Comergent eBusiness System

Release 7.2

Overview Guide

Sterling Commerce
An IBM Company

Comergent eBusiness System Overview Guide

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Preface

This *Overview Guide* and the associated documentation provide the information required for you to use the Comergent eBusiness System at your site.

This guide introduces you to the Comergent eBusiness System by presenting an overview of the product and its various component applications.

Audience

This guide is written for all users of the Comergent eBusiness System. However, its primary audience is an enterprise user who will use the Comergent eBusiness System but is unfamiliar with any of its applications. We use the term "you" when referring to enterprise personnel. The purpose of this guide is to help you to become familiar with Comergent eBusiness System terminology and understand how the various applications work together to provide customers with their e-commerce experience.

Each Comergent application is described in a separate section. We present an overview of the application and include the tasks that administrators can perform with each application. The primary purpose of each section is to help administrators who will be using that application gain a basic understanding of its use. Refer to the *Comergent eBusiness System Administration Guide* for detailed information about application usage.

This guide assumes a basic familiarity with network, database, and commerce concepts.

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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support@comergent.com
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CHAPTER 1   *Introduction*

This guide provides an introduction to the Comergent eBusiness System. It covers:

- This chapter, CHAPTER 1, "Introduction", provides a basic description of the Comergent eBusiness System.

- CHAPTER 2, "End-User Experience", describes the e-commerce experience from the end-user's perspective.

- CHAPTER 3, "Managing the End-User Experience" describes how you use the different Comergent applications to create and support this e-commerce experience.

- CHAPTER 4, "Partners and the Comergent eBusiness System" presents an overview of the role of your partners in the Comergent eBusiness System.

- CHAPTER 5 through CHAPTER 10, "New Features in Release 7.1" cover changes in the Comergent eBusiness System in previous releases.

- CHAPTER 11, "New Features in Release 7.2", describes the new functionality in this release.

Comergent eBusiness System Software

The Comergent eBusiness System is a comprehensive suite of enterprise applications that enable organizations to engage in sell-side B2B

(business-to-business), B2C (business to consumer), B2B2C (business to business to consumer) and B2Everyone e-commerce and sell products and services to customers through any channel.

The Comergent eBusiness System is built on a unified architecture platform and conforms to the Java 2 Enterprise Edition (J2EE) standard published by Sun Microsystems, Inc.It is written using standard Java technologies: JavaServer Pages (JSPs) and servlets (modules of Java code that run in a servlet container to answer client requests). By using JSP technology, the user interface is separated from content generation, enabling designers to change the overall page layout without altering the underlying dynamic content.

Each JSP page comprises a mixture of standard HTML content, JSP tags, and scriptlets that are processed dynamically as the page content is generated. By modifying these JSP pages and creating your own scriptlets, you can customize the Comergent eBusiness System to reflect your company's style.

For more information about customization, refer to the *Comergent eBusiness System Developer Guide*. For more information about the technical architecture of the Comergent eBusiness System, refer to the *Comergent eBusiness System Implementation Guide*.

Comergent Applications

The Comergent eBusiness System is designed and built for the Internet using leading Internet standards. The software is written in Java and uses XML-based structured documents for data representation, transformation, and messaging. The Comergent applications that comprise the Comergent eBusiness System are platform-independent and run on UNIX and Windows NT environments.

Each application is designed to take full advantage of the underlying distributed Comergent platform and integrates seamlessly with other Comergent applications. This integration enables Comergent applications to share information easily, where necessary to provide the most value to an enterprise's customers without the enterprise having to write costly and time-consuming code.

Modularity

The Comergent eBusiness System is developed as a set of interdependent modules that conform to a common organizational structure. In general, each module corresponds to a functional component of the Comergent eBusiness System such as an application or a component of the Comergent eBusiness System platform. Some modules may support both a Java API and a user interface whereas others may just

support a Java API provided to other modules. Some modules provide a set of "helper" classes, JSP pages, and other files such as Javascript files and images which are used by a number of other modules.

Each module is designed to be packaged and delivered as an archive (a single file created by using the jar application of the JDK) called a CMI (Comergent Module Image) file.

For more information about modularity, refer to the *Comergent eBusiness System Developer Guide*.

Enterprise Server

Any server that has installed the Comergent eBusiness System is an enterprise server. However, depending on your company's customizations and the Comergent applications you purchased, each enterprise installation is different. Together, your company (with its enterprise installation) and your partners form an e-commerce network as shown in Figure 1 on page 3.
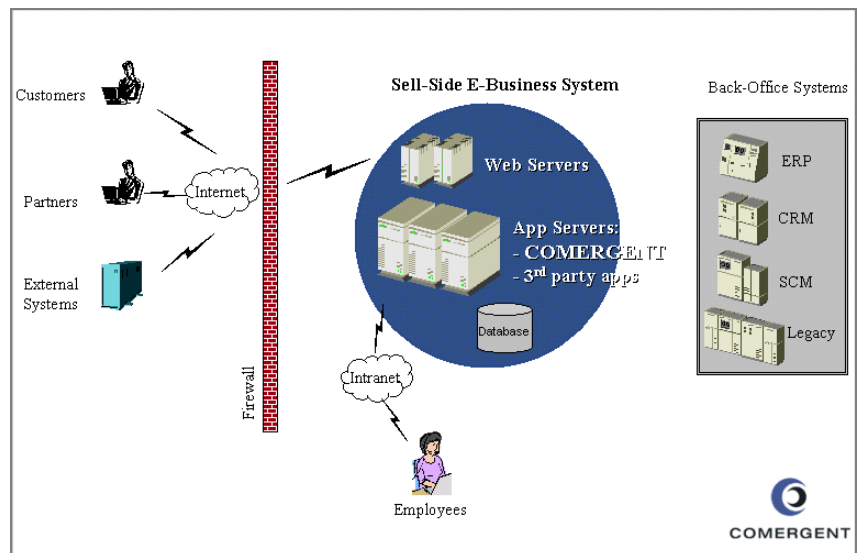
FIGURE 1.   E-Commerce Network

Implementation of an Enterprise Server

The implementation of an enterprise server involves:

- installing it at your enterprise e-commerce site

- configuring the Comergent eBusiness System for your site

- integrating the enterprise server with your existing e-commerce systems

- populating the Knowledgebase with all the information required.

At the enterprise site, integrating the Comergent eBusiness System typically involves integration with one or more of the following:

- enterprise product catalog

- product configurator

- e-commerce system

- legacy partner information systems

For additional information about implementing your enterprise server, refer to the *Comergent eBusiness System Implementation Guide*.

Integration with ERP Systems

The Comergent eBusiness System provides integration with ERP systems either directly, through the *C3* Integrator, or indirectly, by using the database server as a staging area.

As of Release 7.0, the *C3* Integrator uses a combination of XML-based messaging and HTTP to integrate the Comergent eBusiness System with an ERP system. This replaces the use of SeeBeyond's e*Gate server for integrating the Comergent eBusiness System with an ERP system.

When a Comergent eBusiness System user performs an action requiring that information be passed to the ERP system, the Comergent eBusiness System generates an XML message that is posted to the HTTP server. The server manages the interaction with the ERP system and returns information to the Comergent eBusiness System.

Conversely, if a change is made in the ERP system to a Comergent eBusiness System entity (such as a customer order), then the change can be posted back to the Comergent eBusiness System so that it is visible to users.

The *C3* Integrator supports the ability of the Comergent eBusiness System to place orders into an SAP ERP system and to receive change or cancel order information from the SAP ERP system. Partner and product information can also be imported from the SAP ERP system, and this information can be updated as information in the SAP system is modified.

In integrating an enterprise server, it is also possible to use a database server as a staging area for the ERP system data. This enables the Comergent eBusiness System to access data from the database server rather than from the ERP system directly. Conversely, the Comergent eBusiness System can stage data in the database server which can be accessed by the ERP system in batch mode.

This integration with back-end ERP systems (through a database server) can be in real time or updated automatically or manually through a batch process. For more information about integrating with ERP systems, see "Integrating with Back-end Applications" on page 44 and the *Comergent eBusiness System Implementation Guide*.

Customizing Your Enterprise Server

You can customize the Comergent eBusiness System for your company. Custom criteria include:

- Customize the customer-facing Web pages to match the look and feel of your company.

- Integrate with existing back-end enterprise resource planning (ERP) and order management systems.

- Map existing product, partner, and pricing data with the appropriate Comergent applications.

- Customize the Comergent eBusiness System administration pages to match your company's business requirements.

- Integrate your e-commerce Web site with your partners' e-commerce Web sites.

Using the Comergent eBusiness System

The Comergent eBusiness System software comprises multiple applications.

- **C3** Advisor™

  The **C3** Advisor™ application guides customers to the right products for their business needs through a questionnaire you design. See "C3 Advisor" on page 32.

- **C3** Analyzer™

  The **C3** Analyzer™ reporting application provides enterprises with insight into the commerce activities of customers and partners. See "C3 Analyzer" on page 39.

- **C3** Commerce Manager™

  C3 Commerce Manager™ is the foundation upon which the other applications in the Comergent eBusiness System operate. This application provides core system services such as security, back-office integration, integration with external e-commerce procurement systems and net marketplaces, and messaging. See "Configuration and Integration" on page 43.

- **C3** Configurator™

  The **C3** Configurator™ application enables you to create models representing configurable products. These models consist of available options. Your customers can select from these options to customize the products to their specific needs. See "C3 Configurator and Visual Modeler" on page 33.

- **C3** Integrator™

  The **C3** Integrator™ enterprise application integration (EAI) application enables the flow of business data between the Comergent eBusiness System and enterprise resource planning (ERP) systems. See "Integrating with Back-end Applications" on page 44.

- **C3** Promotions™

  The **C3** Promotions™ application enables you to create custom promotions for different customers. This application uses product data to link personalized marketing messages and promotions to a specific product. These marketing messages enable distributors to effectively up-sell, cross-sell, and inform customers of their value-added services. See "Displaying Promotions with C3 Promotions" on page 36

- *C3* Orders™

  The *C3* Orders™ application accepts orders and passes them on to order management systems. Your customer can check order status and modify orders. Your customer service representative can also check order status and modify orders. See "C3 Orders" on page 40.

- *C3* Partner.com™

  The *C3* Partner.com™ application enables your company to "host" your partners' e-commerce Web sites on your servers or on application service providers (ASP) servers. See "C3 Partner.com" on page 51.

- *C3* Pricing™

  The *C3* Pricing™ application maintains pricing information and enables you to provide custom pricing for different customers. Customers can only buy products that are on active price lists that are assigned to their company (through the partner profile). This enables you to tailor your product offerings based on factors including geographic market or customer type (for example, OEM or consumer). See "Maintaining and Customizing Price Lists" on page 35.

- *C3* Product Manager™

  The *C3* Product Manager™ application maintains your product catalog and provides product information to Comergent applications. See "C3 Product Manager" on page 29.

- *C3* Profile Manager™

  The *C3* Profile Manager™ application creates and maintains profiles for your enterprise partners and customers. Each partner created in *C3* Profile Manager is linked to price list(s) created in *C3* Pricing. This linkage enables customers to view customized pricing when selecting, comparing, and purchasing products. See "Managing Partners, Customers, and Users" on page 25.

- *C3* Quotes™

  The *C3* Quotes™ application provides your customer with a personalized workspace to build and manage product inquiries, quotes, and requests for quotes (RFQs). It also enables your customer service representative to approve or reject quotes and RFQs, as well as modify quotes and RFQs as necessary. See "C3 Quotes" on page 27.

- **C3** Returns™

  The **C3** Returns™ application enables you to automate your return process using the Internet. It integrates with both order management and ERP systems. Your customer service department can use this application to view and modify returns as necessary. See "C3 Returns" on page 41.

End-User Experience

The Comergent eBusiness System enables sales directly to end users as well as through your partners. Through the enterprise e-commerce Web site, users can shop, check price and availability, view promotions, view related products, make wish lists, and submit completed orders to the enterprise or to storefronts associated with the enterprise. Both the enterprise and its partners can participate in the selling process.

This chapter describes scenarios in which the Comergent eBusiness System is used to support an end-user's online purchasing experience.

Purchasing Experience

End-users purchase items by placing them into a cart and placing the cart as an order. End-users can place multiple items in a cart and items can be added and removed before placing the order. End-users can have multiple carts, enabling them to create templates for orders that they place regularly, wish lists, and orders at different distributors and suppliers. They can save carts as quotes, and use carts to negotiate prices. End-users can select partners based on pricing, product availability, or geography (for example, the location of a shipping facility).

The Comergent eBusiness System enables you to provide e-commerce to your end-users by facilitating the following:

- Personal workspaces for end-users

  Partner users and registered users have a workspace that includes their cart(s), personal address books that include shipping and billing information, status of orders in progress, status of returned items, and so on.

  If your enterprise has storefronts associated with it, end-users associated with a particular storefront partner can only request product and availability information from that partner.

- Anonymous user, partner user, registered user, and storefront user support

  Enterprises support e-commerce with anonymous, partner, registered, and storefront users. When an anonymous user attempts to place an order, the Comergent eBusiness System prompts the user to register.

- Guided selling

  The *C3* Advisor application enables your end-users to look for products by navigating through your product catalog. In addition, it provides a search feature and guides users to products that meet their needs by finding products that match an end user's answers to questions that you prepare.

- Pricing and products geared for specific end-users

  With *C3* Pricing, you can create multiple price lists. With *C3* Profile Manager, you assign price lists to partners and storefronts that contain the products and prices relevant for them. If partner users should not purchase a particular product line, then *do not* assign price lists with the product line to that partner. That is, partner users can only see and buy products that are included in price lists assigned to their partner. For more information, see "Maintaining and Customizing Price Lists" on page 35.

- Quotes and order management

  With the Comergent eBusiness System, end-users can obtain product information, select products, get prices, configure products, and place an order.

  End-users can also modify quantities and prices in a particular cart, then submit the cart as a request to negotiate prices. Your customer service representative can then review the cart and either reject it, accept it as is, or modify quantity and price and accept the modified cart. Once the modified cart has been accepted, it is converted to a quote. End-users can either remove the quote or convert the quote to an order.

- Commerce analysis

  With *C3* Analyzer, you can generate reports displaying customer demand data, enabling you to respond quickly to market conditions, track responses to events and programs, and capture "lost sales" opportunities for analysis.

Conducting e-Commerce

An end-user buying products from your enterprise Web site may be registered or anonymous (unregistered). Registered users may be storefront users or partner users.

Registered, storefront, and partner users enter their username and password and log into the enterprise Web site. They may maintain multiple active carts and can review the status of any of their orders.

Anonymous users browse the enterprise Web site and retrieve product and price information. If they decide to create a cart and place an order, the system prompts them for the required information (including a username and password) and registers them. Once this process occurs, the anonymous user becomes a registered user.

The following diagram illustrates how the end-user conducts e-commerce on your enterprise Web site.
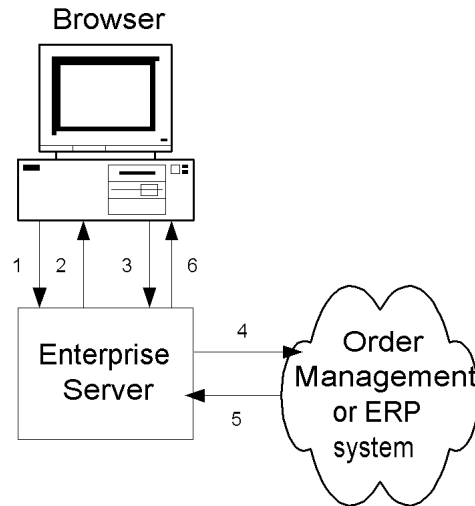
FIGURE 2. Flow of Information for a Typical e-Commerce Request

The following steps describe the flow of information for e-commerce requests:

1. An end-user points their browser to the enterprise site, creates a cart, and begins selecting products.

2. The user obtains price and availability information from the enterprise server and configures any applicable products.

   If the user is not associated with a partner, they receive pricing for registered or anonymous users.

3. Partner users can modify the prices and request a quote. In this case, customer service representatives either approve the request, approve the request with modifications, or reject the request.

   Once the end-user is satisfied with the products (and their configurations) in the cart, the end-user submits an order.

   If the end-user is anonymous, then the end-user provides the information necessary for registration. If the end-user is already registered, then the end-user has the choice of updating any information, including shipping and billing addresses.

4. The enterprise server passes the order to the back end order management or other order fulfillment system.

5. The order management system acknowledges the order and passes a confirmation message to the enterprise server.

6. The enterprise server displays a confirmation message indicating whether the order is successful.

e-Commerce Using Comergent Applications

The *C3* Commerce Manager supports the entire e-commerce process. This application provides the core system services that the other Comergent applications use. Each step includes the additional Comergent applications that support that step.

1. The end-user logs into your e-commerce Web site.

   If the end-user is registered, then the Comergent eBusiness System provides the authentication information. The *C3* Quotes application provides the end-user with a workplace.

2. The end-user selects products and, if necessary, configures them.

   The *C3* Quotes application keeps track of the end-user's products in a product inquiry list. The *C3* Advisor application guides the end-user to products that best meets his business needs. The *C3* Product Manager application provides the product information. The *C3* Pricing application, working with the *C3* Profile Manager, provides pricing information. The end-user uses the *C3* Configurator application to configure the product.

3. The end-user can view promotions.

   The *C3* Promotions application serves up the promotions.

4. The end-user can submit a request to negotiate prices.

   Before placing the order, a end-user can modify the quantities and prices in a particular cart and submit the cart as a request to negotiate prices. The customer service representative can approve or reject the request. In the process of approval, as necessary, the customer service representative can modify quantities and prices.

5. The end-user places an order.

   Approvals may be required. The enterprise administrator or the partner administrator can set spending limits for end-users, as well as designate partner users who can approve orders above the spending limit.

   Once the approvals are obtained (if necessary), *C3* Orders application passes the order information to the back-end enterprise resource planning (ERP) or order management application. If the *C3* Integrator application is implemented, then *C3* Integrator performs this function.

6. The end-user may return items in an order.

   The *C3* Returns application takes the end-user's return request and approves, rejects, or determines the request is pending and will be processed manually by a customer service representative. If the return request is approved, then the *C3* Returns application passes the return request to the back-end (or other order fulfillment) system. This system provides return shipping instructions to the *C3* Returns application that in turn, sends this information in an email to the end-user.

Guided Selling

End-users can choose products by answering questions you created with the *C3* Advisor application. They see questionnaire pages with one or more questions. Each question has several possible answers. Questionnaire pages may also display a list of products. The products match the end-user's preferences as determined by their previous answers, as shown in the following figure.

FIGURE 3. Sample Questionnaire Page

Each questionnaire page displays up to three panels: a Question Panel, a Product Panel, and a Cart. The Question Panel shows questions and answers, while the Product Panel shows a list of the products that meet the requirements of the search to that point. (You can use *C3* Advisor Administration to determine whether to display a product list on a questionnaire page. See the *Comergent eBusiness System Administration Guide* for more information.) The Cart panel displays the number of products that you have selected by clicking **Add to Cart**.

Each questionnaire page follows this general pattern. The number of questions may vary from page to page, and the number of products that are displayed in the Product Panel also changes. These changes occur when your end-users choose one or more answers and click **Next** or **Show Me Products**. When they do so, the *C3* Advisor:

• Filters the list of products that meet their criteria.

   The list of products shows only those products that have all of the desired features.

- Displays a list of products without changing the questionnaire page (**Show Me Products** only).

  Based on the questions answered so far, the *C3* Advisor application returns a list of products that matches the end-user's preferences without leaving the questionnaire page. If the end-user is not satisfied by the list of matching products, they can change their answers and get a new list of matching products.

- Determines which questionnaire page will be displayed next (**Next** only).

  In most cases one questionnaire page can lead to several different questionnaire pages. The next questionnaire page that is displayed depends upon the answers your end-users choose.

Depending on the answers your end-users have chosen, the *C3* Advisor application may also:

- Specify that some answers on the next questionnaire page are preselected.

  Questions often are displayed on more than one questionnaire page. In some cases, a questionnaire page that includes a specific question may lead to another questionnaire page that includes the same question. When your end-user encounters this situation, the answer they chose on the previous questionnaire page is selected by default on the second questionnaire page.

  Answers to other questions may be inferred from an end-user's answers to previous questions.

- Specify that some answers on the next questionnaire page are disabled.

  Answers your end-users select on one questionnaire page can make one or more questions on a subsequent questionnaire page irrelevant. For example, if the first questionnaire page offers your end-users a choice of computers such as desktops, workstations, and notebooks, the next questionnaire page might have one question that asks your end-user to choose a monitor size and another question that asks whether or not they want a docking station.

  If your end-user chooses a notebook, the monitor size becomes less relevant. On the other hand, if your end-user chooses a desktop, they have no need of a docking station. Thus, if your end-user chooses a desktop, the answers to a question about a docking station are disabled on the next questionnaire page.

When end-users start the Product Advisor, they are presented with the first questionnaire page in what may be a sequence of Web pages. This may be the default start page or specific questionnaire page based on a questionnaire state

passed to the *C3* Advisor application. See "C3 Advisor" on page 32 and the *Comergent eBusiness System Implementation Guide* for more information.

Depending on the responses that the end-user gives on this first page, the *C3* Advisor generates the next page with its set of questions. As the end-user progresses through the series of questionnaire pages, the *C3* Advisor stores the end-user's answers and determines the next questionnaire page that should be displayed. At each stage in the process, the *C3* Advisor displays the products that match the requirements (if the Show Product List check box is checked in *C3* Advisor Administration).

Browsing the Product Catalog

End-users can browse the product catalog and find products by navigating through a product hierarchy. Products are arranged from the top level general product catalog down to specific categories and products. Each category consists of subcategories, products, or both. By moving the mouse over the product catalog, end-users can view the different product categories. The end-user clicks on a desired product category, and the Web page is updated and displays the products belonging to that product category.
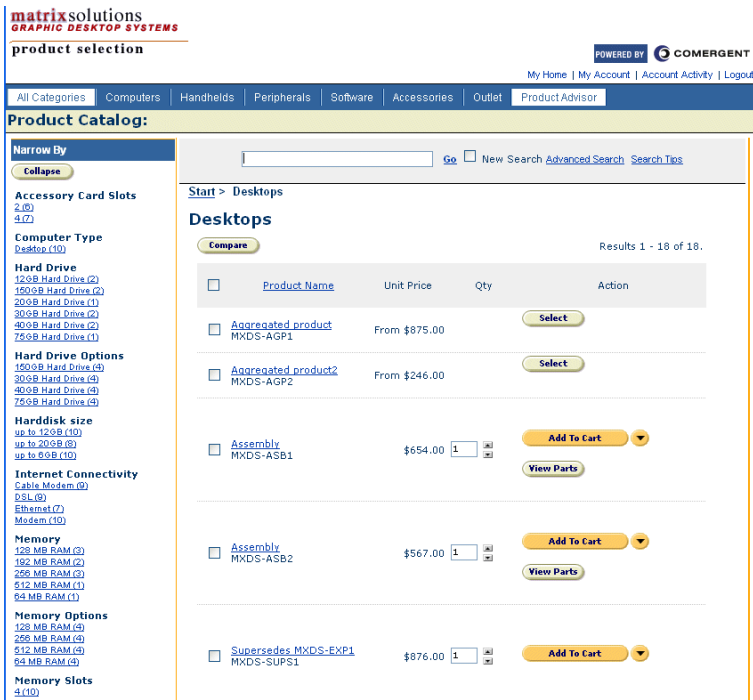
FIGURE 4. Product Catalog

End-users can also search for a product by entering a search term in the Catalog Search field. They can narrow their search results by using Advanced Search. Advance Search provides searching by one or more criteria, including product name, product ID, description, feature, datasheet, and price range.

FIGURE 5. Searching for a Product

End-users may select and add one or more products to their cart or select multiple products for comparison. Before you place an order, if any of the products in a cart becomes obsolete or has been superseded, the end-user cannot check for price and availability or prepare the order until the obsolete product is removed or is replaced by the superseding product.

Entering Products

End-users who frequently order the same products can create carts containing the product IDs and desired quantities, then save the carts to re-use for future orders. This enables them to place orders rapidly without navigating through the entire product catalog.

If the product ID is for an assembly, then all the product ID numbers included within the assembly are displayed as sub-items when an end-user adds this product ID to their cart.

By using the supersession feature of the *C3* Product Manager, you can ensure that superseding product IDs automatically replace obsolete product IDs. For example, if the end-user enters a product ID for an obsolete product, the product displays with a link to the product which supersedes it. For more information on supersession, see "C3 Product Manager" on page 29.

Using a Cart

At any point in creating a cart, end-users can do several things:

- Add one or more of the displayed products to their cart.

    End-users determine the desired quantity of an item then click **Add to Cart**.

- Compare two or more of the products.

    If end-users wish to compare two or more products from the list, they select the products to compare and click **Compare**. A new browser page displays the products arranged in a table that enables direct comparison of the products' features.

In addition, the end-user may be able to:

- Configure a product.

    If you offer products that can be configured, you can enable your end-users to configure these products themselves. This option is only available for configurable products, and requires a configuration application such as the *C3* Configurator application.

- View any resources assigned to a product.

    If you assign resources to products, you make it possible for end-users to see these resources, either through a link, or on the generated page itself. Your Comergent eBusiness System implementor or developer can edit the JSP templates to display these resources.

    For example, you can create a product image resource, and display the image (or a link to the image) with the product.

- View details about a product.

    By clicking on the product ID, end-users view detailed information about the product features.

- View promotions.

  By clicking on a promotion icon, end-users view the promotion for the selected product.

Once end-users are satisfied with the products in their cart, they can place an order.

Quotes and Requests to Negotiate Prices

Users can create carts and place orders based on the carts. In addition, users can also save these carts as quotes with a fixed price in a specified time frame before they place the orders. They can also submit a cart as a request to negotiate prices.

Before the end-user places the order, the end-user can request a quote. They can view the suggested price and enter their own requested price. Once submitted, customer service representatives can approve or reject the request. During the approval process, they can modify the quantity and price as desired.

If the request to negotiate prices is approved, the end-user can save the cart or convert the cart to an order.

The customer service representative can modify the prices and quantities for any line item in a cart at any time.

Placing an Order

Once users place their order, they can choose to use their default shipping, billing, sold-to addresses, and payment information or change this information for the order. In addition, each line item in an order has an individual status, and can have a separate shipping method, shipping address, or delivery date.

Checking Order Status

Once an end-user places an order, the end-user can check the status of the order at any time.

1. The end-user logs into your e-commerce Web site.
2. The end-user enters the appropriate order number and searches for the order.

3. The end-user views and makes changes to the order.

Note:	An end-user can make changes to a line item in an order when the status of the line item is In Process. Once the line item begins to ship (the status of the line item changes to Partial Shipped or Shipped), no changes are allowed.

4. The *C3* Orders application verifies the end-user's changes.

   If the end-user makes any changes that are unacceptable, then the *C3* Orders application returns an error notification to the end-user. Otherwise, it returns a confirmation message and passes on all the accepted changes to the order management system.

Creating a Return

End-users can return part of an order, or all the line items in an order.

1. The end-user logs into your e-commerce Web site and enters the appropriate order number or finds the order using the search feature.

2. The end-user clicks the order.

   The line items, their status, and the requested quantities of each line item in the order are displayed.

3. The end-user clicks **Request Return**.

   The line items that may be returned and the line items that have already been returned in this order are displayed. The end-user may only return line items that are partially or completely shipped.

4. The end-user selects the line item(s) for the return and selects a reason for the return and the return criteria for each line item.

   If any of the line items in the order have serial numbers, then the end-user compares the serial numbers against the line items received. If any differ, then the end-user enters the correct serial numbers.

5. The end-user initiates the return request.

   The *C3* Returns application checks the return request against your company's return policies and returns a message indicating the request is accepted, denied, or is pending and will be processed by a end-user service representative.

6. The *C3* Returns application sends an email to the end-user with the status. Alternately, the end-user can navigate to the Returns page and check on the status of the return request.

7. If the return request is pending, then the customer service representative either accepts or rejects the return.

8. If the return request is accepted, then the *C3* Returns application sends a request to the back-end order management or ERP system requesting a return material authorization (RMA) number.

9. The order management system or ERP system responds with a RMA number and the mailing instructions.

10. The *C3* Returns application sends this information to the end-user in an email.

11. The end-user receives the shipping information and sends the product back to your company.

Managing the End-User Experience

The previous chapter described how the end-user experiences the Comergent eBusiness System. This chapter describes how administrators use the Comergent eBusiness System to manage that experience.

Managing Partners, Customers, and Users

C3 Profile Manager enables you to create and maintain a profile for each of your partners. The partner profile includes such information as organization type, level (such as gold, silver, or platinum), and billing and shipping addresses. In Release 7.1, storefront administrators can also create and maintain profiles for their own partners. For more information, see "C3 Partner.com" on page 51.

In Release 7.1, you can create a hierarchy in situations where an organization is divided into complex structures, or when a storefront itself has storefronts associated with it. For example, an organization may comprise management companies, divisions, locations, and departments. A partner could even have more complicated structures such as franchises and retail outlet chains. A storefront could have distributors, suppliers, and end-users. In Release 7.1, you can mirror these complex structures by creating not simply a partner but a hierarchy belonging to a partner.

Using *C3* Profile Manager, you create an administrator for each partner. Each partner administrator creates partner users and assigns functions to each one. The

partner users can then log in and conduct e-commerce activities as described in the previous two chapters. You can also create storefronts for your partners, then create at least one storefront administrator who can perform nearly all the same functions that you perform as administrator of your enterprise: managing their own business rules, creating price lists, administering system properties, and even creating storefront partners for their storefront.

In addition to these functions, you can use *C3* Profile Manager for the following tasks:

• Create and maintain enterprise users

These are the users who can log in to the enterprise home page and administer some or all modules of the Comergent eBusiness System.

• Associate partners with one or more price lists

Once you create the price lists (see "Maintaining and Customizing Price Lists" on page 35), you use *C3* Profile Manager to associate these price lists with the right partners.

Note:	You can set a business rule so that price lists are used for entitlement only. This means that price lists assigned to partners define only the products the partners are entitled to purchase, not the prices for those products. Prices are obtained from an external source rather than the price lists. See the *Comergent eBusiness System Implementation Guide* for information about configuring the Comergent eBusiness System to get prices from an external source.

• Export partner information in a spreadsheet application

• Review partner activity using the information provided by the partner.

See "Monitoring and Analyzing the Comergent eBusiness System" on page 38 for details on how you use *C3* Profile Manager for this activity.

Storefront administrators can perform these functions only for their storefront.

Refer to the *Comergent eBusiness System Administration Guide* for more detailed information about creating and maintaining partners, storefronts, customers, and users.

Managing the Purchasing Experience

Once anonymous users, registered users, or partner users log into the enterprise site, two products manage the experience: *C3* Quotes and *C3* Portal.

C3 **Quotes**

The *C3* Quotes application enables you to create, access, and quickly share information securely within and across companies. Your end-user has a personalized business workspace to manage e-commerce activities including managing carts and price and availability requests.

The Comergent eBusiness System enables you to communicate with your partner's Web sites. If some of your partners are unable to maintain a separate e-commerce Web site, you can create a storefront for them. You or one of Comergent's application service providers (ASP) can host their Web site. For more information about hosting, see "C3 Partner.com" on page 51.

Integration

The *C3* Quotes application promotes collaborative commerce, enabling you and your partners to sell your products. By integrating with back end order management systems, the *C3* Quotes application enables you to provide your end-users with order fulfillment, order status, and administrative order processing.

During their purchasing experience, end-users may need to configure a product in which they are interested. The *C3* Quotes application integrates with *C3* Configurator to customize the product. If end-users need help in selecting their products, the *C3* Quotes application integrates with *C3* Advisor to provide the end-users with a guided selling experience.

Purchasing Experience

The *C3* Quotes application:

- Accommodates both novice and experienced end-users.
- Provides custom pricing to your end-users with the *C3* Pricing application.
- Supports registered and anonymous users in direct commerce.
- Supports punchout protocols.

End-users use *C3* Quotes to accomplish the following tasks:

- Manage their cart(s) and orders in their own personalized workspace.

  All registered and partner users have personal workspaces where they may keep one or more carts, check on orders, update shipping and billing information, and initiate returns.

  Although anonymous (unregistered) users do not have their own personalized workspace until they register, the Comergent eBusiness System tracks their choices during the session to giving them the same unique experience as other users.

- View enterprise and partner promotions on products.

  The end-user sees the partner promotions when a price and availability request is sent to that partner.

- Create copies of carts.

- Move line items from one cart to another prior to ordering (based on pricing, availability or shipping needs).

  This enables an end-user to create multiple orders that can be fulfilled by different partners, shipped to different locations, approved by different people, and so on.

- Route carts to different users for approval or request modification.

- Maintain their own user profile, including contact, shipping, and billing information.

- Place an order directly with an enterprise, partner, or storefront partner.

- Select partner(s) based on business or geographic attributes.

- Obtain multiple price and availability requests from different partners.

- Submit requests to negotiate prices and enable customer service representatives to manage these requests and convert them to quotes.

Refer to the *Comergent eBusiness System Administration Guide* for step-by-step instructions.

C3 Portal

C3 Portal provides a means for you to provide standard portal functionality as part of your implementation of the Comergent eBusiness System. It enables you to provide information in the form of portlets to users using the standard portal content types such as HTML and rich site summary (RSS). These portlets can be deployed into any portlet container that supports the JSR-168 portlet specification.

You can personalize the user experience by modifying the layout of portal pages and by selecting the content to display in each portlet. For more information about the portal framework, refer to the *Comergent eBusiness System Developer Guide*.

Widgets

Widgets are self-contained, custom tags that can be used in JSP pages to provide a user interface component in a generated Web page. Since widgets are self-contained and their content is generated independently of the rest of the Web page, they can be removed or relocated from one page to another without affecting the look and feel of your e-commerce site.

When users log in to the e-commerce Web site, they see several panels containing several types of information. For example, users assigned the Commerce function see an Orders panel containing information about orders placed and their status. The Carts panel displays information about the user's carts; the Returns panel displays information about any orders the user is returning, and so on. Other panels may list invoices, contracts, team tasks, special offers, and quotes. Widgets generate the contents of these panels.

Creating Your Own Widgets

You may create custom widgets containing information you wish to convey to your end-users. For more information about the generic widget framework, refer to the *Comergent eBusiness System Developer Guide*.

Maintaining the Product Catalog

Once the end-user has logged in, the end-user builds a cart by selecting products from the product catalog. You use three applications to provide products to this catalog and to help the end-user find the products: *C3* Product Manager, *C3* Configurator, and *C3* Advisor.

C3 Product Manager

The Comergent *C3* Product Manager application provides a central location for creating, maintaining, and managing product information. Using *C3* Product Manager, you can create and maintain individual products, assemblies, and configurable products that correspond to models (created with Visual Modeler). You create and maintain these products in a hierarchy of product categories. *C3* Product Manager supports a product catalog with any number of hierarchical levels. Both products and subordinate categories (sub-categories) can exist in the same category within the product hierarchy.

Hot Spots

In the case of assemblies, the *C3* Product Manager application also supports the creation of clickable "hot spots" in a parts diagram image. This enables the end-user to display the image and add parts from an assembly to their cart by clicking the corresponding hot spots in the parts diagram image.

Pre-Configured Products

The *C3* Product Manager application also supports pre-configured products. A pre-configured product represents a set of default, picked options for a configurable product. The set of picked options results in a complete product. For example, you can create three versions of a configurable product, each representing a configuration most purchased by end-users. End-users can purchase each product as is, or they can decide to use the pre-configured product as a starting point for additional configuration. See the *Comergent eBusiness System Administration Guide* for more details.

Aggregated Products

In Release 7.1, *C3* Product Manager also supports the creation of aggregated products. An aggregated product is a product that consists of a collection of products, each of which is essentially the same as the others but differs in minor but significant ways. The differences would be too minute to merit them being separate products in a product category.

Not Sold Separately

Certain products are only meaningful in the context of a main item being purchased. For example a five-year warranty should only be purchased as an optional component to a configured solution. In previous releases of the Comergent eBusiness System, these products could be added as main items. In Release 7.1, you can check a box when you create a product that identifies the product as "cannot be sold separately". If this box is checked, then the product can be added as a component during configuration or as part of an assembly, but cannot be sold separately.

Supersession

The *C3* Product Manager application supports supersession. Each product includes effectivity dates during which the product is valid, enabling you to phase products in and out smoothly. When the current date is outside of a product's effectivity date range, the product becomes obsolete and can be superseded by another product. Your end-users can find new products by referencing the old product's ID number. You can create any number of levels of supersession, in which one product

supersedes another product that supersedes a third product. Other Comergent applications support the superseded products you create.

Suppressing Product Category Display

Some product categories may not contain displayable products. For example, a product category might contain products, but because those products are not on a price list assigned to the end-user's partner, the partner cannot see them, or products might have reached their expiration date.

You can set a business rule to suppress the display of such categories. *C3* Product Manager contains a button you can click to calculate whether a category display should be suppressed. You must periodically renew this calculation as products become displayable (for example, new products added) or not displayable (for example, expiration), for whatever reason. If suppression is not recalculated, then end-users will not see the products even though they exist and should be accessible.

Note:	Suppressed display of categories only applies to browsing the product catalog. If new products are added to an "empty" category, and if a recalculation is not done for the category, end-users can still access these products by searching or by using the *C3* Advisor guided selling experience.

Release 7.1 includes a pre-defined cron job that enables you schedule this calculation to occur automatically at regular intervals.

Exporting and Importing Product Data

Once you have created the product hierarchy, you can designate appropriate subsets to be exported to or imported from your partners. For example, if you are a manufacturer, then you might need to export your product catalog to your distributor partners so they always accurately reflect your product catalog. Similarly, if you are a distributor, then you might need to update your product catalog by importing the latest product data from the manufacturers that are your partners.

Note:	Only enterprise administrators can import and export product information through data syndication.

Refer to the *Comergent eBusiness System Administration Guide* for step-by-step instructions on importing or exporting your product catalog. Similarly, refer to the *Comergent eBusiness System Implementation Guide* for technical information about the data transfer formats that are currently supported.

Enabling Partners to Create Products on the Enterprise Site

A multi-vendor catalog (a product catalog that contains the products and services for multiple vendors) opens your product catalog to your selling partners. In this way, you enable them to expand your catalog and complement your products by including their value-added products and services in your product catalog.

As an enterprise administrator, you can open multiple product categories for each of your selling partners. For example, you sell notebooks and desktops. Three of your selling partners sell computer accessories that are complementary to your products. You can create three categories called notebooks, desktops, and accessories, respectively. You then open the accessories category to these three selling partners.

In the accessories product category, your selling partners may add their notebook cases, docking stations, external peripheral devices, extended repair warranties, and so on.

C3 Advisor

With the Comergent *C3* Advisor application, you can provide end-users with guided selling. As end-users provide answers to multiple-choice questions (created by you), they find products that match their requirements. In this way, you guide an end-user to a choice of products most appropriate for that end-user.

Using *C3* Product Manager, the administrators create and maintain features, and then assign these features to products. Then, using *C3* Advisor Administration again, the administrators create questions for the end-user. The answers, based on features assigned to products, determine the products the end-user sees. The administrator builds a questionnaire from these questions and answers.

FIGURE 6. Sample Questionnaire Page

You also use *C3* Advisor Administration to associate resources (data sheets, URLs, images, and so on) with questions, products, features, and so on.

Refer to the *Comergent eBusiness System Administration Guide* for more detailed information about *C3* Advisor and its concepts.

C3 Configurator and Visual Modeler

The *C3* Configurator application enables you to provide Web-based, build-to-order product configuration capability to your end-users. You can offer your end-users a complete range of available product options including complete pre-configured products containing predefined choices. End-users can purchase the pre-configured products as is, or use them as the starting point for additional configuration. The *C3* Configurator application fires rules that you write as a modeler to enforce valid configurations.

The *C3* Configurator application comprises two components: the Configurator Engine and Visual Modeler.

The Configurator Engine compiles model data from a runtime XML model file. This file displays in the end-user's browser as a selection of choices. The

Configurator Engine uses the end-user's choices, validated with a series of rules, to guide the end-user through the configuration of a product or service.

The Visual Modeler is a Web-based interactive graphical user interface that enables you to build the sophisticated models that the engine compiles. The *C3* Configurator application stores these model data in the Knowledgebase repository.

You place models into model groups in a multi-level hierarchy. Each model consists of option classes and, within those classes, option items. The option items are the choices the end-user makes to configure the product or service. You can create option class groups and option item groups. These represent building blocks of option class and option items that you can re-use across multiple models or within a single model.

In Release 7.1, you can copy certain entities (model groups, models, option class groups, option item groups, and so on), from one place in the hierarchy to another.

You define properties to represent some characteristic of a node in the model hierarchy: the model itself, option classes, or option items. You attach these properties to the appropriate node, then you can use these attached properties to define the rules which will be triggered as the end-user configures the product. Depending on how you define the rule, the results of the rule firing can display a message, add products to the end-user's cart, or assign values to a property (assignment). In this way, you can guide end-users to the proper configuration.

You can also organize the configuration page as a series of tabs, creating a tab-based user interface. When you define each tab, you define which properties and option items will display in each tab. This simplifies option item selection for the end-user.

You can also define values for display properties for the models, option classes, or option items. These display properties enable you to define the look and feel of the model: checkboxes or radio buttons, text that appears before the end-user selects, text that appears after the selection, a default selection, and so on.

You can also import pre-existing models into the Visual Modeler application, provided that these models are in the XML format specified by the *C3* Configurator document type definition (DTD).

As you build the model, the Visual Modeler gives you the opportunity to test your model at each step of the way.

Mobile Configurator

You can configure models offline. After installing the Mobile Configurator, you can display and configure a new model. You have the option of saving the model as

incomplete. You can rework or resolve the errors and complete the configuration later.

Maintaining and Customizing Price Lists

The Comergent **C3** Pricing application is integrated with other Comergent applications to enable you to deliver customized pricing upon request and is the sole repository of pricing information in the Comergent eBusiness System.

You can use **C3** Pricing to deliver prices to targeted partners. To do this, you create price lists specific to those partners and then associate the price list with the targeted partners. You can use multiple price lists to offer different prices to different partners.

Prices you create through **C3** Pricing can act as a kind of manufacturer's suggested retail. When end-users request price-and-availability from one or more partners, they will see the partner's prices.

When you create a price list, you select the products to be assigned to the list, then you set the base prices for those products within the context of the price list. You can also create conditional pricing rules that set discounted prices for each product on the list targeted to specific subsets of partners. For example, for a specific product, you can set a 10% discount for partners who have a membership level of Gold, or you can set a discount for partners who have a membership level of gold and are resellers.

You can also set auxiliary prices for products. Besides the price that the end-user pays when the product is ordered or shipped, there may be auxiliary prices if the product is associated with a duration-based good. For example, a cell phone has a one-time price as well as auxiliary prices associated with its service contract (a duration-based good), including activation and cancellation charges as well as recurring costs such as a monthly service fee.

You must also set a start and end date (effectivity dates) for each price list, a status (inactive or active), an assigned currency, and a customer type. The start and end dates define the range during which a price list is valid. If the current date is not within this range, then the price list is invalid and its prices are not used in any purchases. Similarly, a price list with an inactive status is also not used in any purchases.

You can also temporarily change a price list's status to inactive while updating pricing information. When changes are complete, you can change the status to active.

Note:	If a price list status is active and the current date is within the price list's effectivity dates, then any change made by a pricing administrator takes effect immediately.

Once you have used *C3* Pricing to create the lists and set the prices, you use *C3* Profile Manager to associate the particular price list(s) with a partner. The *C3* Pricing application displays the *lowest* price for the product based on the active price lists associated with that partner (and currency and customer type).

Note:	A partner user does not see and cannot purchase a product unless that product has been assigned to at least one active price list that is associated with that partner. Only the products contained on the partner's price lists are available for sale to that particular partner user. (Registered users belong to RegisteredUserPartner and anonymous users belong to AnonymousUserPartner.)

Customers and Prices

In Release 7.1, partners who are enabled for *C3* Partner.com can create customers, that is, they can create partner profiles for companies with which they do business. Typically, these are companies who have partner and user profiles created for them by the enterprise administrator. See "C3 Partner.com" on page 51 for more information.

To allow these customers to order products and see prices for those products, partners must create price lists to which the products are assigned, then assign the price lists to the appropriate customers.

Displaying Promotions with *C3* Promotions

The *C3* Promotions application enables enterprises and their partners to deliver marketing and promotional messages automatically to targeted end-users. Enterprises and their partners can use promotions to present cross-sell and up-sell opportunities by presenting alternative or complimentary products.

For example, an end-user requests price and availability from a distributor. This information is returned along with any distributor-specific promotions. The end-user may decide to complete an order with a specific distributor because of that distributor's promotions on one or more products in the order.

Companies that display promotions can differentiate themselves from their competition by presenting their own unique marketing messages. Typically, your company leverages end-user knowledge to create effective promotions that link the right end-user to the right products at the right time.

The Comergent eBusiness System dynamically generates promotions. An end-user clicks a promotion icon that is displayed in a cart or in the *C3* Advisor product comparison page to view the promotion.

Promotions may be associated with one or multiple products. They comprise the following features:

- Promotions are targeted to end-users based on any combination of partner type, partner level, and product interests.

- Effectivity dates may be used to coordinate with the starting and ending dates of marketing campaigns.

- Promotions with higher priorities take precedence over lower priority promotions.

- Promotions may be enabled or disabled at any time, regardless of their effectivity dates.

- Promotions can be represented by an image (in either a GIF or JPG file) or by a URL (for a page that provides the promotion text.

The preceding features provide marketing administrators with control over who may see promotions, when they may see promotions, and which promotion they see (if multiple promotions are applicable for a single product).

The Comergent eBusiness System determines at runtime which promotion, if any, is displayed to an end-user for a product. This decision is based on a set of promotion controls (rules) based on the partner type, partner level, and priority level of the promotion.

Marketing administrators use *C3* Promotions to accomplish these tasks:

- Create, modify, or delete promotions

- Disable promotions

- Determine the URL, image, or text description for a promotion

- Determine the effectivity dates for a promotion

- Determine the product(s) for each promotion

Refer to the *Comergent eBusiness System Administration Guide* for more detailed information on maintaining promotions.

Monitoring and Analyzing the Comergent eBusiness System

The Comergent eBusiness System includes applications and tools that provide you with analytics to manage your products and sales channels most effectively.

Inventory Collection

The *C3* Channels application enables you to collect product inventory information from your partners, giving you a real-time view into the total inventory of your products. This information enables you to react faster to market changes.

FIGURE 7. Inventory Collection Page

Once you have received inventory information, you can use the *C3* Analyzer application and view the inventory report. For more information, see "C3 Analyzer" on page 39.

Refer to the *Comergent eBusiness System Administration Guide* for step-by-step instructions on collecting inventory information.

Partner Forecast

Enterprises can use the Comergent eBusiness System to forecast demand for their products by asking their selling partners to submit periodic forecasts of demand for enterprise products. Once the forecasts have been submitted, you can use the *C3* Analyzer application to analyze the information.

The Comergent eBusiness System supports the submission of quarterly forecasts.

Your partners log into the Comergent eBusiness System server at the enterprise site and upload their sales forecast report by clicking the **Forecast** tab in their partner profile. Refer to the *Comergent eBusiness System Administration Guide* for additional information about sales forecasts.
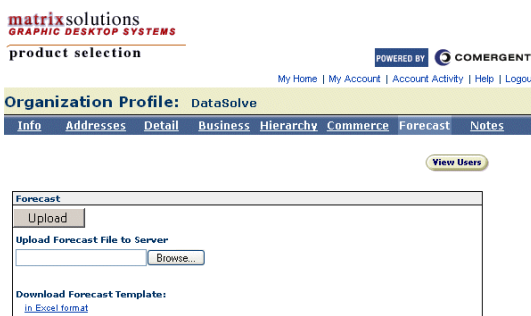
FIGURE 8. Partner Forecast Tab

Once you receive sales forecast information from your partners, you can use the *C3* Analyzer application to view the sales forecast report. For more information, see "C3 Analyzer" on page 39.

Viewing Partner Activity

You can view a partner's activity by clicking the View Account Activity button on the Profile Manager's Organization Profile page for that partner. You can search for specific activities such as orders, quotes, returns, or carts, view active carts, check invoices, search for or view sales contracts, and so on.

C3 Analyzer

The *C3* Analyzer application provides enterprises with insight into the commerce activities of end-users and partners. This application generates analytics that marketing managers can use to market, sell, and service the sales channel more effectively. By having immediate access to customer demand data, enterprises can

use this information to optimize product delivery through the sales channel and quickly respond to important events.

See the *Comergent eBusiness System Administration Guide* for a complete listing of the reports that can be generated.

Managing Leads

C3 Leads provides you with an integrated system for creating and assigning leads, working the leads, and converting them to orders. You (as the enterprise lead administrator) begin by creating the lead and assigning it to one or more partners. The enterprise lead administrator can view a list of the partners to whom the lead is assigned, as well as view details about the partner such as budget, probability of sale, and the status of the lead.

Each partner (in the form of a partner lead administrator) can accept or reject the lead. The partner lead administrator and partner lead users manage the lead as described in "Partner Leads Management" on page 56.

The enterprise lead administrator can add notes about the lead as well as view any notes added by the partner. The enterprise lead administrator can also view any activity and notes by the partners who are working the lead. When the partner has finished working the lead (by converting the lead to an order) and has closed the lead, the enterprise lead administrator can close the lead.

Providing Efficient Customer Service

After end-users have placed an order, you can use two applications to provide the end-user with effective customer service.

C3 Orders

In creating an order, an end-user selects product(s) and quantities to add to a product inquiry list. Once an end-user is satisfied with the product(s) and their configurations (if applicable) the end-user enters shipping and billing information and the shipping method and places the order. The *C3* Orders application provides you and your end-users with order management functionality from the time the order is placed until the order is completed and the products are delivered to your end-user. *C3* Orders also supports partial shipment of orders.

The *C3* Orders application provides information about the order status and order management at the line item. Each line item in an order has an individual status, and can have a separate shipping method, shipping address, or delivery date. End-

users can update order quantities, add, delete, or return individual line items in an order, and review order status. Customer service representatives can change and delete line items, change shipping and billing information, and change the delivery date. Using *C3* Orders, the customer service representative can also track in real-time any changes made to an order until it is delivered.

A customer service representative can create orders on behalf of partners. Acting as the partner, and choosing a customer type and currency code, the customer service representative has access to the same products and prices as the partner and can create orders on behalf of that partner.

Refer to the *Comergent eBusiness System Administration Guide* for step-by-step instructions on managing orders and creating orders on behalf of partners.

C3 Quotes

End-users can save their carts as quotes, or they can modify quantities and prices and submit them as a request to negotiate prices. The customer service representative can approve the request as submitted, or modify quantities and prices and approve the request as modified, or reject the request.

C3 Returns

The *C3* Returns application enables you to automate your product return process through your e-commerce Web site. Once an end-user has placed and received the partial or complete order, the end-user can select one or more line items to return subject to the following restrictions:

- An end-user cannot return line items until they have been shipped.

- An end-user can return all the line items in an order but cannot return the entire order as one unit.

- An end-user can return a partially shipped item. However, the end-user cannot change anything about that line item once the line item begins to ship.

  For example, an end-user can order 20 monitors, receive 15, and return 12. The end-user cannot change the shipping address for the 5 monitors that have not been received. Similarly, the end-user cannot increase the quantity to 23 monitors.

The *C3* Returns application acts as the front end to a back-end order management system in which the actual bookkeeping for returns is maintained. In this arrangement, the end-user initiating the return interacts with *C3* Returns. The actual returns processing (including validating returns, receiving returns, crediting the

end-user's account, shipping replacement products, and so on) is performed by the order management system.

Once the end-user has selected the line item to return, the *C3* Returns application receives the information and creates a return number that uniquely identifies this return request in the *C3* Returns application.

After creating the return number, the *C3* Returns application asks for a return request confirmation from the end-user. After receiving the confirmation, the *C3* Returns application runs this request against the returns rules engine. The return rules engine responds with one of three possibilities:

- Request is denied.

  The *C3* Returns application denies the request with a brief explanation and possibly, the contact information for customer service where the request may be pursued manually.

- Request is pending.

  The *C3* Returns application cannot make the decision automatically and requires the assistance of a customer service representative. *C3* Returns informs the end-user of the situation.

- Request is accepted.

  The *C3* Returns application gives the end-user additional instructions for the return, including waiting for the receipt of an email confirmation. This email confirmation contains a return material authorization (RMA) number and mailing instructions that are provided by the back end order management system.

When a request is pending, the customer service representative reviews the request and approves or rejects the return request. If the request is approved, then the customer service representative provides shipping instructions and labels and has the option to indicate which facility should process the return.

Job Scheduler

The Job Scheduler enables you to create and maintain cron jobs in the Comergent eBusiness System. In addition to typical system cron jobs (such as cache cleaning), you can set up application cron jobs to handle such things as product catalog import

and export. By setting a username and password, you can restrict the running of application cron jobs to entitled individuals.

Note:	The user that creates the cron job through the Job Scheduler link does not need to be the same user that runs the cron job. There can be two users: a job scheduler user (that creates the cron job) and an application user (that runs the cron job).

Using the Job Scheduler, you can display a list of jobs, create new jobs, display and update configuration information for a job, and determine the frequency of the job.

You can set both the starting and stopping time for a job, and the units for the job (for example, seconds, minutes, and so on). For more information on Job Scheduler, refer to the *Comergent eBusiness System Administration Guide*.

Configuration and Integration

The *C3* Commerce Manager application is the foundation upon which the other applications in the Comergent eBusiness System operate. It provides the core system services including security, data access management, and messaging. In addition, this application may be customized to provide e-commerce integration with other Internet applications and back-end enterprise resource planning (ERP) systems. It includes the ability to access heterogeneous data sources at the data layer level.

Application Platform Services

C3 Commerce Manager provides data services by handling all access to relational database management systems (RDBMS), file systems, and enterprise applications. In addition, these data services enable the use of XML messages or other industry standards (for example, RosettaNet) between your company and its distributed partners with secure server-to-server communications using the secure socket layer (SSL) protocol. These XML messages include remote price and availability checks, the transfer of product inquiry lists to partners, the syndication of product catalog data, and so on.

This application also manages user authentication, login entitlements, and access control lists (Comergent application users' read, write, insert, and delete privileges).

For more information on XML messages and Comergent security, refer to the *Comergent eBusiness System Reference Guide*.

System Configuration

The *C3* Commerce Manager enables you to set certain properties that define the behavior of the modules in the Comergent eBusiness System.

The Business Rules Manager enables you to define the business rules for the applications, that is, how the end-user experience will behave for your end-users. For example, you can decide to display promotions automatically to end-users, or you can choose to disable anonymous end-users access to your marketplace.

The System Administration tool enables you to define the technical parameters for the Comergent eBusiness System. For example, administrators can set the system debug level, the maximum number of database connections, the directory location of files, internationalization defaults, and so on.

Integrating with Back-end Applications

The Comergent eBusiness System includes two products that enable you to integrate with back-end systems: *C3* Integrator and *C3* Commerce Manager.

C3 Integrator

The *C3* Integrator application enables the flow of business data between the Comergent eBusiness System and back-end systems including enterprise resource planning (ERP) and other enterprise applications. This bidirectional data flow occurs in real-time, event-driven transactions or scheduled batch operations.

This application also contains prebuilt adapters to certain ERP systems. These adapters handle the management of the application connection including initialization, connection, verification, and shutdown. For more information on these adapters, refer to the *Comergent eBusiness System Implementation Guide*.

C3 Integrator also provides graphical monitoring and management tools for the design of interfaces between Comergent and other enterprise applications. Graphical tree representations of complex data structures enable you to perform data transformations and translations using drag-and-drop operations.

C3 Commerce Manager

Among its other capabilities (see "C3 Commerce Manager™" on page 6), *C3* Commerce Manager enables your e-commerce system to integrate with external e-commerce procurement systems. Your company can participate in net marketplaces by distributing targeted information while still controlling product data from a central location. Your company can control the selling experience (guided selling, needs analysis, product search, comparison, configuration, and promotions).

For example, one business scenario is simply to support product catalog data syndication. Your product catalog is maintained at one central location and targeted data is distributed in various net market catalogs. You decide which products are displayed in various net markets, enabling your company to maintain control over where and how your products are sold. Your company performs periodic data syndication to ensure your product data is always up-to-date and accurate.

Alternately, a net market end-user indicates interest in one of your products. The net market punches into your e-commerce Web site. The end-user selects and if appropriate, configures the product(s). Your company then passes the end-user back to the net marketplace with his selected products for completing the transaction.

CHAPTER 4   *Partners and the Comergent eBusiness System*

CHAPTER 2, "End-User Experience" described how end-users experience the Comergent eBusiness System. CHAPTER 3, "Managing the End-User Experience" described how you, as enterprise employees, use the Comergent eBusiness System to provide this experience. This chapter describes how your selling partners, in the person of a partner administrator, manage the system.

Creating Partner Users

Enterprise administrators must create at least one partner user with the Administrator role for each of their partners. Partner administrators are partner users with additional privileges, including the responsibility for creating and managing the users for that partner.

The following are the entitlement roles a partner administrator can grant to a partner user:

- CommerceUser/User

  This role enables partner users to log into your enterprise site as commerce customers. These partner users maintain their own user profile, including their preferred locale.

- Administrator

  All partner administrators can create other partner users and update the partner as well as their own user profile. Depending on their relationship with your enterprise, partner administrators may have additional responsibilities, described later in this chapter.

- Lead User

  The partner lead administrator assigns the lead to one or more people who have the lead user role. The partner lead user works with the lead contact to convert the lead to an order.

- ProcurementUser

  This role enables partner users to punch into the Comergent eBusiness System from external e-commerce procurement systems. Authentication information is stored in this partner user profile.

Creating Users for Customers

As described in "C3 Partner.com" on page 51, partners enabled for *C3* Partner.com are either Partner.com Partners or Storefront Partners. Partner administrators for either can create partners called customers. The partner administrator can create users for these customers with the following roles:

- Administrator (Storefront Partners only)

  These users can create other users and update the partner as well as their own user profile.

- CommerceUser (Storefront Partner only)

  These users can log into the storefront maintained for the Storefront Partner by the enterprise and participate in the commerce experience.

- TransferUser

  Users with this role typically are associated with partners who also have a partner profile and a user profile created by the enterprise administrator. The user logs into the enterprise site with the username and password assigned by the enterprise administrator. When they perform a price-and-availability check with the *C3* Partner.com-enabled partner for whom they are a customer, they can use either their enterprise username and password or their customer username and password. Using the latter gives them access to special prices.

Updating Partner Information

Enterprise administrators create a partner profile for each of their partners. Once the partner profile has been created, it is the responsibility of a partner administrator to maintain the information contained in the partner profile.

Partner administrators can add and modify information contained in their partner profile. However, they cannot modify certain fields that remain the responsibility of the enterprise administrator.

FIGURE 9. **Partner Profile**

Creating a Partner Hierarchy

Partners may have their companies divided into complex organizational structures. For example, a partner may comprise management companies, divisions, locations, and departments. A partner could even have more complicated structures such as

franchises and retail outlet chains. In Release 7.1, you can mirror these complex structures by creating not simply a partner but a hierarchy belonging to a partner.

The Hierarchy tab enables partner administrators to create a hierarchy structure of an unlimited number of levels in the hierarchy. Also, when a price list is assigned to the parent, the list can be marked as "sharable", meaning that any descendents of the parent are also assigned this price list.
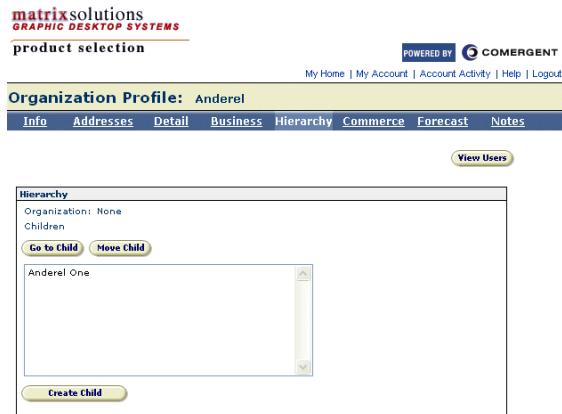
FIGURE 10. Hierarchy Tab

Uploading your Partner Forecast

Enterprises can use the Comergent eBusiness System to forecast demand for their products by asking their selling partners to submit periodic forecasts of demand for enterprise products. Once the forecasts have been submitted, the enterprise can use the *C3* Analyzer application to analyze the information.

The Comergent eBusiness System supports the submission of quarterly forecasts.

FIGURE 11. Partner Forecast Tab

C3 Partner.com

Some of your selling partners may not have the hardware or the infrastructure to maintain their own e-commerce Web site. However, these partners can still participate in e-commerce through a deployment enabled for *C3* Partner.com. You, as the enterprise, or one of Comergent's application service provider (ASP) partners may host *C3* Partner.com for your partners.

In Release 7.1, partners are enabled for *C3* Partner.com as one of two types of partner: as a Partner.com Partner or as a Storefront Partner.

Partner.com Partners gain the same advantages of e-business as other partners in the Comergent eBusiness System. End-users can log into the enterprise site, select products, and then be able to select the Partner.com Partner for price and availability checks or product inquiry list transfers. With the ability to create partners called customers, the Partner.com Partner can give special prices and access to additional products to users belonging to these customers. Also, when a partner is enabled for *C3* Partner.com, the partner's name is used in conjunction with a URL to define the Web site that customers can log into to obtain order information.

Storefront Partners provide the same services but, in addition, they provide a storefront. They can also create customers. End-users created for these customers can access the URL, defined when the partner is enabled, and order products directly from the storefront. In addition, the Storefront Partner can provide special pricing and products to end-users associated with their customers.

Administration Tasks

Administrators of partners enabled for *C3* Partner.com must perform the administration tasks to manage their site. These tasks include:

- using the *C3* Profile Manager application to manage their partners and users

- viewing commerce activity

- using the *C3* Pricing application to create and maintain their price lists

    Like enterprise administrators, partner administrators can create price lists. They notify the enterprise administrator, who assigns them to the appropriate partners.

- using the *C3* Product Manager application to create products

In addition, administrators for partners enabled for *C3* Partner.com must manage additional tasks that are specific to the environment:

- uploading product and product availability

- uploading the partner logo (for display on the partner pages that are displayed to the customer)

- uploading email templates

    The email templates include notifying the partner that an order has been placed, notifying the customer that the order has been received by the partner, and notifying the customer regarding any updates on the order

- creating customers. As customers of a Storefront Partner, partner users of these customers can log into an online store and order products through a branded storefront. As customers of a Partner.com Partner, as described above, they have the opportunity to participate in special pricing and to view special products.

Partners and Promotions

Partners may purchase the *C3* Promotions application and use it to create promotions. Partner administrators associate promotions with line items through their product ID.

In a typical Comergent eBusiness System installation, partner servers respond to price and availability requests received from enterprise servers. Typically, the

response to the request is a reply message that provides a price element and an availability for each line item in the original request.

With the *C3* Promotions application, partners can enhance a reply message by including marketing messages, or promotions. When the enterprise server receives the reply message and displays the price and availability information to the customer, icons are displayed next to line items with a promotion.

See "Displaying Promotions with C3 Promotions" on page 36 for additional information about this application.

Creating Products

As the enterprise, you can decide whether or not you want to participate in a multi-vendor catalog. By offering this service, you can give your (and your selling partners') customers a one-stop shopping experience. Otherwise, these customers must go to multiple e-commerce Web sites and create multiple orders to purchase all the products they need.

In this and the following section, we describe an example in which the enterprise is a manufacturer. This enterprise has several distributors as selling partners. Customers (resellers) visit the enterprise e-commerce Web site and search for products but purchase these products indirectly from the enterprise through a distributor. In this simplified example, each reseller is associated with and may purchase products from only *one* distributor.

Your enterprise company manufactures notebook computers. You also sell some supplemental products including a docking station and a floppy disk drive. However, you do not sell extended service warranties or notebook carrying cases. Two of your selling partners offer these products. (One partner, North America Computer Accessories, operates in North America and the other partner, Asia Computer Accessories, operates in Asia.) You can open your product catalog to these selling partners by creating a multi-vendor catalog.

Both of your selling partners can add their products (extended service warranties and carrying cases) into your product catalog. You determine where these companies can add their products. For example, you may decide to create a product catalog called "Accessories" and create two subcategories called "Warranties" and "Notebook Carrying Cases". You then "open" these two subcategories to your selling partners using the *C3* Product Manager application. In this example, your selling partners can add their products into these two product categories.

Alternately, you may want to create your product catalog based on your customer's geographic location. Your top level product categories are North America, South

America, Europe and Asia. You open the "Accessories", "Warranties", and "Notebook Carrying Cases" subcategories in North America to North America Computer Accessories. Similarly, you open the "Accessories", "Warranties", and "Notebook Carrying Cases" subcategories in Asia to Asia Computer Accessories.Your selling partners can add their products into the appropriate product categories, based on their geographic location.

As an enterprise administrator, you will see your products and product categories, your selling partners' products, and any product categories your selling partners create, when you view the product catalog. In this example, an enterprise administrator sees the enterprise products, North America Computer Accessories' products, and Asia Computer Accessories' products. By seeing all products, you can correct any errors that may arise.

Partner administrators will see the enterprise products and product categories, and the products and product categories they create. That is, partner administrators at North America Computer Accessories will only see Enterprise products and North America Computer Accessories products. They will not see any Asia Computer Accessories products.

Note:	All administrators at a partner company have equal privileges. A partner administrator can modify or delete a product that another partner administrator (at the *same* company) has created.

When indirect customers view your product catalog, they see only products on price lists associated with their partner company. As an enterprise administrator, it is *your responsibility* to associate the right price lists to your customers. North American companies should only see products appropriate for them. You should not associate any price lists created by Asia Computer Accessories to these North American companies.

For detailed information on opening product categories to partner administrators, refer to the *Comergent eBusiness System Administration Guide*.

Creating Price Lists

In the preceding section, we described an example of two selling partners (distributors) adding products to your multi-vendor catalog. These two selling partners resell your products and sell their products to their customers (your indirect customers).

Your selling partners can create price lists for products in product categories that are "open" to them by using the *C3* Pricing application. Partner administrators

create price lists containing their products and your (enterprise) products that they resell.

Partner administrators can modify or delete only those prices lists they or their fellow administrators (at the same company) have created. All partner administrators at a selling partner equally "own" the price lists they have created.

Although partner administrators can create price lists, they *cannot* associate price lists to partners. Only you, as enterprise administrator, can associate price lists.

When partner administrators finish creating new price lists, they inform you, the enterprise administrator, that the price lists are complete. They also list the partners (in this example, resellers) that should be associated with the price lists.

Note:	It is *your responsibility* to associate the right price lists to your customers.

As an enterprise administrator, you create these partners (if they do not already exist) using the *C3* Profile Manager application. You then associate the appropriate price list(s) created by the partner administrators to each of these partners.

When customers (resellers) log into your enterprise e-commerce Web site, they see those products on the price lists associated to them.

As with the product catalog, you, as enterprise administrator, create and can modify *all* price lists, including those created by your selling partners. By seeing all price lists, you can correct any errors that may arise in pricing.

Pricing for Partners Participating in a Multi-Vendor Catalog

The Comergent eBusiness System includes the concept of a multi-vendor catalog (a product catalog that contains the products and services from multiple vendors). By creating a multi-vendor catalog, you and your selling partners can provide an "one stop" shopping experience for your customers. As the enterprise, you can offer your selling partners the opportunity to maintain their own products and pricing in a catalog environment you have created. Partner administrators can create products and product categories, and create and maintain price lists.

Creating Price Lists

Like enterprise administrators, partner administrators can create price lists. They can add any products in product categories that are "open" to their partner to the price lists they create. For more information on making products available to partners, see "Enabling Partners to Create Products on the Enterprise Site" on page 32.

All partner administrators have full and equal access to price lists created by any partner administrator at their company. However, partner administrators *do not*

have access to price lists created by another company's partner administrator, nor any price lists created by an enterprise administrator.

Note:	Enterprise administrators have full access to all price lists, including those created by any partner administrator. An enterprise administrator can modify or delete price lists created by a partner administrator.

Associating Price Lists

Unlike enterprise administrators, partner administrators *cannot* associate price lists with partners. After creating a price list, a partner administrator must tell the appropriate enterprise administrator the name of the new price list and the partner(s) to whom the price list should be assigned.

Partner Leads Management

The enterprise creates and assigns leads to partners as described in "Providing Efficient Customer Service" on page 40. After an enterprise (in the person of an enterprise lead administrator) assigns a lead to one or more of its partners, the partner lead administrator can accept or reject the lead. If they accept the lead, then they assign the lead to one or more partner lead users.

The partner lead users work with the lead contacts to find the products wanted by the lead. Working through *C3* Leads, partner lead users can fill a product inquiry list just as if they were the end-user creating the list (as described in CHAPTER 2, "End-User Experience"). They can search for products, use a questionnaire to find the right product, or browse the product catalog. Once the partner lead user has the products desired by the lead, the partner can complete the cycle by converting the product to an order. As they work the leads, the partners can add detailed notes about their activity.

New Features in Release 6.0

This chapter provides an overview of the new features added to the Comergent eBusiness System since Release 5.5.1.

The following sections describe the features in this release:

- C3 Advisor
- C3 Analyzer
- C3 Channels
- C3 Commerce Manager
- C3 Configurator
- C3 Integrator
- C3 Leads
- C3 Promotions
- C3 Orders
- C3 Partner.com
- C3 Portal
- C3 Pricing
- C3 Product Manager

- C3 Profile Manager
- C3 Quotes
- C3 Returns

C3 **Advisor**

The *C3* Advisor has the following enhancements:

- Feature Management can now be performed through both *C3* Product Manager and *C3* Advisor.

C3 **Analyzer**

The *C3* Analyzer product has been updated to provide performance enhancements. The product has also added Partner Relationship Management (PRM) reports. In addition, the current release includes enhanced security and I18N compliance.

C3 **Channels**

This new module contains the following functionality, which existed previously under other modules: forecasting, inventory collection, and partner selector.

C3 **Commerce Manager**

In Release 6.0, the Comergent eBusiness System has undergone a series of architectural changes, designed to make implementation easier to customize and upgrade.

- The Comergent eBusiness System is developed as a set of interdependent modules that conform to a common organizational structure.
- The capability to localize the Comergent eBusiness System has been enhanced with support for displaying localized text on every page using resource bundles.

C3 **Configurator**

The *C3* Configurator application has the following changes in this release:

- Enhancements to usability for the Visual Modeler.

- A search window in Visual Modeler enables users to search for entities (option classes, option items, and so on) within a model group.

- Ability to copy entities from one place to another in Visual Modeler.

- Ability to create a tab-based user interface for configuration.

- Ability to define message types in constraint tables as error, warning, or suggestion.

- Ability to produce reports about models and their properties.

In addition, *C3* Configurator now supports the Mobile Configurator, an application that can be used to configure models while not connected to the Comergent eBusiness System.

C3 Integrator

The *C3* Integrator application has not changed in this release.

C3 Leads

The *C3* Leads application is a new application that enables an integrated leads management system.

A lead administrator can create the lead and assign it to one or more partners. The enterprise lead administrator can view a list of the partners to whom the lead is assigned, as well as view details about the partner such as territory, partner type, and partner level, and details about the lead such as lead status, budget, and probability of sale.

Each partner (in the form of a partner lead administrator) can accept or reject the lead. The partner lead administrator and partner lead users manage the lead.

The enterprise lead administrator can add notes about the lead as well as view any notes added by the partner. The enterprise lead administrator can also view any activity and notes by the partners who are working the lead. When the partner has finished working the lead (by converting the lead to an order) and has closed the lead, the enterprise lead administrator can view the revenue associated with the lead and close the lead.

C3 Promotions

The *C3* Promotions application has not changed in this release.

C3 **Orders**

The *C3* Orders application has the following changes:

- Supports the ability of an enterprise user with the Customer Service Representative role to create an inquiry list or an order on behalf of a partner user.

- Supports the ability of an enterprise user with the Customer Service Representative role to modify a quote created by a partner user.

- Supports placing spending limits on partner users, as well as the ability to designate people who can approve or reject orders above the spending limits.

- The change history of an order and each line item is saved and can be reviewed by customer service representatives.

C3 **Partner.com**

The *C3* Partner.com application now enables two types of customers: Partner.com Partners and Storefront Partners. The Partner.com Partner has all the order creation capabilities. The Storefront Partner is enabled for customers to log in directly to an "online store". In addition, the Storefront Partner is enabled to do business with indirect partners of the enterprise.

Both types of partner can:

- maintain their own specific product information

- maintain their own specific pricing information

- maintain their own customer profiles and their users

- maintain their own co-branding information

- maintain their own email notification templates

- create a set of customers and users that belong to their customers. See "C3 Partner.com" on page 51.

In addition, *C3* Partner.com now enables a richer set of order management capabilities.

C3 **Portal**

The *C3* Portal application now includes a customized version of the Jetspeed Web application produced under the auspices of the Jakarta Project of the Apache Software Foundation. See http://www.apache.org for further information about the project.

C3 **Pricing**

The *C3* Pricing application now enables you to duplicate not only the price lists, but also the partner assignments for the price list(s) you are duplicating.

When you assign price lists to partners, you can mark those lists as "sharable". This means that the price list can be used not only by the partner to whom you assigned it, but also to any partners below them in the partner hierarchy.

You can also set a business rule that sets pricing as optional.

C3 **Product Manager**

The *C3* Product Manager application has the following changes in this release:

• Ability to create entities called aggregated products. An aggregated product is a product that represents a group of similar products.

• Ability to assign products to multiple categories.

• Supports "suppressed" display of empty product categories. This means that the end-user does not see any categories if there are no selectable products in the category.

• Ability to create products as "not sold separately", such as warranties, licenses, and so on.

• There have been several enhancements to usability, including a Hierarchical Entity Chooser that enables you to browse the product catalog for entities (products, product categories, and so on) that you need to fill certain fields.

• Feature management can be performed through *C3* Product Manager in addition to *C3* Advisor.

- Ability to add parts diagrams to assembly products and to create "clickable hot spots" to the diagrams, enabling users to select assembly components by clicking a hot spot.

C3 Profile Manager

The *C3* Profile Manager has the following changes for this release:

- Supports the ability to create a partner hierarchy for each partner to reflect their organizational structure such as divisions, subsidiary companies, franchises, and so on.

- Ability to set a spending limit for partner users, as well as define those who can approve orders when partner user goes above the spending limit.

- Supports the ability to move users from one location in a partner hierarchy to another.

- Supports the ability to move child partners from one location in a partner hierarchy to another.

- Ability to enable partners for *C3* Partner.com.

- Ability for partners enabled for *C3* Partner.com to create and maintain customers and customer users.

C3 Quotes

The *C3* Quotes application has the following changes for this release:

- Enables direct commerce and registered users to convert a product inquiry list into a quote or a request for quote (RFQ), an RFQ to a quote, and a quote to an order.

- Product inquiry lists support non-validated line items (that is, line items without product IDs) and these are transferred from enterprise to partner when the inquiry list is transferred.

- Enables direct commerce users to check for availability before placing their order.

- Enables direct commerce users to see shipping company and shipping tracking numbers for each line item.

- Enables customer service representatives to modify and approve or reject submitted RFQs.

- Indirect commerce users can transfer inquiry lists to both external partners and *C3* Partner.com partners on the enterprise site.

- Supports the automatic merging of product inquiry list lines that reference the same product.

- Currency and customer type are saved with product inquiry lists so that when they are re-opened prices are displayed correctly.

C3 **Returns**

The *C3* Returns application has not changed in this release.

New Features in Release 6.3

This chapter provides an overview of the new features added to the Comergent eBusiness System since Release 6.0.

The following sections describe the features in this release:

- C3 Analyzer
- Catalog Search
- Invoices
- Pricing Administration
- Pricing Rules and Coupons
- Locale-Based Promotions
- Storefront Enhancements
- Widgets

C3 Analyzer

This release of the Comergent eBusiness System has introduced two major enhancements to the reporting capabilities of the Comergent eBusiness System.

Firstly, new reports have been introduced that provide a wealth of visibility into the activity of your customers and partners on your e-commerce site. These have been organized into "dashboards" that focus in on critical parts of your business: your direct customers; your indirect customers who are buying through your channel partners; and your channel partners themselves.

Secondly, *C3* Analyzer has been upgraded to take advantage of the next generation of software from our software partner, Actuate. Enhancements include the ability to better tailor the reporting experience for your users across different languages and countries. In addition, additional security enhancements mean that you can manage which of your employees can see which reports.

Catalog Search

This release of the Comergent eBusiness System introduces sophisticated search capabilities to help your customers find the ideal product. Customers can search on a range of criteria including: product IDs, product names, key words in product descriptions, features of products. Customers can even search for obsolete products to see what products have replaced them.

Search can be customized so that synonyms and related words are grouped to help a customer find something when they are not sure of the exact terms to use. The search can be extensively customized to rank search results by different criteria and a Web-based user interface for administration means that all aspects of search can be managed remotely if need be.

Customers can restrict the range of the search to only product categories that interest them. They can rank the importance of their search criteria so that the products most likely to match are presented first. Search results can be displayed as a ranked list or by product category to help users find their target product quickly.

The search capabilities are integrated with the other capabilities of the Comergent eBusiness System so that search results only display products that customers can buy and which are currently available.

Invoices

Release 6.3 introduces the ability of the Comergent eBusiness System to manage invoices. Your enterprise Accounts Receivable staff can manage invoices by tracking their status through the Comergent eBusiness System. Accounts Payable staff at your customers can notify you when your invoices get paid, and can notify

if they have any problems or need to work with an Accounts Receivable person to resolve an issue.

Invoices can be originated in an third-party system such as ERP system and then posted into the Comergent eBusiness System using a public XML API. Once in the Comergent eBusiness System, you can track and report on the status of every invoice.

Pricing Administration

The Comergent eBusiness System provides an advanced pricing capability that enables you to provide exactly the right price for each product to each customer. This release of the Comergent eBusiness System enhances the pricing application in several ways:

- Special prices: You can create special prices for products on price lists in two different ways:

    - You can specify special prices (either as absolute changes or percentages) that should be applied to certain partners or when other conditions apply.

    - You can specify tiered quantity prices so that as customers buy more of an item, the price can be reduced to offer volume discounts. If need be, you can even increase the price of an item in limited supply as customers buy more.

- Bulk updating: you can update the prices on a price list at any time using a new user interface. It lets you specify the update in terms of absolute price changes or as percentage changes, and you can determine whether the update is applied to the whole product catalog or to just part of it.

- You can quickly review the assignment of a price list to your partners and perform a quick assignment or unassignment of the price list to all partners if you need to roll out new prices quickly.

- Significant performance enhancements add to the speed and flexibility of the user interface.

Pricing Rules and Coupons

The Comergent eBusiness System has introduced two new mechanisms to help you price your products precisely for each customer.

- Pricing Rules: Using the Comergent eBusiness System, you can introduce rules that give you up-sell and cross-sell opportunities. For example, you can write rules that make offers such as "Buy one, get one free!" or "Buy a desktop computer and get a printer for half-price!".

  These rules can be tailor-made for particular customers by targeting specific types of partners or by creating rules for particular currencies.

- Coupons: The pricing rules are designed so that customers can apply them to their orders using coupons. Simply by entering the coupon number, they can add it to their purchase. Coupons can be marked as single use so that customers may only use them once.

Locale-Based Promotions

In Release 6.3, you can control which promotions are seen by which customers based on their locale. Using this mechanism, you can ensure that customers see marketing messages that are tailor-made for where they live and in the correct language for each user.

Storefront Enhancements

Release 6.0 of the Comergent eBusiness System introduced the concept of storefront partners: partners who can maintain their own direct e-commerce Web site on your Comergent eBusiness System. Storefront partners can sell directly to their own customers by setting their own prices for their customers and enabling your indirect commerce partner users to transfer their inquiry lists to their storefront.

In this release, this capability has been extended with these new features:

- Promotions: Storefront partners can create their own promotions so that customers see these as they buy from your storefront partners. The storefront promotions can be displayed when the customer is checking prices or after they transfer their inquiry list to a selected storefront. In both cases, the promotions can be tied to an image uploaded by the storefront partner or to a Web page that provides more information.

- Product ID management: storefront administrators can now perform more remote management of the products by uploading text files. In this way, they can manage availability information and product ID mapping information (between your enterprise product IDs and theirs) more easily using their own spreadsheets or text files.

- Shipping information: customers buying through partner storefronts can now manage shipping information at the line item level. In this way, they can ensure that particular products are shipped to different places if they need to.

Widgets

The Comergent eBusiness System supports a mechanism to create small Web-based panels that provide quick access to more detailed information: these are called widgets. This release introduces lots of new widgets including:

- Active Lists Widget: provides customers access to the most recently accessed inquiry lists.

- Leads Widget: provides direct commerce users access to new leads assigned to them.

- Leads Search Widget: provides direct commerce users with the ability to search for leads.

- Promotions Widget: enterprise marketing managers can ensure that special promotions are displayed to customers on their home page.

- Quotes Widget: provides customers access to their most recent quotes.

- Received Orders Widget: provides storefront administrators access to their most-recently placed orders from customers.

- Requests for Quote Widget: provides customers access to their most recent requests for special pricing.

- Returns Widget: provides customers access to their most recent return requests.

- Routed Lists Widget: provides customers access to the inquiry lists that they currently have routed to other users.

- Transaction Search Widget: enables customers to quickly search for orders and quotes.

CHAPTER 7

New Features in Release 6.4

This chapter provides an overview of the new features added to the Comergent eBusiness System since Release 6.3.1.

The following sections describe the features in this release:

- C3 Advisor
- C3 Analyzer
- Catalog Search
- C3 Configurator
- C3 Invoicing
- C3 Leads
- C3 Order Manager
- C3 Pricing
- Pricing Rules and Coupons
- C3 Product Manager
- C3 Profile Manager
- Storefront Enhancements
- Widgets

C3 Advisor

In this release, you can now use both "AND" and "OR" in defining the questions and answers in the questionnaire. That is, you can now specify that a user can provide any or all answers to a question, and you can specify whether any or all features are used to determine which products match the answers provided by the user.

C3 Analyzer

This release of the Comergent eBusiness System has introduced two major enhancements to the reporting capabilities of the Comergent eBusiness System.

Firstly, the organization of reports has been modified so that a single installation of the Actuate Server can support multiple installations of the Comergent eBusiness System. This enables the Actuate Server to "host" several implementations of *C3* Analyzer each of which connect to a different Comergent eBusiness System.

Secondly, *C3* Analyzer has been upgraded to take advantage of the next generation of software from our software partner, Actuate. Enhancements include the use of SOAP Web services to access reports and better scheduling capabilities for the dashboard graphs.

Catalog Search

This release of the Comergent eBusiness System introduces the ability to generate new search indexes incrementally. That is, as product data changes you do not have re-generate the entire product catalog index: instead you just have to generate new index entries for new products and products whose data has changed.

You can also delete search indexes once they are no longer useful.

C3 Configurator

This release provides the following enhancements:

*   Rule firing strategy: when a user configures a product, all the rules assigned to the associated model are fired. In previous releases, there is a single pass through all of the rules. In this release, you can specify that multiple passes are made through the list of associated rules. As a result, if

the firing of one rule changes the model in some way, then you can be sure that other rules that might be affected by the change are fired too.

• New control types are provided so that you can display a list of option items as a table. In the table you can display properties of each option item so that it is easier to compare option item selections.

• Rule tracing: the display of what happens when a product is configured has been improved to make it easier to read how rules have fired.

• User-entered values in rules: you can create models that allow users to enter values in certain fields. Rules can now be written so that they can use such user-entered values in their calculations.

• Display of property values to end-users: the *C3* Configurator now supports the ability to display property values to end-users. This means that you can define property values for option items, and then have these values displayed as the end-user makes their selection as they configure the product. Default values can be defined for situations where the property is not defined and formatting can be specified.

• Mathematical expressions in rules: modelers can now define mathematical expressions in their definition of expansion rows so that one expansion row can now dynamically calculate the number of items that should be added to a product configuration.

• Models can be used to support sub-configurations: end-users can configure a product and while doing so, configure a sub-configuration before returning to the first configuration task. This enables modelers to break down the configuration of a complex product into configurable components.

C3 Invoicing

There are no changes in this application.

C3 Leads

This application has been considerably enhanced in Release 6.4. Leads are now created by an enterprise lead administrator. They can capture all the relevant contact information for a lead. The lead administrator can assign leads to any partner that has a sales manager partner user and can assign leads to the enterprise if a sales manager enterprise user has been created. A lead administrator can create a

proposal as part of the lead: this is a list of the products that the lead administrator thinks the contact is interested in.

Leads can be uploaded directly into the system as XML files. They can be automatically assigned to partners or the assignment can be performed manually.

When a lead is assigned to a partner, an opportunity is created and each partner works their opportunities independently of other partners.

Sales managers can accept or decline opportunities and can delegate them to other partner users who have been assigned the sales rep role. Sales reps can work the opportunity by adjusting the prices of products in proposals by applying uplifts and discounts. When the sales rep prints out the proposal, only the discount field is displayed and the uplift is suppressed. They can create more than one proposal and make use of the product catalog, its advanced search capabilities, and the *C3* Advisor questionnaire as they prepare their proposals.

Proposals can be converted directly into orders and so partners can track the progress of an opportunity all the way from first receiving it to converting it into business.

C3 Order Manager

This release has added a number of enhancements to the management of orders:

- order process modeler: the logic of the order process is managed by the order process modeler. This makes use of an order state machine that defines what states an order can be in and which controls the business logic as an order is moved from one state to another. The state machine architecture provides a mechanism for managing the states and business logic without changing the underlying code in the order management applications. An XML file is used to express the logic of the order process modeler, and by changing this you can change how orders are processed by the Comergent eBusiness System.

- order brokering: each product can be assigned to designated supplier partner. When an inquiry list is turned into an order, it is "brokered" into orders, one for each supplier of products in the inquiry list.

C3 Pricing

This release provides the following enhancements:

- price list line item effectivity: you can specify effectivity dates at the line item level. This means that you can offer special prices for a product simply by adding a price list line item to an existing price list which is effective for only a defined period.

- price list suppliers: when a price list is created, it is assigned a supplier ID. This determines whether it is an enterprise price list or a partner price list. Enterprise price lists are used to specify prices as end-users browse and buy products as customers of the enterprise, and partner price lists are used when end-users shop at partner storefronts.

- price list import: you can import a price list as an XML file. This provides for greater integration with third-party pricing resources.

Pricing Rules and Coupons

In this release, you can use features to help define pricing rules. For example, you can specify an item quantity rule pricing rule of the form "buy five of any of our laptops and receive a 10% discount". This rule would be valid for any product that has been assigned a laptop feature.

You can also define pricing rules that act on more than one product, and so if you want to apply the same pricing rule to a number of discounts, you can now define one rule rather than one for each product.

C3 Product Manager

The following new features and enhancements have been added to this release of the Comergent eBusiness System:

- pricing in the *C3* Product Manager user interface: you can now assign products to price lists from the product detail page. This speeds up the pricing of products.

- related products: you can specify that one product (product A) is "related" to another product (say product B). When you do this, if a user views the product detail page for the product B, then a list is provided of related products and Product A is listed here. This provides a way for you to cross-sell related products to your customers.

- service products: you can designate products to be service products. If a service product is configurable, then prices that are returned from the *C3* Configurator are preserved as the customer places their order.

- managed release of products: in this release, you can create a product, but you do not need to make it immediately available to end-users. Similarly, if you need to temporarily withdraw a product from the product catalog, you can do so without changing its effectivity dates and pricing.

- feature assignment to categories: by assigning features to product categories, you can now assign features to products more rapidly.

- product suppliers: you can now specify that certain products are supplied by partners. When an inquiry list is turned into an order, it is "brokered" into smaller orders, one for each partner that supplies products in the inquiry list.

- catalog import: this feature now supports the automatic identification of additional fields and their import as part of the product catalog import processing.

C3 Profile Manager

This release has added a "Forgot Password" function so that if users have forgotten their password, they can create a new one through the Web user interface.

Storefront Enhancements

Partner price lists are now used to price products as end-users shop at partner storefronts. This means that both enterprise administrators and partner administrators can create price lists for storefronts.

Widgets

There are no changes in this application.

CHAPTER 8

New Features in Release 6.7

This chapter provides an overview of the new features added to the Comergent eBusiness System since Release 6.4.1.

The following sections describe the features in this release:

- C3 Advisor
- C3 Analyzer
- Catalog Search
- C3 Campaigns
- C3 Configurator
- C3 Invoicing
- C3 Leads
- C3 Order Manager
- C3 Pricing
- C3 Product Manager
- C3 Profile Manager
- Storefront Enhancements
- C3 Task Manager

- Widgets

C3 **Advisor**

There are no changes in this application.

C3 **Analyzer**

There are no changes in this application.

Catalog Search

There are no changes in this application.

C3 **Campaigns**

Release 6.7 introduces a new application to the Comergent eBusiness System: *C3* Campaigns. This application enables the enterprise to generate email campaigns to groups of users, and to track how users respond to the campaigns.

The list of recipients of an email campaign can created either by uploading lists of email addresses into the Comergent eBusiness System or by specifying selection criteria that are used to select users from the Comergent eBusiness System Knowledgebase.

The campaign message can written in the form of an HTML email message and include hypertext links to Web sites. When recipients of the email click one or more of the links, this event is tracked by the Comergent eBusiness System.

Recipients can choose to unsubscribe from email campaigns and the Comergent eBusiness System records this so that these users do not receive future email messages from *C3* Campaigns.

The Comergent eBusiness System provides reports that present the numbers of recipients of campaigns and how they responded to the campaign: by clicking links or by unsubscribing.

C3 **Configurator**

This release has added worksheets to the Visual Modeler. Worksheets give modelers the ability to manage groups of model properties all at once, thereby

reducing the maintenance burden of models. Worksheets can be maintained in text files and then uploaded to the Comergent eBusiness System when required.

C3 **Invoicing**

There are no changes in this application.

C3 **Leads**

Previous releases did not permit enterprise users to be simultaneously lead administrators and sales managers. In this release, an enterprise user can perform both functions.

This release supports the ability to create proposals as PDF files using templates. The templates are managed by partners, and so each partner can create proposals that present their proposals exactly as they want them to appear.

C3 **Order Manager**

There are no changes in this application.

C3 **Pricing**

There are no changes in this application.

C3 **Product Manager**

There are no changes in this application.

C3 **Profile Manager**

This release has added significant changes to the way in which profile and user administration is done. These are:

- User entitlements are now increasingly managed by access policies. These are defined in the **AccessPolicy.xml** configuration file. See the *Comergent eBusiness System Developer Guide* for more information.

- A new level of managing user capabilities has been introduced called functions. Functions define a bundling of roles, so that assigning a

function to a user is the equivalent of assigning a bundle of roles to a user. The new functions and their relation to roles are described in the *Comergent eBusiness System Administration Guide*.

- Users can be set to be managers or non-managers. Managers can drill down the hierarchy of partner nodes beneath their partner node, and manage the activities of non-managers at these nodes. Managers have visibility into the transactions (quotes, orders, returns, and so on) of the users at and below their node.

- Partners and partner nodes can have credit limits set on them. This provides a mechanism to ensure that partner users can place orders against an account and to manage the value of orders placed on account.

- Enterprise users can be assigned "accounts": these are partners. Assigning an enterprise user to a partner gives them the ability to manage the partner profile and the activities of partner users: typically to create orders for them, to approve requests-for-quotes, and to approve orders that exceed the partner's credit limit.

- Partners and users have statuses that can be used to manage their ability to log in and place orders.

  - Partners can be placed on hold: this has the effect of preventing their users from placing orders. The status of partners is also cascaded downwards to their child partners. Partners can also be closed which effectively shuts down any activity by their partner users.

  - Users can be placed on hold which prevents them from placing order. Users can be closed which prevents them from logging in.

Storefront Enhancements

There are no changes in this application.

C3 Task Manager

Enterprise users can create and manage tasks. These provide a way in which users can create "to do lists", and to pass on tasks to other users. Tasks can be created manually or some tasks are generated by the Comergent eBusiness System in response to an end-user action.

Widgets

There are no changes in this application.

CHAPTER 9

New Features in Release 7.0

This chapter provides an overview of the new features added to the Comergent eBusiness System since Release 6.7.

The following sections describe the features in this release:

- C3 Advisor
- C3 Analyzer
- C3 Catalog
- C3 Campaigns
- C3 Configurator
- C3 Content Manager
- C3 Invoicing
- C3 Leads
- Mobile Configurator
- C3 Order Manager
- C3 Partner Programs
- C3 Pricing
- C3 Product Manager

- C3 Profile Manager

- Storefront Enhancements

- C3 Task Manager

- Widgets

C3 **Advisor**

There are no changes in this application.

C3 **Analyzer**

Release 7.0 has removed the distinction between direct and indirect commerce partners. Consequently, the indirect commerce reports have been made obsolete and removed from the Comergent eBusiness System.

The inventory report has been updated to reflect the use of the Comergent eBusiness System to maintain availability information for both the enterprise partner and its supplier partners.

C3 **Catalog**

Catalog Display

In earlier releases, the product catalog was displayed to end-users using the same set of JSP pages for all product categories. In Release 7.0, you can specify how each product category should be displayed so that different categories can be displayed in different ways.

Product categories can inherit their look-and-feel from their parent categories, or you can specify a unique look-and-feel for one or more product categories. You can specify different display styles depending on the partner level of the partner to whom a user belongs. Category-specific parameters can also be defined so that, for example, a particular category can use a special background image or display products in a distinctive way.

Catalog and Search Navigation

In Release 7.0, the way in which end-users navigate the product catalog has been enhanced by integrating the browsing and search capabilities into a common experience: search is available from all catalog pages, and once an end-user has

performed a search, then their browsing uses the results of the search to limit the products they see as they continue browsing.

Entitlements and Suppliers

As end-users browse the product catalog, the prices that they see now take into account supplier-owned entitlements and price lists. Consequently, prices are displayed as price ranges if more than one supplier can supply a product.

When an inquiry list contains products supplied by different supplier partners, then at the point that the inquiry list is turned into an order, the order is "brokered" into separate orders based on grouping the products supplied by each supplier. Different order header information can be entered for each brokered order.

C3 Campaigns

There are no changes in this application.

C3 Configurator

This release has added worksheets to the Visual Modeler. Worksheets give modelers the ability to manage groups of model properties all at once, thereby reducing the maintenance burden of models. Worksheets can be maintained in text files and then uploaded to the Comergent eBusiness System when required.

Additionally, enhancements have been made in the following areas:

- Constraint resolution: end-users can be helped to resolve conflicts between option item selections so that they can more easily configure a product correctly

- Copy and moving rules

- Rule firing sequences

- String and Numeric Property Editor windows

- Formulas for numeric and string properties

- New UI controls for the tabular display of option classes and items

- Re-organization of UI to speed moving from one part of a model to another

- Reporting has been enhanced to provide more information about models and their use

- Testing models: before publishing models you can test the models to see how they will be displayed on specific dates and to users of different partners.

C3 Content Manager

C3 Content Manager has been upgraded to work with Docushare 4.0.

C3 Invoicing

The following changes have been made to *C3* Invoicing:

- Invoice creation: invoices can now be created when OrderShipmentUpdateRequest messages are posted into the Comergent eBusiness System. When an OrderShipmentUpdateRequest messages is received, an element in the message determines whether an invoice is created.

- Credit and Debit memos: enterprise users can adjust invoices by issuing credit and debit memos.

C3 Leads

The relationship between leads, proposals, and quotes has been re-organized. This means that proposals can now be placed directly as orders or saved as quotes.

A partner sales executive can create proposals and opportunities without having them passed from the enterprise. An enterprise customer service representative can transfer ownership of a proposal from an unknown contact to an existing customer or partner user so that the proposal can be converted to an order.

Mobile Configurator

A new release of the Mobile Configurator is available with Release 7.0. Its new features include:

- Supplier pricing: as you configure models with the Mobile Configurator, the prices that are displayed are the prices that you maintain as a supplier in the online Comergent eBusiness System. This ensures that the prices displayed to the customers are prices that you manage.

- Data Synchronization: you can automatically synchronize the models and prices used by Mobile Configurator so that the prices and features displayed are always up-to-date.

- Updates: If changes are made to the Mobile Configurator, then these can be automatically pushed to the users of the Mobile Configurator in the field.

C3 Order Manager

The following changes have been made to *C3* Order Manager:

- Payment Processing

- Suppliers

- UI Changes

- Creating Orders

- Quotes and Request For Quotes

- Sales Contracts

Payment Processing

Release 7.0 supports credit card payment processing through payment gateways such as CyberSource. This includes: credit card authorization, settlements, support for security codes, and account credits. In addition, a UI is provided to review the credit card transactions to track usage and ordering patterns.

Suppliers

Release 7.0 makes a significant change to the way in which products are brokered to different supplier partners. The ordering process has been re-organized so that when a customer is building an inquiry list, they are prompted to select suppliers for each of the products in the list (if more than one supplier can supply a product to them).

The choice of suppliers is determined by which supplier-owned price lists have each product ID on them. If a supplier maintains their prices for products remotely, then an "*" denotes that as customers browse the product catalog, and then up-to-date prices are retrieved in real-time as the customer creates their order.

The selection of suppliers now controls the order-brokering algorithm and so end-users can provide different header information for different suppliers.

UI Changes

Significant changes have been made to the look-and-feel of the end-user facing pages of the Comergent eBusiness System. The changes make much greater use of cascading style sheets (CSS) and CIC tags. These make for a more uniform look-and-feel across the Comergent eBusiness System applications as well making the UI more customizable.

Creating Orders

Enterprise users, in particular customer service representatives, can now change the ownership of inquiry lists from one user to another user that belongs either to the same partner or to another partner. This means that they can create an inquiry list on behalf of a generic customer and then assign ownership of the inquiry list to different user once their user profile has been created or when the user identifies themselves as a pre-existing user on the Comergent eBusiness System. In particular, CSRs can create an inquiry list for a user before they have provided any identifying information, and then can re-assign the list once a user profile for the user has been created.

Lists created in this way reflect the prices available to the current owner of the inquiry list and so may change as the ownership is changed.

Quotes and Request For Quotes

Release 7.0 has merged the business objects known as quotes and request for quotes (RFQs). Inquiry lists can be saved as orderable quotes: these are quotes which can be immediately turned into orders. Users can request special pricing on the quote by clicking a Negotiate Price button. The special pricing request can be accepted (in which case it becomes an orderable quote) or rejected (in which case, the user can resubmit the quote request with modified prices). References to RFQs in the UI have been removed: these objects are now consistently referred to as a quotes.

Sales Contracts

Release 7.0 has introduced a new capability to manage prices for your partners: sales contracts. You can create a sales contract that specifies that a particular partner can buy a specified quantity of specified products at negotiated contract prices. The sales contract determines shipping and payment terms, and has start and end dates.

When your partners place orders using their sales contracts, then the quantities they buy are tracked to ensure that they do not exceed the contractually-agreed

quantities. The Comergent eBusiness System can be used to report on contract compliance and calculate post-contract rebates or penalties.

C3 Partner Programs

Release 7.0 introduces a new application, *C3* Partner Programs. This application enables you to create different types of partner marketing and sales programs. Approval and claims forms for MDF and Co-op programs are included out-of-the-box in Release 7.0. You can use the Visual Modeler to flexibly create and manage forms for different types of partner programs for MDF and Co-op programs. You can create separate programs and associated activities and assign them to partners based on partner attributes (partner type, geography, and so on).

As well as managing the programs themselves, you can also manage partner account balances (financial or points based) that you set up for your partners. For example, you can choose how to allocate MDF and Co-op payments to different marketing fund accounts.

C3 Pricing

Earlier releases of the Comergent eBusiness System enabled partner administrators to create price lists and add products to them. These price lists were used to present supplier-specific prices to customers, but the splitting of orders was based on the supplier ID associated with each product.

Release 7.0 now uses supplier-owned price lists to manage which partners can supply products, and how an order is split up (brokered) between suppliers. When more than one supplier supplies a product, then customers can choose between them as part of the ordering process. You can specify which supplier owns each line item of a price list, and so manage multiple suppliers for a product on a single price list.

Partners can maintain their price lists on the local Comergent eBusiness System using the same UI as enterprise administrators. Alternatively, partners can maintain their prices remotely using a separate system (a Comergent eBusiness System or otherwise), and their prices for products can be retrieved in real-time as the customer creates their orders.

C3 Product Manager

The following changes have been made to *C3* Product Manager:

- Product Entitlements
- Catalog Display
- Catalog and Search Navigation
- Product Availability
- SKU Management

Product Entitlements

In earlier releases, price lists determined both whether end-users could see products and the prices that they saw as they browsed the product catalog and placed orders. In Release 7.0, these have been separated so that the management of access to products is managed through *entitlements*.

Enterprise and partner administrators create entitlements to specify which products should be included and excluded in what an end-user can see as they browse the product catalog. Conceptually, an entitlement is managed in the same way as a price list: it comprises a list of products and by assigning the entitlement to a partner, you determine that users belonging to this partner can see the included products and not see the excluded products.

To reduce the administrative burden, rather than having to explicitly list products in an entitlement, you can specify an entitlement using product metadata such as the assignment of a feature or its membership of a product category. In this way, you can include or exclude a set of products and have this updated automatically as new products are assigned to a product category or are assigned a feature.

Entitlements may be inherited in the same way as price lists. Using inheritance you can manage product entitlements across multiple nodes of a partner hierarchy and include and exclude products at any level in the hierarchy.

Product Availability

In earlier releases, storefront administrators could maintain availability information (inventory, warehouse locations, restock quantities and dates) for their storefronts, but enterprise administrators could not. In Release 7.0, enterprise administrators can maintain availability information, either through file uploads or by updating individual availability records.

SKU Management

This release of the Comergent eBusiness System provides improved support for managing the relationship between your product IDs and the partner numbers and SKUs of your manufacturer partners. You can specify which combination of

manufacturer name and SKU correspond to one of your product IDs, and you can also describe how your product IDs map to the product IDs of your supplier partners.

C3 Profile Manager

This release has added significant changes to the way in which profile and user administration is done. These are:

- The distinction between direct and indirect commerce partners has been removed.

- Price list administration is open to all partner administrators.

- You can manage MDF and Co-op payment accounts for each partner.

Storefront Enhancements

There are no changes in this application.

C3 Task Manager

There are no changes in this application.

Web Services

Release 7.0 supports a rich set of APIs through industry-standard Web services. These include basic e-commerce capabilities such as creating orders and users as well as updating the product catalog and partner profiles. Developers will be able to develop their client applications using classes that are automatically generated from the public WSDL files.

Widgets

There are no changes in this application.

CHAPTER 10 *New Features in Release 7.1*

This chapter provides an overview of the new features added to the Comergent eBusiness System since Release 7.0.2.

The following sections describe the features in this release:

- C3 Advisor

- C3 Analyzer

- C3 Catalog

- C3 Campaigns

- C3 Configurator

- C3 Content Manager

- C3 Invoicing

- C3 Leads

- Mobile Configurator

- C3 Order Manager

- C3 Partner Programs

- C3 Pricing

- C3 Product Manager

- C3 Profile Manager

- Security

- C3 Task Manager

- Widgets

C3 **Advisor**

There are no changes in this application.

C3 **Analyzer**

Release 7.1 has updated the available reports so that they respect the new storefronts architecture.

C3 **Catalog**

Catalog Display

The catalog and product detail pages are re-designed for Release 7.1.

Catalog page updates include:

- Optional, pre-defined, configurable merchandising areas for promotions, deployed as promotion widgets

- Users can browse product categories and sub-categories in the Browse Categories panel

- Users can optionally narrow their product searches by clicking the Expand or Collapse button in the product categories panel

Product detail page updates include:

- The page is organized to highlight product images and key information such as availability

- There is now a quantity entry box and configure button

- There is now an area for adding key product data in HTML

- You can display alternative and complementary products using related product widgets. Competitive products can also be displayed to internal users.

- Additional product data is organized into tabs as follows:

  - Overview: basic product information.

  - Specifications: displays all features assigned to the product.

  - Reviews: end-user reviews of the product. Users may also write their own reviews of products. Anyone can read product reviews, but only registered users can create reviews. Administrators manage review content and can remove inappropriate reviews.

  - Complementary Items: Related products (see "C3 Product Manager" on page 97 for more information).

  - More Info: Displays products superseded by this product.

  - Depending on the product type selected, the following tabs are also available:

    - Components displays the components of a product of type "assembly"

    - Configuration displays configuration options for products of type "configurable." If a product has been pre-configured, the pre-selected options are shown on the Configuration tab.

    - Variations displays the child products of products of type "aggregated".

- The product selection and pricing in the catalog, as well as the look-and-feel of the product catalog navigation, can now be managed using storefront skins. See "C3 Profile Manager" on page 98 for more information.

- End-users can make use of a "sticky cart": that is, a cart that is persistent from when a user visits your site to when they next visit, whether or not they log in.

Catalog and Search Navigation

The underlying Search framework has been updated to enhance performance and usability. See "C3 Product Manager" on page 97 for more information.

Entitlements and Suppliers

End-users now see products as managed by administrators of their particular storefront.

C3 Campaigns

There are no changes in this application.

C3 Configurator

There are no changes in this application.

C3 Content Manager

C3 Content Manager is no longer supported in this release.

C3 Invoicing

There are no changes in this application.

C3 Leads

There are no changes in this application.

Mobile Configurator

There are no changes in this application.

C3 Order Manager

Single and Multiple Carts

Storefront administrators can set the default cart mode to single or multiple by setting user preferences. The user can override the default setting if necessary. See "User Preferences" on page 99 for more information.

Wish Lists

Single cart users can set up and manage wish lists. Each user has a default wish list into which they can place favorite products.

Cart Views

Users can choose either a simple cart view or advanced cart view by setting their Shopping Cart Display preference on the Preferences page, available from their User Detail page.

The simple view displays a straight-forward screen that shows only the contents of a cart. The advanced view provides tools to search for or add products to their cart and get additional product information. Storefront administrators can set the default shopping cart display. The user can override the default setting if necessary. See "User Preferences" on page 99 for more information.

"Sticky" Anonymous User Carts

Prior to Release 7.1, users could shop anonymously and put items in the shopping cart, but if they left the site before logging in, the items in the cart were lost. In Release 7.1 you can remember anonymous carts via a cookie, and present the remembered cart the next time that the user accesses the site.

C3 Partner Programs

There are no changes in this application.

C3 Pricing

There are no changes in this application.

C3 Product Manager

The following changes have been made to *C3* Product Manager:

• Related Products

• Product Availability

• Catalog and Search Navigation

• Product Availability

• SKU Management

Related Products

In this release there are different types of related products as follows:

- Complimentary: when an end-user views a product detail page, then these products are displayed on the Complimentary items tab.

- Alternate: when an end-user view a product detail page, then these products are displayed in a list under the Alternative Selections heading.

- Competitive: this type of related product is not displayed through the out-of-the-box UI, but the information can be used to track competitive products for product managers.

- Related Categories: these are displayed to end-users as they navigate the product catalog to help them quickly access products in related categories.

These are displayed to end -users as described in "C3 Catalog" on page 94.

Product Availability

Enterprise and storefront administrators can maintain availability information for products.

SKU Management

Enterprise and storefront administrators can maintain SKU information for their products.

C3 Profile Manager

Storefronts

This release of the Comergent eBusiness System introduces a new framework within which fully functional e-commerce storefronts can be created.

Storefront administrators can now manage their storefront world with almost all of the same functionality as enterprise administrators. They can manage their customers and partners, price lists, promotions, orders, access customer service functions, and so on just as enterprise administrators can. Storefront product data can be shared with the enterprise product catalog and orders placed at the enterprise can be brokered from the enterprise to child storefronts.

Storefront administrators can manage the look-and-feel of their storefront using skins. A skin defines its look-and-feel using a Cascading Style Sheet (CSS) file. By creating different skins, a storefront administrator can provide different look-and-feel experiences for different users.

User Preferences

Administrators and end-users can manage user preferences from the User Preferences page, accessed by clicking the Preferences tab on the User Detail page. Preference settings include:

- User Cart Mode: single or multiple

  Users may have one or more carts. Multiple carts facilitate creating templates for frequently-placed orders or other special purposes. Administrators set the default cart mode, and end-users can override the default if necessary.

- Shopping Cart Display: simple or advanced

  Simple cart display is meant for novice end-users who do not need to manage multiple carts or perform searches across carts. Advanced cart display provides tools for end-users who are managing multiple carts and need to be able to search across carts, get more product information, and so on.

- Checkout Type: single or multiple step

  Single-step checkout is the most efficient checkout method. Multiple-step checkout is meant to ease the checkout process for novice end-users. Administrators can set the default checkout type, and end-users can override the default if necessary.

- Home Page View: catalog or portal

  Catalog home page view presents the end-user with product catalog entries and promotional items. Portal home page view is the "traditional" Comergent eBusiness System home page, presenting transactions and other information relevant to the user. Administrators can set the default home page view, and end-users can override the default if necessary.

- Sold-To Address: whether or not to display the Sold-To Address

- Availability: whether or not to display item availability information in the Cart Detail page

- Delivery Date: whether or not to display the product delivery date

- Taxable: whether or not to display the Taxable check-box on the Payment Information page

- Availability Text Display: choose what kind of availability information to display, such as number available and lead time only

Security

This section lists security policy enhancements made to support Personal Credit Information (PCI) standards in Release 7.1:

- User and authentication data is now managed separately. Authentication data is managed at the platform level rather than in the application; the Commerce User table no longer contains any authentication data.

- Password policies are controlled and specified through a configuration file, PassowrdPolicies.xml. Policy parameters can be modified, and new policies can be added.

- Administrators can configure security policies such as:

  - The system sets the user password and e-mails it to the user, or the user specifies their password

  - Set the maximum number of login attempts before locking the user out

  - Set minimum and maximum password lengths

  - Set whether or not to perform checks for strings that cannot be used for passwords.

  - Set password reuse policies: whether to allow users to reuse previously-set passwords or require that when users change their passwords, they choose entirely different ones

  - Set password expirations

  - Set whether or not to force alphanumeric passwords

User creation and authentication policy checks are performed when:

- A new user is created

- User authentication information changes

- A user logs in

C3 Task Manager

There are no changes in this application.

Web Services

There are no changes in this application.

Widgets

When a user selects the single cart user preference, the "Active" widget is renamed the "Wish Lists" widget.

New Features in Release 7.2

This chapter provides an overview of the new features added to the Comergent eBusiness System since Release 7.1.

The following sections describe the features in this release:

- C3 Advisor
- C3 Analyzer
- C3 Catalog
- C3 Campaigns
- C3 Configurator
- C3 Invoicing
- C3 Leads
- Mobile Configurator
- C3 Order Manager
- C3 Partner Programs
- C3 Pricing
- C3 Product Manager
- C3 Profile Manager

- Security
- C3 Task Manager
- Widgets

C3 **Advisor**

There are no changes in this application.

C3 **Analyzer**

There are no changes in this application.

C3 **Catalog**

There are no changes in this application.

C3 **Campaigns**

There are no changes in this application.

C3 **Configurator**

Service Contracts

C3 Configurator supports configuring service products, duration-based goods that are generally associated with service contracts. Duration-based goods include cable services, warranties, cell phone plans, and software licenses and are often associated with auxiliary price types such as a monthly service charge, activation fee, overage charge, and so on.

Service products are set up in the Product Manager and Visual Modeler. The modeler creates a product that includes at least one service contractible item (a product or product component is marked as a service item). The modeler creates a maintenance model for the service product in the Visual Modeler and associates the product with that maintenance model. The service product may also be associated with a selling model, which determines what the user will see when they view the product in the catalog.

Service products must be associated with a maintenance model because the maintenance model enables generation of the service contract and allows tracking and management of the contract over time.

See the *Comergent eBusiness System Administration Guide* for details.

C3 Invoicing

There are no changes in this application.

C3 Leads

There are no changes in this application.

Mobile Configurator

There are no changes in this application.

C3 Order Manager

There are no changes in this application.

C3 Partner Programs

There are no changes in this application.

C3 Pricing

Release 7.2 supports auxiliary price types, which were introduced as part of the 7.1-SCa (Service Contracts) release. All products have a one-time price that the customer pays when the product is ordered or shipped. There may be additional, or auxiliary, prices as well, such as a monthly service fee, activation fee for a cell phone plan, cancellation or late fees, and so on. You can define auxiliary price types as part of system implementation (recommended) or they can be added to an existing implementation. See the *Comergent eBusiness System Implementation Guide*'s chapter Customizing *C3* Pricing for more information.

C3 Product Manager

The following features are supported in Release 7.2:

* Creating service products.

  This feature was introduced as part of the 7.1-SCa (Service Contracts) release. To create a new product as a service product, click the Service Item checkbox in the Product Manager's New Product tab. You then enter a Maintenance model to associate with the service product, which allows tracking and maintenance of the service contract associated with the product. See the *Comergent eBusiness System Administration Guide*'s Product Administration chapter for more information.

* Assigning prices to products and products to pricelists from the Product Manager.

  The Product Manager has a new tab, the **Prices** tab, from which you can assign prices to products and products to price lists. See the *Comergent eBusiness System Administration Guide*'s Product Administration chapter for more information.

C3 Profile Manager

There are no changes in this application.

Reporting Database

Release 7.2 supports the Reporting database, introduced in Release 7.1.1. The Reporting database provides the ability to generate reports on your data using a de-normalized database. Data is transferred from the Comergent eBusiness System Transactional (production) knowledgebase to a de-normalized Reporting database schema, which simplifies finding and extracting data for reports and enhances performance. The Reporting database provides methods for transferring data to the de-normalized Reporting database, and for synchronizing the Reporting database with the Transactional knowledgebase.

See the *Comergent eBusiness System Implementation Guide*'s Implementing Reporting chapter for details.

Security

There are no changes in this application.

C3 Task Manager

There are no changes in this application.

Web Services

The following new web services are supported in Release 7.2:

• ServiceContractSearch

• ServiceContractGet

You can access the Service Contract Management WSDL at:

```
http://<server:port>/Comergent/dXML/5.0/
GetWSDL.jsp?sfName=matrix^&fileName=ServiceContractInterface.wsdl
```

Widgets

This release supports customizing the widgets that non-administrator and non-Customer Service Representative users see on their home page when they log in to your e-commece web site. By default, such users see all home page widgets, such as the Orders, Quotes, Returns, Tasks, Contracts, and Invoices widgets, when they log in to your e-commerce Web site. Customer Service Representatives and administrators see only the Tasks widget when they log in. If you want your administrators and Customer Service Representatives to see other widgets as well, use the SDK to customize the **WEB-INF/web/en/US/enterpriseMgr/home/HomeData.jsp** page. See the *Comergent eBusiness System Developer Guide*'s Customization Examples chapter for details.

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