

Sterling Multi-Channel Selling Solution

Tutorial Guide

Release 8.0.1

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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.

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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, "Storefront Administration"

In this lesson, you learn how to create a child storefront of the tenant enterprise. You also learn how to create storefront administrators and create price lists, then assign the price lists to the storefront's partners.

LESSON 7, "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 8, "Creating Wish Lists, Templates, and Registries"

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

LESSON 9, "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**).

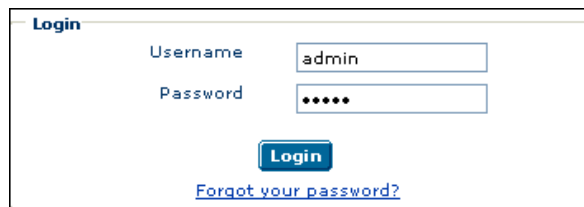



FIGURE 2. Logging In as the admin User

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.



sterling commerce

An AT&T Company

Administration

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

Welcome Tenant Administrator

Commerce Activity

- [Opportunity & Proposal Activity](#)
- [Customer Account Activity](#)
- [Task Management](#)
- [Payment History](#)
- [Find someone else's wish list](#)
- [Find someone else's registry](#)

Product and Catalog Administration

- [Product Master](#)
- [Configuration Models](#)
- [Advisor Flows & Questionnaires](#)
- [Product Entitlements](#)

Pricing Administration

- [Price Lists](#)
- [Pricing Rules](#)
- [Promotions](#)
- [Coupons & Promotional Prices](#)

Channel Management

- [Organization Lookup](#)
- [Campaigns](#)
- [Partner Programs](#)
- [Partner Program Preapprovals & Claims](#)
- [Mailing Lists](#)

System Administration

- [System Users](#)
- [View your Organization Profile](#)
- [Job Scheduler](#)
- [System Services](#)
- [Business Rules](#)

SKU Mapping and Availability Administration

- [Upload & Maintain Products](#)
- [Upload & Maintain Product Inventory Information](#)

Search for Organization by Name

Profile Name

[Advanced Search](#)

Search for User by Name

Username

First Name

Last Name

[Advanced Search](#)

My Tasks

Task ID	Name	Last Modified	Status
More			

[Advanced Search](#)


Team's Tasks

Task ID	Name	Last Modified	Status
More			

[Advanced Search](#)

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

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



sterling commerce

An ARBIS Company

Administration

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

User List: Matrix Solutions Inc.

Find users that match:

Username

Search

Show All

Advanced Search

[Matrix Solutions Inc.:](#) All users shown

Create User

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.

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

The screenshot shows the 'Create New User' page in the Sterling Commerce Administration interface. The page has a header with the Sterling Commerce logo and 'Administration' text. Below the header is a navigation bar with links: 'My Home | My Account | About | Help | Logout'. The main title of the page is 'Create New User'. Below this is a tab labeled 'Info'. The form is divided into three main sections: 'User Information', 'User Locale', and 'User Functions'. The 'User Information' section includes fields for 'Username', 'Password', 'Confirm Password', 'Title', 'First name', 'Last name', 'Job Title', 'Email', 'Department name', 'Department description', 'Phones', and 'Away' status. The 'User Locale' section includes a 'Preferred Locale' dropdown menu set to 'United States'. The 'User Functions' section includes a 'Manager' dropdown menu set to 'User' and a list of functions with checkboxes, all of which are currently unchecked. A 'Cancel' button and a 'Save' button are located at the top right of the form.

FIGURE 5. User Detail Page

5. Create a user using the following information:

TABLE 1. User Information

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

sterling commerce

As AT&T Company

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

Username *

ajones

Password *

Confirm Password *

Title

Mr. ▾

First name *

Alison

Last name *

Jones

Job Title

Email *

ajones@matrix.com

Department name

Department description

Phones

Business ▾

Add

Remove

Away

☐

User Locale

Preferred Locale

United States ▾

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

User Functions

☐ Manager

User Type

User ▾

Functions

☐ Commerce

☐ Sales

☐ Sales Executive

☐ Program Management

☐ Channel Executive

☐ Financials

☐ Lead Administration

☐ Basic Profile Maintenance

☐ Profile Administration

☐ Offline Access

☐ Product Review Administration

☐ Marketing Manager - Segmentation

☐ Marketing Manager - Campaigns

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**.

- 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.

The screenshot shows the Sterling Commerce Administration interface. At the top, the Sterling Commerce logo is on the left, and 'Administration' is on the right. A navigation bar includes links for 'My Home', 'My Account', 'About', 'Help', and 'Logout'. Below this, a yellow banner says 'Welcome Alison Jones'. The main content area is divided into three sections: 'Commerce Activity' with a link to 'Task Management'; 'Channel Management' with a link to 'Organization Lookup'; and 'System Administration' with links to 'System Users' and 'View your Organization Profile'. On the right side, there are two search boxes: 'Search for Organization by Name' with fields for 'Profile Name' and a 'Go' button, and 'Search for User by Name' with fields for 'Username', 'First Name', and 'Last Name', each with a 'Go' button. Below these is a 'My Tasks' table with columns for 'Task ID', 'Name', 'Last Modified', and 'Status'. At the bottom of the tasks table are links for 'More' and 'Advanced Search'.

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.

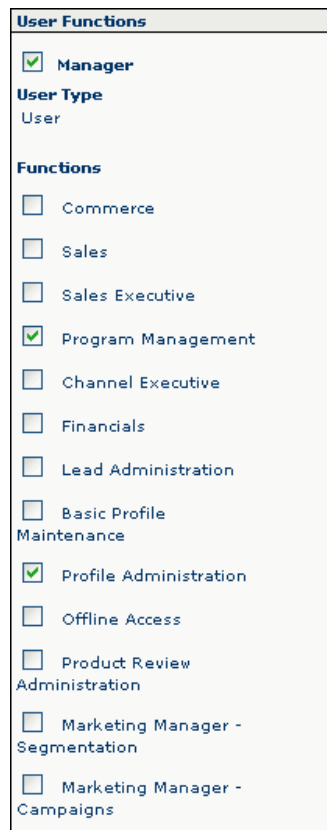
- Click **Logout**.
- Click the Admins Login Here link, then log in again as the **admin** user (password: **admin**).
- In the System Administration section, click System Users.

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 'User Functions' configuration window. At the top, there is a section for 'Manager' with a checked checkbox. Below this is the 'User Type' section, which is set to 'User'. The 'Functions' section contains a list of checkboxes for various roles and permissions. The 'Program Management' and 'Profile Administration' checkboxes are checked, while all other checkboxes 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

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An AT&T Company

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.

User Information

Username *

dmorris

Password *

Confirm Password *

Title

Ms. ▾

First name *

Dinah

Last name *

Morris

Job Title

Email *

dmorris@matrix.com

Department name

Department description

Phones

Business ▾

Add

Remove

Away

☐

User Locale

Preferred Locale

United States ▾

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

User Functions

☐ Manager

User Type

User

Functions

☒ Commerce

☐ Sales

☐ Sales Executive

☐ Program Management

☐ Channel Executive

☐ Financials

☐ Lead Administration

☐ Basic Profile Maintenance

☐ Profile Administration

☐ Offline Access

☐ Product Review Administration

☐ Marketing Manager - Segmentation

☐ Marketing Manager - Campaigns

Status

Please enter a reason when changing the status.

Parent Status

Open

Status

Open ▾

Comment

User Account Limits

Max. Accounts

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**).

The screenshot shows the Sterling Commerce Administration interface. At the top, there's a header with the Sterling Commerce logo and 'Administration' text. A navigation bar includes links like 'My Home', 'My Account', 'About', 'Help', and 'Logout'. Below this, a yellow banner says 'Welcome Dinah Morris'. The main content area is divided into three columns. The left column has three sections: 'Commerce Activity' with links like 'Customer Account Activity', 'Task Management', 'Payment History', 'Find someone else's wish list', and 'Find someone else's registry'; 'Channel Management' with 'Organization Lookup'; and 'System Administration' with 'System Users' and 'View your Organization Profile'. The middle column has two search boxes: 'Search for Organization by Name' with a 'Profile Name' field and a 'Go' button, and 'Search for User by Name' with 'Username', 'First Name', and 'Last Name' fields, each with a 'Go' button. The right column has a 'My Tasks' table with columns 'Task ID', 'Name', 'Last Modified', and 'Status'. Below the table is a 'More' link and an 'Advanced Search' link.

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**).

The screenshot displays the Sterling Commerce Administration interface for user Brent Willow. The top navigation bar includes the Sterling Commerce logo, the word "Administration", and links for "My Home", "My Account", "About", "Help", and "Logout". Below the navigation bar, a yellow banner reads "Welcome Brent Willow". The main content area is divided into several sections:

- Commerce Activity:** Contains a link for "Task Management".
- Product and Catalog Administration:** Includes links for "Product Master", "Configuration Models", "Advisor Flows & Questionnaires", and "Product Endorsements".
- 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 "Mailing 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 of the page, there are two search bars: "Search for Organization by Name" and "Search for User by Name". Below these is a "My Tasks" table with columns for "Task ID", "Name", "Last Modified", and "Status". At the bottom of the right sidebar, there are links for "More" and "Advanced Search".

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".

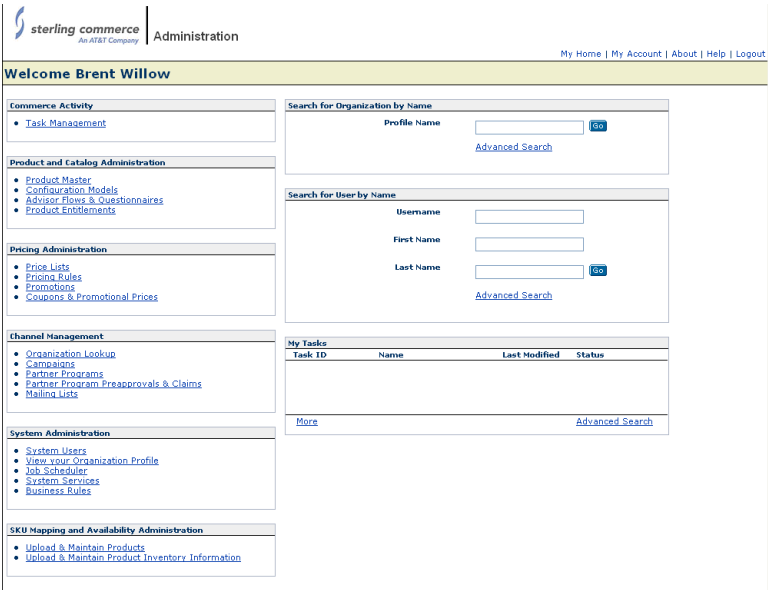


FIGURE 12. Enterprise Home Page

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.

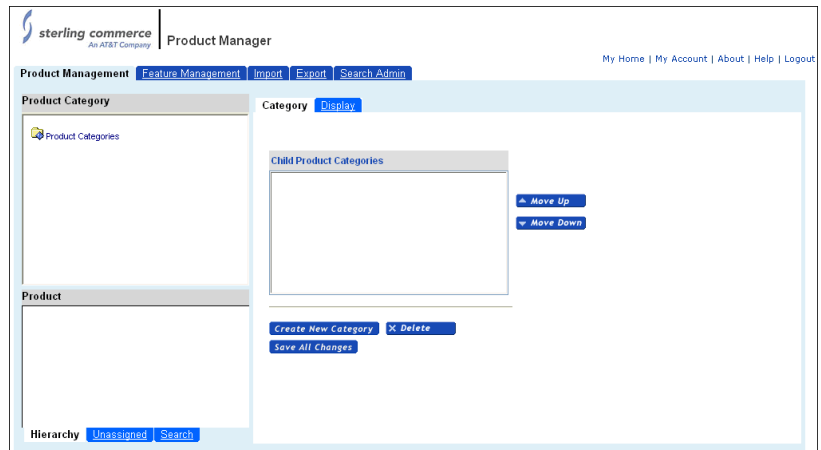


FIGURE 13. Product Manager Page

3. Click **Create New Category**.

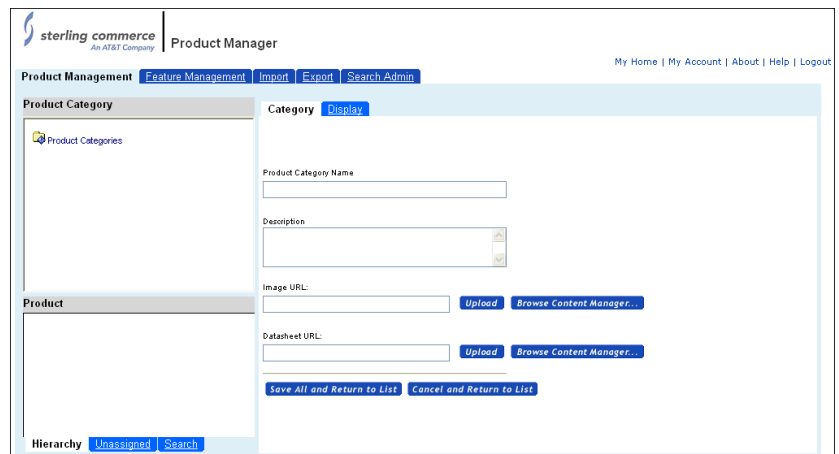


FIGURE 14. Creating a New Category

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.

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Product Manager

My Home | My Account | About | Help | Logout

Product Management Feature Management Import Export Search Admin

Product Category

Product Categories

Product

Hierarchy Unassigned Search

Category Display

Product Category Name
Computers

Description
Desktops and workstations for all needs.

Image URL: Upload Browse Content Manager...

DataSheet URL: Upload Browse Content Manager...

Save All and Return to List Cancel and Return to List

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.

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An AT&T Company

Product Manager

My Home | My Account | About | Help | Logout

Product Management Feature Management Import Export Search Admin

Product Category

Product Categories

Product

Hierarchy Unassigned Search

Category Display

Child Product Categories

Computers

Move Up Move Down

Create New Category X Delete

Save All Changes

FIGURE 16. New Child Product Category

7. Click **Create New Category**.

The screenshot shows the Sterling Commerce Product Manager interface. The top navigation bar includes the Sterling Commerce logo, the title 'Product Manager', and links for 'My Home', 'My Account', 'About', 'Help', and 'Logout'. Below this, the 'Product Management' tab is active, with sub-tabs for 'Feature Management', 'Import', 'Export', and 'Search Admin'. The main content area is divided into two sections: 'Product Category' and 'Product'. The 'Product Category' section has a 'Category' sub-tab and a 'Display' button. It contains a tree view on the left showing 'Product Categories' and 'Computers'. The right side of this section has form fields for 'Product Category Name' (containing 'Software'), 'Description' (containing 'Software for all your needs.'), 'Image URL', and 'Datasheet URL'. Each of these fields has an 'Upload' button and a 'Browse Content Manager...' button. At the bottom of the form are 'Save All and Return to List' and 'Cancel and Return to List' buttons. The 'Product' section is currently empty. At the bottom left, there is a 'Hierarchy' section with 'Unassigned' and 'Search' buttons.

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.

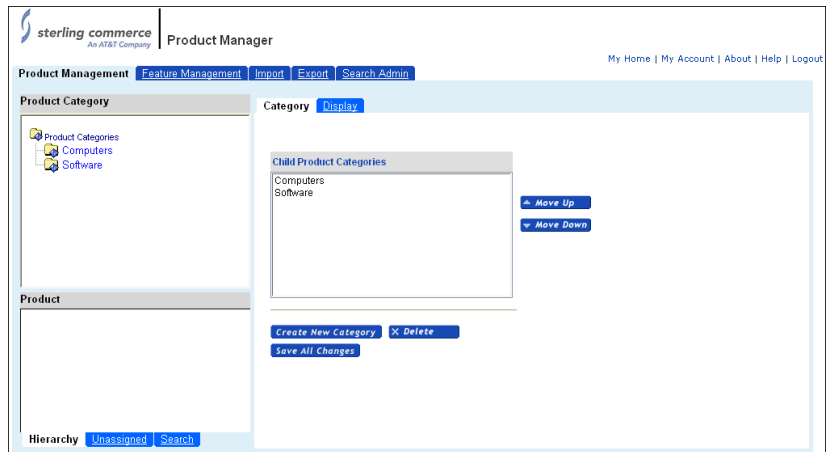


FIGURE 18. Product Management Tab Showing New Category

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.

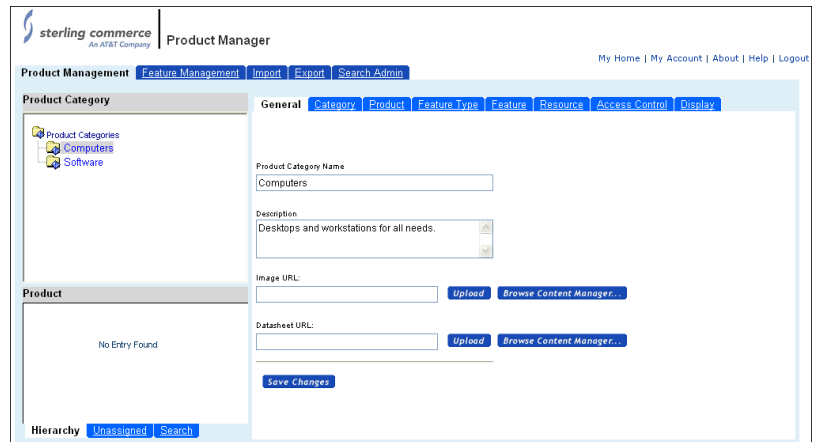


FIGURE 19. Computers Category Selected in the Product Category Frame

2. Click the **Category** tab.

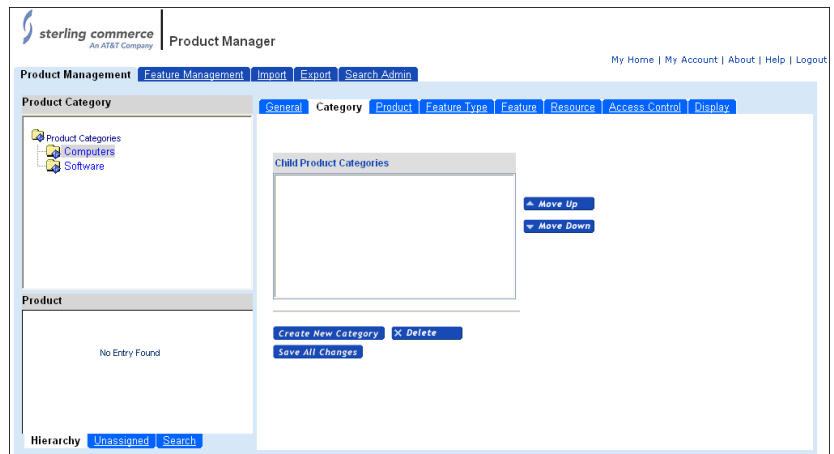


FIGURE 20. Category Tab

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.

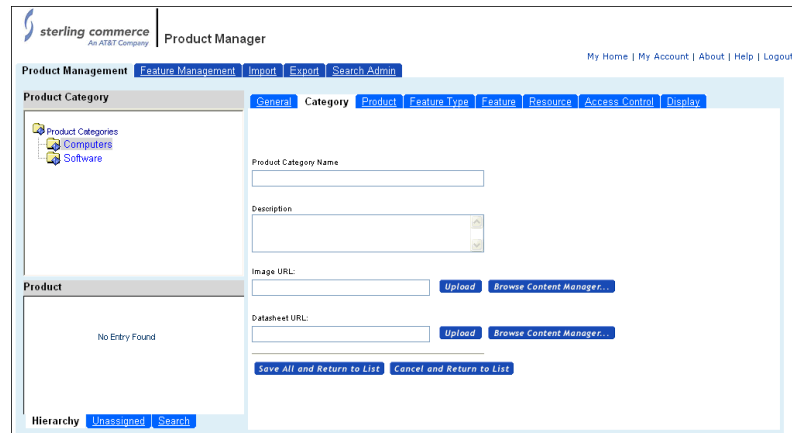


FIGURE 21. Category Tab for a New Category

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.

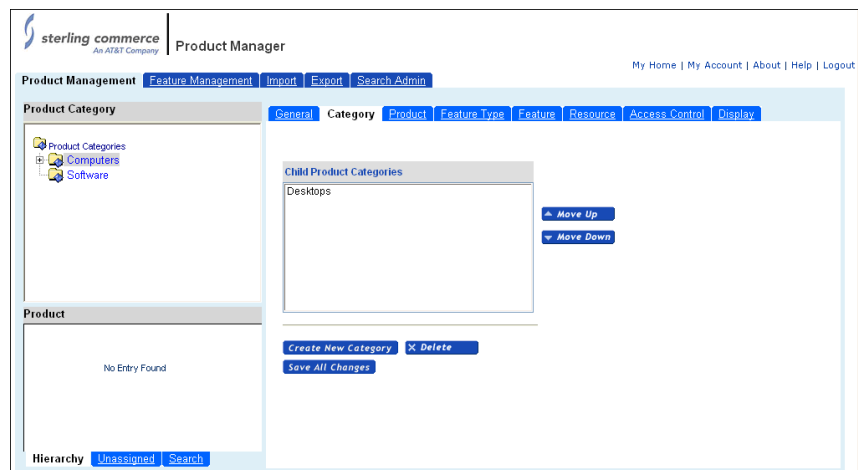


FIGURE 22. Category Tab Showing a New Child Category

- 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.

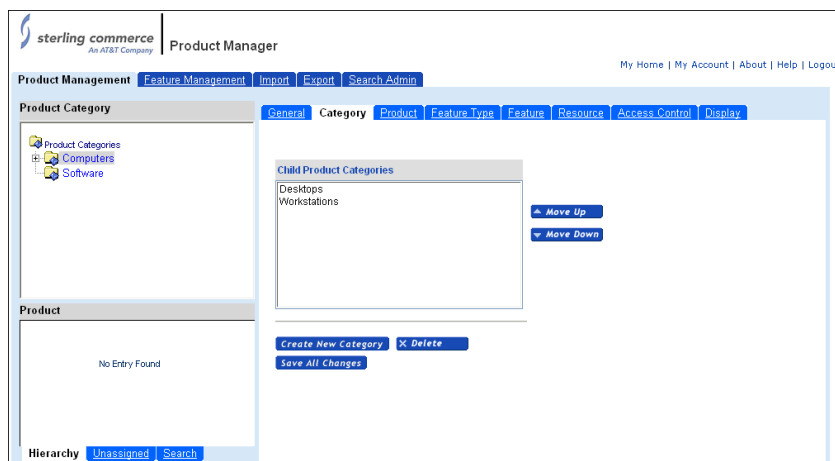


FIGURE 23. Category Tab Showing a New Child Category

- 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.

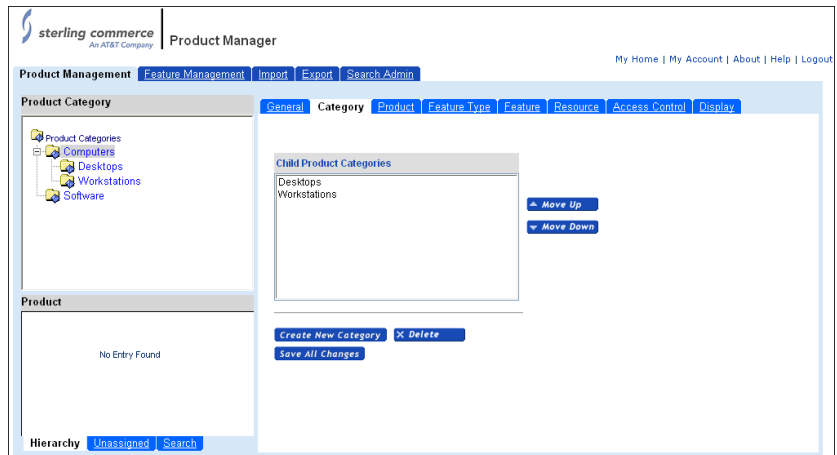


FIGURE 24. Product Category Frame Showing New Nested Categories

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.

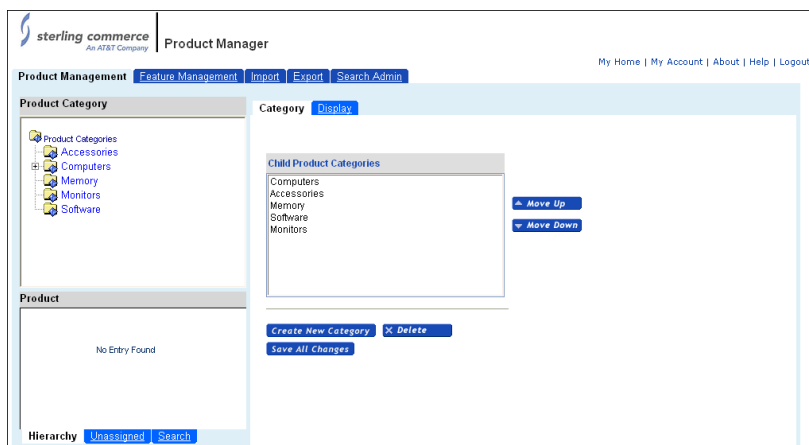


FIGURE 25. Product Management Tab

- 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.

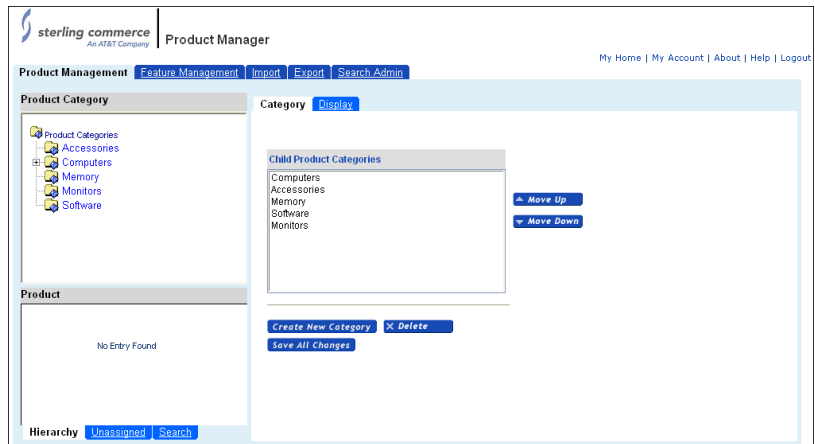


FIGURE 26. Product Management Tab

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.

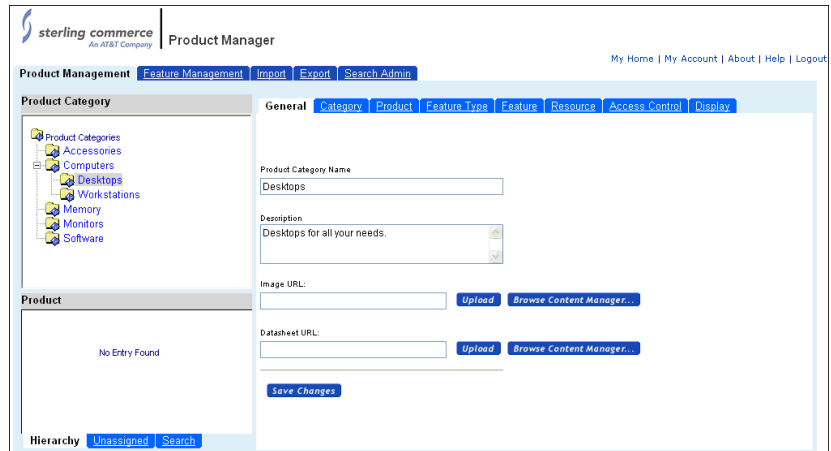


FIGURE 27. Product Management Tab with Tabs for Desktop Category

5. Click the **Product** tab.

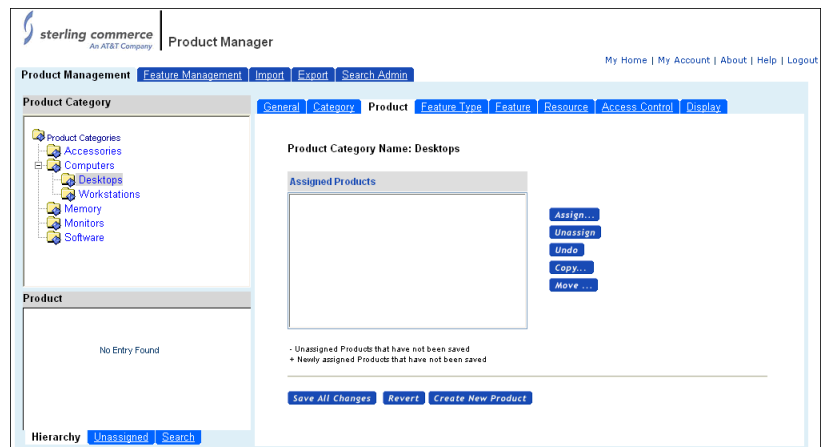


FIGURE 28. Product Management Tab with Product Tab

6. Click **Create New Product**.

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

The screenshot shows the Sterling Commerce Product Manager interface. The top navigation bar includes 'Product Management', 'Feature Management', 'Import', 'Export', and 'Search Admin'. The main area is divided into a left sidebar and a right content area. The sidebar has a 'Product Category' tree with 'Computers' selected, and a 'Product' list showing 'No Entry Found'. The right content area has tabs for 'General', 'Category', 'Product', 'Feature Type', 'Feature', 'Resource', 'Access Control', and 'Display'. The 'Product' tab is active, showing fields for 'Product ID', 'Product Name', and 'Description'. Below these are 'Component Type' (set to 'Normal'), 'Component Sub Type', 'Service Item' checkbox, 'Status' (set to 'In Creation'), 'Start Date' (11/23/2007), and 'End Date' (11/23/2107).

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.

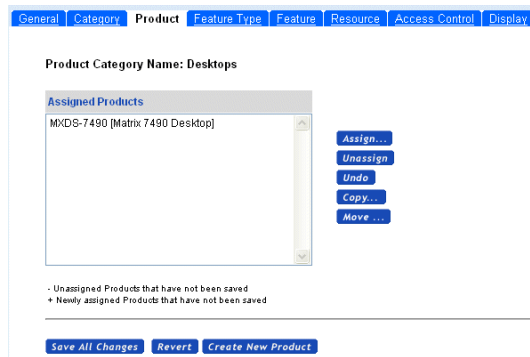


FIGURE 31. Product Listed as an Assigned Product

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.

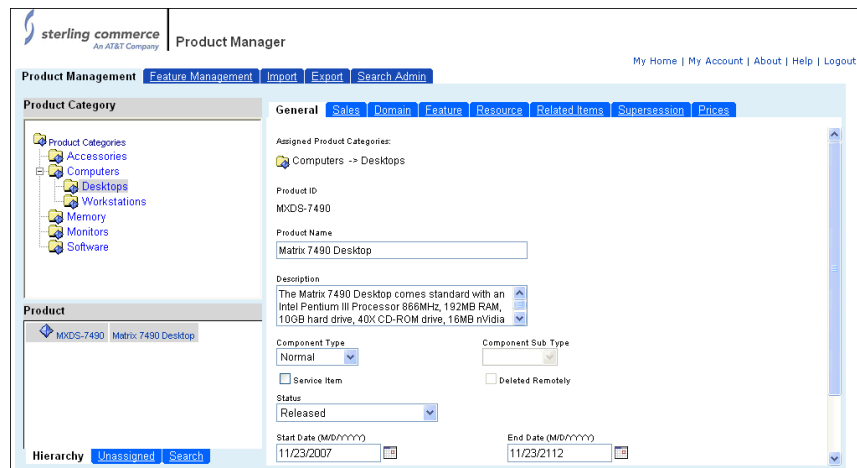


FIGURE 32. New Product Detail Page

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.

The screenshot shows the Sterling Commerce Product Manager interface. The top navigation bar includes 'sterling commerce' logo, 'Product Manager', and links for 'My Home', 'My Account', 'About', 'Help', and 'Logout'. Below this is a sub-navigation bar with 'Product Management', 'Feature Management', 'Import', 'Export', and 'Search Admin'. The main content area is divided into two sections: 'Product Category' on the left and 'Product' on the right. The 'Product Category' section shows a tree view with 'Product Categories' expanded, containing 'Accessories', 'Computers', 'Desktops', 'Workstations', 'Memory', 'Monitors', and 'Software'. The 'Product' section is titled 'MXDS-7490: Matrix 7490 Desktop'. It contains several tabs: 'General', 'Sales', 'Domain', 'Feature', 'Resource', 'Related Items', 'Supersession', and 'Prices'. The 'Sales' tab is active, showing fields for 'Product ID' (MXDS-7490), 'Unit of Measure' (EA), 'Minimum Order Quantity' (1), 'Product Name' (Matrix 7490 Desktop), 'Quantity Per Unit' (1.000000), and 'Lead Time in days' (0). There are also checkboxes for 'Cannot be Sold Separately', 'Not Eligible for Shipping Discount', 'Not Eligible for In-Store Pickup', and 'Not Shippable'. At the bottom, there are fields for 'Image URL' (../images/desktop1.jpg) and 'Large Image URL', each with an 'Upload' button and a 'Browse Content Manager...' link. A 'Hierarchy' section at the bottom left has 'Unassigned' and 'Search' buttons.

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.

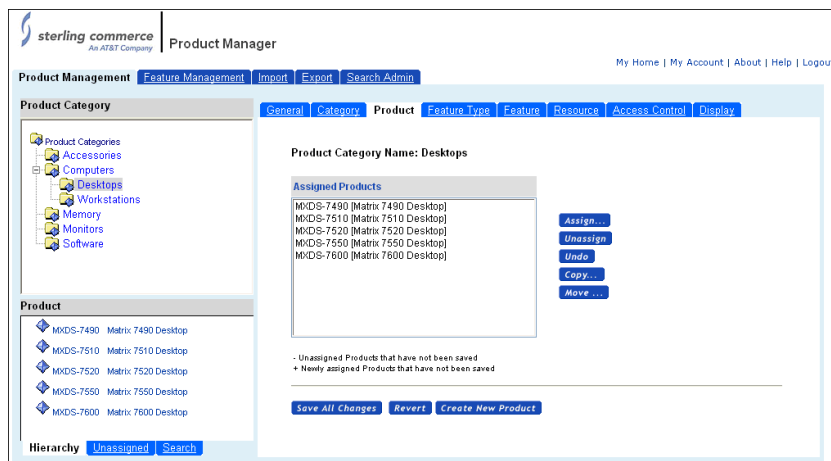


FIGURE 34. Desktops Category with Desktop Products

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.

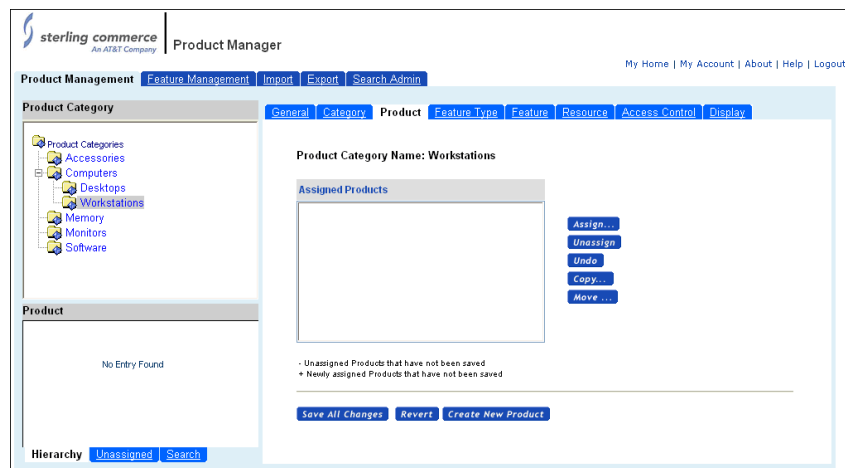


FIGURE 35. Product Tab

3. Click **Create New Product**.

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

The screenshot shows the Sterling Commerce Product Manager interface. The top navigation bar includes links for Product Management, Feature Management, Import, Export, and Search Admin. The left sidebar shows a tree view of Product Categories (Accessories, Computers, Desktops, Workstations, Memory, Monitors, Software) and a Product section with a 'No Entry Found' message. The main content area is the Product tab, which contains the following fields:

- Product ID:
- Product Name:
- Description:
- Component Type:
- Component Sub Type:
- ☐ Service Item
- Status:
- Start Date (MM/DD/YYYY):
- End Date (MM/DD/YYYY):

At the bottom of the Product section, there are links for Hierarchy, Unassigned, and Search.

FIGURE 36. Product Tab with Fields for New Product

- 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.

- Select the Component Type as Normal.
- Select Released from the **Status** drop-down list.
- 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.

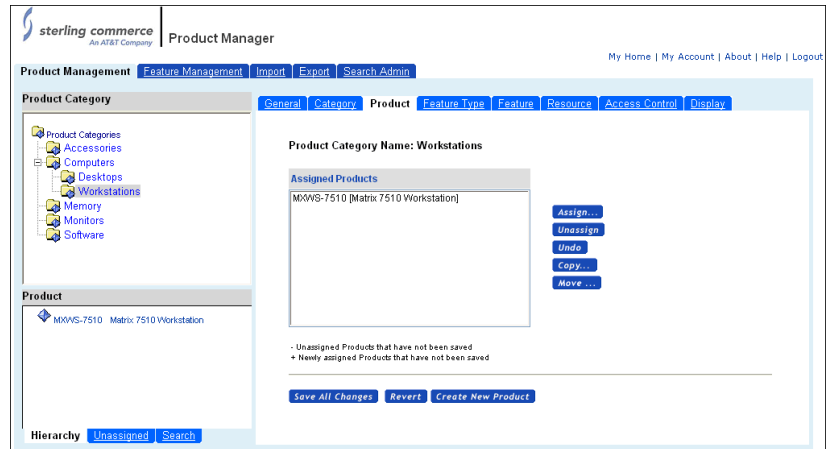


FIGURE 37. Product Frame with New Product

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.

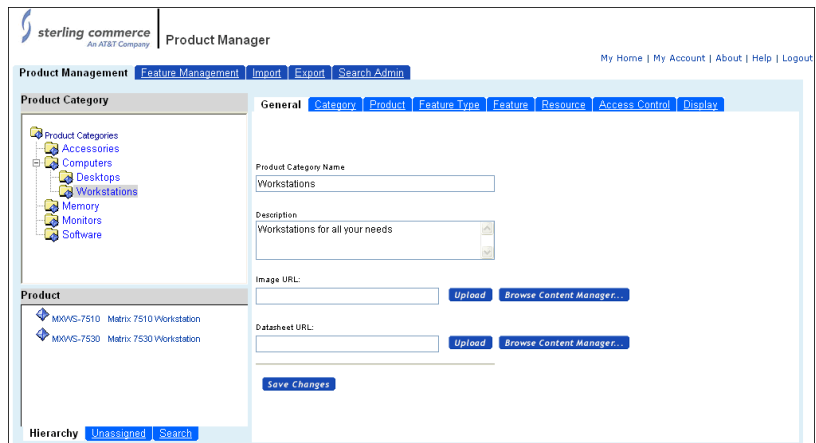


FIGURE 38. The Workstations Product Panel

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.



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".

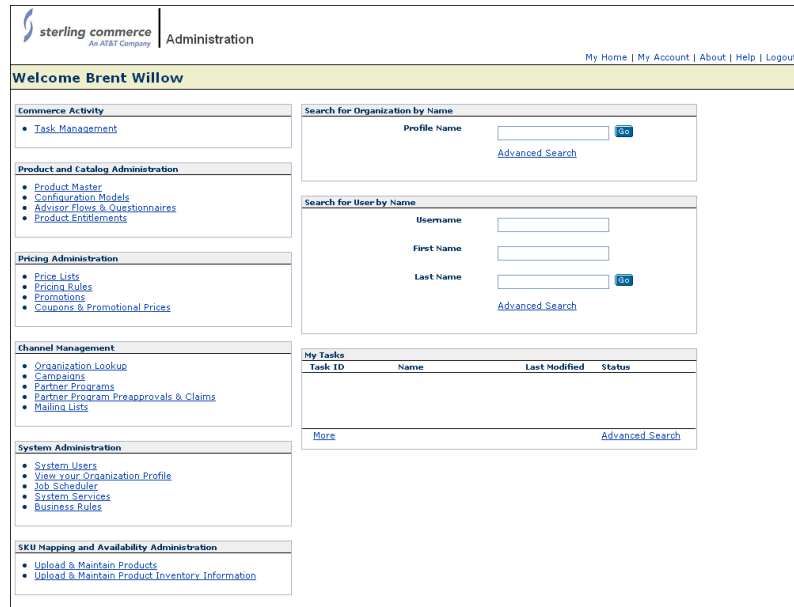


FIGURE 40. Enterprise Home Page

2. Click Price Lists.

The Price Lists page appears.

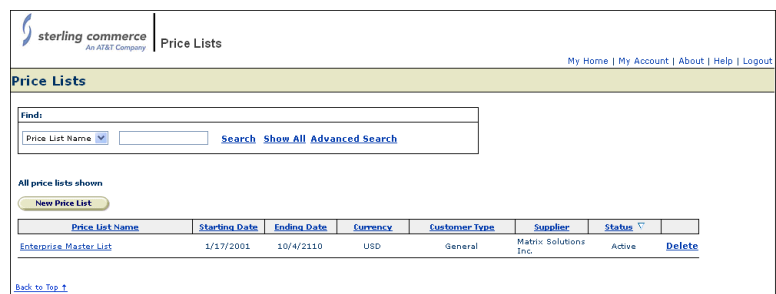


FIGURE 41. Price Lists Page

3. Click New Price List.

The New Price List page appears.

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.

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An AT&T Company

Price Lists

My Home | My Account | About | Help | Logout

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

Edit Header

Enter data and click on Create button to create price list.

Create Cancel

*Required Fields

Price List Header

* Name: Commercial_One

Description: Commercial Price List

* Currency: USD

* Customer Type: General

* Supplier: Matrix Solutions Inc [Assign...](#)

* Starting Date: 11/23/2007 0:00

* Ending Date: 11/23/2012 0:00

Active: ☒

FIGURE 43. Price List Detail Page

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

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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

Make a duplicate of this price list by using the Copy button. The Download button provides the ability to download this price list as tab delimited file. After changing price list header information save changes using the Save button. Click on the Assign All button to assign this price list to all organizations in the system. Click on the Unassign All button to remove all current assignments of this price list.

Assign All Unassign All Download Copy Save

*Required Fields

Price List Header

* Name: Commercial_One

Description: Commercial Price List

* Currency: USD

* Customer Type: General

* Supplier: Matrix Solutions Inc [Assign...](#)

* Starting Date: 11/23/2007 1:00

* Ending Date: 11/23/2012 0:00

Active: ☒

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**.

sterling commerce | 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 Search ☒ 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.

<input type="checkbox"/>	Product ID	Product Name	Start Date	End Date	Supplier	List Price	+/- in %	+/- in Abs.	Price
No Rows Found									

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**.

sterling commerce | 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:

Product ID * Search ☒ 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.

<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							
<input type="checkbox"/>	MXDS-7510	Matrix 7510 Desktop							
<input type="checkbox"/>	MXDS-7520	Matrix 7520 Desktop							
<input type="checkbox"/>	MXDS-7550	Matrix 7550 Desktop							
<input type="checkbox"/>	MXDS-7600	Matrix 7600 Desktop							
<input type="checkbox"/>	MXWS-7510	Matrix 7510 Workstation							
<input type="checkbox"/>	MXWS-7530	Matrix 7530 Workstation							

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**.

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:

- Click **Edit Items**.

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	

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Save

FIGURE 48. Price List Detail Page: Edit Items Tab

48

Sterling Multi-Channel Selling Solution Tutorial Guide

14. 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.

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

The screenshot shows the Sterling Commerce Price Lists page. At the top, there's a header with the Sterling Commerce logo and 'Price Lists' text. Below the header, there's a search bar with a 'Find:' label and a 'Search' button. A 'New Price List' button is also visible. The main content area displays a table of price lists. The table has the following columns: Price List Name, Starting Date, Ending Date, Currency, Customer Type, Supplier, Status, and a Delete link. Two price lists are listed: 'Commercial_One' and 'Enterprise Master List'. The 'Enterprise Master List' is highlighted in blue.

Price List Name	Starting Date	Ending Date	Currency	Customer Type	Supplier	Status	Delete
Commercial_One	11/23/2007	11/23/2012	USD	General	Matrix Solutions Inc.	Active	Delete
Enterprise Master List	1/17/2001	10/4/2110	USD	General	Matrix Solutions Inc.	Active	Delete

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).

The screenshot shows the 'New Price List' form in the Sterling Commerce application. The form is titled 'New Price List' and has a sub-header 'Edit Header'. It includes a 'Go to Price Lists' link. The form contains the following fields and controls:

- Name:** A text input field.
- Description:** A text area with a dropdown arrow.
- Currency:** A dropdown menu.
- Customer Type:** A dropdown menu.
- Supplier:** A text input field showing 'Matrix Solutions Inc.' with an 'Assign...' button.
- Starting Date:** A date picker showing '01/01/2010'.
- Ending Date:** A date picker showing '01/01/2010'.
- Active:** A checkbox.

Buttons for 'Create' and 'Cancel' are located at the top right. A note at the bottom right states '*Required Fields'.

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 displays the 'Price List Detail Page' in the Sterling Commerce system. The page title is '7510 Computers in US Dollars'. Below the title, there are tabs for 'Edit Header', 'Edit Items', 'Assign Products', 'Mass Update', and 'View Organization Assignments'. The 'Assign Products' tab is currently selected. The main content area contains a form for editing the price list header. The form includes the following fields and values:

- 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 next to it)
- 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:** ☒

At the top of the form, there are buttons for 'Assign All', 'Unassign All', 'Download', 'Copy', and 'Save'. A note above these buttons states: 'Make a duplicate of this price list by using the Copy button. The Download button provides the ability to download this price list as tab delimited file. After changing price list header information save changes using the Save button. Click on the Assign All button to assign this price list to all organizations in the system. Click on the Unassign All button to remove all current assignments of this price list.'


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**.



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Price Lists

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

7510 Computers in US Dollars

[Go to Price Lists](#)

[Edit Header](#)
[Edit Items](#)
[Assign Products](#)
[Mass Update](#)
[View Organization Assignments](#)

Find:

Product ID





7510

Search

☒ 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-7510	Matrix 7510 Desktop			 				
<input type="checkbox"/>	MXWS-7510	Matrix 7510 Workstation			 				

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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.

The screenshot shows the 'Enterprise Master List' page with the 'Assign Products' tab selected. The 'Find:' section includes a 'Category' dropdown, a search input field, and a 'Search' button. Below the search section is an 'Assign' button and a table with columns: Product ID, Product Name, Start Date, End Date, Supplier, List Price, +/- in %, +/- in Abs., and Price. The table currently displays 'No Rows Found'.

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:

<input type="checkbox"/> MXWS-7510	Matrix 7510 Workstation	<input type="text"/>	<input type="text"/>	<input type="text"/>		1299.00	-10.0000	<input type="text"/>	1,169.10		
------------------------------------	-------------------------	----------------------	----------------------	----------------------	--	---------	----------	----------------------	----------	--	--

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.



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:

sterling commerce

An AT&T Company

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		
Reseller	Not Applicable		
Retailer	Platinum	-10	
Retailer	Gold		

FIGURE 56. Conditional Price List Page

- Click **Save**.
- Click **Return**.
- 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.

LESSON 4

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
Bellissima	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 word "Administration". A navigation bar at the top right contains links: "My Home | My Account | About | Help | Logout". Below the header, a yellow banner displays "Welcome Brent Willow".

The left sidebar contains a navigation menu with the following sections:

- Commerce Activity**
 - Task Management
- Product and Catalog Administration**
 - Product Master
 - Configuration Models
 - Advisor Flows & Questionnaires
 - Product Endorsements
- Pricing Administration**
 - Price Lists
 - Pricing Rules
 - Promotions
 - Coupons & Promotional Prices
- Channel Management**
 - Organization Lookup
 - Campaigns
 - Partner Programs
 - Partner Program Preapprovals & Claims
 - Marketing Lists
- System Administration**
 - System Users
 - View Your Organization Profile
 - Job Scheduler
 - System Services
 - Business Rules
- SKU Mapping and Availability Administration**
 - Upload & Maintain Products
 - Upload & Maintain Product Inventory Information

The main content area on the right contains two search panels and a task table:

Search for Organization by Name

Profile Name: [Advanced Search](#)

Search for User by Name

Username:
First Name:
Last Name: [Advanced Search](#)

My Tasks

Task ID	Name	Last Modified	Status

Below the table are links: [More](#) and [Advanced Search](#).

FIGURE 57. Enterprise Home Page

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

sterling commerce Administration

My Home | My Account | About | Help | Logout

Profile List:

Search for Profiles

Name Search Show All Advanced Search

Export List Create Storefront Create Profile

<input type="checkbox"/>	Name ↕	Root Profile Name	Type	Level
<input type="checkbox"/>	Matrix Solutions Inc. [*]		Enterprise	Enterprise

[*] denotes a Storefront

FIGURE 58. Profile List Page

3. Click **Create Profile**.

This displays the Organization Profile: New Profile page.

sterling commerce Profile Manager

My Home | My Account | About | Help | Logout

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

Create

Cancel Save

Please enter mandatory profile information. Once this profile has been saved, you will be allowed to enter more information.
NOTE: (*) Items are required.

General Information

Profile name *

Main telephone

Main facsimile

Profile type *

Profile level *

XML Message Version

Login/Password required ☒

Organization website address

Organization Email

Distributors

Message URL

Content Type

Custom Field #1

Custom Field #2

Custom Field #3

Custom Field #4

Custom Field #5

Enter Organization ID

Organization ID *

Addresses

Address line 1 *

Address line 2

City *

State/Province and Postal code

Country *

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.

sterling commerce
An AT&T Company

Profile Manager

My Home | My Account | About | Help | Logout

Organization Profile: Bellissima [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 *
Bellissima

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 %
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 [GO](#)

FIGURE 60. Bellissima 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.



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](#)

Addresses

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

Address line 1 *
1026 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 Sold To Address
☒ Set As Default Ship To Address
☒ Set As Default Bill To Address

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.

sterling commerce
An AT&T Company

Profile Manager

My Home | My Account | About | Help | Logout

Organization Profile: Bellissima [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: Bellissima [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 *

BELLA-1000

Founded

Current FY Revenue

0.000000

Dun & Bradstreet ID

Total # of employees

Next FY Revenue

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 shows the 'Business' tab in the Sterling Commerce Profile Manager. The page header includes the Sterling Commerce logo and 'Profile Manager'. A navigation bar at the top lists tabs: Info, Addresses, Detail, Business (selected), Hierarchy, Commerce, Assigned To, Pricelists, Product Entitlements, and Attributes. Below the navigation bar, there are sections for 'Product Categories', 'Territories', and 'Customer types', each with a 'Select To Add' dropdown and a 'Delete' button. The 'Contracts' section is expanded, showing a table with columns for Name, Active date, End date, Agreement date, Volume commitment (YR), and Volume commitment (QTR). The table contains one row with empty input fields. A 'Notes' section is at the bottom with a text area and a 'Save' button.

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. The top navigation bar includes the Sterling Commerce logo and the text "An AT&T Company". The main header shows "Profile Manager" and a "Return to List" link. Below the header is a tabbed interface with tabs for "Info", "Addresses", "Detail", "Business", "Hierarchy", "Commerce", "Assigned To", "Pricelists", "Product Entitlements", and "Attributes". The "Business" tab is selected, and the "Contracts" sub-tab is active. The "Contracts" section contains the following fields:

- Product Categories:** A dropdown menu labeled "Select To Add" and a "Delete" button.
- Territories:** A dropdown menu labeled "Select To Add" and a "Delete" button.
- Customer types:** A dropdown menu labeled "Select To Add" and a "Delete" button.
- Contracts:** A section with a "Delete" button, a "Duplicate" button, and a "Previous" button. It also shows "2 out of 2" and a "Next" button.
- NOTE:** (*) Items are required when creating a contract.
- Name:** A text field containing "PRS2-RG03013".
- Type code:** A text field containing "MS2-PN002871".
- Agreement date (M/D/YYYY):** A date field.
- Active date (M/D/YYYY):** A date field.
- End date (M/D/YYYY):** A date field.
- Volume commitment (YR):** A text field containing "0".
- Volume commitment (QTR):** A text field containing "0".
- Notes:** A text area.

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.

sterling commerce
An AT&T Company

Administration

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

User List: Bellissima

Find users that match:

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

Bellissima: All users shown

[Create User](#)

Username	Full Name	Functions	Manager	Profile	Business Phone	Email Address
No Rows Found						

[Back to Top ↑](#)

[*] denotes a Storefront

FIGURE 66. User List Page

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

sterling commerce

As AT&T Company

Administration

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

Create New User

Info

Belongs To: [Bellissima](#)

[Cancel](#)
[Save](#)

NOTE: (*) items are required.

<div>User Information</div> <div>Username *</div> <div> <input type="text"/> </div> <div>Password *</div> <div> <input type="password"/> </div> <div>Confirm Password *</div> <div> <input type="password"/> </div> <div>Title</div> <div> <input type="text"/> </div> <div>First name *</div> <div> <input type="text"/> </div> <div>Last name *</div> <div> <input type="text"/> </div> <div>Job Title</div> <div> <input type="text"/> </div> <div>Email *</div> <div> <input type="text"/> </div> <div>Department name</div> <div> <input type="text"/> </div> <div>Department description</div> <div> <input type="text"/> </div> <div>Phones</div> <div> <div>Business</div> <div> <input type="text"/> </div> <div>Add</div> </div> <div> <input type="text"/> </div> <div>Remove</div>
--

Away

☐

Attributes

No Rows Found

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.

- Among the Functions, click the **Profile Administration** check box.
- 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 header with the Sterling Commerce logo and navigation links. Below the header, there are tabs for 'Info', 'Addresses', 'Preferences', 'Attributes', and 'Notes'. The 'Info' tab is selected, showing the user's details. The page is divided into several sections: 'User Information' (Username, Password, Confirm Password, Title, First name, Last name, Job Title, Email, Department name, Department description, Phones, Away), 'User Locale' (Preferred Locale, Note), 'User Functions' (Manager, User Type, Functions), 'Status' (Parent Status, Status, Comment), and 'Spending Limits & Approver' (Spending Limit, Approver, Proxy for Approver). The 'User Functions' section has a checkbox for 'Profile Administration' which is checked. The 'Status' section has a dropdown for 'Status' set to 'Open'. The 'Spending Limits & Approver' section has a dropdown for 'Spending Limit' set to 'USD'.

FIGURE 68. User Detail Page

- Click **View Users**.

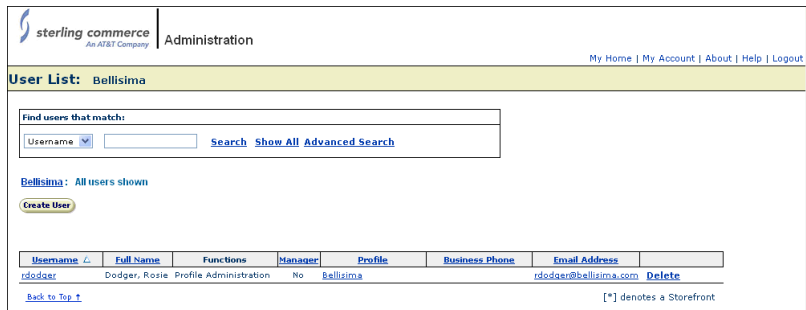


FIGURE 69. User List Page

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 **Bellissima** 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.

MATRIX Solutions
powered by **sterling commerce**
My Home | My Account | Account Activity | Registries | Login or Register

Welcome to Matrix Solutions Inc.

Catalog Search
[Search Box] [Go]
[Advanced Search](#)
Other Information
[Admins Login Here](#)
[Check my Order Status](#)
[Partner Selector](#)
[Change Locale](#)
[Find someone else's wish list](#)
[Find someone else's registry](#)

Login
Username: [Text Box]
Password: [Text Box]
☒ Remember Me
Login
[Forgot your password?](#)
[Set up an account now!](#)

FIGURE 70. Partner User Home Page

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

This displays the Partner User List page.

MATRIX Solutions
powered by **sterling commerce**
My Home | My Account | Help | Logout

User List: Bellissima

Find users that match:
Username [Dropdown] [Text Box] **Search** [Show All](#) [Advanced Search](#)

Bellissima: All users shown
Create User **List recovery**

Username	Full Name	Functions	Manager	Profile	Business Phone	Email Address
rdodger	Dodger, Rosie	Profile Administration	No	Bellissima		rdodger@bellissima.com

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

FIGURE 71. Partner User List Page

- Click **Create User**.

This displays the Partner User Detail page.

MATRIX Solutions

powered by

sterling commerce

an IBM Company

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

Create New User

Info

Belongs To: [Bellissima](#)

Cancel

Save

NOTE: (*) Items are required.

User Information

Username *

Password *

Confirm Password *

Title

Mr. ▾

First name *

Last name *

Job Title

Email *

Department name

Department description

Phones

Business ▾

Add

Remove

Away

☐

User Locale

Preferred Locale

United States ▾

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

User Functions

☐ Manager

User Type

User ▾

Functions

☐ Commerce

☐ Commerce Executive

☐ Sales

☐ Sales Executive

☐ Financials

☐ Marketing Executive

☐ Basic Profile Maintenance

☐ Profile Administration

☐ Offline Access

☐ Product Reviewer

Payment Options

Please enter the default payment information

Payment Type

Credit card ▾

Credit Card Type

Visa ▾

Payment Expiration Date

November ▾

2007 ▾

Payment Number/Account Number

Card holder name

First Name

Middle Name/Initial

Last Name

Spending Limits & Approver

Feature requires both Spending Limit and Approver.

Spending Limit

USD ▾

Approver

Proxy for Approvers

Attributes

No Rows Found

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.

- Check the **Commerce** function check box.
- Click **Save**.
- Click **View Users**.

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

MATRIX Solutions powered by **sterling commerce**
My Home | My Account | Help | Logout

User List: Bellisima

Find users that match:

Username Search Show All Advanced Search

Bellisima: All users shown

Create User List recovery

Username	Full Name	Functions	Manager	Profile	Business Phone	Email Address	
hfortuna	Fortuna, Hal	Commerce	No	Bellisima		hfortuna@bellisima.com	Delete
rdodger	Dodger, Rosie	Profile Administration	No	Bellisima		rdodger@bellisima.com	

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

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".



Administration

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

Welcome Brent Willow

Commerce Activity

- [Task Management](#)

Product and Catalog Administration

- [Product Master](#)
- [Configuration Models](#)
- [Advisor Plans & Questionnaires](#)
- [Product Entitlements](#)

Pricing Administration

- [Price Lists](#)
- [Pricing Rules](#)
- [Promotions](#)
- [Coupons & Promotional Prices](#)

Channel Management

- [Organization Lookup](#)
- [Campaigns](#)
- [Partner Programs](#)
- [Partner Program Preapprovals & Claims](#)
- [Mailing Lists](#)

System Administration

- [System Users](#)
- [View your Organization Profile](#)
- [Job Scheduler](#)
- [System Services](#)
- [Business Rules](#)

SKU Mapping and Availability Administration

- [Upload & Maintain Products](#)
- [Upload & Maintain Product Inventory Information](#)

Search for Organization by Name

Profile Name

[Advanced Search](#)

Search for User by Name

Username

First Name

Last Name

[Advanced Search](#)

My Tasks


Task ID	Name	Last Modified	Status
More			

[Advanced Search](#)

FIGURE 74. Enterprise Home Page

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

The Profile List page appears.



Administration

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

Profile List:

Search for Profiles

Name

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

Export List

Create Storefront

Create Profile

<input type="checkbox"/>	Name ↕	Root Profile Name	Type	Level
<input type="checkbox"/>	Bellissima		Distributor	Gold
<input type="checkbox"/>	CompCom		OEM	Platinum
<input type="checkbox"/>	FirstCommerce		Retailer	Platinum
<input type="checkbox"/>	Matrix Solutions Inc. [*]		Enterprise	Enterprise

[*] denotes a Storefront

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: Bellissima
- 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**.

- Commercial
- Pharmaceutical
- Telecommunications
- High Technology
- Education

The screenshot shows the Sterling Commerce Profile Manager interface. The header includes the Sterling Commerce logo and the text 'Profile Manager'. There are navigation links: 'My Home | My Account | About | Help | Logout'. The main title is 'Organization Profile: Halona Systems' with a 'Return to List' link. Below this is a tabbed interface with tabs: 'Info', 'Addresses', 'Detail', 'Business', 'Hierarchy', 'Commerce', 'Assigned To', 'Pricelists', 'Product Entitlements', and 'Attributes'. The 'Business' tab is selected. The 'Business' section contains three sub-sections: 'Product Categories' with a 'Select To Add' dropdown and a 'Delete' button; 'Territories' with a dropdown showing 'North America' and a 'Delete' button; and 'Customer types' with a dropdown showing 'Education' and a 'Delete' button. Below these is the 'Contracts' section, which has a 'Delete' button, a 'Duplicate' button (highlighted), and a 'Previous' button. The 'Contracts' section also includes a 'Next' button. The 'Contracts' section contains a form with fields for 'Name', 'Active date (M/D/YYYY)', 'End date (M/D/YYYY)', 'Agreement date (M/D/YYYY)', 'Volume commitment (YR)', and 'Volume commitment (QTR)'. The 'Notes' section is at the bottom.

FIGURE 77. Organization Profile: Business Tab

- 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.
- Click **Duplicate** to create a second contract. Enter the following information:
 - Name: PRS5-RG53018
 - Type code: MS5-PN007891
- 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.

sterling commerce
An AT&T Company

Administration

My Home | My Account | About | Help | Logout

Create New User

Info

Belongs To: [Halona Systems](#)

Cancel Save

NOTE: (*) items are required.

User Information	User Locale	User Functions	Spending Limits & Approver
<p>Username *</p> <input type="text"/>	<p>Preferred Locale</p> <p>United States ▼</p> <p><small>Note: changes to Preferred Locale will take effect on the next login.</small></p>	<p><input type="checkbox"/> Manager</p> <p>User Type</p> <p>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><small>Feature requires both Spending Limit and Approver.</small></p> <p>Spending Limit</p> <p><input type="text"/></p> <p>USD ▼</p> <p>Approver</p> <p><input type="text"/></p> <p>Proxy for Approver</p> <p><input type="text"/></p>
<p>Password *</p> <input type="password"/>			
<p>Confirm Password *</p> <input type="password"/>			
<p>Title</p> <p>Mr. ▼</p>			
<p>First name *</p> <input type="text"/>			
<p>Last name *</p> <input type="text"/>			
<p>Job Title</p> <input type="text"/>			
<p>Email *</p> <input type="text"/>			
<p>Department name</p> <input type="text"/>			
<p>Department description</p> <input type="text"/>			
<p>Phones</p> <p>Business ▼ <input type="text"/> Add</p>			
<p><input type="text"/> Remove</p>			
<p>Away</p> <p><input type="checkbox"/></p>			
<p>Attributes</p> <p>No Rows Found</p>			

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.

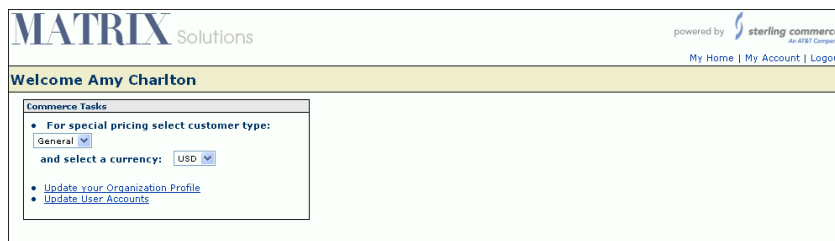


FIGURE 79. Partner Home Page

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".

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

 sterling commerce
An AT&T Company

Administration

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

Profile List:

Search for Profiles

Name ▾

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

[Export List](#) [Create Storefront](#) [Create Profile](#)

<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

[*] denotes a Storefront

FIGURE 80. Profile Page As Seen By the ajones User

3. Click the AnonymousUserPartner link.
4. 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".

 COMERGENT
eBusiness System

Profile Manager

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

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

[Info](#) | [Addresses](#) | [Detail](#) | [Business](#) | [Assigned To](#) | [Pricelists](#) | [Product Entitlements](#) | [Notes](#)

Select appropriate price list for assignment and click Save button to save changes. \$ indicates the price list inherited from parent.

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

Assign <input type="checkbox"/>	Sharable <input type="checkbox"/>	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

5. Click the check box next to the Enterprise Master List.
6. 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	Bellissima	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.

MATRIX Solutions powered by sterling commerce An IBM Company

[All Categories](#) | [Computers](#) | [Product Advisor](#) | [My Home](#) | [My Account](#) | [Account Activity](#) | [Registries](#) | [My Wish List](#) | [My Template](#) | [Logout](#)

Welcome Jane Spencer

Browse Categories

- [Computers \(7\)](#)
- [Desktops \(5\)](#)
- [Workstations \(2\)](#)

Product Search

[Advanced Search](#) [Search](#)

Commerce Tasks

- For special pricing select customer type: and select a currency:
- [Update your Organization Profile](#)
- [Update User Accounts](#)

Orders

Sales Order #	Purchase Order #	Last Modified	Overall Status
More Advanced Search			

Carts

Cart ID	Cart Name	Last Modified
More Advanced Search		

Quotes

Quote ID	Name	Last Modified	Status
More Advanced Search			

Service Contracts

Contract ID	Name	Last Modified	Status
-------------	------	---------------	--------

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.

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.

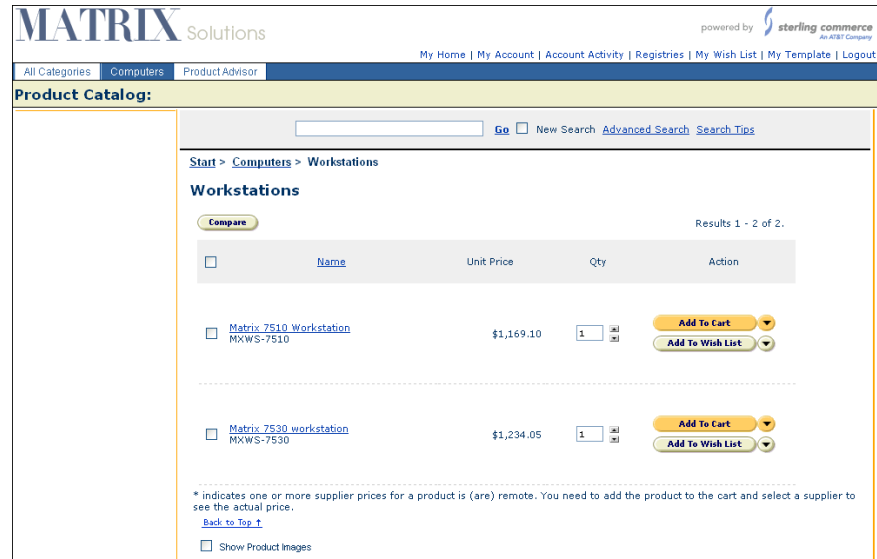


FIGURE 85. Browsing the Product Catalog

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.

Storefront Administration

In this lesson, you learn how to create a child storefront of the tenant storefront, Matrix, and how to administer that child storefront.

Storefront administration involves the following tasks:


- Creating a Storefront
- Creating a Storefront Administrator
- Creating Additional Storefront Administrators
- Setting Default Storefront Preferences
- Setting Storefront Business Rules
- Opening the Enterprise Product Category to Child Storefronts
- Creating Product Sub-Categories
- Creating Price Lists
- Creating a Storefront Partner
- Creating a Storefront Partner Administrator
- Creating a Storefront Partner User
- Setting User Preferences
- Creating Attributes

- Creating Segments
- Creating Storefront Product Entitlements
- Creating Pricing Rules and Coupons
- Creating Promotions
- Creating Mailing Lists
- Creating Campaigns

Creating a Storefront

1. Click the **Admins Login Here** link on the Matrix home page, then log in to the Sterling Multi-Channel Selling Solution as the **ajones** user (password: **ajones**).

The administration home page displays as shown in the following figure.

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An AT&T Company

Administration

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

Welcome Alison Jones

Commerce Activity

- [Task Management](#)

Product and Catalog Administration

- [Product Master](#)
- [Configuration Models](#)
- [Advisor Flow & Questionnaires](#)
- [Product Entitlements](#)

Pricing Administration

- [Price Lists](#)
- [Pricing Rules](#)
- [Promotions](#)
- [Coupons & Promotional Prices](#)

Channel Management

- [Organization Lookup](#)
- [Campaigns](#)
- [Partner Programs](#)
- [Partner Program Preapprovals & Claims](#)
- [Mailing Lists](#)

System Administration

- [System Users](#)
- [View your Organization Profile](#)
- [Job Scheduler](#)
- [System Services](#)
- [Business Rules](#)

SKU Mapping and Availability Administration

- [Upload & Maintain Products](#)
- [Upload & Maintain Product Inventory Information](#)

Search for Organization by Name

Profile Name [Go](#)

[Advanced Search](#)

Search for User by Name

Username

First Name

Last Name [Go](#)

[Advanced Search](#)

My Tasks

Task ID	Name	Last Modified	Status
More			

[Advanced Search](#)

Team's Tasks

Task ID	Name	Last Modified	Status
More			

[Advanced Search](#)

FIGURE 86. Administration Home Page as seen by the ajones User

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

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

Profile List:

Search for Profiles

Name Search Show All Advanced Search

Export List Create Storefront Create Profile

<input type="checkbox"/>	Name ↓	Root Profile Name	Type	Level
<input type="checkbox"/>	AnonymousUserPartner		AnonymousUserPartner	Tin
<input type="checkbox"/>	Bellisima		Distributor	Gold
<input type="checkbox"/>	SomeCom		OEM	Platinum
<input type="checkbox"/>	FirstCommerce		Retailer	Platinum
<input type="checkbox"/>	Halong Systems		Reseller	Gold
<input type="checkbox"/>	Matrix Solutions Inc. (*)		Enterprise	Enterprise
<input type="checkbox"/>	PaoliData		Reseller	Platinum
<input type="checkbox"/>	RegisteredUserPartner		RegisteredUserPartner	Silver

(*) denotes a Storefront

FIGURE 87. Profile List Page

The organizations in the list are the one that you created in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users". Notice that there is a "[*]" next to Matrix Solutions Inc. to indicate that this is a storefront.

3. Click **Create Storefront**.

Profile Manager

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

Organization Profile: New Profile

Return to List

Create

Cancel Save

Please enter mandatory profile information. Once this profile has been saved, you will be allowed to enter more information.
NOTE: (*) Items are required.

General Information

Profile name *

Main telephone

Main facsimile

Profile type *

Enterprise

Profile level *

Enterprise

XSL Message Version

5.0/SL 4.0

Login/Password required

☒

Organization website address

Organization Email

Distributors

Select to add

Remove

Message URL

Content Type

Custom Field #1

Custom Field #2

Custom Field #3

Custom Field #4

Custom Field #5

Enter Organization ID

Organization ID *

Addresses

Address line 1 *

Address line 2

City *

State/Province and Postal code

Country *

USA

Enter Skin Choices

Creation of a Storefront involves creation of at least one skin for that Storefront. A skin allows you to enter the URL to access the Storefront. Once you have created a Storefront you can create other skins or edit this skin to upload a logo and a stylesheet file. This will allow you to customize the look for the Storefront.

*skin url (the name used in the URL to access this skin)

FIGURE 88. Create New Storefront Page

4. Enter information for the new profile as shown in the following table.

TABLE 24. New Storefront Information

Field	Value
Profile name	AllNet Corp
Organization ID	M00212G
Address Line 1	4945, Central Ave.
Address Line 2	First Floor
City	Mill Valley
State/Province and Postal code	CA/94941

TABLE 24. New Storefront Information

Field	Value
Country	USA
Skin Url (the name used in the URL to access this skin)	allnet

- Click **Save**.
- The Profile Detail page displays with new tabs.
- Click the **Commerce** tab.

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An AT&T Company

Profile Manager

My Home | My Account | About | Help | Logout

Organization Profile: AllNet Corp [Return to List](#)

Info Addresses Detail Business Hierarchy **Commerce** Assigned To Notes

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

[GC Payment Gateway](#) [EC Payment Gateway](#)

Payment and Shipping Options

Please select atleast one Payment option and atleast one Shipping option.

Payment Options

☐ Credit card

☐ Visa

☐ MasterCard

☐ American Express

☐ Discover

☐ Account

☐ Gift card

Shipping Options

☐ Standard Shipping

☐ Premium 2-Day

☐ Express Overnight

Pricing Options

Are prices stored remotely? ☐

Enter expiry time in hours. Leave this field blank if prices should never expire once retrieved.

[Create New Skin](#)

Id	Logo	
allnet		edit delete

FIGURE 89. Profile Detail Page: Commerce Tab

- Under the **Payment Options** panel, check Account.
- Under the **Shipping Options** panel, check Standard Shipping and Premium 2-Day.

10. Click **Edit** next to the skin ID.

The Edit Skin page displays. Use this page to upload the logo and CSS file for the AllNet skin. A skin is a combination of logo, CSS, and URL.

The screenshot shows the 'sterling commerce' logo and 'Profile Manager' header. A navigation bar includes links for 'My Home', 'My Account', 'About', 'Help', and 'Logout'. The main title is 'Organization Profile: AllNet Corp' with a 'Return to List' link. The page contains a form titled 'Enter Skin Choices' with instructions: 'Edit this skin to upload a logo and a stylesheet file or change the URL to access this skin.' The form has two main sections. The first section, 'Upload Logo Image to Server', includes a text area for the logo path, a 'Browse...' button, an 'Upload' button, and a 'Preview Logo' section with a 'Preview' button. The second section, 'Upload a Stylesheet (CSS) file to Server', includes a dropdown menu set to 'United States', a text area for the CSS file path, a 'Browse...' button, and an 'Upload' button. At the bottom, there is a field for '*Skin URL (the name used in the URL to access this skin)' with the value 'allnet' entered.

FIGURE 90. Edit Skin Page

11. In the **Upload Logo Image to Server** field, specify the path to a folder that contains the storefront logo. For example, if you have loaded the Matrix storefront data, you can find the logos in your servlet container's **Sterling/htdocs/partnerlogos** directory. Alternatively, you can browse to the location where the image is kept by clicking **Browse...**
12. Click **Upload**.

The logo pathname displays in the Logo URL or Uploaded File Path field.
13. Upload a stylesheet file by specifying the path to a folder that contains the CSS file. If you do not specify a CSS file, the Matrix storefront's CSS is used.
14. Click **Save**.
15. Click **Return to List**.

Creating a Storefront Administrator

Now that you have created a storefront, you will create an administrator for this storefront. A storefront administrator is responsible for maintaining the profile of the storefront as well as its users.

1. Click the **AllNet Corp** link.

The Profile Detail page displays.

2. Click **View Users**.

The User List page displays.

The screenshot shows the Sterling Commerce Administration interface. At the top, the Sterling Commerce logo and 'Administration' title are visible. A navigation bar includes links for 'My Home', 'My Account', 'About', 'Help', and 'Logout'. Below this, a yellow banner displays 'User List: AllNet Corp'. A search section titled 'Find users that match:' contains a dropdown menu set to 'Username', a text input field, and buttons for 'Search', 'Show All', and 'Advanced Search'. Below the search section, it states 'AllNet Corp: All users shown' and features a 'Create User' button. A table with columns 'Username', 'Full Name', 'Functions', 'Manager', 'Profile', 'Business Phone', and 'Email Address' is shown, but it contains no data rows, with the text 'No Rows Found' centered below it. At the bottom left is a 'Back to Top' link, and at the bottom right is a note: '[*] denotes a Storefront'.

FIGURE 91. User List Page

3. Click **Create User**.

sterling commerce

Administration

My Home | My Account | About | Help | Logout

Create New User

Info

Belongs To: AllNet Corp

Cancel Save

NOTE: (*) items are required.

<div>User Information</div> <div>Username *</div> <div>Password *</div> <div>Confirm Password *</div> <div>Title</div> <div>First name *</div> <div>Last name *</div> <div>Job Title</div> <div>Email *</div> <div>Department name</div> <div>Department description</div> <div>Phones</div> <div>Business</div> <div>Remove</div> <div>Away</div>	<div>User Locale</div> <div>Preferred Locale</div> <div>United States</div> <div>Note: changes to Preferred Locale will take effect on the next login.</div>	<div>User Functions</div> <div>Manager</div> <div>User Type</div> <div>User</div> <div>Functions</div> <div>Commerce</div> <div>Sales</div> <div>Sales Executive</div> <div>Program Management</div> <div>Channel Executive</div> <div>Financials</div> <div>Lead Administration</div> <div>Basic Profile Maintenance</div> <div>Profile Administration</div> <div>Offline Access</div> <div>Product Review Administration</div> <div>Marketing Manager - Segmentation</div> <div>Marketing Manager - Campaigns</div>	<div>Spending Limits & Approver</div> <div>Feature requires both Spending Limit and Approver.</div> <div>Spending Limit</div> <div>USD</div> <div>Approver</div> <div>Proxy for Approver</div>
--	--	---	--

FIGURE 92. Create New User Page

4. Enter the following information about the user:
 - Username: bbunson
 - Password: bbunson
 - Confirm Password: bbunson
 - Title: Mr
 - First Name: Brad
 - Last Name: Bunson
 - Email: bbunson@farcom.com
5. Under the **User functions** panel, select the Manager, Program Management, Profile Administration, and Marketing Manager - Segmentation checkboxes.

6. Click **Save**.

The User Detail page displays with new tabs as shown in the following figure.

The screenshot shows the 'User Detail for Brad Bunson' page in the Sterling Commerce Administration interface. The page has a header with the Sterling Commerce logo and 'Administration' text. Below the header is a navigation bar with tabs: Info, Addresses, Preferences, Attributes, and Notes. The 'Info' tab is selected. The page displays various user information fields, including Username (bbunson), Password, Confirm Password, Title (Mr.), First name (Brad), Last name (Bunson), Job Title, Email (bbunson@farcom.com), Department name, Department description, Phones, and Away status. There are also sections for User Locale (Preferred Locale: United States), User Functions (Manager, User, Commerce, Sales, Sales Executive, Program Management, Channel Executive, Financials, Lead Administration, Basic Profile Maintenance, Profile Administration, Offline Access, Product Review Administration, Marketing Manager - Segmentation, Marketing Manager - Campaigns), Status (Open), and Spending Limits & Approver.

FIGURE 93. User Detail Page

7. Click the **Addresses** tab.

8. Enter the following address information:

- Address Line 1: 4945 Central Ave.
- Address Line 2: First Floor
- City: Mill Valley
- State/Province and Postal Code: CA/94941
- Country: USA
- Select the Use as Ship To Address checkbox. A new checkbox appears for Set As Default Ship To Address. Select this checkbox as well.

9. Click **Save**.
10. Click **Logout**.
11. Notify the new storefront administrator of the storefront URL, the administrator's username and password.

Creating Additional Storefront Administrators

Now that you have created a storefront administrator (Brad Bunson), you can log in as this storefront administrator and create more users for the storefront. These users are also referred to as storefront administrators.

1. Log in to the storefront administration home page by pointing your browser to the appropriate URL. The URL for the AllNet storefront looks similar to the following:

`http://<server>:<port>/Sterling/en/US/enterpriseMgr/<skin>`

The AllNet home page displays as shown in the following figure.

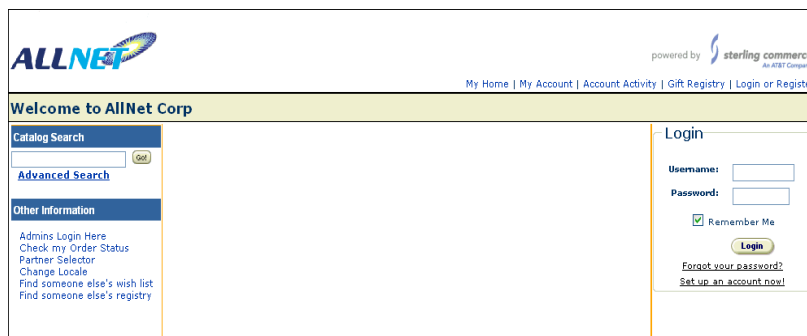


FIGURE 94. AllNet Home Page

2. Click the **Admins Login Here** link and log in as Brad Bunson (bbunson/bbunson).

The AllNet administration home page displays as shown in the following figure.

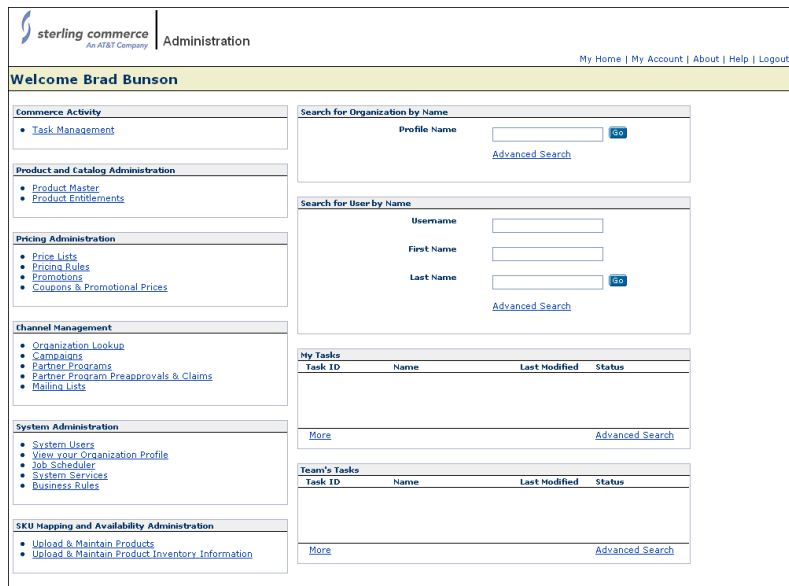


FIGURE 95. AllNet Home Page as seen by Brad Bunson

Notice that except for the absence of the **Configuration Models** link and the **Advisor Flows and Questionnaires** link, the AllNet administration home page is similar to the Matrix administration home page.

3. Click **System Users** under the System Administration panel.

The **User List** page displays similar to Figure 91 on page 107.



Administration

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

User List: AllNet Corp

Find users that match:

Username

Search Show All Advanced Search

AllNet Corp: All users shown

Create User

Username	Full Name	Functions	Manager	Profile	Business Phone	Email Address
bbunson	Bunson, Brad	Profile Administration, Program Management	Yes	AllNet Corp. [*]		bbunson@farcom.com

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

FIGURE 96. User List Page

4. Click **Create User**.

The **Create New User** page displays as shown in Figure 92 on page 108.

5. Enter the following information about the user:

- Username: mhailey
- Password: mhailey
- Confirm Password: mhailey
- Title: Ms
- First Name: May
- Last Name: Hailey
- Email: mhailey@farcom.com

6. Under the **User functions** panel, select the Commerce, Sales Executive, and Profile Administration checkboxes.

7. Click **Save**.

8. Click **My Home** to return to the home page.

Setting Default Storefront Preferences

When you create the AllNet storefront, the storefront is automatically assigned the following default preferences, which are specified in the

CMGT_USER_PROPERTY, CMGT_USER_PROPERTY_LOCALE, and CMGT_USER_PROPERTY_UI_HINT tables.

- User Cart Mode: **Multiple Carts**
- Shopping Cart Display: **Simple View**
- Checkout Type: **Single Step**
- Home Page View: **Portal View**
- Sold-To Address: **Yes**
- Availability: **Yes**
- Delivery Date: **Yes**
- Taxable: **Yes**
- Availability Text Display: **Display Number Available**

However, you can override these default preferences for the storefront.

For the purpose of this tutorial, you will modify the values of the following user preferences:

- User Cart Mode: **Single Cart**
- Home Page View: **Catalog View**

To modify the preferences for the AllNet storefront, perform the following steps:

- For Oracle:
 - a. Find the CMGT_USER_PROPERTY table in the database.
 - b. Under the VALUE column of the userCartMode property, enter Single_Cart. Similarly, enter Catalog_View under the VALUE column of the homePageView property.
 - c. Restart your server.
- For SQL Server 2005:
 - a. To modify the value of the User Cart Mode user preference to Single Cart, execute the following SQL statement against the database:

```
update CMGT_USER_PROPERTIES set value='Single_Cart'
where name='userCartMode'
```
 - b. To modify the value of the Home Page View user preference to Catalog View, execute the following SQL statement against the database:

```
update CMGT_USER_PROPERTIES set value='Catalog_View'
where name='homePageView'
```

- c. Click **Logout** on the AllNet administration home page.

Log in to the AllNet administration home page. The home page displays, similar to the following figure.

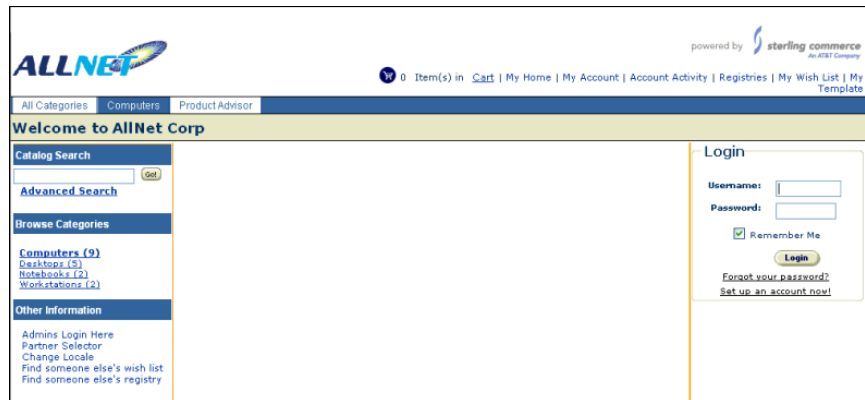


FIGURE 97. AllNet Home Page with Modified Preferences

Compare this page with the home page shown in Figure 94 on page 110.

Setting Storefront Business Rules

In this section, you set business rules that are specific to the AllNet storefront. When you create the AllNet storefront, you get by default the business rules settings of the tenant (Matrix) storefront. You can override these business rules and set them afresh.

For the purpose of this tutorial, you will set the values of the following business rules for the Saved List property:

- Enable Alternative items link in: Templates, Wish Lists, Registries, Cart
 - Enable Complementary items in: Templates, Wish Lists, Registries
1. Click the **Business Rules** link under the System Administration panel.

The **Business Rules** page displays.

2. Click the **Saved List** link.

The Business Rules page redisplay with the business rules and their default values on the right panel.

FIGURE 98. Business Rules Page with Default Values

3. Select the following checkboxes for the **Enable Alternative items link in** business rule:
 - **Templates**
 - **Wish Lists**
 - **Registries**
 - **Cart**
4. Select the following checkboxes for the **Enable Complementary items link in** business rule:
 - **Templates**
 - **Wish Lists**
 - **Registries**
5. Click **Save**.
6. Click **My Home** to return to the home page.

Opening the Enterprise Product Category to Child Storefronts

A child storefront administrator can create product sub-categories within the product categories of the tenant storefront only if the tenant administrator opens the product category to the child storefront.

In this section, you learn how to open up the **Computers** category and its sub-categories, **Desktops** and **Workstations**, to the AllNet storefront.

1. Point your browser to the Matrix home page and click the **Admins Login Here** link, and then log in as the ajones user.
2. On the Matrix administration home page, click **Product Master** under the Product and Catalog Administration panel.

The Product Manager page displays.

3. Click **Computers**.
4. Click the **Access Control** tab.

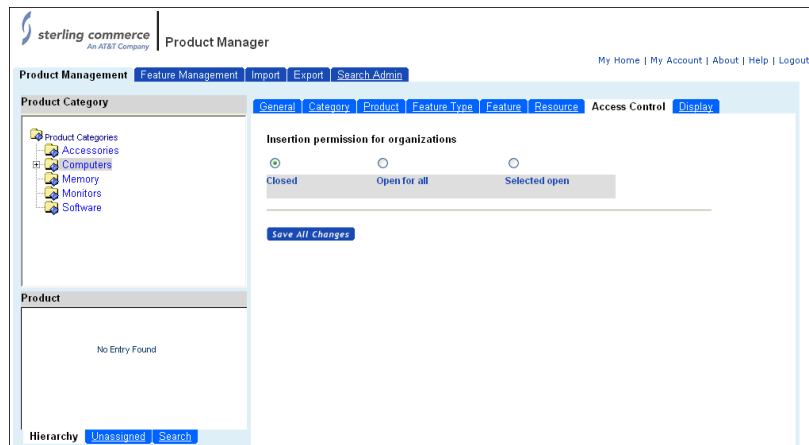


FIGURE 99. Product Manager Page: Access Control Tab

5. Click the **Selected Open** radio button.

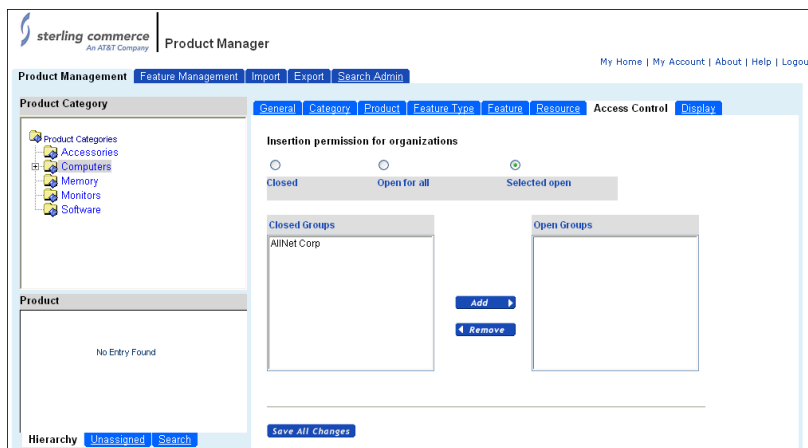


FIGURE 100. Access Control Page

Notice that there are two panels: Closed Groups and Open Groups. You can see that AllNet Corp is listed under Closed Groups.

6. Click **AllNet Corp**, then click **Add**.
7. Click **Save All Changes**.
8. Click the **Desktops** category and repeat Step 4 to Step 7.
9. Click the **Workstations** category and repeat Step 4 to Step 7.
10. Click **Logout**.

Creating Product Sub-Categories

Now that the Computers product category and its sub-categories are open to the AllNet storefront, the AllNet storefront administrator can create sub-categories within these categories.

In this section, bbunson creates a sub-category, **Notebooks**, under the **Computers** category.

1. Log in to the AllNet home page, then click the **Admins Login Here** link and log in as bbunson.

2. On the AllNet Administration home page, click **Product Master** under the **Product and Catalog Administration** panel.

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

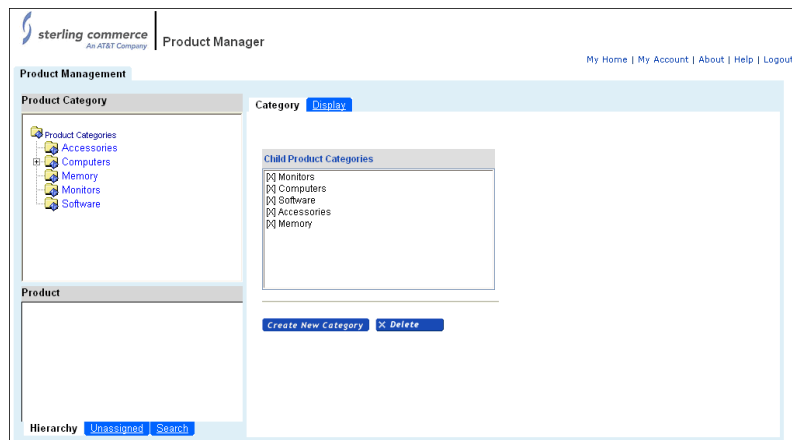


FIGURE 101. Product Manager Page as seen by Brad Bunson

Compare the Product Manager page as seen by the ajones user and the bbunson user. Notice that bbunson does not have some of the functions that ajones has. For example, bbunson cannot generate a search index. Therefore, you must make sure that you log in as ajones and generate a search index every time you make changes to the product catalog.

3. Click the **Computers** category.
4. Click the **Category** tab.

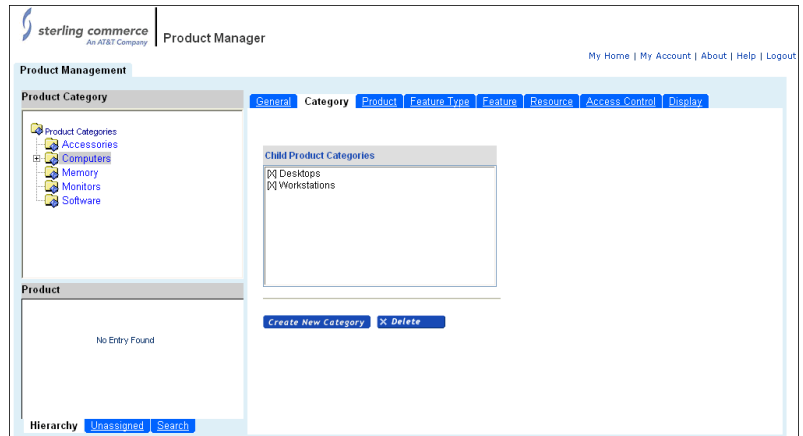


FIGURE 102. Product Manager Page: Category Tab

5. Click **Create New Category**.
6. Enter the following information:
 - Product Category Name: Notebooks
 - Description: Notebooks for all your needs.
 - Image URL: Enter an image URL (for example, ../images/notebook1.jpg)
7. Click **Save All and Return to List**.
8. Click the node next to **Computers** to expand its list of categories.
9. Click **Notebooks**.
10. Click the **Product** tab.
11. Click **Create New Product**.

The screenshot shows the Sterling Commerce Product Manager interface. The 'Product' tab is active, displaying a form for creating or editing a product. The 'Product Category' tree on the left has 'Notebooks' selected. The 'Product' list below the tree is empty, showing 'No Entry Found'. The form fields include: Product ID, Product Name, Description, Component Type (Normal), Component Sub Type, Status (In Creation), Start Date (1/25/2008), and End Date (1/25/2108). At the bottom, there are buttons for 'Save and Return' and 'Cancel and Return'.

FIGURE 103. Product Tab with New Fields

12. Enter the following information:

- Product ID: ANLP-7410
- Product Name: AllNet 7410 Notebook
- Description: A reliable solution that is reasonably priced and is power-packed with features.
- Component Type: Normal
- Status: Released
- Start Date: Enter the current date
- End Date: Enter a date 100 years from the current date.

13. Click **Save and Return**.

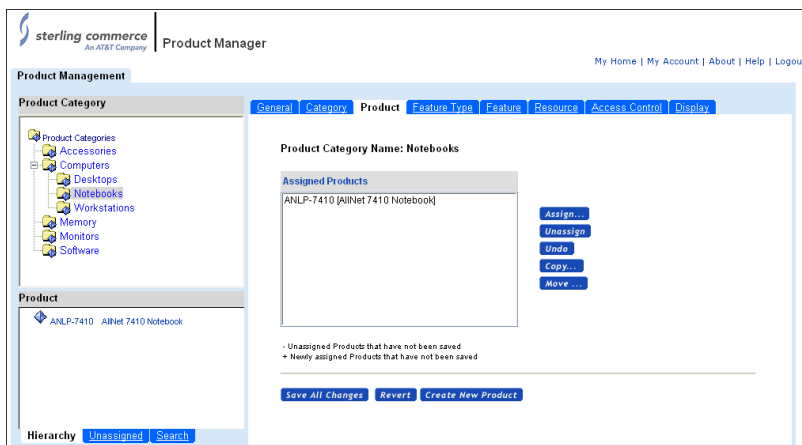


FIGURE 104. Product Tab with New Product

14. In the lower left Product panel, click ANLP-7410.
15. Click the Sales tab.

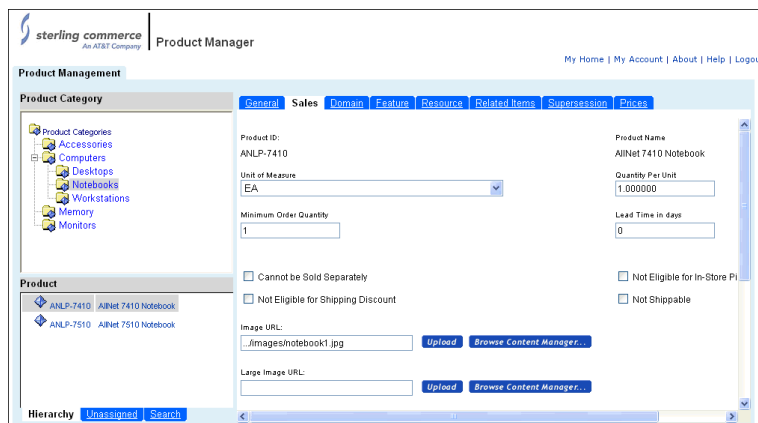


FIGURE 105. Product Detail Page: Sales Tab

16. In the Lead Time in days field, enter **30**.
17. In the Image URL field, enter an image URL (for example, **...images/notebook1.jpg**)

18. Click **Save Changes**.

19. Click **Logout**.

After creating new products, you must regenerate the product index to allow your customers to search for the products. To generate the product index, use the steps mentioned in "Generating a Product Index" on page 42. You must remember that only the ajones user can generate a search index for the AllNet storefront.

Exercise

Create another product with the following information:

- Product ID: ANLP-7510
- Product Name: AllNet 7510 Notebook
- Description: A highly power-packed solution
- Component Type: Normal
- Status: Released
- Start Date: Enter the current date
- End Date: Enter a date 100 years from the current date.

When you complete this exercise, the Product Manager page appears as shown in the following figure.

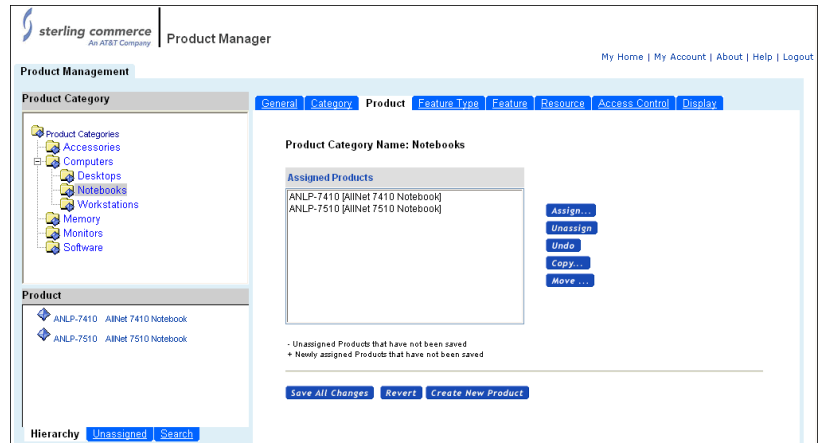


FIGURE 106. Product Manager Page

Creating Price Lists

In this section, you learn how to create a price list, assign products to that price list, and assign the price list to organizations to allow their users to buy the products.

1. Log in as the **bbunson** user and click **Price Lists** under the Pricing Administration panel.

The New Price List page displays as shown in the following figure.

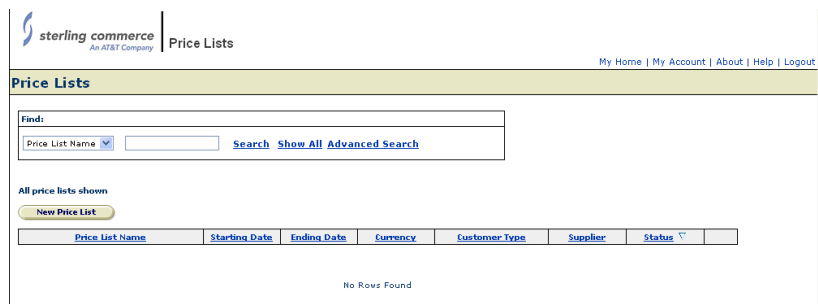


FIGURE 107. New Price List Page

2. Click **New Price List**.

The screenshot shows the 'New Price List' form in the Sterling Commerce application. The form is titled 'New Price List' and includes a 'Go to Price Lists' link. It features a 'Price List Header' section with the following fields:

- * Name: [Text input field]
- Description: [Text input field]
- * Currency: [Dropdown menu]
- * Customer Type: [Dropdown menu]
- * Supplier: [Text input field] [Assign... button]
- * Starting Date: [Date input field] [Time input field: 0:00]
- * Ending Date: [Date input field] [Time input field: 0:00]
- Active: [Checkbox]

The 'Create' button is highlighted in yellow. The form also includes a 'Cancel' button and a '*Required Fields' label.

FIGURE 108. New Price List Header Information

3. Enter the following information:
- Name: AllNet Price List for All
 - Description: Price list for all kinds of customers
 - Currency: USD
 - Customer Type: General
 - Supplier: AllNet Corp
 - Starting Date: Enter the current date
 - Ending Date: Enter a date one year from the current date
4. Select the Active checkbox.
5. Click **Create**.

The **Price List Detail** page displays as shown in the following figure.

sterling commerce
An AT&T Company

Price Lists

My Home | My Account | About | Help | Logout

AllNet Price List for All [Go to Price Lists](#)

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

Make a duplicate of this price list by using the Copy button. The Download button provides the ability to download this price list as tab delimited file. After changing price list header information save changes using the Save button. Click on the Assign All button to assign this price list to all organizations in the system. Click on the Unassign All button to remove all current assignments of this price list.

[Assign All](#) [Unassign All](#) [Download](#) [Copy](#) [Save](#)

*Required Fields

Price List Header

* Name: AllNet Price List for All

Description: Price list for all kinds of customers

* Currency: USD

* Customer Type: General

* Supplier: AllNet Corp [Assign...](#)

* Starting Date: 1/28/2008 0:00

* Ending Date: 1/28/2009 0:00


Active: ☒

FIGURE 109. Price List Detail Page

- Click the **Assign All** button to assign the price list to all the organizations available in the system: AllNet Corp, AnonymousUserPartner, and RegisteredUserPartner. Assigning the price list to the organizations is necessary to enable the users of the organizations to browse the catalog and buy products.

However, you must remember that a storefront administrator cannot assign a price list to an enterprise partner, and only the tenant administrator can perform this task. For example, if you want to assign the **AllNet Price List for All** price list to the organization Bellissima that you had created in LESSON 4, "Creating Partners, Partner Administrators, and Partner Users", you must log in as the ajones user and assign the price list using the **Pricelists** tab on the Bellissima Profile Detail page.

- Click the **Assign Products** tab to assign the AllNet 7410 Notebook (Product ID: ANLP-7410) that you had created in "Creating Product Sub-Categories" on page 117.
- Select Product ID from the drop-down list and enter "*", then click **Search**.



Price Lists

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

AINet Price List for All
[Go to Price Lists](#)

[Edit Header](#)
[Edit Items](#)
[Assign Products](#)
[Mass Update](#)
[View Organization Assignments](#)

Find:

Product ID

☐ 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"/>	ANLP-7410	AINet 7410 Notebook							
<input type="checkbox"/>	ANLP-7510	AINet 7510 Notebook							
<input type="checkbox"/>	MXDS-7490	Matrix 7490 Desktop							
<input type="checkbox"/>	MXDS-7510	Matrix 7510 Desktop							
<input type="checkbox"/>	MXDS-7520	Matrix 7520 Desktop							
<input type="checkbox"/>	MXDS-7550	Matrix 7550 Desktop							
<input type="checkbox"/>	MXDS-7600	Matrix 7600 Desktop							
<input type="checkbox"/>	MXWS-7510	Matrix 7510 Workstation							
<input type="checkbox"/>	MXWS-7530	Matrix 7530 Workstation							

Back to Top


FIGURE 110. Assign Products Tab with Search Results

9. Enter the prices for the products using the information in the following table.

TABLE 25. Entries for Prices

Product	List Price	+/- in %	+/- in Abs.
ANLP-7410	1999.00	10	5
ANLP-7510	1999.00	-10	5
MXDS-7490	1999.00		-5
MXDS-7510	1999.00	-5	
MXDS-7520	1999.00	-10	
MXDS-7550	1999.00		-5
MXDS-7600	1999.00	-10	
MXWS-7510	1999.00	-10	
MXWS-7530	1999.00	-5	

10. Select the checkbox next to Product ID to select all the products, then click **Assign**.



Price Lists

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

AllNet Price List for All

[Go to Price Lists](#)

[Edit Header](#)
[Edit Items](#)
[Assign Products](#)
[Mass Update](#)
[View Organization Assignments](#)

Find:

Category

Search

☒ 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"/>	ANLP-7410	AllNet 7410 Notebook				1999.000000	10.000000	5.000000	2,203.90
<input type="checkbox"/>	ANLP-7510	AllNet 7510 Notebook				1999.00	-10	5	1,804.10
<input type="checkbox"/>	MIDS-7490	Matrix 7490 Desktop				1999.00	-5		1,894.00
<input type="checkbox"/>	MIDS-7510	Matrix 7510 Desktop				1999.00	-5		1,899.05
<input type="checkbox"/>	MIDS-7520	Matrix 7520 Desktop				1999.00	+10		1,799.10
<input type="checkbox"/>	MIDS-7550	Matrix 7550 Desktop				1999.00		-5	1,994.00
<input type="checkbox"/>	MIDS-7600	Matrix 7600 Desktop				1999.00	-10		1,799.10
<input type="checkbox"/>	MIWS-7510	Matrix 7510 Workstation				1999.00	-10		1,799.10
<input type="checkbox"/>	MIWS-7530	Matrix 7530 Workstation				1999.00	-5		1,899.05

[Back to Top](#)

FIGURE 111. Assign Products Tab with Prices of Products

- Click **Go to Price Lists**.

The AllNet Price Lists page displays.

- Click **My Home** to return to the home page.

After creating a price list, you must regenerate the search index to allow users to see the prices of the products.

Creating a Storefront Partner

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

The Profile List page displays.

- Click **Create Profile**.

- Enter information as shown in the following table.

TABLE 26. New Profile Entries

Field	Value
Profile name	ITech Solutions
Profile type	Retailer
Profile level	Gold

TABLE 26. New Profile Entries

Field	Value
Organization ID	IT-23512
Address Line 1	123, Park Street
City	Richmond
State/Province and Postal code	VA/94941
Country	USA

4. Click **Save**.

The Profile Detail page for ITech Solutions displays with new tabs as shown in the following figure.

The screenshot displays the Sterling Commerce Profile Manager interface for the organization 'ITech Solutions'. The page is divided into several sections:

- General Information:** This section contains various input fields for the organization's details. Fields include 'Profile name' (ITech Solutions), 'Main telephone' (N/A), 'Main facsimile' (N/A), 'Profile type' (Retailer), 'Profile level' (Sold), 'XML Message Version' (XML 4.0), 'Login/Password required' (checked), 'Organization website address', 'Organization Email', 'Distributors' (with a 'Select to add' dropdown and a 'Remove' button), 'Message URL', 'Content Type', and five 'Custom Field' entries (Custom Field #1 through #5).
- Profile Status:** This section includes a 'Status' dropdown menu (set to Open) and a 'Reason' text area for entering a reason when changing the status.
- Accounts:** This section contains fields for 'Currency' (USD), 'Credit limit' (\$0.00), 'Available credit' (\$0.00), 'Co-op %' (0.000), and 'Co-op Account Maximum' (0.00). It also features a 'View Account Details' button and a 'PDF' icon.

At the top of the page, there is a navigation bar with links for 'My Home', 'My Account', 'About', 'Help', and 'Logout'. Below the navigation bar, there is a tabbed interface with tabs for 'Info', 'Addresses', 'Detail', 'Business', 'Hierarchy', 'Commerce', 'Assigned To', 'Pricelists', 'Product Entitlements', and 'Attributes'. The 'Detail' tab is currently selected.

FIGURE 112. Profile Detail Page for ITech Solutions

5. Click the **Business** tab.
6. From the Territories drop-down list, select North America.
7. From the Customer Types drop-down list, select the following:
 - General
 - Government
 - Commercial
 - Pharmaceutical
 - Telecommunications
 - High Technology
 - Education
8. Under the Contracts panel, enter the following information about business agreements between AllNet Corp and ITech Solutions:
 - Name: ABC-245ST
 - Type code: XYZ-7890
9. Click **Save**.

The screenshot shows the Sterling Commerce Profile Manager interface. The top navigation bar includes the Sterling Commerce logo and the text "Profile Manager". Below this is a green header bar with the text "Organization Profile: ITech Solutions" and a "Return to List" link. The main navigation tabs are Info, Addresses, Detail, Business (selected), Hierarchy, Commerce, Assigned To, Pricelists, Product Entitlements, and Attributes. The Business tab is active, showing a "Business" section with three panels: Product Categories, Territories, and Customer types. The Product Categories panel has a "Select To Add" dropdown and a "Delete" button. The Territories panel has a dropdown menu with "North America" selected and a "Delete" button. The Customer types panel has a dropdown menu with "Education" selected and a "Delete" button. Below these panels is the "Contracts" section, which includes a "Delete Duplicate Previous 1 out of 1 Next" bar. A note states: "NOTE: (*) items are required when creating a contract." The contract details are as follows:

Name	Active date(M/D/YYYY)	Volume commitment (YR)
ABC-245ST		
Type code *	End date(M/D/YYYY)	Volume commitment (QTR)
XYZ-7890		
Agreement date(M/D/YYYY)		

There is also a "Notes" section with a text area and a "Save" button.

FIGURE 113. Profile Detail Page: Business Tab

10. Click the **Pricelists** tab.

The screenshot shows the Sterling Commerce Profile Manager interface. The top navigation bar includes links for 'My Home', 'My Account', 'About', 'Help', and 'Logout'. The main header displays 'Organization Profile: ITech Solutions' with a 'Return to List' link. Below this is a tabbed interface with tabs for 'Info', 'Addresses', 'Detail', 'Business', 'Hierarchy', 'Commerce', 'Assigned To', 'Pricelists' (selected), 'Product Entitlements', and 'Attributes'. The 'Pricelists' tab contains a 'Notes' section with instructions: 'Select appropriate price list for assignment and click Save button to save changes. \$ indicates the price list inherited from parent.' Below the notes are three buttons: 'View Users', 'View Account Activity', and 'Save'. A table lists price lists with columns: Assign, Shareable, Price List Name, Starting Date, Ending Date, Currency, Customer Type, Supplier, and Status. The first row shows an unchecked 'Assign' checkbox, an unchecked 'Shareable' checkbox, the name 'AllNet Price List for All', and dates '2/8/2008' and '2/8/2009'. The currency is 'USD', customer type is 'General', supplier is 'AllNet Corp', and status is 'Active'.

Assign	Shareable	Price List Name	Starting Date	Ending Date	Currency	Customer Type	Supplier	Status
<input type="checkbox"/>	<input type="checkbox"/>	AllNet Price List for All	2/8/2008	2/8/2009	USD	General	AllNet Corp	Active

FIGURE 114. Profile Detail Page: Pricelists Tab

11. Select the checkbox next to AllNet Price List for All, then click **Save**.

Creating a Storefront Partner Administrator

In this section, you create an administrator for the partner you just created. This partner administrator is responsible for profile maintenance of the partner and its users.

1. Click **View Users**.
The User List page displays.
2. Click **Create User**.
3. Enter information as shown in the following table:

TABLE 27. Entries for New User

Field	Value
Username	rjones
Password	rjones
Confirm Password	rjones
Title	Ms
First Name	Rosy
Last Name	Jones
Email	rjones@itech.com

4. Select the **Manager** checkbox.

5. Select the **Profile Administration** function.
6. Click **Save**.

The screenshot shows the 'User Detail for Rosy Jones' page in the Sterling Commerce Administration interface. The page has a header with the Sterling Commerce logo and navigation links. Below the header, there are tabs for 'Info', 'Addresses', 'Preferences', 'Attributes', and 'Notes'. The 'Info' tab is selected, showing details for Rosy Jones, who belongs to 'Itech Solutions'. The page is divided into several sections: 'User Information' with fields for Username, Password, Confirm Password, Title, First Name, Last Name, Job Title, Email, Department Name, and Department Description; 'User Locale' with a Preferred Locale dropdown; 'User Functions' with checkboxes for Manager, User, Commerce, Commerce Executive, Sales, Sales Executive, Financials, Marketing Executive, Basic Profile Maintenance, Profile Administration (checked), Offline Access, and Product Reviewer; 'Status' with a dropdown for Status (Open) and a text area for Comment; and 'Spending Limits & Approver' with a dropdown for Spending Limit (USD) and a text area for Approver. There are also buttons for 'View Users', 'View Account Activity', and 'Save'.

FIGURE 115. User Detail Page for Rosy Jones

7. Click **Logout**.

Creating a Storefront Partner User

In this section, you learn how to create a user for Itech Solutions.

1. From the **Login** panel, log in as rjones.

The Partner User Home page displays as shown in the following figure.

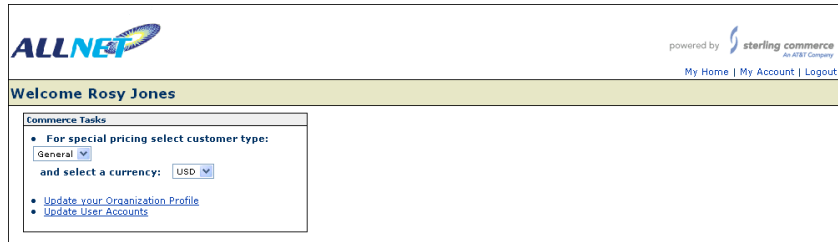


FIGURE 116. Home Page as Seen by the rjones User

2. Click **Update User Accounts**.

3. Click **Create User**.

The User Detail page displays.

4. Enter information as shown in the following table.

TABLE 28. User Detail Header Information

Field	Value
Username	adesai
Password	adesai
Confirm Password	adesai
Title	Ms
First Name	Anita
Last Name	Desai

5. Check the **Commerce** function.

6. Click **Save**.

7. Click **Logout**.

Setting User Preferences

In this section, you learn how to set the user preferences for AllNet users. You must remember that only tenant administrators can set the user preferences for child storefront users.

In this section, you set the following user preferences for the user, May Hailey (mhailey/mhailey):

- User Cart Mode: Single Cart
 - Availability: No
1. Click the **Admins Login Here** link on the Matrix home page, then log in to the Sterling Multi-Channel Selling Solution as the **ajones** user (password: **ajones**).
The administration home page displays.
 2. Click **Go** in the Search for User by Name panel.
The User List page displays.
 3. Click the link for mhailey.
- The User Detail page for mhailey displays as shown in the following figure.

The screenshot shows the 'User Detail for May Hailey' page in the Sterling Commerce Administration interface. The page has a navigation bar with 'Info', 'Addresses', 'Preferences', 'Attributes', and 'Notes' tabs. The 'Info' tab is active. The page displays the following sections:

- User Information:** Includes fields for Username (mhailey), Password (masked), Confirm Password (masked), Title (Ms.), First name (May), Last name (Hailey), Job Title, Email (mhailey@stercom.com), Department name, Department description, Phone (Business), and an 'Add' button. There is also a 'Remove' 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, Sales, Sales Executive, Program Management, Channel Executive, Financials, Lead Administration, Basic Profile Maintenance, Profile Administration (checked), Offline Access, Product Review Administration, Marketing Manager - Segmentation, and Marketing Manager - Campaigns.
- Status:** Includes a 'Status' dropdown set to 'Open', a 'Comment' text area, and a 'Spending Limits & Approver' section. The 'Spending Limit' is set to 'ARS' and the 'Approver' is set to 'ARS'. There is also a 'Proxy for Approvers' checkbox.

FIGURE 117. User Detail Page for mhailey

4. Select the following user preferences:
 - User Cart Mode: **Single Cart**
 - Availability: **No**

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

Creating Attributes

In this section, you learn how to create attribute groups and attributes, and then assign the attributes to users of the AllNet storefront partner, ITech Solutions.

Attributes are assigned to users and/or organizations so that they can be grouped into segments which, in turn, can be targeted for a particular marketing activity.

For the purpose of this tutorial, you will create an attribute group called User Attributes, and under it, attributes called Income Level, Marital Status, and Neighborhood Quality.

1. Log in to the AllNet home page as the bbunson user, and click **Attribute Management** under the User/Profile Attribute Administration panel.
The Attribute Manager page displays.
2. Click **Attribute Groups** on the left pane, and click **New Attribute Group** to create a new attribute group under the root Attribute Groups.
3. Enter User Attributes in the Attribute Group Name and Description fields.
4. Click **Save All Changes**.
5. Expand the + next to Attribute Groups. Notice that the new attribute group is created under the root Attribute Groups.
6. Click **User Attributes**.

The Attribute Groups tab displays.

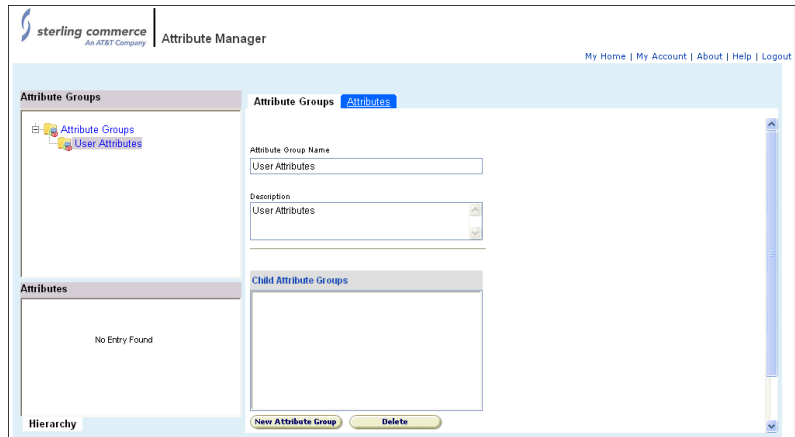


FIGURE 118. Attribute Groups Tab

7. Click the **Attributes** tab.

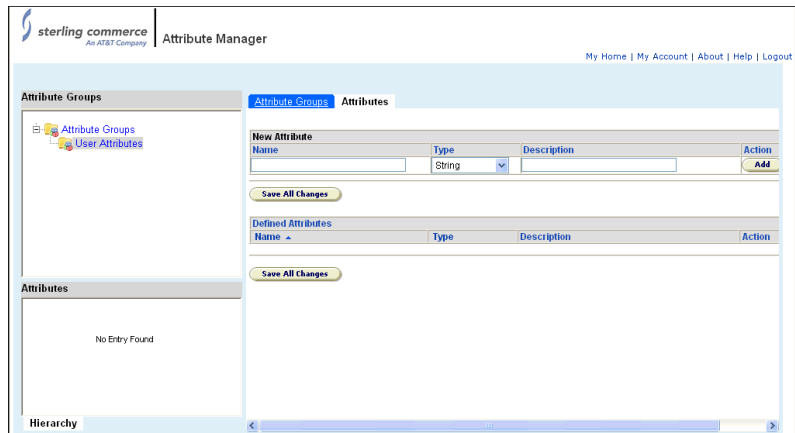


FIGURE 119. Attributes Tab

8. Enter Income Level in the **Name** and **Description** fields.
9. Select **Numeric** from the Type drop-down list.
10. Click **Add**.

11. Repeat Step 6 to Step 10 to create three more attributes, Marital Status, and Neighborhood Quality. Select "String" as the attribute type for Marital Status and Neighborhood Quality.
12. Click **Save All Changes**.
13. Click **Income Level** in the lower left Attributes panel.
The Attribute Detail page displays.

The screenshot shows the Sterling Commerce Attribute Manager interface. The top navigation bar includes the Sterling Commerce logo, the title 'Attribute Manager', and links for 'My Home', 'My Account', 'About', 'Help', and 'Logout'. The main content area is divided into two panels. The left panel, titled 'Attribute Groups', contains a tree view with 'Attribute Groups' and 'User Attributes'. Below this is an 'Attributes' section with a list of attributes: 'Income Level', 'Marital Status', and 'Neighbourhood Quality'. The right panel, titled 'Attribute Detail', has tabs for 'Segment Usage', 'User Assignment', and 'Organization Assignment'. The 'Attribute Name' is 'Income Level' and the 'Attribute Type' is 'Numeric'. The 'Description' is 'Income Level'. Under 'Specify Allowed Values As', the 'Range' option is selected. The 'Allowed Values' field is empty. A 'Save All Changes' button is at the bottom.

FIGURE 120. Attribute Detail Page

Notice the two options to specify allowed values for this attribute. You can either specify the values for a numeric attribute as falling within a range (for example, \$25000-\$50000) or as a minimum value, a maximum value and a step between the two (for example, 5.0-10.0/2). Leave **Range** selected.

14. Enter 25000-50000 in the Allowed Values field.
15. Click **Save All Changes**.
16. Click the **User Assignment** tab.
17. Click **Assign...**
18. From the Hierarchical Entity Picker pop-up, navigate to ITech Solutions. Select its users, Anita Desai and Rosy Jones, and click **Done**.

19. Select 40000 from the Value drop-down list for both the users, and click **Save**.

The User Assignment tab of the Attribute Detail page now appears as shown in the following figure.

User Name	Full Name	Value	Delete
rjones	Jones, Rozy	40000	
adesai	Desai, Anita	40000	

FIGURE 121. User Assignment Tab

20. Click **Marital Status** under the Attributes panel in the lower left pane.
21. Enter Married in the Value and Display Value fields, and click **Add**.
22. Enter Single in the Value and Display Value fields, and click **Add**.
23. Click **Save All Changes**.
24. Repeat Step 16 to Step 17.
25. Select **Single** as the attribute value for adesai, and **Married** for rjones, and click **Save**.
26. Similarly, define two allowed values, **Rural** and **Urban**, for the **Neighborhood Quality** user attribute. Assign this attribute to both adesai and rjones, and select **Urban** as the attribute value for both users.
27. Click **My Home** to return to the home page.

Creating Segments

Segments are storefront-specific groups of users or organizations that share certain attributes or behavior. You can use segments to target marketing activities directly to the users who are most likely to be interested in a promotion or campaign.

1. Still logged in as bbunson, click **Segmentation Management** under the Segmentation Administration panel.

The Customer Segmentation List page displays.
2. Click **New**.

The Customer Segmentation Detail Page displays.

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An AT&T Company

Administration

My Home | My Account | About | Help | Logout

Customer Segmentation: [Go to List](#)

New

Create Cancel

Note: To create your segment, enter the header information and click Create. Once you create the segment, you will be able to define its criteria for membership.

If you want to create a segment that combines attributes and other segments (including multiple behavioral segments), choose segment type Regular. If you want to create a segment based on one behavior, choose segment type Behavioral. If you want to upload a list of the segment members from a file, choose segment type Upload. You cannot change the segment type once it is created, but you can change the other header information.

General Information

Name *
Urban Customers

Description
Urban customers who can afford to own 2 desktops

Start Date (M/D/YYYY) *
2/11/08

End Date (M/D/YYYY) *
2/11/13

Segment Status
In Creation

Segment Type
Regular

FIGURE 122. Customer Segmentation Detail Page: New Tab

3. Enter information using the details in the following table.

TABLE 29. New Segment Information

Field	Value
Name	Urban Customers
Description	Urban customers who can afford to own 2 desktops
Start Date	Enter the current date
End Date	Enter a date 5 years from the current date

4. Notice that the Segment Status is **In Creation**.
5. Leave **Regular** as selected from the Segment Type drop-down list.
6. Click **Create**.

The Customer Segmentation Detail page displays with new tabs.

7. Click the **Criteria** tab.

sterling commerce Administration

My Home | My Account | About | Help | Logout

Customer Segmentation: Urban Customers [Go to List](#)

Header Criteria Membership

Note: This tab allows you to define the criteria by which users are included in or excluded from a segment. You must have inclusions before you can have exclusions.

To add attributes or profile fields, select the desired criterion type from the drop down and click New. This will take you to a new screen where you can define the attributes and field. You can return to this screen once you have finished. To add a segment criterion, select the desired criterion type from the drop down and click New. This will bring up a pop-up picker that allows you to select the segment and add them directly to this screen. To use a behavior, you must first have a behavioral segment defined for the desired behavior. If you haven't defined one, you can define one quickly from here by selecting "New Behavioral Segment" from the drop down list.

Include users who have

Include users who have ☒ All of these ☐ Any of these

User Attribute [New](#)

Criterion Type	Description	Action
----------------	-------------	--------

Exclude users who have


Exclude users who have ☒ All of these ☐ Any of these

User Attribute [New](#)

Criterion Type	Description	Action
----------------	-------------	--------

FIGURE 123. Customer Segmentation Detail Page: Criteria Tab

8. Under the "Include users who have" panel, click **New**.
- The Criteria Tab of the Customer Segmentation Detail Page redisplay.
9. Click **Select**.
 10. From the Hierarchical Entity Picker pop-up, navigate to the Income Level user attribute that you created in the previous section, and click **Done**.
 11. Select \geq from the Operator drop-down list and 30000 from the Value drop-down list.



Administration

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

Customer Segmentation: Urban Customers

Header

Criteria

Membership

Go to List

Add

Cancel

Note: To add an attribute, click Select button. An attribute picker will appear that allows you to choose the desired attributes. Once you have chosen the attribute, select the operator and value of the attribute that you wish to use. **If you want to include multiple values for this attribute, add the same attribute to your segment multiple times, once for each value.**


To add this to your segment, click Add and you will be taken back to your segment with the new attribute added. You can abandon the addition of attributes and return to your segment by pressing "Cancel".

Attribute Name	Operator	Value
Income Level	>=	30000

FIGURE 124. Criteria Tab with Values Selected

12. Click **Add**.
13. Repeat Step 8 to Step 9.
14. From the Hierarchical Entity Picker pop-up, navigate to the Neighborhood Quality user attribute, and click **Done**.
15. Leave Urban as selected from the Value drop-down list, and click **Add**.

The page now appears as shown in the following figure.



Administration

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

Customer Segmentation: Urban Customers

Header

Criteria

Membership

Save

Note: This tab allows you to define the criteria by which users are included in or excluded from a segment. You must have inclusions before you can have exclusions.

To add attributes or profile fields, select the desired criterion type from the drop down and click New. This will take you to a new screen where you can define the attributes and fields. You can return to this screen once you have finished. To add a segment criterion, select the desired criterion type from the drop down and click New. This will bring up a pop-up picker that allows you to select the segments and add them directly to this screen. To use a behavior, you must first have a behavioral segment defined for the desired behavior. If you haven't defined one, you can define one quickly from here by selecting "New Behavioral Segment" from the drop down list.

Include users who have

Include users who have

All of these

Any of these

User Attribute

New

Criterion Type	Description	Action
User Attribute	Income Level >= 30000	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
User Attribute	Neighbourhood Quality = Urban	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

Exclude users who have

Exclude users who have

All of these

Any of these

User Attribute

New

Criterion Type	Description	Action
----------------	-------------	--------

FIGURE 125. Criteria Tab with User Attributes

16. Click the **Header** tab.
17. From the Segment Status drop-down list, select **Active**.
18. Click **Save**.
19. Click **My Home** to return to the home page.

Creating Storefront Product Entitlements

Storefronts use product entitlements to manage their users' access to products. Each product entitlement comprises one or more product entitlement items. A product entitlement item is a list of products. If a product entitlement is assigned to a partner, users belonging to that partner can see the products listed on one or more of the product entitlement items. A product entitlement item can be one of the following types:

- Price List
- Product Category
- Feature

For the purpose of this tutorial, you learn how to create a product entitlement comprising a Product Category item for the AllNet storefront and assign that product entitlement to the ITech Solutions partner.

1. Click **Product Entitlements** under the Product and Catalog Administration panel.

The Product Entitlement List page displays.

2. Click **New**.
3. Enter information using the details in the following table:

TABLE 30. New Product Entitlement Information

Field	Value
Name	Special Prices
Description	Special Prices for All Partners
Supplier	AllNet Corp
Start Date	Enter the current date
End Date	Enter a date 5 years from the current date

4. Select the **Active** checkbox.

5. The Product Entitlement Detail page appears as shown in the following figure.

The screenshot shows the 'Product Entitlement: New' page in the Sterling Commerce Administration interface. The page has a header with the Sterling Commerce logo and navigation links. The main content area contains a form with the following fields:

- Name ***: A text input field.
- Special Prices**: A text input field.
- Description**: A text input field.
- Supplier ***: A dropdown menu with 'AllNet Corp' selected and an 'Assign...' button.
- Start Date (M/D/YYYY) (hh:mm) ***: A date and time picker showing '3/11/2008' and '00:00'.
- End Date (M/D/YYYY) (hh:mm) ***: A date and time picker showing '3/11/2013' and '23:59'.
- Status**: A checkbox labeled 'Active' which is checked.

Buttons for 'Save' and 'Go to List' are also visible.

FIGURE 126. Product Entitlement Detail Page: New Tab

6. Click **Save**.
- The Product Entitlement Detail page displays with new tabs.
7. Click the **Item** tab.
8. Select **Product Category** from the drop-down list and click **New**.
9. From the Hierarchical Entity Picker pop-up, select Desktops and click **Done**.

The Product Entitlement Detail page displays with the Desktops category in the list as shown in the following figure.

The screenshot shows the 'Product Entitlement: Special Prices' page in the Sterling Commerce Administration interface. The page has a header with the Sterling Commerce logo and navigation links. The main content area contains a table with the following columns:

- Name**: The name of the product entitlement.
- Seq.#**: The sequence number.
- Type**: The product category.
- Inclusion/Exclusion**: Whether the product is included or excluded.

The table contains one row with the following data:

Name	Seq.#	Type	Inclusion/Exclusion
Desktops	1	Product Category	Inclusion

Buttons for 'Update Order', 'Exclude', 'Include', and 'Delete' are also visible.

FIGURE 127. Product Entitlement Detail Page: Item Tab

10. Click the **Organization** tab.

11. Click **Assign...**
12. From the Hierarchical Entity Picker pop-up, select ITech Solutions, and click **Done**.
13. The Product Entitlement Detail page now appears as shown in the following figure.

The screenshot shows the 'sterling commerce' logo and 'Administration' header. The page title is 'Product Entitlement: Special Prices'. There are tabs for 'Info', 'Item', and 'Organization', with 'Organization' being the active tab. Below the tabs are buttons for 'Assign...', 'Unassign', and 'Update'. A table displays the entitlement details:

Shareable	Inherited	Profile Name	Root Profile Name	Profile Type	Profile Level
<input type="checkbox"/>	<input type="checkbox"/>	ITech Solutions		Retailer	Gold

FIGURE 128. Product Entitlement Detail Page: Organization Tab

14. Click **My Home** to return to the home page.

Creating Pricing Rules and Coupons

You next learn how to create pricing rules and coupons that storefront administrators use to manage special prices and discounts. You can create the following types of pricing rules and coupons:


- Item Quantity
- Combination
- Order Total
- Shipping Charge Order Total
- Item Shipping Surcharge (only valid for pricing rules)

For the purpose of this tutorial, you will create an item quantity rule and attach it to the segment, Urban Customers, that you created in "Creating Segments" on page 138.

1. Still logged in as bbunson, click **Pricing Rules** under the Pricing Administration panel.

The **Rules List** page displays.

2. Click **New Item Quantity Rule**.



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Pricing Rules

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

Item Pricing Rule:

Go to Rules List

Edit Header

Enter new rule information or change existing information. Press the Save button to save the current changes. Press the Cancel button to reverse current changes.

Note: Negative absolute or percentage amounts indicate discounts while positive absolute or percentage amounts indicate markup.

Save

Cancel

*Required Fields

General Rule Information

*Rule Name:

*Start Date (MM/DD/YYYY):

*Customer Type:

*End Date (MM/DD/YYYY):

*Currency:

Rule Description:

Enabled: ☒

Set Targets

Select whether the rule should use Product ID(s) or Feature Type(s) as the target.

☒ Use Product ID
 ☐ Use Feature

Select one or more Product IDs for the rule target.

Any product matching one of the Product IDs will receive the specified discount based on its quantity.

*Target Product ID:

Rule Trigger

Enter listed item Quantities that will cause the rule to fire and discount/markup the target item. Choose "Single Item" to apply the discount/markup on a single unit of the target item. Choose "All Items" to apply the discount/markup on each unit of the target item.

*Apply to:

#	Quantity	Type	Amount
(1)	<input type="text"/>	<input type="text" value="Absolute"/>	<input type="text"/>
(2)	<input type="text"/>	<input type="text" value="Absolute"/>	<input type="text"/>
(3)	<input type="text"/>	<input type="text" value="Absolute"/>	<input type="text"/>
(4)	<input type="text"/>	<input type="text" value="Absolute"/>	<input type="text"/>
(5)	<input type="text"/>	<input type="text" value="Absolute"/>	<input type="text"/>

#	Quantity	Type	Amount
(6)	<input type="text"/>	<input type="text" value="Absolute"/>	<input type="text"/>
(7)	<input type="text"/>	<input type="text" value="Absolute"/>	<input type="text"/>
(8)	<input type="text"/>	<input type="text" value="Absolute"/>	<input type="text"/>
(9)	<input type="text"/>	<input type="text" value="Absolute"/>	<input type="text"/>
(10)	<input type="text"/>	<input type="text" value="Absolute"/>	<input type="text"/>

FIGURE 129. Item Quantity Rule Detail Page

3. Enter information using the details in the following table:

TABLE 31. Item Quantity Rule Information

Field	Value
Rule Name	Pay for 9, take 10 home
Rule Description	Buy 10 notebooks, pay for 9 and take the last one for free
Start Date	The current date displays. Leave it as it is.
End Date	A date one year from the current date displays. Leave it as it is.
Customer Type	Leave All selected.
Currency	Leave All selected.
Enabled	Leave it checked.

- Under the **Set Targets** panel, leave the Use Product ID option selected.

5. Click ...

A Hierarchical Entity Picker pop-up displays.

6. Navigate to the **Notebooks** category and select **ANLP-7410**, then click **Done**.

7. Under the Rule Trigger panel, in the **Applies to** field, leave Single Item selected from the drop-down list.

8. In the first **Quantity** column, enter 10.

9. In the first **Type** column, select Percentage from the drop-down list.

10. In the first **Amount** column, enter 10.

11. Click **Save**.

The **Target Customers** tab displays.

12. Click the **Target Customers** tab.

The screenshot shows the Sterling Commerce Administration interface. The top navigation bar includes the Sterling Commerce logo, the word "Administration", and links for "My Home", "My Account", "About", "Help", and "Logout". Below this, a yellow banner displays the rule name "Item Quantity Rule: Pay for 9, take 10 home" and a "Go to Rules List" link. The main content area has two tabs: "Edit Header" and "Target Customers", with the latter being selected. Below the tabs, there is instructional text: "To apply to all users in the system, choose Applies to All Users and click the Save button." and "To apply to selected customer segments, choose Applies to Selected Customer Segments. You will then be able to select segments to attach." A form titled "* Applies To" contains two radio button options: "All Users" and "Selected Customer Segments". The "Selected Customer Segments" option is selected. A yellow "Save" button is located at the bottom right of the form.

FIGURE 130. Target Customers Tab

13. In the **Applies To** field, select the Selected Customer Segments option, and click **Browse...**

14. From the Hierarchical Entity Picker pop-up, select the Urban Customers segment that you created in "Creating Segments" on page 138, and click **Done**.

The **Target Customers** tab now appears as shown in the following figure.

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An AllNet Company

Administration

My Home | My Account | About | Help | Logout

Go to Rules List

Item Quantity Rule: Pay for 9, take 10 home

Edit HeaderTarget Customers

To apply to all users in the system, choose Applies to All Users and click the Save button.

To attach segments, use the Browse button to select segments from the picker, and then click the picker's Done button when selection is complete.

To detach a segment, click the Detach icon for that segment.

* Applies To

☐ All Users

☒ Selected Customer Segments

Save

Select Customers Segments to attach:

Browse...

Segment Name	Description	Status	Start Date	End Date	
Urban customers	Urban customers who can afford to own 2 desktops	Active	3/14/2008	3/14/2013	

FIGURE 131. Target Customers Tab with Segment

15. Click **My Home** to return to the home page.

Creating Promotions

In this section, you learn how to create promotions and direct them to promotion widgets on the home page. While creating promotions, you can decide where you want the promotion to be seen on the page and what happens when a user clicks on it.


In this section, you create a promotion that appears on the top of the middle section on the Anonymous user's home page.

1. Click **Promotions** under the Pricing Administration panel on the AllNet home page.

The **Promotion List** page displays as shown in the following figure.

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Sterling Multi-Channel Selling Solution Tutorial Guide



sterling commerce

An AT&T Company

Promotions

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

Promotion List:

Search for Promotions

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


Promotion List page.

Copy Delete New

<input type="checkbox"/>	ID ▾	Name	Locale	View Count	Add To List Count	Priority	Product ID	Start Date	End Date
No Rows Found									

FIGURE 132. Promotions List

2. Click **New**.



As ATEX Company

Promotions

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

Promotion Detail

[Go to Promotion List](#)

Edit Header

Enter data and press the Create button to create a promotion.

Cancel

Create

General Info on page.

Name *

Description

Upload Image

Browse...

Image Name

URL

Promotion Controls

Start Date *

Priority *

1

Enabled

☐

End Date *

Locale *

United States

Product ID (Entering * will match all Products)

Add

Remove

Optional Add to Link Properties

Add to Cart Product ID

Add to Cart Quantity

FIGURE 133. Promotion Detail Header Tab

-
3. Enter information as shown in the following table:

TABLE 32. New Promotion Entries

Field	Value
Name	Notebook promotion
Description	Buy a notebook, win a chance to take a second notebook home
Upload Image	Enter the filename of the image you want to use for the promotion or click Browse... to locate the image and upload it. For example: C:\storefront-tutorial\images\StorefrontPromotion.gif
URL	Enter the URL where you want the promotion to appear. For example: http://localhost/Sterling/en/US/adirect/allnet?cmd=OnlineOrderingPageDataDisplay&ent
Start Date	Enter the current date
End Date	Enter a date one year from the current date
Priority	Leave it as 1
Locale	Leave it as United States
Product ID	HomeMainPromo

4. Click **Add** to add the product ID.
5. Select the **Enabled** checkbox.
6. Click **Create**.

The **Promotion Detail Page** displays with a new **Target Customers** tab.

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My Home | My Account | About | Help | Logout

Promotion Detail Notebook promotion [Go to Promotion List](#)

Edit Header **Target Customers**

Change promotion information and press the Save button to save the current changes. Press the Cancel button to reverse the current changes.
Use the Target Customers tab to specify the customer segments to which the promotion should be applied.

[Cancel](#) [Preview](#) [Save](#)

General Info on page.

Name * Notebook promotion	Description Buy a notebook, win a chance to take a second notebook home
Upload Image <input type="text"/> Browse	Image Name StorefrontPromotion.gif
URL http://1127.0.0.1:8082/Comergent/en/US/adirect/allnet?cmd	

Promotion Controls

Start Date * 2/11/2008 Calendar	Priority * 1 Dropdown	Enabled <input checked="" type="checkbox"/>
End Date * 2/11/2009 Calendar		Locale * United States Dropdown
Product ID (Entering * will match all Products) <input type="text"/> Add New		
<input type="text" value="HomeMainPromo"/> Remove		

Optional Add To List Properties

Add To Cart Product ID <input type="text"/>	Add To Cart Quantity <input type="text"/>
---	---

FIGURE 134. Promotion Detail Page with New Tab

7. Click the **Target Customers** tab.

The promotion does not become active until it applies to users or until you associate one or more customer segments with it.

sterling commerce | Administration
An AT&T Company

My Home | My Account | About | Help | Logout

Promotion Detail Notebook promotion [Go to Promotion List](#)

Edit Header **Target Customers**

To apply to all users in the system, choose Applies to All Users and click the Save button.

To apply to selected customer segments, choose Applies to Selected Customer Segments. You will then be able to select segments to attach.

***Applies To**

☒ All Users

☐ Selected Customer Segments

[Save](#)

FIGURE 135. Target Customers Tab

8. Select the **Selected Customer Segments** radio button to apply this promotion to members of a particular segment.
9. Click **Browse...**
10. From the Hierarchical Entity Picker pop-up, select the **Urban Customers** segment that you created in "Creating Segments" on page 138, and click **Done**.
11. Click **Save**.
12. Click **Go to Promotion List**.
13. Click **Logout**.

The Promotion List page displays.

Notice that you can now see the promotion on the AllNet home page.
Notice also that if you click the promotion, the promotion URL that you specified while creating the promotion pops up in a separate window.

Creating Mailing Lists

You can create mailing lists that you can use to target a specific group of users for marketing campaigns.

1. Log in as the bbunson user, and click **Mailing Lists** under the **Channel Management** panel on the AllNet home page.

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

The screenshot shows the 'sterling commerce' logo and 'Administration' header. Below the header is a navigation bar with links: 'My Home | My Account | About | Help | Logout'. The main section is titled 'Mailing Lists'. It contains a search box with the text 'Find mailing lists that contain:' and a dropdown menu for 'Mailing List Name'. Below the search box is a 'New Mailing List' button and a dropdown menu for 'From Customer Segments'. Below these is a table with the following columns: 'Mailing List Name', 'Description', 'Mailing List Type', 'Created By', and 'Created Date'. The table is currently empty, and the text 'No Rows Found' is displayed at the bottom.

FIGURE 136. Mailing Lists Page

2. Select From Customer Segments from the drop-down list and click **New Mailing List**.

The New Mailing List page displays.

The screenshot shows the 'New Mailing List' page in the Sterling Commerce Administration interface. The page has a header with the Sterling Commerce logo and 'Administration' text. On the right, there are links for 'My Home', 'My Account', 'About', 'Help', and 'Logout'. Below the header, the page title is 'New Mailing List' with a 'Go To Mailing Lists' link. A sub-header 'Edit Header' is present. The main content area contains instructions: 'Enter the mailing list header data and click Create.' and 'All fields with asterisk(*) are required.' There are 'Create' and 'Cancel' buttons. Below this is a 'Mailing List Upload Details' section with a form containing a text field for '*Mailing List Name' and a text area for 'Description'.

FIGURE 137. New Mailing List

3. Enter **Notebook Users** in the Mailing List Name and Description fields.
4. Click **Create**.

A new **Target Customers** tab appears as shown in the following figure.

The screenshot shows the 'Mailing List: Notebook Users' page in the Sterling Commerce Administration interface. The page has the same header as Figure 137. Below the header, the page title is 'Mailing List: Notebook Users' with a 'Go To Mailing Lists' link. A sub-header 'Edit Header' is present, and a 'Target Customers' tab is visible. The main content area contains instructions: 'Change the header data and click Save, or use the Target Customers tab to create the mailing list from customer segments.' and 'All fields with asterisk(*) are required.' There are 'Save' and 'Cancel' buttons. Below this is a 'Mailing List Upload Details' section with a form containing a text field for '*Mailing List Name' (filled with 'Notebook Users') and a text area for 'Description' (filled with 'Notebook Users').

FIGURE 138. Mailing List Page with New Tab

5. Click the **Target Customers** tab.

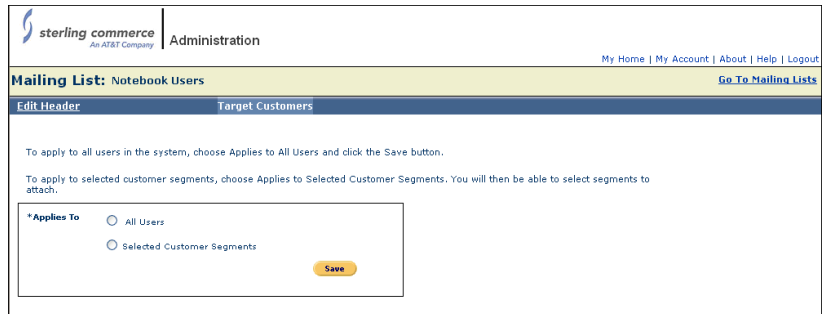


FIGURE 139. Target Customers Tab

6. Select the **All Users** radio button.
7. Click **Save**.
8. Click **Go to Mailing Lists**.

The Mailing Lists page displays.

9. Click **My Home** to return to the home page.

Creating Campaigns

You can create email marketing campaigns to target specific users.

In this section, you create an email campaign called Press Notification to target users belonging to the Notebook Users mailing list.

1. Click **Campaigns** under the Channel Management panel on the AllNet home page.

The **Campaigns List** page displays as shown in the following figure.

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Campaigns

My Home | My Account | About | Help | Logout

Campaigns List

Find campaigns that contain:

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

All campaigns shown

[New Campaign](#)

Campaign Name	Created By	Scheduled Execution Date	Actual Execution Date	Recipient Count	Sent Count	View Count	Click Count	Status
No Rows Found								

FIGURE 140. Campaigns List Page

- Click **New Campaign**.

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Campaigns

My Home | My Account | About | Help | Logout

[Go to Campaign List](#)

Campaign:

[Edit Header](#)

Enter data and click on Create button to create campaign
All fields with asterisk(*) are required.

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

Campaign Header

*Name

Description

Execution Date (M/D/YYYY)

Execution Hour 00:00

Enable ☐

FIGURE 141. Campaign Detail Header Tab

- Enter the following information:
 - Name:** Press Notification
 - Description:** Press Notification
 - Execution Date:** Enter the current date
- Select the **Enable** checkbox.
- Click **Create**.

sterling commerce

An iBET Company

Campaigns

My Home | My Account | About | Help | Logout

Go to Campaign List

Campaign: Press Notification

Edit Header

Manage Content

Manage Recipients

After changing campaign information save changes using the Save button.

All fields with asterisk(*) are required.

SaveCancel

Campaign Header

Name

Press Notification

Description

Press Notification

Execution Date

1/31/08

(M/D/YYYY)

Execution Hour

00:00

Enable

☒

FIGURE 142. Campaign Detail With New Tabs

6. Click the **Manage Content** tab.

The **Manage Content** tab of the **Campaign Detail** page displays.

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An AT&T Company

Campaigns

My Home | My Account | About | Help | Logout

Campaign: Press Notification [Go to Campaign List](#)

Edit Header Manage Content Manage Recipients

After changing campaign information save changes using the Save button.
All fields with asterisk(*) are required.

Test Save Cancel

Campaign Content

To:

From:

Subject:

Body

```
<html>
<head>
<meta http-equiv="Content-Type" content="text/html; charset=UTF-8"/>
<title>Press Notification</title>
</head>
<body>
<table cellpadding=0 cellspacing=0 border=0 width=100%>
<tr><td>Press Notification</td></tr>
<tr><td><br><br><br></td></tr>
<tr><td>Dear @RECIPIENT_NAME@,</td></tr>
<tr><td><br></td></tr>
<tr><td>For more information on Item1, go to @LINK1@</td></tr>
<tr><td>For more information on Item2, go to @LINK2@</td></tr>
<tr><td>For more information on Item3, go to @LINK3@</td></tr>
<tr><td>For more information on Item4, go to @LINK4@</td></tr>
</tr>
</table>
</body>
</html>
```

Link 1
 Text:
[Preview](#)

Link 2
 Text:
[Preview](#)

Link 3
 Text:
[Preview](#)


Link 4
 Text:
[Preview](#)

FIGURE 143. Manage Content Tab

You can use the Manage Content tab to specify the email messages you want to send to the recipients of the campaign. You enter the message in HTML format. For more information, see the *Sterling Multi-Channel Selling Solution Administration Guide*.

7. Click the **Manage Recipients** tab.

The **Manage Recipients** tab of the Campaign Detail page displays as shown in the following figure.

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Campaigns

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

Campaign: Press Notification

[Go to Campaign List](#)

Edit Header

Manage Content

Manage Recipients

Select appropriate mailing list to use for this campaign. After updating the assignments, save changes using the Save button. Define new selection criteria and assign it to this campaign by clicking the Add New Criteria button. Upload an external mailing list and assign it to this campaign by clicking the Upload button.

Save

Cancel


Include	Exclude	Ignore	Mailing List Name 	Description	Mailing List Type	Created By	Created Date
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Notebook Users	Notebook Users	Segments	bbunson	1/31/2008

FIGURE 144. Manage Recipients Tab

You can use the **Manage Recipients** tab to specify the recipients of your email message. You can also specify the mailing list that you want to use to specify the recipients.

- 8. Select the **Include** radio button next to the Notebook Users mailing list name.
- 9. Click **My Home** to return to the home page.

Creating Product Models

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 163
- "Rules" on page 169
 - "Creating a Rule" on page 171
 - "Using Rules to Control Display of Option Items" on page 173
- "UI Controls" on page 179

- "Display Properties" on page 179
- "Tabular Displays" on page 180
- "Calculated Property Values" on page 181
- "User-Entered Values" on page 184
- "Images" on page 187

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 33. 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.

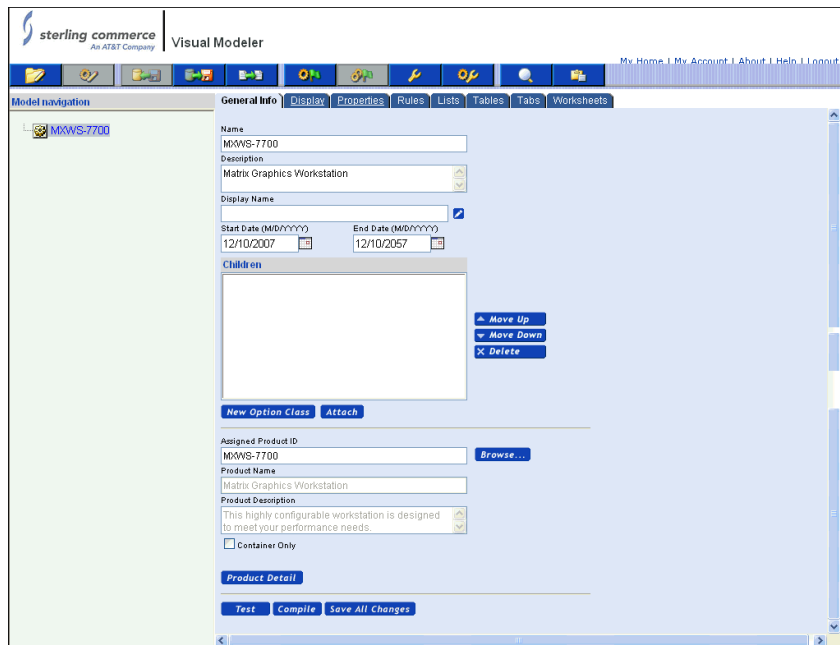


FIGURE 145. Visual Modeler Model Detail Page: General Info Tab

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**.

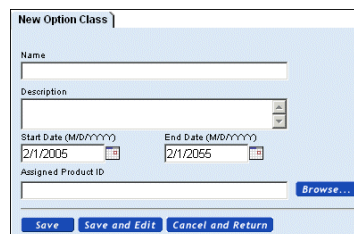


FIGURE 146. Visual Modeler Model Detail Page: New Option Class Tab

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.

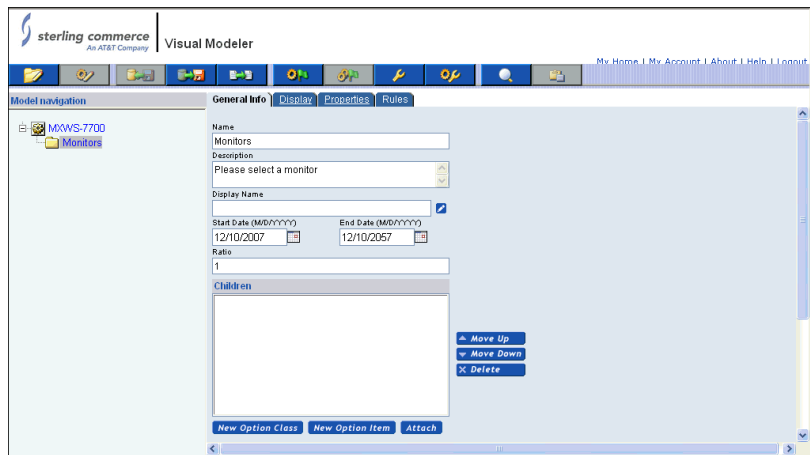


FIGURE 147. Visual Modeler Option Class Page: General Info Tab

19. Click **New Option Item**.

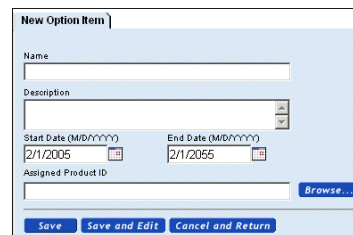


FIGURE 148. Visual Modeler Model Detail Page: New Option Item Tab

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.

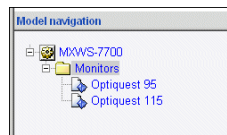


FIGURE 149. Model Navigation Tree

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.

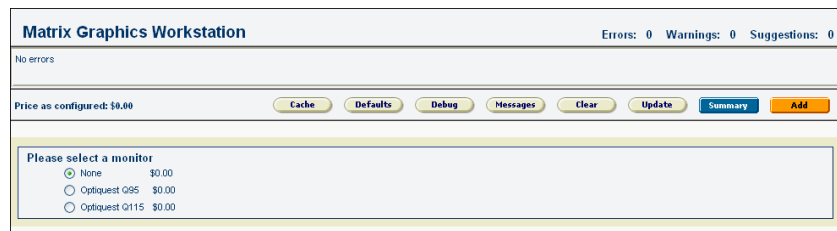


FIGURE 150. Visual Modeler Test Model Page

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 163
- “UI Controls” on page 179

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.

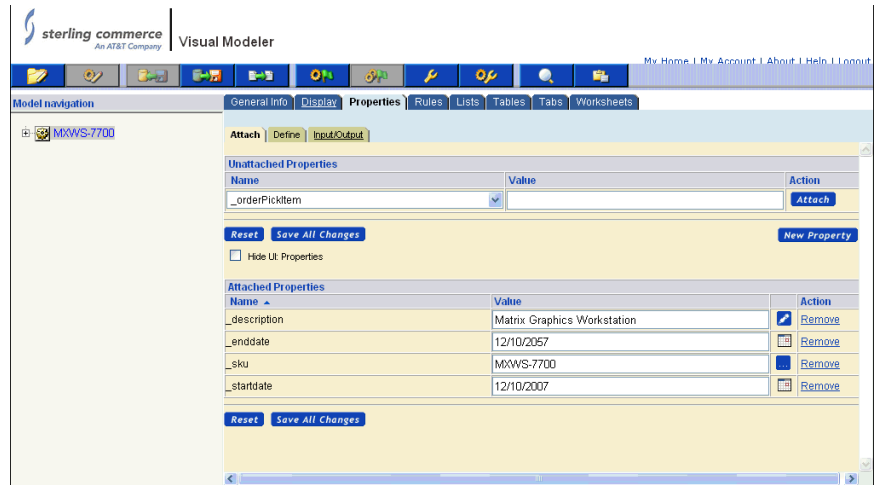


FIGURE 151. Visual Modeler Properties Page

4. Click the **Define** tab.

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

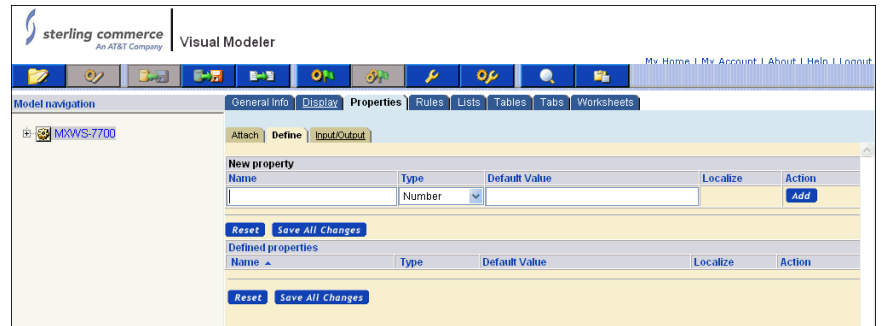


FIGURE 152. Visual Modeler Define Properties Page

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 34. 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.

The screenshot shows the 'Visual Modeler' interface for the 'MXWS-7700' model. The 'Define' tab is active, showing a 'New property' section with a table for adding properties. Below this is a 'Defined properties' section with a table listing existing properties. The 'Defined properties' table includes columns for Name, Type, Default Value, Localize, and Action. The properties listed are MaximumResolution (String), MaximumWeight (Number), MonitorSize (Number), MonitorWeight (Number), and RequiresXVGA (Number).

Name	Type	Default Value	Localize	Action
MaximumResolution	String		<input type="checkbox"/>	Delete
MaximumWeight	Number			Delete
MonitorSize	Number			Delete
MonitorWeight	Number			Delete
RequiresXVGA	Number			Delete

FIGURE 153. 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.

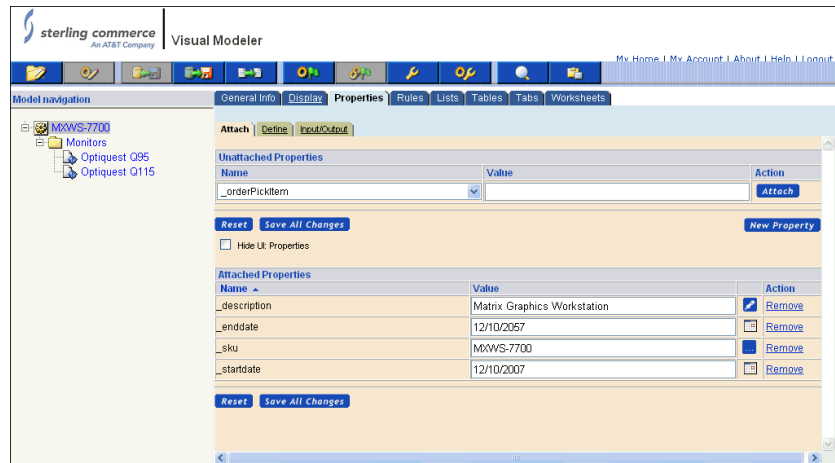


FIGURE 154. Visual Modeler MXWS-7700 Model Properties Page

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:

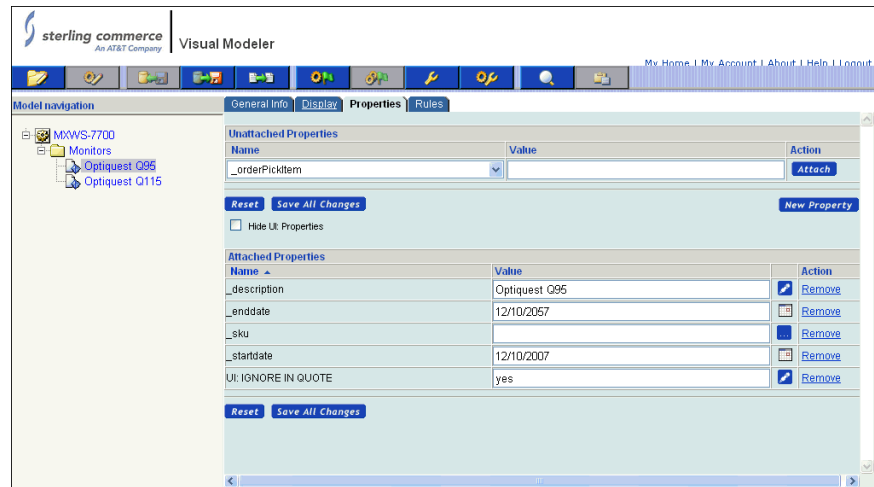


FIGURE 155. Visual Modeler Optiquest Q95 Properties Page

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 35. 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 36. 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.

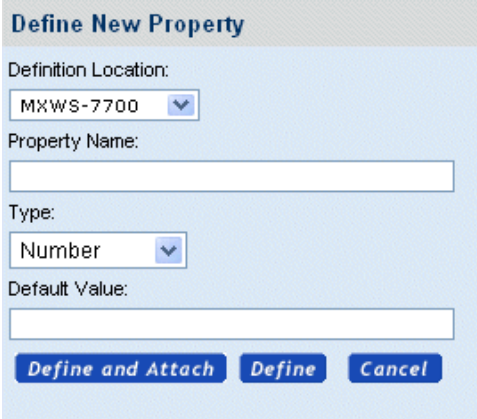
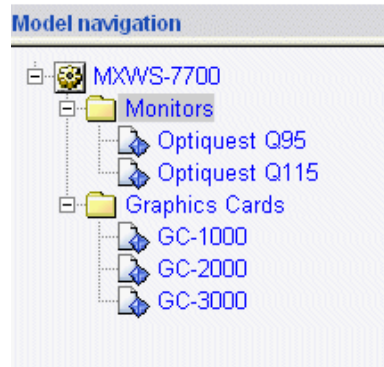
The image shows a 'Define New Property' dialog box. It has a title bar with the text 'Define New Property'. Below the title bar, there are four labeled fields: 'Definition Location:' with a dropdown menu showing 'MXWS-7700', 'Property Name:' with an empty text input field, 'Type:' with a dropdown menu showing 'Number', and 'Default Value:' with an empty text input field. At the bottom of the dialog, there are three buttons: 'Define and Attach', 'Define', and 'Cancel'.

FIGURE 156. 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 169. Define the option items as described in "Create the Model" on page 158 and attach the Resolution property as described in "Attaching Properties" on page 167. 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 37. IsPicked Property Definition

Option Class	Property Definition	Option Item	Property Value
Monitors	IsPicked	Optiquet Q95	1
		Optiquet 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 157. 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 177 we demonstrate an alternate approach using constraint tables. In this section, we use a rule with an assignment action to ensure that a customer will only pick valid combinations of graphics cards and monitors.

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

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

-
- a. Name: Display Compatible Graphics Cards
 - b. Description: This rule ensures that only graphics cards that support each monitor are displayed.
 6. 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 177, 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 38. 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 158. Model Detail Page: Tables Tab and Records Sub-Tab

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

FIGURE 159. Model Detail Page: Tables Tab and Records Sub-Tab

11. Select the **invalid with each other** radio button, and check the Optiquest 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 Optiquest 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 179
- "Tabular Displays" on page 180
- "User-Entered Values" on page 184
- "Images" on page 187

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**.

The screenshot shows a software interface titled "Matrix Graphics Workstation". At the top right, it displays "Errors: 0 Warnings: 0 Suggestions: 0". Below the title bar, there's a status bar that says "No errors". A toolbar contains buttons for "Cache", "Defaults", "Debug", "Messages", "Clear", "Update", "Summary", and "Add". The main content area is titled "Please select a monitor." and contains a table with the following data:

Name	Size	Resolution
Optquest G95	19.0	1024x768
Optquest Q115	21.0	1280x1024

Below the table, there's a section titled "Graphics Cards" with four radio button options, each with a price of \$0.00:

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

FIGURE 160. 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.

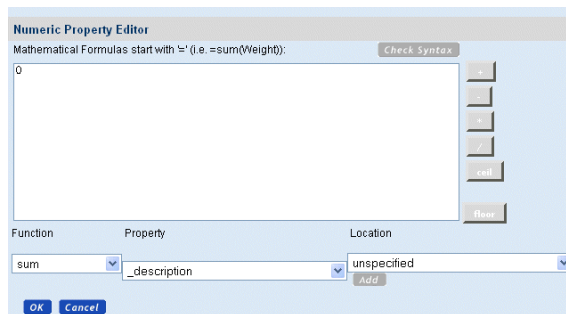


FIGURE 161. Numeric Property Editor Window

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.

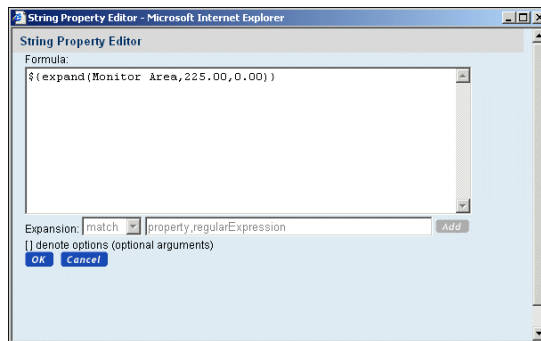
You can also use Java classes in the Numeric and String Editor windows. For example, suppose that the monitors are circular, and the Monitor Size (d) property is the radius of the monitor. Then the area (A) should be calculated as  $\pi * d * d$ .

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 162. String Property Editor Window**

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

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

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 163. 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:  

$$\text{value}(\text{MonitorWeight}) > \text{value}(\text{MaximumWeight})$$
  - 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 39.**

| 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 40. 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 41. RAM Option Class**

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



**TABLE 42. 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

Cache

Defaults

Debug

Messages

Clear

Update

Summary

Add

Please select a monitor.

| Name          | Size | Area  | Resolution |
|---------------|------|-------|------------|
| Optquest G95  | 19.0 | 180.5 | 1024x768   |
| Optquest G115 | 21.0 | 220.5 | 1280x1024  |

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

**FIGURE 164. 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.

The screenshot shows the 'Matrix Graphics Workstation' application. At the top, it displays 'Errors: 0 Warnings: 0 Suggestions: 0'. Below this is a status bar with 'No errors'. A toolbar contains buttons for 'Cache', 'Defaults', 'Debug', 'Messages', 'Clear', 'Update', 'Summary', and 'Add'. The main area is titled 'Please select a monitor.' and contains a table with columns for Name, Size, Area, and Resolution. Below the table are four sections: 'Graphics Cards', 'Processors', 'RAM', and 'Keyboards', each with a list of options and their prices. The 'Graphics Cards' section has four options: None (\$0.00), GC-1000 (\$0.00), GC-2000 (\$0.00), and GC-3000 (\$0.00). The 'Processors' section has four options: None (\$0.00), Pentium 4 2.8 GHz (\$0.00), Pentium 4 2.8A GHz (\$0.00), and Pentium 4 2.8C GHz (\$0.00). The 'RAM' section has four options: None (\$0.00), SDRAM 256MB (\$0.00), DDR 256MB (\$0.00), and RDRAM 256MB (\$0.00). The 'Keyboards' section has four options: None (\$0.00), Logitech 967300 (\$0.00), Gyratron GP170 (\$0.00), and Adesso 595 (\$0.00).

| Name          | Size | Area  | Resolution |
|---------------|------|-------|------------|
| Optquest G95  | 19.0 | 180.5 | 1024x768   |
| Optquest G115 | 21.0 | 220.5 | 1280x1024  |

**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
- ☐ Gyratron GP170 \$0.00
- ☐ Adesso 595 \$0.00

**FIGURE 165. 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)    [Set Defaults](#)    [Show Trace Log](#)    [Show Messages](#)    [Clear](#)    [Update](#)    [Summary](#)    [Add to List](#)

Monitors

☒ None    \$0.00

☐ Optquest Q95    \$0.00

☐ Optquest Q115    \$0.00

[Update](#)

Graphics Cards

☒ None    \$0.00

☐ GC-1000    \$0.00

☐ GC-2000    \$0.00

☐ GC-3000    \$0.00

Processors

☒ None    \$0.00

☐ Pentium 4 2.8 GHz    \$0.00

☐ Pentium 4 2.8A GHz    \$0.00

☐ Pentium 4 2.8C GHz    \$0.00

RAM

☒ None    \$0.00

☐ SDRAM 256MB    \$0.00

☐ DDR 256MB    \$0.00

☐ RDRAM 256MB    \$0.00

Keyboards

☒ None    \$0.00

☐ Logitech 967300    \$0.00

☐ Gyration GP170    \$0.00

☐ Adesso 595    \$0.00

Case

Please enter a color:

FIGURE 166. Revised Three-Column Layout with Skipped Column

192

Sterling Multi-Channel Selling Solution Tutorial Guide

## *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.

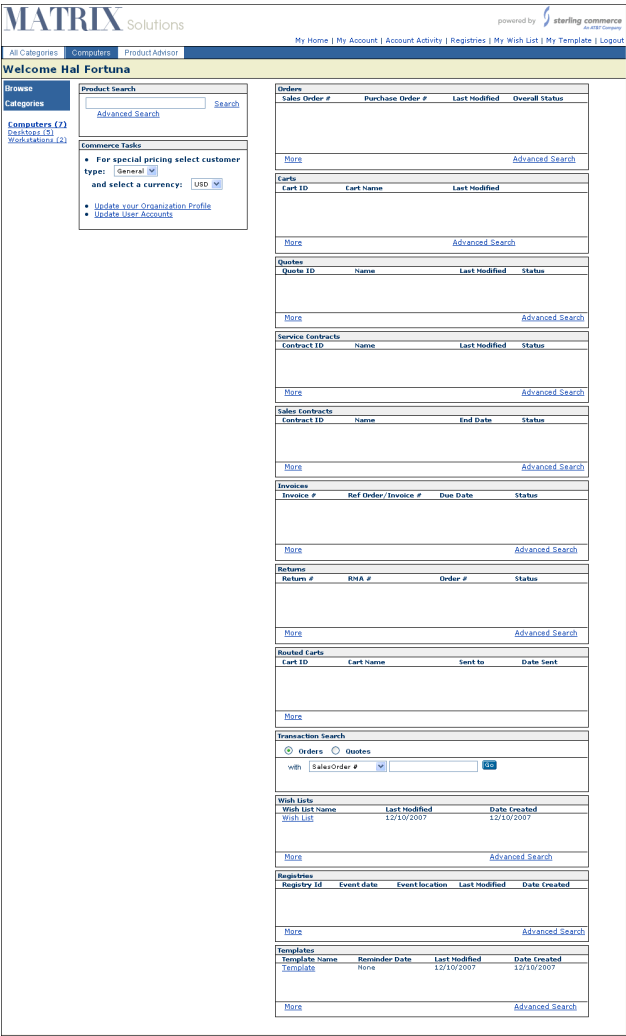


FIGURE 167. Partner User Home Page

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

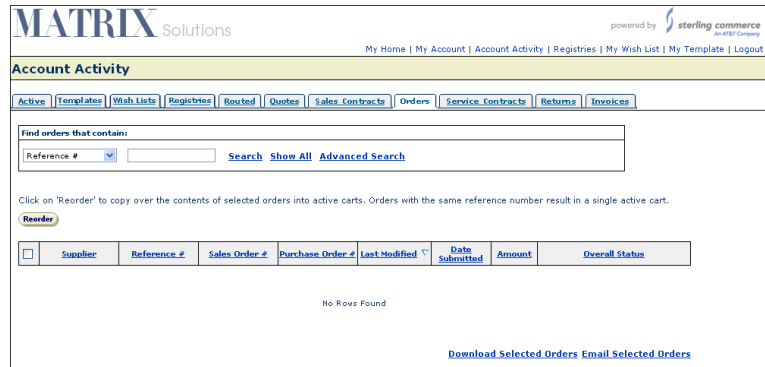


FIGURE 168. Workspace Page

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

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

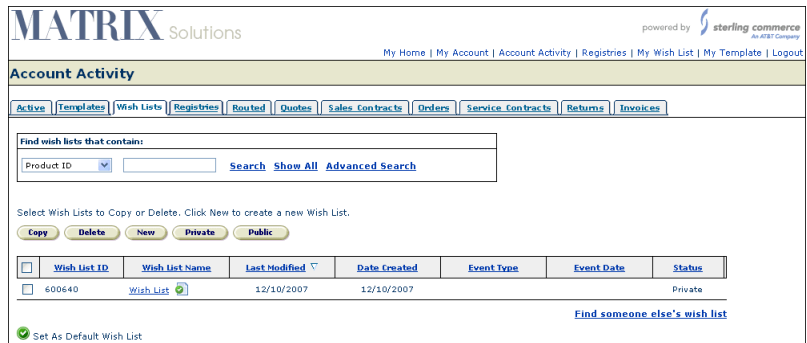


FIGURE 169. Wish List Page

4. Click the **New** button.

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

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

Account Activity

[Active](#) | [Templates](#) | [Wish Lists](#) | [Registries](#) | [Routed](#) | [Quotes](#) | [Sales Contracts](#) | [Orders](#) | [Service Contracts](#) | [Returns](#) | [Invoices](#)

Find wish lists that contain:

Product ID

Search Show All Advanced Search

Select Wish Lists to Copy or Delete. Click New to create a new Wish List.

Copy

Delete

New

Private

Public

New Wish \*:

List Name WishList

Create

|                          | Wish List ID | Wish List Name | Last Modified | Date Created | Event Type | Event Date | Status  |
|--------------------------|--------------|----------------|---------------|--------------|------------|------------|---------|
| <input type="checkbox"/> | 600640       | Wish List      | 12/10/2007    | 12/10/2007   |            |            | Private |

[Find someone else's wish list](#)

☒ Set As Default Wish List

FIGURE 170. Wish List Page with Create Wish List panel

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

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[All Categories](#) | [Computers](#) | [Product Advisor](#)

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

My Wish List: Hal's Wish List

[Return to List](#)

Catalog Search

Add All Items to Cart

Update

Advanced Search

Get

Sort On :

Date Added

| Product Name  | Availability | Price | Quantity Desired | Quantity Received | Still Needs |
|---------------|--------------|-------|------------------|-------------------|-------------|
| No Rows Found |              |       |                  |                   |             |

Actions

[Make Wish List Public](#)  
[This wish list is private](#)  
[Make Wish List Default](#)  
[Email](#)  
[Print View](#)  
[Notes](#)  
[View Purchases](#)  
[Find someone else's wish list](#)

Details

Name: Hal's Wish List

Change

Show more information

My Wish List

[Hal's Wish List](#)  
[Wish List](#)  
[More](#) | [Templates](#)

Quick Add

FIGURE 171. 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.



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.

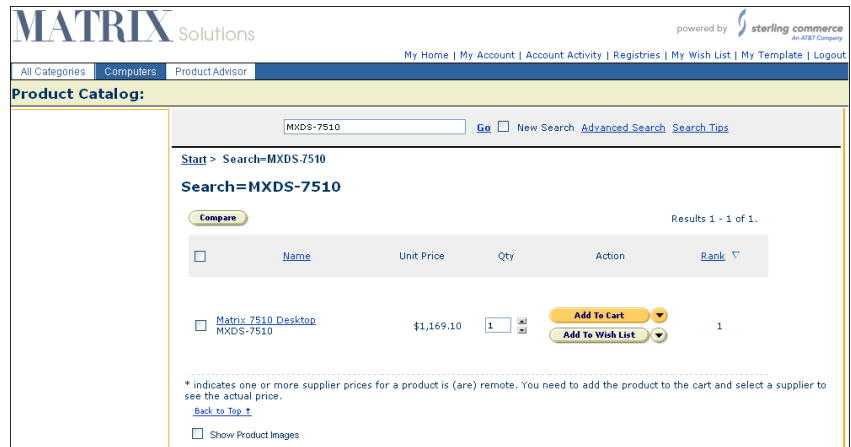


FIGURE 172. Product Catalog Page

7. Click the down arrow next to the **Add to Wishlist** button.

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

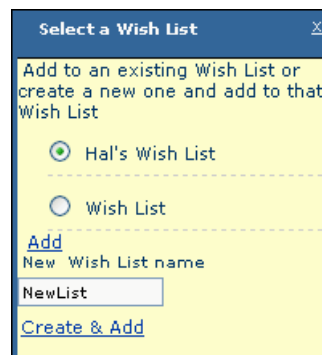


FIGURE 173. Select Wish List Pop-Up

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

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

9. 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.

The screenshot displays the 'My Wish List: Hal's Wish List' page in the Matrix Solutions interface. The page is powered by Sterling Commerce. The top navigation bar includes links for 'All Categories', 'Computers', 'Product Advisor', 'My Home', 'My Account', 'Account Activity', 'Registries', 'My Wish List', 'My Template', and 'Logout'. The main content area features a table with the following data:

| Product Name                     | Availability          | Price      | Quantity Desired | Quantity Received | Still Needs |
|----------------------------------|-----------------------|------------|------------------|-------------------|-------------|
| Matrix 7510 Desktop<br>MXDS-7510 | Matrix Solutions Inc. | \$1,169.10 | 1                | 0                 | 1           |

Below the table, there are fields for 'Comments' and 'Priority' (set to Low). The left sidebar contains a 'Catalog Search' section with a search bar and an 'Advanced Search' link. Below this is an 'Actions' panel with links: 'Make Wish List Public' (with a note 'This wish list is private'), 'Make Wish List Default', 'Email', 'Print View', 'Notes', 'View Purchases', and 'Find someone else's wish list'. The 'Details' panel shows the 'Name: Hal's Wish List' with a 'Change' button and a 'Show more information' link. The 'My Wish List' panel includes a link to 'Hal's Wish List' and a 'More' link. The 'Quick Add' panel is at the bottom.

FIGURE 174. 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 175. 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.

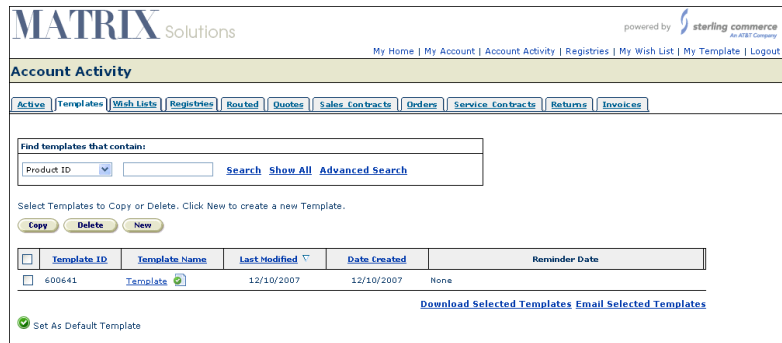


FIGURE 176. Templates Page

4. Click the **New** button.

The Template page re-displays with a new panel.

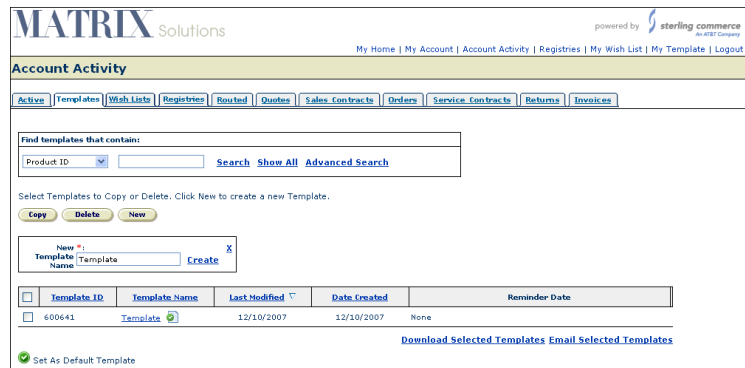
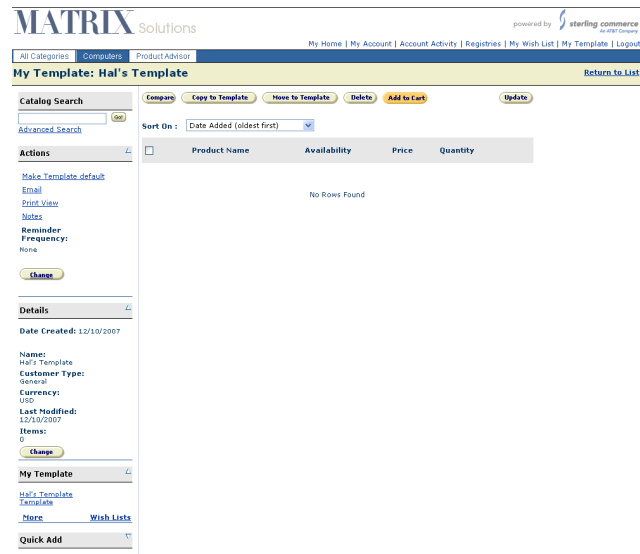


FIGURE 177. Template Page with Create Template Panel

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 178. 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.

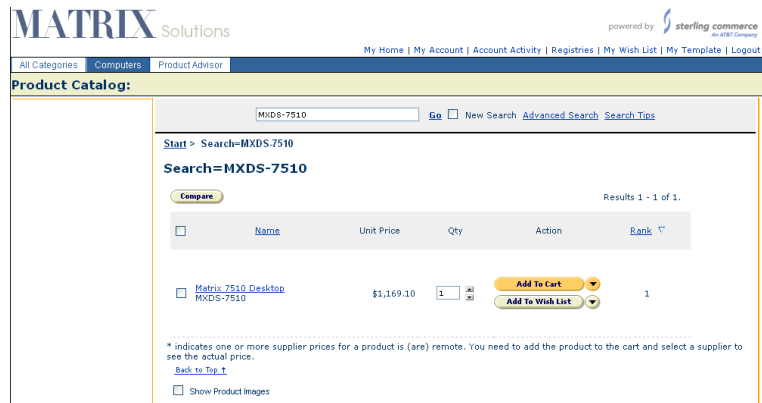


FIGURE 179. Product Catalog Page

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

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

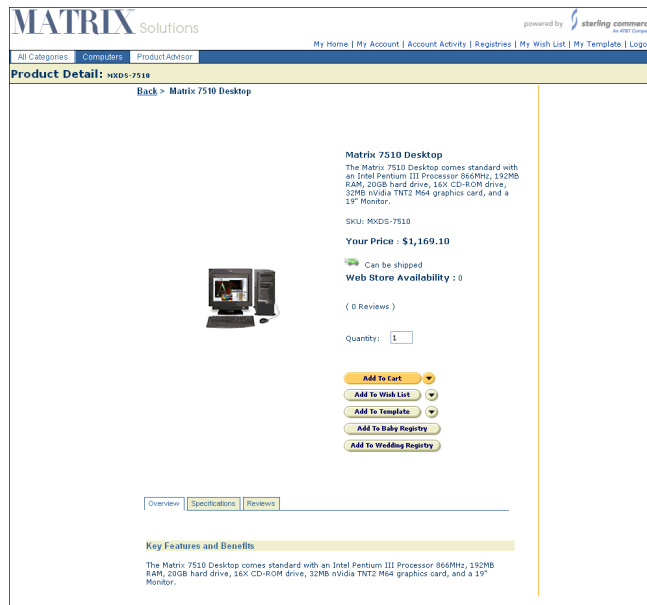


FIGURE 180. Product Detail Page

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



**FIGURE 181. Select Template Pop-Up**

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

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

10. 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.

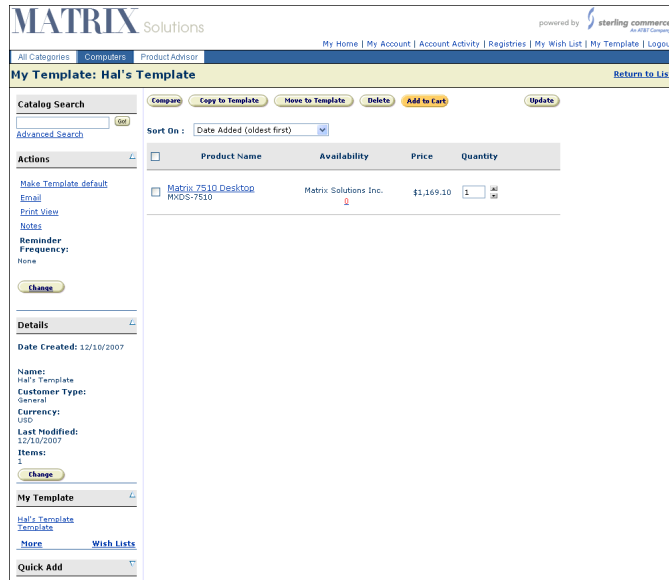


FIGURE 182. Template Detail with Product

## 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.



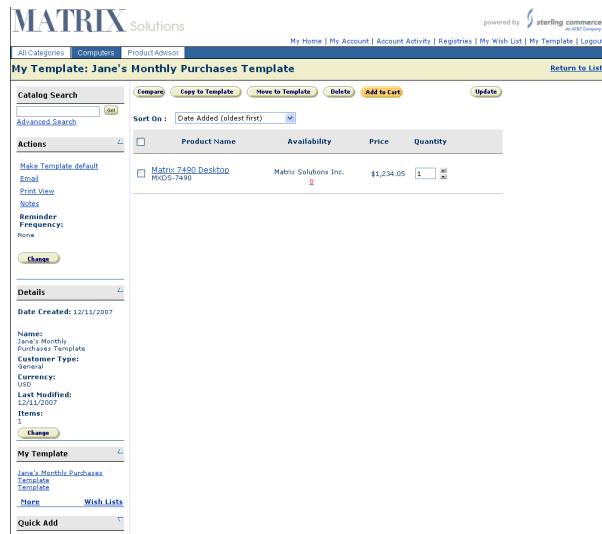


FIGURE 183. Jane's Monthly Purchases Template Detail Page

---

## 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.

**MATRIX Solutions** powered by **sterling commerce** an ACSI Company

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

**Account Activity**

Active | Templates | Wish Lists | Registries | Routed | Quotes | Sales Contracts | Orders | Service Contracts | Returns | Invoices

Find registries that contain:

Registry Type: Baby Registry Search Show All Advanced Search

Click Create to create a new Registry. Click Private, Public to set sharing for Registries.

Create Baby Registry Create Wedding Registry Private Public

| Registry ID   | Registry Type | Registrant Name | Co-Registrant Name | Last Modified | Date Created | Event Date | Status |
|---------------|---------------|-----------------|--------------------|---------------|--------------|------------|--------|
| No Rows Found |               |                 |                    |               |              |            |        |

Set As Active Registry Find someone else's Registry

**FIGURE 184. Registries Page**

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

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

**MATRIX Solutions** powered by **sterling commerce** an ACSI Company

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

**Wedding Registry**

Event details Ship Confirm Next

Create a Wedding Registry:

Registry Name: Wedding registry

Wedding Date: [Date Picker]

Wedding Location: [Text Field]

Shower Date: [Date Picker]

Shower Location: [Text Field]

Approximate number of guests: [Text Field]

Reward Card No.: [Text Field]

Comments: [Text Field]

Registrant's Info:

Registrant's First Name: Hal

Registrant's Last Name: Fortuna

Registrant's Email: hfortuna@bellissima.

Registrant's Address Line 1: 1026 Pyrenean Way

Registrant's Address Line 2: [Text Field]

Registrant's city: Navana

State and Zip: CA 90013

Country: USA

Save to User Profile

Registrant's Phone No.: Business [Text Field]

Co-Registrant's Info:

Co-Registrant's First Name: [Text Field]

Co-Registrant's Last Name: [Text Field]

Co-Registrant's Email: [Text Field]

Co-Registrant's Address Line 1: [Text Field]

Co-Registrant's Address Line 2: [Text Field]

Co-Registrant's city: [Text Field]

State and Zip: [Text Field]

Country: USA

Add Remove

**FIGURE 185. 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.

**MATRIX Solutions** powered by **sterling commerce**  
[My Home](#) | [My Account](#) | [Account Activity](#) | [Registries](#) | [My Wish List](#) | [My Template](#) | [Logout](#)

### Shipping Information

Event details **Ship** Confirm **Next**

**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.

1028 Pyrenean Way  
Navarra, CA 90013  
USA

1026 Pyrenean Way  
Navarra, CA 90013  
USA

1028 Pyrenean Way  
Navarra, CA 90013  
USA

1026 Pyrenean Way  
Navarra, CA 90013  
USA

**Current Address**

Title:

Last name:

First name:

Address Line 1: \*

Address Line 2:

City: \*

State and Zip:

Country: \*

☐ Save To User Profile

**Future Address**

No future address: ☒

Start Date:

Title:

Last name:

First name:

Address Line 1: \*

Address Line 2:

City: \*

State and Zip:

Country: \*

☐ Save To User Profile

FIGURE 186. Shipping Information Page

8. Click **Next**.

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

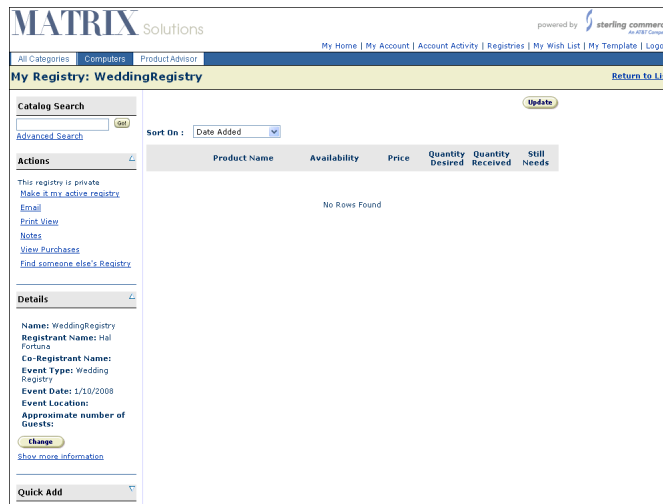


**FIGURE 187. Registry Confirmation Page**

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.

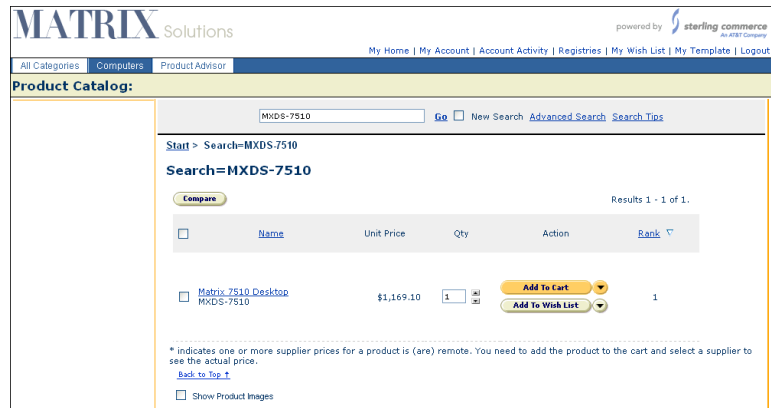


**FIGURE 188. Registry Detail Page**

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 189. Catalog Search Results Page**

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

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



FIGURE 190. Product Detail Page

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

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

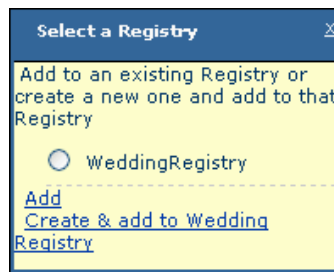


FIGURE 191. Select Wedding Registry Pop-Up

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.

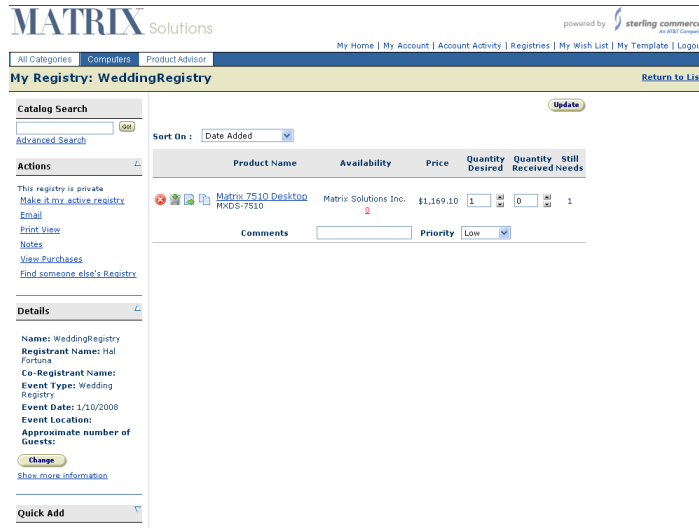


FIGURE 192. Wedding Registry Detail with Product

## 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.

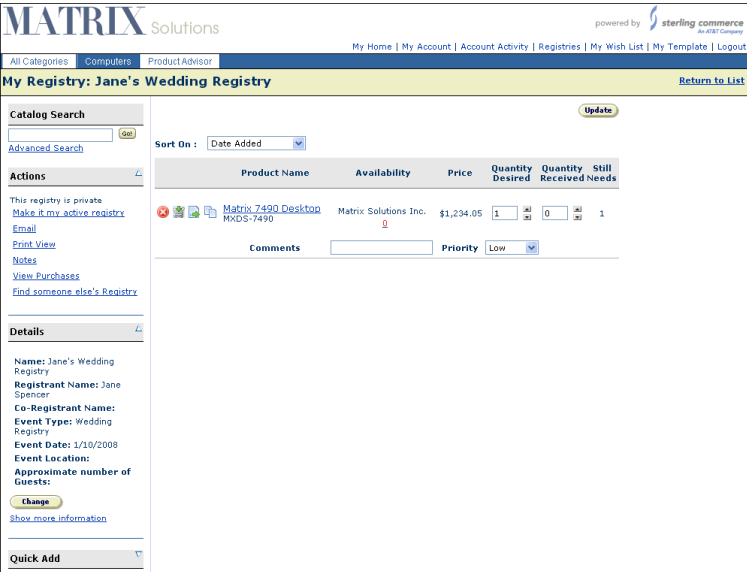


FIGURE 193. Jane’s Wedding Registry Detail Page



## *The End User Experience*

---

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

- End-User Experience

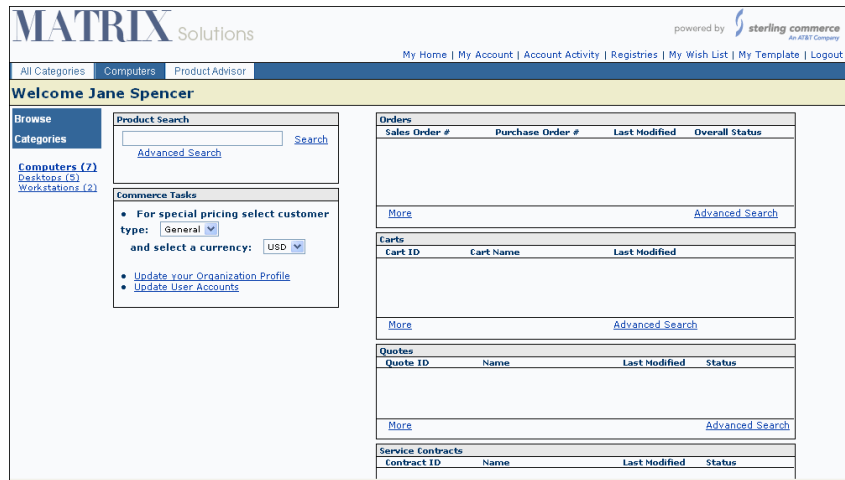
---

### **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, Bellissima, 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.

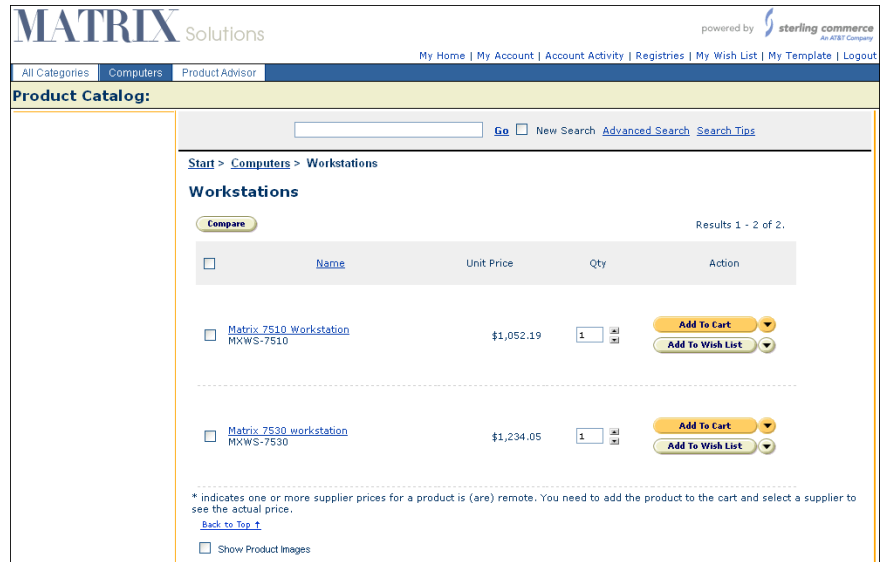
This displays the end-user home page.



**FIGURE 194. 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.



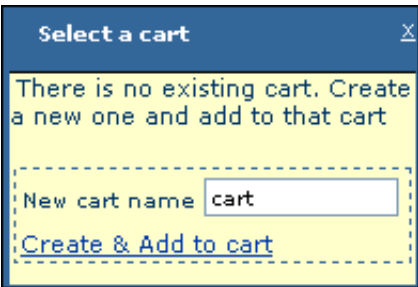
**FIGURE 195. Browsing the Product Catalog**

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.

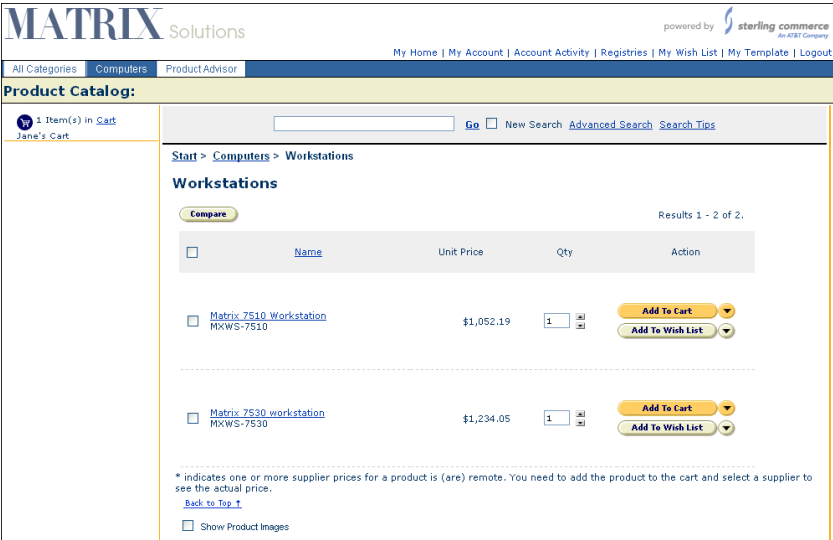
4. Find MXWS-7510.
5. Click the down arrow next to the **Add to Cart** button.

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



**FIGURE 196. 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 197. Adding a Product to the Shopping Cart**

- 8. Click the Cart link.

**MATRIX Solutions** powered by **sterling commerce**  
An IBM Company

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 >](#)

[Catalog Search](#)  [Go](#)  
[Advanced Search](#)

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

**Details** [Quick Add](#)

| Name                                                 | Availability          | Price      | Quantity                                      | Total      |
|------------------------------------------------------|-----------------------|------------|-----------------------------------------------|------------|
| <a href="#">Matrix 7510 Workstation</a><br>MXWS-7510 | Matrix Solutions Inc. | \$1,052.19 | 1 <a href="#">(all)</a> <a href="#">(all)</a> | \$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 |

[Update](#) [Checkout >](#)

**FIGURE 198. 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.

MATRIX Solutions

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

Order Details - Items Shipping from: Matrix Solutions Inc.

Sold-To

Jane Spencer  
FirstCommerce  
234 Advent Drive Suite 405  
Palo Alto, CA 94304 USA  
jspencer@firstcommerce.com  
[Change](#)

Shipping Details

Ship To:

Jane Spencer  
FirstCommerce  
234 Advent Drive Suite 405  
Palo Alto, CA 94304 USA  
[Change](#)

Ship Via:

Standard Shipping  
Ship when complete: Yes  
[what is this?](#)  
Deliver on:

Shipping Instructions:

Item Details

| Name                                                                            | Ship To | Ship Via | Quantity | Avail. | Amount     |
|---------------------------------------------------------------------------------|---------|----------|----------|--------|------------|
| <div>Matrix 7510</div> <div> <div>Workstation</div> <div>MXWS-7510</div> </div> |         |          | 1        | 0      | \$1,052.19 |
| Subtotals:                                                                      |         |          |          |        | \$1,052.19 |

Payment

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

Redeem Coupons/ Gift Certificates

Enter promo codes/ gift certificate # here:  
[Add](#)

Billing Address

Credit Card Number:  
Jane Spencer  
FirstCommerce  
234 Advent Drive Suite 405  
Palo Alto, CA 94304 USA  
[Change](#)

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](#)

**FIGURE 199. Checking Out**

The addresses shown are derived from one of three places:

- The Partner Profile

You will recognize the address in Figure 199 on page 218 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 200 on page 220).

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**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 4366605122 has been put in pending state for approval.

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

**Order Details**

**Order #:** 4366605122  
**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                                                                                                                                    |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Ship To:</b><br>Jane Spencer<br>FirstCommerce<br>234 Advent Drive Suite 405<br>Palo Alto, CA 94304 USA<br>Ship Via: Standard Shipping<br>Ship when complete: Yes<br>Deliver on:<br>Memo: | <b>PO Number:</b> None<br><br><b>Bill To:</b><br>Jane Spencer<br>FirstCommerce<br>234 Advent Drive Suite 405<br>Palo Alto, CA 94304 USA<br>Email Address: jspencer@firstcommerce.com<br>Account Number: 123456789<br>Charge Amount: \$1,167.93 | <b>Sold To:</b><br>Jane Spencer<br>FirstCommerce<br>234 Advent Drive Suite 405<br>Palo Alto, CA 94304 USA<br>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:                              |         |          |     |                |              | \$63.13    |
| Shipping Cost:                    |         |          |     |                |              | \$52.61    |
| Adj Shipping Cost:                |         |          |     |                |              | \$52.61    |
| Total Price:                      |         |          |     |                |              | \$1,167.93 |

FIGURE 200. Placed Order

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



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