

Sterling Multi-Channel Selling Solution

Tutorial Guide

Release 8.0

Sterling Commerce
An IBM Company

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Preface

Welcome to the Sterling Multi-Channel Selling Solution. This Tutorial Guide and the associated documentation provides all the information required for you to manage the Sterling Multi-Channel Selling Solution at your site.

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

Audience

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

Contents

<i>STERLING COMMERCE SOFTWARE</i>	ii
<i>Third Party Software and other Material</i>	ii
<i>THE APACHE SOFTWARE FOUNDATION SOFTWARE</i>	iii
<i>BEANSHELL SOFTWARE</i>	iii
<i>CYBERSOURCE SOFTWARE</i>	iv
<i>EHCACHE SOFTWARE AND JINI SOFTWARE</i>	iv
<i>GETOPT SOFTWARE AND HTTPCLIENT SOFTWARE</i>	v
<i>JUNIT SOFTWARE</i>	v
<i>SUN MICROSYSTEMS</i>	v
<i>WARRANTY DISCLAIMER</i>	vi
What this Guide Contains	2
<i>LESSON 1, "Enterprise Users and Their Functions"</i>	2
<i>LESSON 2, "Creating Simple Products"</i>	2
<i>LESSON 3, "Setting Prices for Products"</i>	2
<i>LESSON 4, "Creating Partners, Partner Administrators, and Partner Users"</i>	2
<i>LESSON 5, "Bringing Partners and Products Together"</i>	2
<i>LESSON 6, "Creating Product Models"</i>	3
<i>LESSON 7, "Creating Wish Lists, Templates, and Registries"</i>	3
<i>LESSON 8, "The End User Experience"</i>	3
Requirements for Running This Tutorial	3
What You Need to Know	4

LESSON 1 Enterprise Users and Their Functions..... 5

Creating an Enterprise User	5
Assigning Additional Functions.....	11
Creating Additional Enterprise Users	13
Exercises	17

LESSON 2 Creating Simple Products..... 19

Creating Product Categories	19
Creating Nested Categories.....	24
Exercises	28
Creating The Desktop Products	29
Exercises	36
Creating the Workstation Products.....	37
Generating a Product Index.....	42

LESSON 3 Setting Prices for Products..... 43

Creating a Price List for a Category of Products	43
Creating a Price List for Selected Products	50
Modifying the Enterprise Master List.....	53
Exercises	56

***LESSON 4 Creating Partners, Partner Administrators,
and Partner Users..... 57***

Creating a Partner.....	58
Creating a Partner Administrator	66
Creating the Partner Users	70
Exercises	73
Creating another Partner	77
Creating a Partner Administrator for the Partner	82
Creating the Partner Users for the Partner	84
Assigning Price Lists to System-Generated Partners.....	85

Exercises.....	87
----------------	----

LESSON 5 Bringing Partners and Products Together...91

Browsing the Product Catalog.....	92
Browsing the Product Catalog with Price Lists.....	96
Exercises.....	99

LESSON 6 Creating Product Models..... 101

Create a Configurable Product	102
Create the Model	102
Properties	107
<i>Defining Properties for the MXWS-7700 Model</i>	<i>108</i>
<i>Attaching Properties</i>	<i>111</i>
Rules	113
<i>Creating a Rule.....</i>	<i>115</i>
<i>Using Rules to Control Display of Option Items</i>	<i>117</i>
<i>Creating a Constraint Table</i>	<i>121</i>
UI Controls	123
<i>Display Properties</i>	<i>123</i>
Pre-Pick Guiding Text	123
Ignore in Quote	124
<i>Tabular Displays.....</i>	<i>124</i>
<i>Calculated Property Values</i>	<i>125</i>
<i>User-Entered Values</i>	<i>128</i>
Restricting User Entered Values	130
<i>Images.....</i>	<i>131</i>
<i>Layout Management</i>	<i>132</i>

LESSON 7 Creating Wish Lists, Templates, and Registries..... 137

Creating Wish Lists	137
Exercises.....	142
Creating Templates	143

Exercises	148
Creating Registries	149
Exercises	155
<i>LESSON 8 The End User Experience.....</i>	<i>157</i>
End-User Experience	157

Introduction

The *Sterling Multi-Channel Selling Solution Tutorial Guide* provides a practical, hands-on introduction to administering the Sterling Multi-Channel Selling Solution. You should also review the following manuals for more information about the Sterling Multi-Channel Selling Solution:

- The *Sterling Multi-Channel Selling Solution Overview Guide* provides a high-level understanding of the end-user e-commerce experience using the Sterling Multi-Channel Selling Solution as well as how that end-use experience is achieved.
- The *Sterling Multi-Channel Selling Solution Administration Guide* provides a detailed description of the concepts involved in administering the Sterling Multi-Channel Selling Solution as well as step-by-step descriptions of each task involved.

The *Sterling Multi-Channel Selling Solution Tutorial Guide* starts with a minimally populated Knowledgebase and takes you through administrative tasks from the creation of a product catalog and price lists, to the creation of several partners and their partner users. In the final lesson, you log in as these partner users to experience how all these entities work together to achieve the end-user experience.

What this Guide Contains

This Tutorial Guide concerns a fictional company called **Matrix Products** which makes primarily computer products and accessories. In general, you will be the enterprise administrator for this company and will create the business infrastructure which enables **Matrix Products** to do business in the world. You will create the products and set manufacturer's prices for the products. You will create the partners with whom you do business: the distributors, the resellers, the retailers, and the OEMs. Occasionally, to do some administration, you will become a partner administrator. Occasionally, you will log in as one of the partner users, created by the partner administrators, to participate in the Sterling Multi-Channel Selling Solution end-user experience.

LESSON 1, "Enterprise Users and Their Functions"

In this lesson, you create the enterprise users who can administer the enterprise site. By assigning various roles to the users you create you will see how you can grant access to the various applications within the Sterling Multi-Channel Selling Solution.

LESSON 2, "Creating Simple Products"

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

LESSON 3, "Setting Prices for Products"

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

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

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

LESSON 5, "Bringing Partners and Products Together"

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

price list, how the product catalog is still nothing until the price lists containing the products are assigned to partners.

LESSON 6, "Creating Product Models"

In this lesson, you learn how to create a configurable product. You will first create the product, then create the product model, and then test the product configuration experience.

LESSON 7, "Creating Wish Lists, Templates, and Registries"

In this lesson, you learn how to create wish lists, templates, and registries. You will also learn how to add items to the different lists you have created.

LESSON 8, "The End User Experience"

In this lesson, you experience what your end-users experience based on everything you have done so far. You log in as one of the partner users you created in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users", add a product to a product inquiry list, process the list, then place an order as an end-user does.

Requirements for Running This Tutorial

To run this tutorial, you must do the following:

- Install a non-customized copy of the Sterling Multi-Channel Selling Solution for the specific purpose of running this tutorial.
- Populate the knowledgebase with the minimal data set.

For information about installing the Sterling Multi-Channel Selling Solution and populating the Knowledgebase, refer to the *Sterling Multi-Channel Selling Solution Implementation Guide*.

You must know the URL used to access the Sterling Multi-Channel Selling Solution. The URL is similar to:

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

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

What You Need to Know

This tutorial is designed to give you hands-on experience of the tasks and concepts described in the *Sterling Multi-Channel Selling Solution Administration Guide*. You should read and understand the concepts described in the following chapters in the *Sterling Multi-Channel Selling Solution Administration Guide*:

- Chapter 1, “Introduction”

Read the following sections:

- “Users, Roles, and Functions”
 - “Managing the Sales Channel”
 - “Setting Prices for Products”
- Chapter 2, “Introduction to Product Administration”

Read the first section, “Administering the Product Catalog”.

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

Creating an Enterprise User

1. Point your browser to the URL where the copy of the Sterling Multi-Channel Selling Solution is installed for this tutorial. Determine from your system administrator the correct URL for this tutorial. It will be something like:

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

In a typical, out-of-the-box installation, the browser displays the Matrix home page as shown in Figure 1 on page 6.



FIGURE 1. Matrix Home Page

2. Click the Admins Login Here link, then log in to the Sterling Multi-Channel Selling Solution as the **admin** user (password: **admin**).



FIGURE 2. Logging In as the admin User

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

When you log in as the **admin** user, the Enterprise Home Page appears (Figure 3 on page 7). Each link represents access to a particular part of the Sterling Multi-Channel Selling Solution.

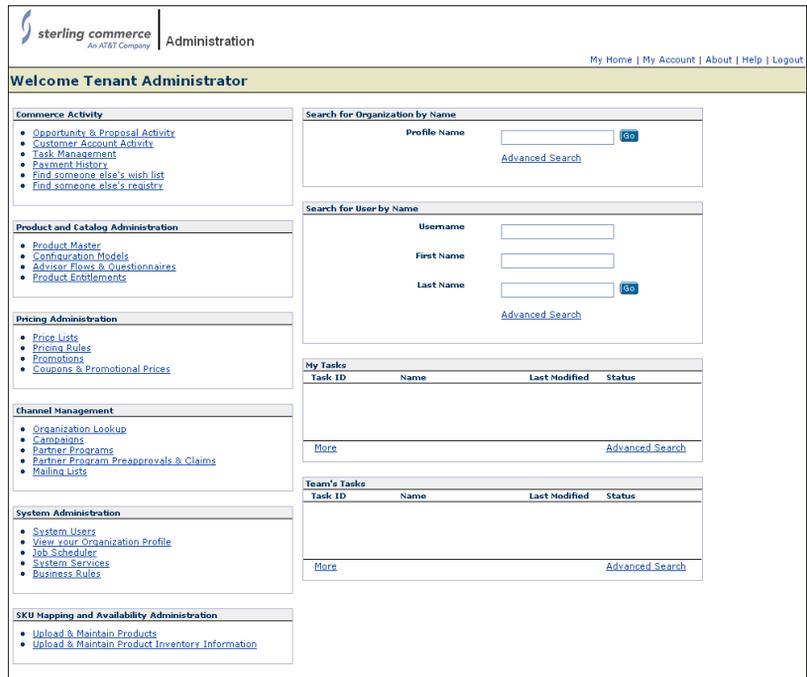


FIGURE 3. Enterprise Home Page as seen by the admin User

3. In the System Administration section, click System Users.

Administration
An AT&T Company

[My Home](#) | [My Account](#) | [About](#) | [Help](#) | [Logout](#)

User List: Matrix Solutions Inc.

Find users that match:

[Show All](#)
[Advanced Search](#)

Matrix Solutions Inc.: All users shown

Username ↴	Full Name	Functions	Manager	Profile	Business Phone	Email Address	
ERPAdmin	ERPAdmin, ERPAdmin		Yes	Matrix Solutions Inc. [*]		ERPAdmin@matrixsolutions.com	Delete
admin	Administrator, Tenant	Profile Administration, Basic Profile Maintenance, Channel Executive, Commerce, Financials, Program Management, Sales, Sales Executive	Yes	Matrix Solutions Inc. [*]		admin@matrixsolutions.com	

[Back to Top](#) ↑
[*] denotes a Storefront

FIGURE 4. User List Page

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

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

FIGURE 5. User Detail Page

- Create a user using the following information:

TABLE 1. User Information

Field	Value
Username	ajones
Password	ajones
First name	Alison
Last name	Jones
Email	ajones@matrix.com
User Functions	<i>Leave all unchecked</i>

sterling commerce Administration

My Home | My Account | About | Help | Logout

Create New User

Info

Belongs To: **Matrix Solutions Inc.**

Cancel Save

NOTE: (*) items are required.

User Information	User Locale	User Functions
<p>Username * ajones</p> <p>Password * *****</p> <p>Confirm Password * *****</p> <p>Title Mr. ▾</p> <p>First name * Allison</p> <p>Last name * Jones</p> <p>Job Title</p> <p>Email * ajones@matrix.com</p> <p>Department name</p> <p>Department description</p> <p>Phones Business ▾ <input type="text"/> <input type="button" value="Add"/></p> <p><input type="text"/> <input type="button" value="Remove"/></p> <p>Away <input type="checkbox"/></p>	<p>Preferred Locale United States ▾</p> <p><small>Notes: changes to Preferred locale will take effect on the next login.</small></p>	<p><input type="checkbox"/> Manager</p> <p>User Type User ▾</p> <p>Functions</p> <p><input type="checkbox"/> Commerce</p> <p><input type="checkbox"/> Sales</p> <p><input type="checkbox"/> Sales Executive</p> <p><input type="checkbox"/> Program Management</p> <p><input type="checkbox"/> Channel Executive</p> <p><input type="checkbox"/> Financials</p> <p><input type="checkbox"/> Lead Administration</p> <p><input type="checkbox"/> Basic Profile Maintenance</p> <p><input type="checkbox"/> Profile Administration</p> <p><input type="checkbox"/> Offline Access</p> <p><input type="checkbox"/> Product Review Administration</p> <p><input type="checkbox"/> Marketing Manager - Segmentation</p> <p><input type="checkbox"/> Marketing Manager - Campaigns</p>

FIGURE 6. User Detail Page

Use **ajones** as both the Username and Password. Notice that no functions are selected. Do not select any functions for the time being. See the *Sterling Multi-Channel Selling Solution Administration Guide* for a description of the other required fields.

6. Click **Save**.
7. Click **Logout**.

8. Click the Admins Login Here link, then log in to the Sterling Multi-Channel Selling Solution as **ajones** (password: **ajones**).

The administration home page appears as in Figure 7 on page 11. Compare this home page with the enterprise home page that appeared when you logged in as the **admin** user (Figure 3 on page 7). For example, notice that you do not have a Team's Tasks panel: this is because ajones is not a manager.

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

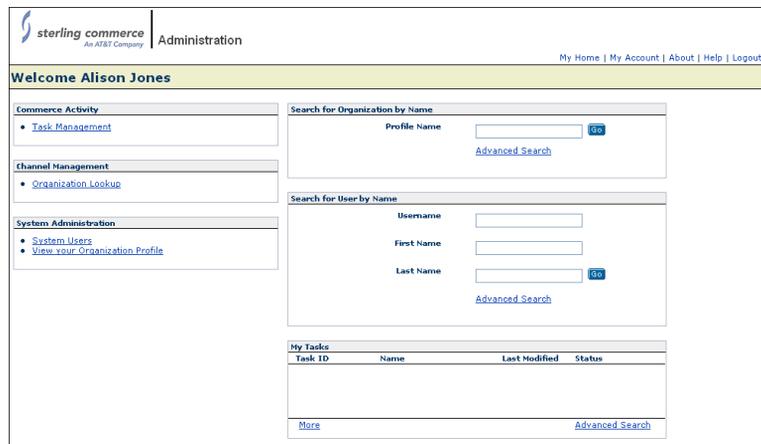


FIGURE 7. Enterprise Home Page as seen by the ajones User

Assigning Additional Functions

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

1. Click **Logout**.
2. Click the Admins Login Here link, then log in again as the **admin** user (password: **admin**).
3. In the System Administration section, click System Users.

4. Click the link for **ajones**.

Check the Manager check box, then give **ajones** the same functions as the **admin** user (Figure 8 on page 12):

- Program Management
- Profile Administration

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

The screenshot shows a web interface titled "User Functions" for a user named "ajones". The user type is "User". Under the "Functions" section, several checkboxes are visible. The "Manager" checkbox is checked. Under the "Maintenance" section, the "Profile Administration" checkbox is checked. Other functions like "Commerce", "Sales", "Sales Executive", "Channel Executive", "Financials", "Lead Administration", "Basic Profile", "Offline Access", "Product Review", "Marketing Manager - Segmentation", and "Marketing Manager - Campaigns" are unchecked.

User Functions	
<input checked="" type="checkbox"/>	Manager
User Type	
User	
Functions	
<input type="checkbox"/>	Commerce
<input type="checkbox"/>	Sales
<input type="checkbox"/>	Sales Executive
<input checked="" type="checkbox"/>	Program Management
<input type="checkbox"/>	Channel Executive
<input type="checkbox"/>	Financials
<input type="checkbox"/>	Lead Administration
<input type="checkbox"/>	Basic Profile
Maintenance	
<input checked="" type="checkbox"/>	Profile Administration
<input type="checkbox"/>	Offline Access
<input type="checkbox"/>	Product Review
Administration	
<input type="checkbox"/>	Marketing Manager - Segmentation
<input type="checkbox"/>	Marketing Manager - Campaigns

FIGURE 8. User Detail Page: Adding Functions

5. Click **Save**.
6. Click **Logout**.

7. Click the Admins Login Here link, then log in again as the **ajones** user (password: **ajones**).

Notice that **ajones** now has access to the same functions as the admin user, including the Team's Tasks panel.

Creating Additional Enterprise Users

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

- Dinah Morris
Dinah Morris monitors orders and returns, so she must have access to the right applications to do these things.
 - Brent Willow
Brent Willow is in charge of modifying business rules.
1. Click System Users.
 2. Click **Create User** to display the detail page.
 3. Enter the information for Dinah Morris:

TABLE 2. Dinah Morris User Information

Field	Value
Username	dmorris
Password	dmorris
First name	Dinah
Last name	Morris
Email	dmorris@matrix.com
Functions	Check Commerce

sterling commerce Administration My Home | My Account | About | Help | Logout

User Detail for Dinah Morris

Info | Addresses | Current Accounts | Assian Accounts | Notes

Belongs To: [Matrix Solutions Inc.](#) [View Users](#) [Save](#)

NOTE: (*) items are required.

<p>User Information</p> <p>Username * dmorris</p> <p>Password * *****</p> <p>Confirm Password * *****</p> <p>Title Ms. ▾</p> <p>First name * Dinah</p> <p>Last name * Morris</p> <p>Job Title <input type="text"/></p> <p>Email * dmorris@matrix.com</p> <p>Department name <input type="text"/></p> <p>Department description <input type="text"/></p> <p>Phones Business ▾ <input type="text"/> Add</p> <p><input type="text"/> Remove</p> <p>Away <input type="checkbox"/></p>	<p>User Locale</p> <p>Preferred Locale United States ▾</p> <p><small>Note: changes to Preferred Locale will take effect on the next login.</small></p>	<p>User Functions</p> <p><input type="checkbox"/> Manager</p> <p>User Type User</p> <p>Functions</p> <p><input checked="" type="checkbox"/> Commerce</p> <p><input type="checkbox"/> Sales</p> <p><input type="checkbox"/> Sales Executive</p> <p><input type="checkbox"/> Program Management</p> <p><input type="checkbox"/> Channel Executive</p> <p><input type="checkbox"/> Financials</p> <p><input type="checkbox"/> Lead Administration</p> <p><input type="checkbox"/> Basic Profile Maintenance</p> <p><input type="checkbox"/> Profile Administration</p> <p><input type="checkbox"/> Offline Access</p> <p><input type="checkbox"/> Product Review Administration</p> <p><input type="checkbox"/> Marketing Manager - Segmentation</p> <p><input type="checkbox"/> Marketing Manager - Campaigns</p>	<p>Status</p> <p><small>Please enter a reason when changing the status.</small></p> <p>Parent Status Open</p> <p>Status Open ▾</p> <p>Comment <input type="text"/></p> <p>User Account Limits</p> <p>Max. Accounts <input type="text"/></p>
--	---	---	---

FIGURE 9. User Detail Page: Dinah Morris

4. Click **Save**.
5. Click **Logout**, then click the Admins Login Here link and log in again as Dinah Morris (username **dmorris**, password: **dmorris**).

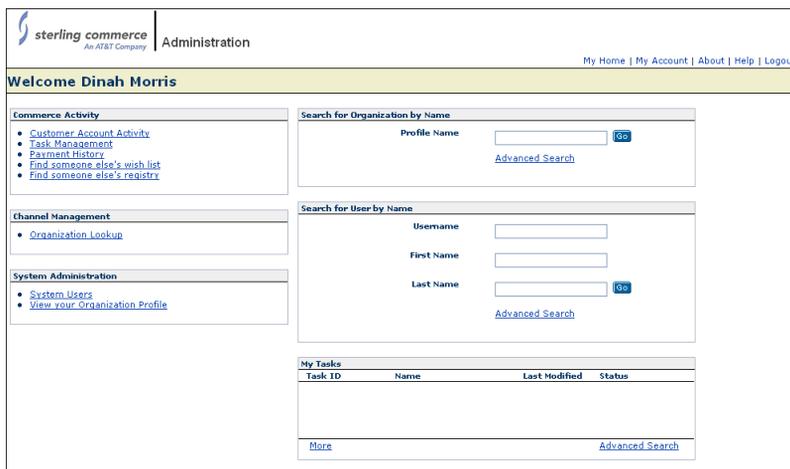


FIGURE 10. Enterprise Home Page as seen by Dinah Morris

Notice that the enterprise home page appears nearly the same as when you logged in as **ajones** with only the User role assigned (Figure 7 on page 11). The difference is that now there are links to two workspaces, and new panels for some basic commerce objects: Orders, Quotes, Returns, and Contracts.

6. Click **Logout**, then click the Admins Login Here link and log in again as Alison Jones (username **ajones**, password: **ajones**).
7. Click System Users.
8. Click **Create User** to display the detail page.
9. Enter the information for Brent Willow:

TABLE 3. Brent Willow User Information

Field	Value
Username	bwillow
Password	bwillow
First Name	Brent
Last Name	Willow
Job Title	Business Rules Manager
Email	bwillow@matrix.com

TABLE 3. Brent Willow User Information

Field	Value
Department name	Information Systems
Department description	Information Systems
Business Phones	(408) 555-1214
Functions	Check Program Management

10. Click the Add button to add Brent’s business phone number, then click **Save**.
11. Click **Logout**, then click the Admins Login Here link and log in again as Brent Willow (username **bwillow**, password: **bwillow**).

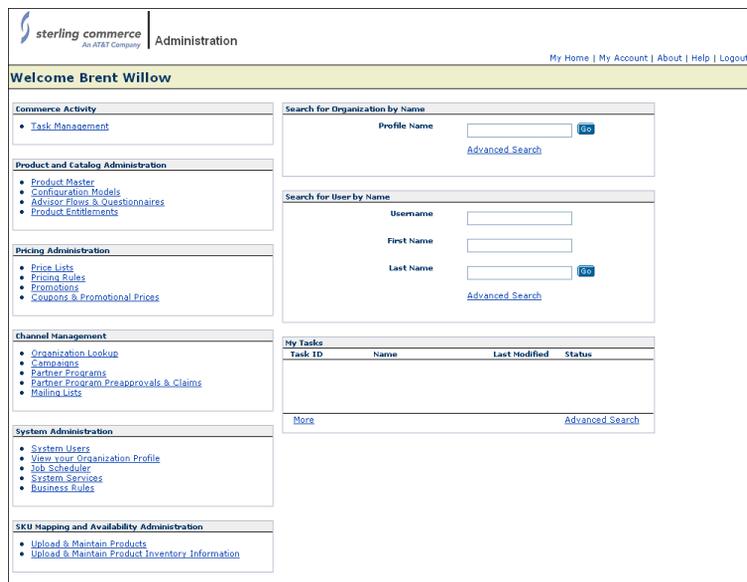


FIGURE 11. Enterprise Home Page as seen by Brent Willow

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

12. Click **Logout**.

Exercises

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

Creating Simple Products

Now that you have created a number of enterprise users with the appropriate functions to perform their tasks, you can begin creating the products that will form the product catalog. For the purposes of the current tutorial, you will create some simple products, then generate a product index to allow users to search your product catalog when they visit your site.

Creating Product Categories

As described in the Sterling Multi-Channel Selling Solution, a product catalog comprises multiple product categories, each of which contains one or more individual products. The first step in creating a product is to find the product category in which you want to locate the product. If the category does not exist, then you must create the category.

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

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

- **Memory**

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

1. Log in to the Sterling Multi-Channel Selling Solution administration page as the **bwillow** user (password: **bwillow**) you created in LESSON 1, "Enterprise Users and Their Functions".

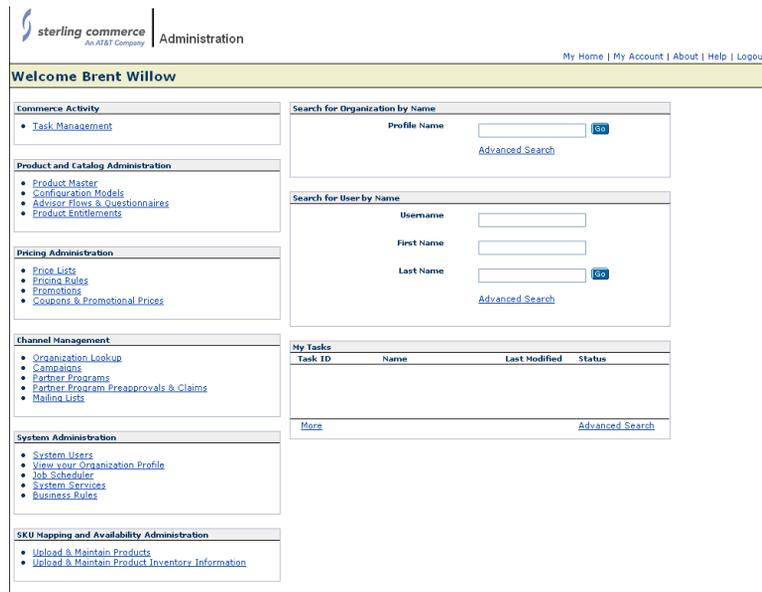


FIGURE 12. Enterprise Home Page

2. Click Product Master in the Product and Catalog Administration panel.

The Product Manager page appears (Figure 13 on page 21), displaying the Product Category tab. You will use this tab to create your product categories.

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

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

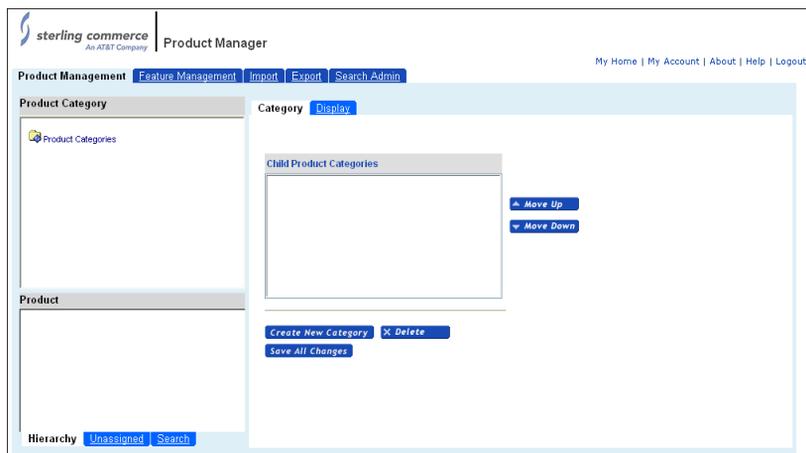


FIGURE 13. Product Manager Page

3. Click **Create New Category**.

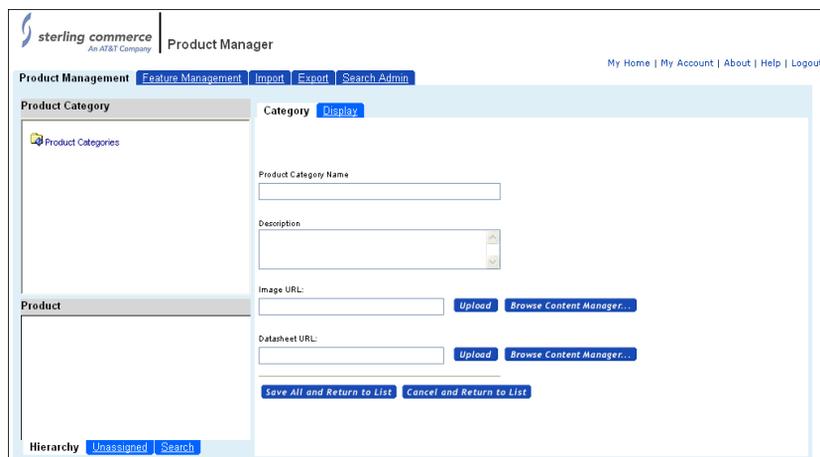


FIGURE 14. Creating a New Category

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

Desktops and workstations for all needs.

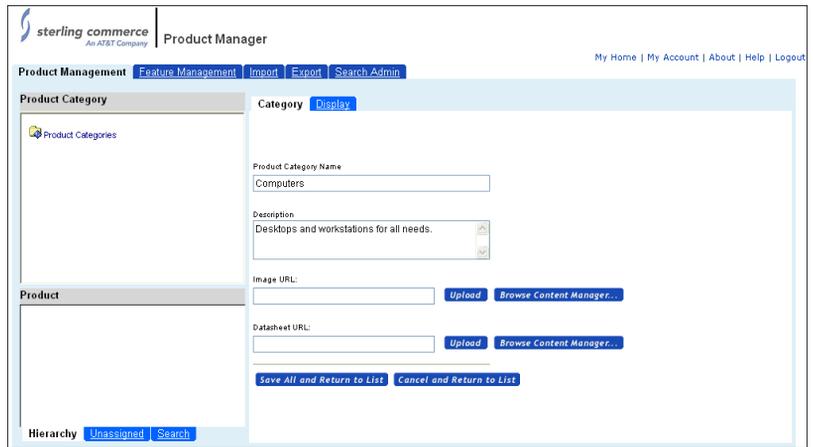


FIGURE 15. Name and Description

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

The **Catalog Management** tab re-displays (Figure 16 on page 22). Notice that the Child Product Categories list box shows a new child category: Computers. In the left-hand Product Category frame, notice also that a new category, Computers, is displayed below the root category.

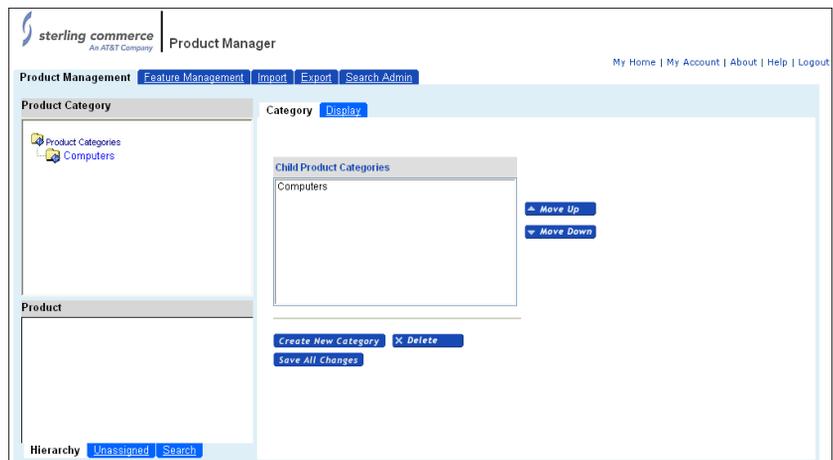


FIGURE 16. New Child Product Category

7. Click **Create New Category**.

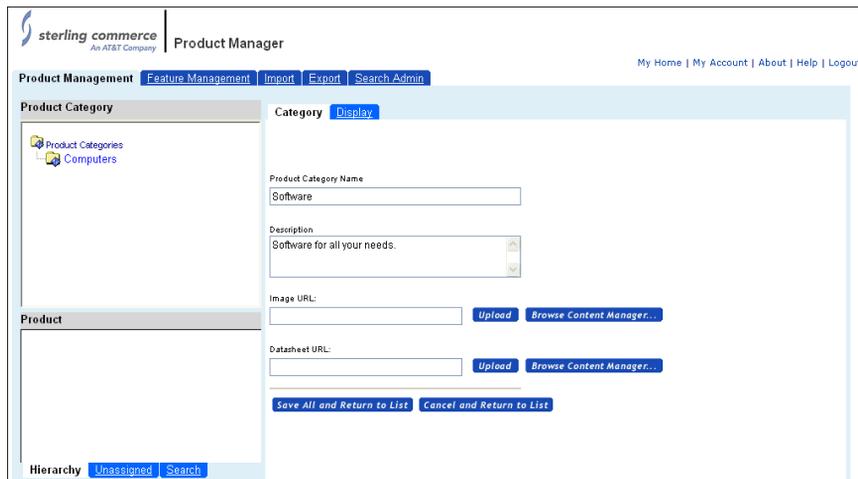


FIGURE 17. Product Management Tab For New Category

8. Enter the name (Software) and a short description, such as:

Software for all your needs.

9. Click **Save all and Return to list**.

The Catalog Management tab re-displays (Figure 18 on page 24) showing a new child (Software) in the Child Product Category list box as well as in the Product Category frame. Notice that, in the Product Category frame, the new category is under the root category.

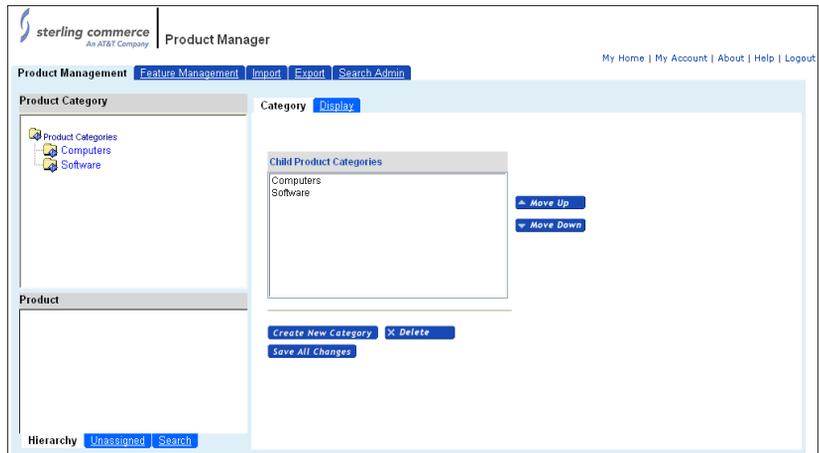


FIGURE 18. Product Management Tab Showing New Category

Creating Nested Categories

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

1. Click the Computers category in the left-hand Product Category frame.

In Figure 19 on page 25, notice how the tabs in the right-hand frame have changed. The General tab displays the name and description you gave to the new category.

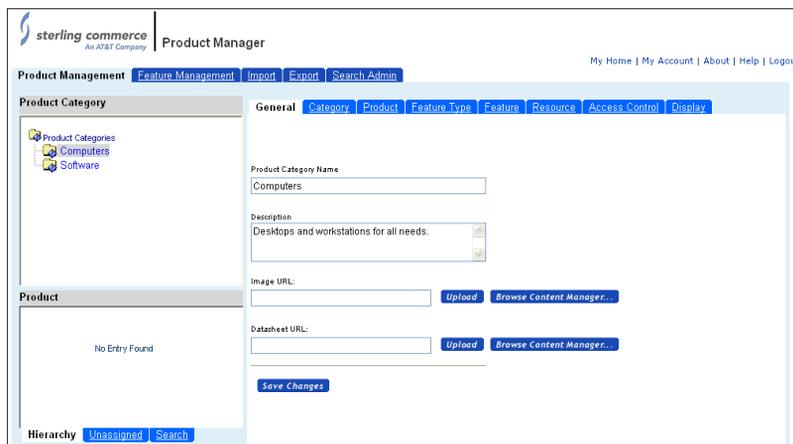


FIGURE 19. Computers Category Selected in the Product Category Frame

2. Click the **Category** tab.

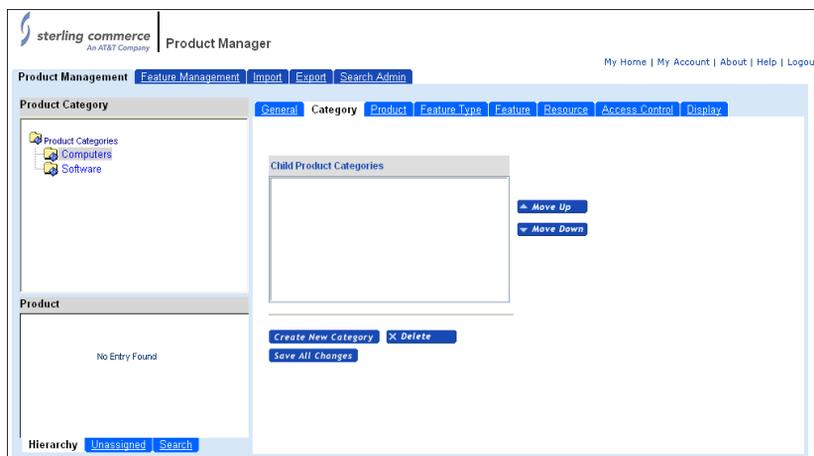


FIGURE 20. Category Tab

This tab resembles the tab displayed for the root category (Figure 14 on page 21). Notice the empty Child Product Categories list box.

3. Click **Create New Category**.

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

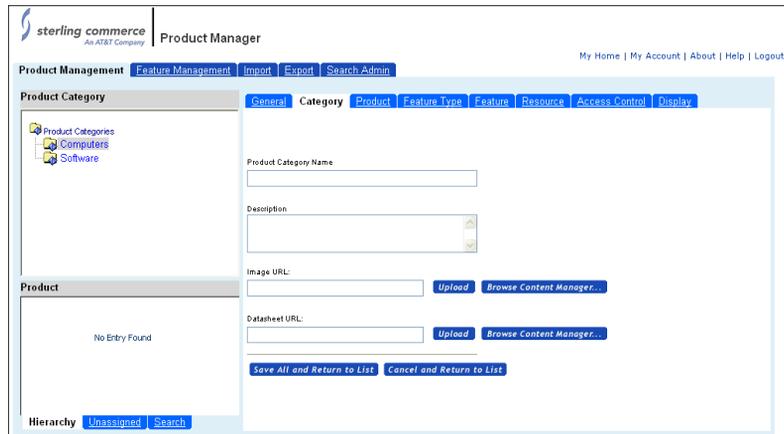


FIGURE 21. Category Tab for a New Category

4. Enter the product category name (Desktops) and a short description.
5. Click **Save All and Return to List**.

The Category tab re-displays (Figure 22 on page 26) showing a child (Desktops) in the Child Product Categories list box. Notice that there is a plus (+) next to the Computers category in the left-hand frame.

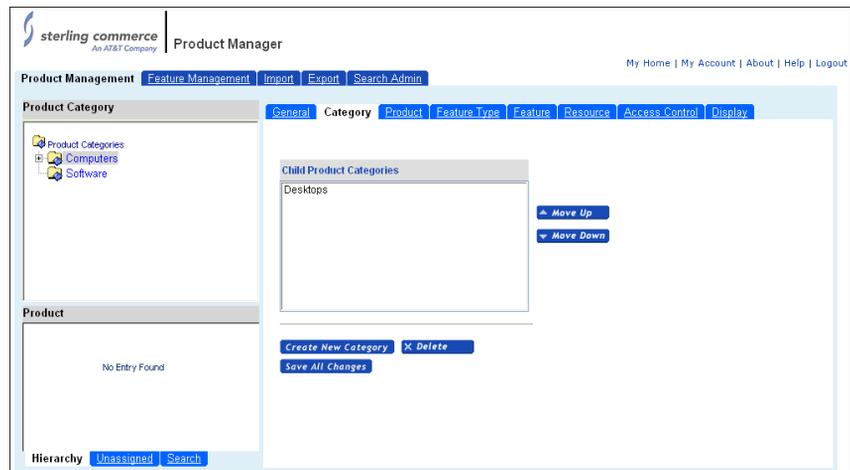


FIGURE 22. Category Tab Showing a New Child Category

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

After you save the new category, the Category tab re-displays. Notice there is a new child (Workstations) in the Child Product Categories list box.

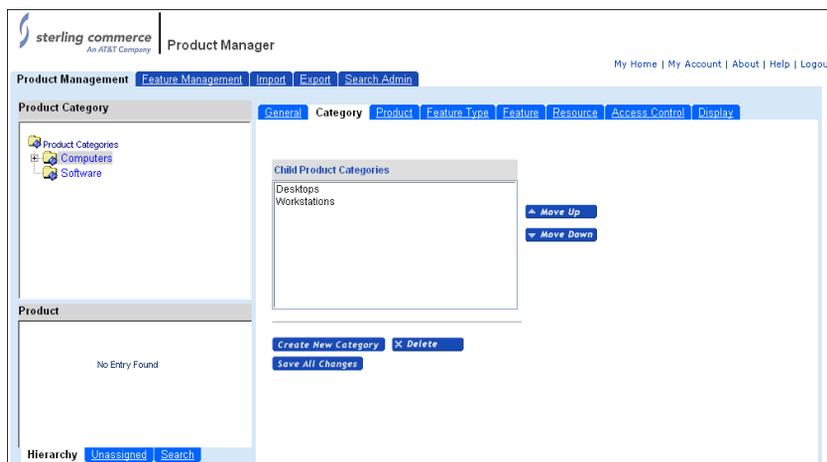


FIGURE 23. Category Tab Showing a New Child Category

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

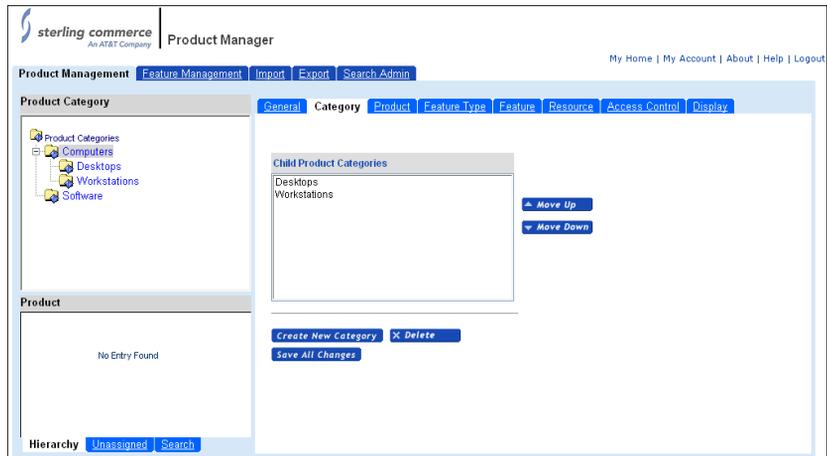


FIGURE 24. Product Category Frame Showing New Nested Categories

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

Exercises

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

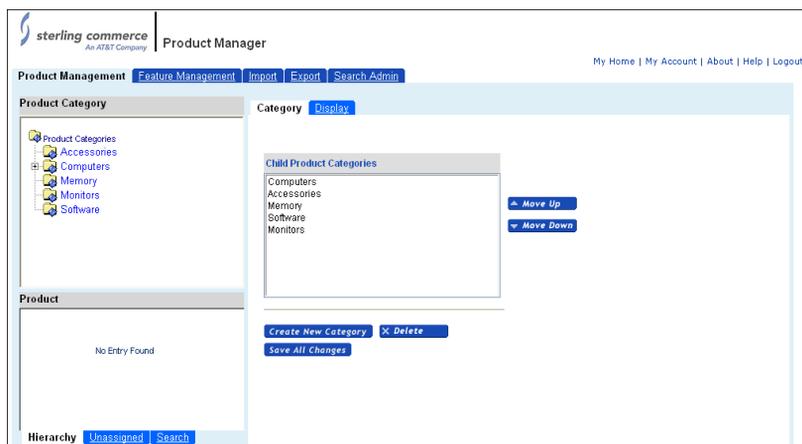


FIGURE 25. Product Management Tab

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

Creating The Desktop Products

After you complete the steps in "Creating Product Categories" on page 19, you will have the product category structure you need for the rest of the lesson. In this section, you will create the products that will populate the Desktops category:

- Matrix7490 Desktop
 - Matrix7510 Desktop
 - Matrix7520 Desktop
 - Matrix7540 Desktop
 - Matrix7600 Desktop
1. Log in to the Sterling Multi-Channel Selling Solution administration page as the bwillow user (password: bwillow) you created in LESSON 1, "Enterprise Users and Their Functions".

2. Click Product Master in the Product and Catalog Administration panel.
The Product Manager page appears, showing the root category, along with the categories you created in the last section.

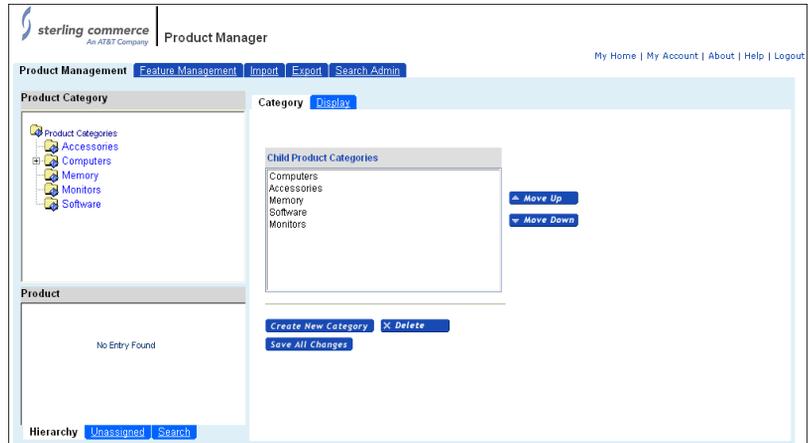


FIGURE 26. Product Management Tab

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

The first product that you create is a desktop computer product, so you create the product within the Desktops category. Recall that Desktops is one of the nested categories you created within the Computers category in "Creating Product Categories" on page 19.

3. In the left-hand Product Category frame, click the node next to Computers to expand its list of categories.
The nested categories Desktops and Workstations appear.
4. In the Product Category frame, click Desktops.
The tabs for the Desktops nested category appear.

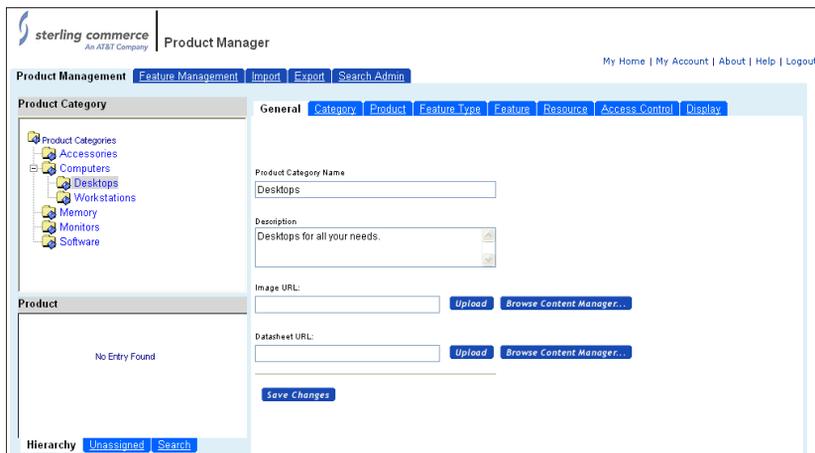


FIGURE 27. Product Management Tab with Tabs for Desktop Category

5. Click the **Product** tab.

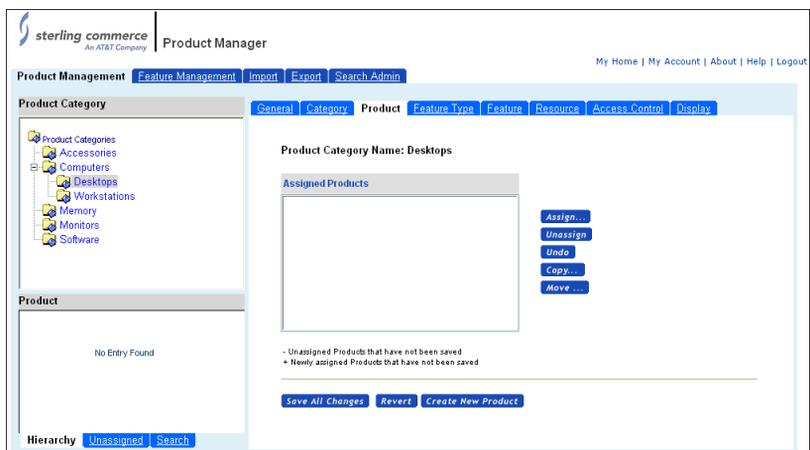


FIGURE 28. Product Management Tab with Product Tab

6. Click **Create New Product**.

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

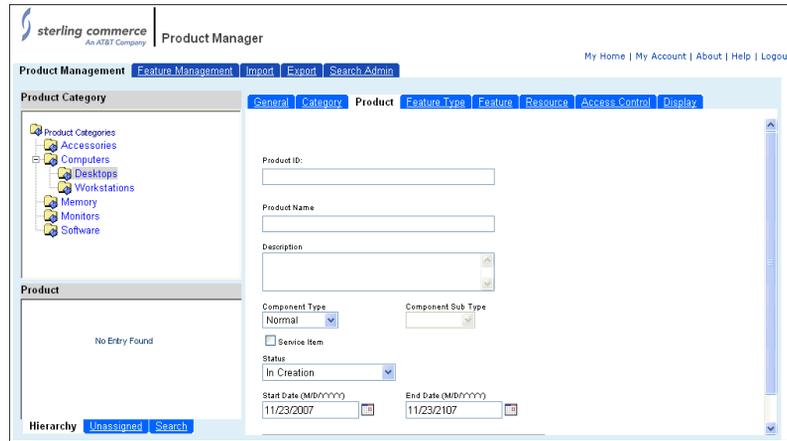


FIGURE 29. Product Tab with New Product Fields

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

TABLE 4. Matrix 7490 Desktop

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

The Product ID, the Product Name, and the Description that you enter here display to end-users when they browse your product catalog. In addition, the Product ID uniquely identifies the product throughout the Sterling Multi-Channel Selling Solution.

8. Select the Component Type as Normal.

The following component types are available:

- Normal
- Configurable
- Assembly

- Aggregated

Normal is the default and is the simplest product you can create.

9. Enter a Start Date (the current date) and an End Date (a date five years from the current date).
10. Select Released from the **Status** drop-down list.
11. Click **Save and Return**.

Notice that the new product, MXDS-7490 Matrix 7490 Desktop, appears in the lower left Product panel, as shown in the following figure.



FIGURE 30. New Product Display in Product Panel

Notice also that the category Desktops is still selected. Click the Product tab to see that the new product is listed as assigned to this category, as shown in the following figure.



FIGURE 31. Product Listed as an Assigned Product

You next modify the new product by adding detailed sales information.

1. In the lower left Product panel, click MXDS-7490. Notice that the tabs in the right hand work area change, as shown in the following figure.

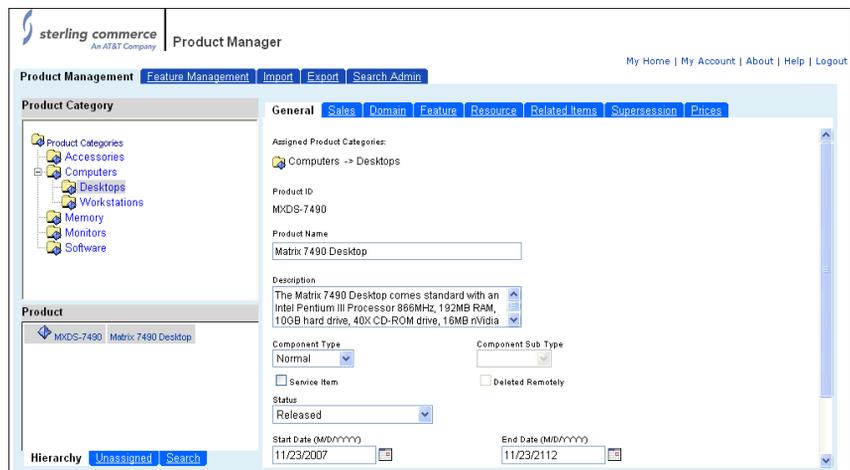


FIGURE 32. New Product Detail Page

2. Click the **Sales** tab.
3. Accept the default values for the Unit of Measure (**EA**, for each), Quantity Per Unit (**1.000000**), and Minimum Order Quantity (1). Enter the Lead Time in days (**30**). Leave the Cannot Be Sold Separately, Not Eligible for In-Store

Pickup, Not Eligible for Shipping Discount, and Not Shippable boxes unchecked.

4. Enter an Image URL (**../images/desktop1.jpg**).

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

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

The Sales detail page now appears as shown in the following figure.

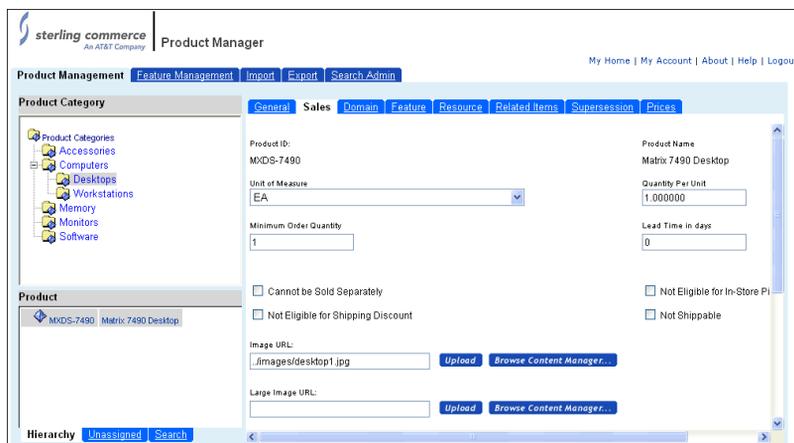


FIGURE 33. Product Frame: Sales Tab

5. Click Save Changes.

6. In the Product Category panel, click Desktops to return to the Desktops category. From here, you can add more products to the Desktops category.

Exercises

- Create the remaining products in the Desktops category. Use the information as shown in Table 5 on page 36.

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

TABLE 5. Products to be Created

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

TABLE 5. Products to be Created (Continued)

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

When you complete this exercise, the Product frame for the Desktops category appears as shown in the following figure.

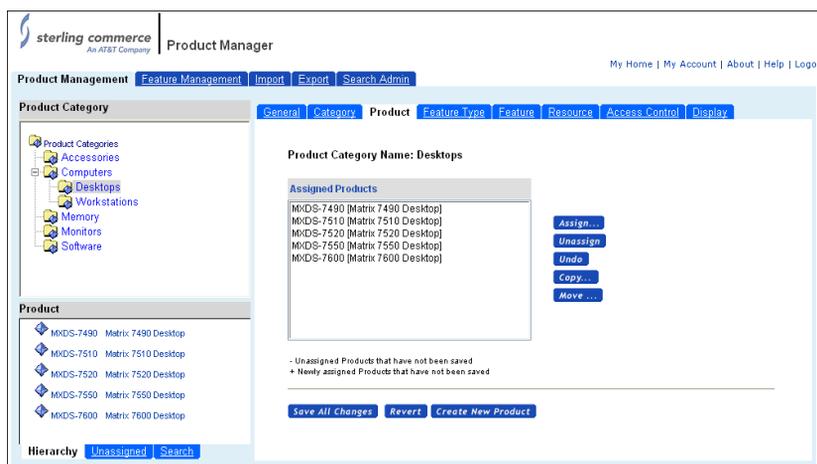


FIGURE 34. Desktops Category with Desktop Products

Creating the Workstation Products

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

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

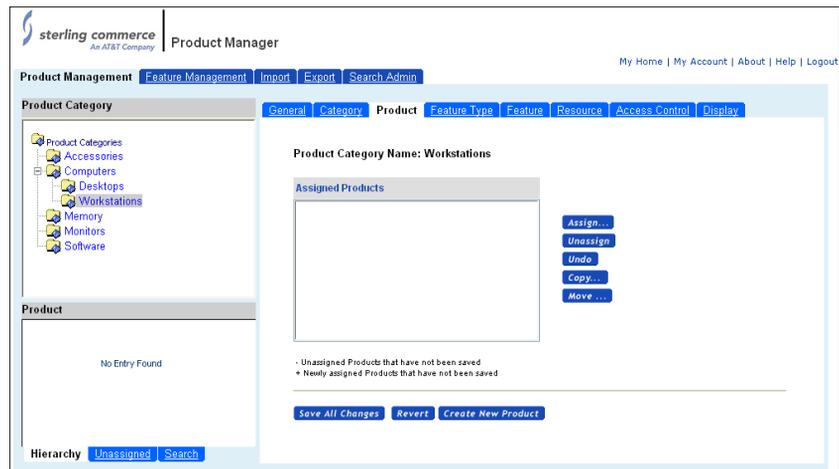


FIGURE 35. Product Tab

3. Click **Create New Product**.

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

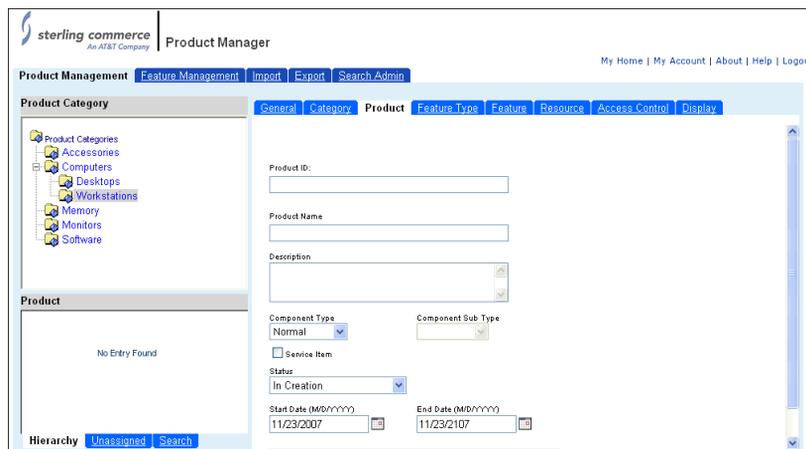


FIGURE 36. Product Tab with Fields for New Product

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

TABLE 6. Matrix 7510 Workstation

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

End-users view the Description that you enter here when they browse your product catalog.

5. Select the Component Type as Normal.
6. Select Released from the **Status** drop-down list.
7. Enter a Start Date (the current date) and an End Date (a date five years from the current date).

8. Click **Save and Return**.

Notice that the Matrix 7510 Workstation appears in the Product list for the Workstations category, as shown in the following figure.

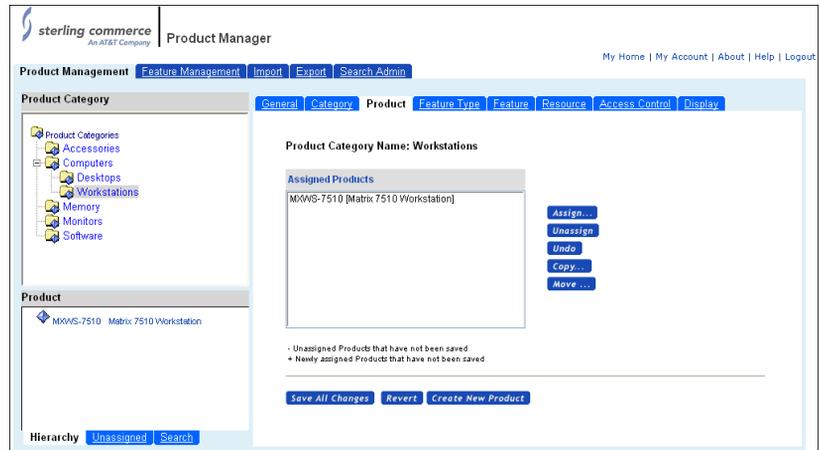


FIGURE 37. Product Frame with New Product

9. In the left-hand Product panel, click Matrix 7510 Workstation, then click the **Sales** tab.
10. Accept the default values for the Unit of Measure (**EA**), the Quantity Per Unit (**1.000000**), and enter the Lead Time in days (**30**), and leave the Cannot be sold separately, Not Eligible for In-Store Pickup, Not Eligible for Shipping Discount, and Not Shippable boxes unchecked.
11. Enter an Image URL: `../images/workstation.jpg`.
The end-user views this product image when they browse the catalog.
12. Leave the Datasheet URL field blank.
13. Click **Save Changes**.

14. Create the remaining product in the Workstations category. Use the information in Table 7 on page 41.

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

TABLE 7. Workstation Product to be Created

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

When you complete this exercise, the Product frame for the Workstations product panel appears as shown in the following figure.

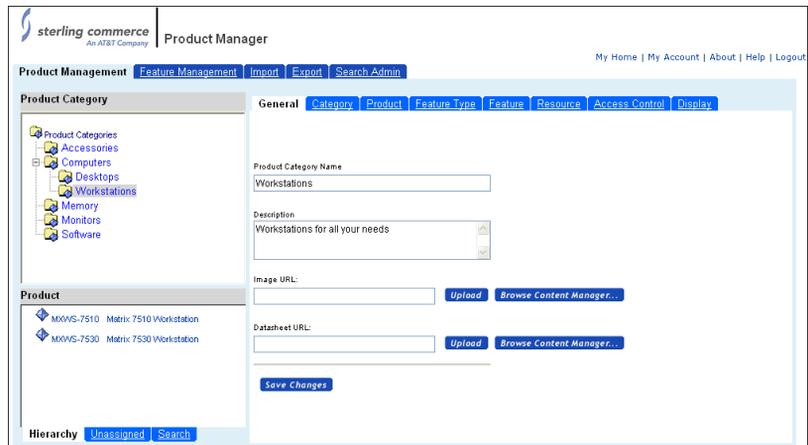


FIGURE 38. The Workstations Product Panel

Generating a Product Index

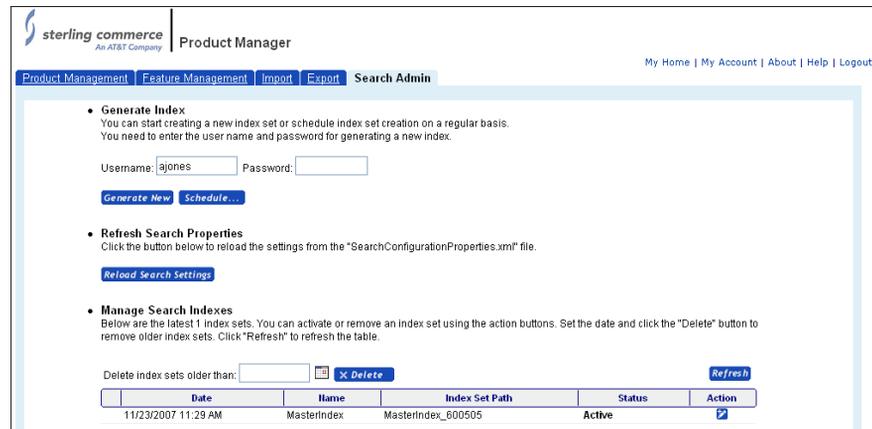
Now that you have created simple products, you generate a product index. The product index enables users to search for and find the products on your site.

1. Log in as the enterprise administrator user ajones (password ajones).
2. In the Product and Catalog Administration panel, click Product Master.

The now-familiar Product Manager page displays.

3. Click the **Search Admin** tab.

The Search Administration page displays, as shown in the following figure.



The screenshot shows the Sterling Commerce Product Manager interface. The 'Search Admin' tab is selected. The page contains three main sections:

- Generate Index:** A section with instructions on how to create a new index set. It includes input fields for 'Username' (containing 'ajones') and 'Password', and two buttons: 'Generate New' and 'Schedule...'.
`Username: Password:`
- Refresh Search Properties:** A section with instructions to reload settings from a file. It includes a 'Reload Search Settings' button.
- Manage Search Indexes:** A section with instructions on how to activate or remove index sets. It includes a 'Delete' button and a 'Refresh' button.

At the bottom, there is a table with the following data:

Date	Name	Index Set Path	Status	Action
11/23/2007 11:29 AM	MasterIndex	MasterIndex_000505	Active	<input checked="" type="checkbox"/> Refresh

FIGURE 39. Product Manager Generate Index Page

4. Enter the password for ajones (ajones), then click **Generate New**.

A message appears informing you that the generate index request has been submitted. Click OK. Click Refresh to monitor the status of the index generation.

5. When the index is complete, its status is set to Valid. Activate the index by clicking the checkmark icon in the Action column. The status of the index is set to Active.

Setting Prices for Products

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

Creating a Price List for a Category of Products

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

1. Click **Admins Login Here** on the Matrix Home page, then log in as the **bwillow** user (password: **bwillow**) you created in LESSON 1, "Enterprise Users and Their Functions".

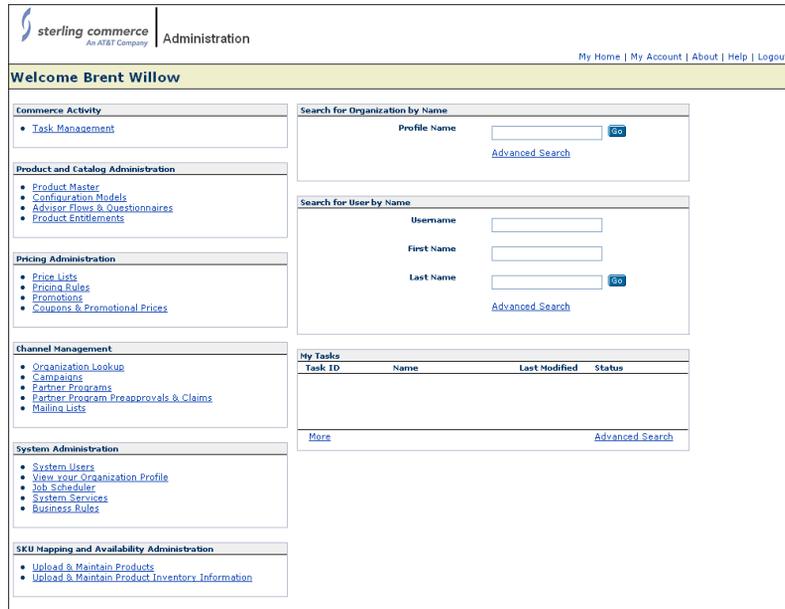


FIGURE 40. Enterprise Home Page

2. Click Price Lists.

The Price Lists page appears.



FIGURE 41. Price Lists Page

3. Click New Price List.

The New Price List page appears.

The screenshot shows the 'New Price List' page in the Sterling Commerce system. The page has a header with the Sterling Commerce logo and 'Price Lists' text. Below the header, there is a navigation bar with 'My Home | My Account | About | Help | Logout' and a 'Go to Price Lists' link. The main content area is titled 'New Price List' and has a sub-header 'Edit Header'. Below this, there is a prompt: 'Enter data and click on Create button to create price list.' To the right of this prompt are 'Create' and 'Cancel' buttons. Below the prompt is a form titled 'Price List Header'. The form contains several fields, all marked with an asterisk to indicate they are required. The fields are: Name (text input), Description (text input with a scroll bar), Currency (dropdown menu), Customer Type (dropdown menu), Supplier (text input with a value of 'Matrix Solutions Inc' and an 'Assign...' button), Starting Date (date and time input, with '0:00' selected), Ending Date (date and time input, with '0:00' selected), and Active (checkbox). A legend indicates that fields with an asterisk are required.

FIGURE 42. New Price List Page

4. Enter the basic information about the price list as shown in Table 8 on page 45.

TABLE 8. Entries for General Information

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

5. Click the **Active** check box.

At this point, the new price list should appear as in Figure 43 on page 46.

FIGURE 43. Price List Detail Page

- Click **Create**. The Price List Detail page appears as shown in the following figure.

FIGURE 44. Commercial_One Price List Page

- Next, you assign products to the price list you just created. In this case, you assign all the products you have created so far to the Commercial_One price list. Click **Assign Products**.

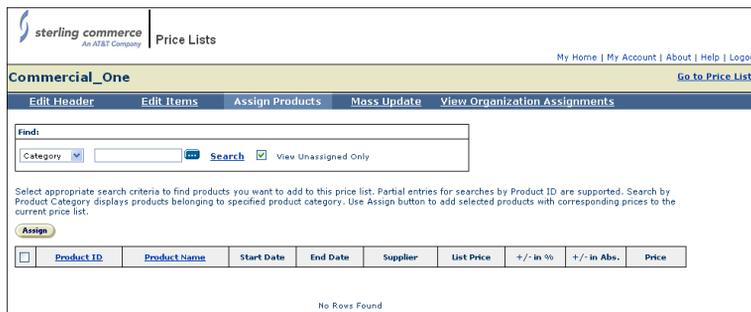


FIGURE 45. Price List Detail Page: Assign Products Tab

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

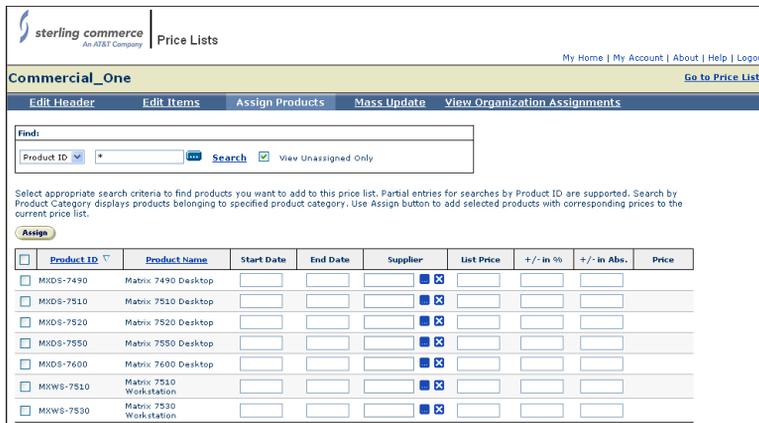


FIGURE 46. Price List Detail Page: Assign Products Tab

10. On each line, enter 1999.00 in the List Price field.
11. Click the check box next to the Product ID heading to select all the products.
12. Click Assign.

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Price Lists

My Home | My Account | About | Help | Logout

Commercial_One [Go to Price Lists](#)

Edit Header | Edit Items | Assign Products | Mass Update | View Organization Assignments

Find:

Category View Unassigned Only

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

Assign

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

FIGURE 47. Price List Detail Page: Prices Added

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

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

13. Click **Edit Items**.

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Price Lists

My Home | My Account | About | Help | Logout

Commercial_One [Go to Price Lists](#)

Edit Header | Edit Items | Assign Products | Mass Update | View Organization Assignments

Find:

Category

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

Delete **Save**

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

[Back to Top](#) **Save**

FIGURE 48. Price List Detail Page: Edit Items Tab

- Modify the prices of the following products.

TABLE 9. Entries for Prices

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

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

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

- Click **Save**. Notice that the amounts listed in the Price column change, though the List Price amounts remain the same.
- Click **Go to Price Lists** to return to the Price Lists page.



FIGURE 49. Price Lists Page Showing New List

Notice the Enterprise Master List price list. This price list is installed with the Sterling Multi-Channel Selling Solution. You will modify the Enterprise Master List later in the lesson.

Creating a Price List for Selected Products

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

At the end of the last part of the lesson, the Price Lists page appears as in Figure 49 on page 49.

1. Click **New Price List**.

This displays the Price List Detail page (Figure 50 on page 50).

FIGURE 50. Price List Detail Page

2. Enter the basic information about the list.

Enter the information shown in Table 8 on page 45.

TABLE 10. Entries for General Information

Field	Information
Name	7510 Computers in US Dollars
Description	Desktops and/or Workstations with Special Prices
Currency	USD
Customer Type	Commercial

TABLE 10. Entries for General Information (Continued)

Field	Information
Starting Date	(Enter the current date, including hour/minute.)
Ending Date	(Enter a date three months from the current date, including hour/minute.)

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

At this point, the new price list should appear as in Figure 43 on page 46.

The screenshot shows the Sterling Commerce Price Lists interface. At the top, there is a navigation bar with the Sterling Commerce logo and 'Price Lists' title. Below this is a header for the price list: '7510 Computers in US Dollars'. A navigation menu includes 'Edit Header', 'Edit Items', 'Assign Products', 'Mass Update', and 'View Organization Assignments'. A help text block explains the 'Assign All', 'Unassign All', 'Download', 'Copy', and 'Save' buttons. The main form, titled 'Price List Header', contains the following fields:

- * Name: 7510 Computers in US Dollars
- Description: Desktops and/or Workstations with Special Prices
- * Currency: USD
- * Customer Type: Commercial
- * Supplier: Matrix Solutions Inc. (with an 'Assign...' button)
- * Starting Date: 11/23/2007 (with a time dropdown set to 2:00)
- * Ending Date: 11/23/2012 (with a time dropdown set to 2:00)
- Active:

 A '*Required Fields' label is present in the top right of the form area.

FIGURE 51. Price List Detail Page

We will assign only the Matrix 7510 Desktop and the Matrix 7510 Workstation products to this price list.

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

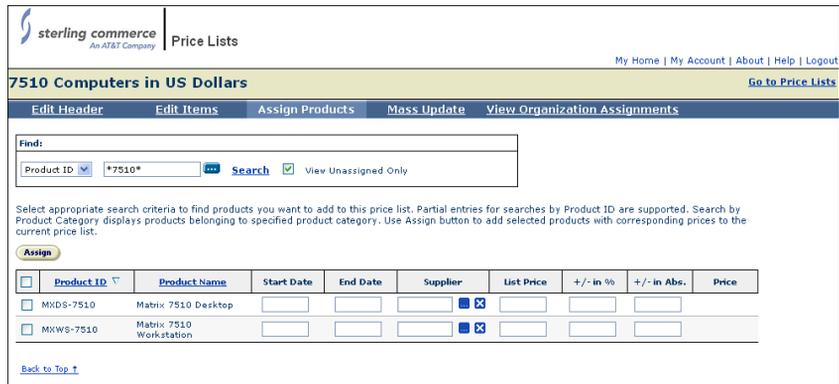


FIGURE 52. Price List Detail Page

You can now see both products that you added to the price list (Figure 52 on page 52).

8. On each line, enter 1999.00 in the List Price field.
9. Click the check box next to the Product ID header to select all.
10. Click **Assign**.

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

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

TABLE 11. Entries for Prices

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

13. Click **Save**. Notice that the price in the right-hand Price column changes.
14. Click **Go to Price Lists** to return to the Price Lists page.

Modifying the Enterprise Master List

The Enterprise Master List is a price list that is installed with the Sterling Multi-Channel Selling Solution. See the *Sterling Multi-Channel Selling Solution Administration Guide* to learn more about the Enterprise Master List.

In this part of the lesson, we add all the products to the Enterprise Master List. This list is then the master list, in US dollars, that you assign to customers to provide access to all Matrix products.

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

This displays the Price List Detail page for this list. In Figure 53 on page 53, examine the Assign Products tab. Notice that there are no products on this “master list” as yet.

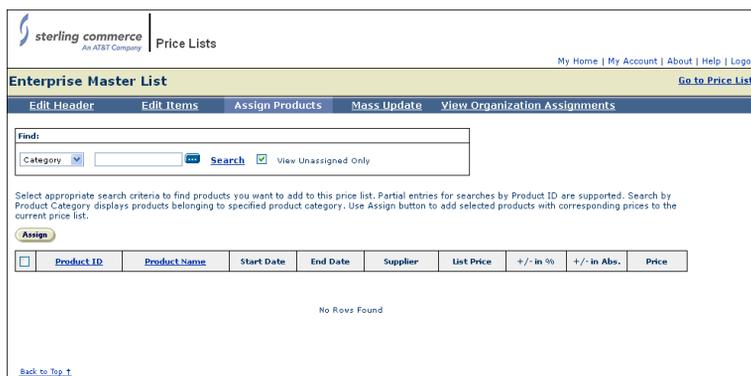


FIGURE 53. Enterprise Master List: Assign Products Tab

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

TABLE 12. Entries for Prices

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

TABLE 12. Entries for Prices (Continued)

Product	List Price	+/- in %	+/- in Abs.
MXDS-7520	1299.00		-10
MXDS-7550	1299.00		-10
MXDS-7600	1299.00	-10	
MXWS-7510	1299.00	-10	
MXWS-7530	1299.00	-5	

5. Click the check box next to the Product ID header to select all, then click **Assign**.
6. Click Edit Items.
7. Click the View/Assign Conditions to the Product icon at the right-hand end of the MXWS-7510 detail line:

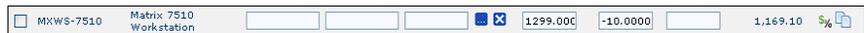


FIGURE 54. MXWS-7510 Detail

The Enterprise Master List detail page for MXWS-7510 appears.

8. Click the **Edit Conditional Rules** tab. The Conditional Rules List page appears, as shown in the following figure.

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Price Lists

My Home | My Account | About | Help | Logout

Enterprise Master List: MXWS-7510 [Return](#)

[Edit Quantity Tiers](#) [Edit Conditional Rules](#)

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

[Save](#)

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

FIGURE 55. Enterprise Master List Conditional Rules Page

Here you can set prices for particular conditions.

9. Accept the default options: Profile Type and Profile Membership Level.
10. Find the line with **Retailer** in the first column, and **Platinum** in the second column.
11. Enter **-10** for +/- in %. The Conditional Rules List page now appears as follows:

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An AT&T Company

My Home | My Account | About | Help | Logout

Enterprise Master List: MXWS-7510 [Return](#)

[Edit Quantity Tiers](#) [Edit Conditional Rules](#)

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

[Save](#)

Profile Type	Profile Membership Level	+/- in %	+/- in Abs.
Distributor	Platinum		
Distributor	Gold		
Distributor	Silver		
Distributor	Tin		
Distributor	Not Applicable		
OEM	Platinum		
OEM	Gold		
OEM	Silver		
OEM	Tin		
OEM	Not Applicable		
Reseller	Platinum		
Reseller	Gold		
Reseller	Silver		
Reseller	Tin		
Reseller	Not Applicable		
Retailer	Platinum	-10	
Retailer	Gold		

FIGURE 56. Conditional Price List Page

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

Exercises

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

Creating Partners, Partner Administrators, and Partner Users

You have created enterprise users and, by assigning them particular functions, you have given them the appropriate permissions for accessing the Sterling Multi-Channel Selling Solution. You have created products for the product catalog and you have set prices for those products.

The next step is to create your partners, assign price lists to them, and, for each partner, create a partner administrator. Each partner administrator will create the partner users for their company. These partner users are the end-users who will buy the products you created in LESSON 2, "Creating Simple Products".

Matrix Products has the following partners through which it sells its products:

TABLE 13. Matrix Products Partners

Partner Name	Partner Type	Description
Bellisima	Distributor	Buys Matrix products directly from Matrix.
CompCom	OEM	Buys Matrix products directly from Matrix.
FirstCommerce	Retailer	Buys Matrix products directly from Matrix.
HalonaSystems	Reseller	Buys Matrix products directly from Matrix.
FirstCommerce	Retailer	Buys Matrix products directly from Matrix.
PacificData	Reseller	Buys Matrix products directly from Matrix.

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

Creating a Partner

Enterprise users with access to the Program Management function can create partners. We will use the bwillow enterprise user you created in LESSON 1, "Enterprise Users and Their Functions" to create partners.

1. Login to the Sterling Multi-Channel Selling Solution Administration page as the bwillow user (password: bwillow).

The screenshot shows the Sterling Commerce Administration interface. The top header includes the Sterling Commerce logo and the text "Administration". A navigation bar contains links for "My Home", "My Account", "About", "Help", and "Logout". Below the header, a yellow banner displays "Welcome Brent Willow".

The main content area is divided into several sections:

- Commerce Activity:** Includes a link for "Task Management".
- Product and Catalog Administration:** Includes links for "Product Master", "Configuration Models", "Advisor Flows & Questionnaires", and "Product Entitlements".
- Pricing Administration:** Includes links for "Price Lists", "Pricing Rules", "Promotions", and "Coupons & Promotional Prices".
- Channel Management:** Includes links for "Organization Lookup", "Campaigns", "Partner Programs", "Partner Program Preapprovals & Claims", and "Mailings Lists".
- System Administration:** Includes links for "System Users", "View Your Organization Profile", "Job Scheduler", "System Services", and "Business Rules".
- SKU Mapping and Availability Administration:** Includes links for "Upload & Maintain Products" and "Upload & Maintain Product Inventory Information".

On the right side, there are two search panels:

- Search for Organization by Name:** Features a "Profile Name" input field, a "Go" button, and an "Advanced Search" link.
- Search for User by Name:** Features input fields for "Username", "First Name", and "Last Name", a "Go" button, and an "Advanced Search" link.

Below the search panels is a "My Tasks" section with a table:

Task ID	Name	Last Modified	Status

At the bottom of the "My Tasks" section, there is a "More" link and an "Advanced Search" link.

FIGURE 57. Enterprise Home Page

2. Click **Go** in the Search for Organization by Name panel.

The Profile List page appears.

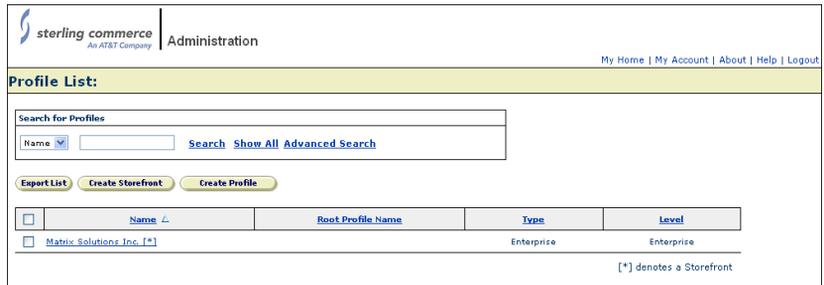


FIGURE 58. Profile List Page

3. Click **Create Profile**.

This displays the Organization Profile: New Profile page.

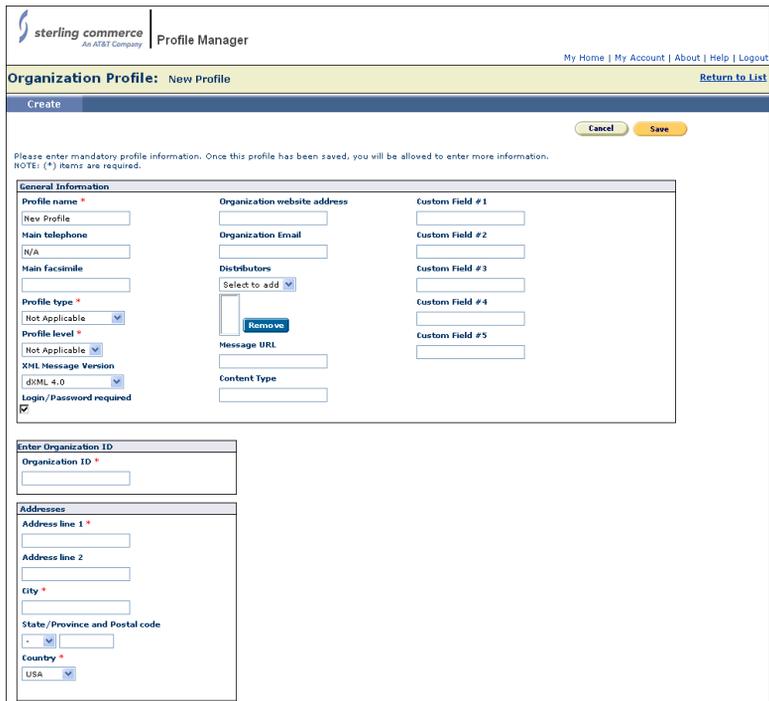


FIGURE 59. Organization Profile: New Profile Page

4. Enter the following partner information:

- Profile name: Bellisima
- Profile type: Distributor
- Profile level: Gold
- Message URL: <http://commerce.company.com/Sterling/msg/bellisima>
- Organization ID: BELLA-1000

Accept the default XML Message Version (dXML 4.0). When partner users place orders to the Bellisima partner, the communication between Matrix and Bellisima will use the dXML 4.0 message format using the specified Message URL.

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

5. Enter the following address information:

- Address line 1: 1026 Pyrenean Way
- City: Navarra
- State/Province and Postal Code: CA 90013
- Country: USA

6. Click **Save**.

The Organization Profile page displays as shown in the following figure.

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An AT&T Company

Profile Manager

My Home | My Account | About | Help | Logout

Organization Profile: Bellisima [Return to List](#)

Info | Addresses | Detail | Business | Hierarchy | Commerce | Assigned To | Pricelists | Product Entitlements | Attributes

Notes [View Users](#) [Save](#)

NOTE: (*) items are required.

General Information

Profile name *
Bellisima

Main telephone
N/A

Main facsimile
N/A

Profile type *
Distributor

Profile level *
Gold

XML Message Version
dXML 4.0

Login/Password required

Organization website address

Organization Email

Distributors
Select to add

Remove

Message URL
http://commerce.compa

Content Type

Custom Field #1

Custom Field #2

Custom Field #3

Custom Field #4

Custom Field #5

Profile Status

Please enter a reason when changing the status.

Status
Open

Reason

Accounts

Currency
USD

Credit Limit
\$0.00

Available Credit
\$0.00

Co-op %
0.000
The maximum precision allowed for a co-op % is 3. Numbers exceeding this precision will be rounded. Numbers larger than 100 will be ignored.

Co-op Account Maximum
0.00

View Account Details
MDF [GO](#)

FIGURE 60. Bellisima Organization Profile

Notice that the tabs have changed and that the new profile's status is Open. The basic profile information is saved. Now you can add profile administration using the profile administration tabs.

7. Click the **Addresses** tab. The Addresses page displays as shown in the following figure.

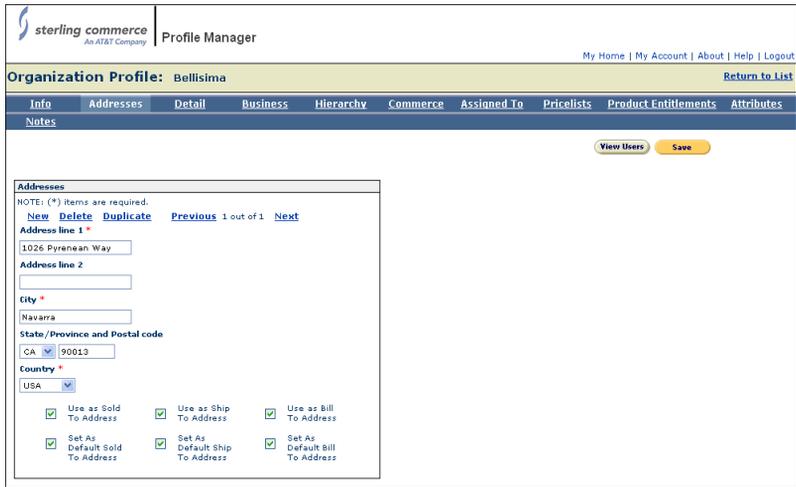


FIGURE 61. Organization Profile Addresses Page

Notice that all the check boxes are checked by default: the address you entered previously is used for all aspects of Bellisima’s business.

8. Bellisima uses a different address for its default Ship To address. To set it up:
 - a. Bellisima’s Ship To address is similar to its corporate address, so rather than type everything in again, click Duplicate.
 - b. Change Address line 1 to 1028 Pyrenean Way.
 - c. Check the Use as Ship To Address checkbox. A new check box appears: Set As Default Ship To Address. Click this check box as well.

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

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An AT&T Company

Profile Manager

My Home | My Account | About | Help | Logout

Organization Profile: Bellisima [Return to List](#)

Info Addresses **Detail** Business Hierarchy Commerce Assigned To Pricelists Product Entitlements Attributes

Notes [View Users](#) [Save](#)

Addresses

NOTE: (*) items are required.

[New](#) [Delete](#) [Duplicate](#) [Previous](#) 2 out of 2 [Next](#)

Address line 1 *
1028 Pyrenean Way

Address line 2
[]

City *
Navarra

State/Province and Postal code
CA 90013

Country *
USA

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

FIGURE 62. Organization Profile Duplicate Address Page

9. Click **Save**.

Notice that the tab shows "2 out of 2". Click the **Previous** link and notice that the first address reappears.

10. Click the **Detail** tab.

sterling commerce
An AT&T Company

Profile Manager

My Home | My Account | About | Help | Logout

Organization Profile: Bellisima [Return to List](#)

Info Addresses **Detail** Business Hierarchy Commerce Assigned To Pricelists Product Entitlements Attributes

Notes [View Users](#) [Save](#)

NOTE: (*) items are required.

Detail

Organization ID *	Founded	Current FY Revenue
BELLA-1000	[]	0.000000
Dun & Bradstreet ID	Total # of employees	Next FY Revenue
0	0	0.000000
External Partner ID		Fiscal year end month
[]		January

Services Skills

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

Service name
Asset Mgmt

Service description
Asset Management

Service level

FIGURE 63. Detail Tab

11. Enter the Dun & Bradstreet ID: D00212P.

The Dun & Bradstreet ID identifies the partner company to the outside world.

12. Click **Save**.

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

13. Click the **Business** tab.

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

The screenshot displays the Sterling Commerce Profile Manager interface for the organization 'Bellissima'. The 'Business' tab is selected, showing a form for managing business relationships. The form includes sections for 'Product Categories', 'Territories', and 'Customer types', each with a 'Select To Add' dropdown and a 'Delete' button. Below these is a 'Contracts' section with a table for adding new contracts. The table has columns for Name, Type code, Agreement date, Active date, End date, Volume commitment (YR), and Volume commitment (QTR). A 'Notes' field is also present at the bottom of the form.

FIGURE 64. Business Tab

14. In the Business panel, select **North America** from the Territories drop-down list.
15. Select the following types from the **Customer types** drop-down list:
 - General
 - Government
 - Commercial
 - Pharmaceutical

- Telecommunications
- High Technology
- Education

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

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

The remaining fields are optional.

17. Click **Duplicate** to create a second contract.

18. Modify the Name (PRS2-RG03013) and Type code (MS2-PN002871).

When you have entered this information, the Business tab appears as shown in the following figure.

The screenshot shows the Sterling Commerce Profile Manager interface for partner Bellisima. The 'Business' tab is selected, displaying a form with several sections:

- Product Categories:** A dropdown menu set to 'Select To Add' and a 'Delete' button.
- Territories:** A dropdown menu set to 'Select To Add' with 'North America' selected, and a 'Delete' button.
- Customer types:** A dropdown menu set to 'Select To Add' with 'General' selected, and a 'Delete' button.
- Contracts:** A section with navigation links 'Delete', 'Duplicate', 'Previous 2 out of 2', and 'Next'. Below these are fields for:
 - Name:** PRS2-RG03013
 - Type code:** MS2-PN002871
 - Agreement date (M/D/YYYY):** [Empty]
 - Active date (M/D/YYYY):** [Empty]
 - End date (M/D/YYYY):** [Empty]
 - Volume commitment (YR):** 0
 - Volume commitment (QTR):** 0
- Notes:** A text area for entering notes.

FIGURE 65. Business Tab with Entries

19. Click **Save**.

20. Click the **Commerce** tab. On this page, you set up how this partner does business. Enter the following values:

- Check the following Payment Options check boxes:
 - Credit Card

-
-
- Visa
 - MasterCard
 - Account
- Check the following Shipping Options check box:
 - Standard Shipping
21. Click **Save**.

The Organization Profile page reappears and the information is saved.
 22. Click the **Pricelists** tab. On this page, you assign price lists to partners.

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

Creating a Partner Administrator

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

In the first part of this lesson, we created a partner named Bellisima. By the end of the last section, the Organization Profile page should appear as in Figure 65 on page 65.

1. Click **View Users**.

This displays the User List page.



FIGURE 66. User List Page

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

FIGURE 67. User Detail Page

3. Enter the following information about the user:

- Username: rdodger
- Password: rdodger
- Confirm Password: rdodger
- Title: Ms
- First name: Rosie
- Last name: Dodger

- Email: rdodger@bellisima.com

The remaining fields are optional.

4. Among the Functions, click the **Profile Administration** check box.
5. Click **Save**.

This displays the User Detail page, showing the new user details (Figure 68 on page 69).

The screenshot shows the 'User Detail for Rosie Dodger' page in the Sterling Commerce Administration interface. The page has a navigation bar with 'Info', 'Addresses', 'Preferences', 'Attributes', and 'Notes' tabs. Below the navigation bar, there are buttons for 'View Users' and 'Save'. The main content area is divided into several sections:

- User Information:** Includes fields for Username (rdodger), Password, Confirm Password, Title (Ms.), First name (Rosie), Last name (Dodger), Job Title, Email (rdodger@bellisima.com), Department name, and Department description. There is also a 'Phones' section with a dropdown for 'Business' and an 'Add' button, and an 'Away' checkbox.
- User Locale:** Includes a 'Preferred Locale' dropdown set to 'United States' and a note: 'Note: changes to Preferred Locale will take effect on the next login.'
- User Functions:** Includes a 'Manager' checkbox and a 'User Type' dropdown set to 'User'. Below these are several 'Functions' checkboxes: Commerce, Commerce Executive, Sales, Sales Executive, Financials, Marketing Executive, Basic Profile Maintenance, Profile Administration (checked), Offline Access, and Product Reviewer.
- Status:** Includes a 'Status' dropdown set to 'Open' and a 'Comment' text area. A note says: 'Please enter a reason when changing the status.'
- Spending Limits & Approver:** Includes a 'Spending Limit' dropdown set to 'USD' and an 'Approver' text area. A note says: 'Feature requires both Spending Limit and Approver.'

FIGURE 68. User Detail Page

6. Click **View Users**.



FIGURE 69. User List Page

7. Click **Logout**.

Creating the Partner Users

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

1. Point your browser to the URL for end-users to log in to the Sterling Multi-Channel Selling Solution. This will look something like this:

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

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

This displays the Partner Users Home page.



FIGURE 70. Partner User Home Page

2. From the Login panel, log in as the rdodger user (password: rdodger) that you just created.
3. In the Commerce Tasks panel, click Update User Accounts.

This displays the Partner User List page.



FIGURE 71. Partner User List Page

4. Click **Create User**.

This displays the Partner User Detail page.

MATRIX Solutions powered by  sterling commerce
in 800.633.6262

[My Home](#) | [My Account](#) | [Help](#) | [Logout](#)

Create New User

Info

Belongs To: [Bellissima](#)

NOTE: (*) Items are required.

<p>User Information</p> <p>Username * <input type="text"/></p> <p>Password * <input type="password"/></p> <p>Confirm Password * <input type="password"/></p> <p>Title <input type="text" value="Mr."/> <input type="text"/></p> <p>First name * <input type="text"/></p> <p>Last name * <input type="text"/></p> <p>Job Title <input type="text"/></p> <p>Email * <input type="text"/></p> <p>Department name <input type="text"/></p> <p>Department description <input type="text"/></p> <p>Phones <input type="text" value="Business"/> <input type="text"/> <input type="button" value="Add"/></p> <p><input type="text"/> <input type="button" value="Remove"/></p> <p>Away <input type="checkbox"/></p>	<p>User Locale</p> <p>Preferred Locale <input type="text" value="United States"/></p> <p><small>Notes: changes to Preferred Locale will take effect on the next login.</small></p>	<p>User Functions</p> <p><input type="checkbox"/> Manager</p> <p>User Type <input type="text" value="User"/></p> <p>Functions</p> <p><input type="checkbox"/> Commerce</p> <p><input type="checkbox"/> Commerce Executive</p> <p><input type="checkbox"/> Sales</p> <p><input type="checkbox"/> Sales Executive</p> <p><input type="checkbox"/> Financials</p> <p><input type="checkbox"/> Marketing Executive</p> <p><input type="checkbox"/> Basic Profile Maintenance</p> <p><input type="checkbox"/> Profile Administration</p> <p><input type="checkbox"/> Offline Access</p> <p><input type="checkbox"/> Product Reviewer</p>	<p>Payment Options</p> <p><small>Please enter the default payment information</small></p> <p>Payment Type <input type="text" value="Credit card"/></p> <p>Credit Card Type <input type="text" value="Visa"/></p> <p>Payment Expiration Date <input type="text" value="November"/> <input type="text" value="2007"/></p> <p>Payment Number/Account Number <input type="text"/></p> <p>Card holder name First Name <input type="text"/></p> <p>Middle Name/Initial <input type="text"/></p> <p>Last Name <input type="text"/></p>
<p>Attributes</p> <p style="text-align: center;">No Rows Found</p>			

FIGURE 72. Partner User Detail Page

5. Enter the following information:
 - Username: hfortuna
 - Password: hfortuna
 - Confirm Password: hfortuna
 - Title: Mr
 - First Name: Hal
 - Last Name: Fortuna

- Email: hfortuna@bellisima.com

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

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

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



FIGURE 73. Partner User List Page

Exercises

- Create another partner user for Bellisima using the steps in "Creating the Partner Users" on page 70. Use the following information.
 - Username: fbencroft
 - Password: fbencroft
 - Confirm Password: fbencroft
 - Title: Mr
 - First Name: Frank
 - Last Name: Bencroft
 - Email: fbencroft@bellisima.com
 - Check the **Commerce** function check box.

- Create another partner using the steps in "Creating a Partner" on page 58. Use the following information:

- Partner Information:

TABLE 14. Partner Information

Partner Name	Partner Type	Partner Level	Organization ID
FirstCommerce	Retailer	Platinum	M00515V

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

- Partner Addresses:

TABLE 15. Partner Addresses

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

- Click **Save**.
- Click the Business tab, then fill out the business details as follows.

TABLE 16. Partner Detail

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

Click **Save**.

- Click the **Pricelists** tab. On this page, you assign price lists to this partner: Check the check box next to the Enterprise Master List.
- Click **Save**.

- Create a partner administrator for the FirstCommerce partner, using the steps in "Creating a Partner Administrator" on page 66. Use the following information:
 - Username: mpoyser
 - Password: mpoyser
 - Confirm Password: mpoyser
 - Title: Mr
 - First name: Martin
 - Last name: Poyser
 - Email: mpoyser@firstcommerce.com
 - Functions: Profile Administration
- Create a partner user for the FirstCommerce partner, using the steps in "Creating the Partner Users" on page 70. Use the following information:
 - Username: jspencer
 - Password: jspencer
 - Confirm Password: jspencer
 - Title: Ms
 - First Name: Jane
 - Last Name: Spencer
 - Email: jspencer@firstcommerce.com
 - Functions: Commerce
- Create another partner using the steps in "Creating a Partner" on page 58. Use the following information:
 - Partner Information:

TABLE 17. Partner Information

Partner Name	Partner Type	Partner Level	Organization ID
CompCom	OEM	Platinum	M14512V

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

- Partner Addresses:

TABLE 18. Partner Addresses

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

- Click **Save**.
- Click the Business tab, then fill out the business details as follows.

TABLE 19. Partner Detail

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

- Click the **Pricelists** tab. On this page, you assign price lists to this partner:
 - Check the check box next to the Enterprise Master List.
 - Click **Save**.
- Create a partner administrator for the CompCom partner, using the steps in "Creating a Partner Administrator" on page 66. Use the following information:
 - Username: dirwine
 - Password: dirwine
 - Confirm Password: dirwine
 - Title: Mr
 - First name: David
 - Last name: Irwine
 - Email: dirwine@compcom.com

- Functions: Profile Administration
- Create a partner user for the CompCom partner, using the steps in "Creating the Partner Users" on page 70. Use the following information:
 - Username: adonnithorne
 - Password: adonnithorne
 - Confirm Password: adonnithorne
 - Title: Mr
 - First Name: Arthur
 - Last Name: Donnithorne
 - Email: adonnithorne@compcom.com
 - Functions: Commerce

Creating another Partner

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

1. Login to the Sterling Multi-Channel Selling Solution as the bwillow user (password: bwillow) you created in LESSON 1, "Enterprise Users and Their Functions".

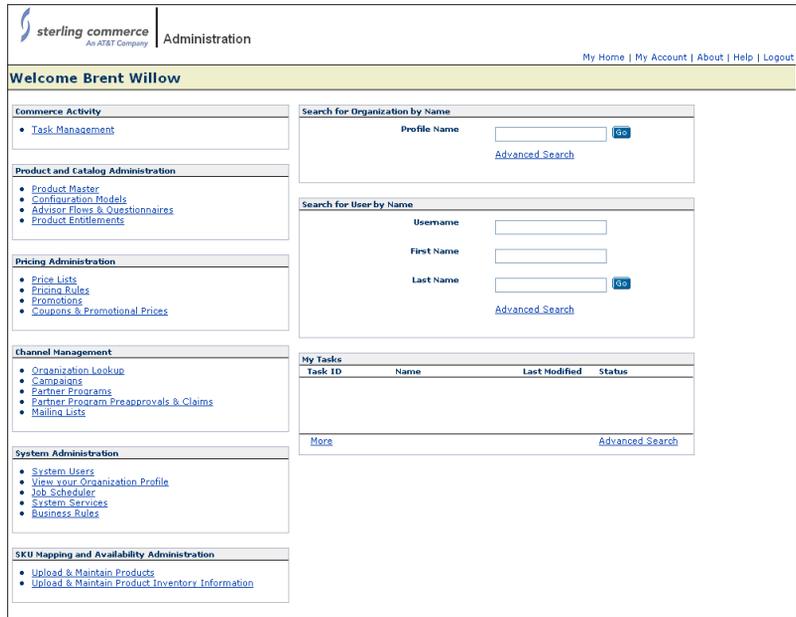


FIGURE 74. Enterprise Home Page

2. Click **Go** in the Search for Organization by Name panel.

The Profile List page appears.

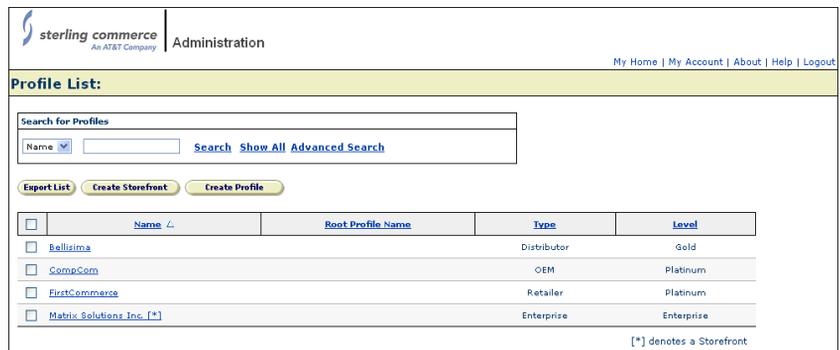


FIGURE 75. Partner Search Page

3. Click **Create Profile**.

This displays the Organization Profile page.

4. Enter the following partner information:

- Profile name: Halona Systems
- Profile type: Reseller
- Profile level: Gold
- Distributors: Bellisima
- Organization ID: M00512A

Notice that you do not have to specify a distributor.

5. Enter the following address information:

- Address line 1: 1011 Granada Blvd
- Address line 2: Suite 17
- City: Seattle
- State/Province and Postal Code: WA 98201
- Country: USA

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

6. Click **Save**.

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Profile Manager

My Home | My Account | About | Help | Logout

Organization Profile: Halona Systems [Return to List](#)

Info | Addresses | Detail | Business | Hierarchy | Commerce | Assigned To | Pricelists | Product Entitlements | Attributes

Notes View Users Save

NOTE: (*) items are required.

General Information

Profile name *
Halona Systems

Main telephone
N/A

Main facsimile
N/A

Profile type *
Reseller

Profile level *
Gold

XML Message Version
dXML 4.0

Login/Password required

Organization website address

Organization Email

Distributors
Select to add
Bellissima Remove

Message URL

Content Type

Custom Field #1
Custom Field #2
Custom Field #3
Custom Field #4
Custom Field #5

Profile Status

Please enter a reason when changing the status.

Status
Open

Reason

Accounts

Currency
USD

Credit Limit
\$0.00

Available Credit
\$0.00

Co-op %
The maximum precision allowed for a co-op % is 3. Numbers exceeding this precision will be rounded. Numbers larger than 100 will be ignored.
0.000

Co-op Account Maximum
0.00

View Account Details
MDF 62

FIGURE 76. Organization Profile Detail Page

7. Click the **Business** tab (Figure 77 on page 81).

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

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

- Commercial
- Pharmaceutical
- Telecommunications
- High Technology
- Education

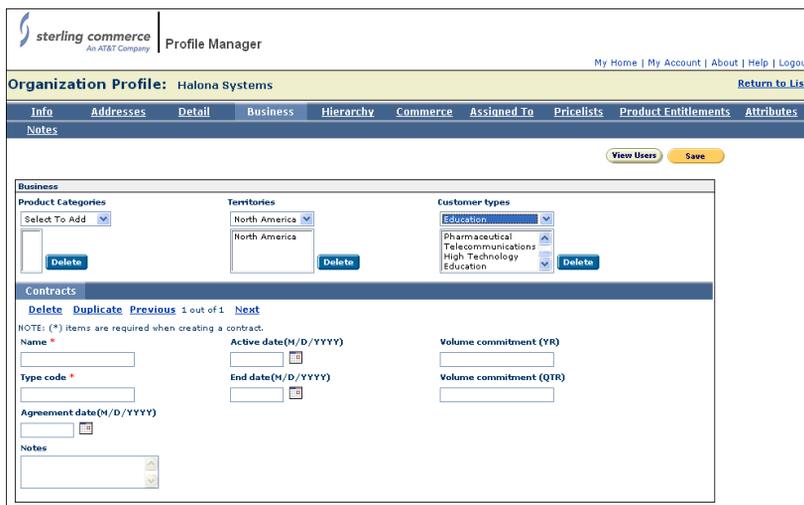


FIGURE 77. Organization Profile: Business Tab

10. In the **Contracts** sub-tab, enter information about business agreements between Matrix Products and this partner.
 - Name: PRS-RG03013
 - Type code: MS-PN002871

The remaining fields are optional.
11. Click **Duplicate** to create a second contract. Enter the following information:
 - Name: PRS5-RG53018
 - Type code: MS5-PN007891
12. Click **Save**.
The Organization Profile page reappears and the information is saved.

-
13. Click the **Pricelists** tab. On this page, you assign price lists to this partner:
 - a. Check the check box next to the Enterprise Master List price list.
 - b. Click **Save**.

Creating a Partner Administrator for the Partner

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

In the last section, we created another partner named Halona Systems. By the end of the last section, the Partner Profile page should appear as in Figure 76 on page 80.

1. Click **View Users**.

This displays the Partner User List page.
2. Click **Create User** to display the User Detail page.

FIGURE 78. Partner User Detail Page

3. Enter the following information about the user:

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

- Functions: click the **Profile Administration** check box
- The remaining fields are optional.
4. Click **Save**.
 5. Click **View Users**.
- This displays the Partner User List page, showing the new partner administrator.
6. Click **Logout**.

Creating the Partner Users for the Partner

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

1. In the Login panel, log in as the acharlton user (password: acharlton).
- This displays the Partner User Home page.

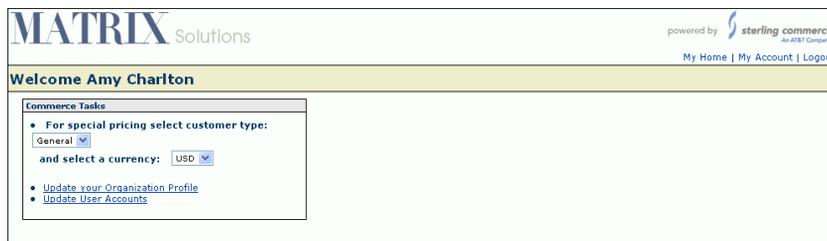


FIGURE 79. Partner Home Page

2. Click **Update User Accounts**.
- This displays the Partner User List page.
3. Click **Create User**.
- This displays the Partner User Detail page.
4. Enter the following information:
 - Username: rlasterman
 - Password: rlasterman

- Confirm: Password: rlasterman
 - Title: Mr
 - First Name: Ronald
 - Last Name: Lasterman
 - Email: rlasterman@halonasys.com
 - Functions: check the Commerce check box
5. Click **Save**.
 6. Click **View Users**.

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

Assigning Price Lists to System-Generated Partners

In this part of the lesson, we assign price lists to the system-generated partners.

Price lists with products assigned to them are the means by which end-users see products. If you do not assign products to price lists, and if you do not assign price lists to partners, then end-users will not see any products when they come to your e-commerce site.

In addition to the partners you created in this lesson, there are the following standard partners generated by the system:

- `AnonymousUserPartner`

This partner enables anonymous users to browse the product catalog and purchase products from the catalog. Once the anonymous user has placed products in their shopping cart, they must register before they can complete their order. From then on, they become a registered user.
 - `RegisteredUserPartner`

This system-generated partner enables registered users to log in and purchase products from Matrix Solutions.
1. Log in to the Sterling Multi-Channel Selling Solution administration as the ajones user (password: ajones) you created in LESSON 1, "Enterprise Users and Their Functions".

- Click **Go** next to Organization Lookup to display the Profile Search page. The Profile Search page displays as shown in the following figure.

The screenshot shows the 'Profile List' page in the Sterling Commerce Administration interface. At the top, there is a search bar for profiles with a 'Name' dropdown and buttons for 'Search', 'Show All', and 'Advanced Search'. Below the search bar are three buttons: 'Export List', 'Create Storefront', and 'Create Profile'. The main content is a table with the following columns: Name, Root Profile Name, Type, and Level. The table lists several profiles, including 'AnonymousUserPartner', 'Bellissima', 'CompCom', 'FirstCommerce', 'Halona Systems', 'Matrix Solutions Inc. [*]', and 'RegisteredUserPartner'. A note at the bottom right states '*[*] denotes a Storefront'.

<input type="checkbox"/>	Name	Root Profile Name	Type	Level
<input type="checkbox"/>	AnonymousUserPartner		AnonymousUserPartner	Tin
<input type="checkbox"/>	Bellissima		Distributor	Gold
<input type="checkbox"/>	CompCom		OEM	Platinum
<input type="checkbox"/>	FirstCommerce		Retailer	Platinum
<input type="checkbox"/>	Halona Systems		Reseller	Gold
<input type="checkbox"/>	Matrix Solutions Inc. [*]		Enterprise	Enterprise
<input type="checkbox"/>	RegisteredUserPartner		RegisteredUserPartner	Silver

FIGURE 80. Profile Page As Seen By the ajones User

- Click the AnonymousUserPartner link.
- Click the **Pricelists** tab.

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

The screenshot shows the 'Organization Profile: AnonymousUserPartner' page in the Comergent Profile Manager. The page has a navigation bar with tabs for 'Info', 'Addresses', 'Detail', 'Business', 'Assigned To', 'Pricelists', 'Product Entitlements', and 'Notes'. Below the navigation bar is a table listing price lists. The table has columns for 'Assign', 'Sharable', 'Price List Name', 'Starting Date', 'Ending Date', 'Currency', 'Customer Type', 'Supplier', and 'Status'. The table lists three price lists: 'Enterprise Master List', 'Commercial_One', and '7510 Computers in US Dollars'. A 'View Users' button and a 'Save' button are located below the table.

Assign	Sharable	Price List Name	Starting Date	Ending Date	Currency	Customer Type	Supplier	Status
<input type="checkbox"/>	<input type="checkbox"/>	Enterprise Master List	1/17/2001	10/4/2010	USD	General	Matrix Solutions Inc.	Active
<input type="checkbox"/>	<input type="checkbox"/>	Commercial_One	11/8/2006	11/8/2011	USD	General	Matrix Solutions Inc.	Active
<input type="checkbox"/>	<input type="checkbox"/>	7510 Computers in US Dollars	11/8/2006	2/8/2007	USD	Commercial	Matrix Solutions Inc.	Active

FIGURE 81. The Partner Price Lists Page

- Click the check box next to the Enterprise Master List.
- Click **Save**.

The price list is assigned to the partner.

7. Click the Return to List link.

The Profile List page displays.

8. Click the RegisteredUserPartner link.
9. Click the **Pricelists** tab.
10. Check the check box next to the Enterprise Master List.

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

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

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

12. Click **Save**.

Exercises

- Create another partner user for Halona Systems using the steps in "Creating the Partner Users for the Partner" on page 84. Use the following information.
 - Username: rpatel
 - Password: rpatel
 - Confirm Password: rpatel
 - Title: Mr
 - First Name: Raj
 - Last Name: Patel
 - Email: rpatel@halonasys.com
 - Functions: check the Commerce check box

- Create one more partner using the steps in "Creating another Partner" on page 77. Use the following information:

- Partner Information:

TABLE 20. Partner Information

Partner Name	Partner Type	Partner Level	Distributor	Organization ID
PacificData	Reseller	Platinum	Bellisima	MD00488

- Partner Addresses:

TABLE 21. Partner Addresses

Address Line 1	Address Line 2	City	State/Province and Postal Code	Country
2000 Shell Drive		Pacifica	CA 94218	USA

- Business

TABLE 22. Partner Detail

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

- Click the **Pricelists** tab. On this page, you assign price lists to this partner:
 - Check the check box next to the Enterprise Master List price list.
 - Click **Save**.
- Create a partner administrator for the PacificData partner, using the steps in "Creating a Partner Administrator for the Partner" on page 82. Use the following information:
 - Username: jcade
 - Password: jcade

- Confirm Password: jcade
- Title: Mr
- First name: John
- Last name: Cade
- Email: jcade@pacdata.com
- Function: Profile Administration
- Create a partner user for the PacificData partner, using the steps in "Creating the Partner Users for the Partner" on page 84. Use the following information:
 - Username: jdarc
 - Password: jdarc
 - Confirm Password: jdarc
 - Title: Ms
 - First Name: Jean
 - Last Name: Darc
 - Email: jdarc@pacdata.com
 - Function: Commerce

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

Bringing Partners and Products Together

At this point, we have:

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

The following table summarizes the partners to this point:

TABLE 23. Summary of Partners

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

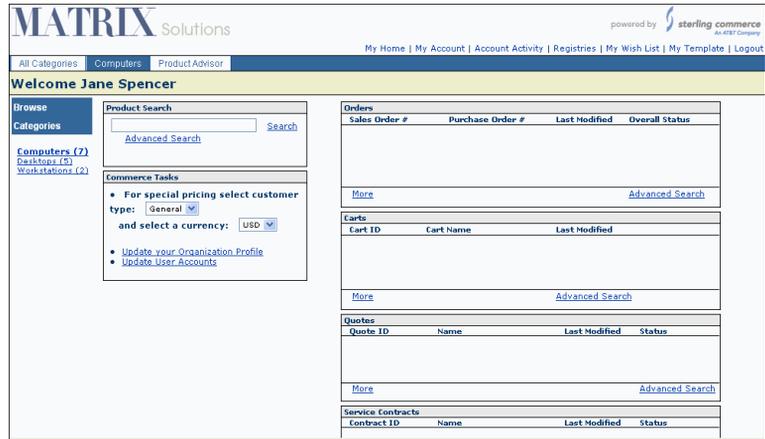
TABLE 23. Summary of Partners (Continued)

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

Browsing the Product Catalog

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

1. At the Matrix Home Page, log in as jspencer (password: jspencer).
Jane Spencer's home page displays, as shown in the following figure.



2. Click the **Computers** tab.

If you have done everything right, then you should see the screen appears as it is displayed in Figure 82 on page 94.



FIGURE 82. Browsing the Product Catalog

Notice the categories that are displayed. These are the categories you created in LESSON 2, "Creating Simple Products". Click the **Desktops** category. The Sterling Multi-Channel Selling Solution loads the catalog. The catalog page displays as shown in the following figure.

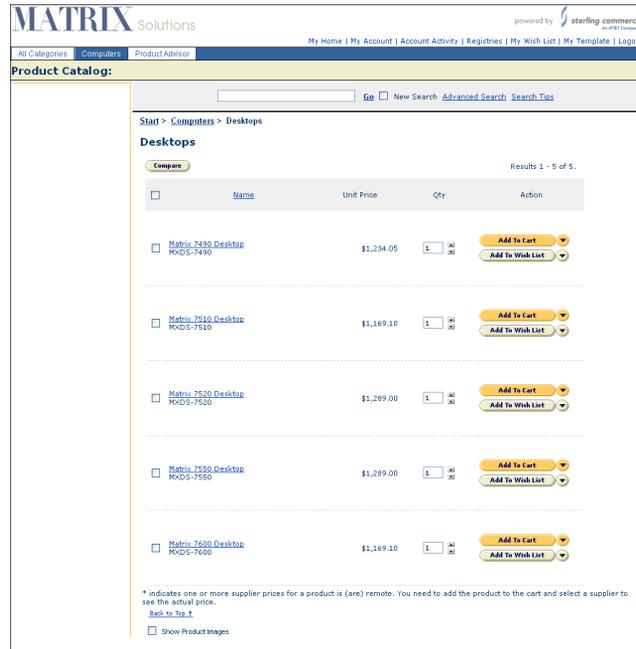


FIGURE 83. Browsing the Product Catalog

Notice the products that are displayed. If the end-user sees no products, then it is the result of one the following reasons:

- There are no products.
You created products in LESSON 2, "Creating Simple Products".
- The current date is out of the effectivity date ranges of the products.
In LESSON 2, "Creating Simple Products", when you created products, you assigned effectivity dates for each product. The dates could be incorrect. However, if you followed the instructions in that lesson, then the current date is within the range.
- There are no price lists.
We know there are price lists because we created them in LESSON 3, "Setting Prices for Products".

Browsing the Product Catalog with Price Lists

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

1. Log in as adonnithorne (password: adonnithorne) from the partner CompCom.
This displays the end-user home page.

The screenshot shows the MATRIX Solutions end-user home page. At the top, there is a navigation bar with 'All Categories', 'Computers', and 'Product Advisor'. A 'Welcome Arthur Donnithorne' message is displayed. The main content area is divided into several sections:

- Product Search:** A search box with 'Advanced Search' and a 'Search' button.
- Commerce Tasks:** A list of tasks:
 - For special pricing select customer type: General
 - and select a currency: USD
 - Update your Organization Profile
 - Update User Account
- Orders:** A table with columns: Sales Order #, Purchase Order #, Last Modified, Overall Status. Includes a 'More' link and 'Advanced Search'.
- Cards:** A table with columns: Card ID, Card Name, Last Modified. Includes a 'More' link and 'Advanced Search'.
- Quotes:** A table with columns: Quote ID, Name, Last Modified, Status. Includes a 'More' link and 'Advanced Search'.
- Service Contracts:** A table with columns: Contract ID, Name, Last Modified, Status. Includes a 'More' link and 'Advanced Search'.
- Sales Contracts:** A table with columns: Contract ID, Name, End Date, Status. Includes a 'More' link and 'Advanced Search'.
- Invoices:** A table with columns: Invoice #, Ref Order/Invoice #, Due Date, Status. Includes a 'More' link and 'Advanced Search'.
- Returns:** A table with columns: Return #, RMA #, Order #, Status. Includes a 'More' link and 'Advanced Search'.
- Routed Cards:** A table with columns: Card ID, Card Name, Sent to, Date Sent. Includes a 'More' link and 'Advanced Search'.
- Transaction Search:** A section with radio buttons for 'Orders' (selected) and 'Quotes', and a dropdown menu for 'with Sales-Order #'.
- Wish Lists:** A table with columns: Wish List Name, Last Modified, Date Created. Includes a 'More' link and 'Advanced Search'.
- Registries:** A table with columns: Registry ID, Event date, Event location, Last Modified, Date Created. Includes a 'More' link and 'Advanced Search'.
- Templates:** A table with columns: Template Name, Reminder Date, Last Modified, Date Created. Includes a 'More' link and 'Advanced Search'.

FIGURE 84. End-User Home Page

In the Commerce Tasks panel, notice the Customer Type and Currency settings. When end-users browse the product catalog, the catalog displays products from price lists whose Customer Type and Currency Code match these settings. If the drop-down list contains more than one selection, then you can select different

settings to browse from other products and prices from price lists that match the selected settings.

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

2. Click the **Computers** tab.
3. Click **Workstations**.

In Figure 85 on page 98, notice the products (two workstations) are displayed. This coincides with the two workstations that are on the Enterprise Master List assigned to the FirstCommerce partner. Notice the prices. These are prices from the Enterprise Master List.

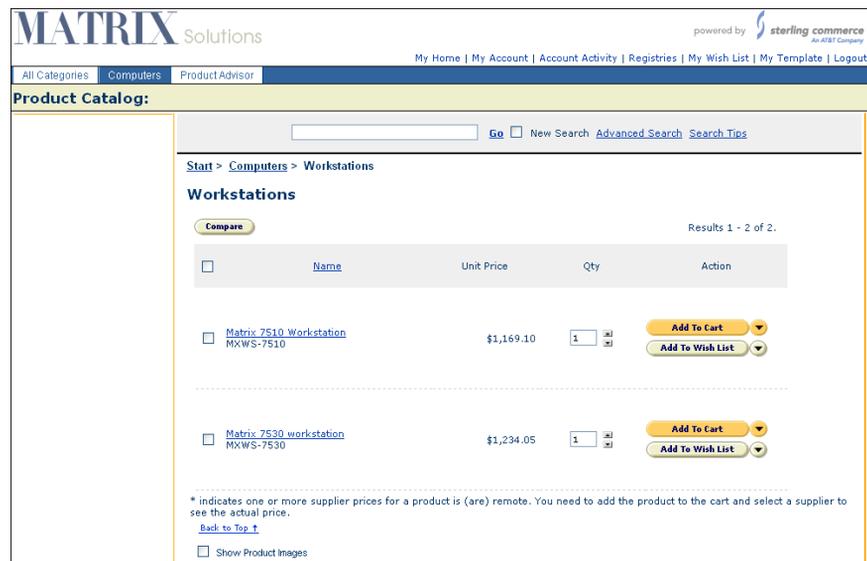


FIGURE 85. Browsing the Product Catalog

4. Click the Logout link to log out.

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

5. Log in as jspencer (password: jspencer) from the partner FirstCommerce.
6. Click the **Computers** tab.
7. Click **Workstations**.

Compare the prices for MXWS-7510: notice the difference in prices between that seen by jspencer (\$1,052.19) and adonnithorne (\$1,169.10). Remember that, in "Modifying the Enterprise Master List" on page 53, you set a special price (a conditional price) for this product for partners whose partner type was Retailer and whose partner level was Platinum. CompCom is an OEM and Platinum, whereas FirstCommerce is a Retailer and Platinum. Therefore, the end-user for FirstCommerce, jspencer, gets the conditional price.

Exercises

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

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

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

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

- "Properties" on page 107
- "Rules" on page 113
 - "Creating a Rule" on page 115
 - "Using Rules to Control Display of Option Items" on page 117
- "UI Controls" on page 123

- "Display Properties" on page 123
- "Tabular Displays" on page 124
- "Calculated Property Values" on page 125
- "User-Entered Values" on page 128
- "Images" on page 131

Create a Configurable Product

In this section, we create the product.

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

TABLE 24. Product Data

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

5. For the moment, leave the Component Type as Normal.
6. Select Released from the Status drop-down list.
7. Click **Save and Return**.
8. Click **My Home** to return to the enterprise home page.

Create the Model

1. In the Product and Catalog Administration panel, click **Configuration Models**.

The Visual Modeler administration page displays.

2. Click **New Model Group**.
3. Enter Computers in the Name and Description fields and click **Save**.

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

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

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

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

12. Click **Save**.
The new model, MXWS-7700, is displayed in the Models and Groups panel.
13. Select the MXWS-7700 model and click the **Edit** icon on the Visual Modeler toolbar.
14. The Model Detail page is now displayed.

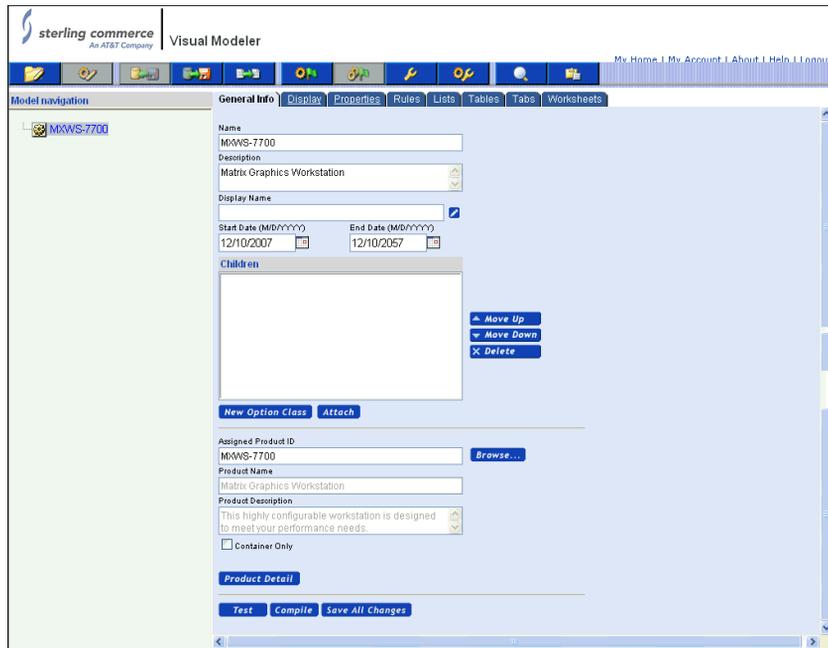


FIGURE 86. Visual Modeler Model Detail Page: General Info Tab

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

15. Click **New Option Class**.

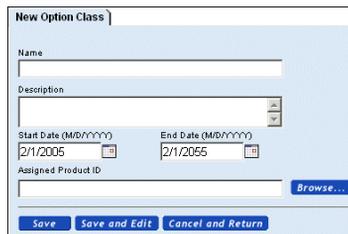


FIGURE 87. Visual Modeler Model Detail Page: New Option Class Tab

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

17. Click **Save**.

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

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

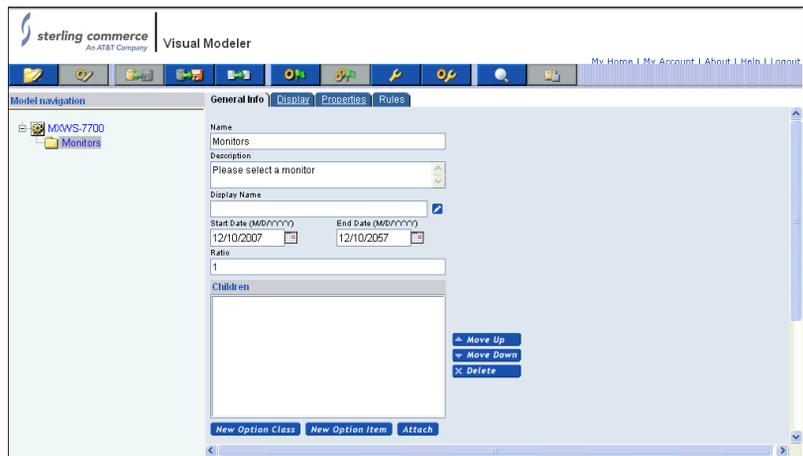


FIGURE 88. Visual Modeler Option Class Page: General Info Tab

19. Click **New Option Item**.

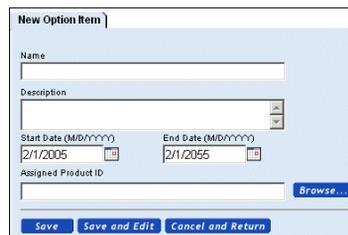


FIGURE 89. Visual Modeler Model Detail Page: New Option Item Tab

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

21. Click **Save**.

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

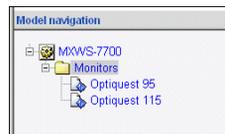


FIGURE 90. Model Navigation Tree

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

25. Click the **Compile and Test** icon on the Visual Modeler toolbar.

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

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

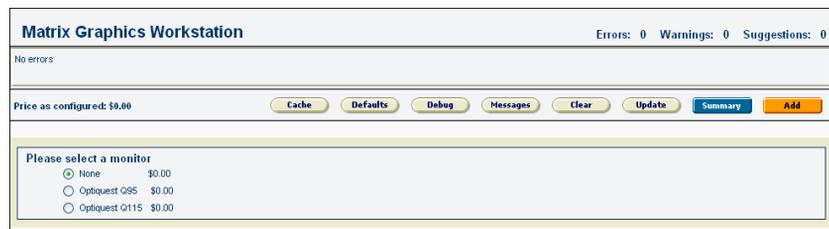


FIGURE 91. Visual Modeler Test Model Page

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

26. Close this window.

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

27. Click **My Home** to return to the Enterprise Home page.
28. In the Product manager, navigate to the Product Detail page for the MXWS-7700 product.
29. In the Component Type drop-down list, select Configurable.
30. Notice that in the Model drop-down list, “Computers/Workstations/MXWS-7700” is selected automatically.
31. Click **Save Changes**.

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

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

- "Properties" on page 107
- "UI Controls" on page 123

Properties

Most of the customer’s experience of configuring a product is determined by properties: these are attributes of the model, its option classes, and option items, and they are used to determine how rules fire, the behavior of the UI, and information that can be displayed to the user. The Sterling Multi-Channel Selling Solution provides a set of built-in properties that control the behavior of the Sterling Configurator and how the model is presented to the end-user. You can also define properties that the Configurator will use to ensure that the user’s product configuration choices make sense.

This section describes how to define and attach properties to a model. You define a property at the model group or model level, and you attach a property to a model, option class, or option item. The basic steps are:

1. Determine at what level to define and attach a property. Where you attach the property determines where you can use it: properties are available for use in the model group and model hierarchy beneath the point at which they are defined. For example, you may want to define a property, `MonitorSize`, at the

Monitors option class level so that it is available for use with each of the option items (types of monitors) in that option class.

2. Once you define the property, then you attach it at the appropriate level of the model hierarchy and, if appropriate, assign a value to it. For example, once you have defined the MonitorSize property, then you attach it to the option item defining a specific monitor and set the value representing the size of the monitor.

We will define properties at the model level for the monitors available with the MXWS-7700 Workstation product. Once the properties are defined, we will assign property values and attach them at the option item level.

Defining Properties for the MXWS-7700 Model

1. In the Visual Modeler, navigate to the Workstations level of the Model Group hierarchy.

MXWS-7700 displays in the Models and Groups panel.

2. Select MXWS-7700, then click the Edit Model icon in the Visual Modeler toolbar.

MXWS-7700 displays at the top of the Model Navigation panel, and the **General Info** tab for the model displays.

3. Click the **Properties** tab. The Properties page displays as shown in the following figure.

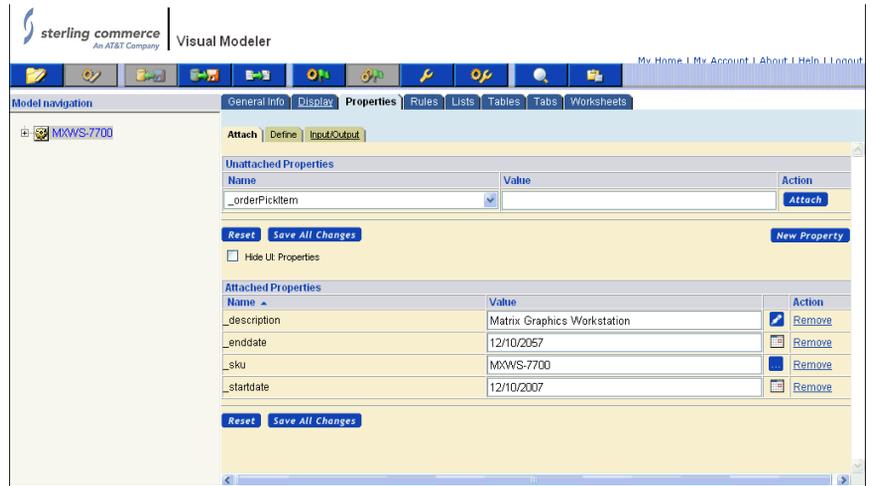


FIGURE 92. Visual Modeler Properties Page

4. Click the **Define** tab.

The Define Properties page displays, as shown in the following figure.



FIGURE 93. Visual Modeler Define Properties Page

5. Define the MXWS-7700 properties:
 - a. Enter the property name: MonitorSize.
 - b. Choose Number from the Type drop-down list.

c. Click Add.

The MonitorSize property displays in the Defined Properties list.

6. Add the rest of the MXWS-7700 model properties using the property names and types shown in the following table.

TABLE 25. MXWS-7700 Properties

Name	Type
MaximumResolution	String
MonitorWeight	Number
MaximumWeight	Number
RequiresXVGA	Number

When you have finished defining and adding the properties, the Define Properties page displays as shown in the following figure.

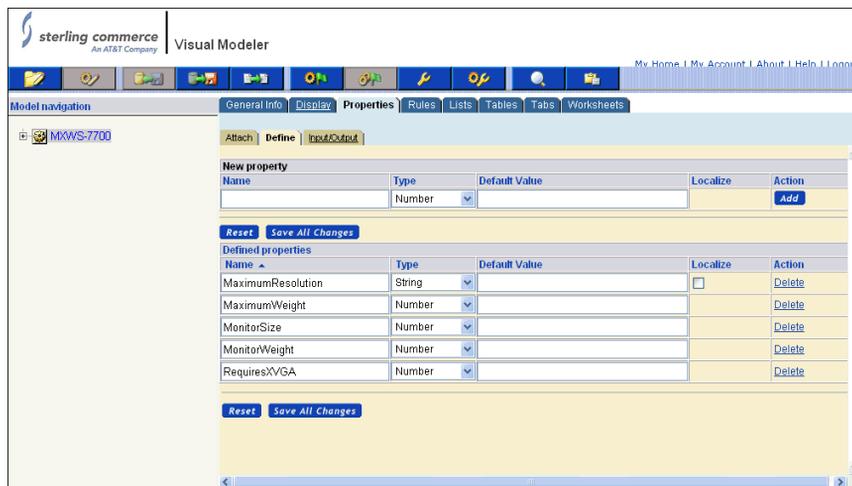


FIGURE 94. Visual Modeler Define Properties Page

7. Click Save All Changes.

The properties are now part of the MXWS-7700 model.

Attaching Properties

This section assumes that you are still editing the MXWS-7700 model in the Visual Modeler.

First, we will attach a property that applies to the entire model.

1. In the Model Navigation panel, click the MXWS-7700 link.

The General Info page displays.

2. Click the **Properties** tab.

The Properties page displays as shown in the following figure.

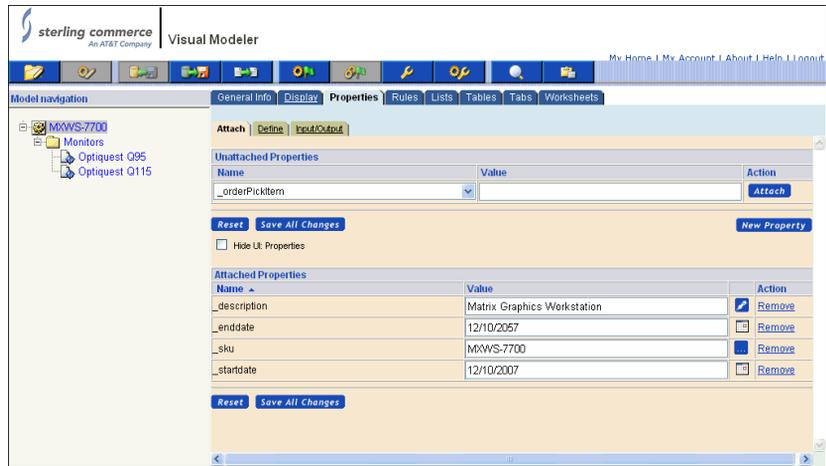


FIGURE 95. Visual Modeler MXWS-7700 Model Properties Page

Notice the two lists: Unattached Properties and Attached Properties.

3. Choose MaximumWeight from the Unattached Properties drop-down list.
4. Enter 0 for the property value.
5. Click Attach.

The MaximumWeight property displays in the Attached Properties list.

6. Click Save All Changes.

Next, we will attach the properties that apply to the option items for the Monitors option class.

1. In the Model Navigation panel, click the Optiquest Q95 link.
The **Properties** tab displays as shown in the following figure:

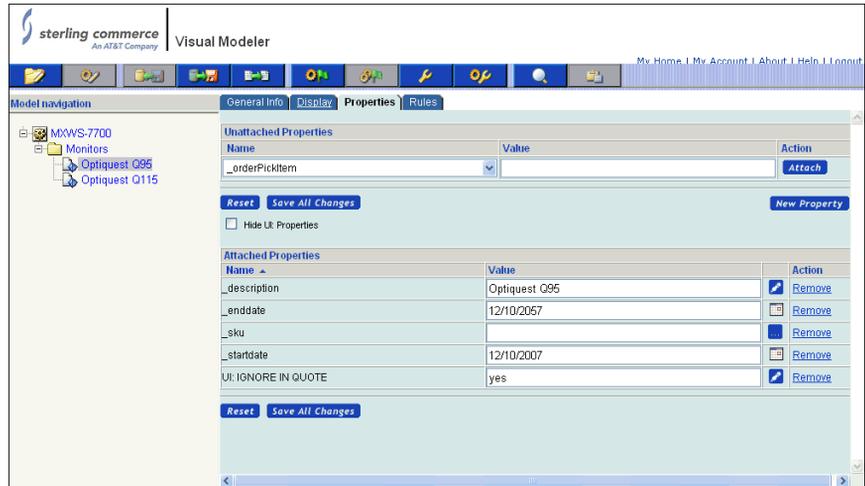


FIGURE 96. Visual Modeler Optiquest Q95 Properties Page

Notice the two lists: Unattached Properties and Attached Properties.

2. Choose MonitorSize from the Unattached Properties drop-down list.
3. Enter 19 in the Value field, then click Attach.

The MonitorSize property displays in the Attached Properties list.

Continue attaching properties to the option items as follows:

TABLE 26. Option Item Property Values

Option Item	Property	Value
Optiquest Q95	MonitorSize	19
	MaximumResolution	1024x768
	MonitorWeight	7.2
Optiquest Q115	MonitorSize	21
	MaximumResolution	1280x1024
	MonitorWeight	8.3

When you have finished attaching properties to each option item, click **Save All Changes**.

Rules

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

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

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

TABLE 27. Graphics Card Option Class

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

Define the Resolution property at the Graphics Cards level of the model hierarchy as follows:

1. In the Model navigation panel, click the MXWS-7700 link.
The **General Info** tab displays.
2. Click New Option Class.
The New Option Class page displays.
3. Enter Graphics Cards in the Name field and in the Description field.
4. Click Save and Edit.
The **General Info** tab for the new Graphics Cards option class displays.
5. Click the **Properties** tab.
The **Properties** tab displays.

6. Click New Property.

The Define New Property pop-up window appears, as shown in the following figure.

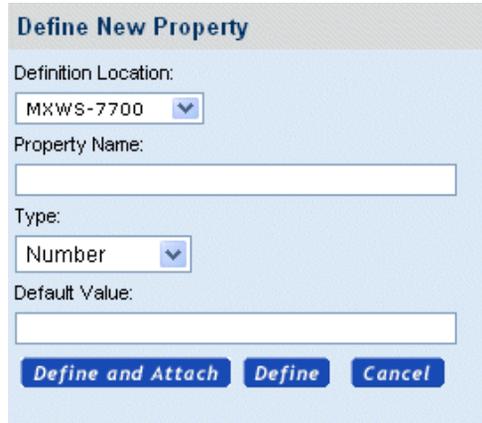
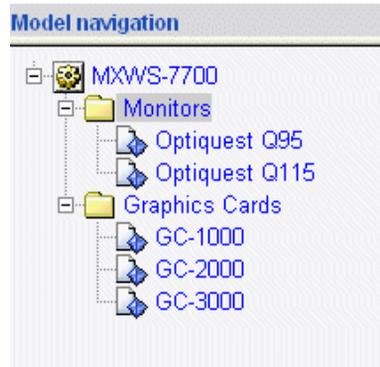


FIGURE 97. Visual Modeler Define New Property Pop-Up Window

7. Choose Model Groups from the Definition Location drop-down list.
8. Enter Resolution for the Property Name.
9. Choose String from the Type drop-down list.
10. Click Define.

Define the three new option items and attach the Resolution property to them using the values in the table "Graphics Card Option Class" on page 113. Define the option items as described in "Create the Model" on page 102 and attach the Resolution property as described in "Attaching Properties" on page 111. Be sure to click Save All Changes as you complete each step. When you are finished, the Model navigation panel displays as shown in the following figure.



In the Model navigation panel, click the Graphics Cards link, then click the **Display** tab. Choose Invisible from the Option Class Display drop-down list, then click Save All Changes.

On the Monitors option class, create a new property as follows:

TABLE 28. IsPicked Property Definition

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

Creating a Rule

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

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

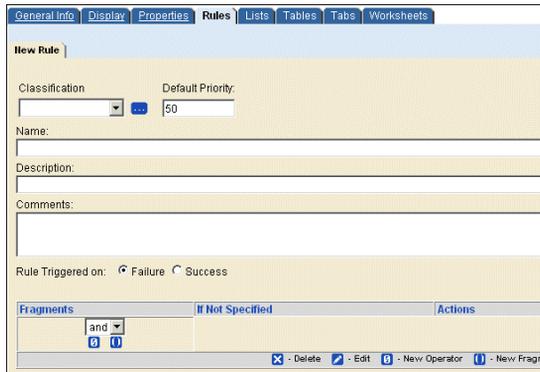


FIGURE 98. Model Detail Page: New Rule Tab

5. Enter the following information:
 - a. Name: Display Graphics Card
 - b. Description: Display the Graphics Card option class if a monitor is selected.
6. Select Rule Triggered on: Success.
7. Click **Save and Edit**.
8. Click the New Fragment icon.
The New Fragment page displays.
9. Define the fragment:
 - a. Choose value from the Function1 drop-down list.
 - b. Choose IsPicked from the Property1 drop-down list.
 - c. Choose = from the Operator drop-down list.
 - d. Choose literal from the Function2 drop-down list.
 - e. Enter 1 in the Property2 drop-down list.
 - f. Choose Rule is false from the If not specified drop-down list.
10. Click **Save and Return**.

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

11. In the Assignment Actions panel, select `_isVisibleable` property from the drop-down list.
12. Enter 1 for the Value.
13. Click the ... button next to the Assign To field, and in the pop-up window, navigate to the Graphics Card option class. Select it and click **Done**.
The Assign To field is populated with the value `*.Graphics Cards`.

14. Click **Add Item**.
15. Click **Save**.

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

16. Select the Model MXWS-7700 from the navigation panel, and click the **Rules** tab.
17. On the **Attach** sub-tab, select the Display Graphics Card rule from the drop-down list, and click **Attach**.
18. Click **Save All Changes**.

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

Using Rules to Control Display of Option Items

You can use assignment actions to control the display of option items: this gives you the ability to ensure that customers only make valid selections. In "Creating a Constraint Table" on page 121 we demonstrate an alternate approach using constraint tables. In this section, we use a rule with an assignment action to ensure that a customer will only pick valid combinations of graphics cards and monitors.

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

1. Navigate to the model MXWS-7700.
2. Click the Rules tab.
3. Click the Define sub-tab.
4. Click **New...**
5. Enter the following information:

-
- a. Name: Display Compatible Graphics Cards
 - b. Description: This rule ensures that only graphics cards that support each monitor are displayed.
6. Select Rule Triggered on: Success.
 7. Click **Save and Edit**.
 8. Click the **New Fragment** icon.
 9. Specify the fragment as follows:
 - a. Choose value from the Function1 drop-down list.
 - b. Choose MaximumResolution from the Property1 drop-down list.
 - c. Choose = from the Operator drop-down list.
 - d. Choose literal from the Function2 drop-down list.
 - e. Enter 1280x1024 in the Property2 field.

Specifying the fragment in this way is equivalent to the following formula:
`value(Maximum Resolution) = literal(1280 x 1024)`

 - f. Choose Rule is false from the If not specified drop-down list.
 10. Click **Save and Return**.

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

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

The Assign To field is populated with the value “MXWS-7700”.
14. Click Add Item.
15. Click **Save**.
16. Now attach this rule to the model.

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

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

1. Navigate to the model MXWS-7700.
2. Click the Rules tab.
3. Click the Define sub-tab.
4. Click **New...**
5. Enter the following information:
 - a. Name: Display if Support XVGA
 - b. Description: Display this card if XVGA support is required and the card supports XVGA.
6. Select Rule Triggered on: Failure.
7. Click **Save and Edit**.
8. Click the New Fragment icon.
9. Specify the fragment as follows:
 - a. Choose value from the Function1 drop-down list.
 - b. Choose RequiresXVGA from the Property1 drop-down list.
 - c. Choose = from the Operator drop-down list.
 - d. Choose literal from the Function2 drop-down list.
 - e. Enter 1 in the Property2 field.

Specifying the fragment in this way is equivalent to the following formula:
`value(RequiresXVGA) = literal(1) in any location`

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

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

11. Click **Save and Return**.
12. Click the New Fragment icon.
13. Specify the fragment as follows:
 - a. Choose propval from the Function1 drop-down list.
 - b. Choose Resolution from the Property1 drop-down list.

-
- c. Choose = from the Operator drop-down list.
 - d. Choose literal from the Function2 drop-down list.
 - e. Enter XVGA in the Property2 field.

Specifying the fragment in this way is equivalent to the following formula:
`propval(Resolution) = literal(XVGA) in any location`

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

14. Set **If not specified** to Rule is true.
15. Click **Save and Return**.
16. In the Assignment Actions panel, select `_isVisibleable` property from the drop-down list.
17. Enter 0 for the Value.
18. Leave the Assign To field value blank. This is to indicate that the property is at the node at which the rule is attached.
19. Click Add Item.
20. Click **Save**.
21. Now attach this rule to the each graphics card.

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

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

This ensures that this rule will fire first.

26. Click Save All Changes.

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

be selected. If you select the Optquest Q115 monitor, then the GC-1000 graphics card is not displayed.

In the next section, "Creating a Constraint Table" on page 121, you will create a table which constrains which option items are compatible with each other. Before proceeding to the next section, remove the rule Display if Support XVGA from each of the graphics cards.

Creating a Constraint Table

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

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

TABLE 29. Compatible Selections From Graphics Cards and Monitors

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

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

1. Navigate to the model MXWS-7700.
2. Click the Tables tab.
3. Click **New...**
4. Enter the following information:
 - a. Name: Graphics
 - b. Description: Constrains the selection of graphics cards and monitors.
 - c. Message: You cannot select this combination of graphics card and monitor.
5. Click **Save Changes**.
6. Click the Records tab.

7. Select Monitors from the Table Column Name drop-down list and click **Add**.
8. Select Graphics Cards from the Table Column Name drop-down list and click **Add**.

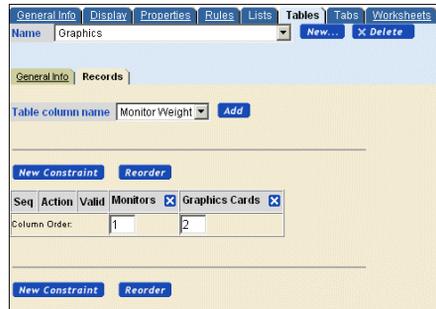


FIGURE 99. Model Detail Page: Tables Tab and Records Sub-Tab

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

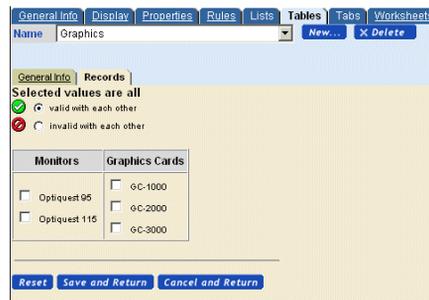


FIGURE 100. Model Detail Page: Tables Tab and Records Sub-Tab

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

Now compile and test the model. You see that the Graphics Card option class is hidden until you select the Optiquet Q115 monitor, and then it is displayed so that a graphics card can be selected. You see that the GC-1000 option item is displayed

with a clickable icon that indicates that it should not be selected. If you do select it, then an error message is displayed. You can click the icon to ask the Sterling Multi-Channel Selling Solution to help resolve the conflict: in this case, it will suggest an alternate selection of monitor.

UI Controls

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

- "Display Properties" on page 123
- "Tabular Displays" on page 124
- "User-Entered Values" on page 128
- "Images" on page 131

Display Properties

Each model, option class, and option item has a set of properties that determine how the configurable product will be displayed to the customer: these are known as display properties. A complete description of the display properties are provided in the *Sterling Multi-Channel Selling Solution Administration Guide*. Every display property corresponds to a UI property as indicated below.

Pre-Pick Guiding Text

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

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

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

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

Ignore in Quote

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

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

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

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

Tabular Displays

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

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

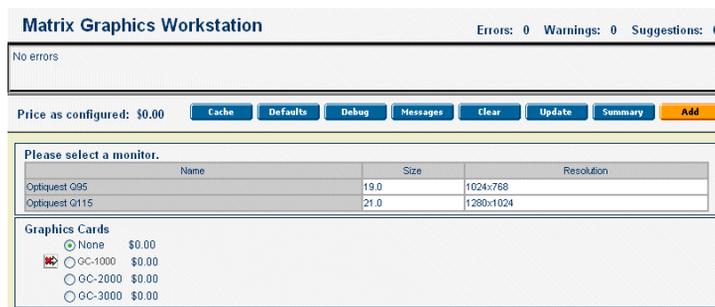


FIGURE 101. Tabular Display of Properties

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

Calculated Property Values

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

1. Navigate to the Monitors option class.
2. Define a numeric property called Monitor Area.
3. Attach this property to the two monitors.
4. Navigate to the Monitors option class.
5. Click the Display tab.
6. Change the table column properties as follows:
 - a. Column Headings: Size;Area;Resolution
 - b. Column Properties: MonitorSize;MonitorArea;MaximumResolution
 - c. Column Alignment: Left;Left;Left
7. Click **Save All Changes**.
8. Navigate to the model node.
9. Click the **Worksheets** tab, and then create a worksheet as follows:

10. Click **New...**
11. Enter the following information:
 - a. Name: Calculate Area
 - b. Click **Create**.
12. Click **Add Column** and add first Monitor Size and then Monitor Area.
13. Click Add Row and, using the entity picker, add the monitor option items.
14. In the first row and Monitor Area column, click the Edit Property Value button.

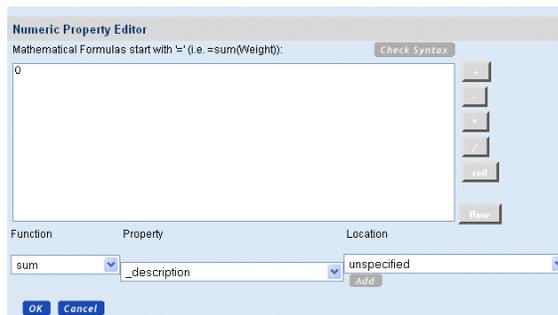


FIGURE 102. Numeric Property Editor Window

15. Enter “=” as the first character in the text area.
16. In the Numeric Property Editor window, select the Function value, MonitorSize Property, and the unspecified Location and click **Add**.
17. Click * from the mathematical symbols along the side.
18. In the Numeric Property Editor window, select the Function value, MonitorSize Property, and the unspecified Location and click **Add**.
19. Click / from the mathematical symbols along the side.
20. Enter 2.

You should see the following in the text area:

```
value("Monitor Size")*value("Monitor Size")/2
```
21. Click **OK**.
22. In the second row and Monitor Area column, click the Edit Property Value button and repeat the steps above for this monitor.

23. Click **Save All Changes**.

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

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

You can modify the Monitor Area property formula to read:

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

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

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

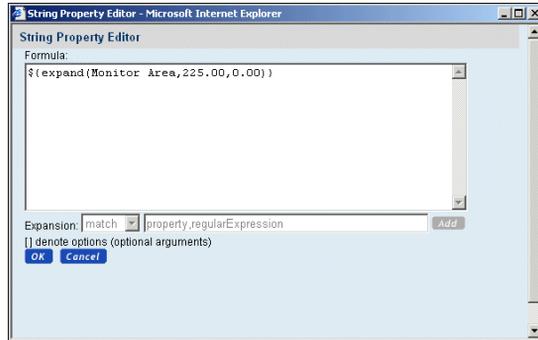


FIGURE 103. String Property Editor Window

6. Enter “`${expand(Monitor Area,225.00,0.00)}`” in the text area.
7. Click **OK**.

-
8. Now navigate to the Column Properties field on the Monitors class Display tab, and change it to:

`MonitorSize;MonitorAreaString;MaximumResolution`

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

User-Entered Values

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

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

1. Create an option class called MonitorWeight.
2. On its Display tab, select User Entered Values from the UI Control drop-down list.
3. Set the Number of Columns display property to 2.
4. Click **Save All Changes**.
5. Create a single option item below this option class: call it Weight.
6. On the Display tab for Weight, in the User Entered Value Settings section, enter:
 - a. For the User Entered Value Type, select Numeric
 - b. Assign Value to Property: *.MaximumWeight
This references the MaximumWeight property which is attached at the model level.
 - c. Text before Entry Field: Enter the maximum weight for the monitor in kg.
7. Click Save All Changes.

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

**FIGURE 104. User Entered Value Option Class**

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

8. Navigate to the Model level, and then create the following rule:
 - Name: Maximum Weight at Model
 - Triggered on: Failure
 - Fragment: In Function1, select value, MonitorWeight, any from the drop-down lists, select ">" from the Operator drop-down list, and in Function2, select value, MaximumWeight, relative, and select Rule is true from the If not specified drop-down list, so that the rule reads:

`value(MonitorWeight) > value(.MaximumWeight)`
 - Error message: The selected monitor exceeds your specified maximum weight.
9. Save this rule.
10. Attach this rule at the MXWS-7700 node.

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

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

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

1. Detach the rule Maximum Weight at Model rule from the model, so that it does not participate in the rule firing process.
2. Create the following rule:

-
- Name: Maximum Weight at Monitor
 - Triggered on: Failure
 - Fragment: In Function1, select value, MonitorWeight, relative from the Location1 drop-down list, select ">" from the Operator drop-down list, and in Function2, select value, MaximumWeight, relative, and select Rule is true from the If not specified drop-down list, so that the rule reads:

value(.MonitorWeight) > value(.MaximumWeight)
 - Error message: The selected monitor exceeds your specified maximum weight.
3. Save this rule.
 4. Attach this rule at the monitor option item nodes.

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

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

Before proceeding with this lesson, detach the Maximum Weight at Monitor rule from the Monitor option items.

Restricting User Entered Values

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

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

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

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

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

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

Images

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

- If you begin the URL with "http://", then the URL is assumed to be absolute;
- If you begin the URL with "/", then the URL is interpreted relative to the servlet container;

- If you begin the URL without either, then the URL is interpreted relative to the current URL.

TABLE 30.

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

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

Layout Management

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

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

First, create new option classes as follows:

TABLE 31. Processors Option Class

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

TABLE 32. RAM Option Class

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

TABLE 33. Keyboards Option Class

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

Now manage the layout of the configurable product as follows:

1. Navigate to the MXWS-7700 model.
2. On the Display tab, set the Number of Columns property to 3. This is equivalent to setting the UI: NUMBER OF COLUMNS property to 3.
3. Navigate to the Monitors option class.
4. On the Display tab, set the Number of Columns property to 3. This is equivalent to setting the UI: NUMBER OF COLUMNS property to 3.
5. Navigate to the Graphics Cards option class.
6. On the Display tab, set the Number of Columns property to 1.
7. Navigate to the MonitorWeight option class.
8. On the Display tab, set the Option Class Display to Invisible.
9. Navigate to the Processors option class.
10. On the Display tab, set the Number of Columns property to 1.
11. On the Properties tab, enter Processors in the value field of the `_description` property.
12. Navigate to the RAM option class.
13. On the Display tab, set the Number of Columns property to 1.
14. On the Properties tab, enter RAM in the value field of the `_description` property.
15. Navigate to the Keyboards option class.
16. On the Display tab, set the Number of Columns property to 1.
17. On the Properties tab, enter Keyboards in the value field of the `_description` property.

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

Matrix Graphics Workstation Errors: 0 Warnings: 0 Suggestions: 0

No errors

Price as configured: \$0.00

Please select a monitor.

Name	Size	Area	Resolution
Optiquest G95	19.0	180.5	1024x768
Optiquest G115	21.0	220.5	1280x1024

Graphics Cards	Processors	RAM
<input checked="" type="radio"/> None \$0.00 <input type="radio"/> GC-1000 \$0.00 <input type="radio"/> GC-2000 \$0.00 <input type="radio"/> GC-3000 \$0.00	<input checked="" type="radio"/> None \$0.00 <input type="radio"/> Pentium 4 2.8 GHz \$0.00 <input type="radio"/> Pentium 4 2.8A GHz \$0.00 <input type="radio"/> Pentium 4 2.8C GHz \$0.00	<input checked="" type="radio"/> None \$0.00 <input type="radio"/> SDRAM 256MB \$0.00 <input type="radio"/> DDR 256MB \$0.00 <input type="radio"/> RDRAM 256MB \$0.00

Keyboards
<input checked="" type="radio"/> None \$0.00 <input type="radio"/> Logitech 967300 \$0.00 <input type="radio"/> Gyration GP170 \$0.00 <input type="radio"/> Adesso 595 \$0.00

FIGURE 105. Three-Column Layout

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

18. Navigate to the Graphics Cards option class.
19. On the Display tab, set the Number of Rows property to 2. This is equivalent to setting the UI: ROW SPAN property to 2.
20. Navigate to the Processors option class.
21. On the Display tab, set the Number of Columns property to 2.

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

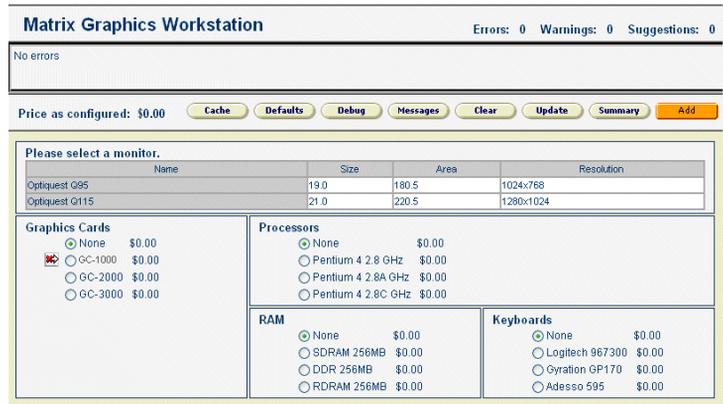


FIGURE 106. Revised Three-Column Layout

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

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

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

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

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

No errors

Price as configured: \$899.00 Lead Time: 0.0 day(s)

Monitors

None \$0.00
 Optiquest Q95 \$0.00
 Optiquest Q115 \$0.00

Graphics Cards

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

Processors

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

RAM

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

Keyboards

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

Case

Please enter a color:

FIGURE 107. Revised Three-Column Layout with Skipped Column

Creating Wish Lists, Templates, and Registries

Now that you have created a number of enterprise users with the appropriate functions to perform their tasks, and you have created products for the product catalog, you can create lists of items, such as wish lists, templates, and gift registries.

Customers and partner employees can purchase items by directly adding them from the product catalog to a cart or selecting them from a wish list template, or registry, and then adding them to a cart.

In this lesson, you will create a wish list, a template, and a registry.

For this part of the lesson, you will log in as the **hfortuna** user (password: hfortuna) you created as a partner user for Bellisima in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users".

Creating Wish Lists

1. From the Matrix Home Page, log in as **hfortuna** (password: **hfortuna**).
Hal Fortuna's home page displays.

MATRIX Solutions powered by sterling commerce

My Home | My Account | Account Activity | Registries | My Wish List | My Template | Logout

All Categories: Computers Product Advisor

Welcome Hal Fortuna

Browse

Categories

Computers (7)
Desktops (5)
Workstations (2)

Product Search

Advanced Search Search

Advanced Search

Commerce Tasks

- For special pricing select customer type: General and select a currency: USD
- Update your Organization Profile
- Update User Accounts

Orders			
Sales Order #	Purchase Order #	Last Modified	Overall Status
None			
Advanced Search			

Carts		
Cart ID	Cart Name	Last Modified
None		
Advanced Search		

Quotes			
Quote ID	Name	Last Modified	Status
None			
Advanced Search			

Service Contracts			
Contract ID	Name	Last Modified	Status
None			
Advanced Search			

Sales Contracts			
Contract ID	Name	End Date	Status
None			
Advanced Search			

Invoices			
Invoice #	Ref Order/Invoice #	Due Date	Status
None			
Advanced Search			

Returns			
Return #	RMA #	Order #	Status
None			
Advanced Search			

Routed Carts			
Cart ID	Cart Name	Sent to	Date Sent
None			

Transaction Search	
<input checked="" type="radio"/> Orders	<input type="radio"/> Quotes
with SalesOrder #	<input type="text" value=""/> <input type="button" value="GO"/>

Wish Lists		
Wish List Name	Last Modified	Date Created
Wish List	12/10/2007	12/10/2007
None		
Advanced Search		

Registries				
Registry Id	Event date	Event location	Last Modified	Date Created
None				
Advanced Search				

Templates			
Template Name	Reminder Date	Last Modified	Date Created
Template	None	12/10/2007	12/10/2007
None			
Advanced Search			

FIGURE 108. Partner User Home Page

- Click the **Account Activity** link on the top right corner of the page.
The workspace page displays.

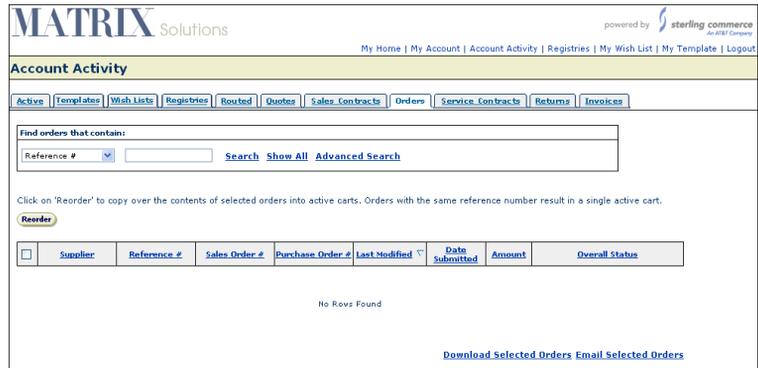


FIGURE 109. Workspace Page

3. Click the **Wish Lists** tab.

The Wish Lists page displays as shown in the following figure.

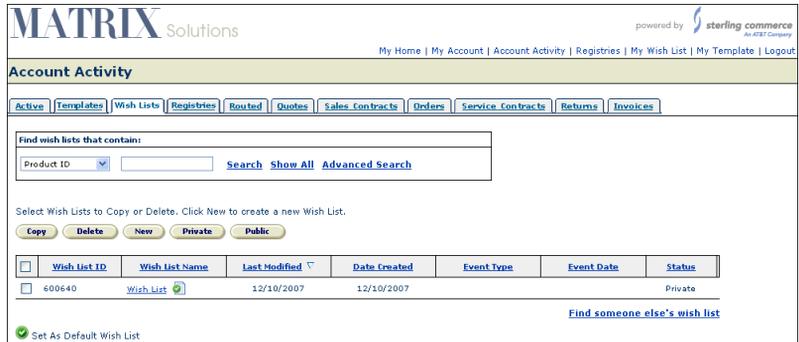


FIGURE 110. Wish List Page

4. Click the **New** button.

The Wish List page re-displays with a new panel.

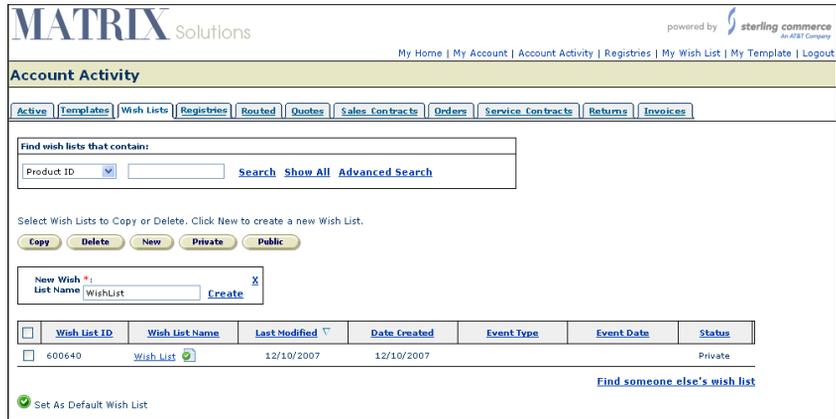


FIGURE 111. Wish List Page with Create Wish List panel

5. Enter Hal's Wish List in the New Wish List Name field and click **Create**.
The Wish List Detail page displays.



FIGURE 112. Wish List Detail Page

Now we will add the Matrix 7510 Desktop (Product ID: MXDS-7510) that you created in LESSON 2, "Creating Simple Products" to this wish list.

- Under the Catalog Search panel, enter MXDS-7510 and click **Go**.
The Product Catalog page for MXDS-7510 displays as shown in the following figure.

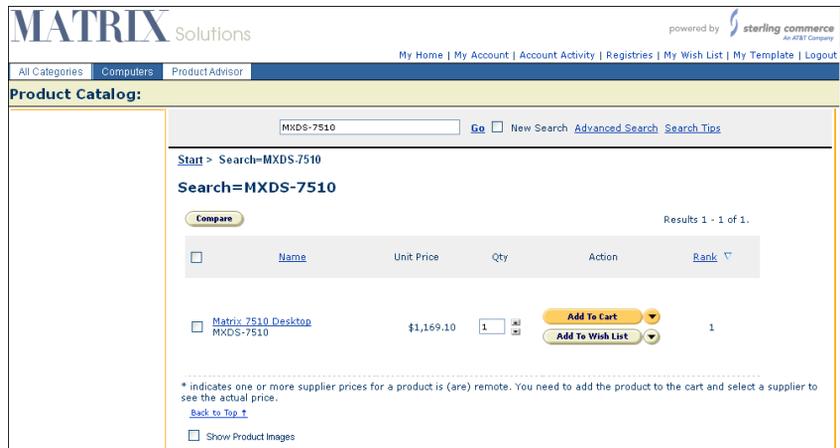


FIGURE 113. Product Catalog Page

- Click the down arrow next to the **Add to Wishlist** button.
A pop-up displays as shown in the following figure.

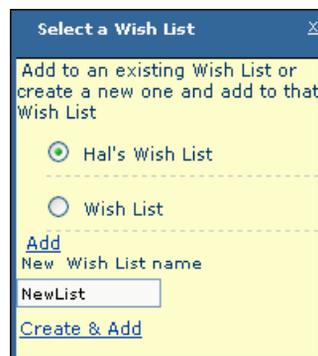


FIGURE 114. Select Wish List Pop-Up

- Select Hal's Wish List and click **Add**.

Now let us check if the product has been added to Hal's Wish List.

- Click the **Account Activity** link. On the workspace page that displays, click the **Wish Lists** tab. Click the **Hal's Wish List** link to view the details of the wish list. Notice that Matrix 7510 Desktop appears in Hal's Wish List as shown in the following figure.

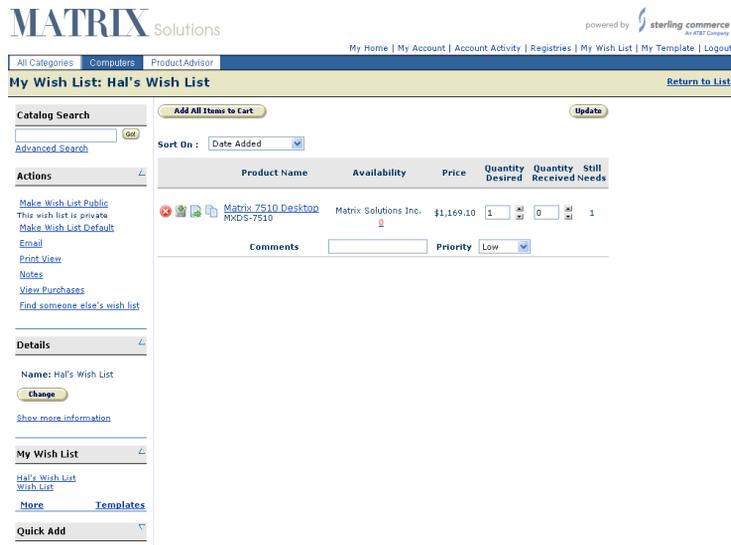


FIGURE 115. Wish List Detail with Product

Notice the **Make Wish List Public** link under the **Actions** panel. You can click this link to change the status of the wish list from Private to Public. For more information about the tasks you can perform on this page, see the *Sterling Multi-Channel Selling Solution Administration Guide*.

Exercises

Create a wish list (Wish List Name: Jane's Birthday Wish List) for the **jspencer** user you created in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users" and add the Matrix 7490 Desktop (Product ID: MXDS-7490) to the wish list.

When you complete this exercise, Jane's Birthday Wish List Detail page appears as shown in the following figure.

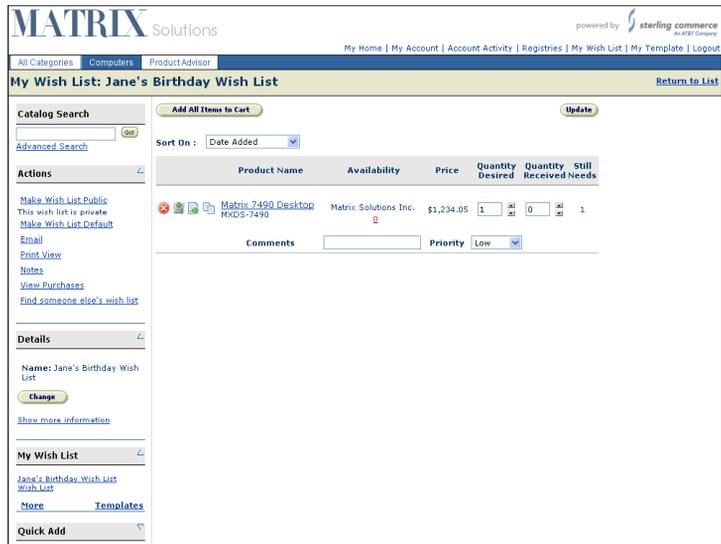


FIGURE 116. Jane's Birthday Wish List

Creating Templates

1. From the Matrix Home Page, log in as **hfortuna** (password: **hfortuna**).
2. Click the **Account Activity** link on the top right corner of the page.
3. On the workspace page that displays, click the **Templates** tab.

The Templates page displays.

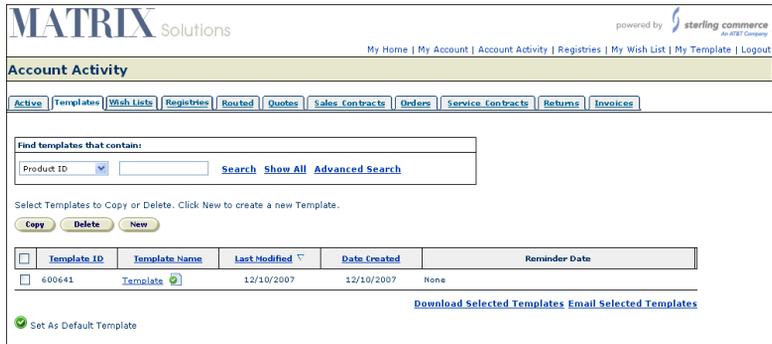


FIGURE 117. Templates Page

4. Click the **New** button.

The Template page re-displays with a new panel.

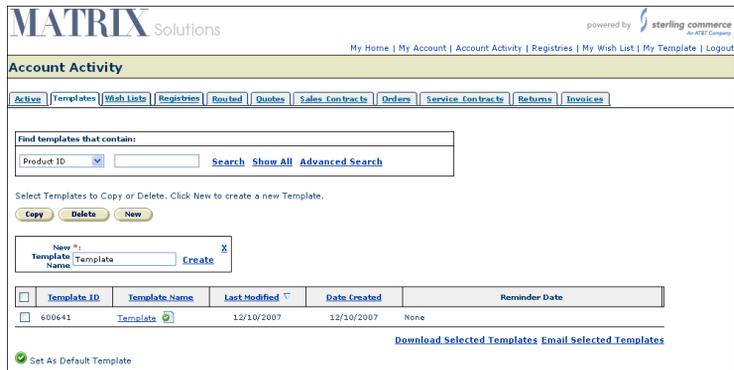


FIGURE 118. Template Page with Create Template Panel

5. Enter Hal's Template in the New Template Name field and click **Create**.

The Template Detail page displays as shown in the following figure.

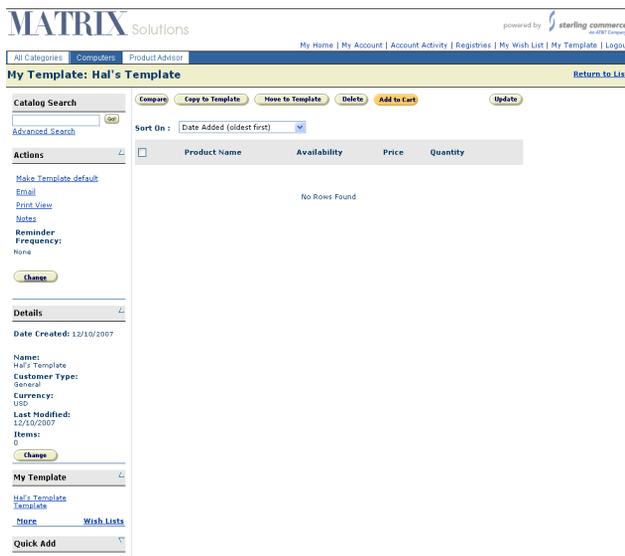


FIGURE 119. Template Detail Page

Now we will add the Matrix 7510 Desktop (Product ID: MXDS-7510) that you created in LESSON 2, "Creating Simple Products" to this template.

6. Under the Catalog Search panel, enter MXDS-7510 and click **Go**.

The Product Catalog page for MXDS-7510 displays as shown in the following figure.

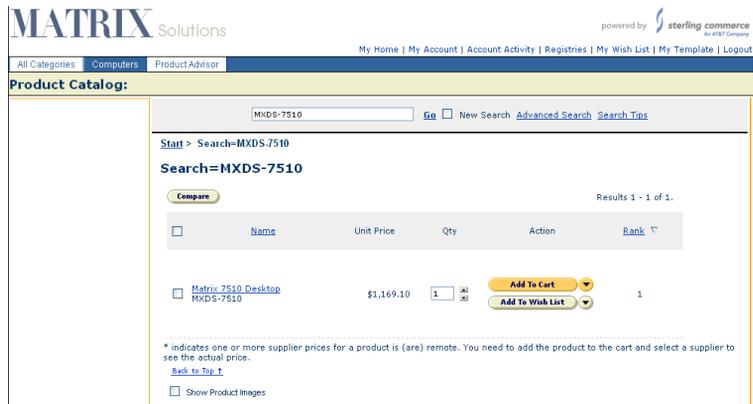


FIGURE 120. Product Catalog Page

7. Click the **Matrix 7510 Desktop** link.

The Product Detail page displays as shown in the following figure.

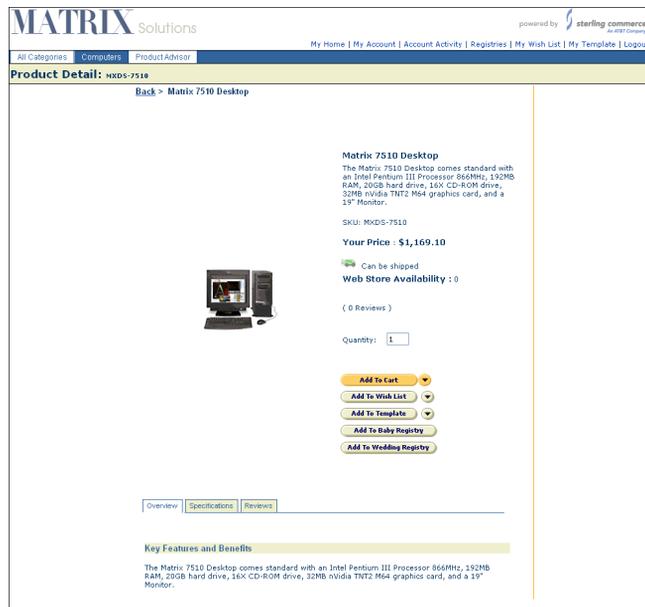


FIGURE 121. Product Detail Page

- Click the down arrow next to the **Add to Template** button.
A pop-up displays as shown in the following figure.



FIGURE 122. Select Template Pop-Up

- Select Hal's Template and click **Add**.

Now let us check if the product has been added to Hal's Template.

- Click the **Account Activity** link. On the workspace page that displays, click the **Templates** tab. Click the **Hal's Template** link to view the details of the template. Notice that Matrix 7510 Desktop appears in Hal's Template as shown in the following figure.

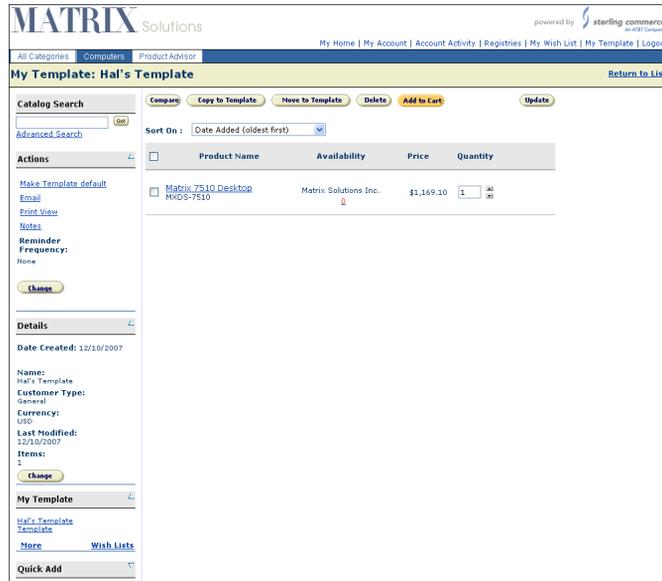


FIGURE 123. Template Detail with Product

Exercises

Create a template (Template Name: Jane's Monthly Purchases Template) for the **jspencer** user you created in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users" and add the Matrix 7490 Desktop (Product ID: MXDS-7490) to the template.

When you complete this exercise, Jane's Monthly Purchases Template Detail page appears as shown in the following figure.

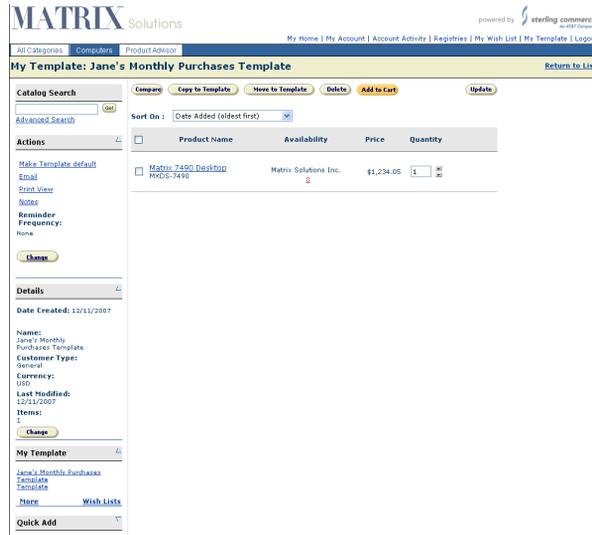


FIGURE 124. Jane's Monthly Purchases Template Detail Page

Creating Registries

Registries are of two types: baby registry and wedding registry. For the purpose of this tutorial, you will create a wedding registry.

1. From the Matrix Home Page, log in as **hfortuna** (password: **hfortuna**).
2. Click the **Account Activity** link on the top right corner of the page.
3. On the workspace page that displays, click the **Registries** tab.

The Registries page displays as shown in the following figure.

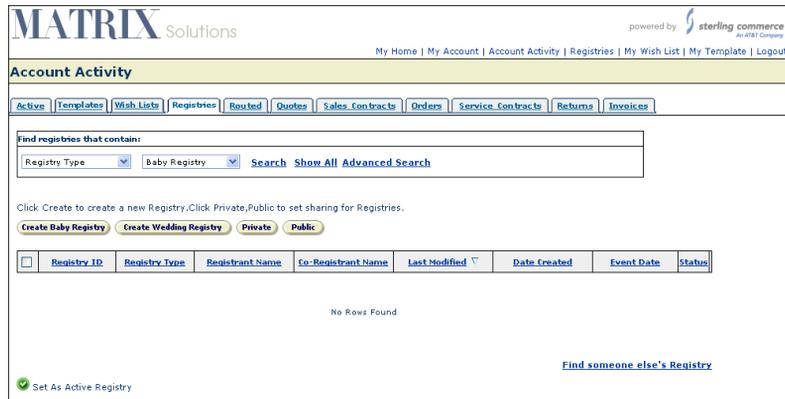


FIGURE 125. Registries Page

4. Click the **Create Wedding Registry** button.

The Event Details page displays as shown in the following figure.

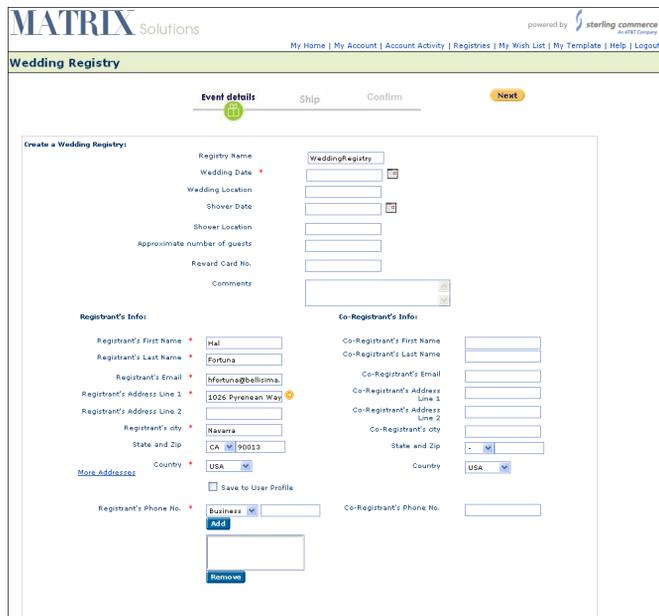


FIGURE 126. Event Details Page

5. In the Wedding Date field, click the calendar icon and select a wedding date (one month from the current date).
6. In the Registrant's Phone No. field, enter (408) 555-1214, and click **Add**.
Notice that most of the registrant's information has been filled out by default: the registrant information shown here is derived from the User Profile and the Partner Profile.
7. Click **Next**.

The Shipping Information page displays as shown in the following figure.

The screenshot shows the 'Shipping Information' page in the MATRIX Solutions interface. At the top, there's a navigation bar with 'My Home | My Account | Account Activity | Registries | My Wish List | My Template | Logout' and a 'powered by sterling commerce' logo. Below the navigation bar, the page title is 'Shipping Information'. A progress bar shows 'Event details', 'Ship' (selected), and 'Confirm'. A 'Next' button is visible in the top right. The main content area has a heading 'Enter/Select Your Shipping address: If you set a default address in your profile, then that address has been populated for you automatically. If you want to use this address, just press 'Next'. You may enter a new address by typing one below, or by selecting an address from your address book. To select an address from the list, click the 'arrow' button to the right of the address. To see more addresses from your address book, click the 'More' link.' Below this, there are two address sections: 'Current Address' and 'Future Address'. Each section has a list of addresses on the left and a form on the right. The 'Current Address' form has fields for Title (Mr.), Last name, First name, Address Line 1 (1028 Pyrenean Way), Address Line 2, City (Navarra), State and Zip (CA 90013), and Country (USA). There is a checkbox for 'Save To User Profile'. The 'Future Address' form has a checkbox for 'No future address' (checked), a Start Date field, and fields for Title (Mr.), Last name, First name, Address Line 1, Address Line 2, City, State and Zip, and Country (USA). There is also a checkbox for 'Save To User Profile'.

FIGURE 127. Shipping Information Page

8. Click **Next**.

The Registry Confirmation Page displays as shown in the following figure.



FIGURE 128. Registry Confirmation Page

Now we will add an item to the wedding registry.

9. Click the **Add Items to my registry** button.

The Registry Detail page displays as shown in the following figure.

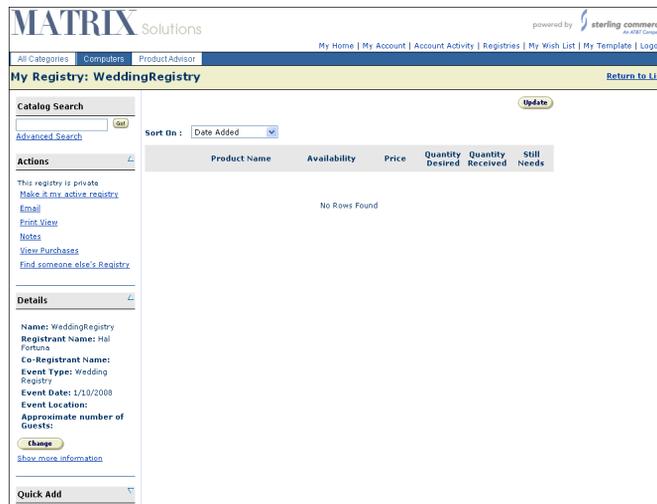


FIGURE 129. Registry Detail Page

Notice that there are no items in the wedding registry.

10. In the **Catalog Search** panel on the top left corner of the page, enter MXDS-7510 and click **Go**.

The Catalog Search Results page displays as shown in the following figure.

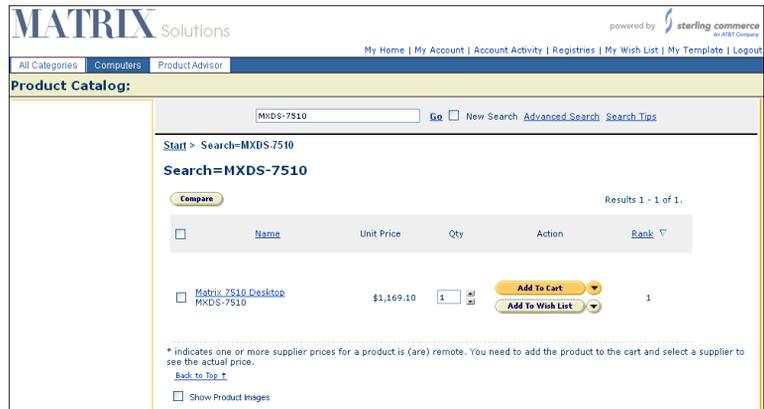


FIGURE 130. Catalog Search Results Page

11. Click the **Matrix 7510 Desktop** link.

The Product Detail page displays as shown in the following figure.

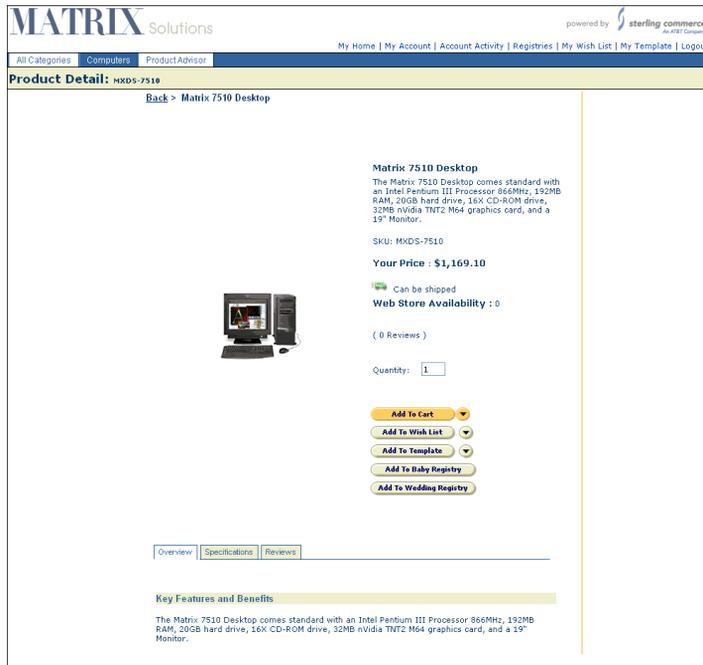


FIGURE 131. Product Detail Page

12. Click the **Add to Wedding Registry** button.

A pop-up displays as shown in the following figure.



FIGURE 132. Select Wedding Registry Pop-Up

13. Select the radio button next to **WeddingRegistry**, and click **Add**.

Now let us check if the product has been added to Hal's wedding registry.

14. Click the **Account Activity** link. On the workspace page that displays, click the **Registries** tab. Click the **Registry ID** link to view the details of the registry. Notice that Matrix 7510 Desktop appears in the wedding registry as shown in the following figure.

The screenshot shows the 'My Registry: WeddingRegistry' page. The header includes the Matrix Solutions logo and navigation links. The main content area features a search bar, a table of registry items, and a details section. The table lists the product 'Matrix 7510 Desktop' with a price of \$1,169.10 and a quantity of 1. The details section includes the registrant name 'Hal Fortuna', the event date '1/10/2008', and the event location.

Product Name	Availability	Price	Quantity Desired	Quantity Received	Still Needs
Matrix 7510 Desktop MXDS-7510		\$1,169.10	1	0	1

FIGURE 133. Wedding Registry Detail with Product

Exercises

Create a wedding registry for the **jspencer** user you created in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users" and add the Matrix 7490 Desktop (Product ID: MXDS-7490) to the wedding registry. Use the following information:

- Wedding Name: Jane's Wedding Registry
- Wedding Date: Choose a date one month from the current date
- Registrant's Phone No.: (408) 555-1214.

When you complete this exercise, Jane's Wedding Registry Detail page appears as shown in the following figure.

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My Home | My Account | Account Activity | Registries | My Wish List | My Template | Logout

My Registry: Jane's Wedding Registry [Return to List](#)

Catalog Search

[Advanced Search](#)

Actions

This registry is private
[Make it my active registry](#)
[Email](#)
[Print View](#)
[Notes](#)
[View Purchases](#)
[Find someone else's Registry](#)

Details

Name: Jane's Wedding Registry
 Registrant Name: Jane Spencer
 Co-Registrant Name:
 Event Type: Wedding Registry
 Event Date: 1/10/2008
 Event Location:
 Approximate number of Guests:

[Show more information](#)

Quick Add

Sort On : ▼

Product Name	Availability	Price	Quantity Desired	Quantity Received	Still Needs
 Matrix 7490 Desktop MXDS-7490	Matrix Solutions Inc.	\$1,234.05	<input type="text" value="1"/> <input type="button" value="up"/> <input type="button" value="down"/>	<input type="text" value="0"/> <input type="button" value="up"/> <input type="button" value="down"/>	1

Comments: Priority: ▼

FIGURE 134. Jane's Wedding Registry Detail Page

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

- End-User Experience

End-User Experience

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

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

This displays the end-user home page.

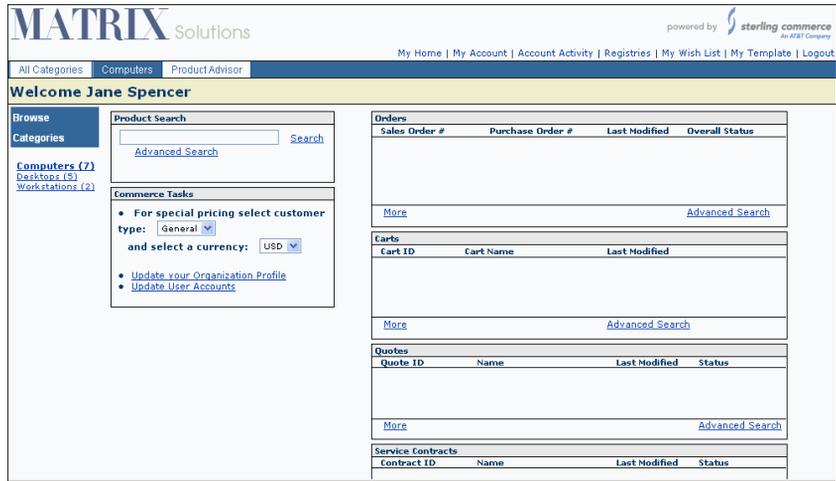


FIGURE 135. End-User Home Page

2. Browse the product catalog: click the **Computers** tab.
3. Find and click **Workstations**.

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

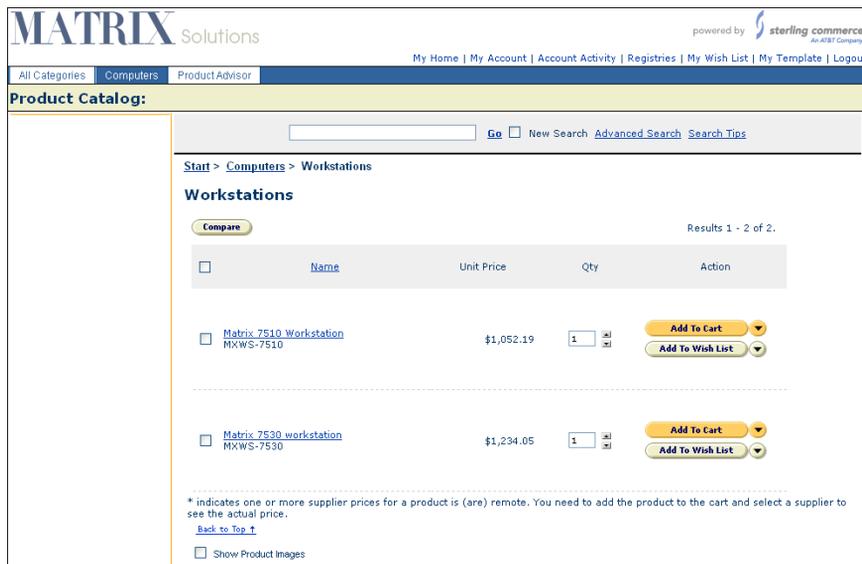


FIGURE 136. Browsing the Product Catalog

Notice the prices. The price for the MXWS-7510 is different from the price in the previous scenario just completed. This is because the partner, FirstCommerce, has been assigned a price list which contains a “conditional” price for this product. You set this “conditional” price when you created the price list in "Modifying the Enterprise Master List" on page 53. The “conditional” price goes to any partner who is partner type “retailer” and partner membership level “platinum”. FirstCommerce meets these criteria so it qualifies for this price.

In this scenario, the prices the end-user sees are the prices the customer pays.

4. Find MXWS-7510.
5. Click the down arrow next to the **Add to Cart** button.

A pop-up displays as shown in the following figure.

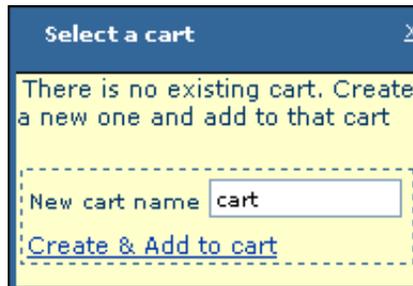


FIGURE 137. Select Cart Pop-Up

6. Enter Jane's Cart in the New cart name field and click Create & Add to cart.
7. The product appears in the end-user's shopping cart at left.

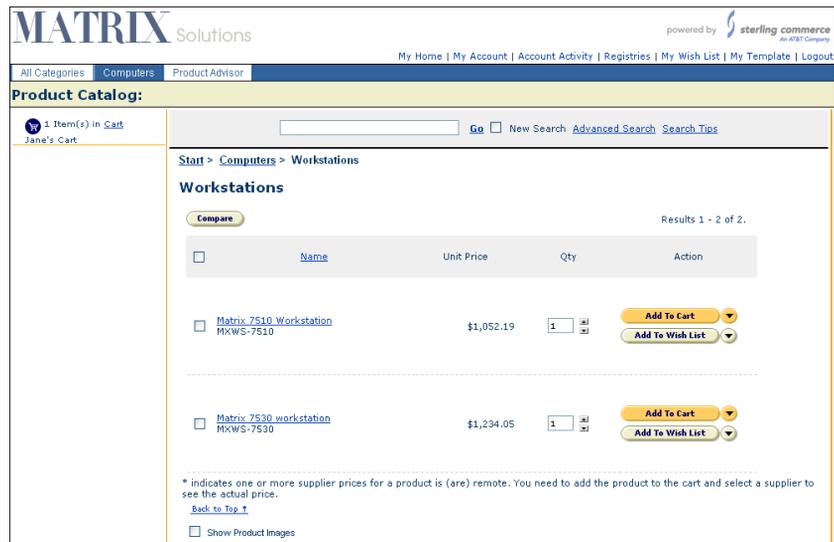


FIGURE 138. Adding a Product to the Shopping Cart

8. Click the Cart link.

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My Home | My Account | Account Activity | Registries | My Wish List | My Template | Logout

All Categories Computers Product Advisor

My Shopping Cart: Jane's Cart [Return to List](#)

[Negotiate Price](#) [Save as Quote](#) [Checkout >](#)

[Update](#)

Name	Availability	Price	Quantity	Total
Matrix 7510 Workstation MXWS-7510	Matrix Solutions Inc.	\$1,052.19	1 <input type="text"/> add del	\$1,052.19
Subtotals:				\$1,052.19
Misc. Adjustments:				\$0.00
Adjusted Subtotal:				\$1,052.19
Tax:				\$63.13
Shipping Cost:				\$52.61
Adj Shipping Cost:				\$52.61
Total Price:				\$1,167.93

[Checkout >](#)

Actions

[Email](#)
[Print View](#)
[Notes](#)
[Route](#)

Details

Quick Add

FIGURE 139. Processing the Shopping Cart

In the out-of-the-box order-placing scenario, the next step is "Checkout".

9. Click **Checkout**.

This displays the order information, ready for placing.

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Review the order details below and click 'Place Order' to complete your purchase

If you aren't done yet, [Go Back and Edit your Cart](#)

Place Order

Order Details - Items Shipping from: Matrix Solutions Inc.	Payment																					
<div style="border-bottom: 1px solid #ccc; padding: 2px;"> Sold-To Jane Spencer FirstCommerce 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA jspencer@firstcommerce.com Change </div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"> Shipping Details <table style="width: 100%; font-size: 0.8em;"> <tr> <td style="width: 33%;">Ship To: Jane Spencer FirstCommerce 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA Change</td> <td style="width: 33%;">Ship Via: Standard Shipping</td> <td style="width: 33%;">Shipping Instructions: Ship when complete: Yes <small>What is this?</small> Deliver on:</td> </tr> </table> </div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"> Item Details <table style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr> <th style="text-align: left;">Name</th> <th style="text-align: left;">Ship To</th> <th style="text-align: left;">Ship Via</th> <th style="text-align: left;">Quantity</th> <th style="text-align: left;">Avail.</th> <th style="text-align: left;">Amount</th> </tr> </thead> <tbody> <tr> <td>Matrix 7510 Workstation MXWS-7510</td> <td></td> <td></td> <td style="text-align: center;">1</td> <td style="text-align: center;">0</td> <td style="text-align: right;">\$1,052.19</td> </tr> <tr> <td colspan="5" style="text-align: right; font-weight: bold;">Subtotals:</td> <td style="text-align: right;">\$1,052.19</td> </tr> </tbody> </table> </div>	Ship To: Jane Spencer FirstCommerce 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA Change	Ship Via: Standard Shipping	Shipping Instructions: Ship when complete: Yes <small>What is this?</small> Deliver on:	Name	Ship To	Ship Via	Quantity	Avail.	Amount	Matrix 7510 Workstation MXWS-7510			1	0	\$1,052.19	Subtotals:					\$1,052.19	<div style="border-bottom: 1px solid #ccc; padding: 2px;"> Order Summary Misc. Adjustments: \$0.00 Adjusted Subtotal: \$1,052.19 Tax: \$53.13 Shipping Cost: \$52.61 Adj Shipping Cost: \$52.61 Total Price: \$1,167.93 </div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"> Redeem Coupons/ Gift Certificates Enter promo codes/ gift certificate # here: <input style="width: 100%;" type="text"/> Add </div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"> Billing Address Credit Card Number: Jane Spencer FirstCommerce 234 Advent Drive Suite 405 Palo Alto , CA 94304 USA Change </div> <div style="border-bottom: 1px solid #ccc; padding: 2px;"> Payment Method P.O.#: Taxable: Yes Payment Type: Credit card Credit Card Type: Visa CC Number: Exp. Date: December / 2007 Name On Card: Phone #: Payment Email: jspencer@firstcommerce.com Charge Amount: \$1,167.93 Change </div>
Ship To: Jane Spencer FirstCommerce 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA Change	Ship Via: Standard Shipping	Shipping Instructions: Ship when complete: Yes <small>What is this?</small> Deliver on:																				
Name	Ship To	Ship Via	Quantity	Avail.	Amount																	
Matrix 7510 Workstation MXWS-7510			1	0	\$1,052.19																	
Subtotals:					\$1,052.19																	

FIGURE 140. Checking Out

The addresses shown are derived from one of three places:

- The Partner Profile

You will recognize the address in Figure 140 on page 162 as the sold-to address we created for FirstCommerce in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users".

- The User Profile

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

- The Order Header

You can click the Change link to modify the addresses to be used for the order.

You can also click the Change link beneath each line item to enter individual shipping information for each line item.

10. In the Payment Method panel, click the Change link.

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

11. In the Enter Your Payment Information section, select Account from the Payment Type drop-down list, then enter 123456789 in the Account # field.

12. Click **Save**.

13. The order information redisplay. You are now ready to place the order.

14. Click **Place Order**.

This displays the placed order (Figure 141 on page 164).

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[My Home](#) | [My Account](#) | [Account Activity](#) | [Registries](#) | [My Wish List](#) | [My Template](#) | [Logout](#)

Confirmation of Orders: Reference # 600780 [Return to List](#)

Your (1 out of 1) order(s) were successfully placed and confirmation emails have been sent to your email address. You may want to print a copy of this page for your records.
Order 4366505122 has been put in pending state for approval.

Return to your updated list of orders by clicking here. [Done](#)

Order Details

Order #: 4366505122
 Order placed on: 12/11/2007
 Supplier: Matrix Solutions Inc.
 Status: On Credit Hold
 Total Amount: \$1,167.93

Shipping Information	Billing Information	Sold-To Information
Ship To: Jane Spencer FirstCommerce 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA Ship Via: Standard Shipping Ship when complete: Yes Deliver on: Memo:	PO Number: None Bill To: Jane Spencer FirstCommerce 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA Email Address: jspencer@firstcommerce.com Account Number: 123456789 Charge Amount: \$1,167.93	Sold To: Jane Spencer FirstCommerce 234 Advent Drive Suite 405 Palo Alto, CA 94304 USA Email Address: jspencer@firstcommerce.com

Name	Ship To	Ship Via	Qty	Status	Shipped Qty.	Amount
Matrix 7510 Workstation MXWS-7510			1	On Credit Hold		\$1,052.19
Subtotals:						\$1,052.19
Misc. Adjustments:						\$0.00
Adjusted Subtotal:						\$1,052.19
Tax:						\$65.13
Shipping Cost:						\$52.61
Adj Shipping Cost:						\$52.61
Total Price:						\$1,167.93

FIGURE 141. Placed Order

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

Index

A

admin (enterprise user) 6
Allowed Values display property 130
assigning functions to users 11

C

categories, products 19
child product categories 20, 22

D

data requirements for tutorial 3
define and attach properties 107
display properties 123

E

enterprise users
 creating 5
 roles 9
expand function 127

F

functions
 assigning 11

P

product categories 19

propval function 120

R

requirements, tutorial 3
roles 9
root product category 20

S

string property editor 127

T

tutorial requirements 3

U

UI: ICON GRAPHIC property 132
UI: IGNORE IN QUOTE property 124
UI: ITEM IMAGE NAME property 132
UI: NUMBER OF COLUMNS
 property 133
UI: PRE_PICK GUIDING TEXT
 property 123
UI: ROW SPAN property 134
UI: SHOW ITEM IMAGES property 132
UI: SKIP COLUMNS property 135
UI: SUPPRESS UEV NONE VALUE
 property 131
user-entered values 128

W
wish lists
 creating 137