

IBM WebSphere Commerce



# Sample Store Guide

*Version 5.5*



IBM WebSphere Commerce



# Sample Store Guide

*Version 5.5*

**Note:**

Before using this information and the product it supports, be sure to read the general information under "Notices," on page 249.

**First Edition (June 2003)**

This edition applies to the following products:

- IBM WebSphere Commerce Business Edition, Version 5.5
- IBM WebSphere Commerce Professional Edition, Version 5.5
- IBM WebSphere Commerce - Express, Version 5.5

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## About this book

The IBM® WebSphere® Commerce Sample Store Guide provides information about the WebSphere Commerce sample stores that accompany WebSphere Commerce. In particular, it provides details on the following topics:

- Business models and the samples
- Sample store or site conventions
- Overview, setup, and features information
- Tutorials and use cases

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## Conventions and terminology used in this book

This book uses the following highlighting conventions:

<b>Boldface type</b>	Indicates commands or graphical user interface (GUI) controls such as names of fields, icons, or menu choices.
Monospace type	Indicates examples of text you enter exactly as shown, file names, and directory paths and names.
<i>Italic type</i>	Used to emphasize words. Italics also indicate names for which you must substitute the appropriate values for your system.



This icon marks a Tip - additional information that can help you complete a task.

---

### Important

These sections highlight especially important information.

### Note

These sections highlight significant information.



Business

Indicates information specific to WebSphere Commerce Business Edition.



Professional

Indicates information specific to WebSphere Commerce Professional Edition.



Express

Indicates information specific to WebSphere Commerce - Express Edition.










Developer

Indicates information specific to the WebSphere Commerce development environment.

For WebSphere Commerce Business Edition and WebSphere Commerce Professional Edition, your development environment is WebSphere Commerce Studio, Version 5.5.

For WebSphere Commerce - Express, the development environment is WebSphere Commerce - Developer Edition, Version 5.5.

	Indicates information specific to programs running on AIX®.
	Indicates information specific to programs running on OS/400®.
	Indicates information specific to programs running on Linux for xSeries, Linux for eServer zSeries and S/390, Linux for eServer iSeries and Linux for eServer pSeries.
	Indicates information specific to programs running on Solaris Operating Environment.
	Indicates information specific to programs running on Windows® 2000.
	Indicates information specific to DB2 Universal Database™.
	Indicates information specific to Oracle9i Database.






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## Path variables

This guide uses the following variables to represent directory paths:

### *WC\_installdir*

This is the installation directory for WebSphere Commerce. The following are the default installation directories for WebSphere Commerce on various operating systems:

	/usr/WebSphere/CommerceServer55
	/QIBM/ProdData/CommerceServer55
	/opt/WebSphere/CommerceServer55
	/opt/WebSphere/CommerceServer55
	C:\Program Files\WebSphere\CommerceServer55


### *WC\_userdir*

This is the directory for all the data that is used by WebSphere Commerce which can be modified or needs to be configured by a user. An example of such data is WebSphere Commerce instance information. This directory is unique to OS/400.

The *WC\_userdir* variable represents the following directory:  
/QIBM/UserData/CommerceServer55

### *WAS\_installdir*

This is the installation directory for WebSphere Application Server. The following are the default installation directories for WebSphere Application Server on various operating systems:

	/usr/WebSphere/AppServer
---	--------------------------

▶ 400	/QIBM/ProdData/WebAS5
▶ Linux	/opt/WebSphere/AppServer
▶ Solaris	/opt/WebSphere/AppServer
▶ Windows	C:\Program Files\WebSphere\AppServer

▶ 400 *WAS\_userdir*  
 It represents the following directory:  
 /QIBM/UserData/WebAS5/Base/WAS\_instancename

▶ Developer *workspace\_dir*  
 The directory for the WebSphere Commerce development workspace. The default workspace directory is: WebSphere\workspace

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## Where to find new information

This book may be updated in the future. Check the following WebSphere Commerce Web site for updates:

[www.ibm.com/software/webservers/library.html](http://www.ibm.com/software/webservers/library.html)

Updates may include new information.



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## Part 1. Overview of WebSphere Commerce samples

IBM WebSphere Commerce provides you with several samples on which you can base your own business (store or site). Each sample represents a business model; a concept which provides the organizational structure, roles to be assigned for the organization, access control policies and policy groups, and predefined stores that are targeted at a specific e-commerce solution.

The samples are built to represent direct sales, value chain (demand chain and supply chain), and hosting scenarios. The business models represented in the WebSphere Commerce samples are:

- Consumer direct
- B2B direct
- Demand chain
- Supply chain
- Hosting

Each sample is designed to exploit the features found in today's top business sites. The sample stores provided with WebSphere Commerce are the following:

- FashionFlow, an online consumer direct fashion store.
- MiniFashion, a scaled down online consumer direct store.
-  Business ToolTech, an online B2B direct hardware supply store.
-  Business Commerce Plaza, an online demand chain reseller computer store.
-  Business Commerce Hosting Hub, an online hosting store.
-  Business Commerce Supplier Hub, an online supply chain store.
-  Express Express Store, an online consumer direct and B2B direct store.

**Note:** The Express Store is documented in the *WebSphere Commerce - Express Easy Start Guide*.

For information on the Direct Sales models and the associated store archives, see Part 3, "Consumer direct sample (FashionFlow)," on page 17 and Part 4, "B2B direct sample (ToolTech)," on page 109.

For information on the Value Chain (both Demand Chain and Supply Chain) models and the associated store archives, see Part 5, "Demand chain sample (Commerce Plaza)," on page 149 and Part 6, "Supply chain sample (Commerce Supplier Hub)," on page 179.

For information on the Hosting model and the associated store archives, see Part 7, "Hosting sample (Commerce Hosting Hub)," on page 207.





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## Chapter 1. Samples packaged with WebSphere Commerce

IBM WebSphere Commerce provides you with several samples on which you can base your own business (store or site). Each sample represents a business model; a concept which provides the organizational structure, roles to be assigned for the organization, access control policies and policy groups, and predefined stores that are targeted at a specific e-commerce solution. The model should be used at the development stage, acting as a typical implementation example of a solution. You would use this model as your base, and then add, delete, or change the content to suit your needs and reflect your business.

The samples are meant to shorten the time, compared to previous releases, from installing WebSphere Commerce to going live with your site. This is achieved by not only providing commands and JSP files but also the appropriate organization layout, approval configuration, and subscription to the appropriate access control policy groups for particular business scenarios. The samples are built to represent direct sales, value chain (demand chain and supply chain), and hosting scenarios. The business models represented in the WebSphere Commerce samples are:

- Consumer direct
- B2B direct
- Demand chain
- Supply chain
- Hosting

Within each business model is a composite store archive that contains all the assets of the WebSphere Commerce business models. Within this store archive are the samples. Since each sample store is packaged with WebSphere Commerce as a store archive, no further installation is necessary. In order to create a running store, you must publish one of the composite store archives. You can also publish a sequence of component store archives to publish a running store. Stores are published from the Administration Console; only Site Administrators can publish a store archive by selecting Site, and from the Store Archives menu, selecting Publish. The Store Archives page then displays listing the store archives available for publish. By default, the page showing composite store archives displays. For more information on publishing a store archive, see the WebSphere Commerce online help publishing information.

Each sample is designed to exploit the features found in today's top business sites. The sample stores provided with WebSphere Commerce are the following:

- FashionFlow, an online consumer direct fashion store.
- MiniFashion, an online consumer direct store.
- ToolTech, an online B2B direct hardware supply store.
- Commerce Plaza, an online demand chain reseller computer store.
- Commerce Hosting Hub, an online hosting store.
- Commerce Supplier Hub, an online supply chain store.

For more detailed information on the business models supported by WebSphere Commerce, and information on store development, see the *IBM WebSphere Commerce Store Development Guide*.

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## Sample store archive access control

Each business model has a composite store archive file (SAR) associated with it. A store archive file is a compressed file that contains all of the assets necessary to create a site or store. Once you publish a store archive, you have a functional site or store that you can view, browse, or shop.

You have the option of publishing the composite archive, which has all the assets of the smaller store archives, or of publishing individual or component store archives, which have fewer assets. A composite store archive contains all the necessary assets to create a working site. It contains the organization structure, predefined user roles, access control policies, and policy groups for the corresponding business model. In addition to necessary security assets, it also contains non-security assets, such as business processes and JSP files. You could publish a component store archive if you did not want everything included with the composite, perhaps because an aspect of it is not appropriate for your store.

When a store archive is published, an organization structure is created, with organization and organization units; store specific access policies and policy groups; subscription to policy groups; assignment of roles to organizations; assignment of approvals to organizations.

### Roles and the MemberRegistrationAttributes XML file

After an instance is created, and the store archive is published, some roles are dynamically created when a user or organization registers (also known as *self-registration*). Users can self-register using the commands: BuyerRegistrationAdd, ResellerRegistrationAdd, UserRegistrationUpdate, and UserRegistrationAdd. As part of the registration process, roles are automatically assigned based on the type of registration, the organization under which the user is created, and the store to which the new user is registering. The specific roles to be assigned are configurable using the MemberRegistrationAttributes.xml file.

The UserRoles section contains User nodes. The role assignment algorithm iterates through the list of User nodes, and returns the first one that matches. This process is based on the following:

- The registrationType (for example, userRegistration, ResellerRegistration, BuyerRegistration).
- The memberAncestor (the organizations and organizational units that make up the user's ancestor tree).
- The store ancestor (the organizations and organizational units that make up the ancestor tree of the store to which the user is registering). For each user ancestor, the file looks for User nodes that match the registrationType and storeAncestor, and returns the first group from each ancestor that matches.

When a role group is found that matches the outer criteria, WebSphere Commerce attempts to assign the roles in the group to the user or organization. An example of a user role name is Registered Customer.

The OrganizationRoles section is very similar to the user roles section, except that this is where the roles for new organizations are defined. The main difference is that the roles listed within the role groups for organizations are defined by name only; that is, once WebSphere Commerce locates a matching role group, it simply creates all roles defined in the list. An example of an organization role group is Reseller Registration, which contains a number of roles, such as Seller, Seller Administrator, and Registered Customer.

For an explanation of this file, and detailed information on how roles are created, see the WebSphere Commerce online help.

For information on which roles are created dynamically for each sample, see the appropriate sample store's chapter.



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## Part 2. Sample store conventions

The sample stores provided with WebSphere Commerce follow similar conventions, such as:

- Location and directory structure
- JavaServer Pages naming conventions
- Property files naming conventions



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## Chapter 2. Sample store conventions

All of the store samples packaged with WebSphere Commerce follow similar conventions, such as the location and directory structure of the samples, the JavaServer Pages naming conventions, or the properties files' naming conventions.

---

### Location and directory structure of samples

The location and directory structures are shown with two different paths so that you can see where things might be located in either a development or product environment. The development path has the variable *workspace\_dir* and the production path has the variable *WAS\_installdir*.

#### Consumer direct — FashionFlow

Table 1. FashionFlow

Store	JSP location	Property files location
FashionFlow	<b>Developer</b> <i>workspace_dir</i> /Stores /Web Content/FashionFlow <i>WAS_installdir</i> /installedApps/ <i>nodename</i> /WC_ <i>instancename</i> .ear /Stores.war/FashionFlow	<b>Developer</b> <i>workspace_dir</i> /Stores /Web Content/WEB-INF/classes /FashionFlow/ <i>WAS_installdir</i> /installedApps/ <i>nodename</i> /WC_ <i>instancename</i> .ear/Stores.war/ WEB-INF/classes/FashionFlow

In addition to the JSP files and Property files, there are some other files used to change the flow of your pages, the style of your store or site, and the preview pages to get a preview of the changes before you go into production.

To change the flow, or to enable and disable certain store features, the **Change Flow files** are in :

**Developer** *workspace\_dir*/Stores/Web Content/WEB-INF/xml/tools/stores/FashionFlow/  
*WAS\_installdir*/installedApps/*nodename*  
/WC\_*instancename*.ear/Stores.war/  
WEB-INF/xml/tools/stores/FashionFlow/

To change the style of your store or site, the **Store 'Style Editor' thumbnails** are in:

**Developer** *workspace\_dir*/Stores/Web Content/tools/stores/FashionFlow/style  
*WAS\_installdir*/installedApps/*nodename*  
/WC\_*instancename*.ear/Stores.war/  
tools/stores/FashionFlow/style

To preview the changed pages, the **'Change Pages' preview pages** are in:

**Developer** *workspace\_dir*/Stores/Web Content/tools/stores/FashionFlow/text  
*WAS\_installdir*/installedApps/*nodename*/WC\_*instancename*.ear  
/Stores.war/tools/stores/FashionFlow/text

## Consumer direct — MiniFashion

Table 2. MiniFashion

Store	JSP location	Property files location
MiniFashion	<a href="#">Developer</a> <code>workspace_dir/Stores/</code> <code>/Web Content/ConsumerBasic</code> <code>WAS_installdir/installedApps/</code> <code>nodename</code> <code>/WC_instancename.ear</code> <code>/Stores.war/</code> <code>ConsumerBasic</code>	N/A

## B2B direct — ToolTech

Business

Table 3. ToolTech

Store	JSP location	Property files location
ToolTech	<a href="#">Developer</a> <code>workspace_dir/Stores/</code> <code>/Web Content/ToolTech</code> <code>WAS_installdir/installedApps/</code> <code>nodename</code> <code>/WC_instancename.ear</code> <code>/Stores.war/ToolTech</code>	<a href="#">Developer</a> <code>workspace_dir/Stores/</code> <code>/Web Content/WEB-INF/classes</code> <code>/ToolTech</code> <code>WAS_installdir/installedApps/</code> <code>nodename</code> <code>/WC_instancename.ear</code> <code>/Stores.war/WEB-INF/classes/</code> <code>ToolTech</code>

To change the flow, or to enable and disable certain store features, the **Change Flow files**:

[Developer](#) `workspace_dir/Stores/Web Content/WEB-INF/xml/tools/stores/ToolTech`  
`WAS_installdir/installedApps/nodename/WC_instancename.ear/Stores.war/`  
`WEB-INF/xml/tools/stores/ToolTech`

## Demand chain — Commerce Plaza

Business

Table 4. Commerce Plaza

Store	JSP location	Property files location
Commerce Plaza	<a href="#">Developer</a> <code>workspace_dir/Stores/</code> <code>/Web</code> <code>Content/CommercePlaza</code> <code>WAS_installdir/installedApps/</code> <code>nodename</code> <code>/WC_instancename.ear</code> <code>/Stores.war/CommercePlaza</code>	<a href="#">Developer</a> <code>workspace_dir/Stores/</code> <code>/Web Content/WEB-</code> <code>INF/classes/CommercePlaza</code> <code>WAS_installdir/installedApps/</code> <code>nodename</code> <code>/WC_instancename.ear/Stores.war/</code> <code>WEB-INF/classes/CommercePlaza</code>



Table 4. Commerce Plaza (continued)

ConsumerDirect ResellerProfile store	<b>Developer</b> <code>workspace_dir/Stores/</code> <code>/Web Content</code> <code>/ConsumerDirectResellerProfile</code> <code>WAS_installdir/installedApps/</code> <code>nodename</code> <code>/WC_instancename.ear</code> <code>/Stores.war/</code> <code>ConsumerDirectResellerProfile</code>	<b>Developer</b> <code>workspace_dir/Stores</code> <code>/Web Content/WEB-INF</code> <code>/xml/tools/stores</code> <code>/ConsumerDirectResellerProfile</code> <code>WAS_installdir/installedApps/</code> <code>nodename</code> <code>/WC_instancename.ear/Stores.war/</code> <code>WEB-INF/classes</code> <code>/ConsumerDirectResellerProfile</code>
Catalog Asset store	<b>Developer</b> <code>workspace_dir/Stores</code> <code>/Web Content</code> <code>/CommercePlazaCatalog</code> <code>WAS_installdir/installedApps</code> <code>/nodename/WC_instancename.ear</code> <code>/Stores.war/</code> <code>CommercePlazaCatalog</code>	N/A

In addition to the JSP files and Property files, there are some other files used to change the flow of your pages, the style of your store or site, and the preview pages to get a preview of the changes before you go live.

To change the flow, or to enable and disable certain store features, the **Change Flow files**:

**Developer** `workspace_dir/Stores/`  
`Web Content/WEB-INF/xml/tools/stores/ConsumerDirectResellerProfile`  
`WAS_installdir/installedApps/nodename/WC_instancename.ear`  
`/Stores.war/WEB-INF/xml/tools/stores/ConsumerDirectResellerProfile`

To change the style of your store or site, the **Store 'Style Editor' thumbnails** are in:

**Developer** `workspace_dir/Stores/`  
`Web Content/tools/stores/ConsumerDirectResellerProfile/style`  
`WAS_installdir/installedApps/nodename/WC_instancename.ear`  
`/Stores.war/tools/stores/ConsumerDirectResellerProfile/style`

To preview the changed pages, the **'Change Pages' preview pages** are in:

**Developer** `workspace_dir/Stores/`  
`Web Content/tools/stores/ConsumerDirectResellerProfile/text`  
`WAS_installdir/installedApps/nodename/WC_instancename.ear`  
`/Stores.war/tools/stores/ConsumerDirectResellerProfile/text`

## Demand chain — Hosted Stores

**Business**

**Hosted stores:** Note that there is no default directory name for the hosted stores. You can choose your own name for this. For these purposes, it will be called *hosted\_store*. When a hosted store is created, it shares all resources with the ConsumerDirectResellerProfile store and has no assets for itself. When the store is customized, some files are created and put into the following directories:

Table 5. Demand chain — hosted stores

Images	Change Flow files	Property files location
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Table 5. Demand chain — hosted stores (continued)

<p>▶ Developer workspace_dir /Stores/Web Content/hosted_store WAS_installdir /installedApps/nodename /WC_instancename.ear /Stores.war/ hosted_store</p>	<p>▶ Developer workspace_dir /Stores /Web Content/WEB-INF/xml/tools /stores/hosted_store WAS_installdir/installedApps/nodename /WC_instancename.ear /Stores.war/ WEB-INF/xml/tools/stores /hosted_store</p>	<p>▶ Developer workspace_dir /Stores /Web Content/WEB-INF/classes /hosted_store WAS_installdir/installedApps/nodename /WC_instancename.ear /Stores.war/WEB-INF /classes/hosted_store</p>
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## Demand chain — Commerce Hosting Hub


▶ Business

Table 6. Commerce Hosting Hub

Store	JSP location	Property files location
Commerce Hosting Hub	<p>▶ Developer workspace_dir /Stores /Web Content/CommerceHostingHub WAS_installdir/installedApps/nodename /WC_instancename.ear /Stores.war/ CommerceHostingHub</p>	<p>▶ Developer workspace_dir /Stores /Web Content/WEB-INF/classes /CommerceHostingHub/ WAS_installdir/installedApps/nodename /WC_instancename.ear /Stores.war/ WEB-INF/classes /CommerceHostingHub</p>
Store Directory	<p>▶ Developer workspace_dir /Stores /Web Content/public WAS_installdir/installedApps/nodename /WC_instancename.ear /Stores.war/public</p>	<p>▶ Developer workspace_dir /Stores /Web Content/WEB-INF/classes /public/ WAS_installdir/installedApps/nodename /WC_instancename.ear /Stores.war/ WEB-INF/classes/public</p>
Catalog Asset Store	<p>▶ Developer workspace_dir /Stores /Web Content/ HostingCatalogAssetStore WAS_installdir/installedApps/nodename /WC_instancename.ear /Stores.war/ HostingCatalogAssetStore</p>	<p>▶ Developer workspace_dir /Stores /Web Content/WEB-INF/classes /HostingCatalogAssetStore/ WAS_installdir/installedApps/nodename /WC_instancename.ear /Stores.war/ WEB-INF/classes/ HostingCatalogAssetStore</p>
Hosted Store Front Asset Store	<p>▶ Developer workspace_dir /Stores /Web Content/ HostedStoreFrontAssetStore WAS_installdir/installedApps/nodename /WC_instancename.ear /Stores.war/ HostedStoreFrontAssetStore</p>	<p>▶ Developer workspace_dir /Stores /Web Content/WEB-INF/classes /HostedStoreFrontAssetStore/ WAS_installdir/installedApps/nodename /WC_instancename.ear /Stores.war/ WEB-INF/classes/ HostedStoreFrontAssetStore</p>

In addition to the JSP files and Property files, there are some other files used to change the flow of your pages, the style of your store or site, and the preview pages to get a preview of the changes before you go live.


To change the flow, or to enable and disable certain store features, the **Change**

**Flow files:**  `workspace_dir/Stores`  
`/Web Content/ WEB-INF/xml/tools/stores/HostedStoreFrontAssetStore`  
`WAS_installdir/installedApps/nodename/WC_instancename.ear/Stores.war/WEB-`  
`INF/xml/tools/stores/HostedStoreFrontAssetStore`

To change the style of your store or site, the **Store 'Style Editor' thumbnails** are in:

 `workspace_dir/Stores`  
`/Web Content/ /tools/stores/HostedStoreFrontAssetStore/style`  
`WAS_installdir/installedApps/nodename`  
`/WC_instancename.ear/Stores.war/tools/stores/HostedStoreFrontAssetStore/style`

To preview the changed pages, the **'Change Pages' preview pages** are in:

 `workspace_dir/Stores`  
`/Web Content/tools/stores/HostedStoreFrontAssetStore/text`  
`WAS_installdir/installedApps/nodename`  
`/WC_instancename.ear/Stores.war/tools/stores/HostedStoreFrontAssetStore/text`

The hosted stores behave the same as in the Demand Chain — Hosted Stores table.

## Supply chain — Commerce Supplier Hub



Table 7. Commerce Supplier Hub





Store	JSP location	Property file location	Catalog images location
Supplier Hub Store	 <code>workspace_dir</code> <code>/Stores/Web Content</code> <code>/SupplierMarketplace</code> <code>WAS_installdir</code> <code>/installedApps</code> <code>/nodename</code> <code>/WC_instancename.ear</code> <code>/Stores.war</code> <code>/SupplierMarketplace</code>	 <code>workspace_dir</code> <code>/Stores/Web</code> <code>Content/WEB-</code> <code>INF/classes</code> <code>/SupplierMarketplace/</code> <code>WAS_installdir</code> <code>/installedApps</code> <code>/nodename</code> <code>/WC_instancename.ear/</code> <code>Stores.war/WEB-INF</code> <code>/classes/</code> <code>SupplierMarketplace</code>	N/A
Catalog Asset Store	 <code>workspace_dir</code> <code>/Stores/Web</code> <code>Content/Catalog</code> <code>WAS_installdir</code> <code>/installedApps</code> <code>/nodename</code> <code>/WC_instancename.ear/</code> <code>Stores.war</code> <code>/SupplierMarketplace</code> <code>Catalog</code>	N/A	 <code>workspace_dir</code> <code>/Stores/Web Content/</code> <code>SupplierMarketplaceCatalog/</code> <code>images</code> <code>WAS_installdir</code> <code>/installedApps</code> <code>/nodename</code> <code>/WC_instancename.ear</code> <code>/Stores.war/</code> <code>SupplierMarketplaceCatalog/</code> <code>images</code>

Table 7. Commerce Supplier Hub (continued)

Supplier Asset Store	<p>▶ Developer workspace_dir</p> <p>/Stores/Web Content/SupplierProfileStore</p> <p>WAS_installdir</p> <p>/installedApps</p> <p>/nodename</p> <p>/WC_instancename.ear/Stores.war</p> <p>/SupplierProfileStore</p>	<p>▶ Developer workspace_dir</p> <p>/Stores/Web Content/WEB-INF/classes</p> <p>/SupplierProfileStore/WAS_installdir</p> <p>/installedApps</p> <p>/nodename</p> <p>/WC_instancename.ear/Stores.war/WEB-INF/classes/SupplierProfileStore</p>	N/A
Hosted Supplier Store	<p>▶ Developer workspace_dir</p> <p>/Stores/Web Content/store identifier</p> <p>WAS_installdir</p> <p>/installedApps</p> <p>/nodename</p> <p>/WC_instancename.ear/Stores.war</p> <p>/store identifier</p>	N/A	<p>▶ Developer workspace_dir/Stores</p> <p>/Web Content/store identifier/images/catalog</p> <p>WAS_installdir</p> <p>/installedApps</p> <p>/nodename</p> <p>/WC_instancename.ear/Stores.war</p> <p>/store identifier/images/catalog</p>

## Java Server Pages (JSP) naming conventions

There are certain conventions that should be followed, when possible, when creating JSP files.

The first letter should be in upper case, and use camel case style (for example CamelCase) for all JSP files. JSP file names begin with a noun. You may have an adjective in front of the noun, such as in AdvancedCatalogSearchForm.jsp. You do not necessarily need to repeat the section name that the JSP file belongs to; for example, AddressBookDisplay.jsp belongs to the Account section, but the JSP file does not need to have "Account" as part of the name. Avoid using short forms in the JSP name if possible, however, sometimes there are directory length considerations, and a short form cannot be avoided.

There are two types of JSPs:

1. Display JSP files

Display JSP files are used for presentation aspect of store pages. These contain HTML as well as JSP custom tags. These type of JSPs should contain no Java code, but may in some cases. These JSP files contain Java display logic but should not contain business logic.

2. Non-display or setup JSP files

Any JSP files which do not display information to the user fall under this category. These include preparing any data needed by the corresponding Display JSP, or the JSPs used for routing to different JSPs based on certain conditions. For example, EnvironmentSetup.jsp retrieves and prepares the JSP path, file path, and resource bundle, which are used by other JSP pages. An example of a JSP used for routing is AllocationCheckSetup.jsp. This JSP file includes different JSP files based on different conditions in the database. It shows the ProductAvailability page if only some items are available, and shows the OrderSummary page if all items are available or all items are unavailable.

Another example of a setup JSP file is `MultOrderProcessSetup`. This JSP file is used to execute the `OrderProcess` command multiple times in case the order is split. This enables the user enters payment information only once, which is used for both split orders. Even though it is not advisable to add business logic to the JSPs, there may be a need for writing such JSPs in case there is no command to do the existing task or to implement some user convenience.

The JSP name will usually be ended based on its type:

- A setup JSP will be ended with `Setup`. For example, `EnvironmentSetup.jsp`.
- A display JSP will be ended with `Form` or `Display`. It is possible that a display JSP contains an input form. As long as the main purpose of this page is for display, we will categorize that page as a display JSP. For example, although the sidebar contains a catalog search input, it is still considered as a display JSP. Examples are `AddressForm.jsp`, `SideBarDisplay.jsp`.
- An error JSP ends with `Error`, such as `QuickOrderBadSkuError.jsp`.
- An e-mail JSP will be ended with `Notify`, such as `PasswordResetNotify.jsp`.

Some JSPs are treated differently based on how they begin. For example, if a JSP begins with the word "Cached", that JSP is intended to be cached, and was created for that purpose. Sometimes a JSP is broken up so that it can be cached. Examples of cached JSP files are: `CachedSidebarDisplay.jsp`, and `CachedHeaderDisplay.jsp`.

## Variable naming conventions

**Variable names** should be as descriptive as possible. Lower case must be used to start a variable name, and Camel Case is also used. For example, `String storeId = request.getParameter("storeId");` the variable is named same as the URL parameter, which can be easily associated.

---

## JSP templates

Samples make use of a JSP template mechanism by maintaining a set of common files which implement a common set of functions. These files are included in most of the sample pages. This mechanism not only allows us to reflect changes easily, but also gives us a common look and feel for all the Sample Pages. What follows are some examples of "include" files:

- `index.jsp` - provides an entry point into each of the store. This JSP forwards the page to appropriate URL for store front. It can be different depending upon the store. For example, for the B2B direct sample, the command 'LogonForm' is the starting URL. Each of the commands used as a storefront has some required parameters, namely, `storeId`, `languageId` and sometimes 'catalogId'. Since the stores are created through store publish, the `storeId` or the `catalogId` is not known until after publishing has taken place. These are supplied to this JSP by the use of an "include" file, which gets updated by the store publish process. Note that `index.jsp` is not the include file, the include file is `parameters.jsp`. `<%@include file="include/parameters.jsp"%>` This supplies the parameter values needed by the enclosed command in the `index.jsp`.
- `HeaderDisplay.jsp` - Included at the top of the page. Contains common links to various pages, like Shopcart, MyAccount, Contact Us.
- `FooterDisplay.jsp` - Included at the bottom of the page. Contains common links at the bottom of the page which are similar to, or the same as the header.
- `SidebarDisplay.jsp` - Included after the `Header.jsp`. Contains choice of language.
- `EnvironmentSetup.jsp` - This JSP file includes access to the resource bundle, which contains the locale specific text for all the store pages. This allows us to

maintain a multilingual store while maintaining one set of JSP files. Since this JSP file is called by almost all JSP files in the store, the commonly needed attributes are retrieved here. For example, StoreDir, includeDir, fileDir and bundleDir, are retrieved here.

---

## Properties files

The name of the properties file should be: *StoreName\_locale.properties*. Stores that support multiple languages should have a default property file called *StoreName.properties*. If a string specified in a JSP file is not found in a locale specific property file, it will look in the default *StoreName.properties* file. For naming message keys within the property file, follow the convention below:

- There needs to be a section for each JSP file in the properties file. If this is the first time you are creating the text for the page, add a section for that page with the name of the page starting with '#', which means it is a comment.
- All the text strings used in that page should be contained in the properties file and are retrieved from the properties file using the resource bundle.
- All strings on the page should start with the same identifier which uniquely identifies the page.
- Text messages can be assembled dynamically and placeholders can be added into the properties file for the substitutions.
- The name of the message string should be descriptive instead of generic. For example, use logon\_userid, logon\_password instead of logon\_column1 or logon\_field1.

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## Assets

You can see the store data assets in the xml form in the store archive. For information on the sample assets, see the *IBM WebSphere Commerce Store Development Guide*.

---

## Troubleshooting: usage of logon ID within all stores

Within one instance of WebSphere Commerce, you cannot reuse the same logon ID. Ensure that it is unique per instance.

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## Part 3. Consumer direct sample (FashionFlow)

WebSphere Commerce provides you with a consumer direct sample. This part includes the following information:

- Consumer direct sample information
- FashionFlow overview and set up information
- FashionFlow use cases
- FashionFlow tutorials
- MiniFashion overview





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## Chapter 3. Consumer direct sample store archives

The consumer direct sample includes an online fashion store (FashionFlow), which supports direct selling to consumers. In the consumer direct business model, all of the stores are under the control of one seller, who sells his products to the general public.

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### Consumer direct store archives and access control

FashionFlow is the consumer direct online clothing store provided with WebSphere Commerce. FashionFlow implements many of the most commonly used features in today's top e-commerce sites.

What follows is a description of the organization and roles that are created in the three stages of setting up your sample: instance creation, SAR publish, dynamic entities.

#### Organization structure and instance creation

In order to allow customers or buyers to access your site, browse your catalog, and place orders; or to allow employees to administer the site, including updating the catalog, creating new promotions, or managing orders; or to allow resellers or other business partners to complete transactions on your site, all actors in your business scenario must be assigned a position in the WebSphere Commerce organization structure.

The WebSphere Commerce organization structure provides a framework for the actors, or entities, in your business scenario. This framework is organized in a hierarchical structure, which mimics typical organizational hierarchies with entries for organizations and organizational units and users. The organizations and organizational units in the framework act as owners for the parts of your business. All parts of your business, including customers, administrators, stores, catalogs and distributors, must be owned by an organization or organizational unit.

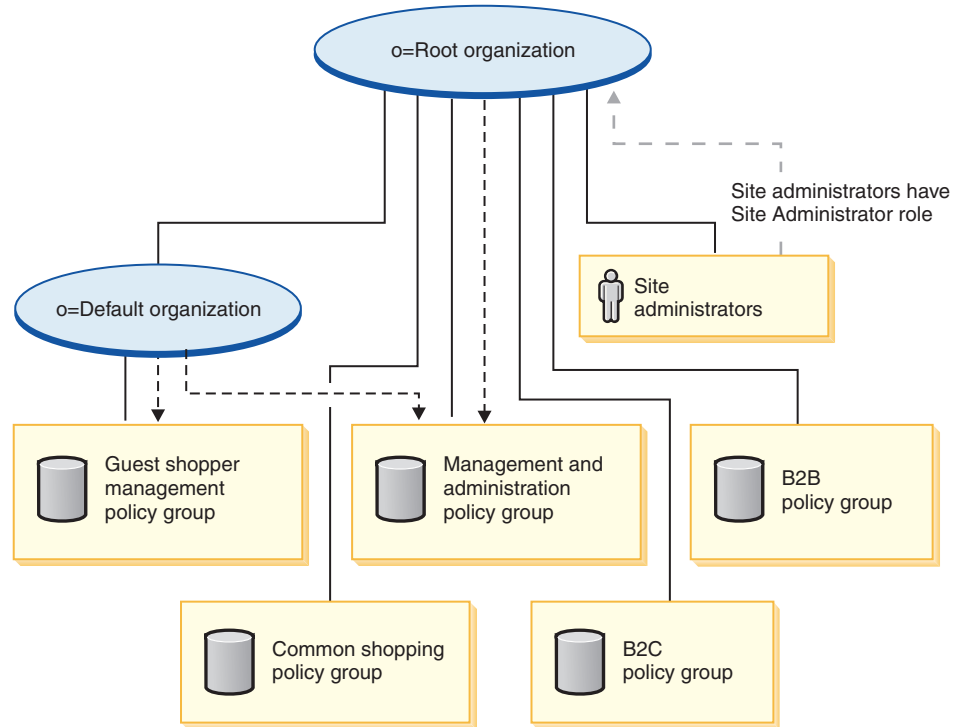
The organization structure and the access control model are closely related, in that the access control model applies access control policies to organizations rather than to different entities (stores, customers, administrators, and so on). The policies that apply to an entity (or resource) are applied to the organization that owns the entity or resource.

The following diagram outlines the basic WebSphere Commerce organization structure with access control.

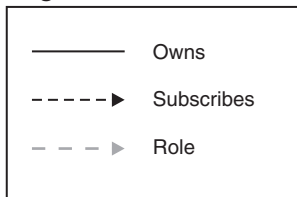
- **Root organization:** The root organization is the top level organization and is its own parent. All organizations in the WebSphere Commerce organization structure are descendents of the root organization. In this example the site administrators are owned by the root organization.
- **Default organization:** The default organization is under the root. All guest customers and all customers in consumer direct businesses belong to the default organization.
- **Child organizational entities:** One or more other levels of organizational entities can exist beneath the parent organizational entities. You can add as many child organizational entities as necessary to support your business.

The WebSphere Commerce access control structure is flexible enough to support all entities in the supported business models. During instance creation, only the root organization and default organization are created. The basic access control structure is installed during instance creation, regardless of the business model.

### Basic access control



#### Legend



The root organization owns the following default policy groups:

- Management and administration
- Common shopping
- B2C
- B2B

The default organization owns the following default policy groups:

- Guest shopper management

However, the root organization only subscribes to the management and administration policy group. The policies in this policy group apply to all of the resources owned by this root and its descendants, except for those descendant that subscribe to a policy group. Since the default organization subscribes to the policy groups, the policies from the root organization are not inherited. For the default

organization, the policies in the management and administration and guest shopper management policy groups are applied to any resources owned by the default organization.

For more detailed information on the default policy groups, see the appendix of the *IBM WebSphere Commerce Security Guide*.

## Consumer direct store archives

The following SAR files are associated with the consumer direct business model:

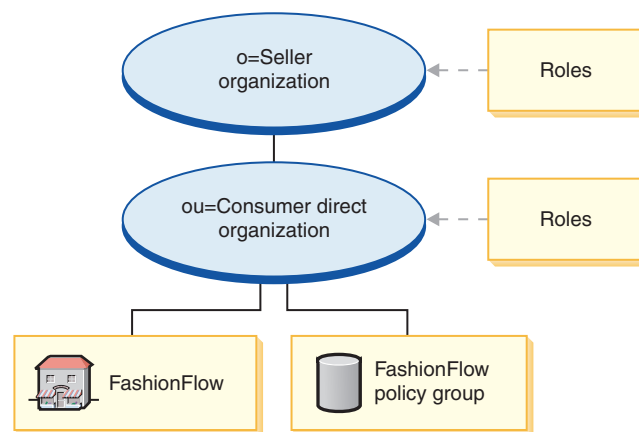
Table 8. Consumer direct business edition

Store archive name	Description
ConsumerDirect.sar	A sample composite store archive containing the organization structure, predefined user roles, and necessary access control policies and policy group subscriptions to create consumer direct environment, plus a feature-rich working store.
ConsumerDirectOrganizationStructure.sar	A sample store archive containing the organization structure and predefined user roles to create a consumer direct environment.
ConsumerDirectStore.sar	A sample store archive containing all the necessary assets to create a feature rich working consumer policy direct store. It also contains the necessary policy group subscriptions.

The roles on an organization indicate the possible roles that a user can play within the organization. For more information on roles, see the WebSphere Commerce online help.

### Consumer direct business edition

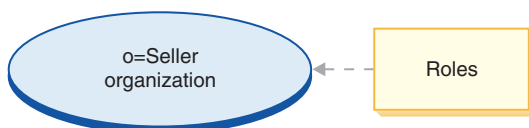
#### ConsumerDirect.sar contents



- Seller organization and roles: Account Representative, Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Marketing Manager, Operations Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Sales Manager, Seller Administrator, Seller, Store Administrator, Registered Customer

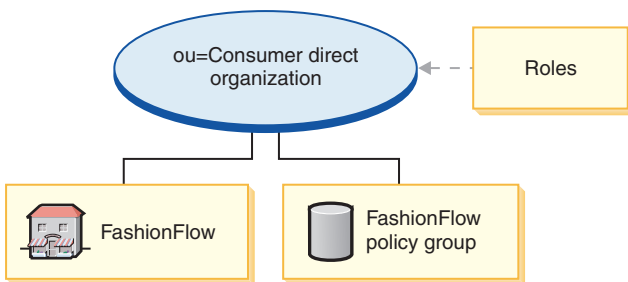
- Consumer direct organization and roles: Account Representative, Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Marketing Manager, Operations Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Sales Manager, Seller Administrator, Seller, Store Administrator, Registered Customer
- FashionFlow (sample store)
- FashionFlow policy group

### ConsumerDirectOrganizationStructure.sar contents



- Seller organization and roles: Account Representative, Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Marketing Manager, Operations Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Sales Manager, Seller Administrator, Seller, Store Administrator, Registered Customer

### ConsumerDirectStore.sar contents



- FashionFlow (sample store)
- Consumer direct organization (B2C) and roles: Account Representative, Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Marketing Manager, Operations Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Sales Manager, Seller Administrator, Seller, Store Administrator, Registered Customer
- FashionFlow policy group

### Consumer direct Basic Store

There is a new basic sample store that provides a minimal set of assets needed to make a store work. This is offered as an alternative to deleting large amounts of information. Instead, you can use the basic store sample as a foundation for a store, and then build on it, to suit your needs. The consumer direct business edition model also contains the following store archive (SARs):

Table 9. Consumer direct business edition Basic Store archive

Store archive name	Description
BasicStore.sar	Contains all the necessary assets to create a very basic working store. If you want to create a very different store than the store created by BasicStore.sar, use this store archive as a base for development.

### BasicStore.sar contents

- MiniFashion (sample store)
- ConsumerBasic Policy Group

There is no diagram to explain BasicStore.sar, because it does not attach to anything by default. It can be placed by the developer.

### Consumer direct professional edition

**Professional** The Consumer direct professional edition model contains the following store archives (SARs):

Table 10. Consumer Direct Professional Edition

Store archive name	Description
FashionFlow.sar	A sample store archive containing a feature-rich working store.

### FashionFlow.sar contents

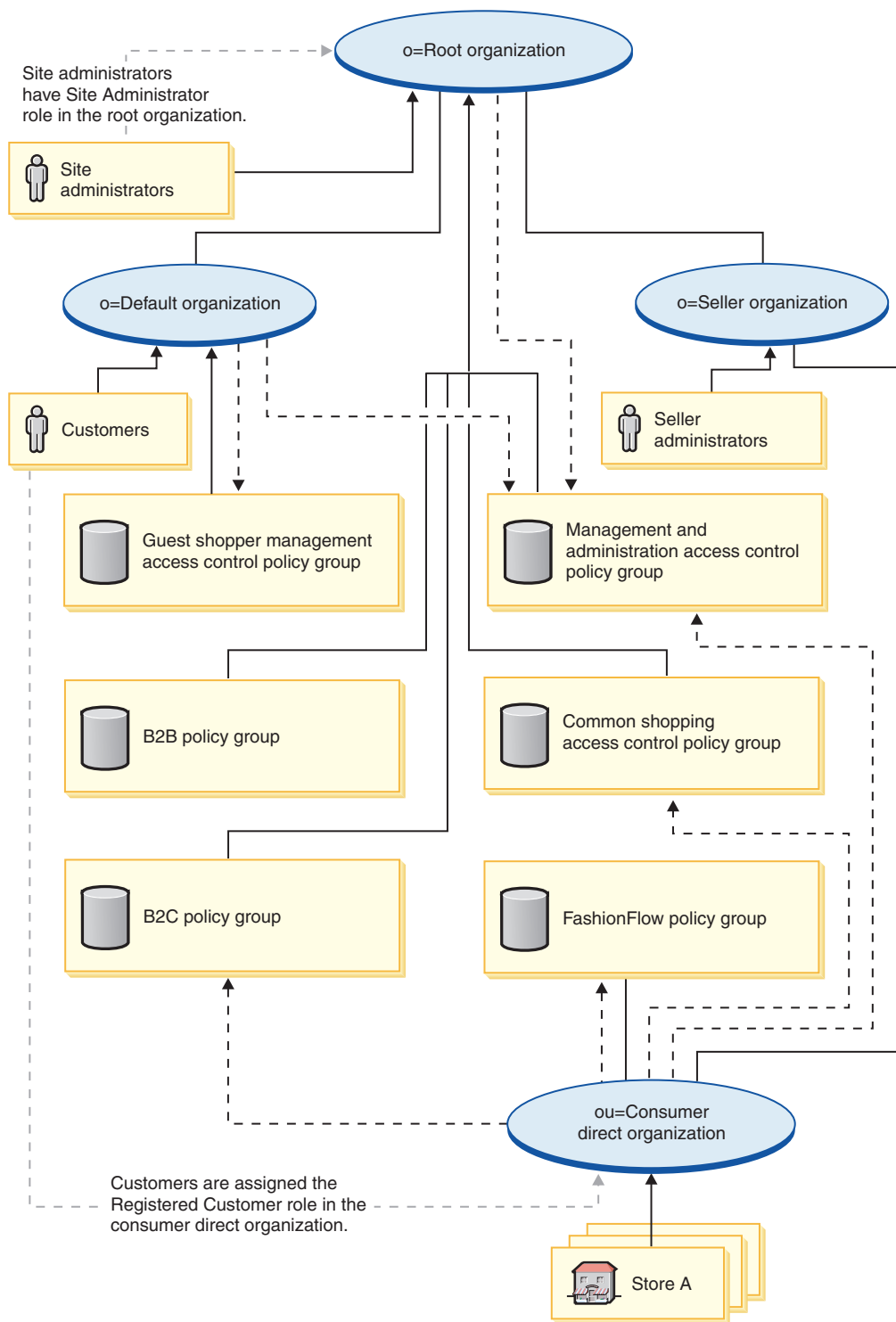


- FashionFlow (sample store)
- FashionFlow policy group

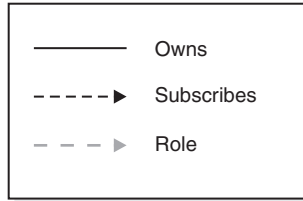
## Dynamically created roles for consumer direct

*Customers* are given the role of Registered Customer in the organization that owns the store to which they register (for example, ou = B2C Organization). This information is picked up from the MemberRegistrationAttributes.xml file. For more information, see “Roles and the MemberRegistrationAttributes XML file” on page 4 or the WebSphere Commerce online help.

The following diagram describes a basic consumer direct organization and access control structure.



### Legend



In this diagram describing the basic consumer direct organization, the root organization owns and subscribes to the default policy groups as described in 20.

The consumer direct organization subscribes directly to the B2C access control policy group, the management and administration policy group, and the common shopping policy group.

The consumer direct organization also owns and subscribes to the FashionFlow policy group. The FashionFlow policy group contains the following policy:

- AllUsersExecuteFashionAllUsersViews

Since access control policy groups are subscribed by organizational entities, if you are creating multiple stores in your site and want to apply different access control policy groups to individual stores, you must create separate organizations to own each store.





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## Chapter 4. Consumer direct sample store (FashionFlow) overview

FashionFlow is the consumer direct online clothing store provided with WebSphere Commerce. FashionFlow merges the features of all of the former IBM consumer direct stores (WebFashion, NewFashion, InFashion, WebAuction), as well as adding some new features. Some of the features included in the FashionFlow sample store are:

- Promotional e-mails, based on customers' interests
- Cross-sells, up-sells, accessories
- Rule-based discounts
- Coupons
- Product search capability
- Advanced search
- Multicultural support
- Availability dates for order items
- Backordering of items not currently in stock
- Splitting of orders based on customer preference
- Tracking order status
- E-mail notification of order status
- Collaboration through real-time customer support
- Wish lists
- Marketing campaign creation
- Quick checkout
- Prebuilt kits and bundles
- Three supported auction types: open cry, sealed bid, and Dutch Auction gallery
- Bid and auto-bid forms
- Text messages, including auction notifications
- Product catalog and item descriptions

FashionFlow provides all the pages and features necessary for a functioning consumer direct online store. FashionFlow is packaged with WebSphere Commerce as a store archive (as the composite: ConsumerDirect.sar, or as a component: ConsumerDirectStore.sar). In some cases, publishing a store archive to a WebSphere Commerce Server allows you to create a running store. In WebSphere Commerce, Business Edition, sample store archive files are also used to package and deliver organization structures, predefined user roles, and access control policies necessary to create the environment for your store or site, as well as collections of store assets that create a catalog or a storefront. In order to create a running store, you can publish one of the composite store archives. You can also publish a sequence of component store archives to publish a running store. Stores are published from the Administration Console; only Site Administrators can publish a store archive by selecting Site, and from the Store Archives menu, selecting Publish. The Store Archives page then displays listing the store archives available for publish. By default, the page showing composite store archives displays. For more information on publishing a store archive, see the WebSphere Commerce online help publishing information.

Since store creation in WebSphere Commerce is based upon selecting a sample store archive and modifying it, FashionFlow is designed to act as the basis for your store. It is based on a typical shopping flow. The sample store pages can be customized. All FashionFlow sample store pages are JavaServer Pages. These pages include HTML, Java, and JavaScript. The JSP files can be cached.

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## Chapter 5. Creating a store using the FashionFlow sample store

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### Part one: Publish and configure a store based on FashionFlow

**Note:** During Store Archive creation, do not use a store directory name with more than 15 characters, and do not use any digits in the store directory name. Also, do not use special characters like “\_” in the store directory name. If this is not followed, some store pages will fail with a message **Filename too long**

To create a store using the FashionFlow sample store, you must publish it, and then, optionally, you may configure it.

#### Publishing a store using the Administration Console

Publishing a store archive to a WebSphere Commerce Server allows you to create a running store. In WebSphere Commerce, Business Edition, sample store archive files are also used to package and deliver organization structures, predefined user roles, and access control policies necessary to create the environment for your store or site, as well as collections of store assets that create a catalog or a storefront. In order to create a running store, you must publish one of the composite store archives. You can also publish a sequence of component store archives to publish a running store, however that information is discussed in *Publishing a store archive from the Administration Console - Advanced Options* in the WebSphere Commerce online help.

**Important:** Follow the instructions here to publish composite store archives. For information on publishing any other type of store archive, see *Publishing a store archive from the Administration Console - Advanced Options* in the WebSphere Commerce online help.

To publish a store archive from the Administration Console, do the following:

1. Ensure that you have Site Administrator access.
2. Ensure appropriate services and servers are running. For detailed steps on the following, see *Ensuring appropriate services and servers are running for publishing* in the WebSphere Commerce online help.
  - a. Ensure that the database is started.
  - b. Ensure that the Web server is started.
  - c. Ensure that WebSphere Commerce is started.
  - d. Ensure that WebSphere Commerce Payments is started.
  - e. Ensure that appropriate payment methods are available.
3. Configure publish. For detailed steps on configuring publish, see *Configuring publish (AIX, SOLARIS, LINUX, and Windows)* in the WebSphere Commerce online help.
4. (Optional) Back up your WebSphere Commerce database, so you can restore your pre-published version if necessary.
5. Open the Administration Console, selecting the Site option.
6. From the Store Archives menu, select Publish. The Store Archives page displays listing the store archives available for publish. By default, the page

displaying composite store archives displays. For information on publishing any other type of store archive, see *Publishing a store archive from the Administration Console - Advanced Options* in the WebSphere Commerce online help.

7. Select the store archive you want to publish. To see a preview of the store, click **Preview**. An HTML version of the published store displays in another window.

**Note:** Previews are only available for store archives that contain customer facing stores.

8. Click **Next**. The Parameters page displays. Depending on the store archive you selected, different parameters will display. For more information, see *Publish utility parameters by store archive* in the WebSphere Commerce online help.
  - a. If you are publishing a sample store archive for the first time, accept the default values in the parameter fields. If you are publishing a sample store archive other than a composite store archive, or if you want to publish a second store of the same type of a previously published store archive, see *Publishing a store archive from the Administration Console - Advanced Options* in the WebSphere Commerce online help. **Important:** We do not recommend that you publish more than one type of composite store archive or organization structure store archive in the same instance (for example, do not publish a ConsumerDirect.sar and DemandChain.sar in the same instance), or that you publish the same composite store archive or organization structure store archive more than once, as doing so may overwrite data previously published.
  - b. Click **Next**. The Summary page displays, listing the store archive and parameters selected, as well as the location to which the store archive will be published. If you want to review the file structure of the store once it is published, note the published location for future reference.
9. After reviewing the summary information, click **Finish**. A confirmation dialog displays, telling you the number of the publishing job. Note the job number for future reference. Click **OK**. The Publish Job Status page displays. The publishing state is reflected in the Publish status column. Click **Refresh** to update the status.
10. To see more details about a particular publish job, select it from the list. Click **Details**. The Publish Details page displays. While the store archive is being published, the Publish Details page is automatically refreshed every 20 seconds with the latest publishing status.

**Note:** If an error occurs during publishing, a window displays with more details about the error. If you need more information, see *Troubleshooting publishing* in the WebSphere Commerce online help.

11. Review the publishing details.
12. If the store archive published successfully, you have the option of launching your store. To view and test your store, Click **Launch Store**. A dialog box displays, asking you for the Web Application context. Accept the default. Click **OK**.

**Notes:**

- a. Compiling the JavaServer Pages (JSP) files in your site or store before launching it will significantly reduce the amount of time needed to load each store page. As a result, it is recommended that you batch compile

your store or sites JSP files after publishing a store archive. To batch compile the store's JSP files, see *Compiling your JavaServer Page files* in the WebSphere Commerce online help.

- b. If you publish the B2B Direct store archive (ToolTech), you must stop and restart the commerce server before viewing the store, or the registration page will not display properly. For more information, see *Starting and stopping WebSphere Commerce* in the WebSphere Commerce online help. In order to prevent unnecessary exceptions displaying, delete the SendTransactionMsg job from the scheduled jobs. For more information, see *Deleting a scheduled job* in the WebSphere Commerce online help.
13. In order to enable caching in the sample stores, you must merge the cachespec.xml file from the following directory:  
WC\_installdir/samples/dynacache/businessmodelname with the cachespec.xml file in the following directory:  
WAS\_installdir/installedApps/cellname/WC\_instancename.ear/Stores.war/WEB-INF

400

WAS\_userdir/InstalledApps/cellname/WC\_instancename.ear/Stores.war/WEB-INF

You must edit the existing cachespec.xml file in the WEB-INF directory with the changes in the first file, rather than replace it.

**Note:** In WebSphere Studio, caching is turned on by default, so you do not need to complete this step if you are publishing in WebSphere Studio. When you have finished viewing the store, bookmark the site, and close the browser.

**Important:**

1. If you are running your Web server on a separate node than the WebSphere Commerce node, complete the following steps after publishing a store archive:
  - a. Stop the Web server.
  - b. Copy store's web assets from the following directory from the WebSphere Commerce machine to the Web Server machine in the same location:  
WAS\_installdir/installedApps/cellname/WC\_demo.ear/Stores.war  
400 WAS\_user\_dir/InstalledApps/cellname/WC\_demo.ear/Stores.war
  - c. Start the Web server.
2. If you change the Web application Context path, you must ensure that it matches the path defined in the WebSphere Commerce Server.
3. Only one store archive at a time can be published.
4. When you launch the FashionFlow store from Administration Console, you are logged into the store with the same user name and password that you used to log into Administration Console. If you change your password in the store, you are also changing it for Administration Console. Instead, to test the features in the store, including changing your password, save the site address, close all browser windows, then log on to the store again. For more information, see *Limitations when using multiple browsers windows*.
5. If you plan to make changes to your JSP files after publishing your store, you should disable servlet caching in the WebSphere Application Server. For more information see the "Dynamic caching" chapter in the *WebSphere Commerce Administration Guide*. If you are using WebSphere Commerce Studio, the servlet caching is disabled by default.

**Note:** If you have a store based on a previous consumer direct store SAR (for example, from WebFashion, NewFashion, the FashionFlow Commerce Enhancement Pack) published on the machine on which you are installing either ConsumerDirectStore.sar (BE) or FashionFlow.sar (Professional), you need to create a new organization to use as the store owner when you create a store archive based on ConsumerDirectStore.sar (BE) or FashionFlow.sar (Professional). The newly created organization will display in the WebSphere Commerce Organization Administration Console. Click **Access Management** and then **Organizations**. To create a new store organization, see *Creating an organization* in the WebSphere Commerce online help.

For more detailed information on publishing, including advanced options, see the WebSphere Commerce online help.

## Configuring a store using the WebSphere Commerce Accelerator

To configure a store to support certain features, do the following:

**Important:** Currently the following features are the only features available for configuration:

### Stores based on the consumer direct sample store

- Customer care
- Auctions
- Catalog
- Checkout
- Quick Checkout
- Order Status
- Registration
- Coupons
- Product Advisor

### Hosted stores or reseller stores created using the consumer direct sample store

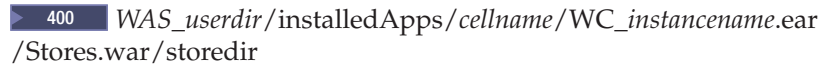
- Customer care
- Auctions
- Catalog
- Checkout
- Quick Checkout
- Order Status
- Registration
- Coupons

### Stores based on the B2B direct sample stores

- Customer care
- Collaborative Workspaces



These features are only available for configuration in stores that are based on the consumer direct or B2B direct sample stores, so hosted stores created with the Store Creation Wizard would also have the available features.

1. (Optional) Create copies of the JSP files of the store that you are about to configure. The JSP files are located in the following directory:  
`WAS_installdir/installedApps/cellname/WC_instancename.ear/Stores.war/storedir`

 `WAS_userdir/installedApps/cellname/WC_instancename.ear/Stores.war/storedir`

Creating copies of your JSP files allows you to undo any changes in a store, that you may apply permanently in step 8.

2. Open WebSphere Commerce Accelerator.
3. From the Stores menu, select **Change Flow**.
4. From the left navigation frame, select the feature you want to configure.
5. If you want to enable the feature in the store, select the appropriate field (for example, a check box or radio button). If you want to disable the feature in the store, ensure that the appropriate field is deselected.

**Note:**   In order to use the Collaborative Workspaces and Customer Care features in your store, you must install Lotus® QuickPlace™ (Collaborative Workspaces) and Lotus Sametime™ (Customer Care). For more information, see the *WebSphere Commerce Additional Software Guide*.

6. Select **Apply** or **Apply Permanently** to apply the changes. Selecting **Apply** allows you to view the changes in the current store, but your choice can be reversed later. If you choose **Apply Permanently** you will not be able to reverse your choice. For more information on how changes are applied, see *Configuring store flows using WebSphere Commerce Accelerator* in the WebSphere Commerce online help.
7. Click **Launch Store** to view the changes in your store. If you do not see the changes, refresh your browser.
8. When you have finished configuring the store, enable caching. For more information, see the *WebSphere Commerce Administration Guide*.

For more detailed information on configuring a store and changing the store flow, see the WebSphere Commerce online help.

After publishing a sample store, you may be required to perform additional steps to get the store running at full functionality. Those steps follow.

---

## Part two: Creating e-mail templates

You need to populate the EMLMSG table if you need to create an e-mail activity. These steps will populate the EMLMSG table with the three templates, which are provided with FashionFlow. After completing these steps, customers can go to the WebSphere Commerce Accelerator to send e-mails with these templates.



**Note:** For the following steps, you will need the store Id. To find it, do the following: `select * from storeent`

### Prerequisite

1. The database user has to have rights to create files in the script (createEmailTemplate) in `wc_installdir/CommerceServer55/bin/`.
2. There is no file named temp.sql in the directory `wc_installdir/CommerceServer/bin/`.



## Running the script

1. Log on as the database user.  Start a QSH shell session (by run STRQSH).
2. At a command prompt, navigate the following directory:
  - a. `wc_installdir/CommerceServer55/bin/`. The script is called `createEmailTemplate`.
3. Within that directory, at a command prompt, type the following, where:
  - `db_name` = the name of the WCS database
  - `db_user` = the db user name of `db_name`
  - `host_name` = the host name of the WCS server
  - `storeId` = the store ID of FashionFlow
  - `user_password` = the user's password
  -  `password` = the password for the logon ID

 DB2

- a. to add the template for men's fashions:

```
createEmailTemplate.db2 db_name db_user
http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFMen
DisplayView noProperty EmailTemplateFFMenDisplayView "Mens
fashions" storeId
 createEmailTemplate.db2.sh db_name db_user password
http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFMen
DisplayView noProperty EmailTemplateFFMenDisplayView "Mens
fashions" storeId
```
- b. to add the template for women's fashions:

```
createEmailTemplate.db2 db_name db_user
http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFWomen
DisplayView noProperty EmailTemplateFFWomen
DisplayView "Womens fashions" storeId
 createEmailTemplate.db2.sh db_name db_user password
http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFWomen
DisplayView noProperty EmailTemplateFFWomenDisplayView "Womens
fashions" storeId
```
- c. to add the template for specials:

```
createEmailTemplate.db2 db_name db_user
http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFSpecials
DisplayView noProperty EmailTemplateFFSpecials
DisplayView "Specials" storeId
 createEmailTemplate.db2.sh db_name db_user password
http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFSpecials
DisplayView noProperty EmailTemplateFFSpecialsDisplayView
"Specials" storeId
```

 Oracle


- a. to add the template for men's fashions:


```
createEmailTemplate.oracle db_name db_user user_password
http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFMen
DisplayView noProperty EmailTemplateFFMen
DisplayView "Mens fashions" storeId
```



- b. to add the template for women's fashions:
 

```
createEmailTemplate.oracle db_name db_user user_password
http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFWomen
DisplayView noProperty EmailTemplateFFWomen
DisplayView "Womens fashions"storeId
```
  - c. to add the template for specials:
 

```
createEmailTemplate.oracle db_name db_user user_password
http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFSpecials
DisplayView noProperty EmailTemplateFFSpecials
DisplayView "Specials"storeId
```
4.  When prompted, enter the user's database password.

 Using the Operations Navigator, or some other method, run the following SQL on your instance:

1. To add the template for men's fashions:
 

```
insert into schemaname.emlmsg (emlmsg_id, jsppath, propertyfile, name,
description, storeent_id) select coalesce(max(emlmsg_id), 0) + 1,
'http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFMen
DisplayView', 'noProperty', 'EmailTemplateFFMen
DisplayView', 'Mens fashions', storeId from emlmsg ;
```
2. To add the template for women's fashions:
 

```
insert into schemaname.emlmsg (emlmsg_id, jsppath, propertyfile, name,
description, storeent_id) select coalesce(max(emlmsg_id), 0) + 1,
'http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFWomen
DisplayView', 'noProperty', 'EmailTemplateFFWomen
DisplayView', 'Womens fashions', storeId from emlmsg ;
```
3. To add the template for specials:
 

```
insert into schemaname.emlmsg (emlmsg_id, jsppath, propertyfile, name,
description, storeent_id) select coalesce(max(emlmsg_id), 0) + 1,
'http://host_name/webapp/wcs/stores/servlet/EmailTemplateFFSpecials
DisplayView', 'noProperty', 'EmailTemplateFFSpecials
DisplayView', 'Specials', storeId from emlmsg ;
```

where:

- *schemaname* is the name of your instance
- *host\_name* is the host name of the WebSphere Commerce server
- *storeId* is the store ID for FashionFlow

---

## Part three: Configure and activate predefined discounts

FashionFlow provides four sample discounts with data included. The discounts are:

- free shipping if you spend over \$100 and choose regular mail
- spend \$150.00 and get 15% off
- buy an evening dress and get a free evening bag
- buy a tank top, and get 30% off the second tank top

These discounts need to be configured and activated, as shown. This is done in the WebSphere Commerce Accelerator. Select the store. Then, select the discount to be modified.

**Note:** For more detailed steps, and some optional steps showing how to modify the existing information, refer to the specific discount tutorial.

## Free shipping

1. From the Merchandise menu, select **Order Promotions**. The Order Promotions window displays.
2. Check the box next to freeShipping. Click **Activate** to activate the discount.
3. Select Discounted Shipping from the side menu. The Discounted Shipping window opens.
  - a. The Free Shipping option will already be selected.
  - b. You need to highlight **Regular mail** from the drop down menu for Shipping modes. Do this by re-selecting it from the drop-down menu.
  - c. The minimum qualification for the customer to receive free shipping will already be selected. It will be: **Specify a minimum qualification for this discount**, and **100.00** as the purchase amount.
  - d. There will be a box checked: **Allow this discount to be applied in combination with a product promotion**.
  - e. Click **OK**.
4. Click **OK** to the dialog box. You return to the Product Promotions window.

## Spend \$150.00 and get 15% off

1. From the Merchandise menu, select **Order Promotions**. The Order Promotions window displays.
2. Check the box next to over150 and click **Activate** to activate the discount.
  - a. Review the internally used description: **Spend \$150 and get 15% off of your entire order**.
  - b. Review the short description for the customer: **Spend \$150 and get 15% off**.
  - c. There will be a long description for the customer. This appears in the Discount Details. This includes disclaimers, promotion details. Here is a sample: **The \$150 amount applies to merchandise only. The 15% discount is applied to the total purchase price before taxes. Taxes, shipping and handling do not count toward the qualifying amount. If you spend \$150, the 15% discount promotion will take precedence, and you will not be eligible for our Get free shipping on purchases of \$150 or more when you choose regular mail promotion. This promotion is exclusive to our online customers. Offer subject to change without notice.**
  - d. A priority will be included. The priority applies if you have two discounts that can apply to the same purchase; only one discount can be applied. The priority is how precedence is determined.
  - e. There will be a target sales volume included. This is a monetary amount.
  - f. Click **OK**.
3. Click **OK** to the dialog box. You return to the Product Promotions window.

## Buy an evening dress and get a free evening bag

1. From the Merchandise menu, select **Product Promotions**. The Product Promotions window appears.
2. Check the box beside freeBag and click **Activate** to activate the discount.
3. Click **Select Merchandise** from the side menu. The Select Merchandise window opens.

4. Click **Search Product**. The Product Search window opens.
  - a. In the name field, type **eveningdress**, and click **Search**.
  - b. The search results return one product.
  - c. Check the box beside the evening dress (product-sku-nf-701) and click **Add**.
5. Select **Free Gift with Purchase** from the side menu. The Free Gift with Purchase window opens.
6. This is when you associate the free gift with the product purchase. You will need the SKU, which you will search for in a moment.
7. Click **Search Product**. The Product Search window opens.
  - a. In the name field, type **evening bag** and click **Search**.
  - b. Check the box beside the evening bag (item-sku-nf-1072) and click **Add**.
  - c. There will be a **1** in the Quantity to Add field.
  - d. **Specify the minimum quantity to purchase** is selected, since we want the customer to buy one evening dress to receive the bag, and then **1** is in the item field.
  - e. Click **OK**.
8. Click **OK** to the dialog box. You return to the Product Promotions window.

## Buy a tank top, and get 30% off the second tank top

1. From the Merchandise menu, select **Product Promotions**. The Product Promotions window opens.
2. Check the box next to next30Percent and click **Activate** to activate the discount.
3. Click **Select Merchandise** from the side menu. The Select Merchandise window opens.
  - a. Click **search product**.
  - b. The Product Search window opens.
  - c. In the Name field, type **sport tank top**, and select **exact phrase**. Click **search**.
  - d. The search produces four items. You must add these items individually. The promotion is applied at the item level, not at the product level.
  - e. Check the box beside one of the sport tank tops (item-sku-nf-2395) and click **Add**.
  - f. Click **OK**.
4. Click **OK** to the dialog box.
5. Check the box beside next30Percent and click **Duplicate**.
6. In the dialog box, type the name for the next item, **next30Percent2**, and click **OK**. This must be a unique name.
7. You must repeat these steps for every attribute associated with the item. For example, with the tank top, you must repeat the steps to create a promotion for every color and size the tank top is available in. It is available in 2 sizes and 2 colors, so you must create 4 promotions, so that it will be applied to whichever tank top the customer chooses.
8. Repeat steps 5 through 6, checking the box beside next30Percent, clicking **Duplicate**, the first time naming the next item **next30Percent3**, the second time naming the item **next30Percent4**, so that you have a name for every item.
9. Now, repeat steps 2 through 3, the first time checking the box next to **next30Percent2**, modifying, and using item-sku-nf-2396, the second time checking the box next to **next30Percent3**, modifying, and using

item-sku-nf-2397, and the third time checking the box next to **next30Percent4**, modifying, and using item-sku-nf-2398. So, each promotion has a different item added to it.

10. You return to the Product Promotions window.

## Activating any rules based discount

1. To activate a discount, in the Order Discount window for freeShipping and over150, or the Product Promotions window for freeBag and next30Percent, check the box next to the discount to activate it.
2. Select **Activate**. You will see the status change from Inactive to Active.

### Notes:

1. The Description (Customer Viewable) field in the discount GUI is shown in the Product Display page and the Shopping Cart page. The Long Description (Customer Viewable) field in the discount GUI is shown in the Discount Details Display page.
2. Since Ad Copy and Campaign Initiative have been predefined for these four discounts, discount banner advertisements will show on the home page once the discounts are activated. If the cache is enabled, banner advertisements will not be shown even if the discounts are activated. To clear the cache, you need to install the WebSphere Application Server Cache Monitor. For details, see the *WebSphere Commerce Administration Guide* for details.

---

## Part four: Creating scheduled jobs for a sample store

After publishing a sample store, scheduled jobs needs to be created for the store in the WebSphere Commerce Accelerator, which can be accessed by typing the following Web address in your browser: `https:// host_name:8000/Accelerator` where *host\_name* is the fully qualified TCP/IP name of your WebSphere Commerce Server and :8000 is the tools port number for your instance. You can find the tools port number in the Configuration Manager, under **Instance properties> WebSphere**. On the machine where WebSphere Commerce Studio is installed, access the following Web address in your browser: `https:// host_name/webapp/wcs/tools/servlet/ToolsLogon?XMLFile=common.mcLogon` where *host\_name* is the fully qualified TCP/IP name of your WebSphere Commerce Server and :8080 is the port number of WebSphere Test Environment . The following list shows the scheduled jobs that must be created for the sample store:

- BalancePayment
- PayCleanup
- ProcessBackorders
- RAReallocate
- ReleaseExpiredAllocations
- ReleaseToFulfillment
- ReturnCreditAndCloseScan

Here is a brief descriptions of the jobs:

### BalancePayment

This job calls the DoDepositCmd task command to capture payment once the order has been shipped. This command implements the automatic payment capture function for WebSphere Commerce.

**PayCleanup**

This job cancels WebSphere Commerce orders with payment authorization requests rejected by the respective financial institutions for longer than a store configured period of time.

**ProcessBackorders**

This job allocates inventory to backorders which were created when inventory was not available.

**RAReallocate**

(Redistribute allocations against expected inventory) This job redistributes open Expected Inventory Records (EIR) against existing backorders. This is required to more accurately predict when backordered order items will be available as EIR information is added or modified, and as previously backordered items are deleted or allocated.

**ReleaseExpiredAllocations**

This job returns allocated inventory back into the receipt table from a previously allocated order line item which has exceeded its expiration time limit.

**ReleaseToFulfillment**

This job releases allocated items on an order to fulfillment.

**ReturnCreditAndCloseScan**

This job scans for return merchandise authorizations that are eligible to be credited and marked closed.

To create a scheduled job, follow the instructions found in (Scheduling a store level job) for each job, in the online help. The following table lists the recommended parameters for each job:

Scheduled job name	Recommended start time	Recommended interval (seconds)	Recommended priority
BalancePayment	00:00	86400	1
PayCleanup	00:00	86400	1
ProcessBackorders	00:00	43200	8
RAReallocate	00:00	86400	1
ReleaseExpiredAllocations	00:00	3600	8
ReleaseToFulfillment	00:00	600	10
ReturnCreditAndCloseScan	00:00	86400	1

Setting the start time to 00:00 starts the scheduled job immediately.

**Note:** The **Job Parameters** field in the Schedule Job window does not need to be filled in for these jobs.

---

## Part five: Configuring e-mail notification for a sample store

The following procedure enables customer e-mail notification when payment is authorized, when an order is authorized, and when an order is cancelled. Note that you must have a mail server set up in order to e-mail customers.

**Note:** If you do not have a mail server set up, you will not be able to send e-mail notifications from your store, but the rest of the features of the sample store will still work.

The following table shows the e-mail notifications supported for FashionFlow:

E-mail notifications supported	Message type
Password reset	Notification message for password reset
Authorized order	Notification message for a authorized order
Submission order	Notification message for a received order
Canceled order	Notification message for a canceled order
Shipping notification	Message for notifying the customer of an order release manifestation
Wish list	A broadcast message

To enable e-mail notifications, do the following:

1. Ensure that the IBM WebSphere Application Server administration server is started.
2. Open the Administration Console using a Site Administrator ID.
3. On the Administration Console Site/Store Selection page select **Store**. The Select Store and Language section displays.
4. From the **Name** list, select the store.
5. From the **Language** drop-down list, select the language. Click **OK**. The Store Administration Console home page displays.
6. From the **Configuration** menu, click **Transports**. The Transport Configuration page displays.
  - a. Verify that the **E-mail** transport has a status of Active. If e-mail is inactive, select it, then click **Change Status**.
  - b. Select **E-mail** then click **Configure**. The Transport Configuration Parameters page displays.
  - c. In the **Host** field, type your fully qualified mail server name, for example, myserver.ibm.com.
  - d. In the **Protocol** field, type smtp in lowercase letters, or the protocol of your choice. Click **OK**.
7. From the **Configuration** menu, click **Message Types**. The Message Type Configuration page displays.
8. Create the notification to be sent when payment is authorized as follows:
  - a. Click **New**. The Message Transport Assignment page displays.
  - b. Select the message type from the **Message Type** drop-down list. See the table above for the message types to use in your store.
  - c. In the **Message Severity** field, type 0 to 0
  - d. From the **Transport** drop-down list, select **E-mail**. If e-mail is not there, do the following:
    - 1) From the **Configuration** menu, select **Transports**. The Transport Configuration page displays.
    - 2) Click **Add**. The Add Transport dialog opens.
    - 3) Select the check box next to the transport you want to add to the store. You can select all transports by selecting the check box at the top-left. If

there are no transports available, then you have already added all of the transports made available by the Site Administrator.

- 4) Click **Add** to add the transport, or click **Cancel** to return to the Transport Configuration page.
- e. From the **Device Format** drop-down list, select **Standard Device Format**.
- f. Click **Next**. The Message Transport Assignment Parameters page displays.
- g. Complete the fields as follows:

**Host** The fully qualified name of your mail server, for example, `example.ibm.com`

**Protocol**  
Type `smtp` (you must use lowercase letters), or the protocol you are using.

**Recipient**  
Type a valid e-mail address. This address will be replaced by the customer's e-mail address at run time.

**Sender**  
Type an e-mail address that you want to use as the sender of the message, for example, `orders@example.ibm.com`. The address must be an mail address for a valid user on the mail server.

**Subject**  
Type the text that you want to display as the subject line of the message, for example, `Your order has been accepted`.

- h. Click **Finish**. The Message Type Configuration page displays.
9. For each message type in your sample store, repeat step 8.

**Notes:**

1. It will often take a long time before canceled order notification e-mail is sent. The time can be shortened by:
  - a. Setting the value of the `REJECTEDORDEREXPIRY` column in the (STORE) database table to a smaller value.
  - b. Change the `PayCleanup` scheduled job to have a smaller schedule interval.

For more information about shipping notifications, see `ReleaseShipNotify` message in the online help

---

## Part six: Creating a marketing campaign

The following steps show an example of how to set up two campaigns: End of Season Sale, and Hot Sale.

The goal of the End of Season Sale campaign is to sell off seasonal clothing items before the season ends. This campaign uses a suggestive selling initiative. The initiative targets registered customers, by suggesting items based on the customer's gender.

The goal of the Hot Sale campaign is to sell the season's top trends. The Hot Sale also uses a suggestive selling initiative, which targets registered customers, but suggests items based on the customer's age.

To set up the End of Season Sale and Hot Sale campaigns, do the following:

1. Open the WebSphere Commerce Accelerator
2. Create new male and female customer profiles



3. Create age-based customer profiles
4. Create the End of Season Sale campaign
5. Create End of Season Sale campaign initiatives
6. Schedule the e-Marketing Spot for End of Season Sale
7. Create Hot Sales campaign
8. Create Hot Sales campaign initiatives
9. Schedule the e-Marketing Spot for Hot Sales

Once you have created the marketing campaigns, you should create discounts, then register and shop at the store.

## Create new male and female customer profiles

1. From the **Marketing** menu, click **Customer Profiles**. The Customer Profiles page displays.
2. Click **New**. The Customer Profile notebook displays.
3. From the left navigation bar, click **General**.
4. Call this customer profile Male. Type Male in the field.
5. In the **Description** field, type a description of the customer profile group. For example, All registered male customers.  
This description will appear in the primary Customer Segments window. This field is for the benefit of people using the profile to create campaigns, and does not factor in to program logic.
6. From the left navigation bar, select **Demographics**, then **Gender**.
7. Select **Target the following genders**, then select **Male**.
8. Click **OK** to save the profile and close the notebook. The customer profile is displayed in the Customer Profile page.
9. Repeat steps 2 through 8 to create a female group.

## Create age-based customer profiles

1. From the **Marketing** menu, click **Customer Profiles**. The Customer Profiles page displays.
2. Click **New**. The Customer Profile notebook displays.
3. From the left navigation bar, click **General**.
4. Call this customer profile *over 29*. Type over 29 in the field.
5. In the **Description** field, type a description of the customer profile group. For example, All registered customers over the age of 29.  
This description will appear in the primary Customer Segments window. This field is for the benefit of people using the profile to create campaigns, and does not factor in to program logic.
6. From the left navigation bar, select **Demographics**, then **Age**.
7. Select **Target the following age groups**, then select all the age groups over 29.
8. Click **OK** to save the profile and close the notebook. The customer profile is displayed in the Customer Profile page.
9. Repeat steps 2 through 8 to create an under 29 group.

## Create the End of Season Sale campaign

The End of Season Sale campaign will display different products to different audiences. For example a male customer will see the following products: striped sweatshirt, weather jacket, and walking shorts. A female customer will see the



following products: summer nightgown, short skirt and summer dress. FashionFlow includes an e-Marketing Spot on the store home page (StoreCatalogDisplay.jsp) for this campaign.

To create the End of Season Sale campaign, do the following:

1. From the **Marketing** menu, click **Campaigns**. The Campaigns list displays, containing the campaigns currently defined for the selected store.
2. Click **New**. The New Campaign wizard launches, enabling you to define your campaign. The Campaign General Definition page is the first page to display.
3. In the **Campaign name** field, type End of Season Sale.
4. In the **Description** field, type a sample description of your choice of the campaign. For example, The End of Season Sale campaign will target the current season's merchandise to registered customers.
5. Click **Next**. The Business Objectives Definition page displays.
6. In the **Campaign sponsor** field, type the name of the campaign sponsor. For example, your name.
7. In the **Campaign objectives** field, type the business objectives of the campaign. For example, to sell off seasonal clothing items before the season ends.
8. Click **Finish** to save the campaign. The campaign is displayed in the Campaigns list. You must create initiatives before this campaign can be used. You will create initiatives in the next step.

## Create End of Season Sale campaign initiatives

1. In the WebSphere Commerce Accelerator, go to the Marketing menu.
2. Select **Campaign Initiatives**. The Campaign Initiatives list displays.
3. Set up a condition for the male group by doing the following:
  - a. Click **New**. The Campaign Initiative General Definition page of the Campaign Initiative wizard displays.
  - b. In the **Campaign Initiative name** field, type End of Season Sale initiative - male.
  - c. In the **Description** field, type a description of the initiative. For example, Suggestive selling by gender on the home page.
  - d. In the **Campaign** field, select **End of Season Sale**.
  - e. In the **Initiative Classification** field, select **Suggestive sell on products, categories, or awareness advertisements**.
  - f. Click **Next**. The **Defining displayed dynamic content** page displays.
  - g. Select **Suggest specific products**.
  - h. Click **Find**. The Find Products page displays.
  - i. In the **Short description** field, type striped sweatshirt. Click **Find**. A list of striped sweatshirts displays in the Search Results page.
  - j. Select the striped sweatshirt that includes the word *product* in the SKU. then click **Add**. The **Defining displayed dynamic content** page displays with striped sweatshirt in the list.
  - k. Repeat steps g through j twice, selecting **Weather jacket** and then **Walking shorts**.
  - l. Click **Next**. The **Defining Target Customers** page displays.
  - m. Select **Target specific profiles**.
  - n. From the **Available customer profiles** list box, select **Male** and click **Add**.
  - o. Click **Next**. The **Defining Dates for Target Customers** page displays.

- p. Select **Everyday**.
  - q. Click **Next**. The **Defining Target Customer behaviors** page displays. You will not target any customer behaviors.
  - r. Click **Finish** to save the new campaign initiative. The initiative is displayed in the Campaign Initiatives list.
4. Set up a condition for the female group by doing the following:
    - a. Click **New**. The Campaign Initiative General Definition page of the Campaign Initiative wizard displays.
    - b. In the **Campaign Initiative name** field, type End of Season Sale initiative - female.
    - c. In the **Initiative Classification** field, select **General**.
    - d. In the **Description** field, type a description of the initiative. For example, Suggestive selling by gender on the home page.
    - e. In the **Campaign** field, select **End of Season Sale**.
    - f. Click **Next**. The **Defining displayed dynamic content** page displays.
    - g. Select **Suggest specific products**.
    - h. Click **Find**. The Find Products page displays.
    - i. In the **Name** field, type Summer nightgown. Click **Find**. A list of summer nightgowns displays in the Search Results page.
    - j. Select the summer nightgown that includes the word *product* in the SKU. then click **Add**. The **Defining displayed dynamic content** page displays with summer nightgown in the list.
    - k. Repeat steps g through j twice, selecting **Casual skirt** and then **Short-sleeve summer dress**.
    - l. Click **Next**. The **Defining Target Customers** page displays.
    - m. Select **Target specific profiles**.
    - n. From the **Available customer profiles** list box, select **Female** and click **Add**.
    - o. Click **Next**. The **Defining Dates for Target Customers** page displays.
    - p. Select **Everyday**.
    - q. Click **Next**. The **Defining Target Customer behaviors** page displays. You will not target any customer behaviors.
    - r. Click **Finish** to save the new campaign initiative. The initiative is displayed in the Campaign Initiatives list.
  5. Click **Finish**.

## Schedule an e-Marketing spot for End of Season Sale

1. From the **Marketing** menu, click **e-Marketing Spots**. The e-Marketing Spots list displays, containing the e-Marketing Spots currently defined for the selected store.
2. Select the check box to the left of the **StoreHomePage** e-Marketing Spot. Click **Schedule**. The Campaign Initiative Schedule list displays.
3. Click **New**. The Schedule Campaign Initiatives page displays.
4. From the **Selected Campaign** drop-down box select End of Season sale.
5. Add End of Season Sale initiative - male and End of Season initiative - female.
6. Click **OK** to save the schedule assignment. The Schedule Campaign Initiatives page displays with the initiatives you have scheduled in the Sale e-Marketing spot.

## Create Hot Sales campaign

The Hot Sales campaign will display different advertisements to different audiences. For example a customer under the age of 29 will see the following products: short summer dress, sporty tank top and team shirt. A customer over the age of 29 will see the following products: floral shirt, knit long- sleeve shirt and plain front cotton pants.

To create the Hot Sale campaign, do the following:

1. From the **Marketing** menu, click **Campaigns**. The Campaigns list displays, containing the campaigns currently defined for the selected store.
2. Click **New**. The New Campaign wizard launches, enabling you to define your campaign. The Campaign General Definition page is the first page to display.
3. In the **Campaign name** field, type Hot Sale.
4. In the **Description** field, type a sample description of your choice of the campaign.
5. Click **Next**. The Business Objectives Definition page displays.
6. In the **Campaign sponsor** field, type the name of the campaign sponsor. For example, your name.
7. In the **Campaign objectives** field, type the business objectives of the campaign. For example, To sell new items to targeted customers.
8. Click **Finish** to save the campaign. The campaign is displayed in the Campaigns list. You must create initiatives before this campaign can be used. You will create initiatives in the next step.

## Create Hot Sales campaign initiatives

1. In the WebSphere Commerce Accelerator, go to the Marketing menu.
2. Select **Campaign Initiatives**. The Campaign Initiatives list displays.
3. Set up a condition for the under 29 group by doing the following:
  - a. Click **New**. The Campaign Initiative General Definition page of the Campaign Initiative wizard displays.
  - b. In the **Campaign Initiative name** field, type Hot Sale initiative - under 29.
  - c. In the **Initiative Classification** field, select **General**.
  - d. In the **Description** field, type a description of the initiative. For example, Suggestive selling by age on the new arrivals page.
  - e. In the **Campaign** field, select **Hot Sale**.
  - f. Click **Next**. The **Defining displayed dynamic content** page displays.
  - g. Select **Suggest specific products**.
  - h. Click **Find**. The Find Products page displays.
  - i. In the **Short description** field, type short summer dress. Click **Find**. A list of short summer dresses displays in the Search Results page.
  - j. Select the short summer dress that includes the word *product* in the SKU. then click **Add**. The **Defining displayed dynamic content** page displays with short summer dress in the list.
  - k. Repeat steps g through j twice, selecting sporty tank top and team shirt.
  - l. Click **Next**. The **Defining Target Customers** page displays.
  - m. Select **Target specific profiles**.
  - n. From the **Available customer profiles** list box, select **under 29** and click **Add**.

- o. Click **Next**. The **Defining Dates for Target Customers** page displays.
  - p. Select **Everyday**.
  - q. Click **Next**. The **Defining Target Customer behaviors** page displays. You will not target any customer behaviors.
  - r. Click **Finish** to save the new campaign initiative. The initiative is displayed in the Campaign Initiatives list.
4. Set up a condition for the over 29 group by doing the following:
    - a. Click **New**. The Campaign Initiative General Definition page of the Campaign Initiative wizard displays.
    - b. In the **Campaign Initiative name** field, type Hot Sale initiative - over 29.
    - c. In the **Initiative Classification** field, select **General**.
    - d. In the **Description** field, type a description of the initiative. For example, Suggestive selling by age.
    - e. In the **Campaign** field, select **Hot Sale**.
    - f. Click **Next**. The **Defining displayed dynamic content** page displays.
    - g. Select **Suggest specific products**.
    - h. Click **Find**. The Find Products page displays.
    - i. In the **Short description** field, type floral shirt. Click **Find**. A list of floral shirts displays in the Search Results page.
    - j. Select the floral shirt that includes the word *product* in the SKU. then click **Add**. The **Defining displayed dynamic content** page displays, with floral shirt in the list.
    - k. Repeat steps g through j twice, selecting **Knit long-sleeve shirt** and **Plain front cotton pants**.
    - l. Click **Next**. The **Defining Target Customers** page displays.
    - m. Select **Target specific profiles**.
    - n. From the **Available customer profiles** list box, select **over 29** and click **Add**.
    - o. Click **Next**. The **Defining Dates for Target Customers** page displays.
    - p. Select **Everyday**.
    - q. Click **Next**. The **Defining Target Customer behaviors** page displays. You will not target any customer behaviors.
    - r. Click **Finish** to save the new campaign initiative. The initiative is displayed in the Campaign Initiatives list.
  5. Click **Finish**.

## Schedule an e-Marketing spot for Hot Sales

1. From the **Marketing** menu, click **e-Marketing Spots**. The e-Marketing Spots list displays, containing the e-Marketing Spots currently defined for the selected store.
2. Select the check box to the left of the **NewArrivalsPage** e-Marketing Spot. Click **Schedule**. The Campaign Initiative Schedule list displays.
3. Click **New**. The Schedule Campaign Initiatives page displays.
4. From the **Selected Campaign** drop-down box select Hot Sale.
5. Add the Hot Sale initiative - over 29 and Hot Sale initiative - under 29.
6. Click **OK** to save the schedule assignment. The Schedule Campaign Initiatives page displays with the initiatives you have scheduled in the NewArrivalsPage e-Marketing spot.

## Register and shop at the store

After completing the campaigns and discounts, you will verify the changes you have made to the store. In order to do so, you should log on to the store and register as several different customers. For example, the first time you log on, register as a male customer over the age of 29. Then return to the home page, and ensure that you see the products you targeted: striped sweatshirt, walking shorts and weather jacket. Check out the hot sale items to ensure you see the products targeted for those over 29: floral shirt, knit long- sleeve shirt and plain front cotton pants. Purchase an item, to ensure that you get the 10 percent discount.

Then, close the browser, reopen it, and log on as a female customer. Return to the home page. You should see the summer nightgown, short skirt and short-sleeved summer dress. Don't forget to visit the new arrivals page. The products targeted to someone under 29 are the sporty tank top, team shirt, and short summer dress.

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## Part seven: Enabling auctions

For information on enabling auctions, see the WebSphere Commerce online help.

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## Part eight: Setting up WebSphere Commerce Payments for your store

For information on setting up WebSphere Commerce Payments, refer to the WebSphere Commerce online help.

If you have WebSphere Commerce Payments set up, and would like to test a payment, do the following:

1. Register and shop at the store.
2. Add an item to your shopping cart.
3. Checkout.
4. To complete your order, enter your credit card information. For the purposes of this test, enter the following:
  - a. From the **Credit card type** drop down list, select **Visa** (assuming it is in your WebSphere Commerce Payments account).
  - b. In the **Card number** field, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2005.
  - e. Click **Order now**. The Order confirmation page displays, stating the details of your order.

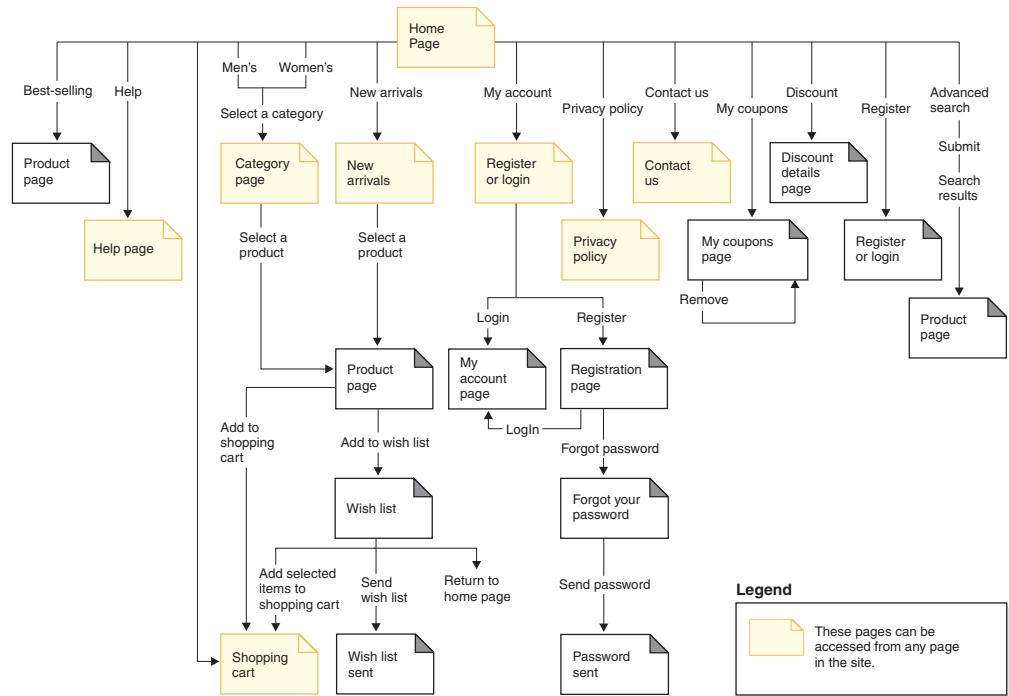
**Note:** If customers are using a double-byte language and type lengthy information into text fields, they may encounter an error due to the length of the entry exceeding what is allowed in that field. To correct this, you may want to add code to limit the UTF8 string length that customers type in.

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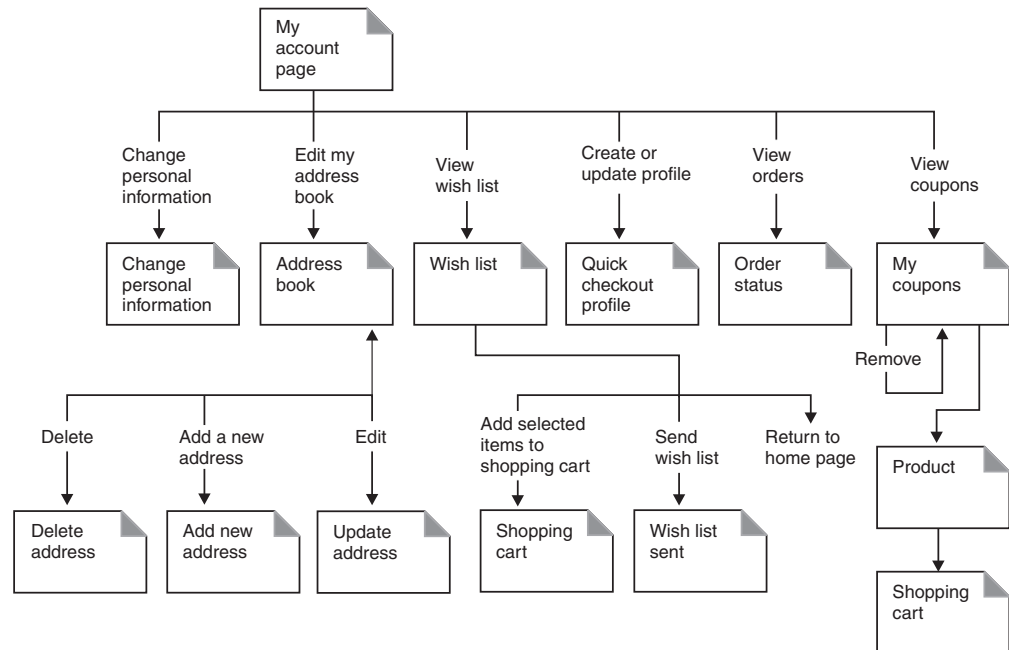
## FashionFlow store flows

The following diagrams show the basic store flow, account flow, and checkout flow for FashionFlow.

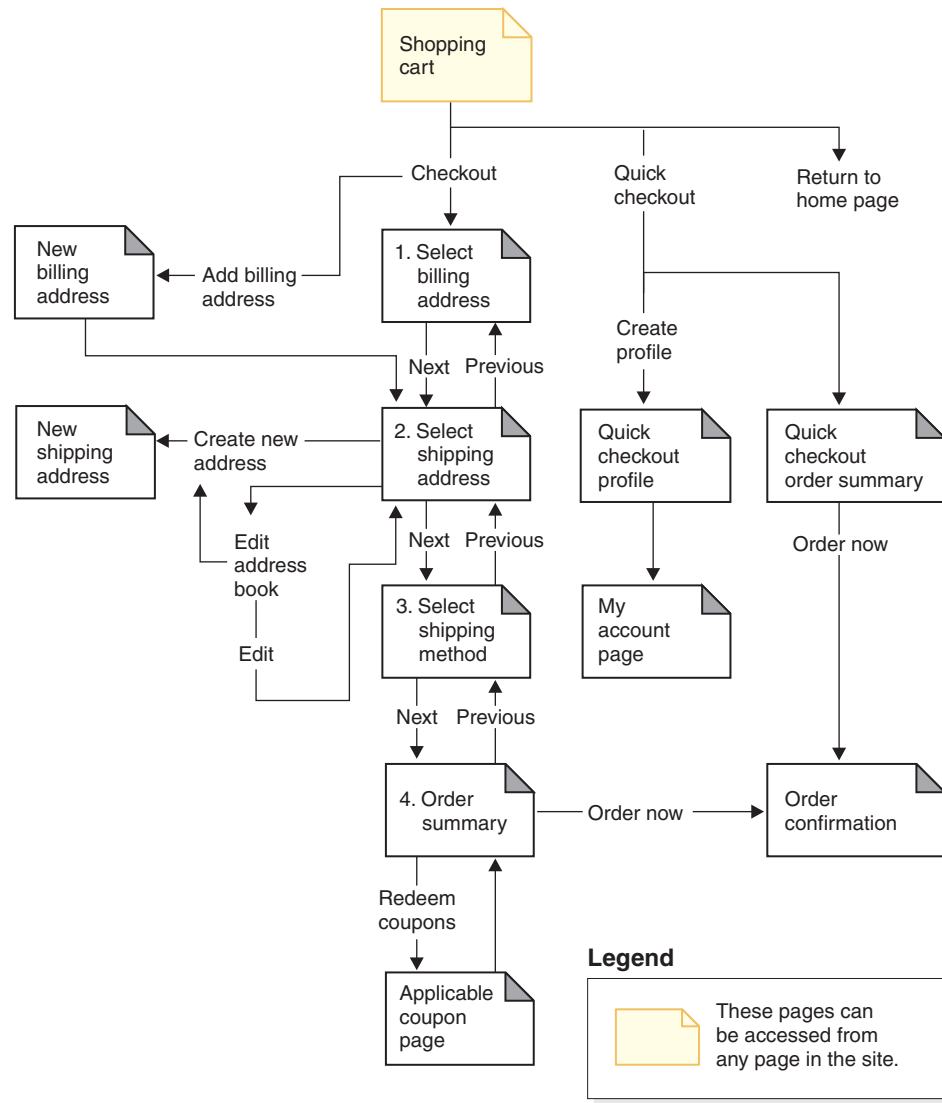
## FashionFlow store flow



## FashionFlow account flow

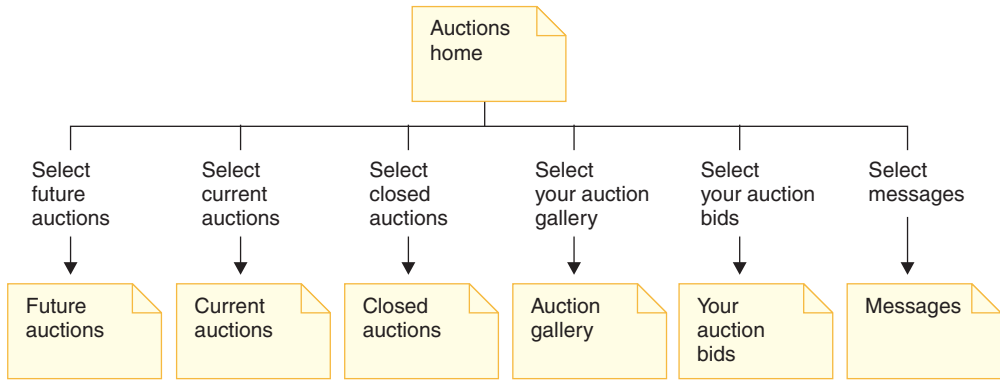


## FashionFlow checkout flow




The following diagrams show the basic auction flow, current auction flow, future auction flow, and closed auction flow.

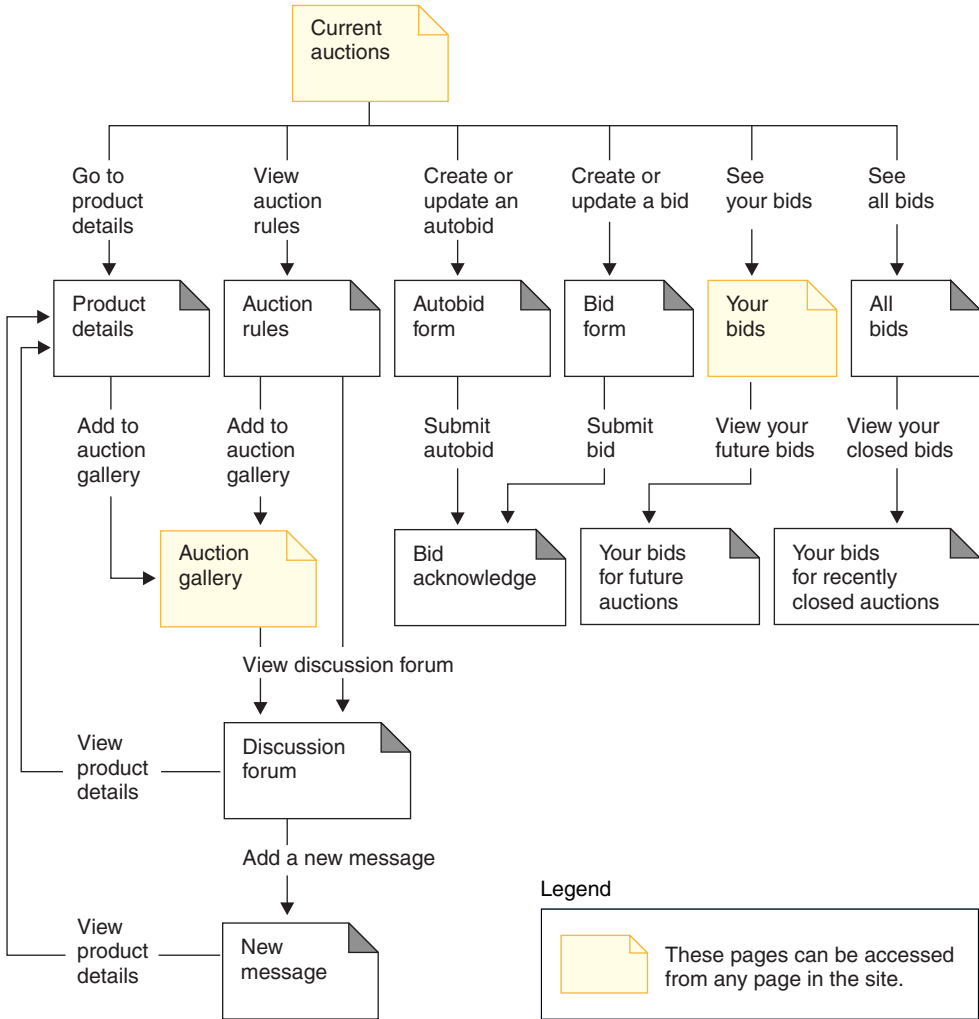
### Auctions flow




**Legend**

 These pages can be accessed from any page in the site.

### Current auctions flow

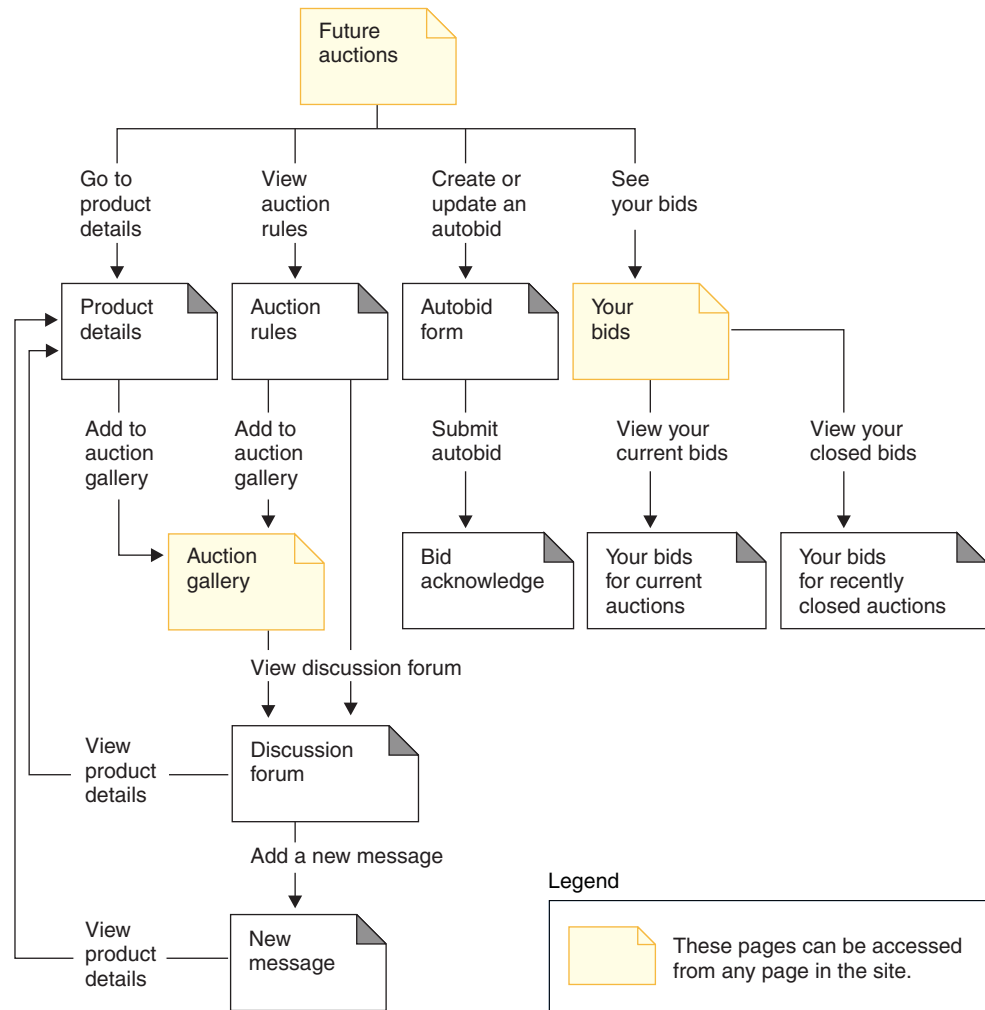


**Legend**

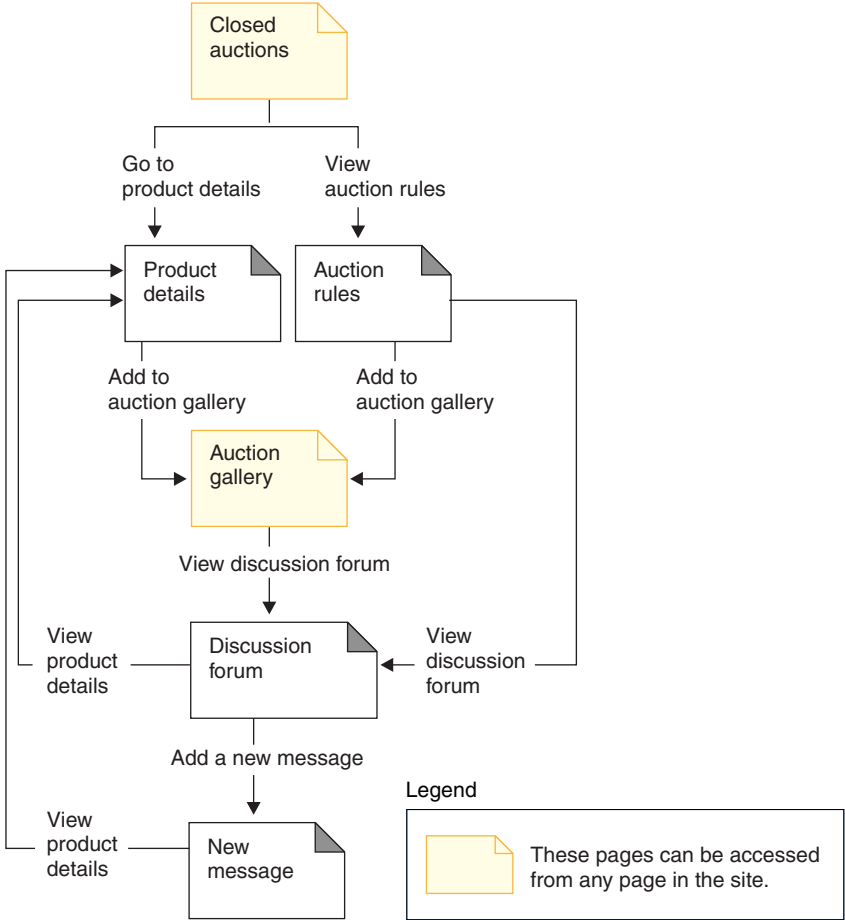
 These pages can be accessed from any page in the site.



## Future auctions flow



**Closed auctions flow**



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## Chapter 6. FashionFlow use cases

**Note:** These use cases apply to hosted stores (stores created using the Store Creation Wizard) except for the following:

- Guided Sell
- Setup e-mail address/receive e-mail option
- Update e-mail address/receive e-mail option for registered customer

---

### Home page

The home page acts as the storefront, and brings customers into your store.

#### Actor

Customer

#### Main flow

A customer enters the store URL in the Web browser. The system then displays the home page.

The home page includes the following:

Drop down menus leading to either "select a language", or "select a currency".

- A navigation bar with links to the following pages:
  - Home page
  - Advanced search
  - Shopping cart page
  - Registration page
  - Account page
  - Contact information page
  - Security and privacy page
  - Help page
- Links to primary or top-level categories. For each category the following information is displayed:
  - An image
  - Links to targeted products
    - If customers have specified their gender when registering, products targeted to the customers gender display. If not, a generic set of products displays.
    - For each product the following information is displayed:
      - An image
      - A short description

The customer clicks the image. Then, the system displays the corresponding page (A1, A2).

#### Alternative flow

**A1: Customer selects category**

When the customer selects a category, the system displays a category page as described in the *View product category use case*.

**A2: Customer selects product**

When the customer selects a product, the product page displays as described in the *Display product page use case*.

---

## Registration

The registration process allows customers to enter personal information in the database.

**Actor**

Customer

**Main flow**

The customer selects **Register**. The system then displays a page with the following fields:

- E-mail
- Password
- Verify password
- First name
- Last name
- Preferred language
- Preferred currency
- Age
- Gender

If the customer would like to receive e-mails about specials and features, he must check the "Send me e-mails about specials and featured clothing" box to indicate an interest, and then select the interest items listed.

The customer enters the appropriate information in the above fields, and selects **Submit**. The system creates a new customer in the system and saves the customer's information (E1, E2, E3).

The system prompts customers to manage their accounts following the process in the *Manage Personal Account use case*.

**Alternative flow**

None.

**Exception flows****E1: E-mail address already exists**

If the e-mail address already exists in the system, the system displays an error message asking the user to enter another e-mail address. The use case resumes from beginning.

**E2: Missing mandatory fields**

If any of the following fields (E-mail, Password, Verify password, First

name, Last name) are not completed, the system issues an error message. The use case resumes from beginning.

### **E3: Invalid password**

If the password does not match the verification password, the system issues a warning.

**Note:** The password entered must follow however it is set up in the tools, for example, be at least six characters, contain at least one digit and one letter, and must not contain the same character five times in total, or four consecutive times, or an error message is displayed. An error message is also displayed if the password is the same as the e-mail address.

---

## **Logon**

The logon process allows registered customers to access their accounts by typing their user name and password.

### **Actor**

Customer

### **Main flow**

The customer selects **My Account**. The system then displays a page with the following fields:

- E-mail address
- Password

Customers enter the appropriate information in the above fields, and select **Login**. The system ensures that customers e-mail addresses and passwords are correct and then allows the customer into their accounts. If customers forget their passwords, they select **Forgot your Password?** and alternative flow A1 is performed.

### **Alternative flow**

#### **A1: Forget your Password**

If customers forget their password, they select **Forgot your Password?**. The system then displays a page prompting the customers to enter their e-mail addresses. The customers type their e-mail addresses and click **Send me my password**. The system then sends the password to the e-mail address (E1).

### **Exception flows**

#### **E1: No matching e-mail address in the system**

If the system cannot locate a customer with the matching e-mail address, an error message displays.

If the customer attempts to login with the same user name and fails 6 times, the customer will be locked out. A message will be displayed noting that the account is locked, and that the customer must contact a store representative to re-activate it.

---

## Manage account

Customers manage their account through the account pages.

### Actor

Customer

### Main flow

The customer selects **My Account**. The system then displays the My Account page with the following options:

- Change personal information
- Edit my address book
- Create or update Quick Checkout Profile
- View wish list
- View orders
- View coupons
- Auctions

If the customer selects **Change personal information**, alternate flow A1: Change e-mail and password is performed.

If the customer selects **Edit my address book**, alternate flow A2: Edit address book is performed.

If the customer selects **Create or update profile** (the Quick Checkout profile), the Quick Checkout Profile page displays, as described in the *Create quick checkout profile use case*.

If the customer selects **View wish list**, the Wish list page displays, as described in the *View wish list use case*.

If the customer selects **View orders**, the Order Status page displays, as described in the *View orders use case*.

If the customer selects **View coupons**, the My Coupons page displays, as described in the *View orders use case*.

### Alternative flow

#### A1: Edit e-mail and password

The system prompts the customer to modify the e-mail address and password using the procedure described in the *Change personal information use case*. The use case resumes from the beginning.

#### A2: Edit address book

The system displays a page that lists all the address already added to the address book. Next to each address are two buttons: **Edit** and **Delete**. Below the list of addresses is an **Add a new address** button.

If the customer clicks **Delete**, the system deletes the corresponding address from the database and then displays a message indicating that the address was deleted properly. The alternate flow resumes from the beginning.

If the customer clicks **Edit**, the system prompts the customer to edit the address using the procedure described in the *Edit Address use case*. The

system then displays a message confirming that the address was updated properly, and the alternate flow resumes from the beginning. If the customer clicks **Add a new address**, the system prompts the customer to enter a new address using the procedure described in the (Add new address use case). This alternate flow resumes from the beginning.

#### Exception flows

None.

---

## Change personal information

Customers can change personal information, such as e-mail address and password.

#### Actor

Customer

#### Main flow

The customer clicks **Change Personal Information** (E1). The system displays the Change personal information page, which includes the following fields:

- **First name**, pre-filled with the current first name
- **Last name**, pre-filled with the current last name
- **E-mail**, pre-filled with the current e-mail address
- **Password**
- **Verify password**
- **Preferred language**
- **Preferred currency**
- **Age**, pre-filled with the age
- **Gender**, pre-filled with the gender
- change your selections for the interest e-mails, either check or uncheck

The customer alters the fields as needed. The password field can be left empty. If the customer chooses to leave the password field empty, the system does not modify the current password. The customer then selects **Submit**, and the system updates the e-mail address and password (E2). If the password field is empty, the system leaves the previous password unchanged.

#### Alternative flow

None

#### Exception flows

The password entered must be at least 6 characters, contain at least one digit, contain at least 1 letter, and must not contain the same character 5 times in total, or 4 consecutive times, or an error message is displayed. An error message is also displayed if the password is the same as the e-mail address, or if the customer decides to change the password, but the password is the same as the previous one. For more information see the related tasks below.

**E1: Customer not logged in**

Customers must be logged in to change their e-mail addresses and passwords. If customers are not logged in, the system prompts the customers to log in using the procedure described in the *Logon use case*. This use case then resumes from the beginning.

**E2: E-mail already exists for a different customer**

The entered e-mail address cannot match the e-mail address of any other existing customer. If the system finds a match it prompts the customer to select a different e-mail address. The use case resumes from the beginning.

**E3: Can not verify password**

The password entered must match the password specified as the verify password. Otherwise, the system displays the following error message: Password does not match the verify password, please try again. The use case resumes from the beginning.

---

## Add new address

Customers can add a new address to their address book.

**Actor**

Customer

**Main flow**

From the Address Book page, the customer clicks **Add a new address**. The system displays a page with the following fields:

- Nickname
- First name
- Last name
- Street address (composed of two text boxes)
- City
- State or Province
- ZIP code or Postal Code
- Country/Region
- Phone number

The customer types the information in the fields and clicks **Submit**. The system adds a new address to the address book (E1).

**Alternate flow**

None

**Exception flow****E1: Missing Mandatory Field**

If any of the following fields are missing, the system may issue an error message; required fields are language specific.

- First name
- Last name
- Street address



- City
- State or Province
- ZIP code or Postal Code
- Country/Region

If the nickname entered already exists in the customer's address book, the system will report an error message.

---

## Edit address book

This use case will describe what the functional flow of events are when a customer edits their address book.

### Pre-condition

The customer is a registered buyer and logged into the store.

### Basic Flow

1. The system displays the My Account page.
2. The customer clicks **Edit my address book** and is transferred to the Address Book page.
3. The customer clicks **Edit** under one of the addresses and selects an address from the address book to edit.
4. The system retrieves and displays the selected address details: nickname, first name, last name, street address, city, state or province, zip code or postal code, country or region.
5. The customer modifies the appropriate fields and clicks **Submit** to save the information.

### Post-condition

The system updates the address.

---

## Add item to the wish list

In FashionFlow, a wish list allows registered customers to add products to a list that they would like to order in the future. A wish list can be e-mailed to family or friends, who can then purchase the items as gifts for the customer. A wish list differs from a shopping cart in that customers plan to purchase the products in the shopping cart during the current shopping session.

### Actor

Registered customer

### Main flow

The customer views a product, prebuilt kit, or bundle (for more information see *Display product page use case*, *Display bundle page use case*, and *Display package page use case*) and then clicks **Add to wish list**. The system adds the product, bundle, or prebuilt kit to the wish list (E1) and then displays the wish list page, as described in *View wish list use case*.

### Exception flows

### **E1: Guest customer tries to add an item to the wish list**

If a guest customer tries to add an item to the wish list, the system displays the following message: To save items to your wish list, register, and then try again.

---

## **View wish list**

The customers can view and edit the products they have added to their wish list.

### **Actor**

Customer

### **Main flow**

Customers click **My Account**, and then **View wish list**. The system then displays a page showing the contents of the wish list. A list of products in the wish list is displayed (E1). For each product, bundle, or prebuilt kit in the wish list, the following information is displayed.

- Short product description
- Attribute and value of the item, for example, size and color values
- Unit price
- **Remove** link

The system also displays the following items in the page:

- **Return to shopping** button
- **Add selected items to shopping cart** button.
- **Send wish list** button
- **E-mail address** field (To: / recipient)
- **E-mail message** field
- **From:/sender Name**
- **E-mail address**

To delete an item from the wish list, the customer, clicks **Remove**. The system completes A1, Remove item.

To send the wish list to friends and family via e-mail, customers enter the recipients E-mail addresses in the **E-mail address** field and click **Send wish list**. The system completes A2, Send wish list. Customers can send an e-mail message using the **E-mail message** field. Customers need to specify their name and can optionally specify their e-mail address. Registered customers have the **Name** field pre-filled.

To add items in the wish list to the shopping cart, customers select each item to add to the shopping cart and click **Add selected items to shopping cart**. The system completes A3, Add to cart.

### **Alternative flow — A1: Remove item**

To delete an item from the wishlist, customers click **Remove** for the item. The system removes the item from the wish list. The use case resumes from the beginning.

### Alternative flow — A2: Send wish list

To send the wish list to friends and family via e-mail, customers enter the recipients e-mail addresses in the **E-mail address** field. To send the wish list to more than one friend, each e-mail address must be separated with a comma, for example: info@fashionflow.com, wcs@fashionflow.com. The customers then click **Send wish list**.

### Alternative flow — A3: Add to cart

To add an item in the wish list to the shopping cart, customers select each item to add, then click **Add selected items to shopping cart**. The system adds all selected items to the shopping cart, then displays the shopping cart, as described in the *Display shopping cart use case*.

### Exception flows — E1: Empty wish list

If there are no items in the wish list, the system displays the following message: Empty wish list.

The use case terminates.

---

## Display bundle page

The bundle page displays more details about the products or items that compose a bundle.

### Actor

Customer

### Main flow

The customer selects a bundle in the category page. The system then retrieves the bundle information from the database and then displays a page with detailed information about the selected bundle. The bundle page displays the following information:

- Short description
- Long description
- Full-sized image of the bundle
- Images of the products or items that compose the bundle
- Price for each product or item in the bundle
- A list of attributes (size and color) if the products that compose the bundle have variations, and a list of values for each attribute (red and blue for color and Large and X-Large for size)

The customer then selects the appropriate values for each attribute, selects the quantity, and clicks **Add to shopping cart**. The system adds the bundle to the shopping cart (E-1), and displays the Shopping Cart page as described in the *Display shopping cart use case*.

**Note:** The default quantity is 1. Customers can modify the quantity after the bundle has been added to the shopping cart.

The customer also has the option of clicking **Add to wish list**. If the customer does so, the system adds the bundle to the wish list and displays the wish list as described in the *Add item to the wish list use case*.

#### **Alternative flow**

None

#### **Exception flows**

None

---

## **Package display page**

The package display page displays more details about the products or items that compose the prebuilt kit (Packages are now called prebuilt kits).

#### **Actor**

Customer

#### **Main flow**

The customer selects a prebuilt kit in the category page. The system retrieves the prebuilt kit information from the database and then displays a page with detailed information about the selected prebuilt kit. The display packages page displays the following information:

- Short description
- Long description
- Images of the products or items that compose the prebuilt kit
- Price for the prebuilt kit
- A list of attributes (size and color) if the products that compose the prebuilt kit have variations, and a list of values for each attribute (red and blue for color and Large and X-Large for size)

The customer then selects the appropriate values for each attribute, and the quantity, and clicks **Add to shopping cart**. The system adds the prebuilt kit to the shopping cart (E-1), and displays the Shopping Cart page as described in the *Display shopping cart use case*. The default quantity is one.

**Note:** Since all items in a prebuilt kit cannot be sold separately, a prebuilt kit counts as one item in the shopping cart.

The customer also has the option of clicking **Add to wish list**. If the customer does so, the system adds the prebuilt kit to the wish list and displays the wish list.

#### **Alternative flow**

None

#### **Exception flows**

##### **E1: Attribute is not selected**

For products with a variety of attributes, the customer must select a value

for each attribute. If the customer does not select a value, the system selects a default value and adds the prebuilt kit to the shopping cart or wish list.

---

## View product category

Catalog group pages display a list of subcategories and products. Catalog group pages help customers navigate through the products. The beginning catalog group pages lead to broad areas, and subsequent catalog group pages narrow the search. There are usually three types of catalog group pages:

- Pages that display subcategories within a parent category
- Pages that display products within a subcategory
- Pages that display both subcategories and products

### Actor

Customer

### Main flow

Top-level product categories are listed in the Home page, for example, Men's Fashion, Women's Fashion and New arrivals. When the customer clicks on Men's Fashion or Women's Fashion, the system retrieves the subcategories within the selected category from the database, and displays the corresponding category information. When the customer clicks on the New arrivals link, new products are displayed. The following information is displayed for each category and product:

- A thumbnail image (products only).
- The name of each category or product.
- A brief description to identify product.
- The price of the product.

The category pages also include a featured special, in the form of a prebuilt kit or bundle. The featured special includes an image and a brief description of the prebuilt kit or bundle.

The customer clicks the thumbnail image or the name. Then, the system displays the corresponding page (A1, A2, A3, A4).

### Alternate flow

#### A1: Customer selects category

When the customer selects a category, the system displays another category page by resuming this use case from the beginning.

#### A2: Customer selects product

When the customer selects a product, the product page displays as described in *Display product page use case*.

#### A3: Customer selects bundle

When the customer selects a bundle, the bundle page is displayed as described in *Display bundle page use case*.

#### A4 Customer selects prebuilt kit

When the customer selects a prebuilt kit, the display package page is displayed as described in *Display package page use case*.

## Exception flows

None

---

## Guided Sell

**Purpose:** The Guided Sell page displays a list of questions and their corresponding answers that customers can select from. Each answer determines the next question that the customer will see. Based on the customer's answers to the questions, a list of products are suggested and listed.

**Actors:** customer (both registered and guest)

**Preconditions:** customer can be in any store pages

**Postconditions:** System returns a list of item results (we choose to list only items in the results, not products/prebuilt kit/bundle)

Actor action, main flow:

1. The customer clicks **Guided Sell** in the sidebar.
2. System displays the Guided Sell Welcome page. This first page contains a welcome message/instruction, and asks the customer to choose what category (i.e. Men's or Women's) he/she would like to explore.
3. The customer selects the category that he would like to explore.
4. The system displays the first Guided Sell Question/Answers page. This page contains the first question, and the corresponding answers that customer can choose.
5. The customer selects an answer.
6. After the customer clicks on the answer, system displays the subsequent Guided Sell question/answers page. This page contains two sections: a Question/Answers section, and a History section. The Question/Answers section shows the question, and the corresponding answers that customer can choose. If customer clicks on an answer, and if there are further predefined questions, system will show another Guided Sell question/answers page. If customer clicks on an answer, and there are no more questions to ask, system will show all the suggested items in the format of product comparison. At the top left hand corner, there is a Product comparison link in the page. If customer clicks on this Product comparison link, system will display a list of products and items, based on the questions that the customer has answered so far. The History section is displayed at the bottom of the page. It lists the previous questions and the corresponding answers that the customer has chosen so far.

**Alternate flow:** The customer clicks on a question in the history section. If the customer clicks on a question in the history section, the system will display the Guided Sell question/answers page for that previous question. Then, the customer can choose another answer. If the customer clicks on an answer, and if there are further predefined questions, system will show another Guided Sell question/answers page. If the customer clicks on an answer, and there are no more questions to ask, the system will show all the suggested products in the format of a product comparison.

**Exception Flow:**

none

---

## Cross-sell, up-sell, and accessory

**Purpose:** customer clicks on Product in either the Home Page or Category pages. It shows the cross-sell, up-sell, or accessory products if they are set up. For example: accessory from plain front cotton pants to classic belt, up-sell from Women's pajamas to Silk pajamas, cross-sell from Men's Plaid boxers to Pajamas.

**Actors:** customer (both registered and guest)

**Preconditions:** Cross-sell, up-sell or accessory is setup for that product. A product page is displayed.

**Postconditions:** Cross-Sell, up-sell or accessory is displayed in the product page.

**Actor action, main flow:**

1. The customer clicks on a product.
2. The Product page is displayed with more details about a product. If a cross-sell, up-sell or accessory is set up for that product, in the product page, the cross-sell, up-sell or accessory product(s) are listed. The following information is displayed for each cross-sell, up-sell or accessory product: a thumbnail image, the name of each product, and the product's offer price. The thumbnail image and the name will be a link to the corresponding product page. A sentence is displayed indicating that these products are cross-sell, or up-sell, or accessory. For example: "To complete your outfit, consider adding:" (for cross-sell).
3. The customer clicks on the cross-sell, or up-sell, or accessory product
4. If a product is clicked, a product page is displayed

**Alternate flow:** customer clicks on a product with no cross-sell, up-sell or accessory being set up. A regular product page is displayed with more details about a product. See the *Display Product Page use case*.

**Exception Flow:** none

---

## Display cross-sell in a category page

**Purpose:** Category page displays a list of subcategories and products. If cross-sell is setup, it also shows the cross-sell category. For example: cross-sell from Mens Pants and shorts to Shirts and tops.

**Actors:** customer (both registered and guest)

**Preconditions:** Cross-sell is setup for that category. A subcategory page is displayed.

**Postconditions:** Cross-Sell is displayed in the subcategory page

**Actor action, main flow:**

1. The customer clicks on a category link.
2. The system retrieves from the database the subcategories and products within the selected category, and displays the information of those categories and products using the *Category display use case*. If cross-sell is set up for that category, in the category page, the name of each cross-sell category is listed. Also, there is a sentence indicating that these are in the cross-sell category:

"Mix and match to add to your look:" The name will be a link to the corresponding subcategory display page.

**Alternate flow:** The customer clicks on a subcategory with no cross-sell being set up. A regular subcategory page is displayed.

**Exception Flow:** none

---

## View discount banner advertisements

**Purpose:** customers view the banner advertisements of different promotions in the store home page.

**Actors:** customer (both registered and guest)

**Preconditions:** Banner advertisements are setup for each type of discount.

**Postconditions:** Banner advertisements are shown in the home page

**Actor action, main flow:**

1. The customer goes to the home page.
  2. The home page displays 4 banner advertisements: 1) "Free Shipping! click for details", 2) "Get a free evening bag with purchase of evening dress", 3) "Buy a women's sporty tank top and get the next one at 30% off" 4) "Spend over \$150 and get 15% off"
  3. The customer clicks on the banner advertisements: "Free Shipping! click for details"
  4. The system displays the Free shipping details page showing the details about how you can have free shipping, and the condition
  5. The customer clicks on the banner advertisements: "get a free evening bag with purchase of evening dress"
  6. The system displays the details page showing this discount information, such as instructions, or discount conditions. In the details page, the words "black evening bag" will link to the Item Display page, and the word "evening dress" will link to the Product Display page of the evening bag.
  7. The customer clicks the "evening bag" link, and the system displays the Item Display page of the gift, that is, a black evening bag. In this gift display page, it will show a description saying something like "Get a free evening bag with the purchase of an evening dress". The Item Display page also links to the details page. Similarly, if the customer clicks the "evening dress" link, the system displays the Product Display page of the evening dress. In this product display page, it shows a description saying something like "Get a free evening bag with the purchase of an evening dress". The Product Display page will also have a link to the details page.
- Note:** The gift is a "black" evening bag, which is a child item of product "evening bag". This black evening bag is displayed in the product page with a specific attribute, "color=black".
8. The customer clicks on the banner advertisements: "buy a women's sporty tank top and get the next one at 30% off".
  9. The system displays the Details page showing this discount information, such as instructions or discount conditions. For example, the customer is eligible for one tank top only at 30% off even if the customer buys many tank tops.



- The tank tops need to have the same attributes in order to be eligible. In the details page, the word "sporty tank top" will link to the Product Display page.
10. The customer clicks on the link, and the system displays the Product Display page of the women's sporty tank top. In this Product Display page, it shows a promotion description, such as "buy a sporty tank top and get the next one at 30% off". The Product Display page will also have a link to the Details page. The product display page also shows this discount detailed information, such as instructions, or discount conditions.
  11. The customer clicks on the banner advertisements: "Spend over \$150 and get 15% off"
  12. The system displays the details page showing the instructions, discount conditions, etc. This page will have a 'Home page' button to go back to the home page.

**Alternate flow:** none

**Exception Flow:** none

---

## Get free shipping above \$100

**Purpose:** customers can get free shipping for regular mail if they spend over \$100.

**Actors:** customer (both registered and guest)

**Preconditions:** Order total is more than \$100.00

**Postconditions:** Free shipping is offered.

**Actor action, main flow:**

1. The customer clicks **Add to shopping cart** from the Product Display page.
2. The system displays the shopping cart page using the *Display Shopping Cart use case*. The Shopping cart page will have a link to the home page, which shows all the discount banner advertisements.
3. The customer clicks **Checkout**.
4. Checkout shopping cart use case is used. In the select shipping method page, the promotion description of free shipping is displayed. If customer selects regular mail shipping method, he/she will get a discount. Otherwise, there will be no discount. In the Order Summary page, the shipping charge will be zero if regular mail is selected.

**Alternate flow:** none

**Exception Flow:** none

**Note:** Whether the total amount is qualified for free shipping is based on the total after other product-level discounts.

---

## Buy 1 item, get next item 30% off

**Purpose:** customers buy a women's sporty tank top and get the next one at 30% off.

**Actors:** customer (both registered and guest).

**Preconditions:** customer buy more than one women's sporty tank top.

**Postconditions:** customer get a sporty tank top 30% off.

**Actor action, main flow:**

1. The customer clicks **Add to shopping cart** from the Product Display page.
2. The system displays the shopping cart page using the *Display Shopping Cart use case*. If the customer buys more than one sporty tank top, below the second tank top total (that is, the order item's total), the system will display the discount for the tank top (such as a discount of \$11.07). Also, the system displays a discount description, such as "buy a sporty tank top and get the next one at 30% off" below the order item description.
3. The customer clicks **Checkout**.
4. The *Checkout shopping cart use case* is used. If a customer purchases two or more identical sporty tank tops, he will get one of those items at 30% off. In the Order Summary page, below the second sporty tank top's total (that is, the order item's total), the system will display the discount for the sporty tank top (such as a discount of \$11.07).

**Alternate flow:** none

**Exception Flow:** none

---

## Get a free gift with the purchase of an evening dress

**Purpose:** customers can get a free black evening bag when they buy evening dress

**Actors:** customer (both registered and guest)

**Preconditions:** customer must buy the evening dress.

**Postconditions:** a free evening bag is offered.

**Actor action, main flow:**

1. The customer clicks **Add to shopping cart** from the Product Display page.
2. The system displays the shopping cart page using the *Display Shopping Cart use case*. A black evening bag will be displayed in the shopping cart as an order item. For the quantity field, instead of a text box, the quantity value will be displayed without allowing the customer to update the quantity. Below the order item's total, the system will display "FREE" for this order item. Below the order item's description, the system displays the discount description, such as "get a free evening bag with purchase of an evening dress".
3. The customer clicks **Checkout**.
4. The *Checkout shopping cart use case* is used. In the Order Summary page, the free evening bag will be displayed as an order item. Similar to the shopping cart page, below the order item's total, system will display "FREE" for this order item.

**Alternate flow:** Some order items are available and some order items are not. The customer splits the order into two, and the evening bag and the evening dress are in two separate orders. In the product availability page, there are three options. Two of the options are related to splitting the order. The description will be something similar tot: "I understand that I may have to pay another shipping charge at this time, and some discounts may not be available." In this case, the evening bag will be not be free, after the order is split.

**Exception flow:** The customer clicks **Add to Shopcart** to add an evening dress, but the black evening bag is out of inventory.**Available To Promise (ATP) enabled:** If the black evening bag is out of inventory and ATP is enabled, the bag will still be added to your shopping cart. In the Product Availability page, it will show the availability date of the free item.**ATP disabled:** If black evening bag is out of inventory and ATP is disabled, the bag will not be added to your shopping cart. A message is displayed saying that the free gift is not available.

---

## Spend \$150, get 15% off order

**Purpose:** customers can get a 15% off their order when they spend \$150.00.

**Actors:** customer (both registered and guest)

**Preconditions:** customer spends \$150.00

**Postconditions:** customer gets 15% off order

**Actor action, main flow:**

1. A customer has a total of over \$150 (USD) in his order.
2. The customer then gets a 15% discount off the total purchase price before taxes. If the order is over \$150, the shopcart page will show a discount description, such as "spend over \$150 and get 15% off" and show a discount of \$35.34 below the shopping cart subtotal, for this order level discount. This discount will be shown on the Order summary page. A separate line above the subtotals showing the discounts will be displayed.

**Note:** If a coupon is applied to the order, whether the total amount is qualified for the 15% discount is based on the total after the coupon adjustment.

**Alternate flow:** none

**Exception Flow:** none

---

## Set up e-mail address/receive e-mail option

**Purpose:** Register and select whether to receive e-mails based on interest. Options are Men's Fashion, Women's Fashion, and Specials.

**Actors:** Guest customer

**Preconditions:** One default e-mail campaign is set up for the store, target for user profiles that have interests in Men's Fashion, Women's Fashion, or specials. E-mail accounts for inbound and outbound messages are set up in the Administration Console. A guest customer is in the new registration page.

**Postconditions:** The customer provides his e-mail address and selects interests. If he picks up any of the three interests, he will get e-mails for each of the interest when the e-mail activity is scheduled next time.

**Actor action, main flow:**

1. The customer fills in the e-mail field in the new registration page in a@b.c format.
2. E-mail address appears in the form.
3. The customer checks the "I would like to receive e-mails" check box.
4. The customer selects any of the three interests: "Men's Fashion" and/or "Women's Fashion" and/or "Specials" in "Please choose your interests" multiple choices (check boxes).
5. Zero or more check boxes are checked, to a maximum of three.
6. The customer fills in other fields in the registration page and clicks **submit**.
7. The registration is successful. If Men's Fashion is checked, the customer will get an e-mail containing description of Dress Pants. If Women's Fashion is checked, the customer will get an e-mail containing description of Evening Dress. If Specials is checked, the customer will get an e-mail contain all the discounts (free shipping, free gift, and so on). All e-mails are separate.

**Actor action, alternate flow:**

1. The customer fills in the e-mail field in the new registration page in a@b.c format.
2. The e-mail address appeared in the form.
3. The customer does not check "I would like to receive e-mails" check box.
4. The customer selects zero or more of the three interests: "Men's Fashion", "Women's Fashion", or "Specials" in the "Please choose your interests" check boxes.
5. The customer fills in other fields in the registration page and click **submit**.
6. The registration is successful and customer will not receive e-mail newsletters.

**Exception flow:** none

---

## Update e-mail address/receive e-mail option for registered customer

**Purpose:** Update personal e-mail address or change interests or unsubscribe.

**Actors:** Registered customer

**Preconditions:** One default e-mail campaign is set up for the store, target for user profiles that have interest in Men's Fashion, Women's Fashion, or Specials. A registered customer logged in and is in the Update Personal Information page.

**Postconditions:** The customer updates his e-mail address and changes the interests. If he chooses one or more interests, he will get e-mails accordingly. If he unchecks "I would like to receive e-mails." boxes, no e-mails will be sent to this customer when the e-mail activity is scheduled next time.

**Actor action, main flow:**

1. The customer updates the e-mail field in the Update Personal Information page in a@b.c format.
2. The e-mail address appeared in the form.

3. The customer does not check "I would like to receive e-mails" check box.
4. The customer fills in other fields in the registration page and clicks **submit**.
5. If none of the three interests are selected, no e-mail will be sent out to this customer when the e-mail activity is scheduled.

**Exception flow:** none

**Issue:** Currently, the registration command does not check whether the e-mail format is valid. So, if the e-mail is wrong, the customer will not receive the e-mail.

---

## Display product page

The product page displays more details about a product.

### Actor

Customer

### Main flow

The customer selects a product in the category page. The system then retrieves the product information from the database and displays a page with detailed information about the selected product. The Product page displays the following information:

- Product name.
- Detailed description.
- Price.
- Full-sized image of the product.
- A list of attributes (size and color) if the product has variations, and a list of values for each attribute (red and blue for color and Large and X-Large for size).
- Quantity box to enter the quantity (default is 1).

The customer then selects the appropriate values for each attribute and clicks **Add to shopping cart**. The system adds the selected item in the shop cart, and displays the shopping cart page as described in the *Display shopping cart use case*.

The customer has the option of clicking **Add to wish list**. If the customer does this, the system adds the prebuilt kit to the wish list and displays the wish list as described in the *Add item to the wish list use case*.

### Alternative flow

None

### Exception flows

None

---

## Display shopping cart

Customers can view and edit the products they have selected to purchase through the shopping cart.

### Actor

Customer

### Main flow

The customer clicks **Shopping cart**. The system then displays a page showing the contents of the shopping cart. A list of products in the cart is displayed. For each such product the following information is displayed.

- Quantity
- Short product description
- Attribute name and attribute value pairs of the item, such as size and large.
- Unit price
- Total price

The system also displays the total cost of the order before tax and shipping.

If the customer clicks **Update totals**, A1: Update totals is performed.

If the customer clicks **Remove**, A2: Remove an item from the cart is performed.

If the customer clicks **Checkout**, A3: Update cart and checkout is performed.

If the customer clicks **Return to shopping**, the system displays the same page from where the customer came to the shopping cart page. The use case terminates.

If the customer clicks **Quick checkout** the system displays the Quick checkout: Order summary page as described in the *Quick checkout use case*.

### Subflows

#### A1: Update totals

To update the quantity of any item, the customer types the new quantity in the text box, then clicks **Update totals**. The system updates the quantity of the items in the shop cart. If the new quantity of an item is zero, the item is removed from the cart.

#### A2: Remove an item from the cart

To delete an item from the cart, the customer clicks **Remove item** for the item. The system removes the item from the cart.

#### A3: Update cart and checkout

The system updates the quantity of the items in the shop cart and initiates the checkout process. See the *Checkout shopping cart use case*.

### Exception flows

#### E1: Empty shopping cart

If there are no items in the shopping cart, the system displays the following message: Your cart is empty.

If an invalid number is entered into the quantity field such as a character, the shopping cart page will be re-displayed with an error message.

---

## View orders

Customers can track and view the status of their order.

### Actor

Customer

### Main flow

The customer clicks **My Account** and then **View orders**. The system displays the Order Status page, which lists all of the orders placed by the customer. If the customer has not placed any orders, E1: No orders found is performed.

The following information is displayed for each order:

- Order number (linked to the Order Details page)
- Order date
- Order status
- Total amount

To find out more information about the order, the customer can click the order number. The system displays the Order Details page. The Order Details page displays the following information about each product in the order:

- Quantity
- Short product description
- The attributes (size and color) and values for each attribute (red and blue for color, and Large and X-Large for size)
- Unit price
- Total price
- Shipping date for the whole order
- Tracking ID numbers

### Exception flows

#### E1: No orders found

If the system cannot find any orders associated with this customer, the system displays an error message stating:

There are no orders foundThe customer can then click **Return to Home Page** or **My Account**.

---

## Create quick checkout profile

In order for registered customers to use the quick checkout feature, they must first create a quick checkout profile.

**Actor:** Registered customer

### Main flow

The customer clicks **My Account**, then **Create or update profile** to initiate the use case.

The system displays the Quick Checkout Profile page.

1. Billing address, which includes the following fields:

- First name
- Last name
- Street address
- City
- State/Province
- ZIP code/Postal code
- Country/Region
- Phone number

**Note:** If a default billing address already exists, the system pre-fills the page.

2. Shipping address, which includes the following fields:

- First name
- Last name
- Street address
- City
- State/Province
- ZIP code/Postal code
- Country/Region
- Phone number

**Note:** If a default shipping address already exists, the system pre-fills the page.

The shipping address also includes a **same as billing address above** checkbox. If the checkbox is selected, the shipping address will be the same as the billing address.

3. Available shipping methods. Each shipping method includes the following:

- Name of the shipping method
- Details of the shipping cost
- Delivery time

**Note:** The last shipping method selected by the customer is selected by default.

4. Payment information, including:

- Credit card type
- Card number
- Expiration month
- Expiration year

The customer enters or edits the information, then clicks **Submit**. The system saves the information, adding the address information as described in the *Add new address use case*. The system then displays the My Account page.



---

## Quick checkout

Customers can complete an order without entering shipping and billing information if they have previously created a quick checkout profile.

**Actor:**Customer

### Main flow

Once a customer has added a product to the shopping cart, they click **Quick checkout** to initiate the use case. The system then displays the Quick Checkout: Order summary page. For every item in the shopping cart, the following information displays:

- Quantity
- Short description of the product
- Unit price
- Total price

The Quick Checkout: Order summary page also includes the following information about the order:

- Subtotal
- Discounts if any
- Total taxes. Multiple taxes will be displayed separately.
- Duties if any.
- Shipping cost including the shipping method
- Grand total
- Billing address
- Shipping address

The system prompts the customer to enter the following payment information:

- Credit card type
- Card number
- Expiration month
- Expiration year

**Note:** If the customer created credit card information in the Quick checkout profile, as described in *Create quick checkout profile use case*, the payment information field will be pre-filled.

The customer reviews the order summary and clicks **Order Now**. The system completes the order and displays an Order confirmation page.

**Alternate flow:**None

### Exception flows

#### E1: Customer doesn't have a quick checkout profile

The customer must create a quick checkout profile as described in *Create quick checkout profile use case*, before completing a quick checkout. If the system cannot find the billing address, shipping address, or shipping method, it displays an error message telling the customer to create a quick checkout profile.

**E2: Customer is not registered**

If a guest customer tries to use quick checkout, the system displays an error message telling the customer to register and create a quick checkout profile before using the quick checkout option.

**E3: Invalid credit card information**

If the credit card number entered in the quick checkout profile is invalid or expired, the system displays an error message.

---

## Checkout shopping cart

Customers check out and submit an order when they pay for products listed in their shopping carts.

**Actor:** Customer

**Main flow**

The customer clicks **Checkout** to initiate the use case.

The system displays the Billing Address page. If the customer has at least one address in the address book, the system prompts the customer to select one of the addresses from the address book as the billing address. The customer can select an address or click **Create new address**. If the customer clicks **Create new address**, a new address is added using the *Add new address use case*. The customer then selects an address. The system sets up the selected address as the billing address for the order. If the customer does not have any addresses in the address book, A1 Add Billing Address is performed.

The system displays the Shipping Address page. A list of addresses in the address book displays. If the customer finds the appropriate shipping address in the list, the customer selects the address. Otherwise, the customer clicks **Create New Address** and adds a new address using the (Add new address use case). The system sets up the selected address as the shipping address of the order.

The system displays a list of shipping methods appropriate for the shipping address. The following information is displayed for each shipping method:

- Short description
- Cost of shipping:
  - Fixed shipping cost per order
  - Shipping cost per item ordered
- Approximate delivery time

The customer selects the shipping method. The system sets the selected method as the shipping method of the order.

**Note:** the shipping address and shipping method are specified for each order item.

The system displays the availability of each item in the order, as well as several choices for shipping the items based on their availability. For each product in the order the system displays:

- Quantity
- Short product description
- Attribute values (for example, size: x = large; color: blue)

- Expected availability date based on future inventory
- Remove button (to remove the item from the order)

If some items are not in stock, while others are, Product Availability page will be displayed. The customer chooses one of three shipping preferences:

- Option 1, wait until the entire order is ready before shipping. The system shows the expected availability date of the whole order.
- Option 2, ship the available items now and ship the rest later.
- Option 3, ship the available items now and leave the rest in the shopping cart for purchase at a later date.

The customer then selects the shipping preference for the order.

**Note:** If all the items are available the customer will not see the availability date for each item.

As well as displaying the product information, the system also displays the details of the order information. For each item in the order the system displays:

- Short product description
- Attribute values (for example, size: x = large; color: blue)
- Quantity
- Unit price
- Total price
- The system also displays:
  - Billing address
  - Shipping address
  - Subtotal (total cost of all products ordered)
  - Discounts, if any
  - Total tax, if any (multiple taxes should be displayed separately)
  - Duties, if any
  - Shipping cost including the shipping method
  - Grand total (what the customer will be charged)
- Estimated shipping date (displayed at the top)

**Note:** Shipping address and shipping method are shown for each item in the order.

The system prompts the user to enter the credit card information. The following information is requested:

- Credit card type (for example, Visa(R) or MasterCard(R))
- Card number
- Expiration month
- Expiration year

The customer enters credit card information and clicks **Order Now**. The system stores the payment information (E1) and displays a confirmation page with the following information about the order:

- Order number
- Sub total (total cost of all products ordered)

- Total tax
- Shipping
- Discounts, if any
- Grand total

The customer prints out the page for future reference.

#### **Alternative flow**

##### **A1: Add billing address**

The customer is prompted to add a new address. The customer enters an address using the *Add new address use case*. The system sets up the new address as the billing address for the order. The use case continues.

#### **Exception flows**

##### **E1: Invalid credit card number**

The system checks the validity of the credit card number. If the check fails, the system displays an error message stating:

Invalid credit card number and prompts the customer to re-enter the information. The use case continues.

##### **E2: Credit card expired**

If the expiry date of the credit card is earlier than the current date, the system displays an error message. The use case resumes from the beginning.

---

## **Subcategory page troubleshooting**

When you create a product in FashionFlow, ToolTech, Commerce Plaza, or Supplier Marketplace, you must specify a short description for it. When the subcategory page lists the product, the JSP file takes the short description from the database. If the short description is not specified, the subcategory page will not see the description of the product in the list.

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## Chapter 7. FashionFlow tutorials

**Note:** These tutorials apply to hosted stores (stores created using the Store Creation Wizard) except for the following:

- Guided Sell
- Creating and receiving e-mail options
- Using Product Exploration and Product Comparison

---

### Creating and using coupons

#### Demonstrates

This tutorial illustrates the following features of FashionFlow:

- Creating a coupon promotion in WebSphere Commerce Accelerator
- Registration
- Quick checkout profile
- Regular checkout
- Adding a coupon to your coupons list
- Redeeming a coupon

#### Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. You must also enable the quick checkout, registration, and coupons. For more information, see *Publishing a store archive from the Administration Console* and *Changing store flows using WebSphere Commerce Accelerator* in the WebSphere Commerce online help.

#### Creating coupons

In the following exercise, you will use the WebSphere Commerce Accelerator to set up coupon features.

To set up coupons for your store, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Next, you want to create a coupon promotion.
  - a. From the **Merchandise** menu, click **Coupon Promotions**. The Coupon Promotion window displays, containing a list of the currently defined coupon promotions.
  - b. Select **New...** to create a new coupon promotion. You are now on the Coupon Promotion General Information page.
  - c. In the Name text box, type Coupon Promotion 03.
  - d. In the Description text box, type a description of the coupon that you are offering. You type 20% off order.
  - e. Now, you have to determine when this coupon will be in effect. You can either select for it to always be in effect, or you can determine a specified time period. If you select a **specified time period**, you must type the start date, end date, start time, and end time. You want to do that option. So,

- type today's date (in the format indicated) as a start date, a week from today (in the format indicated) as the end date, and have it start at 7:00 and end at 23:00.
- f. Select **Next** to go to the Details page.
  - g. Select your currency, **USD**.
  - h. Under Number of Coupons to offer, select **Any number**.
  - i. Under Purchase Condition Type, select **Order Type**. (You would select product type if you wanted to apply your coupons to a specific product, and not to the entire order).
  - j. Select **Next** to go to the Order Purchase Condition page.
  - k. For the Minimum amount qualification, type \$200.00. This is the minimum amount that a customer has to spend to receive the coupon promotion. If you wish to apply a maximum amount qualification, you may also do so here. If you make that selection, a text box will appear for you to type the amount. However, in this case, you do not wish to type a maximum.
  - l. Select **Next** to go to the Coupon Value page.
  - m. Now, you determine if you want your **Coupon as a percentage**, or a fixed amount. In this case, you have said you want to offer 20% off your order. So you select that. (If you had selected to have a fixed amount, a text box would appear for you to type the amount.)
  - n. Click **Finish** to save the coupon promotion. The coupon promotion is displayed in the Coupon Promotion list, and automatically set as active. You should receive a message stating that the coupon promotion was created successfully. Click **OK**.
  - o. You return to the **Coupon Promotions** page, and you should see your coupon.
3. Now you are ready to create ad copy.
    - a. From the **Marketing** menu, select **Ad Copy**.
    - b. Select **New...** to create some ad copy for your new coupon promotion. (If you wanted to change, delete, or receive a summary of an existing promotion, select those options). You are now on the General Definition page.
    - c. In the Ad Copy name text box, type Coupon Promotion 03 ad copy.
    - d. In the Type drop down box, select **Image**.
    - e. In the URL drop down list, select **Coupon Promotion**. Now click **List** to select the coupon promotion. This will take you to the Coupon List page. Check the box next to your coupon promotion. There are two custom fields on this page, if you have additional information to type. Click **Next**. This will take you to the Description Definition page.
    - f. In the **Location** text box, type the relative path name of the flash or image file with respect to the store home directory (that is, with respect to `WAS_installpath/InstalledApps/WC_Enterprise_App_instancename.ear/wcstores.war/store_name`). Type `images/coupon_20_percent.gif`. (Create a 20 % GIF, copy it to: `/WebSphere/AppServer/installedApps/WC_Enterprise_App_instancename.ear/wcstores.war/storedir/images/`).
    - g. In the Marketing text box, type the text that will be displayed with the coupon image in the store.
    - h. Click **Finish**. You should receive a message stating that the ad copy was successfully created. Click **OK**.

- i. You return to the Ad Copy page, and you should see your ad copy. If you choose, you can select this ad copy, and change it, delete it, or receive a summary.
4. Create a campaign.
  - a. From the **Marketing** menu, select **Campaign**. The Campaign window displays, containing a list of currently defined campaigns.
  - b. Select **New...** to create a new campaign. You are now on the **General Definition** page.
  - c. Type a campaign name, FashionFlow 2 campaign. Type a campaign description, such as 20% off your order when you spend \$200. This description will appear in the Campaign List window, and helps to identify the campaign. Type the following description: 20% off order coupon. Click **Next**. You are now on the Business Objectives Definition page.
  - d. Type the campaign sponsor and campaign objectives. Type Campaign Owner, and the objective is To increase consumer spending for FashionFlow.
  - e. Click **Finish** to save the campaign. You should receive a message stating that the campaign was successfully created. Click **OK**. The campaign is displayed in the Campaigns list. You must create initiatives before this campaign can be used.
5. Create campaign initiatives.
  - a. From the **Marketing** menu, select **Campaign Initiatives**. The Campaign Initiatives window displays, containing a list of currently defined campaign initiatives.
  - b. Select **New...** to create a new campaign initiative. You are now on the General Definition page.
  - c. Type a campaign initiative name, FashionFlow 2 coupon promotion.
  - d. In the **initiatives classification** drop down list, select **coupon**.
  - e. In the description text box, type a description for your initiative, such as Campaign initiative for the FashionFlow 2 campaign promotion.
  - f. In the **campaign** drop down list, select the campaign, in this case, **FashionFlow 2 campaign**.
  - g. Click **Next** to go to the Defining displayed dynamic content (what) page.
  - h. Select **Show advertisement**, and then **Advertise Coupon**.
  - i. From the right box, select the correct available ad copy for this campaign initiative, **Ad copy 03**.
  - j. Click **Add**, to add the ad copy to the Selected ad copy box.
  - k. Click **Next** to go to the Defining target customers (who) page.
  - l. Select **Target all customers**. If you select Target customer profiles, you must have some customer profiles already defined.
  - m. Click **Next** to go to the Defining dates for targeting customers (when) page.
  - n. Select **Everyday**, since you have already set your specified time period.
  - o. Click **Next** to go to the Defining target customer behaviors (which) page. If there are any customer behaviors already defined, they will appear here.
  - p. In this scenario, we do not want to add a customer behavior. Click **Finish** to save this campaign initiative. You should receive a message stating that the campaign initiative was successfully created. The campaign initiative is displayed in the Campaign Initiatives list. If you want to change, duplicate, suspend, resume, or delete this initiative, select the appropriate option and follow the wizard to complete those steps.
6. Schedule the coupon promotion.

- a. From the **Marketing** menu, select **e-Marketing Spots**.
  - b. From this list, select **StoreHomePage**, to have the coupon display on your store's home page.
  - c. Select the **schedule** button. This takes you to the Campaign Initiative Scheduling page.
  - d. Schedule a new campaign initiative by selecting **New...** This takes you to the Schedule Campaign Initiatives page.
  - e. In the Selected Campaign drop down list, select **FashionFlow 2 campaign**.
  - f. From the Available campaign initiatives, select **FashionFlow 2 coupon promotion**.
  - g. Click **Add**, to add the campaign initiative to the Selected Campaign Initiatives box.
  - h. You decide to run this campaign initiative indefinitely, so you select that choice. Click **OK** to save the scheduling information. You will see that your campaign initiative is scheduled. If you want to change the schedule, select it, and make your changes.
7. Reload the store front page in your browser to view the coupon promotion.

## Using coupons

In the following exercise, you need to buy a belt for your father. When you enter the store, you notice that if you register you will receive coupons. As a result, you decide to register. You then find that you can use a coupon for 20% off your order.

To start shopping, do the following:

1. In the FashionFlow store, click **Register**. The Registration page displays.
2. Enter the information in the registration fields. Click **Submit**. The My account page displays.
3. The My account page allows you to administer your account information. While you are in the My account page, you realize it contains a Quick Checkout Profile section. You decide to set up a quick checkout profile now, so you can go through the checkout process more quickly. Click **Create or update profile**.
4. In the Quick Checkout Profile page, enter your billing and shipping addresses, as well as your preferred method of shipping and payment information. For the purposes of this Tutorial, enter the following credit card information:
  - a. From the **Credit card type** drop down list, select **Visa**.
  - b. In the **Card number** field, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2005.
5. Click **Submit**. The My account page displays.
6. Click **Home**. The Home page displays. Notice that a banner advertising coupons now displays at the bottom of the home page.
7. In the banner, click the 20% off image to receive the coupon. The My coupons page displays, stating that the coupon is good for the entire order and does not have an expiry date.
8. Now, you need to buy a new belt for your father, so click **Men's > Accessories**. The Men's accessories product list page displays. A classic belt is included.
9. Click **Classic belt**.
10. In the **Quantity** field, type 1.



11. From the **Color** list, select **black**.
12. Click **Add to shopping cart**. The Shopping Cart displays. Review the items in your shopping cart.
13. Click **Quick checkout**. The Quick Checkout Order Summary page displays.
14. To redeem your coupons, click **Redeem coupons**. The applicable coupons page displays.
15. Since the entire order coupon is applicable to your order, select it, then click **Apply coupons**. The Checkout - Order summary page redisplay. Notice that your coupon discount has now been applied.
16. Review your billing and shipping information.
17. Enter your credit card information. For the purposes of this Tutorial, repeat the credit card information detailed in step 4 above.
18. When you are satisfied that your order is correct, click **Order now**. The Order confirmation page displays, stating the details of your order.

---

## Using cross-sell

### Demonstrates

This tutorial illustrates the following features of FashionFlow:

- Shopping flow
- Regular checkout
- Cross-sell

### Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. For more information, see *Publishing a store archive from the Administration Console*.

## Using cross-sell

In the following tutorial, you will use cross-sell to expand your shopping choices.

To start shopping, do the following:

1. It is your anniversary, and you want to buy some clothes for your husband. In the FashionFlow store, click **Men's Fashions**. The Men's Fashions page displays. You think he needs pants, so you select Pants and shorts.
2. You decide to purchase a pair of Relaxed fit 5 pocket cotton pants. You click on that to take a look at the larger image. While looking, you see that the store has recommended a knit long-sleeved shirt. You think that would make a very nice outfit. So, you decide to buy both the pants and the shirt for your husband.
  - a. First, purchase the cotton pants:
    - 1) In the **Quantity** field, type 1.
    - 2) From the **Color** drop down list, select **brown**.
    - 3) From the **Size** drop down list, select **large**.
    - 4) Click **Add to shopping cart**. The Shopping Cart page displays, with your pants.
  - b. Now, purchase the knit long-sleeve shirt:

- 1) From the Shopping cart page, click on the pants you just added to your cart. This will take you back to the Relaxed fit 5 pocket cotton pants product page.
- 2) Click the **knit long-sleeve shirt**.
- 3) From the **Quantity** field, type 1.
- 4) From the **Size** drop down list, select **large**.
- 5) From the **Color** drop down list, select **black**.
- 6) Click **Add to shopping cart**. The Shopping Cart page displays.
3. In the Shopping Cart page, review the contents of your order. You should have one pair of cotton pants, and one knit shirt. Your total is \$89.99. You decide that you have done enough shopping for the day, so you click **Checkout**.
4. In the **Checkout -Add billing address** page, enter your **billing address information**. Click **Next**.
5. In the **Checkout - Select shipping address** page, select to whom you will ship each item. Since you want to wrap it for your anniversary, and you don't want your husband to open the package, you decide to **ship all items to yourself**. Click **Next**.
6. In the **Checkout - Select shipping method** page, select **Express mail**. Click **Next**.
7. The Checkout - Order Summary page displays. Review the details of your order.
8. To complete your order, enter your credit card information. For the purposes of this tutorial, enter the following:
  - a. From the **Credit card type** drop down list, select **Visa**.
  - b. In the **Card number** field, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2005.
  - e. Click **Order now**. The Order confirmation page displays, stating the details of your order.

---

## Buy X and get a free gift

### Demonstrates:

This tutorial illustrates the following features of FashionFlow:

- Shopping flow
- Regular checkout
- Creating a rule-based discount in WebSphere Commerce Accelerator
- Using the discount in FashionFlow (free gift (evening bag) if a customer buys the specified product (women's evening dress))

### Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. For more information, see *Publishing a store archive from the Administration Console*.

## Creating your discount: receive a free evening bag when you buy an evening dress

**Note:** FashionFlow provides a sample discount with data included. This data needs only to be configured and activated. For the required steps, you can refer to the discount information within “Part one: Publish and configure a store based on FashionFlow” on page 29. This tutorial provides more detailed steps, and some optional modifications to the data provided, such as changing the descriptions. These steps do not have to be completed if you have already set up your discounts.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the Merchandise menu, select **Product Promotions**. The Product Promotions window appears.
3. Check the box beside freeBag and click **Modify**. The Promotion Properties window opens.
4. Click **Select Merchandise** from the side menu. The Select Merchandise window opens.
5. Click **Search Product**. The Product Search window opens.
  - a. In the name field, type evening dress, and click **Search**.
  - b. The search results return one product.
  - c. Check the box beside the evening dress (product-sku-nf-701) and click **Add**.
6. Select **Free Gift with Purchase** from the side menu. The Free Gift with Purchase window opens.
7. This is when you associate the free gift with the product purchase. You will need the SKU, which you will search for in a moment.
8. Click **Search Product**. The Product Search window opens.
  - a. In the name field, type evening bag and click **Search**.
  - b. Check the box beside the evening bag (item-sku-nf-1072) and click **Add**.
  - c. Type 1 in the Quantity to Add field.
  - d. Select **Specify the minimum quantity to purchase**, since we want the customer to buy one evening dress to receive the bag, and then type 1 in the item field.
  - e. Click **OK**.
9. Click **OK** to the dialog box. You return to the Product Promotions window.
10. Now you want to customize the existing information included with FashionFlow to reflect your own store. This is where you will describe your promotion. Select your promotion again, and click **Modify**. The Promotion Properties window opens.
  - a. There will already be a name assigned to this promotion that cannot be altered: freeBag.
  - b. Type an internally used description: Buy evening dress and get free evening bag.
  - c. The shorter customer description is fine, so you keep it.
  - d. Replace the existing description for the customer. This appears in the Discount Details. It includes disclaimers, and promotion details. **This offer applies only when you purchase the women’s evening dress. The bag is only available in black. Promotion based on availability. This is an online customer promotion only. Offer subject to change without notice.**

- e. Change the priority: **Moderate**. The priority applies if you have two discounts that can apply to the same purchase; only one discount can be applied. The priority is how precedence is determined.
  - f. Type a target sales volume. This is a monetary amount. Change it to 1500.00.
11. Now it is time to schedule the promotion. Select **Promotion Schedule**. The Promotion Schedule window displays.
    - a. Select if you want the promotion to be available every day, or certain days. Select **This promotion is available every day of the week**.
    - b. Select the date range during which the promotion is available. Select **This promotion is in effect during a specified period**. Type a start date of 2003 06 01 and an end date of 2004 12 31. Or, you can use the calendar provided to select the dates. Click on the icon if you want to use the calendar.
    - c. Select the time range during which the promotion is available. Select **The promotion is in effect all through the day**.
  12. Now it is time to determine the customer groups to which the promotion applies. Select **Select Target Profiles**. The Applicable Customer Groups window displays.
    - a. Select **Assign this promotion to all customer**. If you have chosen to select specific customer groups, you would choose from the available customer groups. These customer groups are defined in customerprofile.xml.
    - b. Click **OK** to save all of your changes to these windows.
  13. Click **OK** to the dialog box. You return to the Order Promotions window.

## Activating a rules based discount

1. To activate a discount, in the Product Promotions window, check **freeBag** to activate it.
2. Click **Activate**. The status changes from Inactive to Active.

## Using the discount

In the following tutorial, you will purchase the women's evening dress. As a result you will receive a free evening bag with your purchase.

To start shopping, do the following:

1. In the FashionFlow store, you see a promotion on the home page stating **Buy an evening dress, get a free evening bag**. You remember you have a wedding to go to, and that it will be quite formal. You always like having new dresses, and could use an attractive evening bag.
2. You click **Buy an evening dress, get a free evening bag** on the home page, and it takes you to the Get a gift details page. There you read about the conditions of the promotion, and decide it sounds good. On that page there is a link to both the evening dress and the evening bag.
3. You click on the link to the evening dress, which takes you to the evening dress product page. The dress looks nice, you like the color, and think it would be perfect for the wedding.
4. Now you want to see the free bag that comes with the dress purchase. You click on the details link, which returns you to the Get a gift details page. There is a link there to the evening bag, so you click that. The bag looks nice, and you think it would look great with the dress. So you decide to buy the dress.
5. To purchase the evening dress:

- a. Click **Women's Fashion**.
  - b. Click **Dresses and skirts**.
  - c. Click **Evening dress**.
  - d. In the **Quantity** field, type 1.
  - e. From the **Color** drop down list, select **black**.
  - f. From the **Size** drop down list, select **medium**.
  - g. Click **Add to shopping cart**. The Shopping Cart page displays.
6. In the Shopping Cart page, review the contents of your order. You should have a black evening dress, and a black evening bag. Your total is \$149.00. Next to the black evening bag, you will see the word "free" appears, and a description of the discount. You decide that you have done enough shopping for the day, so you click **Checkout**.
  7. In the Checkout -Add billing address page, type your billing address information. Click **Next**.
  8. In the Checkout - Select shipping address page, select to whom you will ship each item. You want to **ship all items to yourself**. Click **Next**.
  9. In the Checkout - Select shipping method page, select **Express mail**. Click **Next**.
  10. The Checkout - Order Summary page displays. Review the details of your order. Notice that next to the evening bag you received, the word "free" appears.
  11. To complete your order, type your credit card information. For the purposes of this tutorial, type the following:
    - a. From the **Credit card type** drop down list, select **Visa**.
    - b. In the **Card number** field, type 4111111111111111.
    - c. From the **Expiration month** drop down list, select 10.
    - d. From the **Expiration year** drop down list, select 2005.
    - e. Click **Order now**. The Order confirmation page displays, stating the details of your order.

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## Spend \$X and get free shipping

### Demonstrates

This tutorial illustrates the following features of FashionFlow:

- Shopping flow
- Regular checkout
- Creating a rule-based discount in WebSphere Commerce Accelerator
- Using the discount in FashionFlow (when a customer spends \$100 or more, and selects regular mail, they will receive free shipping)

### Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. For more information, see *Publishing a store archive from the Administration Console*.

## Creating your discount: Free shipping when you spend \$100 and select regular mail

**Note:** FashionFlow provides a sample discount with data included. This data needs only to be configured and activated. For the required steps, you can refer to the discount information within “Part one: Publish and configure a store based on FashionFlow” on page 29. This tutorial provides more detailed steps, and some optional modifications to the data provided, such as changing the descriptions. These steps do not have to be completed if you have already set up your discounts.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Merchandise** menu, select **Order Promotions**. The Order Promotions window displays.
3. Check the box next to freeShipping. Select **Modify**. The Promotion Properties window opens.
4. Select Discounted Shipping from the side menu. The Discounted Shipping window opens.
  - a. The Free Shipping option will already be selected.
  - b. You need to highlight **Regular mail** from the drop down menu for Shipping modes.
  - c. Select the minimum qualification for the customer to receive free shipping. First, select **Specify a minimum qualification for this discount**. Then type 100.00 as the purchase amount.
  - d. Check the box that says **Allow this discount to be applied in combination with a product promotion**.
  - e. Click **OK**.
5. Now you want to customize the existing information included with FashionFlow to reflect your own store. Select **Promotion Properties** from the side menu. The Promotion Properties window opens. This is where you will describe your promotion.
  - a. There will already be a name assigned to this promotion that cannot be altered: freeShipping.
  - b. Type an internally used description. Spend \$100 and get free shipping when you select regular mail.
  - c. Replace the existing description for the customer with this one: Spend \$100 and get free shipping when you select regular mail.
  - d. Replace the existing description for the customer with this one. This appears in the Discount Details. It includes disclaimers, promotion details. Type: This offer is good for regular mail shipping to the address specified in your order. This offer is not valid when any other type of shipping is chosen. The \$100 amount applies to merchandise only. Taxes, shipping and handling do not count toward the qualifying amount. No price adjustments on previous purchases. Offer subject to change without notice.
  - e. Keep the same priority. The priority applies if you have two discounts that can apply to the same purchase; only one discount can be applied. The priority is how precedence is determined.
  - f. Type a target sales volume. This is a monetary amount. Change it to 2000.00.

6. Now it is time to schedule the promotion. Select **Promotion Schedule**. The Promotion Schedule window displays.
  - a. Select if you want the promotion to available every day, or certain days. Select **This promotion is available every day of the week**.
  - b. Select the date range during which the promotion is available. Select This promotion is in effect during a specified period. Type a start date of 2003 06 01 and an end date of 2004 12 31. Or, you can use the calendar provided to select the dates. Click on the icon if you want to use the calendar.
  - c. Select the time range during which the promotion is available. Select **The promotion is in effect all through the day**.
7. Now it is time to determine the customer groups to which the promotion applies. Select **Select Target Profiles**. The Applicable Customer Groups window displays.
  - a. Select Assign this promotion to all customer. If you has chosen to select specific customer groups, you would choose from the available customer groups. These customer groups are defined in customerprofile.xml.
  - b. Click **OK** to save all of your changes to these windows.
8. Click **OK** for the dialog box. You return to the Product Promotions window.

## Activating a rules based discount

1. To activate a discount, in the Order Promotions window, check freeShipping to activate it.
2. Click **Activate**. The status changes from Inactive to Active.

**Note:** You must propagate your discount data from the development server to the production WebSphere Commerce Server before any customer orders can make use of them. Contact your site administrator for assistance.

## Using the discount

In the following tutorial, you will purchase several products, and your entire order will total \$100 or more. As a result you will receive free shipping for your order as long as you select regular mail.

To start shopping, do the following:

1. You want to buy some new clothes because you are starting a new job. In the FashionFlow store, click **Men's Fashion**. The Men's Fashion product list page displays. Peruse the products available.
2. You see the featured special on that page, the casual ensemble, and think it looks very nice. So you click that.
3. You review the four items, and decide to purchase all of them.
  - a. First, purchase the dress shirt:
    - 1) In the **Quantity** field, type 1.
    - 2) From the **Size** drop down list, select **large**.
    - 3) From the **Color** drop down list, select **stone**.
  - b. Next, purchase the plain front cotton pants:
    - 1) In the **Quantity** field, type 1.
    - 2) From the **Color** drop down list, select **khaki**.
    - 3) From the **Size** drop down list, select **large**.
  - c. Next, purchase the classic wallet:
    - 1) In the **Quantity** field, type 1.



- 2) From the **Color** drop down list, select **brown**.
- d. Next, purchase the classic belt:
  - 1) In the **Quantity** field, type 1.
  - 2) From the **Color** drop down list, select **brown**.
4. Select **Add to shopping cart**. The Shopping Cart page displays.
5. In the Shopping Cart page, review the contents of your order. You should have one dress shirt, one pair of plain front cotton pants, one wallet, and one belt. Your total is \$132.56. You decide that you have done enough shopping for the day, so you click **Checkout**.
6. In the Checkout -Add billing address page, enter your **billing address information**. Click **Next**.
7. In the Checkout - Select shipping address page, select to whom you will ship each item. You select **ship all items to yourself**. Click **Next**.
8. In the Checkout - Select shipping method page, select **Regular mail**. Click **Next**.
9. The Checkout - Order Summary page displays. Review the details of your order. You notice that you receive free shipping because your order exceeded \$100.00 and you selected regular mail.
10. To complete your order, enter your credit card information. For the purposes of this tutorial, enter the following:
  - a. From the **Credit card type** drop down list, select **Visa**.
  - b. In the **Card number** field, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2005.
  - e. Click **Order now**. The Order confirmation page displays, stating the details of your order.

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## Guided Sell

### Demonstrates

**Demonstrates:** This demonstration illustrates the following features of FashionFlow:

- Shopping flow
- Regular checkout
- Guided Sell (a feature of Product Advisor)
- Product Comparison (a feature of Product Advisor)

### Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. For more information, see *Publishing a store archive from the Administration Console*. You must also enable product advisor. For more information, see *Changing store flows using WebSphere Commerce Accelerator* in the WebSphere Commerce online help.

### Using Guided Sell

In the following demonstration, you will use Guided Sell to help you narrow down your shopping choices in order to help you decide which product you would like to buy. Guided Sell asks you certain questions, and based on your



answers, suggests a list of products. If you choose, you can use Product Comparison to see the products side-by-side to help you make a decision.

To start shopping, do the following:

1. It is your brother's birthday, and you need to buy him a present. He doesn't have many clothes, so you decide to buy him clothes. In the FashionFlow store, click **Men's Fashion**. The Men's Fashion product list page displays. Peruse the products available.
2. But you don't know what you want to buy. Then, you see text on the sidebar that says "Guided Sell will help you find what you are looking for". Just the help you need. So, you click **Guided Sell** on the sidebar.
3. The **Guided Sell** page displays. It asks you to select either **Men's Fashions** or **Women's Fashions** to begin.
4. You select **Men's Fashions**.
5. The **Guided Sell: Men's Fashions** page displays.
6. It asks "What style of clothing are you interested in today?" You select **casual**.
7. It asks "What part of your wardrobe do you want to build". You select **tops**.
8. It states "Please select what kind of top you would like". You select **sweatshirts**.
9. Then you think about it, realize that your brother has too many sweatshirts, and change your mind.
10. You click on that question again in the history section, displayed at the bottom of the page. The system displays the question and answer page for your last question. You change your answer from **sweatshirts** to **shirts**.
11. You decide that you've narrowed your search enough, and you would like to see a side-by-side comparison of the results.
12. To compare these results, click **Compare results**.
13. The Product Advisor - Product Comparison page displays. The color, price, and size of the items that match your search results are listed. To view these items, click the corresponding product link.
14. You see a short-sleeve casual shirt, and a knit long-sleeve shirt.
15. You know your brother prefers short sleeves, and when you check the price, you see that it is less expensive than the other shirt. And this shirt comes in khaki, which looks very good on him, and the long sleeve shirt does not. So, you decide to purchase the short-sleeve shirt.
16. Add it to your shopping cart, and check out. Or, start your search again and use different criteria. To use Guided Sell again, go back to step 3 and repeat process until satisfied. Once satisfied, add desired items to your shopping cart.
17. In the Shopping Cart page, review the contents of your order. You should have one short-sleeve casual shirt. Your total is \$30.89. You decide that you have done enough shopping for the day, so you click **Checkout**.
18. In the **Checkout -Add billing address** page, enter your **billing address information**. Click **Next**.
19. In the **Checkout - Select shipping address** page, select to who you will ship each item. Since your sister lives close to you, you decide to **ship all items to yourself**, and just deliver the sweatshirt personally. Click **Next**.
20. In the **Checkout - Select shipping method** page, select **Express mail**. Click **Next**.
21. The Checkout - Order Summary page displays. Review the details of your order.

22. To complete your order, enter your credit card information. For the purposes of this demonstration, enter the following:
  - a. From the **Credit card type** drop down list, select **Visa**.
  - b. In the **Card number** field, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2005.
  - e. Click **Order now**. The Order confirmation page displays, stating the details of your order.

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## Buy X, get one more item at a discount

### Demonstrates

This tutorial illustrates the following features of FashionFlow:

- Shopping flow
- Regular checkout
- Creating a rule-based discount in WebSphere Commerce Accelerator
- Using the discount in FashionFlow (When a customer buys a specified item, they will receive a % discount on the next identical item)

### Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. For more information, see *Publishing a store archive from the Administration Console*.

## Creating your discount: buy a tank top, get the second one at a 30% discount

**Note:** FashionFlow provides a sample discount with data included. This data needs only to be configured and activated. For the required steps, you can refer to the discount information within “Part one: Publish and configure a store based on FashionFlow” on page 29. This tutorial provides more detailed steps, and some optional modifications to the data provided, such as changing the descriptions. These steps do not have to be completed if you have already set up your discounts.

1. (Open the WebSphere Commerce Accelerator). Depending on your user role, one or more menus display.
2. From the **Merchandise** menu, select **Product Promotions**. The Product Promotions window opens.
3. Check the box next to next30Percent and select **Modify**. You are going to modify the sample promotion to contain the specific information for the items from your store. In this case, we are going to set up the promotion for the sporty tank top. The Promotion Properties window opens.
4. Click **Select Merchandise** from the side menu. The Select Merchandise window opens.
  - a. Leave this blank, and click **Search Product**.
  - b. The Product Search window opens.
  - c. In the Name field, type sport tank top, and select **exact phrase**. Click **search**.

- d. The search produces four items. You must add these items individually. The promotion is applied at the item level, not at the product level.
  - e. Check the box beside one of the sport tank tops (item-sku-nf-2395) and click **Add**.
  - f. Click **OK**.
5. Click **OK** to the dialog box.
  6. Check the box beside next30Percent and click **Duplicate**.
  7. In the dialog box, type the name for the next item, next30Percent2, and click **OK**. This must be a unique name.
  8. You must repeat these steps for every attribute associated with the item. For example, with the tank top, you must repeat the steps to create a promotion for every color and size the tank top is available in. It is available in 2 sizes and 2 colors, so you must create 4 promotions, so that it will be applied to whichever tank top the customer chooses.
  9. Repeat steps 6 through 7, checking the box beside next30Percent, clicking **Duplicate**, the first time naming the next item **next30Percent3**, the second time naming the item **next30Percent4**, so that you have a name for every item.
  10. Now, repeat steps 3 through 4, the first time checking the box next to **next30Percent2**, modifying, and using item-sku-nf-2396, the second time checking the box next to **next30Percent3**, modifying, and using item-sku-nf-2397, and the third time checking the box next to **next30Percent4**, modifying, and using item-sku-nf-2398. So, each promotion has a different item added to it.
  11. You return to the Product Promotions window.
  12. Now you want to customize the existing information included with FashionFlow to reflect your own store. This is where you will describe your promotion. Select your promotion again, and click **Modify**. The Promotion Properties window opens.
    - a. There will already be a name assigned to this promotion that cannot be altered: next30Percent.
    - b. Type an internally used description. Buy a tank top, get the next one at 30% off.
    - c. The shorter customer description is fine, so you keep it.
    - d. Replace the existing description for the customer with this one. This appears in the Discount Details. It includes disclaimers, promotion details. **This offer applies to the women's sporty tank tops. The discount is only applied to the second tank top.**
    - e. Change the priority: **Low**. The priority applies if you have two discounts that can apply to the same purchase; only one discount can be applied. The priority is how precedence is determined.
    - f. Type a target sales volume. This is a monetary amount. Change it to 500.00.
  13. Now it is time to schedule the promotion. Select **Promotion Schedule** from the side menu. The Promotion Schedule window displays.
    - a. Select if you want the promotion to be available every day, or certain days. Select **This promotion is available every day of the week**.
    - b. Select the date range during which the promotion is available. Select This promotion is in effect during a specified period. Type a start date of 2003 06 01 and an end date of 2004 12 31. Or, you can use the calendar provided to select the dates. Click on the icon if you want to use the calendar.

- c. Select the time range during which the promotion is available. Select **The promotion is in effect all through the day**.
14. Now it is time to determine the customer groups to which the promotion applies. Select **Select Target Profiles**. The Applicable Customer Groups window displays.
  - a. Select **Assign this promotion to all customers**. If you had chosen to select specific customer groups, you would choose from the available customer groups. These customer groups are defined in customerprofile.xml.
15. Now click on the **Buy X, get one more item at a discount** to verify the details there.
  - a. You will see which product or item you have selected as X, in this case it is the SKU for the tank top. This cannot be changed.
  - b. The quantity that a customer has to buy to receive the discount is 1. Do not change this.
  - c. The discount is listed as 30%. Do not change this.
  - d. The maximum quantity to give for free is 1. Do not change this.
  - e. Click **OK** to save all of your changes to these windows.
16. Click **OK** to the dialog box. You return to the Product Promotions window.

## Activating a rules based discount

1. To activate a discount, in the Product Promotions window, check next30Percent to activate it.
2. Click **Activate**. The status changes from Inactive to Active.

## Using the discount

In the following tutorial, you will purchase the item that offers the 30% discount. This tutorial shows the customer selecting a tank top with a different attribute, and not getting the discount at first, changing that attribute, and getting the discount.

To start shopping, do the following:

1. In the FashionFlow store, click **Women's Fashion**. The Women's Fashion product list page displays. Peruse the products available.
2. You select **Activewear**.
3. You decide to purchase a pair of soccer shorts, and a sporty tank top.
  - a. First, purchase the soccer shorts:
    - 1) Click **Soccer shorts**. The Soccer shorts product page displays.
    - 2) In the **Quantity** field, type 1.
    - 3) From the **Size** drop down list, select **large**.
    - 4) From the Color drop down list, select **charcoal gray**.
    - 5) Click **Add to shopping cart**. The Shopping Cart page displays.
    - 6) Click **Return to shopping**. The home page displays.
  - b. Now, you go to purchase the sporty tank top. You notice that you get a discount if you buy two of the same color and size, so you decide to buy two.
    - 1) Click **Women's Fashion**. The Women's Fashion product list page displays.
    - 2) Click **Activewear**.
    - 3) Click **Sporty tank top**. The Sporty tank top product page displays.
    - 4) In the **Quantity** field, type 2.

- 5) From the **Color** drop down list, select **white**.
- 6) From the **Size** drop down list, select **small**.
- 7) Click **Add to shopping cart**. The Shopping Cart page displays.
4. In the Shopping Cart page, review the contents of your order. You should have one pair of charcoal gray soccer shorts, and two white sporty tank tops. Your total is \$46.20. Click **Checkout**.
5. In the Checkout -Add billing address page, you review your **billing address information**. It is fine. Click **Next**.
6. In the Checkout - Select shipping address page, your address is selected. Click **Next**.
7. In the Checkout - Select shipping method page, **Express mail** is still selected. Click **Next**.
8. The Checkout - Order Summary page displays. Review the details of your order. Now you notice that you received a 30% discount on the second tank top. You are happy, and want to pay for your purchases.
9. To complete your order, type your credit card information. For the purposes of this tutorial, type the following:
  - a. From the **Credit card type** drop down list, select **Visa**.
  - b. In the **Card number** field, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2005.
  - e. Click **Order now**. The Order confirmation page displays, stating the details of your order.

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## Spend \$x and get y% off discount

### Demonstrates

This tutorial illustrates the following features of FashionFlow:

- Shopping flow
- Regular checkout
- Creating a rule-based discount in WebSphere Commerce Accelerator
- Using the discount in FashionFlow - 10% discount if a customer spends over \$100 per order

### Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. For more information, see *Publishing a store archive from the Administration Console*.

## Creating your discount: spend \$100 and receive 10% off your order

**Note:** FashionFlow provides a sample discount with data included. This data needs only to be configured and activated. For the required steps, you can refer to the discount information within “Part one: Publish and configure a store based on FashionFlow” on page 29. This tutorial provides more detailed steps, and some optional modifications to the data provided, such as changing the descriptions. These steps do not have to be completed if you have already set up your discounts.

You can either keep all of the existing data for your discount, modify the existing data, or create a new discount. If you want to keep the sample data, which is spend \$150, and get 15% off, you do not need to duplicate. You only need to duplicate it if you want to rename this discount. Also note that if you rename it, and change the amount, you will need a new image for the banner. To keep it as packaged, check **over150**, select **Modify**, and start from step 4.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Merchandise** menu, click **Order Promotions**. The Order Promotions window displays.
3. Check **over150** and select **Duplicate**. Now give the discount a new name: **over100**.
4. Check **over100** and select **Modify**. The Promotion Properties window opens. This is where you will describe your new promotion.
  - a. Type the internally used description: Spend \$100 and get 10% off of your entire order.
  - b. Change the short description for the customer: Spend \$100 and get 10% off.
  - c. Type a long description for the customer. This appears in the Discount Details. This includes disclaimers, promotion details. Type: The \$100 amount applies to merchandise only. The 10% discount is applied to the total purchase price before taxes. Taxes, shipping and handling do not count toward the qualifying amount. If you spend \$100, the 10% discount promotion will take precedence, and you will not be eligible for our Get free shipping on purchases of \$100 or more when you choose regular mail promotion. This promotion is exclusive to our online customers. Offer subject to change without notice.
  - d. Select the priority: **Moderate**. The priority applies if you have two discounts that can apply to the same purchase; only one discount can be applied. The priority is how precedence is determined.
  - e. Type a target sales volume. This is a monetary amount. Type 1000.00.
5. Now it is time to schedule the promotion. Select **Promotion Schedule**. The Promotion Schedule window displays.
  - a. Select if you want the promotion to available every day, or certain days. Select **This promotion is available every day of the week**.
  - b. Select the date range during which the promotion is available. Select **This promotion is in effect during a specified period**. Type a start date of 2003 06 01 and an end date of 2004 12 31. Or, you can use the calendar provided to select the dates. Click on the icon if you want to use the calendar.
  - c. Select the time range during which the promotion is available. Select **The promotion is in effect all through the day**.
6. Now it is time to determine the customer groups to which the promotion applies, or the target types. Select **Select Target Profiles**. The Applicable Customer Groups window displays.
  - a. Select **Assign this promotion to all customers**. If you had chosen to select specific customer groups, you would choose from the available customer groups. These customer groups are defined in customerprofile.xml.
7. Select **Percentage Off** from the side menu. The Percentage Off window displays.
  - a. Change the discount the customer will receive. Type 10.



- b. For the minimum qualification, select **Specify a minimum qualification for this discount**.
  - c. Change the amount the customer must purchase to receive the discount. Type 100.00.
  - d. Check the box that says **Allow this discount to be applied in combination with a product promotion**.
8. Select **Discount Ranges** from the side menu. The Ranges window displays. To specify which range your discount applies to which works with the priority selection (for example, if a customer spends \$100.00 or more, they receive the 10% off, if they spend less than \$100.00, they do not receive the discount).
    - a. The Ranges window displays. The ranges will already be there. Verify that there is one range starting at 0.00 and ending at 99.99, with a discount of 0. Also confirm that there is a range starting at 100.00 and ending at and up, with a discount of 10.
    - b. Click **OK** to save all of your changes to these windows.
    - c. Click **OK** for the dialog box.

## Activating a rules based discount

1. To activate a discount, in the Order Promotions window, check over100 to activate it.
2. Click **Activate**. The status changes from Inactive to Active.

**Note:** You must propagate your discount data from the development server to the production WebSphere Commerce Server before any customer orders can make use of them. Contact your site administrator for assistance.

## Using the discount

In the following tutorial, you will purchase several products, and your entire order will total more than \$100. As a result you will receive a 10% discount off the total order.

To start shopping, do the following:

1. In the FashionFlow store, click **New Arrivals**. The New Arrivals product list page displays. Peruse the products available.
2. You decide to purchase a pair of cargo pants and a pair of painter jean shorts.
  - a. First, purchase the cargo pants:
    - 1) Click **Cargo pants**. The Cargo pants product page displays.
    - 2) In the **Quantity** field, type 1.
    - 3) From the **Size** drop down list, select **8R**.
    - 4) Click **Add to shopping cart**. The Shopping Cart page displays.
    - 5) Click **Return to shopping**. The home page displays.
  - b. Now, purchase the painter jean shorts:
    - 1) Click **New Arrivals**. The New Arrivals product list page displays.
    - 2) Click **Painter jean shorts**. The Painter jean shorts product page displays.
    - 3) You decide to buy two pair of shorts, so in the **Quantity** field, type 2.
    - 4) From the **Color** drop down list, select **indigo**.
    - 5) From the **Size** drop down list, select **6**.
    - 6) Click **Add to shopping cart**. The Shopping Cart page displays.
3. You decide that you need some tops to go with your new shorts and pants.

4. Click **Return to shopping**. The home page displays.
5. Click **Women's Fashions > Shirts and tops**. The Shirts and tops product list page displays. Peruse the products available.
6. You decide to purchase a hooded sweatshirt for yourself.
  - a. Click **Hooded sweatshirt**. The Hooded sweatshirt product page displays.
  - b. In the **Quantity** field, type 1.
  - c. From the **Size** drop down list, select **medium**.
  - d. From the **Color** drop down list, select **denim**.
  - e. Click **Add to shopping cart**. The Shopping Cart page displays.
7. You decide that your sister would like a hooded sweatshirt too. Repeat steps 5 and 6 to purchase one for her. Since she likes gray, select gray instead of denim for the color.
8. In the Shopping Cart page, review the contents of your order. You should have one pair of cargo pants, two pair of painter jean shorts, and two hooded sweatshirts, one denim and one black. Your total is \$182.45. You decide that you have done enough shopping for the day, so you click **Checkout**.
9. In the Checkout -Add billing address page, enter your **billing address information**. Click **Next**.
10. In the Checkout - Select shipping address page, select to who you will ship each item. Since your sister lives close to you, you decide to **ship all items to yourself**, and just deliver the sweatshirt personally. Click **Next**.
11. In the Checkout - Select shipping method page, select **Express mail**. Click **Next**.
12. The Checkout - Order Summary page displays. Review the details of your order. Notice that you received a 10% discount because your order total was over \$100.
13. To complete your order, enter your credit card information. For the purposes of this tutorial, enter the following:
  - a. From the **Credit card type** drop down list, select **Visa**.
  - b. In the **Card number** field, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2005.
  - e. Click **Order now**. The Order confirmation page displays, stating the details of your order.

---

## Using up-sell

### Demonstrates

This tutorial illustrates the following features of FashionFlow:

- Shopping flow
- Regular checkout
- Up-sell

### Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. For more information, see *Publishing a store archive from the Administration Console*.



## Using up-sell

In the following tutorial, you will see an up-sell being used to encourage you to buy something more expensive than what you may have originally chosen.

To start shopping, do the following:

1. It is your anniversary, and you want to buy some clothes for your wife. In the FashionFlow store, click **Women's Fashions**. The Women's Fashions page displays. You think she needs some new pajamas to take on the romantic vacation you have planned for her, so you select Pajamas.
2. You see the cotton pajamas, think they look nice, so you click on that to take a look at the larger image. While looking, you see that the store has some silk pajamas on the same page. They are more expensive, but they are silk, and it is your anniversary, so you decide that silk pajamas would be a better choice.
  - a. Purchase the silk pajamas:
    - 1) Click the image of the silk pajamas to go to that page.
    - 2) In the **Quantity** field, type 1.
    - 3) From the **Size** drop down list, select **medium**.
    - 4) From the **Color** drop down list, select **teal**.
    - 5) Click **Add to shopping cart**. The Shopping Cart page displays, with your pajamas.
3. In the Shopping Cart page, review the contents of your order. You should have one pair of silk pajamas. Your total is \$55.00. You decide that you have done enough clothes shopping for the day, and that you must hurry to plan your romantic vacation, so you click **Checkout**.
4. In the **Checkout -Add billing address** page, enter your **billing address information**. Click **Next**.
5. In the **Checkout - Select shipping address** page, select to whom you will ship each item. Since you want to wrap it for your anniversary, and you do not want your wife to open the package, you decide to **ship all items to yourself**. Click **Next**.
6. In the **Checkout - Select shipping method** page, select **Express mail**. Click **Next**.
7. The Checkout - Order Summary page displays. Review the details of your order.
8. To complete your order, enter your credit card information. For the purposes of this tutorial, enter the following:
  - a. From the **Credit card type** drop down list, select **Visa**.
  - b. In the **Card number** field, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2005.
  - e. Click **Order now**. The Order confirmation page displays, stating the details of your order.

---

## Creating and receiving e-mail interest options

### Demonstrates

This tutorial illustrates the following features of FashionFlow:

- Configuring an outbound e-mail activity account in the WebSphere Commerce Administration Console

- Configuring an inbound e-mail activity account in the WebSphere Commerce Administration Console
- Creating an e-mail activity in the WebSphere Commerce Accelerator
- Registration, selecting e-mail interests in FashionFlow
- Receiving an e-mail about the interests selected

## Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. For more information, see *Publishing a store archive from the Administration Console*.

## Create e-mail templates

You need to populate the EMLMSG table if you need to create an e-mail activity. These steps will populate the EMLMSG table with the three templates, which are provided with FashionFlow. After completing these steps, Marketing managers can go to the WebSphere Commerce Accelerator to schedule e-mails activities.

To follow the steps on how to create e-mail templates, refer to the *Create e-mail templates* section in “Part one: Publish and configure a store based on FashionFlow” on page 29.

In the following tutorial, you will use the WebSphere Commerce Administration Console, and the WebSphere Commerce Accelerator to set up your e-mail account and activity.

## Setting up an e-mail account and activity

To set up an e-mail account and activity for your store, do the following:

1. Log onto the Administration Console.
2. If you haven't selected a store, do so now.
3. Now you're going to create an e-mail account for your e-mail activity.
  - a. From the **Configuration** menu, click **Email Activities**. The E-mail Activity wizard displays.
    - 1) If you don't see **Email Activities** under the **Configuration** menu, you have to edit the *instance\_name.xml*, where *instance\_name* is the name of your instance. The *instance\_name.xml* file is located in: *WC\_userdir/instances/instance\_name/xml*. Enable, or change from “false” to “true” the following files:
      - `<component enabled="true" name="EmailActivity" />`
      - `<resourceConfig enabled="true" file="emailactivity/resources.xml" />`
    - 2) Stop and restart the WebSphere Commerce server.
  - b. Complete the fields in the Outbound Email Activity Account Configuration page with the information for an outbound SMTP account. Use this page to configure an outbound SMTP e-mail account to use for your e-mail activities.
    - 1) Type a name for the account. Let's call it FashionFlow. This is displayed to the marketing manager during the e-mail activity creation process.
    - 2) Type a brief description for the account. Type e-mail activity account.
    - 3) Type the fully qualified host name of the SMTP server to connect with (for example, *myhost.mydomain*).

- 4) Type the e-mail account to use on the SMTP server. This acts as a user ID when connecting to the SMTP server. This e-mail account needs to be created in the SMTP server. For details on creating an e-mail account, refer to *Reference: Sample of how to create an e-mail account in an SMTP server, using a Domino Server machine as an example*
  - 5) Select the Required Authentication option if the e-mail account required authentication prior to connecting to the server. If you select this option, the following field displays: Password. Type the password for the account.
  - 6) Type the port number on the SMTP host which accepts SMTP requests. The default is 25.
  - 7) Type the fully qualified host name of the commerce server. This is the machine on which an e-mail activity is created.
  - 8) Type the time at which the account should begin mailing pending e-mail activities. This is a 24 hour clock.
  - 9) Click **OK**.
- c. Complete the fields in the Inbound Email Activity Account Configuration page with the information for an inbound POP3 account. Use this page to configure an inbound POP3 e-mail account to use to receive returned mail associated with your e-mail activities.
- 1) Type a name for the account. This is displayed to the marketing manager during the e-mail activity creation process.
  - 2) Type a brief description for the account.
  - 3) Type the host name of the POP3 server to connect with. This is the host name of the POP3 server that is used to retrieve e-mails that are undeliverable.
  - 4) Type the e-mail address to use on the POP3 server. This is the e-mail address that the undeliverable e-mails are sent to.
  - 5) Type the login ID to the POP3 server.
  - 6) Type the password for the account.
  - 7) Type the port number on the POP3 host which accepts POP3 requests. The default is 110.
  - 8) Type the fully qualified host name of the commerce server.
  - 9) Type the time at which the account should begin retrieving new mail. This is a 24 hour clock.
  - 10) Click **OK** to save the e-mail activity configuration.
4. Now you are going to create a new e-mail activity using the WebSphere Commerce Accelerator.
- a. Open the WebSphere Commerce Accelerator.
  - b. If you have not selected a store, do so now. Depending on your user role, one or more menus display.
- a. From the **Marketing** menu, click **Email Activity**. The Email Activity window displays, containing a list of the currently defined coupon e-mail activities.
- 1) Click **New**. The Email Activity wizard displays.
  - 2) Type a name for the e-mail activity. This is displayed in the e-mail activity list. Type FashionFlow women's fashions test.
  - 3) Type a description for the e-mail activity. Type This is a test to see if the e-mail activity is successful. Come buy our women's fashions!

- 4) Select a customer profile to send the e-mail activity to. This list is populated with the customer profiles defined for the store. This information is predefined in the customerprofile.xml. In this case, select **Our women's fashions**. So, if a customer has chosen to receive promotional e-mails, and has selected women's fashions, they will receive this e-mail.
  - 5) Select an e-mail template to send using the e-mail activity. This list is populated with the e-mail templates. In this case, select **EmailTemplateFFWomenDisplayView**.
  - 6) Select when you want to start the e-mail delivery. The default date is the current date. The time is the time you set when you configured your outbound e-mail activity account in the Administration Console. **Note:** You cannot set the time to be in the past.
  - 7) Click **OK**. This creates a scheduler job. The e-mail activity is displayed in the Email Activity list.
- b. Once the e-mail has been sent, the status changes from *unsent* to *sent*. This, however, does not reflect successful delivery to the customer, just successful sending. The log will say if the e-mail was delivered successfully. The default log location is: *WAS\_userdir/logs/WC\_instancename*

## Registering to receive promotional e-mails

1. In the FashionFlow store, click **Register**. The Registration page displays.
2. Enter a valid e-mail address. Enter the remainder of the information in the registration fields.
3. At the bottom of the page, you see a box that says **Send me e-mails about specials and featured clothing**. You check that box. **Note:** If you do not check this box, even if you select an interest below, you will not receive it.
4. Underneath that box, you select **specials**, and **women's fashion**.
5. Click **Submit**. The My account page displays.
6. You decide you don't want to shop after all today, so you exit.
7. A couple of days later, because you selected to receive e-mails, and you checked women's fashions, you receive an e-mail from FashionFlow. Here is a sample:  
 Hi (recipient's name),  
 Wondering what the new styles are this season? Thinking it's time you treated yourself to some new clothes? We have some great new women's fashions that just arrived!  
 If you have changed your mind, and no longer wish to receive e-mails about our new arrivals and special promotions, please click the **remove** button below.

## Reference: Sample of how to create an e-mail account in an SMTP server, using a Domino Server machine as an example

1. On the Domino Server machine, launch the Domino Administrator (Start >Programs>Lotus Applications>Lotus Domino Administrator).
2. Ensure that the server name is *xname*, where *xname* is the name of your Domino server.
3. Select **People & Groups**.
4. In the left frame, click **People**.
5. In the right frame, click **Add Person**.
6. On **Basic**, type the following info:

- a. First name
- b. Last name
- c. User name - you could use your e-mail name
- d. Internet password - choose a password
7. On **Mail**, type the following info:
  - a. Mail system - select POP or IMAP
  - b. Mail server - type the Domino server host
  - c. Mail file - type `mail/username`
  - d. Internet address
8. Click **Save and Close**.
9. Create a mail file for this user by selecting 'File/Database/New' from the pull down menu.
10. In the New Database window, type the following information:
  - a. Server - select the Domino server host
  - b. File name - type the Mail file from above
  - c. Template list - select **Mail (R5.0)**
11. Click **OK**.
12. The new mail database will be created and opened. Close the mail introduction page by clicking **ESC**.
13. You should now see the inbox of the mail file created. Select **File/Database/Access Control** from the pull down menu.
14. Click **Add**.
15. Click the **Person** icon.
16. Select the user that you just created from the list and then click **Add**, and then **OK**.
17. In the Access Control List window, select the user, and make the following changes:
  - a. User Type - select **Person**
  - b. Access - select **Editor**
  - c. Delete Documents - put a checkmark for this option
  - d. Other checkboxes - should already be checked
18. Click **OK**.
19. You can close the inbox view by clicking **ESC**.
20. You have now created a user on the Domino server which can be used to receive e-mail, or to send mail.

---

## Using Product Exploration and Product Comparison

### Demonstrates

This tutorial illustrates the following features of FashionFlow:

- Product Exploration
- Product Comparison

### Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. You must also enable Product Advisor. For more

information, see *Publishing a store archive from the Administration Console* and *Changing store flows using WebSphere Commerce Accelerator* in the WebSphere Commerce online help.

## Using Product Exploration and Product Comparison

In the following tutorial, you are looking for a pair of pants for your mother. When looking at the Women's Fashion categories, you find a Pants and shorts category. When you click on this link, you notice that you can use a tool called Product Exploration to help you narrow your search. You decide to use this tool to help you find the right pair of pants.

To start shopping, do the following:

1. In the FashionFlow store, click **Women's**. The Women's fashions page, listing all of the product categories, displays.
2. You are looking for a pair of pants, so click the **Pants and shorts** link. The Pants and shorts page displays, listing all of the pants and shorts available.
3. To narrow the options available, you decide to use the product exploration tool. Click the **Product Exploration** link.
4. The Product Advisor - Product Exploration page displays. Notice that there are currently 117 items available. By selecting specific criteria for the pants you want, you can reduce this number considerably, making your search easier.
5. Your mother doesn't like wearing shorts. So, from the **Product** list, you select "Dress walking shorts", and then click the **not equal to** sign. The page refreshes. You still have too many items to choose from. You'd like to narrow your search further.
6. Your mother doesn't like khaki, so you decide to exclude khaki from the search. To exclude khaki, select it from the **Color** list, then click the **not equal to** sign. The page refreshes.
7. In the **Size** list, select your mother's size: **10R**. Click **=**. The page refreshes.
8. The list now contains only 5 items that match your search criteria. To compare these results, click **Compare results**.
9. The Product Advisor - Product Comparison page displays. The color, price, and size of the items that match your search results are listed. To view these items, click the corresponding product link.
10. If after viewing the products, you decide to purchase the pants, add them to your shopping cart, and check out. If you don't think your mother would like these pants, start your search again and use different criteria. Repeat steps 2 through 9.

---

## Search for products using advanced search

### Demonstrates

This tutorial illustrates the following features of FashionFlow:

- Advanced product search

### Prerequisite

Before starting this tutorial, you must have published a store based on a FashionFlow store archive. For more information, see *Publishing a store archive from the Administration Console*.

## Using advanced search

Before you start shopping at FashionFlow, you have two purchases in mind: a navy dress shirt for your father, and a summer dress for your sister. Since you don't have much time to browse the store, you will use the advanced search in FashionFlow to see if the store carries these products.

To find the perfect shirt and summer dress, do the following:

1. From the left navigation bar in the FashionFlow store, under the heading **Search**, click **Advanced search**. The Advanced search page displays. The first product you will search for is the navy dress shirt for your dad.
2. In the **Search for** field, type dress shirt. From the list, select **the exact phrase**.
3. Since your father does not like short sleeved shirts, in the **Exclude the words** field, type short sleeved. From the list, select **the exact phrase**.
4. In the **Located in** list, select **product name and description**.
5. In the **Search in** list, select the category, **Men's: Shirts and tops**.
6. Since cost is not an issue when buying a gift for your father, do not enter anything in the **Price range** fields.
7. In the **Attributes** section, type the following:
  - a. **Color:** navy
  - b. **Size:** large
8. Leave the **Display** results per page at the default (10).
9. Click **Submit**.
10. The results of your search display in the Search results page. If you think any of the results meet your needs, click the link to view the shirt and further product information, then add the shirt to your shopping cart. If the results do not meet your needs, repeat steps 1 through 9 with different search criteria and try again.
11. When you are finished viewing the results of your search and have added the shirt to your shopping cart, return to the Advanced search page. You will now search for a summer dress for your sister.
12. In the **Search for** field, type summer dress. From the drop down list, select **all of the words**.
13. Since your sister does not like sleeveless clothes, in the **Exclude the words** field, type sleeveless. From the list, select **any of the words**.
14. In the **Located in** list, select **product name and description**.
15. In the **Search in** list, select the category, **Women's: Dresses and skirts**.
16. Since you only have 65 dollars left in your budget for gifts, in the **Price range** fields, type 35 and 65.
17. In the **Attributes** section, specify the following:
  - a. **Color:** leave this blank, as you don't want to limit your search to a particular color.
  - b. **Size:** small
18. Change the **Display** results per page to 25.
19. Click **Submit**.
20. The results of your search display in the Search results page. If you think any of the results meet your needs, click the link to view the summer dresses and

further product information, then add the dress to your shopping cart. If the results do not meet your needs, repeat steps 12 through 19 with different search criteria and try again.



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## Chapter 8. MiniFashion sample store overview

MiniFashion is a new consumer direct sample store that provides a minimal set of assets needed to make a consumer direct store work. This is offered as an alternative to deleting large amounts of information from our existing consumer direct sample (FashionFlow); instead, the customer can use this sample as a foundation for a basic consumer direct store, and then build on it.

MiniFashion contains only the following features:

- One currency
- One supported language
- One fulfillment center
- Store default contract
- One category
- One product
- Two items for the product
- One shipping method
- Simple storefront and shopping flow, including shopcart and checkout

MiniFashion is packaged with WebSphere Commerce as a store archive. By default, this store archive will not be shown in the Administration Console options. To publish this store, copy the sample store archive from `WC_installdir/samples/stores/BasicStore/BasicStore.sar`. Paste it to: `WC_installdir/instances/instancename/sar/BasicStore.sar`. You may need to create the `/sar` directory if it does not already exist. Now `BasicStore.sar` will appear as a publishing option in the Administration Console.

When publishing this store, do not select to publish it under Default Organization.

 You should create an organization first, using the Organization Administration Console, before publishing `BasicStore.sar`.

Since store creation in WebSphere Commerce is based upon selecting a sample store archive and modifying it, MiniFashion is designed to act as the basis for your store. It offers a minimal shopping flow. The sample store pages can be customized. All MiniFashion sample store pages are JavaServer Pages. These pages include HTML, Java, and JavaScript. The JSP files can be cached.



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## Part 4. B2B direct sample (ToolTech)

**Business** WebSphere Commerce provides you with a B2B direct sample. This part includes the following information:

- B2B direct sample information
- ToolTech overview and set up information
- ToolTech use cases
- ToolTech tutorials



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## Chapter 9. B2B direct sample store archives

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### B2B direct store archives and access control

What follows is a description of the organization and roles that are created in the three stages of setting up your sample: instance creation, SAR publish, dynamic entities.

#### Organization structure and instance creation

In order to allow customers or buyers to access your site, browse your catalog, and place orders; or to allow employees to administer the site, including updating the catalog, creating new promotions, or managing orders; or to allow resellers or other business partners to complete transactions on your site, all actors in your business scenario must be assigned a position in the WebSphere Commerce organization structure.

The WebSphere Commerce organization structure provides a framework for the actors, or entities, in your business scenario. This framework is organized in a hierarchical structure, which mimics typical organizational hierarchies with entries for organizations and organizational units and users. The organizations and organizational units in the framework act as owners for the parts of your business. All parts of your business, including customers, administrators, stores, catalogs and distributors, must be owned by an organization or organizational unit.

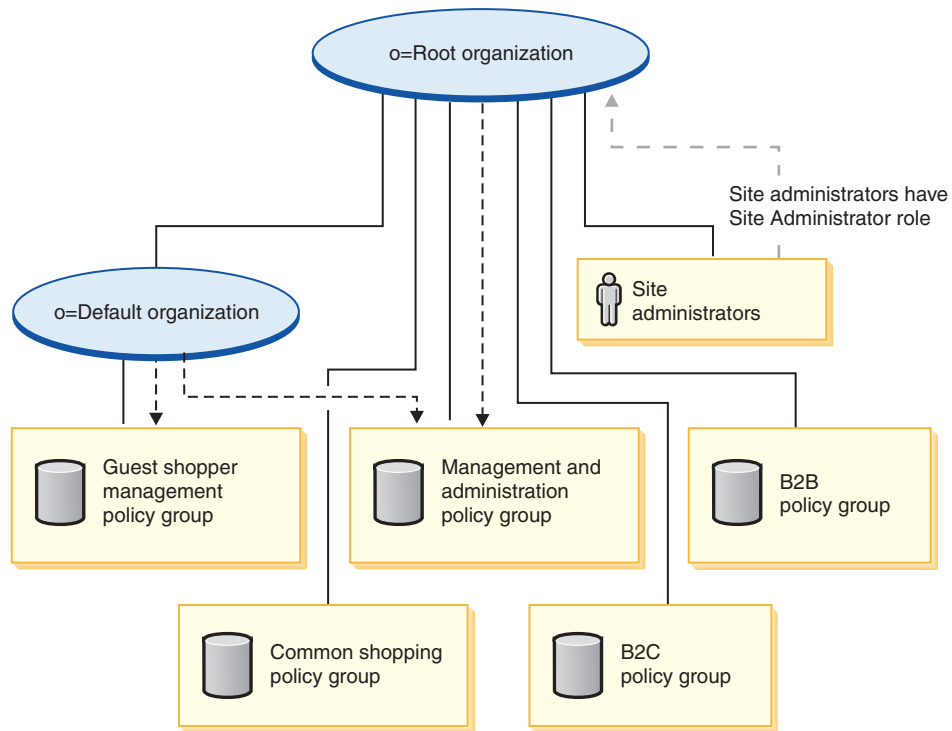
The organization structure and the access control model are closely related, in that the access control model applies access control policies to organizations rather than to different entities (stores, customers, administrators, and so on). The policies that apply to an entity (or resource) are applied to the organization that owns the entity or resource.

The following diagram outlines the basic WebSphere Commerce organization structure with access control.

- **Root organization:** The root organization is the top level organization and is its own parent. All organizations in the WebSphere Commerce organization structure are descendents of the root organization. In this example the site administrators are owned by the root organization.
- **Default organization:** The default organization is under the root. All guest customers and all customers in consumer direct businesses belong to the default organization.
- **Child organizational entities:** One or more other levels of organizational entities can exist beneath the parent organizational entities. You can add as many child organizational entities as necessary to support your business.

The WebSphere Commerce access control structure is flexible enough to support all entities in the supported business models. During instance creation, only the root organization and default organization are created. The basic access control structure is installed during instance creation, regardless of the business model.

## Basic access control



### Legend



The root organization owns the following default policy groups:

- Management and administration
- Common shopping
- B2C
- B2B

The default organization owns the following default policy groups:

- Guest shopper management

However, the root organization only subscribes to the management and administration policy group. The policies in this policy group apply to all of the resources owned by this root and its descendants, except for those descendants that subscribe to a policy group. Since the default organization subscribes to the policy groups, the policies from the root organization are not inherited. For the default organization, the policies in the management and administration and guest shopper management policy groups are applied to any resources owned by the default organization.

For more detailed information on the default policy groups, see the appendix of the *IBM WebSphere Commerce Security Guide*.

## B2B direct store archives

The B2B direct sample (ToolTech) includes an online hardware store, which supports direct selling to other businesses. ToolTech highlights the tasks a buyer can perform at a seller's e-commerce site.

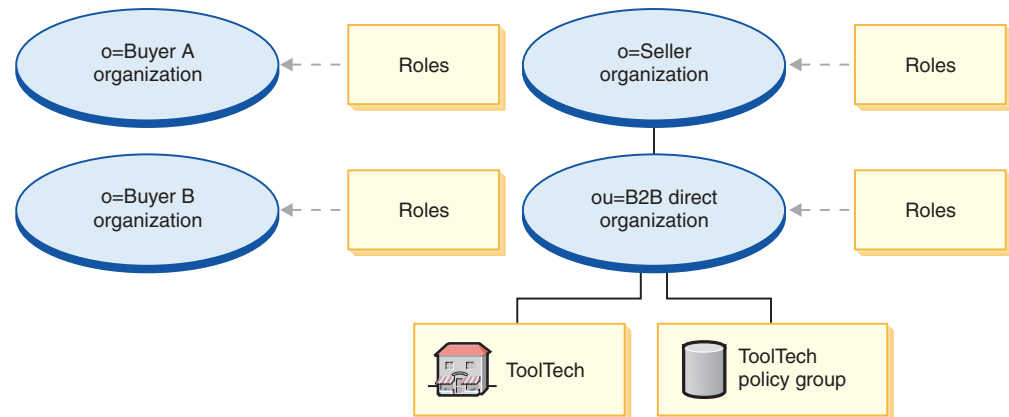
The following SAR files are associated with the B2B direct business model:

Table 11. B2B direct

Store archive name	Description
B2BDirect.sar	A sample composite store archive containing the organization structure, predefined user roles, and necessary access control policies to create business direct environment, plus a feature-rich working store.
B2BDirectOrganizationStructure.sar	A sample store archive containing the organization structure, and predefined user roles to create a B2B direct environment.
B2BDirectSite.sar	A sample store archive containing all the necessary assets and access control policies to create a feature rich working B2B direct store.

The roles on an organization indicate the possible roles that a user can play within the organization. For more information on roles, see the WebSphere Commerce online help.

### B2BDirect.sar contents



- Two buyer organizations and roles: Buyer Administrator, Buyer Approver, Buyer (Buy-side), Procurement Buyer, Procurement Buyer Administrator
- Seller organization and roles: Account Representative, Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Logistics Manager, Marketing Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Returns Administrator, Seller Administrator, Seller, Store Administrator, Registered Customer
- Business Direct Organization (B2B) and roles: Account Representative, Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Logistics Manager, Marketing Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Returns Administrator, Seller Administrator, Seller, Store Administrator, Registered Customer
- ToolTech (sample store)

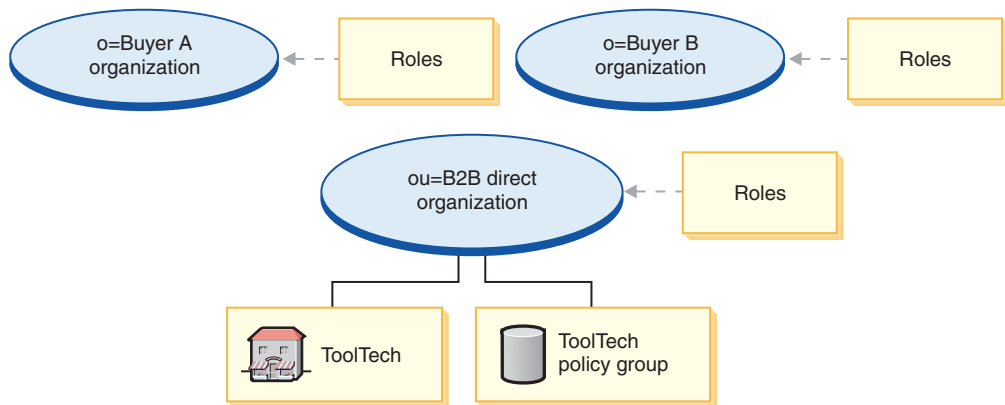
- ToolTech policy group

### B2BDirectOrganizationStructure.sar contents



- Seller organization and roles: Account Representative, Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Logistics Manager, Marketing Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Returns Administrator, Seller Administrator, Seller, Store Administrator, Registered Customer

### B2BDirectSite.sar contents



- Two buyer organizations and roles: Buyer Administrator, Buyer Approver, Buyer (Buy-side), Procurement Buyer, Procurement Buyer Administrator
- Business Direct Organization (B2B) and roles: Account Representative, Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Logistics Manager, Marketing Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Returns Administrator, Seller Administrator, Seller, Store Administrator, Registered Customer
- ToolTech (sample store)
- ToolTech policy group

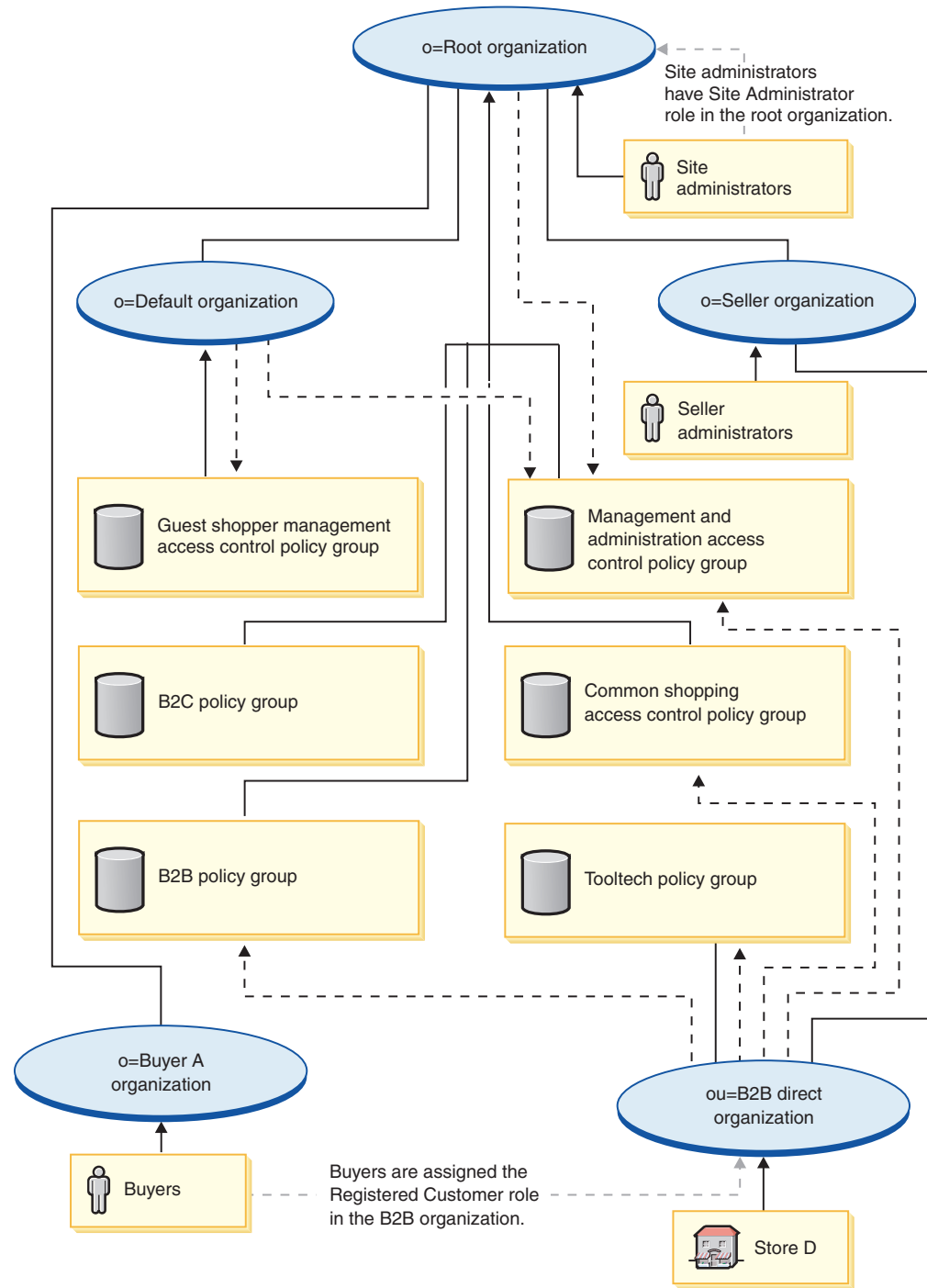
## Dynamically created roles

*Customers* are given the role of Registered Customer in the organization that owns the store to which they register (for example, ou=B2B Organization). *Buyers* are given the role of Registered Customer in the organization that owns the store to which they are registered as a buyer. This information is picked up from the MemberRegistrationAttributes.xml file. For more information, see "Roles and the MemberRegistrationAttributes XML file" on page 40 for the WebSphere Commerce online help.

The following diagram describes a basic B2B direct organization and access control structure.



## Basic access control



### Legend



In this diagram, describing a basic B2B direct organization structure, the root organization owns and subscribes to the default policy groups as described in 112.

The root organization only subscribes to the management and administration policy group. As a result, these policies apply to the Site Administrators, who are directly under the root, as well as to the seller organization, and the seller administrators. These policies do not apply to the default organization, since the default organization subscribes to the management and administration and guest shopper management policy groups directly. Nor do they apply to the B2B direct organization and the stores owned by that organization, as the B2B direct organization subscribes directly to the B2B, management and administration, and the common shopping policy groups.

The B2B direct organization also owns and subscribes to the ToolTech policy group. The ToolTech policy group contains the following policies:

- AllUsersForToolTechExecuteToolTechAllUsersViews
- RegisteredCustomersForOrgForToolTechExecuteToolTechRegisteredCustomerViews

Buyers are customers that place orders in a B2B direct store. All buyers must be owned by a buyer organization. Typically, buyer organizations do not subscribe to any policy groups, since management and administration policies inherited from the root organization are sufficient.

Since access control policy groups are subscribed by organizational entities, if you are creating multiple stores in your site, and want to apply different access control policy groups to individual stores, you must create separate organizations to own each store.

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## Chapter 10. B2B direct sample store (ToolTech) overview

The B2B direct sample (ToolTech) includes an online hardware store, which supports direct selling to other businesses. ToolTech highlights the tasks a buyer can perform at a seller's e-commerce site. Some of the features included in the ToolTech sample store are:

- Contract-based purchasing
- Requisition lists
- Contract-based pricing
- RFQ requests
- Split orders and backorders
- Multiple shipping addresses
- Weight-based shipping
- Product search capability
- Buyer registration
- Collaboration workspaces
- Customer care
- Adding your organization's logo to the store
- Account-based marketing campaigns

ToolTech provides all the pages and features necessary for a functioning B2B direct online store. ToolTech is packaged with WebSphere Commerce as a store archive (as the composite: B2BDirect.sar). In some cases, publishing a store archive to a WebSphere Commerce Server allows you to create a running store. In WebSphere Commerce, Business Edition, sample store archive files are also used to package and deliver organization structures, predefined user roles, and access control policies necessary to create the environment for your store or site, as well as collections of store assets that create a catalog or a storefront. In order to create a running store, you can publish one of the composite store archives. You can also publish a sequence of component store archives to publish a running store. Stores are published from the Administration Console; only Site Administrators can publish a store archive by selecting Site, and from the Store Archives menu, selecting Publish. The Store Archives page then displays listing the store archives available for publish. By default, the page showing composite store archives displays. For more information on publishing a store archive, see the WebSphere Commerce online help publishing information.

Since store creation in WebSphere Commerce is based upon selecting a sample store archive and modifying it, ToolTech is designed to act as the basis for your store. It is based on a typical shopping flow. The sample store pages can be customized. All ToolTech sample store pages are JavaServer Pages. These pages include HTML, Java™, and JavaScript™. The JSP files can be cached.



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## Chapter 11. Creating a store using the ToolTech sample store

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### Part one: Publish and configure a store based on ToolTech

To create a store using the ToolTech sample store, you must publish it, and then, optionally, you may configure it. For information on how to publish and configure a sample, see “Part one: Publish and configure a store based on FashionFlow” on page 29, *Publishing a store using the Administration Console* and *Configuring a store using the WebSphere Commerce Accelerator*, substituting ToolTech for FashionFlow, when necessary.

After publishing a sample store, you may be required to perform additional steps to get the store running at full functionality. Those steps follow.

---

### Part two: Creating scheduled jobs for a sample store

After publishing a sample store, scheduled jobs needs to be created for the store in the WebSphere Commerce Accelerator. For details on how to configure e-mail notification for a sample store, see “Part one: Publish and configure a store based on FashionFlow” on page 29.

---

### Part three: Configuring e-mail notification for a sample store

This procedure enables customer e-mail notification when payment is authorized, when an order is authorized, and when an order is cancelled. Note that you must have a mail server set up in order to e-mail customers. For details on how to configure e-mail notification for a sample store, see “Part four: Configuring e-mail for your site” on page 166.

---

### Part four: Enabling and disabling RFQs

Before you can use the RFQ trading mechanism, the Site Administrator must enable RFQs using SQL scripts that can be found in the WC directory created as part of the WebSphere Commerce installation process. To enable RFQs, see *Enabling and disabling the RFQ trading mechanism* in the WebSphere Commerce online help.

RFQ notification messages are used to notify customers of key events that take place during RFQ negotiations. To enable RFQ notification messaging, see *Enabling RFQ notification messaging* in the WebSphere Commerce online help.

For a tutorial on RFQs, see “Using RFQs” on page 137.

---

### Part five: Creating a marketing campaign

In the ToolTech store you can create campaigns based on the accounts to which you belong. To create an account based marketing campaign you must do the following:

- Create customer profiles.
- Create the campaign.
- Create campaign initiatives.
- Create e-marketing spots.

## Create customer profiles

To create customer profiles do the following:

1. Logon to the WebSphere Commerce Accelerator.
2. Click **Marketing > Customer Profiles**. The Customer Profiles page displays.
3. Click **New**. The General page displays.
4. Type in a name for your customer profile in the text box, such as Woodworking Companies.
5. On the left navigation frame, click on **Registration > Registration Status**. The Registration Status page displays.
6. Select **Registered**.
7. On the left navigation frame, click on **Account > Accounts**. The Accounts page displays.
8. Select **Customer must belong to one of the selected accounts**.
9. Add the available accounts to the “Selected accounts” box by clicking **Add**.

**Note:** Account 1 is for Organization A, and Account 2 is for Organization B.

10. Click **OK**, at the bottom of the page. You will be brought back to the Customer Profile page where you can see the profile you just created.

## Create the campaign

To create the campaign do the following:

1. Click **Marketing > Campaigns**. The Campaigns page displays.
2. Click **New**. The General Definition page displays.
3. Type in a campaign name and description in the text boxes provided. For example, Woodworking Tools, Discount on woodworking tools.
4. Click **Next**, at the bottom of the page. The Business Objectives Definition page displays.
5. Type in your campaign sponsor and objectives in the text boxes if desired.
6. Click **Finish**, at the bottom of the page. Your campaign has been successfully created.

## Create campaign initiatives

To create campaign initiatives do the following:

1. Select the campaign you just created and click **Initiatives** on the right side-menu.
2. Click **New**. The General Definition page displays.
3. Type in a name for your initiative in the textbox.
4. Select your campaign in the Campaign drop-down box.
5. On the left navigation frame, select **What**, then click **Next**. The Defining displayed dynamic content page displays.
6. Select **Suggest specific product(s)**.
7. Click **Find** or **Browse** to choose products.
8. Select **Who**, then click **Next**. The Defining target customers page displays.
9. Select **Target specific customer profiles**.
10. Add the available customer profiles to the “Selected Customer profiles” box by clicking **Add**.
11. Click **Next** at the bottom of the page. The Defining dates for targeted customers page displays.

12. Select a defining date option if desired.
13. Click **Next**. The Defining target customer behaviors page displays. To create a customer behavior click **Add** and follow the online help instructions.
14. Click **Finish**. Your campaign initiative has been successfully created.

## Create e-Marketing spots

To create e-marketing spots do the following:

1. Click **Marketing > E-Marketing Spots**. The e-Marketing spots page displays.
2. In the list of items select "StoreHomePage" and click **Schedule** on the right sidebar menu. The Campaign initiative scheduling page displays.
3. Click **New**. The Schedule Campaign Initiatives page displays.
4. In the "Selected campaign" drop-down box select your campaign.
5. Add the campaign initiatives you created earlier to the "Selected Campaign Initiatives" box by clicking **Add**.
6. Add a starting date for your campaign.
7. Choose an end date or select **Run this campaign initiative indefinitely**.
8. Click **OK** at the bottom of the page.

Logon to the ToolTech store using the Organization you selected when creating customer profiles. You should now be able to see the specific products you selected in the ToolTech Home page.

---

## Part six: Setting up WebSphere Commerce Payments for your store

For information on setting up WebSphere Commerce Payments, refer to the WebSphere Commerce online help.

If you have WebSphere Commerce Payments set up, and would like to test a payment, do the following:

1. Register and shop at the store.
2. Add an item to your shopping cart.
3. Checkout.
4. To complete your order, enter your credit card information. For the purposes of this test, enter the following:
  - a. From the **Credit card type** drop down list, select **Visa** (assuming it is in your WebSphere Commerce Payments account).
  - b. In the **Card number** field, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2003.
  - e. Click **Order now**. The Order confirmation page displays, stating the details of your order.

### Notes:

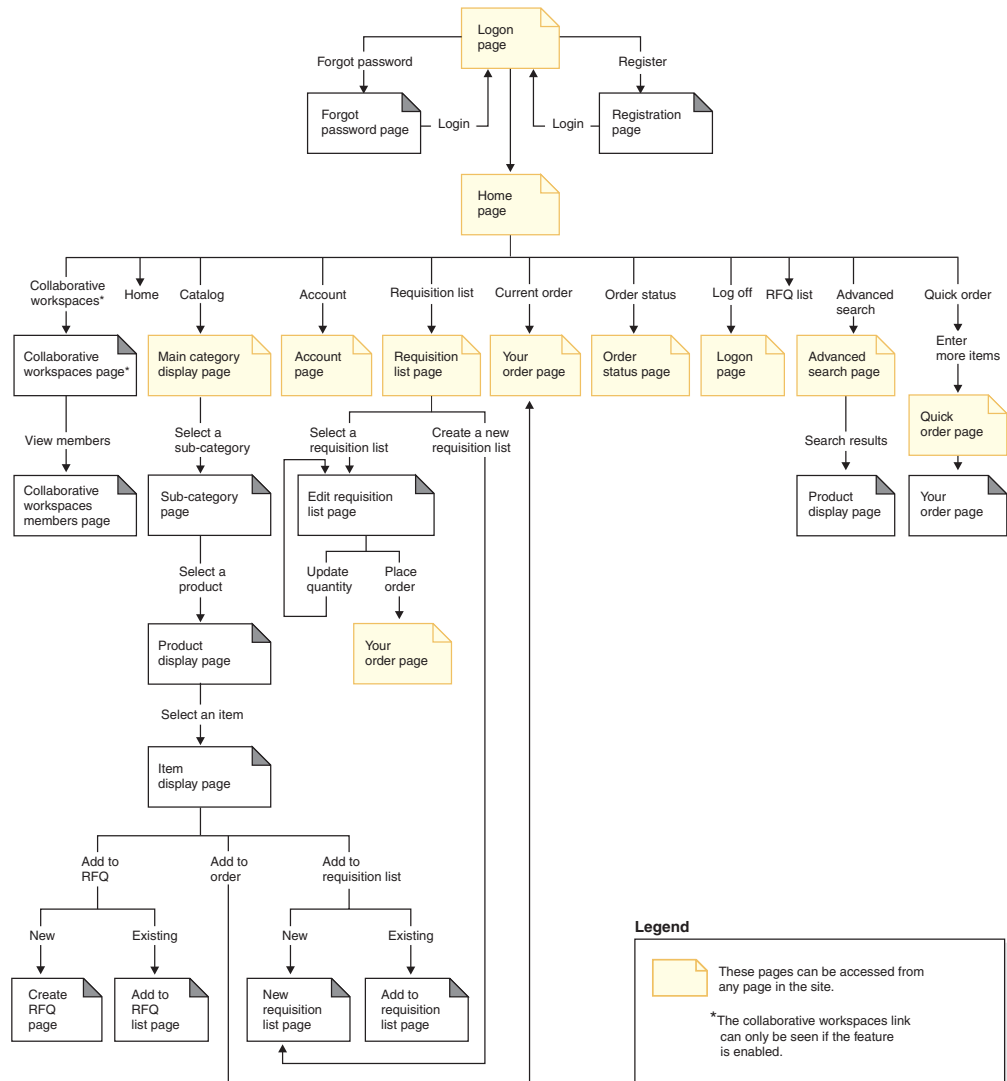
1. If WebSphere Commerce Payments was not installed or not running at the time of publishing, the brand types configured in WebSphere Commerce Payments should match the brand types specified for contract 3456 for Credit Card.
2. If you want to use collaboration features with the ToolTech store, you must first install Lotus Sametime for the Customer Care feature, or Lotus QuickPlace for the Collaborative Workspaces feature. For more information on the installation of Lotus Sametime and Lotus QuickPlace refer to the *IBM WebSphere Commerce Additional Software Guide*.

- If customers are using a double-byte language and type lengthy information into text fields, they may encounter an error due to the length of the entry exceeding what is allowed in that field. To correct this, you may want to add code to limit the UTF8 string length that customers type in.

## ToolTech store flows

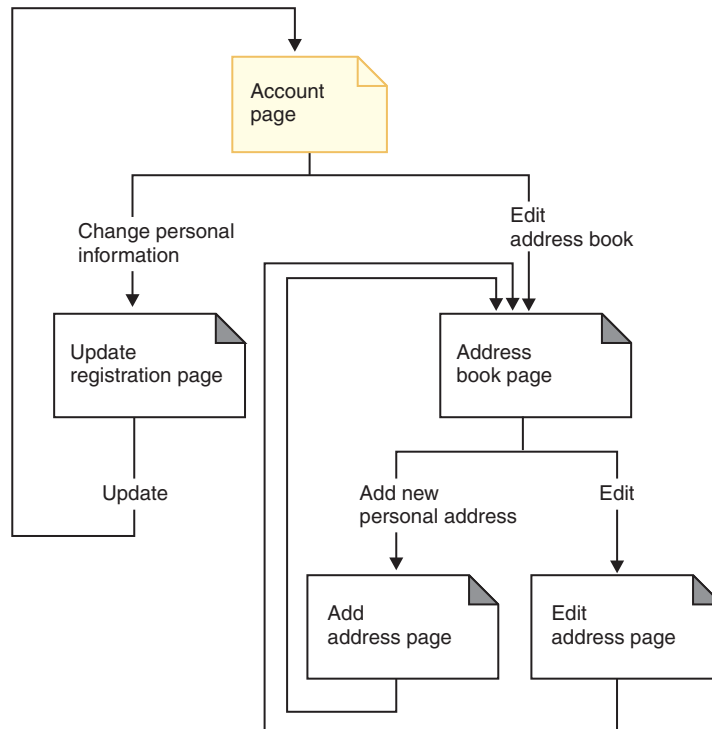
**Business** The following diagrams show the ToolTech store flow, account flow, RFQlist flow (in two parts) and the RFQ modify flow.

### ToolTech store flow

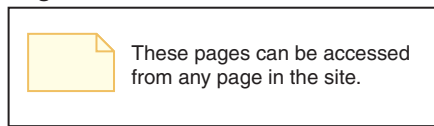




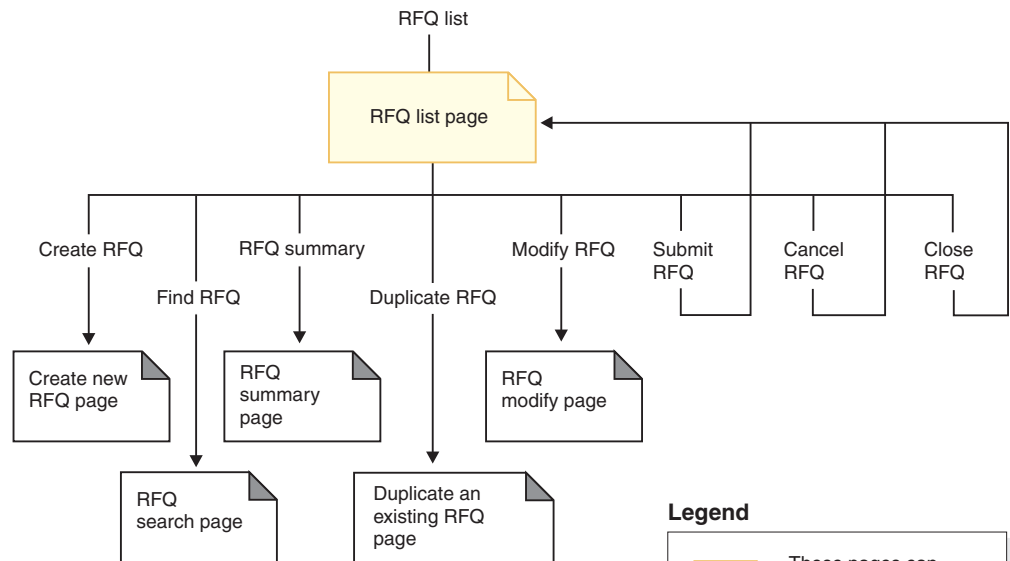
### ToolTech account flow



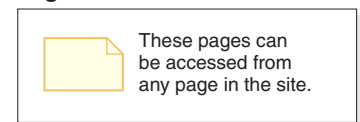
#### Legend



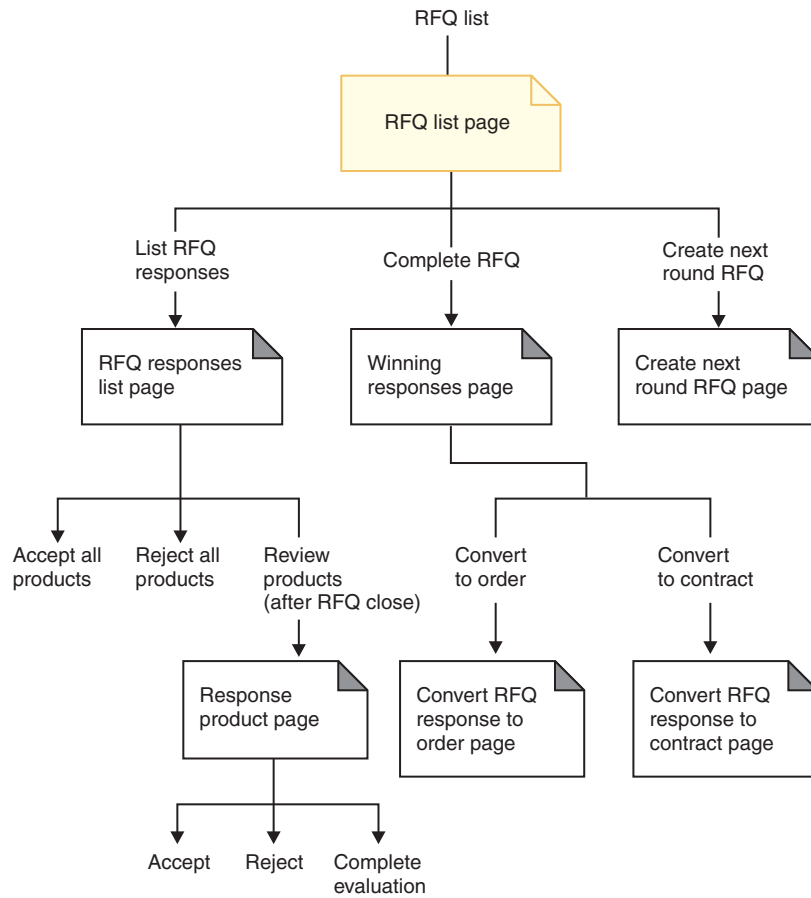
### ToolTech RFQ list flow (part one)



#### Legend



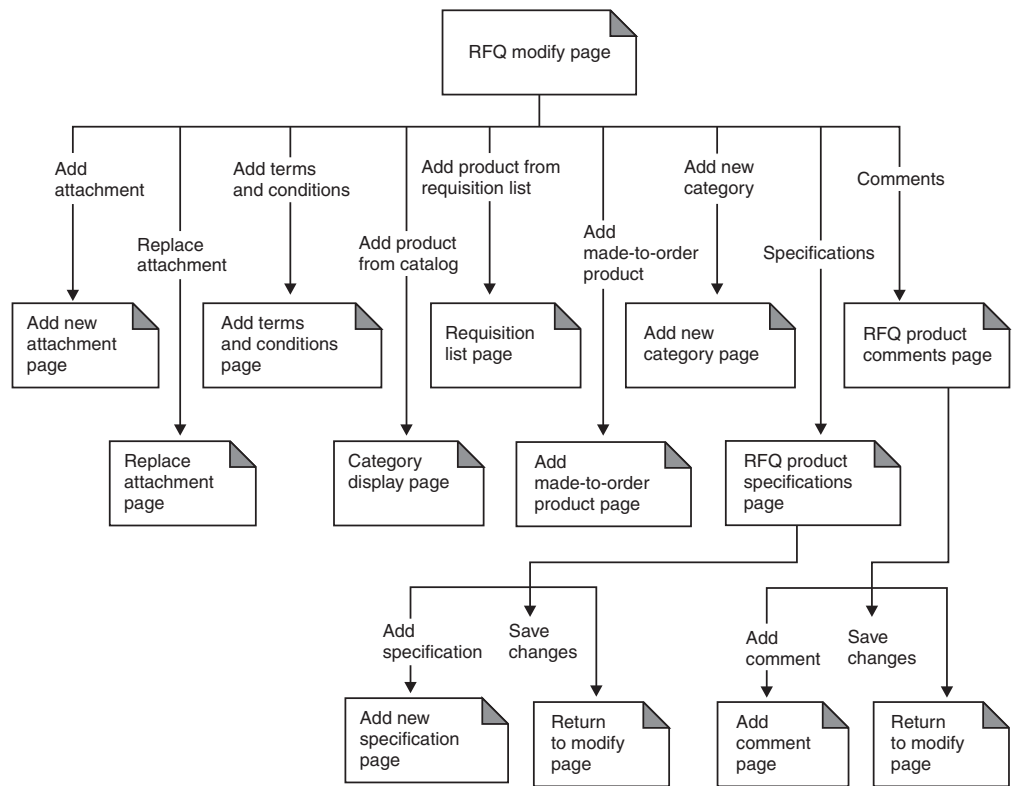
## ToolTech RFQ list flow (part two)



### Legend



## ToolTech RFQ modify flow





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## Chapter 12. ToolTech use cases

The ToolTech sample store comes with use cases that follow customers through registration, logon, shopping, and order completion. These use cases can help you to understand the flow of the ToolTech sample store, and can be used as a guide for creating use cases for your own store.

---

### Register a new customer

This use case will describe the functional flow of events when a customer registers in the ToolTech store.

#### Precondition

The customer accesses the store site using a supported browser.

#### Basic flow

1. The system displays the Logon page.
2. The customer clicks **Register** and is transferred to the Registration page.
3. The customer completes the User ID, Password, Verify password, Employee ID, Last Name, Buyer Organization, Address, City, State/Province, Country/Region, ZIP/Postal code, E-mail address, Preferred currency, and Preferred language fields, as well as any other optional fields desired.
4. The customer clicks **Submit** and submits the information.

#### Exception flow

1. The customer leaves the **Buyer Organization** field blank
2. The system registers the customer as a business user.
3. The system displays a message indicating that the customer will be treated as a default user and not a business user.

#### Postcondition

The customer is waiting for approval to shop in the store from the Buyer Approver.

---

### Logon by a registered customer

This use case will describe what the functional flow of events are when a registered customer logs onto a seller's Web site.

#### Preconditions

The customer has previously registered with the store, and accesses the store site using a supported browser.

#### Basic flow

1. The system displays the Logon page.
2. The customer selects a shopping language and enters their user ID and password in the **User ID** and **Password** fields.

3. The customer clicks **Submit** and the information is submitted.
4. The customer is transferred to the Home page of the store after logging on is finished.

#### **Alternate flow**

The customer forgets their password and would like to reset their password.

1. The customer selects the **Forgot Your Password?** link.
2. The system displays the Forgot Password page.
3. The customer enters their User ID in the appropriate field.
4. The customer clicks **Send My Password** and the information is submitted.
5. The system sends the password to the customer's e-mail address.
6. A confirmation message is displayed.
7. The customer can transfer to the Logon page after they have received their password.

#### **Exception flow**

The customer's e-mail address does not match with those in the system. The system displays an error message and prompts the customer to enter another user ID.

---

## **Edit an address book**

Customers can edit addresses in their address book.

#### **Actor**

Customer

#### **Main flow**

The customer selects an address from address book to edit. The system retrieves and displays the selected address details:

- Nickname
- First name
- Last name
- Street address
- City
- State or Province
- ZIP code or Postal Code
- Country or Region
- Phone number

The customer makes the desired changes and clicks **Submit**. The system updates the address (E1).

#### **Alternate flow**

None

#### **Exception flows**

**E1: The system notifies the customer of missing mandatory information, and requests the missing information which can include the following:**

- First name
- Last name
- Street address
- City
- State or Province
- ZIP code or Postal Code
- Country or Region

If the nickname already exists in the address book, an error message will be displayed.

Customer enters missing mandatory information.

---

## Add items to an order

This use case describes the functional flow of events when a customer adds items to an order.

### Pre-condition

The customer is logged on to the store.

### Basic flow

1. The customer clicks **Browse Catalog** from the Home page and is transferred to the Main Category page.
2. The customer selects a category and is transferred to the category display page.
3. The system displays a page with the top category chosen and the main categories beneath it.
4. The customer selects a product and is transferred to the Product Display page.
5. The system displays a page with items within the product line chosen
6. The customer selects an item and is transferred to the Item Display page.
7. The system displays a page with the item and all of its attributes.
8. The customer selects a contract and clicks **Add to Order**. If the customer does not select a contract, the item is added under the contract with the lowest price.
9. The customer is transferred to the Your Order page.

### Post-condition

The system displays a page with the new item added to the order. If the item is the first one chosen, a new order is created with the item in it.

---

## Update personal information

This use case will describe what the functional flow of events are when a customer updates their personal information.

### Pre-condition

Customer is a registered buyer and is logged on in the store.

### **Basic Flow**

1. The customer clicks on **Account** in the header.
2. The system displays the Account page.
3. The customer clicks **Change Personal Information** and is transferred to the Update Registration page.
4. The system displays the fields with pre-filled information.
5. The customer alters the fields as needed. (If the **Password** field is left empty the current password is maintained.)
6. The customer clicks **Update** and the information is submitted.
7. The Account page displays upon successful submission.

### **Post-condition**

The system updates the edited fields.

**Exception flow:** If something is entered incorrectly, the Change Personal Information page should display an error message.

---

## **Approve a buyer**

This use case describes what the functional flow of events are when a Buyer Approver gives approval to a customer to shop in the store.

### **Pre-conditions**

The approval feature has been enabled, and the customer has registered in the store and is waiting to begin shopping. The Buyer Approver has logged into the store.

### **Basic flow**

1. The system displays the Home page.
2. The Buyer Approver clicks **Go to Approval Tool** and is transferred to the Organization Administration Console.
3. The Buyer Approver clicks **Approval ->Approval Requests**, and a list of buyers which are pending approval is displayed.
4. The Buyer Approver verifies the correctness of the customer's information and approves or rejects the request for approval.

### **Post-condition**

An e-mail notification is sent to the customer.

---

## **Create a new requisition list**

This use case describes the functional flow of events when a customer creates a new requisition list.

### **Pre-condition**

The customer is a registered buyer and is logged into the store.

### **Basic flow**



1. The customer selects an item to purchase from the catalog and is transferred to the Item Display page.
2. Under the Requisition list heading, the customer selects the **new** radio button and clicks **Add to Requisition List**.
3. The customer is transferred to the New Requisition List page.
4. The system displays a page with an entry box to fill in a name for the requisition list and SKU# and Quantity fields.
5. The customer adds the required information to the fields, clicks **Save**, and the information is submitted.

#### **Post-condition**

A new requisition list is created.

#### **Alternate flow**

1. Customer selects item to purchase from catalog and is transferred to the Item Display page.
2. The customer clicks **Add to Order** and is transferred to the Your Order page.
3. The customer enters a name for the requisition list in the name field then clicks on **New Requisition List** and is transferred to the Edit Requisition List page.

#### **Post-condition**

The system creates a new requisition list and adds all the items with current quantities from the current pending order to this requisition list.

---

## **Add an item to a requisition list**

This use case describes the functional flow of events when a customer adds items to an existing requisition list.

#### **Pre-condition**

The customer has logged into the store and has created at least one requisition list.

#### **Basic flow**

1. From any page, the customer clicks **Requisition List** on the header and is transferred to the Requisition List page.
2. The system displays a list of the customer's requisition lists.
3. The customer selects a requisition list and is transferred to the Edit Requisition List page.
4. The system displays the items in the requisition list and fields to enter the SKU numbers and quantities of new items.
5. The customer fills in the fields with the appropriate information.
6. The customer clicks **Add** and the information is submitted.

#### **Post-condition**

The item is added to the requisition list and is displayed with the other items in the requisition list.

#### **Alternate flow**

1. The customer selects an item to purchase from the catalog and is transferred to the Item Display page.
2. Under the Requisition list heading, the customer selects the **existing** radio button and clicks **Add to Requisition List**.
3. The customer is transferred to the Add to Requisition List page.
4. The system displays a page with the customer's requisition lists.
5. The customer selects a requisition list, clicks **Add to Requisition List**, and is transferred to the Edit Requisition List page.
6. The system displays the current items in the list as well as the new one selected.
7. The customer clicks **Place Order** and the requisition list is saved.

#### **Post-condition**

The item is added to the requisition list and the customer completes the order or continues shopping.

---

## **Create an order from a requisition list**

This use case describes the functional flow of events when a customer creates an order from a requisition list.

#### **Pre-condition**

The customer is logged on to the store and is viewing the requisition lists.

#### **Basic flow**

1. The customer selects a requisition list from the list displayed on the Requisition List page.
2. The customer is transferred to the Edit Requisition List page.
3. The system displays all of the items in the requisition list selected.
4. The customer clicks Place Order and is transferred to the Your Order page.

#### **Post-condition**

The requisition list items are added to the order.

---

## **Create an order using a SKU**

This use case describes the functional flow of events when a customer creates an order using a SKU.

#### **Pre-condition**

The customer is logged into the store.

#### **Basic flow**

1. The customer enters a number in the **Enter SKU** field under the Quick Order heading in the left navigation frame and clicks **GO**.  
If the SKU is found, the Your Order page displays.  
If the SKU is not found, the customer is transferred to the Quick Order page.
2. The system displays a page with items entered for the current order.

### Post-condition

The order is updated with the items for which a valid SKU was entered. If there is no current order a new order is created.

### Exception

If the customer enters an invalid SKU, the system displays a message on the Quick Order page indicating that the SKU number entered was not found in the catalog.

---

## View all requisition lists

This use case describes the functional flow of events when a customer views all requisition lists.

### Pre-conditions

The customer is logged into the store and has at least one requisition list already created.

### Basic flow

1. From any page, the customer clicks **Requisition List** on the header and is transferred to the Requisition List page.
2. The system displays a list of requisition lists owned by the customer.
3. The customer selects the view type **All lists** and clicks **Go**.

### Post-condition

The system displays all of the requisition lists.

---

## Remove items from a requisition list

This use case describes the functional flow of events when a customer updates items in a requisition list that they own.

### Pre-condition

The customer has created at least one requisition list.

### Basic flow

1. From any page, the customer clicks **Requisition List** on the header and is transferred to the Requisition List page.
2. The system displays a list of requisition lists owned by the customer.
3. The customer selects a requisition list and is transferred to the Edit Requisition List page.
4. The system displays all of the items in the selected requisition list.
5. The customer clicks **Remove** beside the item they wish to have removed.

### Post-condition

The item we selected to remove is not displayed anymore.

---

## Search for a specific product

This use case will describe what the functional flow of events are when a registered customer searches for a specific product.

### Pre-conditions

None.

### Basic flow

1. The customer types in the name of a product in the **Search** field of the left navigation frame, and clicks **GO**.
2. The system displays the Search Results page.

### Alternate flow

1. The customer clicks **Advanced Search** on the left navigation frame and the system displays the Advanced Search page.
2. The customer searches for products based on words, categories, manufacturer, part number, or SKU by entering information in the appropriate fields. The customer can also select the number of results per page.
3. The customer clicks **Submit**.
4. The system displays the Search Results page.

### Post-condition

The search results are displayed.

---

## Schedule a recurring order

This use case will describe what the functional flow of events are when a registered customer wants to schedule a recurring order by using an existing order.

### Pre-conditions

The customer is logged into the store and a pending order is available. The customer has started to submit their order and is on the Order Summary page. For further information on submitting an order, see the related references below.

### Basic flow

1. Under the Scheduled order heading the customer selects the frequency of the order and when it becomes effective from the **Number of days effective from today**, and **Frequency** fields.
2. The customer clicks **Schedule Order**.
3. The system displays the following message on the Order Summary page:

A scheduled order has been created. You can now continue working on your current order. For more information on the scheduled order, see the Order Status page.

### Post-condition

The scheduler processes the order based on the frequency and effective date selected by the customer.

---

## Submit your order

This use case will describe what the functional flow of events are when a registered customer submits their order.

### Pre-conditions

The customer has at least one item added to the current order.

### Basic flow

1. The system displays the Your Order page.
2. The customer selects a payment method and clicks **Next**.
3. The system displays the Billing and Shipping Information page.
4. The customer selects a billing address from the **Billing address** drop-down box and clicks **Next**.
5. The system displays the Order Summary page.
6. The customer enters their payment information under the **Payment information** heading, clicks **Order Now**, and the order is submitted.
7. The system displays the Order Confirmation page.

### Post-condition

The order is placed.

### Alternate flow 1

The customer would like to remove an item from their order.

1. The system displays the Your Order page.
2. The customer clicks **Remove** beside the item they would like removed.

The item is removed from the order and the customer continues the *Submit your order* flow.

### Alternate flow 2

The customer has clicked **Order Now** on the Order Summary page and some of the items in the order are not available.

1. The system displays the Product Availability page with two shipping preference options:
  - Option 1-Ship the entire order when all items are available. (date available).
  - Option 2-Ship the available items now and ship the rest when they become available. (I understand that I may have to pay another shipping charge at this time, and some discounts may not be available.) (date available)
2. The customer chooses a shipping preference option.

### Alternate flow 2a

The customer selects Option 1 and clicks **Next**. The order is not split and all items are shown in the Order Summary page.

### Alternate flow 2b

The customer selects Option 2 and clicks **Next**. The order is split into available items and not available items, and the information of the two orders is shown on the Order Summary page. The customer can choose to process the available order and continues with the submit your order flow.

---

## View order history

This use case will describe what the functional flow of events are when a registered customer wants to view their order history.

### Pre-conditions

The customer is logged into the store.

### Basic flow

1. The customer clicks **Order Status** on the header.
2. The system displays the Order Status page with three sections:
  - Orders waiting for approval
  - Orders previously processed
  - Orders scheduled

Customers can view the order details by clicking on the order. Customers can re-order or cancel an order by clicking **Re-order** and **Cancel** respectively. For more information on the Order Status page, see the related links below.

### Post-conditions

The order history is displayed.

---

## Subcategory page troubleshooting

When you create a product in FashionFlow, ToolTech, Commerce Plaza, or Supplier Marketplace, you must specify a short description for it. When the subcategory page lists the product, the JSP file takes the short description from the database. If the short description is not specified, the subcategory page will not see the description of the product in the list.

---

## Chapter 13. ToolTech Tutorials

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### Using RFQs

#### RFQ request overview

**Business** Request for Quote (RFQ) is one of the trading mechanisms available in WebSphere Commerce. For RFQs, the buyer side is available on the ToolTech store. A buyer can create an RFQ for unique variations of goods and services that are either offered in the catalog or are not presently available in the catalog. If buyers cannot find a product matching their needs in the catalog, they can select attributes from the personalized attributes dictionary to precisely define the product specifications.

A requisition list can be used by buyers to add desired products to their RFQ. Buyers can include multiple products in one RFQ, and define unique specifications for each product. They can also specify the terms and conditions for the transaction. When the buyer submits an RFQ request, it is placed into a "Future" or "Active" state. Through the WebSphere Commerce Accelerator, the seller can view the RFQ and submit a response when the request is in an "active" state. A buyer can also change or cancel an RFQ.

When sellers respond to an RFQ, they have the option of responding to each attachment, terms and conditions, and product, as well as to each product specification or comment. They have the option of specifying a fulfillment center, or substituting a product if the buyer has provided that option in the request. A seller can also modify or cancel a response.

Once sellers have responded to the RFQ, the buyer closes the RFQ and evaluates the responses to choose a winner, or multiple winners. When the RFQ response is accepted by the buyer, and the seller is notified, the RFQ transaction is completed through one of the following processes:

- The buyer places an order that already contains the RFQ information.
- A contract already containing the RFQ information is created.
- The RFQ can go to next round.

A record of the RFQ is maintained in the RFQ List for a predetermined period, so the buyer can copy and RFQ that they can repeatedly use. Responses are retained for the same period to facilitate a seller's response to similar requests from the same buyer.

The Site Administrator makes the decision, during the setup of WebSphere Commerce, whether to enable the RFQ trading mechanism. If the decision is made to include the RFQ option, the Site Administrator must consider the following:

- Should approvals for the RFQ response process be enabled? If enabled, responses will be reviewed prior to transmittal to the buyer.
- Notification and job scheduling must be enabled to ensure that buyers and sellers are notified of changes in the status of RFQ requests and responses.

## RFQ response overview

When a buyer has activated an RFQ, the seller can respond to their terms and conditions and product descriptions specified by the buyer. The seller can either accept the RFQ as received, or present counterproposals.

Because the RFQ response information is part of the WebSphere Commerce Accelerator, more detailed information can be found in the WebSphere Commerce online help.

## Prerequisites

To complete this tutorial, you will need the following installed:

- IBM WebSphere Commerce Business Edition
- WebSphere Commerce Payments, installed as part of the WebSphere Commerce installation process if RFQ transactions will lead to orders
- ToolTech sample store
- Microsoft Internet Explorer

## Key features of WebSphere Commerce RFQs

The key features of the RFQ trading mechanism are:

### Buyer and buy-side

- RFQ request form
- Created RFQ requests automatically enter a draft status
  - Products are selected, at an SKU level, after browsing through the catalog or from a requisition list containing products selected from the seller's catalog. Products can also be added to the RFQ as made-to-order items if they cannot be found in the seller's catalog.
  - Free-form textural information can be added at an overview level on the General form, at a specific level on the Terms and Conditions form and on a product level on the Product Comments form
  - Additional product specifications can be added at a SKU (item) level
- RFQ requests can be modified in Draft status only
- RFQ requests can be canceled in a Draft, Future, Active or Closed state
- Requests, in any status state, can be duplicated
- Submitting an RFQ request places it into an Active or Future state
- Buyers can view:
  - A list of RFQ requests
  - RFQ request details
  - A list of RFQ responses to a specific request
  - RFQ response details

### Seller

- RFQ response wizard
- Created RFQ responses automatically enter a draft status. The product can be substituted in the RFQ response if the owner of the RFQ allows the substitution of products in the response.
- Free-form textural information can be added at an overview level as a Remark on the General form and as detailed responses to a buyer's Terms and Conditions and Product Comments on the relevant response forms



- RFQ responses can be modified in Draft status only
- RFQ responses can be placed in a Retracted state to facilitate review prior to modification or cancellation
- RFQ responses can be canceled while in any state
- Submitting an RFQ response places it into one of the following states:
  - An Active state
  - A Pending Approval state if the approval process has been enabled
- Seller organizations can view:
  - A list of RFQ requests
  - RFQ request details
  - A list of RFQ responses to a specific request
  - RFQ response details

### Site Administrators

- Review and manage all RFQ requests
- Manage the notification process
- ToolTech  
ToolTech is a sample e-commerce site that includes most of the common pages you would use in creating an RFQ trading environment. You can work with or modify pages from the sample site to build your own RFQ enabled site. ToolTech is packaged with WebSphere Commerce in the samples directory.
- Approval of RFQ responses  
Administrators can decide if they want responses to be subject to an approval process.
- Access control  
Database management, security and access to WebSphere Commerce activities, including RFQs, can be restricted to specific individuals and organizations. The restrictions are based on a set of policies managed by the site administrator. Examples of these activities include the registering of users before they can create requests or responses, and assigning them the proper roles. For example, specifying who can approve a response.

### Preliminary administrative tasks

The RFQ trading mechanism is inoperative unless explicitly enabled by the site administrator. Many of these tasks may have been completed by your IT staff. Descriptions are provided to give you an overview of the entire process. The organization type and the role of the user responsible for the task is shown (organization: role) in parentheses. Making RFQs functional requires several preparatory steps:

- Enabling the RFQ trading mechanism (seller: site administrator)
- Enabling RFQ notification messaging (seller: site administrator)
- Enabling WebSphere Commerce Payments (seller: site administrator)
- Deciding if response approval is to be functional (seller: site administrator)

### Enabling and disabling the RFQ trading mechanism (seller: site administrator):

Before you use the RFQ trading mechanism for the first time, you must enable it using SQL scripts that can be found in the WC directory created as part of the WebSphere Commerce installation process. For complete details, see *Enabling and Disabling the RFQ trading mechanism* in the WebSphere Commerce online help.

**Enabling and managing RFQ notification messaging (seller: site administrator):** RFQ notification messages are used to notify customers of key events that take place during RFQ negotiations. For complete details, see *Enabling RFQ notification messaging* in the WebSphere Commerce online help.

**Publishing your store (seller: site administrator):** You must publish the ToolTech sample store to permit the creation and viewing of RFQ requests and responses. For details on publishing a store, see “Part one: Publish and configure a store based on FashionFlow” on page 29 or see the WebSphere Commerce online help.

**Assigning user roles (seller: site administrator, buyer):** The site administrator is the only individual who can assign roles to a user within the seller. In general, the site administrator does all the work involved in registering sellers, within the Administration Console. For details on roles, see *Roles* and the related topics in the WebSphere Commerce online help.

**Enabling or disabling response approval (seller: site administrator):** You must sign up your organization for the relevant approver group if you want your responses to RFQ requests to be approved. If RFQ response approval is enabled, no responses will be transmitted to the buyer without being approved.

To enable RFQ response approval for your organization, do the following:

- Open the IBM WebSphere Commerce Administration Console.
- Enter the site administrator user ID and password.
- Select **Site** and click **OK**. The Site Administration Console displays.
- From the Access Management menu, select **Organizations**. A list of organizations that are members of your e-commerce store displays.
- Select **Default Organization** and click **Approvals**. The Approvals form displays.
- Select **RFQ Response Approvals** in the **Available approvals** text box and click **Add**. The selected approval process displays in the **Selected approvals** text box.
- Click **OK** to complete the process. You are returned to the Organizations page.

**If RFQs will lead to orders, enable WebSphere Commerce Payments (seller: site administrator):** WebSphere Commerce Payments handles all the background details of Internet payments on behalf of the seller and provides a graphical interface to simplify the transaction management. For details on WebSphere Commerce Payments, including *Setting up WebSphere Commerce Payment for your store.*, see the WebSphere Commerce online help.

If you intend to have the RFQ process end in an order, you must enable WebSphere Commerce Payments or a similar application.

## Creating RFQs

Your national hardware group has decided to include expansion onto the Internet as part of its strategic plan to expand its customer base. WebSphere Commerce will be the basis for this endeavor. You will be using ToolTech to create a pilot version of your online store to serve as the basis for your operational store.

### Creating a new RFQ request (buyer: buyer (buy-side))

Browse the catalog until the desired item is found.

1. Click the link to add the displayed item to a new RFQ or any existing RFQ.
2. Click the **RFQ List** link on the Main Category Display page. The RFQs page displays.
3. Click **New**. The General section displays.

**Specifying general request information:** Use the General section to provide a name and basic RFQ descriptive information.

1. Type a name for the RFQ request in the RFQ name field.
2. Type descriptive information about the RFQ in the text boxes provided.
3. Specify whether the RFQ is to result in a contract or an order. Accept the Order default for this tutorial.
4. Specify the period during which responses will be accepted. The *Start date* and *End date* limit the period during which the buyer will accept responses.

**Specifying attachments:** Use the Attachments section to specify any attachments that need to be added at the RFQ level.

1. Click **Add**. Type the attachment text into the text box that displays.
2. Click **Upload** to upload the attachment file.

**Specifying terms and conditions:** Use the Terms and Conditions section to specify special requirements or instructions.

1. Click **Add**. Type the term or condition text into the text box that displays.
  2. Indicate if a specification is required in the response.
  3. Indicate if you will accept a counteroffer from the seller by selecting the appropriate button in the *Specification can be changed* column.
- Click **Add** if you want to add this term or condition.

**Specifying products for your request:** This product section lets you select and personalize the products you want to include in your request.

*Selecting products to add to your RFQ request:* You can either:

- Click **Add products** from catalog to find the desired item by browsing through the catalog
  - Click **Add product from requisition list** to add the items in the requisition list (note that you must previously have created a requisition list to complete this step) or
  - Click **Add made-to-order product** to add made to order items, if you do not find the items you want in the catalog.
1. The Products section displays with the selected item displayed.
  2. Type in the product's Price, Quantity and Units information.
  3. Perform the following steps for each of the products you have added to add the product specifications and comments.
    - a. To add product specifications, click **Specifications** on the selected product. The RFQ product specifications page displays. Use this page to review the product's specifications and to add new specifications, if needed, to more accurately define the product you want. Specifications can also be changed or removed from this page.
    - b. Click **Add specification** if you want to add an additional specification. The New Product Specification form displays. Use this page to select the specification and specify product details.
    - c. Select a new specification from the Specification field.
    - d. Select the Operator and type in the appropriate Value and Units values.
    - e. Select the check boxes, as desired, to indicate if the specification is required in the response and if the seller can change it.
    - f. Click **Add**. The RFQ product specifications page displays with the new specification added to the list.

- g. Click **Add specification** to add additional specifications.
- h. Click **Return to Modify RFQ** to go back to the RFQ Modify page.

Comments are used to specify any special requirements you may have. For example, you can use it to specify the fact that all saws must have your company name in script.

You can also use it to request a quote for a product you cannot find in the catalog, but would like to bundle with an existing catalog product. For example, you may want to offer a set of especially hardened blades with the saw.

- a. To add comments, click **Comments** on the product you are working on to add a product comment to your request. The Comments page displays.
  - b. Click **Add comment** to add a comment to the product description. The New Comment page displays.
  - c. Select the type of information in the **Type** column.
  - d. Type in the comment.
  - e. Indicate if the specification is required in the **Specification required** column.
  - f. Indicate if the specification can be changed in the **Specification can be changed** column.
  - g. Click **Add** to add additional comments.
4. Click **Return to Modify RFQ** to go back to the RFQ Modify page.

### Submitting and viewing a new RFQ request (buyer)

Submitting a request transmits it to the seller. Do the following to submit a request:

1. On the RFQ list page, find the request you want to submit from the *RFQ name* column.
2. Click **Submit RFQ**. The RFQ list page refreshes and updates the selected requests status to *Active* or *Future* depending on what was specified on the *Start date*.

STATUS	DESCRIPTION
Active	The RFQ request has been submitted to the seller and is accepting responses.
Future	The RFQ will become active on the specified start date and will start accepting responses.

Select **RFQ Summary** on the request you have just worked on. The RFQ Summary page displays. It summarizes the RFQ's general information, attachments, product, and terms and conditions information. Details for any product can be viewed by clicking on the product name.

### Creating a new response to an RFQ request (seller)

You have received the request from the buyer for saws and are ready to create and submit a response.

**Important:** If a request characteristic such as terms and conditions, or product price has been designated as non-changeable by the buyer, you will be unable to respond to it. The Respond button will be disabled in these cases.

To create a response, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Click **Sales>RFQs**. The RFQs page displays.
3. Select the request to which you want to respond and click **Respond**. The General section displays.

**Note:** If the list is large, and you cannot easily find the request, click **Find** to use the search function.

**General response information:** In the General section, do the following:

1. Type a name for the response in the **Name** field.
2. Use the **Remark** text box to communicate any special information, such as new products of possible interest, to the buyer.
3. Select the fulfillment center.
4. Determine if all products must be accepted when the response is accepted.
5. Click **Next**. The Attachments page displays.

**Attachments information:**

1. Use the Attachments page to make your responses to the buyer's attachments.
2. If you want to add an attachment, use your browser to select one. Click **Next**. The Terms and Conditions page will display.

**Terms and conditions information:**

1. Use the Terms and Conditions page to make your responses to the buyer's terms and conditions.
2. If you are willing to accept the buyer's terms and conditions, as described, click **Next** to move on to the next step. The Products page will display.
3. To respond with a counteroffer, select the term or condition and click **Respond**. A text box displays in which you can type your response to the buyer's term or condition. Click **OK**. A refreshed Terms and Conditions page displays showing your response to the buyer's term or condition. Click **Next** to go to the Products page.

**Products:** The Products page serves as the base from which you can respond to product (or substitute product), product price, quantity and units, as well as product specifications and comments.

*Price, quantity and units information:* The values specified by the buyer are the default response values. If you are willing to accept the buyer's values, as displayed in the response portion of the list, will be used.

To respond to price, quantity or units values do the following:

1. Select the product and click **Respond**. The Respond form displays.
2. Replace the default values with counteroffers for quantity and price in the appropriate fields. Select your preferred unit of measurement from the **Units** field.
3. Click **OK**. The refreshed Products page displays your response values in the response portion of the list.

*Product specifications:* Product specifications refer to the unique properties of products that allow one product or service to be differentiated from another. For example, color and material would be suitable specifications for describing apparel products.

1. Select a product and then click **Specifications** to view the specifications describing the product. The RFQ Products Specifications Response page displays.
2. If you are willing to accept the specifications as displayed, click **OK**. The Products page displays.
3. To change any of the response values displayed in the specification list, select the product and click **Respond**. The Product Specifications form displays.

**Note:** If the Respond button remains disabled, the buyer has specified that no changes to the specification values will be accepted.

4. Select a new operator from the **Operator** field.
5. Type new values into the **Value** field.
6. Select a new unit of measurement from the **Units** field.
7. Click **OK**. A refreshed RFQ Products Specifications Response page displays your responses.
8. Click **OK** when your specification responses are completed. The Products page displays.

*Comments:* Product comments convey information that cannot be included in the existing screens. For example, when ordering shirts, the buyer may only find specifications for material, color and size in the catalog. If the buyer also wanted to specify the number of buttons, for which no specification existed, the specification would be typed in a **Comment** box.

The comment function can also be used to order a product not available in your catalog. For example, although you may not sell pants, the buyer might ask you to quote a price for matching pants for the shirts they have ordered.

1. Click **Comments** to view the buyers product comments. The Product Comments page displays. Click **OK** to accept the comments as displayed.
2. Select a Comment and click **Respond** if you want to respond to the comment. A text box displays.
3. Type your response and click **OK**. A refreshed Product Comments page displays your response.
4. Click **OK** if you have finished responding to the comments. The Products page displays.
5. Click **Finish**. A dialog box saying, The response was created successfully displays. Click **OK** in the box. The RFQs page displays.

**Note:** If you started creating the response by clicking the New button on the RFQ Responses page, you will be returned to this page rather than the RFQs page.

When making a response, you can also substitute a product. For information, see *Substituting a product in an RFQ response* in the WebSphere Commerce online help.

### **Submitting and viewing a new RFQ response (seller)**

Submitting a response transmits it to the buyer for evaluation. Do the following to submit a request:

1. On the RFQs page, select the request you want to submit from the **RFQ name** column and click **Responses**. The RFQ Responses for *response name* page displays. If you are already on the RFQ Responses page, go to Step 2.



2. Select the response you want to send to the buyer and click **Submit**. The page refreshes with the status of the response changed to Active or Pending Approval depending on whether RFQ Approval has been enabled.
3. Select the request you have just worked on and click **Summary**. The RFQ Summary page displays. It summarizes the RFQs general information, duration, attachments, product, and terms and conditions information. Details for any product can be viewed by clicking on the product name.

STATUS	DESCRIPTION
Active	1) RFQ Approval is disabled and the RFQ response has been submitted directly to the buyer for evaluation  2) RFQ Approval was enabled and the response has been approved and submitted to the buyer.
Pending Approval	RFQ Approval is enabled and the response is awaiting review by the approver. It will be submitted to the buyer if approved.

### Working with product description specifications (seller)

Over time, you may find it necessary to make changes to the product descriptions in your catalog. This will often entail the addition, deletion or modification of the specifications describing unique product attributes (specifications).

**Note:** Be careful when making any changes to the Personalized Attributes list. You may affect negotiations being carried out by other users within your organization.

To make changes to the product specification list, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Click **Sales>Personalized Attributes**. The Personalized Attributes page displays. It contains all the attributes (specifications) available for describing products.

For details on Personalized attributes, see the WebSphere Commerce online help.

### Closing an RFQ request (buyer)

Responses cannot be accepted or rejected unless an RFQ is closed.

When an RFQ is closed, no more responses will be accepted. The WebSphere Commerce Scheduler which periodically checks the RFQ end time against the current time, normally closes RFQs. When the RFQ end time is detected, the RFQ is closed.

For purposes of this tutorial, you should close the RFQ request manually using the following procedure:

- Using your browser, navigate to the ToolTech logon page at the URL you noted when you published the store. The URL format for a published store will usually resemble `https://your_hostname/webapp/wcs/stores/servlet/store_name/index.jsp` where *your\_hostname* is the name of your WebSphere Commerce server and *store\_name* is the name of your published store. We are using a store name of **ToolTech** for the tutorial.
1. Type your ToolTech user ID and password and click **Submit**. The Main Category Display page displays.

2. From the ToolTech RFQ list page, click **Close RFQ** on the selected RFQ. The RFQ list page updates, with the selected RFQ displaying a status of *Closed*.

### **Evaluating responses (buyer: buyer (buy-side))**

To review a response before accepting or rejecting it, do the following:

1. From the ToolTech home page, click **RFQ List** The RFQ list page displays.
2. Click **List RFQ Responses** on an RFQ. The RFQ Responses for *response name* page displays. The list contains all the responses received from the seller.
3. Click on the name of the selected response you want to review. The Response Summary page displays. The page summarizes General, Terms and conditions, Attachments, and Product page information.
4. Click a **product name** to view product details about terms and conditions and specifications. The Product: *product name* page displays. It contains details about the specific item (SKU) selected.
5. Click **OK** when your review is complete. The RFQ Responses for *response name* displays.

### **Selecting an RFQ winner (buyer)**

After you have evaluated the RFQ responses, a winner can be selected. If there are multiple responses, it is possible to select multiple winners. This situation may occur if different units within the seller respond to different products within the RFQ. Sellers can view the results of their responses after you have selected a winner.

To select an RFQ winner, do the following.

1. From the ToolTech home page, click **RFQ List** The RFQ list page displays.
2. Click **List RFQ Responses** on an RFQ. The RFQ Responses for *response name* page displays. The list contains all the responses received from the seller.
3. Select the response you want to accept or reject.
4. Depending on your decision, click **Accept** or **Reject**. The In evaluation Response Status is updated to Won or Lost depending on your decision.

### **Completing an RFQ request (buyer)**

In order for the RFQ to move into the contract or order process after winners are selected, the RFQ must be completed.

To complete an RFQ, do the following:

1. Navigate to the RFQ list page by clicking **RFQ List** from the ToolTech home page. The RFQ list page displays.
2. Click **Complete RFQ** on the RFQ you want to complete. The Winning Responses page displays. This page serves as the base from which shipping, billing and payment information can be provided to the seller. This information *must* be provided.

**Providing shipping, billing and payment information:** The shipping, billing, and payment information are entered in the convert RFQ response to order page of a winning response. Type the appropriate information, and click **OK**.

---

## **Adding your organization's logo**

You can add your organization's logo to the ToolTech header by replacing your logo's URL in the `businessaccount.xml` file before publishing your store.



To add your organization's logo, replace the URL with your logo's URL in the `businessaccount.xml` file:

```
<TermCondition>
<DisplayCustomizationTC sequenceNumber = "1">
<DisplayLogo>
<Attachment URL = "images/logoAccountA.gif" />
</DisplayLogo>
</DisplayCustomizationTC>
</TermCondition>
```

Where `images/logoAccountA.gif` represents where your logo's URL should be placed.



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## Part 5. Demand chain sample (Commerce Plaza)

**Business** WebSphere Commerce provides you with a sample of a demand chain business model. This part includes the following information:

- Demand chain sample information
- Commerce Plaza overview and set up information
- Commerce Plaza tutorials



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## Chapter 14. Demand chain sample store archives

There are two value chain business models: demand chain and supply chain.

The demand chain business model sample includes the Commerce Plaza site, the catalog asset store, the reseller asset store, and the distributor proxy store and distributor asset store. Commerce Plaza allows resellers to transfer shopcarts to distributors. In the process of purchasing, this site also allows resellers to request prices and availability from distributors on any products of interest.

---

### Demand chain store archives and access control

What follows is a description of the organization and roles that are created in the three stages of setting up your sample: instance creation, SAR publish, dynamic entities.

#### Organization structure and instance creation

In order to allow customers or buyers to access your site, browse your catalog, and place orders; or to allow employees to administer the site, including updating the catalog, creating new promotions, or managing orders; or to allow resellers or other business partners to complete transactions on your site, all actors in your business scenario must be assigned a position in the WebSphere Commerce organization structure.

The WebSphere Commerce organization structure provides a framework for the actors, or entities, in your business scenario. This framework is organized in a hierarchical structure, which mimics typical organizational hierarchies with entries for organizations and organizational units and users. The organizations and organizational units in the framework act as owners for the parts of your business. All parts of your business, including customers, administrators, stores, catalogs and distributors, must be owned by an organization or organizational unit.

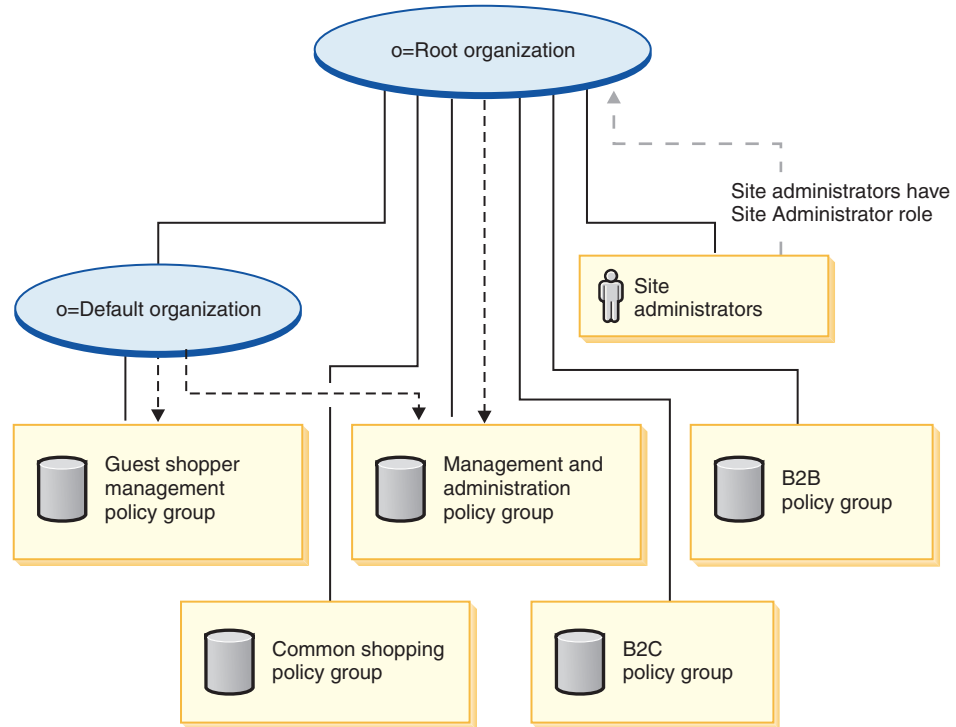
The organization structure and the access control model are closely related, in that the access control model applies access control policies to organizations rather than to different entities (stores, customers, administrators, and so on). The policies that apply to an entity (or resource) are applied to the organization that owns the entity or resource.

The following diagram outlines the basic WebSphere Commerce organization structure with access control.

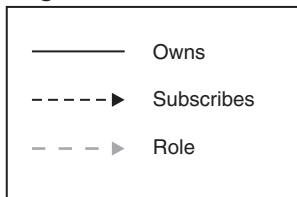
- **Root organization:** The root organization is the top level organization and is its own parent. All organizations in the WebSphere Commerce organization structure are descendents of the root organization. In this example the site administrators are owned by the root organization.
- **Default organization:** The default organization is under the root. All guest customers and all customers in consumer direct businesses belong to the default organization.
- **Child organizational entities:** One or more other levels of organizational entities can exist beneath the parent organizational entities. You can add as many child organizational entities as necessary to support your business.

The WebSphere Commerce access control structure is flexible enough to support all entities in the supported business models. During instance creation, only the root organization and default organization are created. The basic access control structure is installed during instance creation, regardless of the business model.

### Basic access control



#### Legend



The root organization owns the following default policy groups:

- Management and administration
- Common shopping
- B2C
- B2B

The default organization owns the following default policy groups:

- Guest shopper management

However, the root organization only subscribes to the management and administration policy group. The policies in this policy group apply to all of the resources owned by this root and its descendants, except for those descendants that subscribe to a policy group. Since the default organization subscribes to the policy groups, the policies from the root organization are not inherited. For the

default organization, the policies in the management and administration and guest shopper management policy groups are applied to any resources owned by the default organization.

For more detailed information on the default policy groups, see the appendix of the *IBM WebSphere Commerce Security Guide*.

## Demand chain

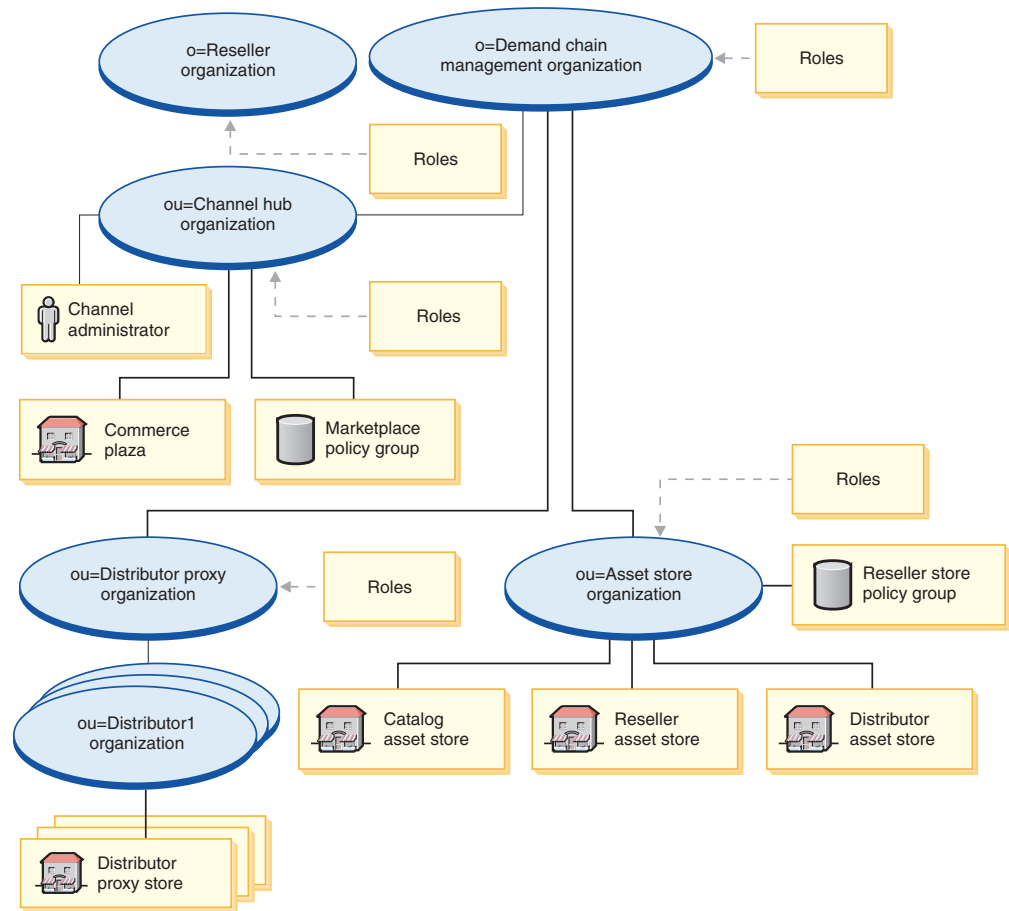
The following SAR files are associated with the demand chain business model:

*Table 12. Demand chain*

Store archive name	Description
DemandChain.sar	A sample composite store archive containing the organization structure, predefined user roles, and necessary access control policies and policy group subscriptions to create a reseller channel management environment, plus the necessary assets to create a reseller channel management solution, including a channel site, shared catalog, and reseller and distributor stores.
DemandChainOrganizationStructure.sar	A sample store archive containing the organization structure and predefined user roles to create a reseller channel management environment.
ChannelHub.sar	A sample store archive containing all the necessary assets to create a hub site.
CatalogAssetStore.sar	A sample store archive containing all the necessary assets to create a shared catalog.
ResellerStorefrontAssetStore.sar	Contains all the necessary assets to create a reseller storefront.
DistributorProxyOrganizationStructure.sar	A sample store archive containing the organization structure and predefined user roles to create top level organization structure for the distributor proxy stores.
DistributorAssetStore.sar	Contains all the necessary assets to support distributor proxy stores.

The roles on an organization indicate the possible roles that a user can play within the organization. For more information on roles, see the WebSphere Commerce online help.

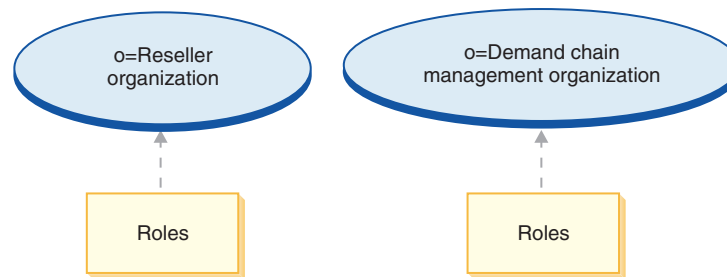
## DemandChain.sar contents



- Reseller organization and roles: Seller, Marketing Manager, Operations Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Manufacturer organization and roles: Seller, Marketing Manager, Operations Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Commerce plaza organization and roles: Seller, Marketing Manager, Operations Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Commerce Plaza
- Distributor proxy organization and roles: Channel Manager, Registered Customer
- Three distributor organizations
- Asset Store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Catalog asset store
- Distributor asset store
- Reseller asset store
- Policy group -- MarketPlace Policy Group, FashionFlow Policy Group
- Channel administrator

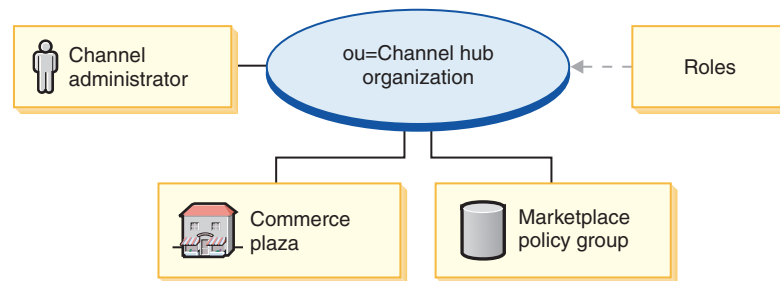


### DemandChainOrganizationStructure.sar contents



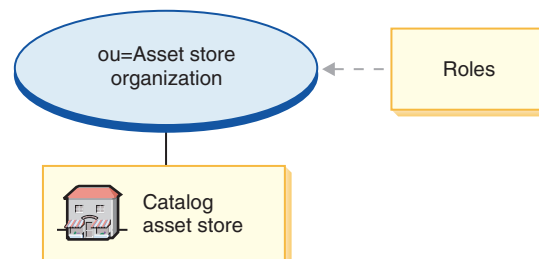
- Demand Chain organization and roles: Seller, Marketing Manager, Operations Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Manufacturer organization and roles: Seller, Marketing Manager, Operations Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer

### ChannelHub.sar contents



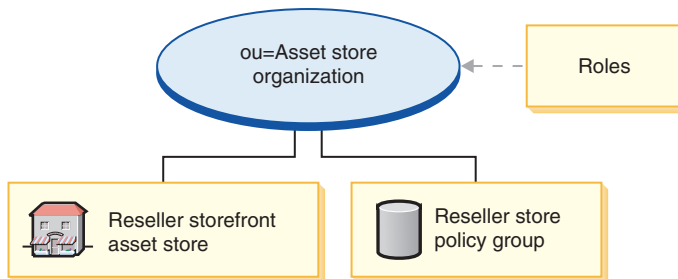
- Channel Hub organization and roles: Seller, Marketing Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Distributor Proxy organization and roles: Channel Manager, Registered Customer
- Asset Store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Commerce Plaza
- MarketPlace Policy Group
- Channel administrator

### CatalogAssetStore.sar contents



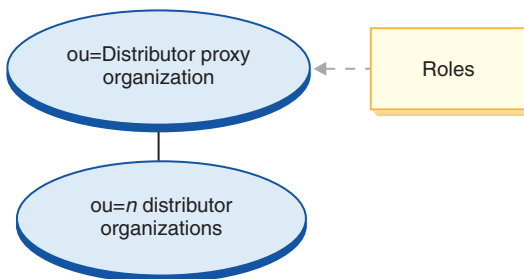
- Asset Store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Catalog asset store

### ResellerStorefrontAssetStore.sar contents



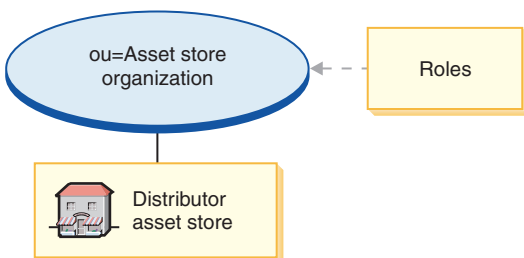
- Asset Store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Reseller asset store
- Consumer direct reseller profile policy group

### DistributorProxyOrganizationStructure.sar contents



- Distributor Proxy Organization and roles: Channel Manager, Registered Customer
- Distributor1 Organization
- Distributor2 Organization
- Distributor3 Organization

### DistributorAssetStore.sar contents

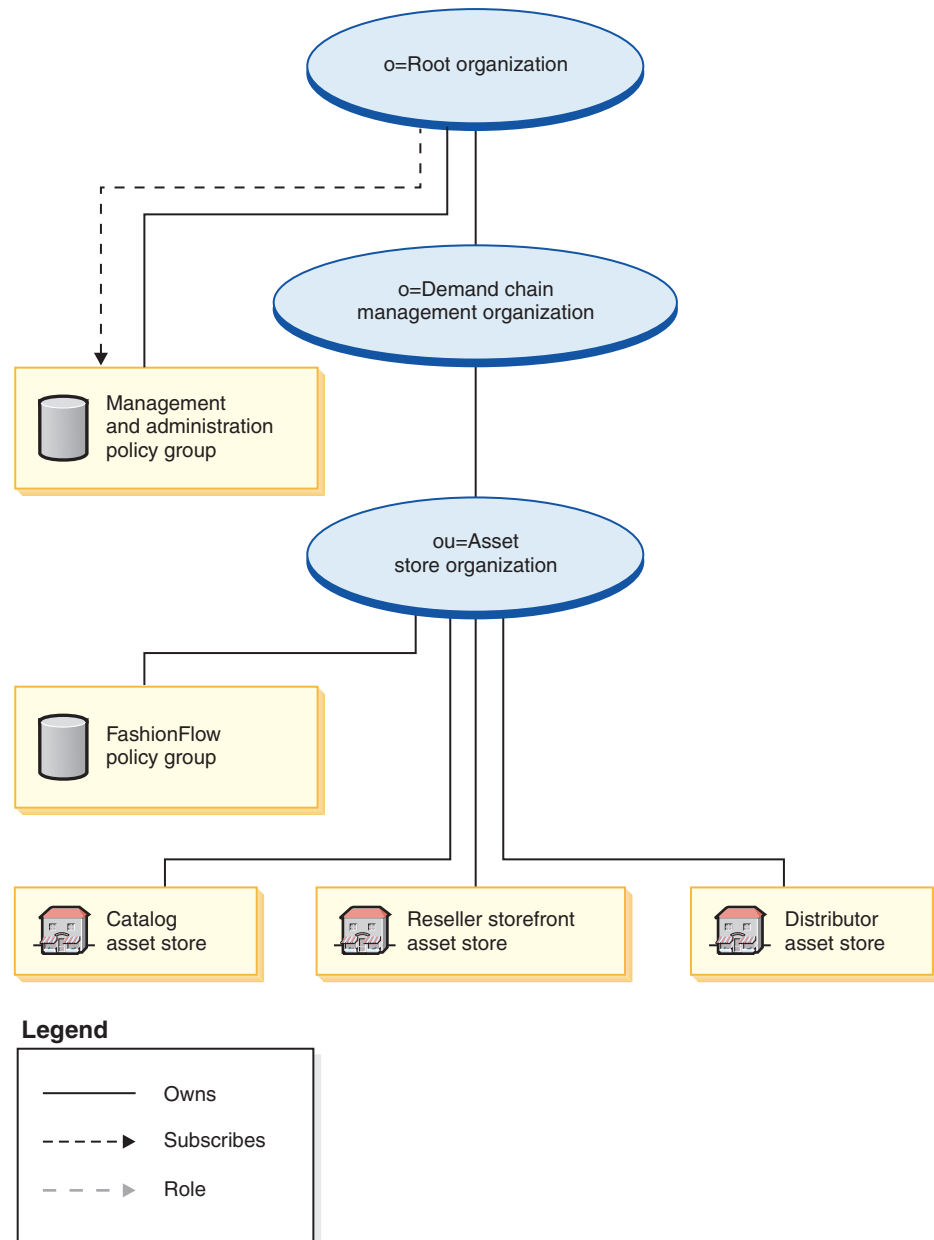


- Asset Store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Distributor asset store

## Deployment of SAR

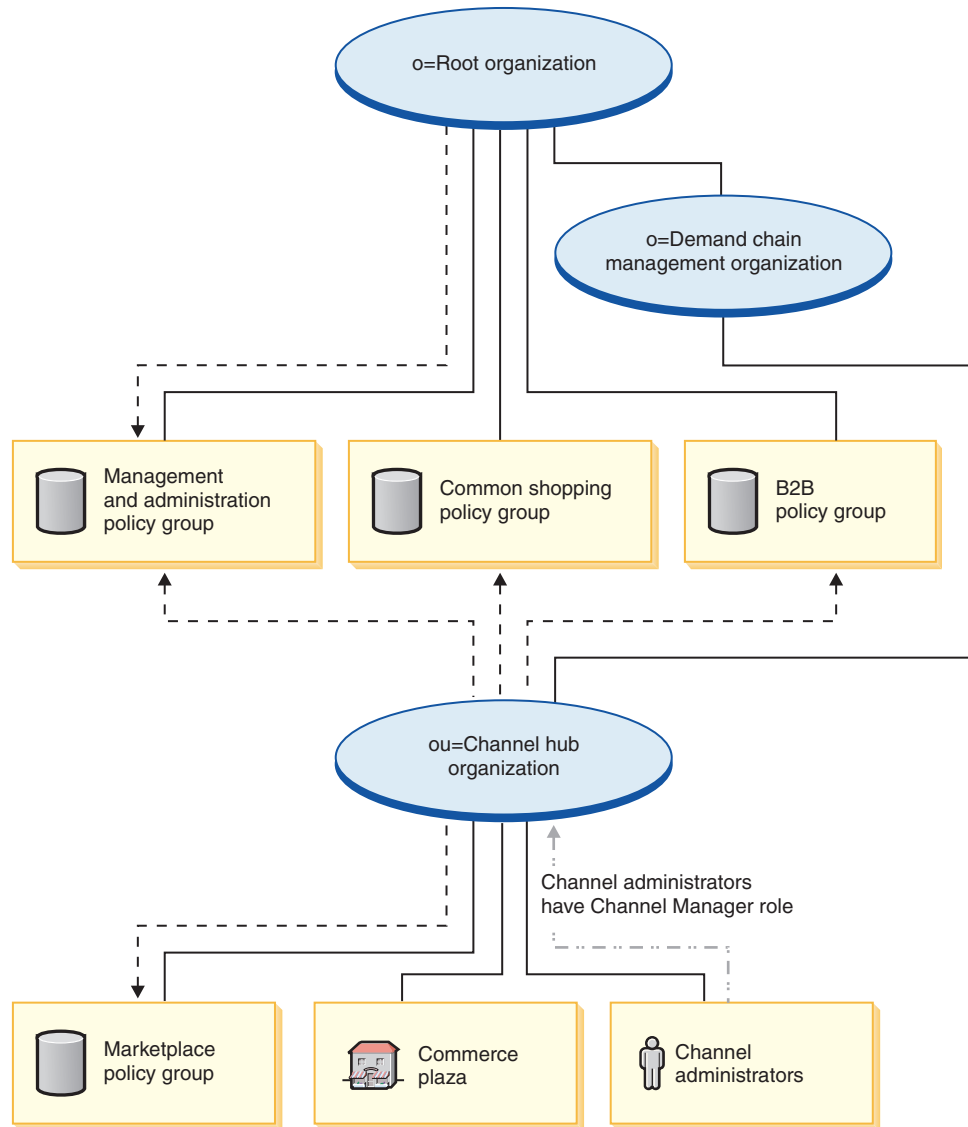
This section illustrates the deployment of DemandChain.sar into your instance. It illustrates the policy subscriptions and access control roles that are set up as part

of this deployment.

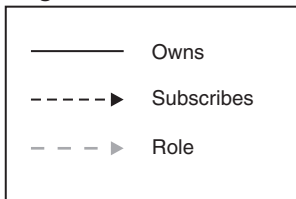


The asset store organization does not subscribe directly to any policy groups. As a result it inherits the management and administration policy group from the root organization. These policies apply to the asset store organization and the asset stores that it owns. The asset store organization owns the FashionFlow policy group, but does not subscribe to it.

**Note:** The individual reseller consumer direct organizations will subscribe to the FashionFlow policy group when the reseller store is created.



### Legend

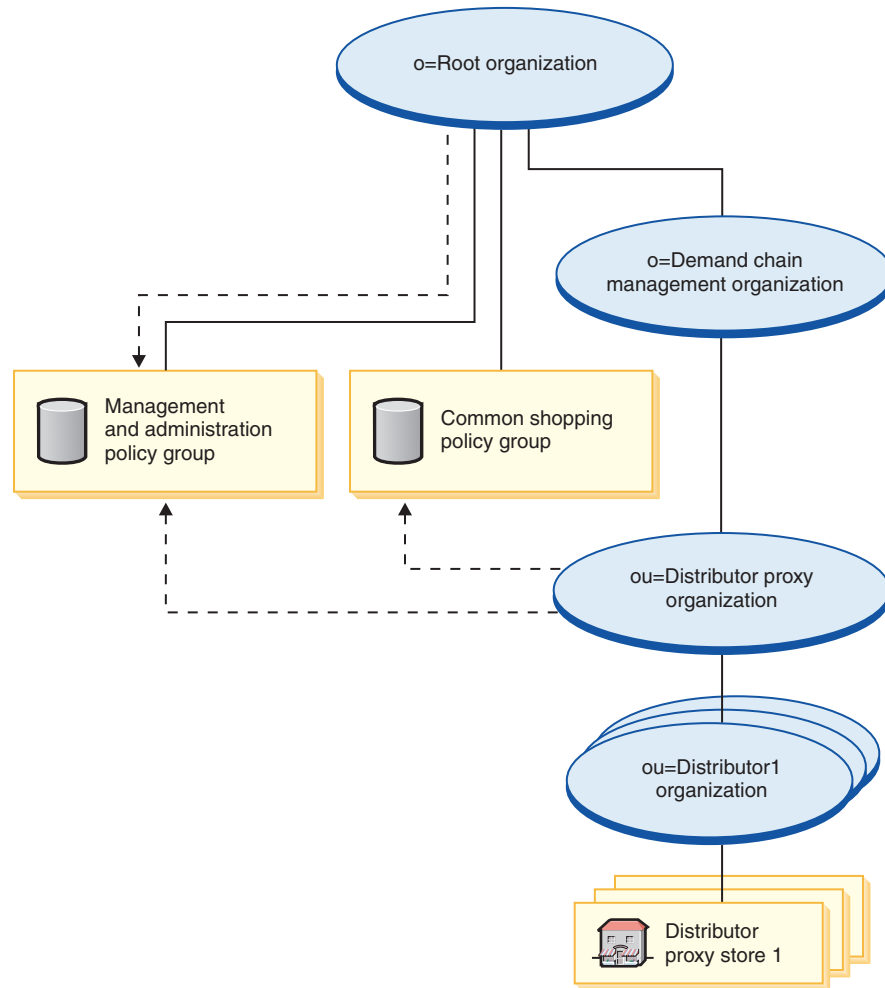


The channel hub organization subscribes directly to the Management and administration policy group, the common shopping policy group, the B2B policy group and owns and subscribes the Marketplace policy group. As a result, these policies apply to the channel administrators, who are directly under the channel hub organization, as well as to the channel hub (Commerce Plaza).

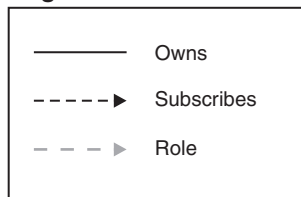
The Marketplace policy group contains the following policies:

- AllUsersExecuteMarketplaceAllUserViews

- RegisteredCustomersForOrgExecuteMarketplaceRegisteredCustomerViews
- ContractAdministratorsForChannelOrgExecuteCreateCommandsOnMemberResource
- ContractAdministratorsForChannelOrgExecuteContractDeployCommandsOnContractResource
- ContractAdministratorsForChannelOrgDisplayContractDatabaseResourceGroup

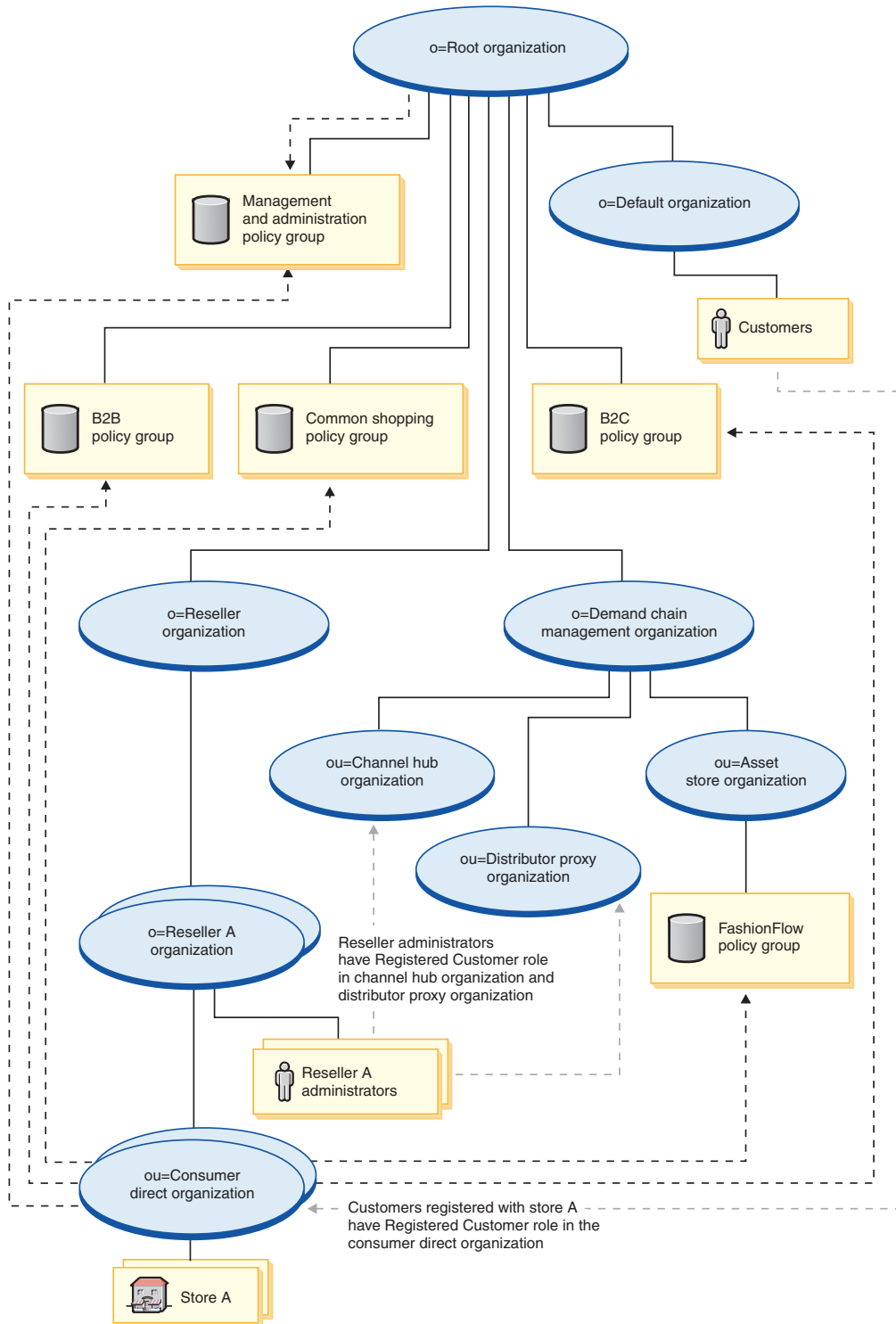


**Legend**

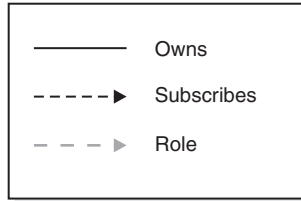


The distributor proxy organization subscribes to the management and administration policy group and the common shopping policy group. As a result, these policies apply to the distributor organizations who are directly under the

distributor proxy organization.



### Legend



The reseller organization does not subscribe directly to any policy groups. As a result it inherits the management and administration policy group from the root organization. These policies apply to the reseller organization and the reseller A organizations that it owns as well as to the reseller A administrators.

The consumer direct organization subscribes directly to the management and administration policy group, common shopping policy group, B2C and B2B policy groups, as well as to the FashionFlow policy group. These policies apply to all stores owned by the consumer direct organization.

## Dynamically created roles

Customers are given the *registered customer* role in the organization that owns the hosted store to which they are registering (for example, ou=B2C Organization).

When you register a new reseller, the following roles get assigned:

- The new reseller organization gets the roles: Seller, Seller Administrator, and Registered Customer
- The administrator created for the new reseller organization is granted the role of Registered Customer, Seller, and Seller Administrator in the new reseller organization, and Registered Customer in the Reseller Hub organizational unit and in the Distributor Proxy Organization.

This information is picked up from the MemberRegistrationAttributes.xml file. For more information, see “Roles and the MemberRegistrationAttributes XML file” on page 40 for the WebSphere Commerce online help.





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## Chapter 15. Demand Chain sample store (Commerce Plaza) overview

There are two value chain business models: demand chain and supply chain. The Commerce Plaza sample is part of the demand chain.

### Demand Chain

The demand chain business model sample includes the Commerce Plaza site, the catalog asset store, the reseller asset store, and the distributor proxy stores. Commerce Plaza allows resellers to purchase products directly from their distributors by transferring their shopcars to the distributor site. In the process of purchasing, this site also allows resellers to request prices and availability quotations from distributors on any products of interest. Features include:

- Navigate the manufacturer or distributor catalog.
- Get real-time price and availability information from remote distributors.
- Select a subset of distributors for the purpose of quotation and shopping cart transfer.
- Create a favorites list and add items to that list.
- Place an order (place items in shopping cart, request price and availability, assign orders to distributors, transfer carts to distributor sites, and checking out on distributor sites).
- Save a cart (place items in shopping cart, request price and availability and save it).
- Directly link to the distributor sites to complete the order process.
- Place an order from a saved cart (open a saved cart, request price and availability, assign orders to distributors, transfer carts to distributor site, and check out on distributor site)
- Review order status of fully transferred order

Commerce Plaza also provides self-provisioning tools for resellers:

- Register a new reseller organization
- Edit account information
- Create a store with Store Creation Wizard
- Hosted store management
- Organization administration

Commerce Plaza provides all the pages and features necessary for a functioning demand chain online store. Commerce Plaza is packaged with WebSphere Commerce as a store archive (as the composite: DemandChain.sar). Publishing a store archive to a WebSphere Commerce Server allows you to create a running store.

In WebSphere Commerce, Business Edition, sample store archive files are also used to package and deliver organization structures, predefined user roles, and access control policies necessary to create the environment for your store or site, as well as collections of store assets that create a catalog or a storefront. In order to create a running store, you must publish one of the composite store archives. You can also publish a sequence of component store archives to publish a running store.

Stores are published from the Administration Console; only Site Administrators can publish a store archive by selecting Site, and from the Store Archives menu, selecting Publish. The Store Archives page then displays listing the store archives available for publish. By default, the page showing composite store archives displays. For more information on publishing a store archive, see the WebSphere Commerce online help publishing information.

Since store creation in WebSphere Commerce is based upon selecting a sample store archive and modifying it, Commerce Plaza is designed to act as the basis for your store. It is based on a typical shopping flow. The sample store pages can be customized. All Commerce Plaza sample store pages are JavaServer Pages. These pages include HTML, Java, and JavaScript. The JSP files can be cached.

---

## Chapter 16. Creating a store based on Commerce Plaza

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### Part one: Publish and configure a store based on Commerce Plaza

To create a store using the Commerce Plaza sample store, you must publish it, and then, optionally, you may configure it. For information on how to publish and configure a sample, see “Part one: Publish and configure a store based on FashionFlow” on page 29, *Publishing a store using the Administration Console* and *Configuring a store using the WebSphere Commerce Accelerator*, substituting Commerce Plaza for FashionFlow, when necessary.

---

### Part two: Importing distributor service agreements

Importing a reseller service agreement uploads a distributor service agreement in XML format from your local client to the WebSphere Commerce Server and deploys the service agreement in WebSphere Commerce. If these are not imported successfully, the store will not function correctly.

To import a distributor service agreement, do the following:

1. If you have WebSphere Commerce installed on your machine, or on a client machine on the same network as the WebSphere Commerce machine, access the following Web address in your browser:

`https://hostname:8000/accelerator`

where *hostname* is the fully qualified HTTP host name of your WebSphere Commerce Server.

2. Open the WebSphere Commerce Accelerator as follows:
  - a. From the Logon page, type your WebSphere Commerce Accelerator logon user name and password.
  - b. From the **Name** drop-down list on the Select Store Information page, select the Commerce Plaza.
  - c. From the **Language** drop-down list, select the language in which you want to administer the store.
  - d. If you are assigned a role with fulfillment duties, from the **Fulfillment center** drop-down list, select the name of the fulfillment center associated with the store.
  - e. Click **OK**. The WebSphere Commerce Accelerator home page displays. Depending on your user role, one or more menus display.
3. From the **Channel** menu, click **Distributors**. The Distributors page displays.
4. Click **New**. The Import page displays.
5. Click **Browse** and navigate to the following directory:  
`wc_installdir/samplestores/DistributorContracts`.
6. Click **Import** to import the following distributor service agreements. Please repeat these steps until the following three XML files have been imported:
  - Distributor1.xml
  - Distributor2.xml
  - Distributor3.xml
7. You also need to import Distributor1\_en\_US.xml (or the language of your choice). When you import the language-specific xmls, no new service

agreements will be created. Please repeat these steps until an XML file has been imported for each of the three distributors.

**Note:** When the XML file uploads successfully, a distributor relationship will be created that respects the terms and conditions defined in the distributor service agreement. In addition, a confirmation message will be displayed once the setup process is complete and the list of distributors will be refreshed showing the newly created distributor. The status of the newly created distributor should be Active. If the status of the distributor service agreement is *Deployment Failed* when the list of distributors is refreshed, you can attempt to redeploy the distributor service agreement.

8. Click **Logout**, to log off of the WebSphere Commerce Accelerator.

---

## Part three: Creating scheduled jobs for a sample store

After publishing a sample store, scheduled jobs needs to be created for the store in the WebSphere Commerce Accelerator. For details on how to create scheduled jobs for a sample store, see “Part one: Publish and configure a store based on FashionFlow” on page 29.

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## Part four: Configuring e-mail for your site

In order to send e-mail notifications from your store (for example, sending e-mails notifying users that their registration has been approved or not), or to receive e-mails through your store, such as through the feedback page, you must do the following:

1. Open the Administration Console by doing the following:
  - a. Access the following URL in your browser:  
`https://hostname:8002/adminconsole`  
  
where *hostname* is the fully qualified TCP/IP name of your WebSphere Commerce server.
  - b. Log on to the Administration Console.
  - c. From the Administration Console Site/Store selection page, select the site radio buttons and click **OK**. The Site Administration Console home page displays.
2. From the **Configuration** menu, select **Transports**. The Transport Configuration page displays.
3. Select the check box beside **E-mail**. Click **Configure**. The Transport Configuration Parameters dialog opens.
4. In the **Host** field, type the fully qualified name of your e-mail server.
5. In the **Protocol** field, type the name of the protocol. The default is SMTP. Click **OK**.
6. From the **Configuration** menu, select **Message Types**. The Message Type Configuration page displays.
7. Click **New**. The Message Transport Assignment page displays.
8. From the **Message type** drop-down list, select **Notification of approved reseller registration**.
9. In the **Message severity** field, type 0 to 0.
10. From the **Transport** drop-down, select **E-mail**.
11. From the **Device format** drop-down, select **Standard device format**.

12. Click **Next**. The Message Transport Assignment page displays.
13. Enter appropriate text in the following fields: Recipient, CC, BCC, Sender and Subject. Click **Finish**.
14. Repeat steps 7 through 13 for the following message types: *Notification of rejected reseller registration* and *Message submitted by customer*.
15. Click **Logout**, to log off of the WebSphere Commerce Accelerator.

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## Part five: Setting up WebSphere Commerce Payments for your store

**Note:** WebSphere Commerce Payments is not used for Commerce Plaza, but is used for the hosted stores.

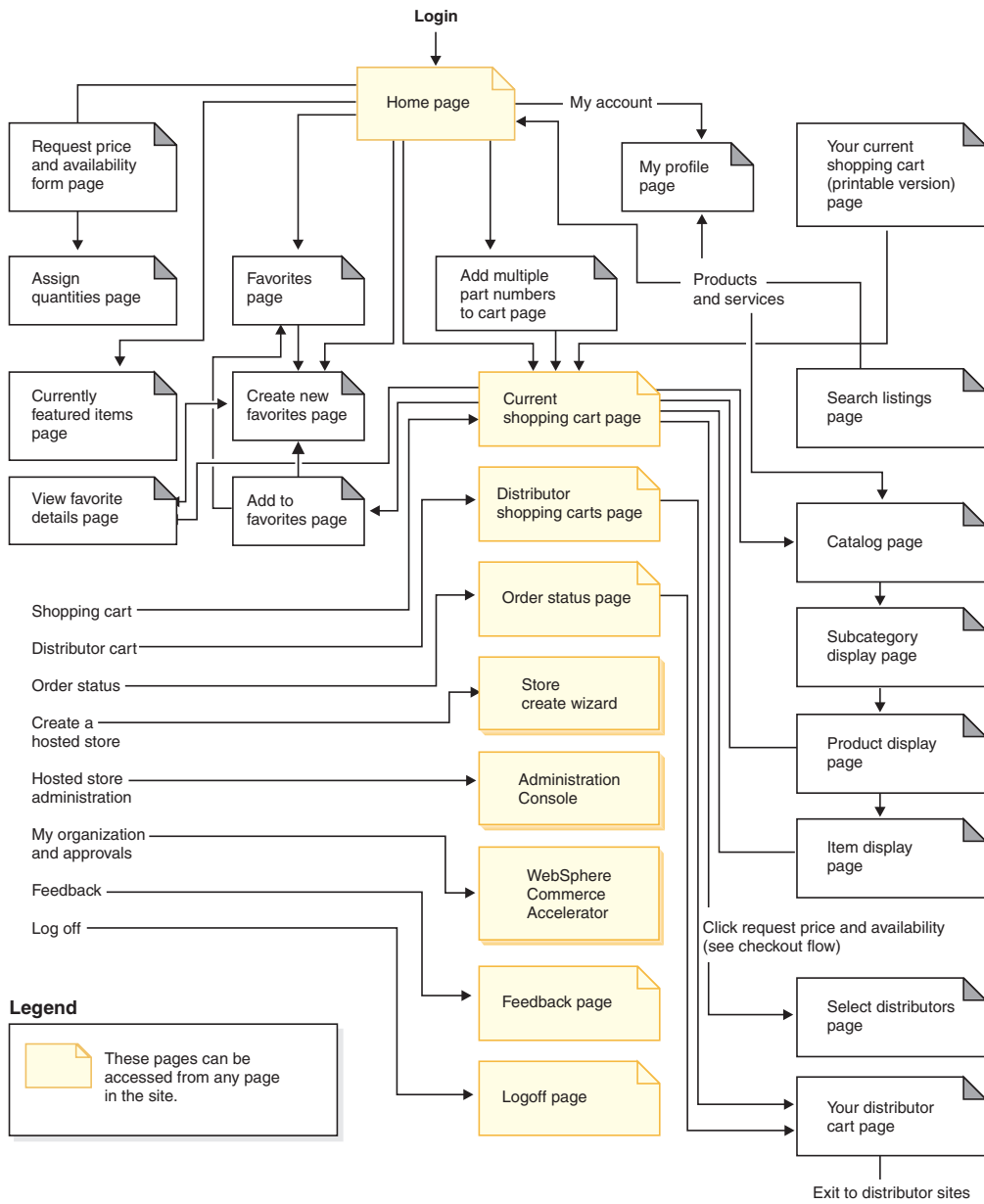
For information on setting up WebSphere Commerce Payments, refer to the WebSphere Commerce online help, or see “Part one: Publish and configure a store based on FashionFlow” on page 29.

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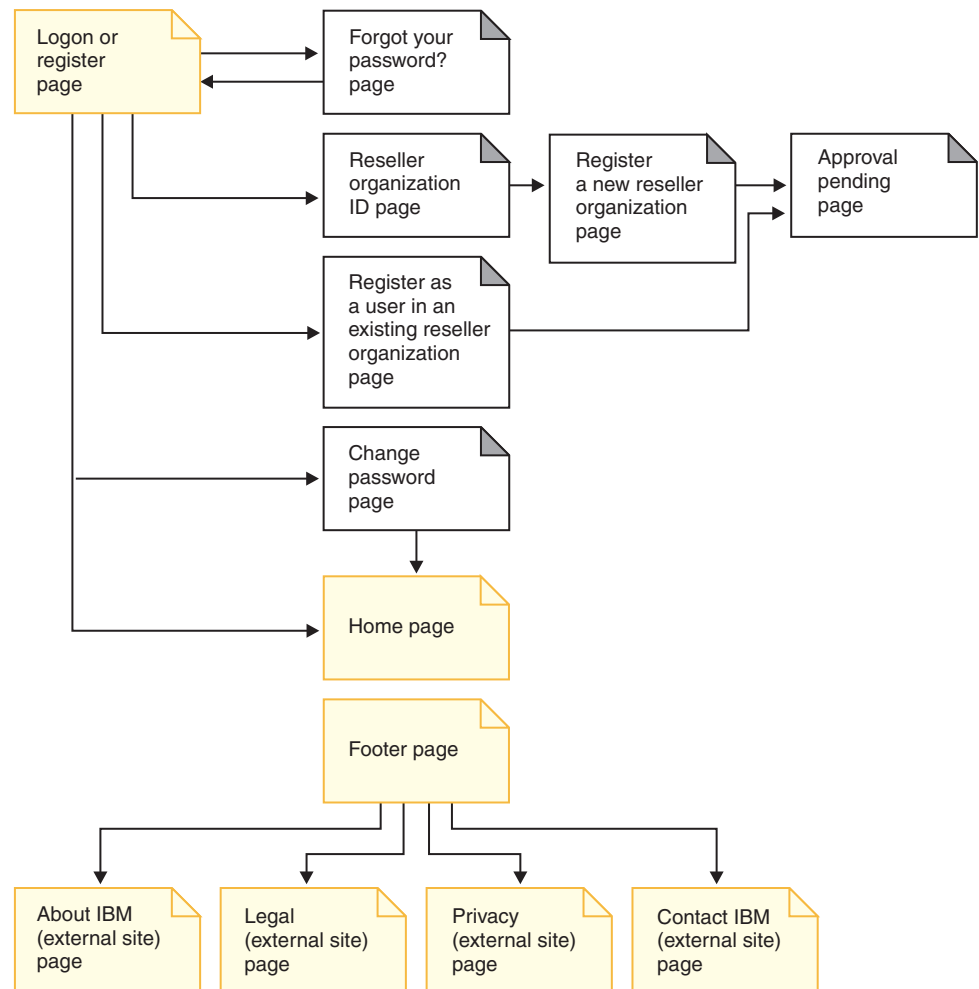
### Commerce Plaza store flows

The following diagrams show the Commerce Plaza store and catalog flow, logon flow, and checkout flow.

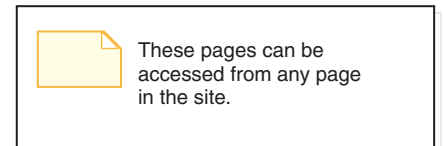
## Commerce Plaza store and catalog flow



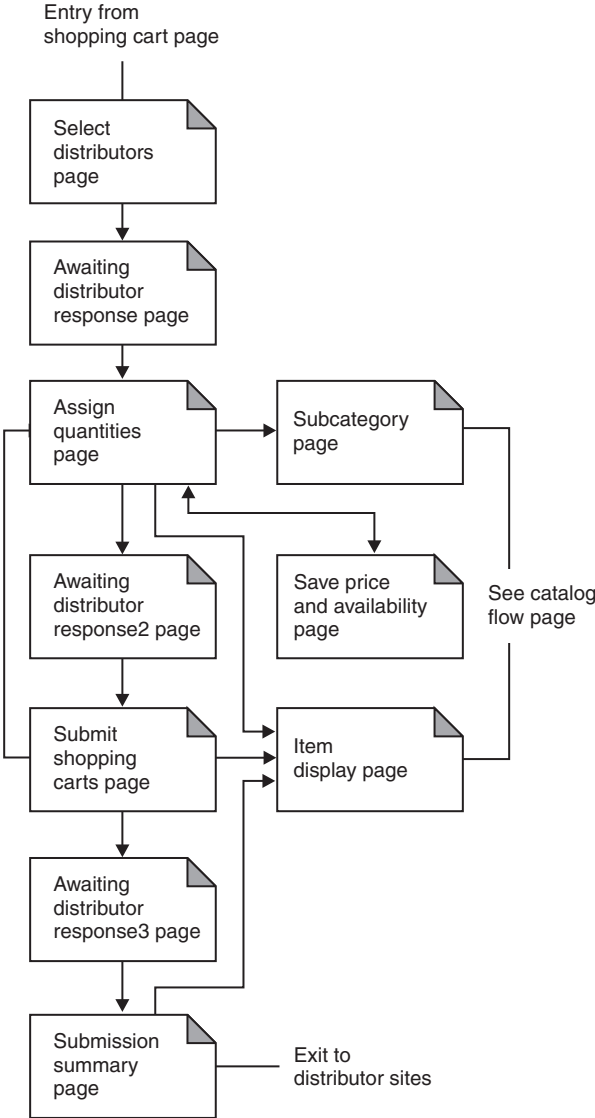
## Commerce Plaza logon flow



### Legend



Commerce Plaza checkout flow





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## Chapter 17. Commerce Plaza tutorials

**Note:** The FashionFlow tutorials apply to hosted stores (stores created using the Store Creation Wizard) except for the following:

- Guided Sell
- Creating and receiving e-mail options
- Using Product Exploration and Product Comparison

For those tutorials, see Chapter 7, “FashionFlow tutorials,” on page 79

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### Self-registering in the Commerce Plaza

#### Demonstrates

- Self-registering an organization.
- Self-registering a reseller.

#### Prerequisite

You must create Commerce Plaza. For more information, see Chapter 16, “Creating a store based on Commerce Plaza,” on page 165

#### Self-registering an organization and an organization administrator in the Commerce Plaza

1. The Organization Administrator goes to the Commerce Plaza home page: <http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
2. Click **A. Register a new reseller organization**. The Reseller Organization ID page displays.
3. Click **Continue**. The Register a new reseller organization page displays.
4. Fill in the required fields on the form, including usernames and passwords for the distributors.

**Note:** Note your username and password. The username and password for the distributor can be the same as the user that you are registering, for example, if you are registering as testuser, with a password of testuser1, then you can use testuser and testuser1 for the distributor passwords.

5. Click **Submit**. The Approval Pending page displays.

#### Approving an organization

1. Open the Organization Administration Console.
2. Logon as the Site Administrator.
3. Select **Approvals > Approval Requests**.
4. Click the checkbox beside the request placed by the Site Administrator. If there are many requests, click **Find** to use the Find Approval Requests page if you prefer.
5. Click **Approve**.
6. Type remarks if desired and click **OK**.
7. Logoff from the Organization Administration Console.

## Receiving approval notification and logging onto Commerce Plaza

1. The Organization Administrator logs on to the e-mail account that was specified during self-registration.
2. He receives approval notification from the Site Administrator.
3. Go to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
4. Logon as the Site Administrator (the userid created during the self-registration).

## Self-registering a reseller user as part of an existing organization

1. The reseller user goes to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
2. Click **B. Register as a user in an existing reseller organization**.
3. Click **Continue**. The Register as a user in an existing organization page displays.
4. Fill in required fields on the form, including usernames and passwords for the distributors. You need to know the name of the existing organization. Ensure that you record the username and password.
5. Click **Submit**. The Approval pending page displays.

## Approving a reseller user

1. Go to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
2. Logon as the Organization Administrator.
3. Click **My organization and approvals**.
4. Select **Approvals > Approval Requests**.
5. Click the checkbox beside the request placed by the reseller user. If there are many requests, click **Find** to use the Find Approval Requests page if you prefer.
6. Click **Approve**.
7. Enter remarks if desired and click **OK**.
8. Click **OK**.

## Receiving approval notification and logging onto Commerce Plaza

1. The reseller user logs in to the e-mail account that was specified during self-registration.
2. He receives approval notification from the Organization Administrator.
3. Go to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
4. Logon as the Reseller User.

---

## Shopping on Commerce Plaza

### Demonstrates

This tutorial will demonstrate to a reseller user:

- Basic shopping flow of Commerce Plaza.
- Requesting a quote.
- Transferring a shopcart to a distributor.

- Using quick links.
- Creating a favorites list.
- Adding multiple part numbers to your shopping cart.

## Prerequisite

You need a registered organization and a reseller user.

If you do not have a live distributor's site that you can connect to for your testing, you will need a distributor simulator to request a quote, and to submit a shopcart. When you request a quote, you are taken to a live distributor site and get a real-time quote from the distributor. You need something to simulate that process, otherwise, that request can't go anywhere.

## Shopping on Commerce Plaza, requesting a quote and transferring a shopcart (Basic Flow)

1. Go to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
2. Logon as reseller user.
3. Click **Products and services**.
4. Browse the catalog and select an item to **Add to cart**.
5. If desired, change item quantity and click **Update**.
6. Click **Request price and availability**. The Select distributors page displays.
7. Choose the distributors that you would like quotes from and click **Continue**. The Assign quantities page displays.
8. Assign the quantities to purchase (in the Quantity assigned textbox). If you would like to save this information to a shopping cart, select **Save price and availability**. The Save price and availability page displays, where you can type a description for your saved cart. Click **save**. You return to the Assign quantities page.
9. Click **Prepare to submit carts**. The Submit shopping carts page displays.
10. If you would like to go back to the previous step, and reassign quantities, click **Reassign quantities**. If some time has passed, and you would like to see if the quotes have changed, click **Refresh price and availability**, and you will return to the Select distributors page, where you can get more recent quotes.
11. Once you are satisfied, fill in a description for the shopping cart and click **Submit all shopping carts to distributors**.
12. In a new browser window, your shopping cart will be submitted to the selected distributors so you can complete your order with them.
13. In the existing browser window, the Submission summary page displays, containing the details of the shopping carts you submitted to distributors.

## Quick links options

If you find that there are some products that you purchase on a regular basis, and you know the part number, you may just want to get a quick quote, or add it to your cart directly. Do the following:

- To request price and availability, from the home page, type a quantity and IBM part number in the request price and availability field. Click **Go**. The Assign quantities page displays. From this point, you can prepare to submit your cart.

- To add directly to cart, from the home page, type an IBM part number, and click **Go**. The Current shopping cart displays with your new item. You can add more by changing the quantity, and clicking **Update**. From here, you can request the price and availability.

## Creating a favorites list

If you find that there are some products that you purchase on a regular basis, you may want to add them to a favorites list. Do the following:

1. From the home page, click **Create a new favorites list**. The Create new favorites page displays.
2. Type a name, add the part numbers and quantity of your favorites. Click **Save**. The favorites page displays. You can add more products to this list, or choose to add your list to your shopping cart by selecting **Add list to cart**. If you select **Add list to cart**, the Current shopping cart page displays with the products and quantities selected in your favorites list. You can now continue shopping, or continue with the checkout flow. To return to an existing favorites list, go to the home page and click **View my favorites lists**.

## Adding multiple part numbers to your shopping cart

If you find that there are some products that you purchase on a regular basis, and you know the part numbers, you may want to add them directly to your cart. Do the following:

1. From the home page, click **Add multiple part number to cart**. The Add multiple part numbers to cart page displays.
2. Type a name, add the part numbers and quantity of your favorites. Click **Add to shopping cart**. The Current shopping cart page displays. You can now continue shopping, or continue with the checkout flow.

---

## Creating a hosted store

### Demonstrates

- Creating a hosted store.

### Prerequisite

The person creating the store must have the role of Site Administrator.

## Creating a hosted store

**Note:** *This note is for the value chain hosted stores created with the Store Creation Wizard only. When a seller creates a hosted store, this is not a regular store publish, and additional store language data assets beyond the store default language are not carried over into the hosted store. So, if a seller adds a supported language to a store, the store assets for that language are not available. If a supported language is going to be added to a hosted store, ensure that the translated assets (store data, and properties files) are available to the store or the store pages will not function correctly.*

1. Go to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>
2. Logon as the Organization Administrator
3. Click **Create a Hosted Store**
4. Select Language and click **OK**. The Store Creation Wizard displays.

5. Fill in all of the fields on the General page. For Store Unique Identifier and Store Display Name, use the name of your store. Click **Next**. the Store Type page
6. Select **Consumer Direct Reseller Profile** and click **Next**. The Catalog page displays.  
To create an empty catalog, select Empty catalog, and click **Next**.  
To create a shared catalog, select Commerce Plaza Catalog and click **Next**. The Fulfillment page displays.
7. Fill in a name for your fulfillment center and click **Add**. Click **Next**. The Payments page displays.
8. Select billing options and click **Next**. The Summary page displays.
9. Review the Store Creation Summary and click **Finish**.
10. When store creation has completed, click **Bookmark Store**.
11. Click **Launch Store**. When you launch the store, you are logged in as the organization administrator that created the store. If you launch from here and change the user, you will also change the user in the Commerce Plaza.

**Note:** the store is in closed state by default, so not all functionality (such as registering a user) will work. You must open the store first to get full functionality. See the tutorial called *Opening a new hosted store* for details.

---

## Modifying a hosted store

### Demonstrates

- Changing store information
- Changing the store logo
- Changing the store pages
- Changing the store flow

### Prerequisite

Before starting this tutorial, there needs to be a reseller that has created a hosted store on the site and you need the role of organization administrator.

### Changing hosted store information

To change hosted store information, an existing seller can do the following:

1. Go to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
2. Click **logon** and logon as the Organization Administrator.
3. Click **hosted store administration**.
4. Select the store, language, and fulfillment center. Click **OK**
5. Click **Store > Change Profile**.
6. Modify the store name, description and contact information.
7. Add a new currency and a new supported language.
8. Verify the changes on the hosted store front page and contact us page.

**Note:** When adding new currencies, there must be prices defined in the catalog for the new currency or a conversion rate must be defined. When adding new

languages, the store's information must be defined in the new language (that is, store profile information, catalog description, shipping mode description, and so on).

## Changing a hosted store's logo

To change a hosted store's logo, an existing seller can do the following:

1. Go to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
2. Click **logon** and logon as the Organization Administrator.
3. Click **hosted store administration**.
4. Select the store, language, and fulfillment center. Click **OK**.
5. Click **Store > Upload Logo**.
6. Click **Browse**. Select an image file from your machine. Click **OK**.
7. Click **Upload and Apply**.
8. Click **View Store** to see the changes in the storefront.

## Changing the hosted store pages

1. Go to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
2. Click **logon** and logon as the Organization Administrator.
3. Click **hosted store administration**.
4. Select the store, language, and fulfillment center. Click **OK**.
5. Click **Store > Change Pages**.
6. Select the **Home** section.
7. Add some text (such as *Welcome to Store name*). Click **OK**.
8. Click **View Location** to see the changes in the storefront. This will load the FashionFlow page for previewing the text, not the actual hosted store page. If you want to see the real hosted store, you should launch it from your bookmark.

## Changing the store style

1. Go to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
2. Click **logon** and logon as the Organization Administrator.
3. Click **hosted store administration**.
4. Select the store, language, and fulfillment center. Click **OK**.
5. Click **Store > Change Style**.
6. Modify style, colors, or banner. If you want to use your own banner, you must upload this image. For everything that you modify that you want to keep, you must click apply at each stage.
7. Click **View Store** to see the changes in the storefront.

## Changing the hosted store flow

To change the hosted store flow, an existing seller can do the following:

1. Go to the CommercePlaza home page:  
<http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp>.
2. Click **logon** and logon as the Organization Administrator.
3. Click **hosted store administration**.

4. Select the store, language, and fulfillment center. Click **OK**.
5. Click **Store > Change Flow**. For more information on changing a store flow, see “Configuring a store using the WebSphere Commerce Accelerator” on page 32.
6. Go to the Order Status panel and uncheck Track order status. Click **OK**.
7. Launch the storefront, go to My Account link and see that Order Status has been removed.

---

## Opening a new hosted store

### Demonstrates

This tutorial illustrates the following features of Commerce Plaza:

- Opening a store for business.

### Prerequisite

Before starting this tutorial, there needs to be a reseller that has created a hosted store.

### Opening the store

To open a store for business, an Organization Administrator can do the following:

1. Go to the CommercePlaza home page:  
`http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp`.
2. Click **logon** and logon as the Organization Administrator.
3. Click **hosted store administration**.
4. Select the store, language, and fulfillment center. Click **OK**.
5. Click **Store > Open/Close**.
6. Click **Open Store**.

---

## Transferring a shopcart from the hosted store to the Commerce Plaza

### Demonstrates

This tutorial demonstrates how to transfer a shopping cart from the hosted store to the Commerce Plaza.

### Prerequisite

This step requires that an order has been placed in the hosted store, and a simulated distributor. If you do not have a live distributor’s site that you can connect to for your testing, you will need a distributor simulator to request a quote, and to submit a shopcart. When you request a quote, you are taken to a live distributor site and get a real-time quote from the distributor. You need something to simulate that process, otherwise, that request can’t go anywhere. You will be able to transfer your shopcart, but nothing will happen afterwards without a distributor or a simulated distributor.

If your hosted store needs to use a shared fulfillment center, you must edit the following file: `wc_installdir/xml/trading/xml/TemplateHostingContractRPS.xml`. You need to replace `SERVICE_PROVIDER_SHARED_FULFILLMENT_CENTER_NAME` with `PCD Home` (the name of the shared fulfillment center of the service provider), copy it, and then paste this section down into the `ShippingArrangements` area specified further down in the file.



## Transferring the shopcart from the hosted store to Commerce Plaza

1. Go to the CommercePlaza home page:  
`http://host/webapp/wcs/stores/servlet/CommercePlaza/index.jsp`.
2. Click **logon** and logon as the Organization Administrator.
3. Click **hosted store administration**.
4. Select the store, language, and fulfillment center. Click **OK**.
5. Select **Operations > Approve Payment**. The Approve page displays.
6. Select the checkbox on orders you would like to approve and click on **Approve Selected**. If you have many to approve, and want to approve them all, click **Approve All**.
7. Select **Operations > Process Orders** If there are no orders here, wait a few moments and try again. You have to wait for the scheduled job to run.
8. Select the checkbox on orders you would like to release.
9. Ensure that the *Release to* field is set to *CommercePlaza fulfillment center*
10. Click **Release**.
11. Select the shopping cart option and click **OK**.
12. Click **OK** on the dialog.
13. Click **Shopping Cart**.
14. Click **Pending**.
15. Select the cart that was created in the previous steps.
16. Click **Make this current cart**. the Activate shopping cart page displays if your current cart is unsaved. Click *replace current cart*, since you have decided not to save your current cart. The Current shopping cart page displays.
17. Click **Request price and availability**.
18. Choose the distributors that you would like quotes from and click **Continue**.
19. Assign the quantities to purchase and click **Prepare to submit carts**.
20. Click **Submit all shopping carts to distributors**.

---

### Subcategory page troubleshooting

When you create a product in FashionFlow, ToolTech, Commerce Plaza, or Supplier Marketplace, you must specify a short description for it. When the subcategory page lists the product, the JSP file takes the short description from the database. If the short description is not specified, the subcategory page will not see the description of the product in the list.



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## Part 6. Supply chain sample (Commerce Supplier Hub)

**Business** WebSphere Commerce provides you with a sample of a supply chain business model. This part includes the following information:

- Supply chain sample information
- Commerce Supplier Hub overview and set up information
- Commerce Supplier Hub tutorials



---

## Chapter 18. Supply chain sample store archives

The supply chain business model sample includes the Commerce Supplier Hub site, a shared master catalog, and the assets required to create a hosted supplier store. It extends ToolTech to support multiple suppliers and multiple buyers.

---

### Supply chain store archives and access control

What follows is a description of the organization and roles that are created in the three stages of setting up your sample: instance creation, SAR publish, dynamic entities.

#### Organization structure and instance creation

In order to allow customers or buyers to access your site, browse your catalog, and place orders; or to allow employees to administer the site, including updating the catalog, creating new promotions, or managing orders; or to allow resellers or other business partners to complete transactions on your site, all actors in your business scenario must be assigned a position in the WebSphere Commerce organization structure.

The WebSphere Commerce organization structure provides a framework for the actors, or entities, in your business scenario. This framework is organized in a hierarchical structure, which mimics typical organizational hierarchies with entries for organizations and organizational units and users. The organizations and organizational units in the framework act as owners for the parts of your business. All parts of your business, including customers, administrators, stores, catalogs and distributors, must be owned by an organization or organizational unit.

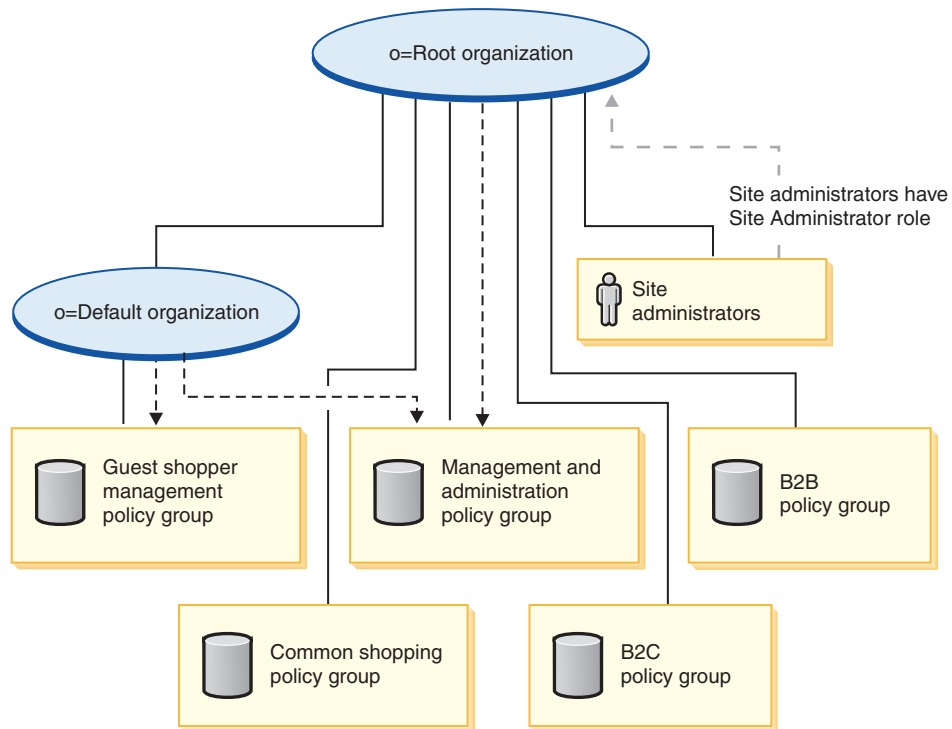
The organization structure and the access control model are closely related, in that the access control model applies access control policies to organizations rather than to different entities (stores, customers, administrators, and so on). The policies that apply to an entity (or resource) are applied to the organization that owns the entity or resource.

The following diagram outlines the basic WebSphere Commerce organization structure with access control.

- **Root organization:** The root organization is the top level organization and is its own parent. All organizations in the WebSphere Commerce organization structure are descendents of the root organization. In this example the site administrators are owned by the root organization.
- **Default organization:** The default organization is under the root. All guest customers and all customers in consumer direct businesses belong to the default organization.
- **Child organizational entities:** One or more other levels of organizational entities can exist beneath the parent organizational entities. You can add as many child organizational entities as necessary to support your business.

The WebSphere Commerce access control structure is flexible enough to support all entities in the supported business models. During instance creation, only the root organization and default organization are created. The basic access control structure is installed during instance creation, regardless of the business model.

## Basic access control



### Legend



The root organization owns the following default policy groups:

- Management and administration
- Common shopping
- B2C
- B2B

The default organization owns the following default policy groups:

- Guest shopper management

However, the root organization only subscribes to the management and administration policy group. The policies in this policy group apply to all of the resources owned by this root and its descendants, except for those descendants that subscribe to a policy group. Since the default organization subscribes to the policy groups, the policies from the root organization are not inherited. For the default organization, the policies in the management and administration and guest shopper management policy groups are applied to any resources owned by the default organization.

For more detailed information on the default policy groups, see the appendix of the *IBM WebSphere Commerce Security Guide*.

## Supply chain store archives

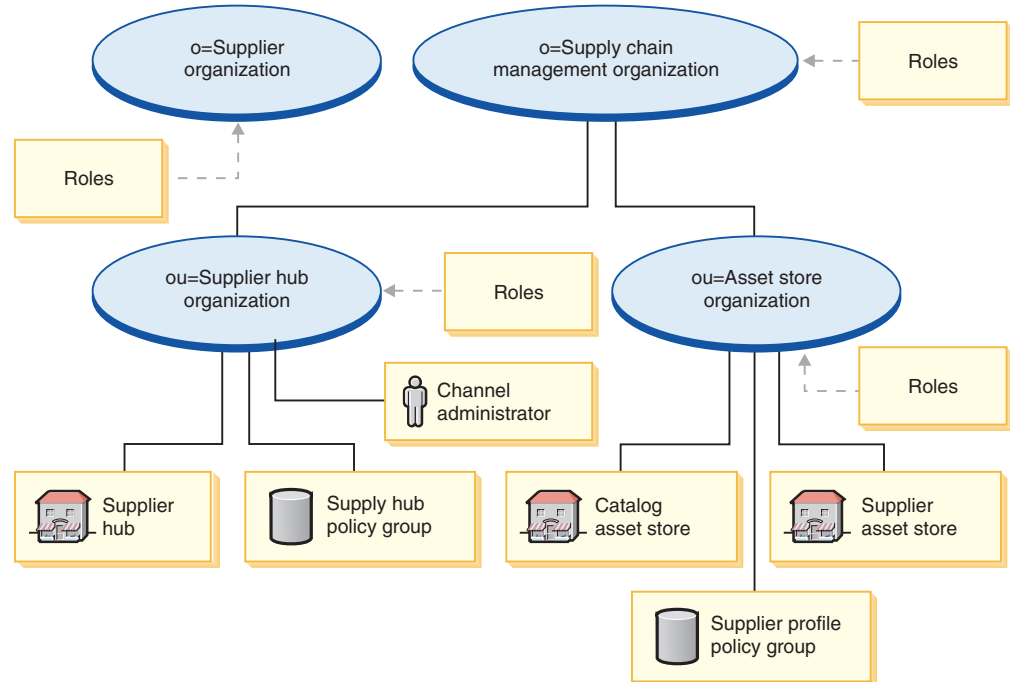
The following SAR files are associated with the supply chain business model:

Table 13. Supply Chain

Store archive name	Description
SupplyChain.sar	Contains the organization structure, predefined user roles, and necessary access control policies and policy group subscriptions to create a supplier marketplace channel environment.
SupplyChainOrganizationStructure.sar	Contains the organization structure and predefined user roles to create a supply chain environment
SupplierHub.sar	Contains all the necessary assets to create a hub site.
CatalogAssetStore.sar	A sample store archive containing all the necessary assets to create a shared catalog.
SupplierAssetStore.sar	Contains all the necessary assets to create a supplier storefront.

The roles on an organization indicate the possible roles that a user can play within the organization. For more information on roles, see the WebSphere Commerce online help.

### SupplyChain.sar contents

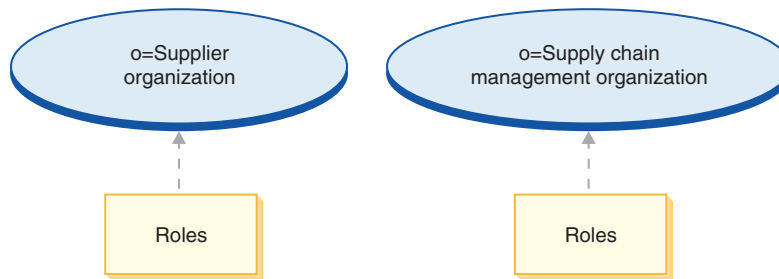


- Supply Chain Management Organization and roles: Seller, Marketing Manager, Operations Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Supplier organization and roles: Account Representative, Buyer (Buy-side), Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Logistics Manager, Marketing Manager, Pick Packer, Product

Manager, Receiver, Returns Administrator, Sales Manager, Seller, Seller Administrator, Store Administrator, Registered Customer, Buyer Administrator, Buyer Approver, Procurement Buyer, Procurement Buyer Administrator, Channel Manager

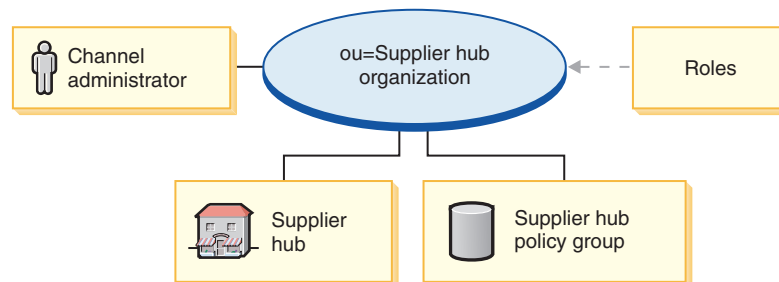
- Supplier hub organization and roles: Seller, Marketing Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Asset Store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Supplier Hub store
- Supply Hub Catalog
- Supplier asset store
- Policy group: Supplier Hub Policy Group, Supplier Asset Policy Group
- Channel administrator

**SupplyChainOrganizationStructure.sar contents**



- Supply Chain Organization and roles: Seller, Marketing Manager, Operations Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Supplier organization and roles: Account Representative, Buyer (Buy-side), Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Logistics Manager, Marketing Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Sales Manager, Seller, Seller Administrator, Store Administrator, Registered Customer, Buyer Administrator, Buyer Approver, Procurement Buyer, Procurement Buyer Administrator, Channel Manager

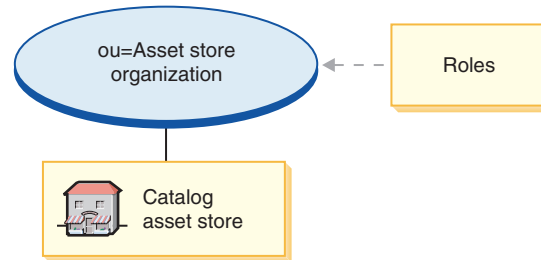
**SupplierHub.sar contents**



- Supplier hub organization and roles: Account Representative, Buyer (Buy-side), Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Logistics Manager, Marketing Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Sales Manager, Seller, Seller Administrator, Store Administrator, Registered Customer, Buyer Administrator, Buyer Approver, Procurement Buyer, Procurement Buyer Administrator, Channel Manager

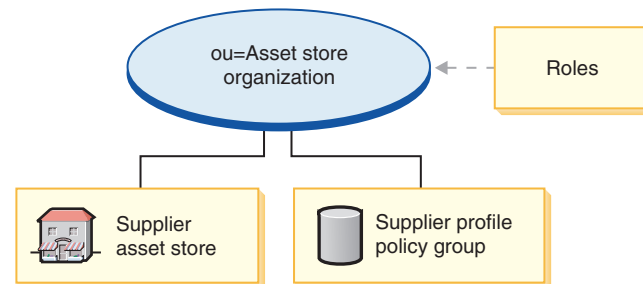
- Commerce Supplier Hub (store)
- Supplier Hub Policy Group
- Channel administrator

#### CatalogAssetStore.sar contents



- Catalog Asset Store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Supplier Hub catalog

#### SupplierAssetStore.sar contents

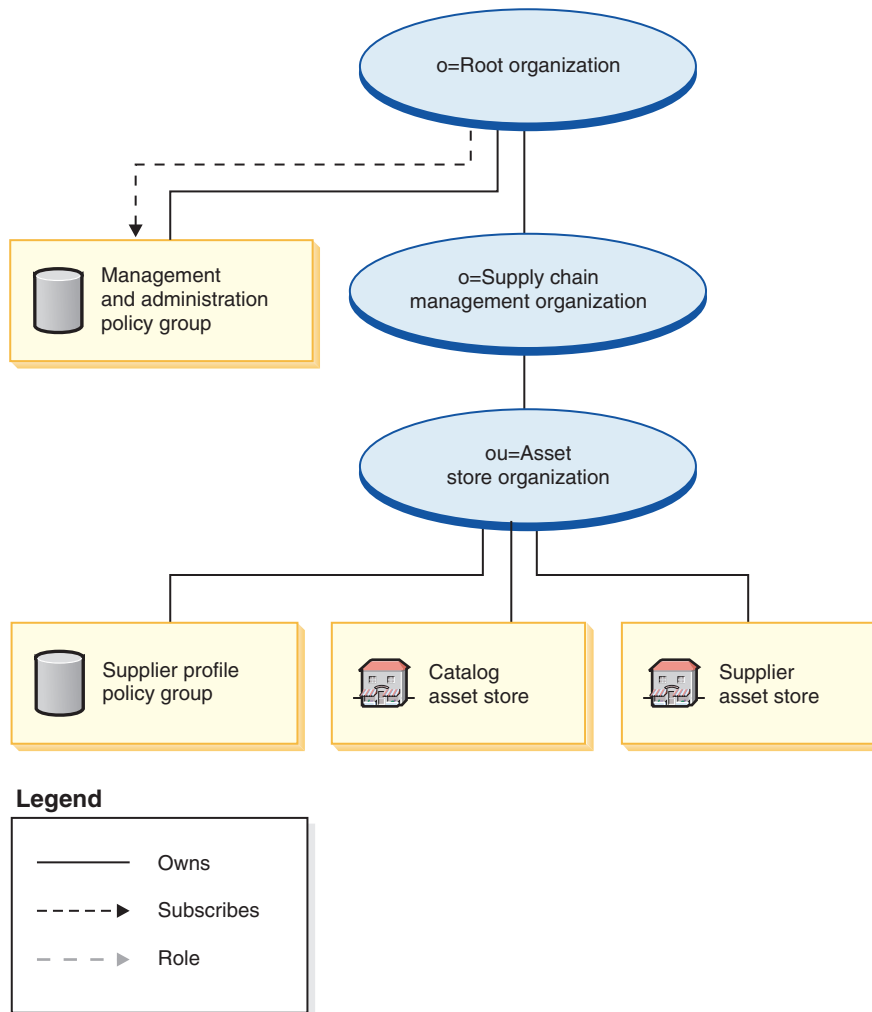


- Supplier Asset Store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Supplier asset store
- Supplier asset Policy Group

## Deployment of SAR

This section illustrates the deployment of SupplyChain.sar into your instance. It illustrates the policy subscriptions and access control roles that are set up as part

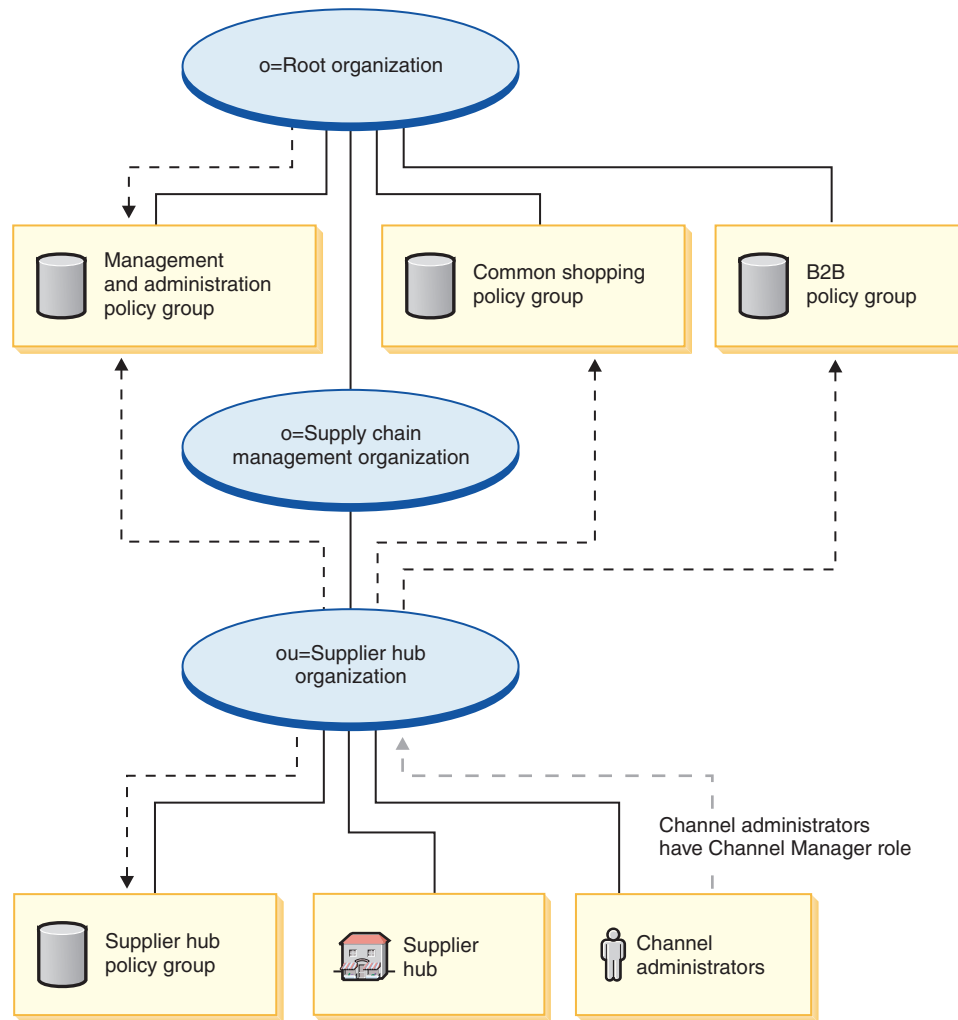
of this deployment.



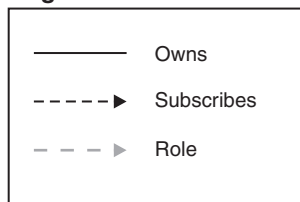
The asset store organization does not subscribe directly to any policy groups. As a result it inherits the management and administration policy group from the root organization. These policies apply to the asset store organization and the asset stores that it owns. The asset store organization owns the supplier profile policy group, but does not subscribe to it.



**Note:** The individual supplier's B2B direct organization will subscribe to the supplier profile policy group when the supplier store is created.



**Legend**

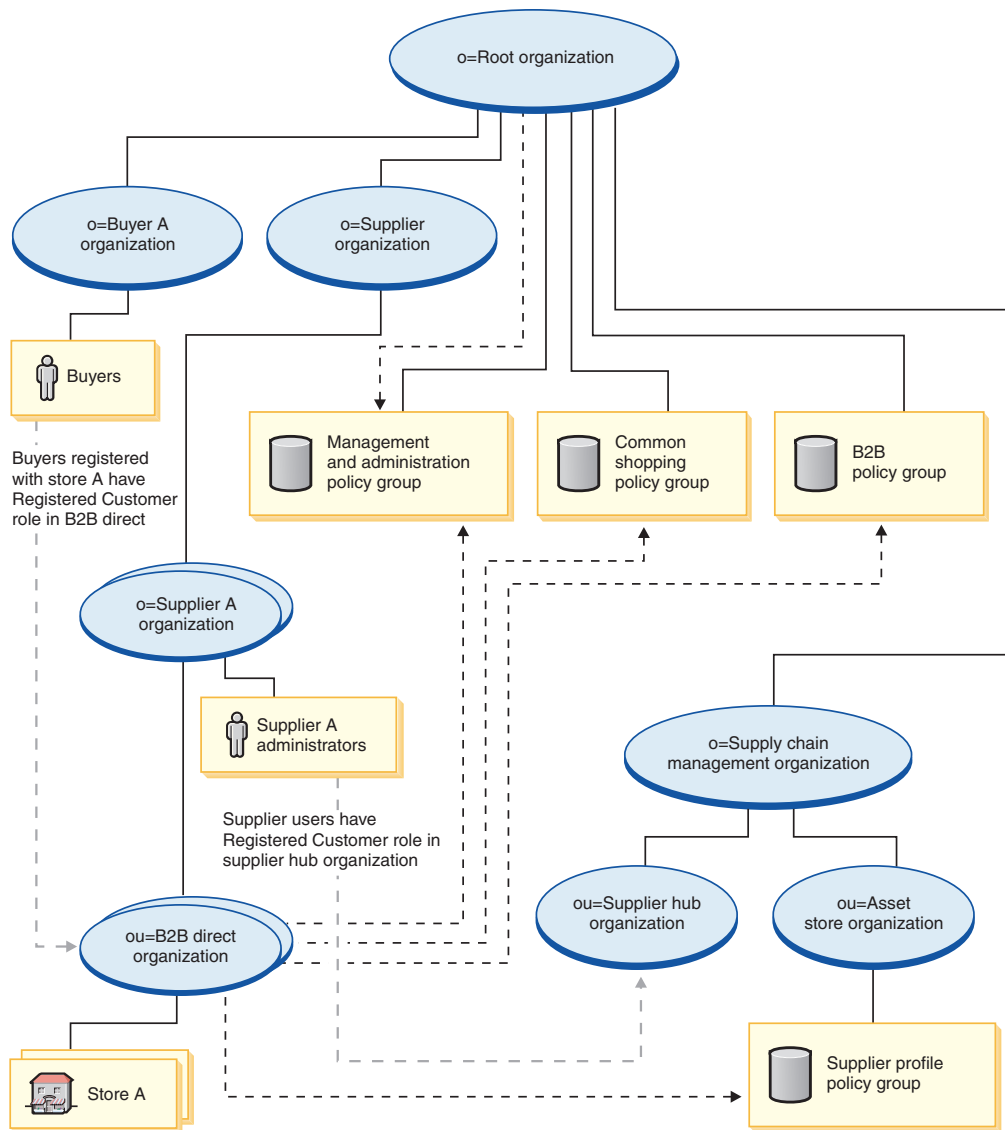


The supplier hub organization subscribes directly to the management and administration policy group, the common shopping policy group, the B2B policy group and owns and subscribes to the Supplier hub policy group. As a result, these policies apply to the channel administrators, who are directly under the supplier hub organization, as well as to the supplier hub.

The Supplier hub policy group contains the following policies:

- AllUsersForSupplierHubExecuteSupplierHubAllUsersViews
- RegisteredCustomersForOrgForSupplierHubExecuteSupplierHubRegisteredCustomerViews
- ContractAdministratorsForChannelOrgExecuteCreateCommandsOnMemberResource

- ContractAdministratorsForChannelOrgExecuteContractDeploy CommandsOnContractResource
- ContractAdministratorsForChannelOrgDisplayContract DatabeanResourceGroup



**Legend**



The supplier organization does not subscribe directly to any policy groups. As a result it inherits the management and administration policy group from the root organization. These policies apply to the supplier organization, the supplier A organizations that it owns, and the supplier A administrators.

The B2B direct organization subscribes directly to the management and administration, the common shopping, B2B and supplier profile policy groups. These policies apply to all stores owned by the B2B direct organization.

The Supplier profile policy group contains the following policies:

- AllUsersForSupplierExecuteSupplierAllUsersViews
- RegisteredCustomersForOrgForSupplierExecuteSupplierRegisteredCustomer Views

Buyers are customers that place orders in a B2B store. All buyers must be owned by a buyer organization. Typically, buyer organizations do not subscribe to any policy groups, since management and administration policies inherited from the root organization are sufficient.

## Dynamically created roles

Customers are granted the Registered Customer role in the Supplier Organization and in the Supplier Hub Organization, and the Buyer (buy-side) role in their parent organization.

When you register a new buyer, the following roles are assigned:

- The new buyer organization gets the roles: Buyer (buy-side), Buyer Approver, Buyer Administrator, Procurement Buyer Administrator, and Procurement Buyer.
- The administrator created for the buyer organization is granted the role of Buyer Admin in the new buyer organization, and Registered Customer in the Supplier organization, Supplier Hub organization, and in the organization that owns the store for which the buyer is being registered.

When you register a new supplier, the following roles are assigned:

- The new supplier organization gets the roles: Seller, Category Manager, Logistics Manager, Marketing Manager, Sales Manager, Seller Administrator, Registered Customer, Buyer (buy-side), Buyer Approver, and Buyer Administrator
- The administrator created for the new supplier organization is granted the Seller and Seller Administrator roles in the new supplier organization, and the Registered Customer role in the Supplier organization, and in the Supplier Hub organization

This information is picked up from the MemberRegistrationAttributes.xml file. For more information, see “Roles and the MemberRegistrationAttributes XML file” on page 40r the WebSphere Commerce online help.



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## Chapter 19. Supply chain sample store (Supplier Hub) overview

Commerce Supplier Hub is the new sample store of a Supply chain site provided with WebSphere Commerce. The main site includes the Commerce Supplier Hub, an aggregate or master catalog, and the assets required to publish supplier hosted stores. The Hub is a place where suppliers, and buyers come together. Use this sample to get started on setting up a hosting site where you will be able to host sellers with an aggregate catalog, or to create a sort of a marketplace, where buyers and sellers can come together in one environment.

Sample store features include:

- Existing ToolTech features

Self-provisioning features include:

- Buyer and seller self-register both organizations and users with the Supplier hub
- Request to host a store
- Create a store with Store Creation Wizard, change look and feel
- Manage a store
- Organization administration

Aggregated catalog features include:

- All supplier catalog data are aggregated into the supplier hub
- Buyers can navigate and get offer or contract prices in the aggregated catalog from different suppliers

Commerce Supplier Hub provides all the pages and features necessary for a functioning online store. Commerce Supplier Hub is packaged with WebSphere Commerce as a store archive. In some cases, publishing a store archive to a WebSphere Commerce Server allows you to create a running store. In WebSphere Commerce, Business Edition, sample store archive files are also used to package and deliver organization structures, predefined user roles, and access control policies necessary to create the environment for your store or site, as well as collections of store assets that create a catalog or a storefront. In order to create a running store, you must publish one of the composite store archives. You can also publish a sequence of component store archives to publish a running store. Stores are published from the Administration Console; only Site Administrators can publish a store archive by selecting Site, and from the Store Archives menu, selecting Publish. The Store Archives page then displays listing the store archives available for publish. By default, the page showing composite store archives displays. For more information on publishing a store archive, see the WebSphere Commerce online help publishing information.

Since store creation in WebSphere Commerce is based upon selecting a sample store archive and modifying it, Commerce Supplier Hub is designed to act as the basis for your store. It is based on a typical shopping flow. The sample store pages can be customized. All Commerce Supplier Hub sample store pages are JavaServer Pages. These pages include HTML, Java, and JavaScript. The JSP files can be cached.



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## Chapter 20. Creating a store using the Commerce Supplier Hub sample

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### Part one: Publish and configure a store based on Commerce Supplier Hub

To create a store using the Commerce Supplier Hub sample store (SupplyChain.sar), you must publish it, and then, optionally, you may configure it. For information on how to publish and configure a sample, see “Part one: Publish and configure a store based on FashionFlow” on page 29, *Publishing a store using the Administration Console* and *Configuring a store using the WebSphere Commerce Accelerator*, substituting Commerce Supplier Hub for FashionFlow, when necessary.

You will get the Supplier Hub, the Supplier Hub Catalog Asset Store (for managing the aggregated catalog), and the Supplier Asset Store (the default asset store for all hosted supplier stores). After publishing a sample store, you may be required to perform additional steps to get the store running at full functionality. Those steps follow.

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### Part two: Creating scheduled jobs for a sample store

After publishing a sample store, scheduled jobs needs to be created for the store in the WebSphere Commerce Accelerator. For details on how to configure e-mail notification for a sample store, see “Part one: Publish and configure a store based on FashionFlow” on page 29

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### Part three: Configuring e-mail notification for a sample store

This procedure enables customer e-mail notification when payment is authorized, when an order is authorized, and when an order is cancelled. Note that you must have a mail server set up in order to e-mail customers. For details on how to configure e-mail notification for a sample store, see “Part one: Publish and configure a store based on FashionFlow” on page 29

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### Part four: Enabling and disabling RFQs

Before you can use the RFQ trading mechanism, the Site Administrator must enable RFQs using SQL scripts that can be found in the WC directory created as part of the WebSphere Commerce installation process. To enable RFQs, see *Enabling and disabling the RFQ trading mechanism* in the WebSphere Commerce online help.

RFQ notification messages are used to notify customers of key events that take place during RFQ negotiations. To enable RFQ notification messaging, see *Enabling RFQ notification messaging* in the WebSphere Commerce online help.

For a tutorial on RFQs, see “Using RFQs” on page 137.

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### Part five: Enabling auctions

For information on enabling auctions, see the WebSphere Commerce online help. For auction tutorials, see “Using auctions” on page 204

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## Part six: Setting up WebSphere Commerce Payments for your store

For information on setting up WebSphere Commerce Payments, refer to the WebSphere Commerce online help.

*Prerequisites for this verification are:* the supplier organization has registered, a supplier hosted store is created, and offers have been created in such a way that a buyer user can complete the order flow.

If you have WebSphere Commerce Payments set up, and would like to test a payment, do the following:

1. Register and shop at the store.
2. Add an item to your shopping cart.
3. Checkout.
4. To complete your order, enter your credit card information. For the purposes of this test, enter the following:
  - a. From the **Credit card type** drop down list, select **Visa** (assuming it is in your WebSphere Commerce Payments account).
  - b. In the **Card number** field, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2003.
  - e. Click **Order now**. The Order confirmation page displays, stating the details of your order.

### Notes:

1. If WebSphere Commerce Payments was not installed or not running at the time of publishing, the brand types configured in WebSphere Commerce Payments should match the brand types specified for contract 3456 for Credit Card.
2. If you want to use collaboration features with the Commerce Supplier Hub store, you must first install Lotus Sametime for the Customer Care feature, or Lotus QuickPlace for the Collaborative Workspaces feature. For more information on the installation of Lotus Sametime and Lotus QuickPlace refer to the *IBM WebSphere Commerce Additional Software Guide*.
3. If customers are using a double-byte language and type lengthy information into text fields, they may encounter an error due to the length of the entry exceeding what is allowed in that field. To correct this, you may want to add code to limit the UTF8 string length that customers type in.

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## Part seven: Provide sample catalog.csv file for sellers to download

It is recommended to place the sample catalog.csv file for sellers to download from the Commerce Supplier Hub. This sample could serve as a starting point for sellers to create their catalog structure. A sample can be found in the samples directory: `/WC_installdir/samples/catalogimport/catalog.csv`

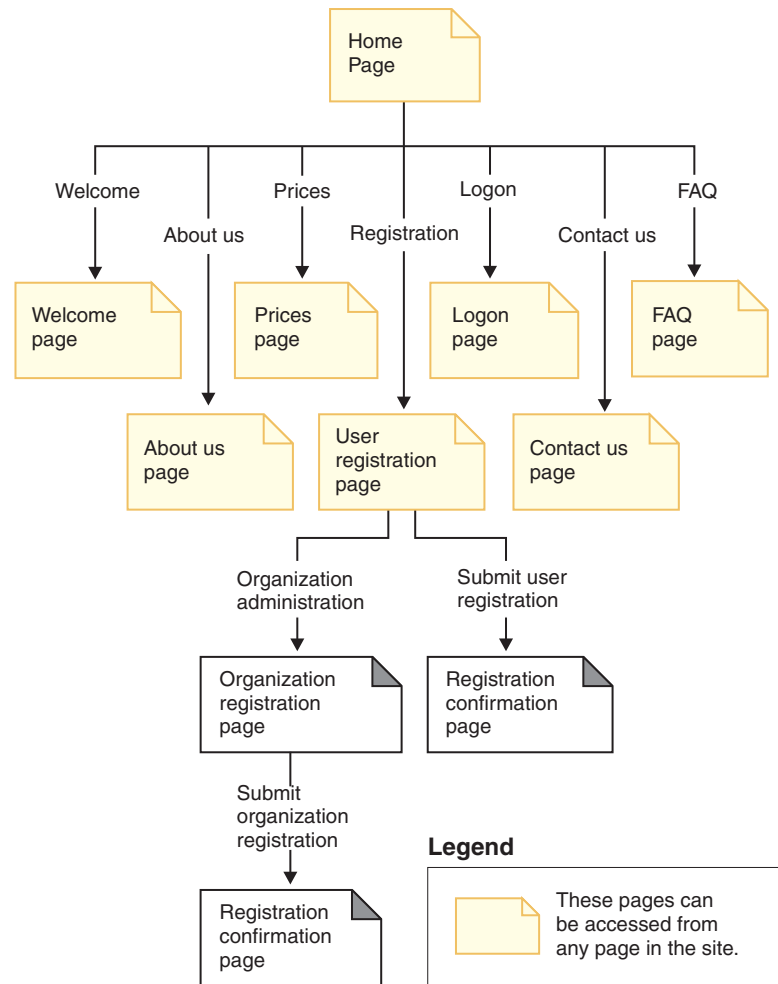
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## Commerce Supplier Hub store flows

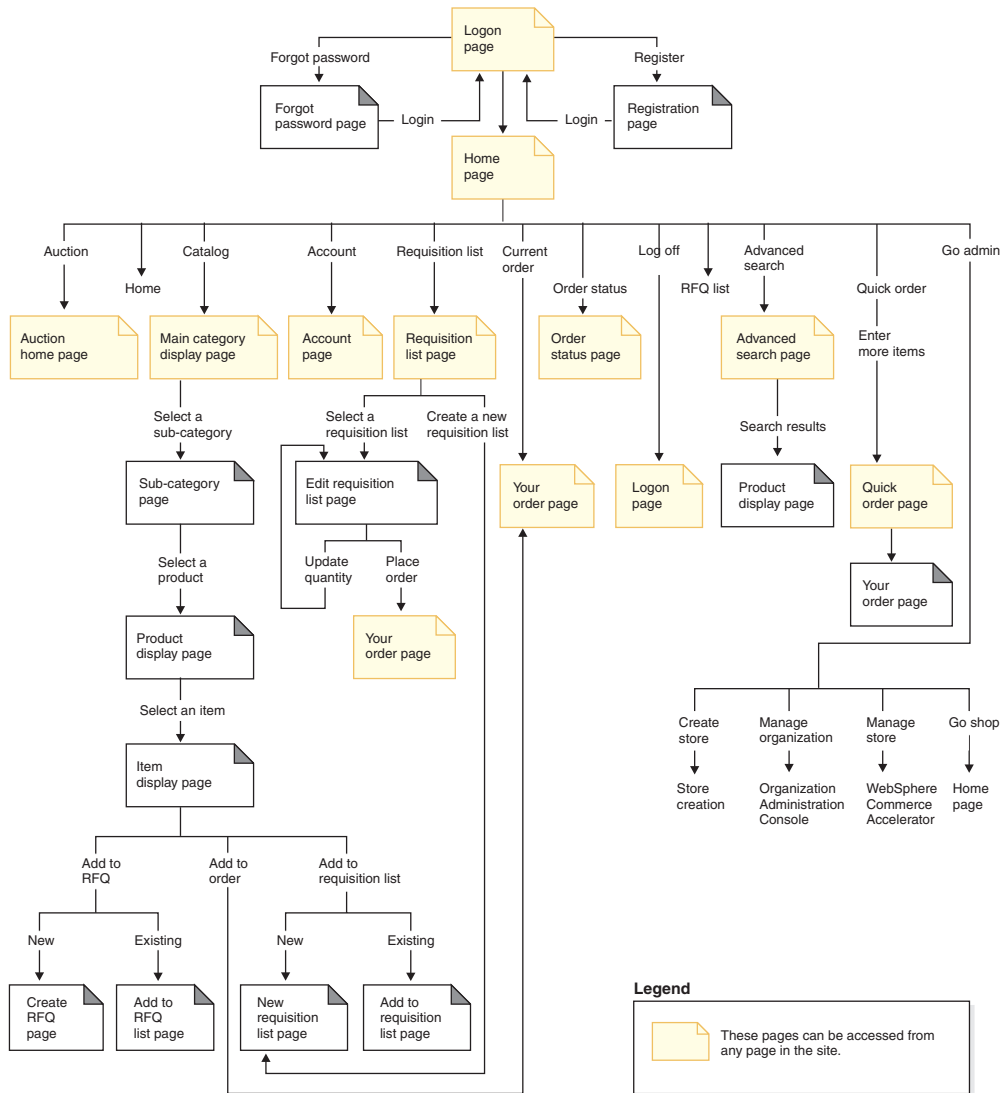
The following diagrams show the Commerce Supplier Hub store flow, and the Commerce Supplier Marketplace store flow.



## Commerce Supplier Hub store flow



# Commerce Supplier Marketplace store flow



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## Chapter 21. Commerce Supplier Hub tutorials

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### Sending messages (comments, feedback, suggestions) to the Site Administrator

#### Demonstrates

- Business** This tutorial illustrates the following features of Commerce Supplier Hub:
- Send messages to the Site Administrator.

#### Prerequisite

Before starting this tutorial, make sure the configure e-mail notification for the site section has been completed.

#### Sending messages

To send a message to a site administrator, a merchant can do the following:

1. Go to the Commerce Supplier Hub site at `http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp`.
2. Click **Contact us**.
3. Select the reason from the drop down list and fill in the message.
4. Click **Submit**.

---

### Self-registering in the Commerce Supplier Hub

#### Demonstrates

- This tutorial illustrates the following features of Commerce Supplier Hub:
- Register a new buyer.
  - Register a new seller.

#### Buyer organization and buyer self-register

1. Go to the Supplier Hub at `http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp`
2. Click **Register > Register Organization**. to register a new buyer organization.
3. Fill in the required information, and select **Buyer** as the role of the organization. Note the name of the buyer organization and name and password of the buyer administrator. Click **Submit**.
4. The Site or Supplier Hub Administrator can approve the buyer organization.
  - a. From the Supplier Hosting Hub, click **Logon**.
  - b. Logon as the Site Administrator or Supplier Hub Administrator.
  - c. Click **Go admin > Manage Organization**.
  - d. Click **Approvals > Approval Requests**.
  - e. Select the new seller registration and click **Approve**
  - f. Click **OK**.
5. Click **Register** to register a new buyer.

6. Type the name of the buyer organization and select **Buyer** as the role of the organization.
7. Fill in the required information. Note the name and password of the buyer.
8. Click **Submit**.
9. Click **Logon**, and logon as the buyer administrator to approve the registration of the buyer.
10. Click **Go admin > Manage Organization**.
11. Click **Approvals > Approval Requests**.
12. Select the approval request and click **Approve**.
13. Click **OK**.
14. Click **Logoff**
15. Logon as the buyer.

## **Seller organization and seller self-register**

To self-register in the Commerce Supplier Hub, a prospective seller can do the following:

1. Go to the Commerce Supplier Hub at <http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp>
2. Click **Register > Register Organization**.
3. Fill in the required information, and select **Seller** as the role of the organization. Note the name of the seller organization and name and password of the seller administrator. Click **Submit**.
4. From the Supplier Hosting Hub, click **Logon**.
5. Logon as the site administrator.
6. Click **Go admin > Manage Organization**.
7. Click **Approvals > Approval Requests**.
8. Select the new seller registration and click **Approve**.
9. Click **OK**.
10. Click **Logoff**.

To self-register a seller:

1. Click **Register** to register a new seller.
2. Type the name of the seller organization and select **Seller** as the role of the organization
3. Fill in the required information. Note the name of the seller organization and name and password of the seller. Click **Submit**.
4. From the Supplier Hosting Hub, click **Logon**.
5. Logon as the seller administrator to approve the registration of the new seller and assign the seller role to the seller.
6. Click **Go admin > Manage Organization**.
7. Click **Approvals > Approval Requests**.
8. Select the approval request and click **Approve**.
9. Click **OK**.
10. Click **Access Management > Users**.
11. Select the seller and click **Roles**.
12. Assign the seller role to the seller.
13. Click **OK**.

14. Click **Logoff**.
15. Logon as seller.

---

## Creating a hosted store

### Demonstrates

This tutorial illustrates the following features of Commerce Supplier Hub:

- Creating a hosted store using the store creation wizard.

### Prerequisites

The person creating the store must have the role of Site Administrator or Organization Administrator.

## Creating a hosted store

**Note:** *This note is for the value chain hosted stores created with the Store Creation Wizard only.* When a seller creates a hosted store, this is not a *regular* store publish, and additional store language data assets beyond the store default language are not carried over into the hosted store. So, if a seller adds a supported language to a store, the store assets for that language are not available. If a supported language is going to be added to a hosted store, ensure that the translated assets (store data, and properties files) are available to the store or the store pages will not function correctly.

1. Go to the Commerce Supplier Hub at <http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp>
2. Logon as the seller administrator.
3. Click **Go admin > Create Store**.
4. Click **OK**.
5. Fill in the required information, and select the seller organization as the store organization. Click **Next**.
6. Select **Supplier Asset Store** as the store type. Click **Next**. Click **Next**.
7. Type the name of the fulfillment center, and click **Add**. Click **Next**.
8. Select **Credit Card (processed offline)**, add all available brands by selecting a brand and the store currency and click **Add**.
9. Review the store creation summary and click **Finish**.
10. Click **Bookmark Store** to bookmark the hosted supplier store.
11. Click **Close**.
12. Click **Logoff**.

---

## Uploading new categories, products, items, or offers

### Demonstrates

This tutorial illustrates the following features of Commerce Supplier Hub:

- Seller uploads new categories, products, items, or offers

### Prerequisite

Before starting this tutorial, there needs to be a supplier that has created a hosted store.

## Uploading new categories, products, items, or offers

1. Go to the Supplier Hub at `http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp`
2. Logon as a seller.
3. Click **Go admin > Manage Store**.
4. Click **Products > Catalog Import**.
5. Select **Upload Catalog**.
6. Click **Browse**.
7. Locate and open the sample catalog.
8. Click **Upload File**.
9. Click **OK** to dismiss the dialog.
10. Select the uploaded catalog and click **Publish Catalog**.
11. Periodically hit refresh until the status changes from *Publishing* to *Published*.
12. Click **Upload Images**, click **Browse**, and locate an image you want to upload.
13. Click **Upload**.
14. Click **Close**.
15. Logoff as seller.
16. Logon on buyer.
17. Click **Browse Catalog**. Note the presence of the new categories, products, items, or offers.

---

## Creating a new category, product, item, or offer

### Demonstrates

This tutorial illustrates the following features of Commerce Supplier Hub:

- Seller creates a new category, product, item, or offer.

### Prerequisite

Before starting this tutorial, there needs to be a supplier that has created a hosted store.

## Creating a new category, product, item, or offer

1. Go to the Supplier Hub at `http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp`
2. Logon as a seller.
3. Click **Go admin > Manage Store**.
4. Click **Products > Categories**.
5. Click **New...**
6. On the General page, fill in the required information (description is not required but should be filled in). Check *Display to customers*. Click **Next**. The Parent Category page displays.
7. Click on category that is not in the top level, such as Woodworking, and Click **Next**. The Images page displays.
8. You do not need to enter any images. Click **Finish**.
9. Locate and click on the newly created category by expanding Woodworking. Select **List Products**.
10. Click **Action > New Product**.

11. the General page displays. Fill in the required information. Note its code and name. Ensure that *Display to customers* and *For purchase* are checked. Click **Next**. The Description page displays.
12. Type a short description, and a long description if desired, and click **Next**.
13. Locate and click on the newly created category. The product can be created under a category owned by the Supplier Hub as well.
14. Click **Next** to return to the Create Product page. The images can be set later.
15. Click **Finish**. A dialog appears, stating that it is recommended that you set the price and create attributes before creating SKUs. To do so, select the product and click **Pricing** or **Attributes**. However, defining attributes to generate multiple SKUs will not be discussed in this tutorial.
16. Select the newly created product. Click **Actions** > **Generate SKUs**. Click **OK** until you dismiss the dialog.
17. Now, create an offer for the newly created product (see the tutorial called *Seller creates an offer for a product owned by the Supplier Hub*). If you log off as seller, and log on as a buyer browsing the aggregate catalog, you will note the presence of the new category, product, item, or offer.

## Creating an offer for a product owned by the Supplier Hub

1. Go to the Supplier Hub and logon as a buyer.
2. Click **Browse Catalog**.
3. Click **Woodworking** > **Woodworking saws** > **Circular saw**.
4. Click the item with the SKU **T0000106**. Note the list of supplier stores/contracts offering this item. There may not be any.
5. Logoff as a buyer.
6. Logon as a seller.
7. Click **Go admin** > **Manage Store**.
8. Click **Products** > **Categories**.
9. Click on **Supplier hub shared catalog** > **Woodworking** > **Woodworking saws** and Click **List Products**.
10. Right click on the product with the code T0000102 and click **Set Prices**. The seller cannot change the product since it is owned by the Supplier Hub and not the seller organization.
11. Type a price and click **OK**. If you would like, you can also add a price range for this product.
12. Logoff as seller.
13. Logon as buyer.
14. Click **Browse Catalog**.
15. Click **Woodworking** > **Woodworking saws** > **Circular saw**.
16. Click the item with the SKU **T0000106**. Note the presence of the new offer with store, contract, and price information.

---

## Resuming a new hosted store

### Demonstrates

This tutorial illustrates the following features of Commerce Supplier Hub:

- Resume a hosted store from the suspended state.

## Prerequisites

The hosted store must be in the suspended state.

## Resuming a new hosted store

To resume a new hosted store, a site administrator can do the following:

1. Go to the Commerce Supplier Hub site.
2. Click **logon** and use the site administrator.
3. Click **manage store**.
4. Select SupplierMarketplace and click **OK**.
5. Click **Suppliers > Hosted Stores**.
6. Select the hosted store and click **Resume**.

---

## Opening a store for business

### Demonstrates

This tutorial illustrates the following features of Commerce Supplier Hub:

- Open store for business.

### Prerequisite

Before starting this tutorial, there needs to be a supplier that has created a hosted store, and it must be out of the *suspended* state.

1. Go to the Supplier Hub at  
`http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp`
2. Logon as a seller administrator.
3. Click **Go admin > Manage Store**.
4. Click **Store > Open/Close**.
5. Click **Open Store**.
6. Click **Launch Store** to launch the supplier store.

---

## Completing a simple purchase

### Demonstrates

This tutorial illustrates the following features of Commerce Supplier Hub:

- Buyer completes a simple purchase.

### Prerequisite

Before starting this tutorial, there needs to be a buyer that has registered, and a store with a catalog.

### Buyer completes purchase

1. Go to the Commerce Supplier Hub at  
`http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp`
2. Logon as buyer.
3. Click **Browse Catalog**.
4. Browse to the item display page of an item that has offers. For example,
5. Select an offer and click **Add to Order**. Note the fact that the buyer can also add the item to a requisition list or an RFQ.



6. Click **Catalog**, browse to another item with an offer from a different supplier store. Select that offer and click **Add to Order**.
7. Click **Select a supplier**. Note the fact that orders are separated by supplier stores and that they have to be checked out individually. For one of the orders, click **Check out this Order**.
8. Select **Credit Card - VISA** as the payment method and click Next.
9. Click **Next**.
10. Review the order summary, then type 4111111111111111 as the Card Number.
11. **Click Order Now**. Note the fact that the buyer can schedule a recurring order based on this order by clicking **Schedule Order** which will not be shown in this demo.
12. Review the order confirmation.

---

## Using RFQs

### Demonstrates

This tutorial illustrates the following features of Commerce Supplier Hub:

- Creating a multi-party RFQ.
- Responding to a multi-party RFQ.

### Prerequisite

Before starting this tutorial, there needs to be a supplier that has created a hosted store.

### Buyer creates a multi-party RFQ

1. Go to the Supplier Hub at <http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp>
2. Logon as a buyer.
3. Click **Browse Catalog**.
4. Browse to the item display page of an item owned by the supplier Hub.
5. Make sure **New** (under Request for Quote) is selected. Click **Add to RFQ**.
6. Fill in the required information. Choose the closing rule *At a fixed end time OR when a specified number of responses are received*. (choosing *When a specified number of responses are received* is NOT recommended). Type 2 as the Minimum number of responses to close.
7. Enter the request price and quantity and click **Create**.
8. Click **Add Stores** to the target list of RFQ
9. Check two supplier stores and click **Add to target list**.
10. Click **Submit RFQ**.

### Seller respond to a multi-party RFQ

1. Go to the Supplier Hub at <http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp>
2. Logon as seller of a supplier store that's NOT targeted.
3. Click **Go admin > Manage Store**. Click **Sales > RFQs**. Note the absence of the RFQ.
4. Click **Logoff**.

5. Logon as the seller of a supplier store that IS targeted. Click **Go admin > Manage Store**. Click **Sales > RFQs**. Note the presence of the RFQ.
6. Select the RFQ and click **Respond**.
7. Fill in the required information. Click **Next**.
8. Click **Next**. Click **Next**.
9. Select the RFQ item and click **Respond**.
10. Enter the response price/quantity and click **OK**.
11. Click **Finish** and click **OK** to dismiss the dialog.
12. Select the RFQ and click **Responses**.
13. Select the newly created response and click **Summary** to review it.
14. Click **Submit**.
15. Click **OK** to confirm.
16. Logoff as seller.
17. Logon as buyer.
18. Go back to the RFQ you submitted as a buyer in *Buyer creates a multi-party RFQ* click the RFQ.
19. Click **List RFQ Responses**. Note the presence of the new response. Click the response to review it.
20. Logoff as buyer.
21. Logon as seller of the targeted supplier store in this tutorial. Repeat steps 6 through 15.
22. Now when you view the RFQ responses, you will see a second response and its *In evaluation* status. Review the second response.
23. Click **Accept all products** for one response and **Reject all products** for the other.
24. Click **Complete**.
25. Fill in the required fields and Click **Create order**.

---

## Using auctions

### Demonstrates

This tutorial illustrates the following features of Commerce Supplier Hub:

- Creating an auction.
- Creating bid rules.
- Creating an auction style.
- Creating an autobid to an auction.
- Creating a bid to an auction.

### Prerequisite

Before starting this tutorial, there needs to be a supplier that has created a hosted store.

### Supplier creates an auction

1. Go to the Supplier Hub at <http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp>
2. Logon as seller of a supplier store.
3. Click **Go admin > Manage store**.

4. Click **Products > Auctions**.
5. Click **New...**
6. Select the type of auction and click **Next**.
7. Click **Find** to find a SKU.
8. Type some information into the SKU, name, and short description fields, and click **Find**.
9. Select one SKU and click OK.
10. On the auction product page, type the quantity of the auction and click **Next**. Note that the quantity must be no greater than the available inventory for the SKU in the store.
11. Select the end date of the auction and make sure **Or** is selected, and click **Finish**.
12. Logoff as seller.

### Supplier creates a bid rule

1. Go to the Supplier Hub at <http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp>
2. Logon as seller of a supplier store.
3. Click **Go admin > Manage store**.
4. Click **Products > Auctions**.
5. Click **New...**
6. Type the name and description of the bid rule and select the bid rule type. Click **Next**.
7. Type the bid control rule that you want to create. Click **Finish**.
8. Logoff as seller.

### Supplier creates an auction style

1. Go to the Supplier Hub at <http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp>
2. Logon as seller of a supplier store.
3. Click **Go admin > Manage store**.
4. Click **Products > Auctions**.
5. Click **New...**
6. Type the name and select the auction type. Click **Next**.
7. Type the auction style duration information. Click **Next**.
8. Type the auction style pricing information. Click **Next**.
9. Type the file name to be used for the auction rule and auction item display. Click **Next**.
10. Select the bid control rule to be used for this auction style. Click **Finish**.
11. Logoff as seller.

### Buyer creates an autobid to an auction

1. Go to the Supplier Hub at <http://hostname/webapp/wcs/stores/servlet/SupplierMarketplace/index.jsp>
2. Logon as a buyer.
3. Click **Auction**.
4. Click **Current Auctions**.

5. Click **New AutoBid**.
6. If you have not seen this auction before, the auction rule page displays. Review the auction rule and click **New AutoBid**.
7. Type the information in the fields. Click **Submit**. Note that the Bid Value Per Item should be less than the Upper Limit for Auction. Also, that the Request quantity should be not greater than the Inventory.
8. Logoff as buyer.

---

## Subcategory page troubleshooting

When you create a product in FashionFlow, ToolTech, Commerce Plaza, or Supplier Marketplace, you must specify a short description for it. When the subcategory page lists the product, the JSP file takes the short description from the database. If the short description is not specified, the subcategory page will not see the description of the product in the list.

---

## Part 7. Hosting sample (Commerce Hosting Hub)

**Business** WebSphere Commerce provides you with a sample of a hosting business model. This part includes the following information:

- Hosting sample information
- Commerce Hosting Hub overview and set up information
- Commerce Hosting Hub tutorials



---

## Chapter 22. Hosting store archives

The hosting sample includes the Commerce Hosting Hub site, the store directory, a sample catalog, and the assets required to make a store.

---

### Hosting store archives and access control

Commerce Hosting Hub is the new sample of a hosting site provided with WebSphere Commerce. Use this sample to get started on setting up a hosting site where you will be able to host sellers with a partitioned catalog (that is, independent catalog) or host sellers who share the catalog assets provided by you.

What follows is a description of the organization and roles that are created in the three stages of setting up your sample: instance creation, SAR publish, dynamic entities.

#### Organization structure and instance creation

In order to allow customers or buyers to access your site, browse your catalog, and place orders; or to allow employees to administer the site, including updating the catalog, creating new promotions, or managing orders; or to allow resellers or other business partners to complete transactions on your site, all actors in your business scenario must be assigned a position in the WebSphere Commerce organization structure.

The WebSphere Commerce organization structure provides a framework for the actors, or entities, in your business scenario. This framework is organized in a hierarchical structure, which mimics typical organizational hierarchies with entries for organizations and organizational units and users. The organizations and organizational units in the framework act as owners for the parts of your business. All parts of your business, including customers, administrators, stores, catalogs and distributors, must be owned by an organization or organizational unit.

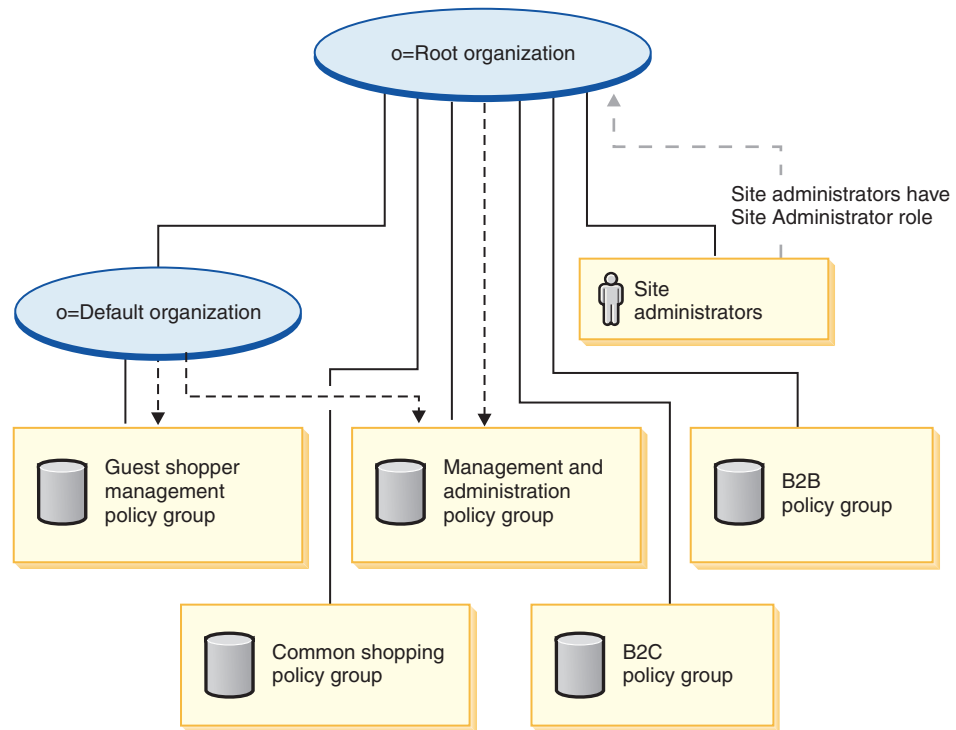
The organization structure and the access control model are closely related, in that the access control model applies access control policies to organizations rather than to different entities (stores, customers, administrators, and so on). The policies that apply to an entity (or resource) are applied to the organization that owns the entity or resource.

The following diagram outlines the basic WebSphere Commerce organization structure with access control.

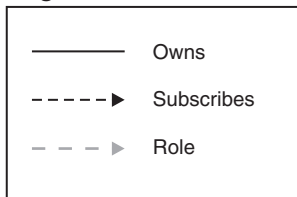
- **Root organization:** The root organization is the top level organization and is its own parent. All organizations in the WebSphere Commerce organization structure are descendents of the root organization. In this example the site administrators are owned by the root organization.
- **Default organization:** The default organization is under the root. All guest customers and all customers in consumer direct businesses belong to the default organization.
- **Child organizational entities:** One or more other levels of organizational entities can exist beneath the parent organizational entities. You can add as many child organizational entities as necessary to support your business.

The WebSphere Commerce access control structure is flexible enough to support all entities in the supported business models. During instance creation, only the root organization and default organization are created. The basic access control structure is installed during instance creation, regardless of the business model.

### Basic access control



#### Legend



The root organization owns the following default policy groups:

- Management and administration
- Common shopping
- B2C
- B2B

The default organization owns the following default policy groups:

- Guest shopper management

However, the root organization only subscribes to the management and administration policy group. The policies in this policy group apply to all of the resources owned by this root and its descendants, except for those descendants that subscribe to a policy group. Since the default organization subscribes to the policy groups, the policies from the root organization are not inherited. For the



default organization, the policies in the management and administration and guest shopper management policy groups are applied to any resources owned by the default organization.

For more detailed information on the default policy groups, see the appendix of the *IBM WebSphere Commerce Security Guide*.

## Hosting store archive

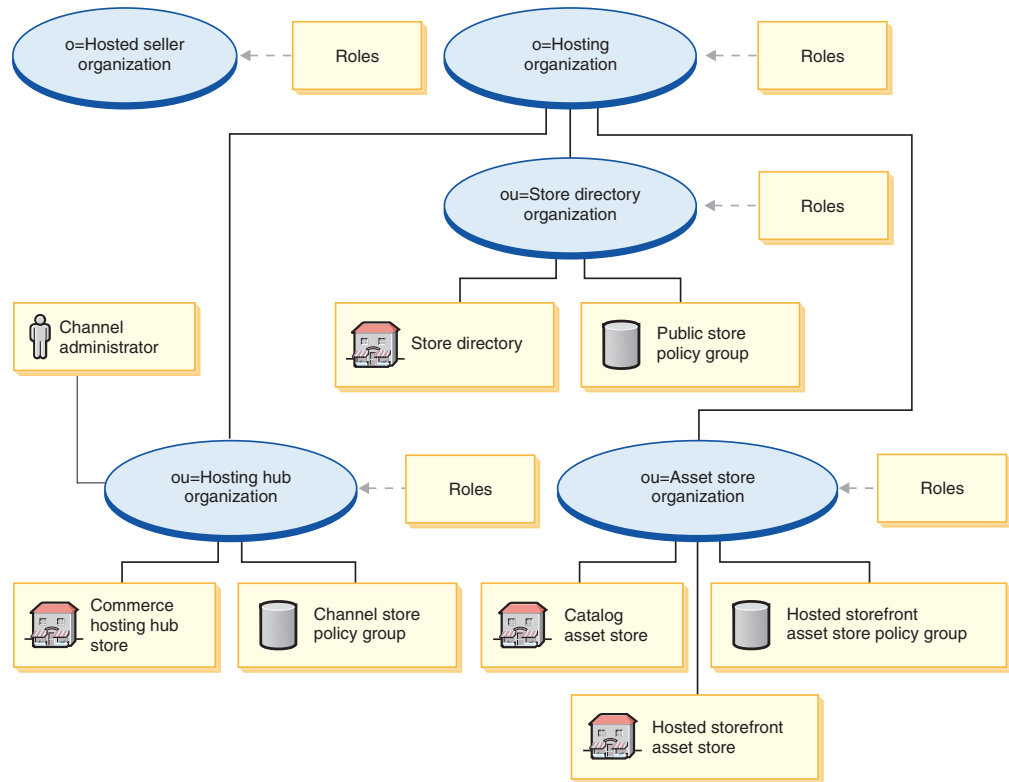
The following SAR files are associated with the hosting business model:

*Table 14. Hosting*

Store archive name	Description
Hosting.sar	Contains the organization structure, predefined user roles, and necessary access control policies and policy group subscriptions to create a reseller hosting environment, plus the necessary assets to create a hosting solution, including a service provider site, store directory, shared catalog, and hosted seller stores.
HostingOrganizationStructure.sar	Contains the organization structure, and predefined user roles to create a hosted environment.
StoreDirectory.sar	Contains all the necessary assets to create a navigable directory of all stores available in the site.
HostingHub.sar	Contains all the necessary assets to create the hub site.
CatalogAssetStore.sar	Contains all the necessary assets to create a shared catalog.
HostedStorefrontAssetStore.sar	Contains all the necessary assets to create a storefront.

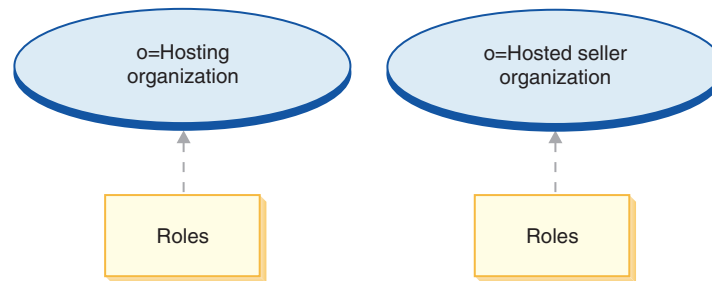
The roles on an organization indicate the possible roles that a user can play within the organization. For more information on roles, see the WebSphere Commerce online help.

## Hosting.sar contents



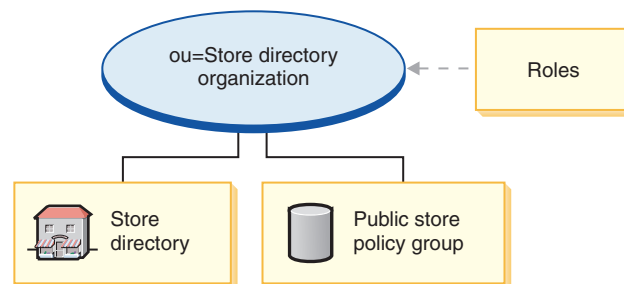
- Hosted seller organization and roles: Account Representative, Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Marketing Manager, Operations Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Sales Manager, Seller Administrator, Seller, Store Administrator, Channel Manager, Registered Customer
- Hosting organization and roles: Seller, Marketing Manager, Operations Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Hosting hub organization and roles: Seller, Marketing Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Store directory organization and roles: None
- Store directory (store)
- Asset store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Commerce Hosting Hub catalog
- Commerce Hosting Hub (store)
- Consumer Direct Hosting profile
- Policy group: Channel Policy Group, FashionFlow Policy Group
- Channel administrator

### HostingOrganizationStructure.sar contents



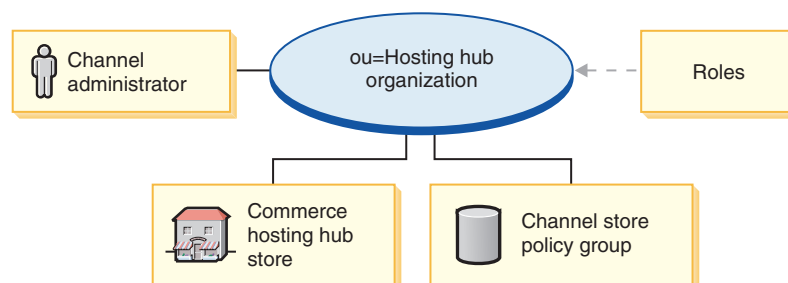
- Hosted seller organization and roles: Account Representative, Buyer (Sell-side), Category Manager, Customer Service Representative, Customer Service Supervisor, Marketing Manager, Operations Manager, Pick Packer, Product Manager, Receiver, Returns Administrator, Sales Manager, Seller Administrator, Seller, Store Administrator, Channel Manager, Registered Customer
- Hosting organization and roles: Seller, Marketing Manager, Operations Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer

### StoreDirectory.sar contents



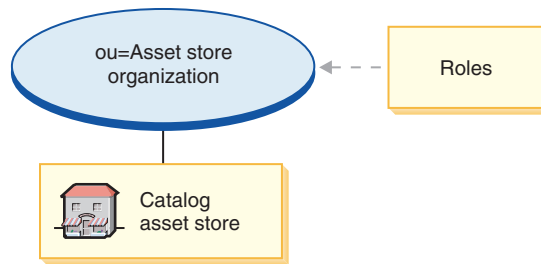
- Store directory organization and roles: None
- Store directory (store)

### HostingHub.sar contents



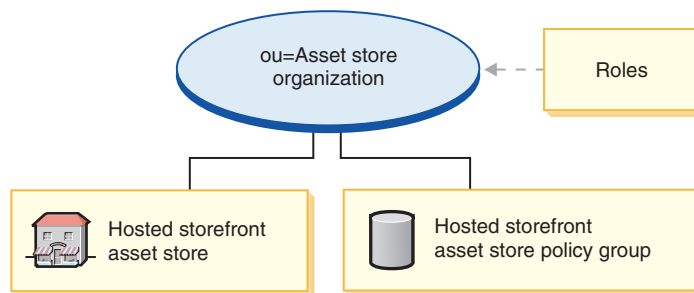
- Hosting hub organization and roles: Seller, Marketing Manager, Category Manager, Seller Administrator, Channel Manager, Registered Customer
- Commerce Hosting Hub (store)
- Policy Group: Channel Policy Group
- Channel administrator

### CatalogAssetStore.sar contents



- Asset store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Commerce Hosting Hub catalog

### HostedStorefrontAssetStore.sar contents

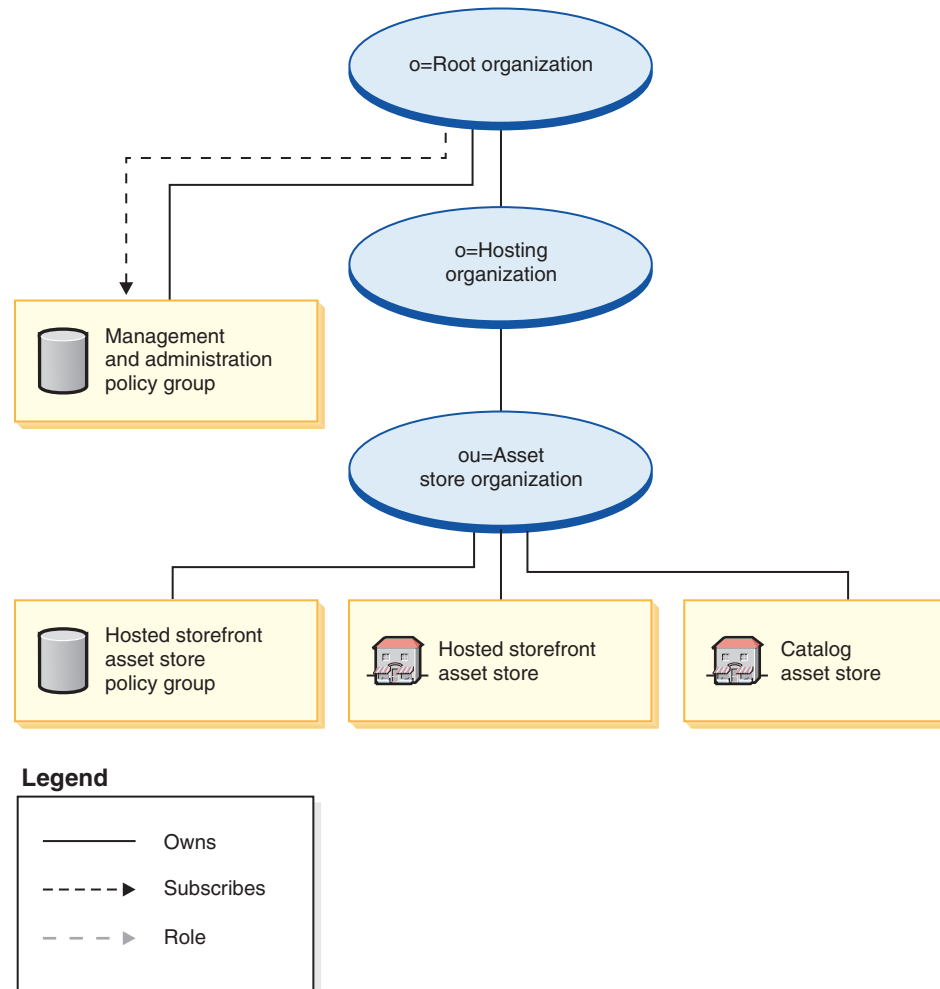


- Asset store organization and roles: Marketing Manager, Operations Manager, Category Manager, Channel Manager
- Consumer Direct Hosting profile store
- Policy Group: Fashion Flow Policy Group

## Deployment of SAR

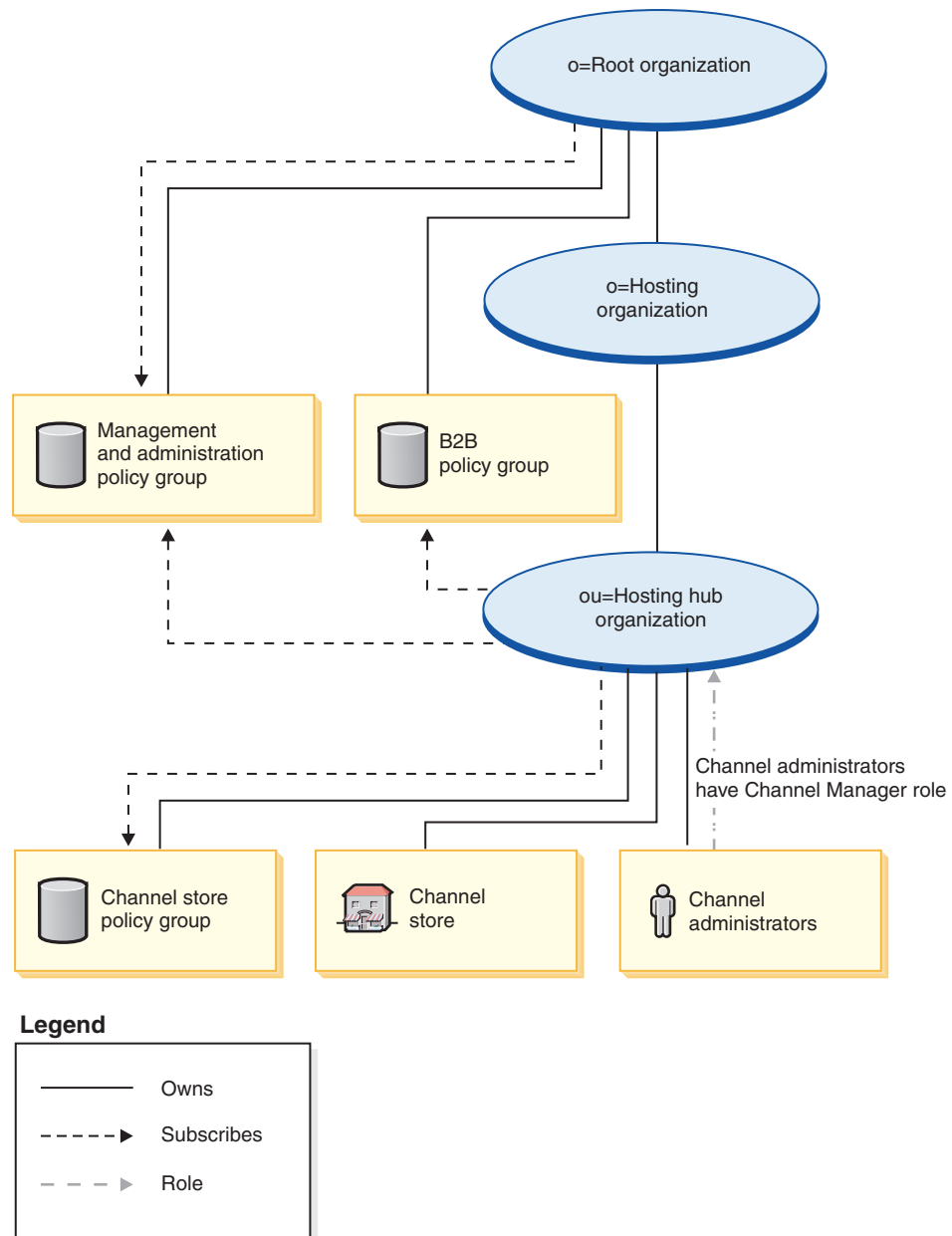
This section illustrates the deployment of Hosting.sar into your instance. It illustrates the policy subscriptions and access control roles that are set up as part

of this deployment.



The asset store organization does not subscribe directly to any policy groups. As a result it inherits the management and administration policy group from the root organization. These policies apply to the asset store organization and the asset stores that it owns. The asset store organization owns the hosted storefront asset store policy group, but does not subscribe to it.

**Note:** The individual hosted seller organizations will subscribe to the hosted storefront asset store policy group when the hosted store is created.

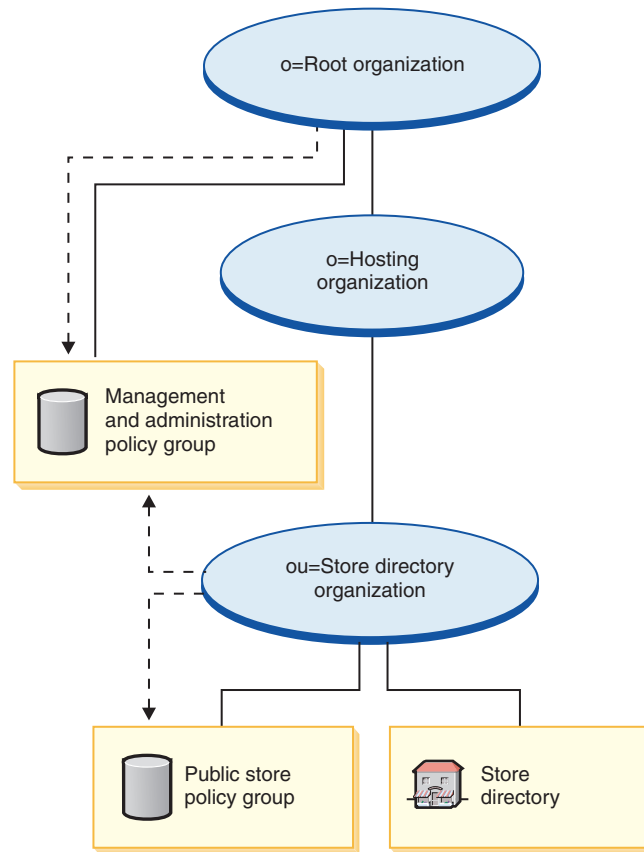


The hosting hub subscribes directly to the management and administration policy group, the B2B policy group, and owns and subscribes to the channel store policy group. As a result, these policies apply to the channel administrators, who are directly under the hosting hub organization, as well as to the channel store (hosting hub).

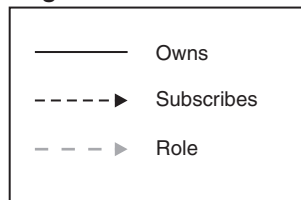
The hosting hub policy group contains the following policies:

- AllUsersExecuteChannelStoreAllUsersViews
- ContractAdministratorsForChannelOrgExecuteCreate CommandsOnMemberResource
- ContractAdministratorsForChannelOrgExecuteContract DeployCommandsOnContractResource

- ContractAdministratorsForChannelOrgDisplayContract  
DatabaseResourceGroup



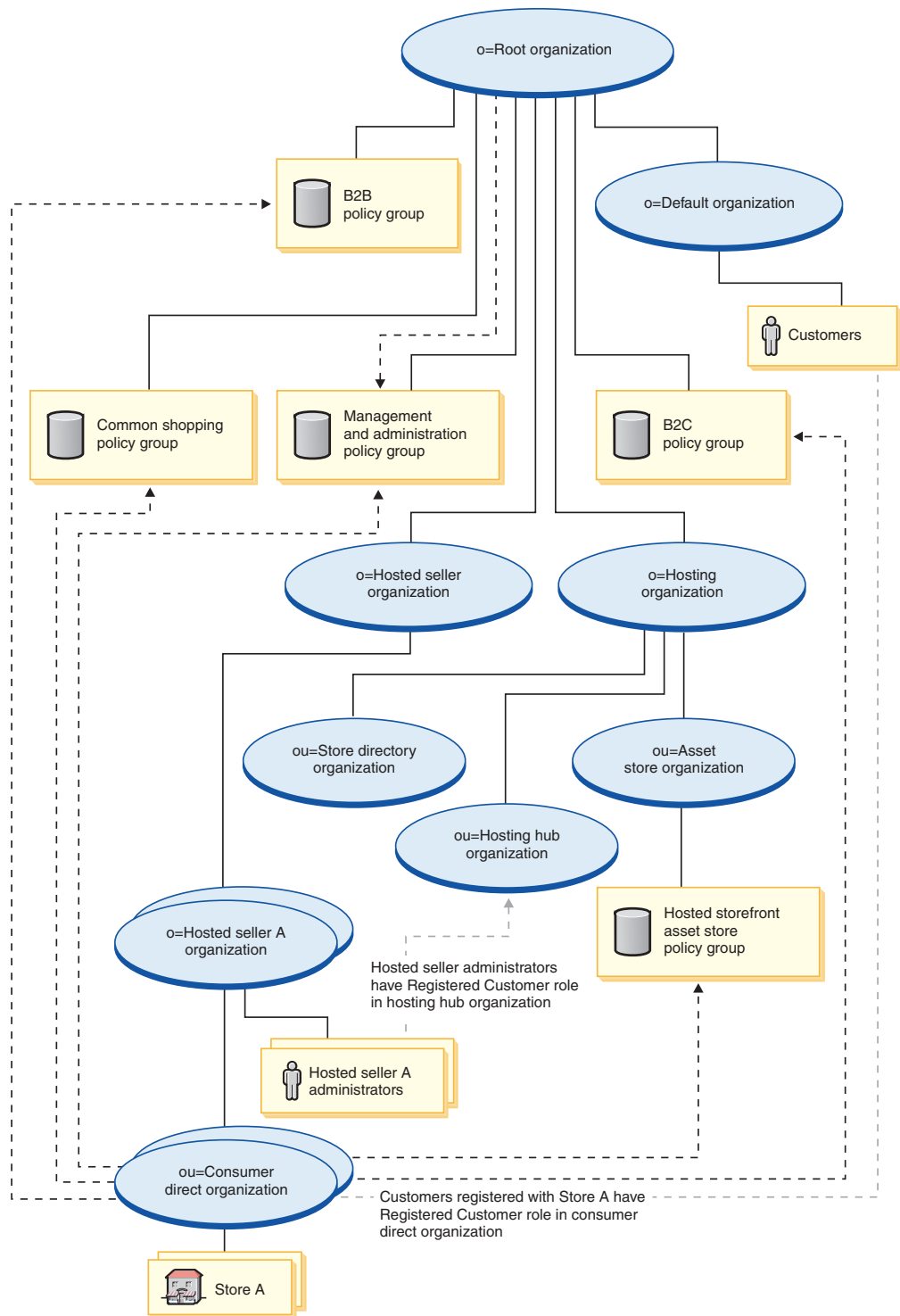
#### Legend



The store directory organization subscribes directly to the management and administration policy group and owns and subscribes to the store directory policy group. As a result, these policies apply to the store directory, which is directly under the store directory organization.

The store directory policy group contains the following policy:

- AllUsersExecutePublicStoreAllUsersViews



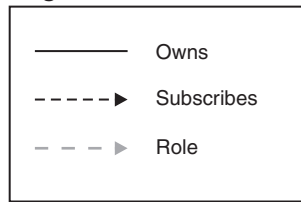
The hosted seller organization does not subscribe directly to any policy groups. As a result it inherits the management and administration policy group from the root organization. These policies apply to the hosted seller organization and the hosted seller A organizations that it owns, as well as to the hosted seller A administrators.

The consumer direct organization subscribes directly to the management and administration, the common shopping, B2B and B2C policy groups, as well as to the hosted storefront asset store policy group. These policies apply to all stores



owned by the consumer direct organization.

#### Legend



## Dynamically created roles

Customers are given the Registered Customer role in the organization that owns the hosted store to which they are registering (for example, ou=B2C Organization).

When you register a new reseller, the following roles get assigned:

- The new reseller organization gets the roles: Seller, Marketing Manager, Operations Manager, Category Manager, Seller Administrator, and Registered Customer.
- The administrator created for the new reseller organization is granted the role of Registered Customer, Seller, and Seller Administrator in the new reseller organization, and Registered Customer in the Hosting Hub organizational unit.

This information is picked up from the MemberRegistrationAttributes.xml file. For more information, see “Roles and the MemberRegistrationAttributes XML file” on page 4 or the WebSphere Commerce online help.



---

## Chapter 23. Hosting sample store (Hosting Hub) overview

Commerce Hosting Hub is the new sample of a hosting site provided with WebSphere Commerce. Use this sample to get started on setting up a hosting site where you will be able to host sellers with a partitioned catalog (that is, independent catalog) or host sellers who share the catalog assets provided by you.

This sample illustrates the following features:

Self-provisioning features include:

- Sellers self-register from the hosting hub.
- Once approved, sellers can create a hosted store using the Store Creation Wizard.
- Sellers have store management capabilities such as change store look and feel, marketing, product management, and others.
- Sellers have organization and user management capabilities.

Store locator features from the store directory site include:

- Seller-created hosted stores are automatically added to the store directory.
- Customers can locate stores based on store category.
- Customers can locate stores based on products.
- Sellers self-register from the Hosting hub.

Catalog management features include:

- Shared catalog (for hosting sellers that share the master catalog)
  - Manufacturer or distributor preload the master catalog to be shared by sellers.
  - Sellers select the categories and products from the master catalog and, optionally, create store specific products for sales in their own hosted stores.
- Partitioned catalog (for hosting independent stores)
  - No shared catalog data preloaded for the hosted stores.
  - Sellers load their own store-specific products for sales in the hosted stores.

Commerce Hosting Hub provides all the pages and features necessary for a functioning Value Chain Hosting online site. It is packaged with WebSphere Commerce as a store archive. All that is required to view the sample store is to publish the archive to the WebSphere Commerce server using the publishing tool provided in the WebSphere Commerce Administration Console. It is based on a typical hosting flow. The sample store pages can be customized. All Commerce Hosting Hub sample store pages use JavaServer Pages and XML to load the necessary data.



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## Chapter 24. Creating a store based on the Hosting Hub

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### Part one: Publishing the hosting sample

Follow these steps to publish the business model:

1. Open the WebSphere Commerce Administration Console.
2. Logon as the site administrator.
3. Select to manage the site.
4. Click on **Store > Publish**.
5. Select Hosting.sar and click **Publish**.
6. Click **Next**.
7. Click **Next**.
8. Click **Finish**.

---

### Part two: Setting up WebSphere Commerce Payments

WebSphere Commerce Payments must be configured and started. For information on setting up WebSphere Commerce Payments, refer to the WebSphere Commerce online help, under tasks.

---

### Part three: Enabling inventory tracking for hosted stores

Hosted stores will be created with the Availability To Promise (ATP) feature enabled, but with inventory tracking disabled by default.

To enable inventory tracking for all hosted stores that will be created using the Store Creation Wizard:

1. Open the TemplateHostingContract.xml file with an editor, the file is located in the following directory: `/WC_installdir/xml/trading/xml`
2. Search for the following string: `inventoryopflags`.
3. Replace the `inventoryopflags=14` with `inventoryopflags=0` .
4. Save the file.

To enable inventory tracking for a hosted store that will be imported using an XML file from the WebSphere Commerce Accelerator:

1. Open the XML file that defines the hosted store with an editor.
2. Search for the following string `inventoryopflags`.
3. Replace the `inventoryopflags=14` with `inventoryopflags=0` .
4. Save the file.

**Note:** The `inventoryopflags` is only for the `FulfillmentCenter` element of the XML. If there is no `FulfillmentCenter` element in the XML then this step is not required.

To enable inventory tracking for a hosted store that has already been created:

1. Execute the following SQL: `Update ffmcenter set inventoryopflags='0' where name = '<fulfillment center name of the store>`
2. Repeat step 1 for all the fulfillment centers of the store.

---

## Part four: Disabling approval for seller registration

There are two options provided for the site administrator to setup new seller registrations. The approval flow is enabled by default. To disable complete the following steps:

1. Open the WebSphere Organization Administration Console.
2. Logon as the site administrator.
3. Click **Access Management > Organizations**.
4. Select Hosted Seller Organization and click **Approvals**.
5. From the available approvals window, click **Disable Inherited Reseller Registration Approvals**, click **Add**.
6. Click **OK**.

---

## Part five: Creating scheduled jobs for the site

Several scheduled jobs needs to be created at a site level to take care of the order transition flow (or ATP fulfillment management) and to trigger a number of e-mail reports for the hosted stores. Scheduled jobs needs to be created from the Administration Console.

The following list shows the scheduled jobs that are recommended to be created for the site:

- `ExecuteSpecifiedCommandForHostedStores`
  - `BalancePayment`
  - `PayCleanup`
  - `ProcessBackorders`
  - `RAReallocate`
  - `ReleaseExpiredAllocations`
  - `ReleaseToFulfillment`
- `ReportsNotify`

Here is a brief descriptions of the jobs:

### **ExecuteSpecifiedCommandForHostedStores**

This job accepts a parameter called "commandName". The purpose of this job is to execute the command that is specified for all the hosted stores in the site. The actual command being passed in as "commandName" should be able to execute by only requiring the "storeId" parameter.

### **BalancePayment**

This command calls the `DoDepositCmd` task command to capture payment once the order has been shipped. This command implements the automatic payment capture function for WebSphere Commerce.

### **PayCleanup**

This command cancels WebSphere Commerce orders with payment authorization requests rejected by the respective financial institutions for longer than a store configured period of time.

### **ProcessBackorders**

This command allocates inventory to backorders which were created when inventory was not available.

### **RAReallocate (Redistribute allocations against expected inventory)**

This command redistributes open Expected Inventory Records (EIR)

against existing backorders. This is required to more accurately predict when backordered order items will be available as EIR information is added or modified, and as previously backordered items are deleted or allocated.

#### **ReleaseExpiredAllocations**

This command returns allocated inventory back into the receipt table from a previously allocated order line item which has exceeded its expiration time limit.

#### **ReleaseToFulfillment**

This command releases allocated items on an order to fulfillment.

#### **ReportsNotify**

This job triggers a number of e-mail messages for the hosted stores. The e-mail messages triggered are order summary report, store commerce report, store usage report, and site commerce report.

**Note:** E-mails can only be received if the corresponding transport and message types are configured correctly. See part 6 of the setup procedures for configuration steps.

To create a scheduled job, follow the instructions found in the online help, called *Scheduling a job*. The following table lists the recommended parameters for each job:

*Table 15. Recommended job scheduling parameters*

Scheduled job name	Job parameters	Recommended start time	Recommended interval (seconds)	Recommended priority
ExecuteSpecifiedCommandForHostedStores	commandName =BalancePayment	00:00	86,400	1
ExecuteSpecifiedCommandForHostedStores	commandName =PayCleanup	00:00	86,400	1
ExecuteSpecifiedCommandForHostedStores	commandName =ProcessBackorders	00:00	86,400	8
ExecuteSpecifiedCommandForHostedStores	commandName =RARallocate	00:00	86,400	1
ExecuteSpecifiedCommandForHostedStores	commandName =ReleaseExpiredAllocations	00:00	3,600	8
ExecuteSpecifiedCommandForHostedStores	commandName =ReleaseToFulfillment	00:00	3,600	10
ReportsNotify		00:00	86,400	1

---

## **Part six: Configuring e-mail notification for the site**

The following procedure enables customer e-mail notification when payment is authorized, when an order is authorized, and when an order is cancelled, and so on.

**Note:** You must have a mail server set up in order to e-mail customers. If you do not have a mail server set up, you will not be able to send e-mail notifications, but the rest of the features of the sample store will still work.

The following table shows the e-mail notifications that must be configured for the site:

*Table 16. E-mail notifications to be configured for site*

E-mail notifications supported	Message type
Password reset	Notification message for password reset
Authorized order	Message for a authorized order
Submission order	Message for a received order
Canceled order	Notification message for a canceled order
Shipping notification	Message for notifying the customer of an order release manifestation
Wish list	A broadcast message
Approved seller registration	Notification of approved reseller registration
Rejected seller registration	Notification of rejected reseller registration

The following table shows the e-mail notifications that must be configured for the Commerce Hosting Hub:

*Table 17. E-mail notifications to be configured for Commerce Hosting Hub*

E-mail notifications supported	Message type
Site commerce report	Message for site commerce report
Feedback/comments	Message submitted by customer

To enable e-mail notifications, do the following:

1. Configure the transport
  - a. Open the Administration Console using a Site Administrator ID.
  - b. On the Administration Console Site/Store Selection page select Site *or* Store. If you selected Store, the Select Store and Language section displays.
    - From the Name list, select the store.
    - From the Language drop-down list, select the language.
    - Click **OK**. The Store Administration Console home page displays.
  - c. From the Configuration menu, click **Transports**. The Transport Configuration page displays.
    - If the e-mail transport is not listed
      - 1) Click **Add**. The Add Transport dialog opens.
      - 2) Select the check box next to the transport you want to add to the store. You can select all transports by selecting the check box at the top-left. If there are no transports available, then you have already added all of the transports made available by the Site Administrator.
      - 3) Click **Add** to add the transport, or click **Cancel** to return to the Transport Configuration page.
    - If the e-mail transport is listed
      - 1) Verify that the E-mail transport has a status of *Active*. If the e-mail status is inactive, select it, then click **Change Status**.



- 2) Select E-mail then click **Configure**. The Transport Configuration Parameters page displays.
  - 3) In the Host field, type your fully qualified mail server name, for example, myserver.ibm.com.
  - 4) In the Protocol field, type smtp in lowercase letters, or the protocol of your choice. Click **OK**.
2. Configure or create the message types
    - a. Open the Administration Console using a Site Administrator ID.
    - b. On the Administration Console Site/Store Selection page select Site *or* Store. If you selected Store, the Select Store and Language section displays.
      - From the Name list, select the store.
      - From the Language drop-down list, select the language.
      - Click **OK**. The Store Administration Console home page displays.
    - c. From the Configuration menu, click **Message Types**. The Message Type Configuration page displays.
    - d. Create the notification to be sent as follows:
      - 1) Click **New**. The Message Transport Assignment page displays.
      - 2) Select the message type from the Message Type drop-down list. See the previous table for the message types to use in your site/store.
      - 3) In the Message Severity field, type 0 to 0.
      - 4) From the Transport drop-down list, select **E-mail**. If e-mail is not there, do the following:
        - a) From the Device Format drop-down list, select **Standard Device Format**.
        - b) Click **Next**. The Message Transport Assignment Parameters page displays
        - c) Complete the fields as follows:
 

**Host** The fully qualified name of your mail server, for example, example.ibm.com

**Protocol Type** smtp (you must use lowercase letters), or the protocol you are using.

**Recipient** Enter a valid e-mail address. This address will be replaced by the customer's e-mail address at run time if the message is intended for a shopper.

**Sender** Enter an e-mail address that you want to use as the sender of the message, for example, orders@example.ibm.com. The address must be an e-mail address for a valid user on the mail server.

**Subject** Enter the text that you want to display as the subject line of the message, for example, Your order has been accepted.

**Note:** Repeat the create message type for each notification listed in the tables. Configure the transport for each of the hosted stores after they are created.

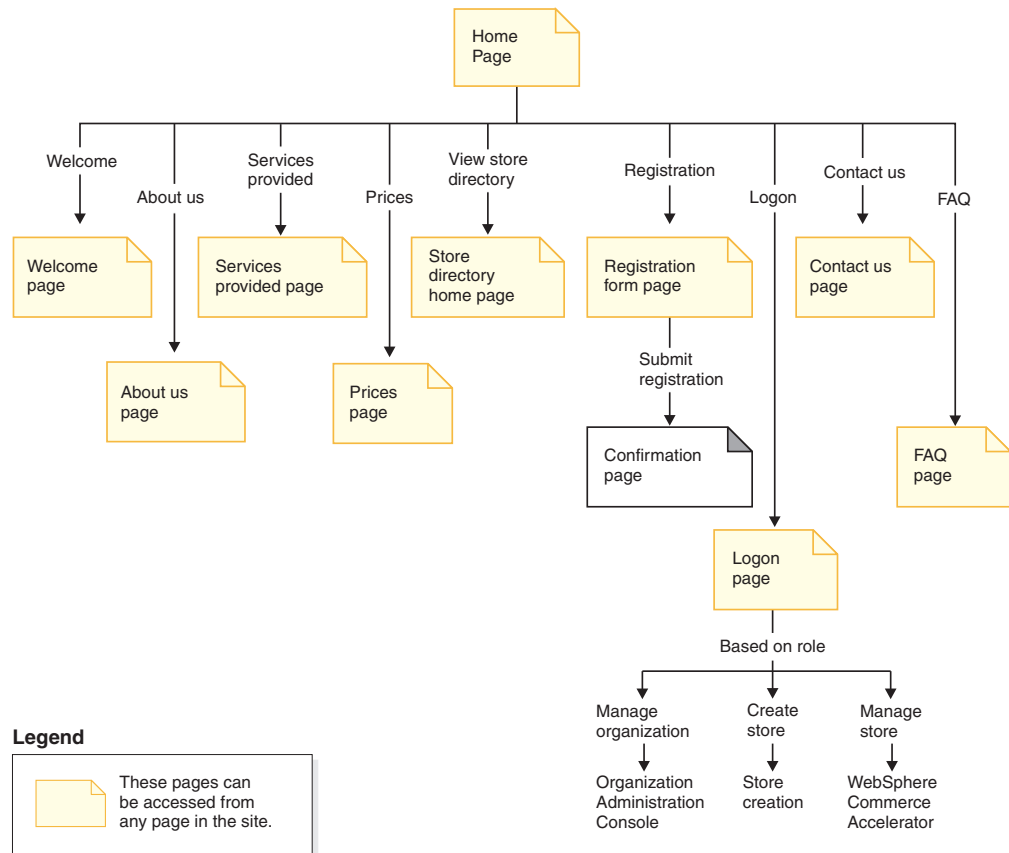
## Part seven: Provide sample catalog.csv file for sellers to download

It is recommended to place the sample catalog.csv file for sellers to download from the Commerce Hosting Hub. This sample could serve as a starting point for sellers to create their catalog structure. A sample can be found in the samples directory: `/WC_installdir/samples/catalogimport/catalog.csv`

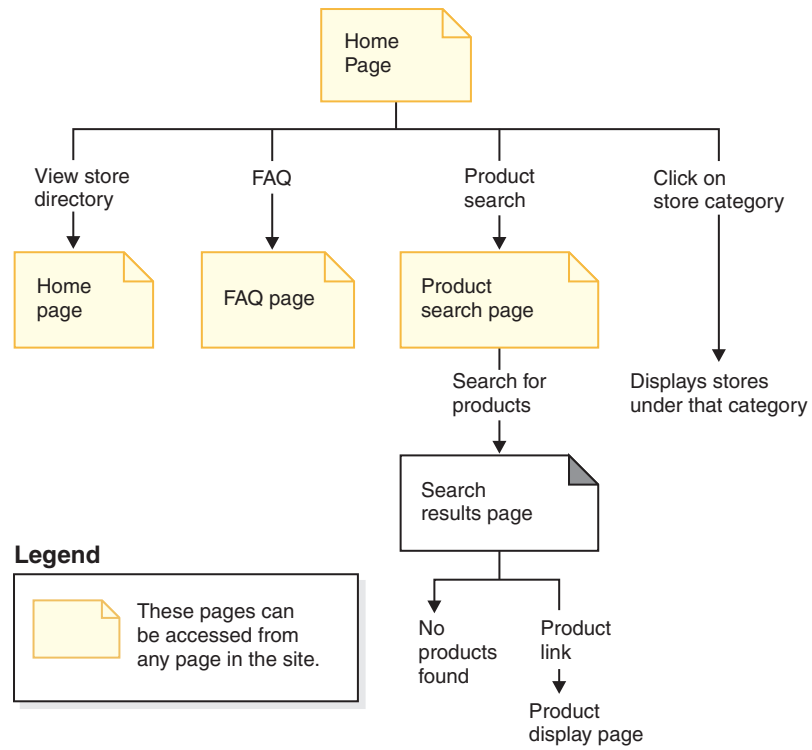
## Commerce Hosting Hub store flows

The following diagrams show the basic store flow of the Hosting Hub and the Store directory.

### Hosting Hub store flow



## Store directory store flow





---

## Chapter 25. Commerce Hosting Hub use cases

The hosting sample comes with uses cases that follow customers through the new seller registration process, approval, hosted store creation, and opening the hosted store for business.

---

### Register a new seller

This use case describes the functional flow of events when a new seller registers in the Commerce Hosting Hub.

#### Pre-condition

The customer comes to the Commerce Hosting Hub

#### Basic Flow

1. The customer decides to register as a new seller. The customer clicks the registration link. The Registration form page displays.
2. The customer fills in the required information and clicks on Submit Registration.
3. The system creates an organization and a user for the new seller.
4. The system assigns the roles to the organization and the user as it is described in the MemberRegistrationAttributes.xml file. For more information, see “Dynamically created roles” on page 219
5. The system determines if approval is required for the user before it becomes active.
6. The system displays a confirmation page.
7. The customer awaits for the registration confirmation e-mail.

#### Post-Condition

The system either activates the user id immediately if there are no approvals required. This would mean the customer can use the logon id created right away. Or the system submits the approval request for the Site Administrator, thus the logon id created will be disabled.

---

### Create a hosted store

This use case describes the functional flow of events when a seller creates a hosted store in the Commerce Hosting Hub.

#### Pre-condition

The seller has registered and is logged on in the Commerce Hosting Hub.

#### Basic Flow

1. The seller clicks **create store** link.
2. The system displays the Store Creation Wizard language selection page.
3. The seller selects the default language for the store and clicks **OK**.

4. The system displays the general page of the Store Creation Wizard. If there are store categories defined then the page will display the store category selection field.
5. The seller fills in the information about the store and selects a default currency. The seller clicks **Next**.
6. The system determines all the stores with store type of MPS and displays the template stores.
7. The seller selects a template store and clicks **Next**.
8. The system determines all the stores with store type of CPS and displays the catalog asset stores.
9. The seller selects an option on the catalog page and clicks **Next**.
10. The system displays the fulfillment creation page.
11. The seller adds fulfillment centers for the store and clicks **Next**.
12. The system determines the availability of WebSphere Commerce Payments and displays the payment options available on the site.
13. The seller selects the payment options to provide on the store and clicks **Next**.
14. The system displays the summary page.
15. The seller reviews the information and clicks **Finish**.

#### **Post-Condition**

The system creates the hosted store in the suspended state. The Site Administrator will need to resume it (change it to closed state) before the seller can have the authority to open the store for business.

---

## Chapter 26. Commerce Hosting Hub tutorials

**Note:** The FashionFlow tutorials apply to hosted stores (stores created using the Store Creation Wizard) except for the following:

- Guided Sell
- Creating and receiving e-mail options
- Using Product Exploration and Product Comparison

For those tutorials, see Chapter 7, “FashionFlow tutorials,” on page 79

---

### **Sending messages (comments, feedback, suggestions) to the Site Administrator**

#### **Demonstrates**

This tutorial illustrates the following features of Commerce Hosting Hub:

- Send messages to the Site Administrator.

#### **Prerequisite**

Before starting this tutorial, make sure the configure e-mail notification for the site section has been completed.

#### **Sending messages**

To send a message to a Site Administrator, a seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
  2. Click **Contact us**.
  3. Select the reason from the drop down list and fill in the message.
  4. Click **Submit**.
- 

### **Self-registering in the Commerce Hosting Hub**

#### **Demonstrates**

This tutorial illustrates the following features of Commerce Hosting Hub:

- Register a new seller.

#### **Self-registering**

To self-register in the Commerce Hosting Hub, a prospective seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **Registration**
3. Fill in the required information and click **Submit Registration**.
4. If the approvals are enabled then Site Administrator needs to approve user. Otherwise, skip to the next section.
5. From the Commerce Hosting Hub, click **Logon**.
6. Logon as the Site Administrator

7. Click **Approval Requests**, under the **Approvals** menu.
8. Select the new seller registration and click **Approve**.
9. Type some comments and click **OK**.

---

## Creating a hosted store with an empty catalog

**Note:** *This note is for the value chain hosted stores created with the Store Creation Wizard only. When a seller creates a hosted store, this is not a regular store publish, and additional store language data assets beyond the store default language are not carried over into the hosted store. So, if a seller adds a supported language to a store, the store assets for that language are not available. If a supported language is going to be added to a hosted store, ensure that the translated assets (store data, and properties files) are available to the store or the store pages will not function correctly.*

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Create a hosted store.

## Creating a hosted store with an empty catalog

To create a hosted store with an empty catalog, a new seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **Logon**.
3. Type your logon ID and password and click **Logon**.
4. Click **Create store**. The Store Creation Wizard loads on the same browser.
5. Select a language and click **OK**.
6. In the general page, fill in all the information regarding the store. Choose CAD because the catalog data that will be uploaded has Canadian prices. Click **Next**.
7. In the store type page, select a profile store to share its JSP and business processes. Click **Next**.
8. In the catalog page, select the type of catalog for the store. Choose empty catalog for this example. Click **Next**.
9. In the fulfillment page, type the name of the fulfillment center. Click **Next**.
10. In the payment page, select the payment methods for the store. Note that this page currently expects WebSphere Commerce Payments to be configured in order to display the payment methods. Click **Next**.
11. In the summary page, review all the information. Click **Finish**.

---

## Creating a hosted store with a shared catalog

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Create a hosted store.

## Creating a hosted store with a shared catalog

To create a hosted store, a new seller can do the following:



1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **Logon**.
3. Enter logon id and password and click Log on.
4. Click **Create store**. The Store Creation Wizard loads on the same browser.
5. Select a language and click **OK**.
6. In the general page, fill in all the information regarding the store. Choose USD because the shared catalog data has USD prices defined. Click **Next**.
7. In the store type page, select a profile store to share its JSP file and business processes. Click **Next**.
8. In the catalog page, select the type of catalog for the store. Select the existing catalog for this example. Click **Next**.
9. In the fulfillment page, type the name of the fulfillment center. Click **Next**.
10. In the payment page, select the payment methods for the store. Note that this page currently expects Commerce Payments to be configured in order to display the payment methods. Click **Next**.
11. In the summary page, review all the information. Click **Finish**.

---

## Resuming a new hosted store

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Resume a hosted store from the suspended state.

### Resuming a new hosted store

To resume a new hosted store, a Site Administrator can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **logon** and use the Site Administrator.
3. Click **manage store**.
4. Select Commerce Hosting Hub and click **OK**.
5. Click **Hosting > Hosted Stores**.
6. Select the hosted store and click **Resume**.

---

## Changing hosted store information

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Change store information (such as name, description, or address).
- Change store supported currencies and languages.

### Prerequisite

Before starting this tutorial, there needs to be a seller that has created a hosted store on the site.

### Changing hosted store information

To change hosted store information, an existing seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **logon**.
3. Click **manage store**.
4. Click **Store > Change profile**.
5. Modify the store name, description and contact information.
6. Add a new currency and a new supported language.
7. Verify the changes on the hosted store front page and contact us page.

**Note:** When adding new currencies, there must be prices defined in the catalog for the new currency or a conversion rate must be defined. When adding new languages, the store's information must be defined in the new language (that is, store profile information, catalog description, shipping mode description, and so on).

---

## Changing hosted store look and feel

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Upload and change the store logo.
- Change store pages by modifying messages.
- Change store style, color and banner.

### Prerequisite

Before starting this tutorial, there needs to be a seller that has created a hosted store on the site.

## Changing a hosted store's look and feel

To change a hosted store's look and feel, an existing seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **logon**
3. Click on **manage store**
4. Change the store logo
  - a. Click **Store > Upload Logo**.
  - b. Click **Browse**. Select an image file from your machine. Click **OK**.
  - c. Click **Upload and Apply**.
5. Change the store pages
  - a. Click **Store > Change Pages**.
  - b. Select the **Home** section.
  - c. Add some HTML text.
  - d. Click **OK**.
6. Change the store style
  - a. Click **Store > Change Style**.
  - b. Modify style, colors, or banner.
  - c. Click **View Store** to see the changes in the storefront.

---

## Changing the hosted store flow

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Change store basic flow.

### Prerequisite

Before starting this tutorial, there needs to be a seller that has created a hosted store on the site.

## Changing the hosted store flow

To change the hosted store flow, an existing seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **logon**.
3. Click on **manage store**.
4. Click **Store >Change Flow**.
5. Go to the Order Status panel and uncheck Track order status. Click **OK**.
6. Launch the storefront, go to My Account link and see that Order Status has been removed.

---

## Importing and loading catalog data

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Import and load catalog data.
- Upload catalog images.

### Prerequisite

Before starting this tutorial, there needs to be a seller that has created a hosted store with an empty catalog.

## Importing and loading catalog data

To import and load catalog data, an existing seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **logon**.
3. Click on **manage store**.
4. Click **Catalog Import** under the **Merchandising** menu.
5. Click **Upload Catalog**.
6. Select the encoding and choose a file from your file system to upload. A sample is located in `/WCS_installdir/samples/catalogimport/catalog.csv`
7. Click **Upload File**.
8. From the catalog import list, select the uploaded file and click **Publish Catalog**.
9. Wait about 5 minutes until the catalog import finishes uploading the data.
10. After the catalog is published. Click **Upload Images**.

11. Click **Browse** and upload the image of your choice. The sample images are located in `/WCS_installdir/samples/catalogimport/images.zip`
12. Select the destination folder and click **Upload**.
13. Verify the storefront.

---

## Filtering products for the store

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Filter out categories or products.
- Adjust prices for the hosted store from the master catalog.

### Prerequisite

Before starting this tutorial, there needs to be a seller that has created a hosted store that uses the shared master catalog.

### Filtering products for a store

To filter products for the store, an existing seller can do the following:

1. Go to the Commerce Hosting Hub site at `http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp`
2. Click **logon**
3. Click on **manage store**
4. Click **Catalog Filter** under the **Merchandising** menu.
5. Click the **Monitors** category and click **Exclude**.
6. Click **Save**.
7. Click **Refresh**.
8. Open the store front and see that the Monitors category does not show anymore.
9. Navigate through the IBM Thinkpads and always choose the first available category or product until you get to the item display page. Note the price of the product since we will use the catalog filter tool to markup this price.
10. Go back to the manage store window, expand the IBM Thinkpad, expand the IBM Thinkpad i Series, expand the IBM Thinkpad i Series1200.
11. Select the **TPi1200 700 128 64/10 24X 13.3"** product.
12. Click **Calculate price**.
13. Click **Set Price Adjustment**
14. Enter 50% Markup, click **OK**.
15. Click **Save**.
16. Click **Refresh**.
17. Click **Calculate price** and the price should be 50% more than in step 12.
18. Verify the storefront price of this product.

---

## Creating and using coupons

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Creating a coupon promotion.

- Advertising a coupon promotion.
- Uploading an image file.
- Registration.
- Quick checkout profile.
- Regular checkout.
- Adding a coupon to your coupons list.
- Redeeming a coupon.

## Prerequisite

Before starting this tutorial, there needs to be a seller that has created a hosted store on the site.

## Creating coupons

To set up coupons for your store, an existing seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **logon**
3. Click on **manage store**
  - a. From the **Merchandise** menu, click **Coupon Promotions**. The Coupon Promotion window displays, containing a list of the currently defined coupon promotions.
  - b. Select **New...** to create a new coupon promotion. You are now on the Coupon Promotion General Information page.
  - c. In the Name text box, type **Coupon Promotion 03**.
  - d. In the Description text box, type a description of the coupon that you are offering. You type **20% off order**.
  - e. Now, you have to determine when this coupon will be in effect. You can either select for it to always be in effect, or you can determine a specified time period. If you select a **specified time period**, you must type the start date, end date, start time, and end time. You want to do that option. So, type *today's date* (in the format indicated) as a start date, *a week from today (in the format indicated)* as the end date, and have it start at **7:00** and end at **23:00**.
  - f. Select **Next** to go to the Details page.
  - g. Select your currency, **USD**.
  - h. Under Number of Coupons to offer, select **Any number**.
  - i. Under Purchase Condition Type, select **Order Type**. (You would select product type if you wanted to apply your coupons to a specific product, and not to the entire order).
  - j. Select **Next** to go to the Order Purchase Condition page.
  - k. For the Minimum amount qualification, type **\$200.00**. This is the minimum amount that a customer has to spend to receive the coupon promotion. If you wish to apply a maximum amount qualification, you may also do so here. If you make that selection, a text box will appear for you to type the amount. However, in this case, you do not wish to type a maximum.
  - l. Select **Next** to go to the Coupon Value page.
  - m. Now, you determine if you want your **Coupon as a percentage**, or a fixed amount. In this case, you have said you want to offer 20% off your order.

- So you select that. (If you had selected to have a fixed amount, a text box would appear for you to type the amount.)
- n. Click **Finish** to save the coupon promotion. The coupon promotion is displayed in the Coupon Promotion list, and automatically set as active. You should receive a message stating that the coupon promotion was created successfully. Click **OK**.
  - o. You return to the **Coupon Promotions** page, and you should see your coupon.
4. Now you are ready to create ad copy.
    - a. From the **Marketing** menu, select **Ad Copy**.
    - b. Select **New...** to create some ad copy for your new coupon promotion. (If you wanted to change, delete, or receive a summary of an existing promotion, select those options). You are now on the General Definition page.
    - c. In the Ad Copy name text box, type **Coupon Promotion 03 ad copy**.
    - d. In the Type drop down box, select **Image**.
    - e. In the URL drop down list, select **Coupon Promotion**. Now click **List** to select the coupon promotion. This will take you to the Coupon List page. Check the box next to your coupon promotion. There are two custom fields on this page, if you have additional information to type. Click **Next**. This will take you to the Description Definition page.
    - f. In the **Location** text box, type the relative path name of the flash or image file with respect to the store home directory (that is, with respect to `WAS_installpath/InstalledApps/WC_Enterprise_App_instancename.ear/wcstores.war/store_name`). Type `images/coupon_20_percent.gif`. (Note: create and copy a 20 % GIF inside the zip to `/WebSphere/AppServer/installedApps/WC_Enterprise_App_instancename.ear/wcstores.war/storedir/images/`).
    - g. In the Marketing text box, type the text that will be displayed with the coupon image in the store.
    - h. Click **Finish**. You should receive a message stating that the ad copy was successfully created. Click **OK**.
    - i. You return to the Ad Copy page, and you should see your ad copy. If you choose, you can select this ad copy, and change it, delete it, or receive a summary.
  5. Create a campaign.
    - a. From the **Marketing** menu, select **Campaign**. The Campaign window displays, containing a list of currently defined campaigns.
    - b. Select **New...** to create a new campaign. You are now on the **General Definition** page.
    - c. Type a campaign name, **Sample campaign**. Type a campaign description, such as **20% off your order when you spend \$200**. This description will appear in the Campaign List window, and helps to identify the campaign. Type the following description: **20% off order coupon**. Click **Next**. You are now on the Business Objectives Definition page.
    - d. Type the campaign sponsor and campaign objectives. Type **Campaign Owner**, and the objective is **To increase consumer spending**.

- e. Click **Finish** to save the campaign. You should receive a message stating that the campaign was successfully created. Click OK. The campaign is displayed in the Campaigns list. You must create initiatives before this campaign can be used.
6. Create campaign initiatives.
    - a. From the **Marketing** menu, select **Campaign Initiatives**. The Campaign Initiatives window displays, containing a list of currently defined campaign initiatives.
    - b. Select **New...** to create a new campaign initiative. You are now on the General Definition page.
    - c. Type a campaign initiative name, **Sample coupon promotion**.
    - d. In the **initiatives classification** drop down list, select **coupon**.
    - e. In the description text box, type a description for your initiative, such as **Campaign initiative for the sample campaign promotion**.
    - f. In the **campaign** drop down list, select the campaign, in this case, **Sample campaign**.
    - g. Click **Next** to go to the Defining displayed dynamic content (what) page.
    - h. Select **show advertisement**, and then **Advertise Coupon**.
    - i. From the right box, select the correct available ad copy for this campaign initiative, **Coupon Promotion 03 ad copy**.
    - j. Click **Add**, to add the ad copy to the Selected ad copy box.
    - k. Click **Next** to go to the Defining target customers (who) page.
    - l. Select **Target all customers**. If you select Target customer profiles, you must have some customer profiles already defined.
    - m. Click **Next** to go to the Defining dates for targeting customers (when) page.
    - n. Select **Everyday**, since you have already set your specified time period.
    - o. Click **Next** to go to the Defining target customer behaviors (which) page. If there are any customer behaviors already defined, they will appear here.
    - p. In this scenario, we do not want to add a customer behavior. Click **Finish** to save this campaign initiative. You should receive a message stating that the campaign initiative was successfully created. The campaign initiative is displayed in the Campaign Initiatives list. If you want to change, duplicate, suspend, resume, or delete this initiative, select the appropriate option and follow the wizard to complete those steps.
  7. Schedule the coupon promotion.
    - a. From the **Marketing** menu, select **e-Marketing Spots**.
    - b. From this list, select **StoreHomePage**, to have the coupon display on your store's home page.
    - c. Select the **schedule** button. This takes you to the Campaign Initiative Scheduling page.
    - d. Schedule a new campaign initiative by selecting **New...** This takes you to the Schedule Campaign Initiatives page.
    - e. In the Selected Campaign drop down list, select **Sample campaign**.
    - f. From the Available campaign initiatives, select **Sample coupon promotion**.
    - g. Click **Add**, to add the campaign initiative to the Selected Campaign Initiatives box.



- h. You decide to run this campaign initiative indefinitely, so you select that choice. Click **OK** to save the scheduling information. You will see that your campaign initiative is scheduled. If you want to change the schedule, select it, and make your changes.

### Upload the promotion image

1. Select **Store >Manage Files**.
2. Select the destination folder.
3. Click **Browse**, and select the image file that you want to upload.
4. Click **Upload**.
5. Reload the store front page in your browser to view the coupon promotion.

## Using coupons

In the following exercise, you are the shopper that goes to the store. When you enter the store, you notice that there is a 20% off coupon advertised on the home page. As a result, you decide to register. To start shopping, do the following:

1. In the hosted store, click **Register**. The Registration page displays.
2. Enter the information in the registration fields. Click **Submit**. The My account page displays.
3. The My account page allows you to administer your account information. While you are in the My account page, you realize it contains a Quick Checkout Profile section. You decide to set up a quick checkout profile now, so you can go through the checkout process more quickly. Click **Create or update profile**.
4. In the Quick Checkout Profile page, type your billing and shipping addresses, as well as your preferred method of shipping and payment information. For the purposes of this Tutorial, type the following credit card information:
  - a. From the **Credit card type** drop down list, select **Visa**.
  - b. In the **Card number field**, type 4111111111111111.
  - c. From the **Expiration month** drop down list, select 10.
  - d. From the **Expiration year** drop down list, select 2004.
5. Click **Submit**. The My account page displays.
6. Click **Home**. The Home page displays. Notice that a banner advertising coupons now displays at the right side of the home page.
7. In the banner, click the 20% off image to receive the coupon. The My coupons page displays, stating that the coupon is good for the entire order and does not have an expiry date.
8. Now, you need to buy something from the store. Find a product(s)
9. Click **Add to shopping cart**. The Shopping Cart displays. Review the items in your shopping cart.
10. Click **Quick checkout**. The Quick Checkout Order Summary page displays.
11. To redeem your coupons, click Redeem coupons. The applicable coupons page displays.
12. Since the entire order coupon is applicable to your order, select it, then click Apply coupons. The Checkout - Order summary page redisplay. Notice that your coupon discount has now been applied.
13. Review your billing and shipping information.
14. Enter your credit card information. For the purposes of this Tutorial, repeat the credit card information detailed in step 4 above.



15. When you are satisfied that your order is correct, click **Order now**. The Order confirmation page displays, stating the details of your order.

---

## Displaying operational reports

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Finding orders placed by customers
- Display operational reports

### Prerequisite

Before starting this tutorial, there needs to be a seller that has created a hosted store. One or several test orders must be placed in the store to get relevant data in the reports.

### Displaying operational reports

To display operational reports, an existing seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **logon**
3. Click on **manage store**
4. Click **Find Orders** under the **Operations** menu.
5. Click **Advanced search**
6. Select a **Start Date** and **Click Find**.
7. The order list should display the new order from the shopper.
8. Click **Operational Reports** under the **Reports** menu.
9. Click **Order Status Report**.
10. Choose **Start Date** and **End Date**. Click **OK**.
11. The new order should be listed.

---

## Opening a store for business

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Opening a store for business.

### Prerequisite

Before starting this tutorial, there needs to be a seller that has created a hosted store.

### Opening the store

To open a store for business, an existing seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **logon**.
3. Click on **manage store**.
4. Click **Store >Open/Close**.

5. Click **Open Store**.

---

## Creating an administrator for handling a catalog

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Creating an administrator.
- Assigning role to an administrator.
- Display role based store management tooling.

### Prerequisite

Before starting this tutorial, there needs to be a seller that has created a hosted store.

## Creating an administrator

To create an administrator for handling a catalog, an existing seller can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **logon**
3. Click **manage organization**.
4. Click **Users** under the **Access Management** menu.
5. Click **New**.
6. In the first page of the wizard, fill in information.
7. In the second page, make sure you choose the **Parent Organization**. Click **Finish** when the information is all filled in.
8. From the user list, select the **new user** and click **Roles**.
9. Select the **organization**.
10. Select the **Category Manager** role.
11. Click **Add**.
12. Click **OK**.
13. From the Commerce Hosting Hub, click **logout**.
14. Logon as the new Category Manager. Notice that Category Manager cannot manage organization nor create store.
15. Click **manage store**. See the menus are limited to what this role can do.

---

## Using the store locator

### Demonstrates

This tutorial illustrates the following features of Commerce Hosting Hub:

- Locating stores by store category.
- Finding stores by product.

### Prerequisite

Before starting this tutorial, there needs to be a hosted store in the site.

## Using the store locator

To use the store locator, the customer can do the following:

1. Go to the Commerce Hosting Hub site at <http://host/webapp/wcs/stores/servlet/CommerceHostingHub/index.jsp>
2. Click **view store directory**.
3. A new browser will open with the Store Directory site.
4. Click the **All Store Categories** link.
5. On the right most frame, click the **new hosted store** link.
6. Register and place an order. Customer registration is optional.
7. On the Store Directory browser, click on **Product Search**.
8. Enter a product name in the **Name** field and click **Search**.
9. From the search results page, click either the **store name** link or the **product name** link.



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## Part 8. Appendixes



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## Appendix. Notices

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