order-placing scenario, the second step is "Prepare Your Order". The end-user is dealing directly with Matrix Products.

7. Click Next.

This displays the order information, ready for preparation.

Matrix Solutions Home Products Solutions Support

Prepare Order Header: My Lists My Home

List Name: **Product List** Customer Type: **General** Currency: **USD**
 Last Modified: **Jun 24, 2002** Items: **1** [Edit](#)

1 Build Product List 2 **Prepare Order Header** 3 Review and Place Order

← PREVIOUS NEXT →

You are currently on Step 2 of 3 in processing this list.
 Click "Edit Header Info" to prepare order header. Click the line number button in the first column in the product list below to specify a different line item shipping information. Click "Next" to review and place order.

P.O.# None Email Address: jspencer@firstcommerce.com

Bill To: 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA	Ship To: 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA	Sold To: 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA	Ship Via: Multiple, see below Ship when complete: No Deliver on:	Memo: Edit Header Info
--	--	--	---	---

[Check Availability](#)

	Product ID	Ship To	Deliver On	Via	Status	Qty	Avail	Amount
1	MWVS-7510					1		\$2,250.00

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Sub Total: \$2,250.00
 Tax: \$135.00
 Shipping Cost: \$112.50
 Total Price: **\$2,497.50**

FIGURE 103. Preparing the Order: Direct Commerce

The addresses shown in the header are derived from one of three places:

-
- The Partner Profile

You will recognize the address in Figure 103 on page 125 as the sold-to address we created for FirstCommerce in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users".

- The User Profile

If the user (in this case, jspencer) has specific ship-to, bill-to, and/or sold-to addresses defined in their user account, then the header will use these addresses before the partner profile addresses. However, we entered no such information for jspencer when we created her user account in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users".

- The Order Header

You can click **Edit Header Info** to modify the addresses to be used for the order.

You can also click the triangle to the left of each line item to enter individual shipping information for each line item.

8. Click **Edit Header Info**.

This window (Figure 104 on page 127) enables you to enter the payment information. You can also modify the ship-to, bill-to, and sold-to addresses and enter shipping details such as shipping method, delivery date, and shipping instructions.

Matrix Solutions Home Products Solutions Support

Order Header Info: Save Cancel

All fields with asterisk(*) are required.

P.O.#:

Payment Type: * Credit card

Account Number or Credit Card Number: * 204545983987

Expiration Date: * June 2004

Credit Card Holder (if selected Credit Card): * Jane Spencer

Credit Card Type (if selected Credit Card): Visa

Phone Number:

Email Address: jspencer@firstcommerce

Taxable: ☒

Ship To Address Address Book

Title: Mr.

Last name:

First name:

Company Name:

Address Line 1: * 234 Advent Drive

Address Line 2: Suite 405

City: * Palo Alto

State and Zip: CA 94304

Country: * USA

Bill To Address Address Book

Title: Mr.

Last name:

First name:

Company Name:

Address Line 1: * 234 Advent Drive

Address Line 2: Suite 405

City: * Palo Alto

State and Zip: CA 94304

Country: * USA

Sold To Address Address Book

Title: Mr.

Last name:

First name:

Company Name:

Address Line 1: * 234 Advent Drive

Address Line 2: Suite 405

City: * Palo Alto

State and Zip: CA 94304

Shipping Details

Ship Via: * UPS

☒ Ship When Complete

Shipping Instructions: (Max 240 Characters) Leave at front desk

Deliver On: 7/26/02

Save Cancel

FIGURE 104. Order Header Information

9. Click **Save**.

This re-displays the Prepare Order Header page.

10. Click **Next**.

This displays the order in its last stage, before you finally place the order.

Matrix Solutions

[Home](#)
[Products](#)
[Solutions](#)
[Support](#)

Review and Place Order:

List Name: **Product List**

Customer Type: **General**

Currency: **USD**

Last Modified: **Jun 24, 2002**

Items: **1**

[Edit](#)

1 Build Product List

2 Prepare Order Header

3 Review and Place Order

PREVIOUS

PLACE ORDER

You are currently on step 3 of 3 in processing this list.

Review the order and click "Place Order" to place this order

P.O.#: None		Email Address: jspencer@firstcommerce.com	
Bill To: 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA	Ship To: 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA	Sold To: 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA	Ship Via: UPS Ship when complete: Yes Deliver on: Jul 26, 2002 Memo: Leave at front desk

	Product ID	Ship To	Deliver On	Via	Status	Ordered Qty	Amount
1	MXWS-7510				Open	1	
							Sub Total: \$2,250.00
							Tax: \$135.00
							Shipping Cost: \$112.50
							Total Price: \$2,497.50

FIGURE 105. Order Ready for Placing

11. Click **Place Order**.

This displays the placed order (Figure 106 on page 128).

Matrix Solutions

[Home](#)
[Products](#)
[Solutions](#)
[Support](#)

Confirmation of Order #8588591438

Your order was successfully placed and a confirmation email has been sent to your email address. You may want to print a copy of this page for your records.

Click "Done" to return to your updated list of orders. [Done](#)

Order #: 8588591438 Order placed on: 6/24/2002 Submitted On: 6/24/2002 Total amount: \$2,497.50
--

P.O.#: None		Email Address: jspencer@firstcommerce.com	
Bill To: 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA	Ship To: 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA	Sold To: 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA	Ship Via: UPS Ship when complete: Yes Deliver on: Jul 26, 2002 Shipping Instructions: Leave at front desk

	Product ID	Product Name	Ship To	Via	Qty	Amount
1.	MXWS-7510	Matrix 7510 Workstation			1	\$2,250.00
						Sub Total: \$2,250.00
						Tax: \$135.00
						Shipping Cost: \$112.50
						Total Price: \$2,497.50

FIGURE 106. Placed Order

The order is placed. Notice the order number at the top of the page.

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