

# ***Sterling Multi-Channel Selling Solution***

## **Overview Guide**

**Release 8.0.1**

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# Preface

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This *Overview Guide* and the associated documentation provide the information required for you to use the Sterling Multi-Channel Selling Solution at your site.

This guide introduces you to the Sterling Multi-Channel Selling Solution by presenting an overview of the product and its various component applications.

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## Audience

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

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

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

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This guide provides an introduction to the Sterling Multi-Channel Selling Solution. It covers:

- This chapter, CHAPTER 1, "Introduction", provides a basic description of the Sterling Multi-Channel Selling Solution.
- CHAPTER 2, "Consumer Experience", describes the e-commerce experience from the end-user's perspective.
- CHAPTER 3, "Managing the Consumer Experience" describes how you use the different Sterling Multi-Channel Selling Solution applications to create and support this e-commerce experience.
- CHAPTER 4, "Partners and the Sterling Multi-Channel Selling Solution" presents an overview of the role of your partners in the Sterling Multi-Channel Selling Solution.

For information about the new features in this release, see the *Sterling Multi-Channel Selling Solution Release Notes*.

---

## **Sterling Multi-Channel Selling Solution Software**

The Sterling Multi-Channel Selling Solution is a suite of integrated applications that enable all the ways in which an enterprise sells products: over the Web and through call centers, stores, and field sales. It provides a consistent buying

experience and hides complexity from end users while allowing your internal business users to assemble sophisticated products, services, and service bundles that can be priced or promoted in a variety of ways. You can customize the buying experience for your prospects, customers, and partners through personalized merchandising, marketing, and retention programs, allowing them to easily locate, configure, and purchase the products and services that meet their needs.

The Sterling Multi-Channel Selling Solution architecture conforms to the Java 2 Enterprise Edition (J2EE) standard published by Sun Microsystems, Inc. It is written using standard Java technologies: JavaServer Pages (JSPs) and servlets (modules of Java code that run in a servlet container to answer client requests). The JSP technology separates the user interface from content generation, enabling designers to change the overall page layout without altering the underlying dynamic content.

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

For more information about customization, see the *Sterling Multi-Channel Selling Solution Developer Guide*. For more information about the technical architecture of the Sterling Multi-Channel Selling Solution, refer to the *Sterling Multi-Channel Selling Solution Implementation Guide*.

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## **Sterling Multi-Channel Selling Solution Applications**

The Sterling Multi-Channel Selling Solution is written in Java and uses XML-based structured documents for data representation, transformation, and messaging. The Sterling applications that comprise the Sterling Multi-Channel Selling Solution are platform-independent and run on UNIX and Windows NT environments. Each application takes full advantage of the underlying distributed Sterling platform and integrates seamlessly with other Sterling applications.

### **Modularity**

The Sterling Multi-Channel Selling Solution is a set of interdependent modules that conform to a common organizational structure. In general, each module corresponds to a functional component of the Sterling Multi-Channel Selling Solution such as an application or a component of the Sterling Multi-Channel Selling Solution platform. Some modules may support both a Java API and a user

interface whereas others may just support a Java API provided to other modules. Some modules provide a set of “helper” classes, JSP pages, and other files such as Javascript files and images which are used by a number of other modules.

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

For more information about modularity, refer to the *Sterling Multi-Channel Selling Solution Developer Guide*.

---

## **Enterprise Server**

Any server that has installed the Sterling Multi-Channel Selling Solution is an enterprise server. Depending on your company’s customizations and the Sterling applications you purchased, each enterprise installation is different. Together, your enterprise installation and your partners form an e-commerce network.

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## **Implementation of an Enterprise Server**

The implementation of an enterprise server involves:

- installing it at your enterprise e-commerce site
- configuring the Sterling Multi-Channel Selling Solution for your site
- integrating the enterprise server with your existing e-commerce systems
- populating the Knowledgebase with all the information required.

At the enterprise site, integrating the Sterling Multi-Channel Selling Solution typically involves integration with one or more of the following:

- enterprise product catalog
- product configurator
- e-commerce system
- legacy partner information systems

For additional information about implementing your enterprise server, see the *Sterling Multi-Channel Selling Solution Implementation Guide*.

---

## Integration with ERP Systems

The Sterling Multi-Channel Selling Solution provides integration with ERP systems either directly, through the Sterling Integrator, or indirectly, by using the database server as a staging area.

The Sterling Integrator uses a combination of XML-based messaging and HTTP to integrate the Sterling Multi-Channel Selling Solution with an ERP system.

When a Sterling Multi-Channel Selling Solution user performs an action requiring that information be passed to the ERP system, the Sterling Multi-Channel Selling Solution generates an XML message that is posted to the HTTP server. The server manages the interaction with the ERP system and returns information to the Sterling Multi-Channel Selling Solution.

Conversely, if a change is made in the ERP system to a Sterling Multi-Channel Selling Solution entity (such as a customer order), then the change can be posted back to the Sterling Multi-Channel Selling Solution so that it is visible to users.

The Sterling Integrator supports the ability of the Sterling Multi-Channel Selling Solution to place orders into an SAP ERP system and to receive change or cancel order information from the SAP ERP system. Partner and product information can also be imported from the SAP ERP system, and this information can be updated as information in the SAP system is modified.

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

This integration with back-end ERP systems (through a database server) can be in real time or updated automatically or manually through a batch process. For more information about integrating with ERP systems, see "Integrating with Back-end Applications" on page 41 and the *Sterling Multi-Channel Selling Solution Implementation Guide*.

---

## Customizing Your Enterprise Server

You can customize the Sterling Multi-Channel Selling Solution for your company. Custom criteria include:

- Customize the customer-facing Web pages to match the look and feel of your company.
- Integrate with existing back-end enterprise resource planning (ERP) and order management systems.
- Map existing product, partner, and pricing data with the appropriate Sterling applications.
- Customize the Sterling Multi-Channel Selling Solution administration pages to match your company's business requirements.
- Integrate your e-commerce Web site with your partners' e-commerce Web sites.

---

## **Using the Sterling Multi-Channel Selling Solution**

The Sterling Multi-Channel Selling Solution software comprises multiple applications.

- Sterling Advisor™  
The Sterling Advisor™ application guides customers to the right products for their business needs through a questionnaire you design. See "Sterling Advisor" on page 30.
- Sterling Commerce Manager™  
Sterling Commerce Manager™ is the foundation upon which the other applications in the Sterling Multi-Channel Selling Solution operate. This application provides core system services such as security, back-office integration, integration with external e-commerce procurement systems and net marketplaces, and messaging. See "Configuration and Integration" on page 40.
- Sterling Configurator™  
The Sterling Configurator™ application enables you to create models representing configurable products. These models consist of available options. Your customers can select from these options to customize the products to their specific needs. See "Sterling Configurator and Visual Modeler" on page 31.

- Sterling Integrator™

The Sterling Integrator™ enterprise application integration (EAI) application enables the flow of business data between the Sterling Multi-Channel Selling Solution and enterprise resource planning (ERP) systems. See "Integrating with Back-end Applications" on page 41.

- Sterling Promotions™

The Sterling Promotions™ application enables you to create custom promotions for different customers. This application uses product data to link personalized marketing messages and promotions to a specific product. These marketing messages enable distributors to effectively up-sell, cross-sell, and inform customers of their value-added services. See "Displaying Promotions with Sterling Promotions" on page 34

- Sterling Orders™

The Sterling Orders™ application accepts orders and passes them on to order management systems. Your customer can check order status and modify orders. Your customer service representative can also check order status and modify orders. See "Sterling Orders" on page 38.

- Sterling Partner.com™

The Sterling Partner.com™ application enables your company to “host” your partners’ e-commerce Web sites on your servers or on application service providers (ASP) servers. See "Sterling Partner.com" on page 47.

- Sterling Pricing™

The Sterling Pricing™ application maintains pricing information and enables you to provide custom pricing for different customers. Customers can only buy products that are on active price lists that are assigned to their company (through the partner profile). This enables you to tailor your product offerings based on factors including geographic market or customer type (for example, OEM or consumer). See "Maintaining and Customizing Price Lists" on page 33.

- Sterling Product Manager™

The Sterling Product Manager™ application maintains your product catalog and provides product information to Sterling applications. See "Sterling Product Manager" on page 27.

- Sterling Profile Manager™

The Sterling Profile Manager™ application creates and maintains profiles for your enterprise partners and customers. Each partner created in Sterling Profile Manager is linked to price list(s) created in Sterling Pricing. This linkage enables customers to view customized pricing when selecting, comparing, and purchasing products. See "Managing Partners, Customers, and Users" on page 23.

- Sterling Quotes™

The Sterling Quotes™ application provides your customer with a personalized workspace to build and manage product inquiries, quotes, and requests for quotes (RFQs). It also enables your customer service representative to approve or reject quotes and RFQs, as well as modify quotes and RFQs as necessary. See "Sterling Quotes" on page 25.

- Sterling Returns™

The Sterling Returns™ application enables you to automate your return process using the Internet. It integrates with both order management and ERP systems. Your customer service department can use this application to view and modify returns as necessary. See "Sterling Returns" on page 38.



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

This chapter describes how the Sterling Multi-Channel Selling Solution supports a consumer's online purchasing experience.

---

## **Purchasing Experience**

Consumers purchase items by placing them into a cart and placing the cart as an order. They can place multiple items in a cart and add and remove items before placing the order. Consumers can have multiple carts, allowing them to place orders at different distributors and suppliers, and they can create templates for orders that they place regularly, wish lists for items they would like others to buy for them, and gift registries for special occasions. They can save carts as quotes, and use carts to negotiate prices. Consumers can select partners based on pricing, product availability, or geography (for example, the location of a shipping facility).

The Sterling Multi-Channel Selling Solution enables you to provide e-commerce to your consumers by facilitating the following:

- **Personal workspaces for consumers**

Partner users and registered users have a workspace that includes their cart(s), personal address books that include shipping and billing information, status of orders in progress, status of returned items, and so on. If your enterprise has storefronts associated with it, consumers associated with a particular storefront partner can only request product and availability information from that partner.
- **Anonymous user, partner user, registered user, and storefront user support**

Enterprises support e-commerce with anonymous, partner, registered, and storefront users. When an anonymous user attempts to place an order, the Sterling Multi-Channel Selling Solution prompts the user to register.
- **Guided selling**

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

With Sterling Pricing, you can create multiple price lists. With Sterling Profile Manager, you assign price lists to partners and storefronts that contain the products and prices relevant for them. Partner users can only see and buy products that are included in price lists assigned to their partner. To prevent a particular partner's users from purchasing a particular product line, do not assign price lists with the product line to that partner. For more information, see "Maintaining and Customizing Price Lists" on page 33.
- **Quotes and order management**

With the Sterling Multi-Channel Selling Solution, consumers can obtain product information, select products, get prices, configure products, and place an order.

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

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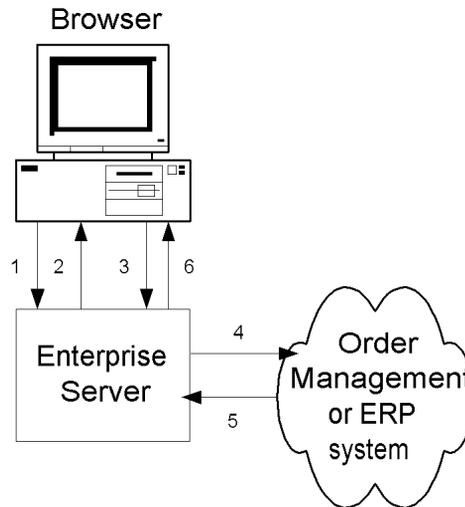
## Conducting e-Commerce

A consumer buying products from your enterprise Web site may be registered or anonymous (unregistered). Registered users may be storefront users or partner users.

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

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

The following diagram illustrates how the consumer conducts e-commerce on your enterprise Web site.



**FIGURE 1. Flow of Information for a Typical e-Commerce Request**

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

1. A consumer navigates to the enterprise site, creates a cart, and begins selecting products.

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

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

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

Once the consumer is satisfied with the products (and their configurations) in the cart, they submit an order.

If the consumer is anonymous, they must either log in or register. If the consumer is already registered, they can update their information, including shipping and billing addresses.

4. The enterprise server passes the order to the back end order management or other order fulfillment system.
5. The order management system acknowledges the order and passes a confirmation message to the enterprise server.
6. The enterprise server displays a confirmation message indicating whether the order is successful.

---

## **e-Commerce Using Sterling Applications**

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

1. The consumer logs into your e-commerce Web site.

If the consumer is registered, the Sterling Multi-Channel Selling Solution provides the authentication information. The Sterling Quotes application provides the consumer with a workplace.

2. The consumer selects products and, if necessary, configures them.

The Sterling Quotes application keeps track of the consumer's products in a product inquiry list. The Sterling Advisor application guides the consumer to products that best meet his or her requirements. The Sterling Product Manager application provides the product information. The Sterling Pricing

application, working with the Sterling Profile Manager, provides pricing information. The consumer uses the Sterling Configurator application to configure the product.

3. The consumer can view promotions.

The ***Sterling*** Promotions application serves up the promotions.

4. The consumer can submit a request to negotiate prices.

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

5. The consumer places an order.

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

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

6. The consumer may return items in an order.

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

---

## **Guided Selling**

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

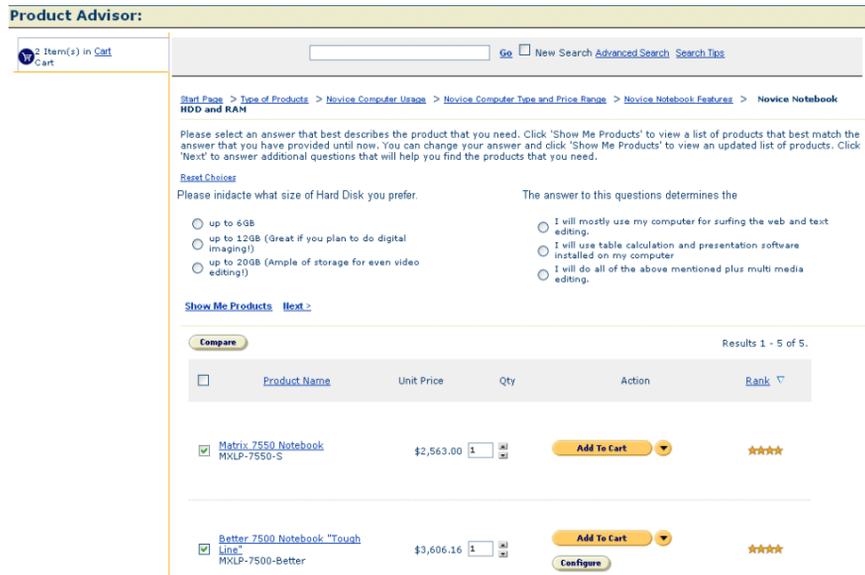


FIGURE 2. Sample Questionnaire Page

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

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

- Filters the list of products that meet their criteria.

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

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

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

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

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

Depending on the answers your consumers have chosen, the Sterling Advisor application may also:

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

Questions often are displayed on more than one questionnaire page. In some cases, a questionnaire page that includes a specific question may lead to another questionnaire page that includes the same question. When your consumer encounters this situation, the answer they chose on the previous questionnaire page is selected by default on the second questionnaire page. Answers to other questions may be inferred from a consumer's answers to previous questions.

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

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

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

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

passed to the Sterling Advisor application. See "Sterling Advisor" on page 30 and the *Sterling Multi-Channel Selling Solution Implementation Guide* for more information.

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

---

## **Browsing the Product Catalog**

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

The screenshot displays the Matrix Solutions Product Catalog interface. At the top, the logo for Matrix Solutions Graphic Desktop Systems is visible, along with navigation links for 'My Home', 'My Account', 'Account Activity', and 'Logout'. A 'POWERED BY COMERGENT' badge is also present. Below the navigation bar, a 'Product selection' section includes a search bar and a 'Go' button. A horizontal menu lists categories: 'All Categories', 'Computers', 'Handhelds', 'Peripherals', 'Software', 'Accessories', 'Outlet', and 'Product Advisor'. The main content area is titled 'Product Catalog:' and features a 'Narrow By' sidebar on the left with expandable filters for categories like 'Accessory Card Slots', 'Computer Type', 'Hard Drive', 'Hard Drive Options', 'Harddisk size', 'Internet Connectivity', 'Memory', and 'Memory Options'. The main product list is titled 'Desktops' and shows 'Results 1 - 18 of 18'. A 'Compare' button is available. The product list includes columns for 'Product Name', 'Unit Price', 'Qty', and 'Action'. Four products are listed: 'Aggregated product MXDS-AGP1' (From \$875.00), 'Aggregated product2 MXDS-AGP2' (From \$246.00), 'Assembly MXDS-ASB1' (\$654.00), and 'Assembly MXDS-ASB2' (\$567.00). Each product has an 'Add To Cart' button and a 'View Parts' button. A 'Supersedes' entry is also visible at the bottom of the list.

FIGURE 3. Product Catalog

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

**matrixsolutions**  
GRAPHIC DESKTOP SYSTEMS

product selection

POWERED BY COMERGENT

My Home | My Account | Account Activity | Logout

All Categories Computers Handhelds Peripherals Software Accessories Outlet Product Advisor

**Product Catalog:**

Browse Categories  
Outlet (2)

Narrow By  
Collapse

Accessory Card Slots  
2 (0)  
4 (7)

Computer Type  
Desktop (10)

Hard Drive  
120GB Hard Drive (2)  
160GB Hard Drive (2)  
20GB Hard Drive (1)  
30GB Hard Drive (2)  
40GB Hard Drive (2)  
75GB Hard Drive (1)

Hard Drive Options  
160GB Hard Drive (4)  
30GB Hard Drive (4)  
40GB Hard Drive (4)  
75GB Hard Drive (4)

Harddisk size  
up to 120GB (10)  
up to 20GB (2)  
up to 60GB (10)

Internet Connectivity  
Cable Modem (9)  
DSL (9)  
Ethernet (7)  
Modem (10)

Memory  
128 MB RAM (3)  
192 MB RAM (2)  
256 MB RAM (3)  
512 MB RAM (1)  
64 MB RAM (1)

Memory Options

Start > AdvancedSearch

**AdvancedSearch**

Compare Results 1 - 18 of 18.

<input type="checkbox"/>	Product Name	Unit Price	Qty	Action	Rank
<input type="checkbox"/>	Aggregated product MXDS-AGP1	From \$875.00		Select	1
<input type="checkbox"/>	Aggregated product2 MXDS-AGP2	From \$246.00		Select	2
<input type="checkbox"/>	Assembly MXDS-ASB1	\$654.00	<input type="text" value="1"/>	Add To Cart View Parts	3
<input type="checkbox"/>	Assembly MXDS-ASB2	\$567.00	<input type="text" value="1"/>	Add To Cart View Parts	4
<input type="checkbox"/>	Supersedes MXDS-Exp1 MXDS-SUPS1	\$876.00	<input type="text" value="1"/>	Add To Cart	5

**FIGURE 4. Searching for a Product**

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

## Entering Products

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

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

By using the supersession feature of the Sterling Product Manager, you can ensure that superseding product IDs automatically replace obsolete product IDs. For example, if the consumer enters a product ID for an obsolete product, the product displays with a link to the product which supersedes it. For more information on supersession, see "Sterling Product Manager" on page 27.

---

## **Using a Cart**

At any point in creating a cart, consumers can do several things:

- Add one or more of the displayed products to their cart.  
Consumers determine the desired quantity of an item then click **Add to Cart**.
- Compare two or more of the products.  
If consumers wish to compare two or more products from the list, they select the products to compare and click **Compare**. A new browser page displays the products arranged in a table that enables direct comparison of the products' features.

In addition, the consumer may be able to:

- Configure a product.  
If you offer products that can be configured, you can enable your consumers to configure these products themselves. This option is only available for configurable products, and requires a configuration application such as the Sterling Configurator application.
- View any resources assigned to a product.  
If you assign resources to products, you make it possible for consumers to see these resources, either through a link, or on the generated page itself. Your Sterling Multi-Channel Selling Solution implementor or developer can edit the JSP templates to display these resources.  
For example, you can create a product image resource, and display the image (or a link to the image) with the product.
- View details about a product.  
By clicking on the product ID, consumers view detailed information about the product features.

- View promotions.

By clicking on a promotion icon, consumers view the promotion for the selected product.

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

---

## **Quotes and Requests to Negotiate Prices**

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

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

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

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

---

## **Placing an Order**

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

---

## **Checking Order Status**

Once an consumer places an order, the consumer can check the status of the order at any time.

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

3. The consumer views and makes changes to the order.

<b>Note:</b> A consumer can make changes to a line item in an order when the status of the line item is In Process. Once the line item begins to ship (the status of the line item changes to Partial Shipped or Shipped), no changes are allowed.
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4. The Sterling Orders application verifies the consumer's changes.

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

---

## **Creating a Return**

Consumers can return part of an order, or all the line items in an order.

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

2. The consumer clicks the order.

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

3. The consumer clicks **Request Return**.

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

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

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

5. The consumer initiates the return request.

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

6. The Sterling Returns application sends an email to the consumer with the status. Alternately, the consumer can navigate to the Returns page and check on the status of the return request.
7. If the return request is pending, then the customer service representative either accepts or rejects the return.
8. If the return request is accepted, then the Sterling Returns application sends a request to the back-end order management or ERP system requesting a return material authorization (RMA) number.
9. The order management system or ERP system responds with a RMA number and the mailing instructions.
10. The Sterling Returns application sends this information to the consumer in an email.
11. The consumer receives the shipping information and sends the product back to your company.

---

The previous chapter described how the consumer experiences the Sterling Multi-Channel Selling Solution. This chapter describes how administrators use the Sterling Multi-Channel Selling Solution to manage that experience.

---

## **Managing Partners, Customers, and Users**

Sterling Profile Manager enables you to create and maintain a profile for each of your partners. The partner profile includes such information as organization type, level (such as gold, silver, or platinum), and billing and shipping addresses. Storefront administrators can also create and maintain profiles for their own partners. For more information, see "Sterling Partner.com" on page 47.

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

Using Sterling Profile Manager, you create an administrator for each partner. Each partner administrator creates partner users and assigns functions to each one. The partner users can then log in and conduct e-commerce activities as described in the

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

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

- Create and maintain enterprise users

These are the users who can log in to the enterprise home page and administer some or all modules of the Sterling Multi-Channel Selling Solution.

- Associate partners with one or more price lists

Once you create the price lists (see "Maintaining and Customizing Price Lists" on page 33), you use Sterling Profile Manager to associate these price lists with the right partners.

<p><b>Note:</b> You can set a business rule so that price lists are used for entitlement only. This means that price lists assigned to partners define only the products the partners are entitled to purchase, not the prices for those products. Prices are obtained from an external source rather than the price lists. See the <i>Sterling Multi-Channel Selling Solution Implementation Guide</i> for information about configuring the Sterling Multi-Channel Selling Solution to get prices from an external source.</p>
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- Export partner information in a spreadsheet application
  - Review partner activity using the information provided by the partner.
- See "Monitoring the Sterling Multi-Channel Selling Solution" on page 36 for details on how you use Sterling Profile Manager for this activity.

Storefront administrators can perform these functions only for their storefront.

Refer to the *Sterling Multi-Channel Selling Solution Administration Guide* for more detailed information about creating and maintaining partners, storefronts, customers, and users.

---

## Managing the Purchasing Experience

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

## **Sterling Quotes**

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

The Sterling Multi-Channel Selling Solution enables you to communicate with your partner's Web sites. If some of your partners are unable to maintain a separate e-commerce Web site, you can create a storefront for them. You or one of Sterling's application service providers (ASP) can host their Web site. For more information about hosting, see "Sterling Partner.com" on page 47.

### *Integration*

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

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

### *Purchasing Experience*

The Sterling Quotes application:

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

End-users use Sterling Quotes to accomplish the following tasks:

- Manage their cart(s) and orders in their own personalized workspace.  
All registered and partner users have personal workspaces where they may keep one or more carts, check on orders, update shipping and billing information, and initiate returns.  
Although anonymous (unregistered) users do not have their own personalized workspace until they register, the Sterling Multi-Channel Selling Solution tracks their choices during the session to giving them the same unique experience as other users.
- View enterprise and partner promotions on products.  
The end-user sees the partner promotions when a price and availability request is sent to that partner.
- Create copies of carts.
- Move line items from one cart to another prior to ordering (based on pricing, availability or shipping needs).  
This enables an end-user to create multiple orders that can be fulfilled by different partners, shipped to different locations, approved by different people, and so on.
- Route carts to different users for approval or request modification.
- Maintain their own user profile, including contact, shipping, and billing information.
- Place an order directly with an enterprise, partner, or storefront partner.
- Select partner(s) based on business or geographic attributes.
- Obtain multiple price and availability requests from different partners.
- Submit requests to negotiate prices and enable customer service representatives to manage these requests and convert them to quotes.

Refer to the *Sterling Multi-Channel Selling Solution Administration Guide* for step-by-step instructions.

### **Sterling Portal**

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

specification. You can personalize the user experience by modifying the layout of portal pages and by selecting the content to display in each portlet. For more information about the portal framework, refer to the *Sterling Multi-Channel Selling Solution Developer Guide*.

### **Widgets**

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

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

### **Creating Your Own Widgets**

You can create custom widgets that contain information you wish to convey to your end-users. For more information about the generic widget framework, refer to the *Sterling Multi-Channel Selling Solution Developer Guide*.

---

## **Maintaining the Product Catalog**

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

### **Sterling Product Manager**

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

### ***Hot Spots***

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

### ***Pre-Configured Products***

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

### ***Aggregated Products***

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

### ***Not Sold Separately***

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

### ***Non-Shippable Products***

It may not be possible to ship certain products, particularly oversized products. While creating or modifying a product, you can specify that a product is not shippable by checking the “Not Shippable” check box.

### ***Not Eligible for Shipping Discounts***

Certain products may not be eligible for discounts on the shipping charges. While creating a product, you can specify that a product is not eligible for shipping discounts by checking the “Not Eligible for Shipping Discounts” check box.

### ***Not Eligible for In-Store Pick-Up***

Certain products may not be available for in-store pickup, for example, products that are sold infrequently and not stocked in stores. While creating a product, you can specify that a product is not eligible for in-store pick-up by checking the “Not Eligible for In-Store Pickup” check box.

### ***Supersession***

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

### ***Exporting and Importing Product Data***

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

<b>Note:</b> Only enterprise administrators can import and export product information through data syndication.
-----------------------------------------------------------------------------------------------------------------

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

### ***Enabling Partners to Create Products on the Enterprise Site***

A multi-vendor catalog (a product catalog that contains the products and services for multiple vendors) opens your product catalog to your selling partners. In this

way, you enable them to expand your catalog and complement your products by including their value-added products and services in your product catalog.

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

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

### **Sterling Advisor**

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

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

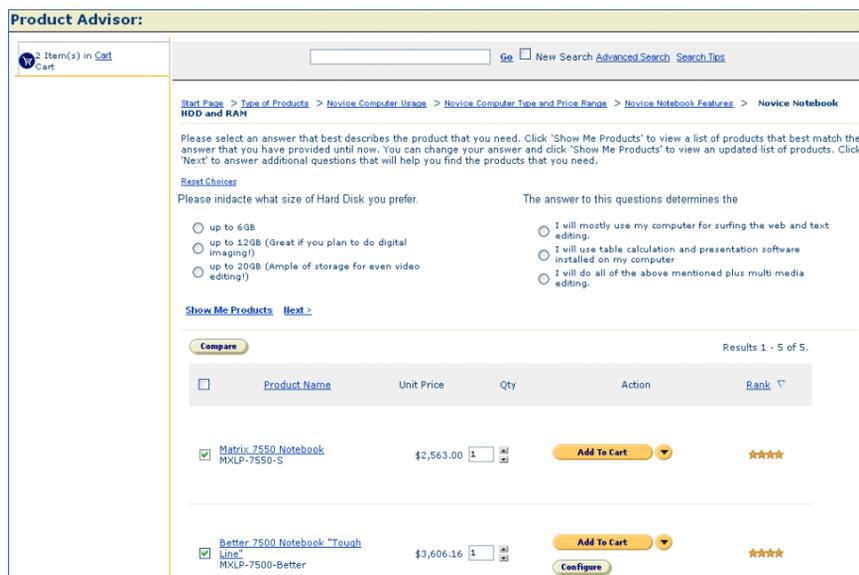


FIGURE 5. Sample Questionnaire Page

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

Refer to the *Sterling Multi-Channel Selling Solution Administration Guide* for more detailed information about Sterling Advisor and its concepts.

## Sterling Configurator and Visual Modeler

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

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

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

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

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

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

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

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

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

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

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

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

### ***Mobile Configurator***

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

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

---

## **Maintaining and Customizing Price Lists**

The Sterling Pricing application is integrated with other Sterling applications to enable you to deliver customized pricing upon request and is the sole repository of pricing information in the Sterling Multi-Channel Selling Solution.

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

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

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

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

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

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

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

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

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

## Customers and Prices

Partners who are enabled for Sterling Partner.com can create customers, that is, they can create partner profiles for companies with which they do business. Typically, these are companies who have partner and user profiles created for them by the enterprise administrator. See "Sterling Partner.com" on page 47 for more information.

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

---

## Displaying Promotions with Sterling Promotions

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

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

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

The Sterling Multi-Channel Selling Solution dynamically generates promotions. An end-user clicks a promotion icon that is displayed in a cart or in the Sterling Advisor product comparison page to view the promotion.

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

- Promotions are targeted to end-users based on any combination of partner type, partner level, and product interests.
- Effectivity dates may be used to coordinate with the starting and ending dates of marketing campaigns.
- Promotions with higher priorities take precedence over lower priority promotions.
- Promotions may be enabled or disabled at any time, regardless of their effectivity dates.
- Promotions can be represented by an image (in either a GIF or JPG file) or by a URL (for a page that provides the promotion text).

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

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

Marketing administrators use Sterling Promotions to accomplish these tasks:

- Create, modify, or delete promotions
- Disable promotions
- Determine the URL, image, or text description for a promotion
- Determine the effectivity dates for a promotion
- Determine the product(s) for each promotion

See the *Sterling Multi-Channel Selling Solution Administration Guide* for more information about maintaining promotions.

---

## **Marketing With Customer Segments**

The Sterling Multi-Channel Selling Solution provides the ability to target promotions to sets of users, or segments. Customer segments are storefront-specific groups of users and/or organizations that share certain attributes or behaviors, such as income level (attribute) or buying certain types of products (behavior). Defining customer segments allows you to target marketing campaigns directly to the users who are most likely to be interested in the products or promotions, and to assign special pricing rules or coupons to products offered in segment marketing campaigns.

Segments and segment names are storefront-specific and are not shared among storefronts.

After you define a segment, you submit the segment definition for processing. Segment calculation scripts resolve the criteria into a list of users. The result must be published to a production system so that it is available for use in marketing activities. A marketing activity applies to a given user if the user belongs to the user list of a segment that is associated with the activity.

See the *Sterling Multi-Channel Selling Solution Administration Guide* for more information about customer segments.

---

## **Monitoring the Sterling Multi-Channel Selling Solution**

The Sterling Multi-Channel Selling Solution includes applications and tools that enable you to manage your products and sales channels most effectively.

### **Partner Forecast**

Enterprises can use the Sterling Multi-Channel Selling Solution to forecast demand for their products by asking their selling partners to submit periodic forecasts of demand for enterprise products. Once the forecasts have been submitted, you can use the Sterling Analyzer application to analyze the information.

The Sterling Multi-Channel Selling Solution supports the submission of quarterly forecasts.

Your partners log into the Sterling Multi-Channel Selling Solution server at the enterprise site and upload their sales forecast report by clicking the **Forecast** tab on their Organization Profile page. Refer to the *Sterling Multi-Channel Selling Solution Administration Guide* for additional information about sales forecasts.



FIGURE 6. Partner Forecast Tab

## Viewing Partner Activity

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

---

## Managing Leads

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

Each partner (in the form of a partner lead administrator) can accept or reject the lead. The partner lead administrator and partner lead users manage the lead as described in "Partner Leads Management" on page 52.

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

---

## **Providing Efficient Customer Service**

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

### **Sterling Orders**

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

The Sterling Orders application provides information about the order status and order management at the line item. Each line item in an order has an individual status, and can have a separate shipping method, shipping address, or delivery date. End-users can update order quantities, add, delete, or return individual line items in an order, and review order status. Customer service representatives can change and delete line items, change shipping and billing information, and change the delivery date. Using Sterling Orders, the customer service representative can also track in real-time any changes made to an order until it is delivered.

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

Refer to the *Sterling Multi-Channel Selling Solution Administration Guide* for step-by-step instructions on managing orders and creating orders on behalf of partners.

### **Sterling Quotes**

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

### **Sterling Returns**

The Sterling Returns application enables you to automate your product return process through your e-commerce Web site. Once an end-user has placed and

received the partial or complete order, the end-user can select one or more line items to return subject to the following restrictions:

- An end-user cannot return line items until they have been shipped.
- An end-user can return all the line items in an order but cannot return the entire order as one unit.
- An end-user can return a partially shipped item. However, the end-user cannot change anything about that line item once the line item begins to ship.

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

The Sterling Returns application acts as the front end to a back-end order management system in which the actual bookkeeping for returns is maintained. In this arrangement, the end-user initiating the return interacts with Sterling Returns. The actual returns processing (including validating returns, receiving returns, crediting the end-user's account, shipping replacement products, and so on) is performed by the order management system.

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

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

- Request is denied.  
The Sterling Returns application denies the request with a brief explanation and possibly, the contact information for customer service where the request may be pursued manually.
- Request is pending.  
The Sterling Returns application cannot make the decision automatically and requires the assistance of a customer service representative. Sterling Returns informs the end-user of the situation.

- Request is accepted.

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

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

---

## Job Scheduler

The Job Scheduler enables you to create and maintain cron jobs in the Sterling Multi-Channel Selling Solution. In addition to typical system cron jobs (such as cache cleaning), you can set up application cron jobs to handle such things as product catalog import and export. By setting a username and password, you can restrict the running of application cron jobs to entitled individuals.

<b>Note:</b>	The user that creates the cron job through the Job Scheduler link does not need to be the same user that runs the cron job. There can be two users: a job scheduler user (that creates the cron job) and an application user (that runs the cron job).
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Using the Job Scheduler, you can display a list of jobs, create new jobs, display and update configuration information for a job, and determine the frequency of the job.

You can set both the starting and stopping time for a job, and the units for the job (for example, seconds, minutes, and so on). For more information on Job Scheduler, refer to the *Sterling Multi-Channel Selling Solution Administration Guide*.

---

## Configuration and Integration

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

## **Application Platform Services**

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

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

For more information on XML messages and Sterling Multi-Channel Selling Solution security, refer to the *Sterling Multi-Channel Selling Solution Reference Guide*.

## **System Configuration**

The Sterling Commerce Manager enables you to set certain properties that define the behavior of the modules in the Sterling Multi-Channel Selling Solution.

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

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

## **Integrating with Back-end Applications**

The Sterling Multi-Channel Selling Solution includes two products that enable you to integrate with back-end systems: Sterling Integrator and Sterling Commerce Manager.

### *Sterling Integrator*

The Sterling Integrator application enables the flow of business data between the Sterling Multi-Channel Selling Solution and back-end systems including enterprise resource planning (ERP) and other enterprise applications. This bidirectional data flow occurs in real-time, event-driven transactions or scheduled batch operations.

This application also contains prebuilt adapters to certain ERP systems. These adapters handle the management of the application connection including initialization, connection, verification, and shutdown. For more information on these adapters, refer to the *Sterling Multi-Channel Selling Solution Implementation Guide*.

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

### ***Sterling Commerce Manager***

Among its other capabilities (see "Sterling Commerce Manager™" on page 5), Sterling Commerce Manager enables your e-commerce system to integrate with external e-commerce procurement systems. Your company can participate in net marketplaces by distributing targeted information while still controlling product data from a central location. Your company can control the selling experience (guided selling, needs analysis, product search, comparison, configuration, and promotions).

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

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

# *Partners and the Sterling Multi-Channel Selling Solution*

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CHAPTER 2, "Consumer Experience" described how consumers experience the Sterling Multi-Channel Selling Solution. CHAPTER 3, "Managing the Consumer Experience" described how you, as enterprise employees, use the Sterling Multi-Channel Selling Solution to provide this experience. This chapter describes how your selling partners, in the person of a partner administrator, manage the system.

---

## **Creating Partner Users**

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

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

- CommerceUser/User

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

- Administrator  
All partner administrators can create other partner users and update the partner as well as their own user profile. Depending on their relationship with your enterprise, partner administrators may have additional responsibilities, described later in this chapter.
- Lead User  
The partner lead administrator assigns the lead to one or more people who have the lead user role. The partner lead user works with the lead contact to convert the lead to an order.
- ProcurementUser  
This role enables partner users to punch into the Sterling Multi-Channel Selling Solution from external e-commerce procurement systems. Authentication information is stored in this partner user profile.

### **Creating Users for Customers**

As described in "Sterling Partner.com" on page 47, partners enabled for Sterling Partner.com are either Partner.com Partners or Storefront Partners. Partner administrators for either can create partners called customers. The partner administrator can create users for these customers with the following roles:

- Administrator (Storefront Partners only)  
These users can create other users and update the partner as well as their own user profile.
- CommerceUser (Storefront Partner only)  
These users can log into the storefront maintained for the Storefront Partner by the enterprise and participate in the commerce experience.
- TransferUser  
Users with this role typically are associated with partners who also have a partner profile and a user profile created by the enterprise administrator. The user logs into the enterprise site with the username and password assigned by the enterprise administrator. When they perform a price-and-availability check with the Sterling Partner.com-enabled partner for whom they are a customer, they can use either their enterprise username and password or their customer username and password. Using the latter gives them access to special prices.

## Updating Partner Information

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

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

**matrixsolutions**  
GRAPHIC DESKTOP SYSTEMS  
product selection

POWERED BY COMERGENT  
My Home | My Account | Account Activity | Help | Logout

**Organization Profile: Anderel**

Info | Addresses | Detail | Business | Hierarchy | Commerce | Forecast | Notes

View Users Save

NOTE: (\*) items are required.

**General Information**

Profile name \*  
Anderel

Main telephone  
610-6800

Main facsimile  
N/A

Profile type \*  
Distributor

Profile level \*  
Silver

XML Message Version  
dXML 4.1.1

Login/Password required

Organization website address  
www.anderel.com

Organization Email  
corp@anderel.com

Distributors  
Select to add

Message URL  
http://192.168.200.247

Content Type

Custom Field #1

Custom Field #2

Custom Field #3

Custom Field #4

Custom Field #5

**Profile Status**

Status  
Open

**Accounts**

Currency  
USD

Credit Limit  
\$5,000.00

Available Credit  
\$5,000.00

Co-op %  
0.000

Co-op Account Maximum  
\$0.00

FIGURE 7. Partner Profile

## Creating a Partner Hierarchy

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

franchises and retail outlet chains. You can mirror these complex structures by creating not simply a partner but a hierarchy belonging to a partner.

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



FIGURE 8. Hierarchy Tab

## Uploading your Partner Forecast

Enterprises can use the Sterling Multi-Channel Selling Solution to forecast demand for their products by asking their selling partners to submit periodic forecasts of demand for enterprise products. Once the forecasts have been submitted, the enterprise can use the Sterling Analyzer application to analyze the information.

The Sterling Multi-Channel Selling Solution supports the submission of quarterly forecasts.



FIGURE 9. Partner Forecast Tab

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## Sterling Partner.com

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

Partners are enabled for Sterling Partner.com as one of two types of partner: as a Partner.com Partner or as a Storefront Partner.

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

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

## **Administration Tasks**

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

- using the Sterling Profile Manager application to manage their partners and users
- viewing commerce activity
- using the Sterling Pricing application to create and maintain their price lists

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

- using the Sterling Product Manager application to create products

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

- uploading product and product availability
- uploading the partner logo (for display on the partner pages that are displayed to the customer)
- uploading email templates

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

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

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## **Partners and Promotions**

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

In a typical Sterling Multi-Channel Selling Solution installation, partner servers respond to price and availability requests received from enterprise servers.

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

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

See "Displaying Promotions with Sterling Promotions" on page 34 for additional information about this application.

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## **Creating Products**

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

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

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

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

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

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

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

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

<p><b>Note:</b> All administrators at a partner company have equal privileges. A partner administrator can modify or delete a product that another partner administrator (at the <i>same</i> company) has created.</p>
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When indirect customers view your product catalog, they see only products on price lists associated with their partner company. As an enterprise administrator, it is *your responsibility* to associate the right price lists to your customers. North American companies should only see products appropriate for them. You should not associate any price lists created by Asia Computer Accessories to these North American companies.

For detailed information on opening product categories to partner administrators, refer to the *Sterling Multi-Channel Selling Solution Administration Guide*.

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## **Creating Price Lists**

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

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

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

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

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

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

<b>Note:</b> It is your responsibility to associate the right price lists to your customers.
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As an enterprise administrator, you create these partners (if they do not already exist) using the Sterling Profile Manager application. You then associate the appropriate price list(s) created by the partner administrators to each of these partners.

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

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

### **Pricing for Partners Participating in a Multi-Vendor Catalog**

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

#### ***Creating Price Lists***

Like enterprise administrators, partner administrators can create price lists. They can add any products in product categories that are "open" to their partner to the price lists they create. For more information on making products available to partners, see "Enabling Partners to Create Products on the Enterprise Site" on page 29.

All partner administrators have full and equal access to price lists created by any partner administrator at their company. However, partner administrators *do not* have access to price lists created by another company's partner administrator, nor any price lists created by an enterprise administrator.

<p><b>Note:</b> Enterprise administrators have full access to all price lists, including those created by any partner administrator. An enterprise administrator can modify or delete price lists created by a partner administrator.</p>
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### ***Associating Price Lists***

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

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## **Partner Leads Management**

The enterprise creates and assigns leads to partners as described in "Providing Efficient Customer Service" on page 38. After an enterprise (in the person of an enterprise lead administrator) assigns a lead to one or more of its partners, the partner lead administrator can accept or reject the lead. If they accept the lead, then they assign the lead to one or more partner lead users.

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

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