IBM<sup>®</sup> WebSphere<sup>®</sup> Commerce V7 Feature Pack 2 – Lab exercise

## **Price rules**

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## What this exercise is about

In this tutorial, you will learn how to use WebSphere Commerce Management Center **Catalog Filter and Pricing tool** to create price rules. You will learn how to use a price constant in a price equation to control the percentage discount of entitled categories of customer contracts. You will also learn how to assign the price rules to B2B store's contracts within Accelerator. By the end of the lab you will go to the storefront to verify your price rules.

This lab is created for learning WebSphere Commerce Feature Pack 2 Price Rule solution only. It is provided **AS-IS**, with no formal IBM support.

## What you should be able to do

After completing this exercise, you should be able to:

- Create price rules from Management Center Catalog Filter and Pricing tool
- Assign the price rules to a B2B store contracts within the Accelerator

### Introduction

The following naming conventions are used in the exercises:

Reference Variable	Description
<hostname></hostname>	Hostname for WebSphere Commerce
<elite_store_identifier></elite_store_identifier>	Elite starter store identifier you selected when you publish Elite-FEP.sar. For example: <b>Elite-FEP</b>
<elite_store_dir></elite_store_dir>	Elite starter store's store directory

## Requirements

Before beginning this lab, ensure you have:

- Installed WebSphere Commerce V7 fix pack 2
- Installed WebSphere Commerce V7 feature pack 2
- Completed feature enablement
- Published feature pack Elite starter store archive Elite-FEP.sar

After publishing complete, you can launch the store using the URL:

http:// <Hostname>/webapp/wcs/stores/servlet/<Elite\_Store\_Dir>/index.jsp

Note: <Elite\_Store\_Dir> is the store directory you selected when you publish **Elite-FEP.sar** from the WebSphere Commerce Administration Console.

## Part 1: Create price rules for Elite starter store

In this part of lab, you will create a price constant, a price equation, a nested price rule and two normal price rules. The price constant is a percentage number that will be used in the price equation to calculate discount price. A nested price rule will be created to use the price equation. You will also create two normal price rules to use the nested rule.

1. Open Catalog Filter and Pricing tool.

\_\_\_a. Launch the WebSphere Commerce Management Center using following URL

https://<Hostname>:8000/lobtools

- \_\_\_\_b. Log on to the Management Center with your site administrator ID and password.
- \_\_\_\_ c. Select **Catalog Filter and Pricing** from the Management Center Tools list.

	Management Center Tools 👻	_
~	📳 Catalogs	
	🚔 Marketing	
	S Promotions	
	🖏 Assets	***
	🔂 Catalog Filter and Pricing	
	Installments	
	🚻 Store Management	
	Getting Started	ŀ
	Preferences	

- \_\_\_\_d. Select the store with identifier <Elite\_Store\_identifier>
- 2. Create a Percentage Constant.
  - \_\_\_\_a. Select Create new > Percentage Constant.



\_ b. Complete the fields shown in the screen capture below. This constant will be used in a price equation to mark down product prices by 30 percent.

*VIPDiscount	Save and Close Close
General Properties	
*Name	VIPDiscount
Description	percentage discount to all VIP customers
Format	Percentage
*Percent (%) 🛈	30

#### \_\_\_\_ c. Click Save and Close.

- 3. Create an equation to calculate the discount.
  - \_\_\_\_a. Select Create new > Price Equation.



\_ b. Complete each field shown in the screen capture below.

Note: In order to create the price equation shown in the **Equation preview** area, you need to select the Equation builder elements by clicking the **Create New** button (highlighted in red), and then provide the values for each element.

*VIPDiscountEq	uation		Save and Close	Close
General Properties				
*Name 🕕	VIPDiscountEquation			
Description				
Equation preview 🛈	Output Price Ir	nput price <b>* ( 1 -</b>	)	
		(VIPDiscount)		
	1 · 1 · 1 · 1 · 1 · 1 · 1 · 1 · 1 · 1 ·	in the second		
Equation builder 🕕	Туре	Value		
	Input price			
	Math Symbol	*		
	Parenthesis	(		
	Number	1		
	Math Symbol			
	Price constant	VIPDiscount		
	Parenthesis	)		
	1 of 7 selected			

- \_\_\_\_ c. Click the **Save and Close** to save the equation.
- 4. Create a nested price rule to use the price equation you just created in step 3. This nested price rule will mark down all the catalog entry prices in the **Brake Components** category.

\_\_\_\_a. Select Create new > Price Rule.

9	ement Center Tools 🔹	
File Edit Vie	ew Help	
	27 🖻 日 🕲 🔵	01
	Catalog Filter	Price
🔍 Search 🎬 Compa	😹 Catalog Filter Upload	FILCE
Compa	🚉 External Price Rule	
🚞 Cataloç	🏦 Price List	_( <b>v</b> )
🚞 Cataloç	🚑 Price List Upload	
🚞 Price R 🔪	Price Equation Perceptage Constant	
🦲 Price Li	🚯 Percentage Constant	
🧎 Price Li	🔓 Currency Constant	
📄 Price Cor	nstants	

#### \_\_\_\_b. Complete the **Name** field shown in the screen capture below.

🐴 *Di	scount for Brake			Save and Close	Close
E Actions Ĉa Ĉa Ĉa Ĉâ	Image: Constraint of the second se		•		
Conditions	*Name	Discount for Brake			
	Description				
🖻 Branching					

\_\_\_\_c. Drag the **Condition Branch** 😌 element into the price rule path. Two paths will be created

immediately after you drop the **Condition Branch**. Click the condition branch icon <sup>(C)</sup> and complete the fields shown in the screen capture below.

*Di	scount for Brake	Save and Close	Close	)
Actions	Condition Branch First path for which a condition is met			
<ul> <li>Conditions</li> <li>Conditions</li> <li>Conditions</li> </ul>	Condition Branch Name Catalog condition branch Branch type () First path for which a condition is met () () () () () () () () () () () () () (			
Branching	otherwise 1 of 2 selected			-

- \_\_\_\_\_ d. Drag the **Catalog Condition** element from the palette's **Conditions** group into the **Brake** path.

  - 2) In the Catalog Condition property view, select Specific categories for Condition Scope.
  - 3) Select That are in the following categories for Target catalog entries.
  - 4) Type **Brakes** and click **Find and Add** button to add **Brakes** category into the **Categories** table.

*Dis	scount for Brake	Save and Close	Close			
E Actions Constant Cons	Condition Branch First path for which a condition is met U D Brake Catalog Condition Categories are: Brakes U D D D D D D D D D D D D D D D D D D					
	Catalog Condition Condition scope (i) Specific categories					
🖃 Conditions	Target catalog entries    That are in the following categories					
24	Brakes Find and Add 🐑 🛍 🛐 *Categories 🖲 * Type * Name Description					
ê &						
🖯 Branching	Brakes Brakes components					
<ul><li></li></ul>	0 of 1 selected		•			

\_\_\_\_\_e. Drag the **Calculate price** element is from the palette **Actions** group and drop it after the **Catalog Condition** element.

1) Click the **Calculate price** icon in the price rule builder.

- 2) In the Calculate price element property view, select **Use an existing price equation** option.
- 3) Type VIP\* and click Find and Add button to add VIPDiscountEquation into the Price equation table.

🛕 *Di	scount for Brake			Save and Close	Close
Actions	Condition Bran First path for which a conditio is met		Catalog Condition Categories are: Brakes	Calculate Price Use price equation: VIPDiscountEqu ation	
	Calculate Price				
Conditions	Options () (	🔵 Mark down pi			
		VIP*	Find and Add 👘 🛃		
<b>&amp; &amp;</b>	*Price equation 🛈	* Туре	Name	Description	
Branching		0 of 1 selected	VIPDiscountEquation		
I 😔 🚯					

- \_\_\_\_f. Click **Save and Close** button to save your price rule.
- \_\_\_\_\_5. Create a price rule org-1-price-rule. This price rule will be used to an organization's contract.
  - \_\_\_\_a. Select Create new > Price Rule.
  - \_\_\_\_b. In the Name field, type in org-1-price-rule.

*org	-1-price-rule	Save and Close	Close
Actions	•		
	O Price Rule General Properties		
Conditions	*Name org-1-price-rule		
<ul><li>□ Branching</li><li>○ </li></ul>			

- \_\_\_\_ c. Drag the **Get Price from Price List** element <sup>[]</sup> from the palette's Actions group and drop it into the price rule path.
  - 1) Click the **Get Price from Price List** element icon in the price rule builder.
  - 2) Type <Elite\_Store\_identifier> and click **Find and Add** button to add store's default Offer Price list into the table.

*on	g-1-price-rule			Save and Close Close
Carlons	Get Price from Price list is: Elite		•	
	Get Price from	Price List	Find and Add 🗐 🛃	
	*Price list 🕕	* Туре	Name	Description
Conditions		Ê	Elite-FEP	This is the default Offer Price list for th store. This price list contains offer price for all catalog entries in the master catalog. The offer price is the actual pr customers must pay, before taxes, discounts, and shipping.
		0 of 1 selected		
Branching	4			
🔄 🔿				
				•

- \_\_\_\_\_d. Drag the **Apply Nested Price Rule** element from the palette's Actions group into the price rule path.
  - 1) Click the **Apply Nested Price Rule** element icon 🔛 in the price rule builder.
  - 2) Type **Discount\*** and click **Find and Add** button to add **Discount for Brake** price rule into the table.

*or	g-1-price-rule			Save and Close	Close
Actions  C Actions  C Get Price from Price list is: Elit					
	Apply Nested	Price Rule			
Conditions		Discount*	Find and Add 😵 🛃		
	*Price rule 🕕	Name	Туре	Description	
1 100 100		Discount for Brake	e Dependent		
<u>a</u>		0 of 1 selected			
🖃 Branching					
۲					
	•				•

- \_\_\_\_e. Click **Save and Close** button to save the price rule.
- 6. Repeat the Step 5 to create another price rule **org-2-price-rule**. This price rule will be assigned to another organization's contract. Except the Step 5 b, where you need to use **org-2-price-rule** as the price rule name, all other steps are exactly same.

## Part 2: Register organizations from Elite storefront

In this part of the lab, you will register two organizations from the storefront. You will then go to the Organization Administration Console to approve the registrations.

- 1. Register two organizations from storefront.
  - \_\_\_\_a. Launch the Elite starter store.
  - \_\_\_\_\_b. Select **Register Organization** to register two organizations using the parameters listed in the table below. For your convenience, type the administrator's passwords you used for the registrations into the table.

ELITE		
	Sign In or create a new Elite B2B account profile.	New Customer           If you are a new customer, dick on the Register User button to register with a registered organization.           Register User           If you are a new customer and your organization is not registered, dick Register Organization below.           Register Organization

Organization Name	Administrator ID	Password
org-1	org-1-admin	
org-2	org-2-admin	

- \_\_\_\_2. Approve the **org-1** and **org-2** registrations from Organization Administration console.
  - \_\_\_\_a. Open the WebSphere Commerce Organization Administration Console by following the instruction in the URL.

http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.admin.doc/tasks/ttfbsopb.htm/publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com/infocenter/wchelp/v7r0m0/topic/com/infocenter/wchelp/v7r0m0/topic/com/infocenter/wchelp/v7r0m0/topic/com/infocenter/

- \_\_\_\_b. Log on to the Organization Administration Console with your site administrator ID and password.
- \_\_\_\_ c. Select Approvals > Approval Requests.

Organization Administration Console									
Access Management	Approvals	Help							
Logout > Home	Approval	Approval Requests							
	Find Approval Requests								

\_\_\_\_\_d. Select the organizations you just registered and select the **Approve** button.

Organization Administration Console			
Access Management Approvals Help			
Logout > Home > Approval Requests			
Approval Requests View Pending 💌 Number of items: 2		Page Number 1 G « First 1 of 1 Last	
D ID Submitter Process	↑ Status	Submitted On	Approve
☑ 10001 org-1-admin Organization Registration	Pending	September 14, 2010 4:04:43 PM	Reject
10003 org-2-admin Organization Registration	Pending	September 14, 2010 4:40:16 PM	Summary
			Find

- \_\_\_\_e. Type in some words for the **Remarks**. Click OK.
- \_\_\_\_f. Log out the Organization Administration console.

## Part 3: Create a contract for each of the organizations

In this part of the lab, you will use the WebSphere Commerce Accelerator to create a contract for each of the organizations you registered in the part 2.

\_\_\_\_1. Create a business account for organization **org-1**.

Note: Steps described here are for this lab only. If you want to know more information about how to create account, you can refer following document:

http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.user.business.doc/tasks/tctacnew.htm

\_\_\_\_a. Open the WebSphere Commerce Accelerator by following the instruction in the URL:

http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.user.doc/tasks/ttfopen.htm

- \_\_\_\_b. Log on to the Accelerator with your site administrator ID and password.
- \_\_\_ c. Select store <Elite\_Store\_identifier>
- \_\_\_\_\_d. Select Sales > Accounts menu.

Sele	ct 🕨	Elite-FEP fulfillment center - Elite-FEP - United States English							
Store	Sales	Marketing	Products	Auctions	Logistics	Payments	Help		
Logout >	Acc	ounts							
	REQ	s							

\_\_\_\_e. On the right side you can see a list of buttons. Click the first **New** button on the top to open the new Account notebook.

Store	Sales	Marketin	g Products	Auctions	Logistics	Payments	Help	
Logout :	> Home > A	Accounts >	New Account					
								OK Cancel
Invoicin Credit L	entative e Order g ine t and Billir ing		Account Cu: Customer orga Total custome Select organiz: org-1 org-1 org-2	nization (re r organizatio			2 Search for organizations Match case, beginning with 💌 Find Customer Organization	
			Contact org-1-admin	·				

\_\_\_\_f. In Customer page, select org-1 organization. In the Contact drop down list, select org-1-admin.

\_\_\_\_ g. On the bottom of the **Customer** page, select "**Customers can purchase under the terms and** conditions of store's default contract".

Contact information	
Customers can purchase under the terms and conditions of store's default con	tract

\_\_\_\_h. You can skip all other page settings in the **Account** notebook for this lab. Click **OK** to save the business account and close the notebook.

- 2. Repeat the Step 1 to create another business account for organization **org-2**. When you repeat the step f, you need to select org-2 and org-2-admin.
- 3. Create a new contract for organization org-1.

\_\_\_\_a. In Account List page, select **org-1**. and then click **New Contract** button.

Store	e Sales	Marketing	Products	Auctions	Logistics	Payments	Help	
Logou	ut > Home :	<ul> <li>Accounts</li> </ul>						
	ounts ber of iten	ns: <b>4</b>					Page Number 1 G 44 First 1 of 1  Last	
	Customer			Represe	entative		Number of Contracts	New
	Buyer A Oro	anization		Elite Org	Elite Organization		1	Change
	<u>Buyer B Orc</u>	anization		Elite Org	anization		1	New Contract
	org-1			Elite Org	anization		<u>0</u>	Contracts
	orq-2			Elite Org	anization		<u>0</u>	Orders

\_\_\_\_b. In the General page, complete the fields shown in the screen capture blow.

Store Sales Marketi	ng Products	Auctions	Logistics	Payments	Help
Logout > Home > Accounts :	> Contracts > New	Contract			
General	Contract Ge	onoral Inf	ormation		
Participants	Contract Ge		ormation		
Catalog Filter	Contract name				
⊡ Shipping	org-1-contrac	t			
Payment and Billing	Short descripti	ion (required	)		
⊡-Returns	org-1 contrac				
Order Approval					
Attachments	Description				
Remarks					
Extended TC					<b>_</b>
	1				
	🗹 Starts imm	ediately			
	🔽 No expiry o	late			
	Refer to contra Do not refer t		t <b>•</b>		

\_\_\_\_ c. Select **Participants** link on the left side. In the Available organizations field, select **org-1** and then click **<< Add** button to add **org-1** into **Selected organization** field.

Store Sales M	arketing Products	Auctions	Logistics P	ayments	Help	
Logout > Home > Acc	ounts > Contracts > New	Contract				
						OK Cancel
General Participants	Contract Pa	articipants				
Catalog Filter	Selected orga	nizations				Available organizations
⊕-Shipping						orq-1
Payment and Billing						
⊕ Returns					< Add	
Order Approval					>> Remove	
Attachments						
Remarks						
Extended TC						
	Selected mem	nber groups				Available member groups
					∶< Add	
					>> Remove	

\_\_d. Select Catalog Filter link on the left side. Right click <Elite\_Store\_identifier> and select include to include all the categories.

The Feature Pack 2 supports both old Catalog Filter created in Accelerator and the new Catalog Filter created in the Management Center. To make this lab simple, you will use the old catalog filter for this lab.

Store	Sales	Mark	eting	Product	s Auctio	ns Logistics
Logout >	Home >	Account	ts > New	Contract		
General			Catal	og Filte	er	
Participa	nts			5		
Catalog	Filter					
🕀 - Shippi	ng					
Payment	and Billi	ng		lite-FEP		
₽nReturn	IS		⊡ <b>_</b>	Brake	Include	
Order Ap	proval		÷	Electr Enterla		ith Adjustment
Attachm	ents		÷	Suspe	Expand	
Remarks			÷	Trans	Collapse	
Extended	д тс					

\_ e. On the left side, expand Shipping and select Provider link. Select all the shipping providers in the Available shipping providers field. Click << Add button to add them into the Selected shipping providers.

Logout > Home > Accoun	ts > Contracts > Change Contract		
			ок
General	Chinning Dravidara		
Participants	Shipping Providers		
Catalog Filter	Selected shipping providers	-	Available shipping providers
			Shipping policy for A1 Shipping policy for A2
Providers			Shipping policy for A3
Charge Type		< Add	
Addresses			
- Adjustments		>> Remove	
Payment and Billing			
⊡⊡Returns			
Order Approval			I

# \_\_\_\_f. Select Charge Type under the Shipping. Select Shipping charged by seller in the Available shipping charge types, click << Add to add it to the left.

Logout > Home > Account	s > Contracts > Change Contract		
			ок
General	Chipping Charge Type		
Participants	Shipping Charge Type		
Catalog Filter	Selected shipping charge types	_	Available shipping charge types
			Shipping charged by carrier Shipping charged by seller
Providers			
Charge Type		< Add	
Addresses		>> Remove	
Adjustments		22 Norman Sector	
Payment and Billing			
🖽 Returns			
Order Approval			1

#### \_\_\_\_g. Select Extended TC link on the left side, In the Price Rule tab, select org-1-price-rule.

Store Sales	Marketing	Products	Auctions	Logistics	Paymer	nts Help					
Logout > Home >	Accounts > Ne	w Contract									
								ок	Cancel		
General	F	vtondod T	orme and	l Conditio	ne						
Participants		Extended Terms and Conditions									
Catalog Filter	Catalog Filter Price Rule										
⊡Shipping		Catalog II									
Payment and Billi							e rule you specify in the Pro	perty Value colum	nn is used to		
⊕-Returns	S	et prices for	catalog ent	ries on the s	torefront						
Order Approval		Property Nan	ne Prop	erty Value		Data Type	Property Description				
Attachments		Price Rule	No	price rule	•	String	The name of the price rule to	o assign to this contr	act.		
Remarks				orice rule							
Extended TC				price rule er price rule							
				-1-price-rule							

- \_\_\_\_h. You can skip the settings for other pages for this lab. Click **OK** to close the new contract notebook. You will be forwarded to the **Accounts** page.
- \_\_\_\_\_i. Select org-1, and then click Contracts button on the right side to go to contract list view page

Store	e Sa	ales	Marketing	Products	Auctions	Logistics	Payments	Help	
Logou	ut > Ho	ome >	Accounts						
	ount ber of		:: 4					Page Number 1 ** First 1 of 1 1	Go .ast »
	Custor	mer			Represe	entative		Number of Contracts	New
	Buγer /	A Orga	nization		Elite Org	anization		1	Change
	Buyer B	<u>B Orga</u>	nization		Elite Org	anization		1	New Contract
	orq-1				Elite Org	anization		1	Contracts
	org-2				Elite Org	anization		<u>0</u>	Orders

\_\_\_ j. In the Contracts list page, select org-1-contract, click Submit button on the right to activate this contract

Store Sales	Marketing	Products	Auctions	Logistics	Payments	Help			
Logout > Home >	Accounts > Cor	ntracts							
Contracts View All Number of items	<b>▼</b> :: 1						Page Number " First  1 of	1 Go 1 Last »	
Name	Short D	escription	1 Start		End	📩 Statu	is 🔷 Created 🔷 🕇	Locked	New
org-1-contrac	t org-1 co	ntract	Starts in	imediately	No expiry dat	e Draft	9/17/10 8:10 AM	No	Import
									New Version
									Change
									Submit

\_\_\_\_k. Click the Refresh button on the right, make sure you see the org-1-contract status is "Active"

Logout > Home > Acco	unts > Contracts					
Contracts View All Number of items: 1	V			F	Page Number 🛛 🖓 🖓 Page Number	1 Go 1 Last »
Name	Short Description	1 Start	End	🕈 Status 📩	Created	Locked
🗖 org-1-contract	org-1 contract	Starts immediately	No expiry date	Active	9/17/10 8:10 AM	No

- 4. Repeat the Step 3 to create another contract org-2-contract for organization org-2.
- 5. Log out of Accelerator.

## Part 4: Verify the price rules

In this part of the lab, you will go to the storefront to view product prices in **Brake Components** category to verify the prices from price rule are correct.

- \_\_\_\_\_1. Launch the Elite starter store.
- 2. View prices for contract **org-1 contacts**.
  - \_\_\_\_a. Log on to the store using ID **org-1-admin**. After you log in, you should see **My Account Summary** page. You can click **My Account** link in the header if you are not on that page.
  - \_\_\_\_b. In the **Organizations** section, select contract **org-1 contract**, and then click **Submit Contracts** button.

Organizations					
Current Organization	org-1				
Contract					
🗹 org-1 contract					
Contract 1234					
Submit Contracts					

\_\_\_\_ c. Click Brakes link on the top to display Brakes category page. You can see all product prices in this category are marked down by 30%.

Featured Products			
Ceramic Brake Pads	Rebuilt Master Cylinder	Two-metal Master Cylinder	Snow tire
<del>\$42.50</del> \$ <b>29.75</b>	<del>\$75.00</del> \$ <b>52.50</b>	<del>\$150.00</del> \$ <b>105.00</b>	<del>\$100.00</del> \$ <b>70.00</b>
Add to Order	Add to Order	Add to Order	Add to Order

\_\_\_\_\_d. Click Add to Order button to add Snow tire into the shopping cart.

\_\_\_\_\_e. Click **Current order** link on the top of the store page. You can see in the **Current Order** page **Snow tire** price for contract **org-1-contract** is \$70.00 (The default price is \$100.00).

Current O	rder				
PRODUCT		AVAILABILITY	QTY	EACH	TOTAL
	Snow tire SKU: A0000556 Change Attributes Contract: org-1-contract	In-Stock	1	\$70.00	\$70.00
	X Remove				

- \_\_\_\_\_f. Log out from the store.
- 3. Repeat Step 2, but log on to the store with ID **org-2-admin**. Since both organizations' price rules use the same nested price rule, you should see the same results as you log on as **org-1-admin**.
- 4. You can go to the WebSphere Commerce Management Center to change the price constant **VIPDiscount** described in the Part 1 step 2, and then view the Brake category product prices from the storefront. You can see how easy it is to use price constant and price equation to change prices for multiple contracts.

## Part 5: What you did in this exercise

In this tutorial you have learned how to use the price constant, price equation in multiple price rules to set and change the product prices in contracts.

You should now understand how to complete the following tasks:

- Create price constant
- Create price equation
- Create multiple paths in the price rule by using the price rule condition
- Use the nested rule
- Assign the price rules to B2B store's contracts